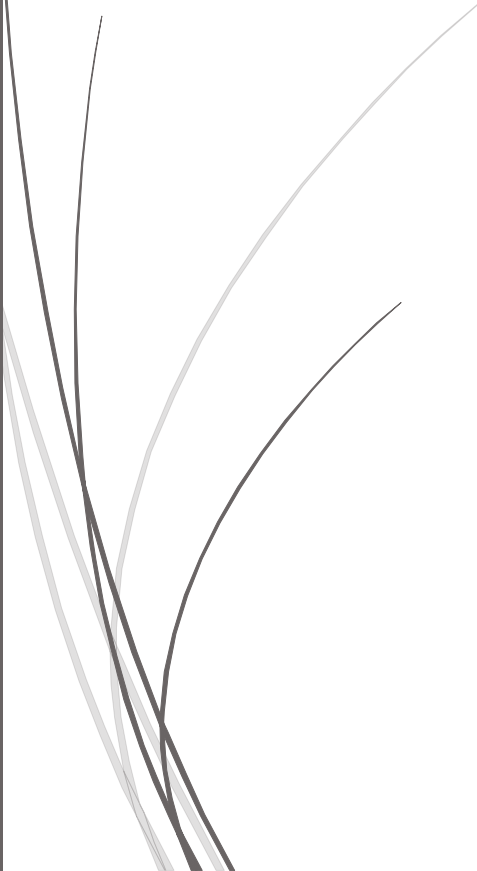




MusicFestivalSuite.com

Administration Manual



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WINDSOR GRAPHICS
Taking care of business.



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mf's Profiles Administration

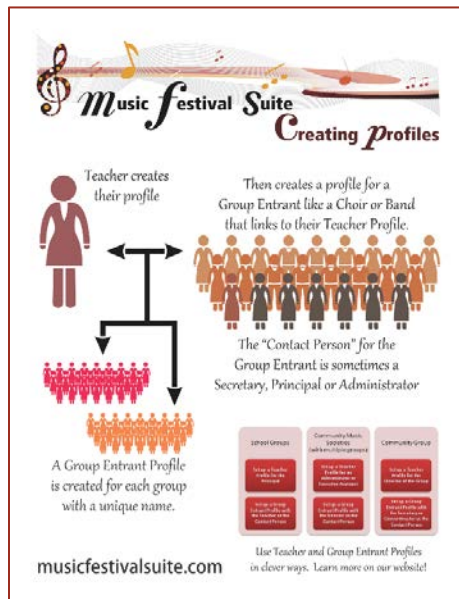
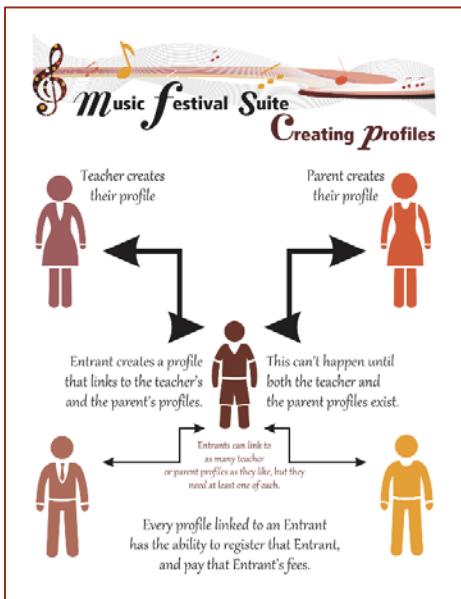
Managing Users and How They Interact with MusicFestivalSuite.com

The use of User Profiles is a key reason why MusicFestivalSuite.com was developed. It permits people to register themselves, their children, their students, and to only have to process a single payment all while maintaining their privacy and security. Managing Users is accomplished through the “Profiles Admin” screens.

Users choose the ways they want to participate in your festival. They can participate as an Entrant, Teacher, Parent, Accompanist, Volunteer, Adjudicator, or any combination thereof. All Entrant Profiles are linked to a Teacher and, if they are an individual under the age of 18, a Parent. All other profiles are standalone and do not require being linked to another profile. The reason each Entrant is required to identify a Teacher is that the Teacher is the one responsible for understanding the Syllabus and the Festival’s Rules. Those under 18 also need to get parental consent to participate, and so linking to a Parent Profile is what provides that consent.

For those who choose to participate as an Entrant, there are two Profile Types; Individual Entrants would likely enter in solo, duet or smaller ensemble classes in a festival. Group Profiles are specifically for Entrants only where the entrant is not an individual but rather a larger group such as a Choir, Band or similar.

The following Infographics help not only Users, but also Administrators know how the Profile system works for MusicFestivalSuite.com.



To view the details of a Profile, go to the “List of Profiles” screen in the “Profiles Admin”. The complete List of Profiles will be shown. Select the Profile you wish to view details of by double-clicking on their name, or on a touch-screen device click once on the name, and then choose the “Select” button. Once selected, the contact information of the Profile will be shown, along with a list of every registration linked to that Profile.

Users log into their Profiles using either their Profile ID or their email address combined with their password. If multiple Users have created profiles with the same email address, they must use the correct password, or their login will not take them to the correct account. Users can at any time request MusicFestivalSuite.com send them a password reminder, and seldom do Administrators need to manage that process.



Profiles Administration

Helping Users Create Their Profiles

When a User creates their profile, MusicFestivalSuite.com automatically sends them an email with a confirmation link. Until a User confirms their email address, their profile is not listed in the “List of Profiles” view, but rather it remains in “Pending” status for 72 hours. After those 72 hours have passed, the profile is considered invalid and is automatically removed from MusicFestivalSuite.com.

Oftentimes a User can overlook this confirmation step and wonder why they are unable to access their profile. If you are approached by a User who feels as though their new profile doesn't work, the first place to look is in the “Pending” view in “Profiles Admin”. Inside that “Pending” view, if you see their name, it means they have not yet clicked on the confirmation link. If they did not receive that confirmation link, confirm the correct email address, and then resend the Confirmation Email by using the button provided. These emails skip the Email Queue mentioned on pages 19 and 26.



Profiles Administration

Users Who Have Created Too Many Profiles

Any myriad of issues can prompt a User to decide to create additional profiles even after they already have one. Oftentimes this comes from forgetting a previous password, losing access to an email address, or simply not understanding that they are allowed to participate in multiple roles with a single profile. When this happens, it is always best to simplify things for yourself and for MusicFestivalSuite.com.

This is when you may choose to “Amalgamate” duplicate profiles. In this screen within Profiles Admin, MusicFestivalSuite.com will identify potential duplicates. Some duplicate entries escape MusicFestivalSuite.com detection, but this feature does find many User Profiles that may be duplicates.

When duplicates are amalgamated, all information from the current and previous years' festivals are copied into the target profile, as are the different ways the User has chosen to participate in the festival across each profile. The only data lost is the older profile's contact information, which gets replaced with the target profile's contact information.

The steps for solving duplicate profiles is as follows;

1. Identify which of the two duplicates are the most recent and therefore have the most relevant contact information. This is your target profile. Take note of the Profile IDs of both the older profile and the target profile.
2. Go to the “Amalgamate” view in the “Profiles Admin”. Enter the Profile ID of the older profile in the “Amalgamate From” box.
3. Enter the Profile ID of the target profile in the “Amalgamate To” box.
4. You can choose to tell MusicFestivalSuite.com not to send a notification email to the User indicating that the profile has been merged with another profile. To do so, click the “Do Not Send Notification Email” checkbox. Leaving this checkbox blank will tell MusicFestivalSuite.com to send the notification email.
5. Click the “Amalgamate” button. If you change your mind, make sure to click the “Cancel” button. Amalgamation cannot be undone.
6. Always confirm your work has been done the way you want. Return to the “List of Profiles” view to confirm the amalgamation occurred in the manner you wanted.

If a user continues to create too many profiles despite your instructions, see “Freezing Profiles” later in this manual.



Profiles Administration

All About Privacy



Organizations that operate music festivals in Canada are subject to two laws regarding privacy; the Personal Information Protection and Electronic Documents Act (PIPEDA) and Canada's Anti-Spam Law (CASL). Provincially, festivals may be subject to other legislation as well. These legislations dictate how an organization should handle user information so that users feel as though their personal information is protected, secure, and will not be abused. It is every festival's responsibility to know key components of this legislation, including what the penalties are for breaching privacy.

MusicFestivalSuite.com is designed to prevent accidental privacy breaches, and to keep personal information secured. Our Privacy Policy on our website describes how we do this. **We highly recommend using MusicFestivalSuite.com for all your communication to your festival stakeholders.** Let us manage your privacy law compliance, so that you can focus on doing what you are so good at – providing incredible musical experiences for our youth.



Profiles Administration

Sending Password Reminders

Near the beginning of a festival season, Users may desire a reminder of their logon credentials. Sending everyone a password reminder is a proactive way of making sure your Users are mindful of the festival season. We call these reminders "Lookups" in MusicFestivalSuite.com. Sending a password reminder to every User is called a "Batch Lookup".

When you choose to look at the "Batch Lookup" view in "Profiles Admin", you can choose if you want a copy of such an email sent to your festival's email address as it has been stored in your Subscription Admin, and which Profiles will receive this Lookup, based on how the Users indicate they participate in the festival. Once you click any of these checkboxes, a large box appears where you can enter your own custom message, such as syllabus changes, festival dates and deadlines, or an exciting welcome message.

[Sending a Password Reminder, or Lookup, to a Single Profile](#)

On occasion you may wish only to send a Lookup to a single Profile as opposed to every existing Profile. To do so, locate that profile in the "List of Profiles" view of "Profiles Admin". Near the top of their contact information you will see a small button that says "Send Lookup". Clicking on this button will immediately send a message to that User reminding them of their password. The limitation is that you cannot send a custom message along with that Lookup email. These emails skip the Email Queue mentioned on pages 19 and 26.

NOTE: Users have the capacity to change their own passwords and generate their own Single-Profile Lookups if they so choose. They can do so if they have their User ID or their email address if it is not attached to multiple profiles.



Profiles Administration

Mailing Lists and Phone Lists

In some instances, it is better to send mail by traditional Canada Post or to make phone calls to get your information out. In such cases, accessing the "Contact Info" view in the "Profiles Admin" section will give you an easy-to-use list of that information to be able to generate your mailing lists or phone lists.

CAUTION: Be very careful about where and how you share the information generated from this feature, and never include it an email, even to a volunteer who has signed a waiver.



Profiles Administration

Sending Emails

As discussed in the previous section, MusicFestivalSuite.com protects your organization from accidental privacy breaches by being your main method of communication with stakeholders through our “Email Composer”.

Here is a step-by-step process for sending emails to your Entrants, Parents, Teachers, Adjudicators and/or Accompanists.

1. Determine if you intend to send an email to every person who has ever had a profile, or if you’d rather send an email only to those who have registered this year. If you wish to send to all profiles, go to “Profiles Admin”. If you only want to send to those who have registered this year, go to “Registration Admin”.
NOTE: Emails are only sent to Active Profiles. If a User has deactivated their profile, they will not receive any communications, regardless of which choice you make at this step. This is how MusicFestivalSuite.com adheres to Canada’s Anti-Spam Law (CASL). For more information about deactivating profiles, see the “Other Data Cleanup Methods” section in this chapter.
2. Select “Email Composer”.
3. Enter your Subject.
4. Choose whether you wish to send a copy to your festival’s email address as identified in Subscription Admin. Some festivals choose to send a copy so that they can have a copy of the email for backup purposes. Others choose not to send a copy because they don’t want to fill up their inbox with emails to themselves.
5. Identify which groups you want to send your email to. Most often festivals choose to send emails to Parents or Teachers, not to the Entrants themselves, as many Entrants are underage, and therefore it’s the adults interacting with MusicFestivalSuite.com.
 - a. If you are in the Registration Admin’s Email Composer, it will also offer you the opportunity to send emails to any registrations that are still missing payment or registrations where the Piece Title includes “To Be Announced” or “TBA” entries. This gives you the opportunity to send reminders prior to the close of registrations to submit payment or to correct TBA registrations to include the correct titles.
 - b. In the Registration Admin’s Email Composer, you will also be able to identify in some cases if you want to send emails to everyone who has registered in the entire festival, within a specific category or discipline, or even within a single class. This allows you to target your email communications effectively. The Email Composer will then show you how many people you have targeted in your email communication.
6. A large box will appear for you to enter the body of your email. Please note that the Email Composer does not permit any special formatting at this time such as Bold/Italic font, font changes, or lists. Your Email Composer is designed to be in plain text so that there is no question that every user will be able to read your emails. If you wish to provide additional formatting, it is recommended that you attach a link to such a document that is posted on your festival’s website.
7. Once you have confirmed everything is as you wish it to be, click on the “Check Inputs” button. The purpose of this button is to ensure you have included information that every email recipient will be able to read and understand. If any corrections are required, the Email Composer will tell you. If there are no corrections, the “Check Inputs” button will be replaced with a “Send Email” button.
8. Pressing the “Send Email” button will send the email with the Subject and Message that you have written to the emails you have targeted. Once you click this button, your emails will be entered into the queue for sending!

NOTE: The Email Queue will only send a certain number of emails at a given time. If you choose to send more emails than can be sent at once, the extras will be entered into an Email Queue that you can then send later.

NOTE: It is highly recommended to use mass email communication as minimally as possible. This will ensure both maximum efficiency for getting your message across as well as reducing any possibility of being considered “Spam”.



Profiles Administration

Emptying the Email Queue

MusicFestivalSuite.com uses an Email Queue to send your emails in order to keep the subscription cost low. On occasion, you will see a message that asks you to send any emails that are in a queue. This occurs when you have composed an email targeting more recipients than the Internet permits during a given period, and therefore have extras that are “sitting in the queue” waiting to be sent. When you click to send out emails in the Email Queue, it will send as many as it can, and leave any extras in the Email Queue for processing in the future.



Profiles Administration

Linked Profiles

Sometimes it is important to see which of your Users are connected to whom. Recall that Entrants Profiles must be linked to a Teacher’s Profile, and if the Entrant is under 18 years of age they must also be linked to a Parent’s Profile. To see who is linked to any individual User Profile, access the “Linked” screen in the “Profiles Admin”, then double-click on the Profile (on mobile devices click the Profile, then choose the “Select” button) whose links you would like to see. Alternatively, you can select a User Profile in the “List of Profiles” screen of “Profiles Admin”, then choose the “Linked” screen and it will automatically populate the linked profiles to the User you chose.



Profiles Administration

Self-Taught Users

Occasionally you will receive a question about how a person should create a profile if they are both of the age of majority and either self-taught or don’t have a teacher. It is always wise to remind them that they are responsible for understanding the syllabus. For such a person to create a profile, they should create a profile as an “Entrant”. In the process of creating their profile, they will enter their birthdate, where the system will learn that the participant is of the age of majority, and then will offer the Self-Taught checkbox beside the Teacher ID box.

If a person creates a profile before following this process, they will need to edit their profile to be an Entrant with a birthdate of at least the age of majority before the Edit Profile screen offers a Self-Taught option. Entrants who are not of the age of majority will need to link to a parent, and that parent should also identify themselves as the teacher if there is none.



Profiles Administration

Viewing a User’s Profile from Their Perspective (Login As)

On occasion, it may be necessary to log into a User’s Profile to be able to see whatever issues they are having from their perspective. In such a case, go to “Profiles Admin”, and in the “List of Profiles” screen double-click on the Profile you wish to log in as (or on mobile devices select the Profile, then choose the “Select” button), and choose the “Login As” button that appears in their profile. This will open up a new window with you logged in as if you are that User. From here, you will be able to see everything your User sees, and be able to support them better.



Profiles Administration

Keeping Notes

Keeping notes about your profiles is a good habit to get into. It will help you keep track of any support you have given or any other reason you might wish to save some information directly onto a Profile without necessarily notifying them. Notes help most if you have multiple Administrators with access to Profiles Admin, so that you can leave messages for others to see if they ever have to provide support as well. In the “List of Profiles” screen in “Profiles Admin”, double-click on the Profile you wish to keep notes on (or on mobile devices select the Profile, then choose the “Select” button). When the Profile opens up, the bottom will show you any notes saved thus far. To add or edit these notes, click on the “Edit Notes” button at the top of the profile. Make sure you save your work when you’re done.

Possible types of notes to keep include; keeping track of when a User has received support from an Administrator, when volunteers are available to work, when Adjudicators have been communicated with, Awards a User has received and when they received them, Provincial Recommendations from one year to the next, Adjudicator Recommendations that have been submitted to your provincial association and Scheduling requests from Users.



Profiles Administration

Other Data Cleanup Methods

On occasion potential Users create profiles and then never use them. Others use them once or for a period of time, and then never again, including past Entrants and Adjudicators. This is where data cleanup can help with the ease-of-use of your MusicFestivalSuite.com subscription.

Deactivating Profiles

Users can deactivate their profiles so that they no longer receive email communication, but so that they also continue to have access to any registration data or festival results from previous years. This is the most advisable data cleanup solution for anyone who has ever registered or been linked to someone who has registered. It is also advisable for Adjudicators who have worked previous years, but not again since. Instructions should be sent to these Users to tell them how to do so themselves. It can be appended to any Welcome message with the following message:

To stop receiving messages from our festival, log into your profile and choose “Deactivate”. Your profile does not get deleted, your history is never lost, and you can reactivate it at any time by logging back in. Deactivating your profile only prevents further email communications as per Canada’s Anti-Spam Law requirements. If you cannot remember your password, visit our MusicFestivalSuite.com portal, enter your email address and press the “Lookup” button.

Alternatively, if an Administrator receives a request from a user to stop receiving emails, Administrators can deactivate a profile on the user’s behalf. In such a case, find the profile in the “List of Profiles” view of “Profiles Admin”, and select it by double-clicking on it (or on a mobile device, clicking on the profile and choosing the “Select” button). Near the bottom of the profile, directly above the Notes section is a checkbox that, when checked, deactivates the profile.

Reactivating the profile is as simple as unchecking that box.

Deleting Profiles

For people who have never used their profiles, you can choose to delete their unused profile in the “Unused” view of “Profiles Admin”. Be careful when deleting data, as that data can never be recovered, and anything linked to that profile can cause the system to behave poorly. Ensure anything you choose to delete is not linked, either in this festival year or any other festival year.

Freezing Profiles

MusicFestivalSuite.com hopes you never have to use this option. Freezing Profiles is something an Administrator can do to prevent egregious data misuse on the part of the User. When an Administrator freezes a User Profile, the User can log into their profile, but they can't do anything else. The User will also be given a message that their profile has been frozen. By doing this, an Administrator can prevent the User from continuing to use data inappropriately, or causing any additional data problems more than they have already caused.

To freeze a profile or unfreeze a profile, find the profile in the "List of Profiles" view of "Profiles Admin", and select it by double-clicking on it (or on a mobile device, clicking on the profile and choosing the "Select" button). Near the bottom of the profile, directly above the Notes section is a checkbox that, when checked, freezes the profile. Unfreezing the profile is as simple as unchecking that box.

Ensure that when you have frozen a profile, you have communicated heavily with that User to maintain your festival's relationship with the public. Common reasons for freezing a profile (aside from breaking festival rules) include;

- Serial profile creation with inaccurate or illegitimately acquired/used contact information,
- Unusually linked profiles by Users who think they can solve their own errors but end up making things worse, or
- A court order indicating information about the profile must be divulged and maintained in its current status.



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