Agenda

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

Support Community Definitions

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 like donations or grants and are usually organizations, groups, trusts or other legal entities.

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

Design Objectives

- Use easy to understand references/ID's
  - Concept of the Member/Contact Identifier (MCID)
  - Use database groups consisting of
    - Member/Volunteer
    - Funding
    - Correspondence
    - Time Entry (for volunteers)
- Integration of members, volunteers, donors and contacts with associated funding and correspondence records in a single database.
- Page level data integrity checks to enforce data base integrity.
- Provide flexible tools and reports for management.
- Utilizes 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 – spreadsheet and word processing

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

Work Flow 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)