PTBoard Volunteer Signup Guide

- Steps to Draft, Edit, Publish, and Copy Signups
- Manage Volunteer Notification Emails
- View and Contact Members of the Class
- How to Change Display Order
- How to Signup Others
- Other Volunteer Signup Features
- PTB Volunteer Signup Tutorial

How to Locate the Volunteer Signup Feature

1. From the left menu of the Home page (htttps://sves.ptboard.com), select the teacher's name under Class & Group.
2. On the Class & Group page, select "Volunteer Signups" or the arrow icon next to it.

How to Create a Draft

1. Select the "Create a Volunteer Signup" button in the top right corner. This option is only available to Room Parents.
2. Select the "Single Event or Time Slot" option and the "Continue" button.
3. Select a Template.
4. Enter information for Event Details.
   a. **Title**: Include "Amazing Earth" or "Great Art" and details in your title.
      - **For example**: Walker's Amazing Earth: Monarch Butterflies, Thursday, October 10th at 3:00p
   b. **Description**: Provide information about this month's topic, artist, activity, etc. (see Template Volunteer Sign Up Text to copy, paste or create your own)
   c. Select the "Add/Edit Signup Items" button.
5. Enter information for Signup Items.
   a. **Date, Start Time, End Time**: Presentations are typically one hour, unless otherwise noted.
   d. **Item Name or Task**: Enter 2 items: Presenter and Activity Helper
   e. **Item Quantity**: 1 presenter; 2-4 activity helpers depending on the project
   f. **Item Note**: Optional field for additional information.

g. Select the "Update to the signup" button.

h. Select the "Save & Continue" button.

6. You have a DRAFT Volunteer Signup. Only Room Parents can see the draft version of Volunteer Signups.

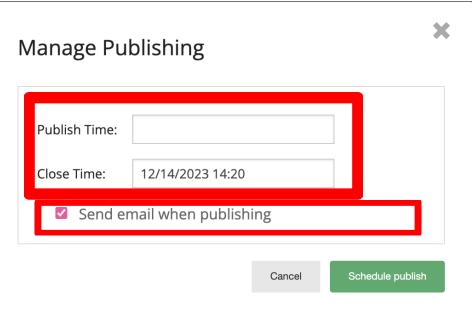7. To Publish, Copy or Edit the Volunteer Signup, see Steps below.

How to Edit

1. Locate the Volunteer Signup in the appropriate tab, i.e "Draft" or "Open".
2. Select the 3 white lines to the right of the title of the Volunteer Signup and select the "Edit" option.
3. Select Title, Description or Location to edit those items.
4. Select the "Add/Edit Signup Items" button to edit the Signup Items—Date, Start Time, End Time, Item Name or Task, Item Quantity or Item Note.
    a. Update the date and time in BOTH the header AND the description.
    b. Update the calendar under the description field to ensure signup reminders are activated 48 hours prior.
5. Select the "Update to the signup" button.
6. Select the "Save & Continue" button.

How to Publish & Manage Volunteer Notifications

1. To publish a Draft Volunteer Signup, select the "Draft" tab.
2. Select the 3 white lines to the right of the title of the Volunteer Signup and select the "Manage Publishing" option.
3. Verify that the "Send email when publishing" checkbox is checked. All parents linked to the class will receive an email with the Volunteer Signup information.
4. Enter a Publish Time and a Close Time and select the "Schedule publish" button.
    A. If you need to wait to send, enter a future date to publish automatically. The sign-up will now show in your "scheduled" tab.
    B. Update the "close time" no earlier than the day AFTER the session.
5. To receive an email when people sign up, select the 3 white lines again and select the "Update Notification Emails" option.
6. Verify that your email is in the Email Notification.

Not Published - Created at 9/13/2023 11:00pm

Edit...

Manage Publishing...

Update Notification Emails...

Ayubi's Amazing Earth: Ecosystems, Tuesday, October 24th at 3:00pm

October's Amazing Earth about Ecosystems will be on Tuesday, October

Ayubi's class. One presenter and 2-4 activity helpers are needed to m

The session materials and volunteer FAQs are on PTBoard's Amazing

Amazing Earth.

Make a copy...

Sign Up For Others...

Close

Delete...

What is Amazing Earth? It is a one-hour science session that includes a 15-minute presentation and activity. All presentation materials, talking points and activity supplies are provided and NO special science knowledge is needed. Family members, siblings 12+, everyone is welcome to volunteer! It's a great way to be in the classroom!

Manage Publishing ✖

Publish Time:

Close Time: 12/14/2023 14:20

☑ Send email when publishing

Cancel   Schedule publish

How to Copy

1. Locate the Volunteer Signup in the appropriate tab, i.e. "Draft" or "Open".
2. Select the 3 white lines to the right of the title of your Volunteer Signup and select the "Make a copy" option.
3. Select the "Create" button.

Updated 9/15/23

4. Edit the Volunteer Signup (for specific steps, see "How to Edit").
5. Follow the steps under "How to Publish & Manage Volunteer Notifications" to send the Volunteer Signup.

How to View and Contact Members of the Class

1. From the left menu of the Home page (https://sves.ptboard.com), select the teacher's name under Class & Group.
2. Select the people icon next to Class & Group: Teacher's Name 👥
3. Note: the Room Parent title only applies to PTBoard and allows you to create and manage Volunteer Signups. Don't panic!

How to Change Display Order

1. From the main class & group page, select the title bar "Volunteer Signups" to display both signups.
2. Select the 3 white lines of one of the signups and select either move up or move down.

How to Sign Up for Others

In the signup, click on the small green icon on the right bottom corner of time slot row.

1. Enter the volunteer's details to send them a PTBoard email to create an account.
2. Optionally, select the green "sign-up" box and add their name to the "notes" field.

Other Volunteer Signup Features

Select the 3 white lines to the right of the title of the Volunteer Signup, to:
o Send emails to all class members, those signed up or those not signed up
o Close or Delete a Volunteer Signup

PTB Volunteer Signup Tutorial

If you would like to watch a brief video tutorial, click the white triangle/blue box near the top of the screen:

Home / Class & Group / Ayubi, Meghan / Group Signup

▶ Create a Volunteer Signup

| Open (0) | Scheduled (0) | Draft (2) | Closed (0) |

Not Published - Created at 9/13/2023 11:00pm

Ayubi's Amazing Earth: Ecosystems, Tuesday, October 24th at 3:00pm

Detail

October's Amazing Earth about Ecosystems will be on Tuesday, October 24th at 3:00pm in Ms. Ayubi's class. One presenter and 2-4 activity helpers are needed to make it a successful session!