

SAMEPAGE PLAN – QUICK START GUIDE

For the first setup of SamePage Plan, you will move along the icons at the top of the screen from right to left. The icons are laid out to work from left to right on an everyday basis, but the first setup makes a bit more sense working backwards. This guide is used for the first time setup.

A. Switch Member – not needed for setup

B. Advanced Options

This allows you to customize your software by adding themes, managing attachments and templates, globally sending notifications and performing a manual sync.

1. Themes can be a way to organize your songs and content by groups. These can be added to the song as you import them or can add them later in the song database.
 - a. Add theme titles for organizing music (ie. Christmas)
 - b. You can also add these in the songs tab

C. New Song

Add a Song is the importing wizard to bring new content and songs into the database.

1. Choose "One song" or "Multiple songs"
 - a. If "One Song", add Title and Key (everything else is optional)
 - b. If "Multiple Songs", skip to next step. You will just import the content and it will take the file name as the song title.
2. Choose "Browse for Files", and select the piece(s) of content you want to upload.
3. Select Key and Instrument for each piece of content.
4. Choose "Create Song".
5. Assign the appropriate theme, if necessary.

D. Songs

After songs are added in the previous step, you can make any tweaks to the music here.

1. Select edit
 - a. Make tweaks to the specific piece of content by choosing "Edit".
 - b. Choose the piece of content by key that you might need to annotate/preview.
 - i. Annotate with either the paint or text options.
 - ii. Navigate through the pages with the arrow keys.
 - iii. Save by clicking the disc icon or close the window with the X icon.
 - c. You can merge the pieces of content by selecting the icon and selecting the piece for it to be linked to.
2. Add the appropriate "Theme", if applicable.
3. Add the song to the playlist by selecting the plus icon

E. Positions

Positions are all the positions/jobs that you need filled by members in each location.

1. Create a position group (sound team, band, children's team, greeters, etc.)
2. Create sub positions underneath (vocals, guitar, drums, stage left, etc.)

F. Stations

If using a SamePage station or software package, you will have a station license available here.

1. Choose "Edit" to rename the station.
2. Select "Register" to add the license available to the computer you are currently using.
3. Choose the drop down and add positions to that station.

G. Instruments

Each position needs to be assigned to the appropriate instrument. So the appropriate music shows up on the correct station by default, you want to select the instruments that will play at that station position. Since music is imported with an instrument assigned, an instrument is assigned to a position, and a position is assigned to a station. This is where the three integrate.

1. Assign the appropriate position to the corresponding instrument.

H. Resources

Resources are items that are needed for the organization or your plans, such as projectors, TV's, Vans/Buses, etc.

1. Add a resource. You can easily edit and delete it.

2. Assign it to the positions needed.
3. Set a member contact, if necessary.

I. Members

Members are people scheduled to fill positions. Members must be created for login and station performance capability

1. Add the member detail
 - a. Security Settings
 - b. Username and Password
 - c. Save the changes
2. Add the positions this member can fill.
3. Add the notification methods for this member. By adding an email, you can notify them later.
4. Modify their settings under the advanced options.
5. Set the availability of the member.

J. Locations

Locations are a sub-grouping inside an event letting you organize your events by categories of your choice.

1. Create locations (for example: sanctuary, orchestra pit, city, etc.)
2. Add the positions needed for that location by choosing "Edit Positions".

K. Events

Events are the main part of your plan. This page allows you to plan your events with all the locations corresponding to that specific event. The listing will show the next event at the top and the entire list below that.

1. Add Title, Series, Date Time
2. Once created, choose drop if you need to select an end time.
3. Select what locations you will need at this event.
4. You can launch the plan by selecting the icon.

L. Event Planner/Current Plan

Plans are your organizational tool for event planning. These plans are created by choosing the event and then selecting the appropriate tab for the location. You will then see the positions you have selected that will need to be filled.

1. Choose the drop down for each position group and assign those who are to fill the spots.
2. Once all are assigned, choose "Send Notifications" if emails are to be sent for scheduling.
3. The color coding will show you what is happening with each member.

M. Home

This calendar shows what day it is today (in blue) and what is happening at each event that has a corresponding plan. By clicking on the link, you will receive the current plan. The color coded progress bar will be the entire event's status as opposed to the group breakdown found in the plan.

N. Order of Service

Once you are ready to create a playlist, you can add the music by going to the songs icon and choosing "Add to Playlist". You can also categorize the order by choosing "Add" in the order of service window. You can create a header category and organize the music underneath and also add items to fill in. For example, you may add music and items including greeting, interlude, or closing.