

NSBE ONLINE CHAPTER MANAGEMENT TOOLKIT

NSBE Online (NOL) is more than a membership database management system that provides features to the membership; it also provides a host of features to help aid our chapters in effectively managing the process of fulfilling our membership. These features are explained in this document.

How to Access Your Chapter Page

To access your chapter page, simply click on the “Membership” tab then follow the “My Chapter” link at the bottom of the page.

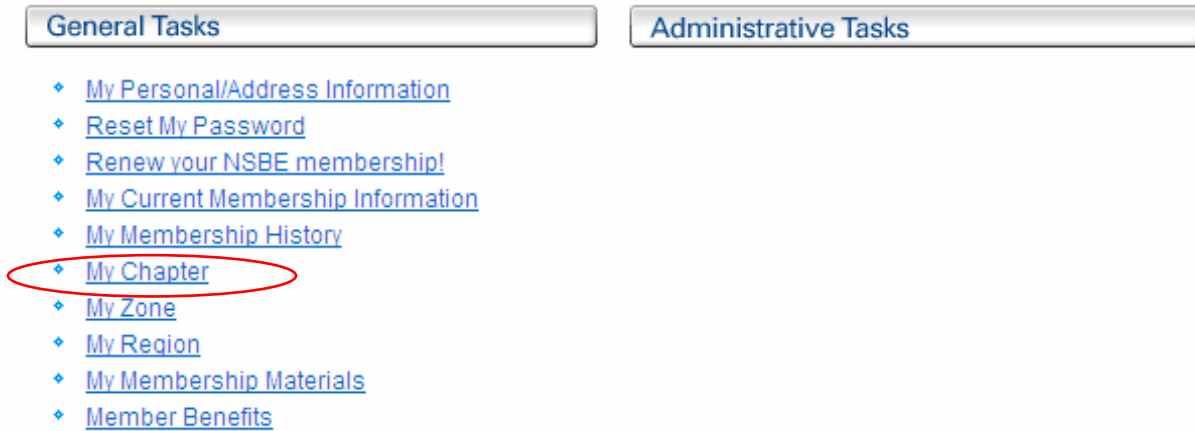


Figure 1. Bottom of the Membership Main Page

The Chapter Page

Below a view of the chapter page with some important features highlighted.

Chapter ID # → #1303 - AUBURN UNIVERSITY (AUBURN UNIV)
Chapter Name → #1303 - AUBURN UNIVERSITY (AUBURN UNIV)
Chapter Status → In Good Standing
Chapter Website → <http://auburn.edu/nsbc>
Scroll menu to view previous years → 2007-2008 Officers

Chapter Expires: Thursday, July 31, 2008
Active Term: From 7/31/2007 to 7/31/2008
Type: Collegiate
Status: Active

Link to update Officers → [\(update officers\)](#)

Individual Position Links →
President: Hill, Sidney
Vice President: Sylvester, Mr. Dionel
Treasurer: Wright, Millison
Secretary: Pugh, Mr. Kevin Jamal
Programs Chair: Echols, Jeremy
Senator #1: Harden Jr., William
Senator #2: Davis, Mr. Christopher O'Neal
Advisor (confirmed): Madsen, Dr. Nels
Dean (confirmed): Benefield, Larry

Chapter contact information →
108 Ramsay Hall
Auburn University
AUBURN, AL 36849 United States
Work: (205) 540-5167
Cell: (334) 444-3824
(flag as incorrect)
hillsid@auburn.edu

Zone: Primary Zone
Region: Region III

Active Members: [48](#)
Unpaid Members: [17](#)
Expired Members: [80](#)
Total # Members: [145](#)
Links to membership rosters

Other Information
Link to chapter constitution →
Constitution: [View the uploaded file. \(802 KB\)](#)

Figure 2. The Chapter Page

NOL chapter leader features

There are a host of features that NOL provides chapter leaders to in order to effectively manage your chapter. Some of these features include:

- Membership roster management
- Bulk Emailing
- Membership invoice payments
- Document Storage
- Event and Survey creation

If you are a chapter leader with the proper permissions, the links to these features will be located at the bottom of your chapter page (please see below.)

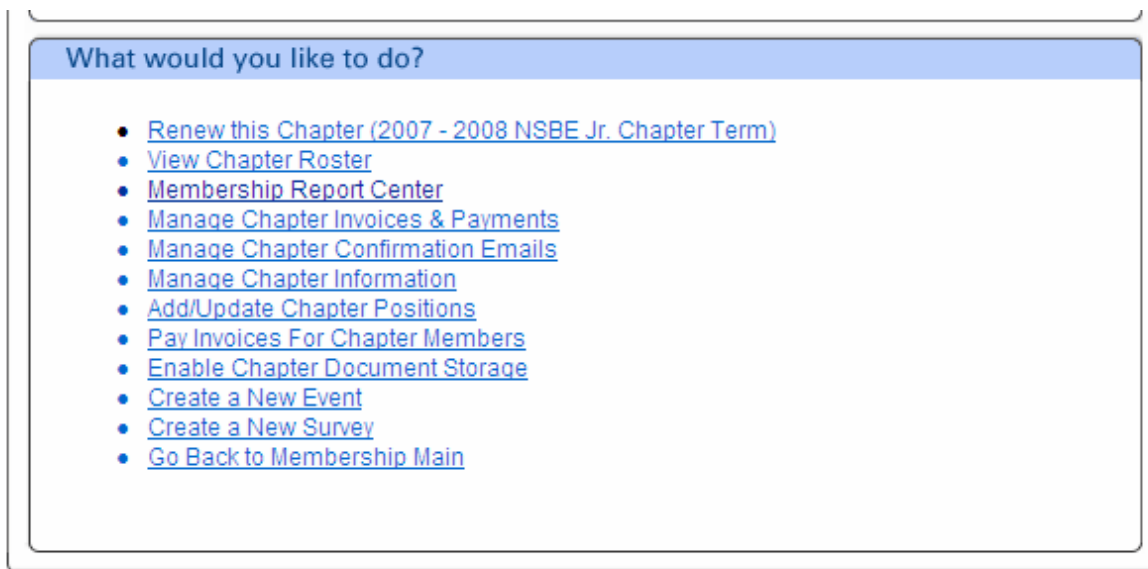


Figure 3. Chapter Leader Features (bottom of chapter page)

Renew this Chapter (Term renewing for (i.e. 2007 - 2008 NSBE Jr. Chapter Term))

This link only appears on your chapter page if you have yet to start the renewal process for the current NSBE fiscal year. **You must follow this link to complete your chapter's charter each year.** Following this link first takes you to the chapter information page (please see Manage Chapter Information) for updates. The next page is where you update your officers' information. Please note that you do not have to completely fill each officer position at this time, but your chapter will remain inactive until all required positions are filled. You can return later to continue updating your officer information by following the "Add/Update Chapter Positions link.


Chapter Renewal	
▶ Confirm Chapter Information ▶ Designate Officers ▶ Confirm Submission ▶ Completion	
Officer Designation	
Below is a list of chapter positions that you need to appoint members to. Positions in boldface are required - this chapter will not be in good standing until these officers are designated.	
Note: Only members active on Friday, April 11, 2008 will be considered as members.	
Name	Appointee
President:	--- Select a Member --- ▼
Vice President:	--- Select a Member --- ▼
Treasurer:	--- Select a Member --- ▼
Secretary:	--- Select a Member --- ▼
Membership Chair:	--- Select a Member --- ▼
Principal:	--- Select a Member --- Ceaser, Jazmine Guillory, Stephen Dewaine
Advisor:	First Name: <input type="text"/> Last Name: <input type="text"/> Email: <input type="text"/>

cancel X continue →


Figure 4. Officer Designation Page

View Chapter Roster

While the links to membership rosters provided on the chapter page are good, easy, and quick roster-filtering tools, they are limited to the situation described before them. The “View Chapter Roster” link is the second level roster-filtering tool that provides more criteria to search your membership database, such as membership status and a time stamp, while maintaining a very simplified format. You should play around with these features to get a fill for the possibilities that this link affords you.

President :	Fontenot, Mr. Brian Lee	
Vice President :	Creeks, Mr. Rasharrd Timothy	
Treasurer :	Richards, Joe	
Secretary :	Singleton, Ms. Kristine	
Principal :	Moore-Fontenot, Mrs. Susan	
Advisor :	Moore-Fontenot, Mrs. Susan	

Display Options

Show roster as of: 

Include the following: Active Expired Unpaid Pending Approval

Chapter Members

BAYTOWN NSBE JR. Members - 2 records. (390.63 milliseconds.)
Friday, April 11, 2008 at 3:32 PM EST

	Member ID	Member Name	E-Mail	Member Type	Active?
<input type="checkbox"/>	134936	Ceaser, Jazmine	cameeker@yahoo.com	NSBE Jr.	Yes
<input type="checkbox"/>	95727	Guillory, Stephen D.	s_guill1123@yahoo.com	NSBE Jr.	Yes

Select All Records

What would you like to do?

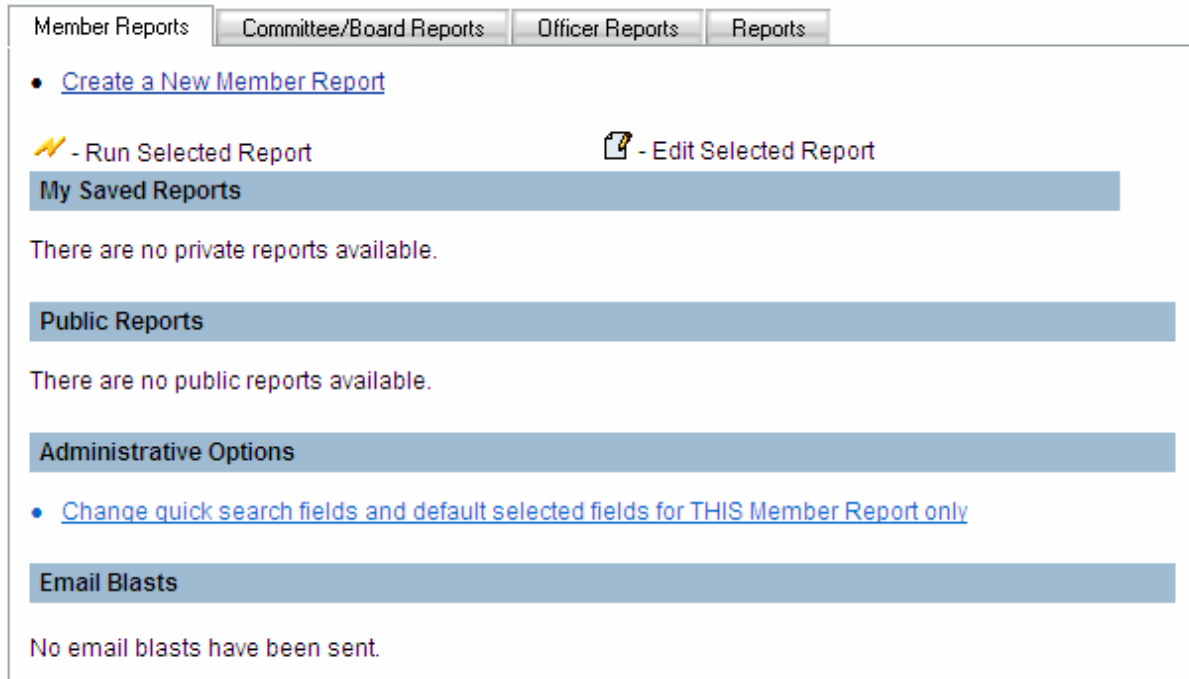
- [Make Payments for Selected Members](#)
- [Send an Email to Selected Members](#)
- [Go Back](#)

Figure 5. Chapter Roster Page

You can also make payments for or email the individuals on the list that you generate by utilizing the links at the bottom of the page.

Membership Report Center

The membership report center is the highest level roster-filtering tool that allows you to generate reports based on a host of criteria such as gender, grade/year, major, city, state, etc. The report center is the most complicated of the three tools, yet it provides seemingly endless possibilities to filter through your chapter's membership database and output multiple criteria.



The screenshot displays the Membership Report Center interface. At the top, there are four navigation tabs: "Member Reports" (selected), "Committee/Board Reports", "Officer Reports", and "Reports". Below the tabs, the main content area includes:

- A link: [Create a New Member Report](#)
- Two action buttons: - Run Selected Report and - Edit Selected Report
- A section header: **My Saved Reports**
- Text: There are no private reports available.
- A section header: **Public Reports**
- Text: There are no public reports available.
- A section header: **Administrative Options**
- A link: [Change quick search fields and default selected fields for THIS Member Report only](#)
- A section header: **Email Blasts**
- Text: No email blasts have been sent.

Figure 6. Membership Report Center Homepage

QuickSearch OptionsAdvanced Search Options

Existing Search Criteria

- [Active? equals True](#) X

Add a New Search Criterion

AND OR AND (OR (

--- Select a Field ---▼

Add this CriterionAdd & Continue

Calculate membership status as of: right now ▼

Figure 7. Advanced Search Page

The Advance Search Options utilizes computational logic (here's a chance to put your analytical and logic skills to use.) It may take a minute to get used to, but make sure your logic is correct so that you get the desire output that you seek.

What fields would you like to see in your report?

All Fields		Selected Fields	
#1 College/University	<input type="button" value=">>"/> <input type="button" value="<<"/>	Membership Record ID	<input type="button" value="Move Up"/> <input type="button" value="Move Dn"/>
#1 Employer Choice		Member Name	
#2 College/University		E-Mail	
#2 Employer Choice		Member Type	
#3 College/University		Chapter	
#3 Employer Choice		Active?	
Address - City			
Address - Country			
Address - Date Marked Incorrect			
Address - Last Updated			
<input type="button" value="Select All"/>		<input type="button" value="Deselect All"/>	

How would you like to sort your data?

Sort By: Descending Order

.. and then by: Descending Order

... and lastly, by: Descending Order

Please choose an output format for your report.

My Web Browser
 Microsoft Excel
 XML
 Statistical Analysis
 Mass Email

The results will show up in a list right in your web browser. From there, you may perform other operations on the results.

Figure 8. Report Output Page

Every criterion that you can search the membership database by can also be outputted to provide you with the values for that particular criterion. You can also output your report in various formats and save the report you create for future use.

Manage Chapter Invoices & Payments

Each chapter has an account history page, just as each individual does. This page stores all payment information assigned to the chapter and is very helpful with chapter bookkeeping. All orders, open invoices, payments and purchases are stored here for easy access. This page is accessed by following the “Manage Chapter Invoices & Payments” link.

The screenshot displays a web interface for managing chapter invoices and payments. At the top, a light blue box shows the 'Cash Account Balance' as '\$0.00'. Below this, a row of five buttons provides navigation: 'Open Invoices (0)', 'Invoices (0)', 'Payments (21)', 'Orders (0)', and 'Purchases (0)'. A large white box contains the message 'There are no open invoices on this account.' At the bottom, a blue header asks 'What would you like to do?' followed by two blue links: 'Go to WASHINGTON DC ALUMNI CHAPTER Main Page' and 'Go Back'.

Figure 9. Chapter Account History Homepage

Each chapter has a Cash Account on which money can be stored and accessed for chapter payments. To place money on your chapter’s cash account, please send a check to the Accounting & Finance team at NSBE WHQ and ask for the funds to be placed there.

Manage Chapter Confirmation Emails

NOL allows you to set up stationary emails to be sent to your members as a greeting when they become members of your chapter. This feature is effective in building the family atmosphere and really making members feel welcome. NOL even allows you to set up separate emails for new & returning members.

The screenshot displays a web interface for configuring confirmation emails. It is divided into two main sections: "Email to be Sent to New Members:" and "Email to be Sent to Renewing/Returning Members:". The "New Members" section includes a "Subject:" text input field, an "Attachments:" section with "No attachments." and an "Add Attachment" button, and a rich text editor. The rich text editor features a toolbar with icons for undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and insert link. Below the toolbar, the font is set to "Times New Roman", the size is adjustable, and a "Merge Fields" dropdown menu is visible. The editor's content area is currently blank. At the bottom of the editor, there are tabs for "Normal", "HTML", and "Preview", along with zoom in and zoom out icons.

Figure 10. Confirmation Email Setup Page

The Merge Fields allow you to take a generic email and personalize it! The fields provide information that is personal to each individual (email, first & last name, major, etc.) and allows you to replace generic words/statements in your email with the member's particular information so that it seems as if you are talking directly to them.

Manage Chapter Information

Through the “Manage Chapter Information” link, you can update the contact information on your chapter page and upload the latest version of your chapter constitution.

Line 1 :	<input type="text" value="NSBE-AEDC"/>	*
Line2:	<input type="text" value="P.O. Box 2955"/>	
City:	<input type="text" value="WASHINGTON"/>	*
State:	<input type="text" value="District of Columbia"/>	*
Zip/Postal Code:	<input type="text" value="20013"/>	*
Country:	<input type="text" value="United States"/>	*
Phone Information		
Preferred	Type	Number
<input checked="" type="radio"/>	<input type="text" value="Cell"/>	<input type="text" value="410.925.6682"/>
<input type="radio"/>	<input type="text" value="Cell"/>	<input type="text"/>
<input type="radio"/>	<input type="text" value="Fax"/>	<input type="text"/>
Other Chapter Information:		
Please upload your chapter constitution.		Uploaded .doc file (68096 KB) Upload a Different File Any attempt to upload a file larger than 7MB will result in a system error!

Figure 11. Chapter Information Update Page

There is some information on this page (the grayed out areas) that chapter leaders can not update (i.e. chapter name, chapter type.) To have this information updated, simply send an email to membership@nsbe.org requesting a chapter information update.

Add/Update Chapter Positions

Via the “Add/Update Chapter Positions” link, you can update your chapter positions, add other positions, and assign individuals to these positions. You can also assign the chapter permission levels (The degree of chapter features they can access) of each officer. Please note that only currently active members of your chapter can be assigned to your leadership positions as only these names will appear in the scroll-down menu next to each position. The only exceptions are the Advisor/Dean/Principal positions as these individuals’ information (first name, last name, and email) will have to be inputted manually.

Active:	From 8/7/2006 to 7/31/2007
Linked To:	Chapter - BAYTOWN NSBE JR.
Followed By:	This committee has not yet been succeeded.
Preceded By:	This committee has no predecessor.
Email:	No email has been set up for this committee.
Administrative Committee:	Yes

Committee Positions	
President	Fontenot, Mr. Brian Lee
Vice President	Creeks, Mr. Rasharrd Timonthy
Treasurer	Richards, Joe
Secretary	Singleton, Ms. Kristine
Principal	Moore-Fontenot, Mrs. Susan
Advisor	Moore-Fontenot, Mrs. Susan

What would you like to do?
♦ Create New Position
♦ Appoint Positions All At Once
♦ Send an Email to this Committee
♦ Back to BAYTOWN NSBE JR. Chapter
♦ Back to Membership Main

Figure 12. Officer Update Page

You can appoint one position at a time (by click on the name of the position,) appoint all positions at once, or just simply send and email to your executive board.

Pay Invoices For Chapter Members

NOL provides chapter leaders the ability to pay invoices for their chapter members. Chapters that collect payments for national membership dues for their members should become very familiar with this tool, as it is very powerful in ensuring that membership invoices are paid in a timely fashion.

Chapter Cash Account Balance: **\$0.00**

Pay for an Additional Member	Retrieve Members w/ Open Invoices		
Use this option to select a Chapter member to make a payment for. Only members with balances are shown.	Use this option to find all members with open invoices that meet a specific criterion- for instance, if you want to make a payment for everyone who owes money on 2007 National Convention, use this option.		
<input type="text" value="No members available."/> <input type="button" value="v"/>	Invoice search keywords: <input type="text"/> <input type="button" value="go →"/>		
Date	Invoice Name	Amount	Amt Paid
# 95727 - Guillory, Stephen Dewaine (s_guill1123@yahoo.com)			
11/7/2006	Invoice #529393	\$3.00	\$0.00
		\$3.00	<input type="text" value="\$ 0.00"/>

Figure 13. Chapter Invoices Page

You can pull up a particular individual (by utilizing the left column) or perform a key word search to find all individuals that have an invoice with those key words (right column.) If you would like to see all open invoices for members in your chapter, click the “go” button under “Retrieve Members w/Open Invoices” with the keywords box empty.

You can see the invoice by clicking on the Invoice Name (please view the invoices to ensure that you are paying for what you are supposed to be paying for.)

To make a payment on an invoice, place the amount of money that you are going to pay in the “Amt Paid” box for each invoice, then click “Continue” to proceed to the payment page.


Make a Payment	
Enter Payment Type ▶ Enter Payment Info ▶ Confirm Information ▶ Payment Success	
Total Payment Amount: \$3.00	
How would you like to make your payment?	Credit Card Information
<input checked="" type="radio"/> Credit Card 	Name on Card: <input type="text"/> *
<input type="radio"/> Cash Account (\$110.00)	Card Number: <input type="text"/> *
	Expiration: <input type="text"/> / <input type="text"/> mm/yyyy *
	Billing Zip Code: <input type="text"/> *

Figure 14. NOL Payment Page

On the payment page, if there is money on your chapter's cash account, then you can choose to pay with either a credit card or by using your cash account. Please note that amount in your cash account must equal or exceed the total payment amount in order to make payment using the cash account.

Enable Chapter Document Storage

Each chapter has 4 MB of storage space to store documents relating to their chapter. Clicking on the “Enable Chapter Document Storage” link enables this feature and turns this link into “Manage Chapter Documents.” Follow this link to access your chapter documents folder.

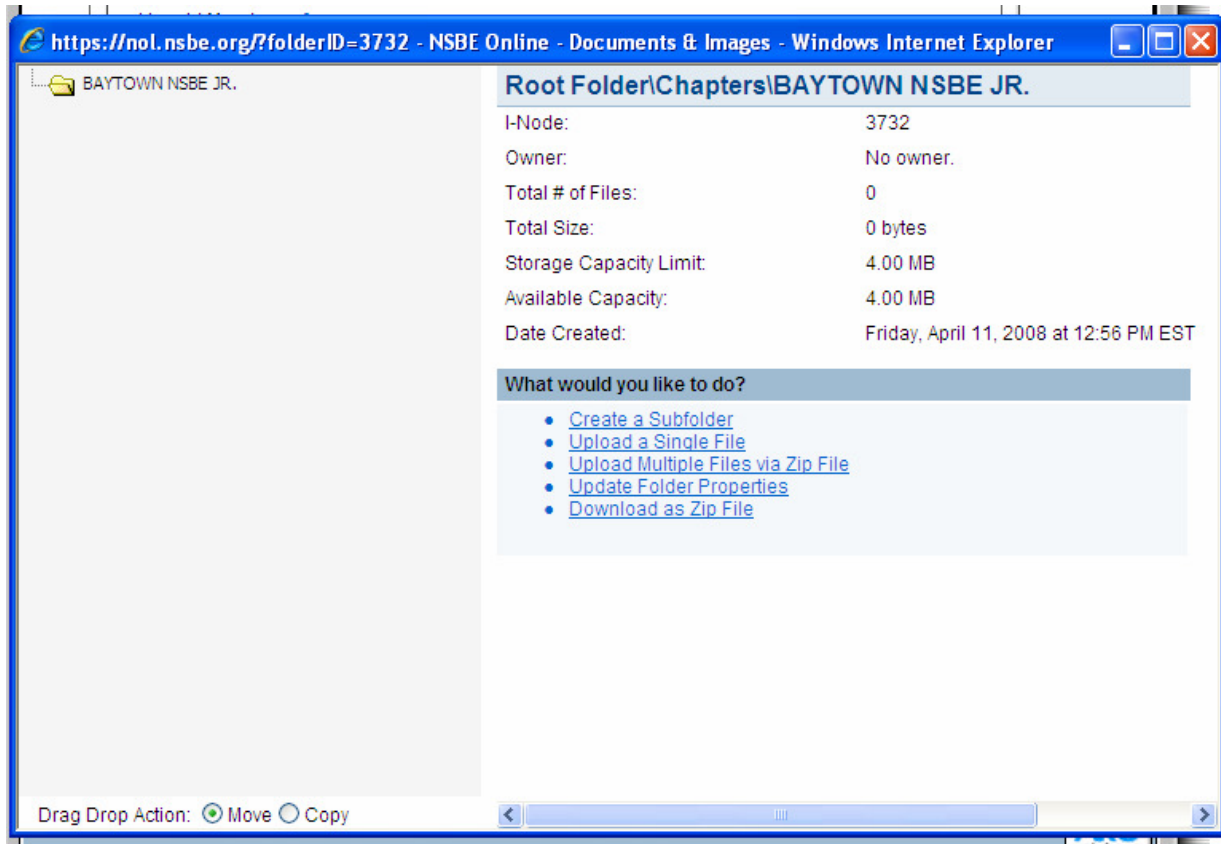


Figure 15. Chapter Documents Folder

Create a New Event

NOL allows chapters to set up events to aid with communication and registration management for the events. Easily disseminate information and track your # of attendees at your events by utilizing this module. The process of setting up an event is not very difficult. Simply name your event, choose the duration that the event will be open for registration acceptance, and choose the other features that you will like to utilize (features are explained on NOL.)

Basic Event Information	
Event Name:	<input type="text"/>
Event Category:	Conference <input type="button" value="v"/>
When does this event take place?	
From:	<input type="text"/> <input type="button" value="calendar"/> <input type="text"/> (hh:mm am/pm)
To:	<input type="text"/> <input type="button" value="calendar"/> <input type="text"/> EST <input type="button" value="v"/> (hh:mm am/pm)
Is this event happening during another event?	
<input type="radio"/> Yes, this event occurs during or within another event	
<input checked="" type="radio"/> No, this event does not occur within or during another event	
<input type="checkbox"/> This event should be featured on the main events page (Admins only)	
Customize the Look and Feel of this Event	
Would you like to upload a custom image to be displayed at the top of the screen?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Would you like to customize the NSBE Online header and footer for this event? Advanced Users ONLY - working HTML knowledge is required.	<input type="radio"/> Yes <input checked="" type="radio"/> No
Would you like to hide the navigation buttons at the top of the screen for this event? Doing this will keep people from easily navigating away from this event page	<input type="radio"/> Yes <input checked="" type="radio"/> No
Would you prevent this event from showing up in the quick search box? Doing this will keep people from finding the event unless explicitly given the event link	<input type="radio"/> Yes <input checked="" type="radio"/> No
What type of event is this?	
<input type="radio"/> General/National <input type="radio"/> Region <input type="radio"/> Zone <input checked="" type="radio"/> Chapter	
<input type="text" value="BAYTOWN NSBE JR."/> <input type="button" value="v"/>	
Event Location	

Figure 16. Event Setup Page

Create a New Survey

NOL allows you to create, disseminate, and collect surveys from your membership. It will even perform the statistical analysis for you! Developing a survey may be a bit tedious at times, but this feature can prove to be very useful in understanding your membership.

Basic Survey Information

Survey Name:

Survey Category: Survey Election

When should the survey be open?*

From: (hh:mm am/pm)

To: EST (hh:mm am/pm)

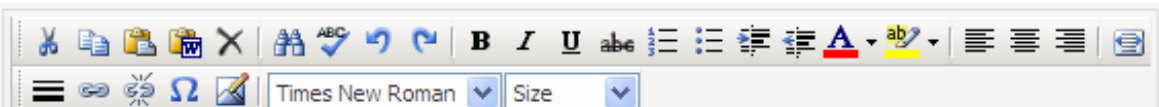
This survey should be featured on the main surveys page (Admins only)

What type of survey is this?

General/National Region Zone Chapter

BAYTOWN NSBE JR.

Survey Description



Times New Roman Size

Figure 17. Survey Setup Page

Go Back to Membership Main

This link simply takes you back to your membership main page.