

Square Dance Tech — Moderator Manual

Covers the Moderator Dashboard.

1. Before You Start

Internet connection required

The software requires an internet connection. The databases are stored in the cloud, and it's the only way the system works. Throughout most of the United States, in almost every area, dancers can get a connection on their phones. The moderator may have to hot-spot their device.

Device requirements

Be advised that the moderator software was designed to run on a laptop, but it will run on a tablet or even a phone. When running on a tablet or phone, you will most likely lose the ability to display all of the dancers and their dance assignments. If you're with a larger group, say over 3 or 4 squares, odds are you're going to encounter people who absolutely will refuse to use their phone or will be unable to figure out the technology to do so. In that case, you're going to have to be able to display the dancer names — which the software can do, just not easily on a tablet or phone. With a laptop, it's just a matter of having a separate HDMI monitor.

Dancer technical literacy

Speaking of dancers being unable to figure out the technology, in real world tests we've absolutely encountered dancers who had never seen a QR code, don't know what one is, don't know how to scan it, don't know what a browser is or how to access it, or how to return to a browser once they close it. Dance leaders: be keenly aware of your dance floor and their level of technical sophistication.

2. Adding Dancers to the Floor

There are three ways a dancer gets onto the roster, and **each one defaults to a different starting status** — this is deliberate, not an inconsistency:

Path	Default status	Why
Dancer self-registers (scans QR code / uses the link)	Out	They may have registered from home hours before the event, or from across the room before finding their square. Registering isn't the same as being ready to dance.
Moderator manually adds them (Add Dancer(s) tab)	In	You're typing their name in because they're standing in front of you right now.
CSV import (bulk)	Out	Same reasoning as self-registration — a bulk import is usually a pre-registered list, not people who are already on the floor.

If dancers seem to be sitting out an entire first tip after check-in, this table is usually why — self-registered dancers need to mark themselves **In** once they're actually ready.

Manual Add Dancer notes

- The **PIN field comes first**, above the name — reflects how you'd naturally think through adding someone (verify their PIN, then their name).

- **Level** is a row of buttons (Student through C4), not a dropdown. Picking Dancer 1's level automatically sets Dancer 2's to match, since couples usually share a level — you can still click Dancer 2's level separately afterward if they're actually different.
- Choosing **Either** for Dancer 1's position disables the partner-name field entirely — Either is a solo-only position. To add a couple, at least the first dancer needs a fixed Boy/Girl position.

Duplicate names are blocked everywhere

No two dancers can register or be added under the exact same name in the same session — whether they're self-registering, being added manually, or imported via CSV. If "Bob" is already on the roster, a second "Bob" will be rejected with a message asking for a distinguishing last initial or number (e.g. "Bob B2"). This applies without exception, including CSV imports, which will stop and list every duplicate found in the file before importing anything.

3. Managing the Roster (Dancer Information Tab)

Position changes — the two hard blocks

Clicking a dancer's position badge behaves differently depending on their situation:

- **Solo dancer, not paired** → opens a direct picker (Boy / Girl / Either). Pick one, done.
- **Paired with another solo** → **blocked entirely**, with the message: *"Cannot change position while paired with another solo dancer. Unpair first if you need to change position."* This exists because pairing assigns compatible Boy/Girl roles between two people — changing one side's position independently could silently turn a valid pairing into an invalid Boy+Boy or Girl+Girl one. **Unpair first**, then change position freely.
- **Committed couple, both checked in** → **blocked entirely**, with the message: *"Cannot change position while both partners are checked in together. Mark one partner Out or Sit Out, or use Split, to change positions individually."* You can only change one partner's position independently once they're no longer both actively "in" together — either by marking one Out/Sit Out, or by using Split to formally separate them.

Level changes

Clicking a dancer's level badge opens a picker (Student through C4) — it's a direct choice, not a click-to-cycle.

Name changes

Clicking the pencil next to a name turns it into an editable field with a green checkmark (save) and red X (cancel). Renaming is subject to the same duplicate-name check as registration — you can't rename someone into a name that's already on the roster.

Filters

The roster can be filtered by mode (All / Available / Registered), level, position (Boy/Girl/Either), status (In/Out/Sit Out), and **Solo vs. Coupled** — all filters combine with each other (AND, not OR), and each button's label updates live to show how many dancers match given whatever else is currently selected. There's no separate "Boy Solo" button because you don't need one — turning on **Solo** and **Boy** together does exactly that.

Removing a dancer

Removal is permanent and confirmed with a prompt. If the dancer being removed was **paired**, their partner is automatically unpaired and reverted to their original position — not left with a dead "Unpair" button pointing at nothing. If they were **split** from a partner, that partner's split link is cleared too, and they become a permanent solo going forward — not left with a "Recouple" option pointing at someone who no longer exists.

Roster density (Compact View)

A per-device display preference, not tied to the event data — toggle it near the top of Dancer Information. **Compact** packs everything onto one line per dancer (better for a laptop with 100+ dancers). The default, roomier two-line layout is easier to read on a phone. Each device remembers its own preference; it isn't synced between your laptop and your phone.

4. Pairing & Splitting

Pairing two solo dancers

The **Pair...** button lets you match two solo dancers together for a tip. The logic behind who ends up Boy vs. Girl is worth understanding, since it can look arbitrary — because it is:

- Whichever dancer's **Pair...** button you click first becomes **Boy**.
- Whichever dancer you then select from the resulting list becomes **Girl**.
- If pairing two dancers who are **both Either**, one is arbitrarily assigned Boy and the other Girl — there's no meaningful logic behind which one gets which, it's purely based on click order.
- If one has a fixed position and the other is Either, the Either dancer is automatically assigned the opposite role.

This is deterministic (same click order always gives the same result) but not meaningful — if a pairing comes out the "wrong way" for two Eithers, there's no need to fix it in software; it sorts itself out on the floor.

Unpairing restores both dancers to whatever position they actually had before pairing (their real preference, not the temporarily-assigned Boy/Girl role).

Splitting a couple

Split is for couples who need to dance with different partners for a stretch of time — most commonly because one half is sitting out or stepping away, and the other wants to keep dancing with a specific person rather than being randomly paired. Class mentors ("angels") each pairing with a different student is one example, but it's just as often simpler than that: one partner sits out, the other wants to dance with someone specific. It is **not** meant for couples who simply aren't going to dance together at all for the rest of the event; if that's the real situation, they should register as separate solo dancers instead.

There is no way to guarantee a specific pairing without splitting first. If one half of a still-committed couple sits out or goes Out, the other can be offered a switch to Either — but that only makes them eligible for the *normal random rotation*, not a specific partner. Pairing only ever works on genuine solo records, and **dancer2** of a committed couple is not treated as one — there's no "Pair..." option available for them at all, no matter their position or their partner's status. To guarantee a specific pairing, **split the couple first** (creating a real, independent solo record), then pair that new solo record with whoever they actually want to dance with. This is a known, accepted limitation rather than an oversight — building a direct pairing path for **dancer2** would mean touching the core pairing engine for a need that Split-then-Pair already fully covers in two clicks instead of one.

Splitting creates two independent solo records, retaining each person's original Boy/Girl position. They can each be paired independently with different students.

PIN changes are blocked entirely while split. This is deliberate: if one half of a split couple changed their PIN independently, recoupling would have no correct way to decide which PIN survives — the safest fix is to not let the situation happen in the first place. Reunite first (Recouple), then change PINs if needed.

Recoupling

Merges a split couple back into one shared record.

A split couple leaving together

Either half of a split couple can log out. This is treated as the couple leaving the event. Both halves are marked Out, and if they were paired, they are automatically unpaired. Their paired partners revert to their default status and dance position. The split couple, when logging back in, remains split. They're free to re-pair with whoever's actually available the next time they're both back in. (Or they can recouple.)

A Known Limitation

At the Challenge level, an odd number of solo dancers may possibly mean a solo is not evenly paired, and — in a floor down to just one solo — that person may need to dance with a "phantom" (an imaginary 8th dancer) every single tip. There's no automatic software fix for this.

One trick that's been found to work is to add a Phantom Dancer to the dance floor. Then the solos are distributed as evenly as the couples.

Phantoms are legitimately recognized at the Challenge levels.

5. Generating a Tip

Warnings you may see before a tip generates

Generating a tip can trigger one of two confirmation warnings — both are "continue anyway?" prompts, not hard blocks, since sometimes the situation is unavoidable and you need to proceed regardless:

- **"This level will split up N couples"** — appears when the level you've picked would put one partner below the cutoff while the other qualifies, meaning a couple that's fully checked in would be forced to dance as a solo this tip. Lists exactly who's affected.
- **"Some solo dancers cannot be paired"** — appears only when a solo dancer has *zero* compatible partners available at all (e.g., a lone Boy with no Girls or Eithers on the floor) — not just an uneven ratio, which is normal and handled by the rotation itself. Suggests changing that dancer's position or splitting a couple to create a partner for them.

If there genuinely aren't enough available dancers to form even one square, tip generation is blocked outright with a clear message stating the minimum needed.

Sit-out fairness

The rotation isn't random each tip in isolation — it tracks who's actually danced recently and prioritizes accordingly:

- **Must Dance** (set manually per dancer) is the highest priority — guaranteed a spot if a square can be formed at all.
- Anyone who was **sat out by the algorithm last tip** (not by their own choice, not by a level exclusion) gets bumped to the front of the line this time.
- Everyone else rotates normally.

This means a dancer who was randomly sat out won't keep getting unlucky tip after tip — the system remembers and corrects for it. It only tracks sit-outs the *software* chose; marking yourself Out or Sit Out voluntarily doesn't count against (or for) you in this fairness tracking.

The lock timer

Once a tip is generated, the floor locks for a fixed window (90 seconds) before automatically unlocking — giving dancers time to see their assignment before anything can change again. A persistent lock bar stays visible above the tabs the whole time, showing the countdown, with an **Unlock Now** button if you need to override the wait. The lock only blocks dancers from changing their own status (In/Out/Sit Out) — level and position changes remain available throughout.

Undo Last Tip

Reverts the most recently generated tip and restores the exact state from before it — useful if a tip generated with an outcome you want to redo (e.g., you hadn't finished adjusting statuses first). Only one tip back; there's no multi-level undo.

6. Dancer Handout (PDF & Email)

The **Dancer Handout** tab generates a printable PDF or a copy-pasteable email, each with a real QR code (or friendly link, if one is set up for this event) and step-by-step instructions for logging in.

What's fixed vs. what you can edit

Step 1 — the actual QR code / link and the sentence telling someone to scan or type it — is **permanently fixed** in both documents and cannot be edited. Everything from step 2 onward is editable verbiage, shared conceptually between the PDF and email (though they can be told to diverge if you want).

Editing the text for this event

"Edit Text For PDF" / "Edit Text For Email" let you customize the wording for this event. If you haven't customized it, standard wording is used automatically. "Revert to Factory Settings" clears any customization you've made and goes back to that standard wording.

The sync prompt

Saving either the PDF or Email text asks: **Save Both Formats / Save Only This Format / Cancel** — since the two documents usually carry the same wording but don't have to. Choosing "Both" writes the same text to both; "Only This Format" leaves the other one exactly as it was.

Simple markup for formatting

The verbiage text box supports a few lightweight conventions so a single text field can still produce headings, numbered steps, and bullets:

- **# Heading text** → a bold heading
- **2. some text** → continues the numbered list (start from 2, since step 1 is fixed)
- **- some text** → a bullet point
- Blank lines separate sections and are preserved in the final output — spacing you see while editing carries through to the generated PDF and email.

CSV Import

For bulk-adding dancers from a spreadsheet. Same duplicate-name check as everywhere else — the whole import stops and lists every duplicate found before anything is written, rather than importing partially. PINs can be left blank in the CSV and will be auto-assigned. Importing more than ~24 dancers (roughly 3 squares) triggers a gentle suggestion to consider the printed handout with self-registration instead, since made-up PINs get hard to hand out one-on-one at that size.

Since CSV-imported dancers default to **Out** (same reasoning as self-registration — they may not physically be present yet), there's a one-click **"mark all as active"** fix-up tool for the common case where you've imported a list of people who *are* actually already on the floor.

7. Deliberate Limitations (Things That Won't Be "Fixed")

A few things behave the way they do on purpose, not because they're unfinished:

- **No default gender inference for "Either."** If someone picks Either, the app treats that as a genuine "I'll dance whichever role" — it will not try to guess someone's likely gender and pair accordingly. If a group wants a specific pairing outcome, the fix is picking Boy or Girl at registration, not software guessing on their behalf.
- **No default dance level per event.** Every registration path defaults to Plus regardless of what level the event actually is. Considered and deliberately skipped — the cost of building it (and the resulting UI complexity of hiding "irrelevant" levels) wasn't worth it for what amounts to a minor, easily-corrected nuisance.
- **No "Add to Home Screen" shortcut.** Tested and removed — this only reliably works on Chrome specifically, on Android specifically, and even then depends on things outside this app's control. Given roughly half of any real crowd is on iPhones, and Android itself is split across several browsers, a QR code that works identically on every phone regardless of browser was judged more reliable for this audience.