Roster Management Guide

Administrator Access

You can upgrade any existing contact to an administrative role or create a new administrator from scratch.

Assigning Access to an Existing Contact

1. Navigate to the **Contacts** tab.
2. Search for the contact by name and select them from the list.
3. Use the **Admin Level** dropdown menu to select the appropriate permission level.

Adding a New Administrator

1. Click the green **Add** button in the **Contacts** section.
2. Select **Admin...** from the options.
3. Fill in the required contact information.
4. Set the **Admin Level** using the dropdown menu.

> **Note:** New administrators will be prompted to create their own password the first time they log in.

Administrative Permission Levels

Each level provides a different degree of control over the account:

Admin Level	Capabilities
Appointment Viewer	Can log in to the Admin UI and view reports/schedules but cannot make any changes.
Appointment Maker	Can book appointments from the Admin UI but cannot change the setup or modify time slots.
Resource Administrator	Can make/cancel appointments and add/remove slots for specific assigned resources (e.g., specific teachers).
Event Administrator	Acts as a full-power administrator for one or more specific events.
Administrator	Full-power access to the entire account and all settings.

Configuring Access Restrictions

For most roles, you must specify exactly which teachers or events the user is allowed to manage. All administrative levels include the ability to view reports.

Assigning Teacher (Resource) Access

For **Appointment Viewers**, **Appointment Makers**, and **Resource Administrators**, you must define their specific scope:

- Go to the **Vendor Access** tab.
- Use the **Resource Access** block to select the specific teachers or resources this contact can manage.

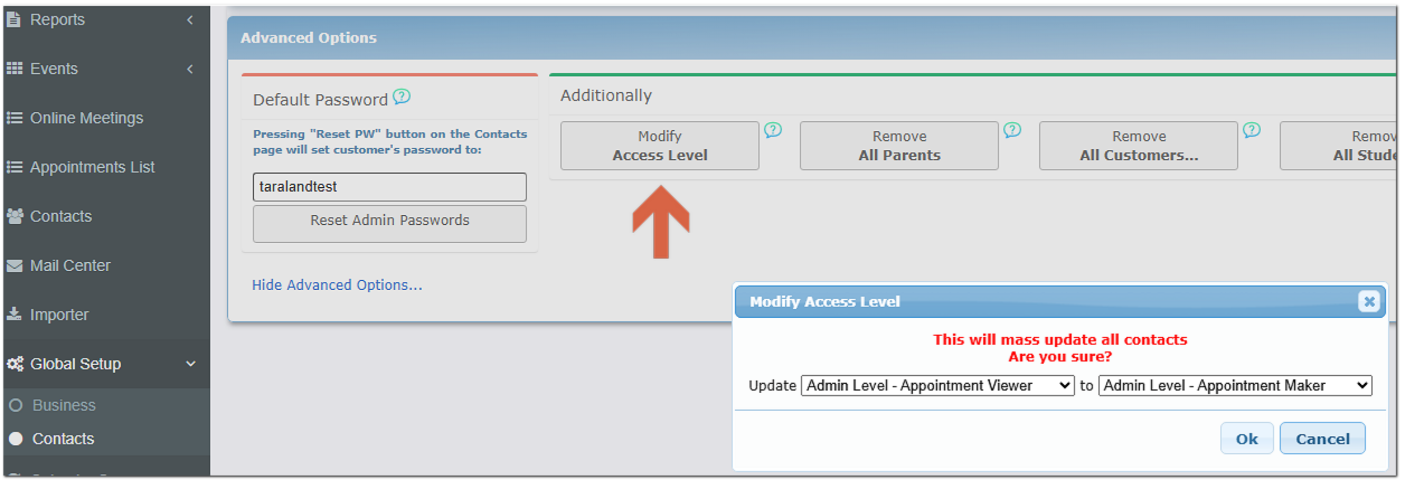
Assigning Event Access

For **Event Administrators**, you must specify which events they can oversee:

- Go to the **Vendor Access** tab.
- Use the **Event Access** block (located in the lower right-hand table) to grant access to the appropriate events.

To update multiple Admins

To update groups of Admins to higher (or lower) levels, go to **Global Setup/Contacts** and under Advanced Options / Additionally select the Modify Admin Level button.



Manage Contacts

The **Contacts** tab serves as a central directory for everyone who interacts with your account. A participant’s information is automatically saved here as soon as they log into the online scheduler for the first time.

Searching for Contacts

By default, participant names do not automatically populate in a list. To find a specific person:

- Navigate to the **Contacts** tab in the top navigation bar.
- Use the **Search Control** list to search by **Last Name**, **First Name**, or **Email Address**.
- *Note:* You can also search by any custom ID fields you have configured on the **Global Setup / Contacts** page.

Adding and Removing Contacts

- **To Add:** Click the green **Add** button and fill in the required fields.
  - *Important:* If you receive an error regarding a duplicate email address, the system will flag the record in **red**. You should delete the duplicate record to avoid system errors.
- **To Delete:** Select the contact from the list and click the **Delete** button.

Contact Details and Tools

Once a contact is selected, their information will appear in the panel on the right. You can navigate through several specialized tabs to manage their profile:

Contact Info

Displays the user's primary details, including Email, First/Last Name, Admin Level, and Customer Access Rights. Any custom data fields collected during registration will also appear here.

Appointments

This tab (internal to the contact record) displays a complete list of all appointments associated with this specific person.

Log

A historical record for the contact, showing:

- Timestamps for when appointments were booked or canceled.

- A record of all automated and manual emails sent to them.

Vendor Access

Used specifically for staff, this tab allows you to define which events or resources an administrator has permission to manage.

Password Management

If a participant or administrator forgets their password, you can reset it manually from their contact record.

- **Resetting:** Click the **Reset PW** button.
- **Result:** This reverts their password to the account's **Default Password**.
- **Configuration:** To view or change what the default password is, navigate to the **Global Setup / Contacts** page.

Directions for Participants

Please follow the link provided by your organization to access the Online Scheduler. Once you have reached the site, follow these steps to book your appointment:

1. Sign In

- **Enter Email:** Type your email address and click **Next**.
- **Returning Users:** If you have used the system before, you will be prompted to enter your password.
- **New Users:** If your email is not recognized, simply follow the prompts to **Sign Up** and create your profile.

2. Select Your Event

Once logged in, you will see a list of available events. Click on the specific event you wish to join (e.g., "Fall Conferences" or "Summer Camp").

3. Register or Book Your Slot

- Fill out all required fields in the registration form.
- Click the **Register** or **Sign Up** button at the bottom of the form to finalize your booking. You will receive a confirmation email shortly after.

Managing Your Schedule

If you need to review your bookings or make changes, you can do so directly from your account.

View or Print Your Itinerary

To see a clean, printer-friendly list of all your appointments, click **Printable Schedule** on the left-hand sidebar.

Changes & Cancellations

If you are using a Computer (Desktop):

1. Click **My Appointments** on the left-hand sidebar.
2. Locate the appointment you wish to change.
3. Hover your mouse over the appointment to reveal the **Details**, **Edit**, and **Cancel** options on the right.

If you are using a Mobile Phone:

1. Tap the **Menu Icon (three bars)** in the top-left corner.
2. Select **My Appointments** from the menu.
3. Tap the **three dots (⋮)** next to any appointment to modify or cancel your booking.

How to Add/Register a Participant to the Roster Event

Manually Adding Participants to a Roster

There are two primary ways to add a person to your event roster, depending on whether you need to create a new contact or simply search for an existing one.

Method 1: Using the Add User Icon

1. From the **Admin UI**, open your event and navigate to the **Roster Editor** tab.
2. Click the **Add User icon** (the person icon with a plus sign) located above the participant list.
3. In the **Select Person** window, choose one of the following:
    - **Option A: Search for an Existing Contact**
        - Type the participant’s name in the search bar on the left.
        - Select the correct name from the results.
        - Verify the details on the right and click **OK** to finalize.
    - **Option B: Create a New Contact**
        - If the person is not in your database, enter their **First Name**, **Last Name**, and **Email Address**.
        - Click the green **Add** button.
        - Click **OK** to create the contact, and then **OK** again to confirm their enrollment.

Method 2: Quick Enrollment Field

If you know the participant already exists in your account database:

1. On the **Roster Editor** tab, locate the **Enroll Participant** entry field.
2. Begin typing the name in your account's specific format (e.g., "Last, First" or "First Last").
3. Once the matching name appears, press the **Enter** key to instantly add them to the roster.

Managing Roster Entries

Once a participant is on the list, you can modify their details or remove them if their plans change.

Editing Registration Details

Admins have the authority to update information provided during the initial sign-up.

1. Select the participant’s name from the list on the **Roster Editor** tab.
2. On the right-hand panel, you will see the **Appointment Fields** that were filled out during registration.
3. Edit the fields as needed; the changes will be saved to their registration record.

Canceling a Registration

To remove someone from the event:

- Locate the participant on the **Roster Editor** tab.
- Click the **Red X** next to their name.
- ***Note****:* This removes the participant from the roster but does not delete their contact information from your general database.

Reports

When you first log in to your account from the pickAtime home page, you will be in the Admin tool and will default to the **Event Reporting** page within the Admin tool. Reports are divided into two categories: **Event-Specific** and **Account-Specific**.

Event Report

To view data for a single event, use the **Event** dropdown to select your Roster event.

Participant List

This report provides a comprehensive list of all individuals who have registered for the selected event, including any data entered during the sign-up process.

Managing Reports

For every report generated, you have the following options:

- **Format:** Print, Export to XML, or Export to a Tab-delimited file (Excel compatible).
- **Email:** Send the report directly to yourself or others.
- **Save Settings:** If you customise a report (e.g., by adding "Additional report fields"), click **Save Report Settings**. The system will remember these preferences the next time you run the report.
- **Automated Delivery:** Administrators can click **Schedule Report Delivery** to set a date range, time of day, and frequency for automated email delivery.

Save Report Settings

There is also an option on any report to save the settings for that report. For example, if you add additional fields to your report, such as the email address of the participant, you can now add these fields and then select the Save Report Settings button, and your new selection will be saved. The next time you return to this report, you will see the additional fields displayed.

Account Specific Reports

To access these, toggle the view to **Account Reports** mode. These cover data across your entire vendor account.

You will have the option of the following reports:

Settings

The Settings report will list the URL that was automatically created for your online scheduler.

Account - Invoices and Payments

This report will display the balance on your account. It will also list your invoices and payments. You can click on an invoice # to see the invoice. On any invoice page, you will have the option to pay by credit card.

Problem Appointments

If there are any "problem appointments" on your account, this report will provide you with a list of these appointments. A "problem appointment" is an appointment that has been placed "on hold". For example, if you delete a slot that had an appointment on it, the appointment is not automatically deleted. The appointment is tagged as a "problem appointment", and you must decide what you will do with this appointment.

Appointments from all events

This report will display a list of all appointments from all your events.

Appointments for all Roster events

This report will display a list of all appointments from all Roster events.

Contacts without appointments

This report will display a list of all the contacts that have logged into your account and have not booked an appointment. The "Contact's fields" link is available on this report to add contact information (ex. email address) to your report.

List of Admins

This report will display a list of your admins. It will show you the email address that was imported, as well as the Access Level provided to each admin. When teachers are imported, they are automatically given Appointment Viewer access, and this report will also show you the resources (teacher names) that each teacher has access to. To see when your admin(s) last logged in, click the green “Additional Fields” button and then select “Last Logged In.”

% Full

If you have multiple events, this will show you the percentage of booked slots out of the total available slots.

Cancelled Appointments

This report lists all cancelled appointments, the date and time the appointment was cancelled, and the email address of the Contact Person who cancelled the appointment.

Appointment Counts for all Events

This will provide you with the total appointment counts for all your events.

Resource Mapping

This report shows all the Resources on your events and the contacts (if any) associated with each Resource. For Parent Teacher Conference scheduling, this will allow you to check the connection between assigned contacts (teachers) and Teams.

Parents without Students

This report displays a list of parents who are not associated with any students.

Students without Parents

This report displays a list of students who are not associated with any parents.

Parent-Student Relationship

This report displays a table showing the association between parents and students.

Scheduled Report Delivery

This report displays the details of your Scheduled Report Delivery settings. This shows the reports you have scheduled for delivery, what the time period is for those reports, who the report is going to, the interval frequency of the report, and when the report was last sent. You can also cancel the Scheduled Report Delivery from here by selecting the delete option next to the report.

Appointments Summary by Contacts

This report allows admins to see appointments booked by contact(s) on all events across the Vendor account.

Sending Custom Emails to Participants

The **Appointments List** is the primary tool for managing communications for a specific roster event. This page allows you to send bulk messages or target specific individuals.

1. Filter Your Recipient List

- **Navigate:** On the Admin UI sidebar, select **Appointments List**.
- **Set Filters:** * Check the **All Appointments** box.
  - Select your specific roster event from the **Event** dropdown menu.
- **Search:** Click the **Search** button to generate the list of registered participants.

2. Launch the Email Tool

Click the **Send Email** button at the top of the page. You will be prompted to choose your audience:

- **Send to All:** Sends the message to every participant currently visible in your filtered list.
- **Send to Selected:** Only sends the message to the individuals you have manually checked in the list.

3. Configure Your Message

A **Send Email** window will appear with the following options:

- **Email Type:** Toggle between a **Reminder/Follow-up** email or a **Custom** email.
- **Content:** You can use your pre-configured email template or override it with a unique message for this specific send.
- **Template Management:** To view or edit your default templates permanently, navigate to the **Settings / Notification Setup** page for that event.