

Admin Quick Start Guide for hOurworld: powered by Time and Talents!

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Admin Home

To Search the Knowledge Base

Click and type in one or more search terms. >

Click [Search].

Notes: The knowledge base is comprised of all closed support tickets from both Admins and Members. It also includes a more verbose form of the help system.

To Contact hOurworld Technical Support

Click [Contact Tech Support] on the menu. >

Enter your question or comment. >

Click [Send].

Notes: It is worth searching the knowledge base since it is comprised of all closed support tickets from both Admins and Members. It also includes a more verbose form of the help system.

To Edit or Delete a Member Message

Click [Manage Messages] at Admin Home. >

Locate the Message you would like to edit or delete. >

To edit make changes and click [Save]. >

To delete click [Delete].

To Search Member Offers

Method One:

Type one or more search terms into the search box on the menu bar. >

Click [Search]. >

Click the '(#) Providers in (x) Categories' link.

Method Two:

Click [Search Offers] at Admin Home. >

Click on a Service Category in the list. >

Click on a Service in the list.

Method Three:

Click [Search Offers] at Admin Home. >

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

Note: You may email or print this directory.

To View, Print or Email the Member Offers Directory

Click [Search Offers] at Admin Home. >

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

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Click [Email Spreadsheet] to send yourself the directory.
or click [Print Service Directory] to print it.

To 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 (x) Categories' link.

Method Two:

Click [Search Requests] at Admin Home. >
Click on a Service Category in the list. >
Click on a Service in the list. Method Three:
Click [Search Requests] at Admin Home. >
Click [Browse Service Requests] to see the entire service directory.

To View, Print or Email the Member Requests Directory

Click [Search Requests] at Admin Home. >
Click [Browse Service Requests] to see the entire service directory. >
Click [Email Spreadsheet] to send yourself the directory.
or click [Print Service Directory] to print it.

To Manage the Attributes Pick List

Click [Manage Attributes] at Admin Home. >
To add a new category enter the name in the 'Add New Category' and click [Add].
To edit the name of an Attribute Category enter any changes and click [Save].
To print out the entire attributes list click [Print Attributes Pick List].

To view the attributes in a category click [View].
To add a new attribute enter the name in the 'Add New Attribute' box and click [Add].
To edit the name of an attribute enter any changes and click [Save].
To see the active or inactive members that possess or prefer an attribute, click on the numbers to the right.
To delete an attribute click [Delete]. If it is associated with member's profiles the system will guide you through a process to reassign the old attribute to a new one, before the deleting the old one.
Notes: An attribute must exist on this list before it can be associated with a member's account.
Setting an attribute to private [Yes] makes it so that the attribute may only be added to a member's profile by an admin.
The member can see they have the attribute but not add or remove it from their profile.
[Reporting] allows you to filter results by one or more attributes in a category.

To Manage the Services Pick List

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Click [Manage Services] at Admin Home. >

To add a new category enter the name in the 'Add New Category' and click [Add].

To edit the name of an Service Category enter any changes and click [Save].

To print out the entire services list click [Print Service Pick List].

To view the services in a category click [View].

To add a new service enter the name in the 'Add New Service' box and click [Add].

To edit the name of an service enter any changes and click [Save].

To see the active or inactive members that offer, request or exchanged a service, click on the numbers to the right.

To delete a service click [Delete]. If it is associated with member's profiles the system will guide you through a process to reassign the old service to a new one, before the deleting the old one.

Notes: A service must exist on this list before it can be associated with a member's account.

Setting a service to private [Yes] makes it so that the service may only be added to a member's profile by an admin.

The member can see they have the service but not add or remove it from their profile.

[Reporting] allows you to filter results by one or more services in a category.

To Manage the Groups Pick List

Click [Manage Groups] at Admin Home. >

To print out the entire services list click [Print Service Pick List].

To add a new group enter the name in the 'Add New group' box and click [Add].

To edit the name of an group enter any changes and click [Save].

To see the active or inactive members affiliated with a group, click on the numbers to the right.

To delete a group click [Delete]. If it is associated with member's profiles the system will guide you through a process to reassign the old group to a new one, before the deleting the old one.

Notes: A group must exist on this list before it can be associated with a member's account.

Setting a group to private [Yes] makes it so that group may only be added to a member's profile by an admin.

The member can see they are in the group but not add or remove themselves from it.

In the 'My News' area a member may message all of the members of any group they are affiliated with.

[Reporting] allows you to filter results by group.

To View or Clear the Member Login Record

Click [View Logins] to see who has been logging in and when. >

Failed logins are reported as well.

To clear the login record click [Clear Login Record].

Member Profiles

To Manage a Member's Account

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Click [Manage Members] at Admin Home. >

Type in the member's ID, or part of their name or email. >

Click [Find Member]. >

Select the member from the list that appears. >

Notes: Entries in the Administrative Notes text box are displayed to admins only.

To Edit A Member Profile (Name, Address, Bio, etc.)

Click [Profile] on the menu. >

Make any changes as desired. >

Click [Save Changes].

Notes: If you add an 'Address' type contact in the [Contact] area THIS address will be used to create a Google Maps link.

Username is NOT used for email purposes. The 'Email1' type contact in the [Contact] area IS.

To Email a Member

Click [Profile] on the menu. >

Click [Email Member]. >

Enter 'From:', 'Email:', 'Subject:' and 'Message:'. >

Type in the security code. >

Click [Send].

To Change a Member's Password

Click [Profile] on the menu. >

Click [Change Password]. >

Enter 'New Password' in the two boxes provided. >

Click [Change Password].

To Make a Member Inactive

Click [Profile] on the menu. >

Click the [Yes] on Active Member? [Yes] (It will change to [No]).

Notes: To make a member inactive until a certain date:

Enter the Inactive Until date [mm/dd/yyyy]. >

Click the [Yes] on Inactive Member [Yes] (It will change to [No]).

To Queue a Member For Paper Only Communications

Click [Profile] on the menu. >

Click the [Yes] on Send Communications by Email (It will change to [No]).

Notes: In [Reporting] you may set the 'Paper' criteria to All, Paper Only or Paperless.

Selecting Paper Only will pull all members where Send Communications by Email is set to [No].

This is especially useful for the Mailing Labels report.

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To Add New Member Contact Information

Click [Contact] on the menu. >

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'. >

Click [Add]. Notes: Set Type = Address to add a Google Map link.

(It will use the address in the [Profile] area, not what you enter here.)

Set Type = Website to create a link to a member's website (if they have one).

Set Type = Facebook to enter a link to a member's Facebook account.

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

To Edit Existing Member Contact Information

Click [Contact] on the menu. >

Edit the contact information to be changed in the 'Contact' box. >

Click [Save] > Click [No] or [Yes] to set the information to be 'Private' or not. >

Notes: Administrators have access to private contact information. Members do not.

If the Email1 email address is set to private members will see a 'Message Me' link instead of the address and may still be contacted. If they then reply from their own email client, the receiver will then have their address.

To Add/Remove Multiple Service Offers

Click [Services] on the menu. >

Click [Add/Remove Offers] >

To add new services scroll down through the list and click the [] checkbox next to any service the member would like to offer.

To remove a service from those offered uncheck the [√] checkbox by clicking on it. > Click

[Update Services] > To finish add service descriptions to any new services one at a time. >

Click [Save] to save the changes.

Service descriptions get searched when members are looking for offers and requests. Notes:

Members may post short term or time sensitive requests and offers in the My News and Messaging area on the member side.

To Add/Remove Multiple Service Requests

Click [Services] on the menu. >

Click [Add/Remove Requests] >

To add new services scroll down through the list and click the [] checkbox next to any service the member would like to request.

To remove a service from those requested uncheck the [√] checkbox by clicking on it. > Click

[Update Services] > To finish add service descriptions to any new services one at a time. >

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Click [Save] to save the changes.

Notes: Service descriptions get searched when members are looking for offers and requests.

Notes: Members may post short term or time sensitive requests and offers in the My News and Messaging area on the member side.

If the service doesn't exist use [Manage Services] from the Admin Home to create it.

Notice links to members requesting a service being offered or vice-versa will appear in their listing in the [Services] area!

Note that service descriptions are included in searches. (It may take a few hours for the system to see new entries.)

Members may associate an image with a service they offer from the member side.

To Add or Edit a Service Description

Click [Services] on the menu. >

Locate the service to edit. >

Enter and edit the service description. >

Click [Save].

Note: If a member is offering AND requesting the same service write a description to accommodate both since they will share the same description. (Or select slightly different listings for the offer and request.)

To Manage a Member's Group Affiliations

Click [Groups] on the menu. >

Click [Remove] to leave a group. >

Click [Add] next to any group you'd like to associate with this member's profile. Notes: To view the other members in a group mouse over or click on the number next to the group in the 'See Members' column. In the 'My News' area members may post a message (and email) to all of the members of a group they are in.

To View the Other Members in a Group a Member is Affiliated With

Click [Groups] on the menu. >

Mouse over or click on the number next to the group in the 'See Members' column. Notes: In the 'My News' area members may post a message (and email) to all of the members of a group they are in.

Use {File}-{Print} in your browser menu to print this list of group members.

To Add/Remove Attributes in a Member Profile.

Click [Attributes] on the menu. >

Click [Add/Remove Attributes] >

To add new attributes scroll down through the list and click the [] checkbox next to any entry.

To remove an attribute from the profile uncheck the [✓] checkbox by clicking on it. >

Click [Update Attributes] Notes: ONLY Staff can see these Attributes. They are not published anywhere.

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They do NOT appear in any profile or report that other members may see.
They are used to anonymously report on the time bank's activities, in some cases to justify funding.

To Add a Profile Image to a Member's 'my page'.

Click [Images] on the menu. >
Select Add Profile Image: Best Ratio 3 wide : 4 tall. >
Click Browse... to choose a jpg, png or gif image file from your computer. >
Click [Upload Image] >
Click [See the Member's Home Page.] to view the result.

To Add a Banner Image to a Member's 'my page'

Click [Images] on the menu. >
Select Add Banner Image: Best Ratio 4 wide : 1 tall. >
Click Browse... to choose a jpg, png or gif image file from your computer. >
Click [Upload Image] >
Click [See the Member's Home Page.] to view the result.

Member Hours

To Report Hours Exchanged from Scratch

Click [Report Hours] on the menu. >
Select if the member Provided or Received. >
Enter the number of hours. >
Enter the exchange date. >
Enter the number of members Provided To or Received From. >
Click [Continue]. Type in any part of the member's name(s). >
Click [Find Member(s)]. >
Select the member from the list that appears. >
Click [Continue]. Type in any part of the name of the service or category. >
Click [Find Category]. >
Select the service category from the list that appears. >
Click [Continue]. Select the service from the list that appears. >
Click [Record Transaction!]. Notes: Click [Statement] on the menu to verify the transaction if you like.
You may indicate a member's willingness to be a reference for any member that has provided to them.
(Notice a link to members willing to provide a reference will appear in their service listing and on their 'my page'!)

An admin may delete any transaction, effectively issuing a refund.
An admin may indicate member satisfaction with any transaction.

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To Report Hours Exchanged Using an Existing [Statement] Entry

Click [Statement] on the menu. >

Click the [+] next to a transaction where the provider, receiver and service are the same as what you want to record. >

Enter the exchange date. >

Enter the exchange hours. >

Click [Record Transaction!]. >

You'll be taken to the [Statement] area to verify the new entry. Notes: An admin may indicate a member's willingness to be a reference for any member that has provided to them.

(Notice a link to members willing to provide a reference will appear in their service listing and on their 'my page!')

An admin may delete any transaction, effectively issuing a refund.

An admin may indicate member satisfaction with any transaction.

To View a Member Statement

Click [Statement] on the menu. Notes: An admin may indicate a member's willingness to be a reference for any member that has provided to them.

(Notice a link to members willing to provide a reference will appear in their service listing and on their 'my page!')

An admin may delete any transaction, effectively issuing a refund.

An admin may indicate member satisfaction with any transaction.

To Print a Member Statement

Click [Statement] on the menu. >

Click [Print Statement] >

Click [Print Statement] again to send a copy of the statement to your printer.

To Email a Member Statement

Click [Statement] on the menu. >

Enter a valid email address into the 'Email Statement TO:' box.

(It already contains the member's Email1 address if they have one.) >

Click [Send]

To Edit a Member Exchange

Click [Statement] on the menu. >

Click [Edit] on the line where the transaction appears, then: > Edit the Trans Date box and click [Save]. > Edit the Time Credits box and click [Save]. > Click [Swap Pro/Rcv] to swap Provider and Receiver. (This is rare.) > To change the receiver click [Edit Receiver]. >

Type any part of the receiver's name. >

Click [Find Member]. >

Select the member from the list. >

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Click [Save]. To edit the service click [Edit Service]. >

Type part of the name of the service or category and click [Find Category]. >

Select the category and click [Continue]. >

Select the service and click [Save]. >

To Absorb an Inactive Member's Hours into the Time Bank Using [Set Zero Balance]

Click [Statement] on the menu. >

Click [Set Zero Balance]. Notes: If the member has a positive balance their hours will be moved into the 'Exchange as Member' account.

If the member has a negative balance their hours will be moved out of the 'Exchange as Member' account.

To Indicate a Member's Satisfaction With an Exchange

Click [Statement] on the menu. >

In the 'Satisfied' column, click [No] to change to [Yes] or Click [Yes] to change to [No] on the line where the transaction appears.

To Indicate a Member's Willingness to Provide a Member Reference

Click [Statement] on the menu. >

In the 'Reference' column, click [No] to change to [Yes] or Click [Yes] to change to [No] on the line where the transaction appears.

All About Member Satisfaction and References

When the receiver of a service is reporting hours they may indicate their satisfaction with the exchange and their willingness to provide a reference for the provider. These are recorded separately so that members may be satisfied AND maintain their privacy (i.e. a receiver of health care). The providing member may delete a transaction if the receiving member is not satisfied, essentially refunding the hours earned. When the provider is reporting hours they may indicate if the receiving member is satisfied, and if the receiving member is willing to provide them a reference. In either case the member not recording the exchange is sent an email, and a message viewable in their My News area announcing the exchange has been recorded, and the satisfaction and reference choices made by the recording member. If the member is not happy with these settings they may change them in their 'my statement' area. Just click on the [Yes] to change it to [No] for Satisfied or Reference or vice versa. In the providing member's 'my page' area (which other members can see), a heart icon will appear with the number of references the member has for that service. Holding the mouse over the heart number pops up a list of those willing to provide a reference. Clicking on the heart number brings you to page where you may email each

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reference provider (one at a time). In the provider's 'my page' area (which other members can see) the header will contain information about the number of exchanges in which the receiver was satisfied, in addition to Last Login, Last Transaction, Member Since, etc. All of this information can help receivers decide if this is a member they want to exchange with.

Applicants

To Manage New Applicants to the Exchange

Click [View Applicants] on the menu. (You'll see 'No Applicants to Display' if there aren't any.)
> To set up an applicant's member profile click [Add As Member].

Notes: An attribute called 'Applicant Pool' is set on the profile so the new member may be called up later from [Reporting] > 'Applicant Pool'. We'll use this report to schedule them for an orientation and track receiving their references, release form, attributes and so on.

When you click [Add As Member] an email is sent to the new member.
This email may be edited in the [System Notices] area in the Join section.
You may want to ask the new applicant to contact you to schedule an orientation.

If a paper application is received enter the information into the online join form. >
Click [Send Application]. >
Follow the steps above.
It can be found at https://hourworld.org/bank/Join.php?hw=your_exchange_id
Note: (*your_exchange_id* may be found in the [Organization Info] area.).

To delete an entry click on the checkbox [☒] so it's checked >
Click [Delete].

To Schedule New Members for Orientation

Click [Reporting]. >
Select [Applicant Pool]
>
Hold down your keyboard [Ctrl] key and click on the member's name to open their Profile page a new tab. >
Click on the new tab see the member's profile. >
Click [Email Member] to email or [Contacts] to phone the member to schedule their orientation.
>
Close the browser tab. >
Record the results of your action back on the 'Applicant Pool' tab. (Orient Scheduled, Orient Date) >
Click [Save]. >
Repeat this process for the other members on the list. >

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Notes: Notice that Reference's contact info has been copied into the 'Admin Comments' area. If a reference email address was included in the member's online application the reference has been emailed a reference request.

That letter may be edited in the [System Notices] area in the Join section.

If no email is included, the reference can be called or the new member applicant can bring in a paper reference to orientation. (The join form affords the means to print paper reference forms.) When a reference is returned through email make note of it in the 'Applicant Pool' report or the member profile Admin Notes area by adding your initials, date, and reference received from.

New Member Orientation Outline

Orientation Outline

1. Introduce Ourselves:
 - a. Give our own story
 - b. How did you hear about us? What made you want to get involved?
 - c. What services do you want to Provide? Receive?
2. Our Service Exchange History and Overview
 - a. We are an organization of over [#] people, businesses, and organizations that exchange goods and services with others in the network based on the currency of time.
 - b. We have been around since [year]
 - c. The time banking movement was started by a group of women in Saint Louis who formed Grace Hill Settlement. They coined the original four core values. Dr. Edgar Cahn has been a spokesperson for time banking. He is the author of two helpful books: The Time Dollar Movement and No More Throwaway People.
 - d. Edgar was a prominent member of the community when he suddenly became ill and found there was little he could do for himself, let alone for others. He hated the feeling of helplessness and recognized that this is a way of life for many who have a disability, are elderly, or are socio-economically disadvantaged. He realized that even though he was ill, he could still give something, even if he would just listen to a child who was learning how to read.
 - e. Doing something that another person needs or wants, or receiving something you need from another, gives each person respect and value.
 - f. We are much more than just about exchanging services. Our activities are about building community and enhancing each other's lives.
3. Our Core Values: We mean many things to many people and our core values are what bind us together and makes us a community. (((Tell Stories to illustrate.)))
 - a. Assets: We all have talents and strengths. We are all assets. Every human being has something of value to contribute
 - b. Equality: At the heart of every exchange of time is equality. All people are valued equally at [our service exchange]. One hour of service equals one time credit, regardless of the service. One hour of legal advice equals one hour of weatherization equals one hour of transportation or help, etc.

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- c. Respect: Everyone matters. We must respect where people are in the moment, not where we hope they will be at some future point.
- d. Redefining Work: Work is beyond price. We feel that work must be redefined to include all of the activities it takes to sustain families, neighborhoods and communities, to sustain our democracy and to advance social justice. This kind of work needs to be honored and rewarded.
- e. Reciprocity: Helping works better as a two way street. The question, "How can I help you?" needs to be changed to, "How can we help each other build the world we both want to live in?" At [our service exchange], you earn what you receive. You can feel good about what you are exchanging because you are not always taking, or always giving.

4. Member Rights, Responsibilities, and Courtesy Rules

- a. Rights: As a member of [our exchange], you have certain rights:
 - i. Right to be valued for service to the network and community
 - ii. Right to personal development and lifelong learning
 - iii. Right to confidentiality
 - iv. Right not to be discriminated against on the basis of age, gender, race, ethnicity, religion, sexual orientation, or disability
- b. Responsibilities: *** Stress the importance of calling back, and keeping your service offers and requests up to date***
 - i. Courtesy Rules
 - 1. 24 Hour Cancellation Notice
 - 2. 48 Hour call back, whether providing the service or declining the request
 - ii. Minimum of [6] hours of exchange per year. It is important to enter your hours as you earn them. Members who do not exchange will be made inactive until they are ready to participate in the program again. Reactivating is as simple as calling the office to let us know.
 - iii. Maintain an accurate account. Check your balance periodically and make sure all your exchanges have been recorded.
 - 1. NOTE: Exchanges are generally recorded by the member who provided the service (in other words, the member who is earning hours, though it is very easy for the receiving member to do so.)
 - iv. Maintain current contact information. Inform [our administrator] about changes in your status. Updated profiles are imperative for effectively facilitating exchanges; we don't want to refer anyone to an inactive member!
 - v. Annual Donation: We may ask for a donation of either [2] hours and [\$25] or [4] hours. THANK YOU. Members will receive a prompt in their account on their anniversary join date. It takes both social capital, and the cash economy, to operate [our service exchange]. All help from members is greatly appreciated!
 - vi. Remember, Members can be dismissed for unacceptable conduct. Any serious concerns should be brought to the attention of [our administrator].

5. Secrets to Successful Exchanging (((Tell Stories to illustrate)))

- a. Be social and build relationships. People are more likely to exchange with members they have met. Matches are often made at our events.
- b. Recruit everyone you know. Consider how you regularly spend money and envision a different kind of Exchange. Tell your friends and see how you can integrate [our service exchange] into your life.

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- c. Get to know the Time and Talents software. It's a great tool!
 - d. Be a familiar face around our office. Feel free to drop in and say hello. The more we know about you, the more we can sing your praises to other members.
 - e. Communicate clearly within the Exchange. Be sure to communicate your needs, wants, and preferences.
 - i. Sometimes, members want their travel time to be included in the service exchange. This is up to you to negotiate, and it's best to do so BEFORE you provide the service.
 - ii. Sometimes, materials will be needed for an exchange such as cooking or yard work. Discuss who will provide those materials.
 - iii. Members sometimes choose to exchange items for Hours. In this case, it is up to the members to negotiate upon the number of hours an item is worth. If it is a handmade item, generally it is the time it took to make the item.
 - iv. Remember, exchanges are not guaranteed. We are a network of neighbors helping neighbors. It is up to the members to judge who they would like to exchange with and to ask questions about licensing, liability and insurance, if need be. It is perfectly ok to ask for this information BEFORE the exchange happens.
 - f. Only offer services that you actually want to provide. People will call and request services. [our service exchange] provides a great way to spend more time doing what you love. Use the hours you earn to get those nagging tasks out of the way to free up your time.
6. Events and Opportunities: (Very Important!)
- a. Highlight a few programs: Access to Arts (i.e. from Hour Exchange Portland in Portland, Maine: Portland Ovations, SPACE, and Mayo Street Arts), Time Gallery, Weatherization, Microenterprise Development, Refugee and Immigration Services opportunities (English Conversation Circle), Access to Health Care (Turn the Tide Maine and True North), etc.
 - b. Monthly Potluck! 3rd Wednesday of the month 5-7. Great way to meet members and make plans for exchanges.
 - c. Highlight other upcoming events and fundraisers
 - d. Member Leadership: [our exchange] is always looking for members to get involved. Help with our projects, or start your own! Take a member leadership sheet if interested (Another great way to earn hours and meet members)
 - e. Highlight any other projects currently being developed by [our exchange] and ask if any new members are interested.
 - f. Member Perks: (another Hour Exchange Portland example: Discount at Silly's local restaurant, discounted BJ's membership.
7. Walk them through Time and Talents features on the website
- a. Time and Talents can be used to: send messages, report hours, see your statement, change the services you offer and the services you want to receive, update contact information, view and post Eblast entries, and more!
 - b. Show new members:
 - i. How to log on
 - ii. How to add services (both offer and request)
 - iii. How to search for providers and receivers
 - iv. How to report hours. Encourage them to record their first exchange, 1 hour for attending this orientation

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- v. How to change info (drive home the importance of keeping profile and service information current)
- vi. How to access and post and reply to messages.
- c. If you need any additional help navigating Time and Talents, please contact [our administrator], or use the 'Help' links on each page in Time and Talents.

Release Form / TOS

By logging in I certify that I have read this document carefully, that I understand and accept its terms, that I recognize that my acceptance constitutes a waiver of legal rights, and that it is enforceable to the full extent allowed by law.

Agreement to Participate at My Own Risk and Hold hOurworld / your_exchange_name_here Harmless

As a member of hOurworld / your_exchange_name_here, I understand that hOurworld / your_exchange_name_here does not guarantee or warrant the fitness, safety or quality of work for any of its members.

I agree to undertake and request neighborly acts of kindness, caring and assistance with other members of hOurworld / your_exchange_name_here;

I assume the risk of injury, harm or damage in connection with my providing or receiving services to/from other hOurworld / your_exchange_name_here members;

I agree to hold hOurworld / your_exchange_name_here harmless from any and all liability, actions, claims and damages of any kind, including those caused by or arising from negligence, for injury to person or property;

As a member of hOurworld / your_exchange_name_here, I will try to the best of my ability to:

- Respond to other member's communications with me within 48 hours;
- Be polite and helpful, and clear about the amount of services I am offering or requesting;
- Perform quality services to the best of my ability;
- Perform services in a safe and careful manner;
- Insure that all my contact with other members will reflect our core values of respect, reciprocity and equality;

As a member of hOurworld / your_exchange_name_here, I consent to the following actions:

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- that any references that I provide may be contacted;
- that hOurworld / your_exchange_name_here may release relevant information concerning my ability and fitness to work as an hOurworld / your_exchange_name_here member to other members seeking to utilize my services;

As a member of hOurworld / your_exchange_name_here, I understand that I may negotiate time credit or hour amounts for a service or goods. I understand that I may limit the amount of any services I provide. I may decline to be involved in an exchange at any time.

Reporting

To Report on Members or their Exchanges

Click [Reporting]. >

[Select Report] >

Set criteria if any using the drop down and text boxes to narrow your search. >

Click [Update]. >

Set additional criteria (if any) using the drop down and text boxes to narrow your search still further. >

Click [Update]. >

Click [Print Preview]. > To email this report enter a valid address in the Email Report To text box and click [Send]. If this is a 'Contact List' report or 'Transactions by Provider' it may be mapped. Click [Map Report]. >

Click [Show the Map]!

Which Report Do I Select?

Email List: The Email List report generates a list of email addresses.

You may email the report results to anyone using the [Email Spreadsheet] button.

Excel or any other database program will routinely open comma delimited (*.csv) files. You may also click the [Email These Members] button and fill out and send an email to each one right from the reporting screen.

Notice the notation at the top of this sample report outlines the criteria that were set for it. This info is included if the report is emailed anywhere, or printed.

(This is true for all reports.)

Mailing Labels: Need mailing labels for your paper only members?

Want to send out a brochure to each of your inactive individual members over 40?

Email this report to your self and point to it with Word or any word processor that will handle Labels and Envelopes (mail merge). The file contains 'Name', 'Address', and 'City, State Zip'

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Contact List: The Contact List provides Member ID (linked back to that member's profile), first name, last name, member since, last exchange, hours balance, member type, phone and/or email if the member has them. It could be useful for checking up on members that haven't had any activity in awhile, or that have high or low balances.

If they have an email address it will appear as a link to the administrative email form. So you could send an email to a member, then [Go Back] to the report.

This is one of two reports that can be mapped by clicking the [Map Report] button, then click [Show the Map] From the map you can click on a marker, and there is a link there, back to that member's profile. Mapping can be useful for community neighborhood building. We've altered the image to hide member info.

Services Offered by Service: Services Offered by Service produces a Service Directory sorted by Service Category: Service. You may want to limit the results to active members. You might want to limit the output by a single category like 'Health Services' or even a single service like 'Health Services: Massage'. Any report may be emailed as a comma delimited *.csv file.

Services Offered by Member: This returns a Service Directory sorted by member. You may want to limit the results to active members. You might want to limit the output by a single category like 'Health Services' or even a single service like 'Health Services: Massage'. Any report may be emailed as a comma delimited *.csv file.

Services Offered by Count: Services offered by Count provides a list of services arranged by the number of members offering.

Transaction Count Between Members: Transaction Count Between Members provides a list of members arranged by the number of transactions between members in descending order. A glimpse at who is time banking with whom.

Transactions by Receiver: Transactions By Receiver results are sorted on the receivers of services. Link backs and email links are set up the same. When reporting on transactions it would be wise to include inactive members, since they may have been active during the transaction period you are reporting on, and you'd probably like to report all of the activity that happened. The images of these reports are shortened.

Transactions by Provider: The Transactions By Provider report is the meat and potatoes of transaction reporting. This is where you can report on who did what for whom and when, a hundred different ways. Provider IDs and Receiver IDs link back to member profiles. Member email addresses link to the administrative email form.

This is one of two reports that can be mapped by clicking the [Map Report] button, then click [Show the Map]. From the map you can click on a marker, and there is a link there, back to that member's profile. The provider and receiver in each transaction are connected by a thin line.

Transactions by Service: Transactions By Service returns a transaction history sorted by service. Link backs and email links are set up the same. You might want to limit the output by a

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single category like 'Health Services' or even a single service like 'Health Services: Massage'. You could limit the time period to "First Quarter", and so on.

Services Provided by Count: Services Provided by Count provides a list of services arranged by the number of transactions that have occurred for each service in descending order. Limiting the Time Period on the Query By Example form will let you compare time periods like this year and last year.

Services Provided by Hours: Services Provided by Hours provides a list of services arranged by the number of hours that have been transacted for each service in descending order. Limiting the Time Period on the Query By Example form will let you compare time periods like this year and last year.

Count of Services Provided by Category: Count of Services Provided by Category provides a list of services arranged by the count of transactions for each service category in descending order. Limiting the Time Period on the Query By Example form will let you compare time periods like this year and last year.

Hours of Services Provided by Category: Hours of Services Provided by Category provides a list of services arranged by the number of hours that have been transacted for each service category in descending order. Limiting the Time Period on the Query By Example form will let you compare time periods like this year and last year.

Last Member Year Transaction Hours: Last Member Year Transaction Hours looks at each members "last" full year based on their anniversary join date, and reports the total number of hours they provided and or received for that period. It could be useful for contacting or removing members that are not really participating, or for commending those who are.

Members Without Attributes: Members Without Attributes is a diagnostic report. Since this is a relational database system it is important that each member be assigned at least one attribute even if it is 'Private Attributes: No Attributes Assigned'. This will insure accurate reporting and maintain the connections between tables of data.

Members Without Contact Info: Members Without Contact Info is a diagnostic report. Every member should have at least one form of contact like an email address or phone. This report will locate those who don't.

Members Without Services: Members Without Services is a diagnostic report. Every member should have at least one Service Assigned even if it is Account Management: No Services Offered, to maintain database integrity.

Members Without Groups: Members Without Groups is a diagnostic report. Every member should be affiliated with at least one Group even if that group is the exchange itself, to maintain database integrity.

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Members Without Address: Members Without Address is a diagnostic report. It will list all members that are missing some part of their address information. Complete address info enables Mapping functions to work properly and if Mailing Labels are needed at any time for paper mailings to members.

Accounts Receivable: An Accounts Receivable report is created if the Annual Dues system is turned 'on' by setting Annual Donation Hours and/or Annual Donation Dollars to values other than zero in [Organization Info]. Members on this list may be marked 'Paid' if they have paid their dues, or they may be 'charged' some number of additional hours. At HEP we suggest \$25 and 2 hours annual donation. The 2 hours are debited automatically by Time and Talents.

No Attribute in a Category: No Attribute in a Category is useful for determining which members need to be contacted if you are surveying the membership to collect demographic attribute data.

Applicant Pool: Manage the status of new member applicants and activate their accounts once all references, release forms, etc are accounted for. Activating a member from this area sends them the email found in the [System Notices] > 'View Applicants' area. You also have access to the Admin Notes from the member's profile and may edit them here.

How Do I Customize a Report by Setting Criteria?

Member Type: Limit search to a member type.

Active: Limit search to active or inactive members.

Web User?: Limit search to those with login credentials.

Paperless (members)?: Limit search to paper only or paperless.

Zip Code: Limit search to part or whole zip code.

(when) Time Period From / To: Limit transaction search to a period of time.

(when) Birthday From / To: Limit search where birth date...

Age From / To: Limit search where member's age...

First Name ALL: Limit search where First Name.

Last Name ALL: Limit search where Last Name.

Workplace: Limit search to a workplace.

Group ALL: Limit search to a group.

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Balance ALL: Limit search where balance <, >, = amount.

Member Since From / To: Limit search where member since...

Last Activity From / To: Limit search where last activity...

Service Category: Limit search to a service category.

Service: Limit search to one or more services in a category.

Provide-Receive: Limit search to provide/desires a service.

Attribute Category: Limit search to an attribute category.

Attribute: Limit search to an attribute.

Provide-Receive: Limit search to posses/prefer an attribute.

Misc. Tasks

To Manage Member's Incoming Annual Donations of Hours and Dollars

An Accounts Receivable report is created if the Annual Dues system is turned 'on' by setting Annual Donation Hours and/or Annual Donation Dollars to values other than zero in [Organization Info]. Members on this list may be marked 'Paid' if they have paid their dues, or they may be 'charged' additional hours. At HEP we suggest \$25 and 2 hours annual donation. The 2 hours are debited automatically by Time and Talents on the member's join date anniversary.

To Manage Your Time Bank Name, Address, Phone, Motto, Website, etc.

Click [Organization Info]. >

Edit your exchange's information as required. >

Click [Save].

Notes: If you have a logo, forward it to us and we will size and upload it for you.

If you have a website, include the www. when you list it here.

In [Reporting] you may run a report to find 'High Debt Members' and set their member type to same. This allows them to continue to participate in the exchange but on an 'Earn Only' basis.

When they are less than 25 time dollars in debt the system will let them spend again, and reset their member type.

If 'Annual Donation Dollars' and Hours are set to zero, the whole donation collection system will be shut off.

To Manage the Content on the Member and Admin Login Pages

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Click [Organization Info]. >

Edit the left column, the right column and the middle column as required. >

Use the 'Source' button on the text area menu to paste in or edit raw HTML, or the editor will create it for you. >

Click [Save].

Notes: All three text boxes will save and support HTML tags.

Featured Events occupies the left column, Coming Events the right column, and Admin Content the center column.

To Manage Staff (Admin / Coordinator Logins)

Click [Manage Staff]. >

To add a new administrator fill in the form at the bottom of the page. >

Click [Add]. >

When 'Gen Mail' is set to [Yes] the admin will receive copies of general email generated by the system. (Image Uploads, Notices of Members 'billed' their Annual Donations (if that system is turned on), etc.)

When 'Join Mail' is set to [Yes] the admin will receive a copy of new member applications submitted from the Join form. (This info is also saved in the database and may be processed in the [View Applicants] area.) We STRONGLY advise the use of STRONG passwords using at least two each of: A-Z, a-z, 0-9, ! @ # % ^ & * ()

To Edit System Messages, Notices and Email Letters

Click [System Notices]. >

Select the content area. >

Edit the content as desired. >

Click [Save].

Notes: When you see a variable name like [OrgName], [Fname] or [Lname] the system will replace this with the actual value for your exchange or the member name, etc. The 'View Applicants' language area allows editing of the email sent to members when you setup their new profile. The 'Accounts Receivable' area provides editing of the thank you email for member donations, sent when they are marked paid in the 'Accounts Receivable' report in [Reporting]. The 'Join Form' allows you to edit some of the instructions on the join form, as well as the email sent to references when the join form is submitted by a potential member. The 'My Account Message' area provides access to the screen an inactive member will see should they try to login. It also allows editing of the screen members see if their annual donation is due (if that system is on).

If you have PayPal, we can place your PayPal button code on this page for you.