EVENT SIGNUP USER GUIDE

URL: http://event.dehoney.org

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2017-08-22 /	Ver1.0	Dan DeHoney	Initial Draft
2017-10-10 /	Ver 1.1	Dan DeHoney	Completed Admin section

About Event Signup

The Event Signup application is an online system intended to replace the use of many paper signup forms with the ability to signup through an application available at meetings or from the convenience of your preferred internet connected device (like PC's, tablets, smart phones).

The Event Signup application is web based to give access to signup or review signup information anywhere or at anytime. While the application was designed with multiple devices in mind, some screen sizes and orientations may provide better appearance than others.

The Event Signup application is family based, allowing a single family member to add or remove event signup information from within a single account. Each family member will have an account to prevent the requirements to share passwords.

The Event Signup application is designed to be COPPA (Children's Online Privacy Protection Act) compliant, by only creating youth accounts in a "Disabled" state, requiring an adult member of the family to "Enable" the account, and by doing so, authorizing the youth to interact with the system.

 The Event Signup application uses several formats for interacting during signup to allow for different types of events to be available. These event types include:

- Family style signup for open capacity events like:
  o Camping Outings
  o Go See it Events
  o Service Projects
- Item based signups requiring a fixed number of items be accounted for
  o Ceremonies or parties where drinks and food are possible items
- Time Based signups where a fixed number of people per time frame are needed
  o Fundraising

While these categories are match general event types, they could also be used across categories, like signing up for times (fundraising style) to bell ringing (service activity).

The Event Signup has administrative capabilities to allow for the creation of new events, users and family associations. The Administrator(s) can also override settings when limitations might occur. Regardless, all signups track the person being signed up, as well as the logged in user performing the signup.

Reports will be expanded over time, to move from review of the signup information in the interactive views to more customized formats that meet specific needs (ex. A camping roster derived from the signup information that includes separation of youth and adult, all with their emergency contact information).

The basic concepts of the appearance are described in the keys below, and describe in the user guide

Event Key

= Camping, = Ceremony = Fundraiser = Go See It = Service
Color Key Available Some Family Signed up Not Going

User Guide

Welcome to the system

The process of getting access to the system starts with an email notification from the Administrator, including key information such as Username and Password and a link to the system

Hello John Doe,

You've been invited to use the Event Signup system located at
http://event.dehoney.org

This system is used for all group signups and allows for signing up family members to group events at your convenience! Your username and password are below, but before you get started, please make sure to take the following steps when you first log in.

1) Login with your provided username and password (password is case sensitive)
   a. You may use this email address as your username if preferred

2) Open the Profile page from the menu by clicking the gear icon .
3) Confirm your username , email, phone and emergency contact information
   a. Click Update
4) Update your family records by switch family members displayed at the bottom of the page.
   a. Note: you can only reset the password of the account that is logged in
5) ENABLE your youth family member accounts by unchecking the "Currently Disabled?" check box and clicking Update.

Now you are ready to click "All Events" from the menu and start signing up!

USERNAME: jdoe

PASSWORD: [a short randomly generated word]

Thank you,

Event Signup Administrator

Following this self explanatory email is all that is needed to get set up. Make sure to fill out the Emergency Contact information, as it will be used for default information when signing up for events, saving you time! Don't worry, each signup allows for the Emergency contact information for that event to be modified during the signup process.

Using the menu is straightforward. In a large screen format, the menu is expanded all the time. On smaller screens, it is minimized to 3 flat lines and can be opened by touching the icon. "All Events", SM "Conf/BoR" and "Logout" are all you need to navigate! The rest of the screens are driven by buttons.

Setting up your account

Start at the **login** screen and use the Username (or email) and password provided.

Login Page

DeHoney.org ? ⚙ All Events   SM Conf / BOR   Login   Logout

UserName:* jdoe
Password:* •••••

submit

Click on the **gear icon** in the menu to open the profile page

DeHoney.org ? ⚙ All Events   SM Conf / BOR   Login   Logout   John Doe is logged in

Profile

Update your account profile or manage family members
The last login was:2017-08-22 17:00:28

Adjust the information to make sure everything is accurate and click **Update**.

Desired Username:* jdoe
Account Status: ☐ Currently Disabled?
☐ Admin Account?

Youth / Adult   Adult ▼
First Name:* John
Last Name:* Doe
My Phone: 585-555-2222
Birthday
(ex: 2002-11-31):
Email: johndoe@dehoney.org
Hint Question: not set
Security Answer: 123
Change
Password/PIN: Change PWD/PIN
Emergency Contact: Mary Doe
Contact Number: 585-555-1111

Update   Cancel

Edit Family Members

Bobby Doe

Mary Doe

Franky Doe

☐Add Family Member   New Family Member

Click the **Change PWD / PIN** (PIN not currently in use) button to change password

Enable Youth Account

NOTE: Enabling a Youth account should only be done by a parent or guardian responsible for the activities of a minor using the internet. By enabling the account, you are accepting the responsibility of the account and authorizing the minor to use it.

While in the Profile settings, select the youth account at the bottom of the form

Uncheck the **Currently Disabled?** Checkbox

Profile

Update your account profile or manage family members
The last login was:

Desired Username:*	fdoe
Account Status:	☑ Currently Disabled?
	☐ Admin Account?
Youth / Adult	Youth ▼
First Name:*	Franky
Last Name:*	Doe
My Phone:	585-555-1212
Birthday (ex: 2002-11-31):	
Email:	frankydoe@dehoney.org
Hint Question:	not set
Security Answer:	123
Change Password/PIN:	
Emergency Contact:	John Doe
Contact Number:	585-555-1212

Update   Cancel

Edit Family Members

Bobby Doe
John Doe
Mary Doe

When the check box is cleared, click **UPDATE** to save the record and make the account enabled.

Desired Username:*	fdoe
Account Status:	☐ Currently Disabled?
	☐ Admin Account?

Signing up for events

The basic concept of the system is to communicate your plans for an event. The system opens to a page listing the current events.

PRACTICE Go see it	Dec 31 / 5:00 PM	👀 / 0.00	1 / 1
PRACTICE Ceremony	Dec 31 / 5:00 PM	⚜ / 0.00	0 / 0
Practice Service	Dec 31 / 5:00 PM	✋ / 0.00	0 / 0
Practice Fundraiser	Dec 31 / 5:00 PM	💲 / 0.00	1 / 0
Practice Campout	Dec 31 / 5:00 PM	⛺ / 15.00	0 / 0

Show history   Off

Event Key   🏕 = Camping   ⚜ = Ceremony   💲 = Fundraiser   👀 = Go See It   ✋ = Service

Color Key   Available   Some Family   Signed up   Not Going

Note that the Show history button defaults to OFF, but you can toggle this to show historic events and reprint rosters or other utilities.

They are represented in the following ways.

Green Text   indicates that you are indicating participation

Red Text   indicates you will not be participating

Grey Text   indicates you have not indicated your intent, or you have released a time slot

Blue Text   indicates there is someone in your family that has indicated their intent.

The events are comprised of 2 types of signup styles:

Family Style

🏕 = Camping
🔭 = Go See It
✋ = Service

These three types of events represent your family at the top of the page with their current status. This is to make it easy to indicate each family members intent for attendance. The other group members who have indicated attending/ not attending are listed below your family

Fixed Position Style

⚜ = Ceremony
💲 = Fundraiser

These 2 types of events have position holders created to identify a set number of youth and /or adults needed for their Fixed signup items. Ceremonies use "Items" like "Ceremony Role" or "Drinks" or "Deserts". Fundraisers are based on time based "shifts" like "10AM" or "11AM". When signing up for these items, the system determines which youth are part of your family and makes them available to assign when an open youth position is selected. Adults are displayed when an open adult position is selected.

Both styles of signup prompt the user to confirm the emergency contact information *for that event* during signup. It is pre-populated with the default contact information from the profile page.

Signup Procedure for Family Style Events

After you login, you are brought to the **All Events** page, which will list the available events

Click on the event you wish to signup for. In this case we'll use the **Practice Campout.**

| PRACTICE -Campout | 5:00 PM / 2017-06-05 | 🏕 / 25.00 | 2 / 1 |

Note:

 The button is grey because none of the Doe family is signed up. The Campout start on 6/6/17 at 5PM. The cost is $25. There are 2 other youth signed up and one adult so far. Click the **Practice Campout** or other event. This brings up the Campout specific details.

PRACTICE -Campout

Event Type:	**Camping**
Start Date / Time:	**2017-06-05 / 5:00 PM**
Location:	**Camp Cutler**
Description:	**Rendezvous campout example**
	☐ SummerCamp
	☑ Tent
Days / Nights:	**3 / 2**
Cost:	**25.00**
Current Signup Youth/Adult:	**2 / 1**

Family

Youth	Adult
Bobby Doe	John Doe
	Mary Doe

Group

Youth	Adult
Conor C	Dan DeHoney
Alex D	

We can see additional information like the Campout location and a description of the campout. We also know this campout will not count as a long term campout, but will earn tent campout credit. It is 3 days and 2 nights long. We can see the count of 2 youth and 1 adult is verified by the green (disabled) buttons under the *Group* section. As the Doe family is all grey, none have indicated if they intend to go or not.

We also note the other participants are disabled buttons, because we can't change their signup status.

For COPPA compliance, youth names display only the first letter of the last name for those scouts who are not family.

Youth

Bobby Doe

Although we are logged in as John Doe John Doe is logged in . We can click on Bobby Doe to sign him up, which brings us to his *Individual Signup Page.*

Individual Signup Page

Sign up for an event

Name:	**Bobby Doe**
E-Contact Name:*	John Doe
E-Contact Number:*	585-555-1212
Paying With:*	Camper Fur ▾
Special Notes:	
	☐ SummerCamp
	☑ Tent

[Looks good - Ready to Go!]   [Not Going]

Here the default contact information has been loaded from his profile, but can be changed *for this event* without changing his defaults. An area for notes is available (like arriving late due to a game or concert).

Now its decision time! Selecting the Green button confirms the signup. The Red confirms that you will not be going. This need to decide going / not going is important to other attendees, so that they can plan groceries or other logistics for the event.

PRACTICE -Campout

Event Type:	*Camping*
Start Date / Time:	*2017-06-05 / 5:00 PM*
Location:	*Camp Cutler*
Description:	*Rendezvous campout example*
	☐ SummerCamp
	☑ Tent
Days / Nights:	*3 / 2*
Cost:	*25.00*
Current Signup Youth/Adult:	*3 / 1*

Family

Youth	Adult
Bobby Doe	John Doe
	Mary Doe

Group

Youth	Adult
Conor C	Dan DeHoney
Alex D	

Good news, we can now see that Bobby is going! The Youth / Adult count has gone up and Bobby's name is in Green.

Simply repeat the process for John and Mary.

This is the same process for *Go See It* events as well as *Service* events.

Return to the *All Events* page by using the menu bar. We can see there is now a family member that has responded, so the button for the campout turned Blue

PRACTICE -Campout

Signup Procedure for Fixed Position Events.
This is a very similar process as the Family style.

PRACTICE - Popcorn signu

Event Type:	**Fund Raiser**
Start Date / Time:	**2017-08-15 / 10:00 AM**
Location:	**Tim Hortons**
Description:	**Selling Popocron - PRACTICE EVENT**
Current Signup Youth/Adult:	**2 / 3**

10:00 AM

Youth	Adult
Youth Open	Adult Open
Youth Open	Adult Open
Youth Open	Adult Open
Alex D	Adult Open
	Dan DeHoney

11:00 AM

Youth	Adult
Youth Open	Adult Open
Youth Open	Dan DeHoney
Youth Open	
Youth Open	
Alex D	

12:00 PM

Youth	Adult
Youth Open	Adult Open
Youth Open	Dan DeHoney
Youth Open	

The differences occur in that Family members are not listed at the top of the page and you start by selecting the **Youth Open** or **Adult Open** positions that need to be filled.

This will bring you to a screen that prompts for the family member to be assigned.

Individual Signup Page

Sign up for an event

Youth Open <==>   Bobby Doe ▾

Assign this Family member

Note that the drop down filters the family members to match the type of position being filled.

Clicking the **Assign this Family member** will record Bobby in the desired location.

Before the signup is complete, we return to the screen to confirm the Emergency Contact Information.

Individual Signup Page

Sign up for an event

Name:	**Bobby Doe**
E-Contact Name:*	John Doe
E-Contact Number:*	585-555-1212
Special Notes:	
Hours:	1

Looks good - Ready to Go!

Release this signup

Again, the Green button confirms the information.

However, this time, the red button does NOT indicate you won't be participating, it only releases the Open position back for someone else to sign up.

After the signup is complete we are returned to the Event details listing

10:00 AM

Youth

Youth Open

Youth Open

Alex D

Bobby Doe

Here we can see that Bobby has signed up. His button is enebaled in case we need to update his signup record. There are 2 more positions open and Alex is also signed up.

Scoutmaster Conference and Board Of Review Signup

The Scoutmaster Conference and Board of Review workflow is a way to initiate and track your progress as you work to complete these two activities. The process follows the same key elements the paper process followed previously.

First, the scout makes sure all their requirements for a rank are complete, and then signs up for the conference process. This begins by using the menu selection for SM Conf/ BOR
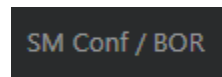
SM Conf / BOR

This opens the workflow screen with a single button available

DeHoney.org   ❓ ⚙   All Events   SM Conf / BOR   Login   Logout   John Doe is logged in

Scoutmaster Conference and Board of Review

Conference Progress

Request SM Conf / BoR

Click on the Request SM conf/BoR button

Bobby Doe ▾

Scout ▾

Signup

Select the Youth family member to request the Scountmaster Conference and indicate the Rank being discussed.

And that's it!

DeHoney.org   ❓ ⚙   All Events   SM Conf / BOR   Login   Logout   John Doe is logged in

Scoutmaster Conference and Board of Review

Conference Progress

Request SM Conf / BoR

Scout Name	Signed up	SM Conf	Board of Review	Archive
Bobby Doe / Scout	2017-08-28 21:57:41			

You've now signed up. When the scoutmaster indicates the Conference has occurred, the SM conference column will reflect the date it was completed and the Committee will begin scheduling the

Board of Review! All official rank advancement records are stored in scoutbook – this workflow is simply to track the activities and support their scheduling.

Additional Reporting

As needs develop, the system is intended to provide information that is useful to the users. Reports will be a solution for presenting the information in a useful format

1. Family Signups
   Your family has signed up for events, but with so many events and screens, it may be difficult to see all the currently signed up records. The Family Signups brings this information to one screen
   a. Simply click the Family Signups from the menu

| Family Signups					
Event Name	**Date**	**Time**	**Cost**	**Youth**	**Adult**
PRACTICE Go see it	2018-12-31	17:00:00		Franky Doe	
					Mary Doe
Practice Fundraiser		11:00:00		Bobby Doe	
Practice Campout		17:00:00	15.00	Bobby Doe	
			15.00	Franky Doe	
			15.00		John Doe
End of Roster					

   b.

Admin Guide

The Admin Section of the guide is to provide the direction on how to:

- Create and edit new Events
- Add place holders for events with fixed availability
- Adjust Attendance attributes of events
- Mark events paid
- Mark events as attended
- Mark Scoutmaster Conferences and board of reviews as complete

Most of the functionality in this section assume administrator privileges in the system. Admin's can enable the permission for other users.

Additional menu options (Admin & Tools) are available to Administrators and database transactions confirm the user is an administrator prior to execution of the command
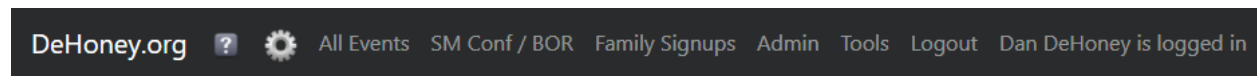
Create and Edit an event

1. Creating an event
   a. Use the Admin Menu option to open the Administrative screen

   # Event Administration

      i.

      Pick area to Administrate | OUTINGS | SIGNUPS

   b. Select OUTINGS, the type of NEW event to create and Edit Event

      Which Event: New Go See It TBD ▾ | Edit Event

      New Go See It TBD
      New Ceremony TBD
      New Service TBD
      New Fundraiser TBD
      i. New Campout TBD

   c. Complete all information in the form and submit

Event Administration

Event Type	Camping ▾
Event Type Label	Camping ▾
Event Name:*	New
Event Date (ex: 1992-11-11):*	
Event Start Time (ex: 17:00):	17:00
Location:	
Description:	
Signup Start Date (ex: 1992-11-11):	2017-10-10
Signup End Date (ex: 1992-11-11):	
Tent camping? (not cabin)	☐
Number of Nights	1 ▾
Number of Days	1 ▾
Extended camping? (Summer Camp)	☐
Cost:	$0.0000
Archive?	☐
Remove from Editting	
Update the record	UPDATE

        i.

       ii. This example is a camping outing, so options for Tent camping and Extended Camping are visible. These values set the defaults in the individual signups that get registered. Alteration of the signups is available in the signup section (if a scout attends a partial outing)

  2. Editing an Event

     a. Using the same process as creating an event, select the Existing event from the list

Which Event:	Long Name Test Cam ▾ Edit Event

New Go See It TBD
New Ceremony TBD
New Service TBD
New Fundraiser TBD
New Campout TBD
Practice Service 2018-12-31
PRACTICE Go see it 2018-12-31
Practice Fundraiser 2018-12-31
PRACTICE Ceremony 2018-12-31
Camping Bali 2017-12-31
Long Name Test Campout 2017-12-31

        i.

     b. Make changes and update as needed

Add placeholders to events

  1. Creating fixed availability events for Ceremony and Fundraiser style events

     a. Example: 5 people for snacks, 5 people for drinks OR 3 youth and 2 adults at 11AM

     b. Begin with the Admin menu option

        i. An event must be created before the availability can be assigned

       ii. Click on Signups to list the existing events, select the event and Edit Event

Which Event: [Practice Fundraiser 2(▼] [Edit Event]

Practice Service 2018-12-31
PRACTICE Go see it 2018-12-31
Practice Fundraiser 2018-12-31
PRACTICE Ceremony 2018-12-31

    iii.

c. A New event will have no existing entries

Add to an Item or NEW	Item or Time/Hours	Number of Youth	Number of Adults	Update	-
[ADD NEW ▼]	[ ]	[ ]	[ ]	[UpdateEvent]	-

[Mark All "Attended"]

Status   Name   Time   Youth/Adult   Hours   Update

    i.

d. Use the ADD NEW selection to add the groupings (11:00) or (Drinks)
e. Add the number of youth positions to be added in the category
f. Add the number of Adult positions to be added in the category
g. Click update event

Add to an Item or NEW	Item or Time/Hours	Number of Youth	Number of Adults	Update
[ADD NEW ▼]	[11:00]	[3]	[2]	[UpdateEvent]

    i.

h. Review the entries

Status	Name	Time	Youth/Adult	Hours
Open, Youth	[11:00:0] / [0]	☐ / ☐	[CF ▼] / ☐Paid	[UpdateRow]
Open, Youth	[11:00:0] / [0]	☐ / ☐	[CF ▼] / ☐Paid	[UpdateRow]
Open, Youth	[11:00:0] / [0]	☐ / ☐	[CF ▼] / ☐Paid	[UpdateRow]
Open, Adult	[11:00:0] / [0]	☐ / ☐	[CF ▼] / ☐Paid	[UpdateRow]
Open, Adult	[11:00:0] / [0]	☐ / ☐	[CF ▼] / ☐Paid	[UpdateRow]

    i.

i. Repeat the process for each grouping to be available in the Event
j. This creates the entries in the event (seen through All Events)

Practice Fundraiser

Event Type: **Fund Raiser**
Start Date / Time: **Dec 31 / 5:00 PM**
Location: **test**
Description:
Current Signup   **0 / 0**
Youth/Adult:

        11:00 AM

Youth   Adult

[Youth Open]   [Adult Open]
[Youth Open]   [Adult Open]
[Youth Open]

End of event

    i.

Update Signup information
During the management of an event or upon the completion of the event, updates can be made.

1. Adding a user to an event is done through the normal signup window.
   a. Administrators have extended lists to show all users
   b. Note: Users see only family and Users that have responded
   c. Select the desired user and follow normal workflow for signing up
2. After signup is complete, additional information can be modified
   a. Use the Admin > Signups utility to modify the selected outing
   b. Users that have responded will be listed

   i.
   c. Individual ROWS can be updated to modify the information

   i.
   d. When Marking Attendance on the campout, the "Mark All "Signed Up" and "Attended" will set all (and only) scouts marked as "Signed Up" to Attended. This is used to determine event history, and include in reports, Like OA eligibility.

Update Scoutmaster conference and Board of Review Workflow

The Scoutmaster Conference / Board of Review workflow does not have any "administrative" activities associated with it. The "Users" of the system require Administrator privileges and is therefore covered in this section

1. Users (who do not required Admin privledges) begin the workflow by selecting the Request Conference button in the SM Conf/BoR menu item.
   a. The Scoutmaster Conference Complete button appears when a conference has been requested

   b.
2. When the Scoutmaster has completed the conference, the date of the conference is entered

   a.
3. Completion of the SM conference enables the BoR Completed Button

Scout Name	Signed up	SM Conf	BoR
Bobby Doe / Tenderfot	*2017-09-18 13:26:26*	*2017-10-10*	BoR Complete

a.

4. Upon completion of the Board of Review, the Committee Chair records the BoR information

Scoutmaster Conference and Board of Review

Conference Progress

Date:

`2017-10-10`   BOR Signoff

Adult 1:

Adult 2:

Adult 3:

Scout Name	Signed up	SM Conf	BoR
Bobby Doe / Tenderfot	*2017-09-18 13:26:26*	*2017-10-10*	BoR Complete

a.

b. This includes the date and the 3 adults present at the BoR (often difficult to obtain later when submitting advancement information to council)

5. The completed workflow will remain in the list until and admin chooses to archive the record

Scout Name	Signed up	SM Conf	Board of Review	Archive
Bobby Doe / Tenderfot	*2017-09-18 13:26:26*	*2017-10-10*	*2017-10-10*	Archive X

a.

Privacy Policy

(pending Committee approval)

Summary:

The data in this system will only be used to support this unit signups and will not be distributed, sold or disclosed without prior approval.

Accounts are enabled upon creation for adults. Youth accounts must be enabled by an adult. Enabling a youth account is confirming your approval for authorizing the youth. The user that enabled the account is stored with the account.

The fine print

a. Online systems can vary depending on their use and the content to be gathered and / or published. Compliance with Federal, State, Local and Organizational laws, policies and guidelines is required. The following provides Unit guidance on the compliance for this unit
    i. Social Media: In compliance with open groups for public systems, the Unit will maintain an open group format to social media. Any Unit operated social media systems will have an administrator responsible for monitoring the account for compliance. Limiting personal information will be practiced by referring to individuals by first name only. Existence of posts by individual accounts to the Unit account that reference additional information disclosed by the personal account owner are the responsibility of the personal account owner and not governed by the unit moderator. (Ex. A Unit member posting from their own account to the unit account using their personal account with their full name. Such information was disclosed by the personal account owner and is therefore their responsibility)
    ii. Account based systems: Like BSA owned and operated system(s) like Scoutbook and scouting.org, with security accounts (username and password) may include additional personal identifiable information that is relevant to the system operation. Administrator(s) of these system(s) are responsible to not share the information with any other entity without express prior disclosure and consent by each individual account. Such instances should be rare, and relevant to the services provided by the system. COPPA compliance will be adhered to by requiring the parent or guardian to create and/or authorize any account for youth under the age of 13. Recommended approach for compliance it to create only adult accounts and allow for adult accounts to created linked youth accounts, thus providing consent via the act of account creation.