BATON SYNC®

User Guide

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User Guide

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GETTING STARTED WITH BATONSYNC

This handy guide will allow you to get your director account ready to use.

SPECIFICATIONS

The user should be able to complete all of the paths autonomously to set up their director account with little to no help or user support. We want the paths to be intuitive so that the director finds it to be easy with no frustrations.

MILESTONES

We highly recommend completing the setup milestones in the following order: Log-In, Schools, Students, Instruments, Equipment, Lockers, Uniforms, Ensembles, Music Library, Finances. This will allow for better user experience and ease of use in the initial program setup phase. At this time, we do have both manual entry and batch uploading in each of the main feature areas. The forms are meant to be simple and intuitive so that a parent volunteer or student aide could assist with data entry if needed. Thank you so much for your patience as we are only a two-person team working on this project part time at this time.

Create Director Account & Log-In

To create a BatonSync account, visit www.batonsync.com and sign up.
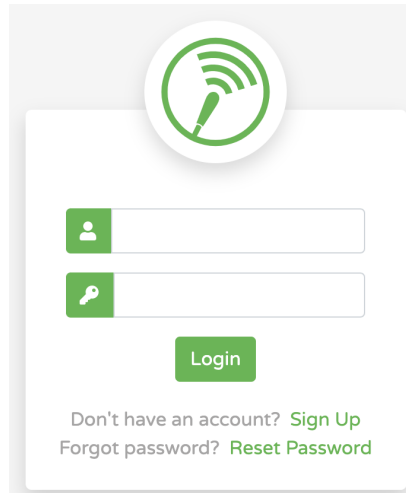
If you are new to BatonSync, then click on "Sign Up" to enter a username, password, and payment information to get started. Our payment processing is secure and powered by Stripe. You can register monthly or yearly with a credit card, or we also have the option to create an invoice for your school/school district. Choose the account option that is right for you!

After that, you can simply log in with the login button in the upper right of the webpage.

There is also a demo account "sandbox" where you can play around with some premade schools and other information. Log in with Pat Demo!

<div align="center">Username: pdemo   password: demoletmein</div>

* Note: All names, schools, serial numbers, and all information in the demo account is completely fictional and any resemblance to real entities is strictly coincidental.

Schools

To create a school, the first step is to click on the "+ New" button in the Schools List. Enter the name of the school, the minimum grade level at that school, and the maximum grade level at that school, then click the "Add School" button.
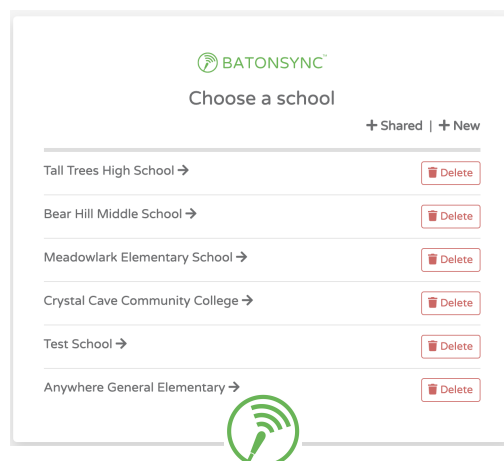
To edit a school's name, the director needs to click on the arrow button from the schools list page (→) after the school's name. Click on the gear icon next to the school name. Then, change the name and minimum and maximum grade levels, if you want to, and click on the "Save" button.
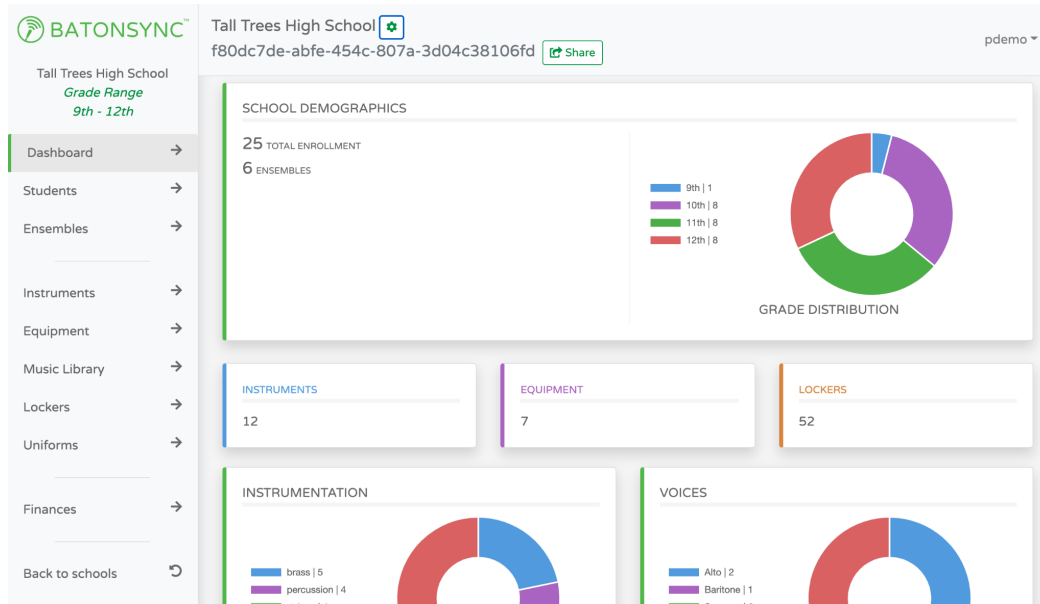
To add more schools, click on the "Schools Hub" menu item on the left hand side of the screen. You can also add a school that you share with another BatonSync user by clicking the "+ Shared" button and entering the code from the school that the other director wants to share with you. After you create a new school, you can also share your 32-character code with another BatonSync user, such as an assistant director. Both directors will have access to all of the information in that school, but only the original owner of the school will be able to delete it. The owner can stop sharing the school from the account settings by clicking on the stop sharing button.

To add students, ensembles, instruments, equipment, music library, lockers, uniforms, and/or finances to a school, the director needs to click on the arrow button from the schools list page (→) after the school's name. The first screen is the school's dashboard, and this screen will change as you add more information to each school.

At this time, we are limiting the number of schools to eight. We are doing this to make sure that users are actually using BatonSync for the purpose it was intended. If you are a traveling teacher with needs for more schools, then please contact us and let us discuss your situation and how we might find a solution.

Students

To add a student to a school, click on the arrow button from the schools list page (→) after the school's name for where the students attend school.

On the left, click on the "Students" menu item. Click the "+ New" button to add a new student to the school. Enter information in the boxes for the student's first name, last name, gender, email, grade, phone numbers, primary instrument, and/or voice. Choose items from the drop-down menu for primary instrument, grade level, gender, and voice part. Then click "save". When the box closes, the new student's name will appear at the bottom of the list, but if you refresh or navigate away from the page and then come back, then students will be listed alphabetically by their last name.

To edit a student's information, click on the student's name. This will take you to the student detail page. From there, you can click on the pencil icon next to the student's name to edit the first name, last name, email, primary instrument, grade level, gender, folder, and/or voice part.

Directors can also upload their current student spreadsheet using the Upload button on the students list page. A box (pictured below) shows up with instructions.

Click on the template link and the spreadsheet template will download. Simply put your own columns in the right places on the template. Fill in (or copy & paste) first name and last name, and use the dropdown menus for instrument, gender, and voice (optional). There are also optional columns for email and phone numbers. Then export as CSV (.csv). This will be a choice from your File menu most likely. Save it as a CSV on your computer. Then click on "Choose File" in the box above on BatonSync, and choose the CSV file that you just created. Click upload. Your students will show up automatically in the students

part of BatonSync with all relevant information present. Instructions are also on the template itself.
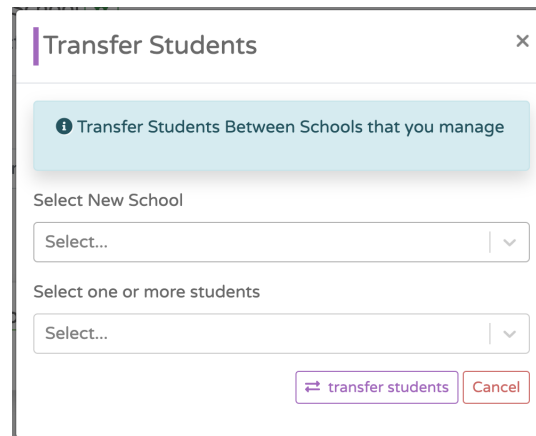
The "Closeout" button on the right side of the students list is mainly for the end of the school year. This button will deactivate students from the highest grade level at the school on the roster and move them to the alumni list as well as advance all other students by one grade level. This button will also remove all students from all ensembles so that the director can re-assign students to new ensembles for the following year (or at any time after the roster closeout button is selected). Uniform, instrument, equipment, and financial history will be preserved. The roster closeout button can only be undone by editing individual students details from their individual students detail pages and/or reactivating students from the alumni tab and returning them to active status. Pressing the roster closeout butting repeatedly is NOT advised unless you want to redo practically everything...And no one has time for that!
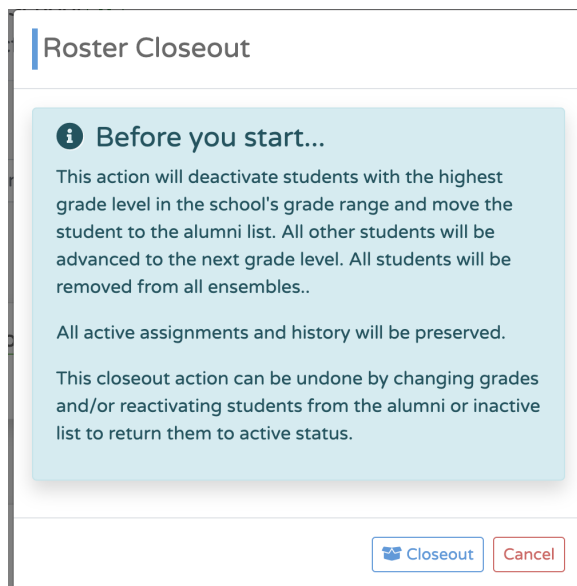
You, the director, can also choose to see the alumni students from your program by choosing the " → Alumni Students" tab on the right-hand side of the student list page. The alumni list will include any students who advanced out of the school via the "Closeout" button or the students who you have deactivated from your school for other various reasons including but not limited to: unenrolling for your classes/program/school, moving, quitting, etc. Simply click on the "Deactivate" button on the student detail page. You can easily switch back to the active students list by clicking on the "← Active Students" tab from the alumni students list. You can also reactivate students by clicking on the "→ Alumni Students" tab, choosing the student's name, and then clicking the "Reactivate" button. This would be if a student moves away and then returns to your school or something similar.
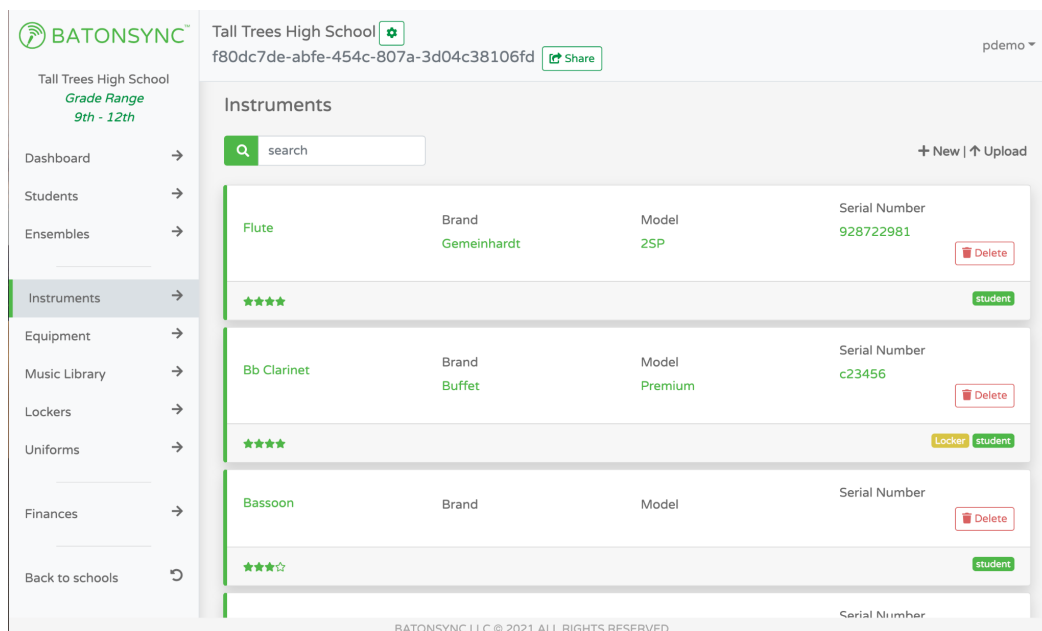
As an alternative to the Roster Closeout button, the director can leave the students activated first, and choose the "Transfer" button. You should select the student, the school they will transfer to, and the grade level that the student will be at the new school. The best use of this button is for students going from middle school to high school with the same teacher at both; this way, you can keep all of the student's historical information. Since this is an individual process, each student will have to be transferred individually between your schools, but you can select them all for transfer at the same time. The rest of the students can be advanced in grade level with the "Roster Closeout" button.

Instruments

To add instruments, click on the arrow button from the schools list page (→) after the school's name for where the instruments will be added.

On the left side, click on the "Instruments" menu item. Click the "+ New" button to add a new instrument to the school. Enter the type and condition from the dropdown menus. These are the only two fields that are required. Then the director can enter the brand, model, serial number, and a specific district number (for fixed assets or bar code numbers if your district does that). Lastly, the director can enter an exact or estimated value of the instrument (without the dollar sign). Then, click on save. When the box closes, the new instrument's name will appear at the bottom of the list and the condition will appear as a star model.

Excellent	=	4 of 4 stars shaded
Good	=	3 of 4 stars shaded
Fair	=	2 of 4 stars shaded
Poor	=	1 of 4 stars shaded
Beyond Repair	=	0 of 4 stars shaded

To edit an instrument, click on the instrument type to navigate to the instrument detail page. Then click on the pencil icon to edit the instrument attributes including type, condition, brand, model, serial number, district number, and value.

To check out an instrument to a student, click on the " ← Checkout" button next to the student checkout history box on the instrument detail page. Choose the student to whom you are assigning the instrument from the dropdown menu, or you can start typing the student's name to do a search. All students that the director has entered, regardless of school, will be displayed. This is so that directors who teach at multiple schools can share some instruments with any of the students that they manage. Then click on the "Save" button. When you refresh the instrument list page, the display should now show that the instrument is checked out to a student with a green badge that says "student", and the

instrument detail page will show the name of the student(s) to whom the instrument is assigned. Additionally, the instrument will now display under the instruments part of the student detail page. Instruments can be assigned to more than one student, and all students that the director has entered are available to check out instruments even if the student attends a different school (this allows for directors to share instruments between students at different schools).

To add a note about a specific instrument, go to the instrument detail page. Scroll down to the notes section. Click on the "+" button to add a new note. Notes for instruments might include things like: "Includes a straight mute", "There are several dents on the bell", "This instrument was donated in 2013", "This instrument is in the brown case," or anything else that the director might want to keep notes about the instrument. You can also add repair notes on each instrument with the cost of the repair and the work/repair that was completed as well as the repair note being time stamped and date when you enter it. This can be very beneficial when trying to justify replacing an instrument.

Directors can also upload their current instrument spreadsheet using the Upload button on the instruments page. A box (pictured below) shows up with instructions.

Click on the template link and the spreadsheet template will download. Simply put your own columns in the right places on the template. The only required fields for instruments are type and condition. Then export as CSV (.csv). This will be a choice from your File menu most likely. Save it as a CSV on your computer. Then click on "Choose File" in the box above on BatonSync, and choose the CSV file that you just created. Click upload. Your instruments will show up automatically in the instruments part of BatonSync with all relevant information present. Instructions are also on the template itself.

To check in an instrument, the director can search for the brand, model, serial number, district number, or condition in the search box on the right, or scroll down to the particular instrument. Double check the numbers on instruments, such as district number or serial number, with the student. Click on the instrument type to navigate to the instrument detail page. Then simply click on the "Check in" button. You can also check in an instrument from the student detail page.

To view current students to whom the instrument is currently assigned, notes, or history of whom the instrument was previously assigned, go to the instrument detail page, and a history box shows all previous and current students to whom the instrument has been checked out. "Notes" will show any specific notes that have been made about the instrument. "History" will show the previous students to whom the instrument has been assigned as well as the check-in/check-out date.

Equipment

To add equipment, click on the arrow button from the schools list page (→) after the school's name for where the equipment will be added or is held.

On the left side, click on the "Equipment" menu item. Click the "+ New" button to add a new piece of equipment to the school. Enter the name and use the dropdown menu for the condition. These are the only two fields that are required. The name can be anything that the director wants to enter such as title of books or recordings i.e. "Solo Sounds for Flute - Accompaniment book", "US Marine Band Plays Sousa, Vol. 2", "Microphone 5" or anything else that the director wants to name the equipment. Then the director can enter the brand, model, serial number, and a specific district number (for fixed assets if your district does that) if those fields apply. Lastly, the director can enter an exact or estimated value of the equipment (without the dollar sign). Then, click on save. When the box closes, the new equipment's name will appear at the bottom of the list.
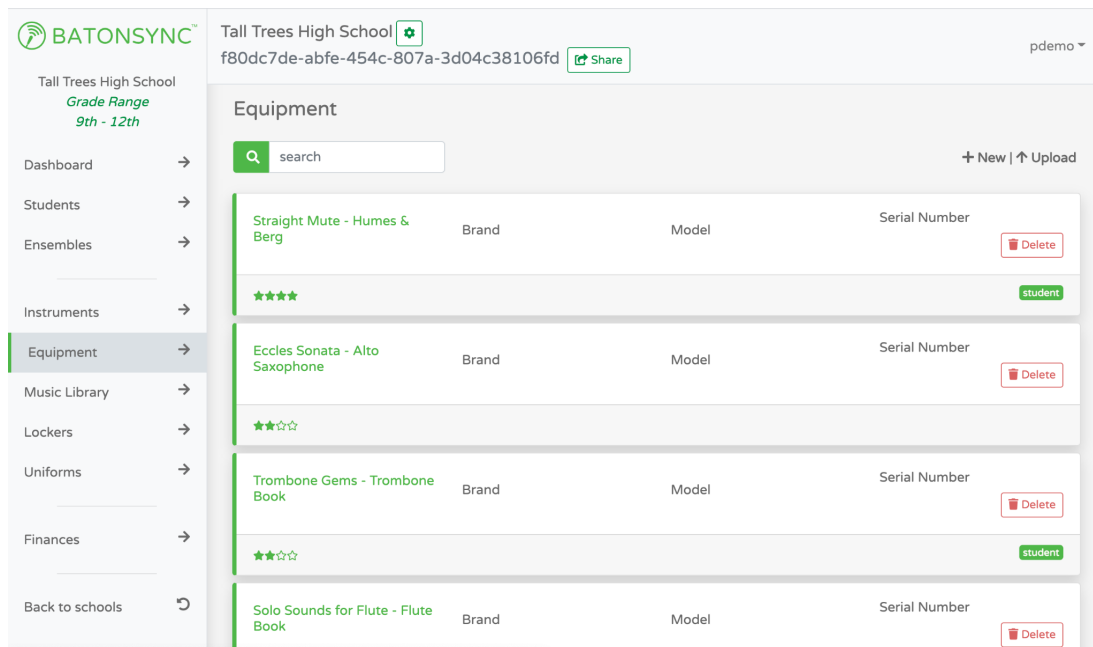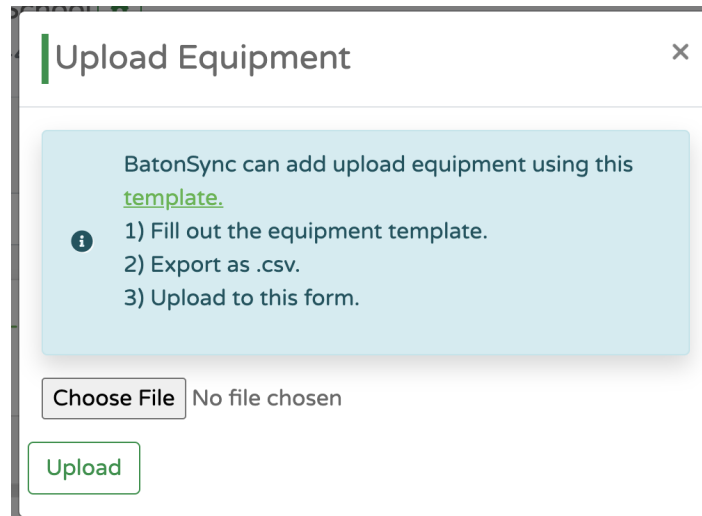
To edit equipment, click on the equipment name to navigate to the equipment detail page. Then click on the pencil icon to edit the equipment attributes including type, condition, brand, model, serial number, district number, and value.

To check out equipment to a student, click on the equipment type to navigate to the equipment detail page. In the equipment detail page, click the " ← Checkout" button next to the student checkout history box. Choose the student to whom you are assigning the equipment from the dropdown menu, or you can start typing the student's name to do a search. Then click on the "Save" button. When you refresh the equipment detail page, the display should now show that the equipment is on loan to the student who was just selected. Additionally, the equipment will now display under the equipment tab in the student detail page.

To add a note about specific equipment, navigate to the equipment detail page by clicking on the equipment name. Click on the "+" to make a note about the equipment in the notes section. Notes for equipment might include things like: "The mic in the brown case," "includes an accompaniment book," or anything else that the director might want to keep notes about the specific equipment.

Directors can also upload their current equipment spreadsheet using the Upload button on the equipment page. A box (pictured below) shows up with instructions.

Upload Equipment ✕

> ℹ BatonSync can add upload equipment using this template.
> 1) Fill out the equipment template.
> 2) Export as .csv.
> 3) Upload to this form.

Choose File   No file chosen

Upload

Click on the template link and the spreadsheet template will download. Simply put your own columns in the right places on the template. The only required fields for equipment are name and condition. Then export as CSV (.csv). This will be a choice from your File menu most likely. Save it as a CSV on your computer. Then click on "Choose File" in the box above on BatonSync, and choose the CSV file that you just created. Click upload. Your equipment will show up automatically in the equipment part of BatonSync with all relevant information present. Instructions are also on the template itself.

To check in equipment, the director can search for the brand, model, serial number, district number, or condition in the search box on the right, or scroll down to the particular equipment. Double check the numbers on equipment, such as district number or serial number, with the student. Click on the equipment type to navigate to the equipment detail page. Then simply click on the "Check in" button. You can also check in a piece of equipment from the student detail page. Now, the equipment will show up under "Previous Equipment" on the student detail page.

To view current students to whom the equipment is currently assigned, notes, or history of whom the equipment was previously assigned, open the equipment detail page. "Students" will show the director to whom the equipment is assigned. "Notes" will show any specific notes that have been made about the equipment. "History" will show the previous students to whom the equipment has been assigned as well as the check-in/check-out date and the condition.

Lockers

To add lockers to BatonSync for the first time, click on the arrow button from the schools list page (→) after the school's name for where the lockers will be added. On the left side, click "Lockers" from the menu. Click on the "+ New" button to add new lockers. Add the

locker number (which can also be letters or a mix of letters and numbers), the combination to the lock, and the serial number of the lock. Only the locker number is required. Lockers can really mean storage units, cubbies, slots, shelves, or whatever other language the director uses to describe where the students keep the "stuff."
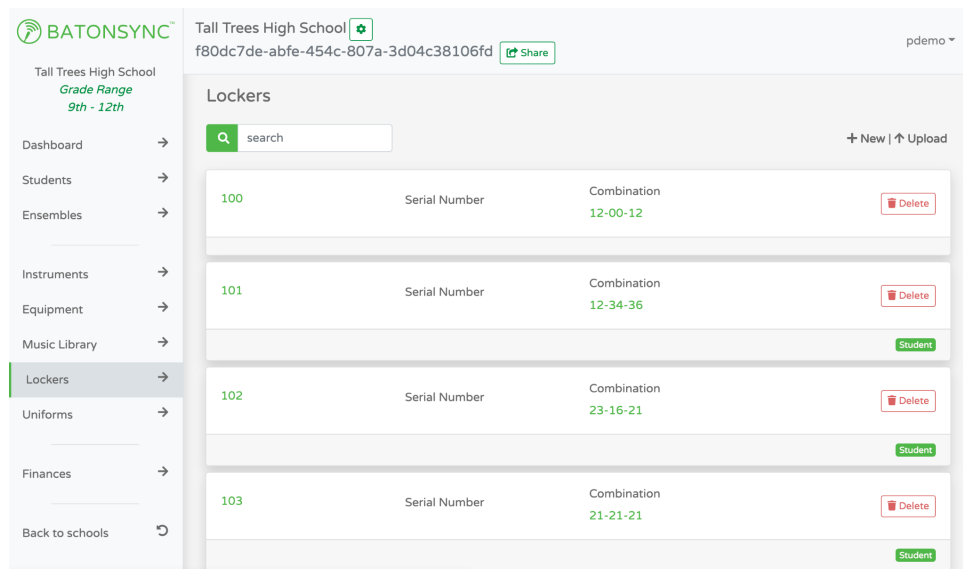
To edit a locker, click on the locker name/number to navigate to the locker detail page. Then click on the pencil icon to edit the locker attributes including number, combination, and serial number.
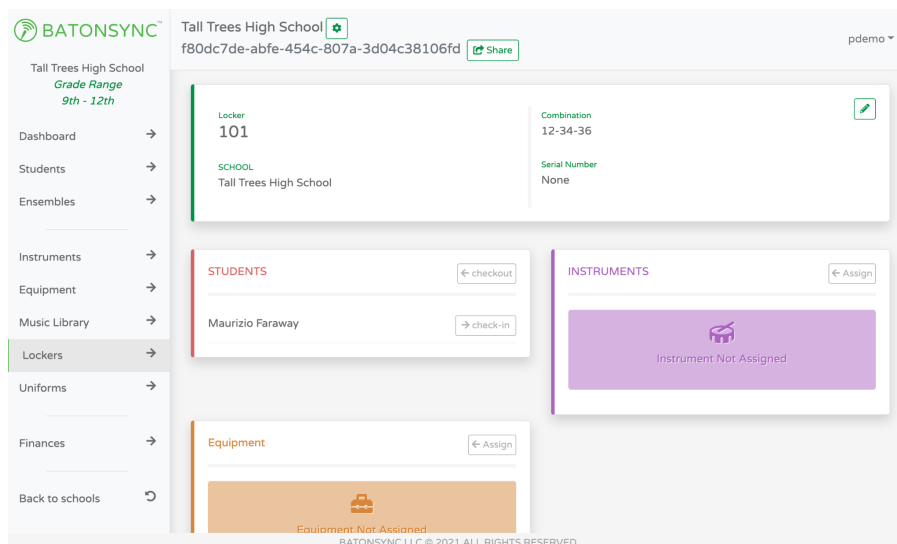
To check out a locker, click on click the " ← Checkout" button next to the student checkout history box. Choose the student to whom you are assigning the instrument from the dropdown menu, or you can start typing the student's name to do a search. Then click on the "Save" button. Directors can also assign equipment and instruments to specific lockers.

The Locker list will now show that locker number with a "student", "instrument" or "equipment" badge. To see the student(s) to whom the locker is assigned, click on the locker name to navigate to the locker detail page, and the director will be able to see the student name(s). Assigned lockers will also be visible from the student detail page. To check in a locker, click on the "Check In" button on the right.

Directors can also upload their current locker spreadsheet using the Upload button on the locker page. A box (pictured below) shows up with instructions.
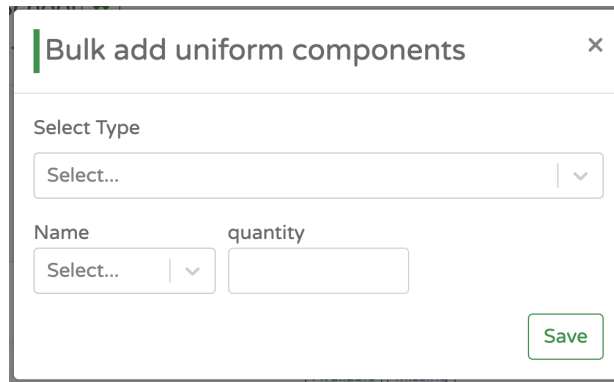

Click on the template link and the spreadsheet template will download. Simply put your own columns in the right places on the template. The only required field for lockers is locker number. Then export as CSV (.csv). This will be a choice from your File menu most likely. Save it as a CSV on your computer. Then click on "Choose File" in the box above on BatonSync, and choose the CSV file that you just created. Click upload. Your lockers will show up automatically in the lockers part of BatonSync with all relevant information present. Instructions are also on the template itself.

Uniforms

To add uniforms to BatonSync for the first time, click on the arrow button from the schools list page (→) after the school's name for where the uniforms will be added. On the left side, click the "Components" tab, You can choose to bulk add uniform components, or add single components. For bulk adding components, select the type (marching, concert, choir), and then select the name of the component. Enter the quantity of items, i.e. capes, that are in the inventory (the highest number only - so if I have 100 uniforms, I am going to put 100 in the quantity box), then click on save.
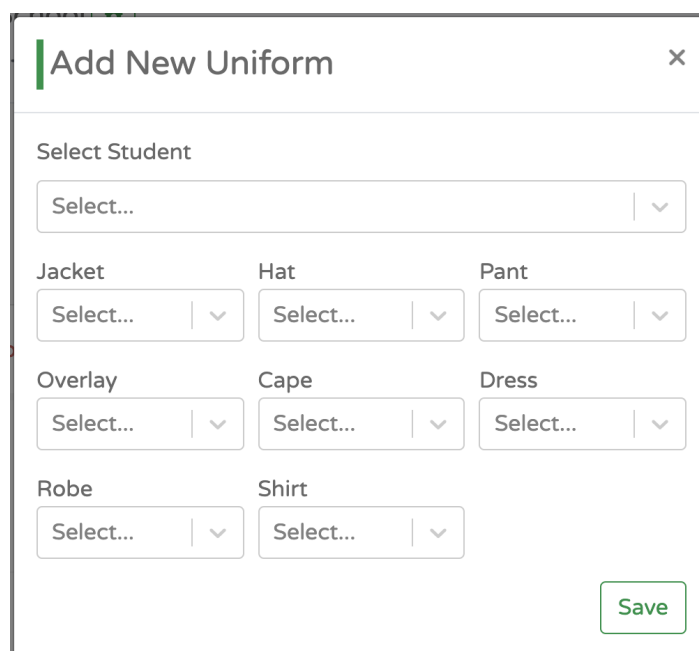
Bulk add uniform components ✕

Select Type

Select... ⌄

Name   quantity

Select... ⌄ [   ]

Save

When the box closes, you will see the individual components listed with a status of available and a trash can button if you want to delete only certain individual components. The director should complete these bulk uploads for each of the uniform components that exist in the inventory.

To check out a uniform to a student, click on the "Uniform" menu item on the left, then click on the "← Checkout" button. A box appears, and the director can simply type in the numbers of the uniform components to be assigned to a student. The director must also choose the student name from the dropdown menu boxes, or you can start typing the student's name to do a search. You can check out multiple uniform components at the same time. For example: You, the director, teach choir and band. You can check out a marching band uniform by choosing marching and the numbered components and you can also check out a robe. If you need to check out two different pants, you will have to go back and fill out the form again. Both styles will show up on the student's uniform history and the uniform list page.

Add New Uniform ✕

Select Student

Select... ⌄

Jacket   Hat   Pant

Select... ⌄   Select... ⌄   Select... ⌄

Overlay   Cape   Dress

Select... ⌄   Select... ⌄   Select... ⌄

Robe   Shirt

Select... ⌄   Select... ⌄

Save

Then click on the "Save" button. After the save, the director will be able to see what uniform is currently assigned to a student from the student's detail page. Additionally, the director can search uniforms by student names or numbers in the search box, and this action will return all matching elements. For example, if the director finds a pair of pants/bibbers after a football game, then the director can type the number into the uniform search box and immediately see the student to whom the pants are assigned.

If uniform components are not returned after a set period, or become unusable, the director can mark that uniform component as lost, and a badge with "missing" shows up on the uniform component list next to that specific component. Likewise, if a component is found (years) later, then the component can be marked as "found" and the missing label will disappear. Uniform components can also be deleted if they are too poorly damaged to be used, or lost forever.

To check in a uniform, the director can search for a student's name in the search box on the right, or scroll down to the particular student. Double check the numbers on the uniform with the student, then simply click on the "Check in" button. If a student does not turn in all of the uniform components assigned to them, you can select which components to check in. You can also "Check in all" for the responsible students who turn in everything. Now, the uniforms or uniform components will show up under "Previous Uniforms" on the student detail page and any components that are still assigned to the students will continue to show the current uniform components.

Ensembles

For ensembles to be added, click on the arrow button from the schools list page (→)
after the school's name for where the ensembles will be added.

Click on the "Ensembles" menu item on the left side. Click the "+ New" button to add a
new ensemble to the school. Type the name of the ensemble, then click the "Save"
button.

Add Ensemble   ✕

Ensemble Name*

[   ]

[Save]

* = Required Field

To edit an ensemble, click on the ensemble name to navigate to the ensemble detail page.
To edit the name of the ensemble, click on the pencil icon, edit the name, and then click
save.

To add students to the ensembles, click on the ensemble name to navigate to the
ensemble detail page. Click on the roster tab on the right side of the page. Click on the "+"
button to add students to the ensemble. The director can choose a student name from
the dropdown menu boxes, or the director can start typing the student's name to do a
"fuzzy search", which is usually much faster for finding names. You can select multiple
students to enroll in the ensemble at the same time. After saving, the student's name will
appear in the roster, alphabetical by last name. The director can easily un-enroll students
by clicking the trash can button on the right by each student's name.
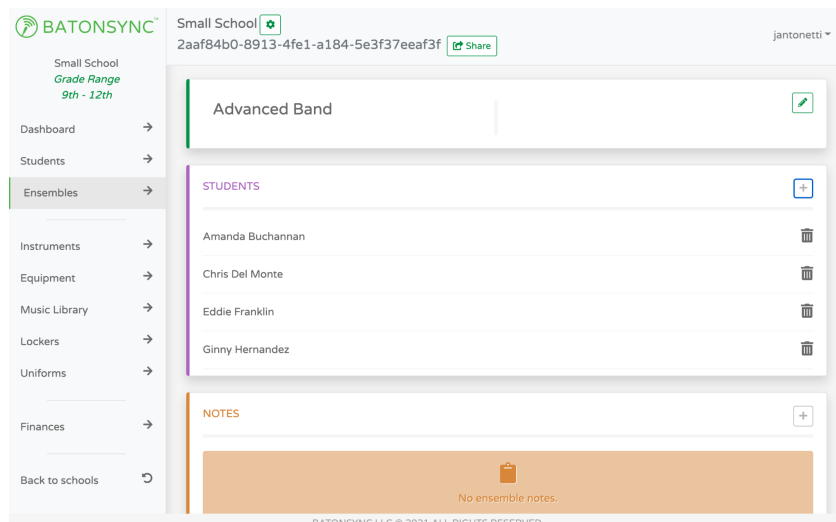
After students have been added, the director can click on the "Ensembles" tab on the left to return to the list of ensembles at a school.

Music Library

To music library selections, click on the arrow button from the schools list page (→) after the school's name for where the music library selections will be added.

On the left side, click on the "Music Library" menu item. Click the "+ New" button to add a new piece of music to the school's music library. For a successful addition to the music, only the title is required.

Use the dropdown menus for the various categories of music (that make it easier to search for later), and the difficulty level of music based on the common grading and difficulty levels of publishers. Composer, Arranger, Publisher, Genre, and Key can all be filled in (or not) by the director. The local holding number is so that if you need to track music in your district with a fixed asset number or barcode number, that you can also do that in BatonSync as well. You can also check the boxes for "PML" if the music is on your state's "Prescribed Music List" for contest, "Digital" if you hold the music electronically, "Hard Copy" if you hold the music physicallin in hard copy form, and/or "Out of print" if you own this music but you know that it is out of print. The badges for each of these will show up on the music library list on that specific piece of music.

Directors can also enter the purchase price (in dollars) of the piece of music and also choose the acquisition date. Knowing the purchase price helps with replacement costs, and knowing the acquisition date can help you to cull the library at a future date, if needed.

Directors can also upload their current music library spreadsheet using the "Upload" button on the Music Library page. A box (pictured below) shows up with instructions.

Click on the template link and the spreadsheet template will download. Simply put your own columns in the right places on the template. The only required field for the music library is title. Then export as CSV (.csv). This will be a choice from your File menu most likely. Save it as a CSV on your computer. Then click on "Choose File" in the box above on BatonSync, and choose the CSV file that you just created. Click upload. Your music library items will show up automatically in the music library part of BatonSync with all relevant information present. Instructions are also on the template itself.

Finances

For financial records to be added, click on the arrow button from the schools list page   (→) after the school's name for where the financial records will be added.

Click on the "Finances" menu item on the left side. The director should then see a financial overview page that will change as the director adds more financial information such as accounts names, total monies in all accounts, trip progress, fundraisers, and fee progress. This is a great snapshot of the finances of your program with visual representations of the data.

Click "Add New Account" and type the name of the account, then click the "Save" button. After an account is no longer needed or closed, you can deactivate an account from the account detail page.

Click to select the "Fundraisers" menu item on the right. Click "Add New Fundraiser" and type the title of the fundraiser, like "Spring 2016 Cookie Dough", then click the "Save" button. This will allow you to track which fundraising profits go to which accounts or are associated with certain payments in the payments section. After a fundraiser is completed, you can deactivate it from the fundraiser detail page.
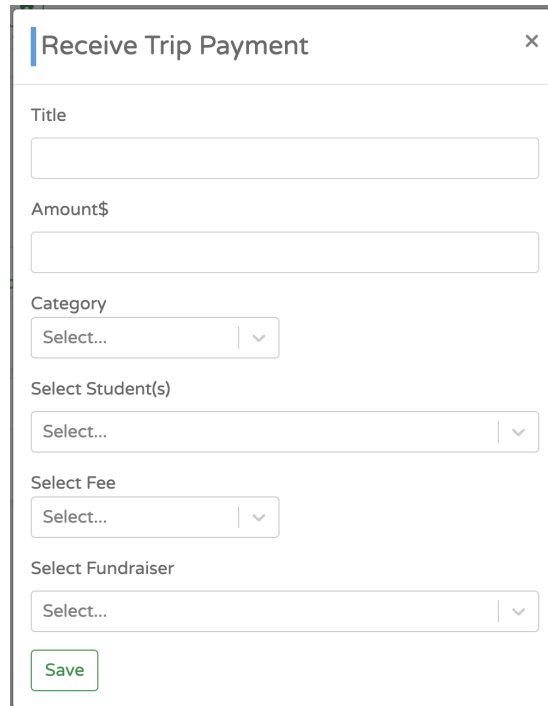
Click to select the "Fees" menu item. Click "Add New Fee" and type the title of the fee and the amount, then click the "Save" button. This allows you to assign a fee to every student, such as a band fee or fine arts fee. After you enter payments, you will be able to see a list of students who have paid and a list of students who have not paid the fee as well as a circle graph comparing the two groups of paid and unpaid. After a fee is completed, you can deactivate it from the fee detail page.

Select the "Trips" menu item on the right. Click "+ New Trip" and type the title of the trip, then click the "Save" button. The trips might be Disney Trip, Memphis Trip, or any other trip that you might have planned. After creating trips, you can select the trip on the left to see a more detailed overview of the trip details. You can track received trip payments from students, see transactions, and see a list of students who have made some sort of progress toward this trip.You can also track payments that you make out to vendors for the trip purposes from the trip account. After you enter payments, you will be able to see a bar graph depicting the total amount collected and paid on the accounts page. After a trip is completed, you can deactivate it from the trip detail page.

When you track receiving a trip payment, you can add a title to the payment, such as Payment #1, the amount for each student, the category of the payment, and then you can select multiple students who are making the same payment in the same amount. You can

also attach these payments to a fee or fundraiser (if you have already entered those items from the main account menu).

Receive Trip Payment ✕

Title

Amount$

Category
Select...

Select Student(s)
Select...

Select Fee
Select...

Select Fundraiser
Select...

Save

To track received payments, you will do that from the accounts with which the payments are associated such as band trip, activity account, transportation, or something else. There are several required fields including the title of the payment, the amount of the payment (enter without a dollar sign). The category, selected students, fee, and fundraiser fields are optional. When a payment is recorded, several relationships exist to display the data. The financial overview page is updated to display the information for the payments that are entered. Additionally, for each payment associated with a student, the financial information and payment history will also be available from the student detail page, which will be great for discussing finances with individual students and parents.

You can also track payments that you make out to vendors. This would be something like if you purchased sheet music with money from your activity account. If a payment transaction is tracked in the trip, the progress bar will not be affected as even though the money was collected and then paid out to a vendor, it is still stalked as part of the trip progress. It will still show up with a red subtraction sign in transactions. Payments made out to vendors in the activity account or transportation account, will subtract as expected and who in the transactions with a red subtraction sign as well.

Schools List

This is a home base to move between schools and all of the elements. At any time a director is in a sub area of any of the schools, the director can click on the "Back to schools" menu on the left to go to the schools level. This is a good way to change between schools very quickly.

Account Profile

For account personalization, click on your username at the top right of the page. This will take you to an account profile page. The user can change his or her first and last name, email address, and/or password. The date that the account was added is also displayed along with the status of the account, account type, billing period, billing method, and subscription end date.

If you forget your password, then you can click on the "forgot password" link from the login page, and an email will be sent to the email you registered with instructions to change your password. You cannot change your username at this time.

Contact Us

We have had a blast building the BatonSync application as a way to empower music educators to be more effective at their jobs of teaching students in music. Ultimately, we want to serve music educators so that teachers will have more time to focus on music and students and not spend as much time and resources on organizing, managing, assigning, and everything else that is not music.

We love your feedback because we always want to improve the experience for all directors. We look forward to hearing your ideas on what we can improve and what to create or add in the future. Let us know!

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Questions? Comments? Suggestions? Email support@batonsync.com

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