Time and Talents (v1.0) Member Software Tutorial

- [ ] **Overview**

Below is an overview of items covered in this tutorial. These instructions are written for a laptop or pc. Items may appear slightly different on a phone or tablet.

  - [ ] How to reach your timebank
  - [ ] Login Landing Page
  - [ ] How to complete your Bio and Edit Profile
  - [ ] How to add a Request/Offer
  - [ ] How to add an Announcement
  - [ ] How to Edit Contact Information
  - [ ] How to Search Members and Requests/Offers
  - [ ] Ebuddy
  - [ ] Groups
  - [ ] How to Log Hours
  - [ ] My Attributes
  - [ ] "ToDo" List

- [ ] **How To Reach Your Timebank**

The login link for your timebank is https://hourworld.org/bank/index.htm?hw=xxxx The xxxx, or last 4 numerical digits of that URL will be specific to your timebank as designated by hOurworld.org The login at https://hourworld.org will also direct you to your specific timebank, however you would not be able to see the login landing page for your timebank. The login landing page is the way your timebank can communicate with its members and the public. Additionally, there is an automatic newsletter that is sent out once a week, depending on the software settings set up by admin's.

  - [ ] [TOS -TERMS OF SERVICE] [PRIVACY] These are the terms members agree to governing their use of the hOurworld software and Privacy Policy. Checking the [x] boxes and [I Agree] constitutes agreement with these terms. They can be accessed at any time from any login page.
  - [ ] You may rescind your acceptance at any time by asking an Admin to remove your System Attribute "Member Accepts TOS" from your profile. That will prevent you from using the software platform.
  - [ ] Local Terms of Service, when provided to hOurworld.org can be an additional agreement which shows as a third checkmark when members first login to use the software.
  - [ ] [FORGOT PASSWORD] use this link if you need your password reset, or contact a coordinator by using the [CONTACT US!] link in the upper left hand corner of the login landing page.
  - [ ] [LOGIN] The software no longer asks you to "remember me" as most browsers now keep that information. Enter your username and password and decide if you want your computer's browser to remember this login.
    - [ ] If you have multiple accounts in the hOurworld platform to various timebanks and all [USERNAME] are identical, you will have access to all these accounts once you log in by using the [ACCOUNT] menu located on the top of most pages. In the case of multiple accounts, the account you access most often should have a unique password. It is permissible to have all other passwords the same.

- [ ] **Login Landing Page - My Newz Page**

  - [ ] Once logged in, clicking on your timebank logo will take you to your timebank's external website in another tab on your browser. If your timebank does not have an external website, clicking on the logo will take you to the Time and Talents Login Page.   Your software session stays open, but may time out after a period of time, and you may have to re-login.

- ☐ On a pc/laptop you will see three columns. The number of requests and offers shown per member may vary based on the default your timebank has set up. The software is responsive to screen size and orientation, so on a phone or tablet, columns will appear differently. Scroll down to see all the information if you are on a tablet or phone. The three columns are:
  - ☐ [ANNOUNCEMENTS] (left hand column) Used for Timebank Announcements. See your timebank's guidance for use of this area.
  - ☐ [Requests], (middle column) starting from the most recent are shown in this column.
  - ☐ [Offers], (right hand column) starting from the most recent are shown in this column.

☐ How to Complete your Bio

- ☐ Under the [Account] menu, [Statement] is a list of your exchanges and will be reviewed under the section How to Log Hours, below.
- ☐ [Edit Profile] You entered the profile information when filling out the join form. You can edit that information here.
  - ☐ [FIRST NAME] [LAST NAME] enter your real name.
  - ☐ [STREET] [ADDRESS 2] [CITY] [STATE] [ZIP] Enter this information which is private and not shared with any member at any time unless you add a separate address under [Edit Contact Info] below. This address field is used by the software to map exchanges and for coordinator use only.
- ☐ [Add profile image] Click on this link to add a photo to your profile. Images should be less than 10 mb in size and fit within 800 x 800 pixels before uploading.
  - ☐ The software accepts the following formats - .jpg, .gif, or .png
  - ☐ You must choose a file from your device, then click [Upload Image] Once uploaded you will be back at the [Edit Profile] page.
- ☐ [BIO] First sentence is "The best way to reach me is" and put either text/email/phone, etc., so that other members know how to best reach you. Some members rarely check/answer emails, others don't text and only want phone calls, etc..
    - ☐ BE WORDY in your profile and tell everyone what you LOVE to do, because when we do what we LOVE, it's not work! Bio's, as well as your name, city, zip code, service category, service and descriptions are searchable.
    - ☐ Make sure to click [SAVE CHANGES] in the upper right hand corner of your screen before moving on.
- ☐ [DEACTIVATE] Clicking this button will deactivate your account and allow you to email your admin so you can let them know why. Once deactivated, your account can only be reactivated by a Coordinator.
- ☐ [SEND WEEKLY UPDATES?] If the timebank has [Send Newsletter] set to on in their [Organization Info] a weekly update showing new announcements and the most recent offers and requests will be sent out to members, unless they opt out using this section of their profile, or click a link in the bottom of the Newsletter.
- ☐ [SHOW INTERTRADING] Set to yes, allows global trading offers and requests to be shown in that weekly update. If the member does not want to see them, it should be set to no. You can also opt out of Intertrading by following the link in the weekly Newsletter. Even if set to no, members may still make global offers and requests. This is a newsletter setting only.
- ☐ [Print your membership Card] and [Change Password] are both available from the [Edit Profile].

- [ ] **How to Add a Request/Offer**

The same steps are used for either a Request or an Offer.

- [ ] Click on the [HOME icon] If you already have requests/offers listed you can [Edit My Offers] or [Edit My Requests] from the dropdown box under [Services].
- [ ] Click on [+ADD REQUESTS]
    - [ ] [Check Selection] For adding one request, click one service. Clicking multiple categories/services creates multiple requests. Make sure each request is unique, do not list one request in multiple categories as this spams the system. Once your category/categories and services are checkmarked, click on
    - [ ] [ADD TO MY REQUESTS] Once you click [Add to my requests] you are taken to your Requests page where you may edit each entry. Be aware that your new requests all appear on the home page unless you [Save Without Broadcast] after editing. Edits may also be done from [Account, then [Edit My Offers] or [Edit My Requests]
- [ ] You will need to add a description to each service ad you created.
    - [ ] Click on the pencil to edit.
    - [ ] Use the [EXPIRES] drop down box to choose the expiration date of this request. This field will be pre populated based on the default in your timebank settings. Choose which date fits best.
    - [ ] There is a description field that reads: *"Tell us more about what kind of help you need."* Click inside that description box and explain:
        - [ ] WHAT you need/want,
        - [ ] WHERE you would like it to happen and
        - [ ] WHEN you need/want it done by. You can also add your best method of contact within the description if you choose.
    - [ ] You can click and drag on the lower right hand corner of this description box to enlarge it.
    - [ ] If a service ad does not have data in the description field, the software will delete that entry when the servers update every night. It will be removed from your "My Services" page and the homepage of the software.
    - [ ] Click [Publish] to leave your post on the home page. It will appear in the Newsletter for 30 days, unless you chose an earlier expiration date. Note: When a post expires, it is Suspended, not deleted. You may reactivate a post by setting a new expiration date. Members will get an email notification a week before a service expires, to log in and renew it if desired.
    - [ ] Click [Save Without Broadcast] to remove it from the home page and the upcoming Newsletters.
    - [ ] If you have an image to help people understand your request better, click the first icon underneath your description that reads [+ IMAGE]
        - [ ] The next page asks you to upload an image from your computer by using the [CHOOSE IMAGE]
        - [ ] Next, [CHOOSE FILE] which will take you to your computer's file directory where you can locate, then open/choose file (a command on your personal computer/device) that you wish to insert in your service ad. Accepted formats: .jpg, .gif, or .png
        - [ ] Once file is listed, you will then be taken back to the software and see the filename you chose listed to the right of the [CHOSE FILE] button
        - [ ] click on [UPLOAD IMAGE] and the photo will be inserted in your service listing
        - [ ] Click on [PUBLISH] Publishing a request/offer
        - [ ] will copy it to the home page and add it to the Newsletter for the next 30 days.

- ☐ Click [OK] You will land back on your “My Requests” page to make further changes, finish/edit another request you started, or add an offer by following the same steps listed above under [+Add Offers]
- ☐ [GO GLOBAL] If this request or offer is something that can be accomplished by another timebanker in the group of timebanks in the hOurworld system, click the [GO GLOBAL icon]. You will get a pop up box that says “This service is now available to the global timebank community!”

☐ How to Add an Announcement

This area may be used heavily by your timebank Administrators.

- ☐ Click on [+Post an Announcement]
- ☐ Enter the description
- ☐ Click on the down arrow to choose a date the Announcement [Expires]
- ☐ Click [Post]
- ☐ Admin’s currently using [Sort Order] in [Manage Announcements] will change where your announcement appears on the list.

☐ Edit Contact info

- ☐ Click on [ACCOUNT]
- ☐ Click on [EDIT CONTACT]
  - ☐ Each line of contact info has its own privacy settings. If you want members to see the information make sure it shows a red [NO]
  - ☐ When changing privacy settings, a popup box will appear showing hOurworld has saved the entry when you click [SAVE]. You must click [OK] to proceed
  - ☐ Click on [NO] to change privacy to [YES] if you wish that contact information to be private. When set to Private, other members can still contact you through the system, however, they will not know your email address unless you reply through your personal email client to them. Then, you will be giving them your email address.
  - ☐ [ADD NEW CONTACT INFORMATION] Bottom of the page, left hand side. Note the drop down list that contains many different methods of contact. Members can share their Facebook, LinkedIn, Twitter profiles and websites, etc. Make sure to click [ADD] when entering new info, or [SAVE] if editing existing info.
  - ☐ You may only edit and then save one item at a time.

☐ How to Search Members, Requests and Offers

- ☐ **Searching Member Database**
- ☐ At the [HOME] icon, click on the [MEMBERS] menu which opens a dropdown menu
  - ☐ Clicking [Members] will bring you to the member list. The default arrangement shows the newest members at the top of the list and can be arranged by using the drop down menu. The default is [MEMBER SINCE - NEWEST].
    - ☐ Click on the dropdown menu to see the various ways to rearrange the member database
      - ☐ Newest
      - ☐ Oldest
      - ☐ Member First Name, alphabetical (or reverse alphabetical)
      - ☐ Member Last Name, alphabetical (or reverse alphabetical)
      - ☐ Organizations, alphabetical (or reverse alphabetical)
      - ☐ Businesses alphabetical (or reverse alphabetical)
      - ☐ City, alphabetical (alphabetical (or reverse alphabetical)
    - ☐ Click on any member in the list to browse their profile, offers and requests. Contact information that is not listed as private will be visible to you

- ☐ Use the [SEARCH] box at the top of any page to search for any member by any part of their name.
  - ☐ Along with searching for members, the software search function is very dynamic. If you are looking for someone that might be interested in a similar topic as you, search by that/those term(s) in the search box
  - ☐ Example: type in one or more terms like ***dog*** or ***dog walking*** in the search box. You will see a listing of offers and requests having to do with your search term(s).   You may also see a box that shows how many members have the word ***dog*** listed in their profiles. Click on any result to see the corresponding member offers, requests, or bios for you to browse.
  - ☐ Results to your search may show any of the following. Click on any link to see the results described:
    - ☐ “x” number of offers in “x” number of categories
    - ☐ “x” number of requests in “x” number of categories
    - ☐ “x” number of matching Bember Bio’s
    - ☐ “x” Members by Name
    - ☐ “x” Announcements
    - ☐ “x” number of Help Items Found.
- ☐ After clicking on any result section, clicking on any member’s profile picture or name will take you to that member’s profile. The following items will be shown:
  - ☐ [Member Bio]
  - ☐ [Achievements] (How many exchanges have been completed, how many members are satisfied with those exchanges, endorsements from other members, groups the member is a part of, etc.)
  - ☐ [Contact] lists the various ways this member may be contacted.
  - ☐ Offers the member has listed
  - ☐ Requests the member has listed
  - ☐ Groups the member is a part of

- ☐ **Searching Requests and Offers**
- ☐ On any page click on the [Services] menu, then use the dropdown menu to navigate to either [Explore all Offers] or [Explore All Requests] You will see a list of Service Categories of Offers or Requests based on your choice. Navigate through and click on a Category to to see the individual Service Ads within that Category.
- ☐ From this service ad, you can look at the member's profile, respond to the individual member by clicking on the envelope icon or use the hours icon to record hours for that particular Service. You can use the [+ Endorse] icon to endorse (like) this member.

☐ EBuddy

An EBuddy is a computer literate member that can earn hours caring for another member who does not have access to a computer, or a member that is just technically impaired. Being an Ebuddy is beneficial to your timebank in that one member may use the software on behalf of another member. You can do everything as an EBuddy that you can do in your own account.

- ☐ An Admin must assign you as an EBuddy to another member’s account.
- ☐ Once assigned, you will see a drop down list named “Use Account As” [*name of the current account in use]* and may select any of the accounts you have been assigned to work with, as well as return to your own account.

- [ ] **Groups**

Groups are a dynamic way for members to self organize and connect with other members who may live in the same neighborhood, speak the same language or share the same interests. Groups can be used for projects or events and the groups can either be public or private. Any member can join or remove themselves from a public group. Only an Admin can add or remove members to/from a private group. If you have joined any groups you will see the number of messages you have next to the [Groups] icon under the [Members] menu.

  - [ ] **Viewing, Joining or Leaving Group(s)**
    - [ ] From any page, go to [Members] > [Groups]
    - [ ] Under the heading "My Groups, Projects and Events", you will see a list of the groups you are a member of.
    - [ ] From the [Groups] page you can view, add or remove your group affiliations.
      - [ ] Click [Add] to add yourself to a group.
      - [ ] Click the [Trash Can] Icon to remove yourself from a group
    - [ ] For all public groups, whether you are a member or not, you can see who is in any group by holding the mouse over or clicking on the number that shows how many members have joined that group.
    - [ ] Once you join a group you can send messages to all the group members.
  - [ ] **Making a Public Group**
  - [ ] You may create a group if you don't see a group listed that you'd like to be a part of.
  - [ ] From the [Groups] page scroll down to the section "Create a New Group, Project or Event."
    - [ ] Enter the Group Name
    - [ ] Enter a description
    - [ ] Click [Add] You'll be added to the group and a message will be posted to the Announcements section of the Homepage inviting other members to join.
  - [ ] **Making a Private Group**
    - [ ] Contact your Admin

- [ ] **Logging Hours** Logging hours may be done from any request, offer, announcement or manually from the [Services] > [Record Hours] menu. The steps below detail logging hours manually for a one to one service exchange. You can also watch a short video on the hOurworld youtube channel for this topic. There is a link to the video next to the title on the page.

  - [ ] **From a Service Ad or Announcement**
    - [ ] You may record your hours from anywhere you see the post by clicking on the [Clock/Hours] icon. The software will fill in everything it knows about you, the other member and the service. If you don't see the post anywhere (no longer on the home page…) then:
    - [ ] Use the [Search] field and type in the member's first name you exchanged with. Depending on how many people share that name, your results may vary.
    - [ ] Click on the results [x member(s) by name] and choose your member.
    - [ ] Click on the members name once more which brings you to their full profile. (You could record your hours from here but you would need to identify the Category and Service you provided or received from this member.)
    - [ ] Scroll down past the [Member Bio], [Achievements], and [Contact] to either [Offers] or [Requests]
    - [ ] Scroll down to the request/offer that you provided or received.
      - [ ] Use the [Hours] icon to log the time. The software populates the form with information from the service ad. You'll need to complete the

- ☐ [Transaction Date]
- ☐ [My Hours]
- ☐ [Transaction Comment] Only the two of you will see this comment

- ☐ Click [Record Transaction]
- ☐ Confirm transaction was recorded properly in your [Statement]

- ☐ **Manual One-to-one exchange**
  - ☐ Click the [Services] menu from any page, then
  - ☐ Click [Report Hours] On this page you will see a note that reads: Report My Hours - Hint: Work Top Down. If you click the video icon, you will be taken to a short youtube video with instructions on all the ways to record 1 to 1 hours.
  - ☐ Fill out the remaining lines, in order:
    - "[Did you provide or receive] the service?" Choose by using the drop down menu
    - ☐ "Select the exchange date" Clicking in the empty space brings up a calendar. Click on the appropriate date and it will populate this field.
    - ☐ "To/From How many members" For this example, enter 1
    - ☐ "Enter the members name" Start typing the members name and then select the member from the list that appears by clicking on that members name. Some browsers (Safari) may try to fill this information in for you, but you MUST click on the appropriate name in the underlying list in order for this to function properly.
    - ☐ Enter the number of Hours in the format x.xx if needed: 1, 1.5, 1.25 are all good examples.
    - ☐ Choose the Category by clicking [Select Category], then clicking on the appropriate Category from the list.
    - ☐ Once you choose the Category, a list of services within that category appears. Choose which service you are logging hours for.
    - ☐ "Leave a comment" is used for thanking the party you did the exchange with, or making a specific note about the exchange. Only the parties to the exchange will see this note.
      - ☐ The other party to the exchange will get an email recounting the details you've entered, including your comment, if any. They may [Endorse] you from that email, or [Initiate a Dispute]
    - ☐ Click [Record Hours] You are then taken to your [Statement] which can always be accessed through the [Account] menu. Verify you have entered the hours properly. If you have made a gross error (as in choosing the wrong participant, incorrect category, wrong amount of hours, etc., you may [Delete] the entry and try again.. Doing so removes the entry from both member accounts. If the exchange debited your account instead of crediting you then you selected [I received the Service] instead of [I provided the Service], you may delete the entry and start over or a Coordinator can correct that mistake for you. You can [Contact Your Coordinator] at the bottom of the page which will bring up an email form. You can explain what the Coordinator needs to fix.
    - ☐ You can make a [Printer Friendly Statement] or [Email My Statement] by typing in the email address you would like the statement delivered to. It will already contain the Contact email of the account you are using if there is one.

- ☐ **Manual One-to-Many with no service ad**

  If you have multiple members that responded to a request of yours (for example, 5 members showed up to work in your garden for an hour each) you can record those hours all at once. These instructions show you how to do that without a service ad

- ☐ From any page, click the [Services] menu, then [Report Hours]
- ☐ Start from the top, and work your way down:
  - ☐ In this example, choose [I received this Service]
  - ☐ Select the Exchange Date
  - ☐ For this example, in the From/To how many members you would choose 5 (five)
  - ☐ Look up the member's name - Start typing the members name and then select the member from the list by clicking on the members name. Some browsers (Safari) try to fill this information in for you, but you MUST click on the appropriate name in the underlying list in order for this to function properly.
  - ☐ Enter the number of hours each person worked. (This example would be 1)
  - ☐ Select the [Category]
  - ☐ Select the [Service]
  - ☐ Leave a comment that all the providers will be able to see
  - ☐ Click [Record Hours]

  Review your statement to see the transactions were entered as you intended. Each recipient will get an email recounting the details of the transaction. They may [Endorse] you or [Initiate a Dispute] from that email.

☐ **Global Inter-Trading Hours**

The ONLY way to log Global or Inter Trading hours is through the service ad in the [Services] > [Inter-Trade] area. You may also watch a short video on this subject. A link to the video is on the Inter-Trade page next to the title.

- ☐ From any page click the [Services] menu then select [Inter-Trade]
  - ☐ From the drop down menu select [Explore Global Offers] or [Explore Global Requests] depending on what service you have completed with a member from another timebank
  - ☐ Choose the Category the Service Ad was listed under (or use Search)
  - ☐ Find the individual Service Ad you responded to
  - ☐ Click on the [Hours] icon to log the hours and follow the previous instructions

☐ My Attributes

This section may be used by the timebank for reporting purposes. Attributes are private and cannot be seen by any other members. Only software administrators and the members themselves can view or edit this information.

☐ To Do List

A ToDo list may appear under the [Account] menu, the software checks for the following items, and provides you with a link to perform that operation:

- ☐ If your annual donation is due (may not apply to your timebank)
- ☐ If you have no Bio
- ☐ If your address isn't resolving in Google maps
- ☐ If you have no Offers
- ☐ If you have no Requests
- ☐ If Offers or Requests are missing a Description
- ☐ If you have no Contact information
- ☐ If you have no exchanges, or exchanged more than a month ago
- ☐ If your password is still abc123
- ☐ If you have no Profile Image
- ☐ If you have an exchange marked as Not Satisfied