

INSTRUCTIONS FOR PRIVATE TOUR SCHEDULERS

Draft 3-25-15

Overview

You will now be able to enter new private tours yourself on the website, and make edits to any existing tours.

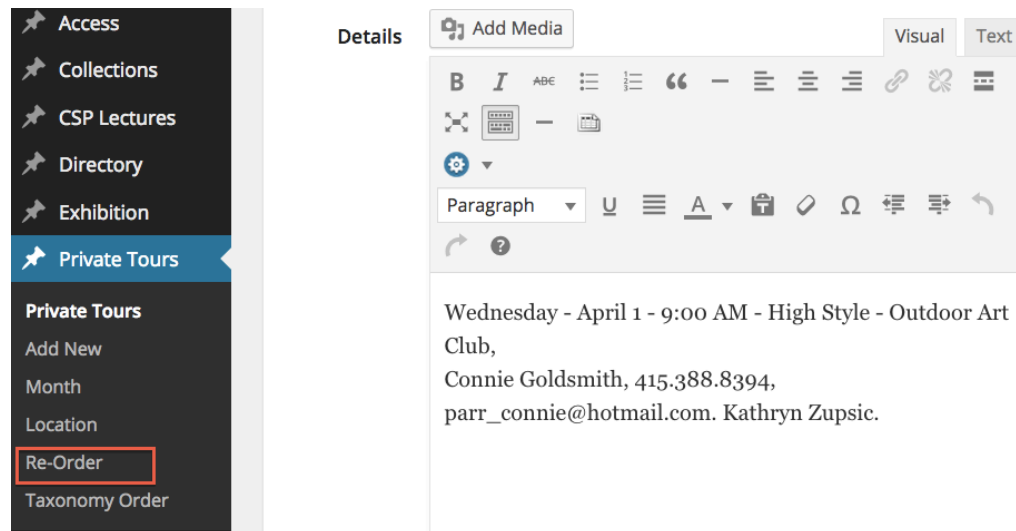
How to Create a New Private Tour

1. Log onto the website as a scheduler.
 - a. Open up a browser window and go to <http://famsfdocents.org/> (bookmark this page)
 - b. Log on. Username: **Password: (these are the ones sent to you by Leslie Latham).** You will see the dashboard for our site.
2. Return to the Home page of the website
 - a. In the dashboard, go to top left where you see an icon for HOME and FAMSF. Click **Visit site.**
3. Find Tours in the top navigation, select Private Tour Assignments
4. Scroll down to the bottom of the page, and you will see a form.
 - a. Enter a **TITLE - *Month & date - time AM/PM - Tour Name***
 - b. In the large text box, enter all the information for your tour. (Follow the format you see in the help text below the text box. **Bold** the docent name.)
 - c. Select Tour Month
 - d. Select Museum
 - e. Click **Submit.**
5. Now re-order the list of private tours (this program does not automatically place the new tours in calendar order).
 - a. Click on the link called **Re-Order the Private Tours**
 - b. You will see all the tours, for both museums, listed in chronological order. The tour you just created appears at the top of the list
 - c. Drag and drop the new tour into the correct chronological order
 - d. Click **Update.**
 - e. **NOTE:** the list of tours does not include the museum name. The WordPress system already knows which museum (from the box you checked), and will put it into the correct column.
6. Check your work by going to the end user view of the website
 - a. If you are in the dashboard, go to top left where you see an icon for **HOME** and **FAMSF.** Click **Visit Site.**
 - i. Navigate to the page you just changed
 - b. If you already have the page open on the end user view of the site, click refresh in your browser.

How to Edit An Existing Private Tour

1. Log on following steps 1, 2 and 3 above.
2. On the **Private Tour Assignments** page, next to each entry, you will see **>>.** Click here, next to the entry you want to edit.

- a. You will see a **TITLE** field, followed by a larger text field. Edit the text where appropriate.
 - b. If the **location** (Legion or dY) has changed you must also change the check boxes on the right of the page, checking the box for the museum where the tour will occur and **un**checking the box for the museum where the tour will not occur. When finished, scroll back up and click **UPDATE**.
 - c. If the **month** has changed, check the new correct month in the listing on the right side of the page and **un**check the old incorrect month.
 - d. If the tour has been **cancelled**, highlight the entire tour text entry in the text field and click on the small “strikethrough” icon (ABC) immediately above the text box. Then deselect the strikethrough icon and click on the “bold” icon. Type the word “CANCELLED” immediately after the lined through text. When finished, click **UPDATE**.
3. If the **month** has changed you must also **Re-Order** the entry.
 - a. In the left navigation, under Private Tours, find and click on **Re-Order**.

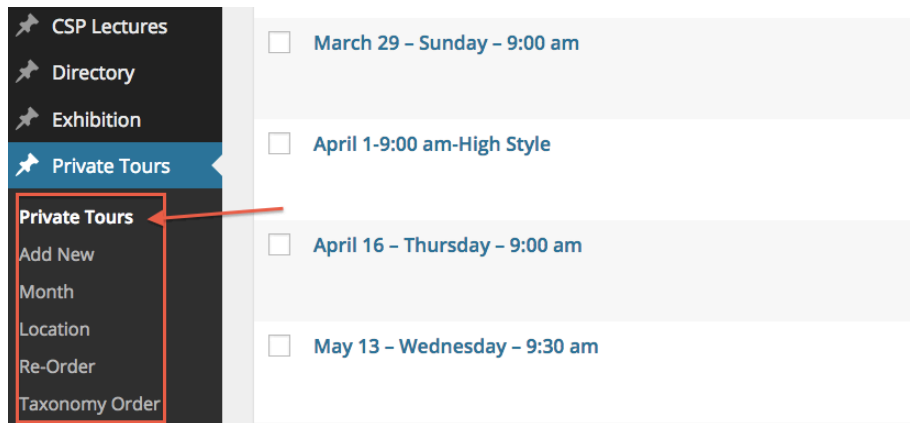


- b. The tour will be at the top. Drag it to place it in the correct chronological order.
 - c. Click **Update** at the bottom of the page. The system will confirm.
 - d. **NOTE:** the list of tours does not include the museum name. The WordPress system already knows which museum (from the box you checked), and will put it into the correct column.
4. Check your work by following step #6 above.

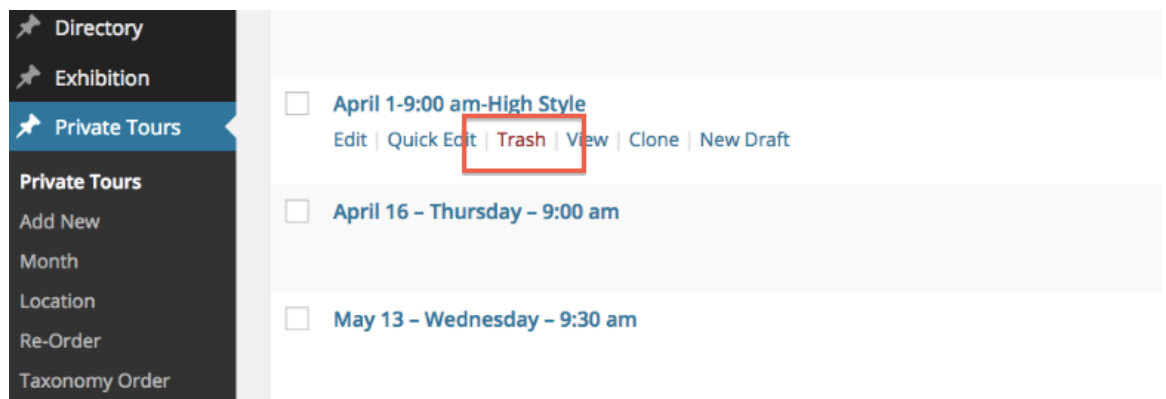
Monthly Maintenance – For the Private Scheduling Senior Editor

1. On a regular basis, the editor needs manually to delete Private Tours that have already come and gone. Because this is not a calendaring program, per se, the dates do not disappear automatically.
2. There are several ways to delete a Private Tour, but here is the way we recommend:

- a. Go to the **Dashboard** view of the website (see Steps 1a and 1b)
- b. On the left black navigation, look for the heading **PRIVATE TOURS** and the pin icon. Click on it to open the functions below. Select **PRIVATE TOURS** below the heading. This will open up a list view of each of the TOURS on your calendar.



- c. Move your cursor over the date (it's actually the title of your lecture) of the Tour you want to delete. Some editing options will appear, below the entry. Click Trash.



- d. The edit you made is automatically saved.
- e. To check your work, return to the end user view of the website.