The English-Speaking Union
English in Action

ON-LINE MEMBERSHIP ROSTER USERS GUIDE

As part of the Direct Billing Services that Headquarters provides on behalf of Branches, the current membership roster for your Branch is available to Branch Presidents and designates on the ESU secure server. The password-protected roster is extracted directly from the national database and is available in two formats:

1) as a PDF Report, which provides information in a format that is easy to browse on screen and is suitable for printing.
2) as an Excel spreadsheet, which enables you to extract, reorder and update the information.

The On-Line Membership Roster provides Branches with current membership information in a timely manner. Using the Excel spreadsheet, Branches can create *ad hoc* views and reports, submit changes and updated membership information electronically to Headquarters and print membership directories and other materials to support member communications and recruitment activities.

It is our policy at National Headquarters to provide the password for accessing the On-Line Membership Roster to the Branch President only. The Branch President can then provide the address of the Roster on the server and the password to any other Branch officers as necessary. The Branch President can request a new password at any time.

We hope you find that the On-Line Membership Roster simplifies membership record keeping and helps improve the timely and accurate exchange of membership information among your Branch officers and between your Branch and Headquarters.

How to access the PDF Roster

The PDF Roster is currently unavailable in the online format. However, an updated version can be requested from Headquarters at any time by emailing or calling Kathy Morrisett (contact info below)

How to access the Excel Roster

To access the Excel Roster, enter the following web address into your Web Browser, replacing "yourbranchname" with your branch name. Please note that some branch names have been shorten or altered to fit so please contact Kathy Morrisett (contact info below) if you are unsure of yours.
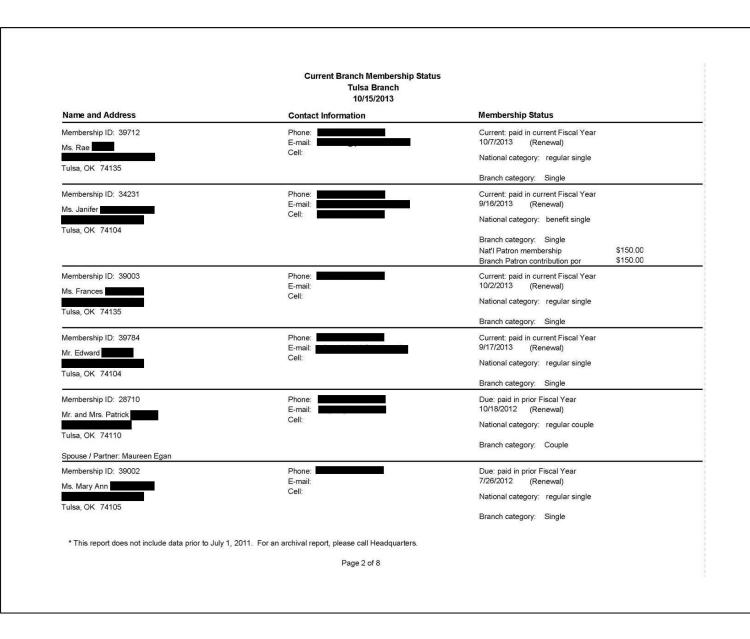
www.esuus.org/branchresources/roster**yourbranchname**.xls

Once completely typed in, hit enter and your computer will automatically launch Excel and prompt you to enter the password. Once you enter the correct password, the roster will open.

Description of PDF roster layout

The PDF roster presents membership information in three columns:

1. Name and Address
2. Contact Information
3. Membership Information
   - Membership Status (Current or Due)
   - Date of the members' last dues or gifts payment / New or Renewing Member
   - National Category
   - Branch Category
   - Patron or Gift Contributions amount

Current Branch Membership Status
Tulsa Branch
10/15/2013

Name and Address	Contact Information	Membership Status
Membership ID: 39712 Ms. Rae ▮▮▮▮ ▮▮▮▮▮▮▮▮▮▮▮▮ Tulsa, OK 74135	Phone: ▮▮▮▮▮▮▮▮ E-mail: ▮▮▮▮▮▮▮▮▮▮ Cell:	Current: paid in current Fiscal Year 10/7/2013 (Renewal) National category: regular single Branch category: Single
Membership ID: 34231 Ms. Janifer ▮▮▮▮▮▮ ▮▮▮▮▮▮▮▮▮▮▮▮ Tulsa, OK 74104	Phone: ▮▮▮▮▮▮▮ E-mail: ▮▮▮▮▮▮▮▮▮ Cell: ▮▮▮▮▮▮▮	Current: paid in current Fiscal Year 9/16/2013 (Renewal) National category: benefit single Branch category: Single Nat'l Patron membership $150.00 Branch Patron contribution por $150.00
Membership ID: 39003 Ms. Frances ▮▮▮▮▮▮ ▮▮▮▮▮▮▮▮▮▮▮ Tulsa, OK 74135	Phone: ▮▮▮▮▮▮▮ E-mail: ▮▮▮▮▮▮▮ Cell:	Current: paid in current Fiscal Year 10/2/2013 (Renewal) National category: regular single Branch category: Single
Membership ID: 39784 Mr. Edward ▮▮▮▮▮ ▮▮▮▮▮▮▮▮▮▮▮ Tulsa, OK 74104	Phone: ▮▮▮▮▮▮▮ E-mail: ▮▮▮▮▮▮▮▮▮ Cell:	Current: paid in current Fiscal Year 9/17/2013 (Renewal) National category: regular single Branch category: Single
Membership ID: 28710 Mr. and Mrs. Patrick ▮▮▮▮ ▮▮▮▮▮▮▮▮▮▮▮ Tulsa, OK 74110 Spouse / Partner: Maureen Egan	Phone: ▮▮▮▮▮▮▮▮ E-mail: ▮▮▮▮▮▮▮ Cell:	Due: paid in prior Fiscal Year 10/18/2012 (Renewal) National category: regular couple Branch category: Couple
Membership ID: 39002 Ms. Mary Ann ▮▮▮▮▮▮ ▮▮▮▮▮▮▮▮▮▮▮ Tulsa, OK 74105	Phone: ▮▮▮▮▮▮▮ E-mail: Cell:	Due: paid in prior Fiscal Year 7/26/2012 (Renewal) National category: regular single Branch category: Single

* This report does not include data prior to July 1, 2011. For an archival report, please call Headquarters.

Description of Excel Roster - Columns A through G

Column A: <u>Membership ID Number</u> - National Membership ID Number maintained by headquarters

Column B: <u>Membership Name</u> - Formal title. Can be used to address labels, invitations, etc…

Column C: <u>National Membership Category</u> - Membership as it's recorded at the national level

- Regular Single or Couple
- National Patron Single or Couple
- Younger Single or Couple
- Prospect (Potential Members can be added to your roster)
- Honorary Member

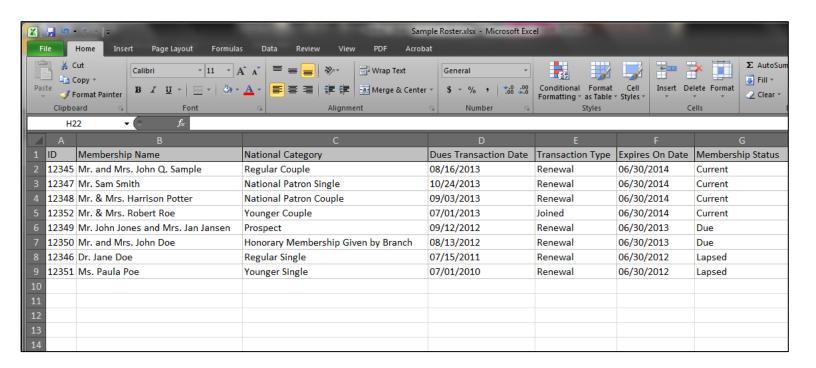Column D: <u>Dues Transaction Date</u> - Date of the members' last dues or gifts payment

Column E: <u>Transaction Type</u>

- Joined - New member this membership year
- Renewal - Renewing member from last year
- Rejoined - Member rejoined after missing at least one full membership year

Column F: <u>Expires on Date</u> - This is the date the membership expires.

Column G: <u>Membership Status</u>

- Current - Has fully paid dues
- Due - Has not paid dues for current membership year
- Lapsed - Has not paid dues for at least one full membership year.

ID	Membership Name	National Category	Dues Transaction Date	Transaction Type	Expires On Date	Membership Status
12345	Mr. and Mrs. John Q. Sample	Regular Couple	08/16/2013	Renewal	06/30/2014	Current
12347	Mr. Sam Smith	National Patron Single	10/24/2013	Renewal	06/30/2014	Current
12348	Mr. & Mrs. Harrison Potter	National Patron Couple	09/03/2013	Renewal	06/30/2014	Current
12352	Mr. & Mrs. Robert Roe	Younger Couple	07/01/2013	Joined	06/30/2014	Current
12349	Mr. John Jones and Mrs. Jan Jansen	Prospect	09/12/2012	Renewal	06/30/2013	Due
12350	Mr. and Mrs. John Doe	Honorary Membership Given by Branch	08/13/2012	Renewal	06/30/2013	Due
12346	Dr. Jane Doe	Regular Single	07/15/2011	Renewal	06/30/2012	Lapsed
12351	Ms. Paula Poe	Younger Single	07/01/2010	Renewal	06/30/2012	Lapsed

Description of Excel Roster - Columns H through M

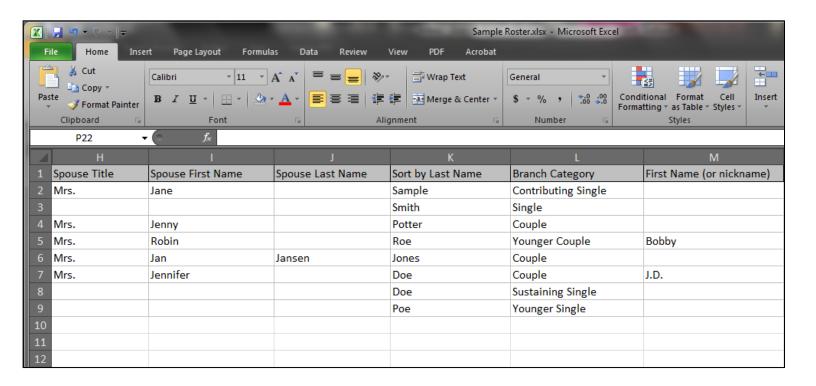Column H: <u>Spouse Title</u>

Column I: <u>Spouse First Name</u>

Column U: <u>Spouse Last Name</u> - If different than primary member

Column K: <u>Sort by Last Name</u> - Allows you to sort alphabetically by membership last name

Column L: <u>Branch Category</u> - Members' local Branch membership level or category. These are different for each Branch.

Column M: <u>First Name (or nickname)</u> - Primary member's first name (or nickname) if different than their formal title (see column B)

	H	I	J	K	L	M
1	Spouse Title	Spouse First Name	Spouse Last Name	Sort by Last Name	Branch Category	First Name (or nickname)
2	Mrs.	Jane		Sample	Contributing Single	
3				Smith	Single	
4	Mrs.	Jenny		Potter	Couple	
5	Mrs.	Robin		Roe	Younger Couple	Bobby
6	Mrs.	Jan	Jansen	Jones	Couple	
7	Mrs.	Jennifer		Doe	Couple	J.D.
8				Doe	Sustaining Single	
9				Poe	Younger Single	
10						
11						
12						

Description of Excel Roster - Columns N through V

Column N: <u>Address Line 1</u>

Column O: <u>Address Line 2</u>

Column P: <u>City</u>

Column Q: <u>State</u>

Column R: <u>Zip</u>

Column S: <u>Primary Phone</u>

Column T: <u>Email Address</u>

Column U: <u>Additional Email Address</u>

Column V: <u>National Patron Level</u> - *Please note that this data is currently unavailable on the Excel Roster. This column will remain blank until we can fix the problem. You can determine a members' Patron Level by referring to the Branch Reimbursement Reports that are mailed out monthly.*

	N Address Line 1	O Address Line 2	P City	Q State	R Zip	S Home Phone	T E-mail	U Additional E-mail	V National Patron Level
1	Address Line 1	Address Line 2	City	State	Zip	Home Phone	E-mail	Additional E-mail	National Patron Level
2	123 Sample St.		Springfield	MA	12345	123-555-1234	sample.email@gmail.com		
3	Univ. of Springfield	123 Sample St.	Springfield	MA	12345	123-555-1234	sample.email@gmail.com	sample.email2@yahoo.com	
4	123 Sample St.		Springfield	MA	12345	123-555-1234	sample.email@gmail.com		
5	123 Sample St.		Springfield	MA	12345	123-555-1234	sample.email@gmail.com		
6	123 Sample St.		Springfield	MA	12345	123-555-1234	sample.email@gmail.com		
7	123 Sample St.		Springfield	MA	12345	123-555-1234	sample.email@gmail.com	sample.email2@yahoo.com	
8	123 Sample St.		Springfield	MA	12345	123-555-1234	sample.email@gmail.com		
9	123 Sample St.		Springfield	MA	12345	123-555-1234	sample.email@gmail.com		
10									
11									
12									
13									
14									

How to use the Excel spreadsheet roster

The Excel spreadsheet is interactive and flexible, unlike the static PDF document. The data in the spreadsheet can be arranged in different ways according to how you want to view it. For example, you can re-order ("Sort") the roster by "Membership Status" which will group members based on their current status.

Some other ways you can sort the information are:

- alphabetically by member last name;
- by membership category (single, couple, younger single, etc.);
- by transaction date;

Additionally, you can extract membership information from the Excel spreadsheet to an MS Word merge document to create Branch directories, mailing labels, personalized letters, name tags, lists for taking attendance at events, etc.

How to Report Updates to HQ

To send Headquarters corrections and updates for member contact information—street, zip code, phone, e-mail, etc.—enter the information in the Excel file in red type face (or simply highlight the cell), save the file with a the name "yourbranchname - rosterupdate - date" and e-mail to Membership Secretary Kathy Morrisett at kmorrisett@esuus.org.

In addition to accurate member zip codes, for instance, we also want our member database to reflect member preferences for forms of address, for example if a couple membership does not use —Mr. and Mrs. titles. Please forward any such information to us in the Excel document as well.

Receiving updates via the Excel document is much more efficient and introduces no new errors. IF you are unfamiliar with Excel, you can mark up your changes clearly on the PDF document, and send it to us via snail mail or fax.

New Memberships can be sent to headquarters using the New Membership Form (available on the branch resources page at www.esuus.org) if not re

Please submit new memberships with payment directly to Kathy Morrisett. A New Membership Form is available on the branch resources page at www.esuus.org).

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