

# Quick Start Guide

*Powered by Time and Talents! Portland, MN*

## Logging In

### **To Login**

Enter your email address. > Enter your password. > Press [Enter] or click [Log In] Notes: You may check [x] Remember Me and the system will remember your username. (This will not keep you logged in.)

### **To Reset Your Password (before logging in)**

Click 'Forgot your password?' >

Enter your username (email address) if it is not already there.

Enter the 3 security characters in the box. >

Click [Reset] >

Check your email (and Junk email folder) for your reset password. Notes: If not found ask your Coordinator to Reset your password for you.

### **To Change Your Password (after logging in)**

Login >

Click 'Account' on the menu bar. >

Click the 'Change Password' icon . >

Enter your new password in the two boxes provided. > Click [ S A V E Password ].

To cancel the change click [Cancel].

### **To Change Your Username (after logging in)**

Login >

Click 'Account' on the menu bar. >

Click the 'Profile' icon . >

Make changes as desired. >

Click [Save]

Notes: Your Username is NOT used for email communications and can even be a fake email. Username is only used for logging in.

Your email address in the 'Edit Contact' area is used for email communications.

## **Home: Announcements, New Requests and New Offers**

### **To Post an Announcement, Request or Offer to the Whole Exchange**

Click 'Home' on the menu bar. >

Type your message into the 'Post an Announcement:' box in the left column. > Set the expiration from today to 2 weeks if needed.

Click [Post]

Each time an announcement is replied to everyone in the thread will be copied by email. Announcements are deleted the day they are set to expire (1 to 14 days with 14 days the default.)

Each week new announcements, offers and requests created or updated in the past week are emailed to all active members.

You may opt out of this mailing in 'Account'> 'Profile' or use the UNSUBSCRIBE at the bottom of the mailing.

### **To Email Another Member**

Type any part of the member's name into the 'Search' box in the header.

Click [Search]. >

Click '# Members by name.'

Find your member and click on their 'email@address' or the 'Email Me' link. > Fill out the email form. >

Click [Send].

Notes: Anywhere in the system you see an email address or an 'Email Me' link you may email that member with the simple form that pops up. Enter a Subject and Message and click [Send].

### **To Post an Announcement to All the Members of a Group**

Click 'Groups' on the menu bar. >

Select the Group you want to message from the list of groups you are a member of. > Type your message into the 'Type your announcement into the box and click Post.' box. > Click [Post]

You and the group members will all receive an email copy of your message.

Each time a message is replied to (from here) you and the other group members will be copied by email. Messages are deleted 14 days after creation or the last reply.

### **To Reply to an Announcement**

Click 'Home' on the menu bar. >

Click the reply icon next to the message you want to reply to.>

Type your reply into the highlighted box. >

Click [Post]

Everyone in the thread will receive an email copy of the thread.

Messages are deleted the day they are set to expire (1 to 14 days with 14 days the default.)

## **To Delete an Announcement**

Select 'Home' on the menu bar. >

Click the remove icon next to the Message you want to delete. (You may only delete messages you have created.)

## **To Report Hours Exchanged**

### **To Report Hours from Scratch (start from the top of the form and work down)**

Click 'Hours' on the menu bar. >

Select if you Provided or Received. >

Enter the number of hours. >

Enter the exchange date. >

Enter the number of members Provided To or Received From >

Type in any part of the member's name(s) in each box provided. >

Select the member from the list that appears. >

Select the service category from the list provided. >

Select the service from the list that appears. >

Add a comment\* if you like. \*Only the two members involved in the transaction see comments. Click [Record Transaction!].

### **To Report Hours from an Announcement**

Click the 'Report hours on this service with this member' icon on the announcement you exchanged on. >

Select if you Provided or Received. >

Select the date of the service. >

Enter the hours. >

Select the service category from the list provided. >

Select the service from the list that appears. >

Add a comment\* if you like. \*Only the two members involved in the transaction see comments. Click [Record Transaction!]

### **To Report Hours from another member's Offer or Request**

Click the 'Report hours on this service with this member' icon on the Offer or Request you exchanged on. >

Select the date of the service. >  
Enter the hours. >

Add a comment\* if you like. \*Only the two members involved in the transaction see comments. Click [Record Transaction!]

### **To Report Hours from Your Own Offer or Request**

Click the 'Report hours on this service with this member' icon on the Offer or Request you exchanged on. >  
Type in any part of the member's name you exchanged with. >  
Select the member from the list that appears. >

Click [Continue]  
Select the date of the service. >  
Enter the hours. >  
Add a comment\* if you like. \*Only the two members involved in the transaction see comments. Click [Record Transaction!]

### **Notes:**

Click the 'See Statement' icon (on the Home, Hours or Account pages to verify your transaction if you like.  
You may delete any transaction where you were the provider, effectively giving a 'refund'. You may indicate you were not satisfied with any transaction where you were the receiver.

### **To Report Hours Exchanged Using an Existing 'Statement' Entry**

Click the 'See Statement' icon on the Home, Hours or Account pages. >  
Click the [+] next to a transaction where the provider, receiver and service are the same as what you want to record. >  
Enter the new transaction date. >  
Enter the transaction hours. >  
Click [Record Transaction!] >

### **Notes:**

You may delete any transaction where you were the provider, effectively giving a refund.  
You may indicate you were not satisfied with any transaction where you were the receiver.

### **To View your Statement**

Click the 'See Statement' icon on the Home, Hours or Account pages. > You may sort your statement by clicking on the columns (A-Z / Z-A).

### **To Print your Statement**

Click the 'See Statement' icon on the Home, Hours or Account pages. >  
Click [Make a Printer Friendly Statement] >  
Select 'File' then Click 'Print' on your browser menu to send your statement to your printer.

### **To Email your Statement**

Click the 'See Statement' icon on the Home, Hours or Account pages. > Enter a valid email address into the 'Email My Statement TO:' box.  
(It already contains your Contact Email1 address if you have one.) >  
Click [Send]

### **To Indicate Your Satisfaction With an Exchange**

Click the 'See Statement' icon on the Home, Hours or Account pages. > In the 'Satisfied' column, click to change to  
or Click to change to on the line where the transaction appears.

### **To Endorse Another Member**

Use to Endorse this member!  
Use to Remove your endorsement from this member!

### **All About Member Satisfaction and Endorsements**

When the receiver of a service is reporting hours they may indicate their satisfaction with the exchange. They may endorse the provider. Satisfaction and Endorsements are recorded separately so that members may indicate they are satisfied AND maintain their privacy (i.e. when they are a receiver of health care).

When the provider is reporting hours the system assumes the receiving member is satisfied, and will not provide an endorsement.

The providing member may delete a transaction if the receiving member is not satisfied, essentially refunding the hours earned.

The member not recording the exchange is emailed a message outlining the details of the exchange. If the member does not agree with the settings they may change them in the 'See Statement' area. (Click the 'See Statement' icon on the Home, Hours, or Account pages.) Just click on the to change it to for Satisfied or vice versa.

A heart icon will appear near any member's name, indicating the member has endorsements. Holding the mouse over the heart icon pops up the list. Clicking on the heart brings you to a page where you may call or email each endorser (one at a time).

In the provider's profile area (which other members can see) mouse over the Exchanges Made counter to see information about the number of exchanges, unique members, and percent

satisfied. Notice that Last Login or Last Transaction and Member Since are displayed on this page as well. All of this information can help you decide if this is a member you'd want to exchange with.

## **To Add Service Offers**

Click 'Home' on the menu bar. >

Click the Add Offers icon >

Click on a Category >

Scroll through the list and click the [] checkbox next to any service you'd like to offer. > Click [Add to My Offers] (You may add multiple services at once.) >

Now add Service Descriptions. >

Click [Save All Changes] to save your changes.

On any service listing in the system you may use the icon to add that service to your profile. You may add multiple services and descriptions at once. **Your service descriptions get searched when other members are looking for a service.**

## **To Add Service Requests**

Click 'Home' on the menu bar. >

Click the Add Requests icon >

Click on a Category >

Scroll through the list and click the [] checkbox next to any service you'd like to request. >

Click [Add to My Requests] (You may add multiple services at once.) >

Now add Service Descriptions. >

Click [Save All Changes] to save your changes.

**Service descriptions get searched when members are looking for your service!**

On any service listing in the system you may use the icon to add that service to your profile.

## **To Attach an Image to a Service Offer**

Click 'Home' on the menu bar. > Click the 'Edit my offers' icon >

Click the Add Image icon on the service you want to work with. > Click [Browse] and locate the jpg, gif, or png image you want to attach. > Click [Upload Image] (Use an image less than 2MB)

## **To Remove an Image from a Service Offer**

Click 'Home' on the menu bar. >

Click the 'Edit my offers' icon >

Click the Remove Image icon next to the service image you want to remove. >

## **To Add or Edit a Service Description**

Click 'Home' on the menu bar. >

Click the 'Edit my offers' icon or the 'Edit my requests' icon > Locate the service to edit. >

Enter and edit the service description. >

Click [Save All Changes]

## **To Edit Your Account (Name, Address, Bio, etc.)**

Click 'Account' on the menu bar. >

Click the 'Profile' icon . > Make changes as desired. > Click [Save]

Notes: If you add an 'Address' type contact in your 'edit contact info' area THIS address will be used to create a Google Map link.

Your username is NOT used as your contact email address. The 'Email1' type contact in your 'edit contact info' area is.

## **To Print Your Member ID Card**

Click 'Account'. >

Click the 'Profile' icon . >

Click [Print your Member ID Card]. > Click {File}-{Print} on your browser menu.

## **To Add New Contact Information**

Click 'Account' on the menu bar. >

Click the 'Edit Contact' icon . >

Select the 'Type' of contact information to be added. >

Enter the contact information in the 'Contact' box. >

Select [No] or [Yes] if you want the information to be 'Private' (only visible to admins.). > Click [Add Contact Info]

Notes: Set Type = Address to add a Goole Map link.

(It will use the address in your 'Account' area, not what you enter here.

Set Type = Website to create a link to your own website if you have one.

Set Type = Facebook to enter a link to your Facebook account.

Set Type = Video1 or Video2 to add links to web-based video you have uploaded (like YouTube).

## **To Edit Existing Contact Information**

Click 'Account' on the menu bar. >

Click the 'Edit Contact' icon . >

Edit the contact information to be changed in the 'Contact' box. > Click [Save] >

Click or to set the information to be 'Private' or not. >

Notes: Administrators have access to your private contact information. Other members do not. If your email is set to private other members will see an 'Email Me' link instead of your address and may still contact you. If you reply to them from your own email client, they will then have your address.

## **View your 'Account' (What your account looks like to other members.)**

Click 'Account' on the menu bar. Your profile page will look just like this but without the row of links at the top.

Notes: You may include a Google Map link to your address, a link to your website, and or email address. (see 'To Add New Contact Information'.) You may include images with your offers (see 'Offers').

You may include an image for this page. (see 'Account'.)

## **To View the Groups You are in, or to Join or Leave a Group**

Click 'Groups' on the menu bar. >

Click [x] next to the group you want to leave. > Click [Add] next to any group you'd like to join.

To view the other members in a group mouse over or click on the number next to the group. You may post a message (and email) to all of the members of a group you are in.

## **To View the Other Members in a Group You are In**

Click 'Groups' on the menu bar. >

Mouse over or click on the number next to the group.

Notes: You may post a message (and email) to all of the members of a group you are in. Use {File}-{Print} in your browser menu to print the list of group members.

## **To Add an Image to Your Account.**

Click 'Account' on the menu bar. >

Click on the image icon, or on your existing image. >

Click Browse... to choose a jpg, png or gif image file from your computer. > (Must be under 2MB)

Click [Upload Image] (**Use an image less than 2MB in size.**)

## **To SEARCH the Whole Exchange**

## Names, Bios, Announcements, Offers, Requests & Help

Type one or more search terms into the search box. (Add a zip or town to limit further.) >  
Click [Search] >

Click the appropriate link(s) to display results.

Notes: See how Search works! 3 letter words are omitted. Beck\* will return names like Becky, Beckett, Becker and so on. Adding a town name or zip/postcode will limit to that town!

### How SEARCH works:

Notes: The search capability supports the following operators:

- + A leading plus sign indicates that this word must be present in each row that is returned.
- - A leading minus sign indicates that this word must not be present in any of the rows that are returned. Note: The minus operator acts only to exclude rows that are otherwise matched by other search terms. Thus, a search that contains only terms preceded by - returns an empty result. It does not return 'all rows except those containing any of the excluded terms.'
- > < These two operators are used to change a word's contribution to the relevance value that is assigned to a row. The > operator increases the contribution and the < operator decreases it.
- ( ) Parentheses group words into sub-expressions. Parenthesized groups can be nested.
- ~ A leading tilde acts as a negation operator, causing the word's contribution to the row's relevance to be negative. This is useful for marking 'noise' words. A row containing such a word is rated lower than others, but is not excluded altogether, as it would be with the - operator.
- \* The asterisk serves as the truncation (or wildcard) operator. Unlike the other operators, it should be appended to the word to be affected. Words match if they begin with the word preceding the \* operator. If a word is specified with the truncation operator, it is not stripped from a boolean query. This occurs because the word is not seen as too short or a stopword, but as a prefix that must be present in the document in the form of a word that begins with the prefix.
- " A phrase that is enclosed within double quote (""") characters matches only rows that contain the phrase literally, as it was typed. The full-text engine splits the phrase into words and performs a search in the FULLTEXT index for the words. Nonword characters need not be matched exactly: Phrase searching requires only that matches contain exactly the same words as the phrase and in the same order. For example, 'test phrase' matches 'test, phrase'. If the phrase contains no words that are in the index, the result is empty. For

example, if all words are either stopwords or shorter than the minimum length of indexed words, the result is empty.

- The following examples demonstrate some search strings that use boolean full-text operators:

'+apple +juice' or 'apple banana' Find rows that contain both words.

'+apple -macintosh' Find rows that contain the word 'apple' but not 'macintosh'.

'+apple ~macintosh' Find rows that contain the word 'apple', but if the row also contains the word 'macintosh', rate it lower than if row does not. This is "softer" than a search for '+apple -macintosh', for which the presence of 'macintosh' causes the row not to be returned at all.

'+apple +(>turnover <strudel)' Find rows that contain the words 'apple' and 'turnover', or 'apple' and 'strudel' (in any order), but rank 'apple turnover' higher than 'apple strudel'.

'apple\*' Find rows that contain words such as 'apple', 'apples', 'applesauce', or 'applet'.  
'"some words"' Find rows that contain the exact phrase 'some words' (for example, rows that contain 'some words of wisdom' but not 'some noise words'). Note that the "" characters that enclose the phrase are operator characters that delimit the phrase. They are not the quotation marks that enclose the search string itself.

## **To Explore Member Offers Method One:**

Type one or more search terms into the search box on the menu bar. > Click [Search]. >  
Click the (#) Providers in (#) Categories link.

### **Method Two:**

Click 'Offers' on the menu bar. >

Click on a Service Category in the list. > Click on a Service in the list.

### **Method Three:**

Click 'Offers' on the menu bar. >

Click [Browse Offers Directory] to see the entire service directory.

## **To View, Print or Email the Member Offers Directory**

Click 'Offers' on the menu bar. >

Click [Browse Offers Directory] to see the entire service directory. >

Click [Email a Copy] to send yourself the directory or click [Print a Copy] to print it.

## **Search Member Requests**

### **Method One:**

Type one or more search terms into the search box on the menu bar. > Click [Search]. >  
Click the (#) Receivers in (#) Categories link.

**Method Two:**

Click 'Requests' on the menu bar. > Click on a Service Category in the list. > Click on a Service in the list.

**To View, Print or Email the Member Requests Directory**

Click 'Requests' on the menu bar. >

Click [Browse Requests Directory] to see the entire service directory. >

Click [Email a Copy] to send yourself the directory or click [Print a Copy] to print it.)