



American Legion Auxiliary

Management Information System (ALA MIS)

Unit Full Training Manual

Updated: May 4, 2018

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OVERVIEW

The American Legion Auxiliary Management Information System (ALA MIS) is used by units, districts/divisions, and departments to manage members, units, departments and leadership information. Units are only allowed to designate up to two users for login access. The cost is \$10 per login. This is collected through the department and transmitted to the NHQ. The department headquarters authorizes who has access. Units must contact their department with the name of the member who should have access to ALA MIS along with the member's email address, member ID number, and phone number for the person at the unit who will be using the account.

Units can stay informed of important reminders from National Headquarters by viewing our announcements on ALA MIS. Units are also able to make updates, perform searches, and view unit reports.

Make Updates

- Add new members
- Update member information (name, address, phone number, email address, birthday, marital status)
- Update *Auxiliary* magazine preference (mail, online, or no magazine)
- Update solicitation preference
- Request to have no mail/phone calls
- Add unit leadership positions

Perform Searches

- See if dues have been applied to a member in the unit
- View a member's join date
- View a member's membership activity
- Search for members in the unit
- Filter and view only expired, junior, or adult members
- View a member's member ID number
- View a member's paid through date
- See if a member is in a special category such as Paid Up For Life (PUFL) member or Honorary Life member (HLM)

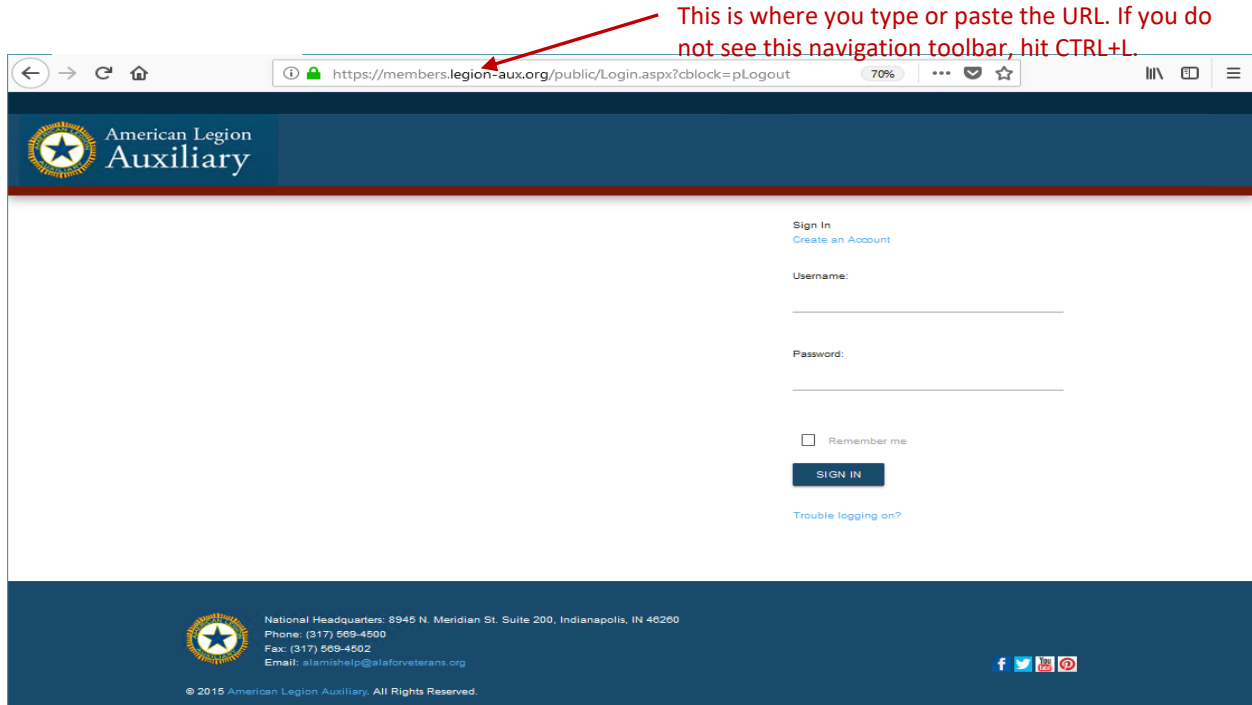
View Reports

- View Unit Reports to export into Excel, Word, or as a PDF document
- Use Excel exports to do mail merges if the unit needs to send letters, emails, or make labels for members
- Use Membership Roster to view all members in their unit
- Use Leadership Roster to view all leaders in their unit
- View the members who have paid dues report
- View the members who have not paid dues report
- View the members who have paid their dues online report
- View the Deceased Member report for all members under your unit
- View the Expired and Former Member reports for all members under your unit

ACCESSING ALA MIS

Step 1: URL (website address)

To access the ALA MIS, open Mozilla Firefox or Internet Explorer, enter as the URL: <https://members.legion-aux.org>. The ALA MIS Login Screen should appear. We do not recommend using Chrome, as it can hide some information.

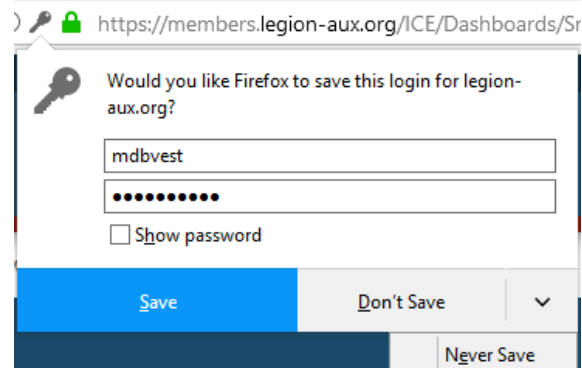


Bookmark this page from Firefox by hitting **Ctrl+D**. Next time you need to access ALA MIS, open up Firefox and go to the **Bookmarks** menu. Select the **American Legion Auxiliary - Login** page instead of typing in the URL. Or add this page to your **Favorites** from Internet Explorer by going to your Favorites menu and selecting **Add to Favorites**.

Step 2: Username/Password

Enter your **Username** – Usernames are NOT case sensitive

Enter your **Password** – Passwords are case sensitive. Do NOT share your password with other members of your unit. If a new user is appointed, then contact your Department Headquarters for a new ALA MIS account. Firefox may ask you if you want it to remember your password. Select **Never Remember Password for This Site**.



Additional Information



[Create an Account](#)

Make sure you look for this icon on the right corner of your screen when you are using ALA MIS. Click on this icon for important information. Click on it again to close it.

Access to this system is limited to authorized users. User accounts are currently created and administered by the American Legion Auxiliary National Headquarters. Please contact your Department Headquarters to obtain a User Account.

If you have an ALA MIS account, do not share your password. If a new account needs to be created for a new user, please contact your Department Headquarters.

Remember me

If you check this box, each time you return to the ALA MIS site from your computer, the site will remember your username but not your password. You will still have to enter your password each time you log in. For security reasons, if you remain idle in the ALA MIS for more than 10 minutes you will be logged out.

[Trouble logging on?](#)

Access to this system is limited to authorized users. If you have login issues please contact the ALA MIS help desk at (317) 569-4536 or by email ALAMISHelp@alaforveterans.org.

TASK CENTER

The Task Center is the Homepage for the ALA MIS. Click the Task Center button from anywhere on the website, and you will return to the Task Center.

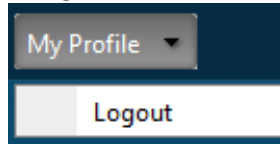
SITE MAP

The screenshot shows the ALA MIS Task Center homepage. At the top right, there is a 'Click to logout' arrow pointing to a 'My Profile' dropdown menu (callout 2). Below the header, there is a navigation bar with 'Task Center', 'Members', 'Unit', 'Department', and 'Help' (callout 3). A horizontal menu contains buttons for 'Task' (callout 1), '7', '8', '9', and '10'. Below this, a link for 'UNIT 0022' is highlighted with callout 4, and a button next to it is labeled 'Click to view/collapse contact information' (callout 5). The main content area (callout 6) features a 'Welcome to ALA MIS' message with 'Important Reminders' and sections for 'DEPARTMENT' and 'UNIT' containing various notices and reports. At the bottom, there is a note about the 'National Headquarters Holiday Schedule'.

MY PROFILE

2

For security reasons, please **LOGOUT** and close your browser each time you exit the system. To logout, select the down arrow next to My Profile and then select Logout. You will not be able to view or edit your profile.



JUMP TO

3

Jump To is used by Department and District/Division Users Only

UNIT NUMBER

4

The unit will always be displayed in the middle of your screen

MD UNIT 0166

CONTACT INFORMATION

5

Click to view/collapse contact information

The contact information for your unit can be displayed by clicking in the unit number box. It can be hidden by clicking on it again. The unit's number, legal name, mailing (permanent) address, billing address, telephone number, and website can be found in this area. If this information is not correct, please contact your department with changes needed. **This is NOT the unit Remit To information.**

AK UNIT 0001	
Mailing Address: American Legion Aux Unit 0001 2208 Romig Pl. Anchorage, AK 99503-1683	Billing Address: American Legion Aux Unit 0001 2208 Romig Pl. Anchorage, AK 99503-1683
Phone:	Website:

ANNOUNCEMENTS

6

The information in the Announcements section is controlled by ALA National Headquarters. See this section for important information, dates and times for planned system maintenance, deadline reminders, etc.

MEMBERS TAB

7

ADD A NEW MEMBER

Step 1: Navigation

[Members] → Add New Member → Add New Member

Step 2: Action Steps

1. **Overview**

Please search for new members before adding them to the database. This cuts down on the number of duplicate records we have in the database. See the Unit Handbook for guidelines for new members as well as eligibility requirements. After you add a new member, she will be entered into the system as a Pending Member/ Jr Member. After payment is processed, the member will become an Active Member/Jr Member.

2. **Selection**

Fill in the information for each New Member (Required fields have an *) then select **“Add Person”** at the bottom of the screen. Screen shot available on next page.

Overview Selection Additional Info Validation Receipt

PREVIOUS (Overview) Step: Selection CONTINUE (Additional Info)

Step 2 (Selection) – List New Members

Fill out the below information and click Add Person. Required fields have an asterisk (*) next to them. If done correctly, the members name and email will appear in the list at the bottom of your screen. Repeat for each new member you wish to add to this Unit. When all new members have been entered, click Continue. In order for add a member completely you must continue till you get a receipt.

Name

First: First Name*

Middle: Middle Name

Last: Last Name*

Permanent Address

Line 1: Address Line 1*

Line 2: Address Line 2

Line 3: Address Line 3

City: City*

State: State*

Zip/Postal Code: Zip/Postal Code*

Country: United States


Contact Information

Home: Home Phone

Work: Work Phone

Cell: Cell Phone

Email: Preferred Email Address

BirthDay: Date of Birth 

Eligibility Information

Eligible Through: Name of Veteran Eligibl

Veteran Currently: Living Deceased

Post Number: Veteran's Affiliated Pos

Post City: Veteran's Post City* (Re



Post State: Veteran's Post State* (Required if Veteran is Living)

Legion Member: Veteran's Legion Memb

Served In: Veteran Served In War Era*

Relationship: Applicant's Relation to Veteran*

ADD PERSON

First Name	Middle Name	Last Name	Email	
My	BFF	Joyce		 

PREVIOUS (Overview) Step: Selection CONTINUE (Additional Info)

Date of birth is required if you are adding a junior member or she will be added as a senior member with senior rates if no date of birth is entered.

You must hit the ADD PERSON button or your member will not be added.

If you make a mistake after you have clicked Add Person, you can click here to Edit that member's info or delete that member altogether.




To verify that you have successfully added the member, their name and email will appear at the bottom of the screen. (See example on previous page, Test Person) Repeat for each member you wish to add and click Continue.

Note: If you click Continue without clicking "Add Person" the member will not be added and you will have to reenter the member's information.

3. Additional Info

Here you can change the Join Date if applicable for each member. Enter a join date before September 1 of the current membership year and the member added will be billed for current year dues. Enter a join date on or after September 1 of the current membership year and the member will be billed for next year dues.

Example: On 10/16/2018, Jane Smith is added with a Join date of 8/15/2017. Jane is billed for 2017 Dues but if Jane Smith was added on the same day with a Join date of 9/26/2018, Jane will be billed for 2018 Dues.

Overview	Selection	Additional Info	Validation	Receipt										
<p>PREVIOUS (Selection)</p>		<p>Step: Additional Info</p>		<p>CONTINUE (Validation)</p>										
<p>Step 3 (Additional Information)</p> <p>Please enter the Join Date for the new member - JOIN DATE IS THE DATE YOU ENTER THE MEMBER INTO THE SYSTEM Important! This date will be used to determine the dues year the new member will be billed for.</p> <p>Join Date between 9/1/2015 - 8/31/2016: Member will be billed for 2016 Dues Join Date between 9/1/2016 - 8/31/2017: Member will be billed for 2017 Dues</p> <p>NOTE: Members entered with a future join date will <u>not</u> appear on the Pay Dues Roster until that date.</p> <table border="1"> <thead> <tr> <th>First Name</th> <th>Middle Name</th> <th>Last Name</th> <th>Email</th> <th>Additional Information</th> </tr> </thead> <tbody> <tr> <td>BFF</td> <td></td> <td>Joyce</td> <td></td> <td>* Join Date: 2/23/2018  Apply To All</td> </tr> </tbody> </table>					First Name	Middle Name	Last Name	Email	Additional Information	BFF		Joyce		* Join Date: 2/23/2018  Apply To All
First Name	Middle Name	Last Name	Email	Additional Information										
BFF		Joyce		* Join Date: 2/23/2018  Apply To All										
<p>PREVIOUS (Selection)</p>		<p>Step: Additional Info</p>		<p>CONTINUE (Validation)</p>										

4. Validation

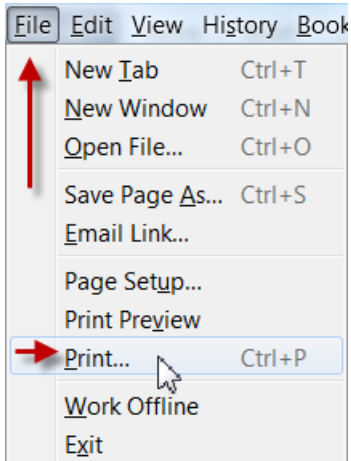
Please review the information to ensure accuracy and enter your electronic signature exactly as it appears on the screen. Then click "Continue" to submit your transaction.

5. Receipt

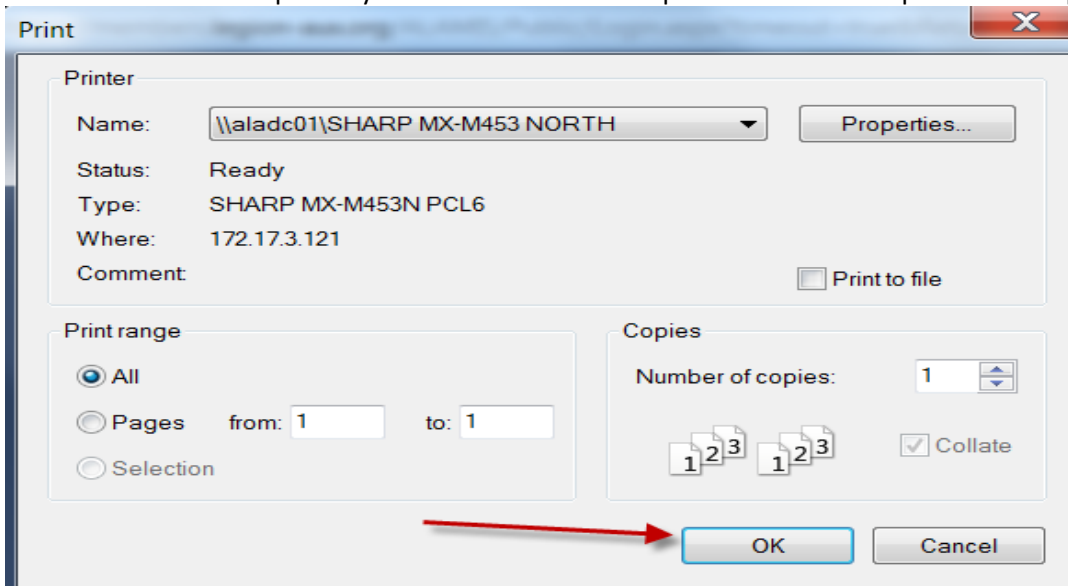
You have successfully added a Pending Member. Print and keep a copy of the displayed receipt for your records.

To print a receipt either:

- Hit **Ctrl+P**
- Or go to the upper left hand corner of the page and click on **File>Print**



Another window will open so you can select different options or click ok to proceed with print job.



Important: The system will now complete an automated process. Please remember that units cannot pay dues, but your department can pay the member's dues after the automated process is completed.

EDIT MEMBER INFORMATION

Units can view and edit demographic, personal, and membership information for the members in their Unit. They can also see a report of all of an individual member's activities and/or history of all changes made to the member's record.

Edit Member Profile

Step 1: Navigation

[Members] → Edit Member Info → Edit Member Profile

Step 2: Find Member

This screen displays basic information for all of the Current Active Members of this Unit in alphabetical order by last name. To see more detailed information and/or to make changes, first find the member using one of the following methods:

- Scroll down to the member
- Use the Filter to display only Senior or Junior Members – (Using the filter is particularly helpful when dealing with larger Units). Deceased, pending, and former members will not be displayed.
- Type in any part of the member's First or Last Name and select the member from list of results

The screenshot shows the American Legion Auxiliary web application interface. At the top, there is a logo and the text "American Legion Auxiliary" and "Welcome, Bonnie Vest Jump 7". Below this is a navigation menu with "Task Center", "Members", "Unit", "Department", and "Help". A breadcrumb trail shows "Members > Edit Member Info > Edit Member Profile". The main content area displays "MD UNIT 0022". There is a "Filter:" dropdown menu currently set to "-All-" and a "Find:" search input field. Red arrows point to these fields with the text "Filter for Senior or Junior Members" and "To search for a member, type any part of the first or last name". Below the filter and search fields is an "Indexes" section with letters A through O. The member profile for "Adair, Hazel" is shown, including an email address "hazeladair@gmail.com", membership number "#123456789", and paid thru date "12/31/2018". At the bottom of the profile are three yellow buttons: "EDIT PROFILE", "MEMBER ACTIVITY", and "MEMBER CHANGE HISTORY".

Step 3: View/Edit Member Profile Information

To view/edit the profile information for a member, click

[Edit Profile](#)

[RETURN TO ROSTER](#)

Member	Address	Background	Personal	Communication
Membership ID	123456789			
First Name	Jane			
Middle Name				
Last Name	Doe			
Membership Type	MAM			
Membership Status	A			
Membership Category				
Home Phone				
Cell Phone	(123) 456-7890			
Work Phone				
Email Address	test@test.com			
Save		Cancel		

Member profile data is divided into 5 tabs:

- Member
- Address
- Background
- Personal
- Communication

Each tab displays different fields, some of which can be edited by Units and others are Read-Only. To make a change to a field, type over the current data and click **Save**. To go back to the roster, click **Return To Roster**.

Please see the following table for a list of all fields available to view in the ALA MIS and which ones Units have rights to change.

MEMBER DATA/FIELD LIST

MEMBER TAB

Field
Membership ID
First/Middle/Last Name/Informal First Name
<p>Membership Type Description</p> <ul style="list-style-type: none"> • MAM – Senior Member • MYM – Junior Member • XAM – Expired Member <i>(expired 2 years or less)</i> • XYM – Expired Junior Member <i>(expired 2 years or less)</i>
<p>Membership Category Description</p> <ul style="list-style-type: none"> • HLM – Honorary Life Member • SLM – State Life Member (CO, NE, ND states ONLY) • VIM – Paid Up For Life
Home Phone
Cell Phone
Email Address

ADDRESS TAB

Field	Note/Membership Action**
Permanent Address	
Alternate Address	
Seasonal Address	After putting in the Seasonal address, you MUST go to the Communications tab and enter the Seasonal Date information.

BACKGROUND TAB

Field	Note/Membership Action**
<i>Join Date</i>	<i>Contact NHQ to change</i>
<i>Continuous Years</i>	
<i>Initial Unit</i>	
<i>Current Unit</i>	<i>Department must complete a Transfer Action to change</i>
<i>Current Dept</i>	
War Era	
Branch Service/Legion Information	
Related Type	
<i>Veteran related Thru</i>	

PERSONAL TAB

Field	Note/Membership Action**
Marital Status	
Date of Birth	
Age in Years	<i>Change the date of birth to alter age in years</i>

COMMUNICATION TAB

Field	Note/Membership Action**
Magazine Preference	If an email address is entered, a member can receive a link to go online and view magazine vs. a physical copy.
No Magazine	
No Mail	
No Department Publication	
No Solicitation	
No Calls	
Season End Day	For seasonal addresses – Enter the Begin and End Month and Day. The Preferred mail address will change used during this time every year
Season End Month	
Season Begin Day	
Season Begin Month	
Temp Seasonal	
No Renewal	
No Email Renewal	

Note: All changes made by the National Headquarters, the Department, Unit or Member will be listed in the Change Log – A report that details every change made in the system – What the old data was, the new data, when the change was made and who made it.

VIEW MEMBER ACTIVITY

Step 4: View Member Activity

To view a list of member activities, click [Member Activity](#)

This is a report of all of activities for an individual member. Activities included in this report are: dues payments, changes to leadership positions and committees, continuous year adjustments, and event attendance.

Individual Activity Report

Olivia Test Member # 123456789 Printed 3/14/2018

ACTIVITY	TRANSACTION DATE	EFFECTIVE DATE	PRODUCT CODE	DESCRIPTION	SOURCE SYSTEM	AMOUNT	NOTE
Dues Payments	12/20/2017	1/1/2018	CHAPT/18U0001AK	2018 AK UNIT 0001	DUES	\$0.00	
Dues Payments	12/20/2017	1/1/2018	CHAPT/18DAK	2018 DEPT OF	DUES	\$0.00	
Dues Payments	12/20/2017	1/1/2018	18NATL	2018 National Dues	DUES	\$9.00	
Dues Payments	1/3/2017	1/1/2017	CHAPT/17U0001AK	2017 AK UNIT 0001	DUES	\$0.00	
Dues Payments	1/3/2017	1/1/2017	CHAPT/17DAK	2017 DEPT OF	DUES	\$0.00	
Dues Payments	1/3/2017	1/1/2017	17NATL	2017 National Dues	DUES	\$9.00	
Continuous	2/3/2016		2016	ALA.ContinuousYear	CSI	\$0.00	
Continuous Years Adjustment	2/2/2016					(\$1.00)	missing 2016 to 2015 dues
Dues Payments	4/8/2014	1/1/2014	14NATL	2014 NATIONAL	DUES	\$9.00	
Membership	4/8/2014	3/31/2014	JOIN			\$0.00	
Dues Payments	4/8/2014	1/1/2014	CHAPT/14DAK	2014 DEPT OF	DUES	\$0.00	
Dues Payments	4/8/2014	1/1/2014	CHAPT/14U0001AK	2014 AK UNIT 0001	DUES	\$0.00	
Transaction for the ICE Application	4/8/2014	3/31/2014	MEM_JOIN			\$0.00	Finish: Completed (04/08/2014)

VIEW MEMBER CHANGE LOG

Step 5: View Member Change History

To see a list of the changes that have been made to this members profile/record, click [Member Change History](#)

Member Change Log

Olivia Test Printed 3/7/2018

ID	DATE TIME	SUB TYPE	USER ID	LOG TEXT
123456789	11/7/2017	CHANGE	SCRIPT	Demo_Personal.PE_CAL_AGE_YE
123456789	7/26/2017	CHANGE	2	NAME.MIDDLE_NAME: Anne ->
123456789	7/26/2017	CHANGE	2	NAME.MIDDLE_NAME: -> Anne
123456789	6/28/2017	CHANGE	TWIGGINS	Name.STATUS: D -> A
123456789	6/28/2017	CHANGE	TWIGGINS	Name.STATUS: A -> D
123456789	6/28/2017	CHANGE	123654987	NAME.MIDDLE_NAME: L. ->
123456789	12/11/2016	CHANGE	NCOAUPDATE	Name.FULL_ADDRESS: 2221
123456789	12/11/2016	CHANGE	NCOAUPDATE	Name.ZIP: 99504 -> 99504-
123456789	12/11/2016	CHANGE	NCOAUPDATE	Name_Address.FULL_ADDRESS
123456789	12/2/2016	CHANGE	ALA.Continuo	Demo_Individual.IN_CONT_YR_D
123456789	12/2/2016	CHANGE	csi_sp_Memb	Name.JOIN_DATE: ->
123456789	12/2/2016	CHANGE	csi_sp_Memb	Demo_Individual.IN_CURRENT_D
123456789	12/2/2016	CHANGE	csi_sp_Memb	Name.MEMBER_TYPE: PAM ->
123456789	12/2/2016	CHANGE	SCRIPT	Demo_Personal.PE_CAL_AGE_YE
123456789	12/2/2016	CHANGE	SCRIPT	Demo_Personal.PE_BIRTH_DAY:
123456789	12/2/2016	CHANGE	SCRIPT	Demo_Personal.PE_BIRTH_MON
123456789	12/2/2016	CHANGE	SCRIPT	Demo_Communication.CO_CELL
123456789	12/2/2016	CHANGE	SCRIPT	Name.COMPANY_SORT:
123456789	12/2/2016	CHANGE	123654987	Test, Olivia, American Legion

UNIT TAB

8

EDIT UNIT LEADERS**Guidelines**

ALA policies state that in order to be selected for a leadership position, a member must be in good standing and dues must be paid current. In order to edit leaders for a Unit, you will need to know the name of the member, their leadership position and the effective dates.

Processing**Step 1: Navigation**

[Unit] → Edit Unit Leaders

Step 2: Action Steps**1. Selection**

The list that displays contains all available Unit level leadership positions and the leaders currently assigned to those positions.

Unit Leadership Positions as of December 1, 2017

Unit President	Unit Finance Chairman
Unit Vice President	Unit Girls State Chairman/Director
Unit Secretary	Unit Junior Activities Chairman
Unit Treasurer	Unit Leadership Chairman
Unit Chaplain	Unit Legislative Chairman
Unit Historian	Unit Liaison Child Welfare Foundation Chairman
Unit Dues Remit	Unit Membership Chairman
Unit AEF Chairman	Unit National Security Chairman
Unit Americanism Chairman	Unit Past Presidents Parley Chairman
Unit Cavalcade Of Memories Chairman	Unit Poppy Chairman
Unit Children & Youth Chairman	Unit Public Relations Chairman
Unit Community Service Chair	Unit Sergeant-At -Arms
Unit Constitution & Bylaws Chairman	Unit UD&R Chairman
Unit Director of Hospital Volunteers	Unit VA & R Chairman
Unit Education Chairman	Unit VAVS Representative
Unit Field Service Director	

To edit or assign new leaders, select the positions that will change by checking the box next to the position and click continue.

<input checked="" type="checkbox"/>	Unit AEF Chairman
<input type="checkbox"/>	Unit Americanism Chairman
<input checked="" type="checkbox"/>	Unit Cavalcade Of Memories Chairman
<input type="checkbox"/>	Unit Children & Youth Chairman
<input type="checkbox"/>	Unit Community Service Chr
<input checked="" type="checkbox"/>	Unit Constitution & Bylaws Chairman
<input type="checkbox"/>	Unit Director Of Hospital Volunteers
<input type="checkbox"/>	Unit Education Chairman
<input checked="" type="checkbox"/>	Unit Field Service Director
<input type="checkbox"/>	Unit Finance Chairman

2. Additional Information

Click the Find a Member link next to the leadership position to assign a new leader to each position or to mark a position vacant – do this one position at a time.

Overview
 Selection
 Additional Info
 Validation
 Receipt

PREVIOUS
Step: Additional Info
CONTINUE

(Selection)
(Validation)

Position	New Officer	Additional Information
Unit AEF Chairman	Find a Member	
Unit Cavalcade Of Memories Chairman	Find a Member	
Unit Constitution & Bylaws Chairman	Find a Member	
Unit Field Service Director	Find a Member	

PREVIOUS
Step: Additional Info
CONTINUE

(Selection)
(Validation)

The following Dialog Box will appear. Enter search criteria to find the member. Click the checkbox to select the member for the position.

First Name

Last Name

Member Number

SEARCH

Vacant Position

No records to display.

The selected members name will appear next to the position title. Repeat for each leadership position and fill in the appropriate effective date.

Position	New Officer	Additional Information
Unit AEF Chairman	Vacant Position	* Date: 3/19/2018 Apply To All
Unit Cavalcade Of Memories Chairman	Vacant Position	* Effective Date: 3/19/2018 Apply To All
Unit Constitution & Bylaws Chairman	Vacant Position	* Effective Date: 3/19/2018 Apply To All
Unit Field Service Director	Vacant Position	* Effective Date: 3/19/2018 Apply To All

Please Note: If changing the Unit Dues Remit person, please be sure to change the Unit Remit to address as shown on the next page.

Note: The effective date you put in will be entered as both the end date for the old position holder and the begin date for the new position holder. For this reason, leadership reports ran the day of the position change may show both leaders. If you need an accurate leadership report the day of the position change, send the request to the ALA MIS helpdesk.

3. Validation

Please review the information to ensure accuracy and enter your electronic signature exactly as it appears on the screen. Then click “Continue” to submit your transaction.

4. Receipt

You have successfully changed the leadership positions for this Unit.

Please allow 15-20 minutes for the changes to take effect and overnight before running any leadership report.

EDIT UNIT INFORMATION

Step 1: Navigation

[Unit] → Edit Unit Profile

Step 2: Edit Profile

The Unit profile data is divided into 2 tabs:

- Unit Contact
- Unit Info

Each tab displays different fields, some of which can be edited by Units and others are Read-Only. The following list contains each field and security settings for each. To make a change, type over the information in the field and click SAVE at the bottom of the window.

Unit Data Field Information

UNIT CONTACT TAB

UnitContact
UnitInfo

Unit Number

Legal Name

Permanent

Address 1

Address 2

Address 3

City

State

ZipCode

Country

Preferred Mail

Preferred Bill

Preferred Ship

Remit to Address for Membership Dues

Address 1

Address 2

Address 3

City

State

ZipCode

Country

Preferred Mail

Preferred Bill

Preferred Ship

Phone

Fax

Email Address

Website

Field	Dept Edit	Unit Edit	Note/Membership Action**
<i>Unit Number</i>	<i>No</i>	<i>No</i>	<i>Cannot be changed</i>
<i>Legal Name</i>	<i>No</i>	<i>No</i>	<i>Can only be changed by National</i>
<i>Permanent Address</i>	<i>No</i>	<i>No</i>	
Remit to Address for Membership Dues	Yes	Yes	This is the address where Unit dues are sent
Phone	Yes	Yes	
Fax	Yes	Yes	
Email Address	Yes	Yes	
Website	Yes	Yes	

UNIT INFO TAB

UnitContact		UnitInfo	
# Jr Members		7	
# Sr Members		114	
# VIM members		5	
# Paid Dues Members		121	
# Unpaid Dues Members		0	
E Unit		<input type="checkbox"/>	
Widow Unit		<input type="checkbox"/>	
EIN Number		92-6002383	
Legal Name		Jack Henry	
Division/District/County			
Division/District/County			
Charter Date		6/22/1923	
Unit Number		0001	
Dept		102	
		Save	Cancel

Field	Dept Edit	Unit Edit	Note/Membership Action**
# Jr Members	Yes	Yes	All of these fields are calculated nightly and can be changed by the Unit/Department by performing various membership actions – i.e. paying dues, adding members, etc.
# Sr Members	Yes	Yes	
# VIM members	Yes	Yes	
# Paid Dues Members	Yes	Yes	
# Unpaid Dues Members	Yes	Yes	
E Unit	Yes	No	
Widow Unit	Yes	No	
EIN Number	No	No	Can only be changed by National
Unit Info Legal Name	No	No	
Division/District/County	No	No	
Division/District/County	No	No	
Charter Date	No	No	
Unit Number	No	No	Cannot be changed
Department	No	No	Cannot be changed

UNIT REPORTS

Unit reports are updated, added to, or deleted on a regular basis.

Dues Reports by Year

UNIT DUES ACTIVITY REPORT

Includes a list of all members that have paid dues to the unit, whether still in the unit, transferred to another unit, or have passed away.

UNIT PAID DUES ROSTER

Includes a list of all currently paid members in the unit. This report is different than the Unit Dues Activity Report.

UNPAID DUES ROSTER REPORT

Includes a list of all members who have not paid dues for the year that you selected.

Additional Reports

UNIT DUES PAID ONLINE

Is a listing of all members who have either paid their dues online or by phone to NHQ.

LEADERSHIP ROSTER

Includes the names and contact information for the unit leaders. To edit see page 17 of this manual

MEMBERSHIP ROSTER

Includes all current members in the unit, including juniors.

DECEASED MEMBER REPORT

Includes a list of deceased members for the time frame you request

EXPIRED MEMBER ROSTER

INCLUDES ANY MEMBER that has not paid for the current and prior year.

FORMER MEMBER ROSTER

Includes any member that has not paid for the current, and two prior years or longer.

PENDING MEMBER ROSTER

Includes all new members that have been entered by either the Unit or Department that have not been fully processed (Paid to National).

REPORTS OVERVIEW

This is a general overview of ALA MIS Reports. Please see the unit report section for a detailed list of all the reports, descriptions, uses, etc.

Step 1: Navigation

Navigate to the Report. Unit Reports are located under the Unit Tab.

Step 2: Select Report

Example: [Unit] → Unit Reports → 2018 Reports → Unit Paid Dues Roster

On the Report toolbar, you can scroll through the pages using the right and left arrows, adjust the size of the page view, search for a record in the report, export all records, refresh the data or send the report to print.

Use these buttons to navigate through multiple page reports

Refresh

Export report to Excel, Word, or as a PDF

Find text in the report

EXPORT A REPORT

To Export a Report to Excel, Word, or a PDF document

1. Navigate to Report
2. Filter and sort report as needed
3. Click square that has a white box with the arrow inside of it and then select the desired format

Begin Date: 7/1/2017 Thru Date: 6/1/2018 View Report

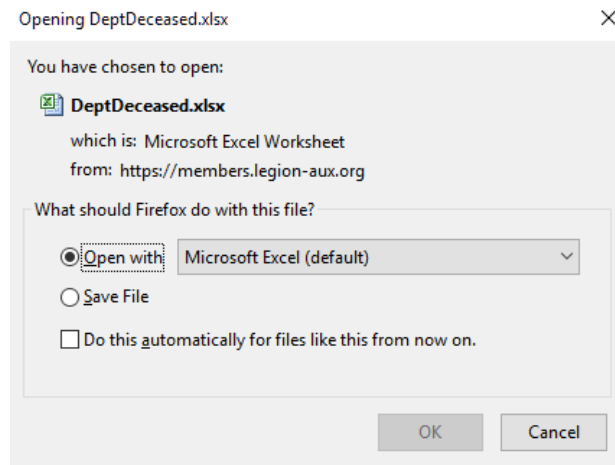
1 of 2 ? Refresh 100% Find | Next

Department Deceased Member

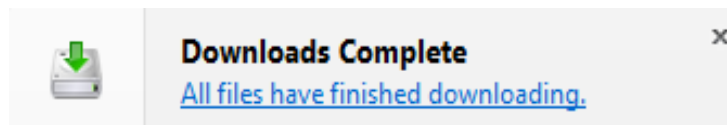
IN CURRENT DEPT	GEOZONE 1	GEOZONE 2	ID	MEMBER NAME	CATEGORY	MEMBER TYPE	DECEASED DATE	CITY	STATE
MD									

- Word
- Excel
- PowerPoint
- PDF
- TIFF file
- MHTML (web archive)
- CSV (comma delimited)
- XML file with report data
- Data Feed

This will open the below Dialog Box. Choose Open or Save File



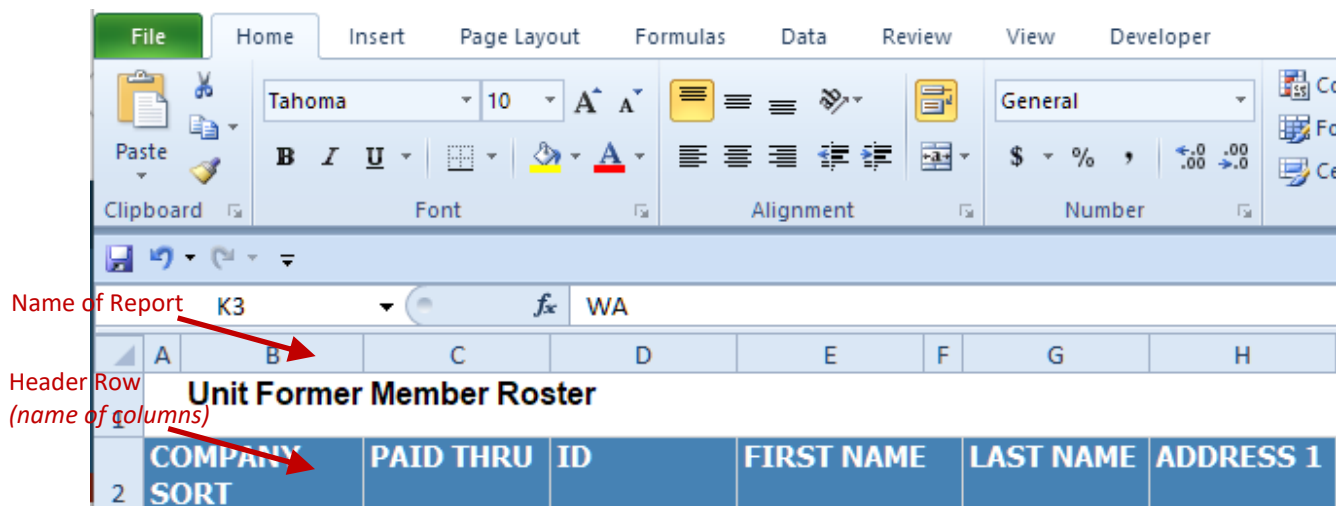
4. Depending on the browser, the message below (or similar) could appear on your screen.



- 5. Select your File Export or wait for it to pop up on your screen.
- 6. The file will open in Microsoft Excel, Word, or Adobe PDF.

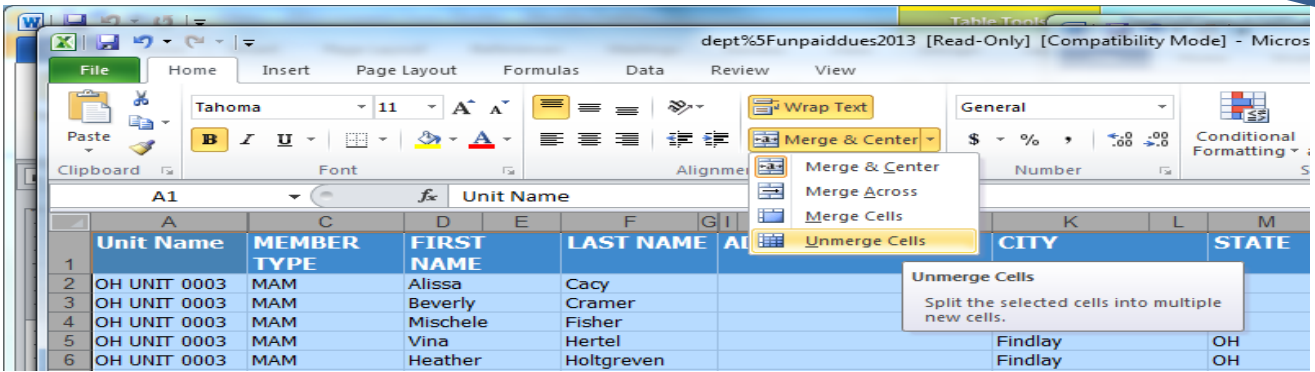
Excel

Excel exports will open up an Excel spreadsheet.

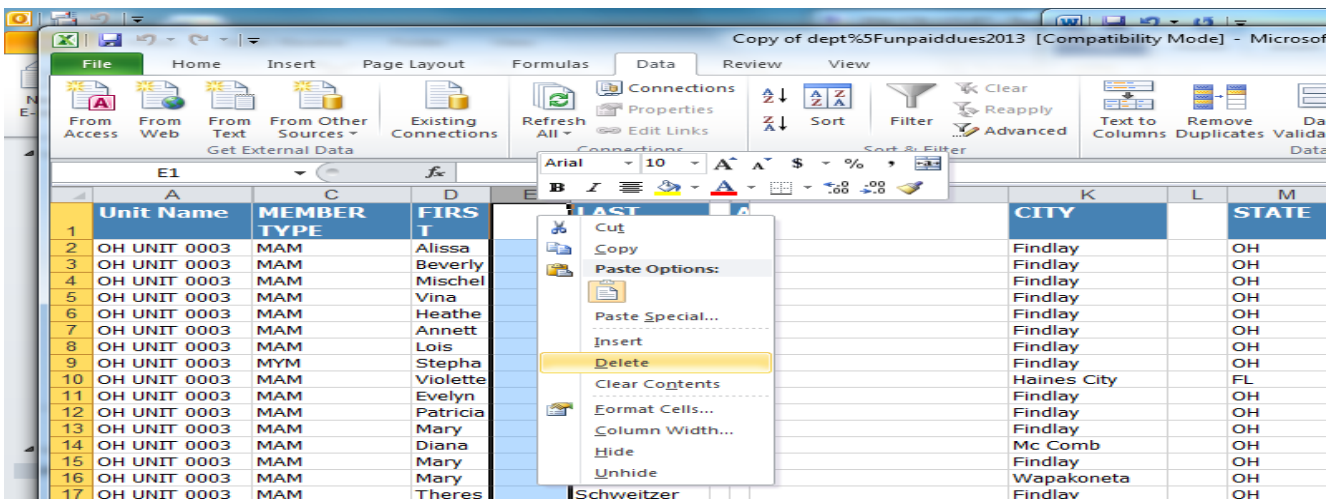


The name of the report will usually appear in row 1. The name of the department or unit will usually appear in row 2. Additional rows may have more detailed information. If you want to sort your data, then you will need to delete the first couple of rows so only the header row appears in Row 1 and the remaining rows contain data. To delete the entire row (rows 1-3 and row 5) you need to select it and then right-clicking and select DELETE.

Next, you will need to unmerge the cells. To unmerge cells, go to your Home menu and go to Merge & Center in the Alignment section and choose Unmerge cells.



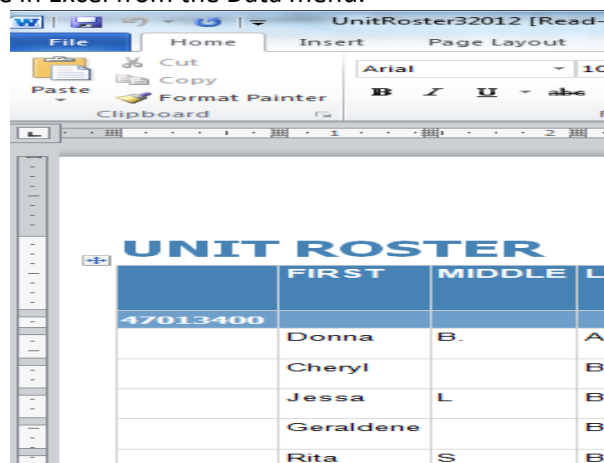
Next, you will need to delete any blank columns you may have. These columns don't have a header name. To do this, select the column, right-click and choose DELETE.



Save your file by hitting SAVE AS and naming your document in a location you will remember. Now you should be able to sort your data in Excel or even do a mail merge from Word.

Word

Word exports will open up a Word document. You can delete rows with this format, but you will not be able to sort your data. Sorting can be done in Excel from the Data menu.



PDF

PDF exports will open up a PDF document in Adobe. You cannot edit data with this format.

CO MEMBER TYPE	First Name	Last Name	Member Type
Former Members			
	Daryl	Masi	FAM
	Thelma	Wright	FAM
	Dona	Groves	FAM

HELP TAB

10

Training Materials

Training materials and videos on a variety of tasks and membership actions can be found under the Help/Request Help tab (this will take you to www.ALAforVeterans.org, you will login with the same credentials you used for ALA MIS) and you will be taken directly to the ALA MIS Help Ticket, scroll down the page to find the video you are looking for.

Helpdesk Emails

If you need assistance using the ALA MIS, check for solutions in the applicable section of the Training Materials. If you still need assistance, please contact the Helpdesk via phone: (317) 569-4536 or email: alamishelp@legion-aux.org

When sending an email, please be sure to include the following:

- Your name
- Department
- What browser were you using? Example: Mozilla Firefox, Internet Explorer, Safari, etc.
- What were you doing when you encountered the issue? Example: I was on the Checkout step of paying dues, I was trying to run the Dues Reconciliation Report, I was trying to update an address, etc.
- If you encounter an error message, please note the exact time the error occurred.
- If at all possible, please include a member name and membership ID tech support can reference.

NOTE:

Using the Helpdesk Email and Phone line instead of individual staff members phones/emails allows ALA MIS issues to filter through ONE source. This helps us to identify trends/common issues more quickly, prioritize needs, track issues, and improves response times while minimizing duplication of efforts among staff. Sending your ALA MIS issues directly to staff phones, emails or both ultimately results in slower response times and ineffective service.

NOTES