MEMBINFO USER GUIDE

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Installation

WHAT'S NEEDED?

To run Membinfo three software items are needed.

> Microsoft Windows version 9, 10 or 11
> Microsoft Access 2016 (full version) or Microsoft Access Runtime 2016, and
> Membinfo.exe self extracting archive file

Microsoft Access (MS Access) is the database system used to store data files. There are two versions of MS Access that may be used. The full version is recommended as the the runtime version is only viable in particular circumstances.

Membinf.exe has several folders for the full Access version, the runtime version, a developers version and the user guide.

HOW TO GET THE SOFTWARE

MsAccess Full Version

The full version provides all the features needed to develop and run a database application and has to be purchased from Microsoft or a reseller. It is included in the Microsoft Office grant available to Not-for-profit organisations but is not included in the standard Microsoft Office 365. Membinf is developed on the MS Access 2016 full version.

MS Access Runtime

The runtime version is available from Microsoft for for free but it has limitations. It can only run an existing application (like Membinfo) and cannot be used to develop new database applications or make changes. There are compatibility limitations that may prevent its use. Other versions of the runtime (other than 2016) are available but are incompatible with 2016 applications.   It will not install on a PC that has a mix of 32 bit and 64 bit applications already installed. However Membinfo will run on either 32 bit or 64 bit. If a full version of Access is already installed do not install the runtime version over it. The free version is available here:

https://www.microsoft.com/en-us/download/details.aspx?id=50040

Membinfo.exe

Membinfo.exe can be downloaded from the GitHub software repository. GitHub ensures the safety of the software. It can be downloaded from the link below.

https://github.com/WazzaMac/Membinfo

Pull down the green Code dropdown and click Download ZIP. Unzip the Membinf-main.zip file. The Membinfo.exe archive file will be in the folder Membinfo-main.

DEPLOYMENT

There are three steps to deploy and run Membinfo Members Register.

1. Install MS Access runtime 2016 or full version
2. Download the Membinfo zip file and unzip it
3. Optionally copy a shortcut on the desktop.

The MS Access runtime is installed according to Microsoft instructions. Once installed it will appear on the Application menu however clicking on it will only result in a blank screen. The membinfo file has to be installed first. The application will open by clicking on the Membinfo application file.

Membinfo can be installed and run from any folder however it is recommended to avoid installing it in any folder that will be automatically uploaded to Sharepoint. It will not run from Sharepoint and a separate backup process is recommended. The recommended location is directly under the drive letter, e.g. C:\. This location is easy to locate, avoids unwanted duplication and is easy to back-up.

Copy the Membinfo.exe archive file to C: and double click to expand it. The full Access version application file will be in the C:\MembersRegister\Database (Membinfo.accdb). The runtime database file will be in C:\MembersRegister\Runtime folder (Membinfo.accdr). The developers version will be in C:\MembersRegister\Developer (MembersRegister\Membinfo_dev.accdb. The developers version has access to the ribbon and side bar. The other versions have them hidden.

There is also a shortcut in the C:\MemberRegister\Database and C:\MemberRegister\Runtime folders and user Guide in the C:\Membinfo\Documentation folder. The Membinfo application will create additional output folders as and when needed.

Note 1: The runtime version may display a security notice when opened. This is an unfortunate feature of the free version and is difficult to remove.

Note 2: Some deployment methods use a split database with a different front end and back end. This option has not been used because the runtime version does not allow split databases and splitting may complicate further development. The most straight forward deployment has been used for simplicity.

Running Membinfo

To run Membinfo either click on the shortcut or click on the database file. Click Membinfo.accdb for the full version or Membinfo.accdr for the runtime version.
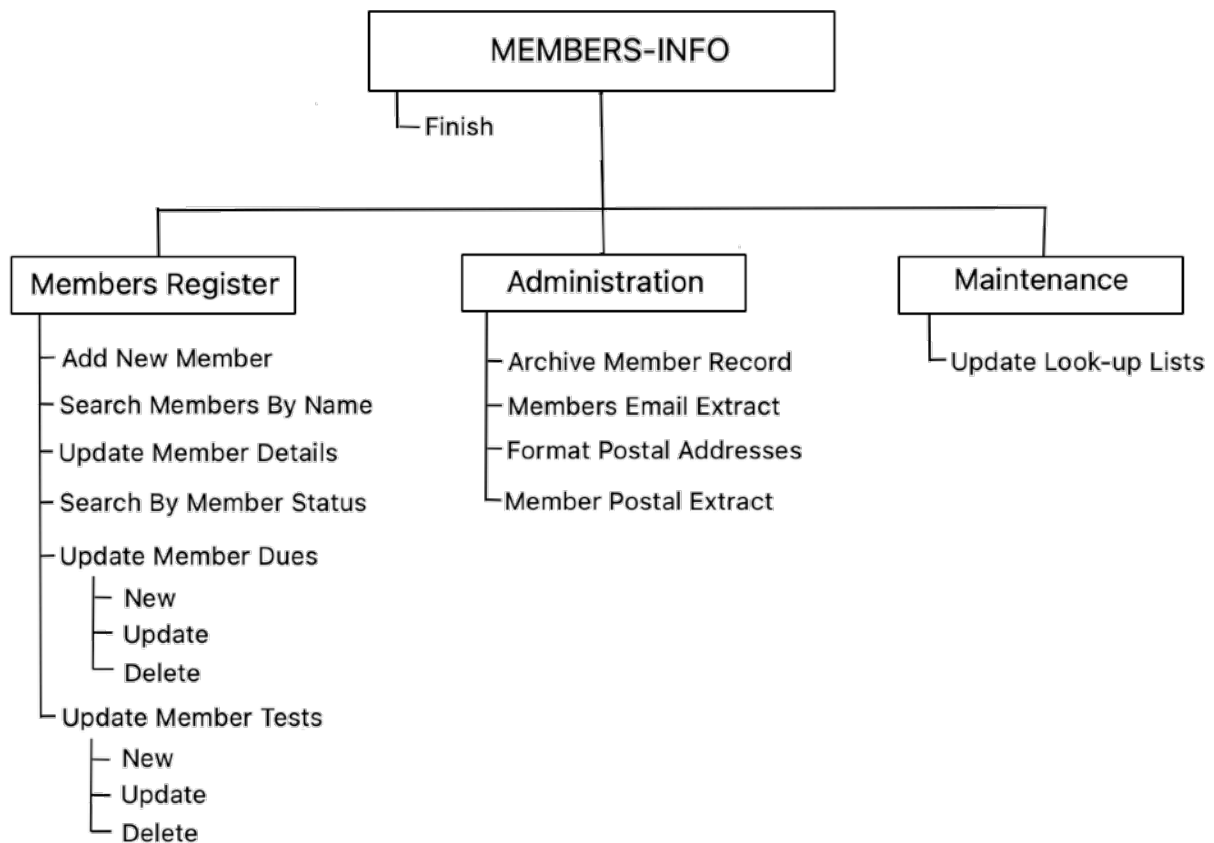
Other Deployment Options

Membinfo can be installed on a laptop or an external USB drive. In the case of a USB drive a shortcut may not always work.

Users Guide - Overview and Use Cases

MembInfo was developed as an information management tool for the Secretary of a Men's Shed. Typically the secretary of a Not-or-profit organisation is responsible for maintaining a register of members, along with other duties such as correspondence. The requirements were developed based on ten years experience. The use cases are for a Members Register that reduces the manual effort in searching through records and sending routine correspondence.

OVERVIEW

```
                          ┌──────────────────────┐
                          │    MEMBERS-INFO      │
                          └──────────────────────┘
                            └─Finish

   ┌────────────────────┐   ┌────────────────────┐   ┌────────────────────┐
   │  Members Register  │   │   Administration   │   │    Maintenance     │
   └────────────────────┘   └────────────────────┘   └────────────────────┘
     ├ Add New Member         ├ Archive Member Record   └ Update Look-up Lists
     ├ Search Members By Name  ├ Members Email Extract
     ├ Update Member Details   ├ Format Postal Addresses
     ├ Search By Member Status └ Member Postal Extract
     ├ Update Member Dues
     │   ├ New
     │   ├ Update
     │   └ Delete
     └ Update Member Tests
         ├ New
         ├ Update
         └ Delete
```

USE CASES - MEMBERS REGISTER

Add New Member

Prerequisites: Look-up Lists are up to date
New members application is completed and membership approved.
All mandatory data is readily available

Actor: Secretary or delegate

Scenario: A member's mandatory data is entered and saved in the register.

Search Members By Name

Prerequisites: Member has been added to register
Name is known

Actor: Secretary or delegate

Scenario: A member is found and selected to view details, update details,
update dues, update tests or archive record.

Update Members Details

Prerequisites: Member has been added to register
Discretionary data is readily available

Actor: Secretary or delegate

Scenario: A member's discretionary data is entered and saved in the register.

Search By Member Status

Prerequisites: Members have been added to register

Actor: Secretary or delegate

Scenario: A list of members is found and one is selected to view details, update details,
update dues, update tests or archive records.

Update Member Dues

Prerequisites: Member has been added to register
Members dues or fees data is readily available

Actor: Secretary or delegate

Scenario: A members dues or fees data is entered, updated or deleted

Update Member Tests

Prerequisites: Member has been added to register
Members test requirements data is readily available

Actor: Secretary or delegate

Scenario: A members proficiency test data is entered, updated or deleted

USE CASES - ADMINISTRATION

Archive Member Record

Prerequisites: Member's record has been confirmed for archive or deletion

Actor: Secretary or delegate

Scenario: A members record is archived or permanently deleted.

Members Email Extract

Prerequisites: Email message is prepared and available

Actor: Secretary or delegate

Scenario 1: A list of members email addresses are extracted and written to a comma separated text file, to be copied and used as a To, Cc or Bcc address list.

Scenario 2: A list of members details are extracted and exported to a tab separated text file for use as a spreadsheet import file or general reference file.

Format Postal Addresses

Prerequisites: None

Actor: Secretary or delegate

Scenario: All street addresses are formatted to Postal standard.

Member Postal Extract

Prerequisites: Member has been added to register

Actor: Secretary or delegate

Scenario 1: A member's name and address is extracted and written to a text file, formatted for use in a DL window faced envelope.

Scenario 2: A member's details are exported to a text file, to be copied and used for post or emailing to the member with a request for updated details.

USE CASES - MAINTENANCE

Update Look-up Lists

Prerequisites: Look-up table list data are known

Actor: Secretary or delegate

Scenario: Look-up table is updated with current list data.

Navigation

Navigation to an input form is based on a simple hierarchy of tabs and menus. The tabs are organised into three workflows, working with the members register, working to correspond with members and working to maintain look-up lists.

Controls

Controls are limited to data input fields, look-up lists and and command buttons. No restrictions are placed on the data other than it must be of the required type, e.g. text, date, money or Yes/No. Data other than what appears on look-up lists can be entered.

Mandatory fields needed for the database to function correctly will be tested to determine if they are empty.   If a field is empty (null), a message will appear. A record cannot be saved unless mandatory fields have data entries. Any data value can be entered including "unknown".

On some forms the data is for display purposes only. Fields with a light blue background cannot be updated. Fields with a white background can be saved if there is a Save button.

Save Button

Data will be not be saved unless the "Save" button is clicked. This is to ensure no data is inadvertently recorded.

Cancel Button

Clicking the "Cancel" button will return to the menu without any further operations. Any data that has been previously saved will remain saved but data entered after a Save will be discarded without warning. Cancel is a safe way to view then exit a form without making any changes.

Close Button

The "Close" button operates differently to the Cancel button in that a warning will be given if there is unsaved data. The main function of the Close button is to record the current record. E.g. After a Search operation is "Closed" a pointer to the currently displayed record will be saved and that record will appear when any other form is opened. This method reduces the need to have multiple forms open at the same time.   This feature applies only to the Members Register tab. The Archive Member Record will open at the current record but will not save an archived or deleted record.

Navigation Buttons

The "arrow" buttons are used to move forward or backward a record at a time. Records will "wrap around" at the end of the file.

Archive Button

The "Archive" button will change the value of the hidden IsArchive data field to "Yes" and the record will no longer be displayed in the Members Register. It will continue to be displayed in the Members Admin form and the IsArchived flag can be changed manually within the form.

Delete Button

The "Delete" button will permanently remove the selected record. Confirmation be will requested prior to the deletion taking effect.

Note 1: Members Dues and Members Test records can be deleted immediately but Members Details records cannot be deleted if there are any related Dues or Test records. All related Dues and Test records must be deleted before hand. This feature is needed to retain data integrity.

Note 2: If an archived members Details record has related Dues or Test records it cannot be deleted but the record no longer appears in the members register and the related records cannot be deleted. The Members Details record must first be un-archived manually and then the related records can be display for deletion.

Email Extract Button

The "Email Extract" button initiates a program to extract email addresses and write them to a text file.

Data Export Button

The "Data Export" button initiates a program to extract members details and write them to a text file.

Address Button

The "Address " button initiates a program to extract a members street addresses and write it to a text file.

Details Button

The "Details" button initiates a program to a members details write them to a text file.

Finish Button

The "Finish" button closed the current database application (Membinfo) and the database system.

MEMBERS REGISTER - MANDATORY DATA FIELDS

These fields are mandatory because they are needed to produce information correctly and for the the database to function efficiently.

Member Number

A unique, automatically generated number that provides an anonymous reference to a member's details. The number is typically used in various situations, e.g. payment receipt numbers, official documents, labelling of materials and equipment, social day lottery.

Membership Type

Membership Type indicates the basis on which a person is deemed to be a member. Commonly used membership types are:

Affiliate - A person who has applied for membership and subsequently elected by a quorum of committee members.

Associate - A person who is granted membership as a result of an agreement with another organisation.

Honorary Life - A person who is elected to membership until death and exempted from dues.

Honorary Term - A person who is granted membership for a specified period and exempted from dues during that period.

Date Approved

The date a new member's application is approved or their membership acknowledged.

First Name

The familiar name or first given name of the members legal identity - non-capitalised.

Note: Non-capitalised means only the first letter of a proper noun is upper-case and the remainder is lower-case.

Surname

The family name or last name of the members legal identity - non-capitalised.

Date of Birth

The date of the day on which the member was born - dd/mm/yyyy.

Sex

The biological gender of the member.

Street Address

The first line of the members residential address, consisting of a number(s), name and suffix - non-capitalised. I.e unit/house number, street/road/avenue name, Street/Road/Avenue suffix.

Note: building, estate and house names are optional depending on available space.

Town

Part of the second line of the members residential address consisting of the capitalised city/town/suburb name.

State

Part of the second line of the members residential address consisting of a capitalised abbreviation of their state.

Postcode

The four digit number used by postal services to route mail.

Mobile Phone

The members personal mobile phone - nnnn nnn nnn.

Landline

The members residential phone with area code - nn nnnn nnnn.

Email Address

The members preferred email address for routine correspondence.

Membership Status

Membership Status indicates a members privileges (rights). Privileges are granted, suspended, reinstated or revoked as a result of a transaction between a member and the committee or office holder, i.e. President, Vice President, Treasurer, Secretary. The transaction may be non-financial by way of a grant of privileges e.g. an honorary membership or the transaction may be financial, by way of payment of dues or fees. Privileges and official transactions are typically defined by a constitution, charter or membership rules.   Commonly used indicators are:

Pending - Privileges are revoked until a new membership application is approved.

Current - Privileges are granted as a result of an offical transaction.

Lapsed - Privileges are revoked but may be reinstated as a result of an offical transaction.

Expired - Privileges are revoked until an existing membership is re-approved.

Resigned - Privileges are revoked at the request of member.

Deceased - Privileges are revoked at as a result of the death of member.

Suspended - Privileges are revoked and cannot be reinstated.

Financial Status

Financial Status indicates a member's credit/debit position.   Their credit/debit position is a result of payment/non-payment of valid charges. Dues are recurrent charges related to the cost of providing member privileges. Fees are charges related to the cost of administration. Charges are typically payable between a due date and a past-due date. Payment of past-due charges are often accepted during a period of grace, subject to late fees and/or suspension of members privileges.   Commonly used indicators are:

Financial - In credit as a result of payment in full of all levied charges.

Exempt - In credit as a result of no valid charges or charges being waived.

Arrears - In debit as a result of non-payment of one or more levied charges after a past-due date but before the end of a period of grace.

Non-financial - In debit as a result of non-payment of one or more levied charges after a period of grace.

Decedent - In credit as a result of a members death absolving them from payment.

MEMBERS REGISTER - DISCRETIONARY DATA FIELDS

These fields are used to record data that is primarily used for ensuring the safety and well being of a member.

Emergency Contact

The name of a person to be contacted in the event of an emergency.

Emergency Contact

The mobile number, landline number or any other telecommunication channel to be used in an emergency.

Medical Notes

The name of a medico, medical condition or pharmaceutical a member requests to be recorded for reference in the event of a medical emergency.

Main Interest

The activity, skill or subject that the member would like to participate in most of the time.

Other Interests

The activities, skill or subjects the member will participate in occasionally.

Is a Veteran

A Yes/No flag to record if a member has been issued a Gold or White card or not.

Preferred Name

The name or nick-name a member prefers to be addressed with.

Preferred MOC

The Method of Contact a member prefers to use for routine correspondence. Commonly preferred methods are email, mobile, SMD and landline.

Preferred MOP

The Method of Payment a member preferred to use to pay charges. Commonly preferred methods are cash, debit card, credit card, EFTPOS, BSB transfer, PayID, PayPal, Google Pay, ApplePay

Internet Link

Any hashtag or Universal Resource Locator (URL) a member has made publicly available for social media or Internet based information. Typically used to share information about activities and skills with other members.

Member Notes

A general purpose, long data field for recording any information useful for the welfare of the member.

Next Review Date

A date set for the review and update of a members details or a date set to sentence records to archive.

MEMBERS REGISTER - HIDDEN DATA FIELDS

Hidden data fields are needed for administrative purposes and accessible only via the Administration tab.

IsArchived

A Yes/No flag to record if a members data is retained in the membership data table but hidden from display in the Members Register tab.

Note1: Deleting genuine records is not considered the best practice for information management. As an alternative the record can be retained in the database but flagged so it will not be displayed in normal use or used in any reports or calculations. Typically a record is sentenced archived when it has not been used for seven years.

Note 2: A record should be deleted if it was created in error. A delete function is available via the Administration tab.

Date Last Updated

The last date any data field was changed and saved.

Note: This field is used for data integrity purposes and is available only via the Administration tab.

MembInfo Users Guide - Members Dues Data Fields

These fields are used to record the levy of a membership charge and any subsequent payment. They are not a replacement for an accounting system. They are limited to membership related transactions only and provide useful information for communicating with members and reconciling accounting journal entries. The main value is a full history of membership payments that may not be readily available in an accounting system. As per the Members Register data, and unlike an accounting system, the data is the property of the member.

Payment Type

The type of charge that was levied on the member.
Commonly used charges include (but not limited to) annual dues, joining fee, late fee, rejoining fee.

Amount Due

The value of the charge in dollars.

Is Paid

A Yes/No flag to record the receipt of a payment or not.

Amount Paid

The value of the payment receipts in dollars.

Date Paid

The date the payment was receipted.

MOP

The method of payment used.

Payee

The name of the person who made the payment.

Note: The payee name, as appears in an accounting system, credit card or EFTPOS transaction may be other than the name recorded in the members register. This field can provided a link between the name in a financial transaction system and the members register and thus reduce mis-identification.

Receipt Reference

The reference number or identifier on the official receipt.

Note: The Members Number in the Members Register could be used as part of an official Receipt number and thus provide a link to an accounting system.

MembInfo Users Guide - Member Proficiency Test Data Fields

These fields are used to record any proficiency tests the member should undertake to ensure their own and other members safety. They are not a replacement for a Skills Evaluation system and do not record a method of evaluation or level of skill. By proficiency, it is meant they have been required to demonstrate they can safely operate the equipment and know the procedures for reporting any malfunction or maintenance requirement. The level of skill is not an issue here.

Equipment Type

The type of equipment the member should be proficient in operating.

Note: There are too many types of equipment to list here and the list will depend on what is available to the member. The required equipment list can be entered as a pick-list via the Maintenance tab.

Assessed

A Yes/No flag to record if the proficiency test has been performed and satisfactorily passed.

Test Number

A reference number used for indexing a list of test procedures or indicating that a test may have several parts.