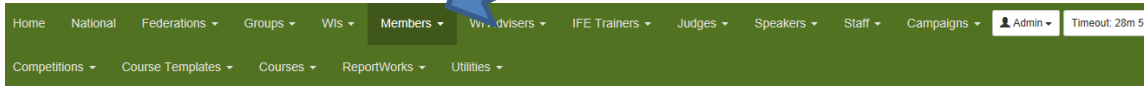


Contents

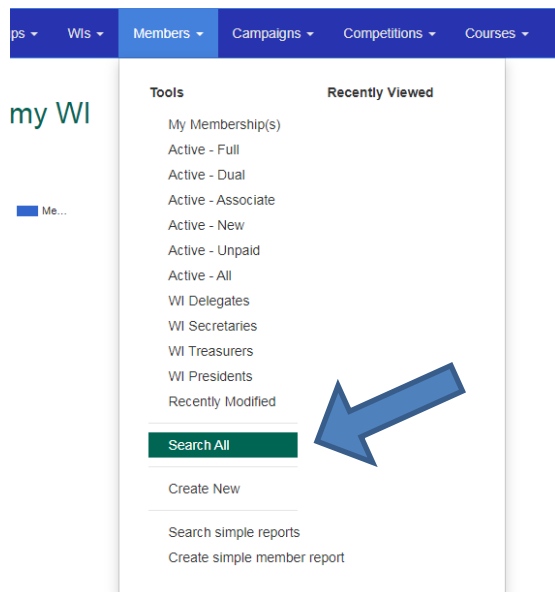
1 SEARCHING FOR A MEMBER	2
2 SEARCHING FOR A WI	4
3 ADDING A NEW MEMBER.....	6
4 HOW TO ADD A DUAL MEMBER	9
5 ADDING AND REMOVING A MEMBER'S POSITION.....	13
6 HOW TO REMOVE A MEMBER'S POSITION	16
7 HOW TO CHANGE A MEMBER'S WI (for federations only).....	19
8 HOW TO UPLOAD A DOCUMENT OR WEB LINK	21
9 SEARCHING FOR A POSITION.....	25
10 HOW TO CONVERT LIST TO EXCEL FILES.....	27
11 HOW TO REMOVE A MEMBER.....	28
12 HOW TO ADD A NEW USER (Federations only)	31
13 HOW TO CHANGE A MEMBER'S PASSWORD (Federations only)	32
14 HOW TO REMOVE A DUAL MEMBER FROM A WI.....	35
15 HOW TO PRODUCE REPORTS	39
16 HOW TO FIND YOUR LIST OF MEMBERS	43
17 HOW TO CHANGE A MEMBER'S SECURITY SETTINGS (Federations only)	47
18 HOW TO REINSTATE A MEMBER	49
19 HOW TO MARK A GROUP OF MEMBERS AS PAID	51
20 HOW TO PUT A MEMBER'S RECORD ON HOLD	52
21 HOW TO FIX DUPLCATES (Federations only)	53

1 SEARCHING FOR A MEMBER

Click on Members at the top of the page



Then choose Search All from the menu



Find your member by typing her details into the search form

Search for Members

Please specify your search criteria below, then click 'Search'

Search Criteria

Search For All visible to me

First Name Latel

Surname Monks

Reference

Member Belongs To Search All National Federation/WI

Federation Buckinghamshire

WI [Please select...]

Address Line 1

County

Post Code

Email

Telephone

WI Position [Please select...]

Federation Position [Please select...]

National Position [Please select...]

Member Type [Please select...]

Member Status Active

Status Reason [Please select...]

And clicking on Search at the bottom of the page

Member Status

Preferred Contact Method [Please select...]

Media Friendly? Yes No Not Known

Profession [Please select...]

Other Profession

Skill [Please select...]

Other Skill

Subscribes to Publication [Please select...]

Expiry Date to

Date Joined to

Is Delegate? Yes No Not Known

Created By

Created Date to

Modified By

Modified Date to

When the search results appear, click on the one you want by clicking the green section of the line ie

Members Search Results

l.monkstest@nfwi.org.uk Logout Timeout: 29m 55s (Reset) Help

Search:

Relationship	Reference	Type	Status	First Name	Surname	Federation	WI	Post Code	Select
Monks, Latel BUC19500641932	00641932	Full	Active	Latel	Monks	Buckinghamshire	Dummy WI	SL0 0RN	<input type="checkbox"/>

Showing 1 to 1 of 1 entries

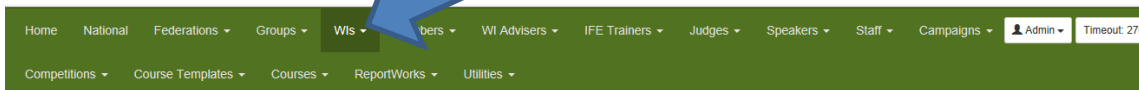
Previous 1 Next

This will then open the member's full record.

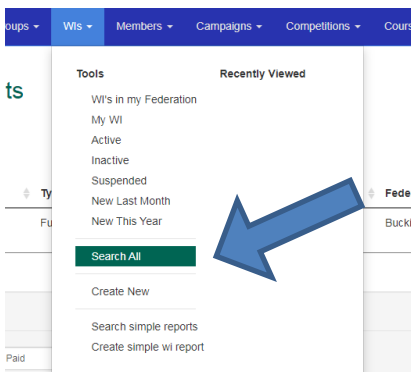
Updated: July 2023

2 SEARCHING FOR A WI

Click on WIs at the top of the page



Then choose Search All from the menu



Find the WI by typing the details into the search form

Search for WIs

Please specify your search criteria below, then click 'Search'

Search Criteria

- Search For: All visible to me
- Federation: [Please select..]
- WI Reference: []
- WI Name: Dummy WI
- Status: Active
- Status Reason: [Please select..]
- Status Date: [] to []
- Type: [Please select..]
- Federation Group: [Please select..]
- Town: []
- County: []

And clicking on Search at the bottom of the page

Interest: [Please select..]

Other Interests: []

Created By: []

Created Date: [] to []

Modified By: []

Modified Date: [] to []

When you have found the WI you want, click on the WI name to open the record

WIs Search Results

I.monkstest@nfwi.org.uk Logoff Timeout: 29m 57s (Reset) Help

10 records per page Search: []

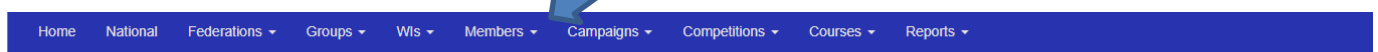
WI	Federation	Federation Group	Status	Status Reason	Status Date	Select
Dummy WI	Buckinghamshire		Active		18/09/2019	<input type="checkbox"/>

Showing 1 to 1 entries

Previous 1 Next

3 ADDING A NEW MEMBER

Click on Members at the top of the page



This will open a box:
Click on 'Create New'

Home National Federations Groups Wis Members Campaigns Competitions Courses Reports

Information for WI : Dummy WI

Tools

- My Membership(s)
- Active - Full
- Active - Dual
- Active - Associate
- Active - New
- Active - Unpaid
- Active - All
- WI Delegates
- WI Secretaries
- WI Treasurers
- WI Presidents
- Recently Modified

Recently Viewed

Search All

Create New

Search simple reports

Create simple member report

↓ Lmoni

Here you enter the new member's first name, surname and postcode. Then click on 'Check for duplicates'

Home National Federations Groups Wis Members Campaigns Competitions Courses Reports

Create New Member

Save

Status Info

Reference:

Status: Active

Status Date:

Contact Details

Title: [Please select...]

First Name: Joanne

Surname: Bloggs

Post Code: sw6 4ly **Check for duplicates**

Address 1:

Address 2:

Address 3:

Town:

County:

Country:

Address needs: Yes No

Once you have clicked on Check for Duplicates, if there are members with similar details, you will see a dropdown box. Click on the arrow at the end to show you a list of these members.

Contact Details

Title: [Please select...]

First Name: Joanne

Surname: Bloggs

Post Code: sw6 4ly **Check for duplicates**

Please check possible duplicate members

[Please select...]

Address 1:

Address 2:

If the person you are adding is already a member she should show up on this list. If not, select 'Not a Duplicate' from the top of the list. You will then be given another dropdown menu where you are asked to select the new member's address

The screenshot shows a 'Contact Details' form with the following fields and values:

- Title: [Please select...]
- First Name: Joanne
- Surname: Bloggs
- Post Code: sw6 4ly (with a 'Check for duplicates' button)
- Address Selection: A dropdown menu is open, showing a list of addresses starting with '104 New Kings Road, LONDON, SW6 4LY'. The top option is 'Not Shown'.

Once you have selected the correct address it will enter the information in the relevant boxes for you.

The screenshot shows the 'Contact Details' form with the following populated fields:

- Title: [Please select...]
- First Name: Joanne
- Surname: Bloggs
- Post Code: SW6 4LY (with a 'Check for duplicates' button)
- Address 1: 104 New Kings Road
- Address 2: [Empty]
- Address 3: [Empty]
- Town: LONDON
- County: [Empty]
- Country: [Empty]

You will then need to add their federation and WI. You can then enter as much more information as you want in the other boxes.


When you get to the bottom you will need to confirm the data protection sections have been adhered to. You will need to enter the date the member filled in the WI Member Registration form and tick the boxes to confirm that the member filled in the form herself and that it was the latest version

Data Protection

Once a new WI member has completed the WI Member Registration Form it is important that it is kept securely until it is entered into the MCS, after which point it should be destroyed.

It is also important for new WI members to complete the registration form themselves so they are fully aware of what information we collect, why, and what their rights are.

To the best of your knowledge please provide and confirm the following information:

- ❗ The paper WI Member Registration Form was filled in on 
- ❗ The member completed the form herself, or if assistance was required the data processing details were explained to her in full
- ❗ The member completed the latest version of the standardised WI Member Registration Form as published by the NFWI, and available to download via: [here](#)

Please do not submit this record until all three points above are accurate and correct.

You can then click on Save at the bottom

Please note:

If you enter a member's email address in the email box, she will automatically be sent an email, explaining how to log onto the My WI website

4 HOW TO ADD A DUAL MEMBER

Click on Members at the top of the page

Updated: July 2023



This will open a box:
Click on 'Create New'

The screenshot shows the 'Members' dropdown menu. The 'Create New' button is highlighted with a blue arrow. The menu also includes options like 'My Membership(s)', 'Active - Full', 'Active - Dual', 'Active - Associate', 'Active - New', 'Active - Unpaid', 'Active - All', 'WI Delegates', 'WI Secretaries', 'WI Treasurers', 'WI Presidents', 'Recently Modified', 'Search All', 'Search simple reports', and 'Create simple member report'.

Here you enter the new member's first name, surname and postcode. Then click on 'Check for duplicates'

The screenshot shows the 'Create New Member' form. The 'Check for duplicates' button is highlighted with a blue arrow. The form includes sections for 'Status Info' and 'Contact Details'. The 'Contact Details' section has fields for Title, First Name (Lalei), Surname (Monks), Post Code (s10 0m), and three Address fields.

If the member is already correctly listed as a full member at another WI, she will appear in this dropdown list:

Contact Details

Title [Please select...]

First Name Latel

Surname Monks


Post Code SL0 0RN Check for duplicates

Address 1 [Please select...]
 [Please select...]
 Not a duplicate
 Jones, Jill, 299 Longstone Road,
 Monks, Latel, 299 Longstone Road, Amersham Angels (Active - Full)

Address 2

Address 3

Please check possible duplicate members



You will see a box appear which just tells you that dual members are not shown in the paid members figures. Just click on OK to continue. It will then enter the rest of the member's details in the boxes for you

Contact Details

Title [Please select...]

First Name Latel

Surname Monks

Post Code SL0 0RN Check for duplicates

Address 1 299 Longstone Road

Address 2

Address 3

Town IVER

County Buckinghamshire

Country

Copy Address

Address needs verification Yes No

It will then automatically enter the member as a dual member

Membership Details

Member Belongs To National Federation/WI

Federation [Please select...]

WI [Please select...]

Member Type Dual


Date Joined 19/09/2019

2018 Paid

Reminder History

Notes

Please note that dual members are not shown in the paid members figures.



Select the federation and WI from the dropdown boxes, then scroll to the bottom to fill out the Data Protection section


When you get to the bottom you will need to confirm the data protection sections have been adhered to. You will need to enter the date the member filled in the WI Member Registration form and tick the boxes to confirm that the member filled in the form herself and that it was the latest version

Data Protection

Once a new WI member has completed the WI Member Registration Form it is important that it is kept securely until it is entered into the MCS, after which point it should be destroyed.

It is also important for new WI members to complete the registration form themselves so they are fully aware of what information we collect, why, and what their rights are.

To the best of your knowledge please provide and confirm the following information:

- The paper WI Member Registration Form was filled in on 
- The member completed the form herself, or if assistance was required the data processing details were explained to her in full
- The member completed the latest version of the standardised WI Member Registration Form as published by the NFWI, and available to download via: [here](#)

Please do not submit this record until all three points above are accurate and correct.

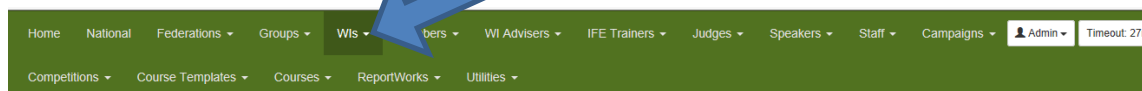
You can then click on Save at the bottom

Please note:

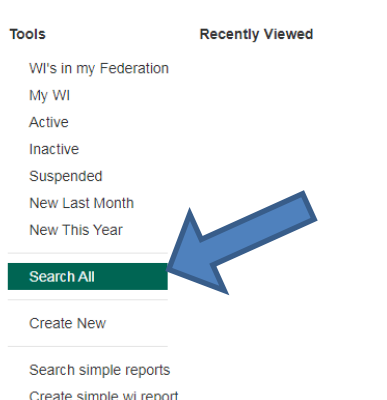
If you enter a member's email address in the email box, she will automatically be sent an email, explaining how to log in

5 ADDING AND REMOVING A MEMBER'S POSITION

Click on WIs at the top of the page



Then choose Search All from the menu



Find the WI by typing the details into the search form

Search for WIs

Please specify your search criteria below, then click 'Search'

Search Criteria

- Search For**: All visible to me
- Federation**: [Please select..]
- WI Reference**: [Please select..]
- WI Name**: Dummy WI
- Status**: Active
- Status Reason**: [Please select..]
- Status Date**: [] to []
- Type**: [Please select..]
- Federation Group**: [Please select..]
- Town**: []
- County**: []
- Summer Meeting Time**: [Please select..]
- Winter Meeting Time**: [Please select..]

And clicking on Search at the bottom of the page

When you have found the WI you want, open it by clicking on the WI name

WIs Search Results

testngemail@hotmail.com Timeout: 29m 59s (Reset)

Search: []

WI	Federation	Federation Group	Status	Status Reason	Status Date	Select
Dummy WI	Buckinghamshire		Active		18/09/2019	<input type="checkbox"/>

Showing 1 to 1 of 1 entries

When you have opened the WIs record, click on Positions in the Sections box

WI's Details - Dummy WI

testingemail@hotmail.com Logoff Timeout: 29m 52s (Reset) Help

Save

WI Status Info

WI Reference: 195

Status: Active

Status Date: 18/09/2019 09:48

Basic Details

WI Name: Dummy WI

Sections

- Basic Details
- Members
- Positions
- WI Comp...
- WI Camp...

Tools

- Search for WIs
- Create New WI
- Search simple WI reports
- Create simple WI report

This will then show you a list of all positions held within this WI

To add a position for someone else, click on Add Position to WI at the bottom

Positions Held at this WI

All records per page Search:

Position	Member	Status	Effective From Date
President	Horler K	Active	15/03/2004
Secretary	Glanfield J	Active	15/03/2004

Showing 1 to 2 of 2 entries Previous 1 Next

Add Position to WI

Another window will then open up, where you will assign the new position to a member

In the 'Position' dropdown menu, select the position you want to assign

Position held at WI

Group: [Please select...]

Position: [Please select...]

- Minutes Secretary
- Newsletter Editor
- Outings Organiser
- PAL Rep
- Posters
- President
- Press Officer
- Programme Secretary
- Raffle organiser
- Refreshment organiser
- Register taker
- Resolutions Adviser
- Rota Organiser
- Secretary
- sick visitor
- Social Media Rep
- SWIN Delivery
- Trading Stall organiser
- Treasurer
- Vice President

Effective From Date

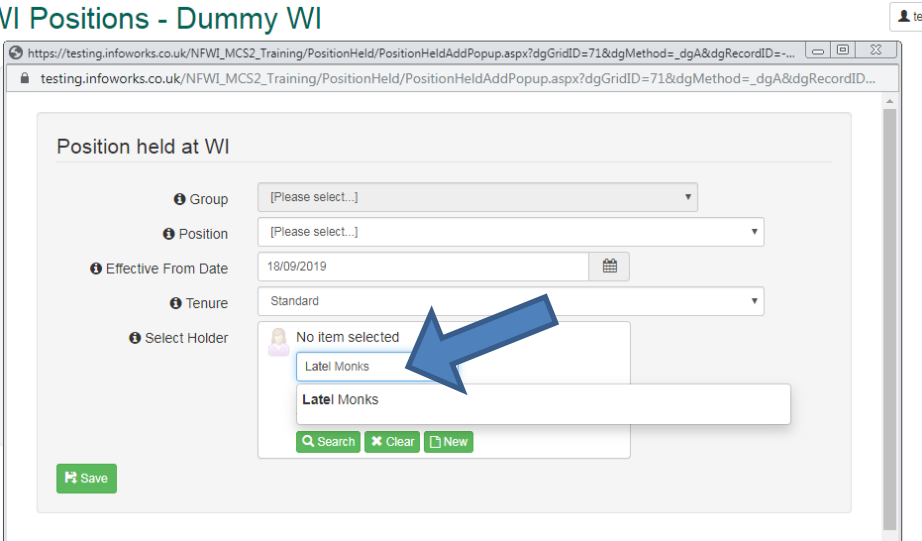
Tenure

Select Holder

Save

Then in the 'Select Holder' box, start to type in the name of the member you want to assign the position to, and click on the name when it comes up

VI Positions - Dummy WI

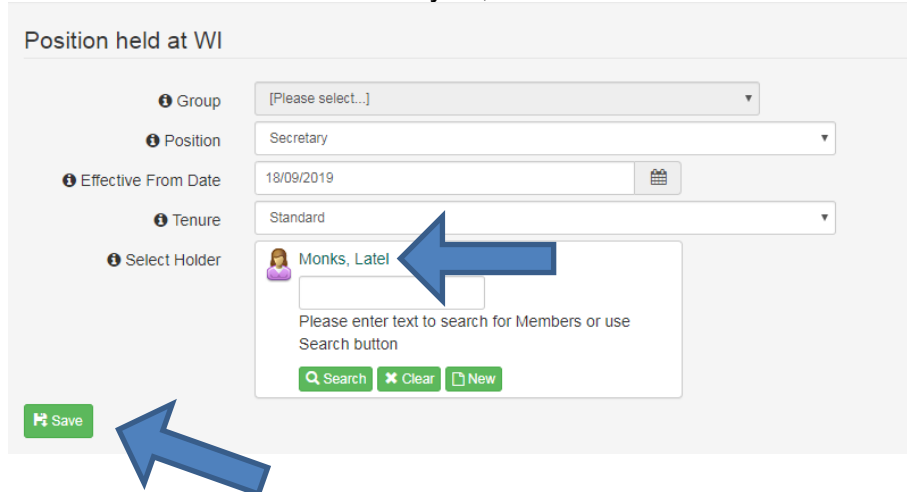


The screenshot shows a web browser window with the URL https://testing.infoworks.co.uk/NFWI_MCS2_Training/PositionHeld/PositionHeldAddPopup.aspx?dgGridID=71&dgMethod=_dgA&dgRecordID=-.... The page title is "Position held at WI". The form contains the following fields:

- Group: [Please select...]
- Position: [Please select...]
- Effective From Date: 18/09/2019
- Tenure: Standard
- Select Holder: A dropdown menu is open, showing "No item selected" at the top, followed by "Latel Monks" (highlighted with a blue arrow), and "Latel Monks" below it. Below the list are "Search", "Clear", and "New" buttons.

A green "Save" button is located at the bottom left of the form.

It will then enter the name for you, then click on Save at the bottom



The screenshot shows the same "Position held at WI" form, but with the following changes:

- Position: Secretary
- Effective From Date: 18/09/2019
- Tenure: Standard
- Select Holder: The dropdown menu is open, showing a profile icon, "Monks, Latel" (highlighted with a blue arrow), and a search input field. Below the input field is the text "Please enter text to search for Members or use Search button" and "Search", "Clear", and "New" buttons.

The green "Save" button at the bottom left is now highlighted with a blue arrow.

6 HOW TO REMOVE A MEMBER'S POSITION

Go to the WI's list of positions, by opening the WIs main page, and selecting 'Positions' in the Sections box on the right

WI Positions - Dummy WI

Positions Held at this WI

All records per page Search:

Position	Status	Tenure	Effective From Date	Person	Person Type
MCS Rep	Active	Standard	18/09/2019	Bloggs, Joanne	Members
Secretary	Active	Standard	18/09/2019	Monks, Latel	Members

Showing 1 to 2 of 2 entries Previous 1 Next

[Add Position to WI](#) [Show Active](#) [Show Inactive](#) [Show All](#)

Here you can remove a member's position in one of two ways:

Option 1:

To just remove a member's position, click on the arrow/triangle next to the position you want to remove

WI Positions - Dummy WI

Positions Held at this WI

All records per page Search:

Position	Status	Tenure	Effective From Date	Person	Person Type
MCS Rep	Active	Standard	18/09/2019	Bloggs, Joanne	Members
Secretary	Active	Standard	18/09/2019	Monks, Latel	Members

Showing 1 to 2 of 2 entries Previous 1 Next

[Add Position to WI](#) [Show Active](#) [Show Inactive](#) [Show All](#)

This will open another screen.

Here you can click on the red, Revoke button

Position held at WI

Position: MCS Rep

Effective From Date: 18/09/2019

Tenure: Standard

Group: [Please select...]

Current Holder: Bloggs, Joanne

Select New Holder: No item selected

Please enter text to search for Members or use Search button

Search Clear New

Save Revoke

Option 2:

To assign a position to another member, click on the arrow/triangle next to the position you want to change.

When the new screen opens up, type the new position holder in the 'Select New Holder' box

Position held at WI

Position: MCS Rep

Effective From Date: 18/09/2019

Tenure: Standard

Group: [Please select...]

Current Holder: Bloggs, Joanne

Select New Holder: No item selected

Late| Monks

Late| Monks

Search Clear New

Save Revoke

Click on the name when it appears, which will enter it into the New Holder section. Then just click on 'Save'

Position held at WI

Position: MCS Rep

Effective From Date: 18/09/2019

Tenure: Standard

Group: [Please select...]

Current Holder: Bloggs, Joanne ()

Select New Holder: Monks, Late|

Please enter text to search for Members or use Search button

Search Clear New

Save Revoke

This will then update the Positions list

WI Positions - Dummy WI

Positions Held at this WI

All records per page Search:

	Position	Status	Tenure	Effective From Date	Person	Person Type
▶	Secretary	Active	Standard	18/09/2019	Monks, Latel	Members
▶	MCS Rep	Active	Standard	18/09/2019	Monks, Latel	Members

Showing 1 to 2 of 2 entries

Previous 1 Next

[Add Position to WI](#) [Show Active](#) [Show Inactive](#) [Show All](#)

7 HOW TO CHANGE A MEMBER'S WI (for federations only)

Search for your member, and open her record



Member Details - 000000016

A screenshot of a web application showing the 'Member Details' page for member ID 000000016. The page has a light grey background. At the top left, there is a green 'Save' button. The main content area is divided into two sections: 'Status Info' and 'Contact Details'. The 'Status Info' section contains three fields: 'Reference' (000000016), 'Status' (Active), and 'Status Date' (17/07/2014 10:54). The 'Contact Details' section contains six fields: 'Title' (Mrs), 'First Name' (Latel), 'Surname' (Monks), 'Salutation', and 'Post Code' (SL0 0RN). On the right side, there are two vertical panels: 'Sections' and 'Tools'. The 'Sections' panel lists: Basic Details, Skills, Newsletters, Interests, Positions, Training Courses, Competitions, and Campaigns. The 'Tools' panel lists: Search for Members, Create New Member, Search simple Member reports, Create simple Member report, View audit records, View Relationships, and Status History.

Scroll down to where you see Membership details and click on the dropdown menu next to WI

A screenshot of the 'Contact Details' section of the member record. It shows a 'Fax' field and a 'Preferred Contact Method' dropdown menu with the text '[Please select...]'.A screenshot of the 'Membership Details' section of the member record. It contains several fields: 'Federation' (Buckinghamshire), 'WI' (George Green), 'Member Type' (Full), 'Primary Membership?' (Yes), 'Date Joined' (17/07/2014), 'Expiry Date', 'Reminder History', and 'Notes'. A blue arrow points to the 'WI' dropdown menu, which is currently set to 'George Green'.A screenshot of the 'Personal Details' section of the member record. It contains two fields: 'Is Delegate?' and 'Media Friendly?', both with radio buttons for 'Yes' and 'No'.

This will give you a list of WIs within that federation

The screenshot shows a web form for membership details. On the left is a sidebar with sections: 'Preferred Contact Method', 'Membership Details', 'Federation', 'WI', 'Member Type', 'Primary Membership?', 'Date Joined', 'Expiry Date', and 'Reminder History'. The 'Federation' section is expanded, showing a scrollable list of workplaces. 'George Green' is highlighted in blue. Other workplaces include Downley Village Afternoon, Downley Village Evening, Drayton Parslow, Dunsmore, Edlesborough, Emberton, Fairford Leys, Farnham Common, Flackwell Heath Evening, Flackwell Heath Morning, Forty Green, Frieth, Fulmer, Furzton, Gawcott, Granborough, Great Brickhill, Great Hampden, Great Horwood & Singleborough, Great Kingshill Afternoon, Great Kingshill Evening, Great Linford, Great Missenden, Great Missenden Evening, Grendon Underwood Edgcott & King, Haddenham, Haddenham & Witchert, Hambleton, and Hanslope.

Click on the new WI (you may need to scroll up or down)

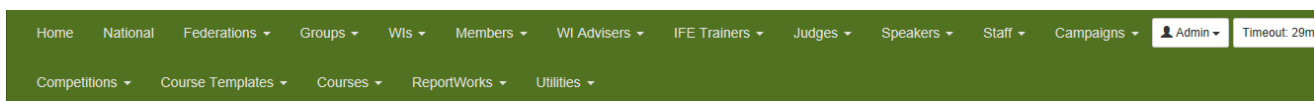
And then scroll to the bottom of the page and click on Save



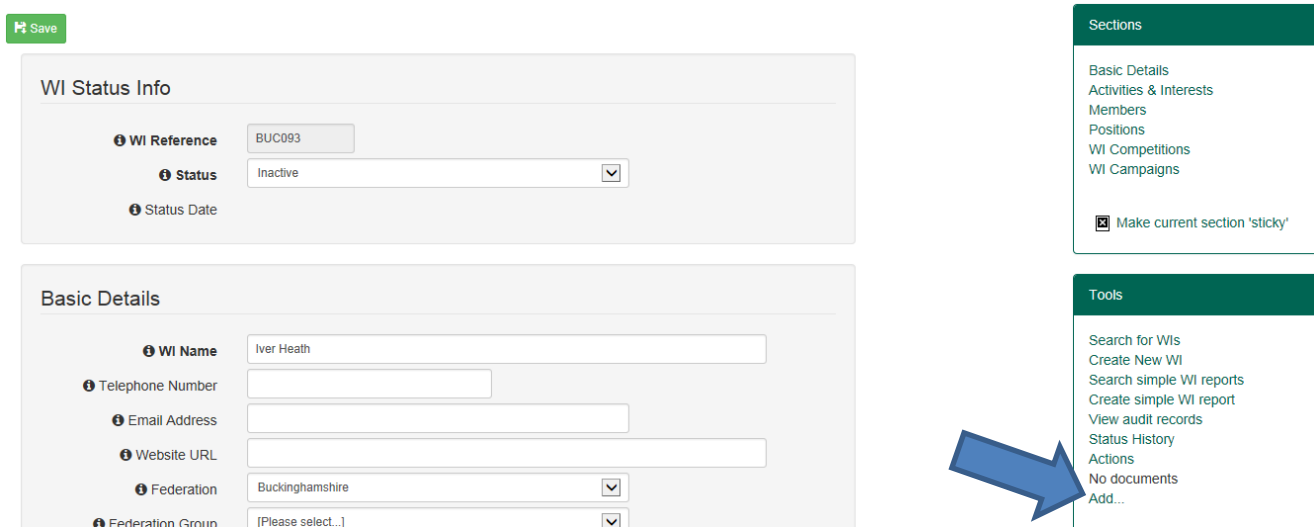
8 HOW TO UPLOAD A DOCUMENT OR WEB LINK

You can upload documents or website links to any records on the MCS. Each record is done in the same way, whether it be an individual member's record, a WI's record or a federation record. I will use a WI's record as an example.

Open the WI's record and click on Add... in the Tools box

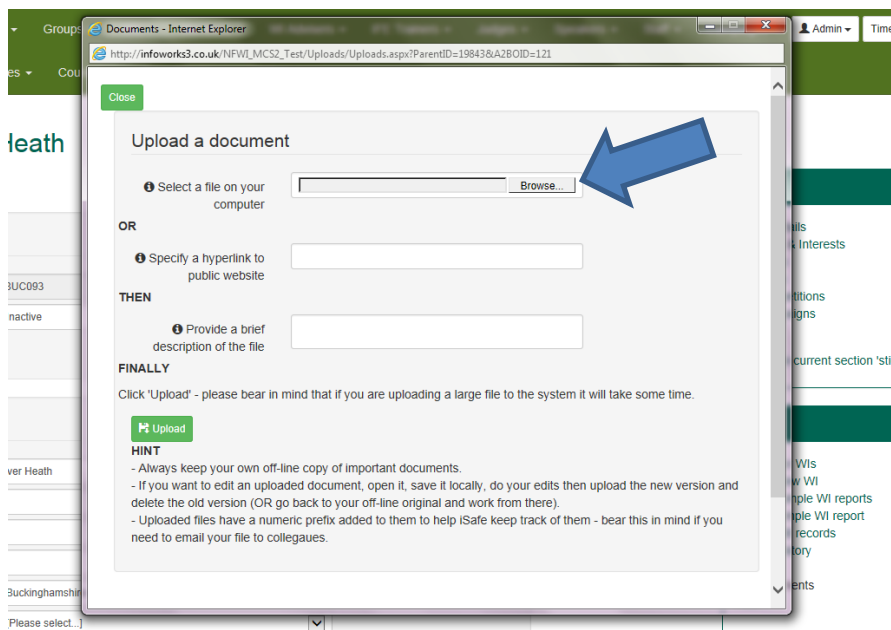


WI's Details - Iver Heath



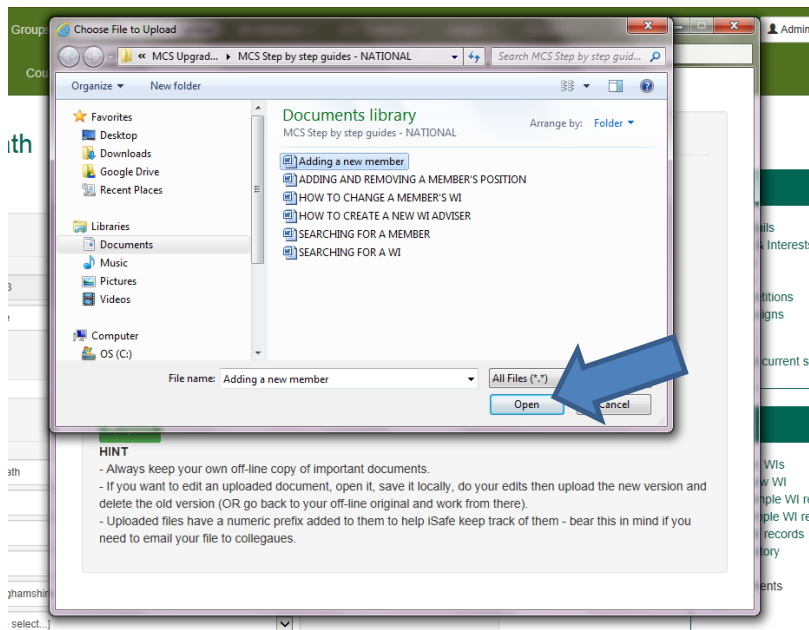
Another window will open up

If you want to upload a document, click on Browse



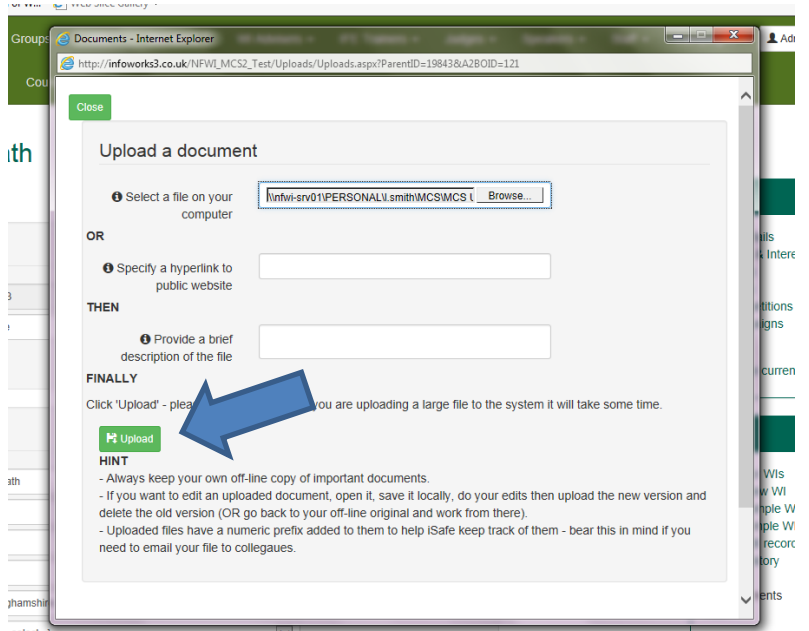
This will open your file directory on the PC you are using

Select the document you want to upload and click on Open

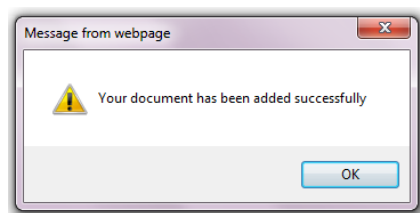


The file path for this document will then show in the document box

Click on Upload

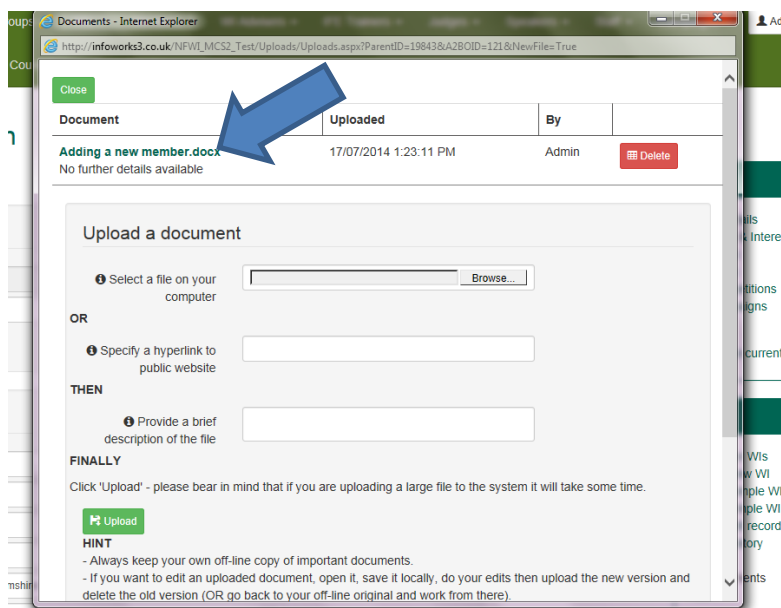


You will then see a box pop up telling you it has been successfully uploaded. Click on OK.

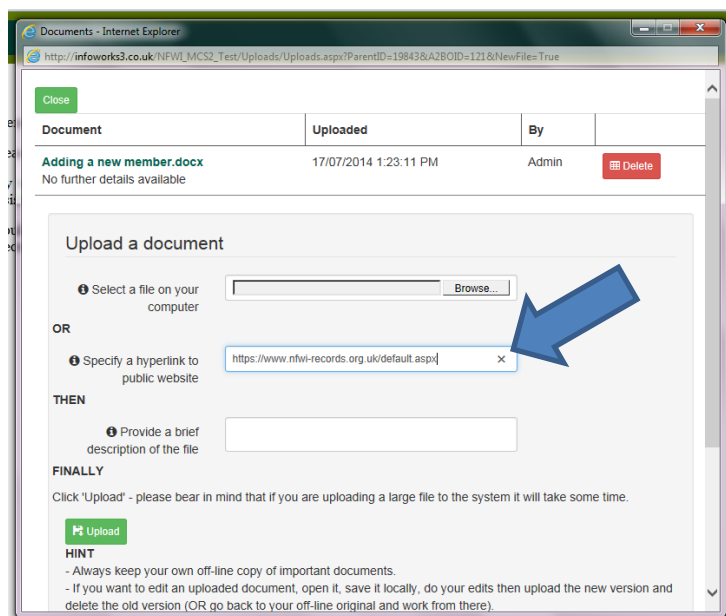


Updated: July 2023

You will now see the upload box open up again but this time, with your document listed at the top.



If you want to upload another document, you can do it again from here or if you want to upload a hyperlink to a web page, just copy the link <https://www.nfwl-records.org.uk/default.aspx> and paste it in the hyperlink box and click on Upload



As before, it will be confirmed and then show up with your document in the upload box

Close

Document	Uploaded	By	
Adding a new member.docx No further details available	17/07/2014 1:23:11 PM	Admin	Delete
https://www.nfwl-records.org.uk/default.aspx No further details available	17/07/2014 1:29:31 PM	Admin	Delete

Upload a document

Select a file on your computer Browse...

OR

Specify a hyperlink to public website

THEN

Provide a brief description of the file

FINALLY

Click 'Upload' - please bear in mind that if you are uploading a large file to the system it will take some time.

Upload

Next time you want to upload a document or hyperlink, you will notice that the Add... has disappeared and in its place is the number of documents and View... underneath it

WI's Details - Iver Heath

Save

WI Status Info

WI Reference: BUC093

Status: Inactive

Status Date:

Basic Details

WI Name: Iver Heath

Telephone Number:

Email Address:

Website URL:

Federation: Buckinghamshire

Federation Group: [Please select...]

Registered Office?: Yes No

Sections

- Basic Details
- Activities & Interests
- Members
- Positions
- WI Competitions
- WI Campaigns

Make current section 'sticky'

Tools

- Search for WIs
- Create New WI
- Search simple WI reports
- Create simple WI report
- View audit records
- Status History
- Actions
- 2 document(s)
- View...

This Record

To upload a document or hyperlink now, just click on View... and follow the previous instructions

9 SEARCHING FOR A POSITION

Below is an example of how to search for all WI Secretaries

Click on 'Members' in the green strip, then select 'Search All'

The screenshot shows the top navigation bar with a green background. The 'Members' menu item is highlighted, and a blue arrow points to it. Below the navigation bar, there is a 'Tools' dropdown menu with 'Search All' selected, also indicated by a blue arrow. To the left, there is a circular sunburst chart showing membership data by county, with a legend listing counties like Hertfordshire, South Yorkshire, Herefordshire, Isle of Ely, Pembrokeshire, North Yorkshire W..., Berkshire, Powys - Radnor, West Yorkshire, and Glamorgan. To the right, there is a table titled 'Total WIs' with columns for county and total count.

County	Total WIs
Isle of Ely	54
Pembrokeshire	85
North Yorkshire West	141
Berkshire	120
Powys - Radnor	36
West Yorkshire	123
Glamorgan	156
Guernsey	19
Lancashire	213

In the WI Position dropdown box, select Secretary

Search for Members

Please specify your search criteria below, then click 'Search'

Search Criteria

Search For: All visible to me

WI Position: [Please select...]

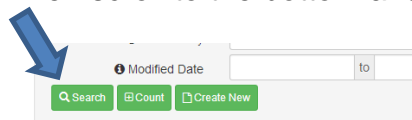
WI Position dropdown list:

- President (temporary)
- Press Officer
- Programme Secretary
- Raffle organiser
- Refreshment organiser
- Register taker
- Resolutions Adviser
- Rota Organiser
- Secretary**
- Secretary (temporary)
- sick visitor
- SWIN Delivery
- Trading Stall organiser
- Treasurer
- Treasurer (temporary)
- Vice President
- Welcoming Steward
- WI Adviser Assistant
- WI Contact
- WI Web Editor

Modified Date: [] to []

Buttons: Search, Count, Create New

Then scroll to the bottom and click on Search



Updated: July 2023

This will give you a list of all WI Secretaries

Members Search Results

helen@mov

10 records per page

Relationship	Reference	Status	First Name	Surname	Federation	WI
Ansell, Sarah 00393096	00393096	Active	Sarah	Ansell	Berkshire	She
Bamford, Dorothy 00404514	00404514	Active	Dorothy	Bamford	Berkshire	Hur
Beale, Myrtle 00001196	00001196	Active	Myrtle	Beale	Berkshire	Pac
Bird, Charmian 00189614	00189614	Active	Charmian	Bird	Berkshire	We
Boughtwood, Susan 00472184	00472184	Active	Susan	Boughtwood	Berkshire	Tile
Bradley, Christine 00368881	00368881	Active	Christine	Bradley	Berkshire	Cro
Bravery, Lesley 00383252	00383252	Active	Lesley	Bravery	Berkshire	The
Breheny, Isobel 00396898	00396898	Active	Isobel	Breheny	Berkshire	Rac
Brohier, Karen	00465096	Active	Karen	Brohier	Berkshire	Bas

You can change the number of records per page by changing the number in the dropdown menu at the top.

10 HOW TO CONVERT LIST TO EXCEL FILES

You can convert any list into an Excel document. You can then use this to produce mail merge documents etc

At the top of any list are 3 options:

WI's Members - Dummy WI

WI's Members

Copy CSV Print

All records per page Search:

Member	Title	First Name	Surname	Membership Type	Membership Status	Telephone (Day)	Email
BUC/195/00641933		Joanne	Bloggs	Full	Active		testingemail@hotmail.com
BUC/195/00641934		Latel	Monks	Dual	Active		l.monksTEST@nfwi.org.uk

Showing 1 to 2 of 2 entries

Create New Member Show Active Show Inactive Show All

Sections

- Basic Details
- Members
- Positions
- WI Competitions
- WI Campaigns

Tools

- Search for WIs
- Create New WI
- Search simple WI reports
- Create simple WI report
- View audit records
- Status History
- Actions
- No documents
- Add...

If you select CSV (a type of Excel spreadsheet), it will put your list into an Excel document. It will ask you to save your document before you see the result.

Save As

Desktop

Organize New folder

File name:

Save as type: Microsoft Excel Comma Separated Values File

Save Cancel

You can then open your document and the information you had on your MCS will be in an Excel document

11 HOW TO REMOVE A MEMBER

Open the member's record, and select 'Inactive' from the 'Status' dropdown menu

Member Details - Monks, Latel

helen@

Save

Status Info

Reference: 0000000044

Status: **Active** (dropdown menu open with 'Inactive' selected)

Status Date:

Contact Details

Title: Miss

First Name: Latel

Surname: Monks

Salutation:

Post Code: SL0 0RN

Address 1: 299 Longstone Road

Address 2:



This will then open the Status page

Status

Current status is Active

Change View History

New Status: Inactive

Reason for change: [Please select..]

Further Details:

Selecting a new status will display the list of fields which must be completed to make this change

Update Status

All the fields required for this change of status have been completed - to proceed, click 'Change'

Please Note - you must provide an explanation for this change of status

Confirm Change

OK?	Item	Value	Explanation
✓	Officer Position Re-assignment	N/A	

Here you can select the reason for the member being removed from the 'Reason for Change' dropdown menu

Then click on 'Confirm Change'

Status

Current status is **Active**

[Change](#) [View History](#)

New Status Inactive

Reason for change Moved away

Further Details

Selecting a new status will display the following details:

Update Status

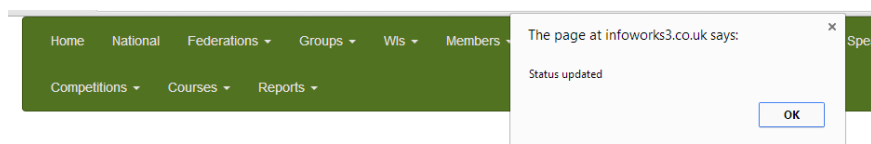
All the fields required for this change of status have been completed - to proceed, click 'Change'

Please Note - you must provide an explanation for this change of status

[Confirm Change](#)

OK?	Item	Value	Explanation
✔	Officer Position Re-assignment	N/A	

You will then see a box appear, confirming the change, and the new status in the Status History



Status

Current status is **Inactive**

[Change](#) [View History](#)

Status History

Ref.	Status	Type	Set By	When	Reason	Notes
	Inactive		helen@mowatnewbury.com	Friday, August 01, 2014	Moved away	
	Active		helen@mowatnewbury.com	Friday, August 01, 2014	Record created	

Update Status

The following fields were required to attain the current status...

However, if you try and remove a member who has an Officers position, you will get the following error

New Status: Inactive

Reason for change: [Please select...]

Further Details

Selecting a new status will display the list of fields which must be completed to make this change

Update Status

All the fields listed below must have values before the status may be changed as specified

OK?	Item	Value	Explanation
X	Officer Position Re-assignment		<p>This member cannot be made inactive, as they hold an Officer Position (President, Secretary, or Treasurer) at this WI. If you still want to make this member inactive, you can proceed in one of two ways:</p> <ol style="list-style-type: none">1. Assign the Officer Position to another member. You can then make this member inactive (as long as they don't hold any other Officer Positions – if so, they must be assigned to another member as well).2. Appoint a Temporary Officer (e.g. Temporary President), if no-one has yet agreed to take on the role permanently. You can then revoke the Officer Position for this member and make this member inactive (as long as they don't hold any other Officer Positions, as above). <p>Once a permanent Officer has been decided, you can allocate the Officer Position and revoke the Temporary Officer Position</p>

So you will need to assign the position to another member before deleting this one.

PLEASE NOTE: When a member is removed from the MCS, it will cancel her login.

12 HOW TO ADD A NEW USER (Federations only)

To add a new MCS Rep, you need to make sure they have their email address listed within their main record. Then you need to assign them the MCS Rep position (see Adding & Removing a Member's Position)

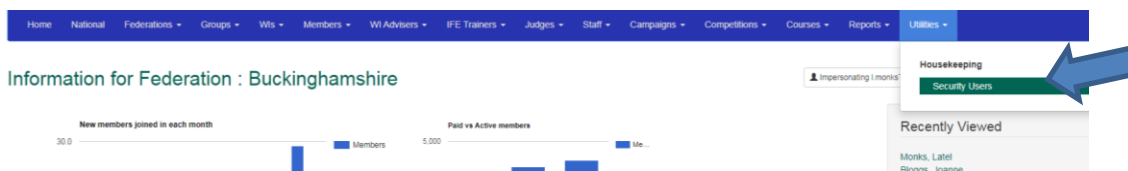
An email will then automatically be sent to the member informing them how to log into the MCS. They will then be able to use the same login details as they use for the My WI site, to log into the MCS.

PLEASE NOTE: If a member's email address is changed within her record, this will also change her login email address. The password will remain the same.

13 HOW TO CHANGE A MEMBER'S PASSWORD (Federations only)

Due to data protection laws, you are not able to view a member's password, but you can change it.

To do this, click on the 'Utilities' menu at the top of the screen and select 'Security Users'



Enter the email address of the person whose email you want to change, in the 'Securityuser' box, and click on Search at the bottom

Search for Security User

Please specify your search criteria below, then click 'Search'

Search Criteria

Securityuser

First name

Surname

Lastlogon to

Lastfailedlogin to

Status

Security Profile

Profile for Search All National Federation/WI

Federation

WI

Created by

Created date to

Modified by

Modified date to

This will bring up the person with that email address. Click on the email address/Securityuser to open the record

Security User Search Results

Impersonating l.monksTEST@nfwi.org.uk Timeout: 29m 26s (Reset)

10 records per page Search:

SecurityUser	FirstName	Surname	Lastlogon	Loginattempts	Lastfailedlogin	Status
l.monksTEST@nfwi.org.uk	Latel	Monks	18/09/2019			Approved

Showing 1 to 1 of 1 entries

Then click on 'Change Password'

Security User Details - l.monksTEST@nfwi.org.uk

Impersonating l.monksTEST@nfwi.org.uk

Save

Status

Status Approved

Application MCS2

Notes

Basic Details

Person Monks, Latel

Username l.monksTEST@nfwi.org.uk

Login As > Change Password

Login Info

Last Logon 18/09/2019

Login Attempts

Last Failed Login

Then enter the new password in the 'Password' box and repeat it below. (It will show as dots)
Please note: Passwords must meet the required criteria which is, as least 8 characters including at least 1 number.

Then click on 'Save' at the bottom

Status

🔑 Status

Approved

🔑 Application

MCS2

🔑 Notes

Basic Details

🔑 Person



Monks, Latel

🔍 Search

✖ Clear

🔑 Username

l.monksTEST@nfwi.org.uk

🔑 Login As

> Change Password

🔑 Password

🔑 Password

Confirm Change

14 HOW TO REMOVE A DUAL MEMBER FROM A WI

Search for the member

She will show up twice in the Member Search Results, once for the Primary/Full WI and once for the Secondary/Dual WI

Members Search Results

I.monkstest@nfwi.org.uk Logoff Timeout: 29m 56s (Reset) Help

Copy CSV Print Select All Select None

10 records per page

Search:

Relationship	Reference	Type	Status	First Name	Surname	Federation	WI	Post Code
Monks, Latel BUC19500641934	00641934	Dual	Active	Latel	Monks	Buckinghamshire	Dummy WI	SLO 0RN
Monks, Latel BUC21000641932	00641932	Full	Active	Latel	Monks	Buckinghamshire	Amersham Angels	SLO 0RN

Showing 1 to 2 of 2 entries

Previous 1 Next

Search Again Create New

Choose the record with the WI you want to remove her from

This will open up her record for that WI


Change her status to 'Inactive'

Member Details - Monks, Latel

Save

Status Info

Reference: 0000000044

Status: 

Status Date:

Contact Details

Title:

First Name:

Surname:

Salutation:

Post Code:

Updated: July 2023

This will then open the Status page

Status

Current status is Active

[Change](#) [View History](#)

New Status Inactive

Reason for change [Please select..]

Further Details

Selecting a new status will display the list of fields which must be completed to make this change

Update Status

All the fields required for this change of status have been completed - to proceed, click 'Change'
Please Note - you must provide an explanation for this change of status

[Confirm Change](#)

OK?	Item	Value	Explanation
✓	Officer Position Re-assignment	N/A	

Here you can select the reason for the member being removed from the 'Reason for Change' dropdown menu

Then click on 'Confirm Change'

Status

Current status is **Active**

[Change](#) [View History](#)

New Status

Reason for change

Further Details

Selecting a new status will display the following information:

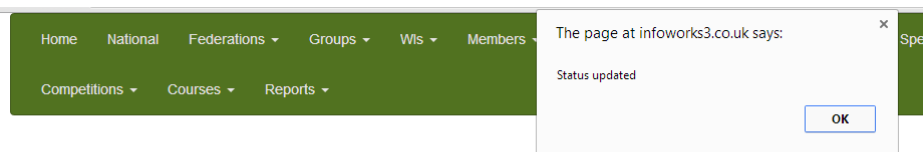
OK?	Item	Value	Explanation
✓	Officer Position Re-assignment	N/A	

Update Status

All the fields required for this change of status have been completed - to proceed, click 'Change'
Please Note - you must provide an explanation for this change of status

[Confirm Change](#)

You will then see a box appear, confirming the change, and the new status in the Status History



Status

Current status is **Inactive**

[Change](#) [View History](#)

Status History

Ref.	Status	Type	Set By	When	Reason	Notes
	Inactive		helen@mauntonburn.com	Friday, August 01, 2014	Moved away	
	Active		helen@mauntonburn.com	Friday, August 01, 2014		Record created

Update Status

The following fields were required to attain the current status...



PLEASE NOTE: If a member is removed from a FULL WI then an email will be sent automatically to the Federation Secretary.

15 HOW TO PRODUCE REPORTS

To produce your own member reports from the MCS, click on Members and choose 'Create simple member report'

The screenshot shows the MCS Members page. At the top is a navigation bar with 'Members' selected. Below it is a pie chart showing the distribution of members across various regions. A 'Tools' dropdown menu is open, with 'Create simple member report' highlighted by a blue arrow. To the right, a table shows 'Total WIs' for different regions.

Region	Total WIs
South Yorkshire	99
Hertfordshire	160
North Yorkshire W...	141
Herefordshire	125
Kent - West Kent	247
West Yorkshire	123
Isle of Ely	54
Pembrokeshire	85
Glamorgan	156
Berkshire	120

This will open up the Report Criteria page.

Here you can select what you want to search on. For this example I am just searching for all Primary members within my federation.

The first thing you must do is name the report in the box at the top.

The screenshot shows the 'Members Report - Latel member test' page. The 'Report Name' field is filled with 'Latel primary member test'. Below it is a form for defining report criteria with fields for Firstname, Surname, Federation, WI, Address1, Address2, Address3, Town, County, Postcode, and Telephone. A blue arrow points to the 'Report Name' field.

Then scroll down until you see the 'PrimaryMembership' box, and put 'yes' in the box.

DateJoined	<input type="text"/>
Status	<input type="text"/>
StatusDate	<input type="text"/>
TotalPositions	<input type="text"/>
PrimaryMembership	<input checked="" type="checkbox"/>
IsDelegate	<input type="text"/>
MediaFriendly	<input type="text"/>
Profession	<input type="text"/>
ProfessionOther	<input type="text"/>
Skills	<input type="text"/>
SkillOther	<input type="text"/>
PositionsHeld	<input type="text"/>
PreferredContactMethod	<input type="text"/>
Ethnicity	<input type="text"/>
CommitmentsEntered	<input type="text"/>



It would be the same for whatever fields you choose to enter criteria for ie If you wanted to show all WI Secretaries you would put 'Secretary' in the 'PositionsHeld' box, or an interest in the 'Interests' box

When you have selected all of the criteria you want (you can choose as many as you want), click on 'continue' at the top or bottom of the page

This will then take you to the next screen, where you select what information you want to show in your report. For this example I want to show the member's name, WI, federation and the date they joined

To do this, you just put a tick in the boxes you want to select

Report Name

Field Name	Output Field?
Firstname	<input checked="" type="checkbox"/>
Surname	<input checked="" type="checkbox"/>
Federation	<input checked="" type="checkbox"/>
WI	<input checked="" type="checkbox"/>
Address1	<input type="checkbox"/>
Address2	<input type="checkbox"/>
Address3	<input type="checkbox"/>
Town	<input type="checkbox"/>
County	<input type="checkbox"/>
Postcode	<input type="checkbox"/>
TelephoneDay	<input type="checkbox"/>
TelephoneEvening	<input type="checkbox"/>
TelephoneMobile	<input type="checkbox"/>
Email	<input type="checkbox"/>
Email2	<input type="checkbox"/>
DateJoined	<input checked="" type="checkbox"/>
Status	<input type="checkbox"/>
StatusDate	<input type="checkbox"/>

Then, again, click on 'Continue' at either the top or bottom of the page

Updated: July 2023

You will then be taken to the next page which will give you the option to select the preferred order of your report.

In the 'Column Order' below, I have selected the order I want my report to appear. I want the list to come out with the First Name in the first column, the Surname in the second column, the WI in the third column, the federation in the fourth column and the Date Joined in the end column

Back Continue Run

Report Name: Latel primary member test

Field Name	Column Order	Sort Order	Sort Direction
Firstname	1	4	Asc
Surname	2	3	Asc
Federation	4	1	Asc
WI	3	2	Asc
DateJoined	5	5	Asc

I have also selected the order I want the columns to be sorted by, in the 'Sort Order'. This will sort, in alphabetical order, and by my choices above will sort first the federation, then the WI, then the Surname, then the First Name and finally the Date Joined.

You do not have to sort all of these columns if you don't want to, you can leave some or all of them blank. For Example, if you only wanted to sort by surname, in the Sort Order, you can just put a '1' next to the Surname. That will sort your final list by surname only.

When you have selected your orders, you can click on 'Run' at the top or bottom of the page

Back Continue Run

This will then produce your report:

helen@... .com Timeout: 29m 54s (Reset) Help

Back to Query

Report found 5616 matching record(s)

10 records per page

Copy CSV Excel Print

Search:

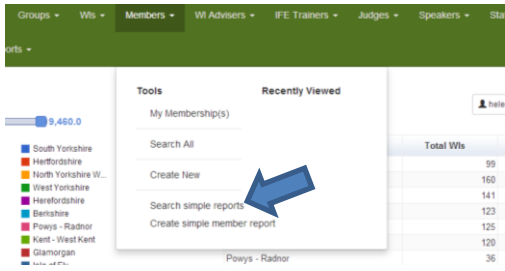
Firstname	Surname	WI	Federation	DateJoined
Daphne	Bennett	Arborfield & Newland	Berkshire	
Nicky	Brown	Arborfield & Newland	Berkshire	14/01/2014 12:00:00 AM
Sheila	Bunce	Arborfield & Newland	Berkshire	
Sheila	Bunce	Arborfield & Newland	Berkshire	01/04/2012 12:00:00 AM
Murial	Butler	Arborfield & Newland	Berkshire	
Margaret	Cartwright	Arborfield & Newland	Berkshire	09/10/2012 12:00:00 AM
Alma	Chandler	Arborfield & Newland	Berkshire	
Hida	Clarke	Arborfield & Newland	Berkshire	
Peggy	Cotgrove	Arborfield & Newland	Berkshire	
Doreen Hilda Mary	Devine	Arborfield & Newland	Berkshire	

Showing 1 to 10 of 5,616 entries

Previous 1 2 3 4 5 ... 562 Next

Here you can change the order of the columns by clicking on the column heading, search for names etc in the report by typing in the search box, or copy, print or save the report to an Excel document.

Now, if you click on 'Search simple reports' it will show all of the reports you have produced



And you can select them to run again, instead of writing them up each time

Home National Federations Groups Wis Members WI Advisers IFE Trainers Judges Speakers Staff Campaigns

Competitions Courses Reports

Report Search Results

helen@r.com Timeout: 29m 58s (Reset) Help

Copy CSV Excel Print

10 records per page Search:

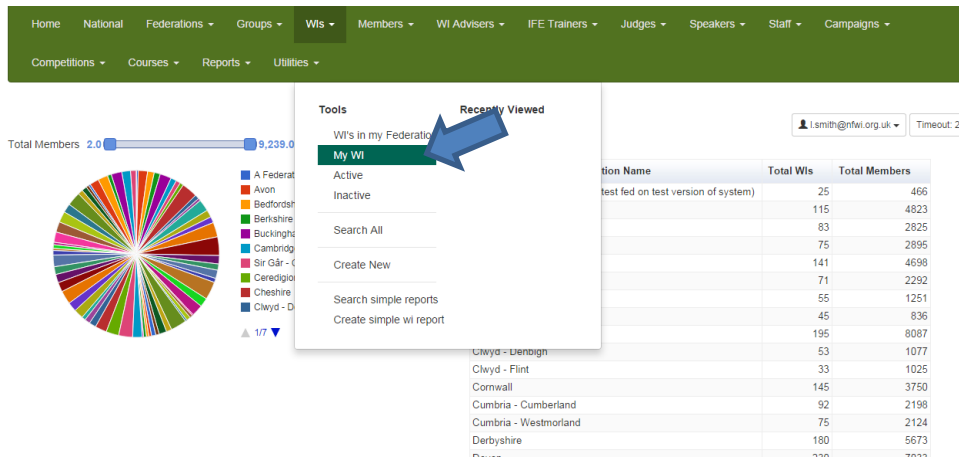
Report Name	Report On	
Latel - WI Secretaries	Members	run
Latel primary members test	Members	run

Showing 1 to 2 of 2 entries Previous 1 Next

Search Again Create New Member Report Create New WI Report

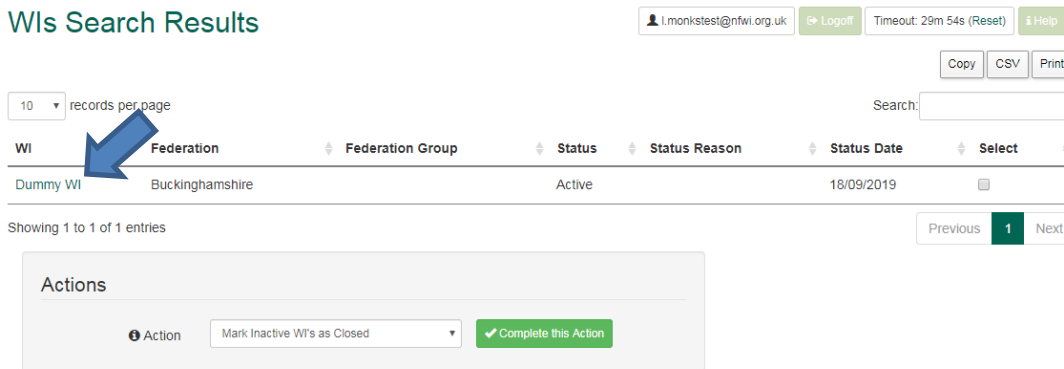
16 HOW TO FIND YOUR LIST OF MEMBERS

Select WIs from the top green menu
And select My WI



Another screen will open up with your WI showing in the Search Results
Click on the name of your WI

WIs Search Results



This will open up your WIs main details page
In the Sections box on the right, click on 'Members'

WI's Details - Dummy WI

WI Status Info

WI Reference: 195

Status: Active

Status Date: 18/09/2019 09:48

Basic Details

WI Name: Dummy WI

Telephone Number: [Empty]

Email Address: [Empty]

Website URL: [Empty]

Federation: Buckinghamshire

Federation Group: [Please select...]

Registered Office?: Yes No

Sections

- Basic Details
- Members
- Positions
- WI Competitions
- WI Campaigns

Tools

- Search for WIs
- Create New WI
- Search simple WI reports
- Create simple WI report
- View audit records
- Status History
- Actions
- No documents
- Add...

This Record

Created by: l.monks@nfwi.org.uk
Created on: 18/09/2019 09:48
Modified by: l.monks@nfwi.org.uk
Modified on: 18/09/2019 09:49

This will bring up a list of your members

You can print it by clicking on Print at the top, which will print off the information that you see on the screen.

WI's Members - Dummy WI

WI's Members

Copy CSV Print

All records per page

Search: [Empty]

Member	Title	First Name	Surname	Membership Type	Membership Status	Telephone (Day)	Email
BUC/195/00641933		Joanne	Bloggs	Full	Active		testingemail@hotmail.com
BUC/195/00641934		Latel	Monks	Full	Active		l.monksTEST@nfwi.org.uk

Showing 1 to 2 of 2 entries

Previous 1 Next

Create New Member Show Active Show Inactive Show All

Sections

- Basic Details
- Members
- Positions
- WI Competitions
- WI Campaigns

Tools

- Search for WIs
- Create New WI
- Search simple WI reports
- Create simple WI report
- View audit records
- Status History
- Actions
- No documents
- Add...

Next time you want to access your WI and the members you will see your WI listed in your recently viewed items when you click on WIs again. Just click on the name of your WI and it will take you to the WIs main details page again

Home National Federations Groups **Wis** Members Campaigns Competitions Courses Reports

WI's Members - Dummy WI

Tools

- WI's in my Federation
- My WI
- Active
- Inactive
- Suspended
- New Last Month
- New This Year
- Search All
- Create New
- Search simple reports
- Create simple wi report

Recently Viewed

- Dummy WI
- Amersham Angels

Sections

- Basic Details
- Members
- Positions
- WI Competitions
- WI Campaigns

Tools

- Search for Wis
- Create New WI
- Search simple WI reports
- Create simple WI report
- View audit records
- Status History
- Actions
- No documents

WI's Members

All records per page

Member	Title	First Name	Surname	Men
BUC/195/00641933		Joanne	Bloggs	Full
BUC/195/00641934		Latel	Monks	Full

Showing 1 to 2 of 2 entries

Create New Member Show Active Show Inactive Show All

If you wanted to print out a list of your member's details including their addresses, there is a report for this. If you click on 'Reports' in the green menu strip, and select 'Standard'

Home National Federations Groups Wis Members WI Advisers IFE Trainers Judges Speakers Staff Campaigns

Competitions Courses Reports Utilities

WI's Details - Test

Tools

- Standard

Sections

- Basic Details
- Activities & Interests
- Members
- Positions
- WI Competitions
- WI Campaigns
- Make current section 'sticky'

Tools

- Search for Wis
- Create New WI
- Search simple WI reports
- Create simple WI report
- View audit records
- Status History

WI Status Info

WI Reference: 224

Status: Active

Status Date: 17/09/2014 12:13

Basic Details

WI Name: Test Latel Test

Telephone Number:

Email Address:

This will give you a dropdown menu of Report to run.

Click on the arrow to bring up the list and select 'ALL members download (for MCS Rep use only)'

Standard reports

I.monkstest@

To view a report, select an item from the drop-down list below. Next, supply any criteria that might be needed to run the report (e.g. federation, date range), then click 'Generate Report'.

Report to run (Select a report to run)

- (Select a report to run)
- ALL members download (for MCS rep use only)**
- ALL members download by Join Date (for MCS rep use only)
- ALL members download by Position (for MCS rep use only)
- All Speakers Search Fields
- Annual Meeting Day
- Cheshire Members
- Closed members by Federation
- Copy of Institute Age Report
- Copy of Suspended WIs in time period
- Enlarged WIs in time period
- Federation Active Member Count
- Federation Group Secretaries and Chairmen
- Federation Group Treasurers
- Federation Subscription List (PDF)
- Federation Subscription List (Pro Rata Export)
- Federation Yearbook Report
- Full and Dual members per WI in a Federation
- Full member info
- Full member info (Federation)

Delete Generate Report

This will open up a selection box for you to enter the name of your WI. You MUST put this in 'SINGLE QUOTES' ie 'Abbots Leigh' Or if you only belong to one WI you can leave the percentage sign '%' Then click on Run Query

ALL members download (for MCS rep use only)

I.monks

Enter WI (leave as '%' to see ALL WI's you have access to)

Run Query Download Results

This will then produce a list of your members with their personal details.

ALL members download (for MCS rep use only)

I.monkstest@nfwl.org.uk Logout Timeout: 29m 51s (Reset) Help

Export Results

Report found 2 matching record(s)

Copy Print

10 records per page Search:

Firstname	Surname	Federation	WI	Address1	Address2	Address3	Town	County	Postcode	TelephoneDay	TelephoneEvening	TelephoneMobile	Email	Email2	DateJoined	Status	StatusDate	Total
Joanne	Bloggs	Buckinghamshire	Dummy WI	104 New Kings Road			LONDON		SW6 4LY				testingemail@hotmail.com		18/09/2019 00:00:00	Active	18/09/2019 11:24:59	1
Latel	Monks	Buckinghamshire	Dummy WI	299 Longstone Road			IVER	Buckinghamshire	SLO 0RN				I.monksTEST@nfwl.org.uk		18/09/2019 00:00:00	Active	18/09/2019 14:35:42	2

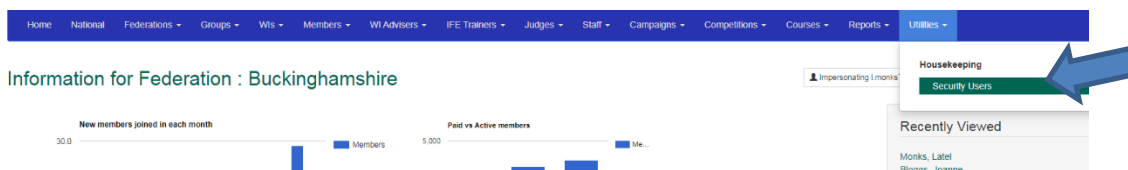
Showing 1 to 2 of 2 entries

Export Results

Previous 1 Next

17 HOW TO CHANGE A MEMBER'S SECURITY SETTINGS (Federations only)

To do this, click on the 'Utilities' menu at the top of the screen and select 'Security Users'



Enter the email address of the person you want to change, in the 'Securityuser' box, and click on Search at the bottom

Search for Security User

Please specify your search criteria below, then click 'Search'

Search Criteria

Securityuser

First name

Surname

Lastlogon to

Lastfailedlogin to

Status

Security Profile

Profile for Search All National Federation/WI

Federation

WI

Created by

Created date to

Modified by

Modified date to

This will bring up the person with that email address. Click on the email address/Securityuser to open the record

Security User Search Results

Impersonating l.monksTEST@nfwl.org.uk Timeout: 29m 26s (Reset)

10 records per page Search:

SecurityUser	FirstName	Surname	Lastlogon	Loginattempts	Lastfailedlogin	Status
l.monksTEST@nfwl.org.uk	Latel	Monks	18/09/2019			Approved

Showing 1 to 1 of 1 entries

Scroll down to 'Roles' and click on the 'Profile' drop down menu, and select Federation: User (read only)

Organisation	Group Name	Role Name	
Mercure	WI	Manager (MCS Rep)	✖

Showing 1 to 1 of 1 entries

Previous 1 Next

Add

Show Top Level Show All

Roles

- Profile [Please select...]
- National [Please select...]
- Federation [Please select...]
- WI [Please select...]

Add Role

Relationships

Then click on 'Federation' and select your Federation

Organisation	Group Name	Role Name	
Mercure	WI	Manager (MCS Rep)	✖

Showing 1 to 1 of 1 entries

Previous 1 Next

Add

Show Top Level Show All

Roles

- Profile [Please select...]
- National [Please select...]
- Federation [Please select...]
- WI [Please select...]

Add Role

Relationships

Then click on Add Role

18 HOW TO REINSTATE A MEMBER

Go to your list of members

WI's Members - Marchington

Logoff | Timeout: 29m 38s (Reset) | Help

WI's Members

Show All entries | Copy | CSV | print | Search: []

Member	Title	First Name	Surname	Membership Type	Membership Status	Telephone (Day)	Email
STA/107/00338044	Mr	Krystal	Birmingham	Full	Active	06226 277296	KrystalBirmingham@Crikkit.org.com
STA/107/00501938	Revd	James	Camel	Full	Active	09375 024091	JamesCamel@Alderaan.nz
STA/107/00493474	Lady	Eldora	Cascone	Full	Active	01516 563537	EldoraCascone@Kaitain.uk.com
STA/107/00018594	Mrs	Sal	Esnard	Full	Active	03033 403980	SalEsnard@Kaitain.uk.com
STA/107/00014466	Ms	Elvis Presley	Furtado	Full	Active	08900 148071	Elvis PresleyFurtado@Tatooine.org
STA/107/0010054	Lady	Dee	Coode	Full	Active	05045 265904	DeeCoode@Alderaan.nz

Sections: Basic Details, Members, Positions, WI Competitions, WI Campaigns

Tools: Search for WIs, Create New WI, Search simple WI reports, Create simple WI report, View audit records, Status History, Actions, No documents

Scroll to the bottom of the list and you will see the 'Show Inactive' button.

Showing 1 to 30 of 30 entries | Previous 1 Next

Create New Member | Show Active | Show Inactive | Show All | Delete

Click on 'Show Inactive', and you will see a list of all past members who are now showing as Inactive. Note: you will see a number of entries saying Former Member. These are past members who have been inactive for 5 years or more, and have their details have been removed to comply with GDPR regulations. The list is in alphabetical order so you may need to scroll to the end of the former members to find the rest of your list

WI's Members

Show entries Search:

Member	Title	First Name	Surname	Membership Type	Membership Status	Telephone (Day)	Email
STA/107/00441462	Miss	Karma	Blazek	Full	Inactive	01021 234961	KarmaBlazek@Boba.co.uk
STA/107/00022761		Former Member	Former Member	Full	Inactive		
STA/107/00034361		Former Member	Former Member	Full	Inactive		
STA/107/00058143		Former Member	Former Member	Full	Inactive		
STA/107/00084230		Former Member	Former Member	Full	Inactive		
STA/107/00122530		Former Member	Former Member	Full	Inactive		

Sections: Basic Details, Members, Positions, WI Competiti, WI Campaign

Tools: Search for W, Create New V, Search simpl, Create simpl, View audit re, Status Histor, Actions, No document, Add...

Click on the member number of the one you wish to reinstate, which will open their record. Then click on the 'Status' box and select 'Active'.

HOME NATIONAL FEDERATIONS GROUPS WIS MEMBERS WI ADVISERS IFE TRAINERS JUDGES

POSITIONS PEOPLE COURSE TEMPLATES COURSES MOODLE COURSES REPORTS REPORTWORKS UTILITIES

Member Details - Blazek, Karma

l.monks@nfwl.org.uk

Save

Status Info

Reference: 00441462

Status: (dropdown menu open with options: Inactive, Active, On-hold, [Please select...])

Status Date:

Status Reason:

You will then need to scroll down slightly and click on 'Confirm Change'

Current status is Inactive

Change View History

New Status:

Reason for change:

Further Details:

Selecting a new status will display the list of fields which must be completed to make this change

Update Status

All the fields required for change of status have been completed - to proceed, click 'Change'

The member will then be showing in your list of Active members. To then go back to the list of Active members, scroll to the bottom of the list of Inactive members and click on the 'Active Members' box.

19 HOW TO MARK A GROUP OF MEMBERS AS PAID

Click on 'Members' in the green menu at the top, and select 'Active – Unpaid'

We have updated our Privacy Notice in line with new rules around the use of personal information. Please [click here](#) to access the new Privacy Notice. If you have any questions you can contact us at dataprotection@ntwi.org.uk. [Remind me later](#)

HOME NATIONAL FEDERATIONS GROUPS WIS MEMBERS COURSES REPORTS

Information for WI : Long Sutton

TOOLS

- My Membership(s)
- Active - Full 20
- Active - Dual 0
- Active - Associate 0
- Active - **Active - Unpaid 18**
- Active - Unpaid 18
- Active - All 20
- WI Delegates 0
- WI Secretaries 1
- WI Treasurers 1
- WI Presidents 1
- Recently Modified 0
- Search All
- Create New
- Search simple reports
- Create simple member report

RECENTLY VIEWED

- Schwertfager, Johnny
- Wolzen, Serena
- Artzer, Cherise
- Soleman, Chris
- Garff, Yon
- Former Member, Former Member
- Former Member, Former Member
- Former Member, Former Member

Logoff Timeout: 29m 13s (Reset) Help

Recently Viewed

- Schwertfager, Johnny
- Wolzen, Serena
- Artzer, Cherise
- Soleman, Chris
- Garff, Yon
- Former Member, Former Member
- Former Member, Former Member
- Former Member, Former Member

At the end of each row is a tick box. Tick the box for each member you want to mark as paid.

We have updated our Privacy Notice in line with new rules around the use of personal information. Please [click here](#) to access the new Privacy Notice. If you have any questions you can contact us at dataprotection@ntwi.org.uk. [Remind me later](#)

HOME NATIONAL FEDERATIONS GROUPS WIS MEMBERS COURSES REPORTS

Members Search Results

Impersonating magshurst@tesco.net Logoff Timeout: 29m 9s (Reset) Help

Show 10 entries Copy CSV Print Search:

Relationship	Reference	Type	Status	First Name	Surname	Federation	WI	Post Code	Select
Artzer, Cherise LIS05800181928	00181928	Full	Active	Cherise	Artzer	Lincolnshire South	Long Sutton	Q41 6MR	<input checked="" type="checkbox"/>
Berclier, Karena LIS05800137407	00137407	Full	Active	Karena	Berclier	Lincolnshire South	Long Sutton	PZ17 1WQ	<input type="checkbox"/>
Burkland, Yi LIS05800510664	00510664	Full	Active	Yi	Burkland	Lincolnshire South	Long Sutton	K18 9KL	<input type="checkbox"/>
Butchee, Marilee LIS05800375354	00375354	Full	Active	Marilee	Butchee	Lincolnshire South	Long Sutton	TU11 9IB	<input type="checkbox"/>
Campion, Dee LIS05800413217	00413217	Full	Active	Dee	Campion	Lincolnshire South	Long Sutton	KJ84 8HT	<input type="checkbox"/>
Capan, Ophelia LIS05800181924	00181924	Full	Active	Ophelia	Capan	Lincolnshire South	Long Sutton	FU19 8HU	<input type="checkbox"/>

Scroll to the bottom and click on 'Complete this Action'

Capan, Ophelia LIS05800181924	00181924	Full	Active	Ophelia	Capan	Lincolnshire South	Long Sutton	FU19 8HU	<input type="checkbox"/>
Dukett, Wendolyn LIS05800533798	00533798	Full	Active	Wendolyn	Dukett	Lincolnshire South	Long Sutton	FT41 4SH	<input type="checkbox"/>
Dupee, Malik LIS05800466051	00466051	Full	Active	Malik	Dupee	Lincolnshire South	Long Sutton	QP47 6PJ	<input type="checkbox"/>
Espadas, Kina LIS05800378335	00378335	Full	Active	Kina	Espadas	Lincolnshire South	Long Sutton	ND87 2LH	<input type="checkbox"/>
Felix, Sol LIS05800383315	00383315	Full	Active	Sol	Felix	Lincolnshire South	Long Sutton	IT89 3EC	<input type="checkbox"/>

Showing 1 to 10 of 18 entries Previous 1 2 Next

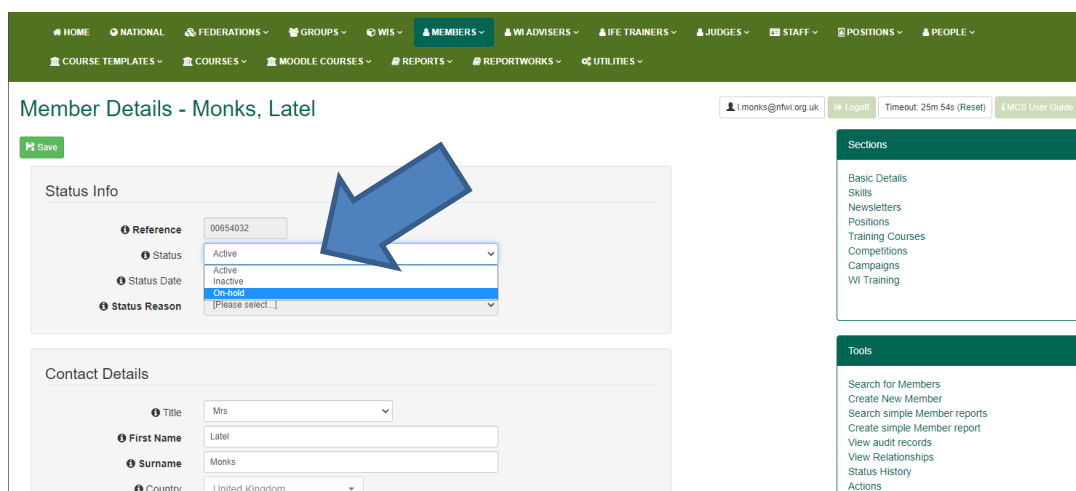
Actions

Action: Mark as Paid Complete this Action

20 HOW TO PUT A MEMBER'S RECORD ON HOLD

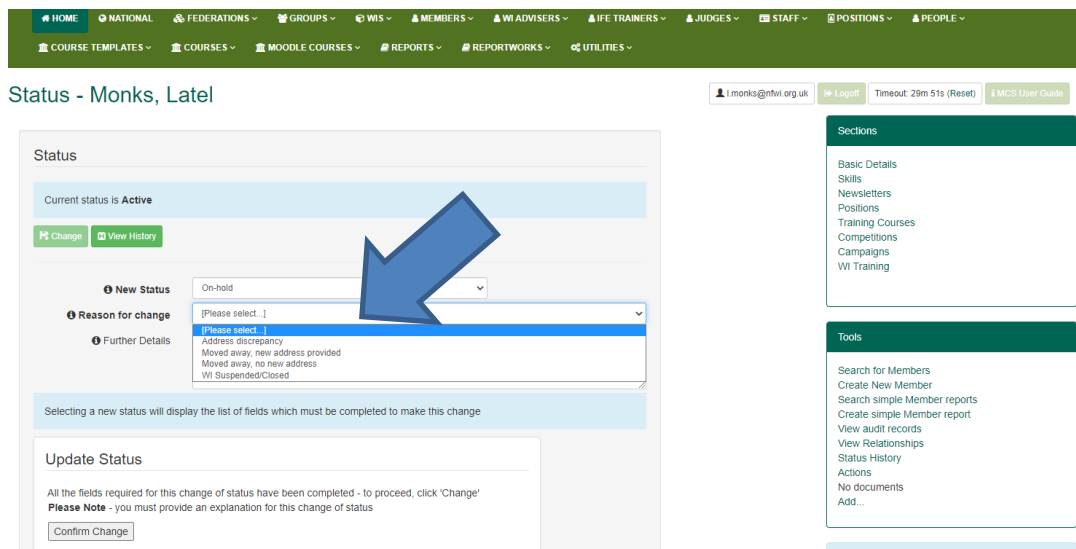
For members who have moved house or their WI has suspended during the subscription year, they can now be placed 'on-hold' on the MCS. This means they will continue receiving their membership benefits (access to My WI and WI Life) for the remainder of the subscription year for which they have paid.

Open the member's record for whom you want to put on hold, then select on-hold from the 'Status' dropdown menu



The screenshot shows the 'Member Details - Monks, Latel' page. The 'Status Info' section has a 'Status' dropdown menu open, with 'On-hold' selected. A blue arrow points to this option. The 'Contact Details' section shows 'Title' as Mrs, 'First Name' as Latel, 'Surname' as Monks, and 'Country' as United Kingdom. The right sidebar contains 'Sections' and 'Tools'.

You will then be taken to a second screen where you will choose a reason from the dropdown menu, and click on 'Confirm Change'



The screenshot shows the 'Status - Monks, Latel' page. The 'Current status is Active' is displayed. The 'New Status' dropdown is set to 'On-hold'. The 'Reason for change' dropdown is open, with 'Moved away, no new address' selected. A blue arrow points to this option. The 'Further Details' section lists reasons: Address discrepancy, Moved away, new address provided, Moved away, no new address, and WI Suspended/Closed. The 'Update Status' section has a 'Confirm Change' button.

The on-hold status will end on 30 April.

21 HOW TO FIX DUPLCATES (Federations only)

If you have an Admin Security profile setting, when you log in you will see a red 'Fix Duplicates' button showing in the top left corner, ONLY if you have duplicates that need fixing.

The screenshot shows the MCS system interface for the Oxfordshire Federation. At the top, there is a navigation menu with options like HOME, NATIONAL, FEDERATIONS, GROUPS, WIS, MEMBERS, WI ADVISERS, LIFE TRAINERS, JUDGES, STAFF, and COURSES. Below the navigation, the page title is 'Information for Federation : Oxfordshire'. A red button labeled 'Fix Duplicates' is visible in the top left corner. To the right, there is a 'Recently Viewed' list containing names like Fairclough, Deb; Botley; Williams, Judith; Woodcote; Shakespeare, Eleanor; Jessup, Patricia; Townsend, Marion; Bailey, Val; Chalgrove; and Singer, Lyn. In the center, there is a bar chart titled 'New members joined in each month' showing the number of members joined each month from August 2021 to August 2022. The chart shows a peak in October 2021 with approximately 90 members.

Month	Members
Aug 2022	0
Jul 2022	0
Jun 2022	0
May 2022	0
Apr 2022	0
Mar 2022	35
Feb 2022	20
Jan 2022	18
Dec 2021	45
Nov 2021	12
Oct 2021	80
Sep 2021	90
Aug 2021	45

Click on the red 'Fix Duplicates' button, and a list of the duplicates will show. If you then click on the green 'Compare' button next to the first set of duplicated records it will show you more information

The screenshot shows the 'Potential Duplicate People' page in the MCS system. The page title is 'Potential Duplicate People'. Below the title, there is a summary: '4 records returned (2 duplicates sets)'. The first set of duplicates is for Surname: Collins, Postcode: RG9 1BL. It shows two records: 'Collins, BRIDGET' and 'Collins, Bridget'. A green 'Compare...' button is next to the first record. The second set of duplicates is for Surname: Wynn-Jones, Postcode: RG9 1QW. It shows two records: 'Wynn-Jones, Gillian' and 'Wynn-jones, Gillian'. A green 'Compare...' button is next to the first record.

Here you will see all information for both entries, including their personal information, whether they are active or inactive, the WI name and if they are full or dual. You can scroll down for more information. This should help you decide which is the main record which should be retained as the active record and which are the one(s) that should be made inactive. They will all be linked into ONE record.

Field	1	2
PersonID	678172	682347
Title	Ms	Ms
Person	BRIDGET Collins	Bridget Collins
Address 1	xxxxxxrd Court	xxxxxxrd Court
Postcode	RG9 9XXX	RG99XX
Email	xxxxxxxxxxx@outlook.com	xxxxxxxxxxx@outlook.com
Person Status	Active	Active
Person Created By	xxxxxxxxxxx@gmail.com	xxxxxxxxxxx@gmail.com
Person Created Date	02/12/2021 18:17:48	26/02/2022 10:59:24

At the bottom of the screen will be the merging section

Person Created Date	02/12/2021 18:17:48	26/02/2022 10:59:24
---------------------	---------------------	---------------------

Export

Merge options

Select the person record you wish to keep. If there are more than one security user record also select the one you wish to keep.
 For each relationship (e.g. members, wi advisers etc) choose what you would like to happen to the record.
 Once you have made your choices, click the Merge button - NB: This is a one way process so please make sure you have made the appropriate choices.

Retain person 678172

Retain security user

Relationships

Members (Full) at Stoke Row (Oxfordshire) (ID# 728441) Keep record and assign to person if necessary

Members (Full) at HOT (Oxfordshire) (ID# 733560) Keep record and assign to person if necessary

Merge

When you have decided which record is the main one (possibly the one which has been modified the most recently) you should select this from the 'Retain Person' dropdown menu. These relate to the 'Person ID' in the columns above.

Merge options

Select the person record you wish to keep. If there are more than one security user record also select the one you wish to keep.
 For each relationship (e.g. members, wi advisers etc) choose what you would like to happen to the record.
 Once you have made your choices, click the Merge button - NB: This is a one way process so please make sure you have made the appropriate choices.

Retain person 678172

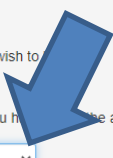
Retain security user

Relationships

Members (Full) at Stoke Row (Oxfordshire) (ID# 728441) Keep record and assign to person if necessary

Members (Full) at HOT (Oxfordshire) (ID# 733560) Keep record and assign to person if necessary

Merge



If there is a security user for this member (to enable them to log into My WI) it will show in the 'Retain Security User'.

You can then choose what you want to do with each of the entries by clicking on the dropdown menu for each entry.

Person Created By	jackierob01@gmail.com	ali.sadler52@gmail.com
Person Created Date	02/12/2021 18:17:48	26/02/2022 10:59:24

Export

Merge options

Select the person record you wish to keep. If there are more than one security user record also select the one you wish to keep.

For each relationship (e.g. members, wi advisers etc) choose what you would like to happen to the record.


Once you have made your choices, click the Merge button - NB: This is a one way process so please make sure you have made the appropriate choices.

682347

Relationships

Members (Full) at Stoke Row (Oxfordshire) (ID# 728441)

Members (Full) at HOT (Oxfordshire) (ID# 733560)



Once you have selected what you want to do with each entry, you click on the red 'Merge' button

Export

Merge options

Select the person record you wish to keep. If there are more than one security user record also select the one you wish to keep.

For each relationship (e.g. members, wi advisers etc) choose what you would like to happen to the record.


Once you have made your choices, click the Merge button - NB: This is a one way process so please make sure you have made the appropriate choices.

682347

Relationships

Members (Full) at Stoke Row (Oxfordshire) (ID# 728441)

Members (Full) at HOT (Oxfordshire) (ID# 733560)



You will then need to click on the OK button to confirm you want to go ahead

FWI_MCS2_Dev/Utilities/PeopleMerge.aspx?i=678172,682347,

development.infoworks.co.uk says

Are you sure you wish to merge these Records?

The master person record will be kept and the duplicates will be set as inactive.

This cannot be undone

