Group C

User manual – User login

**- Login**

1. Open web browser and enter web address in URL bar (<http://lmc.markgoodwinconsulting.com/login.php>)
   1. “Louisville Master Chorale Web Portal” page appears
2. In the “Userid” text box enter in your user name (mark)
3. In the “Password” text box enter in your Password (mark)
4. Click the “Log in” button
   1. The “Louisville Master Chorale Web Portal” page appears with a tab bar with the following tabs: “Home, Contacts, Donations, Committees, Events”
   2. Also the “Logout” button appears in the top right corner
5. The user is now logged into the web page

* **Contacts tab – Print contacts page**
  + All steps following assume the user is currently logged in as a basic user.

1. Click on the “Contacts” tab shown at the top of the page
   1. A drop down box appears with the options: “Print contacts, Create mail merge table, add contact, and edit contact”
2. Click on the “Print Contacts” option
   1. The “Print Contacts” page appears with the text “Select Contacts to be printed” on top and all contacts listed. Each contact has a check box to the left of their name as well as various check boxes under the column headers: “Board Member, Performer, Donor, Customer, and Advertiser”
3. Select the “Board Member” checkbox shown at the top of the table.
   1. The checkbox next to the name of each Board Member is checked
4. Uncheck the “Board Member” Check box and select the “Performer” Checkbox
   1. The checkbox next to the name for each performer is checked
5. Uncheck the “Performer” checkbox and select the “Donor” checkbox
   1. The checkbox next to the name of each Donor is checked
6. Uncheck the “Donor” checkbox and select the “Customer” checkbox
   1. The checkbox next to the name of each customer is checked
7. Uncheck the “Customer” checkbox and select the “Advertiser” checkbox
   1. The checkbox next to the name of each advertiser is checked
8. Uncheck the “Advertiser” checkbox and select the checkbox located next to the text “ID” in the top left corner of the contacts table.
   1. Every checkbox next to the contact names and column header checkboxes are now checked
9. Uncheck all checkboxes by unchecking the previously select checkbox
   1. The contacts table is completely unchecked
10. Using the mouse, select the “Filter by last name” text box at the top of the page
11. Begin typing in the word “Goodwin” into the text box
    1. As you type in the letters of the last name the contacts table begins to filter according to the last name you enter.
    2. Once the entire word is entered the only options left should be: “Crystal Goodwin” and “Mark Goodwin”
12. Finally select the first five checkboxes next to the name of each person and then click the “Print” button located to the right of the “Filter by last name text box”
    1. All contact information should printed to a separate page showing each person’s: “Id number, Name, address, home phone, Work phone, Cell phone, Do not call (Y or N), email address, Do not spam (Y or N), as well as any other information connected with that person.
13. Exit the page by clicking the “Logout” button in the top right corner
    1. A message appears that says, “You have been logged out. Thank you for using the Louisville Master Chorale Web Portal.”

* **Contacts page – Create Mail Merge Table**
  + All steps following assume the user is currently logged in as a basic user.

1. Click on the “Contacts” tab shown at the top of the page
   1. A drop down box appears with the options: “Print contacts, Create mail merge table, add contact, and edit contact”
2. Click on the “Create Mail Merge Table” option
   1. The “Mail Merge” page appears with the text “Select Contacts to add to Mail Merge Table” on top and all contacts listed. Each contact has a check box to the left of their name as well as various check boxes under the column headers: “Board Member, Performer, Donor, Customer, and Advertiser”
3. Select the “Board Member” checkbox shown at the top of the table.
   1. The checkbox next to the name of each Board Member is checked
4. Uncheck the “Board Member” Check box and select the “Performer” Checkbox
   1. The checkbox next to the name for each performer is checked
5. Uncheck the “Performer” checkbox and select the “Donor” checkbox
   1. The checkbox next to the name of each Donor is checked
6. Uncheck the “Donor” checkbox and select the “Customer” checkbox
   1. The checkbox next to the name of each customer is checked
7. Uncheck the “Customer” checkbox and select the “Advertiser” checkbox
   1. The checkbox next to the name of each advertiser is checked
8. Uncheck the “Advertiser” checkbox and select the checkbox located next to the text “ID” in the top left corner of the contacts table.
   1. Every checkbox next to the contact names and column header checkboxes are now checked
9. Uncheck all checkboxes by unchecking the previously select checkbox
   1. The contacts table is completely unchecked
10. Using the mouse, select the “Filter by last name” text box at the top of the page
11. Begin typing in the word “Goodwin” into the text box
    1. As you type in the letters of the last name the contacts table begins to filter according to the last name you enter.
    2. Once the entire word is entered the only options left should be: “Crystal Goodwin” and “Mark Goodwin”
12. Finally select the first five checkboxes next to the name of each person and then click the “Create table” button located to the right of the “Filter by last name text box”
    1. A “Recent Activity” page appears and shows the Date/time that the table was created, along with the user and activity performed.
13. Exit the page by clicking the “Logout” button in the top right corner

* **Contacts tab – Add contact**
  + All steps following assume the user is currently logged in as a basic user.

1. Click on the “Contacts” tab shown at the top of the page
   1. A drop down box appears with the options: “Print contacts, Create mail merge table, add contact, and edit contact”
2. Click on the “Add Contact” option
   1. The “Add Contact” page appears with the text “Add Contact” on top of the page. Under the text at the top of the page there are three checkboxes for: “Board Member, Performer, and advertiser”
   2. The Page has text boxes for: “First name, Middle Initial, Last Name, Home address, Home City, Home State, Home Zip code, Email address, Home Phone, Work Phone, Cell Phone” as well check boxes: “Don’t Spam” and “Don’t Call”
   3. At the bottom of the page the “Cancel” and “Save” buttons are available.
3. Check the “Board Member” check box in the top left corner of the page
   1. Additional fields appear to the right of the page: “Work Address, Work City, Work State, Work Zip Code, Board Start Date, Rotate Off Board Date, Office”
4. Check the “Performer” checkbox in the top left corner of the page
   1. Additional fields appear under the “Board Member” fields on the right side of the page: “Section, Section Leader”
5. Check the “Advertiser” checkbox under the “Performer” checkbox in the top left corner of the page
   1. Additional fields appear to the right under the “Last Name” Textbox that says: “Business name”
   2. All three of the checkboxes should be checked in the top left corner
6. Uncheck the “Board Member” checkbox that is located in the top left corner of the page
   1. The Board Member additional textboxes disappear which causes the Performer additional textboxes to move to the top right of the page: “Section and Section Leader”
7. Uncheck the Advertiser checkbox that is located in the top left corner of the page
   1. The “Business Name” textbox disappears and the original “Add Contact” page is displayed
8. Populate all of the required fields displayed on the page
   1. All fields should be filled
9. Select the “Save” button
   1. The “Recent Activity Page” appears displaying the “Added contact for (your name)” with the current date and time.
10. Click on the “Contacts” tab shown at the top of the page
    1. A drop down box appears with the options: “Print contacts, Create mail merge table, add contact, and edit contact”
11. Click on the “Add Contact” option
    1. The “Add Contact” page appears with the text “Add Contact” on top of the page. Under the text at the top of the page there are three checkboxes for: “Board Member, Performer, and advertiser”
    2. The Page has text boxes for: “First name, Middle Initial, Last Name, Home address, Home City, Home State, Home Zip code, Email address, Home Phone, Work Phone, Cell Phone” as well check boxes: “Don’t Spam” and “Don’t Call”
12. Populate all required fields displayed on the page
    1. All fields are filled
13. Click the “Cancel” button at the bottom left corner of the page
    1. The “Home” page appears
14. Click the “Logout” button in the top right corner of the page
    1. A white page appears with the message “You have been logged out. Thank you for using the Louisville Master Chorale Web portal.”
15. The user is now logged out

* **Contacts tab – Edit Contact**
  + All steps following assume the user is currently logged in as a basic user.

1. Click on the “Contacts” tab shown at the top of the page
   1. A drop down box appears with the options: “Print contacts, Create mail merge table, add contact, and edit contact”
2. Click on the “Edit Contact” option
   1. The “Edit Contact” page appears with the text “Select Contact to be Edited” on top of the page. Under the text at the top of the page there is a “Filter By Last Name” text box and a table showing all of the contacts along with the headers: “ID, First Name, Last Name, Board Member, Performer, Donor, Customer, and advertiser”
3. Using the mouse, select the “Filter by last name” text box at the top of the page
4. Begin typing in the word “Goodwin” into the text box
   1. As you type in the letters of the last name the contacts table begins to filter according to the last name you enter.
   2. Once the entire word is entered the only options left should be: “Crystal Goodwin” and “Mark Goodwin
5. Click on the name of Mark Goodwin from the table
   1. The “Edit Add Contact” page appears with the text “Edit Contact” at the top of the page.
6. The page displays the person’s contact information and the fields are populated with the contact’s information
   1. All of the textboxes are populated with the information the person has given before
7. Click the “Don’t Call” checkbox at the bottom of the page
   1. The checkbox is now checked
8. Click the “Save” button at the bottom of the page
   1. The Home page is displayed with the updated activity
9. Click on the “Contacts” tab shown at the top of the page
   1. A drop down box appears with the options: “Print contacts, Create mail merge table, add contact, and edit contact”
10. Click on the “Edit Contact” option
11. The “Edit Contact” page appears with the text “Select Contact to be Edited” on top of the page. Under the text at the top of the page there is a “Filter By Last Name” text box and a table showing all of the contacts along with the headers: “ID, First Name, Last Name, Board Member, Performer, Donor, Customer, and advertiser”
12. Click on the name of Mark Goodwin from the table
    1. The “Edit Add Contact” page appears with the text “Edit Contact” at the top of the page.
13. The page displays the person’s contact information and the fields are populated with the contact’s information
    1. All of the textboxes are populated with the information the person has given before
14. Click the Cancel button at the bottom right corner of the screen
    1. The home page appears
15. Click the Logout button in the top right corner of the page
    1. A white page appears with the message “You have been logged out. Thank you for using the Louisville Master Chorale Web portal.”
16. The user is now logged out

* **Donations tab – Add Donation**
  + All steps following assume the user is currently logged in as a basic user.

1. Click on the “Donations” tab shown at the top of the page
   1. A drop down box appears with the options: “Add Donation and Edit Donation”
2. Click on the “Add Donation” option
   1. The “Add Donation” page appears with the text “Add Donation” on top of the page. Below the text there are text boxes for the following fields: “Date, Donor(s), Monetary Donation, Non-Monetary Donation, Acknowledgement, Comment”. As well as the buttons: “Cancel” and “Save”
3. Populate all of the available fields
   1. All textboxes are filled
4. At the bottom of the page click the “Save” button
   1. The Home page is displayed and the Recent Activity has been updated showing the new donation
5. Click on the “Donations” tab shown at the top of the page
   1. A drop down box appears with the options: “Add Donation and Edit Donation”
6. Click on the “Edit Contact” option
   1. The “Add Donation” page appears with the text “Add Donation” on top of the page. Below the text there are text boxes for the following fields: “Date, Donor(s), Monetary Donation, Non-Monetary Donation, Acknowledgement, Comment”. As well as the buttons: “Cancel” and “Save”
7. Click on the “Cancel” button at the bottom of the page
   1. The home page appears
8. Click the Logout button
   1. A white page appears with the message “You have been logged out. Thank you for using the Louisville Master Chorale Web portal.”
9. The user is now logged out

* **Donations tab – Edit Donations**

1. Click on the “Donations” tab shown at the top of the page
   1. A drop down box appears with the options: “Add Donation and Edit Donation”
2. Click on the “Edit Donation” option
3. The Donation page appears
   1. The page has text on the top of the page that says, “Select Donation To Be Edited” and below that, a table of all the donations is show.
4. Click on the first donation listed in the table
   1. The “Add Donation” page appears with the text “Add Donation” on top of the page. Below the text there are text boxes for the following fields: “Date, Donor(s), Monetary Donation, Non-Monetary Donation, Acknowledgement, Comment”. As well as the buttons: “Cancel” and “Save”
5. Click the “Cancel” button at the bottom left corner of the page
   1. The home page appears
6. Click on the “Donations” tab shown at the top of the page
   1. A drop down box appears with the options: “Add Donation and Edit Donation”
7. Click on the “Edit Donation” option
8. The Donation page appears
   1. The page has text on the top of the page that says, “Select Donation To Be Edited” and below that, a table of all the donations is show.
9. Click on the first donation listed in the table
   1. The “Add Donation” page appears with the text “Add Donation” on top of the page. Below the text there are text boxes for the following fields: “Date, Donor(s), Monetary Donation, Non-Monetary Donation, Acknowledgement, Comment”. As well as the buttons: “Cancel” and “Save”
10. Add your full name in the Comment text box
    1. Your name is successfully entered into the “Comment” textbox
11. Click the “Save” button at the bottom of the page
    1. The home page appears and the activity is updated
12. Click the “Logout” button in the top right corner of the page
    1. A white page appears with the message “You have been logged out. Thank you for using the Louisville Master Chorale Web portal.”
13. The user is now logged out

* **Committees tab – Add Committee**
  + All steps following assume the user is currently logged in as a basic user.

1. Click on the “Committees” tab shown at the top of the page
   1. A drop down box appears with the options: “Add Committee, Edit Committee, and Delete Committee”
2. Click on the “Add Committee” option
3. The “Add Committee” page appears
   1. The page has text on the top of the page that says, “Add Committee” and below that, a table of all the Committee members is show.
   2. Each contact has a check box to the left of their name as well as various check boxes under the column headers: “Board Member, Performer, Donor, Customer, and Advertiser”
4. Select the “Board Member” checkbox shown at the top of the table.
   1. The checkbox next to the name of each Board Member is checked
5. Uncheck the “Board Member” Check box and select the “Performer” Checkbox
   1. The checkbox next to the name for each performer is checked
6. Uncheck the “Performer” checkbox and select the “Donor” checkbox
   1. The checkbox next to the name of each Donor is checked
7. Uncheck the “Donor” checkbox and select the “Customer” checkbox
   1. The checkbox next to the name of each customer is checked
8. Uncheck the “Customer” checkbox and select the “Advertiser” checkbox
   1. The checkbox next to the name of each advertiser is checked
9. Uncheck the “Advertiser” checkbox and select the checkbox located next to the text “ID” in the top left corner of the contacts table.
   1. Every checkbox next to the contact names and column header checkboxes are now checked
10. Uncheck all checkboxes by unchecking the previously select checkbox
    1. The contacts table is completely unchecked
11. Using the mouse, select the “Filter by last name” text box at the top of the page
12. Begin typing in the word “Goodwin” into the text box
    1. As you type in the letters of the last name the contacts table begins to filter according to the last name you enter.
    2. Once the entire word is entered the only options left should be: “Crystal Goodwin” and “Mark Goodwin”
13. Delete “Goodwin” from the textbox
    1. The “Filter By Last Name” text box is now empty
14. Using the mouse, select the “Committee Name” text box at the top of the page
15. Type in “Committee 1” in the text box
16. Finally select the first five checkboxes next to the name of each person and then click the “Save” button located to the right of the “Filter by last name text box”
    1. A “Recent Activity” page appears and shows the Date/time that the table was created, along with the user and activity performed.
17. Exit the page by clicking the “Logout” button in the top right corner
    1. A white page appears with the message “You have been logged out. Thank you for using the Louisville Master Chorale Web portal.”
18. The user is now logged out

* **Committees tab – Edit committee**
  + All steps following assume the user is currently logged in as a basic user.

1. Click on the “Committees” tab shown at the top of the page
   1. A drop down box appears with the options: “Add Committee, Edit Committee, and Delete Committee”
2. Click on the “ Edit Committee” option
3. The “Edit Committee” page appears
   1. The page has text on the top of the page that says, “Select Committee to be Edited” and a Committee table with all of the committees listed below,
4. Click on the Committee: “Performer Recruiting Committee”
   1. The “Edit Committee” page appears with the table of all possible contacts
   2. The contacts that are currently in the “Performer Recruiting Committee” have a checked, checkbox next to their name
5. Click the “Save” button at the top of the page
   1. The home page appears with the recent activity updated
6. Click the “Logout” button in the top right corner of the page
   1. A white page appears with the message “You have been logged out. Thank you for using the Louisville Master Chorale Web portal.”
7. The user is now logged out

* **Committees tab – Delete Committee**
  + All steps following assume the user is currently logged in as a basic user.

1. Click on the “Committees” tab shown at the top of the page
   1. A drop down box appears with the options: “Add Committee, Edit Committee, and Delete Committee”
2. Click on the “ Delete Committee” option
3. The “Delete Committee” page appears
   1. The page has text on the top of the page that says, “Select Committee to be Deleted”, and a Committee table with all of the committees listed below with a “Delete” button next to them.
4. Click the “Delete” button next to the “Performer Recruiting Committee”
   1. A pop up message appears that says: “Are you sure you want to delete the committee?”
5. Click “OK”
   1. The “Select Committee to be Deleted” page refreshes and the “Performer Recruiting Committee” is not longer visible
6. Click the “Logout” button in the top right corner of the page
   1. A white page appears with the message “You have been logged out. Thank you for using the Louisville Master Chorale Web portal.”
7. The user is now logged out

* **Events tab – Add Event**
  + All steps following assume the user is currently logged in as a basic user.

1. Click on the “Events” tab shown at the top of the page
   1. A drop down box appears with the options: “Add Event and Edit Event”
2. Click on the “ Add Event” option
3. The “Add Event” page appears
   1. The page has text on the top of the page that says, “Add Event”
   2. Below the text is a table of “Event Details” which includes: “Title, Location, Date, Private Notes, and Public Notes” textboxes. As well as drop down boxes for: “Type” and “Group” and the “Save” button
4. Populate all of the required fields
   1. All of the textboxes are filled
5. Click on the “Type” drop down box
   1. The options: “Meeting” and “Rehearsal” appear
6. Click on the “Rehearsal” option
7. Click on the “Group” drop down box
   1. The “None” and “Board Members” options appear
8. Select the “Board Members” option
9. Click on the “Notify Group” checkbox
   1. The checkbox is checked
10. Click the “Save” button at the bottom of the page
    1. The home page appears with the Recent Activity table updated
11. Click the “Logout” button in the top right corner of the page
    1. A white page appears with the message “You have been logged out. Thank you for using the Louisville Master Chorale Web portal.”
12. The user is now logged out

* **Events tab – Edit event**
  + All steps following assume the user is currently logged in as a basic user.

1. This page is not yet functional