

Region 15 User Admin Summary

What does the User Admin do?

- Supports the job of the Regional Communication Coordinator by keeping member and chorus contact information up to date.
- Inputs or deletes members and contact information into the Regional Directory to keep communications accurate.
- Add and deletes Officer Positions in the directory.
- Encourages members to keep their contact information current on their regional website account.

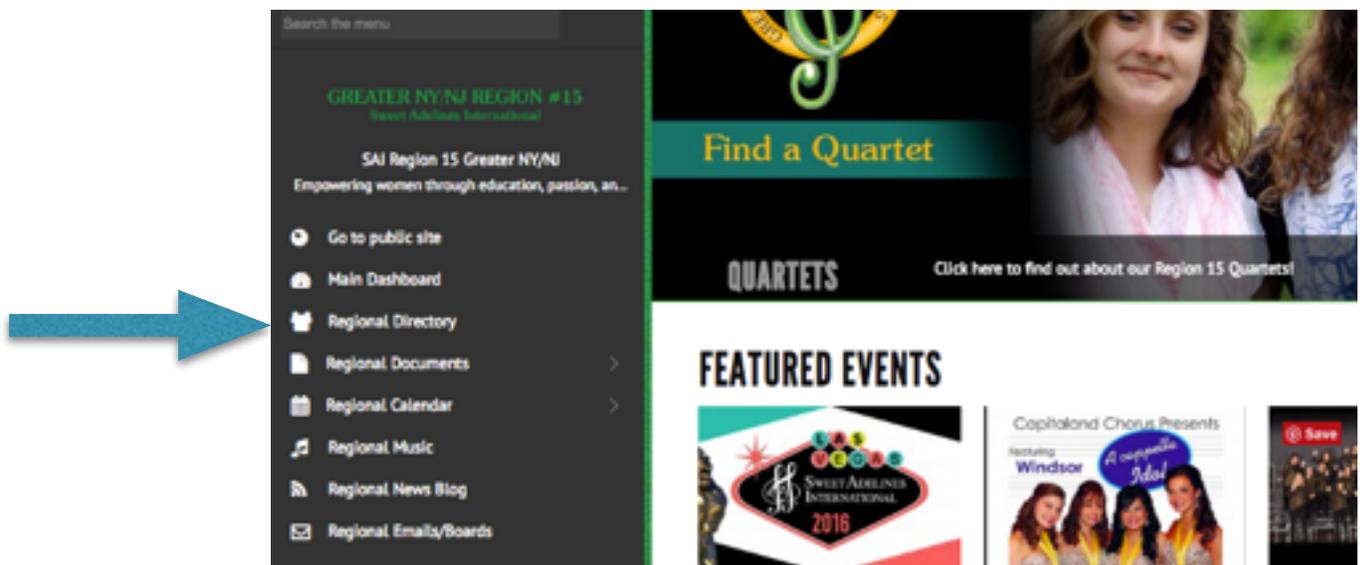
Why is this job so important?

- The region is not notified by SAI when a member leaves, joins or changes contact information. The user admin bridges that gap.
- If a member and officer information is not put in the system they cannot sign into the members only site and will not receive email from the region or be able to access event and music information.
- Past members will still have access to the website if not removed.

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.**



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

The screenshot shows the 'Regional Directory' interface. At the top right, there are links for 'Add User', 'Voice parts', and 'Member Help', with 'Add User' circled in red. Below the header, there are tabs for 'Members list', 'Roster', 'Activity', and 'Skills'. A toolbar contains 'Filters' (circled in red), 'Actions' (circled in red), 'Select all', and 'Deselect all'. The main table has columns for 'Name', 'Voice part', and 'Role'. A 'Filters' modal is open, showing input fields for 'Name', 'Voice part', and 'Role'. The 'Role' field is circled in red, and a dropdown menu is open below it, showing 'Saratoga' and 'Custom roles / Subgroups' with 'Saratoga Soundtrack' selected. In the table, the first member's name field has a pencil icon circled in red.

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.

First name *

Include name

Last name *

Nickname

Privacy level *

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

The screenshot shows the 'Regional Directory' interface. At the top, there are tabs for 'Members list', 'Roster', 'Activity', and 'Skills'. Below the tabs, it indicates '1 row selected'. A navigation bar contains 'Filters', 'Actions', 'Select all', and 'Deselect all'. The main table has columns for 'Voice part' and 'Role'. An actions menu is open over the first row, listing: 'Set primary voice part', 'Modify roles', 'Send a message', 'Send login invitation', 'Block account', and 'Delete account'. The table contains the following data:

	Voice part	Role
	Bass	Member, Quartet Member, Spirit of S
	Lead	Member, Liberty Oak
	Bass	Member, Harmony Celebration, Ever
Adkins, Charlotte	N/A	Member, Chapter at Large

NEW!

Add or remove officers without opening individual accounts.

Sample: Remove your current Chorus TC/President from the group on the left.

- 1. Click Organize Tab in Directory.**
- 2. Select Group Role.**
- 3. Click User name in the left column (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.

The screenshot shows the 'Organize' tab in the choirgenius directory. The 'Members list' tab is selected, and the 'Organize' sub-tab is active. The 'Select group' dropdown is set to 'Chorus TC/President'. A green button labeled 'Move selected people to other column' is visible. The interface is divided into two columns: 'Users in this group' and 'Users not in this group'. In the 'Users in this group' column, the user 'test, Ensemble' is selected with a checked checkbox. A blue arrow points from the text 'Will be moved into the Users NOT in this group' to the 'Users not in this group' column.

Will be moved into the Users NOT in this group

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**