
Ontario Woodlot Association

Membership Management System (MMS)

User Manual

MMS User Manual Table of Contents (v3)

This user manual provides a general overview of the Association's online Membership Management System.

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Membership Management System User Manual

The new Membership Management System (MMS) will provide each of the Association's regional chapters access to "live" information for their local members. The MMS will provide chapters with contact information for each member; track new members; allow the chapter to update a member's contact information; print membership lists and mailing labels; and download a CSV file to use in other software applications.

The membership data is stored on a central server and will be available online only to authorized users. No special software is required for your computer. The only requirement is having access to the Internet. There will be a limit of two authorized user per chapter.

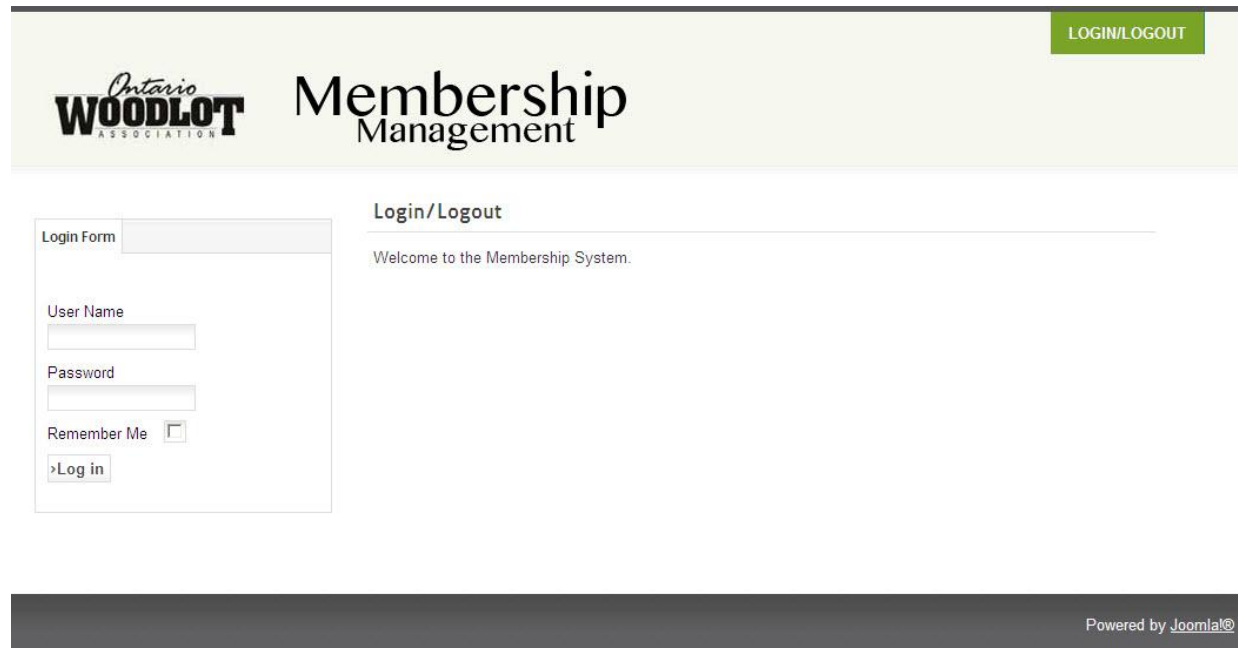
Privacy policy – the OWA has a policy to protect the privacy of our members. We do not sell, trade or share our membership list. Chapter representatives who have access to membership information have a responsibility be familiar with the Association's privacy policy and to safeguard the privacy of our members. Membership information is only to be used for the purposes as identified in Association's privacy policy. A copy of the privacy policy is available online at <http://www.ont-woodlot-assoc.org/privacy.html>.

The MMS is accessible at <http://www.owamembership.org/> (a link is located at the bottom of the home page of the OWA website)

The following is a brief overview of the membership system. Should you have any questions about the MMS please contact the OWA office at 613-257-0110 ext. 221.

1. User names and Password

For security purposes all user names and passwords will be issued by the OWA office. If you forgot your user name or password e-mail the OWA office and we will retrieve the information and send it to you.



The screenshot shows the login interface for the Membership Management System. At the top right, there is a green button labeled "LOGIN/LOGOUT". The main header features the "Ontario WOODLOT ASSOCIATION" logo on the left and the text "Membership Management" in a large, bold font. Below the header, the page is titled "Login/Logout" and includes a welcome message: "Welcome to the Membership System." On the left side, there is a "Login Form" box containing fields for "User Name" and "Password", a "Remember Me" checkbox, and a ">Log in" button.

2. Features of the Membership System

Live information – membership information is available on-line and is provided “live”. As new information is entered, or existing information is edited, authorized users with access to the MMS will be able to view the new/edited information.

Membership status – the MMS provides the membership status of each member (i.e., new, current, or expired). This feature will allow chapters an easy way to check for new or expired memberships. Refer to the section on Membership Status Categories for more information.

Editing and updating – users will be able to update member’s contact information (e.g., mailing address, telephone, e-mail, etc.).

Printing lists – the system will generate membership lists and prepare address labels using a selection of pre-formatted formats (e.g., Avery labels) that can be printed by the user.

Create PDF files – the system will allow the user to generate a PDF file of your membership reports.

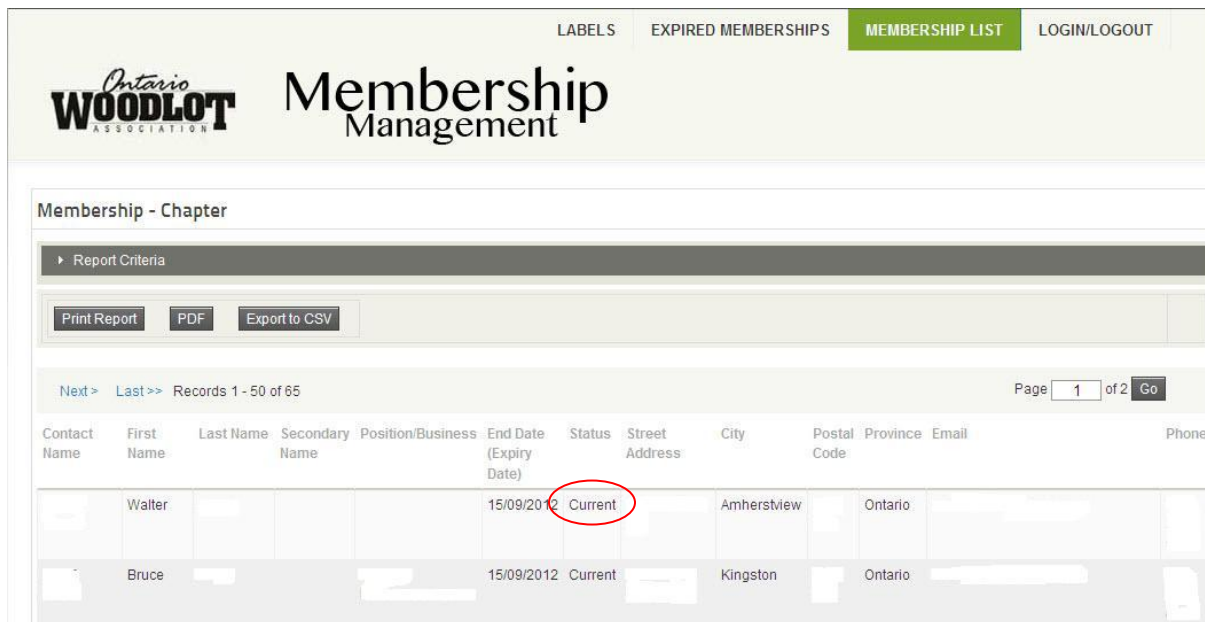
Data download – a CSV file of membership contact information can be downloaded allowing the user to import the information into other software applications (i.e., Microsoft Word for letters, envelopes, etc.).

Search/sorts – the MMS allows the user to do a search of their chapter membership.

3. Membership Status Categories

In addition to the contact information on each member their membership status is also listed under the “Status” column. There are 4 membership status categories:

- New – listed for 60 days of the date of joining, then the status will change to “current”;
- Current – listed until September 15th of the membership expiry year;
- Grace – listed for 30 days after the membership expiry date; and
- Expired – 30+ days after the membership expiry date. Expired memberships will be removed from the membership list on March 31st.

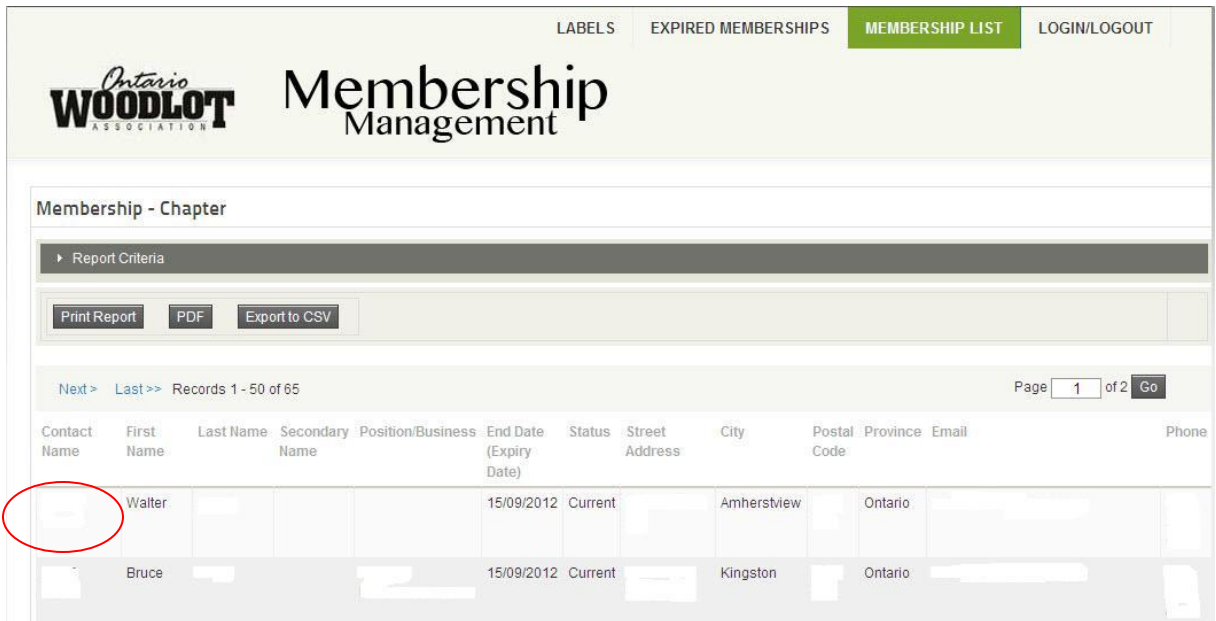


The screenshot displays the 'Membership Management' interface. At the top, there are navigation tabs: 'LABELS', 'EXPIRED MEMBERSHIPS', 'MEMBERSHIP LIST' (which is highlighted), and 'LOGIN/LOGOUT'. The main header includes the 'Ontario WOODLOT ASSOCIATION' logo and the text 'Membership Management'. Below this, there is a section titled 'Membership - Chapter' with a 'Report Criteria' dropdown menu. Action buttons for 'Print Report', 'PDF', and 'Export to CSV' are visible. A pagination bar shows 'Records 1 - 50 of 65' and 'Page 1 of 2'. The main data table has the following columns: Contact Name, First Name, Last Name, Secondary Name, Position/Business, End Date (Expiry Date), Status, Street Address, City, Postal Code, Province, Email, and Phone. Two rows are shown: one for 'Walter' with an end date of '15/09/2012' and a status of 'Current' (circled in red), and another for 'Bruce' with an end date of '15/09/2012' and a status of 'Current'.

Contact Name	First Name	Last Name	Secondary Name	Position/Business	End Date (Expiry Date)	Status	Street Address	City	Postal Code	Province	Email	Phone
	Walter				15/09/2012	Current		Amherstview		Ontario		
	Bruce				15/09/2012	Current		Kingston		Ontario		

4. Editing Contact Information

Step 1 – to edit the contact information of a member click on the individual’s name highlighted in blue text under the “Contact Name” column from the “Membership List”.



Labels: EXPIRED MEMBERSHIPS **MEMBERSHIP LIST** LOGIN/LOGOUT

Ontario **WOODLOT** ASSOCIATION **Membership Management**

Membership - Chapter

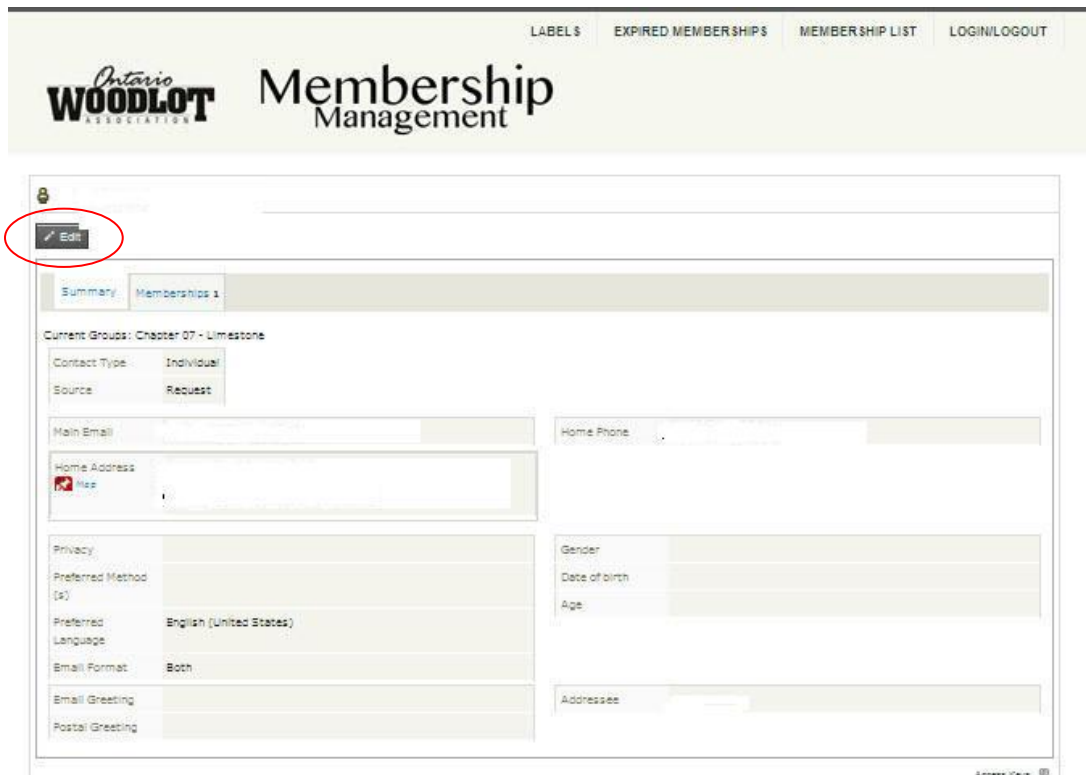
Report Criteria

Print Report PDF Export to CSV

Next > Last >> Records 1 - 50 of 65 Page 1 of 2 Go

Contact Name	First Name	Last Name	Secondary Name	Position/Business	End Date (Expiry Date)	Status	Street Address	City	Postal Code	Province	Email	Phone
Walter					15/09/2012	Current		Amherstview		Ontario		
Bruce					15/09/2012	Current		Kingston		Ontario		

Selecting the member’s name listed under the “Contact Name” will open up the “Summary” page that will provide a summary of the members contact information (i.e., name, e-mail, mailing address and telephone number). Note – we do not collect personal information such as age, gender, etc.



Labels: EXPIRED MEMBERSHIPS **MEMBERSHIP LIST** LOGIN/LOGOUT

Ontario **WOODLOT** ASSOCIATION **Membership Management**

Summary Memberships

Current Groups: Chapter 07 - Limestone

Contact Type: Individual

Source: Request

Main Email: [Text Field]

Home Address: [Text Field]

Home Phone: [Text Field]

Privacy: [Text Field]

Preferred Method (s): [Text Field]

Preferred Language: English (United States)

Email Format: Both

Email Greeting: [Text Field]

Postal Greeting: [Text Field]

Gender: [Text Field]

Date of birth: [Text Field]

Age: [Text Field]

Addressee: [Text Field]

Access Keys

Step 3 – to access and edit the member’s contact information select the “Edit” icon. By selecting the “Edit” icon the “Contact Details” page opens. From here you can edit the member’s primary contact information (e.g., name, business, telephone, mailing address and e-mail).

The screenshot displays the 'Contact Details' and 'Address' sections of the Membership Management System. At the top, there are navigation links: LABELS, EXPIRED MEMBERSHIPS, MEMBERSHIP LIST, and LOGIN/LOGOUT. The main header features the Ontario WOODLOT ASSOCIATION logo and the text 'Membership Management'. Below this, the member's name 'Walter' is shown. The 'Contact Details' section includes fields for Prefix, First Name, Last Name, Business, and Secondary Name. It also has checkboxes for 'On Hold?' and 'Bulk Mailings?'. The 'Address' section includes a 'Share Address With' checkbox, fields for Street Address, Add'l Address 1, Add'l Address 2, City, Zip / Postal Code, Country (set to Canada), and State/Province (set to Ontario). There are 'Save' and 'Cancel' buttons at the bottom of both sections.

Step 4 – press the “Save” icon to save any changes or “Cancel” to exit the “Contact Details” page.

Important Notes

- The “Secondary Name” is recorded all in one data field;
- For a business who do not list a contact name, the name of the business must be listed in both “Secondary” and “Business” data fields;
- Do not edit the “On Hold” or “Bulk Mailing” features;
- The MMS system records the author and date of any changes made to the member’s information.

5. Printing Reports

To print a membership list from the MMS follow these three steps or use the PDF file feature (see page 8):

Step 1 – select the “Print Report” icon on the “Membership List” page.

Ontario **WOODLOT** ASSOCIATION

Membership Management

Membership - Chapter

Report Criteria

Print Report PDF Export to CSV

Next > Last >> Records 1 - 50 of 65 Page 1 of 2 Go

Contact Name	First Name	Last Name	Secondary Name	Position/Business	End Date (Expiry Date)	Status	Street Address	City	Postal Code	Province	Email	Phone
	Walter				15/09/2012	Current		Amherstview		Ontario		
	Bruce				15/09/2012	Current		Kingston		Ontario		

Selecting “Print Report” opens to the CivCRM Report titled “Membership Detailed Report” in your Internet browser. See below.

CivCRM Report - Windows Internet Explorer

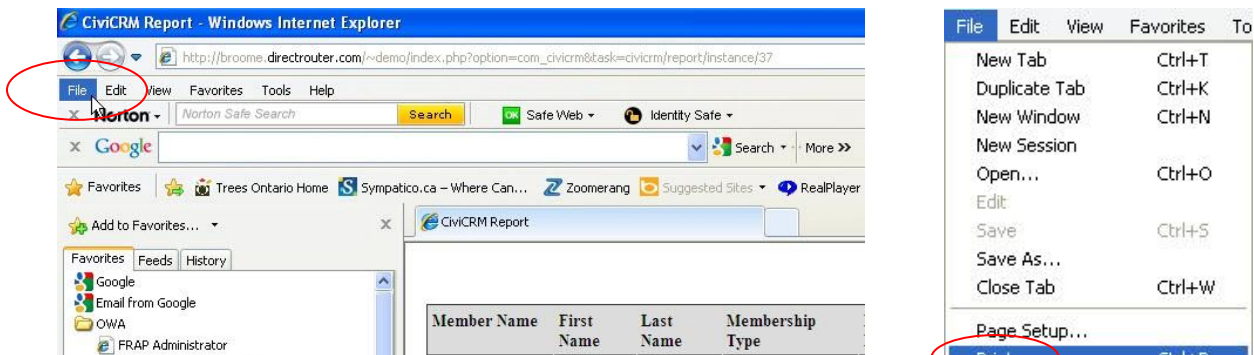
http://broomer.directrouter.com/~demo/index.php?option=com_civicrm&task=civicrm/report/instance/34&Itemid=171

Membership Detail Report

08/02/2012 12:11 PM

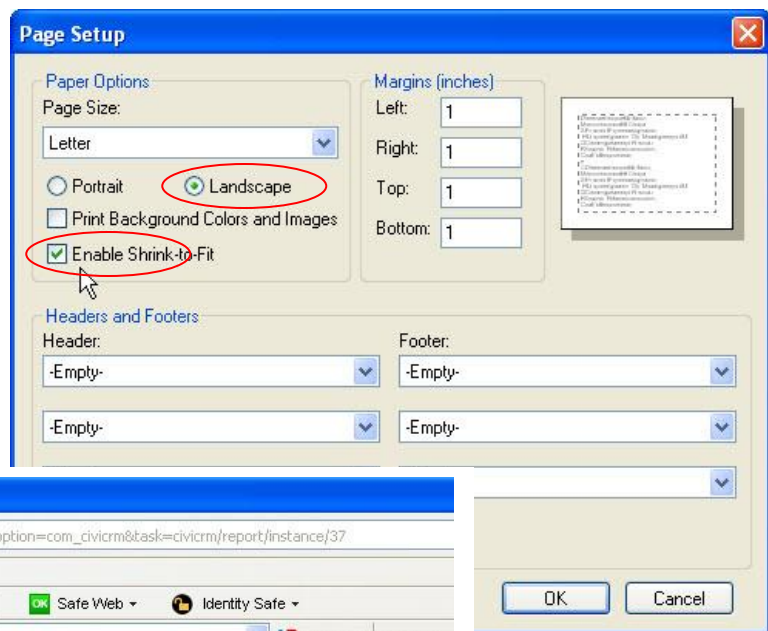
Contact Name	First Name	Last Name	Secondary Name	Position/Business	End Date (Expiry Date)	Status	Street Address	City	Postal Code	Province	Email	Phone
	Walter				15/09/2012	Current		Amherstview		Ontario		
	Bruce				15/09/2012	Current		Kingston		Ontario		
	Richard				15/09/2011	Expired		Kingston		Ontario		
					15/09/2012	Current		Harrowsmith		Ontario		
	Robert				15/09/2011	Expired		Kingston		Ontario		

Step 2 – select the “File” tab in the upper left corner of your Internet browser to open the drop down menu. From the drop down menu select the “Print” icon (see illustration on the right).

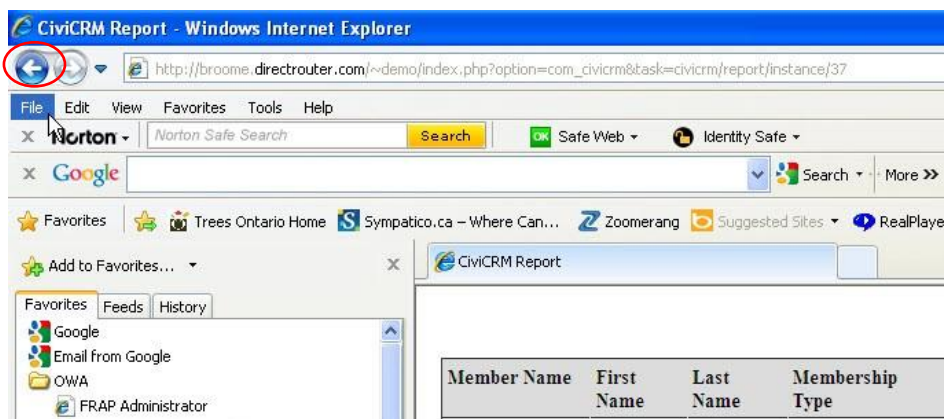


Tip – before printing you should set your page setup to “landscape” and “shrink to fit”. This can be easily done by selecting the “Page Setup” command (located above the “Print” command in the drop down menu) and selecting the appropriate check box. See below.

Step 3 – select “Print”.



Step 4 – to return to the MMS and the “Membership List” page use the back arrow located in the upper left hand corner of your Internet browser. See below.



6. Creating PDF Files

The MMS allows the user to create PDF files that can be printed, saved/stored and distributed to other chapter board members via e-mail.

Step 1 – select the “PDF” icon.

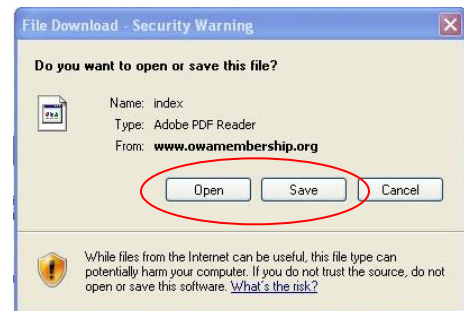
The screenshot shows the 'Membership Management' interface with the 'MEMBERSHIP LIST' tab selected. Below the navigation tabs, there is a 'Report Criteria' section with three buttons: 'Print Report', 'PDF' (circled in red), and 'Export to CSV'. Below the buttons, there is a pagination control showing 'Records 1 - 50 of 65' and 'Page 1 of 2'. A table of members is displayed below, with columns for Contact Name, First Name, Last Name, Secondary Name, Position/Business, End Date (Expiry Date), Status, Street Address, City, Postal Code, Province, Email, and Phone.

Contact Name	First Name	Last Name	Secondary Name	Position/Business	End Date (Expiry Date)	Status	Street Address	City	Postal Code	Province	Email	Phone
	Walter				15/09/2012	Current		Amherstview		Ontario		
	Bruce				15/09/2012	Current		Kingston		Ontario		

Step 2 – by selecting the “PDF” icon the “File Download” window will open. Select “open” to open the file on your screen or “save” on your hard drive.

Step 3 – to save or print the PDF file elect the appropriate icon in the upper left hand corner of the PDF window.

Step 4 – to return to the MMS and the “Membership List” page use the back arrow located in the upper left hand corner of your Internet browser.



The screenshot shows a web browser displaying the 'Membership Detail Report' page. The report table has columns for Contact Name, First Name, Last Name, Secondary Name, Position/Business, End Date (Expiry Date), Status, Street Address, City, Postal Code, Province, Email, and Phone. The data rows are:

Contact Name	First Name	Last Name	Secondary Name	Position/Business	End Date (Expiry Date)	Status	Street Address	City	Postal Code	Province	Email	Phone
	Walter				15-09-2012	Current		Amherstview		Ontario	walter_hilary@cogeco.ca	
	Bruce				15-09-2012	Current		Kingston		Ontario	bruce.antiff@gmail.com	
	Richard				15-09-2011	Expired		Kingston		Ontario		
	R.A.				15-09-2012	Current		Harrowsmith		Ontario		
	Robert				15-09-2011	Expired		Kingston		Ontario		

7. Search & Sorts

The MMS allows the user to do queries on the chapter membership data.

Step 1 – select the “Report Criteria” icon.

The screenshot shows the 'Membership Management' interface. At the top, there are navigation tabs: 'LABELS', 'EXPIRED MEMBERSHIPS', 'MEMBERSHIP LIST' (highlighted in green), and 'LOGIN/LOGOUT'. The main header includes the 'Ontario WOODLOT ASSOCIATION' logo and the text 'Membership Management'. Below the header, the page title is 'Membership - Chapter'. A dark grey bar contains a 'Report Criteria' icon, which is circled in red. Below this bar are buttons for 'Print Report', 'PDF', and 'Export to CSV'. A pagination bar shows 'Next >', 'Last >>', 'Records 1 - 50 of 65', 'Page 1 of 2', and a 'Go' button. A table lists members with columns: Contact Name, First Name, Last Name, Secondary Name, Position/Business, End Date (Expiry Date), Status, Street Address, City, Postal Code, Province, Email, and Phone. Two rows are visible: one for 'Walter' and one for 'Bruce', both with an end date of 15/09/2012 and status of 'Current'.

Step 2 – selecting the “Report Criteria” icon opens a new window with a series of check boxes and filters. This features allows you to do searches (i.e., find a member) or other sorts that can be viewed and/or printed by selecting the “Preview Report” icon.

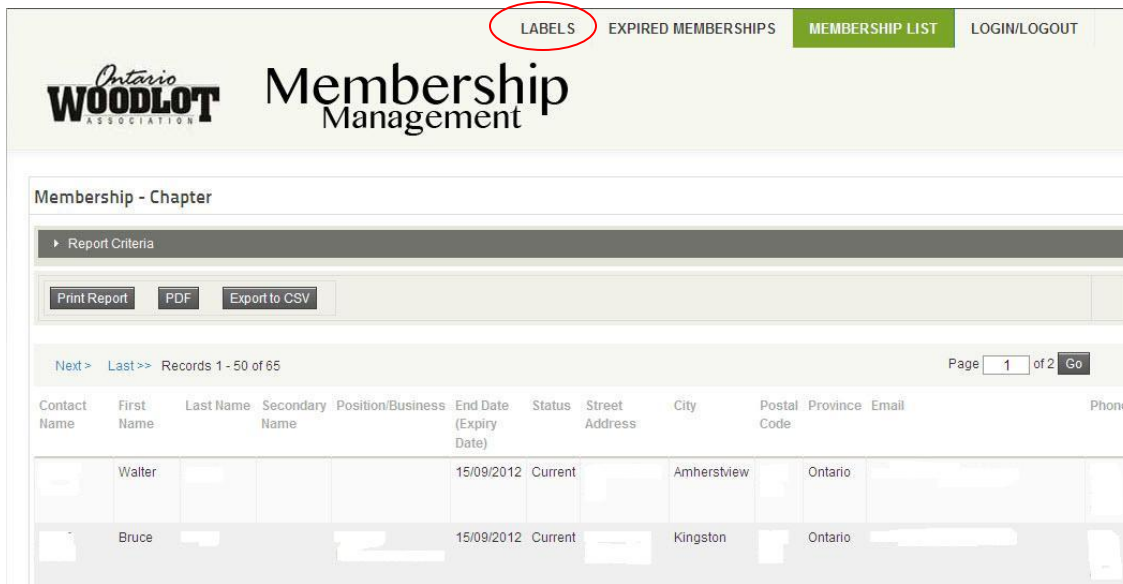
The screenshot shows the 'Report Criteria' configuration window. At the top, there are navigation tabs: 'LABELS', 'EXPIRED MEMBERSHIPS', 'MEMBERSHIP LIST' (highlighted in green), and 'LOGIN/LOGOUT'. The main header includes the 'Ontario WOODLOT ASSOCIATION' logo and the text 'Membership Management'. Below the header, the page title is 'Membership - Chapter'. A dark grey bar contains a 'Report Criteria' icon, which is circled in red. Below this bar are buttons for 'Print Report', 'PDF', and 'Export to CSV'. A pagination bar shows 'Next >', 'Last >>', 'Records 1 - 50 of 65', 'Page 1 of 2', and a 'Go' button. The 'Display Columns' section has a grid of checkboxes for various fields: Contact Name, First Name, Last Name, Secondary Name, Position/Business, Street Address, City, Postal Code, Province, Country, Email, Phone, Start Date (Last Paid), End Date (Expiry Date), Source, and Status. The 'Set Filters' section has a table with columns for field name, operator, and value. The 'Preview Report' button is circled in red.

Field	Operator	Value
Contact Name	Contains	
Secondary Name	Contains	
Position/Business	Contains	
Membership Expiration Date	Choose Date Range	From: [calendar icon] To: [calendar icon]

8. Creating Labels

The MMS will generate a variety of different size mailing labels using standard Avery label formats.

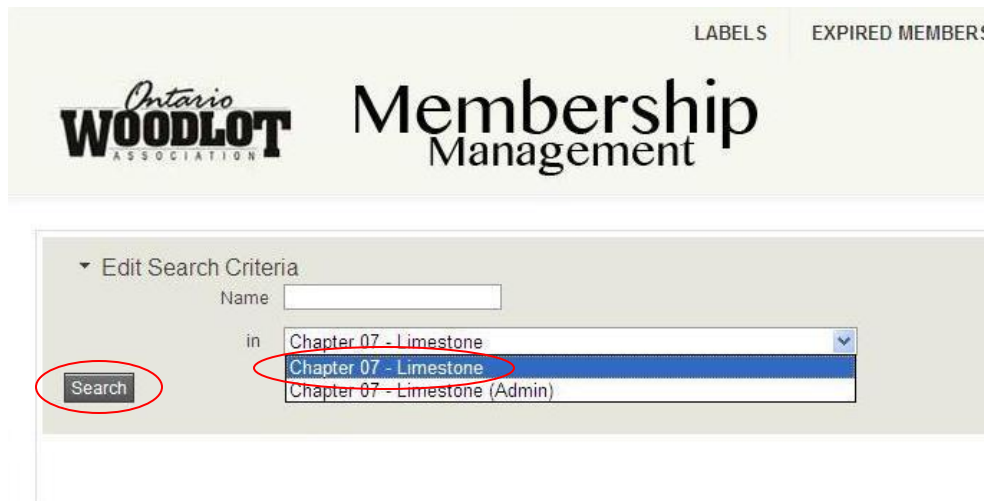
Step 1 – from the menu bar at the top of the page select the “Labels” icon.



The screenshot shows the top navigation bar of the Membership Management System. The 'LABELS' menu item is circled in red. Below the navigation bar, the 'Membership - Chapter' section is visible, including a 'Report Criteria' dropdown, 'Print Report', 'PDF', and 'Export to CSV' buttons, and a table of member records.

Contact Name	First Name	Last Name	Secondary Name	Position/Business	End Date (Expiry Date)	Status	Street Address	City	Postal Code	Province	Email	Phone
	Walter				15/09/2012	Current		Amherstview		Ontario		
	Bruce				15/09/2012	Current		Kingston		Ontario		

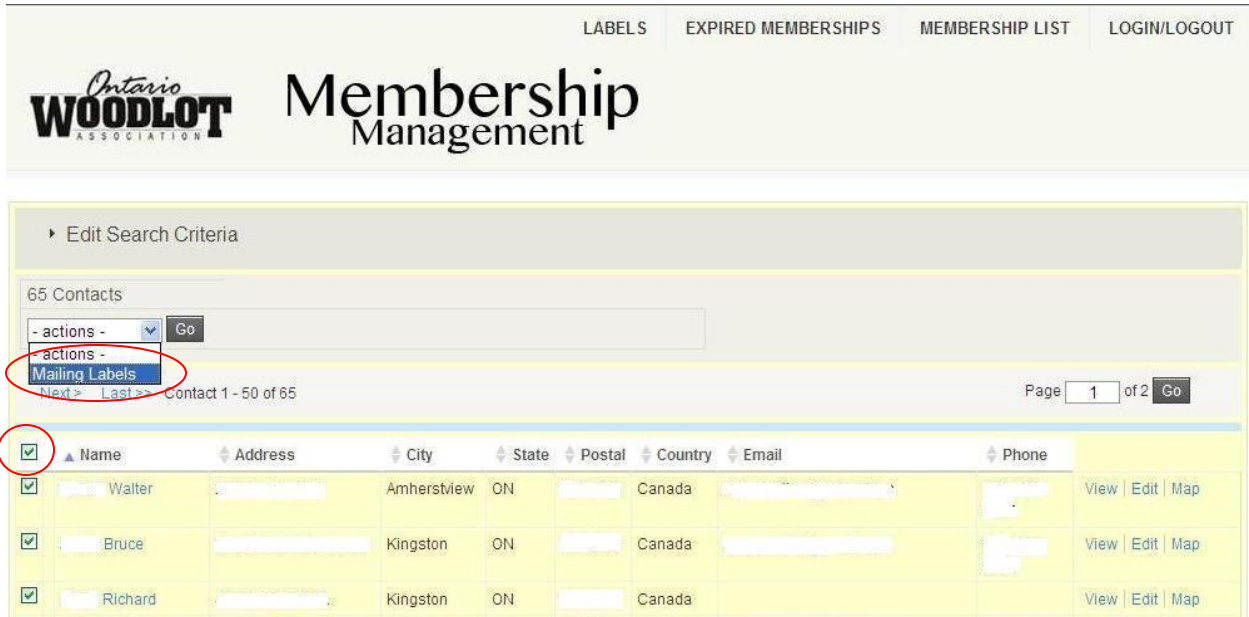
Step 2 – selecting the “Labels” icon opens into a new window to the “Edit Search Criteria” screen. From the drop down list select the name of your chapter (e.g., “Chapter 07 – Limestone”) and then press “Search”.



The screenshot shows the 'Edit Search Criteria' screen. The 'Search' button is circled in red. A dropdown menu is open, showing 'Chapter 07 - Limestone' selected, which is also circled in red. Other options in the dropdown include 'Chapter 07 - Limestone (Admin)'.

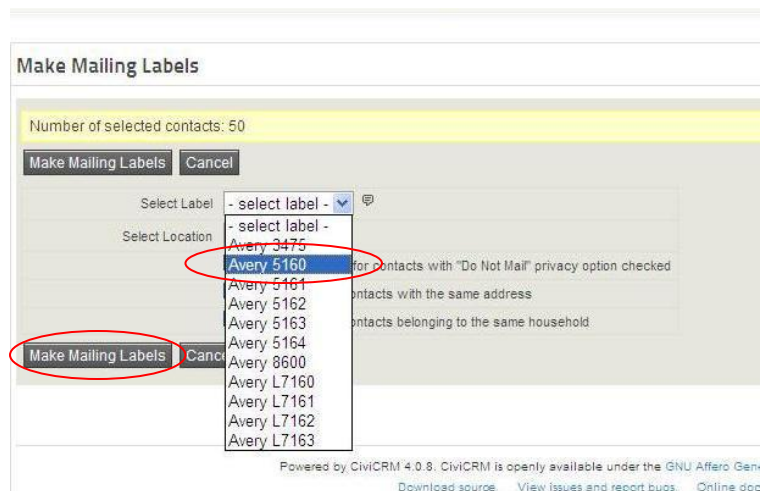
Step 3 – by selecting the “Search” icon a list of your chapter members will appear. Select the “tick” box on the top header (to the left of “Name”) to activate the check list for all members.

Step 4 – from the drop down list select “Mailing Labels” then select “Go”



Step 5 – selecting the “Go” icon opens the “Making Mailing Label” window. From the drop down box select the appropriate size of labels you wish to print. The MMS uses standard formatting from Avery to create labels.

Step 6 – select “Making Mailing Labels”. This



Step 7 – selecting “Making Mailing Labels” opens the “File Download” screen for a PDF file. Select either “Open” or “Save” to create a PDF file with the mailing label information sized to the label type selected.

