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# Disabled American Veterans Membership System User Manual for Department Commanders and Adjutants

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# **Basic Web Application Usage**

#### **Full Screen Mode**

The membership application user interface has been designed to take advantage of as much screen space as possible and minimize scrolling. This requires the internal user to be in Full Screen Mode. To enter Full Screen Mode strike <F11> on the keyboard. To leave Full Screen Mode strike <F11> again.

## **Tabbing**

Navigation through the page can be accomplished through the use of the <TAB> key on the keyboard. In most cases tabbing is left to right, top to bottom and follows the same order as data entry would from printed forms.

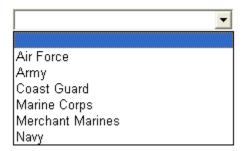
<TAB> Move the cursor forward one screen element <SHIFT><TAB> Move the cursor backward one screen element

#### **Pull Down Menus**

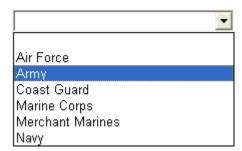
Pull down menus allow the user to select from a list of many options.



A pull down menu with no value selected.



A pull down menu with the list expanded.



A pull down list with the desired value selected.



A pull down list with the selection complete.

When selecting from long pull down menus, such as State or Country, it is possible to jump to the selected value using only the keyboard. For example, using the pull down menu above as an example we want to select Merchant Marines without using the mouse. With the cursor on the pull down menu hit the <M> key twice. The first strike of the <M> key brings up Marine Corps. The second strike of the <M> key brings up the next value in the list beginning with an 'M'. In our example this is Merchant Marines.

Also note that while on a pull down menu striking the <ENTER> key will not affect any buttons on the screen associated with the key. The user must tab out of the pull down menu before striking <ENTER>.

## **Radio Buttons**

Radio buttons are used when selection values are unique. In other words, the user may only select one value in the list.

Male ○ Female ○ Unknown

When the user tabs into a list of radio buttons they may move from button to button using the left and right arrow keys on the keyboard. To select a button press the <SPACE BAR> while the cursor is on the desired button.

WARNING: Once the user makes a selection in a list of radio buttons they will not be able to turn the selection off. They may change the selection to another button but will be required to have a selection.

#### **Check Boxes**

Check boxes are used when selection values can contain more than one value. In other words, the user may select as many of the check boxes as desired.

✓ Member☐ Net Prospect

When the user tabs into a list of check boxes they may move from box to box using the <TAB> key. To select a box press the <SPACE BAR> while the cursor is on the desired box.

## **Calendars and Dates**

Capturing dates correctly is very important to the system. When entering the date it must be in one of the following formats:

mm/dd/yyyy eg: 03/23/2003 mmddyyyy eg: 03232003 It may be useful to use the following keyboard shortcuts:

Today's Date <.>
Next Day <+>
Previous Day <->

It is also possible to bring up a calendar in order to select the date. To bring up a calendar use the mouse to click on the calendar icon following the field. You may also tab out of the date field and onto the calendar icon and hit <ENTER> to open the calendar. The calendar icon is shown below.



The following is an example of the calendar that appears:



To advance forward one month click on the arrow to the right of the Month and Year as shown below:



To go back one month click on the arrow to the left of the Month and Year as shown below:



To select the desired date simply click on the day.

# **Tool Tips**

Almost every field in the application has an associated Tool Tip. Tool tips appear when the mouse is left to hover briefly over the field. The tool tip then appears revealing important information concerning the field. Move the mouse away from the field and the tool tip disappears.

# **Member Login**

#### Overview

To access the Membership System, you need to go to the website address: www.davmembers.org. The following login screen will display:



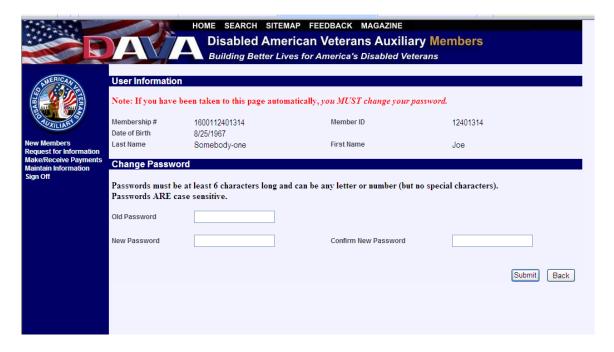
## Usage

Type in your membership number and password. The default password is your birth date (MM/DD/YYYY), and you will be taken to a screen to change your password the first time you login. If you are not a member, clicking on the **Join the Disabled American Veterans** link will take you to a membership application.

# **Change Password**

#### Overview

You will be prompted with this screen automatically the first time you login so that you can change your default password to a new unique password. You may also access this screen from the **Maintain Information** menu, if you decide to change your password again.



## Usage

To change your password, type your passwords in the required fields and press **Submit**. **Note:** Passwords must be at least 6 characters long and can be letters or numbers, but no special characters. **Passwords are case sensitive.** 

# Welcome

# Overview

Once you have successfully logged in, the **Welcome** screen will display. On the left, in the blue, you will be able to access menu items.



# **DAV Online Application**

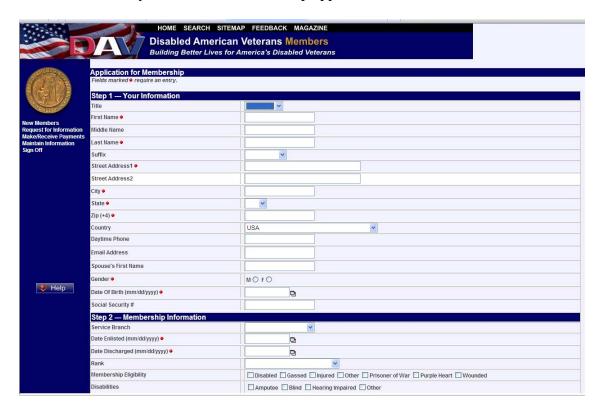
# Navigation

From the New Members menu, select DAV Online Application.



## Overview

The screen allows you to enter a membership application.



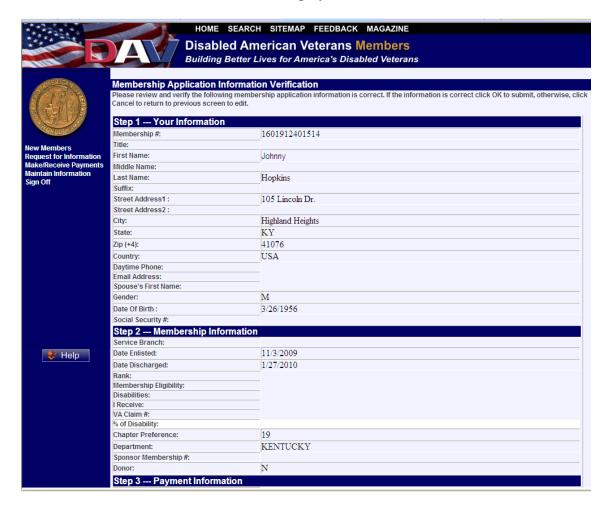
## Usage

Type all member information in the appropriate fields. The pull-down menu for Rank is determined by the Service Branch selected.

If the applicant does not know the Chapter Number, they may perform a Chapter lookup by clicking on the Chapter Preference field label. Once they have determined the Chapter number using the lookup function, they can return to the application by clicking the back button on their browser and enter it in the appropriate field.

When adding foreign addresses, set the State to 'XX' and the Zip Code to '00000'.

Once all information has been entered, click on **Submit** to submit the application information. A confirmation screen will display:



Click on **OK** if the information is correct, or click on **Cancel** to return to the previous screen to make edits.

# **New Magazine Subscription**

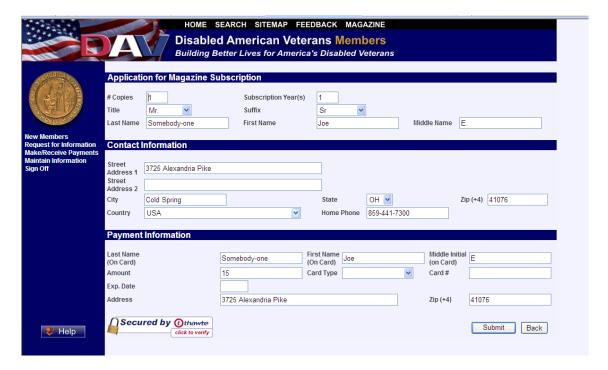
# Navigation

From the New Members menu, select New Magazine Subscription.



#### Overview

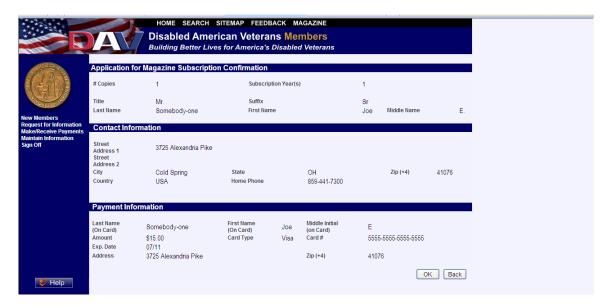
The purpose of this screen is to accept paid magazine subscriptions.



## Usage

Specify the number of copies, subscription duration in years, address and credit card information. When adding foreign addresses, set the State to 'XX' and the Zip Code to '00000'.

When finished entering all information, click on **Submit**. A confirmation screen will display:



Click on **OK** if the information is correct, or click on **Back** to return to the previous screen to make edits.

# **Chapter/Unit Listings by State**

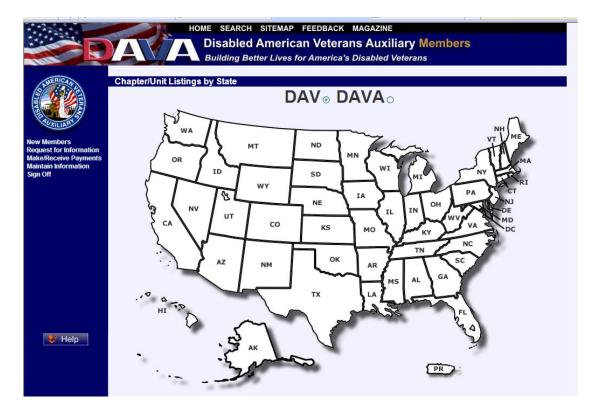
## Navigation

From the New Members menu, select Chapter/Unit Listings by State.



## Overview

The purpose of this screen is to display the chapters or units that have members residing in the selected state. The results of the screen can be used to place a member into a chapter/unit or to send meeting information via email.



## Usage

Select whether to look for DAV Chapters or DAVA Units. Next, click the appropriate state. The result set is then displayed on the same page in the following format:



Contact information is provided, as well as meeting time and address. To view the chapter's website, click the **Website** link. To view a map of the office's location, click the **Map** link.

# Find a local Chapter/Unit by Zip Code

## **Navigation**

From the New Members menu, select Find a local Chapter/Unit by Zip Code.



## Overview

The purpose of this screen is to display the chapters or units that have members residing in the zip code entered. The results of the screen can be used to place a member into a chapter or to send meeting information via email.

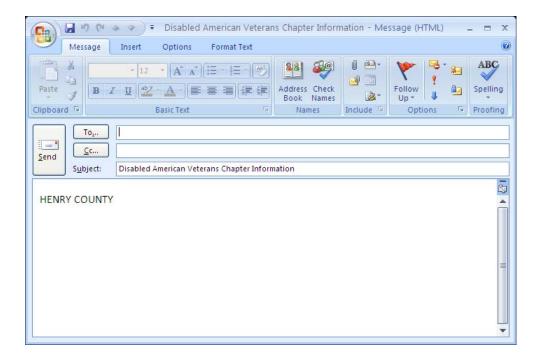


## Usage

Select whether to look for DAV Chapters or DAVA Units. Enter the zip code and click on **Search** (the zip code is required). The result set is then displayed on the same page in the following format:



Clicking on the email icon (envelope at the end of each row) brings up the name of the office in an email:



Simply address the email to the desired recipient and send the email.

# Reports

# **Navigation**

From the **Request for Information** Menu, select **Reports**.



#### Overview

The purpose of this screen is to generate a variety of reports based on certain criteria (parameters) entered.

# Usage

Click on the **Report** pull down menu to display a list of report choices.



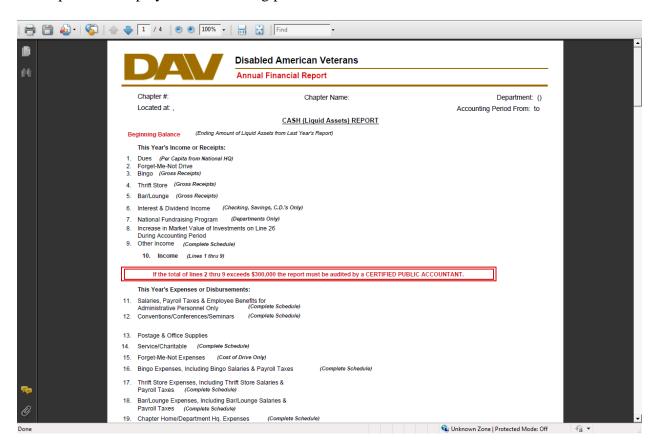
Select the type of report you would like to run from the drop-down menu, fill in the required parameters, and click on **Generate**.

The following summary describes the reports in more detail:

**Annual Financial Report** – Allows you to view online, or generate a printable version of the department's financial report or the financial report of a specified chapter within that department.

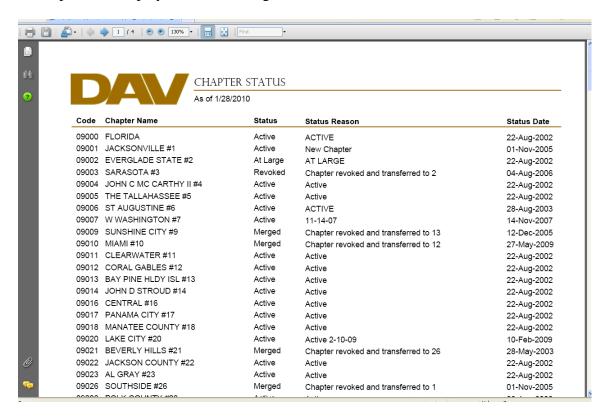


Enter the desired date and click on **Generate**.

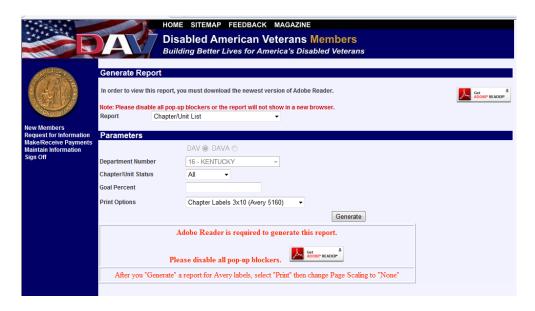


**Chapter Status** – Denotes if a chapter or unit within that department has filed a Chapter Unit Officer or Financial report.

Enter desired dates and click on Generate.



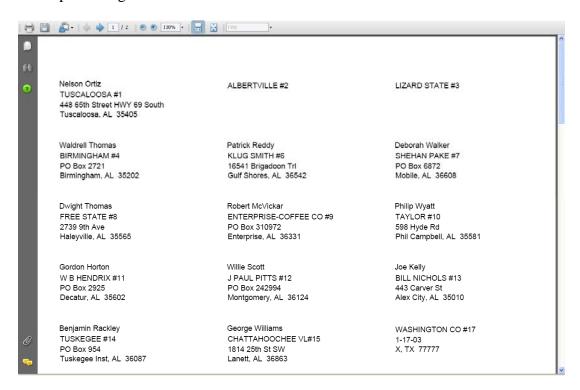
**Chapter/Unit List -** Displays a list of all chapters or units by department. The report allows the user to specify chapters with all statuses, or only those with a specified status, such as Active, Suspended, On Hold, etc.



Select Chapter Unit Status using the dropdown arrow.

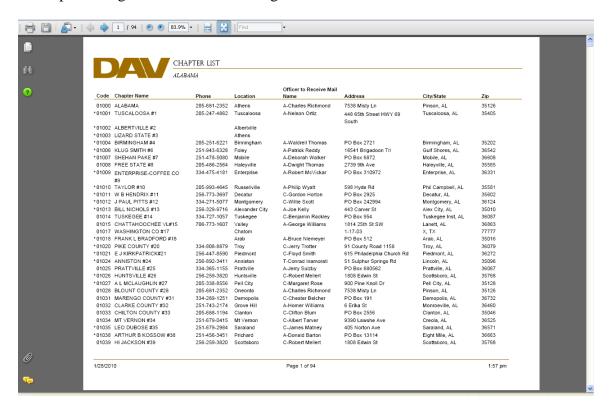
To print labels, select the desired label format from the dropdown list and click on **Generate**.

The report will generate in label format:



For report format, select Chapter List Report from the Print Options dropdown list.

The report will generate in the following format:



**Membership List** - Displays a list of all members, along with the member's current address, phone number, balance due, and membership status in a specified department/chapter.



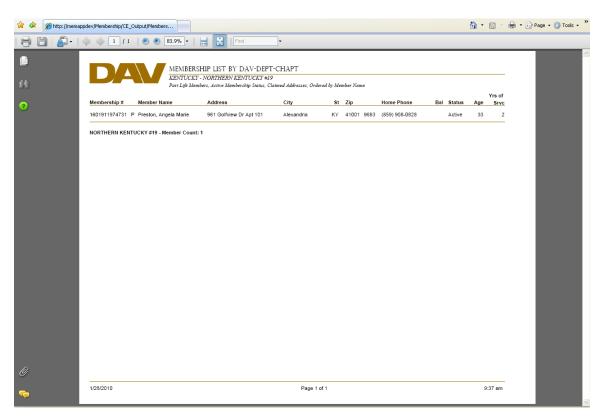
Enter the **Chapter Unit Number**, and select the **Membership Type** and **Membership Status** desired from the dropdown menus, or if you would like all types, leave the field as '**All**'. Select the **Address Status** from the dropdown menu, if desired, and select the order in which you would like the information to display, (i.e. by membership number or alphabetical order etc.) and click on **Generate**. To print labels in a 3 x 10 format, leave the check mark in the check box.

The report will generate in the following label format:



For report format, uncheck **Print Labels** by clicking in the check box.

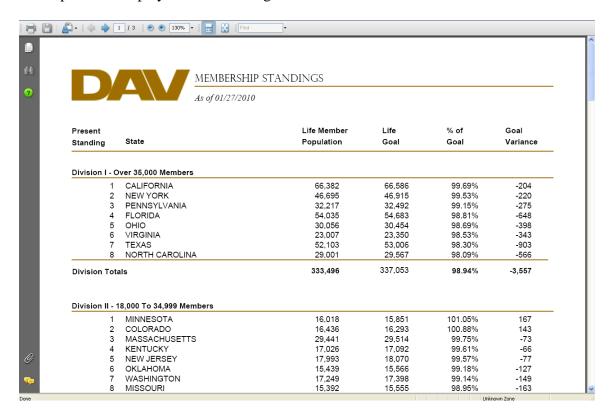
The report will generate in the following format:



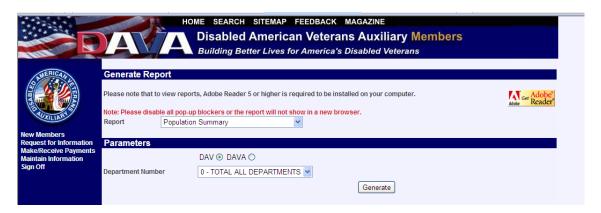
**Membership Standings** - Displays a list of all departments, and which division they belong to, based upon number of memberships. Division 1 - Over 35,000 members. Division 2 - 18,000 - 34,999 members. Division 3 - 10,000 - 17,999 members. Division 4 - 5,000 - 9,999 members. Division 5 - Under 5,000 members.



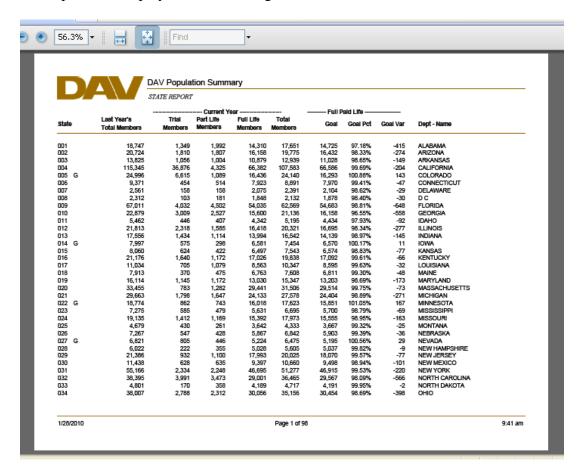
No parameters, simply click on **Generate**.



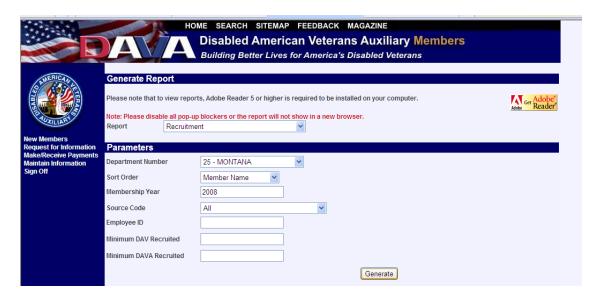
**Population Summary** - Displays a list of the current membership counts for a specified department, and all of its chapters.



No parameters, simply click on **Generate**.

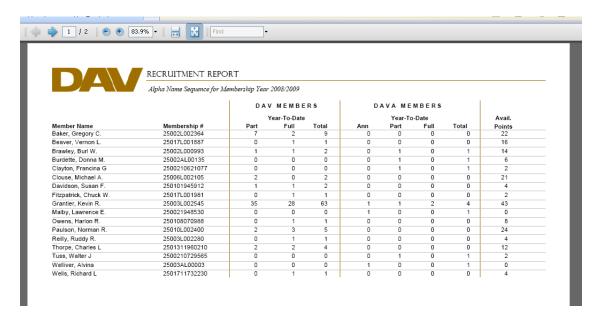


**Recruitment** - Displays a list of recruiters in a given department and chapter, for a specified membership year.



This report has options for specifying a **Source Code**, such as NSO Promo, Presep Program, etc. It has further options to retrieve information for a supplied **Employee Id**, **Minimum DAV** members recruited, and/or **Minimum DAVA** members recruited. Finally, it allows for multiple sorting options -- Member Name, Membership Number, and Total Recruits.

Select the desired parameters using the dropdown arrows and click on **Generate**.



# **Payment Submission**

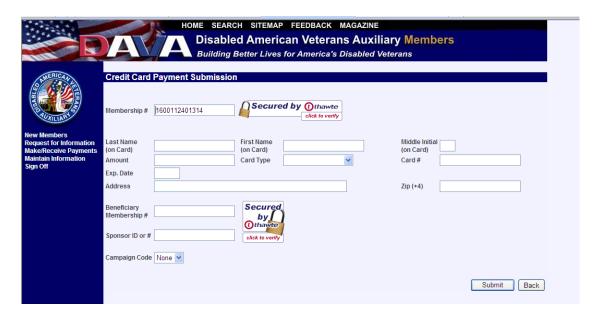
## **Navigation**

From the Make/Receive Payments menu, select Payment Submission.



#### Overview

The purpose of this screen is to accept payments against one or more memberships held by a single member.

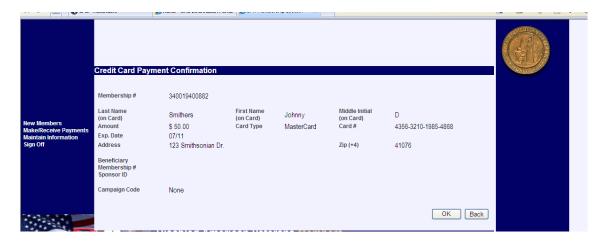


## Usage

Enter the Membership number and credit card information. The **Beneficiary Membership** number is optional and allows one person to pay for another person's

membership. In the future, the **Campaign Code** will allow you to enter the code located on mailings and dues notices. Once the information is complete, click **Submit**.

A confirmation screen will display:



Click on **OK** if information is correct, or return to the previous screen to make edits.

# **Maintain Member**

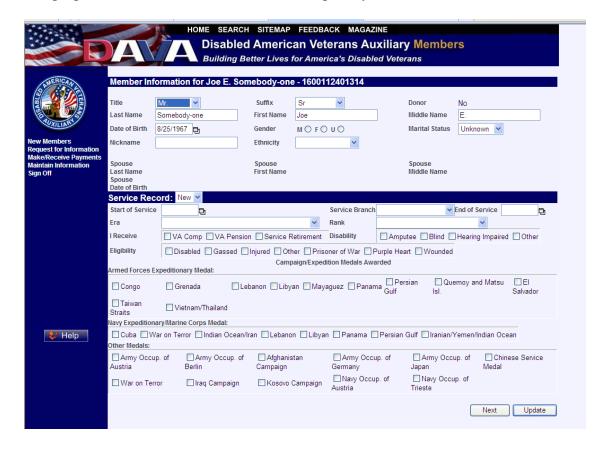
# Navigation

From the Maintain Information menu, select Maintain Member.



#### Overview

The purpose of this screen is to maintain and update your own member information.

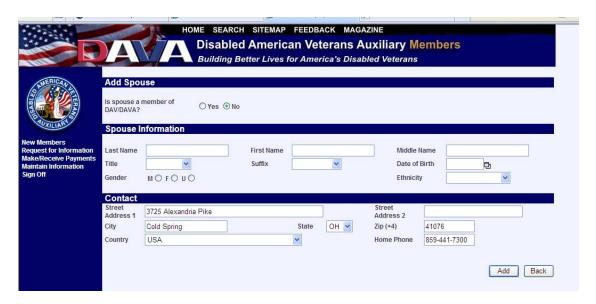


## **Usage**

Enter any changes to your information by typing them in, or click on the arrow adjacent to the field to access a dropdown list of choices. To switch between a member's service records, use the **Service Record** dropdown. To add a new service record, select **New** from the **Service Record** dropdown list.

When changing the marital staus to married, the **Add Spouse** screen will display, allowing the operator to enter the spouse information.

This is the **Add Spouse** screen:

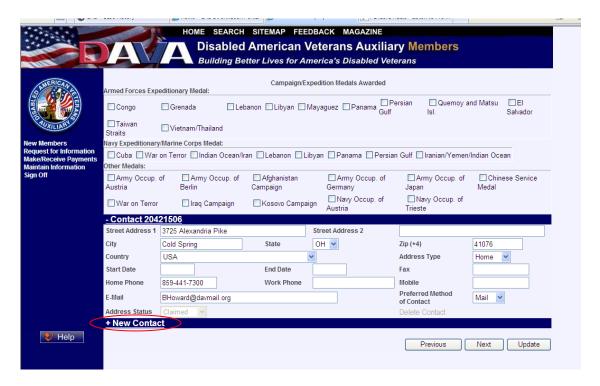


Once all spouse information is complete, click on the **Add** button to add the information to the profile. The following screen will display, reflecting the updated spouse information:



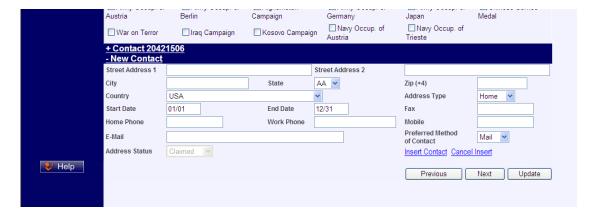
From this **Member Information** screen, clicking on the **Next** button takes the operator to the second page of **Maintain Member**, which will display contact information.

The contact screen displays in the following format:



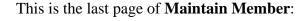
You may correct any contact information and click **Update**.

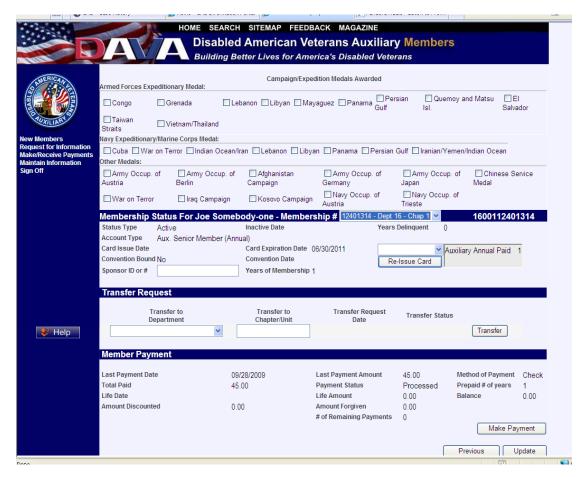
To add a new contact, click on the **New Contact** (see circled item above) and the **New Contact** screen will display:



When you have finished entering all contact information, click on **Insert Contact** and then click on **Update**. Click on **Next** to access the last page of **Maintain Member**.

This second page is for editing contact information. Click on **Next** to access the last page of **Maintain Member**.





You can request a transfer from one chapter to another chapter from this screen by selecting the desired department from the dropdown menu and clicking on **Transfer**.

You can click on Make Payment to access the Payment Submission screen.

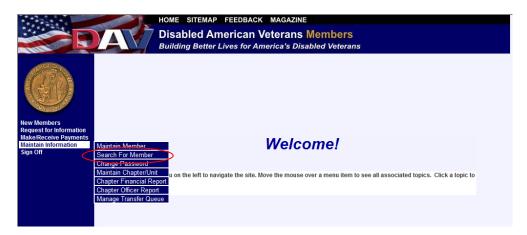
Clicking on the **Previous** button takes the operator to the previous page of **Maintain Member**.

When finished entering all information, press **Update** to submit and update the member information.

# **Search for Member**

# **Navigation**

From the Maintain Information menu, select Search For Member.



#### Overview

The purpose of this screen is to search for a member.



## Usage

Input any known information and click on **Search**. Note that you do not need to input all information, but the more definitive the information, the more specific your results will be. You may also perform a "wild card search" by using an asterisk (\*) in the name fields if you are unsure of the spelling of the name. Ex: you can type in Anders\* for the last name if you do not know if the spelling is Andersen or Anderson. The results will be any names that start with Anders. Note also that this search screen is not case sensitive.



The results of this search will display in the following format:



The **Member ID** column displays the member ID in a hyperlink format which you can click on to access that particular member's record. Once you have located the record you desire, you can make changes to the member's information.

# **Maintain Chapter/Department Information**

# **Navigation**

From the **Maintain Information** menu, select **Maintain Chapter/Unit** (or **Department**).



#### Overview

The purpose of this screen is to maintain chapter (or department) information.



# Usage

You may make edits to the information by typing in the appropriate fields and pressing **Update**. When adding foreign addresses, set the State to 'XX' and the Zip Code to '00000'.

# **Department/Chapter Financial Report**

## Navigation

From the **Maintain Information** menu, select **Chapter** (or Department) **Financial Report**.



#### Overview

The purpose of this screen is to capture the information submitted for Department or Chapter Financial Reports into the Membership System.



#### Usage

To view previously submitted reports, select the desired report period from the View Previous Report dropdown menu:



To begin a new Annual Financial Report, be sure Current Report appears in the View Previous Reports box.

Type in the accounting year and click on the **Check Accounting Dates** button. Provided that the accounting period is correct, the Annual Financial Report-In Process page will appear and allow for information to be entered. You may click on the **Financial Report Instruction** button to download a complete set of instructions for completing the report.

The Beginning Balance is brought forward from the last approved report on the Membership System.

All lines that require a schedule are identified by a dollar amount link that, when clicked on, will open the corresponding schedule. When finished entering items and amounts on the schedule, click on the **Save** button located at the bottom right of the schedule page. The total for the schedule will be brought forward into the financial report on that line.

Record any fixed assets, such as real estate, furniture, vehicles, and inventory by clicking on the **Other Assets Schedule** button at the bottom of the page.

If Membership numbers are not known for the Audit Committee, click on the **Membership** # link to execute a Search for Member.

Clicking on the **Save** button at the bottom of the page saves the report in its current state without approval. This is useful if the operator needs to leave a report incomplete and will be coming back to work on it later.

Clicking on the **Submit** button enters a completed report into the Membership System for review by National Headquarters. It is important that your report is accurate and complete before the **Submit** button is clicked. Once a report has been submitted it cannot be changed.

Once a report has been approved, it may be viewed by selecting it from the **View Previous Report** dropdown menu. The report will be displayed as read-only on the screen.

To print the complete financial report, please refer to the **Reports** section of this manual

# **Department/Chapter Officer Report**

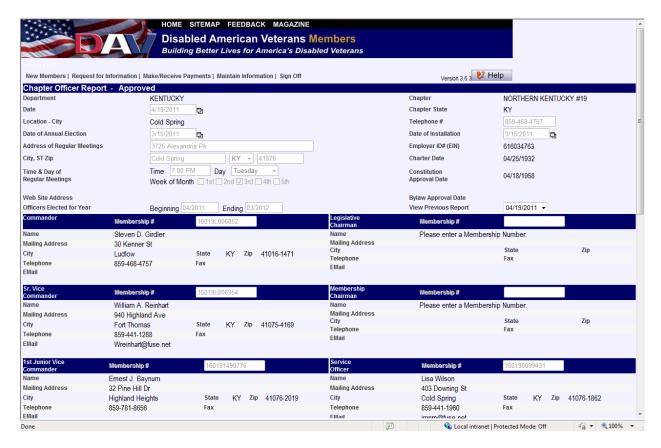
## Navigation

From the **Maintain Information** menu, select **Chapter** (or Department) **Officer Report**.



#### Overview

The purpose of this screen is to capture the information submitted on the Department or Chapter Officer Report.



## Usage

In most cases the operator will enter a report in its entirety; however, it is possible to save a partially completed report. Use the **Save** button at the bottom of the screen for this purpose. When the operator returns to the report, all of the previously entered information is present.

When entering officers, it is only necessary to enter their Membership #. If the number is not known, the operator may look up the member by clicking on the **Membership** # field label for the desired officer position. This will take the operator to the **Search for Member** screen. Once the appropriate member is found, clicking on their ID will return that users information to the Officer Report.

The **Unlock** button is used to allow modification of an approved report. The **Force Approve** button is used to accept a report that is in violation of the business rules.

This report is available in a printable version as well for chapter or department records.