



SIR Branch 8
Activity Management System (AMS)
Quick Start User Guide V05

Dan Weller dweller@astound.net

Background

1. A Branch 8 Integrated Database Application (IDA) has been developed to provide a common system of the collection, update, and reporting of important Branch 8 information.
 - The benefit of this new system is that any change made to the DB is instantly visible to all users of the DB.
 - There is a single source of data, which eliminates the problem of synchronizing data from different sources.
 - Think of the Integrated DB as an online, up-to-date, accessible Branch 8 Roster.
2. The Activity Management System (AMS) has been developed to take advantage of the new Branch 8 Integrated Database.

Activity rosters will be populated by linking to the members in the Integrated DB. Thus, the activity rosters will automatically change whenever the main DB is updated.
3. The Activity Coordinator will use the information in the Activity Chairs' rosters and events as a source of data for cross-activity reporting.

Background (continued)

4. AMS also has the ability to manage events and the members who participate in these events.
 - The Activity chairs can use this functionality to set up their activity events and to show who participated in each event and what role the member played in each event.
 - The Coordinator can use this collection of events and participants to create reports that reflect the level of participation in our activities.
5. The Coordinator is the only person who can add new activities, or update activity attributes (such as the activity name), or delete an activity.
6. The AMS has the ability to maintain a history of the different positions that a person holds in an activity.
7. AMS can maintain a list of guests for each activity and can track guest participation in Activity events.

Security Notes

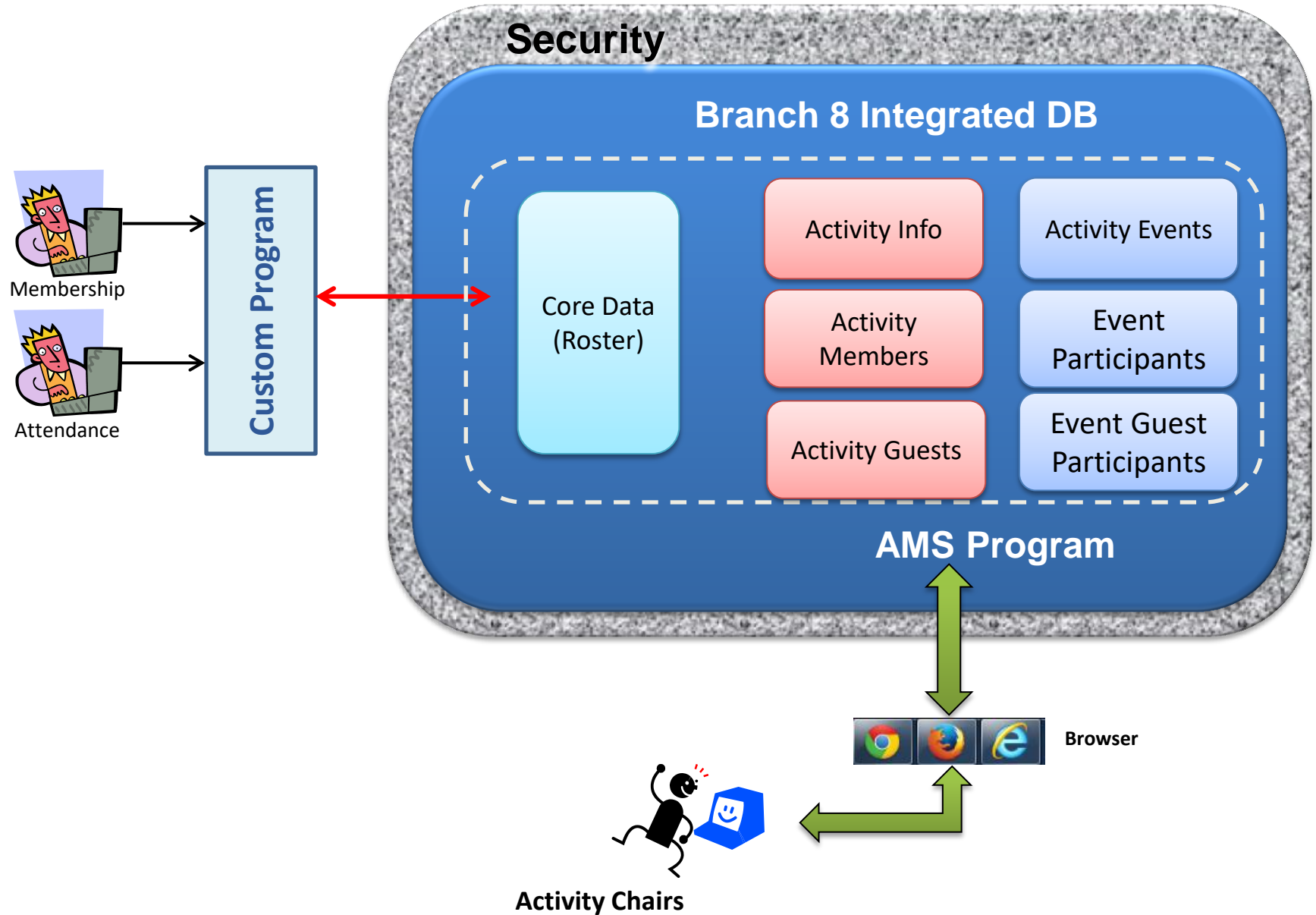
It is important to protect the information in our database from unauthorized access. A robust ID and Password will be used to access the Activity Chair System. The password is CASE SENSITIVE. Enter it exactly as shown.

At this time, all members who access the AMS will use the same ID and Password. This means that everyone with access will be able to update ANY activity's data, not just their own activity. So, you must be very careful to **make sure that you are updating only your own activity.**

Contact Dan Weller for the ID and Password. dweller@astound.net

Logon ID	
Logon Password	

AMS System



Activity Membership Management

Introduction

First of all, let's take a look at the AMS home page.

The screenshot shows the SIR Branch 8 Activity Management System (AMS) home page. On the left is a navigation menu with links: Br 8 Home, Activity Home, Retrieve Activity Data, Retrieve Member Interest Data, Update Activity Participants, Manage Events, Activity Coordinator, and User Guide. A blue bracket groups the links from 'Retrieve Activity Data' down to 'User Guide', with an arrow pointing to the text 'Click on one of these links to go to a specific function.' A yellow callout box with a black border points to the 'Update Activity Participants' link, containing the text 'Click Here to manage your activity members.' The main content area features a welcome message, a list of functions (Get the latest list of your activity roster, Update the status and comments of your activity participants, Set up activity events and track participation in your events), and a section titled 'How do I use the site?' which includes a table of tab descriptions. A blue bracket on the right side of the table points to the text 'Descriptions of the tabs.'

Click on one of these links to go to a specific function.

Click Here to manage your activity members.

Tab	Description
Retrieve Activity Data	Displays lists of your activity's members names, addressess, phone numbers, email addresses, etc.
Retrieve Member Interest Data	Creates a list of members who have specified selected activities that they were interested in.
Update Activity Participants	Change how a person is related to your activity. You can add new participants and guests, update the status of each participant, and add comments about your members and guests.
Activities Coordinator Page	This function is used by the Activities Coordinator to Add new activities, assign activity chairmen to activities, remove obsolete activities, and create reports that include all activities.
Manage Events	Set up activity events and track event participation.

Descriptions of the tabs.

Activity Membership Management

Creating Your Roster Of Branch 8 SIR Members (01 of 3)

SIR Branch 8 Activity Management System (AMS)

1. Click Here

2. Select your activity

3. Select "Add"

4. Click "Next"

Next **Reset**

Br 8 Home
Activity Home
Retrieve Activity Data
Retrieve Member Interest Data
Update Activity Participants
Manage Events
Activity Coordinator
User Guide

This is the Update Data Page. Use this page to:

- Add an existing Branch 8 member or applicant to your activity.
- Add a new Guest to your activity.
- Remove a Branch 8 member, applicant, or guest from your activity.
- Enter comments or change the status of a participant in your activity.

Step 1: Select your activity. Spelunking

Member	Add <input checked="" type="radio"/>	Remove <input type="radio"/>	Change <input type="radio"/>
Guest	Add <input checked="" type="radio"/>	Remove <input type="radio"/>	Change <input type="radio"/>

Step 3: Click "Next" to open the selected action page.

Activity Membership Management



Creating Your Roster Of Branch 8 SIR Members (02 of 3)

Adding Activity Participants

Select one or more members from the dropdown list.

Note: use [Ctrl]+[Click] to select multiple members. If you miss some members, go back to this page and add the rest.

1. Select your participants from the drop down list.

Click on a letter of a Last Name to skip to that letter. Do not do this after you have selected a name because your selection(s) will be reset when you enter a letter.

- Use [Ctrl] + [Click] to select multiple members.

Click "**Submit**" to add the selected people to your activity.

Members and Applicants
Note, Inactive Branch Members are Shown Like This:
last name, first name (I)

Members Of This Activity
are Shown Like This:
last name, first name (M)

- ... Select Members
- Alexander, Patrick
- Allard, Mike (I)
- Allen, Dave
- Allen, Don
- Allen, Monte
- Anderson, Mike
- Anthony, Joe
- Arvizu, Rick (I) (M)
- Atwater, Don (M)
- Bailey, Bob
- Bal, Richard
- Bargenquast, Bill
- Barnard, Bill
- Barnes, Bob

2. Click "Submit" when you are done.

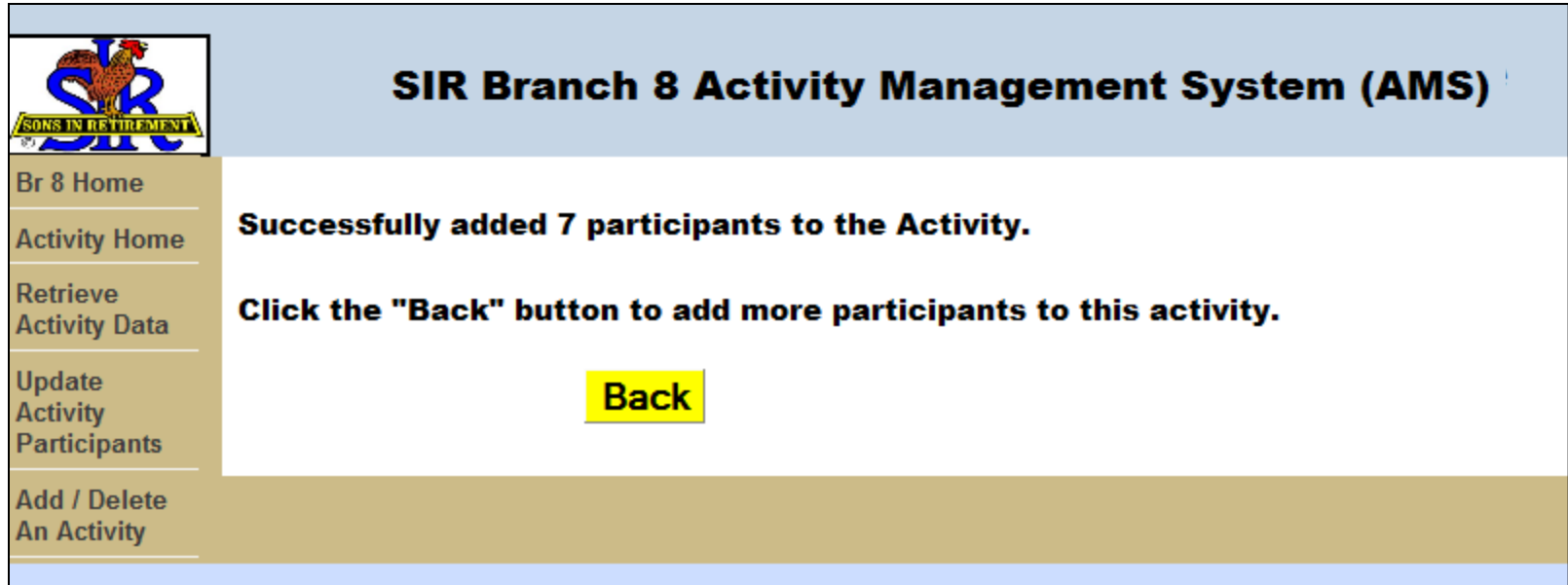
Note, current members of your activity are shown with a following "(M)". These entries are not selectable.

Submit

Reset

Activity Membership Management

Creating Your Membership List (03 of 3)



The image shows a screenshot of the SIR Branch 8 Activity Management System (AMS) interface. On the left is a vertical navigation menu with a logo at the top that reads "SONS IN RETIREMENT" and "SIR". The menu items are: "Br 8 Home", "Activity Home", "Retrieve Activity Data", "Update Activity Participants", and "Add / Delete An Activity". The main content area has a light blue header with the text "SIR Branch 8 Activity Management System (AMS)". Below the header, the text reads: "Successfully added 7 participants to the Activity." followed by "Click the 'Back' button to add more participants to this activity." A yellow button labeled "Back" is centered below the text. The bottom of the interface has a light blue footer bar.

Activity Membership Reports (01 of 5)

Get A List Of Your Activity Members

SIR Branch 8 Activity Management System (AMS)

View Activity Data

1. Click here. (Callout pointing to 'Retrieve Activity Data' in the sidebar)

2. Select your Activity. (Callout pointing to the 'Spelunking' dropdown menu)

3. Select the fields that you want in your report. (Callout pointing to the 'Step 2: Specify The Report Fields' section)

4. Click Submit. (Callout pointing to the 'Submit' button)

Step 1: Select Your Activity Spelunking

Step 2: Specify The Report Fields

<input checked="" type="checkbox"/> Email Address	<input type="checkbox"/> Spouse / Partner Name
<input type="checkbox"/> Mailing Address	<input type="checkbox"/> Birthday (mm/dd)
<input checked="" type="checkbox"/> Phone Number	<input checked="" type="checkbox"/> Activity Role / Status
<input type="checkbox"/> Comments	<input type="checkbox"/> Activity History *

Step 3: Options

- Display An Email Addressee List
- Include Guests

Step 4: Get The Report **Submit**

Activity Membership Reports (02 of 5)

Report Example (Test Data, not to be believed)

Activity Participants For Spelunking

[Back](#)

Name	Phone	eMail	Address	Status	Role
Bob Barnes	686-0106	bob_barnes@msn.com	3901 Dana Ct. Concord, CA 94519	Active	Member
Ed Benson	943-7011	ebensonbwa@aol.com	1289 Crown Ct. Walnut Creek, CA 94597	Active	Member
Bill Douglas	945-8009	bdoug33@aol.com	3173 Valley Vista Road Walnut Creek, CA 94598	Active	Member
Harry Hubinger	837-4381	regnibuh@aol.com	157 Montair Dr. Danville, CA 94526	Active	Member
William Hunter	947-6947	wkhbill@pacbell.net	430 Sutcliffe Place Walnut Creek, CA 94598	Active	Asst. Chair
Stanley Johnson	938-7016	stan.johnson88@gmail.com	3151 Stinson Circle Walnut Creek, CA 94598	Active	Member

Activity Membership Reports (03 of 5)

Reporting Notes

1. The Activity Member's name is always displayed. That is why it is not on the field selection list.
2. The selected fields are always presented in the same order.
3. The width of the report is always the width of your browser window.
4. The source of this data is the Branch 8 Integrated DB. Contact the Membership Secretary if you notice that some information is incorrect. You cannot change any of the core data (information that you would see in the Branch 8 Membership Roster). The only data that you can change is the activity Status and Role.
5. Only the most current Status and Role are shown on the reports unless you select "Activity History," which causes each change in Status or Role to be displayed on a separate line.
6. There is not a supplied export facility that would allow you to copy your report to another program, such as Excel or Numbers.
 - But there are some Chairmen who keep member data that includes information not in this system.
 - We advise you to be careful if you do export AMS data to your PC or Mac. You should frequently run Activity reports to ensure that you have the latest membership updates.

Activity Membership Reports (04 of 5)

Getting Branch 8 Member Information

Report Submit

has a fixed format consisting of: Name, Status, Role, Start and End Dates, and Comments.

Get A Branch 8 Member's Phone Number, Email, Interest And Activity Data

Select a person from the dropdown list and click "Submit"

- Duncan, Marechal
- Durst, Ted
- Eich, Bill
- Ensign, Alan
- Erickson, Jim**
- Esposito, Vic
- Fagan, John
- Fahrenkrog, Al
- Fitzpatrick, Dennis
- Flahiff, Jerry

Submit

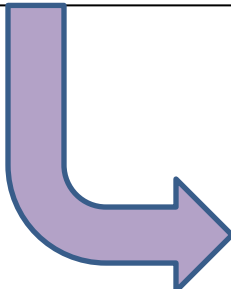
Note, this feature will display "Roster" information on any active Branch 8 member, including members not in your activity.

Applicants Only

Member Interest And Activity Report For Jim Erickson

Phone: 939-7925 Email: erickson.jim@att.net

INTERESTS		ACTIVITIES			
Rank	Interest	Activity	Start Date	Role	Status
1	Bowling	Bowling	2014-06-07	Assistant Chair	Active
2	Golf 18 Hole	Heads Up Walkers	2014-02-13	Member	Active
3	Travel - World				
	Wine Tasting				
	Biking				
	Computer Security				
	Computers				
	Cooking				
	Golf Couples				
	Hikers				
	Walkers				



Activity Membership Reports (05 of 5)

Getting Applicant Information

Report Submit

has a fixed format consisting of: Name, Status, Role, Start and End Dates, and Comments.

Get A Branch 8 Member's Phone Number, Email, Interest And Activity Data

Select a person from the dropdown list and click "Submit"

- Duncan, Marechal
- Durst, Ted
- Eich, Bill
- Ensign, Alan
- Erickson, Jim**
- Esposito, Vic
- Fagan, John
- Fahrenkrog, Al
- Fitzpatrick, Dennis
- Elabiff, Jerry

Submit

Get The Interests and Activities For ALL Current Applicants

Applicants Only

Note, this feature will display contact information and interests for all active applicants. Check this report often since the list of applicants changes each month.

Member Interest And Activity Report For Denny Hintz

Phone: 736-4761 Email: dennyhintz@gmail.com

INTERESTS		ACTIVITIES			
Rank	Interest	Activity	Start Date	Role	Status
1	Golf 18 Hole				
2	Sirs In The Kitchen				
3	Hikers				
	Bocce Ball				
	Book Group				
	Bowling				
	Computers				
	Golf Couples				

Next Steps

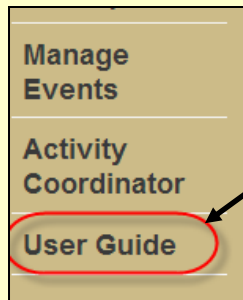
So far, you have:

1. Found the website and logged on.
2. Found your activity in the drop down list
3. Added members to your activity
4. Created a report that shows your Activity membership

What's next? You may want to:

1. Change the Status (Active, Inactive, Guest) or the Role (Member, Chair, Co-Chair ...) of one or more members
2. Remove someone from your roster in the event that you mistakenly added the wrong person
3. Develop your Activity Event Calendar and associated Events and start tracking your event participation.

Where do I find detailed instructions on the next steps?



1. Click here to download the detailed User Guide which covers all functions of AMS.