

# American Legion Auxiliary

# Management Information System (ALA MIS)

Unit Training Manual

Updated: February 1, 2017

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### **OVERVIEW**

The American Legion Auxiliary Management Information System (ALA MIS) is used by units and departments to manage members, units, departments and leadership information. Units are only allowed to designate up to two users for login access. This cost is \$10 per login. This is collected through the department and transmitted to the NHQ. The department headquarters authorizes who has access. Units must contact their department with the name of the member who should have access to ALA MIS along with the member's email address, member ID number, and phone number for the person at the unit who will be using the account.

Units can stay informed of important reminders from National Headquarters by viewing our announcements on ALA MIS. Units are also able to make updates, perform searches, and view unit reports.

### Make Updates

- Add new members
- Update member information (name, address, phone number, email address, birthday, marital status)
- Update Auxiliary magazine preference (mail, online, or no magazine)
- Update solicitation preference
- Request to have no mail/phone calls
- Add unit leadership positions

### Perform Searches

- See if dues have been applied to a member in the unit
- View a member's join date
- View a member's membership activity
- Search for members in the unit
- Filter and view only expired, junior, or adult members
- View a member's continuous years of membership
- View a member's member ID number
- View a member's paid through date
- See if a member is in a special category such as Paid Up For Life (PUFL) member or Honorary Life member (HLM)

### View Reports

- View Unit Reports to export into Excel, Word, or as a PDF document
- Use Excel exports to do mail merges if the unit needs to send letters, emails, or make labels for members
- Use Membership Roster to view all members in their unit
- Use Leadership Roster to view all leaders in their unit
- View the members who have paid dues report
- View the members who have not paid dues report

### **ACCESSING ALA MIS**

### Step 1: URL (website address)

To access the ALA MIS, open Mozilla Firefox or Internet Explorer, enter as the URL: <u>https://members.legion-aux.org</u>. The ALA MIS Login Screen should appear. We do not recommend using Chrome, as it can hide some information. This is where you type or paste the URL. If you do

not see this navigation toolbar, hit CTRL+L.

American Legion Auxiliary - × +						-	-		×
+ i https://members.legion-aux.org/	G	Q Search		ជ	Ê	+	Â	◙	≡
🙆 Most Visited 🧶 Getting Started									
									^
American Legion Auxiliary									
Login			Sign In						
			Create an Account						
			Username:	_					
			Password:						
			Remember	me					
			Sign In						
			Trouble logging o	<u>n?</u>					
									~

Bookmark this page from Firefox by hitting **Ctrl+D**. Next time you need to access ALA MIS, open up Firefox and go to the **Bookmarks** menu. Select the **American Legion Auxiliary - Login** page instead of typing in the URL. Or add this page to your **Favorites** from Internet Explorer by going to your Favorites menu and selecting **Add to Favorites**.

### Step 2: Username/Password

### Enter your Username - Usernames are NOT case sensitive

Enter your **Password** – Passwords are case sensitive. Do NOT share your password with other members of your unit. If a new user is appointed, then contact your Department Headquarters for a new ALA MIS account. Firefox may ask you if you want it to remember your password. Select **Never Remember Password for This Site.** 

Fi	refox 🔻			
🕑 l	.og In / I	Register   Mozilla Support	+	
F	) 🖉 (	https://support.mozilla.org/en-	US/use	rs/login
	1	Would you like to remem on mozilla.org?	ber the	password for "test" × ASK A QUESTI
			Rer	member Password
		You can access your passwords o		Never Remember Password for This Site
	Q	Learn More	×	Not Now Mo



The Task Center is the Homepage for the ALA MIS. Click the Task Center button from anywhere on the website, and you will return to the Task Center.

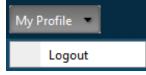
### ALA MIS

### Site Map

	Amer Au	<sub>ican</sub> xil	Legion iary				Logout
enter	Members	Unit	Department	Help	3		
ter	6	7	8	9 malLING ADDRESS: American Legion Aux Unit 0001 PO Box 92747 Anchorage, AK 99509-2747 PHONE:	BILLING ADDRESS: American Legion Aux Unit 0001 PO Box 92747 Anchorage, AK 99509-2747 WEBSITE:	Click to view contact info	rmation Close
Ann	5 Jents					_	Announcement
				** mportan	t Reminders**		· · · · · · · · · · · · · · · · · · ·
Septer			en for paying 20 wal Notices are (	14 New members.			Expand/Collapse Announcements
<u>UNIT</u>							
New n	nembers add	ed prior t	to 08/31/2013, v	vill be counted as 2013 new membe	rs and billed for 2013.		
New n	nembers add	ed on or	after 09/01/201	3, will be counted as 2014 new men	nbers and billed for 2014 dues.		
This w	ill effect you	r membe	ership goals!				
	ional Heado is closed S		Holiday Schedu er 2nd.	le**			
If you	have any p	problems	s or questions,	please contact the ALAMIS Help	Desk.		
			Help Desk	Phone: 317.569.4536 / Fax: 317.5	69.4502 / Email: alamishelp@ALAforVe	terans.org	



For security reasons, please **LOGOUT** and close your browser each time you exit the system. To logout, select the down arrow next to My Profile and then select Logout. You will not be able to view or edit your profile.



### **UNIT NUMBER OR DEPARTMENT NAME**

# The unit number will always be displayed in the middle of your screen in a yellow box no matter where you are on the site. Your unit's contact information can be found by clicking on your unit number in the yellow box.

3

AK UNIT 0001

### **CONTACT INFORMATION**

4

Your unit's contact information is displayed by clicking on the yellow box. It can be hidden by clicking on it again.

AK		
MAILING ADDRESS: American Legion Aux Unit 0001 PO Box 92747 Anchorage, AK 99509-2747 PHONE:	BILLING ADDRESS: American Legion Aux Unit 0001 PO Box 92747 Anchorage, AK 99509-2747 WEBSITE:	<u>Click to view/collapse</u> contact information

### <u>Unit</u>

Your unit's number, legal name, mailing (permanent) address, billing address, telephone number, and website can be found in this area. The remittance address is where unit dues should be mailed. That address may not be the same as the unit's mailing address. To make changes to the unit's telephone numbers, email address and website, go to the Unit tab and edit the unit's information. Any changes to the unit's remittance address should be sent to your department. Changing the unit's dues remittance address does not change the unit's dues remittance person and vice versa. The unit's dues remittance person is a leadership position called Unit Dues Remit. The Unit area (Section 8) of this manual will tell you how to update leadership positions in ALA MIS.

Please note that you will be able to see their mailing (permanent) address and other unit information, but you will not be able to change it. To make other changes to the unit's information, please contact us. Units cannot update their dues remittance address using ALA MIS. This can only be done by Departments or National Headquarters.

### **ANNOUNCEMENTS**

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The information in the Announcements section is controlled by ALA National Headquarters. See this section for dates and times for planned system maintenance, deadline reminders, etc.

## **Members Tab**

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### Add a New Member

### Step 1: Navigation

 $[\mathsf{Members}] \rightarrow \mathsf{Add} \ \mathsf{New} \ \mathsf{Member} \rightarrow \mathsf{Add} \ \mathsf{New} \ \mathsf{Member}$ 

### Step 2: Action Steps

1. Overview

Please search for new members before adding them to the database. This cuts down on the number of duplicate records we have in the database. See the Unit Handbook for guidelines for new members as well as eligibility requirements. After you add a new member, she will be entered into the system as a Pending Member/ Jr Member. After payment is processed, the member will become an Active Member/Jr Member.

### 2. Selection

Fill in the information for each New Member (Required fields have an \*) then select "Add Person" at the bottom of the screen.

### ALA MIS

ask Center Mem	bers Unit Department Help				
embers > Add New	Member >	<u>AK UNIT 0001</u>			
I New Member					
Overview	Selection	Additional Info	Validation	Receipt	
Back		Step: Selection		Continue	
)verview)				(Additional Info)	
ep 2 (Selection) – L	ist New Members				
	ormation and click Add Person. Required r screen. Repeat for each new member y				
the bottom of you	sereen nepeuror each neu member y				
Name					
First:	First Name*				
Middle:	Middle Name				
.ast:	Last Name*				
ermanent Addres		7			
.ine1:	Address Line 1*				
Line 2:	Address Line 2 Address Line 3				
	City*				
		 ▼			
	Zip/Postal Code <sup>:</sup>				
Country:	United States	•			
Contact Informati	on				
Home:	Home Phone				
Work:	Work Phone				
Cell:	Cell Phone				
Email:	Preferred Email Address				
Birthday:	Date of Birth			required if you are adding a juni	
Eligibility Informat				e will be added as a senior memb	er
Eligible Through:	Name of Veteran Eligible Through*		with senior rate	es if no date of birth is entered.	
Veteran Currently:	Living ODeceased				
Post Name:	Veteran's Affiliated Post Name* (Requi	red if Veteran is Living)			
Post Number:	Veteran's Affiliated Post Number* (Req				
Post City:	Veteran's Post City* (Required if Vetera	_			
Post State:	Veteran's Post State* (Required if Veter				
Legion Member:	Veteran's Legion Member ID Number				
Served In:	Veteran Served In War Era*	<b>•</b>		If you make a mi	staka
Relationship:	Applicant's Relation to Veteran*			If you make a mi you have clicked	
Service Branch:	Veteran's Branch of Service	•		you nave click her	
Service branch:	veteran's branch of service	· · · · · · · · · · · · · · · · · · ·		that member's in	nfo or
	1	You must hit the	ADD PERSON b	that member alt	ogethe
Add Person		member will not			
First Name	Middle Name	Last Name	Email		
df	df	df		Edit Delete 🗡	
sgs	dgd	dgd		Edit Delete	
Back (Overview)		Step: Selection		Continue (Additional Info)	

To verify that you have successfully added the member, their name and email will appear at the bottom of the screen. (See example above, Test Person) Repeat for each member you wish to add and click Continue.

Note: If you click Continue without clicking "Add Person" the member will not be added and you will have to reenter the member's information.

Beneath the members you add during this Membership Action, is a list of Pending Members/Junior Members recently added to this unit. Pending members cannot be updated or changed here. They are listed as a reference to help prevent the entry of duplicate members. Once your department has paid dues for the Pending Members, they will become active members and will no longer appear in this list.

#### 3. Additional Info

Here you can change the Join Date if applicable for each member. Enter a join date before September 1 of the current membership year and the member added will be billed for current year dues. Enter a join date on or after September 1 of the current membership year and the member will be billed for next year dues.

Example: On 10/16/2010, Jane Smith is added with a Join date of 8/15/2010. Jane is billed for 2010 Dues but if Jane Smith was added on the same day with a Join date of 9/26/2010, Jane will be billed for 2011 Dues.

Ove	erview 🦲	Selection	۲	Additional I	nfo 🦲	Validation	۲	Receipt
Back Step: Additional Info (Selection)								Continue (Validation)
Step 3 (Additional Information) Please enter the Join Date for the new member. Important! This date will be used to determine the dues year the new member will be billed for. Join Date between 9/1/2012 - 8/31/2013: Member will be billed for 2013 Dues Join Date between 9/1/2013 - 8/31/2014: Member will be billed for 2014 Dues NOTE: Members entered with a future join date will <u>not</u> appear on the Pay Dues Roster until that date.								
First Name	Middle Name	Last Name	Email	Additional Infor	mation			
df	df	df		* Join Date:	3/20/2014		Apply To All	
sgs	dgd	dgd		* Join Date:	3/20/2014	<b>=</b>	Apply To All	

#### 4. Validation

Please review the information to ensure accuracy and enter your electronic signature exactly as it appears on the screen. Then click "Continue" to submit your transaction.

#### 5. Receipt

You have successfully added a Pending Member. Print and keep a copy of the displayed receipt for your records.

To print a receipt either:

- Hit Ctrl+P
- Or go to the upper left hand corner of the page and click on File>Print

<u>F</u> ile	<u>E</u> dit <u>V</u> iew Hi	<u>s</u> tory <u>B</u> ook
	New <u>T</u> ab	Ctrl+T
Т	New Window	Ctrl+N
	Open File	Ctrl+O
	Save Page <u>A</u> s	Ctrl+S
	<u>E</u> mail Link	
	Page Set <u>u</u> p	
	Print Preview	
-	Print	Ctrl+P
	Work Offline	
	E <u>x</u> it	

Another window will open so you can select different options or click ok to proceed with print job.

Print							
Printer							
Name:	\aladc01\SHARP MX-M453 NORTH						
Status:	Ready						
Type:	SHARP MX-M453N PCL6						
Where:	172.17.3.121						
Comment		Print to file					
Print range		Copies					
All		Number of copies: 1					
Pages	from: 1 to: 1						
Selection	on	123 123 Collate					
		OK Cancel					

*Important: The system will now complete an automated process. Please remember that units cannot pay dues, but your department can pay the member's dues after the automated process is completed.* 

### **Edit Member Information**

Departments/Units can view and edit demographic, personal, and membership information for the members in their Department/Unit. They can also see a report of all of an individual member's activities and/or history of all changes made to the member's record.

### **Edit Member Profile**

### Step 1: Navigation

[Members]  $\rightarrow$  Edit Member Info  $\rightarrow$  Edit Member Profile

### Step 2: Find Member

This screen displays basic information for all of the Current Active Members of this Unit in alphabetical order by last name. To see more detailed information and/or to make changes, first find the member using one of the following methods:

- Scroll down to the member
- Use the Filter to display only Senior or Junior Members (Using the filter is particularly helpful when dealing with larger Units). Deceased, pending, and former members will not be displayed.
- Type in any part of the member's First or Last Name and select the member from list of results

C		<sup>ican Legior</sup> xiliary			
Task Cen	ter Members	Unit Department	: Help		
Members	> Edit Member Inf	fo >		<u>MA UNIT 0462</u>	
_	ber Profile	Filter for Senior	r or Junior Members	To search for a member, type any part of the first last name	
A B C D E	Doe, Jane Member Member #12345 Cont Yrs Memb: 1 Paid Thru Date: 1	11 2/31/2014	American Legion Au 1234 Test St City, ST 01234-5678	-	
F G	Edit Profile	Member Activity	Member Change History		

### Step 3: View/Edit Member Profile Information

To view/edit the profile information for a member, click

Return To Roster								
Member	Address	Background	Personal	Communication				
Membership	ID	400456700						
membership	ID .	123456789						
First Name		Jane						
Middle Name								
Last Name		Doe						
Informal First	Name	Jane						
Membership	Туре	MAM						
Membership	Status	A						
Membership	Category							
Home Phone		(123) 456-7890						
Cell Phone		(123) 123-1234						
Email Addres	s	test@test.org						
Save	Cancel							

**Edit Profile** 

Member profile data is divided into 5 tabs:

- Member
- Address
- Background
- Personal
- Communication

Each tab displays different fields, some of which can be edited by Units and others are Read-Only. To make a change to a field, type over the current data and click **Save**. To go back to the roster, click **Return To Roster**.

Please see the following table for a list of all fields available to view in the ALA MIS and which ones Units have rights to change.

### MEMBER DATA/FIELD LIST

### MEMBER TAB

	Field
	Membership ID
	First/Middle/Last Name/Informal First Name
	Membership Type Description
•	MAM – Senior Member
•	MYM – Junior Member
•	PAM – Pending Member
•	PYM – Pending Junior Member
•	XAM – Expired Member
	(expired 2 years or less)
•	XYM – Expired Junior Member (expired 2 years or less)
•	FAM – Former Member (expired more than 3 years)
•	FYM – Former Junior Member (expired more than 3 years)
•	DMAM – Deceased Member
•	DMYM – Deceased Junior Member
Me	embership Category Description
•	CL – Cancelled Membership
•	HLM – Honorary Life Member
•	SLM – State Life Member (CO, NE, ND states ONLY)
•	VIM – Paid Up For Life
Home Phone	
Cell Phone	
Email Address	

### ADDRESS TAB

Field	Note/Membership Action**
Permanent Address	
Alternate Address	
Seasonal Address	After putting in the Seasonal address, you MUST go to the Communications tab and enter the Seasonal Date information.

### BACKGROUND TAB

Field	Note/Membership Action**
Join Date	Contact NHQ to change
Continuous Years	Requires NHQ approval
Initial Unit	Contact NHQ to change
Current Unit	Must complete a Transfer Action to change
Current Dept	Must complete a Transfer Action to change
War Era	
Volunteer Interests	
Branch Service/Legion Information	
Related Type	
Veteran related Thru	Contact NHQ to change

### PERSONAL TAB

Field	Note/Membership Action**
Marital Status	
Date of Birth	
Age in Years	Change the date of birth to alter age in years

### **COMMUNICATION TAB**

Field	Note/Membership Action**		
Magazine Preference	If an email address is entered, a member can receive a link to go online and view magazine vs. a physical copy.		
No Magazine			
No Mail			
No Department Publication			
No Solicitation			
No Calls			
Season Begin Day			
Season Begin Month	For seasonal addresses – Enter the Begin		
Season End Day	and End Month and Day. The Preferred mail address will change used during this		
Season End Month	time every year		
Temp Seasonal			

Note: All changes made by the National Headquarters, the Department, Unit or Member will be listed in the Change Log – A report that details every change made in the system – What the old data was, the new data, when the change was made and who made it.

### **VIEW MEMBER ACTIVITY**

### Step 4: View Member Activity

To view a list of member activities, click

Member Activity

This is a report of all of activities for an individual member. Activities included in this report are: dues payments, changes to leadership positions and committees, continuous year adjustments, and event attendance.

14 4 1	of 1 ▷ ▷ ▮	Select a format	💌 Export	¢				
Individ	Individual Activity Report							
Test, Olivia	Test, Olivia Member ID# 987654321 Printed 6/25/2010							
ACTIVITY 🗧	TRANSACTION DATE	EFFECTIVE DATE	PRODUCT CODE	DESCRIPTION	SOURCE SYSTEM	AMOUNT	POSITION CODES	NOTE
Dues Payments	8/3/2009	1/1/2010	10NATL		DUES	\$5.00	А	
Dues Payments	8/3/2008	1/1/2009	09NATL		DUES	\$5.00	A	
Dues Payments	7/30/2007	1/1/2008	08NATL		DUES	\$5.00	A	
Dues Payments	9/26/2006	1/1/2007	07NATL		DUES	\$5.00	A	
Dues Payments	9/18/2006		NATLVIM		DUES	\$481.00	A	
Dues Payments	2/22/2006	1/1/2006	06NATL		DUES	\$5.00	A	

### **VIEW MEMBER CHANGE LOG**

### Step 5: View Member Change History

To see a list of the changes that have been made to this members profile/record, click Member Change History

In the Reports area, Units can see a report of all of the changes made to the member records in their entire Unit. Here the same information is displayed for each individual member.



### Member Change Log

Olivia Test

Printed 6/25/2010

ID	DATE TIME	SUB TYPE	USER ID	LOG TEXT
123456789	6/25/2010	CHANGE	SCRIPT	Name.MEMBER_TYPE: MYM -> MAM
123456789	6/25/2010	CHANGE	11111111	NAME.LAST_NAME: Auxiliary -> Kelly
123456789	5/25/2010	CHANGE	SCRIPT	Demo_Individual.IN_CURRENT_DEPT: -> WA
123456789	5/25/2010	CHANGE	SCRIPT	Demo_Individual.IN_CURRENT_UNIT: -> 0134
123456789	1/6/2006	CHANGE	ALJAR	COMDTL.ADDR: 1234 MAPLE AVE SW SEATTLEWA 98146

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### **Edit Unit Leaders**

### Guidelines

ALA policies state that in order to be selected for a leadership position, a member must be in good standing and dues must be paid current. In order to edit leaders for a Unit, you will need to know the name of the member, their leadership position and the effective dates.

### Processing

### **Step 1: Navigation**

[Unit]  $\rightarrow$  Edit Unit Leaders

### Step 2: Action Steps

### 1. Selection

The list that displays contains all available Unit level leadership positions and the leaders currently assigned to those positions.

#### Unit Leadership Positions as of September 20, 2013

Unit AEF Chairman	Unit Legislative Chairman
Unit Americanism Chairman	Unit Liaison Child Welfare Foundation Chairman
Unit Cavalcade Of Memories Chairman	Unit Membership Chairman
Unit Chaplain	Unit National Security Chairman
Unit Children & Youth Chairman	Unit Past Presidents Parley Chairman
Unit Community Service Chair	Unit Poppy Chairman
Unit Constitution & Bylaws Chairman	Unit President
Unit Director Of Hospital Volunteers	Unit Public Relations Chairman
Unit Dues Remit	Unit SergeantAt -Arms
Unit Education Chairman	Unit Secretary
Unit Field Service Director	Unit Treasurer
Unit Finance Chairman	Unit UD&R Chairman
Unit Girls State Chairman/Director	Unit VA & R Chairman
Unit Historian	Unit Vavs Representative
Unit Junior Activities Chairman	Unit Vice President
Unit Leadership Chairman	

To edit or assign new leaders, select the positions that will change by checking the box next to the position and click continue.

### ALA MIS

	Unit Finance Chairman	G
	Unit Girls State Chairman/Director	
	Unit Junior Activities Chairman	
	Unit Leadership Chairman	
	Unit Legislative Chairman	
	Unit Liaison Child Welfare Foundation Chairman	
	Unit Membership Chairman	
	Unit National Security Chairman	
<b>V</b>	Unit Past Presidents Parley Chairman	
<b>V</b>	Unit Poppy Chairman	
	Unit Public Relations Chairman	
	Unit SeargantAt -Arms	
<b>V</b>	Unit Ud&R Chairman	
	Unit VA & R Chairman	
<b>V</b>	Unit Vavs Representative	
Back	Step: Selection	Continue
(Overview)		(Additional Info)

#### 2. Additional Information

Click the Find a Member link next to the leadership position to assign a new leader to each position or to mark a position vacant – do this one position at a time.

Overview	Selection	Additional Info	0	Validation	۲	Receipt	
Back (Selection)		Step: Additional Info					Continue (Validation)
Position		New Officer	/	Additional In	formation		
Unit Past Presidents Parley Chairman		🔍 Find a Member 🗡					
Unit Poppy Chairman		Grind a Member					
Unit Ud&R Chairman		Grind a Member					
Unit Vavs Representative		GFind a Member					
Back		Step: Additional Info					Continue
(Selection)							(Validation)

The following Dialog Box will appear. Enter search criteria to find the member. Click the checkbox to select the member for the position.

E		9	×
First Name			
Last Name			
Member Number			
	Search		
	/acant Position		
No records to display.			

The selected members name will appear next to the position title. Repeat for each leadership position and fill in the appropriate effective date.

Overview	Selection	Additional Info	Validation	Receipt
Back (Selection)		Step: Additional Info		(Validation)
Position	New Officer	Additional Informa	ation	
Unit Past Presidents Parley Chairman	🔍 Vacant Posit	tion * Effective Date:	3/20/2014	
Unit Poppy Chairman	🔍 Vacant Posit	tion * Effective Date:	3/20/2014	
Unit Ud&R Chairman	🔍 Vacant Posit	tion * Effective Date:	3/20/2014	
Unit Vavs Representative	🔍 Vacant Posit	tion * Effective Date:	3/20/2014	
Back (Selection)		Step: Additional Info		Continue (Validation)

Note: The effective date you put in will be entered as both the <u>end</u> date for the old position holder and the <u>begin</u> date for the new position holder. For this reason, leadership reports ran the day of the position change may show both leaders. If you need an accurate leadership report the day of the position change, send the request to the ALA MIS helpdesk.

#### 3. Validation

Please review the information to ensure accuracy and enter your electronic signature exactly as it appears on the screen. Then click "Continue" to submit your transaction.

#### 4. Receipt

You have successfully changed the leadership positions for this Unit.

*Please allow 15-20 minutes for the changes to take effect and overnight before running any leadership report.* 

### **Edit Unit Information**

Step 1: Navigation

 $[Unit] \rightarrow Edit Unit Profile$ 

#### Step 2: Edit Profile

The Unit profile data is divided into 2 tabs:

- Unit Contact
- Unit Info

Each tab displays different fields, some of which can be edited by Departments and/or Units and others are Read-Only.

### **Unit Data Field Information**

UnitContact Un	hitInfo
Unit Number	0001
Legal Name	Jack Henry
Permanent	
Address 1	PO Box 92747
Address 2	
Address 3	
City	Anchorage
State	Alaska 👻
ZipCode	99509-2747
Country	United States 👻
Preferred Mail	V
Preferred Bill	$\checkmark$
Preferred Ship	$\checkmark$
Address 1	
Address 2	
Address 3	
City	
State	
ZipCode	
Country	<b>~</b>
Preferred Mail	
Preferred Bill	
Preferred Ship	
Phone	
Fax	
Email Address	
Website	
Save Cancel	

### **UNIT CONTACT TAB**

Field	Dept Edit	Unit Edit	Note/Membership Action**
Unit Number	No	No	Cannot be changed
Legal Name	No	No	Can only be changed by National
Permanent Address	No	No	Can only be changed by National
Remit to Address for Membership Dues	Yes	No	This is the address where Unit dues are sent
Phone	Yes	Yes	
Fax	Yes	Yes	
Email Address	Yes	Yes	
Website	Yes	Yes	

### **UNIT INFO TAB**

Field	Dept Edit	Unit Edit	Note/Membership Action**
# Jr Members	No	No	All of these fields are calculated nightly and can be changed by the Unit/Department by performing various membership actions – i.e. paying dues, adding members, etc.
# Sr Members	No	No	
# VIM members	No	No	
# Paid Dues Members	No	No	
# Unpaid Dues Members	No	No	
E Unit	No	No	
Widow Unit	No	No	
EIN Number	No	No	
Unit Info Legal Name	No	No	Can only be changed by National
Division/District/County	No	No	Can only be changed by National
Division/District/County	No	No	Can only be changed by National
Charter Date	No	No	Can only be changed by National
Unit Number	No	No	Cannot be changed
Department	No	No	

### **Unit Reports**

### **Membership Roster**

The Membership Roster includes all members in the unit. This list includes junior members. This list excludes expired and former members. Expired members are defined as members that expired 2 years ago or less (have not paid dues in two years). Former members are defined as members that have expired 3 years or more (have not paid dues in three or more years).

### Leadership Roster

The Leadership Roster includes the names and contact information for the unit leaders. It also includes their position. To edit or add additional leaders, please go to the unit tab and edit unit leaders.

### **Dues Reports**

### **UNIT DUES PAID ONLINE**

This report is a listing of all members who have either paid their dues online or by phone to NHQ.

#### **UNIT PAID DUES ROSTER**

The Paid Dues Roster Report includes a list of all members who have paid dues for the year that you selected and they are <u>currently</u> in the unit you have pulled up. It doesn't matter what unit those members paid their dues to so this report will include members who transferred into the unit, but paid their dues to their old unit before they transferred into their new unit. It includes the member's ID number, name, address, whether the member has a good address, the member type, the number of continuous years of membership, and the member's date of birth. This report will also tell you the total number of members that have paid for the year that you selected.

#### **UNIT UNPAID DUES ROSTER**

The Unpaid Dues Roster Report includes a list of all members who have not paid dues for the year that you selected. It includes the member's ID number, member type, name, address, phone number, email address, and paid through date.

#### **UNIT DUES ACTIVITY REPORT**

The Dues Activity Report includes a list of all members who have paid dues for the year that you have selected. It also tells you the date that the member paid dues and the amount of the dues they paid to national. This report also includes the member's name and ID number. You can choose a date range with this report. You can also sort by the transaction date. Lastly, this report tells you the total amount that was for national dues by this unit for the date range selected. To enter a date range, enter the minimum date in the Transaction Date Greater than or Equal Date Entered here. Enter the maximum date in the Transaction Less than or Equal Date Entered here. The example below would find all 2017 unit dues paid between 7/1/2016 and 10/1/2017.



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### **REPORTS OVERVIEW**

This is a general overview of ALA MIS Reports. Please see the unit report section for a detailed list of all the reports, descriptions, uses, etc.

#### **Step 1: Navigation**

Navigate to the Report. Unit Reports are located under the Unit Tab.

#### Step 2: Select Report

Example: [Unit]  $\rightarrow$  Unit Reports  $\rightarrow$  2017 Reports  $\rightarrow$  Unit Paid Dues Roster

On the Report toolbar, you can scroll through the pages using the right and left arrows, adjust the size of the page view, search for a record in the report, export all records, refresh the data or send the report to print.



### **Export a Report**

#### To Export a Report to Excel, Word, or a PDF document

- 1. Navigate to Report
- 2. Filter and sort report as needed
- 3. Click square that has a white box and green arrow inside of it and then select the desired format
- 4. Click the Export link

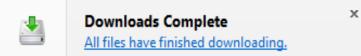
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5. This will open the below Dialog Box. Choose Open or Save File

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	OK Cancel

6. The message below will appear on the bottom right of your screen.



- 7. Select your File Export or wait for it to pop up on your screen.
- 8. The file will open in Microsoft Excel, Word, or Adobe PDF.

### Excel

Excel exports will open up an Excel spreadsheet.

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The name of the report will usually appear in row 1. The name of the department or unit will usually appear in row 2. Additional rows may have more detailed information. If you want to sort your data, then you will need to delete the first couple of rows so only the header row appears in Row 1 and the remaining rows contain data. To delete the entire row (rows 1-3 and row 5) you need to select it and then right-clicking and select DELETE.

Next, you will need to unmerge the cells. To unmerge cells, go to your Home menu and go to Merge & Center in the Alignment section and choose Unmerge cells.

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Next, you will need to delete any blank columns you may have. These columns don't have a header name. To do this, select the column, right-click and choose DELETE.

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Save your file by hitting SAVE AS and naming your document in a location you will remember. Now you should be able to sort your data in Excel or even do a mail merge from Word.

### Word

Word exports will open up a Word document. You can delete rows with this format, but you will not be able to sort your data. Sorting can be done in Excel from the Data menu.

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### PDF

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Only Departments have access to the Department tab.

# HELP TAB

### **Training Materials**

Training materials and system documentation can be found under the Help tab of the website. Training videos on a variety of tasks and membership actions will be uploaded at a later date.

### Helpdesk Emails

If you need assistance using the ALA MIS, check for solutions in the applicable section of the Training Materials. If you still need assistance, please contact the Helpdesk via phone: (317) 569-4536 or email: <u>alamishelp@legion-aux.org</u>

When sending an email, please be sure to include the following:

- Your name
- Department
- What browser were you using? Example: Mozilla Firefox, Internet Explorer, Safari, etc.
- What were you doing when you encountered the issue? Example: I was on the Checkout step of paying dues, I was trying to run the Dues Reconciliation Report, I was trying to update an address, etc.
- If you encounter an error message, please note the exact time the error occurred.
- If at all possible, please include a member name and membership ID tech support can reference.

### NOTE:

Using the Helpdesk Email and Phone line instead of individual staff members phones/emails allows ALA MIS issues to filter through ONE source. This helps us to identify trends/common issues more quickly, prioritize needs, track issues, and improves response times while minimizing duplication of efforts among staff. Sending your ALA MIS issues directly to staff phones, emails or both ultimately results in slower response times and ineffective service.

# NOTES

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