

# Division and Area Director Guide to using easy-Speak

author: Michael Dobbins, version: 1.6

This document is a guide for using easy-Speak for Area and Division Directors.

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A note about using easy-Speak in a desktop browser that is not immediately obvious: hover and click

You must hover the mouse pointer over tabs and menu list items that open a sub menu list to see the sub menu list. Clicking on these does nothing except make you move off and then hover again..

A menu list item that opens another page must be clicked.

On the left under your user name is a list of links to the clubs, areas, divisions where you are a member or have navigated to recently.

Actions are context sensitive. i.e. You must be in the Division/Area/Club page to take actions in that Division/Area/Club. Look at the top line of the page to see where you are working.

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## **Division and Area Director permissions**

A Division Director may:

1. Set or change your own Division officers (including next year)
2. Set or change Area officers (including next year) in your own Division
3. Set or change officers of a Summary club in your own Division (including next year) but not an Active club. Only a club officer or an admin may change the officers of an Active club
4. Send a mass e-mail to any type of officer in your own Division
5. See all the charts for any club in your own Division

An Area Director may:

1. Set or change your own Area officers (including next year)
2. Set or change officers of a Summary club in your own Area (including next year) but not an Active club. Only a club officer or an admin may change the officers of an active club
3. Send a mass e-mail to any type of officer in your own Area
4. See all the charts for any club in your own Area

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## Exploring the District

One way to explore the District, find clubs and see the general structure is through the Directory tabs:

- For the District, under tab:  
**District Directory -> Division Directory.**  
This page lists the District officers and a link to each Division (a list of clickable letters under “District 38”.)
- For a Division, under tab:  
**Division Directory -> Division Directory.**  
This page lists the Division officers, the Areas and Area Directors as well as all the clubs in the Division. (click on the Area or Club name.)
- For an Area, under tab:  
**Area Directory -> Area Directory.**  
This page lists the Area officers and all the clubs in the Area (click on the Club name.)
- For a Club, under tab:  
**This Club -> Club Directory.**  
This page lists the Club officers as well as meeting and other summary information.

Another structure that you can follow is in the left menu under the section: **Organization**. Sometimes it is easier to use this method. (for Districts with incomplete e-S definitions, you can find parts of the organization not showing in the directory structure described above.)

You may also find clubs in Tab: **“Go to ...” -> “Club search”**

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## Sending Mass E-mail

A very useful feature of easy-Speak in a fully populated District is to send a group email to selected types of officers. The types of officers include all club officers, Area directors, Division Directors, and Division Directors, officers and Staff. The list of officer types is dependent on your role privileges and which club, Area, Division or District you are viewing. After each role is a number in parenthesis that indicates how many people are filling the role.

Email is sent using a Blind Copy, responses will only come to the originator. This is great to disseminate organization information and not propagate replies to everyone. Discussion should be held in the forums.

Mass E-mails should only be sent to a specific target audience that is related to the material being sent. ex. If the message is for Area Directors, do not send it to club officers. Remember the context of the person receiving, anything not relevant to their role is spam.

Mass E-mails are requested in the top bar tab:

### **“My Communication”**

There is an edit tool bar above the message body box. You can show or hide it with the little triangle icon in the middle of the top border of the box.

The “insert from word” tool can have side effects. I have never been able to successfully send a message that had used “insert from word” and then edited the message. Only “insert from word” then send without any editing works.

If your send worked, you will always get confirmation screen with all of the user names that were sent the email. If you do not get this confirmation, it was a silent fail. You may change something and try again.

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## Updating Officers

A Director may update the officer list for any Division, Area or Summary club in their scope, including the Director position you hold. A Director may add officers who are not already in the system to populate the officer list.

The Director role does not have permissions to edit any other user in easy-Speak or reset their password. However, you may have permissions for a different scope, if you hold an office with those permissions. ex. a VPE may edit any member of the club where they hold the VPE position, but not go beyond that scope if they hold a Division Director position.

If you find incorrect or missing email, Toastmasters number, awards, language (English-US) or time zone (GMT -5), please, try to find the correct data and forward to the D38 IT Support office to be updated.

To find the Officers list:

- For a Division, under tab:  
**Division Directory -> Division Officers**
- For an Area, under tab:  
**Area Directory -> Area Officers**
- For a Summary Club, under tab:  
**This Club -> Club Officers**

If you see in the far right of the Officer List a column titled: **“Change to this username”**, you have permissions to update that Officers list.

Each row contains a field to type in a user name and a button titled **“Find a user”**. If you know the persons easy-Speak user name, type it in the box. Otherwise, try to search for the person.

It works best to find and validate or add user names for all the Officers you wish to change before trying to update the list. During this process, temporarily keep the user names in a notepad or spreadsheet to make it easier to cut and paste

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them into the Officer list or recover the usernames on some failure.

The best way to find and validate user names is top bar tab **“Go to ...”** -> **“User search”** and validate from the profile that is displayed for a selected user name..

You could use the **“Find a user”** button in the Officers list, but that directly puts the username into the officer list skipping the display of the user profile for validation.

Since easy-Speak is used worldwide, it is important to qualify the user by looking at their profile to see if they are in our District and/or expected clubs. Names are not unique, but Toastmaster member number and email address are checked for uniqueness to a single easy-Speak user.

In either case, try a couple of different search values. Some search examples:

1. The person's Toastmaster member number (unique)
2. The person's email address (unique)
3. The person's name, first or last or both, or some subset

If you find a match, select the user in the pull down list to see the profile or to insert the user name into the Officer list box.

If you did not find a match, click the **“close window”** link or the **“X”** to close the popup.

If the user was not found, you will then need to add a new easy-Speak user. It is important to always search for a person before trying to add as we have a large percentage of Toastmasters in D38 already defined in the system. It is very important to link an existing account for a person and not create a duplicate.

Adding a user for an officer list is the same as adding a new member or visitor to a club except you do it from the Officers list page. Click the **“add user”** button near the center bottom of the Officer list page to popup the add user form.

As a Director, you may download a membership list for your Area/Division/District from the District Central page at Toastmasters.org. This can provide some of the details to add a new account.

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In the add user popup, set the status to “member” and adjust the date, if needed. Select the radio button “**Input full name and email**”, enter “**First or given Name**”, “**Family Name**” and “**E-mail address**” and click “**Submit**”.

In the next popup create and enter a “**username**”. Remember, cut and paste or write down, the username for the update officers step.

Good user names are the first 3 or 4 letters of the first name followed by the first 3 or 4 letters of the last name. The username must be 6 or more character long.

You may enter one or more **phone numbers**, Finally click “**Create New User**”.

At this point you may have to handle conflicts or other problems. If one or more users are displayed, you should look at their clubs under their name to verify them or click on the user’s name to drill down into their profile to verify. If one of these users is the correct user, connect them to the club.

Enter the new usernames into the boxes for each officer that you are changing. Then click “**Submit changes...**”

You may “**Submit changes...**” for a single officer or change them all at once. If you do multiple officers at once, it is recommended to find and validate or add all user names first, then cut and paste these usernames into the Officer list form. If there is a failure, you may have to recreate the Officer list form and resubmit.

Directors may not edit users. Only the member, certain officers in their club or an administrator may edit a member. If you find errors, please contact the IT Support Office to make corrections.

If you have added a new member to a Summary club, please inform the the D38 IT Support office to complete the user’s information. If you know any of the following, please forward that as well:

“**Toastmaster Membership Number**”

“**Current Toastmaster achievements**”, ex. CC, CL, DTM.

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### Club charts

For Active clubs, there are a number of club charts that may be of interest to District Officers.

To see charts from a club, go to the club easy-Speak site and tab: **This Club -> Club Charts**

Club charts of interest:

- Goals Chart
- Communications Chart
- Leadership Chart
- View Mentors

Another useful tool to the overall health of the club is the Annual Meeting Review. See tab: **This Club -> Annual Meeting Review**



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### Club meeting list

For active clubs, a District Officer may find some data on club activity by looking at the club meetings. To help see the health of the club there are two columns: Attendance and Speakers.

To see the club meeting list, go to the club easy-Speak site and tab: **Meetings -> Meeting List**

To see the details of a meeting, click on the meeting.

You may have to adjust the meeting date range in the upper right to see more future meetings.

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## Division and Area meetings

Division and Area Directors may schedule, invite and track attendance for a number meeting types for their Division or Area:

1. Toastmaster Meeting (Can be used for contests)
2. Committee Meeting
3. Other Event
4. Officer Training
5. Council

Meetings are accessed via the top bar tab "Meetings"

All meetings create a calendar entry with an optional short description (message body text field in the message edit view.) A structured agenda uses templates for the Division or Area using the same tools as for a club.

Toastmaster Meeting:

Attendance list:

Division: Division Director, All Area Directors in Division, All club officers in Division

Area: Area Director, All club officers in Area

Agenda:

Structured agenda and meeting text

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Council:

Attendance list:

Division: Division Director, All Area Directors in Division, Other Division officers (IT Support, committee)

Area: Area Director, All top 3 officers (President, VPE, VPM) of clubs in Area, Other Area officers (IT Support, committee) (bug: if officer holds multiple officer roles, the lowest ranking role name is listed in attendance list, not the highest.)

Agenda:

No structured agenda, only meeting text.

Training:

Attendance list:

Division: Division Director, All Area Directors in Division, All club officers in Division

Area: Area Director, All club officers in Area

Agenda:

Structured agenda and meeting text

Comittee meeting:

Attendance list:

Division/Area: only officers of that Division/Area

Agenda:

No structured agenda, only meeting text.

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Other event:

Only creates a calendar entry.

No attendance list, structured agenda or meeting text.

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## Using active Divisions and Areas

Outside a club the concept of “Members” is different.

For Officer Training and Council meetings we know the potential attenders, i.e. the appropriate officers and directors. But for a contest.....

If you imagine running the Contest for a District the drop-down list of potential role-takers would be around 3000 people and the list of possible attenders would be the same size.

That's obviously impractical - you wouldn't find the one that you wanted and the screen would take maybe 30 minutes to refresh each time (assuming it didn't crash and die before then)

So...

Outside a Club the default list of potential attenders and role-takes is made up of:

- \* Anyone who used the “thumbs up” to book themselves as attending this event

- \* People who attended an event at this unit in the last year or so (they tend to be regular visitors)

- \* All officers of that unit

- \* Officers of “lower” units - for an Area that will be all club officers. At District it defaults to District, Division, Area officers and Council members from the clubs

- \* If you need to assign a role or speech to someone who is not listed you can either encourage them to book themselves as attending (see above) or use the “Add user” button to add that person as a “Member” of the Area/Division/District (use an effective date just prior to the contest). They will then show on the attendance and potential role-takers lists.

It's possible that someone may show in the User list as a “Member” but not have attended an event recently so they will not be listed as potential attenders (if this

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is an issue, add them again to refresh the connection)

(Hint - I find it easier to locate the person by name from the Menubar > Go to > User Search, make sure it's the correct user by looking at their profile, and then copy/paste the username into the add user pop-up)

Outside the club level the User list defaults to "Officers only". Other "Members" will show up in the User list if the "Officers only" check box is unchecked before selecting any other check box.

"Members" can be managed via the User list. Individual Communication and Leadership progress is accessible there. There are no Area charts for the "Members".

Roles may be assigned from the attendance list pulldown on the role.

Speeches may be requested/assigned for a meeting using the "Request a Speech" button on the right of a specific Speech slot or in the User list using the "Request a Speech" button on the right of the members name. Only added "Members" can be assigned to a speech.

Meeting email work in a similar way as in clubs.