

INSTRUCTIONS FOR DAILY SCHEDULERS Draft 12-12-15

Overview

There are two different ways to make these changes:

1. Individual entry editing
 - a. Use this technique for making 1-off tour changes
 - b. You can make multiple individual changes at a time.
 - c. This is also the easiest way to make quarterly changes.
2. Bulk uploading OPTIONAL
 - a. Use this technique to upload a quarterly schedule for each museum from your desktop to the website.
 - b. This is a little more complicated.

How to Make Individual Tour Changes - Individual Entry Editing

Let's say a docent wants to swap her *TUESDAY March 17* tour at the de Young, e.g. *S. Schroeder on 3/17, Around the World Cultures. Carol Selig* will replace her.

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: Scheduler Password: famsf**. You will see the dashboard for our site.
 - c. Return to the end-user view of the website by going to top left of page where you see an icon for **HOME** and **FAMSF**. Click **Visit site**.
2. Click on link for **Public Tour assignments**
3. Click on your day for the **Jan-Mar period e.g. Tuesday**
4. Scroll down the page and you will see all the cells for the table, with names assigned.
5. On the bottom left of this table, you'll see **EDIT**. Click here. You are now in the table for your day, just the de Young (each museum has its own table).
 - a. Scroll down to **Table Content** then look for S. Schroeder.
 - b. Make the change, then scroll up and click **SAVE CHANGES**. You will see a message confirming your success.
6. To check your work, go 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
7. Please confirm with the docent(s) doing the tour trade via email. "The tour trade has been posted." You might ask her/him to check it on the web to make sure it's correct.

How to Add Quarterly Tour Schedule - Via Individual Entry Editing

Let's say it's time to create your quarterly calendar - *Tues Apr-June* - for both museums for the website.

1. You will be emailed (6 weeks ahead of the quarter start) 2 templates in Excel already formatted for the period for your day for each museum (e.g. Tuesday, Apr-Jun 2015 deYoung)
 - a. Print them out, and use them as your scratch pad for assignments
 - b. You can also print them out directly from your scheduling page – as a PDF, .xls, or .cvs file.
2. When you have finalized the assignments, you are ready to enter them into website.
 - a. Follow steps 1 and 2 above (p. 1)
3. Go to the Public Tour Assignments-> future quarter (e.g Apr-June). Click on your day.
4. Scroll down the page until you see the end of the first table for the deYoung.
5. On the bottom left of this table, you'll see **EDIT**. Click here. You are now in the table for your day, just the de Young (each museum has its own table).
 - a. Click in each empty field to add the names to the website table.
 - b. Occasionally, save your work by scrolling up and clicking **SAVE CHANGES**. You will see a message confirming your success.
8. When you have finished, 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.
 - b. Navigate to the page you just changed

OPTIONAL - How to Make Quarterly Tour Changes – Via Bulk Uploading

Let's say it's time to create your quarterly calendar – **Wed Apr-June** - for both museums for the website.

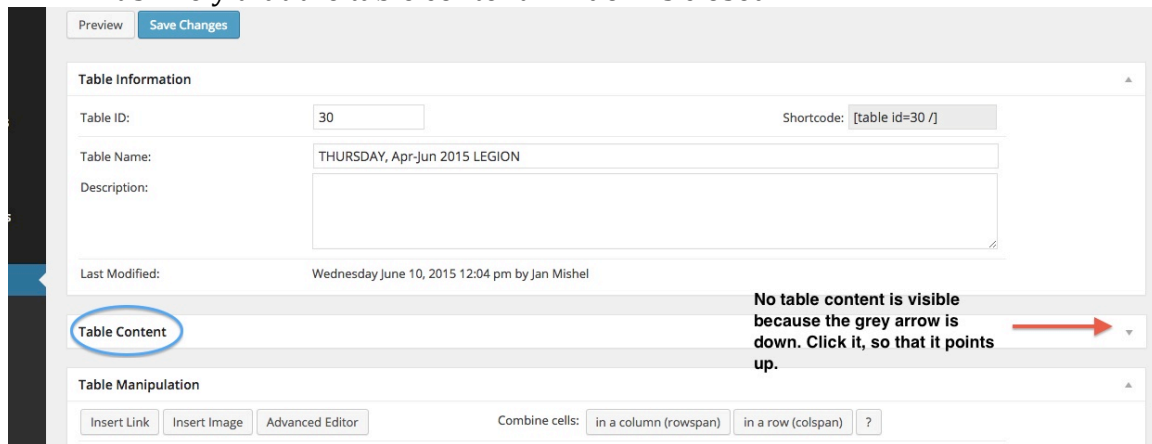
1. Follow steps 1 and 2 above.
2. On your desktop, transfer the final assignments from your print out to the 2 templates provided to you in Excel.
 - a. Each scheduler fills out 2 templates, one for each museum.
 - b. **NOTE:** Check that all the names for Special Exhibitions are in your spreadsheet and correct. The Special Exhibitions Scheduler is responsible for inputting names after Sign Ups, but you are responsible for NOT OVERWRITING the names already up on the website.
 - c. Once you've completed the assignments and entered them on the spreadsheet, **Save** the file (it is a **.csv** file, not as the standard Excel file format – .xlsx).
3. Now upload your Excel spreadsheets to the website – 1 for each museum
 - a. Log onto the website as a scheduler (follow step 1 page 1)
 - b. In the Dashboard, click on **Tablepress** in the left navigation.
 - c. You will see **IMPORT** at the top of the page. Click there.
 - d. Click **CHOOSE FILE**. Find the **Wed Apr-June 2015** file on your local drive. Click **OPEN**.
 - e. Select **REPLACE EXISTING TABLE**. All of the daily schedulers' tables will appear in a drop down menu.

- f. Select the file template you want to overwrite (e.g. **Tues Apr-Jun 2015 – Legion, or Tues Apr-Jun 2015 – dY**)
 - g. ****DO NOT REPLACE ANY FILE TEMPLATE OTHER THAN THE ONE FOR YOUR DAY, YOUR QUARTER****
 - h. Click **IMPORT**. Click **SAVE CHANGES**.
 - i. Repeat the process for the other museum.
4. Check your work
- a. Go to the end user view of the site <http://mmstudio.org/dev/famsf/>
 - b. Navigate to the Public Tour Assignments -> Apr-Mar, 2015 Tuesday link.

TROUBLESHOOTING – Table Content Not Visible for Editing

You click on edit, but when you get to the table editing screen, you don't see the table content you want to edit.

1. It's likely that the table content window is closed.



2. To open it, find the small grey arrow on the right side of the editing screen, across from table content. Click it to open the table.

