Region 15 User Admin Summary

What does the User Admin do?
- Her main job is to keep the region aware of changes in membership in her chorus.
- She supports the job of the Regional Communication Coordinator by helping the region keep member and chorus contact information up to date.
- Inputs or deletes members and contact information into the Regional Directory
- Add and deletes Officer Positions to the directory.

Why is this job so important?
- The region is NOT notified by SAI when a member leaves, joins or changes contact information. The user admin bridges that gap.
- The information is used for the Regional Directory and quartet pages, when applicable.
- If a member is not put in the system they cannot sign into the members only site and will not receive email from the region.
- Officer listings will be incorrect if not up to date.
- Past members will still have access to the website if not removed.

What's new about the new site?
- Members can now update their own personal information, emails, phone numbers, etc without the user admin getting involved.
- The new regional directory includes everyone in the region and is easy to search and navigate.

Directions
A few times a year or whenever you have had changes in personel and officers, please do the following:

· **Check your Member List for accuracy. Add/delete members.**
· **Check all of your officers and add/remove officer roles as needed.**

This Document includes:
·**How to get a list of all of your chorus members on the website**
·**How to bulk add/remove officers.**
·**How to add a new user to the website.**
·**How to delete, block, edit or add member accounts**

NEW!

Add or remove officers without opening individual accounts.

Sample: Remove your current Chorus TC/President from the group on the left.
1. **Click Organizre Tab in Directory.**
2. **Select Group Role.**
3. **Click User name in the left coloumn (Users in this group)**
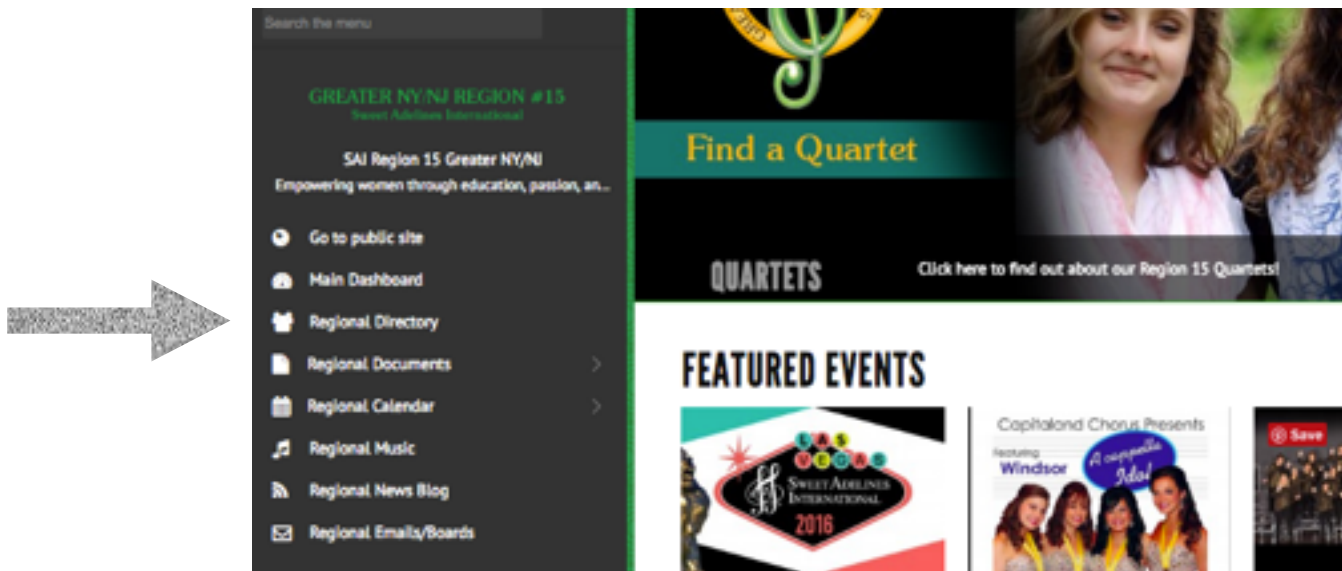4. **Click Green Button to move out of group into right column.**

To add your new Officer into Role
1. **Click on the name in the RIGHT Column (Users not in this group).**
2. **Click Green Button to move into group into left column.**

Repeat with other officers in your chorus as needed. You can also change their officer role by going into their individual accounts.

To get a list of your members:
Click on Filter
Under "Role" Type in the name of your chorus.

To edit a member's information
Click on the pencil icon next to their name

To delete a member
Select the Member and under "Actions"
Click Delete Account

To Add a New Member
Click Add User

Add User | Voice parts | Member Help

Regional Directory

| Members list | Roster | Activity | Skills |

▼ Filters   ≡ Actions   Select all   Deselect all

Name	Voice part	Role

Filters   ✕

Name
[   ]

Voice part
-- Show all -

Role
Saratoga
Custom roles / Subgroups
Saratoga Soundtrack

Ba...   ...rtet Member, Spirit of Syracuse

Le...   ...rty Oak

Ba...   ...mony Celebration, Evergreen, Chorus Assoc/Ass...

N/...   ...oter at Large

N/A   ...er, City of the Hills

Add a User: Click Add User

Account info *   Profile   Additional   Group information

Username *   *Given them a username such as their email address*

Spaces are allowed; punctuation is not allowed except for periods, hyphens, apostrophes, and underscores.

E-mail address *   *Type email address*

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

Password *   *Give them a temporary password they will change later at login*

Password strength:

Confirm password *

Provide a password for the new account in both fields.

Status

   ○ Blocked

   ● Active

   ALL members, even dual or associate MUST have Member Role

Roles   *Also add the name of your chorus and any officer role the member holds.*

[× Member] [× Saratoga Soundtrack]

First name *   *Include name*

Last name *

Nickname

Privacy level *

Normal - contact details are visible to other members   ▾

X Notify user of new account   *Click Notify User*

Check this box to send an email invitation to this new user. You can also send login invitation any time, from the Members list, using the Actions menu.

Chapter role

- ... ▾   *IGNORE Chapter Role since this is a regional, not chorus website.*

Chapter role

Create new account   *Click Create New Account*

There are many useful things you can do by using the Action tab in the Directory

Click on a member and Click Actions

You can

Set their voice part
Modify their Role (Add or delete Officer role or Chorus Name, CAL)
Send them an Email message
Send in a new Login Email if they can't get into the site
Block their Account if needed
Delete their Account if they completely leave SAI

Regional Directory

| Members list | Roster | Activity | Skills |

1 row selected

| ▼ Filters | ☰ Actions | Select all | Deselect all |

		Voice part	Role
Set primary voice part			
Modify roles		Bass	Member, Quartet Member, Spirit of S
Send a message			
Send login invitation		Lead	Member, Liberty Oak
Block account			
Delete account		Bass	Member, Harmony Celebration, Eve
Adkins, Charlotte ✏		N/A	Member, Chapter at Large

FAQ

What do I do about Dual members?
Dual Members will have BOTH choruses listed under "role."

How often should I update Information?
Add new members when they join, delete or change when their members changes.
Chapter Officer Information should be updated as soon as an election is held each Spring.

What do I do when a member leaves the chorus?
If they are transferring to CAL or another chorus, add the role of "Chapter at Large" or "between choruses" and delete your chorus name. If they are leaving SAI, cancel their account.

Why are some members of my chorus not getting emails?
If you are sure they are in the system, have them go into their account (top right of the screen) and update their contact information. They should also check their junk mail box.

Where can I get help?
If you need to add a member, delete a member or add an officer, watch the video link below for directions or contact us for help.

https://www.youtube.com/watch?v=_tjk_0jZmyw

Contact your Reg 15 Communications Coordinator at website@sairegion15.org