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Common Tasks

ID	Use Case	Dev or Training	Notes
1	BCLA ED wants someone's contact information.	Training	searching for contact
2	BCLA ED wants to know how many members we have that are [eg from area X]	DEV	new report, users by region
3	BCLA Staff member is asked to post a letter that BCLA sent to a politician		confirm Allie and Angie already know how to do this on public site
4	BCLA Staff member is asked to post an event with registrations Also, sets up highlight to show this event on the home page).	Training	and collab with devs
5	Member wants to sign up for an event. (They try to register and see the nonmember pricing, so log in and then discover they have lapsed as a member. They then renew and go to register and see the member rates.)		Core Feature of Site, ask devs to set up new event
6	BCLA Staff member needs to change membership pricing		infrequent, ask devs to do this
7	BCLA Staff member needs to change menu items		infrequent, ask devs to do this
8	BCLA Staff member needs to reconcile payments received via credit card processor. (Exports transactions from processor, then goes into back end of website to match names to payments. Notes in file (excel) what each payment is for (e.g. J. Smith BCLA personal membership expiring March 2016).)	DEV	need to confirm format for payment report
9	BCLA Staff member needs to contact all current members to advise them of something pertaining to members only	Training	
10	BCLA wants to sell an item		infrequent, ask devs to do this
11	BCLA needs to remind a member to renew		automatic reminders sent out 4 weeks and 2 weeks before expiry, and 1 week after
12	Board member changes employer, e.g. BCLA staff member updates the Board page		confirm Allie and Angie already know how to do this on public site
13	Member cancels registration in an event- refund the money (or part of it)	Training	how to remove registration and refund out of stripe
14	Member has changed their email address.	Training	how to edit a contact
15	Member needs to retrieve their password (or have us re-set it).	Training	Self-service function of the site, but show Allie and Angie how to manually reset a users password
16	Member wants to buy supplies for the Summer Reading Club.		infrequent, ask devs to do this
17			
18			
19	Member wants to make a donation.		Now core feature of site

ID	Use Case	Dev or Training	Notes
20	Member wants to renew their membership	Training	core feature of site, show Allie and Angie how to manually renew member
21	Member wants to join the BCLA Board		Clarify requirement
22	Member wants to review old Resolutions or News items.		Clarify requirement
23	Member wants to submit a resolution (they review past resolutions, then review the submission procedures and download the form)		Clarify requirement
24	Member wants to submit an Award nomination (They review the awards history, download the award form and email it in)		Clarify requirement

Problems

ID	Use Case	Dev or Training	Notes
25	Member has accidentally made a duplicate purchase. (We log in and remove the other item and refund the extra money. Memberships are generally not refundable, but we have refunded two in very special circumstances.)		need to confirm but believe this should be reduced with new system
26	Member has renewed "too early" (duplicate).		don't believe this is a problem, new membership should be tacked on to the end of the old one
27	Member unsure of type of membership *(institutional or personal) due to lack of clarity in our receipts		needs discussion to understand actual issue
28	Member needs a copy of their receipt or invoice (for a membership / donation / event)	Training	show Angie and Allie how to issue receipts manually
29	Expired member attempts to "join" with address already in our member DB(should be renewal)		membership requires creation of an account, which is linked to email address and cannot be duplicated.
30	Groups are unable to upload documents of a type or size they wish to share *(ie images, word docs).		Phase 2
31	Groups have difficulty using the interface (staff assist with the updates)		Phase 2

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