

USY Chapter Records Manual

**A MANUAL FOR
CHAPTER PRESIDENTS,
CHAPTER COMMUNICATION VPs,
AND
CHAPTER ADVISORS/YOUTH DIRECTORS.**

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Introduction

What Is Chapter Records?

USY Chapter Records is an application that helps chapters do what chapters are good at. It is meant to help with managing membership (including keeping track of when members need to renew their dues), keeping track of members' religious knowledge, keeping track of member attendance at events, keeping track of members' birthdays, creating phone trees, printing mailing labels, printing directories, keeping track of events, and so much more!

Logging In

There are two ways to log into Chapter Records. You can login with an individual or a master account. We will get to the differences between the two types of logins later.

To login go to <http://www.usy.org/chapters/records>. You will reach a page that looks like *Figure 1-1* on the next page.

Individual Login

To login with an individual account, use the form at the top half of the screen where it says “***Individual Login***”. These are accounts that are created within the program by someone who has access to create additional logins. We will talk more about that later. These logins are not supplied by USY.

Master Login

To login with a master account, select your chapter from the drop-down list of chapters where it says “***Your Chapter***” under the “***Master Login***” section on the bottom half of the screen. Then type in your password. This password is originally supplied by USY. If you do not have it, contact the International Communications Vice President at communications@usy.org or the USY Online Services Chairperson at online@usy.org. If it is the first time that the chapter has logged in using the “master login” you will be asked to change the password. It is highly recommended that this password is given to an advisor or someone else who can keep track of it for future use.

Note: If you are in charge of maintaining Chapter Records for you chapter, you do not necessarily have to create an individual login for yourself. Since you will want to have access to all the features, creating a separate individual login will have no advantage or disadvantage.

Log In

If you have an individual login, and not a chapter's master login, then use the top form. If you are using a chapter's *master login*, then use the bottom form.

Individual Login

Input your username and password. It is not necessary to choose your chapter, because your login is tied to your chapter.

Forgot your password? [E-mail us](#) and we'll help you out.

Your Username:

Remember Me

(When you come back to log in later, the web page will remember your username. **You will have to re-type your password.**)

Your password:

Master Login

Please select your chapter from the drop-down box, and input your password. If you don't have your chapter's login information, you can [contact your regional communications vice president](#) and they can help you out.

Forgot your password? [E-mail us](#) and we'll help you out.

Your
Chapter:

Remember Me

(When you come back to log in later, the web page will remember what chapter you are from. **You will have to re-type your password.**)

Your
password:

Do you feel that there is a feature missing from this page that you think would be helpful to you in your use of the USY Chapter Records? [Let us know!](#)

Figure 1-1

How To Use Chapter Records

Chapter Records is laid out pretty simply. On the left in the red box is the navigation bar. All the links to the different features of the application are listed here. On the right, in the yellow box, is where the current feature that you are working on is shown. Throughout the rest of the manual, we will walk through how to use all of the features that Chapter Records has to offer.

Main Menu

Home Page

On the home page you will find a brief explanation of what Chapter Records is and has to offer. Below the explanation will be links to things that have to get done soon. This list is compiled from the different items such as events, birthdays, phone trees, and other items that have been entered and have to be dealt with soon.

Log Out

This will log you out of the program. To reenter to your chapter's site, you will have to re-login.

Change Password

This is the page you can use to change the password with which you log in. Note that you will be logged out after changing your password, and that you will just need to re-enter it in the login screen to get back into your Chapter Records administration section.

Help

From here you can find access to various materials related to the USY Chapter Records, and other information related to finding help with whatever problem you might have. You will also find a copy of this manual there.

USY Online

A link to the main USY website (www.usy.org)

Chapter Resources

This page provides links to many different sources of information for a chapter. The links on this page are to different online guides to help improve every aspect of your chapter.

Logins

Add Login

This is where you can create additional usernames for your chapter. Through this screen you can create logins for board members, advisors, and other people that you want to let access this site. You can also customize what a certain user is allowed to access when they log in.

Adding additional logins to your Chapter Records can do a lot in terms of making them easier to use for your chapter's board. You can give board members access to only certain parts of your chapter's records, and it also allows you to track exactly what each person does. Additionally, it makes it easier on everyone in terms of remembering passwords.

List Logins

On this page you can find a list of *individual* logins for this chapter's Chapter Records, which allow individual people to do specific things, and not necessarily access everything, which the *master* password allows you to do.

Members

Add A Member

This page is used to add a new "member" to the list of members of your chapter. This "member" could be a paid member, an unpaid member, or just someone who is on your mailing list.

View All Members

On this page, you can see a list of all the members of your chapter -- both those who have paid their dues, and those who haven't yet. On this page you will see the following information:

- First Name
- Last Name
- Grade
- E-mail address

All other information on each individual member, and actions that can be taken on them, can be found by clicking the link **View All Information** for that member.

List Paid Members

On this page, you can see a list of all the members of your chapter who have paid their dues. On this page you will see the following information:

- First Name
- Last Name
- Grade
- E-mail address

All other information on each individual member, and actions that can be taken on them, can be found by clicking the link **View All Information** for that member.

List Unpaid Members

On this page, you can see a list of all the members of your chapter who have **not** paid their dues. On this page you will see the following information:

- First Name
- Last Name
- Grade
- E-mail address

All other information on each individual member, and actions that can be taken on them, can be found by clicking the link **View All Information** for that member.

List Renewable Members

While all members can repay their dues at any time (i.e. are "renewable"), on this page, you can see a list of all the members of your chapter who are approaching the point in time at which their membership has expired (a year after paying their dues last year). So this page lists people who need to pay their dues within the next 30 days to remain a member of your chapter.

List This Month's Birthdays

On this page, you can see a list of all the members of your chapter who have a birthday in this month. On this page you will see the following information:

- First Name
- Last Name
- Birthday
- Upcoming Age

All other information on each individual member, and actions that can be taken on them, can be found by clicking the link **View All Information/Actions** for that member.

Export Member Data

Just because you have information here on the USY Chapter Records doesn't mean that you can't use it anywhere else -- in fact, it means that you can do a lot more with it! On this page you can choose various ways to export your membership data.

If you want to export member contact information to a more easily printable format, you can also print a membership directory.

- **Export Basic Membership Information to MS Excel** - Use this to download a Microsoft Excel *.xls* file with basic information on your members (name, phone number, email, etc.).
- **Export Complex Membership Information to MS Excel** - Use this to download a Microsoft Excel *.xls* file with most information on your members (name, phone number, email, parent's contact information, etc.).

Import Member Data From CSV

If you are just starting to use the Chapter Records, you might have all of your members' information in another place on your computer. If you have it in a Microsoft Excel file, or another spreadsheet program, you can save your spreadsheet as a CSV (Comma-Separated Values) file, and use that file to import your members' information.

To save a spreadsheet as a CSV file, in most applications (and specifically in MS Excel), open your spreadsheet. Then, click "**File**" and then "**Save As**". In the "**Save as Type**" pull-down box, choose "**CSV (comma delimited) (*.csv)**". Then you'll have a CSV file that we can work with!

There is no specific format that your file has to be in for it to be imported. We give you the ability to customize the importing utility so that it will fit your file's format that it already is in; you do this part after you upload the file.

First, input your spreadsheet and submit it to upload the spreadsheet file. After you upload the file, you can pick which fields in the database that the columns in your spreadsheet match up to, and click "Import!" It's as simple as that.

Important Note: If you do not import the information on if they are paid members of your chapter, and/or when they paid, then it will be assumed that they are **unpaid** members, not **paid** members. In the same way, if the following data is left empty, this is what the default will be:

Field	Default (if left empty)
First Name	(blank)
Last Name	(blank)
Middle Initial	(blank)
USYer's Email	(blank)
USYer's Phone Number	(blank)
Sex	Male
Grade	9
Parent #1 Name	(blank)
Parent #2 Name	(blank)
Parent's Email	(blank)
Emergency Contact's Name	(blank)
Emergency Contact's Address	(blank)
Emergency Contact's Phone Number	(blank)
Street Address	(blank)
City	(blank)
State/Province	<i>Your State</i>
Zip/Postal Code	(blank)
Country	<i>Your Country</i>
Notes	(blank)
Dues Paid?	No
When were dues paid?	(blank)

Another Important Note: If your top row is one that says what the columns are below it, you should take it out so that all that is in the spreadsheet is member data. Otherwise, that row will be input as a member.

Another Important Note: After the data is imported, you will be presented with a list of the members imported so that you can see that it is correct, and/or fix any data (such as if they are a paid member or not) that is incorrect.

Print Dues Forms

This page lets you print out the dues forms for your chapter so that you can update the membership with new members who are not yet in the USY Membership Database that is used to send out *Achshav!* and other USY publications, which you send into the International USY Office. This is the same form that you can get on the USY site, except that it will already have the information of your members on it.

Important Note: If you have not sent in your membership at all this year yet, please wait until you have received the pre-printed form (with the membership information from last year) in the mail from the International Office. That form is used to update information on current members. The form that you can print out from this page is only for adding new members to the database.

These forms still need to get the signatures of the Advisor and Rabbi, and be sent in with the check to the International Office. This is *not* a way to send in your membership information to the Office via the internet. It is only a way to put together your forms more easily.

You can choose which members will be listed on the forms (default is all paid **new** members).

Simply fill out the form, and an Adobe Acrobat (.pdf) file will download onto your computer. You can save the file onto your computer for use at a later time, though you can always re-access it here on this page.

Once you download the file, you can print it on your labels using your printer. When printing, make sure that you **deselect** the following options:

- Shrink oversized pages to paper size
- Expand small pages to paper size
- Auto-rotate and center pages

Dealing With Dues In The USY Chapter

This page explains how dues in USY work.

Communications

Add Phone Tree

If you use this page, you can create a new phone tree for your chapter, and then manipulate it to add people to it and adjust it. Your chapter can have as many phone trees set up as you want to (it's unlimited!). Making a phone tree is as easy as 1-2-3 -- actually, it **is**, because it is a three-step process! (There is a fourth step, but it is just reviewing the phone tree that you have made to make sure that it's ok, before it is added)

Just follow the instructions on this page and the following pages, and it should be a breeze! The process is very customizable.

List Phone Trees

On this page, you can see a list of different phone trees that have been developed for your chapter from the **Add a Phone Tree** page.

Print Mailing Labels

This page lets you print out custom mailing labels for members in your chapter. You can choose the kind of labels that you are printing onto (i.e. the layout of the labels), and which members the labels will be printed out for (default is all members).

Simply fill out the form, and an Adobe Acrobat (.pdf) file will download onto your computer. You can save the file onto your computer for use at a later time, though you can always re-access it here on this page.

Once you download the file, you can print it on your labels using your printer. When printing, make sure that you **deselect** the following options:

- Shrink oversized pages to paper size
- Expand small pages to paper size
- Auto-rotate and center pages

Print Return Address Labels

This page lets you print out custom mailing labels for your chapter's return address. You can choose the kind of labels that you are printing onto (i.e. the layout of the labels), and how many labels to print out (the default is the normal number of labels on a page for the kind of labels you are printing onto).

Simply fill out the form, and an Adobe Acrobat (.pdf) file will download onto your computer. You can save the file onto your computer for use at a later time, though you can always re-access it here on this page.

Once you download the file, you can print it on your labels using your printer. When printing, make sure that you **deselect** the following options:

- Shrink oversized pages to paper size
- Expand small pages to paper size
- Auto-rotate and center pages

Print Members Directory

This page lets you print out a member's directory (i.e. a directory of the contact information of the members in your chapter) in either a book format, or a table format. You can print it out for the use of your board, or give it out to your entire chapter. You can choose which members you want to be included in this directory (default is all paid members), and also which information that is included in the directory (such as address, phone number, and so on).

Simply fill out the form, and an Adobe Acrobat (.pdf) file will download onto your computer. You can save the file onto your computer for use at a later time, though you can always re-access it here on this page.

Once you download the file, you can print it on your labels using your printer. When printing, make sure that you **deselect** the following options:

- Shrink oversized pages to paper size
- Expand small pages to paper size
- Auto-rotate and center pages

Instructions on putting the book together: Once you print it out, you need to set it up so that it will work correctly. The first page is the title page of the booklet, and you should print it single-sided. The following pages, the inside of your booklet, will have the information about the members. Print those pages double-sided, and then fold everything over in the middle. You should then be able to turn from page to page and it will work properly in terms of staying in alphabetical order. Enjoy!

Print Calendar

This page lets you print out a calendar for either this month or for another month in the year. You can print it out to mail out to your chapter, or make a specific calendar for different things (a board calendar for board meetings and committee meetings, a birthday calendar, a holiday calendar, and so on). You can choose which information you want to include in the calendar, such as events, members' birthdays, Jewish holidays, and so on.

Simply fill out the form, and an Adobe Acrobat (.pdf) file will download onto your computer. You can save the file onto your computer for use at a later time, though you can always re-access it here on this page.

Once you download the file, you can print it on your labels using your printer. When printing, make sure that you **deselect** the following options:

- Shrink oversized pages to paper size
- Expand small pages to paper size
- Auto-rotate and center pages

Send E-mail To Members

The Announcements E-mail List is a great tool that you can use to keep your members informed about what's going on in your chapter! You can add them as a member through the USY Chapter Records -- and then you can send out announcements to them (from this page) right through your web browser!

With just a few keystrokes, you can send out an e-mail telling them about a new program, or that something is going on at the Synagogue, or **anything!** While a traditional mailing may take a few days to send out, cost postage, and take time to stuff into envelopes and address, sending out an e-mail to your members gets it to them **instantly**.

Now, that doesn't mean that you should stop sending out regular mailings. Sending out e-mails works best **in conjunction with** sending out real flyers, but they do have a lot of other uses that flyers just don't work for -- to get news out about something that is coming up fast, to bring attention to your website, and also complimenting the flyers by re-sending out the information that you sent in the mail: upcoming programs, news, and the such.

On this page, you can send out the e-mail to your members. You can send e-mails to: paid members and/or unpaid members. Here, you can select exactly which members will get the e-mail (the default is all members), and also input the message to be sent out.

Events

Add Event

This page can be used to add an event for this chapter. This event can be a chapter, sub-regional/divisional (if your region is like that), regional, or even an international event that you want to keep track of.

Chapter Records can keep track of the name, date, time, location, and cost of the event. Afterwards you can go and keep track of the amount of Tikun Olam raised at the event and the members that came to the event.

List Events

On this page, you can see a list of all the chapter events and the related information. On this page you will see the following information:

- Event Name
- Event Date
- # Attended

You can see exactly which members attended a specific event, other information about the event, and actions you can take on this event (editing and deleting), by clicking **View All Information/Actions**.

Export Event Data

Just because you have information here on the USY Chapter Records doesn't mean that you can't use it anywhere else -- in fact, it means that you can do a lot more with it! On this page you can choose various ways to export your events data.

- **Export Basic Event Information to MS Excel** - Use this to download a Microsoft Excel *.xls* file with basic information on your events (ID, Date, Name).
- **Export Complex Event Information to MS Excel** - Use this to download a Microsoft Excel *.xls* file with most information on your events (ID, Date, Name, Attendance, Time, Location, T.O. Money).

Other

Chapter Statistics

Based on the data you have entered into Chapter Records, this page gives you statistics on membership, events, and T.O. for your chapter.

List Religious Services

Here you can find a list of which members of your chapter can do which religious services based on the data entered.

Print Religious Services Form

This link will download a PDF form to your computer that can be used to distribute to members in order to find out who can lead certain religious services.

View T.O. Funds

Tikun Olam is the charity fund of USY. Hundreds of thousands of dollars are raised annually, and donated to charities around the world that make a difference in peoples' lives every day. Chapters donate much of this money; and on this page you can see how your Tikun Olam money pans out.

At each chapter event, you have the ability to raise money for Tikun Olam. On the **Add an Event** page, you can input the amount of money you raised for Tikun Olam at that program or fundraiser. On this page, you can see how those numbers add up to give you your amount of Tikun Olam money for the year.

View Treasury

The **Treasury** section of the USY Chapter Records is a tool that helps chapters keep track of their money. You can use it to keep track of when money was deposited in your account, and when money was taken out to pay for things. **You don't put in information about your accounts (i.e. account numbers, passwords and so on), just information about when money was taken out of and put into the account so that you can refer to it at a later time.**

On this page, you can see a list of past transactions with your account. Or, if you feel like it, you can add a transaction.