Using Integra Planner

Support for Choir Administrators

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Administrator Role

"Administrator" or "Organization Administrator" is a role in Integra Planner.

Administrators can:

- View and update choir contact and registration information
- Manage choir administrators
- View and update the choir membership list
- Register singers as delegates
- Enter and update choir program and performance
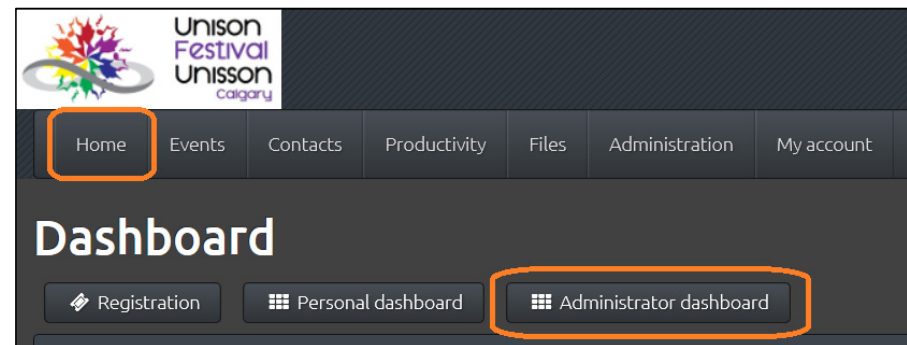- Create and pay invoices on behalf of the choir
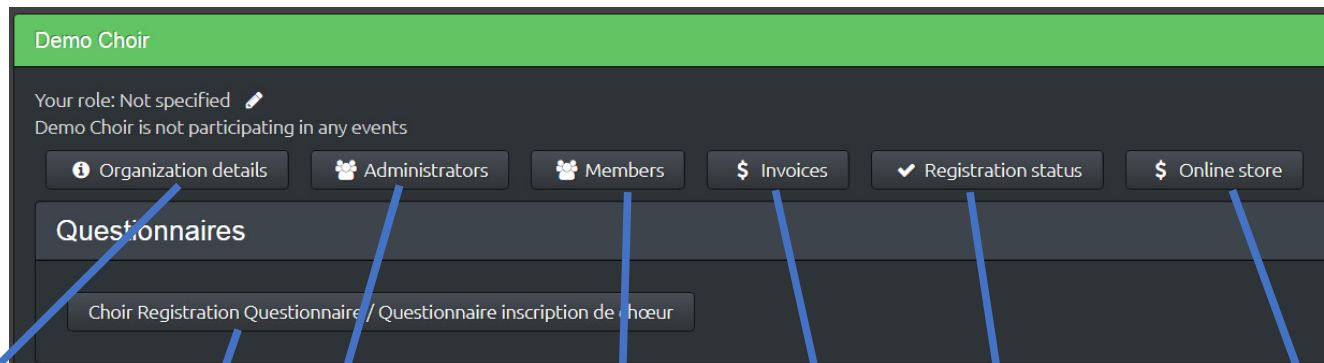
Administrator Dashboard Orientation (1)

Everything you need to do as a Choir Administrator in Integra starts from the Administrator Dashboard.

To get to your Administrator Dashboard:

From your "Home" screen, go to the "Administrator Dashboard", (unless Home takes you to the Administrator Dashboard already).

Administrator Dashboard Orientation (2)

Organization details
View and update contact information, links, choir details, and files (e.g. logo)

Choir Registration Questionnaire
View and update choir registration details

Administrators
Add or remove administrator permissions for choir members

Members
View, add or edit members; purchase registrations for members

Registration Status
View choir and member registration status; program information status

Invoices
View and pay invoices; send yourself an email copy of an invoice

Online store
Make purchases on behalf of your choir

Update Choir Details

1. From your "Home" screen, go to the "Administrator Dashboard", (unless Home takes you to the Administrator Dashboard already).

2. Click on "Organization details".

3. Fill in or update the fields as appropriate.

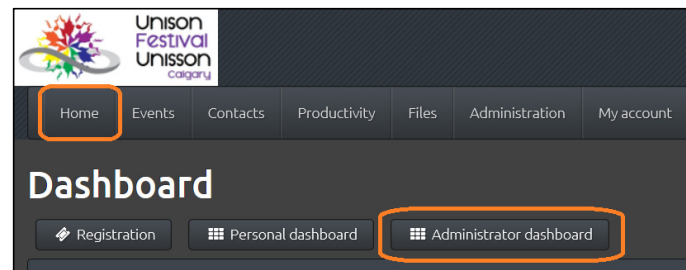   Note: All the address fields are mandatory.
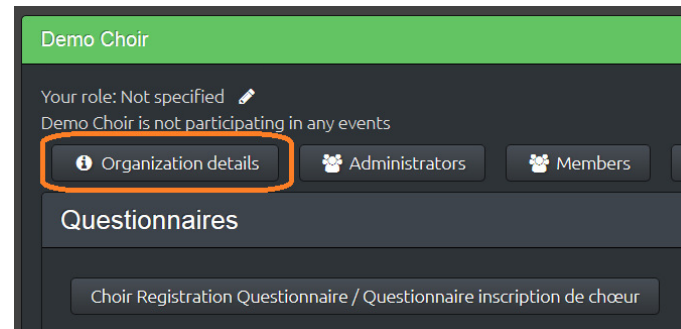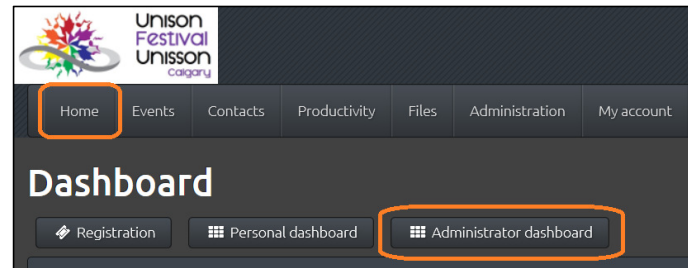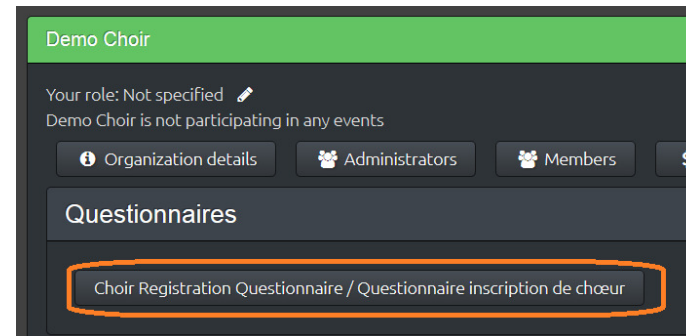
Update Choir Registration Questionnaire

1. From your "Home" screen, go to the "Administrator Dashboard".

   Note: "Home" may take you directly to the Administrator Dashboard.

2. Click on "Choir Registration Questionnaire".

3. Fill in or update the fields as appropriate.
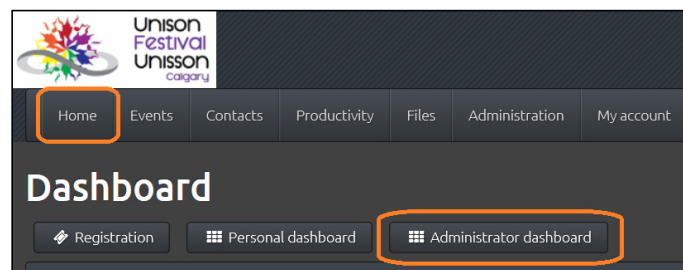
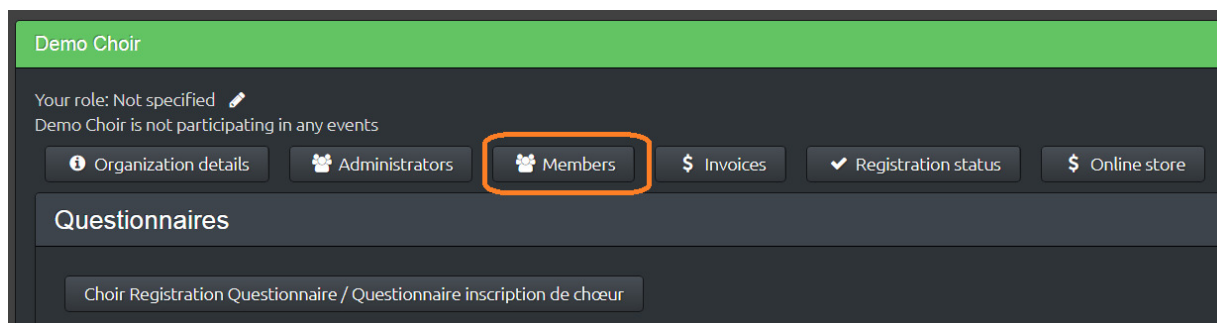4. Click "Save" at the bottom.

Add Members
Step 1

From your "Home" screen, go to the "Administrator Dashboard".

Note: "Home" may take you directly to your Administrator Dashboard.

Select "Members".

Add Members
Step 2

Select "Add/edit members".

Select "Add member".

"Membership report" takes you back to the previous screen. "Purchase for members" is covered under Register Members.

Add Members Step 3

Fill in the member's contact details. Mandatory fields are in yellow.

When ready, click "Save".

Note: The member's email address cannot be changed once it is entered. Double-check spelling before saving!

The system will send an email to the member asking them to confirm their account and accept the Integra Terms of use.

They will need to complete this step before you can register them.

Add Members
Step 4

Once you have finished adding members, click on "Membership report".

Review the list to confirm that all the member information is correct. If an email address is incorrect, it is easiest to delete that member and add them again with the correct information.

From the list of members, you can also see which members have confirmed their email address and which ones have registered.

Add / edit members	Purchase for members	⬇ Export to Excel							
Members of 'Demo Choir'									
The email address column shows the user's main email address, which they use to log on. Optionally, there is a second email address specific to their membership of this organisation.									
							Test Unison Festival Unisson 2018		
First name	**Last name**	**Voice part**	**Role**	**Email address**		**Has logged in**	**Registered**	**Registration date**	**Paid**
Cora	Testing	Alto	Director	filiarara@gmail.com		Yes	Registered	Nov 4, 2017	Paid
First	Soprano	Soprano	Singer	sop@domain.com	❗ Email address not verified	No	Not registered		Not paid

Invoices

1. From your "Home" screen, go to the "Administrator Dashboard".

   Note: "Home" may take you directly to the Administrator Dashboard.
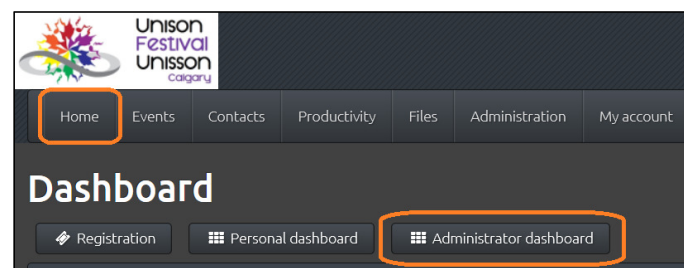
2. Click on the link for the unpaid invoice or select "Invoices".

3. Proceed with payment.
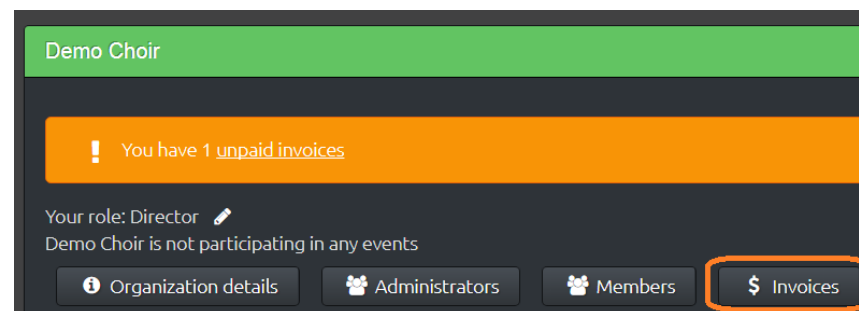
Register Members

As an administrator, you can purchase delegate registrations for your members:

    a.   **Purchase registrations for specific members**

    b.   **Purchase registration credits to assign to members later**

    c.   **Purchase a combination of both**

1. Navigate to the "Administrator dashboard".
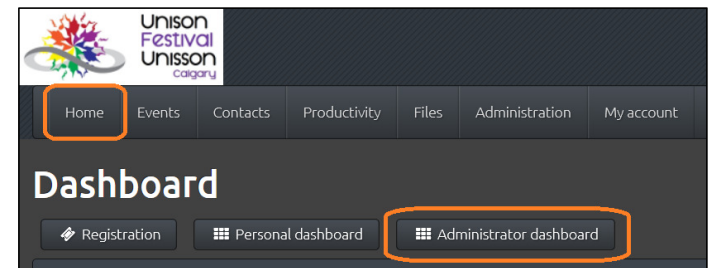
2. Select "Members".
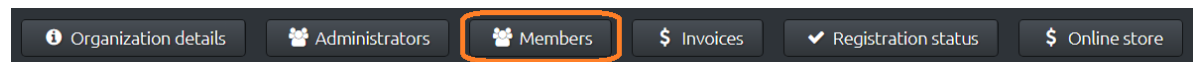
3. Select "Purchase for members".
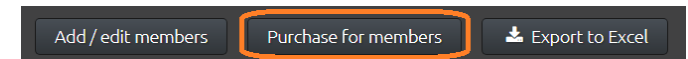
Register Members
Assign at Purchase

In the "Members of '**Your Choir**'" section, select a delegate registration rate for each member you would like to register.

Click "Invoice and pay".
Proceed with payment.

Invoice and pay

Discounted registrations are for seniors over 65 and youth under 18. Proof of age will be required at the registration check-in desk.

Members of 'Demo Choir'

First name	Last name	Voice part	Role	Registration status / Previous purchases	Item
Cora	Testing	Alto	Director	Registered, Paid 1 x Delegate Registration Early-Bird	
First	Soprano	Soprano	Singer	Not registered, Not paid	
Prima	Tenor	Tenor	Singer	Not registered, Not paid	Buy: Delegate Registration Early-Bird Buy: Discounted Delegate Registration

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Register Members
Purchase Credits – Step 1

In the "Purchase credits" section, fill in the number of regular and discounted registrations you would like to purchase.

Click "Invoice and pay".
Proceed with payment.

Invoice and pay

Discounted registrations are for seniors over 65 and youth under 18. Proof of age will be required at the registration check-in desk.

Purchase credits

You can purchase non-refundable credits if you want to ensure availability or secure an early discount price. You can allocate these to your members.

Item	Quantity	Unit price (CAD)	Total price (CAD)
Delegate Registration Delegate Registration Early-Bird		175.00	
Delegate Registration Discounted Delegate Registration		100.00	
		Total price	0.00

Register Members
Purchase Credits – Step 2

To assign credits, return to "Purchase for members".

From the drop-down menu under "Item", select "Use credit" for the appropriate registration level.

Credits must be paid for before they can be assigned to members.

Members of 'Demo Choir'					
First name	**Last name**	**Voice part**	**Role**	**Registration status / Previous purchases**	**Item**
Basso	Profundo	Bass	Singer	Not registered, Not paid	▼
Cora	Testing	Alto	Director	Registered, Paid 1 x Delegate Registration Early-Bird	Use credit: Delegate Registration Early-Bird Buy: Delegate Registration Early-Bird Buy: Discounted Delegate Registration
First	Soprano	Soprano	Singer	Not registered, Not paid	▼

Click "Invoice and pay" to complete the transaction.

Invoice and pay

Register Members
Final Step

Members of 'Demo Choir'

The email address column shows the user's main email address, which they use to log on.
Optionally, there is a second email address specific to their membership of this organisation.

						Test Unison Festival Unisson 2018
First name	Last name	Voice part	Role	Email address	Has logged in	Registered
Basso	Profundo	Bass	Singer	bass@domain.com ❗ Email address not verified	No	Registered ❗ Needs to log in and complete registration questionnaire ⓘ

Once you have registered your members, please ensure that they log into Integra and complete their **Delegate Registration Questionnaire**. This questionnaire captures essential information for delegate name badges, as well as acceptance of the Unison Festival Registration Terms and Conditions.

Members will find the Delegate Registration Questionnaire on their "Personal Dashboard" in Integra.

Personal dashboard

Generic navigation menu

◆ Registration   👤 Contact details   👥 Membership

Unison Festival Unisson 2018

Friday, May 18, 2018 - Monday, May 21, 2018 in Calgary
Registered: Nov 4, 2017
Registration questionnaire submitted: Nov 10, 2017
No events found

$ Online store

📄 Delegate Registration Questionnaire / Questionnaire inscription de délégué