

# Agenda

- Introduction of design and work flow objectives
- Overview support classifications
- Workflow examples & demonstration
  - Introduction of new member
  - Entry of funding receipts
  - Initiation of membership renewals
- Database Conversion
- Implementation Discussion

# Design Objectives

- Use existing concepts from the Access based system to retain familiarity.
  - Concept of the Member/Contact IDentifier (MCID)
  - Use existing database constructs of
    - Member/Volunteer
    - Funding
    - Correspondence
    - Time Entry (for volunteers)
- Integration of members, volunteers, volunteer mail utility and (eventually) bulk mail utility to use single database.
- Introduce data integrity checks to enforce data entry integrity.
- Provide flexible tools for management and reporting.
- Utilize GPL (free) software for all system components.
  - MySQL – database
  - PHP – programing language
  - HTML5 -web page construction
  - Javascript – page level field validation
  - Bootstrap – page layout
  - phpMyAdmin – database administration
  - LibreOffice

# New Functions Available

All with common user interface  
All available to access via multiple platforms  
All integrated with the same database  
All implemented with GPL software

- Membership Database
- Volunteer Database
- Generic Database Lookup

# Support Community Definitions

- Similar (but different) that used in Access system.
- Classifies supporter 'groups' or 'classes'

**Members** - supporters that provide scheduled funding payments.

**Volunteers** – supporters that provide scheduled funding payments AND contribute volunteer time in some capacity.

**Donors** – provide sporadic funding support and are usually organizations, groups, trusts.

**Contacts** – none of the above. This is the 'pool' of interested potential supporters available to be recruited into one of the other categories.

## User Levels – Membership Database

- User – all normal user functionality
  - Add new member
  - Maintain member information
  - Entry of new funding and correspondence records
  - Create reminders
- EDI user – User level plus Extended Donor Info menu items.
- Admin user – EDI user plus extended system administrative functions menu.

## User Levels – Volunteer Database

- User – all regular user functions including:
  - Entry of a new system user
  - Entry of a new volunteer
  - Update volunteer information
  - Maintenance of volunteer mailing lists
- Admin user – User plus
  - Sending email to list(s) and
  - Creation of new list

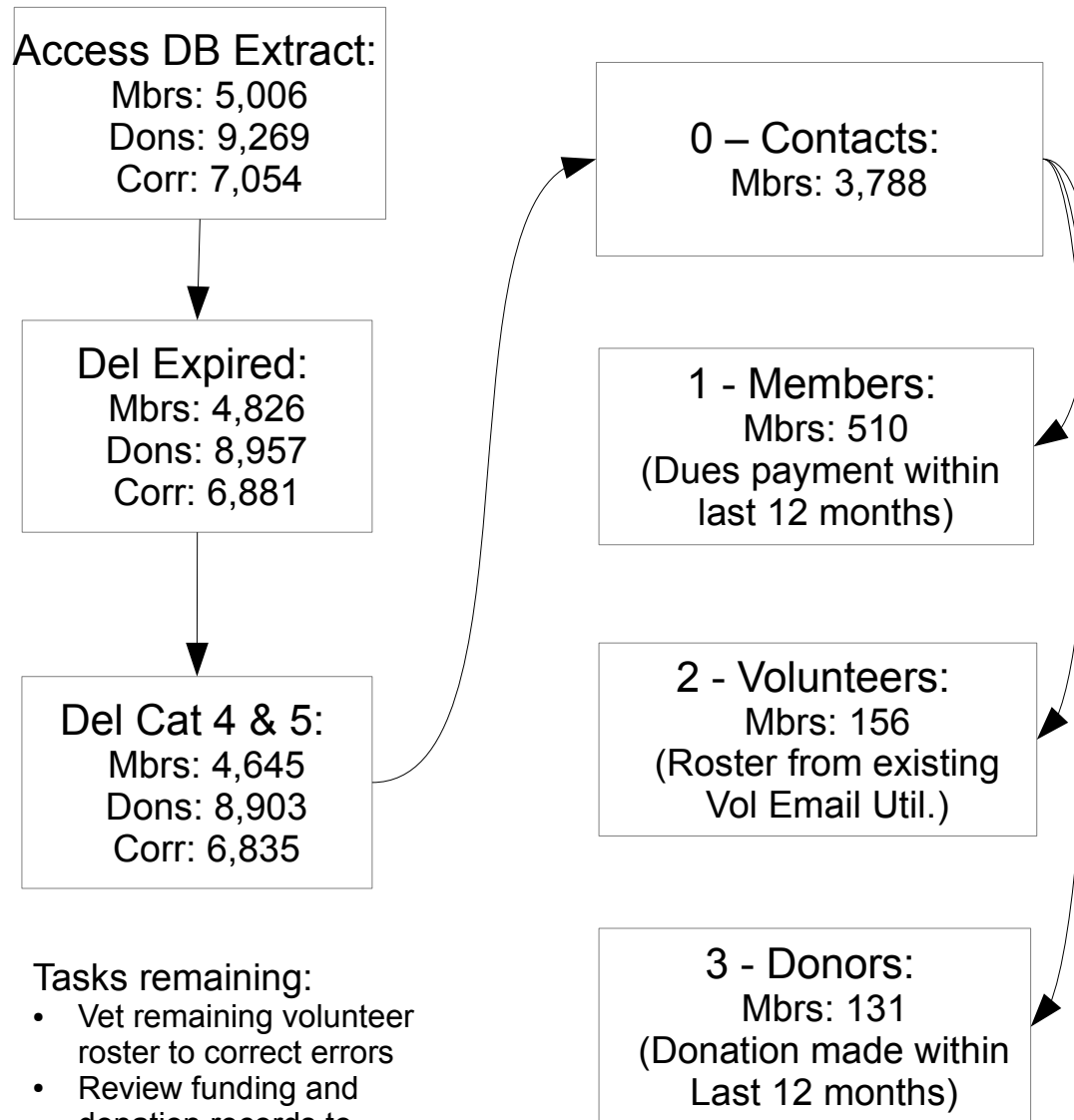
# Workflow examples & demonstration

Introduction of new member

Funding & Correspondence Entries  
(Dues, Donations, Letters, Postcards, Other)

Initiation of membership renewal(s)  
(Identify, email/mail notices, print labels/letters, reports)

# Database Conversion



## Tasks remaining:

- Vet remaining volunteer roster to correct errors
- Review funding and donation records to determine classifications

## Methodology

1. Extract all member, donation and correspondence records from Access database into a series of spreadsheets.
2. Format spreadsheets adjusting column names and values.
3. Set status of all records = 0.
4. Import spreadsheets into database.
5. Run database utilities to evaluate funding records to determine status values of 1 and 3.
6. Run database utility to merge vol email roster to determine status value of 2.