American Legion Auxiliary

Management Information System (ALA MIS)

Unit Training Manual

Updated: February 1, 2017

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Overview

The American Legion Auxiliary Management Information System (ALA MIS) is used by units and departments to manage members, units, departments and leadership information. Units are only allowed to designate up to two users for login access. This 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 continuous years of membership
- 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)

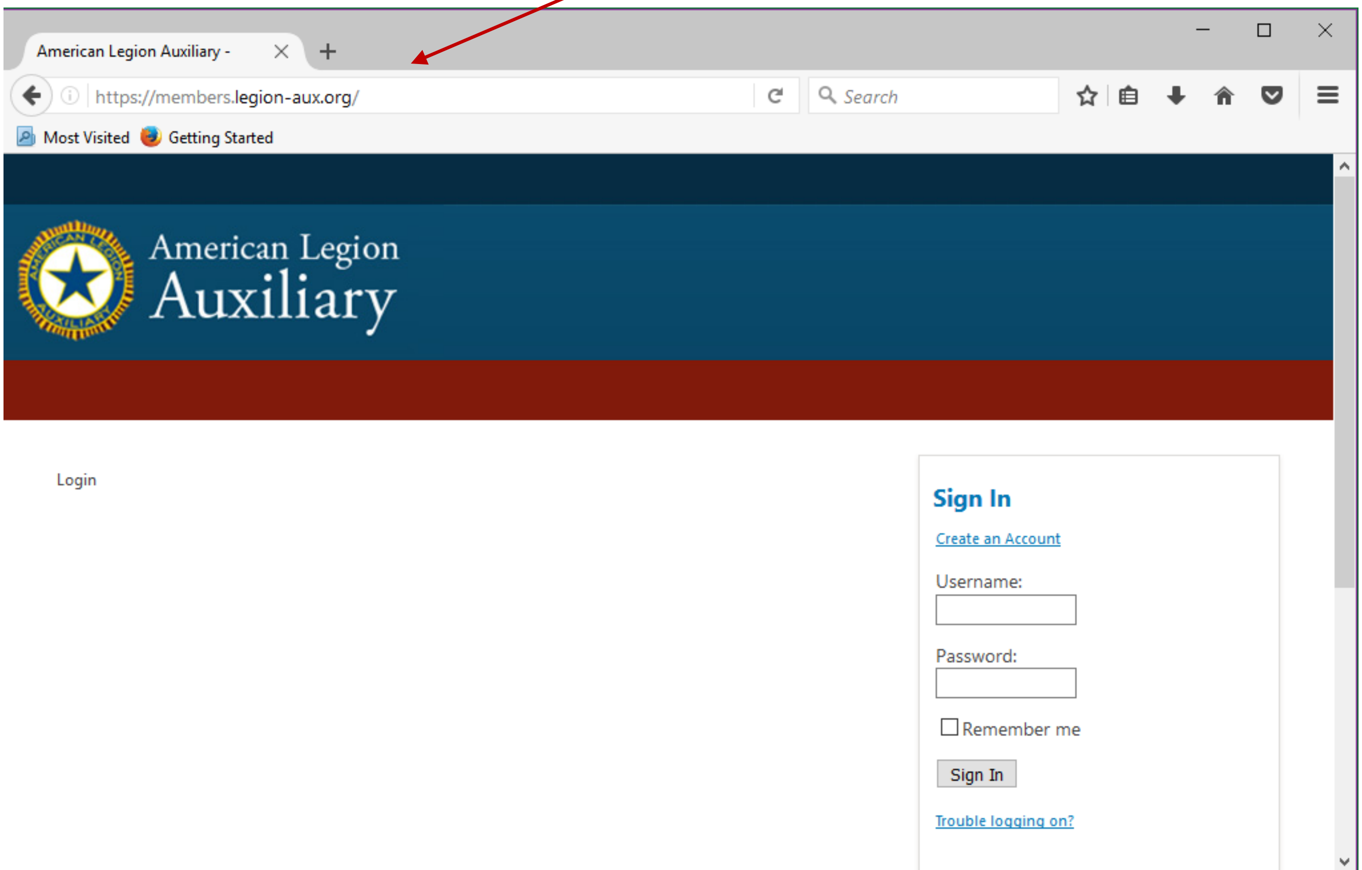
View Reports

- 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

ACCESSING ALA MIS

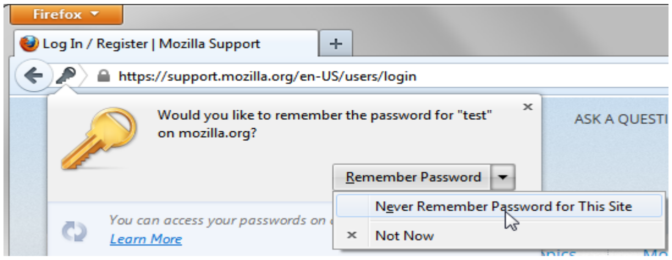
Step 1: URL *(website address)*
To access the ALA MIS, open Mozilla Firefox or Internet Explorer, enter as the URL: https://members.legion-aux.org. The ALA MIS Login Screen should appear. We do not recommend using Chrome, as it can hide some information.

This is where you type or paste the URL. If you do not see this navigation toolbar, hit CTRL+L.



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.**

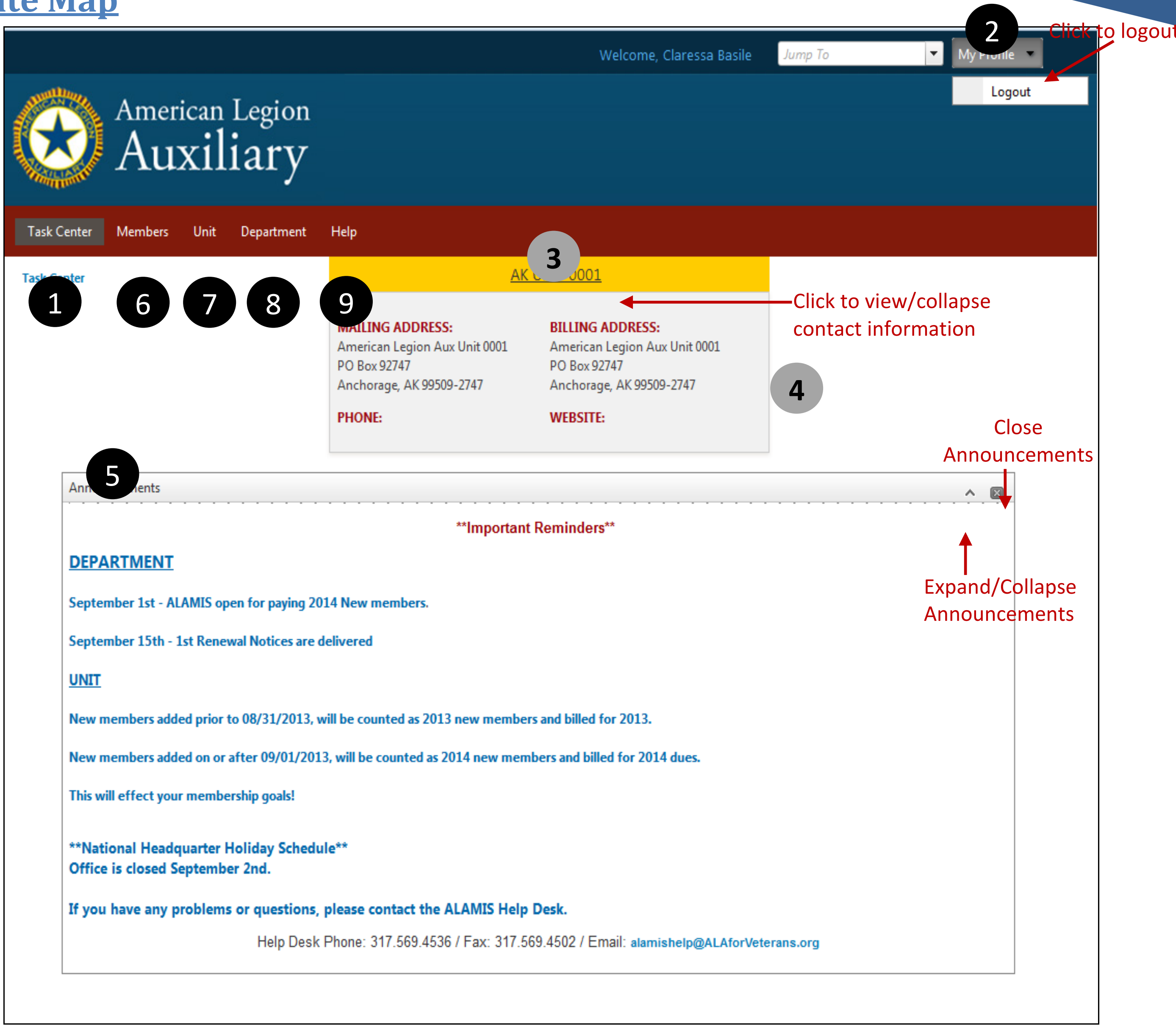


TASK CENTER

1

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

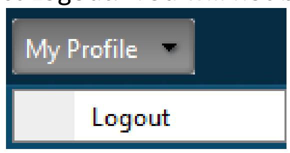


Welcome, Claressa Basile
Jump To
My Profile
Logout
Click to logout
American Legion Auxiliary
Task Center
Members
Unit
Department
Help
Task Center
1
2
3
4
5
6
7
8
9
Click to view/collapse contact information
MAILING ADDRESS:
American Legion Aux Unit 0001
PO Box 92747
Anchorage, AK 99509-2747
BILLING ADDRESS:
American Legion Aux Unit 0001
PO Box 92747
Anchorage, AK 99509-2747
PHONE:
WEBSITE:
Close Announcements
Expand/Collapse Announcements
Important Reminders
DEPARTMENT
September 1st - ALAMIS open for paying 2014 New members.
September 15th - 1st Renewal Notices are delivered
UNIT
New members added prior to 08/31/2013, will be counted as 2013 new members and billed for 2013.
New members added on or after 09/01/2013, will be counted as 2014 new members and billed for 2014 dues.
This will effect your membership goals!
National Headquarter Holiday Schedule
Office is closed September 2nd.
If you have any problems or questions, please contact the ALAMIS Help Desk.
Help Desk Phone: 317.569.4536 / Fax: 317.569.4502 / Email: alamishelp@ALAforVeterans.org

MY PROFILE

2

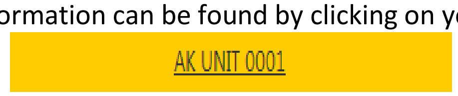
For security reasons, please **LOGOUT** and close your browser each time you exit the system. To logout, select the down arrow next to My Profile and then select Logout. You will not be able to view or edit your profile.



UNIT NUMBER OR DEPARTMENT NAME

3

The unit number will always be displayed in the middle of your screen in a yellow box no matter where you are on the site. Your unit's contact information can be found by clicking on your unit number in the yellow box.



CONTACT INFORMATION

4

Your unit's contact information is displayed by clicking on the yellow box. It can be hidden by clicking on it again.

Unit

Your unit's number, legal name, mailing (permanent) address, billing address, telephone number, and website can be found in this area. The remittance address is where unit dues should be mailed. That address may not be the same as the unit's mailing address. To make changes to the unit's telephone numbers, email address and website, go to the Unit tab and edit the unit's information. Any changes to the unit's remittance address should be sent to your department. Changing the unit's dues remittance address does not change the unit's dues remittance person and vice versa. The unit's dues remittance person is a leadership position called Unit Dues Remit. The Unit area (Section 8) of this manual will tell you how to update leadership positions in ALA MIS.

Please note that you will be able to see their mailing (permanent) address and other unit information, but you will not be able to change it. To make other changes to the unit's information, please contact us. Units cannot update their dues remittance address using ALA MIS. This can only be done by Departments or National Headquarters.

ANNOUNCEMENTS

5

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

MEMBERS TAB

6

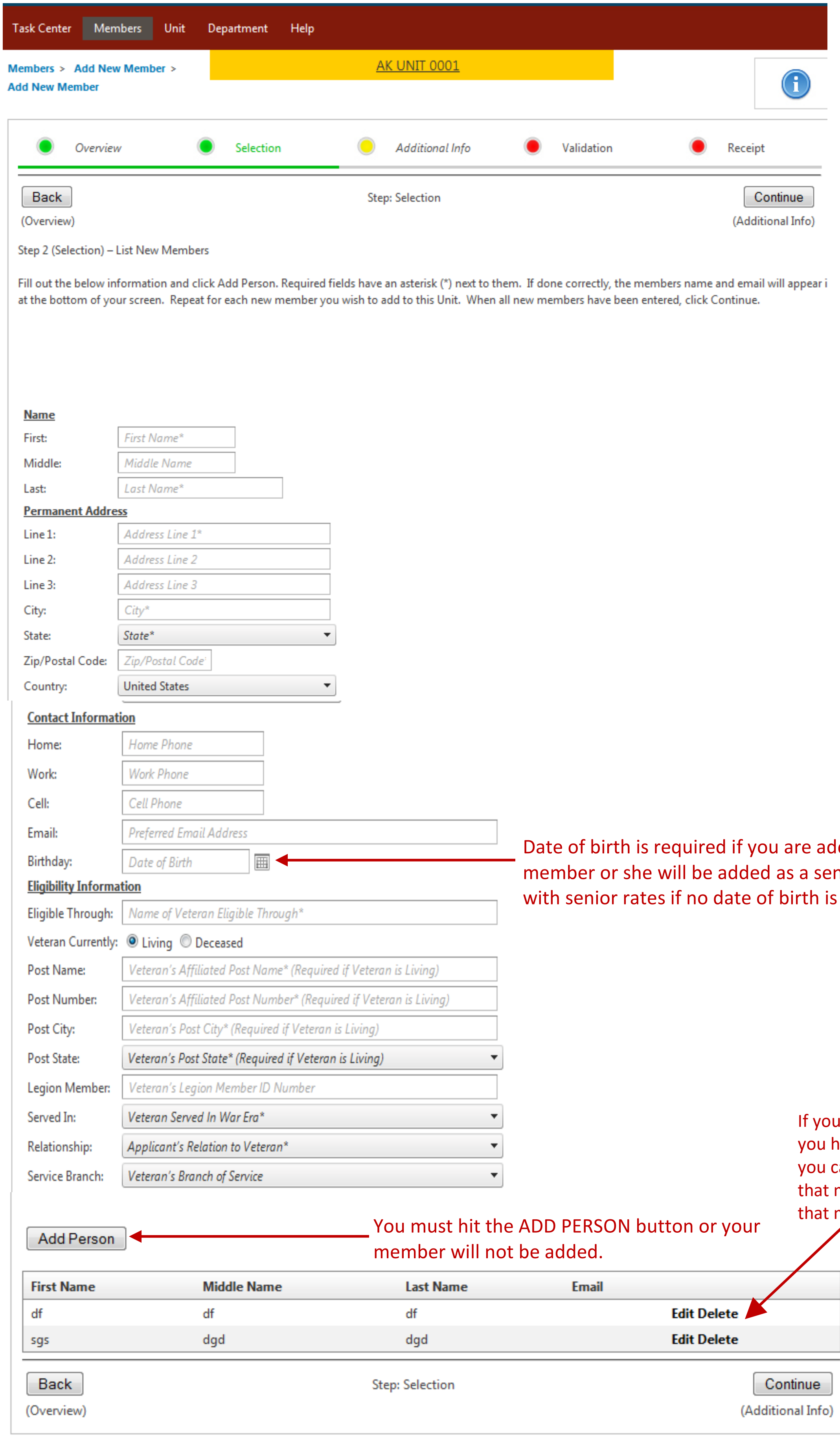
Add a New Member

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.



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.

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.

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

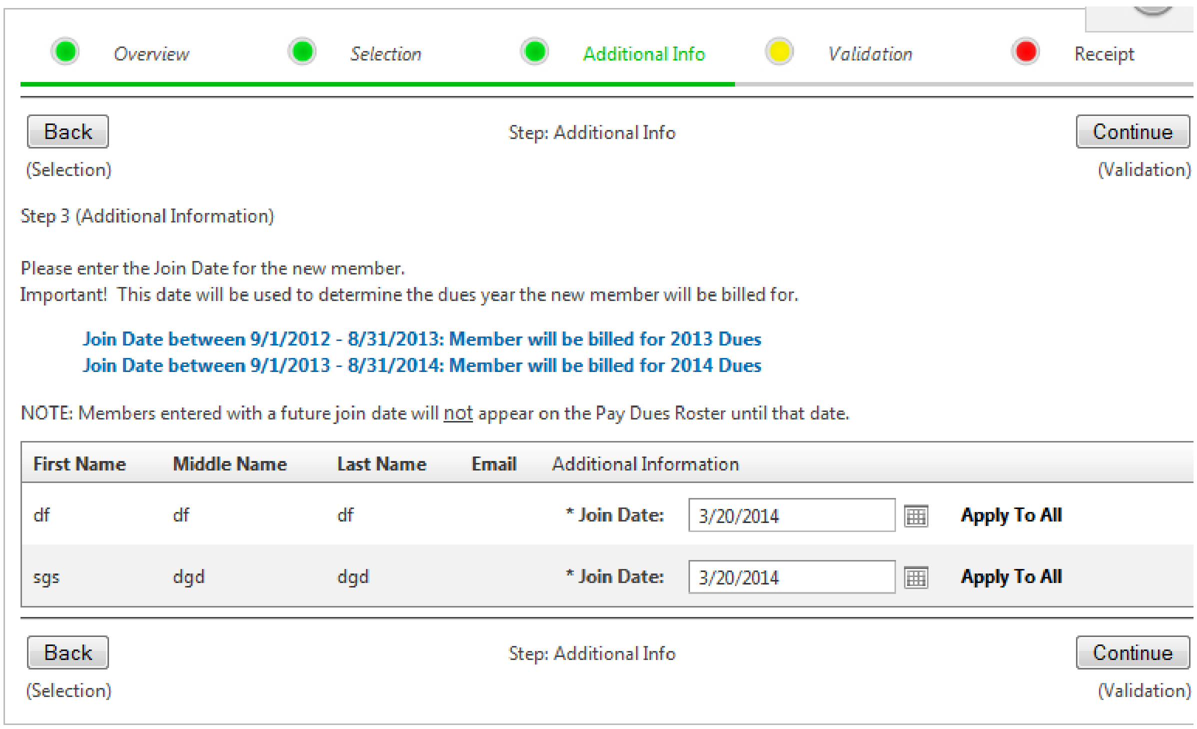
To verify that you have successfully added the member, their name and email will appear at the bottom of the screen. (See example above, Test Person) Repeat for each member you wish to add and click Continue.

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.

Beneath the members you add during this Membership Action, is a list of Pending Members/Junior Members recently added to this unit. Pending members cannot be updated or changed here. They are listed as a reference to help prevent the entry of duplicate members. Once your department has paid dues for the Pending Members, they will become active members and will no longer appear in this list.

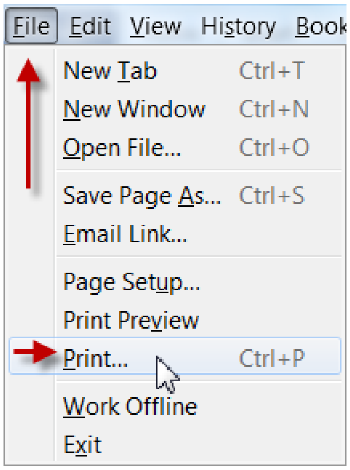
3. **Additional Info**
   Here you can change the Join Date if applicable for each member. Enter a join date before September 1 of the current membership year and the member added will be billed for current year dues. Enter a join date on or after September 1 of the current membership year and the member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

   Example: On 10/16/2010, Jane Smith is added with a Join date of 8/15/2010. Jane is billed for 2010 Dues but if Jane Smith was added on the same day with a Join date of 9/26/2010, Jane will be billed for 2011 Dues.

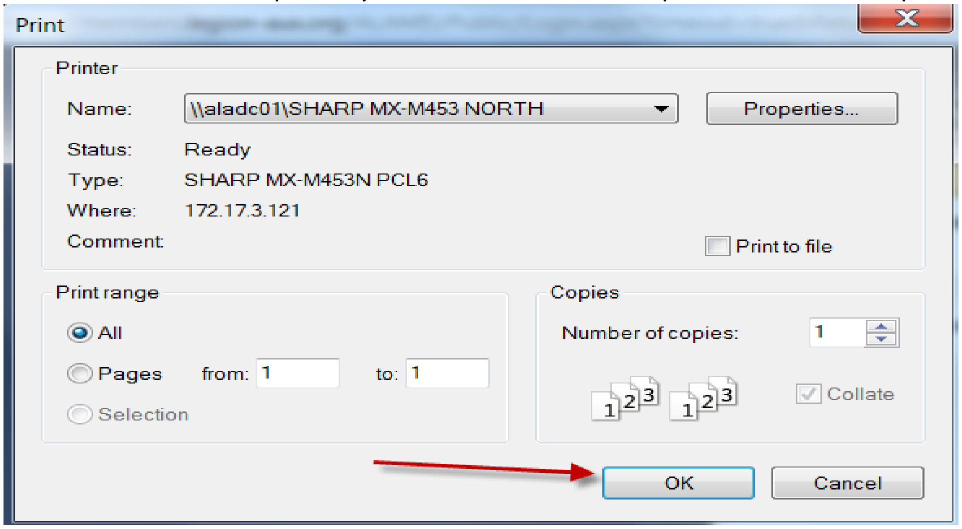


4. **Validation**
   Please review the information to ensure accuracy and enter your electronic signature exactly as it appears on the screen. Then click "Continue" to submit your transaction.

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

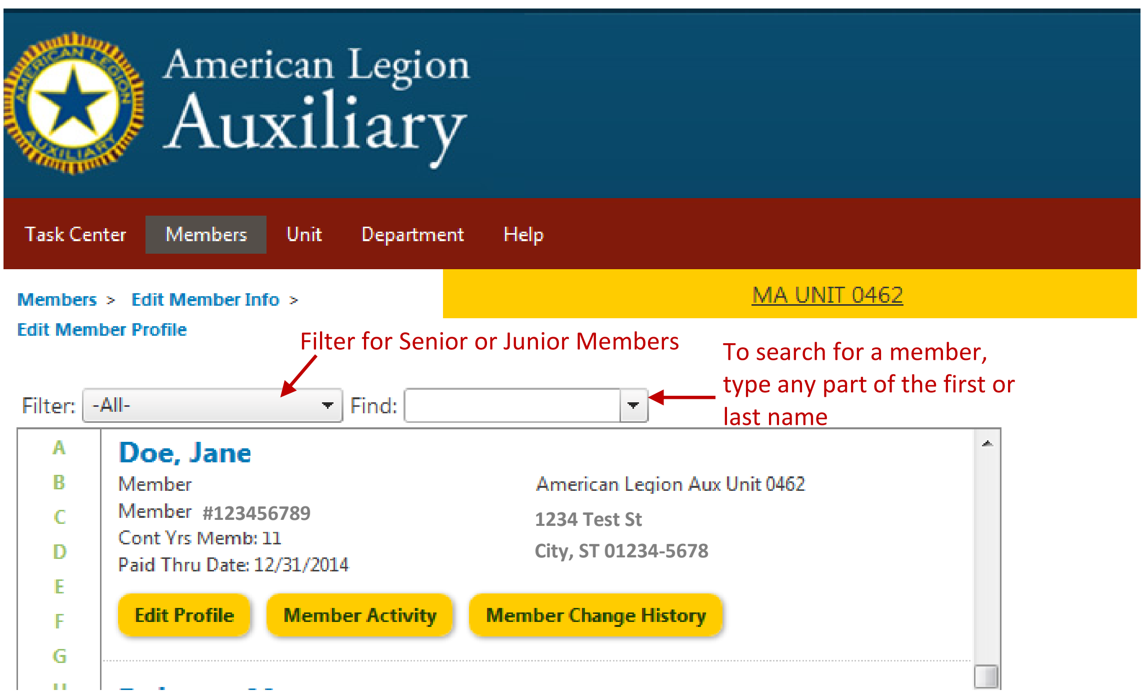
Departments/Units can view and edit demographic, personal, and membership information for the members in their Department/Unit. They can also see a report of all of an individual member's activities and/or history of all changes made to the member's record.

Edit Member Profile

Step 1: Navigation
[Members] → Edit Member Info → Edit Member Profile

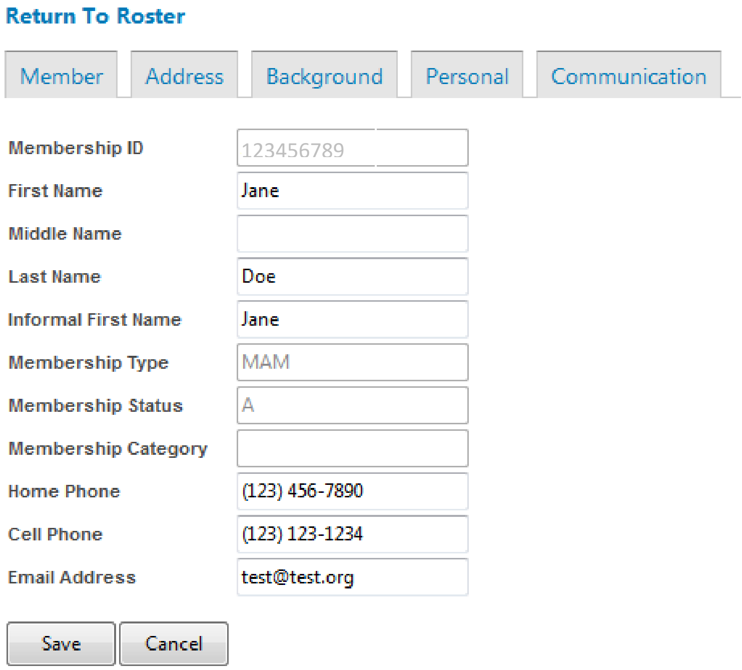
Step 2: Find Member
This screen displays basic information for all of the Current Active Members of this Unit in alphabetical order by last name. To see more detailed information and/or to make changes, first find the member using one of the following methods:

- 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



Step 3: View/Edit Member Profile Information

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



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
Membership Type Description • **MAM** – Senior Member • **MYM** – Junior Member • **PAM** – Pending Member • **PYM** – Pending Junior Member • **XAM** – Expired Member *(expired 2 years or less)* • **XYM** – Expired Junior Member *(expired 2 years or less)* • **FAM** – Former Member *(expired more than 3 years)* • **FYM** – Former Junior Member *(expired more than 3 years)* • **DMAM** – Deceased Member • **DMYM** – Deceased Junior Member
Membership Category Description • **CL** – Cancelled Membership • **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**
Join Date	*Contact NHQ to change*
Continuous Years	*Requires NHQ approval*
Initial Unit	*Contact NHQ to change*
Current Unit	*Must complete a Transfer Action to change*
Current Dept	*Must complete a Transfer Action to change*
War Era	
Volunteer Interests	
Branch Service/Legion Information	
Related Type	
Veteran related Thru	*Contact NHQ to change*

Personal Tab

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

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 Begin 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 Begin Month	
Season End Day	
Season End Month	
Temp Seasonal	

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.

1 of 1 Select a format Export

Individual Activity Report

Test, Olivia Member ID# 987654321 Printed 6/25/2010

ACTIVITY	TRANSACTION DATE	EFFECTIVE DATE	PRODUCT CODE	DESCRIPTION	SOURCE SYSTEM	AMOUNT	POSITION CODES	NOTE
Dues Payments	8/3/2009	1/1/2010	10NATL		DUES	$5.00	A	
Dues Payments	8/3/2008	1/1/2009	09NATL		DUES	$5.00	A	
Dues Payments	7/30/2007	1/1/2008	08NATL		DUES	$5.00	A	
Dues Payments	9/26/2006	1/1/2007	07NATL		DUES	$5.00	A	
Dues Payments	9/18/2006		NATLVIM		DUES	$481.00	A	
Dues Payments	2/22/2006	1/1/2006	06NATL		DUES	$5.00	A	

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**

In the Reports area, Units can see a report of all of the changes made to the member records in their entire Unit. Here the same information is displayed for each individual member.

1 of 1 Select a format Export

Member Change Log

Olivia Test Printed 6/25/2010

ID	DATE TIME	SUB TYPE	USER ID	LOG TEXT
123456789	6/25/2010	CHANGE	SCRIPT	Name.MEMBER_TYPE: MYM -> MAM
123456789	6/25/2010	CHANGE	111111111	NAME.LAST_NAME: Auxiliary -> Kelly
123456789	5/25/2010	CHANGE	SCRIPT	Demo_Individual.IN_CURRENT_DEPT: -> WA
123456789	5/25/2010	CHANGE	SCRIPT	Demo_Individual.IN_CURRENT_UNIT: -> 0134
123456789	1/6/2006	CHANGE	ALJAR	COMDTL.ADDR: 1234 MAPLE AVE SW SEATTLEWA 98146

UNIT TAB

7

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

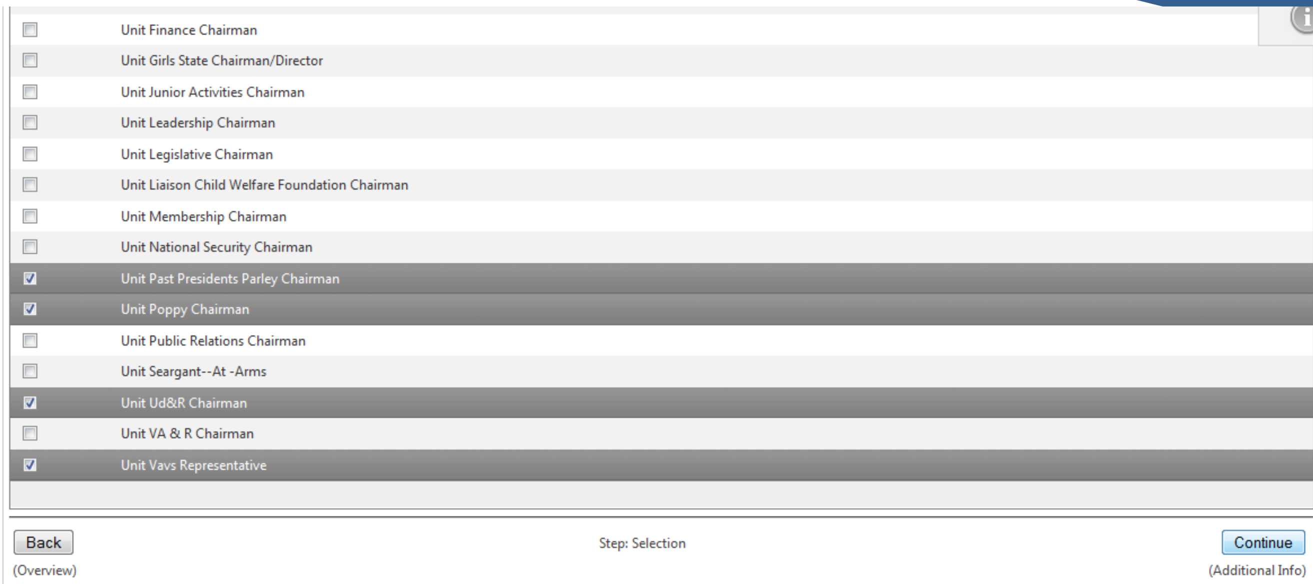
Step 2: Action Steps

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 September 20, 2013

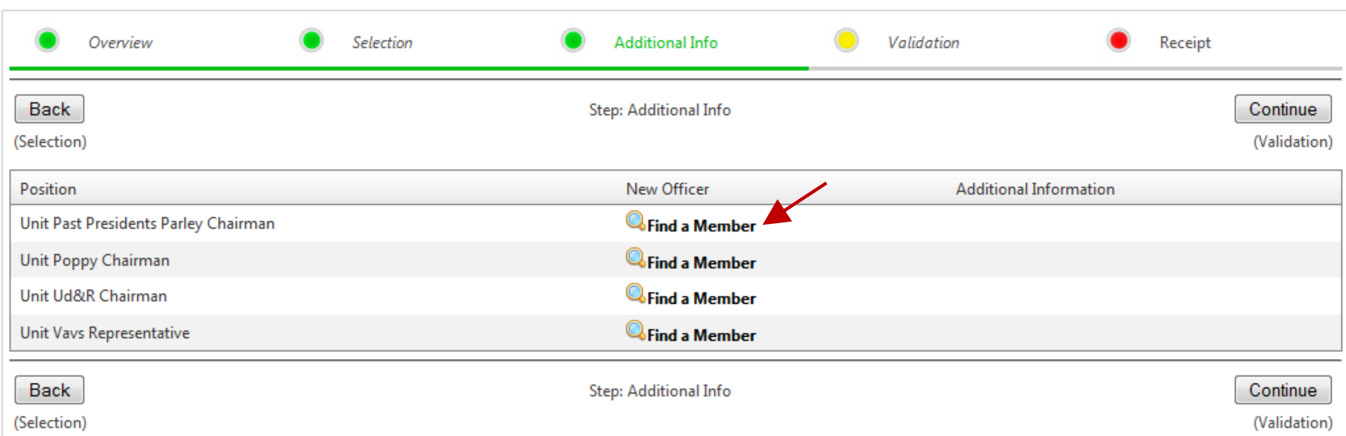
Unit AEF Chairman
Unit Americanism Chairman
Unit Cavalcade Of Memories Chairman
Unit Chaplain
Unit Children & Youth Chairman
Unit Community Service Chair
Unit Constitution & Bylaws Chairman
Unit Director Of Hospital Volunteers
Unit Dues Remit
Unit Education Chairman
Unit Field Service Director
Unit Finance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

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

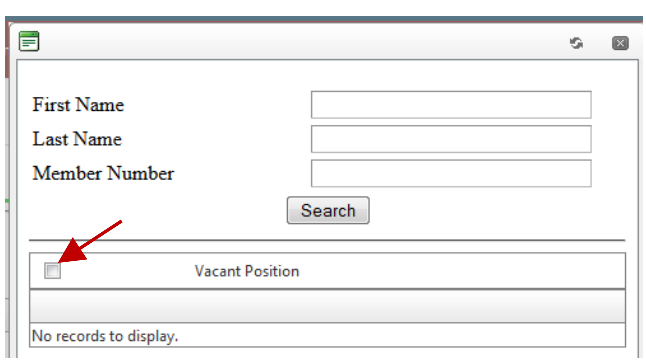


2. Additional Information

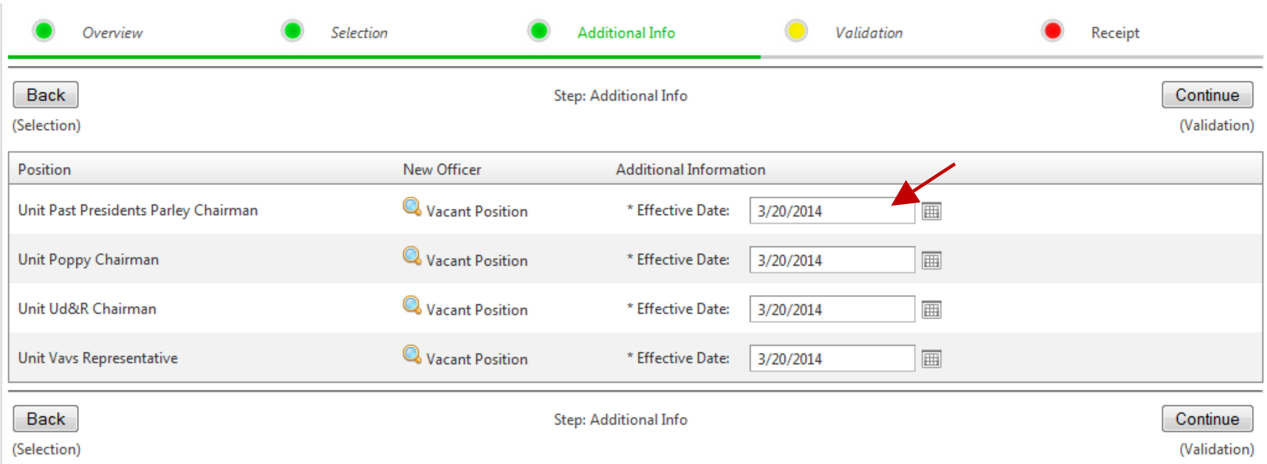
Click the Find a Member link next to the leadership position to assign a new leader to each position or to mark a position vacant – do this one position at a time.



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



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



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

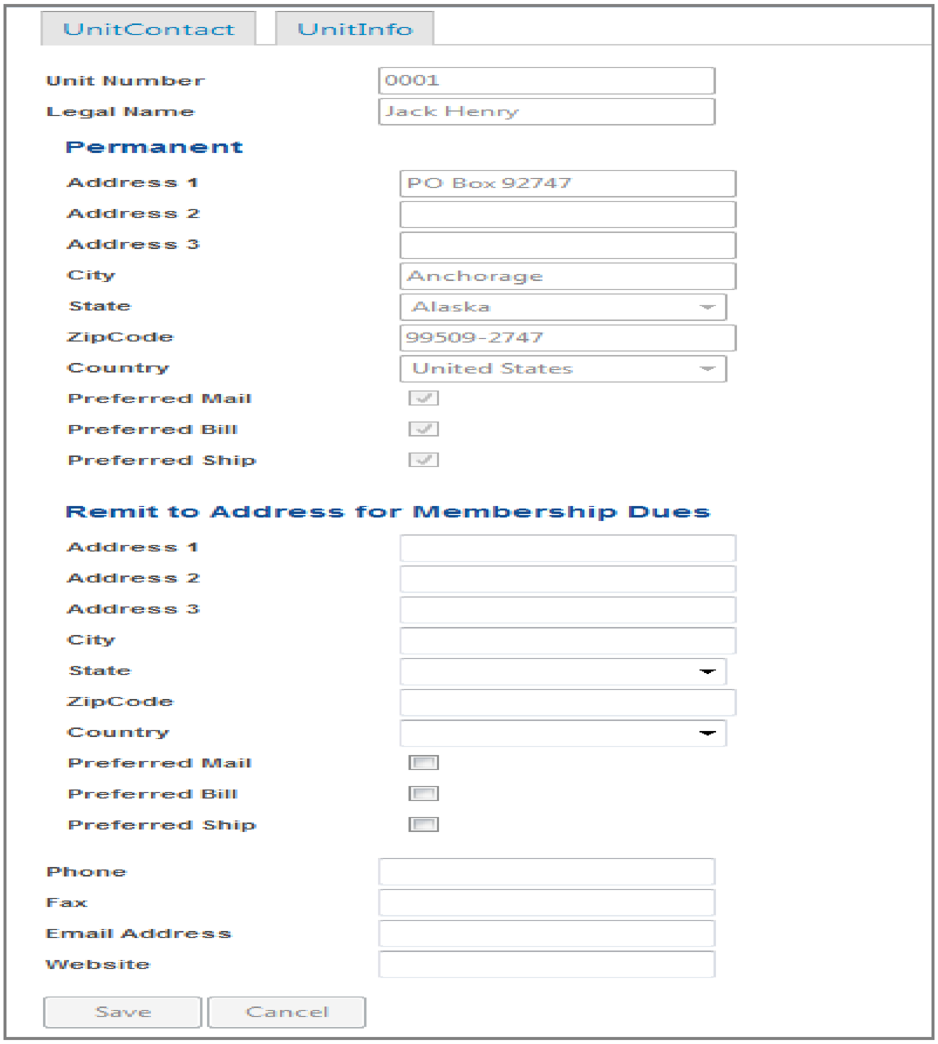
Step 2: Edit Profile
The Unit profile data is divided into 2 tabs:

- Unit Contact
- Unit Info

Each tab displays different fields, some of which can be edited by Departments and/or Units and others are Read-Only.

Unit Data Field Information

UNIT CONTACT TAB


UnitContact | UnitInfo

Unit Number: 0001
Legal Name: Jack Henry

Permanent

Address 1: PO Box 92747
Address 2:
Address 3:
City: Anchorage
State: Alaska
ZipCode: 99509-2747
Country: United States
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:

Save | Cancel

Field	Dept Edit	Unit Edit	Note/Membership Action**
Unit Number	*No*	*No*	*Cannot be changed*
Legal Name	*No*	*No*	*Can only be changed by National*
Permanent Address	*No*	*No*	*Can only be changed by National*
Remit to Address for Membership Dues	Yes	*No*	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

Field	Dept Edit	Unit Edit	Note/Membership Action**
# Jr Members	*No*	*No*	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	*No*	*No*	
# VIM members	*No*	*No*	
# Paid Dues Members	*No*	*No*	
# Unpaid Dues Members	*No*	*No*	
E Unit	*No*	*No*	
Widow Unit	*No*	*No*	
EIN Number	*No*	*No*	
Unit Info Legal Name	*No*	*No*	*Can only be changed by National*
Division/District/County	*No*	*No*	*Can only be changed by National*
Division/District/County	*No*	*No*	*Can only be changed by National*
Charter Date	*No*	*No*	*Can only be changed by National*
Unit Number	*No*	*No*	*Cannot be changed*
Department	*No*	*No*	

Unit Reports

Membership Roster

The Membership Roster includes all members in the unit. This list includes junior members. This list excludes expired and former members. Expired members are defined as members that expired 2 years ago or less (have not paid dues in two years). Former members are defined as members that have expired 3 years or more (have not paid dues in three or more years).

Leadership Roster

The Leadership Roster includes the names and contact information for the unit leaders. It also includes their position. To edit or add additional leaders, please go to the unit tab and edit unit leaders.

Dues Reports

Unit Dues Paid Online

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

Unit Paid Dues Roster

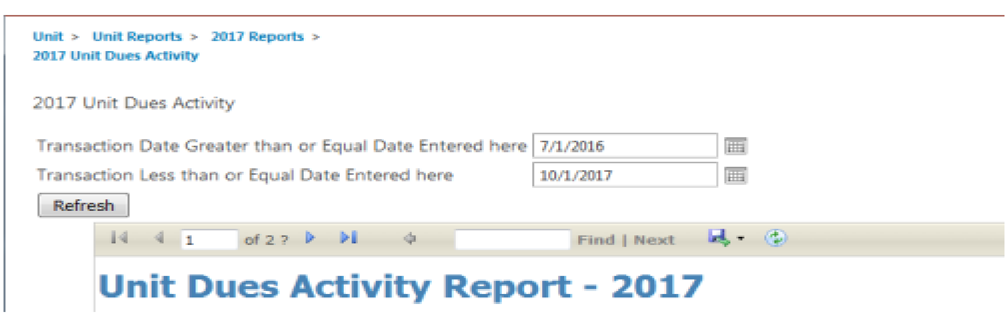
The Paid Dues Roster Report includes a list of all members who have paid dues for the year that you selected and they are currently in the unit you have pulled up. It doesn't matter what unit those members paid their dues to so this report will include members who transferred into the unit, but paid their dues to their old unit before they transferred into their new unit. It includes the member's ID number, name, address, whether the member has a good address, the member type, the number of continuous years of membership, and the member's date of birth. This report will also tell you the total number of members that have paid for the year that you selected.

Unit Unpaid Dues Roster

The Unpaid Dues Roster Report includes a list of all members who have not paid dues for the year that you selected. It includes the member's ID number, member type, name, address, phone number, email address, and paid through date.

Unit Dues Activity Report

The Dues Activity Report includes a list of all members who have paid dues for the year that you have selected. It also tells you the date that the member paid dues and the amount of the dues they paid to national. This report also includes the member's name and ID number. You can choose a date range with this report. You can also sort by the transaction date. Lastly, this report tells you the total amount that was for national dues by this unit for the date range selected. To enter a date range, enter the minimum date in the Transaction Date Greater than or Equal Date Entered here. Enter the maximum date in the Transaction Less than or Equal Date Entered here. The example below would find all 2017 unit dues paid between 7/1/2016 and 10/1/2017.



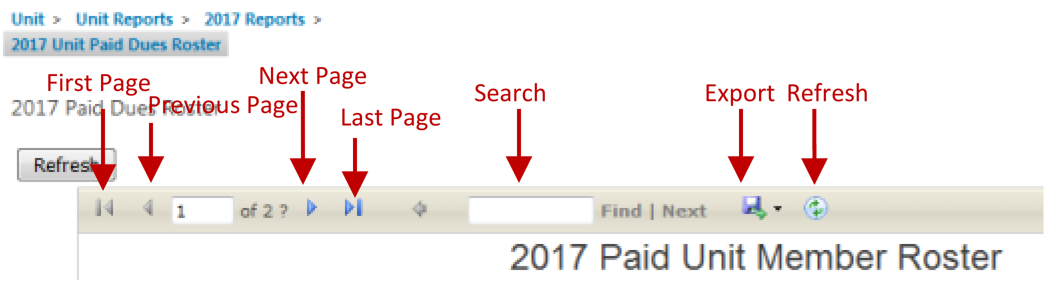
REPORTS OVERVIEW

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 → 2017 Reports → Unit Paid Dues Roster

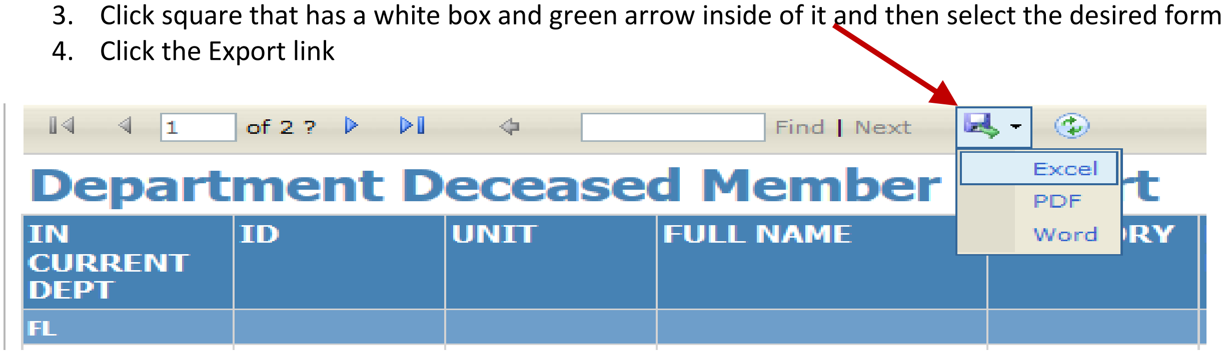
On the Report toolbar, you can scroll through the pages using the right and left arrows, adjust the size of the page view, search for a record in the report, export all records, refresh the data or send the report to print.



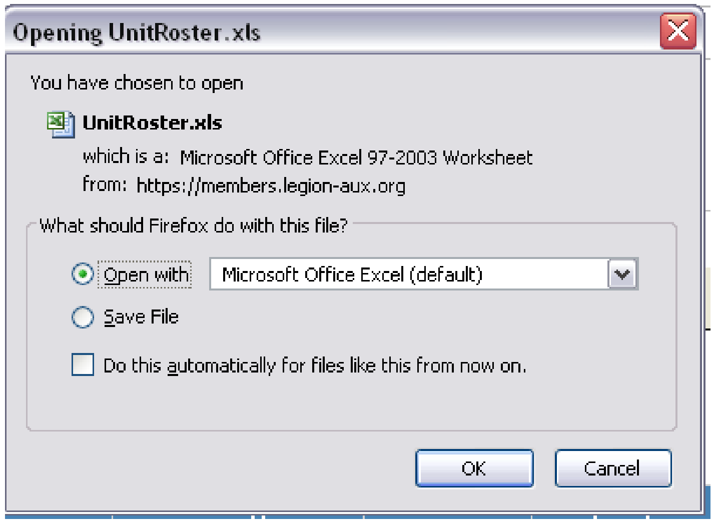
Export a Report

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

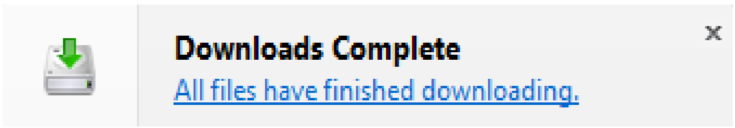
1. Navigate to Report
2. Filter and sort report as needed
3. Click square that has a white box and green arrow inside of it and then select the desired format
4. Click the Export link



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



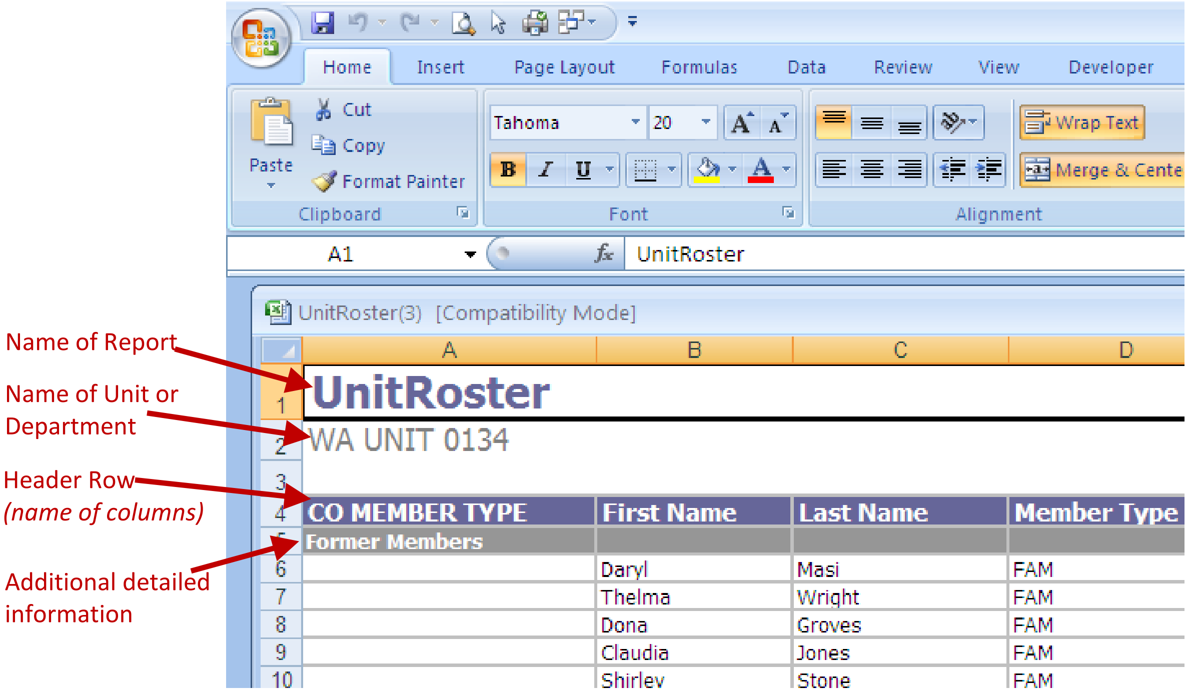
6. The message below will appear on the bottom right of your screen.



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

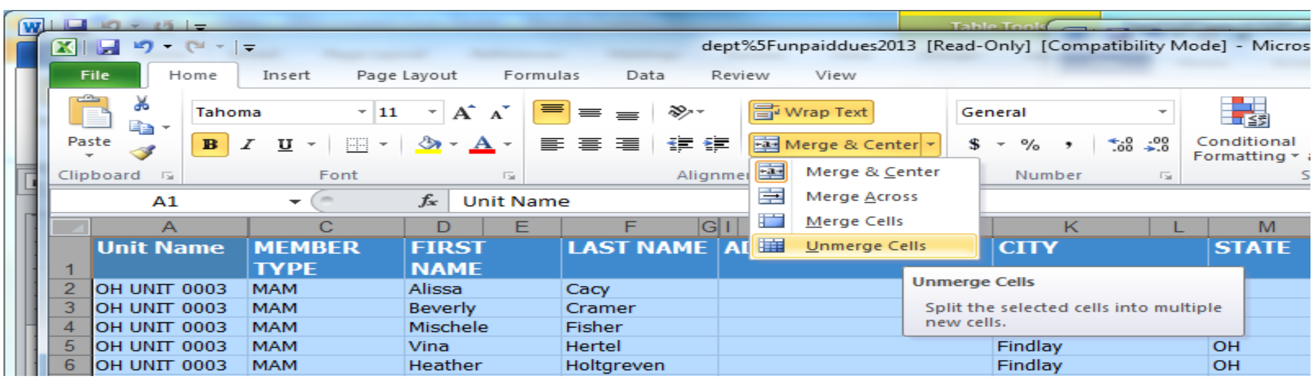
Excel

Excel exports will open up an Excel spreadsheet.

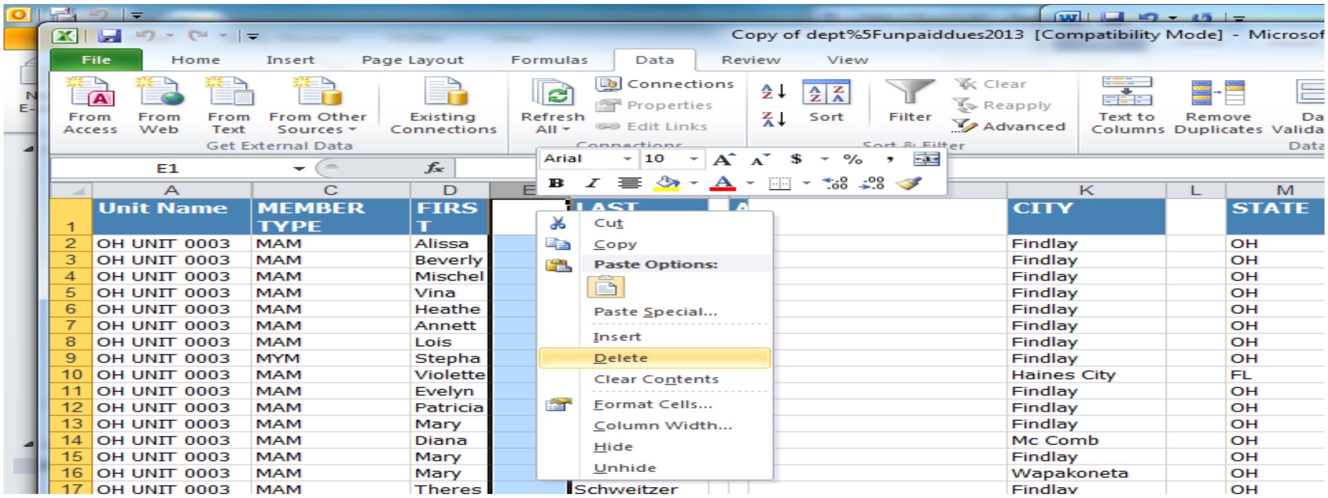


The name of the report will usually appear in row 1. The name of the department or unit will usually appear in row 2. Additional rows may have more detailed information. If you want to sort your data, then you will need to delete the first couple of rows so only the header row appears in Row 1 and the 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.



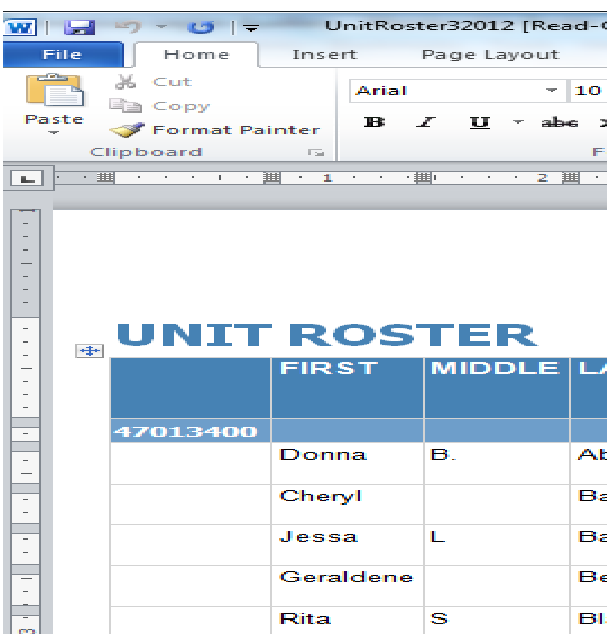
Next, you will need to delete any blank columns you may have. These columns don't have a header name. To do this, select the column, right-click and choose DELETE.



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.

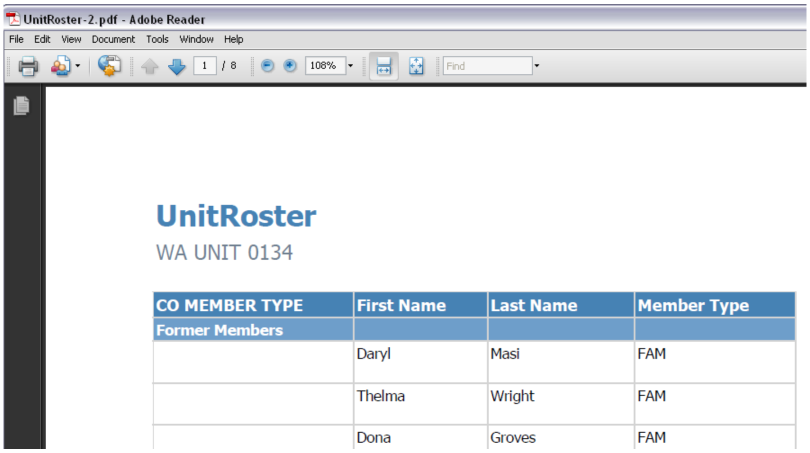
Word

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.



DEPARTMENT TAB

8

Only Departments have access to the Department tab.

Help Tab

9

Training Materials

Training materials and system documentation can be found under the Help tab of the website. Training videos on a variety of tasks and membership actions will be uploaded at a later date.

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.

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