Membership Registry Local Presidents' Usage Guide





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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) or by phone 902-477-5621, 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. Ideally, all site updates would 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.

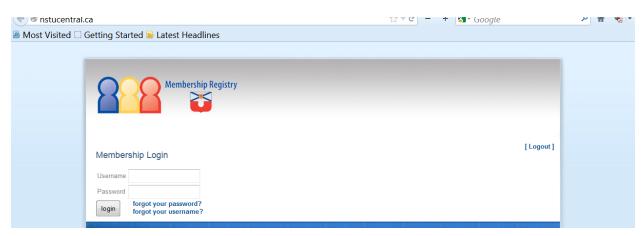
This Guide also provides instructions for updating your Local Executive list and searching and sending emails to members of your Local from within the Membership Registry.

SITE MANAGEMENT INSTRUCTIONS - NSTU PRESIDENTS

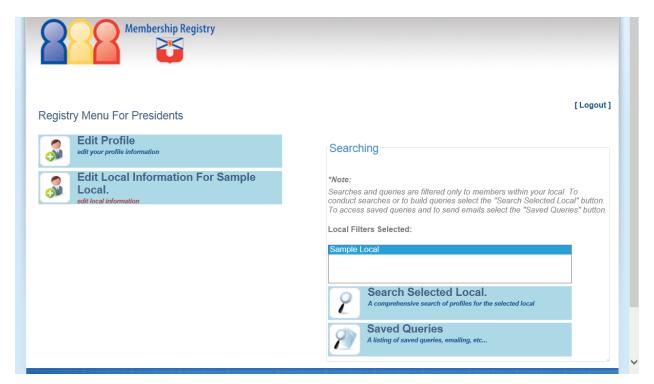
Proceed to the NSTU website (<u>www.nstu.ca</u>) and access your personal profile in the NSTU Membership Registry.

Access to the Membership Registry is available by clicking on the icon () located at the top of 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 Local President, you will be able to access your personal profile, information on your Local or search and email within your Local.

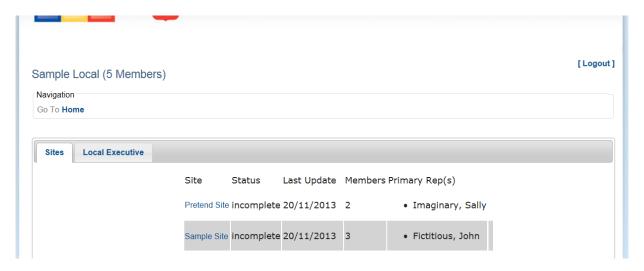


EDIT LOCAL INFORMATION

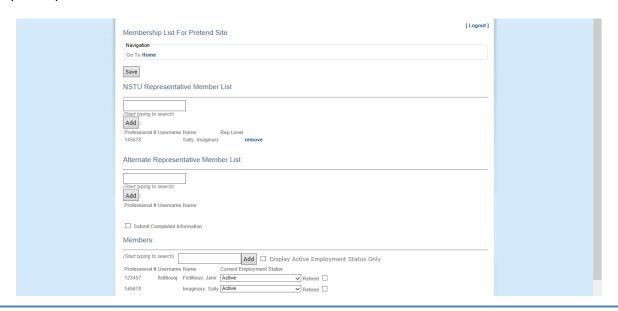
If you click on this button, the next screen that appears will have the name and the number of members in the Local displayed at the top of the page.

SITE TABLE

There are two tabs available on this page. The first tab "Sites" displays a table listing all the sites in the Local (displayed alphabetically). The second column in the site table displays whether or not updates have been completed and submitted. (This column will be reset by administration after the numbers have been pulled every December and March.) The "Last Updated" column will display the last date an update was made to the site list. The "Members" column displays the number of members at the site and the last column displays those members who are identified as "primary" reps for the site.



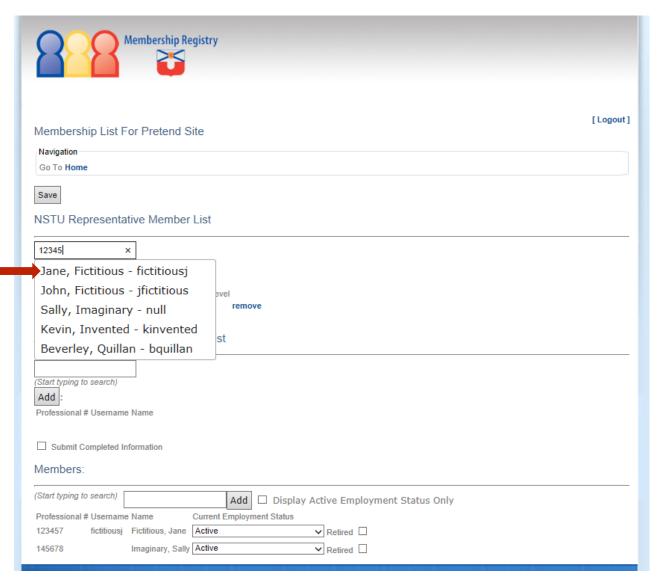
If you click on the name of the site, a new screen will appear where you will be able to assign reps or update the site list.

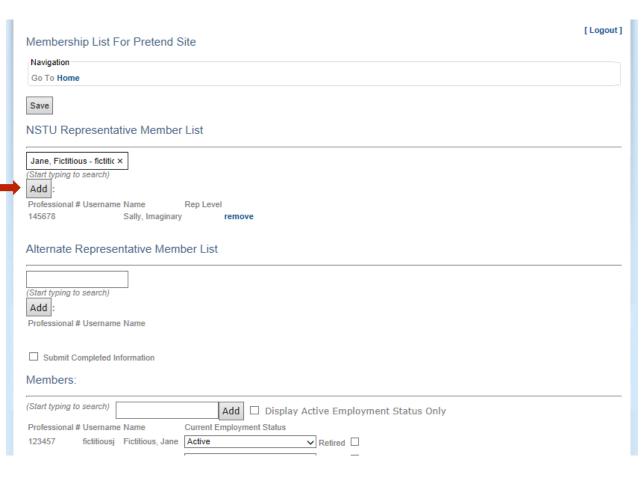


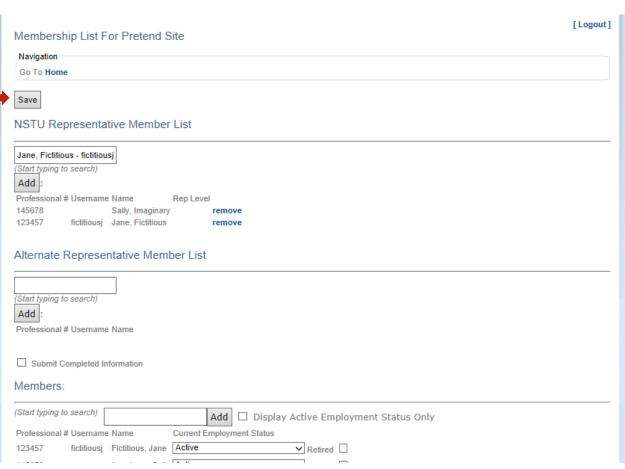
ASSIGNING REPS

It is important to note that NSTU Reps do not have the ability to self-identify on their profile. The responsibility to ensure the accuracy of NSTU rep assignments lies with Local Presidents.

At the top of the site screen you will be able to either assign reps to the site, or if a member is no longer the rep, remove them. (Note: Removing them as a rep does not remove them from the site list.) To add a member as a primary rep, simply type their Professional or NSCC employee number in the field in the "NSTU Representative Member List" section. Once the name appears, click on the name and then press "Add". Once the name appears on the list, press "Save". The same method applies when assigning or removing NSTU reps in the "Alternate Representative Member List" section. (Note: If the name is not holding after you save, please ensure that the member you are assigning as rep has been attached to a site.) See the next three screenshots.



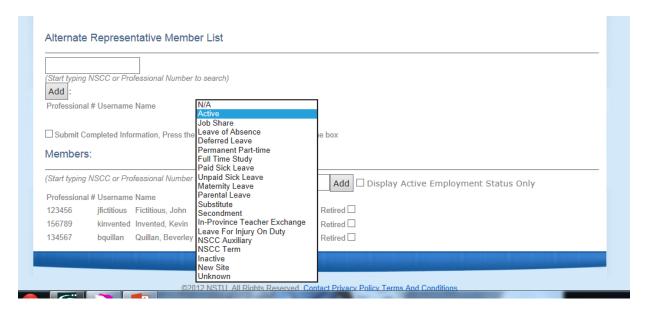




UPDATING A SITE LIST

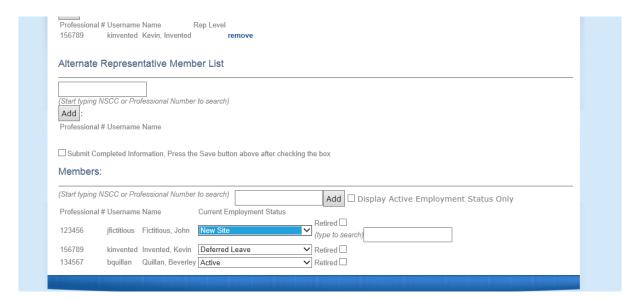
Employment Status

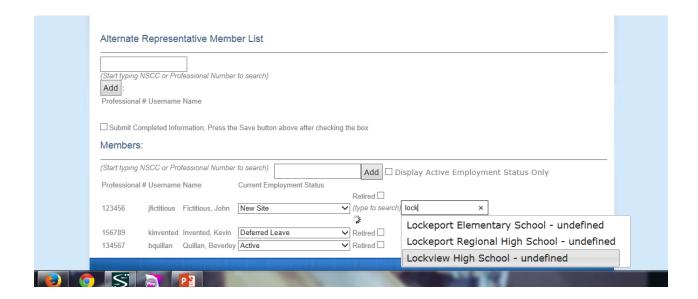
If a member on the list is no longer at the site, and you know the reason why, you should click on "Employment Status" and select the reason. If the member has retired please check the "Retired" box. If you are uncertain of the reason they are no longer at the site you could select "Unknown" from the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

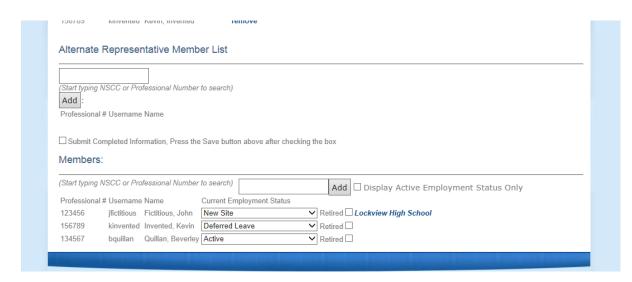


Employment Status – New Site

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.)







Once you select "Save" the member will be moved to the site you indicated and will appear on that site list.

Member Missing from Site - in the Registry

If a member is missing from the site enter their professional or NSCC employee 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. (In the case of NSCC Employee numbers the Registry may provide more than one choice if the number you are inputting is part of another Employee number – for example NSCC #329 is within #5329 or #83296). 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

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Member Missing from Site - NOT in the Registry

If the member is NOT in the Membership Registry 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.")

SAVING AND SUBMITTING

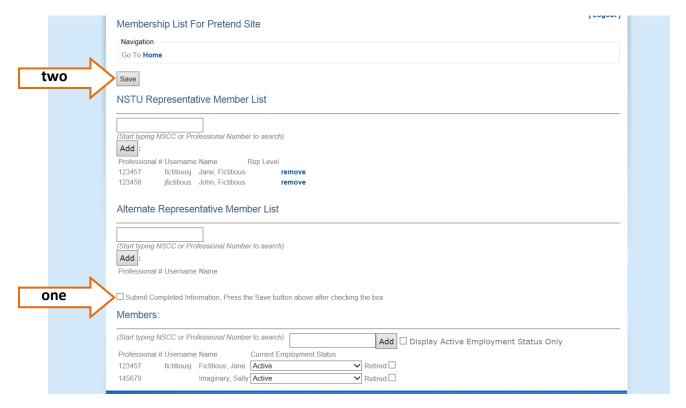
Saving Changes

In order to save any changes, you must click the "Save" button at the top of the page. Once this button has been clicked, the 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" (arrow one) then press "Save" (arrow two).

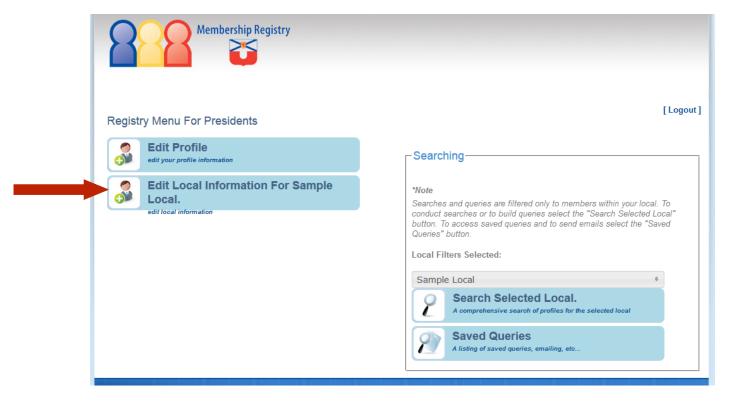
Note: Additional changes may still be made after both these steps.



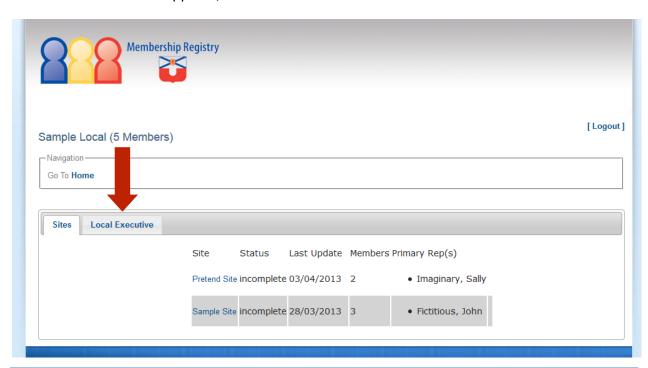
LOCAL EXECUTIVE LIST

Local Presidents have the ability to update the Local Executive List within the Membership Registry.

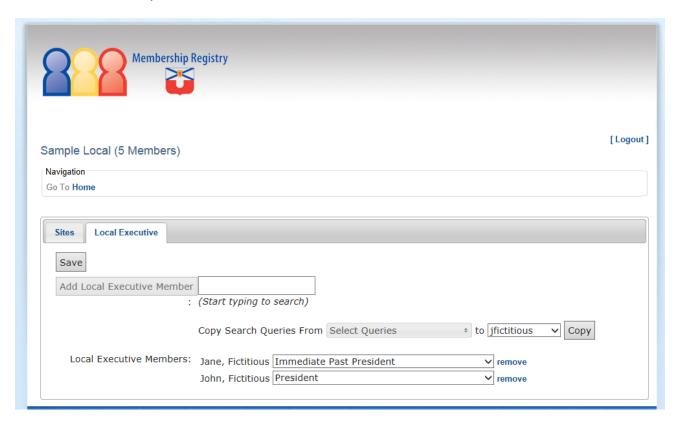
Upon logging in to your profile you will be presented with the homepage below. Click on the "Edit Local Information For . . ." button.



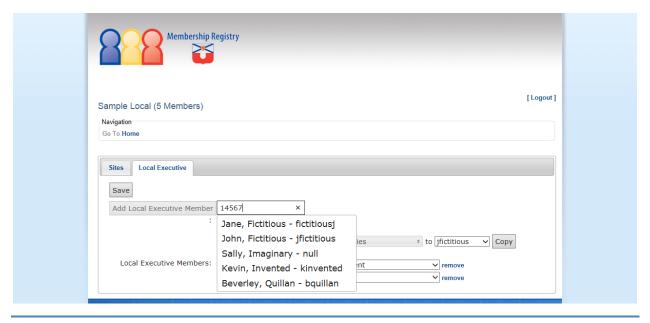
Once the screen below appears, click on the "Local Executive" tab:



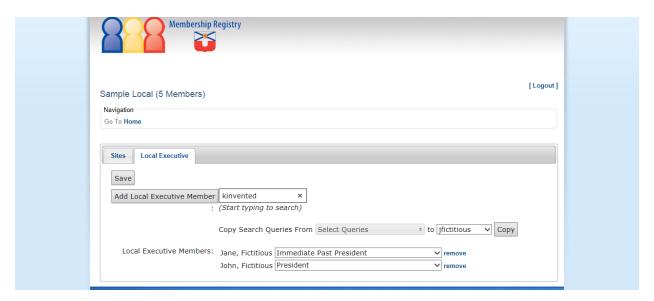
The next screen will display the members who are identified, within the Registry, as holding office on the Executive for your Local.



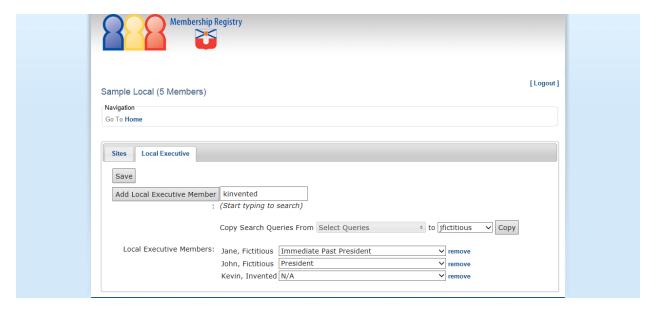
To add a member to your Local Executive, start typing their professional number or NSCC employee number into the "Add Local Executive Member" field. The system will present you with a list of names which will narrow down to a single name once all the digits have been input. (In the case of NSCC Employee numbers the Registry may provide more than one choice if the number you are inputting is part of another Employee number – for example NSCC #329 is within #5329 or #83296). When you see the name to be input, select it. The system will input their NSTU username.



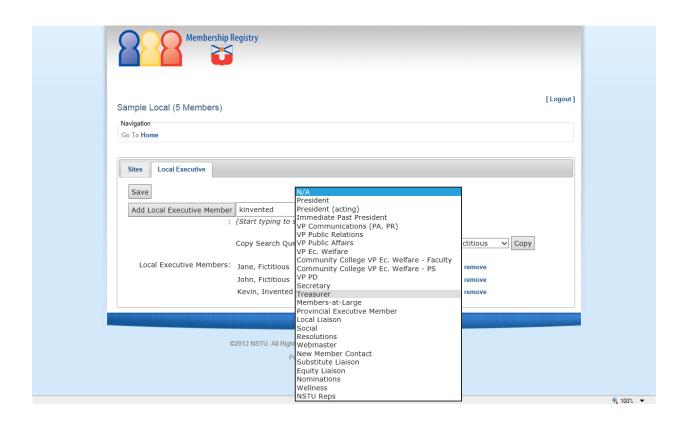
In this section of the Membership Registry, the system will not input a member who does not have an NSTU username. For example in the screen shot above, if you attempt to select Sally Imaginary, who does not have an NSTU username, the system will not accept it. If; however, you select Kevin Invented, it will accept the username, see next screen shot.

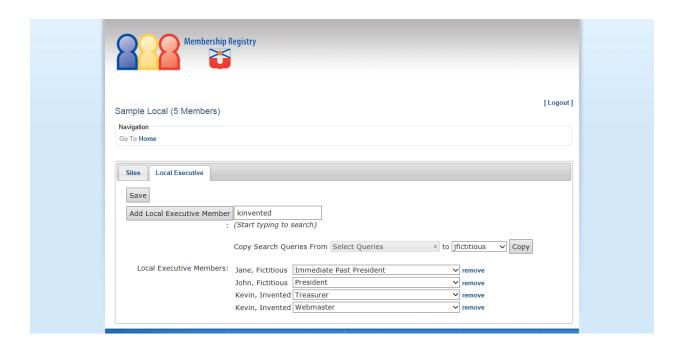


Once the username appears in the field, select the "Add Local Executive Member" button. This will place the individual on your list of Local Executive Members.



Once the member is on the list, select the down arrow on the field next to the name. This will present you with a dropdown list of Local offices. Select the appropriate office from the list.

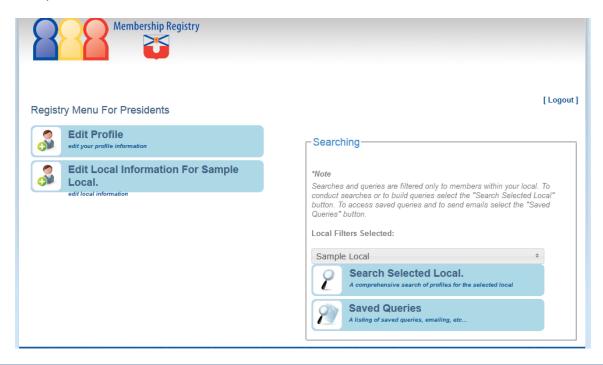




SEARCHING & EMAILING

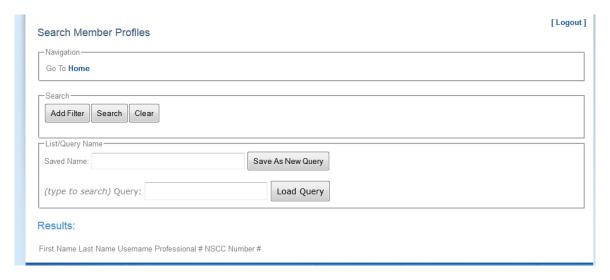
Local Presidents have the ability to perform searches, save queries and email from the Membership Registry.

Upon logging in to your profile you will be presented with a homepage containing access to search options:

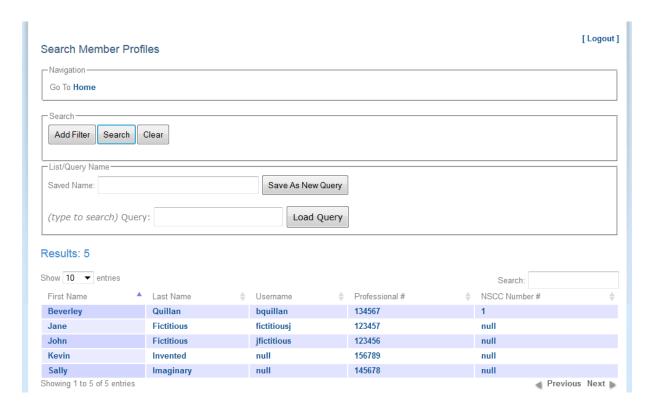


SEARCHING

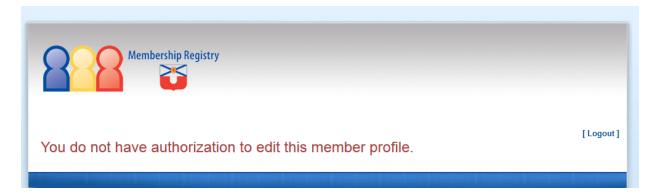
To conduct searches and to build your queries, click on the "Search Selected Local" button. You will then be presented with the following screen:



If you select the "Search" button prior to selecting a filter, it will return all members of your Local.

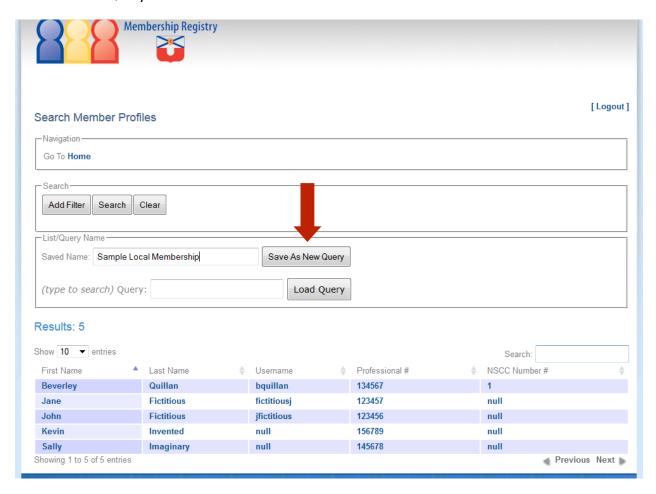


NOTE: You will **NOT** have the ability to access individual profiles for the members on the list. If you click on anything displayed in the columns, other than your own information, you will be presented with the following screen:

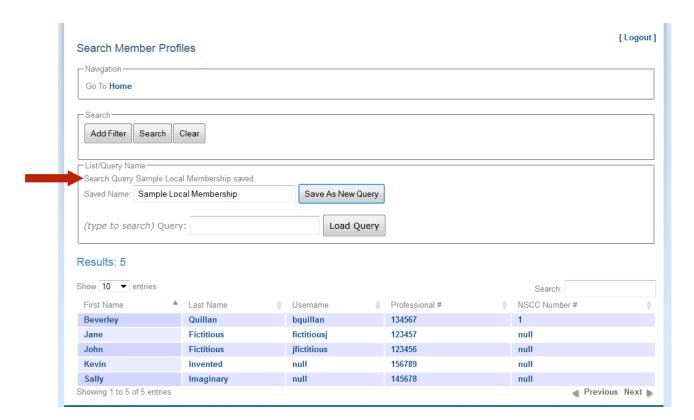


SAVING QUERIES

In order to access this list in the future, simply type in a name for your query and then select the "Save As New Query" button.

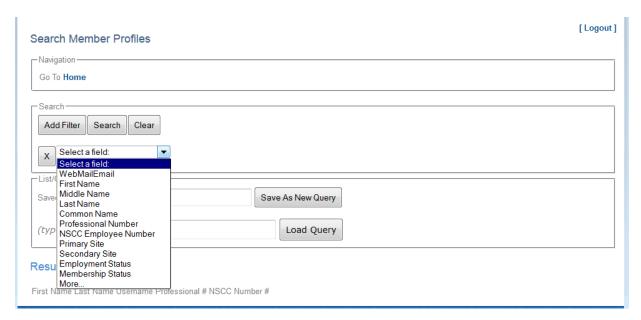


Once you have selected the button, the screen will change to indicate that the Search Query has been saved (see arrow in screen shot below).



FILTERS - PRESET

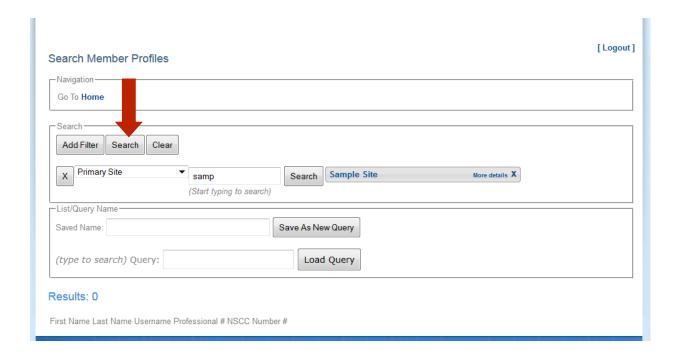
To search your Local based on a particular criteria (for example by site) simply select the "Add Filter" button, this will display a filter field, clicking on the down arrow will provide a list of filters:



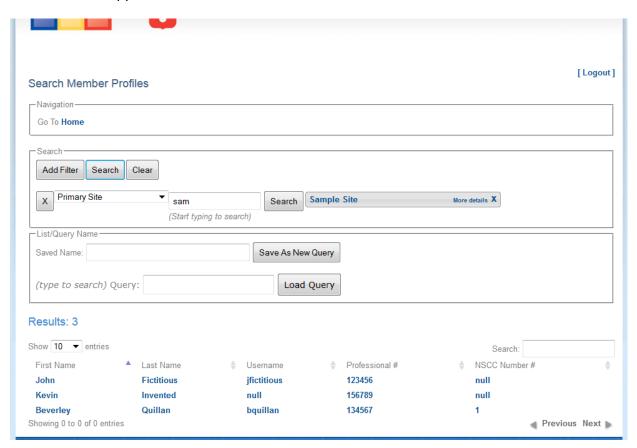
If you scroll down and select "Primary Site" it will present you with a box where you will type the name of the site you wish to find. As you start to type, it will present you with options. These options will narrow down as you continue to type.



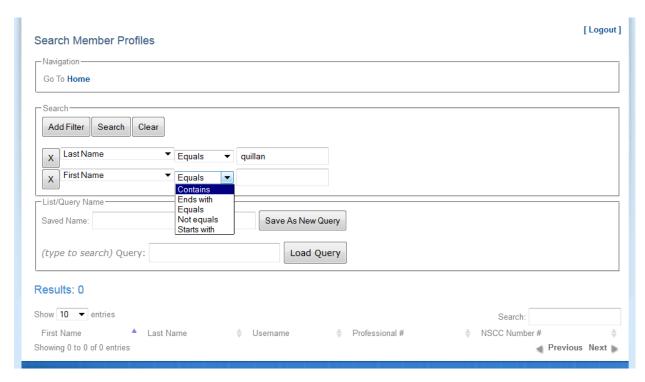
Simply click on the one you require. Once the site has appeared (to the right of the "Search" button) click on the "Search" button above (between the "Add Filter" and "Clear" buttons). See arrow:



The results will appear in a table at the bottom of the screen:

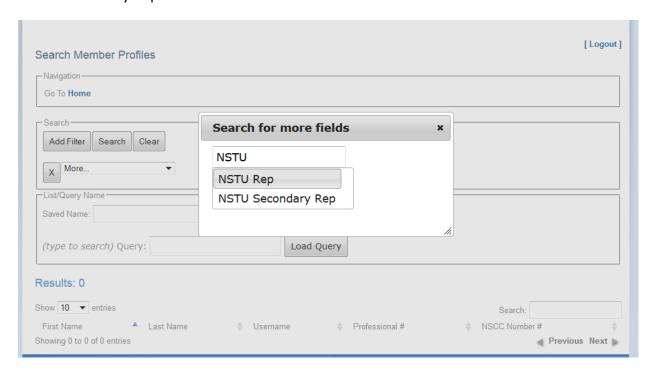


If you wish to search by name, you have the ability to set parameters on your filters:

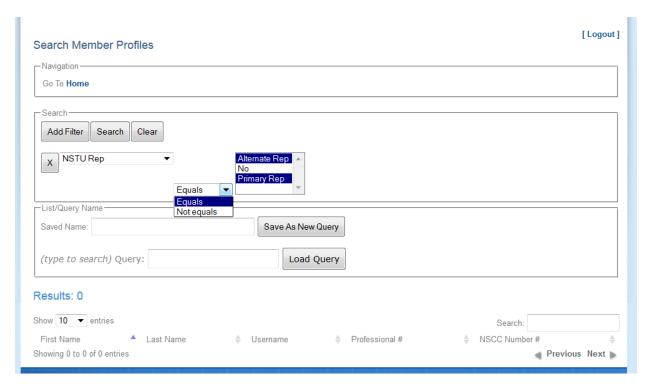


FILTERS - NSTU REPS ("MORE")

To search for NSTU reps, select "more" from the dropdown filter list. A window will appear on the screen. Once you start to type NSTU in the field it will display the choices "NSTU Rep" and "NSTU Secondary Rep".

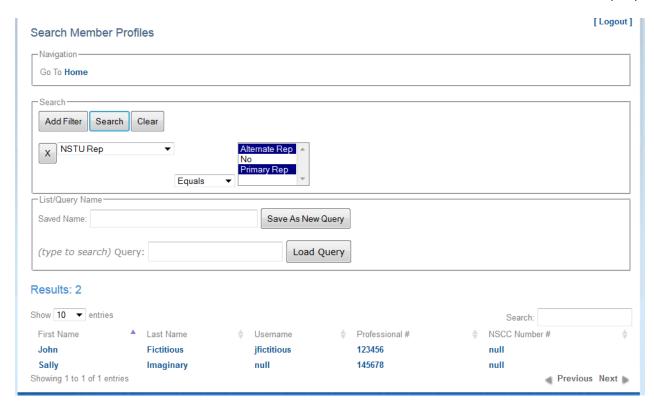


Select "NSTU Rep". This will populate the filter and provide you with filtering options.

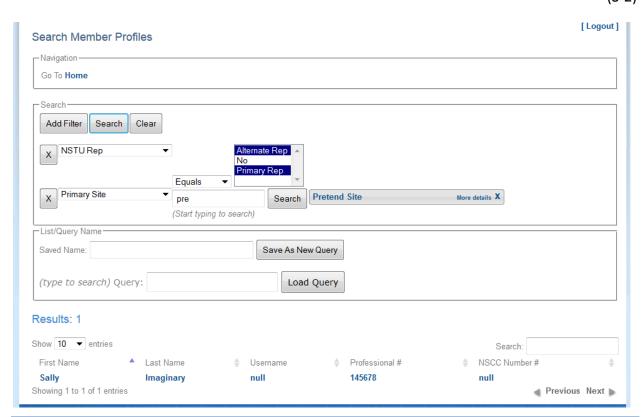


If you wish the search to return all the NSTU reps in your Local, select "Search" (see S-1). If you wish the search to return the NSTU reps located at a specific site, select "Add Filter", input the desired site and then select "Search" (see S-2).

(S-1)



(S-2)



FILTERS - ADDITIONAL INFORMATION

Employment Status

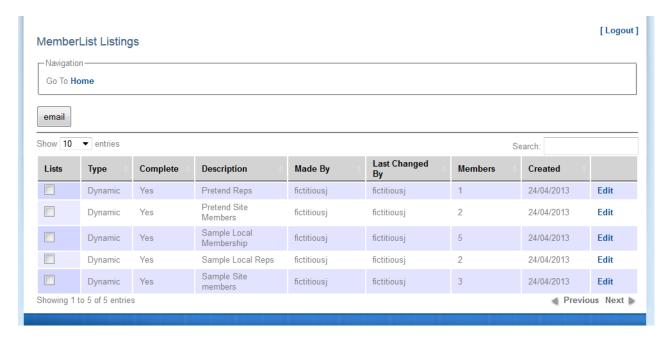
Please be advised that the search engine will only return "Active" members of your Local. Certain categories under "Employment Status" do not fall under this category; therefore, you will not receive any results if you select them. For example; although the category "Substitute" appears under "Employment Status", substitutes are not active members so you will not receive any results if you select that category. You would; however, be able to conduct a search to find all the members of your Local who are on "Deferred" as they continue to hold active membership.

Membership Status

As referenced above, the system will only return "Active" members; therefore, there is no need to utilize this filter.

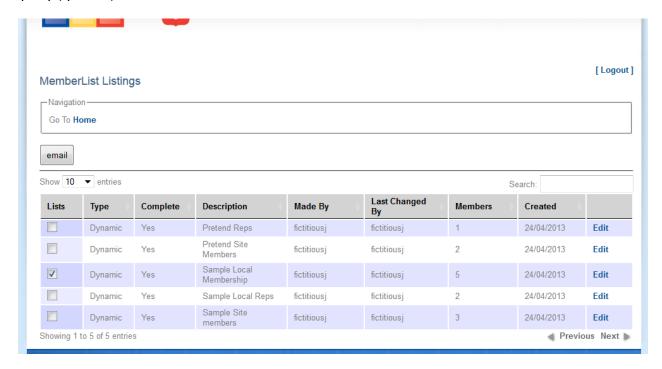
SAVED QUERIES

To view your queries select "Saved Queries" on the Homepage.

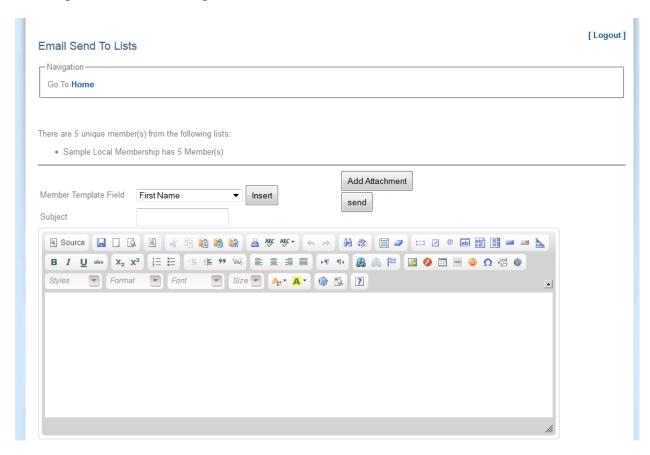


SENDING EMAILS

To send an email, select the box (or boxes) that appear in the "Lists" column next to the desired query (queries).

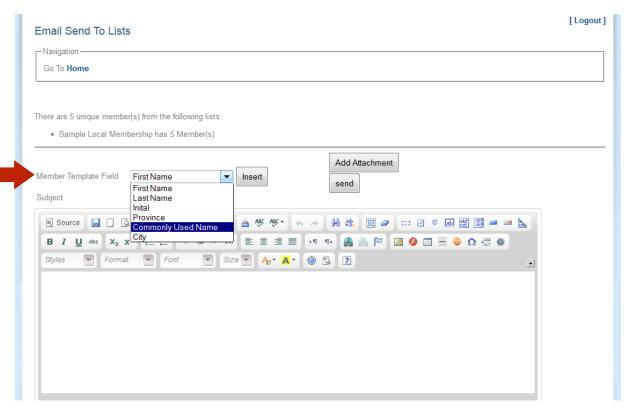


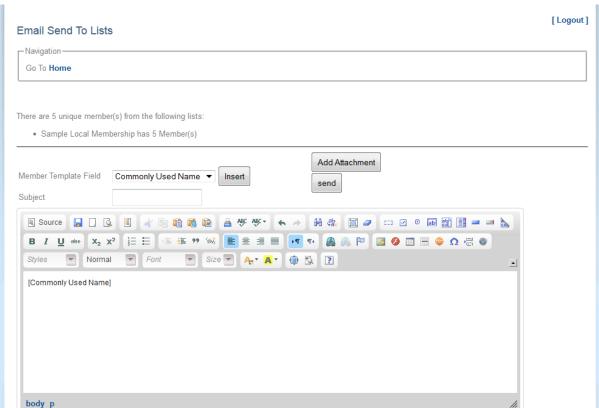
Selecting the "email" button generates the screen below.



Personalizing Messages

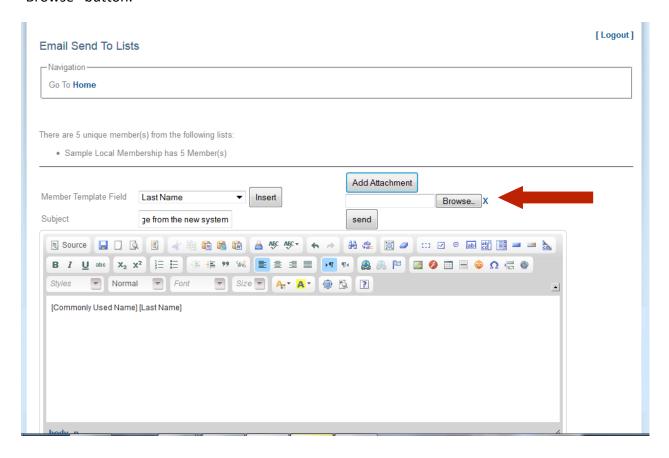
If you wish to personalize the message you may do so with the "Member Template Field". Simply select the field, then press "Insert".





Attachments

To send an attachment, click the "Add Attachment" button. This will generate a field and a "Browse" button.



Confirmations

This system is a component of the Admin system; therefore, email confirmation messages will not be directed to your web account. To ensure you have a copy of any messages you send from the system simply perform a search for yourself and then save the query so it will appear on the "Saved Queries" list. Select that query whenever emailing from the query list.

SITE MANAGEMENT INSTRUCTIONS - NSTU REPRESENTATIVES

Proceed to the NSTU website (<u>www.nstu.ca</u>) and access your personal profile in the NSTU Membership Registry.

Access to the Membership Registry is available by clicking on the icon () located at the top of 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.)

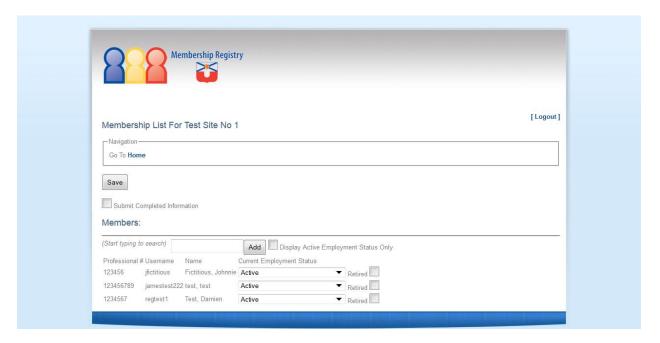


Once you login a homepage will appear. As an NSTU Rep you will be presented with two options. You may either "Edit Profile" (your personal information) or "Edit Site". (**Please Note:** NSTU Reps do not have the ability to self-identify. Local Presidents will identify these assignments.)

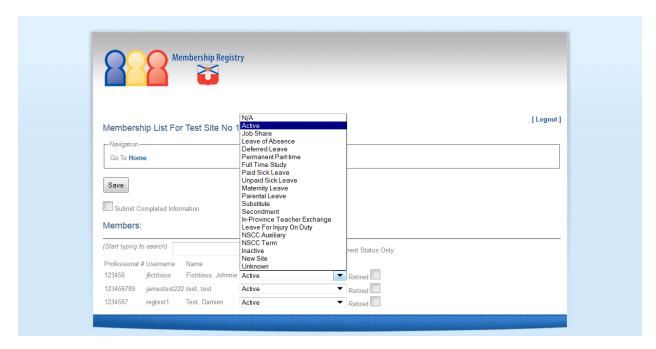


EDIT SITE

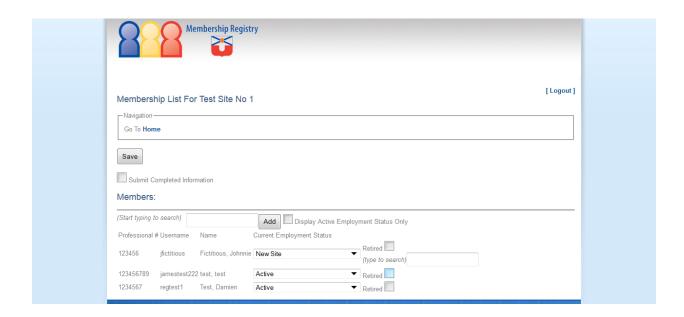
If you click on "Edit Site" you will be presented with the following screen:

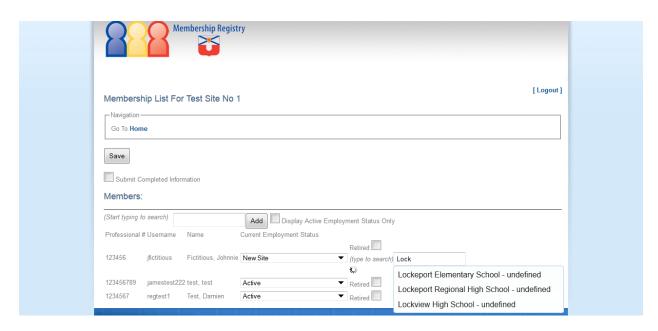


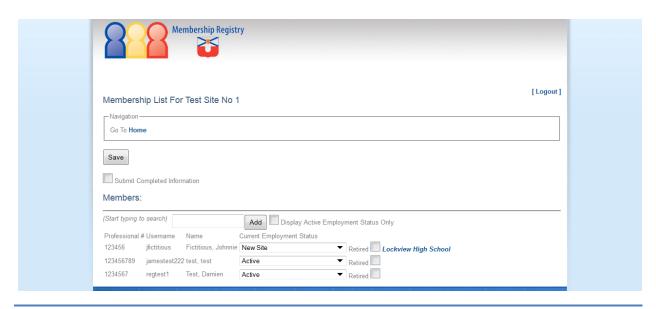
If a member on the list is no longer at the site, and you know the reason why, you should click on "Employment Status" and select the reason. If the member has retired please check the "Retired" box. If you are uncertain of the reason they are no longer at the site you may select "Unknown" from the dropdown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



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.) After you save, the member will be moved to the site you indicated and will appear on that site list.

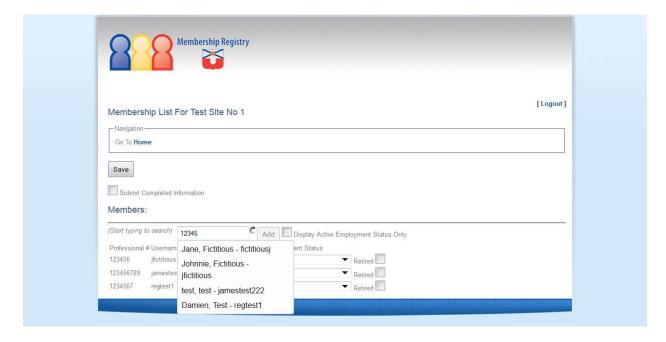


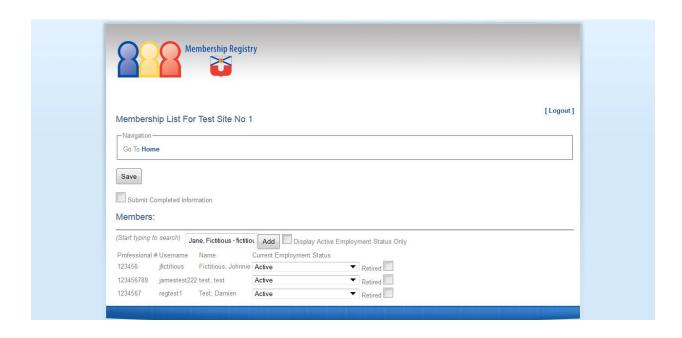


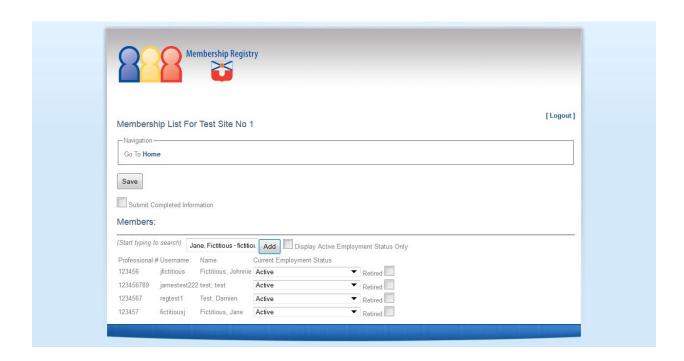


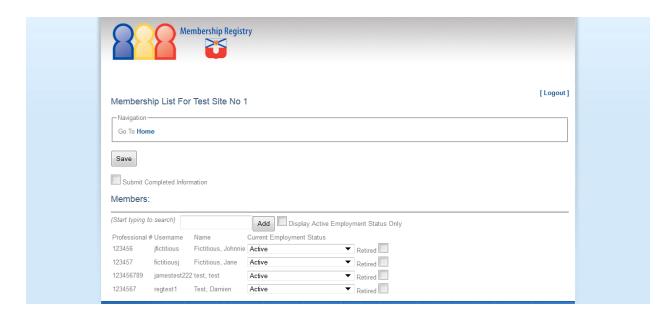
Member Missing from Site - in the Registry

If a member is missing from the site enter their professional or NSCC employee 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. (In the case of NSCC Employee numbers the Registry may provide more than one choice if the number you are inputting is part of another Employee number – for example NSCC #329 is within #5329 or #83296). 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.



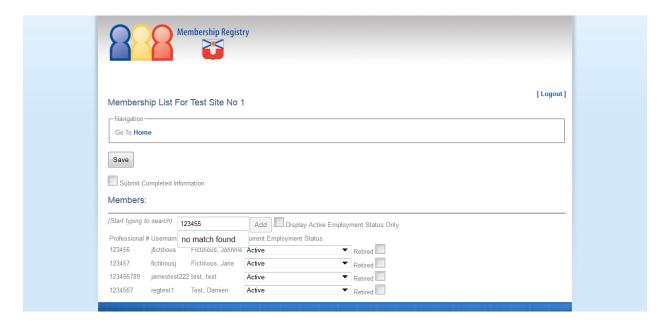






Member Missing from Site – NOT in the Registry

If the member is NOT in the Membership Registry you will receive the message "no match found". If this occurs please ensure that the member completes a "Membership Information" form so that we may input their information into the system. Once they have been entered they will automatically appear on your site list. **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.")



Saving and Submitting

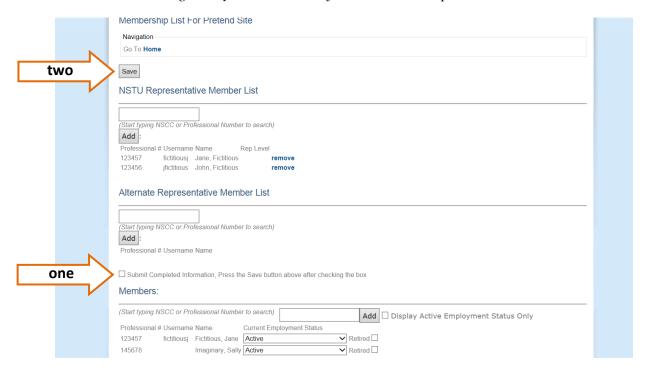
Saving Changes

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" (arrow one) then press "Save" (arrow two).

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



FIRST TIME USERS - PERSONAL PROFILE ACCESS INSTRUCTIONS

- 1) Proceed to the NSTU website (www.nstu.ca). Access to the Membership Registry is available by clicking on the icon (available by clicking on the icon (<a href="www.nstu.ca"
- 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://nstu.ca/default.asp?mn=1.56.299) to the page containing activation information. Please read the information on the page carefully before activating your account.