QUICK GUIDE FOR SECTION LEADERS AND EXECUTIVE – January 2013 v3.0

UPLOAD FILE TO SONG PAGE

1. In top menu, point to Music to display the drop down menu and then click on Music
2. Click on the name of the song you want to add files to
3. You should now see an Edit tab (next to the View tab that everyone sees). Click on the Edit tab.
4. Scroll down to the bottom of the list of files attached to that song. You should see "Attach new file" with a button called "Choose File". Click on "Choose File". This opens your file browser so you can locate the file on your computer. After you select the file (e.g. by double left clicking on it) the name of the file will appear next to the "Choose File" button.
5. Click on "Attach". The file will be attached to the song and will appear at the bottom of the list.

UPDATE SONG STATUS FROM SONG STATUS QUEUE

1. In top menu, point to Music to display the drop down menu and then click on Song Status Queue
2. You will see a list of songs with Test Ready status (if members have uploaded their riser recordings through the website).
3. You can view all Sections, or filter the list by clicking on the Sections box on the left.
4. To check a submitted riser track, click on "check it" under Actions.
5. To listen to an uploaded file click on the name of the file.
6. To change song status to Approved, click on Approved. If not passed, change status back to Learning!
7. To add a comment, click in the Comment box.
8. Click on Preview to preview comment (optional).
9. Click on Save to save comment.

UPDATE SONG STATUS FROM MUSIC

1. In top menu, point to Music to display the drop down menu and then click on Music
2. For the song you want to update, look under Group Learning Status (right hand side) and click on Edit
3. You should then see a list of members with their current song status. To change their status, click on the drop down box and choose Approved.
4. No need to save - the change is made as soon as you change their status.
5. To add comments or upload files, click on Edit (right hand side) next to their name.

VIEW SONG STATUS REPORT

1. From the top menu, point to Music to display the drop down menu and then click on Song Status
2. The table shows chorus members and their song status for each song, organised by Section
3. Click on Filters and choose a particular Section or Song Category

UPDATE SONG STATUS FROM MEMBERS

1. From the Members Only menu, click on Member List
2. For the member you want to edit song status for, look under the Song Status heading on the right and click on Edit
3. Look down the list of songs to find the song you want to update song status for.
4. Under the Status heading, click on the down arrow to choose a different song status.
5. Entries are saved when you change them - you don't need to do anything else to save the change.

CHECK PLANNED ATTENDANCE

1. In top menu, point to Members to display the drop down menu and then click on Attendance.
2. The Attendance tab shows a summary of planned attendance for future calendar events.
3. For the event you're interested in, click on the numbers under Plans.
4. This shows a summary by section, and underneath an alphabetical list of members with their planned attendance.

VIEW PAST ATTENDANCE

1. In top menu, point to Members to display the drop down menu, and then click on Attendance
2. On the Attendance tab, click on Attendance Report
3. The table shows chorus members and their attendance status for past events.
4. Click on Filters to specify a Section and/or date range.
5. Note that this report is for past attendance

EDIT PLANNED ATTENDANCE FOR AN EVENT (SEVERAL PEOPLE)

1. In top menu, point to Calendar and click
2. Click on the event that you want to enter attendance for
3. Click on Attendance tab for this Event
4. Under the Plan heading, click on a response to edit it.
5. Entries are saved when you change them.

EDIT PLANNED ATTENDANCE FOR A PERSON (SEVERAL EVENTS)

1. In top menu, point to Members and click on Attendance
2. Click on the Member List tab
3. For the member you want to edit attendance for, look under the Attendance Last Month/Next Month heading, and click on Edit
4. Under the Plan heading, click on a response to edit it.
5. Entries are saved when you change them.

CREATE CONTENT – BLOG ENTRY

1. In the top menu, point to Interact to display the drop down menu and then click on News.
2. Click on 'Create Blog Entry' to open a blank form. Enter a title for your blog and then type your blog in the body.
3. You can add file attachments by clicking on File Attachments.
4. Click on Save.

Other members can view your blog by going to their Dashboard and scrolling down to Recent News.

Note: Blog (News) is different from Discussion Board (Forum) because it is not received as an email.

CREATE CONTENT – DOCUMENTS

1. In the top menu, click on Documents
2. From the list of topics (pages), click on the topic you want to create content for
3. For each topic you will see a list of attachments, plus any sub-topics ("child pages")
4. To add a sub-topic ('child' page), click on Add Child Page
5. Enter Title and Body text for your new topic
6. Click on File attachments to locate and attach files.
7. Click on Preview to preview your page (optional).
8. Click on Save to save.

EDIT CONTENT – DOCUMENTS

1. In the top menu, click on Documents
2. From the list of pages, click on the page you want to edit
3. Click on Edit to open the page for editing.
4. Amend the title and body text and add or delete attachments.
5. Click on Preview to preview your page (optional).
6. Click on Save to save.

ADD RECRUIT

1. In the top menu, click on Members to display dro down list, and then click on Recruiting
2. A list of potential recruits is displayed.
3. Click on "Add a new recruit record" to enter details about the new recruit, including follow-up task and notes
4. Click on Save.

FOLLOW UP RECRUIT

1. In the top menu, point to members and then click on Recruiting.
2. A list of recruits will be displayed, with contact details and follow-up responsibility.
3. Click on the name of the recruit to see their recruit record.

CREATE AND EDIT EVENTS

1. In the top menu, click on Calendar to display the Calendar.
2. Click on Add+ to create a new calendar event.
3. Fill in the Event form
4. Click on Repeat if the event repeats regularly.
5. Choose Calendar Type carefully: Types with asterisks will also display in the Public Calendar.
6. Put additional detail for members in the Internal Notes, and additional details for the public in the Body.
7. Click on File attachments to add attachments.
8. Under Notifications, untick "Do not send notifications" if you want an email about the event sent to invited subgroups.
9. Tick "Enabled for Attendance" if you want chorus members to record their planned attendance
10. Click on Save to save the event.

CREATE AND EDIT TASKS

1. In the top menu, point to Manage and click on Projects and Tasks
2. Tasks are grouped. Click on an existing task group or create a new task group by clicking on "Create New Task Group".
3. Click on "Create New Task" and fill in the Create Task form.
4. Click on Save.

ADD USER

1. In the top menu, point to Members and click on Member List
2. Click on Add User
3. Fill in the form with a unique user name (firstname.famiyname), email address and password.
4. Click on Create New Account.