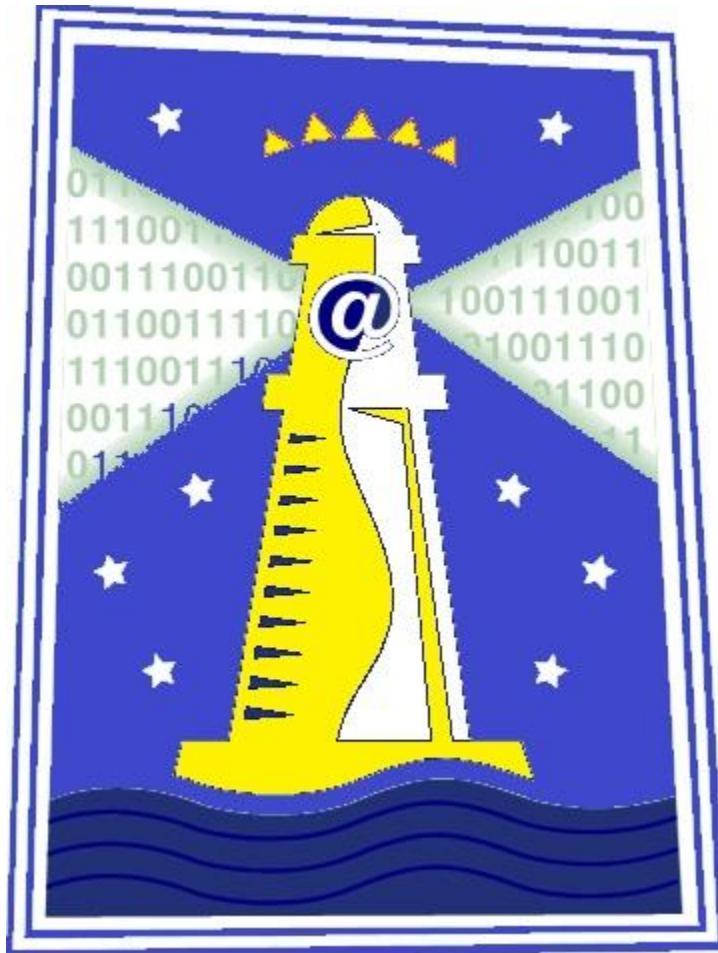


# Membership Registry

## Usage Guide NSTU Reps



*September 2017*

## Contents

Contents.....	1
Foreword.....	2
Introduction .....	3
Personal Profile Access Instructions .....	4
Site Management Instructions.....	5
Edit Site .....	6
Employment Status.....	6
Employment Status – New Site.....	7
Missing from Site .....	8
Missing from Site – Not in the System.....	10
Saving Changes .....	11
Submitting Completed Information.....	11
Sending Emails .....	11
Personalizing Messages .....	12
Subject .....	13
Attachments.....	14
Send .....	14

## Foreword

This Usage Guide contains basic information and is not intended as full and comprehensive instructions.

Should you have any questions or if you require any assistance contact Bev Tufts by email ([btufts@staff.nstu.ca](mailto:btufts@staff.nstu.ca)) or by phone 477-5621, 1 (800) 565-6788.

## Introduction

NSTU Representatives should be updating the membership registry online and in real time. When updating the site list, the changes are made to the database immediately ensuring the Union's membership information is current and accurate.

Individual members can also update all their personal, employment, assignment and contact information.

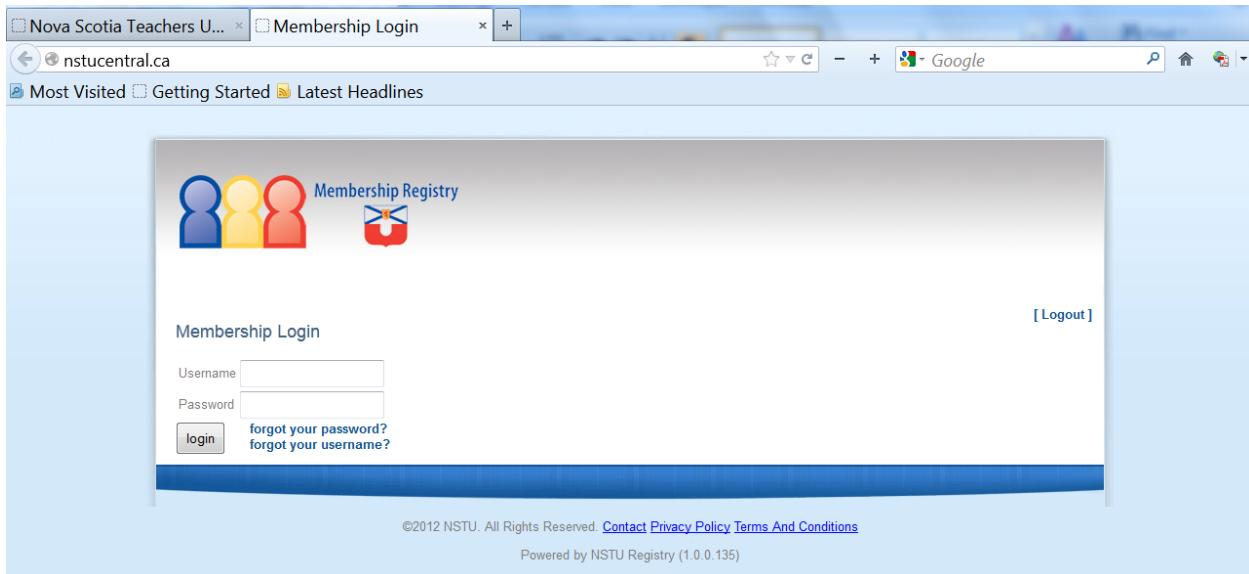
Membership figures are pulled from the Registry on the first Monday in December and the first Monday in March each year. NSTU representatives are responsible for ensuring the accuracy of the site information within the Membership Registry. All site updates should be completed at least one week prior to each of the above mentioned dates and may be completed any time prior to that point. The following instructions are intended to assist you with this process. For your convenience we have also included separate site management instructions for NSTU reps and instructions for members to access their individual profile. Should you require additional information please contact NSTU Central Office.

## Personal Profile Access Instructions

- 1) Proceed to the NSTU website ([www.nstu.ca](http://www.nstu.ca)). Access to the Membership Registry is available by clicking on the icon () located on the homepage or through the Membership Registry page which is located under the menu item “The NSTU” submenu item “Membership.”
- 2) The next screen will be the login page. Login to your profile is based on your NSTU web account username and password.
- 3) If you do not have an NSTU web account, activation has been automated. You may activate a free account from the NSTU website. Simply follow this link (<http://www.nstu.ca/the-nstu/communications/nstu-web-account/>) to the page containing activation information. Please read the information on the page carefully before activating your account.

## Site Management Instructions

Proceed to the NSTU website ([www.nstu.ca](http://www.nstu.ca)) and access your personal profile in the NSTU Membership Registry. Access to the Membership Registry is available by clicking on the icon (  ) located on the homepage or through the Membership Registry page which is located under the menu item “The NSTU” submenu item “Membership.” (**Important Note:** Access to your profile is based on your NSTU web account username and password.)



Once you login a homepage will appear. As an NSTU Rep you will be presented with two options. You may either “Edit Profile” (your personal information) or “Edit Site”. (**Please Note: NSTU Reps do not have the ability to self-identify. Local Presidents will identify these assignments.**)



## EDIT SITE

If you click on “Edit Site” you will be presented with the following screen:

The screenshot shows the 'Membership Registry' interface for 'Test Site No 1'. At the top right is a '[Logout]' link. Below it is a navigation bar with a 'Save' button and a checkbox for 'Submit Completed Information'. The main section is titled 'Members:' and contains a table with three rows of member data. Each row includes a search input field, an 'Add' button, and a dropdown menu for 'Current Employment Status'. The dropdown menu options are: Active, Retired, and Unknown. The first member's status is set to 'Active'. The second member's status is set to 'Retired'. The third member's status is set to 'Active'.

## Employment Status

If a member on the list is no longer at the site, and you know the reason why, you should click on “Employment Status” and select the reason. If the member has retired please check the “Retired” box. If you are uncertain of the reason they are no longer at the site you may select “Unknown” from the dropdown list.

This screenshot is identical to the one above, but the dropdown menu for the first member's employment status is currently open. The menu is titled 'N/A' and lists various leave and status options: Active, Job Share, Leave of Absence, Deferred Leave, Permanent Part-time, Full Time Study, Paid Sick Leave, Unpaid Sick Leave, Maternity Leave, Parental Leave, Substitute, Secondment, In-Province Teacher Exchange, Leave For Injury On Duty, NSCC Auxiliary, NSCC Term, Inactive, New Site, and Unknown. The 'Active' option is highlighted.

## Employment Status – New Site

If you select “New Site” from the dropdown list another field will appear. Once you begin to type a site name into the field it will present you with options. Click on the name of the site and it will pop into the field. (See the next three screenshots.)

The screenshot shows the 'Membership List For Test Site No 1' page. In the 'Members' section, there is a table with three rows of data. The first row has columns for Professional # (123456), Username (jfictitious), Name (Fictitious, Johnnie), Current Employment Status (Retired), and a dropdown menu labeled '(type to search)'. The second row has columns for Professional # (123456789), Username (jamestest222 test, test), Name (Test, Damien), Current Employment Status (Active), and a dropdown menu labeled 'Retired'. The third row has columns for Professional # (1234567), Username (regtest1), Name (Test, Damien), Current Employment Status (Active), and a dropdown menu labeled 'Retired'. A 'Save' button is located below the table.

This screenshot is similar to the one above, showing the 'Membership List For Test Site No 1' page. The 'Members' section displays the same table of data. The dropdown menu in the first row's status column now has a list of options: 'Lock', 'Lockport Elementary School - undefined', 'Lockport Regional High School - undefined', and 'Lockview High School - undefined'. The 'Save' button is also present.



**Membership Registry**

[ Logout ]

Membership List For Test Site No 1

Navigation  
Go To Home

Submit Completed Information

**Members:**

(Start typing to search)    Display Active Employment Status Only

Professional #	Username	Name	Current Employment Status	Retired	Employment Status
123456	jfictitious	Fictitious, Johnnie	New Site	<input type="checkbox"/>	Retired <input type="checkbox"/> Lockview High School
123456789	jamestest222	test, test	Active	<input type="checkbox"/>	Retired <input type="checkbox"/>
1234567	regtest1	Test, Damien	Active	<input type="checkbox"/>	Retired <input type="checkbox"/>

## Missing from Site

If a member is missing from the site enter their professional number into the field above the list that says “start typing to search”. The system will present you with a list of names which will narrow down to a single name once all the digits have been input. When you see the name to be input, select it. Once it replaces the number in the box select “Add”. This will add the member to the bottom of the list. (Note: Once any changes are saved the name will move to the appropriate spot alphabetically.) See the next four screenshots.



**Membership Registry**

[ Logout ]

Membership List For Test Site No 1

Navigation  
Go To Home

Submit Completed Information

**Members:**

(Start typing to search)    Display Active Employment Status Only

Professional #	Username	Name	Current Employment Status	Retired	Employment Status
123456	jfictitious	Jane, Fictitious - ficititious	New Site	<input type="checkbox"/>	Retired <input type="checkbox"/>
123456789	jamestest222	Johnnie, Fictitious - jfictitious	Active	<input type="checkbox"/>	Retired <input type="checkbox"/>
1234567	regtest1	test, test - jamestest222	Active	<input type="checkbox"/>	Retired <input type="checkbox"/>
		Damien, Test - regtest1			

 Membership Registry

[ Logout ]

Membership List For Test Site No 1

Navigation —

Go To Home

Submit Completed Information

**Members:**

(Start typing to search) Jane, Fictitious - fictitious   Display Active Employment Status Only

Professional #	Username	Name	Current Employment Status	
123456	jfictitious	Fictitious, Johnnie	Active	▼ Retired <input type="checkbox"/>
123456789	jamestest222 test, test		Active	▼ Retired <input type="checkbox"/>
1234567	regtest1	Test, Damien	Active	▼ Retired <input type="checkbox"/>

 Membership Registry

[ Logout ]

Membership List For Test Site No 1

Navigation —

Go To Home

Submit Completed Information

**Members:**

(Start typing to search) Jane, Fictitious - fictitious   Display Active Employment Status Only

Professional #	Username	Name	Current Employment Status	
123456	jfictitious	Fictitious, Johnnie	Active	▼ Retired <input type="checkbox"/>
123456789	jamestest222 test, test		Active	▼ Retired <input type="checkbox"/>
1234567	regtest1	Test, Damien	Active	▼ Retired <input type="checkbox"/>
123457	fictitiousj	Fictitious, Jane	Active	▼ Retired <input type="checkbox"/>



**Membership Registry**

[ Logout ]

Membership List For Test Site No 1

Navigation —

Go To [Home](#)

[Save](#)

Submit Completed Information

**Members:**

(Start typing to search)	Add	<input type="checkbox"/> Display Active Employment Status Only	
Professional #	Username	Name	Current Employment Status
123456	fictitious	Fictitious, Johnnie	Active ▾ Retired <input type="checkbox"/>
123457	fictitiousj	Fictitious, Jane	Active ▾ Retired <input type="checkbox"/>
123456789	jamestest222 test, test		Active ▾ Retired <input type="checkbox"/>
1234567	regtest1	Test, Damien	Active ▾ Retired <input type="checkbox"/>

### ***Missing from Site – Not in the System***

If the member is NOT in the system you will receive the message “no match found”. If this occurs please ensure that the member completes a “Membership Information” form and submit it to Central Office so that we may input them into the system. Once they have been entered they will automatically appear on your site. **Until the member completes and submits the “Membership Information” form, that person will not be included in the membership database and; therefore, not in the Local’s membership numbers.** (NOTE: “Membership Information” forms may now be completed and submitted electronically. The forms are available on the NSTU website on the Membership Registry page, or under the menu item “Communications” – submenu item “Online Forms.”)



**Membership Registry**

[ Logout ]

Membership List For Test Site No 1

Navigation —

Go To [Home](#)

[Save](#)

Submit Completed Information

**Members:**

(Start typing to search)	Add	<input type="checkbox"/> Display Active Employment Status Only	
Professional #	Username	Name	Current Employment Status
123456	fictitious	Fictitious, Johnnie	Active ▾ Retired <input type="checkbox"/>
123457	fictitiousj	Fictitious, Jane	Active ▾ Retired <input type="checkbox"/>
123456789	jamestest222 test, test		Active ▾ Retired <input type="checkbox"/>
1234567	regtest1	Test, Damien	Active ▾ Retired <input type="checkbox"/>

**no match found**

## SAVING CHANGES

In order to save any changes, you must click the “Save” button at the top of the page. Once this button has been clicked, any updates that have been made are saved.

## SUBMITTING COMPLETED INFORMATION

When you are satisfied that all the necessary changes have been made to the list simply select the box for “submit completed information” then click the “Save” button.

Note: Additional changes may still be made after both these steps.

## Sending Emails

NSTU Reps now have the ability to send emails to all members of their site through the Membership Registry.

An email button has been added to the Edit Site page.

The screenshot shows the 'Membership List For Pretend Site' page. At the top left are three stylized human icons (blue, yellow, red). To the right is the 'Membership Registry' logo featuring a shield with a flag. On the far right is a '[Logout]' link. Below the header, there's a 'Navigation' section with a 'Go To Home' link. A large blue arrow points from the 'Send Email' button back towards the top left of the page. The main content area is titled 'Members:' and contains a search bar with placeholder text '(Start typing NSCC or Professional Number to search)' and an 'Add' button. There's also a checkbox for 'Display Active Employment Status Only'. A list of members is shown with columns for Professional #, Username, Name, and Current Employment Status (with dropdown menus for each). The list includes:

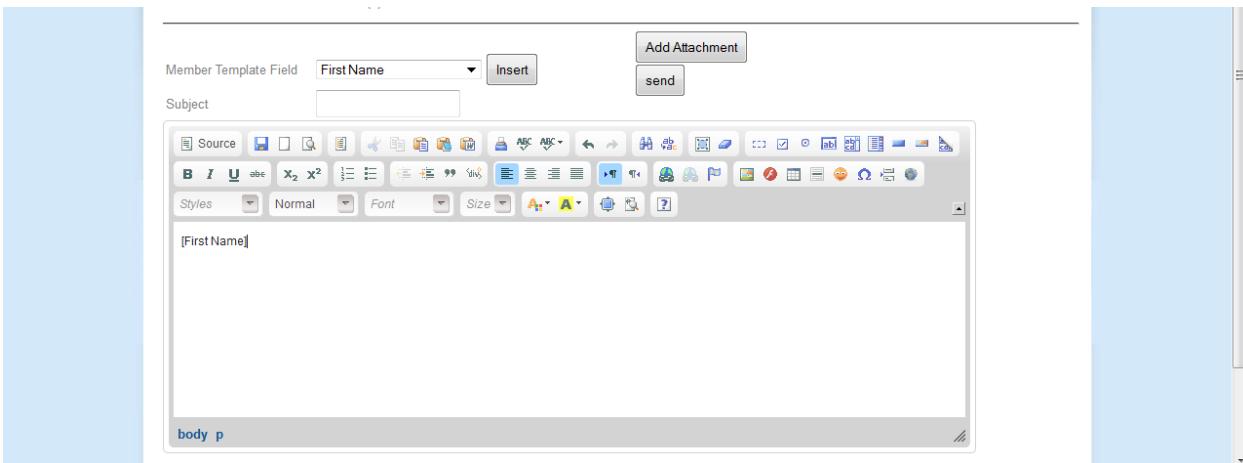
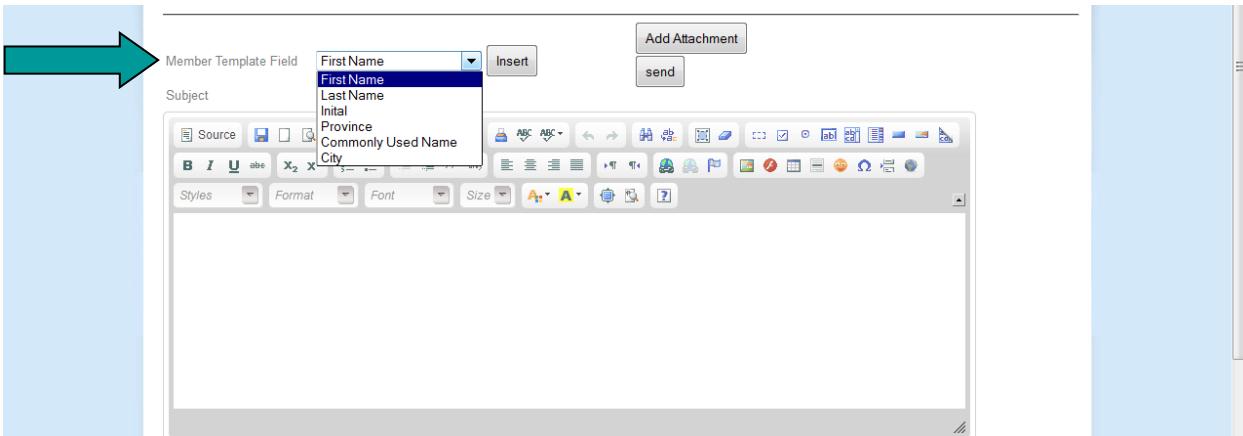
Professional #	Username	Name	Current Employment Status
123456	jfictitious	Fictitious, John	Active ▾ Retired <input type="checkbox"/>
123457	fictitiousj	Fictitious, Jane	Active ▾ Retired <input type="checkbox"/>
145678	simaginary	Imaginary, Sally	Maternity Leave ▾ Retired <input type="checkbox"/>

Once you select the button, the following screen will appear:

The screenshot shows the 'Membership Registry' interface. At the top left are three stylized human icons (blue, yellow, red). Next to them is the text 'Membership Registry' and a small logo. On the right side is a '[Logout]' link. Below the header, the title 'Email Send To Lists' is displayed, along with a 'Navigation' link and a 'Go To Home' button. A large central area is labeled 'Email Progress' and contains a progress bar. Below the progress bar, a message states 'There are 3 unique member(s) from the following lists:'. Underneath this, there are fields for 'Member Template Field' (set to 'First Name'), 'Insert' (button), 'Add Attachment' (button), and 'send' (button). A detailed toolbar for email composition is visible, featuring various icons for text styling, tables, images, and other formatting options. The bottom of the page has a blue footer bar.

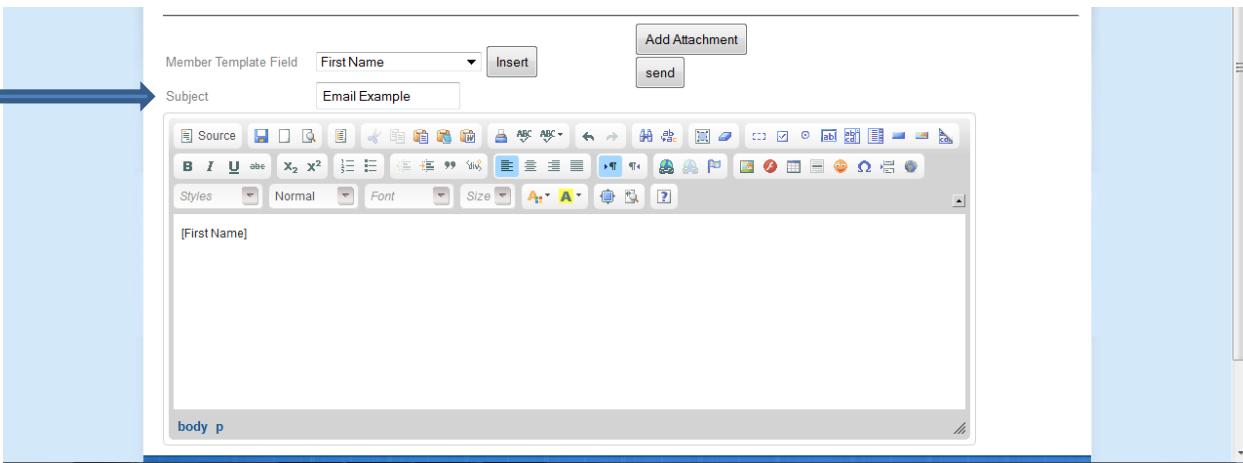
## PERSONALIZING MESSAGES

If you wish to personalize the message you may do so with the “Member Template Field”. Simply select the field, then press “Insert”. The field name will appear in the text editor. When the message is sent it will insert the information from the member’s profile into the message that they receive. (See next two screen shots.)



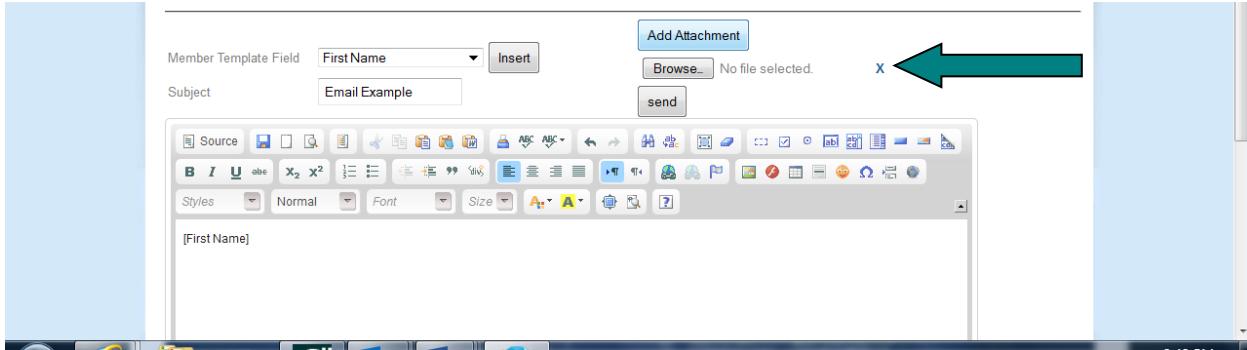
## SUBJECT

Messages sent from the Membership Registry should always include a “Subject”.

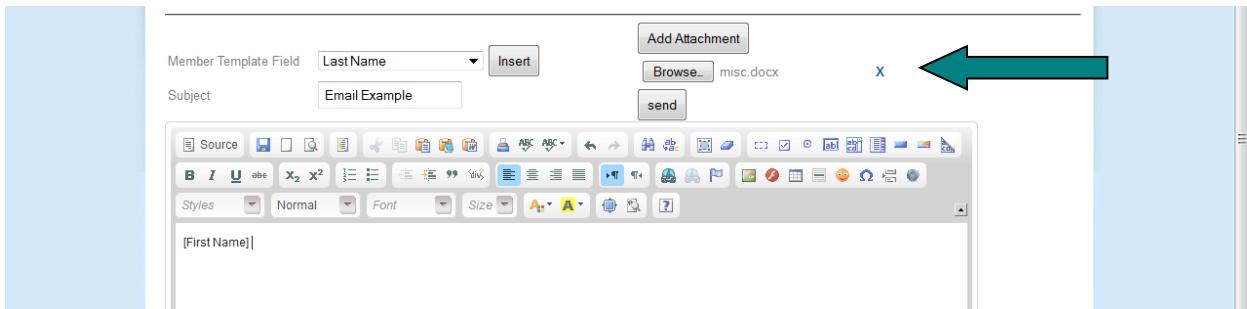


## ATTACHMENTS

To send an attachment, click the “Add Attachment” button. This will generate a field and a “Browse” button. When you click on the “Browse” button you will be able to access any documents available through your computer.



Once you have selected the file(s) you wish to attach the name of the file will appear on the screen next to the “Browse” button.



## SEND

Once you have completed the text of your message select the “Send” button.

