

HOW TO USE THE SIGN-UP TOOL IN USAONLINE

Updated 02/27/15

This how-to guide will demonstrate how to add, sign up for, and manage a meeting or scheduling office hours in the **Sign-up** tool in USAonline.

Adding a Meeting

1. Go to the **Sign-up** tool, and click **Add**.

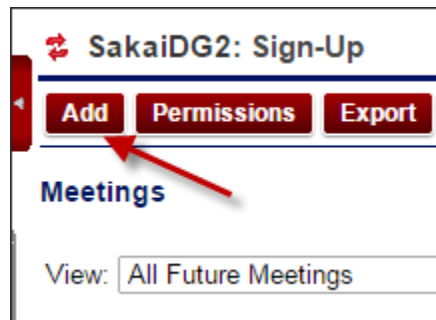


Figure1. The **Add** button

2. Provide a title and the location for the meeting. You can also select an organizer for the meeting, and include additional information by using the **Category** box, the **Description** rich text editor, and the **Add Attachments** button.

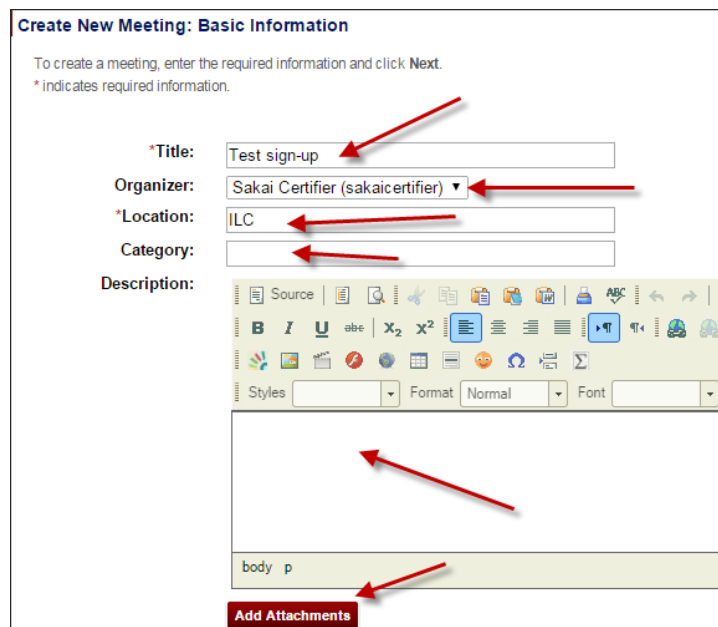
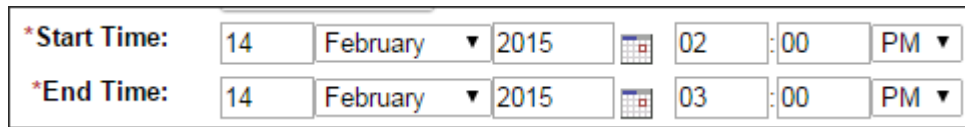
A screenshot of the "Create New Meeting: Basic Information" form. The form has a title "Create New Meeting: Basic Information" and a subtitle "To create a meeting, enter the required information and click Next." followed by a note "* indicates required information." The form contains several fields: "*Title:" with the text "Test sign-up"; "Organizer:" with a dropdown menu showing "Sakai Certifier (sakaicertifier)"; "*Location:" with the text "ILC"; "Category:" with an empty dropdown menu; "Description:" with a rich text editor containing a toolbar with various icons and a text area with the text "body p"; and an "Add Attachments" button at the bottom. Red arrows point to each of these fields.

Figure 2. Some basic meeting information

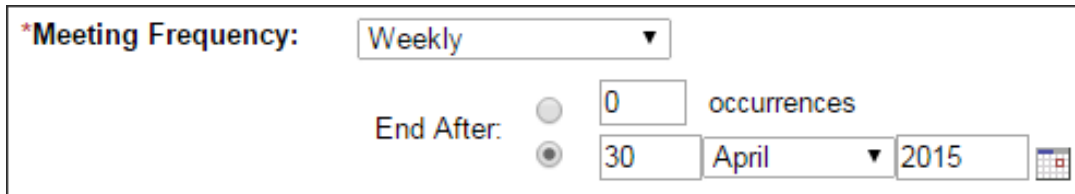
3. Select the **Start Time** and **End Time** for the meeting.



The screenshot shows two rows of time selection fields. The first row is labeled '*Start Time:' and contains a date picker set to '14 February 2015' and a time selector set to '02:00 PM'. The second row is labeled '*End Time:' and contains a date picker set to '14 February 2015' and a time selector set to '03:00 PM'. Each date picker includes a small calendar icon to its right.

Figure 3. Time settings for the meeting

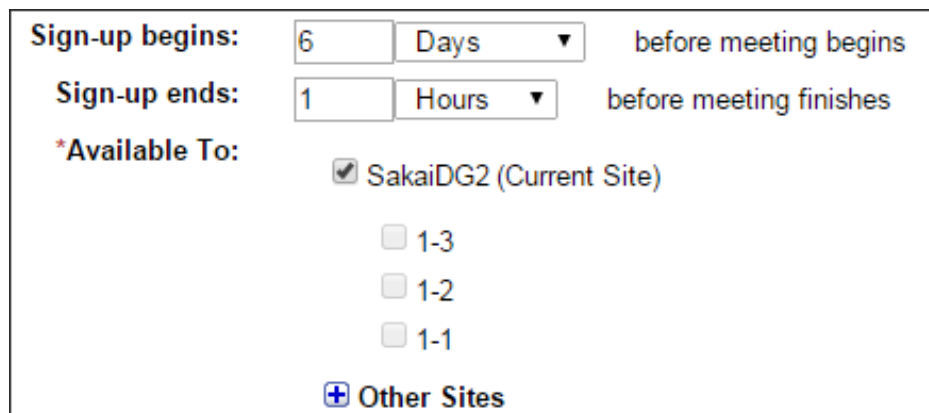
4. From the **Meeting Frequency** dropdown menu, select how many times the meeting will occur.



The screenshot shows the '*Meeting Frequency:' dropdown menu set to 'Weekly'. Below it, there are two radio buttons for 'End After:'. The first radio button is selected and is followed by a text input field containing '0' and the text 'occurrences'. The second radio button is unselected and is followed by a date picker set to '30 April 2015'.

Figure 4. Meeting Frequency settings

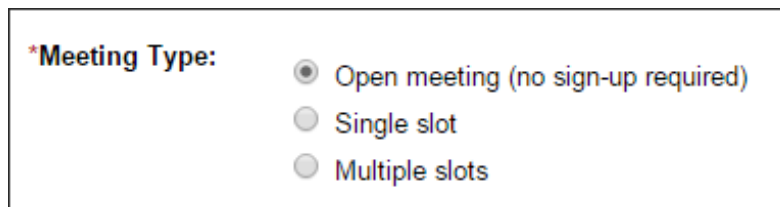
5. Determine the **Sign-up begins** time and **Sign-up ends** time, and set availability for specific groups in the current site or **Other Sites**.



The screenshot shows three sections of settings. The first section is 'Sign-up begins:' with a text input field containing '6', a dropdown menu set to 'Days', and the text 'before meeting begins'. The second section is 'Sign-up ends:' with a text input field containing '1', a dropdown menu set to 'Hours', and the text 'before meeting finishes'. The third section is '*Available To:' with a checked checkbox for 'SakaiDG2 (Current Site)' and three unchecked checkboxes for '1-3', '1-2', and '1-1'. At the bottom of this section is a blue plus icon followed by the text 'Other Sites'.

Figure 5. The availability information settings

6. In the **Meeting Type** section, select the meeting type.



The screenshot shows the '*Meeting Type:' section with three radio button options: 'Open meeting (no sign-up required)', 'Single slot', and 'Multiple slots'. The first option is selected.

Figure 6. The Meeting Type choices

7. If you select **Single slot**, you will be asked to enter a number for the **Max # of Participants**, or select **Unlimited number of participants**.

*Meeting Type:

- Open meeting (no sign-up required)
- Single slot
- Multiple slots

Max # of Participants

Unlimited number of participants

Figure 7. Single slot settings

8. You can also choose **Multiple slots**. In **Multiple slots**, if you want all slots to be of the same duration, enter the number of slots available for sign-up, as well as the number of participants per slot. The system will calculate the **Estimate duration per time slot** in minutes. **[NOTE: You may want to use Multiple Slots for office hours appointments.]**

*Meeting Type:

- Open meeting (no sign-up required)
- Single slot
- Multiple slots

Number of slots available for sign-up:

Number of participants per time slot:

Estimate duration per time slot (min):

Figure 8. Multiple slots settings

9. If you want to customize any or all of the slots, check **Advanced user-defined timeslots**, and click the **Create Timeslot(s)** link. The Define Custom Timeslots page will appear. You can customize each individual slot there, and you may also create additional slots by clicking **Add a new timeslot**.

Define Custom Timeslots

	Start Time	End Time	Max # Of Participants
X	14 February 2015 02:00 PM	14 February 2015 02:15 PM	1
X	14 February 2015 02:15 PM	14 February 2015 02:30 PM	1
X	14 February 2015 02:30 PM	14 February 2015 02:45 PM	1
X	14 February 2015 02:45 PM	14 February 2015 03:00 PM	1

[+ Add a new timeslot.](#)

Yes, publish the meeting as multiple calendar events in the Schedule Tool if adjacent timeslots are more than two hours apart.

Figure 9. The **Define Custom Timeslots** page

10. After that, click **Continue** to go back to the previous page, and then click **Next**.

11. On the **Meeting Summary** page, choose the desired settings, and click **Publish**.

The screenshot shows the 'Meeting Summary' settings page. The settings are as follows:

- Meeting Type:** Advanced user-defined timeslots
- Schedule Details:** [Show custom-defined timeslots](#)
- Available To:** SakaiDG2 (Site Level)
- Display Participant Names:** Yes, display names of participants to others.
- Receive Notification:** Yes, I want to receive email notification when a participant signs up or cancels an appointment.
- Announce Availability:** Yes, send email to notify all the potential participants.
 All potential participants Only Organizers
- Default Notification setting:** Yes, set 'Email Notification' Checkbox to checked as the default value across the meeting.
- Meeting Coordinators:** [Add/Edit](#) Coordinator(s) has the same rights as organizer to receive any email from attendee's activities.
- Other Default Settings:** [Show the other default settings](#)

Figure 10. Settings on the **Meeting Summary** page

12. Click **Publish**. Or if you have created a multiple-slot meeting and you want to assign participants to it, click **Assign Participants & Publish** to show the **Assign Participants** page. Click the **Add Participants** link, select a site participant from the dropdown menu, and click **OK**. Click **Publish** when you have added all the participants.

The screenshot shows the 'Assign Participants' page. The meeting details are:

- Meeting Date:** Saturday, February 14, 2015, 2:00 PM
- Meeting Frequency:** Weekly
- Repeats Until:** Thursday, April 30, 2015

Assignment options:

- Assign To All:** Yes, assign participants to the same time slot for all occurrences.
- Announce Availability:** All potential participants Only organizers and participants currently signed up

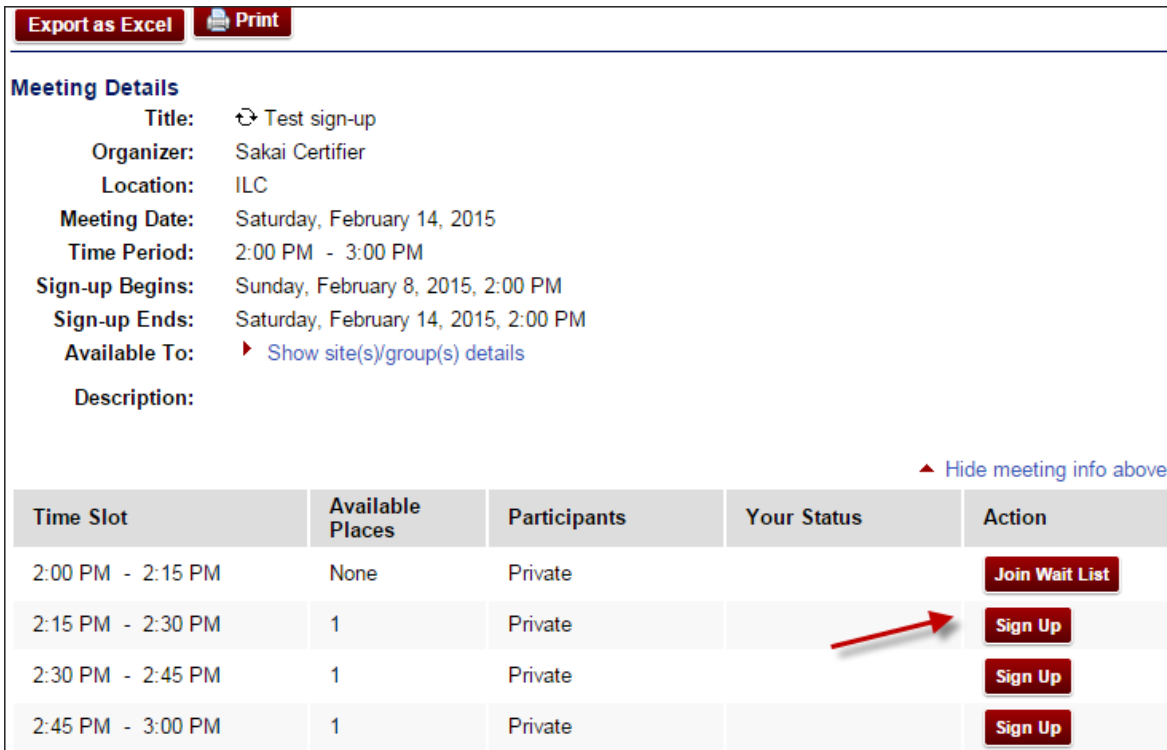
Time Slot	Max # of Participants	Participants
2:00 PM - 2:15 PM	1	Select a Participant <input type="button" value="OK"/> <input type="button" value="Cancel"/>
2:15 PM - 2:30 PM	1	<input type="button" value="Add Participant"/>
2:30 PM - 2:45 PM	1	<input type="button" value="Add Participant"/>
2:45 PM - 3:00 PM	1	<input type="button" value="Add Participant"/>

*Note: - If you click the **Back** button, all pre-assigned participants will be lost.
- Meeting organizer can assign greater than specified maximum number of participants, if desired.
- Click 'Publish' to finalize the meeting(s) creation process.

Figure 11. **Assign Participants** page

Signing up for a Meeting

1. To sign up for a meeting, please go to the **Sign-up** tool.
2. Find the appropriate meeting and click its title. The **Meeting Details** page for that particular meeting appears. Click the appropriate **Sign Up** button.

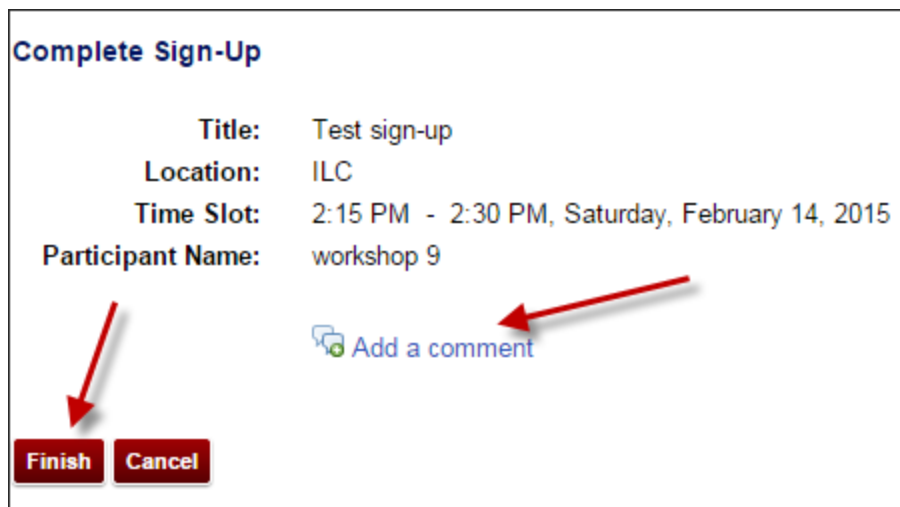


The screenshot shows the 'Meeting Details' page for a 'Test sign-up' meeting. At the top, there are buttons for 'Export as Excel' and 'Print'. Below the title, the meeting details are listed: Organizer: Sakai Certifier, Location: ILC, Meeting Date: Saturday, February 14, 2015, Time Period: 2:00 PM - 3:00 PM, Sign-up Begins: Sunday, February 8, 2015, 2:00 PM, Sign-up Ends: Saturday, February 14, 2015, 2:00 PM, and Available To: Show site(s)/group(s) details. A description field is empty. A link to 'Hide meeting info above' is visible. Below the details is a table with columns: Time Slot, Available Places, Participants, Your Status, and Action. The table has four rows of time slots, each with a 'Sign Up' button. A red arrow points to the 'Sign Up' button for the 2:15 PM - 2:30 PM slot.

Time Slot	Available Places	Participants	Your Status	Action
2:00 PM - 2:15 PM	None	Private		Join Wait List
2:15 PM - 2:30 PM	1	Private		Sign Up
2:30 PM - 2:45 PM	1	Private		Sign Up
2:45 PM - 3:00 PM	1	Private		Sign Up

Figure 12. The Sign Up button

3. When the Complete **Sign-Up** page appears, review the information, **Add a comment** if you like, and click **Finish**.



The screenshot shows the 'Complete Sign-Up' page. It displays the meeting details: Title: Test sign-up, Location: ILC, Time Slot: 2:15 PM - 2:30 PM, Saturday, February 14, 2015, and Participant Name: workshop 9. There is a link to 'Add a comment' with a speech bubble icon. At the bottom, there are two buttons: 'Finish' and 'Cancel'. A red arrow points to the 'Finish' button, and another red arrow points to the 'Add a comment' link.

Figure 13. The **Add a comment** link and the Finish button

4. The **Meeting Details** page appears again, and you will see **Your Status** is **Signed Up** for that particular meeting or slot. You can click the **Cancel Sign-up** button to cancel it.

Time Slot	Available Places	Participants	Your Status	Action
2:00 PM - 2:15 PM	None	Private		Join Wait List
2:15 PM - 2:30 PM	None	Private	Signed up	Cancel Sign-up
2:30 PM - 2:45 PM	1	Private		Sign Up
2:45 PM - 3:00 PM	1	Private		Sign Up

Back

Figure 14. The signed up status and the Cancel Sign-up button

NOTE: If you are signed up for a time slot that has been locked, you will not be able to sign up again for that slot if you cancel the sign-up.

5. Click the **Back** button or the reset icon to return to the Sign-up home page.

Managing a Meeting

1. To manage a meeting you have created, go to the **Sign-Up** tool, and click the name of the meeting you want to work on. The **Meeting details** page for that meeting will appear.
2. You may view information and settings for the meeting. Also, you can **Modify** the meeting, **Copy** it, **Export it as Excel**, and **Print** it by clicking appropriate buttons on the top.



Figure 15. The buttons to manage the meeting

3. You can download the meeting in iCal format by clicking the **Download** link.

Meeting Details


Title: ↻ Test sign-up
Organizer: Sakai Certifier
Location: ILC
Category:
Meeting Date: Saturday, February 21, 2015
Time Period: 2:00 PM - 3:00 PM
iCalendar link:  [Download](#)
Sign-up Begins: Sunday, February 15, 2015, 2:00 PM
Sign-up Ends: Saturday, February 21, 2015, 2:00 PM
Available To: ▶ [Show site\(s\)/group\(s\) details](#)
Description:

Figure 16. The **Download** link

4. You can lock or delete a time slot for the meeting by clicking the title of the meeting and then clicking the **Lock** or **Cancel** link for the slot.

Email Notification: Yes, send email to notify the related participant(s) about the changes that have been made. [▶ Hide meeting info above](#)












Time Slot	Max # of Participants	Participants	Wait List
2:00 PM - 2:15 PM  Lock - prevent participant sign-up  Cancel - delete the timeslot	1	   workshop 10  Add Participant	 Add Participant
2:15 PM - 2:30 PM  Lock - prevent participant sign-up  Cancel - delete the timeslot	1	 Add Participant	 Add Participant

Figure 17. The **Lock** and **Cancel** link

5. You can add a participant to a time slot or wait list. You can also edit, delete, and email a participant, too.








Time Slot	Max # of Participants	Participants	Wait List
2:00 PM - 2:15 PM	1	   workshop 10  Add Participant	 Add Participant
2:15 PM - 2:30 PM	1	 Add Participant	 Add Participant

Figure 18. Icons that you can click to manage participants

***For further assistance, contact the Innovation in Learning Center at (251) 461 - 1888.**