

# **WorkSource Online Event Calendar Editor Training**

## Contents

<i>Contents</i> .....	2
<i>Introduction</i> .....	3
Training objectives:.....	3
Training structure and format.....	3
Screen captures.....	4
The Online Event Calendar .....	4
The Editor role.....	4
Login to Trumba .....	5
Change a password.....	6
The Editor Calendar view .....	7
Add events to the calendar using templates.....	8
Choosing a template.....	10
Adding information to an event template .....	12
Saving and publishing an event .....	15
Add a Registration form to an event .....	16
The Participant Registration Form .....	19
Event registration evidence .....	20
Enter a recurring event.....	21
Repeating patterns.....	22
Editing an event .....	24
Customer Registration confirmation .....	25
Public Facing Calendar View .....	26
Additional Information about browsers and cache' .....	29

## Introduction

Welcome to the WorkSource online event calendar! The purpose of the event calendar is to provide a professional and consistent public advertisement of our WorkSource services. The calendar is customer focused.

The following training material covers the role and actions of the Editor in the Trumba software.

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### Training objectives:

Upon completing this training web session, participants will be able to:

- Describe the purpose of the Online Event Calendar
- Describe their role as a calendar Editor
- Describe how to login and out of the calendar and change a password
- Describe the Editors view of the calendar
- Add an event to the calendar
- View the added event on the public calendar
- Add a registration web form to a calendar event
- Add a recurring event on the calendar
- Edit an event on the calendar
- Navigate the views of the public calendar
- Web browser differences ,cache, refreshing

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### Training structure and format

This document uses small icons to illustrate the action you, the editor of the calendar can complete and what the calendar displays does in response.

The icons are as follows:



Editor action



Calendar web page display

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## Screen captures

This document utilizes screen captures to illustrate displays, buttons, links and menus and the actions to take on the page.

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## The Online Event Calendar

The online event calendar is a product designed by the Trumba Company and customized for use by WorkSource. The calendar makes most all of the workshops, hiring events, job fairs, job clubs and computer lab times in WorkSource centers and affiliates across the state viewable by the customer from any location on any device with internet access.

Events are displayed when the customer clicks on the online event calendar through Go2WorkSource.

Entries and updates to the calendar are accomplished by a designated calendar editor. The editor has permissions in the software to use templates to enter, modify and cancel events for their area. All events are rolled up in a statewide calendar and can be displayed for local areas using filters. The filters enable the customer to select a particular geographic area and see what is available to them.

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## The Editor role

Editor account permissions in the Trumba product allow the account holder to add, to modify, to cancel and to delete events from any calendar that is associated with that editor account. One editor may have more than one calendar associated with their account. Calendar associations are assigned by the Publisher role which resides in the Information Technology Services Division of the Employment Security Department. An Editor must adhere to standards for the calendar and stay within established branding guidelines and procedures.

The role of the Publisher is to monitor calendar content and alert editors when content falls outside the guidelines.

### Individual Accounts

Editors are assigned as individuals and are authenticated in the Trumba product by an email address and a password. Due to ESD security policies, accounts cannot be assigned to a location and shared with multiple users. The editor and a back-up editor are the only individuals authorized to use an editor account.

## Content and the customer experience

Editors are responsible for content entered on the online calendar. This calendar is viewable just like any website on the internet. The customer experience is the primary focus of the content of any event on the online calendar so it is important that the customer can understand what is being offered to them.

### *Here are some tips for creating customer friendly events*

- Avoid state agency or workforce system jargon and acronyms (such as DVR for Division of Vocational Rehabilitation or UI for unemployment insurance )
- Avoid using symbols or images which may have relevance to a local area staff members but no significance to the website viewer.
- Write content in complete sentences which clearly explain the event and any expectations of the customer.
- Check and re-check content for faulty formatting, typos or misspelled words. Trumba does NOT have a spell or grammar check feature.

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## Login to Trumba



Log into the online event calendar by typing the web address that your administrator [www.Trumba.com](http://www.Trumba.com) has given you into your Internet Explorer address bar, and then press **Enter**. Click the **Sign-in** button on right top of the page.



Online event calendar displays the Trumba Login page.

Sign In

**TRUMBA®**

Sign In

**SIGN IN USING YOUR TRUMBA EMAIL ADDRESS AND PASSWORD**

Email address:

Password:

☐ Automatically sign me in on this computer

**Sign In**

Forgot your password? [Request a reset email](#)



Type your Email address and your password in the Password box

(Note: You were provided a password when your account was created.  
You can change the password using Account Settings.)



Click on **Sign In**

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## Change a password



Login to Trumba.com

The editor's view of the calendar will display. At the top left side of the page is a link; [Account Settings](#).



Click on the [Account Settings](#) link



Account information is display

Trumba

Signed in as Sue Feist | Publisher Dashboard | Account Settings | Address Book

### Account Settings for Sue Feist

[Return to editor10's calendar](#)

**REQUIRED ACCOUNT INFORMATION** ? OK

Email address:

Display name:

Password: [Change my password](#)

Time zone:    
Also change the time zone of: ☐ calendars whose time zone is Pacific Time ☐ all my calendars

Email options: [View/edit settings for Trumba email you want to receive](#)

**MAIN CALENDAR VIEW OPTIONS**

When changing calendars: ☐ Keep the same date ☐ Keep the same layout

**SUBSCRIPTION INFORMATION**

Subscription type: Trumba Connect (Editor) - Year Subscription

Expiration: 1 September 2013 333 days remaining

**SECURITY SETTINGS** ?


Use secure protocol for: ☐ All web pages Check to ensure all communication with Trumba Connect is secure.

OK Cancel



Click on the [Change my password](#) link


Enter and confirm a new password

 Help: The Trumba Company has built in a robust Help feature that can assist the Editor. Help is available at the page and at the field level for many input fields.

## The Editor Calendar view



Trumba will display the Editor View of the calendar after login



The screenshot shows the Trumba Editor Calendar view for October 2012. The interface includes a top navigation bar with 'Events' and 'Images' tabs, a 'Published at: esd1wbolydev1' status, and buttons for 'Add Event' and 'Print'. Below this is a calendar grid showing events for each day of the month. On the left side, there is a 'Left hand Navigation' panel with sections for 'CURRENT PUBLICATION' (showing 'WorkSource Spokane'), 'CALENDAR TASKS' (with options like 'Create a new calendar', 'Manage your calendars', 'Import calendar events', and 'Export this calendar'), and 'OTHER TASKS' (with options like 'Manage images' and 'Registration report'). Annotations with arrows point to specific features: 'Add Event' points to the top button, 'Click the down arrow or link to edit an event on the calendar' points to a downward arrow on a calendar day, 'Click to create a spreadsheet with all event data on this calendar (minus registration data)' points to the 'Export this calendar' link, and 'Click to display a registration spreadsheet of all registered participants' points to the 'Registration report' link.

The page displays all the events on your calendar. You can look at different views by making a selection from the **View** choices at the top left side of the display. (Day, 3 Day, Week, 5 Week Month or List) It also allows the editor to advance the months displayed by using the back and forward arrows on either the thumbnail or larger view.



At the top of the editor's calendar view there are buttons for two actions to **Add Event** and **Print**.

The **Add Event** button (covered in Add Events section of this document)

The **Print** button creates a PDF of the page you are viewing.

(Note: The Print button behaves the same way on every page that the Print function is displayed)

The page also displays actions using the left hand navigation display under **CALENDAR TASKS**. At this time the only action we will use is the **Export this calendar**.



Click on [Export this calendar](#) to generate a report of all the events associated with the calendar. The report will be produced in a .csv file and can be saved as an Excel spreadsheet. If an editor has more than one calendar association, the report will contain all the events from all the associated calendars.

(Note: Only events are available on this report. No registered participant data will display)

The page also displays actions under the heading **OTHER TASKS**. At this time the only action we will look at is the [Registration report](#)



Click on [Registration report](#) to generate a report of all the registered participants associated with the calendar. You can choose date parameters to limit the number of registrants for a specific time period. The report will be produced in a .csv file and can be saved as an Excel spreadsheet. If an editor has more than one calendar association, the report will contain all the registration data from all the associated calendars.

(Note: Participant data can be manipulated within Excel)

The editor calendar view also contains title links to each event listed on the calendar.



Clicking on the title link will open an existing calendar event for viewing and/or editing. The **down arrow** to the left of the title also allows the editor to choose other methods to modify an event

The check box ☐ to the left of the down arrow allows the editor to choose one or more events on which to take action. The editor can click on the box and use the drop down menu at the top of the table to choose the appropriate action.

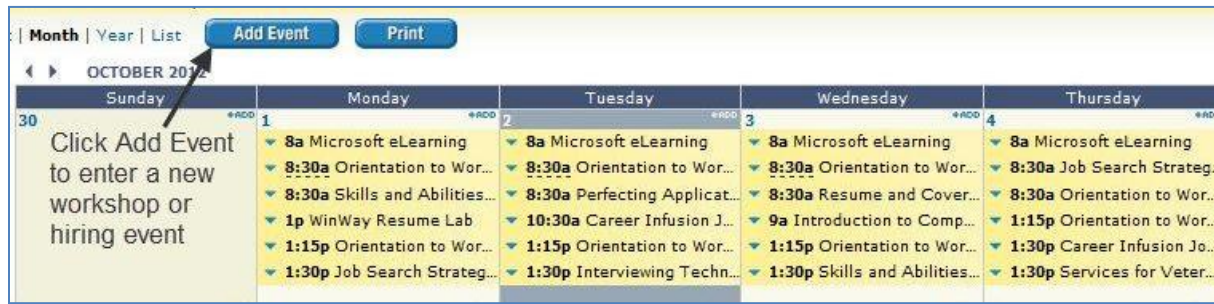
---

## Add events to the calendar using templates

The editor can add events to the calendar at any time. It is recommended that editors add events as far in advance as possible in order to maximize exposure to potential customers. This is especially true if registration is required in order to attend.



The **Add Event** button is on the editor calendar view when you login to Trumba



Click on the **Add Event** button to display the event templates.



The **Event Template** form is displayed. There are event template categories that an editor uses to input event data.

There are twelve event templates

- Six templates populate with the title and descriptions of the Essential Workshops (aka Job Hunter)
- Two templates can be used for employer related events Hiring Event and Job Fair
- One template for Computer Lab resources
- One template for WorkSource Orientations
- One template for area specific workshop topics (such as budgeting, community resources, how to apply for work with a specified employer)

The Essential Workshop/Job Hunter templates populate with the standard Title (shown on the form with the field label name Description) and the Description (shown on the form with the field label Notes :)

**Important** Do NOT modify the pre-filled template Descriptions or Notes fields. Do NOT add symbols such as asterisks, dashes or enter additional text to the pre-filled areas.

## Choosing a template

The screenshot shows the 'Event Information' tab of a web form. The 'Template' dropdown menu is open, displaying a list of options: Interviewing Techniques, Computer Lab, Hiring Event, Interviewing Techniques (highlighted), Job Club, Job-Search Strategies, Orientation to WorkSource Services, Other Workshops, Perfecting Applications, Résumé and Cover Letters, and Skills and Abilities Analysis. An arrow points from the text 'Choose an event template' to the dropdown arrow. Another arrow points from the text 'IMPORTANT: Do NOT modify the Description field (Title) of the Notes field (Description) on the Essential Workshops/Job Hunter templates.' to the 'Description' field. A third arrow points from the text 'If more information is required, enter it in the Additional Information field.' to the 'Additional Information' field. A fourth arrow points from the text 'Click on the down arrow to display a menu of templates. Choose a template from the drop down menu.' to the dropdown arrow. A fifth arrow points from the text 'Trumba displays the chosen template for input.' to the 'Notes' field, which contains a paragraph of text about interviewing techniques.

Event Information | Distribution List | Event Email | Event Registration | OK

(Dates and times in Pacific Standard Time)

Template: Interviewing Techniques ?

Description: ?

Location: Interviewing Techniques ?

Start: ?

Duration: 1 hours 0 minutes Specify End ?

Repeat: None ?

Room:

Contact Name:

Contact Phone:

Contact Email:

Workshop Language Option: English

Additional Information:

Event image: [No image] New ?

Event Registration:

Featured Event:

In-person job search activity: ☐ Yes ☐ No ☒ Not Specified

Notes: You might have the best résumé ever, but if you don't interview well, it won't matter. Being able to handle a job interview is a necessity for any job seeker. Knowing what employers are looking for and being prepared are absolute musts. In this workshop, you will learn valuable interviewing tips and have the chance to practice answers to frequently asked—and sometimes difficult—questions in a supportive, realistic environment.

Web link: http://

OK Cancel Save and Add Another

Choose an event template

IMPORTANT: Do NOT modify the Description field (Title) of the Notes field (Description) on the Essential Workshops/Job Hunter templates.

If more information is required, enter it in the Additional Information field.



Click on the **down arrow** to display a menu of templates. Choose a template from the drop down menu.



Trumba displays the chosen template for input.

Event Information Distribution List Event Email Event Registration OK

(Dates and times in Pacific Standard Time)

Template: Perfecting Applications ?

Description: Perfecting Applications

Location: Add Map Link ?  
Enter Lat/Long  
Recent Links

Start: November 7, 2012 All Day Event  
3:00 PM Specify End ?

Duration: 1 hours 0 minutes

Repeat: None ?

Room:

Contact Name:

Contact Phone:

Contact Email:

Workshop Language Option: English

Additional Information:

Event image: [No image] New ?

Event Registration:

Featured Event:

In-person job search activity: ☐ Yes ☐ No ☒ Not Specified

Notes: An important part of any job search is to understand the employer's point of view. In this workshop, you will learn how employers read applications and how to be better prepared to meet an employer's expectations. The workshop explores how to organize and communicate your skills and abilities in a way that stands out from the crowd. You will leave the workshop with a master application that will be helpful when filling out paper and electronic applications, and start you on your way to developing a résumé.

Web link: http://

OK Cancel Save and Add Another

Addresses previously entered into an event template are available to choose from by clicking on [Recent Links](#). If a map has been previously attached to an address in [Recent Links](#), there is no need to add a map again.

Event Information Distribution List Event Email Event Registration OK

(Dates and times in Pacific Standard Time)

Template: Perfecting Applications ?

Description: Perfecting Applications

Location: Add Map Link ?  
Enter Lat/Long  
Recent Links

Start: November 7, 2012 All Day Event  
3:00 PM Specify End ?

Duration: 1 hours 0 minutes

Repeat: None ?

Room:

Contact Name:

Contact Phone:

Contact Email:

Workshop Language Option: English

Additional Information:

Event image: [No image] New ?

Optional fields

## Adding information to an event template



After choosing a template from the drop down menu, enter the physical address of the event location in the **Location** field. Make sure that the WorkSource name is entered correctly in the Location field so that the mapping function works properly. Correct WorkSource office names are listed on [www.go2worksource.com](http://www.go2worksource.com).



To add a map to the physical location of the event, click the [Add Map Link](#).

When the map is added, go back and enter the location name to the physical address



Enter the **Start** date of the event. An alternative method to enter a start date is using the [calendar icon](#) to the right of the date entry fields. The calendar will open and allow the editor to choose a specific date.

Enter the **Start** time and be sure that the **AM** or **PM** has the correct association with the start time.

Enter the **Duration** of the event in Hours and Minutes. The public facing calendar will display the end time of the event based on the duration entered in this field.

NOTE: Be careful not to confuse **Duration** with the end date of an event in a repeating pattern. Clicking on [Specify end](#) opens fields to add the end date of the event. The specified end date is used for events that are in session for several consecutive days. If an end date is specified for Duration on an event, the calendars will behavior as if the event is multiple successive days.

*Example:* An event starting November 5, 2012 and ending December 31, 2012 would be have a 56 day duration.

The screenshot shows a web form titled "Event Information" with tabs for "Distribution List", "Event Email", and "Event Registration". The form is set to "Pacific Standard Time". It contains the following fields:

- Template:** A dropdown menu showing "Interviewing Techniques" with a green question mark icon.
- Description:** A text field containing "Interviewing Techniques".
- Location:** A text field containing "WorkSource Thurston County", "1570 Irving St SW", and "Tumwater, WA 98512". To the right are links: "Update Map Link", "Enter Lat/Long", and "Recent Links". Below the location field is a "Mapped location" field with the same address and a "Clear" link. A "Map link type" dropdown shows "Bing Maps" with a "Test Link" button.
- Start:** A date and time selector showing "November 5, 2012" and "2:00 PM". There are checkboxes for "All Day Event" and "Canceled".
- Duration:** A field showing "56 days 2 hours 0 minutes" and a "Specify End" link with a green question mark icon.
- Repeat:** A dropdown menu showing "None" with a green question mark icon.

An "OK" button is located in the top right corner of the form.

The **Room**, **Contact Name**, **Contact Phone**, **Contact Email** field are optional and, if entered, will display on the public facing calendar.

Choose a language from the drop down menu in the **Workshop Language Option** field. The choices are English, Spanish and Russian. More than one choice can be checked in this drop down. This is a required field.

Enter more information for the customer in the **Additional Information** field when necessary. This information may include such instructions as bring a work history, a resume, or flash drive with you, or to arrive 10 minutes early. Information in this field should not be advice about program regulations or advisories to unemployment insurance claimants.

The **Event Image** field will be used to add only approved iconography to Essential Workshop/Job Hunter event templates.  
(Note: Avoid adding seasonal, religious celebration, pop-culture, national or other images to this field.)

If entering a hiring event for one employer on the calendar, the **Hiring Event** template has an additional the **Detail image** field. A library of company logos is available at [company logos](#) for use in this field. Instructions on how to add a logo to the Detail image field is included on the link. The standards and specifications on the use of calendar images will be monitored by the overall calendar Publisher.

The **Event Registration** drop down menu contains two messages that display on the public facing calendar. Choose from either:

- First come First Served – If using “First Come First Served” do not add a registration form to the event.
- Sign up Required – Making this selection does not activate the registration requirement. That is done in the Event Registration process.

This field can be left blank if neither message is required to be displayed on the public facing calendar.

The **Notes** field is an open text field which allows the editor to describe the event. **Notes:** is a Trumba’s field name for the workshop or event **Description**. If an Essential Workshop/Job Hunter template is displayed the **Notes:** space will pre-fill. If using another template, the space may be open for input.

**Make sure that the Notes (description) is written in complete sentences, free of acronyms or jargon and explains the event fully. Remember that customers will see the calendar as an advertisement for WorkSource services.**

The **Featured Event** field is only used to create a promotion on an external website. This can only be accomplished by ESD ITSD with a request.

The **In-person job search activity** field is used to designate a workshop as potentially qualifying as an in-person activity for UI claimants. If the radio button is clicked on “yes”, the field displays on the public facing calendar.

In-person job search activity: ☐ Yes ☐ No ☒ Not Specified

In-person job search activity: An important part of any job search is to understand the employer's point of view. In this workshop, you will learn how employers read applications and how to be better prepared to meet an employer's expectations. The workshop explores how to organize and communicate your skills and abilities in a way that stands out from the crowd. You will leave the workshop with a master application that will be helpful when filling out paper and electronic applications, and start you on your way to developing a résumé.

Web link: http://

OK Cancel Save and Add Another

Use the In-person job search activity to indicate this workshop may fulfill UI work search requirements

The **Web Link** field can be used to enter an external web site address. It could be used to attach a link to an employer's web site or a WorkSource partner's web site. The link displays on the public facing calendar.

The **Send updates for:** field is interactive and creates “behind the scenes activity”. This field sends an automated message to any person who registered or chose to be notified of changes to the calendar when the Description field (Title), the Location field, the Time field or the Notes (Description) field is modified.

The email or text message is sent any person who chose an Event Action on the calendar as displayed in this graphic. This situation occurs most often when editing an existing calendar event.

#### *Tips for entering text and URLs into the template*

- If copying and pasting text from a Microsoft Word document or webpage into an event template, remember that html formatting may not translate the Word formatting. There could be unwanted breaks in the text.
- Copying and pasting a URL or email address into a template may cause an error. Check to see if there's an extra space at the end of the address or URL and delete the space.

**WORKSHOP LANGUAGE OPTION** English

**Event Type**

- ☒ Computer Lab
- ☒ Hiring Event
- ☒ Interviewing Techniques
- ☒ Job Fair
- ☒ Job Search Strategies
- ☒ Orientation to WorkSource Services
- ☒ Other Workshops
- ☒ Perfecting Applications
- ☒ Resume and Cover Letter
- ☒ Skills and Abilities Analysis

Select: All, None

**Search**

Go

**EVENT DETAILS**

The most difficult part of any job search may be taking the first step. WorkSource is here to help you! During this workshop you will be given an overview of the services available at your local WorkSource office to assist with all phases of your job search. You will also be introduced to Go2WorkSource.com, your premier online resource for finding work in Washington State.

This workshop will introduce you to an array of employment and training services and get you connected with staff who are experts in the local labor market. This information is appropriate for any job seeker to assist with specific needs. The Job Search Readiness Inventory will guide you in getting started.

[Add to My Calendar](#) [Forward to Friends](#) [Other Event Actions...](#)

[Back to Previous View](#)

[Print](#)

Events calendar powered by Trumba

**Other Event Actions...**

- Notify me of changes
- Remind me by email
- Email me event info
- Remind me by txt msg
- Txt me event info
- Download event info

**Map**

500 yds

View Full Map

**Important** In order to avoid sending unintended messages, the editor should be careful to examine the **Send updates for:** field for any checked boxes that would result sending a customer a message when in fact only a minor correct was made to the event.

## Saving and publishing an event

After checking the information on the event template form for accuracy, the editor can publish the event to the public facing calendar.

Trumba does not have a spell check feature so it is important to scan the entire template form to ensure it is correct before publishing



Click on **OK** either at the bottom of the template form or at the top right corner of the form to **SAVE** and **PUBLISH** the event to the calendar.



To view the public facing calendar Click on the **Published at:** link at the top of the calendar.

Published at: [esd1wbolydev1](#)

[Month](#) | [Year](#) | [List](#) [Add Event](#) [Print](#)

◀ ▶ **OCTOBER 2012**

Sunday	Monday	Tuesday	Wed



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## Add a Registration form to an event

The registration form is a feature which can be attached to a calendar event to require a customer to sign up to attend. Registration provides the flexibility to limit the number of attendees; the ability for staff members to sign up a customer for an event and collect data to track who intends to come to the event.

(Important: The registration form and feature DOES NOT collect data on who actually attended on the event. That data has to be collected manually at the event location)

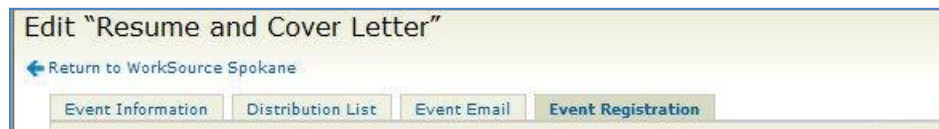
The registration form captures the attendee name and email address which is securely stored by Trumba.

Event registration can be added

1. at the time the editor enters the event data on a template
2. after an event is published to the public facing calendar using the edit feature



Click on the [Event Registration TAB](#) on the event template



The [Registration](#) form is displayed on the page. The registration page has four tabs. The ONLY tab we are using is Event registration. The Distribution List and Event Email tab are used by commercial entities to invite known lists of customers to conferences.



**Edit "Resume and Cover Letter"**

[Return to WorkSource Spokane](#)

Event Information | Distribution List | Event Email | **Event Registration** OK

☐ Send invitations to register for this event  
☒ **Open sign up for this event**  
☐ Allow attendees to bring guests  
☐ Show registration list when responding  
☒ **Show remaining openings when responding**  
☒ **Send registration confirmation**

Registration form: Sign Up Form 2 **Select Sign Up form**

Registration limit: 16

Max Guests / Registrant: 0

☐ Create wait list when fully booked

Response deadline: 1 hour [Specify End](#) 2

Response notification: None  
None  
JOswold@ESD.WA.GOV

When a visitor registers for this repeating event, register them for:

☐ Only their selected occurrence  
☐ Every event in the repeating series  
☐ Visitor chooses specific occurrences from a list of all occurrences  
☒ **Let the visitor choose from any of the three above options as they register**

**NO REGISTRATION INFORMATION EXISTS FOR THIS EVENT**

To invite specific people to register for this event, check "Send invitations to register for this event", then click "Distribution List" tab and specify those you wish to invite, and then click "OK".

To allow the public to sign up, check "Open sign up for this event" and a sign up button will appear next to this event in your published calendar.

Change: ☐ This and future events in the repeating pattern ☐ Only this event

OK Cancel Delete This Event Delete Entire Repeating Series

Click to check - Open sign up for this event; Show remaining openings when responding; Send registration confirmation

Choose your email address if you want notification by email of who has registered for the event

Update

Event Information | Distribution List | Event Email

☐ Send invitations to register for this event  
☒ Open sign up for this event  
☐ Allow attendee to bring guests  
☐ Show registration list when responding  
☐ Show remaining openings when responding  
☒ Send registration confirmation  
☒ Require attendee name  
☒ Require attendee email  
[Set registration success message](#)

View: Entire registration list

[Remove from List](#) | [Send Email](#) | [Add to Address Book](#) 2

Upon entering the registration form page the following defaults are active and should not be changed. Those defaults are the pre-filled box for **Sign Up Form** and the checked box **Send registration confirmation**.

The entries on this page are as follows:



Click to check the box to **Open sign up for this event**



Click on the box **Show remaining openings when responding** **ONLY** if **you want to** alert the registrants of how many openings remain for this event when they register.

Avoid clicking on **Show registration list when responding**. In Trumba responding means show the list of registrants to the viewer of the page.

A screenshot of the Trumba Event Registration form. The form has tabs for 'Event Information', 'Distribution List', 'Event Email', and 'Event Registration'. The 'Event Registration' tab is active. On the left, there are several checkboxes: 'Send invitations to register for this event' (unchecked), 'Open sign up for this event' (checked), 'Allow attendee to bring guests' (unchecked), 'Show registration list when responding' (checked), 'Show remaining openings when responding' (checked), and 'Send registration confirmation' (checked). On the right, there are fields for 'Registration form' (set to 'Sign Up Form'), 'Registration limit' (set to '5'), 'Max Guests / Registrant' (set to '5'), 'Create wait list when fully booked' (unchecked), 'Response deadline' (set to 'Start of event'), and 'Response notification' (set to 'Zunder@esd.na.gov'). A red arrow points from the text 'Clicking on show registration list when responding will provide the person registering a list of all the people who have signed up.' to the 'Show registration list when responding' checkbox.

The actions that can be taken on the registration form actions include:

**Registration limit:** (1 to 1,500 registrants). Remember that there is a relationship between the **Registration limit** and the **Show remaining openings when responding** check box. If the office practice is to over schedule to fill a workshop room, remember that if 50 openings are entered for an event with the expectation that 25 will attend, the registrants will see potentially the remaining number based on 50 openings when they sign-up.

Whether registrants can bring **Max Guests/ Registrants** – this field is only active if the box to allow attendee to bring guests is checked. A maximum number of guests can be designated from 1 to 1,500. (Suggestion: This field could be used for hiring events.) Select **Max Guests limit** – If not allowing customers to bring guests, leave the value at zero “0”.

The **Response deadline:** designates when the last registration can be accepted. If a customer attempts to sign up after the registration is closed, they will receive a message.)



Select the **Registration limit** number from the drop down



Select the **Response deadline** value from the drop down list.



Select to be notified of customer sign ups by selecting your email address from the **Response notification** drop down menu. This means that individual emails will appear in the editors Outlook email box each time a customer signs up for an event. To avoid receiving multiple emails, leave the field with the “None” value.



Click **OK** to save and publish the registration attached to the event on the public facing calendar. The calendar will display a **SIGN IN** button next to the event Title.

## The Participant Registration Form

When the customer clicks on SIGN IN the public facing registration form will display.

The registrant can choose to be notified of changes, forward the event to friends, receive a reminder email or text message, receive a text message with event info or even download the event.

The public facing registration form has five required fields for the customer to enter data. *All entry fields on this form should be completed with customer information.*

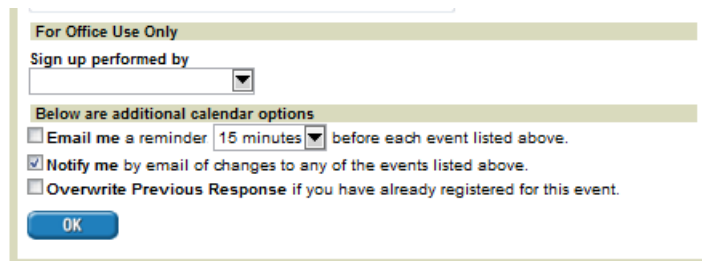
### Input fields

- Your Name
- Your Email Address
- Attendee Last Name
- Attendee First Name
- Have you (or are you the spouse of a person who) served in the U.S. Military Service?
- Email address
- Phone number - optional

Though the name fields appear twice and seem to be duplicative, the data entered serves more than one purpose.

The data entered in this registration form is used on the [Registration Report](#). Each data item appears in a separate column in the report.

If a WorkSource staff member or partner signs up a customer to attend an event, it can be indicated by using the drop down menu in the **For Office Use Only** to select **WorkSource Staff Member**.

A screenshot of a web form section titled "For Office Use Only" in a light green header. Below the header is a dropdown menu labeled "Sign up performed by". Underneath is another light green header that reads "Below are additional calendar options". This section contains three checkboxes: "Email me a reminder" (unchecked) with a "15 minutes" dropdown and the text "before each event listed above."; "Notify me by email of changes to any of the events listed above." (checked); and "Overwrite Previous Response if you have already registered for this event." (unchecked). At the bottom of this section is a blue "OK" button.

Below the For Office Use Only field is additional calendar options for the customer. The customer can choose to receive a reminder of registration or a notification of any changes to the event.

---

### **Event registration evidence**

Once a customer has completed the sign up for an event the attendee data is displayed on the Event Registration Tab in the event template.



Select the event with a registration attached (Sign up) from the editors view of the calendar and click on the title.



Click on Event Registration Tab to view the list of attendees at the bottom of the page

Return to WorkSource Lewis County

Event Information | Distribution List | Event Email | **Event Registration** OK

☒ Send invitations to register for this event  
☒ Open sign up for this event  
☐ Allow attendee to bring guests  
☐ Show registration list when responding  
☒ Show remaining openings when responding  
☒ Send registration confirmation

Registration form: Sign Up Form ?  
 Registration limit: 20  
 Max Guests / Registrant: 0  
☐ Create wait list when fully booked  
 Response deadline: Start of event Specify End ?  
 Response notification: None

When a visitor registers for this repeating event, register them for:

☒ Only their selected occurrence  
☐ Every event in the repeating series  
☐ Visitor chooses specific occurrences from a list of all occurrences  
☐ Let the visitor choose from any of the three above options as they register

Name	Email	Status	Actions	Attendee Last Name	Attendee First Name	Military	Email Address	Phone Number	Office Only
Chip Kormas	ckormas@esd.wa.gov	Registered	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Add to Address Book</a>	Kormas	Chip	Yes	CKormas@esd.wa.gov		
Jan Oswald	JOswold@ESD.WA.GOV	Registered	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Add to Address Book</a>	Oswold	Jan	No	jowold@esd.wa.gov		
Rachel Nedrow	rnedrow@esd.wa.gov	Registered	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Add to Address Book</a>	Nedrow	Rachel	No	rnedrow@esd.wa.gov		

Summary: 3 Registered

[Export Registration Data](#)

Change: ☒ This and future events in the repeating pattern ☐ Only this event

OK Cancel Delete This Event Delete Entire Repeating Series



The list on this page can be used as a workshop or event roster by clicking on the [Export Registration Data](#) link. The data will populate an Excel spreadsheet. Add a column on the spreadsheet titled Attended to mark the names of those who actually participate in the event.

**(Important:** If the workshop facilitator chooses to use this list as check-in sheet at the event, the private information such as email address and phone number must be removed prior to sharing the sheet with participants.


## Enter a recurring event

Many workshops or events may repeat throughout the month or year. Trumba has a feature which allows the editor to enter an event that repeats in a pattern such as every Tuesday at 9:00AM. A recurring event can be created when an event is added to a calendar. An existing event can also be edited to change a one-time event to a recurring event.

There are some elements to recurring events that can be tricky to navigate due to defaults and details in the relationships between fields.

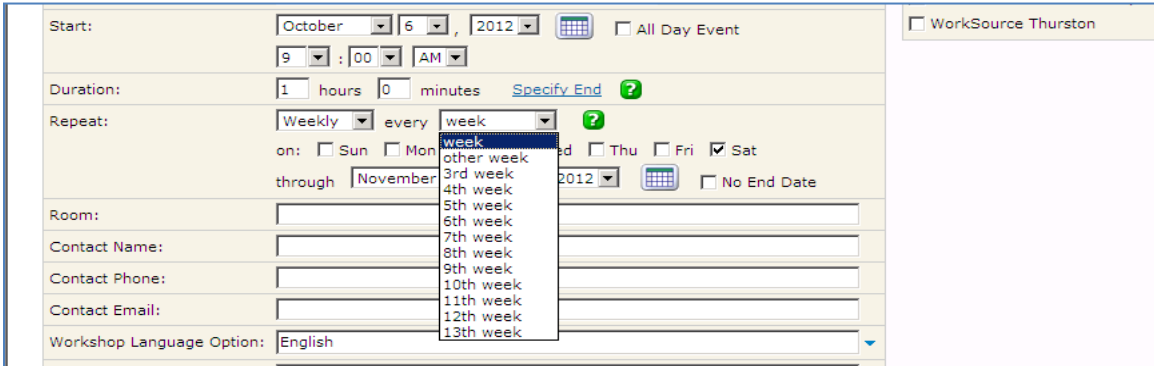
Before entering a reoccurring event, think about the pattern of occurrence and consult a calendar for holidays and numbers of weekdays in a month.

When choosing a repeating pattern for an event, editors should be careful to observe what displays in the additional fields. Some of the fields have default values which the editor will want to change.

Using the HELP  associated with the fields as reminders of what options cause what behaviors.



To indicate that an event is recurring, click on the drop down menu in the **Repeat** field. Choose from the values daily, weekly, monthly or yearly and the frequency every other week, 3<sup>rd</sup> week, 4<sup>th</sup> week, 5<sup>th</sup> week and so forth.



Click on the day of the week in the repeated pattern (such as a Weekly event, every 3<sup>rd</sup> week, occurring on Tuesday)

Use the drop down menus to indicate the month, day and year for the repeating pattern to end. **It is important to enter an end date for a repeating pattern. It should be no more than three months into the future.**

---

## Repeating patterns

Think about the pattern of the repeating event. Each month does not have the same number of Mondays, Tuesdays, Wednesdays, Thursdays and Fridays. Some months have holidays.

*Examples:*

1. Is the event every Mon, Weds, Fri of the week?
2. Is the event every Weds of the month?
3. Is the event every other Weds of the month?

When making a choice about the repeating pattern

- Daily does not mean every day. It means every other day, 3<sup>rd</sup> day or 4<sup>th</sup> day of the week. Every day is actually a weekly pattern



- Weekly means every other week, every 3<sup>rd</sup> week, every 4<sup>th</sup> week. Weekly does not mean the 1<sup>st</sup> Monday of a week, the 2<sup>nd</sup> Monday of a week. That is a monthly pattern
- Monthly patterns key off the day of the week entered in the Start date.

The screenshot shows a form for creating a calendar event. The 'Start' date is set to November 2, 2012, at 4:30 PM. The 'Repeat' section is set to 'Monthly' on 'the 2nd day' every 'month'. A dropdown menu is open, showing options: 'the 2nd day', 'the 1st Friday', 'the 2nd weekday', 'the 29th to last day', 'the 5th to last Friday', and 'the 21st to last weekday'. The 'No End Date' checkbox is checked. The text 'Monthly patterns' is overlaid on the right side of the form.

In the screen capture, the start date is November 2, 2012 which is a Friday. The drop down menu provides the options of 2<sup>nd</sup> day of the month, the 1<sup>st</sup> Friday of the month, the 2<sup>nd</sup> weekday of the month.

Clicking on the **No End Date** box will result in the following:

- Annual events will remain on the calendar for 200 years
- Monthly events will remain on the calendar for 40 years
- Weekly events will remain on the calendar for 20 years
- Daily events will remain on the calendar for 2 years

### Example

The screenshot shows a calendar view for the month of September 2012. A repeating event series is displayed, with occurrences on various dates. The events are: 'LinkedIn Training Part 1', 'IEL - Career Transitions Session', and 'Meet the Employers'. Each event entry includes the date, time, and location (WorkSource Spokane, 130 South Arthur Street, Spokane, WA 98202-22).

Date	Event	Location
Fri., 7/30/32	* LinkedIn Training Part 1	WorkSource Spokane, 130 South Arthur Street, Spokane, WA 98202-22
Tue., 8/10/32	IEL - Career Transitions Session	WorkSource Spokane, 130 S Arthur Street, Spokane, WA 99202-22
Wed., 8/18/32	* Meet the Employers	WorkSource Spokane, 130 S Arthur Street, Spokane, WA 99202-22 3 - 5pm - R
Tue., 8/24/32	* Career Transitions	WorkSource Spokane, 130 S Arthur Street, Spokane, WA 99202-22 2 - 4pm - Re
Wed., 8/25/32	* LinkedIn Training Part 1	WorkSource Spokane, 130 South Arthur Street, Spokane, WA 98202-22
Fri., 8/27/32	* LinkedIn Training Part 1	WorkSource Spokane, 130 South Arthur Street, Spokane, WA 98202-22
Tue., 9/14/32	IEL - Career Transitions Session	WorkSource Spokane, 130 S Arthur Street, Spokane, WA 99202-22
Wed., 9/15/32	* Meet the Employers	WorkSource Spokane, 130 S Arthur Street, Spokane, WA 99202-22 3 - 5pm - R
Wed., 9/22/32	* LinkedIn Training Part 1	WorkSource Spokane, 130 South Arthur Street, Spokane, WA 98202-22

Once a repeating event is set up, the editor can change the event description, location, start time, duration, end date, notes, and web link. Changes can apply to just one event in the repeating series or to all future events in the series.

(**Caution:** The recurrence pattern for a repeating event can't be changed after it is published. To change the pattern, delete all occurrences of the original event and create a new repeating event.)

If there is any potential that variations in a repeating event could occur such as every 4<sup>th</sup> week the workshop changes from Tuesday/Thursday to Monday/Thursday, create separate events for those variances.

---

## Editing an event

Editing an event on the public facing calendar may be necessary for several different reasons. An event may be cancelled, the date changed, the location changed or additional information added. Editing is also used for correcting minor errors in text. To edit an existing calendar event select the event from the editors calendar view.



Click on the title of the event or choose edit from the drop down menu to the left of the title.



The event will display and be open for editing. **Any changes to the date, location, time or notes fields has the potential to trigger an email or text message to any customer who indicated a desire to be notified on the public facing calendar or who has registered to attend an event.**

It is important to remember to look at the **Send Updates for:** check boxes and uncheck them if no notification is required for a change such as a typo correction to text in the Notes field.

**Event Information** | Distribution List | Event Email | Event Registration OK

(Dates and times in Pacific Standard Time)

Template: Interviewing Techniques ?

Description: Interviewing Techniques

Location: WorkSource Spokane  
130 South Arthur Street  
Spokane, WA 99202 Update Map Link Enter Lat/Long Recent Links ?

Mapped location: WorkSource Spokane, 130 S Arthur St, Spokane, WA 99202 Clear

Map link type: Bing Maps Test Link

Start: November 9, 2012 Calendar icon ☐ All Day Event ☐ Canceled

Duration: 3 hours

Repeats: Every Friday through Calendar icon ?

Room: Ponderosa

Contact Name:

Contact Phone:

Contact Email:

Workshop Language Option: English

Additional Information:

Event image: [No image] New ?

Event Registration:

**Calendar Pop-up:**

NOVEMBER 2012

S	M	T	W	T	F	S
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	
DEC						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	JAN 2013				
	1	2	3	4	5	
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

← Edit the event to change the date



The screenshot shows a web form for event registration. At the top, it displays the start date as November 8, 2012, at 2:30 PM, with a duration of 2 hours and 30 minutes. The event repeats every Thursday starting from September 6, 2012, through December 20, 2012. Fields for Room, Contact Name, Contact Phone, Contact Email, and Workshop Language Option (English) are present. The 'Additional Information' field contains text about computer skills. The 'Event image' field is set to '[No image]'. The 'Event Registration' dropdown is set to 'Featured Event'. The 'In-person job search activity' has radio buttons for 'Yes' (selected), 'No', and 'Not Specified'. The 'Notes' field contains a paragraph about job seekers. The 'Web link' field is empty. The 'Send updates for' section has checkboxes for 'Description', 'Location', 'Time' (checked), and 'Notes'. A yellow bar at the bottom indicates the change scope: 'This and future events in the repeating pattern' (selected) or 'Only this event'. At the very bottom are buttons for 'OK', 'Cancel', 'Delete This Event', and 'Delete Entire Repeating Series'. A callout arrow points from the text 'Changing the start time activates the notification check box' to the 'Time' checkbox in the 'Send updates for' section.

Additions or changes to the **Additional information** field does not trigger a notification to attendees or registrants, so it is also important to **click on and check the Notes field box** if it is necessary that attendees and registrants receive an update email or text message.

---

## Customer Registration confirmation

When a customer registers for an event on the calendar by clicking on the **Sign Up** button and completing the web form, an on screen confirmation is displayed.

The confirmation displays the location, time and description of the event and alerts the customer that a confirmation email will be sent to them.

The customer also has several options to choose from on the confirmation notice.

- [Add the event to my calendar](#)
- [Send me a reminder by email](#)
- [Send me a reminder by text message](#)

In addition, the customer can use the same [Event Actions links](#) available when viewing a non-registration event on the calendar.

**TRUMBA®** [Help](#)

Time zone: (GMT-08:00) Pacific Time (US & Canada)

**Event Actions**

- [Add to my calendar](#)
- Sign up for event**
- [Notify me of changes](#)
- [Forward to friends](#)
- [Remind me by email](#)
- [Remind me by txt msg](#)
- [Email me event info](#)
- [Txt me event info](#)
- [Download event info](#)

**Career Infusion Job Club**

WHERE: WorkSource Spokane [Map](#)  
 130 South Arthur Street  
 Spokane, WA 98202-2291

ROOM: Redwood

WORKSHOP LANGUAGE OPTION: English

EVENT REGISTRATION: Sign Up Required

NOTES: Meet weekly with other job seekers and WorkSource staff to network, brainstorm, develop job leads, build camaraderie, share struggles and gain job search advice. New topics weekly!

WHEN: Tuesday, October 9, 2012, 10:30am – 12pm PDT

---

**Done.** You are registered for the event listed above.  
 You will be sent an email confirmation of your registration.

Hint: To receive a reminder before the event, use the appropriate link.

[Add the event to my calendar](#)  
[Send me a reminder by email](#)  
[Send me a reminder by txt msg](#)

[Back](#) [Close Window](#)

## Public Facing Calendar View

The Public facing calendar means just that. It is what the public sees over the internet just like anyone looking at Google, Amazon.com or any other web site. The editor can view the public facing calendar for their location at any time.



The [Published at:](#) link is located next to your Office Name above the calendar.

**Events** | **Images**

**WorkSource Spokane** Published at: esd1wbolydev1

View: [Day](#) | [3 Day](#) | [Week](#) | [5 Week](#) | [Month](#) | [Year](#) | [List](#)

[Add Event](#)
[Print](#)

◀ ▶ **OCTOBER 2012**

S	M	T	W	T	F	S
30	1	2	3	4	5	6

◀ ▶ **OCTOBER 2012**

Sunday	Monday
30	1

Link to public facing calendar



Click on [Published at:](#) link



The public facing calendar opens in a separate window.

## Changing Dates



Click the **Prev** and **Next** buttons to move back and forward by one The next or previous day/week/month/ or year displays



Click on a date in the small calendar on the left.



The events scheduled for that date are displayed. **Arrow buttons** just above the small calendar can be used to change from month to month.

**WorkSource Lewis County**

**Event Calendar**

There are several methods to navigate the public facing calendar.

Click the Prev and Next buttons to change the month view  
 Click on the Calendar View drop down menu to choose a view  
 Click on the Select links to filter the categories of events

PRINT | SUBSCRIBE | iCAL | RSS

**October 2012**

DATE	LOCATION
Wed., Oct. 3 9am	WorkSource Lewis County 151 NE Hampe Way Chehalis WA 98532
Wed., Oct. 3 1pm	WorkSource Lewis County 151 NE Hampe Way Chehalis WA 98532
Wed., Oct. 3 1pm	WorkSource Lewis County 151 NE Hampe Way Chehalis WA 98532
Thu., Oct. 4 12pm	WorkSource Lewis County 151 NE Hampe Way Chehalis WA 98532
Thu., Oct. 4 1pm	WorkSource Lewis County 151 NE Hampe Way Chehalis WA 98532
Thu., Oct. 4 2pm	WorkSource Lewis County 151 NE Hampe Way Chehalis WA 98532
Fri., Oct. 5	WorkSource Lewis County

**Calendar View**  
 Summary View

**Event Type**

- ☒ Computer Lab
- ☒ Interviewing Techniques
- ☒ Orientation to WorkSource Services
- ☒ Other Workshops
- ☒ Perfecting Applications
- ☒ Resume and Cover Letter
- ☒ Skills and Abilities Analysis

Select: All, None

**Other Locations**  
 Select one Go

**Introduction to the Internet**  
 The Internet is essential to job searching in today's job market. Learn the basics of Internet Explorer and how to use your e-mail to make job contacts and send resumes. Don't have an e-mail account? Come early and we will help you create a free one.

**GED Prep (Reading/Writing)**  
 Receive instruction on reading and writing to prepare you for the General Education Diploma (GED) exam. Please contact the Phoenix Center at Centralia College, (360) 736-9391, ext 216, for registration information.

**Job Corps Orientation**  
 Job Corps is a free education and training program that helps young people (ages 16-24) learn a career, earn a high school diploma or GED, and find and keep a good job.

**Introduction to Microsoft Word**  
 Word processing is one of the most widely used tools today. Learn the core functions of Microsoft Word 2007 and how to use them when creating a resume and cover letter.

**GED Prep (math)**  
 Receive instruction on math to prepare you for the General Education Diploma (GED) exam. Please contact the Phoenix Center at Centralia College, (360) 736-9391, ext 216, for registration information.

**Resume and Cover Letter**  
 Successful job seekers take the time to learn what employers want. Learn how two of the four primary pieces of job search related communication convey to a prospective employer who you are, what you know and what you have to offer. Learn which resume and cover letter format best displays your skills, knowledge and abilities in order to attract employers and lead to more interviews!

**Interviewing Techniques**

## Changing Views



Go to the [Calendar View](#) on the left and click the [drop down](#) menu. View the list then select one of the choices.



The look of how the events are displayed changes. Some views contain more information about an event while some display less

There are four calendar views available to the customer

List View  
Month View  
Detail View  
Summary View

October 2012

Calendar View

Summary View

List View

Month View

Detail View - Description

Summary View

☒ Hiring Event

☒ Interviewing Techniques

☒ Job Fair

☒ Job Search Strategies

☒ Orientation to WorkSource Services

☒ Other Workshops

☒ Perfecting Applications

☒ Resume and Cover Letter

☒ Skills and Abilities Analysis

Select: All, None

EVENT	DATE	LOCATION
Microsoft eLearning	Tue., Oct. 2 8am	WorkSource Spokane 130 South Arthur Street Spokane, WA 98202-2291
Orientation to WorkSource Services	Tue., Oct. 2 8:30am	WorkSource Spokane 130 South Arthur Street Spokane, WA 98202-2291
Perfecting Applications	Tue., Oct. 2 8:30am	WorkSource Spokane 130 South Arthur Street Spokane, WA 98202-2291
Career Infusion Job Club	Tue., Oct. 2 10:30am	WorkSource Spokane 130 South Arthur Street Spokane, WA 98202-2291
Orientation to WorkSource Services	Tue., Oct. 2 1:15pm	WorkSource Spokane 130 South Arthur Street Spokane, WA 98202-2291
Interviewing Techniques	Tue., Oct. 2	WorkSource Spokane



Return to the **Calendar View** drop down to click and view the other choices

## View Event Details



Pick an event and click on the event name



The event details display including; when, where, what room, additional information or instructions for attendees, description of the event, a calendar and options for tagging the event.



Return to the Editor view by either clicking your browser **Back Button** or clicking the **X** in the top right hand corner of the screen to close the window.



The Editor view now displays

**Important:** There is a 10 minute refresh on the public facing calendar. This means that you may or may not see your new/modified event right away. To force a refresh, try changing the [Calendar View](#) or select a different month using the **Prev/Next** buttons.

---

## Additional Information about browsers and cache'

The browser cache (pronounced “cash”), also referred to as the temporary Internet files, contains files from web sites you've visited that your browser remembers and keeps in memory. For example, when you view a website where the WorkSource events are displayed, that specific view is cached for 10 minutes in your web browser. The reason for the cache in a web browser such as Internet Explorer, FireFox, etc., is it allows a faster view/display of that web pages the next time you open that web site. Instead of having the data being retrieved from Trumba web site each time you view a web page, the events are instead pulled from the browser cache (on your computer) which, speeds up the display of the web page.

You may encounter a situation where you are viewing your public WorkSource event calendar and then you go in to your Trumba account to add or edit an event on the calendar. When you go back to view the public WorkSource event calendar, you will not see the new event or edited event for 10-minutes. This is because the browser is displaying the original content in its cache. If you do experience this, you can sometimes “force” the page to reload and give you updated data by clicking the **Prev** or **Next** buttons at the top of the calendar; select a different month above the Prev/Next buttons; or changing the calendar view to a different view:



By making this type of change to the calendar, the browser knows that it needs to refresh the page and provide new data to display on the page. It then sends a request back to the web servers and will pull in your updates, displaying the most current information.

*This training document will be updated as additional functionality is made available.*

Questions:

Jan Oswald – WA State Employment security Department  
Employment and Career Development Division  
[joswold@esd.wa.gov](mailto:joswold@esd.wa.gov) (360) 407-1364