

## Member Records

Membership in the Society can be tracked within the National Database by adding a record for each member. Records can be included for all member types including, active, associate, contributing, non-member (ex: store volunteer) or non-member donor.

A member record must have some basic information. Contact information such as name, street address, city, state and zip code are required fields in a member record. Other contact information such as e-mail address and phone number are optional but helpful in contacting members. A member record also can include personal information including occupation, spouses name and birth year. This personal information is optional.

### Adding a Member

When adding a new member to the database it is very important to first determine whether the person's information is already stored in a record. Duplicate records can cause conflicts that make the database difficult to use and manage. The application will automatically check for duplicates and provide a link to possible duplicate records when you add a new member. A warning is issued by the system but does not prevent an administrator from entering the duplicate record.

The easiest way to check to see if a member already exists in the database is to search for the person via the search box. The alternative is to navigate to the home grouping of the member and see if they already exist in the database. Home Groupings are the place in the Society where most members began their membership. For a majority of the members, it is at the conference level.

Each method has advantages and disadvantages. Exploration and use of the database will help you determine which method you should use.

### Using the Search Box

The search box is located in the upper right hand corner of the page just under the menu bar of the site. Just below the search box you will see some information about **your** personal member record. You will see "Welcome" followed by your name. The next line contains your username, followed on a third line by Home Grouping. Your Home Grouping will be blue and be underlined indicating that it is a link to that location in the database. This link is a short cut to your home grouping and can be utilized to quickly jump to your home spot in the database.



The screenshot shows a dark blue header bar with a search box and a 'Search' button. Below the header, there is a user profile summary for Wendy VanDeventer-Jones. The summary includes a 'Logout' button, the user's name, username (wjones@svdpusa.org), home grouping (National Council), and IP address (216.215.204.46).

|           |   |
|-----------|---|
| Utilities | Search  |
| Logout    | <b>Welcome, Wendy VanDeventer-Jones</b>         |
| View      | Username: wjones@svdpusa.org                    |
|           | Home Grouping: <a href="#">National Council</a> |
|           | From IP: 216.215.204.46                         |

Searching to see if a member is already in the database can be done by entering a first or last name into the yellow box and clicking search. This search process searches the entire database and will result in a listing of any combination of the information entered. If you enter St. Charles, for example, the search will pull all entities with St. and Charles in their name. Common names both first and last can take lengthy amounts of time. If you are searching for a common name, Jones for example, it is often more productive to navigate to the home grouping view the Groupings button rather than wait for the database to search for and display all Jones' in the database.

### Using the Groupings Button

Navigating to the home grouping of a member requires some basic information about the individual. If you know the region, Archdiocese or diocese, district council and conference of the person you can navigate to them quickly. Start by clicking on the Groupings button at the top of the page just under the header.



The next page to appear will list the eight regions of the United States in the Grouping Home section and a listing of Independent Groupings which contains listings of committees and other National groupings. Next to each of the grouping names two buttons will appear. One is the List button. The other is the View button.

### List Vs View

Clicking the List button will list all of the entities under the group name it appears next to. For example, if you click on the list button next to the Western Region you will see a listing of (Arch) Diocese Councils in the ten states that make up the region.

The View button allows you to see information about the grouping it is listed next to. If you click the view button next to an entity you will see the members, leaders, contact information, special works and subgroupings of the group you are viewing. For example, if you click view next to District II of the Diocese of Chicago you will see information about the District Council. You will **not** see a listing of conferences within the District. That can be seen by clicking list next to the Districts name.

An easy way to think of list and view is that clicking on any List button will let you see a list of all of the entities under the group you are looking at in the hierarchy of the Society. Clicking on View will allow you to see information about the grouping listed next to the button.

## Using the Groupings Button Continued

To navigate to a member's home grouping, click list next to the Region the home grouping is located in. You will see a list of (Arch) Diocese that are within that region. Click List next to the (Arch) Diocese the home grouping is in. You will then see a list of Councils within the (Arch) Diocese. Some (Arch) Diocese have only one Council, others have multiple Councils within them. Select the appropriate Council and click List next to its name. You will now see a listing of conferences each with only a View button next to them. This is because once you reach the Conference level you may only view a grouping. No entities reside below the conference level in the database structure.

## Membership and Leadership Tab

Clicking on view next to the name of the Conference will show you information about the conference. The information is divided into tabular sections. The default view is the Leadership and Membership tab (Other tabs will be covered in additional documentation). This tab shows members and leaders in the selected grouping. The tab is divided into two sections-Leadership and Staff and Membership Roster.

The screenshot displays a web interface for the 'ADCC of Detroit [355]' with the 'Leadership and Membership Roster' tab selected. At the top, there are four tabs: 'General Information', 'Leadership and Membership', 'SpecialWorks', and 'Subgroupings'. Below the tabs, the title 'ADCC of Detroit [355]' and subtitle 'Leadership and Membership Roster' are shown. A control panel includes a 'Show' button for 'Leadership and Staff' and a 'Hide' button for 'Membership Roster'. Below this is a 'Membership Administration' section with 'Add New Member' and 'Existing Member Join' buttons. At the bottom, there is a 'Search:' label followed by a yellow search input field.

## Membership Section

The Membership Roster section is the defaulted section. Its view is open when you first get to the tab. The Membership Roster section contains the member roster. All members entered into the database will show on the page. No matter the number of members on the roster they will all appear on one page. If the roster is longer than the view of the browser, scroll bars will appear on the right side of the page so that you may see all of the members. How to add members will be covered later in this document.

## Leadership Section

The Leadership and Staff section can be viewed by clicking on word Show next to the title. This screen will slide downward to display the leadership of the conference. Adding Leadership will be covered in the Leadership document.

## Finding a Member

When viewing the Membership Roster you can look for the name of the member you are attempting to add to the database. On the Membership Roster is the listing of all members. It has six columns: Actions, Name, Roles, Phone, E-Mail and Address.



Membership Administration: [Add New Member](#) [Existing Member Join](#) [Empty All Members](#)

Search:

| Actions  | Name                      | Roles | Phone        | E-mail                       | Address                                     |
|--|---------------------------|-------|--------------|------------------------------|---|
| <a href="#">View</a> <a href="#">Delete</a> <a href="#">Move</a> | Rodriguez, Al [10056]     |       | 512-918-8580 | afodri@aol.com               | 1303 Greenfield Dr<br>Cedar Park TX 78613   |
| <a href="#">View</a> <a href="#">Delete</a> <a href="#">Move</a> | Bingham, Peter [10059]    |       | 512-258-9979 | raastab@aol.com              | 15799 Booth Circle<br>Volente TX 78641      |
| <a href="#">View</a> <a href="#">Delete</a> <a href="#">Move</a> | Cahalan, Kay [10060]      |       | 512-258-6720 | kcabalan@austin.rr.com       | 11701 Brookwood Rd<br>Austin TX 78750       |
| <a href="#">View</a> <a href="#">Delete</a> <a href="#">Move</a> | Daigle, Marsha [10061]    |       | 512-259-4576 | mmdaole@suddenlink.net       | 201 Apache Trail<br>Leander TX 78641        |
| <a href="#">View</a> <a href="#">Delete</a> <a href="#">Move</a> | Goodrich, Bob [10062]     |       | 512-250-1399 | rgoodrich8@austin.rr.com.com | 11810 Brookwood Rd<br>Austin TX 78750       |
| <a href="#">View</a> <a href="#">Delete</a> <a href="#">Move</a> | Martin, Alejandra [10065] |       | 512-918-2427 | amartin95@austin.rr.com      | 1106 Woodhollow Lane<br>Cedar Park TX 78613 |
| <a href="#">View</a> <a href="#">Delete</a> <a href="#">Move</a> | Miller, Tim [10066]       |       | 512-918-2055 | timiller@alumni.nd.edu       | 10222 Prism<br>Austin TX 78726              |
| <a href="#">View</a> <a href="#">Delete</a> <a href="#">Move</a> | O'Neill, Jackay [10067]   |       | 512-250-5782 | ayoneil34@aol.com            | 9703 Talleyran Cove<br>Austin TX 78750      |
| <a href="#">View</a> <a href="#">Delete</a> <a href="#">Move</a> | Rodriguez, Anne [10068]   |       | 512-918-8580 | afodri@aol.com               | 1313 Greenfield Dr<br>Cedar Park TX 78614   |
| <a href="#">View</a> <a href="#">Delete</a> <a href="#">Move</a> | Stewart, Dorothy [10069]  |       | 512-336-1669 | latintogo@att.net            | 1304 Greenfield Dr<br>Cedar Park TX 78613   |
| <a href="#">View</a> <a href="#">Delete</a> <a href="#">Move</a> | Gonzalez, Carmen [54960]  |       | 512-331-0225 | rc1218@sbccolocal.net        | 9704 Meadowheath<br>Austin TX 78750         |
| <a href="#">View</a> <a href="#">Delete</a> <a href="#">Move</a> | O'Brien, Tom [80896]      |       | 512-218-9314 | tbrien@austin.rr.com         | 206 Whetstone Street<br>Round Rock TX 78681 |

## Actions

The actions column shows what your access will allow you to do with a person's record. If you have a username and password but are not the administrator of your grouping or one above it in the structure of the Society, you will be able to view a member record, but not edit it. Non-administrators see only the view button in the Actions column. Administrators are able to edit records and they see View, Delete and Move buttons in the Actions column. Each button is fairly self-explanatory. The View button allows you to view a member record. Delete allows you to delete a member. Move allows a member to be moved to another home grouping (How to delete and move a member will be covered in additional documentation).

## Name

The name of the member appears here. The name is listed as last name with a comma and then first name. Immediately following the members name is the record number associated with the member. It is placed within brackets and appears in a lighter color. The default order of the column is in ascending order by member record number. It can be changed by clicking on the small triangle just above the column. The triangles to the left of the column change the order by record number. The triangles on the right of the column change the order alphabetically.

## Roles

The Roles section of the Member roster lists roles assigned to members within the database. The listing will show those who have online access, are administrators for the grouping and if the member is the contact person for a special work.



| Roles   |
|---|
| Administrator   |
| Online Access   |
| Administrator   |
| Online Access   |
| SVDP Thrift Store [1267]: Contact Person              |
| SVDP Thrift Store [1268]: Contact Person              |
| DePaul Dental [1320]: Contact Person                  |
| Utility Assistance [1325]: Contact Person             |
| DePaul Employment and Training [1326]: Contact Person |
| Camps [1327]: Contact Person                          |
| Van Elslander Food Depot [1328]: Contact Person       |
| Online Access   |
| Online Access   |
| Online Access   |
| Justice Initiative [1329]: Contact Person             |

### *E-Mail*

The E-mail sections lists the email address selected as primary for a member. The database can contain a home and a work email addresses for each member. One of the addresses should be selected as the primary email. If you do not select one the first email entered becomes the primary. The primary address is the one that will appear in the E-Mail column of the Membership Roster.

### *Address*

As with the email address, both work and home postal address can be entered into the database. The address chosen as primary will appear on the Membership Roster page. As with email addresses, if you do not choose a primary address the first address entered into the database will become the primary.

### **Adding Members to the Database**

If the member is not found in the home grouping and they do not appear in the database elsewhere, you should add them to the database.

To add the member you will click the Add New Member button in the Member Roster section of the Leadership and Membership tab.

|   |                                  |                     |                     |
|---|----------------------------------|---------------------|---------------------|
| <b>General Information</b>  | <b>Leadership and Membership</b> | <b>SpecialWorks</b> | <b>Subgroupings</b> |
| St. Maria Goretti [5892]<br>Leadership and Membership Roster  |                                  |                     |                     |
| Show  | <b>Leadership and Staff</b>      |                     |                     |
| Hide  | <b>Membership Roster</b>         |                     |                     |
| Membership Administration: <input type="button" value="Add New Member"/> <input type="button" value="Existing Member Join"/> <input type="button" value="Empty All Members"/> |                                  |                     |                     |

A new page will appear where you can enter the contact information for the member. (For information purposes the screen is shown in two sections below)

|  |   |
|--|---|
| <p><b>NEW Sacred Heart Contact Information</b></p> <p>* Required Field.</p> <p>Grouping: Sacred Heart</p> <p><input checked="" type="radio"/> Member <input type="radio"/> Administrator</p> <p>Member Type: <input checked="" type="radio"/> Active<br/> <input type="radio"/> Associate<br/> <input type="radio"/> Contributing<br/> <input type="radio"/> Non-member(e.g. volunteer)</p> <p>Title: <input type="text"/></p> <p>*First Name: <input type="text"/></p> <p>*Last Name: <input type="text"/></p> <p>Suffix: <input type="text"/> (MD, DDS, MBA, etc.)</p> <p>Address Label: <input type="text"/> Home</p> <p>*Street 1: <input type="text"/></p> <p>Street 2: <input type="text"/></p> <p>*City: <input type="text"/></p> <p>*State: <input type="text"/> Alabama</p> <p>*Zipcode: <input type="text"/></p> <p>Country: <input type="text"/></p> <p>Occupation: <input type="text"/></p> <p>Year of Birth: <input type="text"/> Year (i.e. 1968)</p> <p>Ethnicity: <input type="text"/> Unknown</p> | <p><b> Priest or Bishop Only</b></p> <p>Ordination Date: <input type="text"/> year-month-day</p> <p>Installation Date: <input type="text"/> year-month-day</p> <p>Remarks: <input type="text"/></p> <p>Membership Began: <input type="text"/> Day (01-31)<br/> <input type="text"/> Month (01-12)<br/> <input type="text"/> Year (i.e. 1968)</p> <p>Spouse Name: <input type="text"/></p> <p>Date of Marriage: <input type="text"/> Day (01-31)<br/> <input type="text"/> Month (01-12)<br/> <input type="text"/> Year (i.e. 1968)</p> <p>Phone Label: <input type="text"/> Home</p> <p>Phone Number: <input type="text"/></p> <p>E-Mail Label: <input type="text"/> Home</p> <p>E-Mail Address: <input type="text"/></p> <p>IM Label: <input type="text"/> ICQ</p> <p>IM Handle: <input type="text"/></p> <p>IM Address: <input type="text"/></p> <p>Website Label: <input type="text"/> Home</p> <p>URL: http:// <input type="text"/></p> <p>Required Field. <input type="checkbox"/> Return to this form? <input type="button" value="Add To Contacts"/></p> |
|--|---|

Fill in the members contact information and click Add to Contacts at the bottom of the information section. After adding the member to the contacts you will be returned to the record of the individual you have added.

Edit
**Mr. test perspn**

---

Membership Type: Active (ID: 113445)  
 Year of Birth: 0 year  
 Ethnicity: Unknown  
 Person Modified: Michael Schottenhaml, 25 Feb 2011 10:58 AM

*Occupation Not on Record*  
*Beginning Membership Date Not on Record*  
*There is no Membership Termination Date on Record*  
*There is no Spouse on Record*  
*There is no Date of Marriage on Record*  
*There is no Ordination Date on Record*  
*There is no Institution Date on Record*  
*There are no Remarks for this Record*

+ Add
— Phone —

+ Add
— Address —

Edit
Delete

**Home**
  
 58 Progress Parkway  
 St. Louis MO 63043

**This Person does not have online access.**

Add Online Access:

Username (e-mail address)

Password

Authorize

**Contact Preferences:**

Contact by Mail:  Yes  No

Contact by E-mail:  Yes  No

Contact by Phone:  Yes  No

Save Changes

**Grouping Membership**

test perspn is a member of the following groupings:

- [Sacred Heart](#), Member ([change to Administrator](#)), Home Grouping

**Training**

+ Add test perspn has had the following training:

There is no training on file for test perspn .

If you need to add other members or review the membership roster for the conference, you can easily return to the listing by clicking on the name of the conference under the words Grouping Membership in the middle of the page. Under this title you will find a list of all entities a member is associated with. Clicking on the name of an entity (which is underlined and in blue) will take you to that entities location in the database.

Edit
**Mr. test perspn**

---

Membership Type: Active (ID: 113445)  
 Year of Birth: 0 year  
 Ethnicity: Unknown  
 Person Modified: Michael Schottenhaml, 25 Feb 2011 10:58 AM

*Occupation Not on Record*  
*Beginning Membership Date Not on Record*  
*There is no Membership Termination Date on Record*  
*There is no Spouse on Record*  
*There is no Date of Marriage on Record*  
*There is no Ordination Date on Record*  
*There is no Institution Date on Record*  
*There are no Remarks for this Record*

+ Add
— Phone —

+ Add
— Address —

Edit
Delete

**Home**
  
 58 Progress Parkway  
 St. Louis MO 63043

**This Person does not have online access.**

Add Online Access:

Username (e-mail address)

Password

Authorize

**Contact Preferences:**

Contact by Mail:  Yes  No

Contact by E-mail:  Yes  No

Contact by Phone:  Yes  No

Save Changes

**Grouping Membership**

test perspn is a member of the following groupings:

- [Sacred Heart](#), Member ([change to Administrator](#)), Home Grouping

**Training**

+ Add test perspn has had the following training:

There is no training on file for test perspn .