MbrDB Installation Guide

The following are the various configuration variables available to customize MbrDB to fit a specific organization.

The questions and information should be completed and updated in the system prior to official roll-out.

Test and Training Users

The MbrDB system utilizes 4 categories of users to provide optimal use of the system while providing security and accountability. The following are the user levels available:

- Administrator – this is an administrative user who is responsible for the overall operation of the system as well as to maintain the integrity of the database. Routine maintenance includes database backup, system table maintenance and user registration. All available functionality provided to other user levels are available to this user.

- EDI User – this is a user who is authorized to perform research and fund development activities. The user is provided with two extra menu items that allow the development user to make notes and perform follow up solicitations. (NOTE: this functionality requires extensive development under the direction of a professional Fund Development person.)

- User – the normal user is provided the functions needed to create and update membership information on the database. This includes the introduction of new member records, new funding records, new correspondence records and the ability to initiate renewal reminders to 'expired' memberships.

- Vol. User – this user security level is used by the volunteer interface to the membership database to manage those classified as volunteers. This includes time entry for volnteer service and bulk email services to various email distribution lists.

- Vol Administration – administrative security level for the volunteer interface that provides the ability to enter new members/volunteers, create new distribution lists and perform other administrative tasks.

Special logins are provided to allow access to a 'test' database for testing and educational purposes. Successful login will allow each user level to be examined. The default password is 'raptor'. Changes are made to the test data which can be easily restored whenever deemed necessary.

These logins are:

User ID	Role
demouser@mbrdemo.com	user
demosuperuser@mbrdemo.com	administrator
demoediuser@mbrdemo.com	Member development user
demovoladmin@mbrdemo.com	Volunter admin user
demovoluser@mbrdemo.com	Volunteer user

Authorized Users

Initial user identification and passwords must be defined for those that are intended to use the system.

The user id's listed will be registered with an initial password of 'raptor'. Each user is encouraged to change their password during their initial session.

User ID	Role

Roles available:

- user
- admin
- ediuser
- voladmin
- voluser

Period Length Definitions

The following definitions need to be reviewed and modified if the system default is not appropriate.

Membership Expiration Period

This is the number of elapsed months before a membership is considered to be expired.   After this period the member becomes listed as an 'Expired Member' and is eligible to be sent expirationn reminder notices. (System Default: 11 months)

Expiration Notification Period

The number of elapsed days between an MCID being sent an expiration notice and until it reappears on the expiration listing. (System Default: 30 days)

Inactive Member Period

The number of elapsed days from the 'Inactive Date' on a member record after which the member record and all associated funding and correspondence records may be deleted. (System Default: 90 days)

System Log Expiration Period

The number of elapsed days used to determine if log entries may be deleted. (System Default: 10 days)

Configuration Parameters

The following parameters are primarily used as reporting points in the system. The more detailed these definitions and relationships are the better information can be presented in the reports provided.

Membership Types

These types are presented in a drop down selection box on the main membership information form. These are NOT configurable. There are 4 member status choices:

Status	Definition
0	Contact: individuals or organizations who are not official supporters of the organization by whom are noted for potential support recruitment.
1	Member: registered financial supporter with the expectations of membership.
2	Volunteer: registered Member that also provides volunteer services
3	Donor: periodic financial supporter from an institution, organization, trust, business or agency with no expectation of membership.

Usually, the Member Type will further define the Member Status. By default, the Member Type is cross validated with the status to enforce the defined relationships. This is done by coding the 'Status' code at the start of the Type definition. The system defaults are:

Status	Type (Default definitions that are configurable)	Type Code
0	Rescuer (not a transporter)	0-Rescuer
	Proposed Member	0-Proposed
1	Individual or Family membership	1-IndorFamily
	Sr-Student Member	1-Sr-Student
	Lifetime Member (granted by Board of Directors)	1-LIFETIME
	Subscriber (contributions paid monthly)	1-Subscriber
2	Volunteer	2-Volunteer
	Volunteer Subscriber (contributions paid monthly)	2-VolSubscr
	Volunteer and Lifetime Mbr (granted by Board of Directors)	2-VolLifeTime:
3	Affiliate organization	3-Affiliate
	Public or Private Company	3-Company
	For-profit or non-profit Organizational entity	3-Org
	Government Agency	3-Agency
	Private Business	3-Business

	Veterinarian	3-Vet

Reports are created that will use these definitions to provide specific information regarding funding sources.

Funding Purposes

This field is found on the funding record and is the primary reporting point regarding the source of funds being received from the membership records. The 'Purpose' should be considered the very highest of the reporting categories. The define the gross categories of what the funding provided is to be used for by the organization.

The default Funding Purposes are:

Purposes (Default)	Definition	Purpose Code
Dues	Payment of annual membership dues	Dues
Donation	Unrestricted funding	Donation
Directed Donation	Restricted funding provided for a specific purpose	DirDon
In-kind Donation	Donation of goods or services of value	InkindDon
Grant	Restricted funding provided for a specific project that will require outcome reporting by the funding agency.	Grant
Fund Raiser	Funding provided during the course of a special event or presentation.	FundRaising
Program Income	Income generated by provision of services by the organization (educational talks, animal exclusion servies, etc.)	PrgIncome

Programs

These classifications are to be considered as secondary reporting criteria associated with each of the previously defined 'Purposes'. These designations will provide addition reporting details regarding the origin of the funding being provided.

Default Funding Programs defined with the previously defined associated Purposes are:

Purpose	Program Definition	Prog. Code
Dues	Annual Membership Subscribing Membership Other Dues	Dues-AnnualMbr Dues-Subscr Dues-Other
Donation	Unrestricted, unsolicited donation Donation given for an 'In Memorandum' Donation given for an 'In Honor Of' Other Donation	Don-UnResDon Don-IMO Don-IHO Don-Other
DirDon	Directed Donation Other-Directed	Dir-DirDonFunding Dir-Other
InkindDon	In-kind (Facility) In-kind (Food) In-kind (Medical) Other In-kind	Ink-Facility Ink-Food Ink-Meds Ink-Other
Grant	Grant Other Grant	Gra-GrantFunding Gra-Other
FundRaising	Event Ticket(s) Event Donation Appeal letter mailing resulting in a donation Fund raising sales Other Fund raising	Fun-Event Fun-Donation Fun-Mailing Fun-Sales Fun-Other
PrgIncome	Sales Educational Presentation Exclusion Program Equip Deposit Other Program Income	Prg-Sales Prg-EducPres Prg-ExclProg Prg-Deposit Prg-Other

Campaigns

These classifications are defined to allow identification of the various outreach and mailing programs used to generate funding for the organization. Campaign names should be created in a 'generic' manner: without any specific date for example. Reports for recurring fund raising events can be created based on dates ranges so defining a campaign name with a date associated is not needed.

Current Campaigns defined are:

Campaign	Description	Campaign Code
Mailed Notice	Payment made in response to a mailed notice	MailedNotice
Emailed Notice	Payment made in response to an emailed notice	EmailedNotice
Newsletter	Payment prompted from a newsletter	Newsletter
EOY Appeal	Payment prompted by a End of Year Appeal	EOYAppeal
Fund Our Vet	Payment prompted by a Fund Our Vet appeal	FundOurVet
Media	Payment prompted by viewing a media clip	Media
XmasCard	Payment prompted by Xmas card	XmasCard
Yogathon	Payment resulting in YogaThon	Yogath
WIW	Windows Into Wildlife Event	WIW
FOV	Fund Our Vet Appeal Program	FOV
Other	Note of any other campaign	Other

Correspondence Types

This list is the various type of correspondence originated by any outreach effort on the behalf of the organization. Keeping track of the contacts with the membership will allow better relationships to be established and maintained. The 'Type' column provides the contents of the drop down selection lists, the 'Corr. Code' is the database code recorded when that Type is selected and should not contain spaces.

Current System Defaults are:

Type	Description	Corr. Code
Mail Reminder*	Reminder mailed by form letter or postcard	MailReminder
Email Reminder*	Reminder emailed	EmailReminder
Renewal Thank You	Email or letter renewal thank you	RenewalTY
Donation Thank You	Email or letter donation thank you	DonationTY
New Member Thank You	Email or letter membership thank you	NewMemberTY
EOY Tax Receipt	Email or letter EOY tax receipt	EOYTaxRcpt
Xmas Card	Email or letter Xmas card	XmasCard
PV Postcard	PV postcard sent	PVPostcard
Tour Invitation	Tour invitation sent	TourInvite
Other	Other correspondence type	Other

*auto generated by the reminder function and can not be removed or changed

Volunteer Time Categories

Volunteer time categories are referenced in the volunteer portal of the membership database and are used to classify the type of volunteer effort being provided by the member. These category definitions are utilized by the time entry function and associated volunteer reports.

The 'Type' column defines the contents of the description in the selection list displayed when time entry is performed. The List Code is the database code used for this list. It must be 3-5 characters and be totally unique and identifiable with the Name from any other list code.

Name	**Description**	**Code**

Volunteer Email Distribution Lists

This table defines the various distribgtion lists that are to be provided by the Volunteer Email facility to provide communication with volunteer groups. The 'Name' is the name of the list that is provided in the Member Info Page 'Lists' tab (visible when the Member Type is '2-Volunteer'.) The List Acronym is the 3-6 character abbreviation used in the database to denote the list for an individual volunteer and should be totally unique and identifiable with the list name.

The process of sending email messages to these lists is a function of the volunteer portal.

Name	Description	List Acronym

Reminder Templates

These templates are used to create the basic body of a message to be sent to a member when their membership has expired. Multiple templates can be defined to support the sending of a series of reminder letters or emails seeking membership renewal.

Form Letter Templates

E-mail Templates