SIR Branch 8
Activity Management System (AMS)
Quick Start User Guide V04

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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.

Getting Started

Equipment Required	Any PC or Mac or Tablet that has access to the internet.
Software Required	The Activity Chair System is a web-based application. All you need is a modern web browser such as Internet Explorer (Microsoft), Firefox (Mozilla), Chrome (Goggle), or Safari (Apple). No special software will be installed on your computer.
Web Site Address	http://www.sirinc3.org/br8db/ActivityChair/

Security Notes

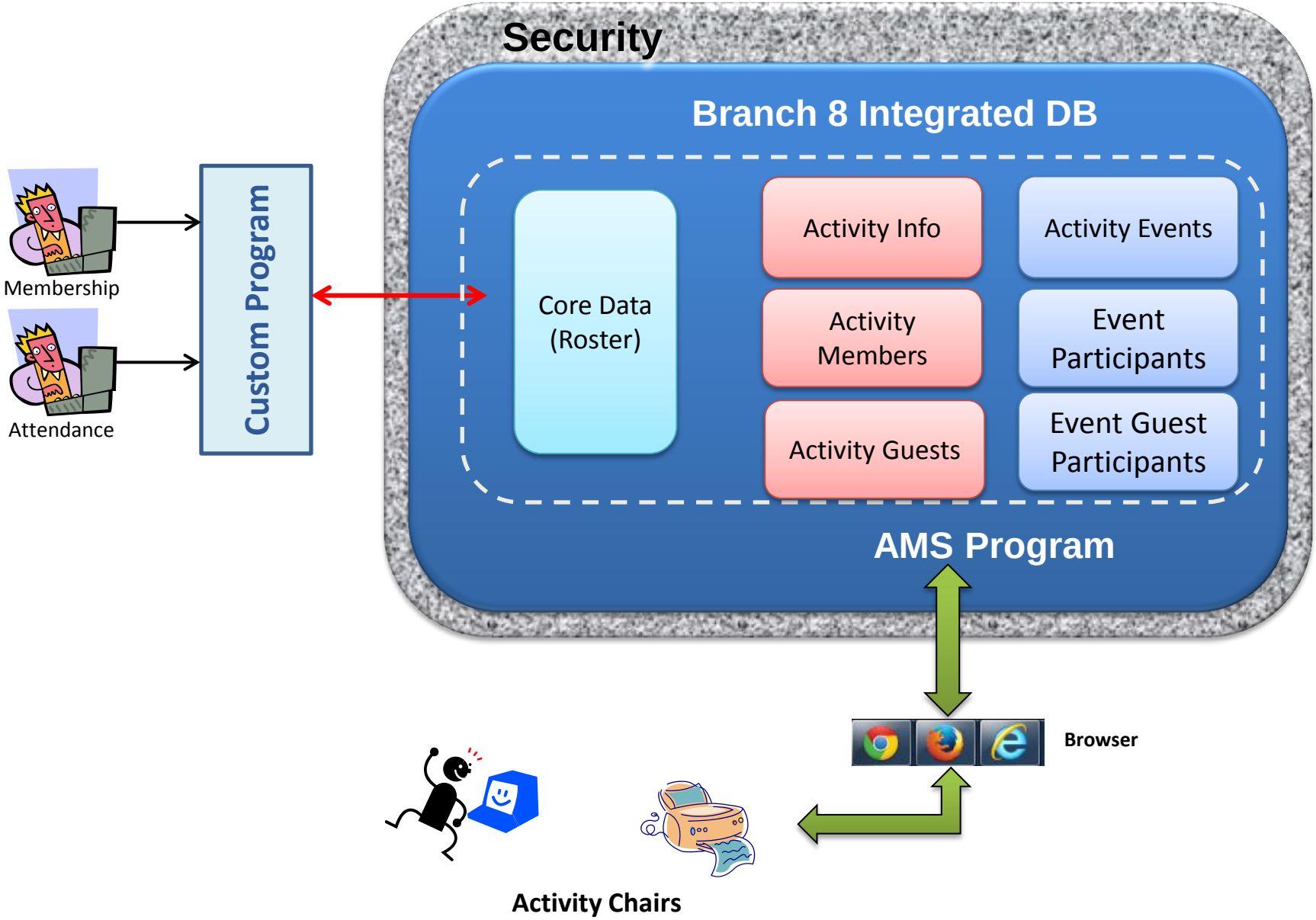
It is important to protect the information in our database from unauthorized access. A robust ID and Password will be used to access the Activity Chair System. The password is CASE SENSITIVE. Enter it exactly as shown.

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**.

Note, this document can be accessed by the public. Therefore, the logon ID and Password are not shown on this page.

Contact Dan Weller and he will email you a version of this manual that has the logon credentials.

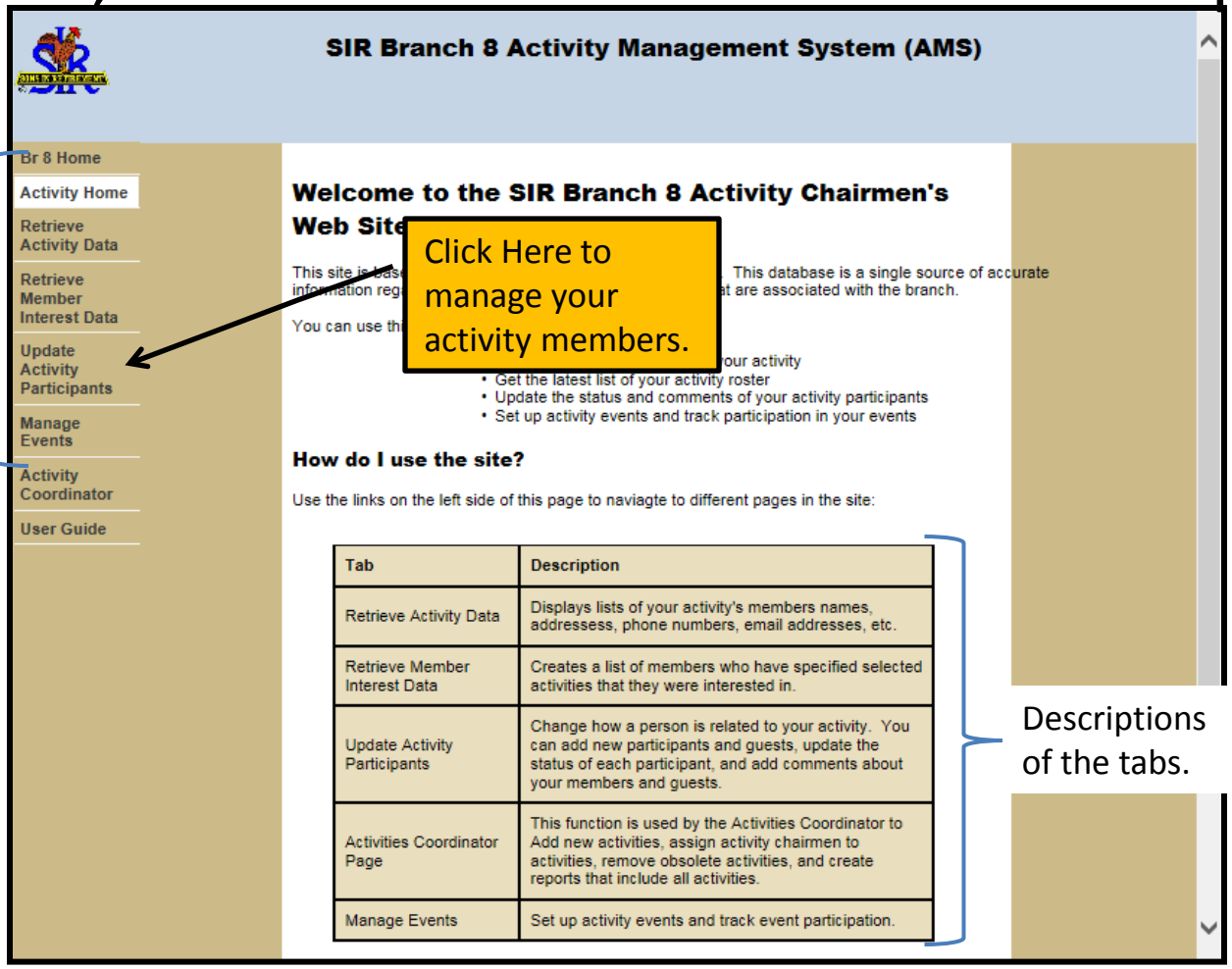
AMS System


Security
Branch 8 Integrated DB
Membership
Attendance
Custom Program
Core Data (Roster)
Activity Info
Activity Events
Activity Members
Event Participants
Activity Guests
Event Guest Participants
AMS Program
Browser
Activity Chairs

Activity Membership Management Introduction

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

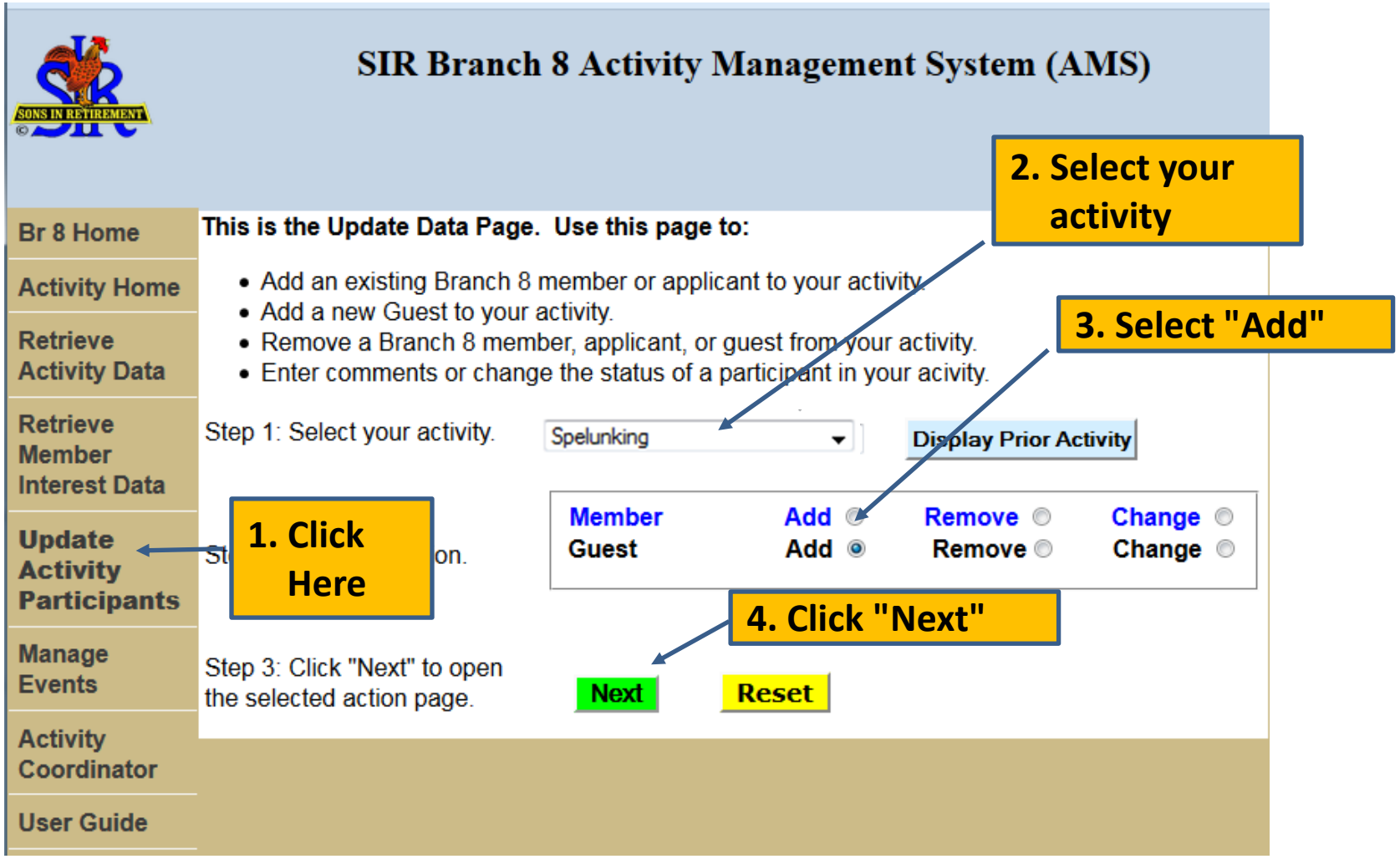
Click on one of these links to go to a specific function.



Descriptions of the tabs.

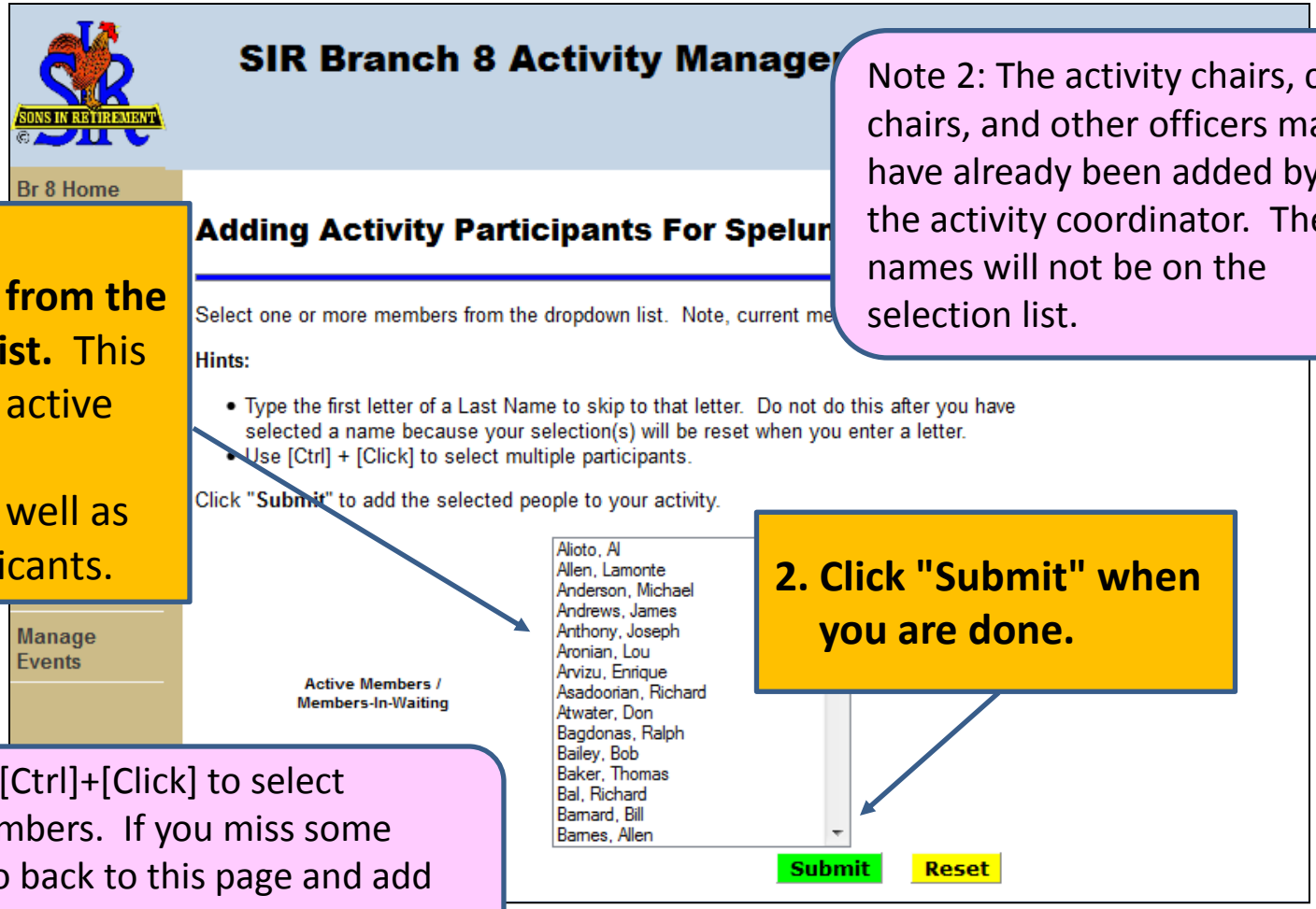
Activity Membership Management

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



Activity Membership Management

Creating Your Membership List (02 of 3)



1. Select your participants from the drop down list. This is a list of all active and inactive members as well as current applicants.

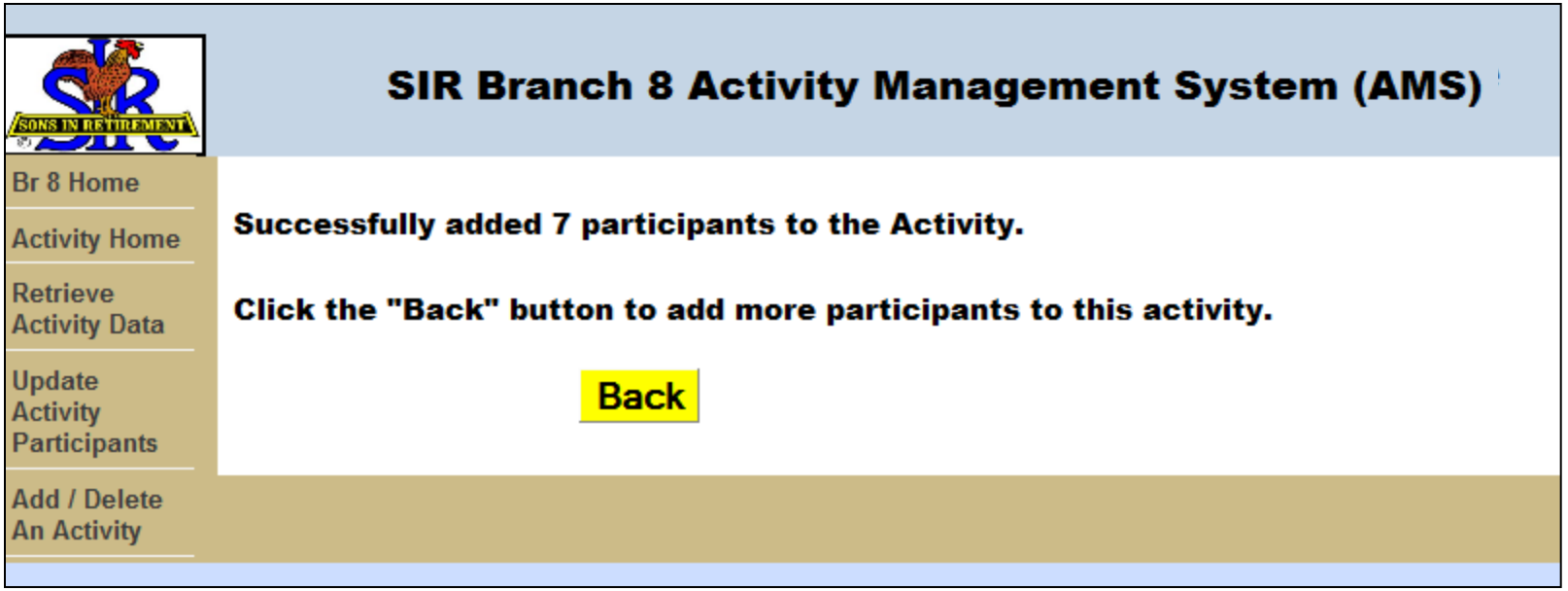
Note 2: The activity chairs, co-chairs, and other officers may have already been added by the activity coordinator. Their names will not be on the selection list.

2. Click "Submit" when you are done.

Note 1: Use [Ctrl]+[Click] to select multiple members. If you miss some members, go back to this page and add the rest.

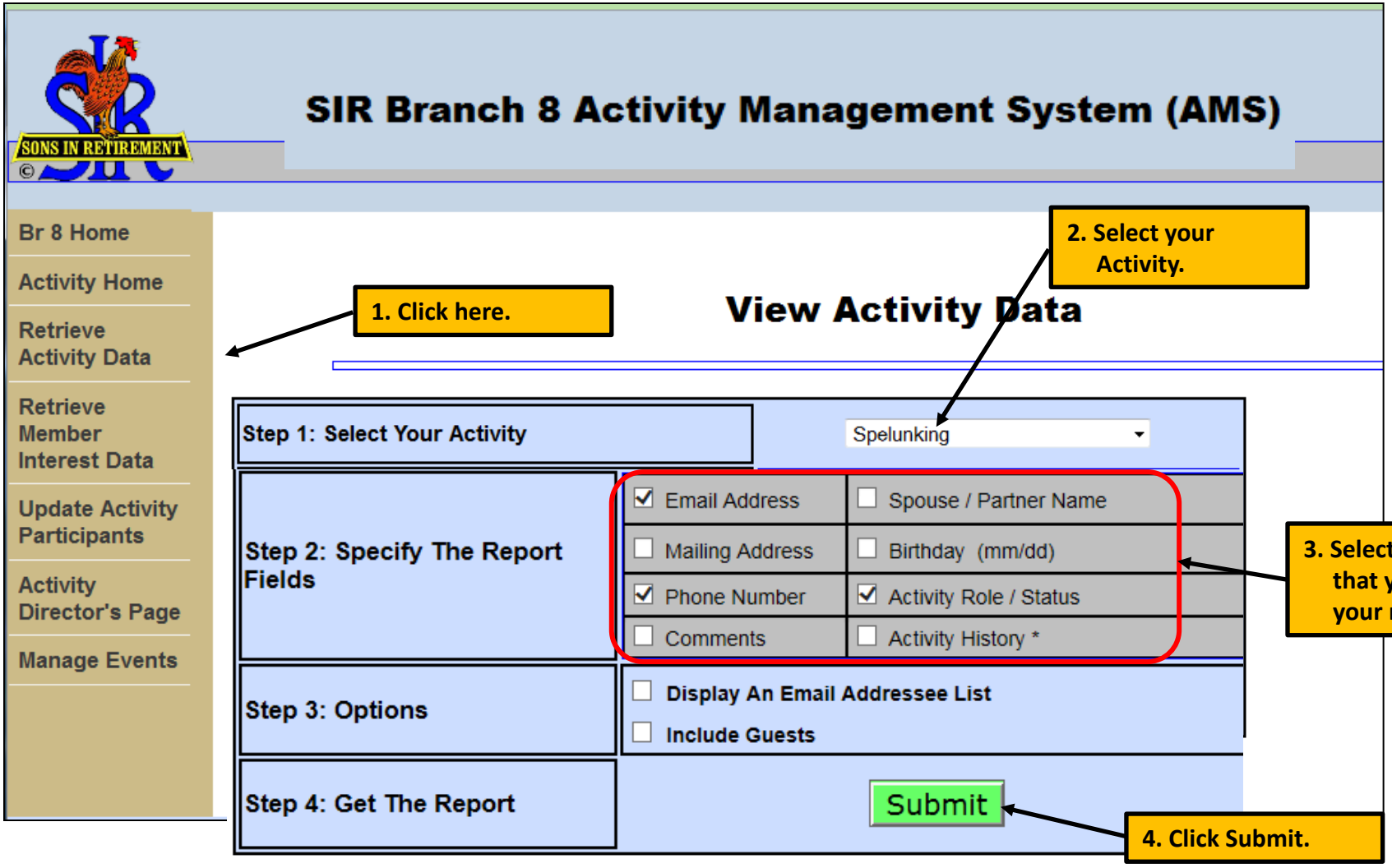
Activity Membership Management

Creating Your Membership List (03 of 3)



Activity Membership Reports (01 of 5)

Get A List Of Your Activity Members



Activity Membership Reports (02 of 5)

Report Example (Test Data, not to be believed)

Activity Participants For Spelunking

Back

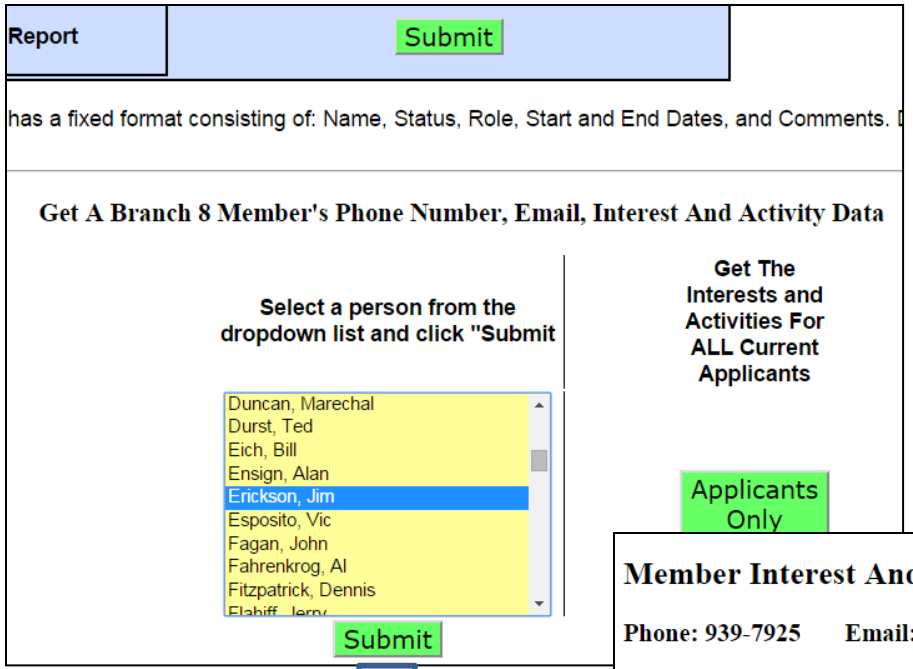
Name	Phone	eMail	Address	Status	Role
Bob Barnes	686-0106	bob_barnes@msn.com	3901 Dana Ct. Concord, CA 94519	Active	Member
Ed Benson	943-7011	ebensonbwa@aol.com	1289 Crown Ct. Walnut Creek, CA 94597	Active	Member
Bill Douglas	945-8009	bdoug33@aol.com	3173 Valley Vista Road Walnut Creek, CA 94598	Active	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



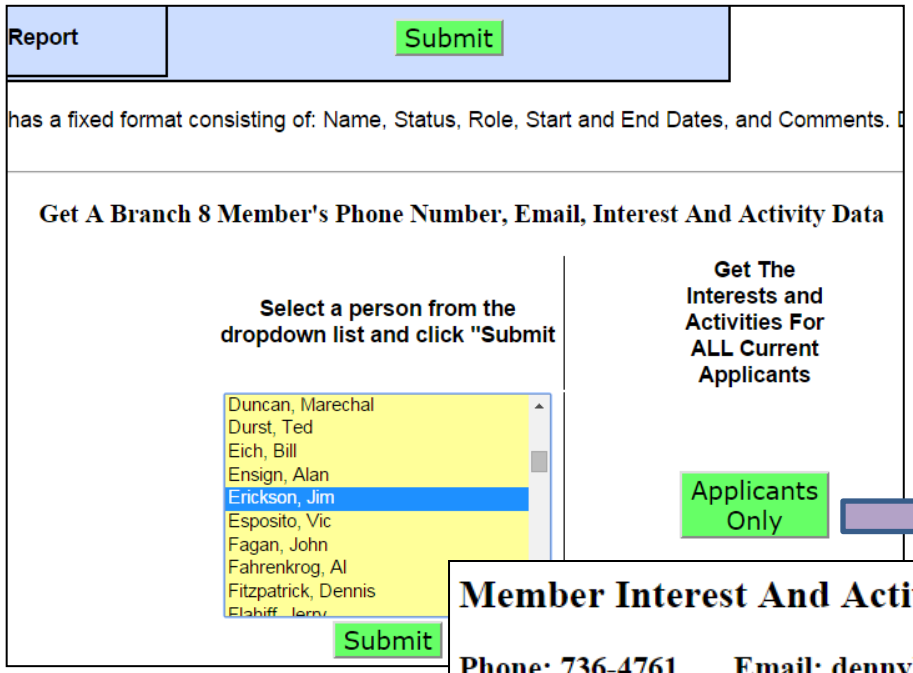
Note, this feature will display "Roster" information on any active Branch 8 member, including members not in your activity.

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



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**

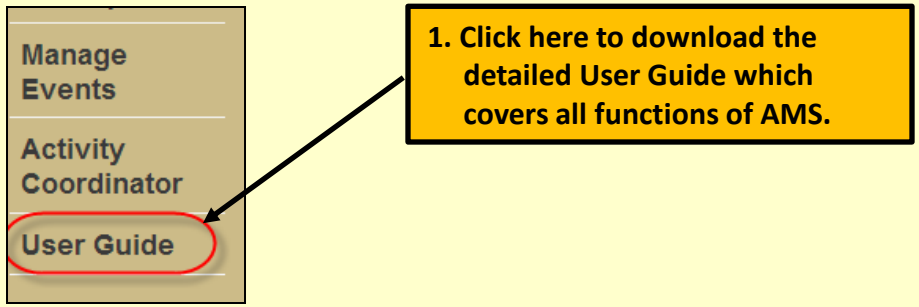
INTERESTS		ACTIVITIES			
Rank	Interest	Activity	Start Date	Role	Status
1	Golf 18 Hole				
2	Sirs In The Kitchen				
3	Hikers				
	.Bocce Ball				
	Book Group				
	Bowling				
	Computers				
	Golf Couples				

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?