

# User Manual

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## 1. Logging In

To use the membership system, you need to go to the membership administration page <http://srp.org.uk/membership-administration/> . If you want to try things out, then there is a copy of the system at <http://sandbox.srp.org.uk/membership-administration/> . This sandbox site works with a copy of the database so it is safe to do whatever you like: it will not affect the real membership database at all.

To use either of these sites, you need to log in. If you are not already logged in, when you go to the page, you will get a message "Please login to use this page". To login, click **OK**, scroll up and click the **Login** link at the top right of the page.

Click this and enter your username or email and password. After a pause you should see the page with a row of tabs and an editing area, like this. The exact appearance depends on what you can do..



The **Edit** tab is for editing data online, and is used for updating information about members, affiliated organisations, honorary positions and other roles.

The **Applications** tab is for managing online membership applications and renewals

The **Magazine** tab is for updating magazine subscriptions and the newsletter mailing list.

The **Reports** tab allows you to generate various reports from the database, including spreadsheets for making gift aid claims, summary statistics and the membership list.

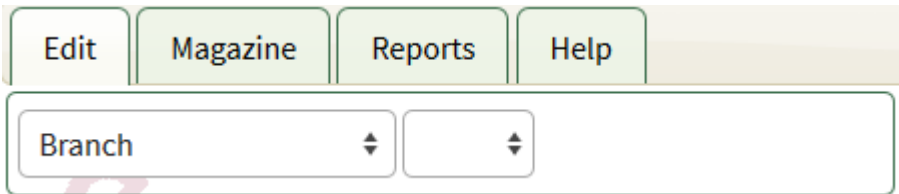
Each of these tabs is described in one of the following sections.

The **Users** tab opens the Membership Capabilities page in a new browser tab. That has its own help page.

The **Help** tab contains links to this User Manuals.

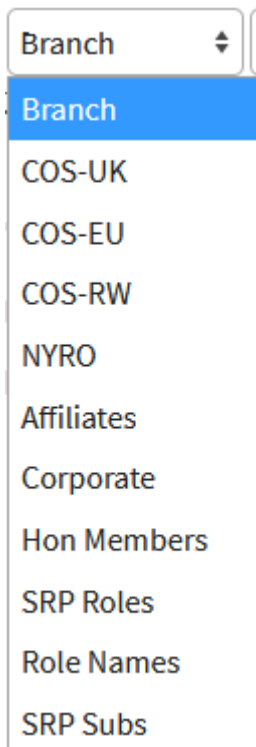
## 2. The Edit Tab

The edit tab is for updating the membership records. Initially it looks like this



The screenshot shows a navigation bar with four buttons: 'Edit', 'Magazine', 'Reports', and 'Help'. Below the buttons is a dropdown menu with 'Branch' selected and another empty dropdown box to its right.

Click the drop down box on the left to get a list of what you can edit:



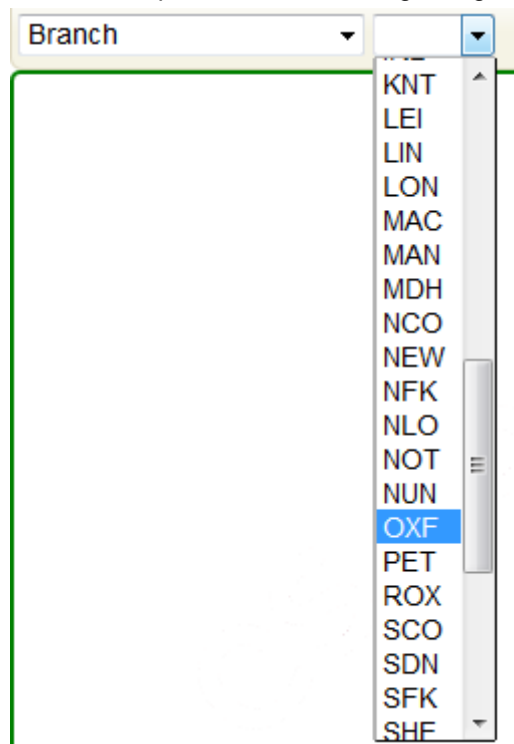
The screenshot shows a dropdown menu with 'Branch' selected. The list of items includes: Branch, COS-UK, COS-EU, COS-RW, NYRO, Affiliates, Corporate, Hon Members, SRP Roles, Role Names, and SRP Subs.

There may be fewer items in this list, depending on what you personally are able to edit. All editing behaves in roughly the same way, although there are small differences between the different choices. Editing a branch is typical, so I will describe that process, and then in later subsections describe only the differences for other choices.

### 3. Editing a Branch

#### General

Click the drop down box on the right to get a list of branches you can edit.



When you click the selected branch, the screen will contain something like this:

Branch ▾
ABE ▾
2020-2021 ▾
Save

Get spreadsheet

	SUBS CATEGORIES					SRP	ALL PAYMENTS		SUBS PAYMENTS		DONATIONS			SRP Total	Branch Total
	L	F	H	S	A		SRP	Branch Total	SRP	Branch Total	NYRO	WBF	Central		
SRP	£0.00	£23.50	£35.00	£17.00	£0.00	Previous	£47.00	£47.00	£47.00	£47.00					
Branch															
Total															

No	Title	First	Surname	Cur	Stat	Sub Date	R	Sub SRP	Sub Branch	NYRO	WBF	Central	Branch	Address

#### Controls

To the right of the branch there is a drop down box showing the current financial year. This allows you to look at information from earlier years, and towards the end of the year to edit information about the following year. The membership secretary can also use this drop down to make corrections to information for earlier years.

The Get spreadsheet button lets you download a spreadsheet of all the information shown in the table. This spreadsheet can also be used to create renewal forms for the following year – see the [Creating Membership Renewal Forms](#) section,

#### Header

At the top there are two tables. The first shows the current subscription rates for the different classes of membership. The second shows any payments that have been made (or should have been made) this year so far.

The subscriptions table shows the standard subscriptions for your branch, the subscriptions to Central SRP and the total payable by each class of member. The grey boxes are calculated automatically. The white boxes, containing the branch element of the subscriptions, are blank when you first start a

new membership year. You can leave them blank if you wish. If you fill them in then they will be saved and used to set the initial branch subscription for each member (see below).

The second table shows the subscriptions and donations recorded so far. The amount you should have sent to SRP is shown in All Payments in the SRP column, The breakdown into subscriptions and donations can be used to fill in your branch accounts return at the end of the year.

## Spreadsheet

Within the green frame, there is a table that looks much like a spreadsheet. If it overflows the frame, there are scroll bars within the frame so you can scroll it horizontally and vertically. You can also resize any column by hovering the mouse in the header row between columns until it changes to a double arrow and holding down the left button (or touching the screen) shows a double vertical bar,

No	Title	First	Surname	Cur	Stat	Sub Date	R	Sub SRP	Sub Branch	NYRO	WBF	Central	Concerto	Branch	Ad
x 12765		John	Adams	<input checked="" type="checkbox"/>	F	11/07/2015	<input type="checkbox"/>	£23.50	£21.50						1,
x 10131		Helga	Bogisch-Francis	<input checked="" type="checkbox"/>	F	21/11/2014	<input type="checkbox"/>	£23.50	£21.50						6
x 10132		Alex	Brooks	<input type="checkbox"/>	(F)		<input type="checkbox"/>								23

and then dragging it left or right.

The table shows current and past members of the branch. In the third row, Alex Brooks has not yet re-joined so her membership status last year is shown in parentheses. In the first row, John Adams has already re-joined this year so the **Cur** box is ticked, his membership status F, the subscription date and his SRP and branch subscriptions are shown. The **R** box is not ticked because he paid a full, not reduced, subscription. He has not made any donations, so the columns for NYRO, WBF, Central, Concerto and Branch donations are blank. The remaining columns list all the personal details and branch roles, if any.

Phone	Email	G	C	T	Qual	N	Branch role
0118 946 3928	rep matsrebbur@sky.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Secretary
07866 429066	alex.s.brooks@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

The text in the table is almost all grey: this indicates that it is unchanged from the values saved in the database (of course, since we haven't done anything yet).

To make changes to the database, you edit the table and then click **Save**. While you are editing the table, no changes are made in the database, so don't worry about making mistakes – you can undo them or simply give up and start again.

When working on the spreadsheet, each item is formatted to show what is going to happen:

grey, normal text	an unchanged item
black, normal text	an item being added to the database
black, bold	an <b>item being changed</b> in the database the <del>old value</del> is shown struck through underneath
black border	a <span style="border: 1px solid black; padding: 2px;">checkbox</span> whose value is being changed the old value is shown as 1 (ticked) or 0(unticked) below
grey background	an <span style="background-color: #cccccc;">item being ignored</span> the <del>old value</del> is shown in grey strikethrough underneath
blue italic	an <i>item whose value is calculated by the system</i>
strikethrough	an <del>item that is going to be deleted</del>
orange, grey background	an <span style="background-color: #ffcc99;">item that is being ignored</span> because it needs confirmation
orange border	a <span style="border: 1px solid orange; padding: 2px;">checkbox</span> that is being ignored because it needs confirmation (and also the confirmation checkbox itself if it has not been ticked).
red	an <b>item in error</b>
pale yellow background	the <span style="background-color: #ffffcc;">row currently being worked on</span>

## To Renew a Subscription

All you have to do to renew a subscription is to click the **Cur** box.

	SUBS CATEGORIES					Previous	ALL PAYMENTS		
	L	F	H	S	A		SRP	Branch	Total
SRP	£0.00	£23.50	£35.00	£17.00	£0.00	£483.00	£439.00	£922.00	
Branch	£21.50	£21.50	£30.00	£6.00	£21.50				
Total	£21.50	£45.00	£65.00	£23.00	£21.50				

	No	Title	First	Surname	Cur	Stat	Sub Date	R	Sub SRP	Sub Branch	NY
x	12765		John	Adams	<input checked="" type="checkbox"/>	F	11/07/2015	<input type="checkbox"/>	£23.50	£21.50	
x	10131		Helga	Bogisch-Francis	<input checked="" type="checkbox"/>	F	21/11/2014	<input type="checkbox"/>	£23.50	£21.50	
↶	10132		Alex	Brooks	<input checked="" type="checkbox"/>	F	11/7/2017	<input type="checkbox"/>	£23.50	£21.50	

By default, the membership status is set to what it was last year. However, you can change it just by typing a different status into the **Stat** field. The possible values are:

- L: an Honorary Life member of the SRP (but see below for households with life members).
- F: individual membership
- H or h: household membership – all members should live at the same address. Please enter H for the person actually paying the subscription, and h for all other members. There should be exactly one H entry for each household.
- If the main person is a life member, enter LH rather than H. However, always enter h for all other members, even if they are themselves life members.
- S: student membership – for those who qualify for the student or youth rate
- A: Associate member – someone paying their central SRP subscription to another branch. If you know the main branch, add its 3 letter code after the A, eg AOXF for a full member of Oxford who is an associate of your branch

The date of the subscription is set to today's date, but again you can change that if it was received some time ago. The Central SRP subscription is entered automatically, and shown in blue to indicate that it is system-generated and can't be changed. In this example the branch element of the subscription is also entered automatically, based on the figure in the table at the top. However, you are free to change this figure if the member paid a non-standard subscription for some reason. If the standard branch subscriptions have not been entered, then the member's branch subscription is initially blank. You can enter a figure by hand if you wish, but it is entirely at the discretion of the branch and not obligatory.

If the member gave donations, enter them in the appropriate boxes.

Whenever you make a change to a line in the table, the **x** at the beginning of the line changes to the backward arrow ↶ that you see in the first line. Clicking that allows you to undo all the changes you have made to the line.

## To Change a Person's Details

Simply type the new details in the relevant field, or click the relevant checkbox. New text will appear in bold and the old value is shown struck through below.

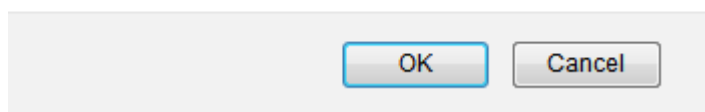
No	Title	First
↶ 10028	<b>Mrs</b> <del>Miss</del>	Clare
10021		

When entering telephone numbers, you can give one or two numbers. If you enter two, separate them by a comma. Each number can contain spaces if you wish. UK numbers should start with zero; overseas numbers should start with "+" and the country code.

You can only change details such as name or address if the person has a current non-associate subscription to your branch. You can of course change the branch role of anyone, since that is a matter for your branch alone. If a person has more than one role, separate them by commas.

If you try to change or remove an existing subscription, you will be prompted to confirm the change:

You seem to be trying to change an existing subscriptions  
If you really intend to do this, click OK.  
If this was a mistake, click Cancel.



### Gift Aid

The gift aid column must be completed with a two-letter code. The first letter is Y if gift aid should be claimed on this year's subscription, and N if not. The second letter describes the Gift Aid Declaration:

- Y The Society already holds a Gift Aid Declaration for the member
- P You are providing a new Gift Aid Declaration
- W You will provide a new Gift Aid Declaration
- N The member is not eligible for Gift Aid
- C There is an existing declaration, but it should be cancelled.

For existing members the entry is normally YY or NN. NY is valid, and means that the member doesn't wish to us to claim Gift Aid this year, but the declaration remains in force

For new members who are eligible for gift aid (or existing members who become eligible) enter YP. YW can be used if you haven't yet received the declaration: you will need to edit the entry when you do receive it.

Only use NC if the member will definitely not claim gift aid in future.

NP and NW are unlikely but allowed,

If you enter YP or NP, then a small button labelled **U** appears to the right of the entry, indicating that you need to upload a scan or picture of the gift aid declaration. Click this button, then browse to select the file containing the scan. Click **OK** when done.

### To Add a New Member

Go to the bottom of the table, where you will see an empty line with a **+** on the left. Start typing the person's surname into the **Surname** box. After you have typed a few letters you will see a list of people in the database whose names start with what you have typed.



Each person's branch is shown, in parentheses if they don't have a current subscription. If the new member is one of them, click that name. If not, click the (new) entry at the top of the list. In either case, a new line is added to the table with the surname you have chosen. If you clicked an existing person, all their details are filled in. If not, just the surname is filled in. In either case the person is made a current full member, although again you can of course set their membership status to something different. If it is a completely new person, then fill in the rest of their details.

1. Title, first names and surname are obvious.
2. The SRP subscription is filled in automatically. If this is a completely new member joining after 1st January, you can tick the R box to claim a reduced subscription.
3. Branch subscription and donations are the same as when renewing.



4. For UK and ROI addresses, use the four Address columns for the street name, town and so on, and put the postcode in the separate postcode column. For overseas addresses, put the whole address including any ZIP or postal code, and the country, in the four address columns and leave the postcode column blank
5. Phone should include the area code. For UK numbers, start with 0; for overseas numbers, + then country code then number. You can have one or two telephone numbers; if you have two, separate them with a comma.
6. The pN (publish name) column should be ticked if the member has consented to have their name in the printed membership list. The pA, pP and pE fields indicate consent to include their address, phone and email.
7. The check boxes C and T should be checked if the member is interested in consort playing or is a teacher respectively.
8. Qualifications should be any relevant musical qualifications, mainly for teachers.
9. Branch role is selected from a list of allowed roles such as Treasurer. If a member has more than one, separate them by commas.

If it is an existing person, then you can change their details if the existing ones aren't correct.

If you need to change the surname of a newly added person, then type the changes into the surname field, ignoring the list of names that will be offered, and then move on to the next field (or press the tab key). You will be prompted to check that this is really what you intend to do.

What do you want to do?

Do you really want to edit the surname of Richard Evans?  
If so click **Edit Surname**

If you intended to change this to a different person, click **Change Person** then select the person from the list or click **(new)Evanson**

Otherwise, click **Cancel**

**Edit Surname**   **Change Person**   **Cancel**

Evanson      F   20/2/2015      £23.50

Choose **Edit Surname** if this is really what you wanted.

After adding a person, there is a – button at the left of the new row.

-	12034	Mrs	Audrey	Evans	<input checked="" type="checkbox"/>	F	29/3/2015	<input type="checkbox"/>	£23.50
---	-------	-----	--------	-------	-------------------------------------	---	-----------	--------------------------	--------

Clicking this removes the person again.

### To Remove a Member

If a person simply fails to renew, **do not do anything at all**. Their details should remain on the database in case they rejoin or join another branch.

However, if a person dies, then click the **x** on the left of the row. This will prompt to check that you really mean this, and if you go ahead show the person with a strikethrough.

<input checked="" type="checkbox"/>	10032	Dr	Gwilym	Beechey	<input type="checkbox"/>	(F)				184 Mayor's Walk
<input checked="" type="checkbox"/>	10033	Mrs	D I	Bennett	<input type="checkbox"/>	(F)				4 Heath Walk

As with all other changes, you can of course undo this.

## To Save Changes

Once you have made all the changes, click **Save**. Normally, this will show you the new state of the membership and summarise the old and new subscriptions and donations at the top of the table.

	SUBS CATEGORIES						ALL PAYMENTS			SUBS PAYMENTS		
	L	F	H	S	A		SRP	Branch	Total	SRP	Branch	Total
SRP	£0.00	£23.50	£35.00	£17.00	£0.00	Previous	£434.50	£397.50	£832.00	£434.50	£397.50	£832.00
Branch	£21.50	£21.50	£30.00	£6.00	£21.50	New	£23.50	£21.50	£45.00	£23.50	£21.50	£45.00
Total	£21.50	£45.00	£65.00	£23.00	£21.50	Current	£458.00	£419.00	£877.00	£458.00	£419.00	£877.00

No	Title	First	Surname	Cur	Stat	Sub Date	R	Sub SRP	Sub Branch	NYRO	WBF	Central	Concerto
x 12765		John	Adams	<input checked="" type="checkbox"/>	F	11/07/2015	<input type="checkbox"/>	£23.50	£21.50				

However, it may report errors, for example if you have omitted a required field or typed an invalid membership status. In that case, click OK and find the errors, which will be highlighted in red

-		Margaret	Jones	<input checked="" type="checkbox"/>	F	6/10/2014	<input type="checkbox"/>	£27.50					missing
---	--	----------	-------	-------------------------------------	---	-----------	--------------------------	--------	--	--	--	--	---------

If you can't see all the error message, expand the column until the whole message is visible.

Here, for example, the user forgot to type an address for the new member. Correct the errors and click **Save** again.

## Creating Membership Renewal Forms

Sometime before the start of each financial year, it will be possible to select the new financial year in the drop down box above the header. You will then be able to do two things.:

1. You can record the branch subscriptions that you intend to charge in the next financial year.
2. Using the **Get spreadsheet** button a mailmerge you can download a spreadsheet (as a csv file) which you can use to make membership renewal forms for each of this year's members.

Further information about creating membership renewal forms is given in the document [SRP\\_membership\\_application\\_manual](#) available from the [branch administration page](#) of the website.

## **4. Editing COS membership**

Editing COS membership is exactly like editing a branch, except that there is of course no branch subscription and no branch role.

## **5. Editing NYRO membership**

This is a greatly simplified version of editing COS membership: there is no subscription or donation information and no membership status, since NYRO membership is free. Nor is there any personal information apart from the contact details. NYRO members do not appear in the printed membership list.

## 6. Online Membership

### How It Works

Any member can change their details online.

In addition you can choose one or more of the following for your branch::

1. Around the beginning of the membership year, you can send members an email reminder that includes how to renew and details of your subscriptions and payment methods. To do this, you just need to tailor the branch details and wording to go in the emails.
2. If you choose, members can go to <https://srp.org.uk/my-membership> and log on to renew their membership. They and you will get an email about their application. When you receive their subscription, you confirm the application, and all their details are automatically updated. If you choose to allow this, you then need to set up the details of how you want members to pay their subscriptions.
3. If you wish, you can provide a link to an application form for new members. Again, when you receive their subscription, you confirm the application and they are registered as members.

You can choose to allow some or all of these features depending on your particular preferences.

### Getting Started

To send reminder emails, click **Reminders** on the Edit tab.. The first time you do this you will be asked to define your email. At this point you can also choose whether to allow online renewals and applications; if you do, then you need to provide details of how you want members to pay. Once you've done that, clicking **Reminders** shows you a preview of your reminder emails and lets you put in your own wording and choose what information to include. You can send yourself a test reminder, and when satisfied send the reminders and if you wish, save the settings for use in future.

Alternatively, go to the **Applications** tab. You can create and alter your settings there by clicking **Settings**.

### Processing Renewals

The email that you get when a members renews online tells you how they are going to pay. When you receive the payment, go to the **Applications** tab. You will see all pending applications. Click the dropdown on the left, which allows you to view the application.

Action	Id	Date	Type	No	First	Surname	Email	Payment	Status
☰	A10038	28/07/2022	renew	24378	John	Doe	john@anthonyhall.org	£50.00	pending
<div style="border: 1px solid black; padding: 5px; width: fit-content;">           Confirm            Refuse            View         </div>									

If all looks OK then click **Confirm**: this will automatically transfer all the details from the application into the database for you, and send an email to the member, copied to you. Please note that this is **all** you have to do. You do **not** need to (and shouldn't) use edit tab to enter the information yourself.

### Managing Personal Details

Anyone (whether or not your branch uses online renewals) can use the My Membership page to edit their details. Since no payment is involved, you are not involved in this at all, but you will receive an email to inform you that there has been a change.

### Accepting Online Applications

When you choose to allow online membership, the settings page generates a link to the application form for new members. If you want to accept online applications, copy this link and put it into your branch web page.

When the applicant submits the form, you will receive an email just as for renewals, and can confirm the application in exactly the same way. Please do check that the application is really from someone completely new to SRP: this must **not** be used for existing members,

### Current Limitations

Existing members can't move to a different branch online..

Associates and life members can't renew branch subscriptions.

## 7. Editing Affiliated Organisations and Corporate Members

### Using the membership administration Edit tab

This is similar to editing COS members.

	Organisation	Email	Web	Cur	Sub	SRP	No	Title	First	Surname	Address
x	10096 Aberdeen Chamber Recorder Orchestra	Recorder_1@Hotmail.com		<input type="checkbox"/>			10164		Ed	Friday	22 Yule Square

The differences are:

1. There are fields for organisation name, email and website address
2. There is no membership status, date of subscription or donation information.
3. The personal details shown are for the contact person for the organisation. This person may be a member in their own right, or not, but in either case the person has a different membership number from the organisation. Both numbers are shown – the organisation's on the left and the person's in the No column just before the person's title and name. Not all person fields are shown – just the address, phone, email (which may or may not be different from that of the organisation) and publication permissions.

#### To Renew a Subscription

Simply click the **Cur** box for the organisation.

#### To Change the Organisation's Details

Edit the field you want to change. You can only do this when the organisation has a current subscription.

#### To Change the Contact Person's Details

If the organisation has the same contact person but that person has, for example, changed their address then just type the changes in. The changed fields will be shown; note that the person's number is, of course, not changed. If you change the surname then you will be prompted to confirm this as with a new COS member.

chestra	Recorder_1@Hotmail.com		<input checked="" type="checkbox"/>	£47.00	10164		Ed	Friday	22 Christmas Circle
---------	------------------------	--	-------------------------------------	--------	-------	--	----	--------	---------------------

Note that you can't change fields such as gift aid or consort playing that are not shown – if these have changed they must be edited by the person's main branch.

#### To Change the Contact Person

If the organisation has changed to a different contact person, then clear the surname field and start typing the new contact's surname. After a few letters, you will see a list of possible matches. If the new contact person is one of them, click that name, which will fill in that person's details.

@Hotmail.com		<input checked="" type="checkbox"/>	£47.00	12034	Mrs	Audrey	Evans	104 Lincoln Road	Deepin
--------------	--	-------------------------------------	--------	-------	-----	--------	-------	------------------	--------

Note that the number is shown as changed, meaning that the organisation has a different contact person, but the person's details are shown as unchanged. You can if necessary edit the person's details. Again, editing the surname will cause a prompt to check that you really intend to do that, rather than changing the contact person.

If the person is not one of the possibilities shown, click the (new) entry at the top of the list. This will just fill in the surname, leaving you to complete the new person's information

gmail.com		<input checked="" type="checkbox"/>	£47.00	(new)			Evans		
-----------	--	-------------------------------------	--------	-------	--	--	-------	--	--

#### To Add a new Organisation

Go to the bottom of the table, where you will see an empty line with a + on the left. Type the organisation's name, email and website (if there is one) into the boxes. As soon as you leave the name box the row is added to the table

-	Membership Orchestra						<input checked="" type="checkbox"/>	£47.00	
---	----------------------	--	--	--	--	--	-------------------------------------	--------	--

To add the contact person, follow the instructions above for changing the contact person: type their surname into the surname box and choose either an existing person or a new one.

## To Remove an Organisation

If an organisation simply fails to renew their subscription, there is no need to do anything at all. If, however, for some reason you want to remove the organisation straight away then click the **x** in the left hand column. This will remove the organisation, but not the contact person.

	Organisation	Email	Web	Cur	Sub SRP	No	Title	First	Surname
<input type="checkbox"/>	10096 Aberdeen Chamber Recorder Orchestra	Recorder_1@hotmail.com		<input type="checkbox"/>		10164		Ed	Friday

## To Save Changes

As always, nothing is done to the database until you click **Save**. Then the changes are made and the old and new subscriptions are shown.

## Online Affiliation

Online affiliation works in the same way as online membership. A contact can edit the details of their organisation online (in this case you do not receive a notification email).

You can send renewal reminders and a contact can submit a renewal application, which you can deal with in exactly the same way as a personal renewal.

## 8. Editing Honorary Membership

The honorary membership list has an entry for everyone who:

1. Is a president or vice-president of the Society
2. Is an honorary life member of the Society
3. Qualifies, for some reason other than the above, for free membership of the Society. Such qualification is at the discretion of the Membership Secretary.

The list contains the person's details plus two extra pieces of information:

No	Title	First	Surname	P	VP	L	Other	List as	Address	
-	11635	Mrs	Beryl	Allen	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		COS-UK	32 Saxon Rise
-	11636	Dr	John	Allen	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		COS-UK	32 Saxon Rise
-	10718	Mr	Ashley	Allerton	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		COS-UK	37 Pinwood Meadow Drive E
-	12267		Emily	Bannister	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	publicity	COS-UK	55a Ridge Lane

1. The reason for the person being in the list. If the person is a President, Vice President or Life Member, this is shown as a tick in the **P**, **VP** or **L** box. In the case of discretionary status, an explanation is given in the **Other** field.
2. The **List as** field, which determines where the member's details should appear in the Membership list and their magazine subscription. This will be one of the COS branches. It should be filled in for all members. While the person is a member of a branch, including COS, this field is ignored. If they are not a member of any branch, however, their details will not be shown in the membership list unless this field shows one of the COS branches, in which case their details will appear under that COS branch.

### To Add a Person

To make a person an honorary member, add them in the [same way that you would add a person to a COS branch](#), using the row marked + at the bottom of the list. When you have added the person, choose one or more reasons by ticking the **P**, **VP** or **L** box or typing in the **Other** field. If this person should appear in the membership list, regardless of whether they belong to a branch explicitly, then fill in the **List as** field. As you start typing in this field it will show the possible alternatives: choose the one you want.

### To Remove a Person

You will notice that the button on the left of each entry in this table is marked – rather than x. To remove a person from the list of honorary members, click this button. You will be prompted to ask whether you want just to remove the honorary status, or to delete the person completely. Choose which you want to do. If you make a mistake, click the ↶ button at the beginning of the line to restore the person.

### To Save Changes

Click **Save** to make your changes.



## 9. Editing SRP Roles

SRP Roles are used to record visiting conductors and officers of the Society. They are edited in a similar way to honorary members, but with just one column, **Role in SRP**, apart from the personal details.

To add a role to someone already on the list, add a comma at the end of the roles and start typing the new role name: a list of matching roles is shown, from which you should click the one you want.

x	11692	Mrs	Moira	Usher	Visiting Conductor,c
+					Chair
					Committee
					Competition Administrator
					Conductor
					Contact Secretary
					Country & Overseas Secretary

You can add as many roles as you like, and also delete existing roles.

To add a role to a person who does not have any, start typing the person's surname into the Surname field on the last line. If the person is already a member, select them from the list; otherwise select the (new) entry and complete the person's details.

Click **Save** to save your changes.

## 10. Editing Role Names

There is a list of allowed role names in the database. Only these names can be used in the branch role box on the spreadsheet. This helps to ensure consistency in the membership list. If a branch needs a genuinely new role, you can add it by choosing **Edit** and **Role Names**.

This shows the existing role names in alphabetical order. Type the new role name in the last row and click **Save** (or click anywhere else to get a new row if you want to add more than one role), Role names can only contain letters, spaces, '-' or '&', otherwise they will be rejected.

You can also delete an existing role name, if it is not in use, by clicking the **X** at the beginning of the row.

Click **Save** to save your changes.

## 11. Editing SRP Subscriptions

Before the start of each financial year, the membership secretary should edit the subscriptions for the coming year. Once the subscriptions have been entered, branches can create membership renewal forms for their members.

Selecting SRP Subscriptions shows the current year's subscriptions and a column to enter next year's subscriptions, pre-filled with the subscriptions that are currently zero.

Type	Stat	2015-2016	2016-2017
branch	L	£0.00	£0.00
branch	LH	£0.00	£0.00
branch	F	£23.50	
branch	H	£35.00	
branch	h	£0.00	£0.00
branch	S	£17.00	
branch	A	£0.00	£0.00
cosUK	L	£0.00	£0.00
cosUK	LH	£0.00	£0.00
cosUK	F	£23.50	
cosUK	H	£23.50	

The subscriptions are classified by type: branch, COS branches, affiliated orchestras and corporate members; and where relevant by membership status. Fill in the new value in all the blank cells and click **Save**. The new subscriptions are then shown, without the current year's subscriptions. It's possible to correct any mistakes now, or later on up to the beginning of the financial year by editing SRP subscriptions again.

## 12. Magazine

The **Magazine** tab includes functions for managing magazine subscriptions and the newsletter mailing list.

### Magazine

A copy of the Recorder Magazine is sent to each active member (two copies to each active organisation). A member automatically becomes active when they join or renew their subscription. A member who does not renew continues to receive the magazine for a time, but at some point each year all members who have not renewed need to be made inactive. There is a button **Update Inactive Members** to do this.

### Make Mailing List

Changes to members' active or inactive status are not sent to Recorder Music Mail immediately. Instead there is a button **Make Mailing List**. This generates a mailing list for the next edition of the magazine. The mailing list should be downloaded and emailed to RMM.

### Update Inactive Members

You should use this button once a year, shortly before the first magazine issue that should *not* go to members who have not renewed. Clicking the button tells you how many members will be made inactive and you can then go ahead, inspect the list of newly inactive members or cancel the operation. If you choose to inspect the list, then you will have to click the button again and then choose **OK** to carry out the operation. After updating inactive members, you need to **Make Mailing List** to generate the new mailing list.

This operation also removes obsolete data, keeping only information about the previous six membership years.

### Newsletter

#### Update Mailing List

This downloads a spreadsheet of changes to the newsletter mailing list since the last time it was updated.

## 13. Reports

This tab contains sections for

1. Generating Membership Summary statistics
2. Generating the data for the Membership List
3. List Role Holders for each branch
4. List Payments Due, organised by date, for each branch.
5. Managing Gift Aid
6. Check Database to make sure it is consistent and up to date

Only those functions available to the current user are shown.

### Membership Summary

**Generate Membership Summary** produces a spreadsheet giving a summary of the number of members in each branch for each year since the database was established.

### Membership List

#### Summary of the Process

1. Edit any text that needs to change from year to year.
2. Download that data from the database
3. Create the document
4. Proofread it and correct any errors in the database or text files.
5. Repeat steps 3 & 4 until you are satisfied that the content is completely correct
6. Make any final adjustments
7. Create pdf (or whatever needs to be sent to the printer)

Each of these steps is explained in more detail below. To make sense of the details, though, you need to understand the....

#### Membership List Structure

The membership list is made up from three different kinds of information

1. Fixed information that doesn't vary from year to year – the logo, title, objectives, document description and so on. This is all stored in the template MembershipTemplate.dotm
2. Variable information that changes from year to year but isn't stored in the database – text about NYRO, advertisements and so on. Each piece of variable information is stored in a text file such as CorporateText.docx (which contains the advertisements from corporate members)
3. Database information – branch and COS lists, orchestras, corporate members and so on

#### Edit Text

You will need to update the following files each year that the list is produced

**OrchestrasText** to update the information about NYRO, assuming we still want that there.

**CorporateText** needs the current advertisements for each of the corporate members (I assume). We have one more this year.

**PostIndexText** currently contains the material such as the Bravo Bonsor advertisement that follows the index in the printed document.

**OfficersText** is the list of SRP Officers that appears on the inside cover.

#### Download Data

Login to the membership system and on the Reports tab click Generate Membership List Data. This will produce a file called something like SRP14\_List\_2015-02-01.srp. Save this file to your list folder.

#### Create Document

In File Explorer, go to your list folder. Double click MembershipListTemplate.dotm. This will open a new Word document with the skeleton information in. You may get a security warning that macros have been disabled – in that case click Options and choose Enable this content.

In the QAT (top left of the window) you should see an icon representing a book. Click this. After a bit a window will appear, asking you to Open the Saved Membership Data. Choose the file you downloaded in the previous step and click Open. Now you will see a window asking you to wait and showing what stage of processing it is up to. When it finishes, click OK. You can check the document there and then, or save it under any name you choose.

### Proofread Document

Make sure the document contains the information you would expect, and that individual items (for example phone numbers) are correctly printed – for example that names have upper case letters, phone numbers have the correct structure and spacing. Don't at this stage worry about larger scale formatting issues such as pagination of the tables. However, you may want to edit the text files according to the amount of space you have available between tables where they are to appear.

If there are errors in the database, then correct them. You may want to generate new branch spreadsheets to prevent your changes being overwritten if the branch submits an update between the list being generated and the end of the year.

### Make Any Final Adjustments

Only once all the tables are correct, you may need to make some manual changes to the formatting.

1. If a single cell overflows unnecessarily, you may be able to adjust its size to accommodate the text. To adjust a cell on a single line, select the whole cell and drag its left or right boundary.
2. You may want to adjust the page breaks. The program tries to paginate correctly: if a table would have fewer than six members, fit will start on a new page, and if it would leave fewer than three members at the top of a new page, it will break earlier to avoid this. (These numbers can of course be changed if you want, if you would prefer different rules) If the result is not satisfactory, then you will probably want to force a table on to a new page. **Do not** try to do this by inserting a page break – the table won't start in the right place if you do. Instead, put the cursor in the space between this table and the preceding one and change the style (which should be separator) to *sepPage*. If for some reason you want to break within a table, then select everything from the row you want to break before to the end of the table, then set the paragraph format to **Keep with Next**.

Whether or not you make any changes, the page numbers in the contents list may need to be updated. Select the whole contents list (but no more) and press F9 to update them.

Now save the document.

### List Role Holders for each branch

Clicking **List** produces a spreadsheet of the name, eMail and telephone of each branch treasurer. If you want you can list other branch officials by typing the role name such as *Chair* or *Secretary* instead of *Treasurer*. As you start typing you will see a list of possible roles to choose from.

### List Payments Due

Clicking **Get Spreadsheet** generates a spreadsheet containing all the payments due from branches, organised by date. Normally payments for the current year are shown, although you can select a different year if you wish. The spreadsheet allows the treasurer to check that payments received match the payments due, and shows the allocation of each payment between subscriptions and the various different donations. There is an entry for a branch on each day that a relevant update was made to the membership records for that branch. The entry shows the payment due that day and the year to date total for the branch.

### Gift Aid

#### Generating Claims

To generate a claim for Central SRP subscriptions and donations, click the **Central** radio button and choose **(all)** in the drop down list. Then click **Get Spreadsheet**.

To generate a claim for branch subscriptions for a single branch, click the **Branch** radio button and choose the branch from the drop down box. Then click **Get Spreadsheet**.

To generate claims for branch subscriptions for all branches, click the **Branch** radio button and choose **(all)** in the drop down list. Then click **Get Spreadsheet**. This generates a zip file containing a spreadsheet for each branch that has recorded branch subscriptions eligible for gift aid.

## Branch Subscriptions

The spreadsheet is in a text format called csv that can be used with any spreadsheet program. It has an entry for each member who has signed up for gift aid. The entry shows the date and amount of the claim, which is the branch subscription plus any branch donation. For your reference the individual items are shown to the right of the claim itself. If you claim gift aid on less than the full amount of the branch subscription, you will of course have to adjust the amount accordingly.

To complete the gift aid schedule for branch subscriptions, follow these steps:

1. If you have not already done so, download the Gift Aid schedule from <http://www.hmrc.gov.uk/charitiesschedules/giftaid.htm> choosing the correct version for your software – Excell or Libre Office.
2. Open the gift aid schedule and the csv spreadsheet.  
If you are using Open Office, then when you open the csv you should set character set to **Western Europe(Windows-1252/WinLatin1)** and the type of the date column to **Date (DMY)** rather than standard.
3. In the csv, click in cell A2, (the first cell below the header line) then shift+click in the the claim cell in column I of the last row to select all the relevant data in the sheet. Copy this to the clipboard, for example with control+C.
4. In the gift aid schedule, click in the first white cell of the Donations Schedule Table (Item 1 Title).
5. Paste formulas:
  - a. In Excel 2007 or later, in the Home tab, Clipboard group, click the arrow under **Paste** and choose **Formulas (fx)** in 2010 or later).
  - b. In earlier versions of Excel choose **Edit, Paste Special...** and click the **Formulas** radio button and click **OK**.
  - c. In Open Office, choose **Edit, Paste Special....** Uncheck **Paste all**, and check **Text, Numbers, Date & Time** and **Formulae**; uncheck **Comments, Formats** and **Objects**, Click **OK**.
6. To find the earliest donation date for Box 1, go back to the csv file and in cell M1 type the formula **=min(H2:H1000)**. This will display the earliest date. Copy this and paste its value into Box 1. (in Open Office you will have to format K2 as date first, or simply type the value into Box 1 by hand).

If you need advice about general gift aid matters, please contact the Gift Aid Administrator, [giftAid@srp.org.uk](mailto:giftAid@srp.org.uk).

If you need help with the spreadsheet, please contact the web editor, [webedit@srp.org.uk](mailto:webedit@srp.org.uk).

## Central Subscriptions

The spreadsheet for central subscriptions is similar to that for branch subscriptions. It contains the total claim, and a breakdown into subscription and donations. There is also a column for the branch and columns indicating the state of the Gift Aid Declaration. These can be used for sorting the sheet and checking against other records.

## List Waiting Declarations

Clicking this downloads a spreadsheet of all declarations with status *waiting*

## List Paper Declarations Needed

Clicking this downloads a spreadsheet of all declarations with status *paper* that are still needed. It should be used after the **Update Inactive** operation has been run, at which point some of the members with paper declarations will probably have been removed from the database.

## Get Declaration Details

Either type the membership number of the member into the **No** box and press **enter**, or start typing the surname of the member into the **Surname** box and choose the member from the list (this doesn't work with members marked X). The declaration(s) for that member are listed, and if there is a scanned declaration it can be downloaded by clicking **Get Declaration**.

## Check Database

Clicking **Check Database** checks some rules that the database should obey if it is consistent and complete. For each rule it either reports **OK** or it reports **Fail** and gives a table, each row of which shows a case where the rule is broken. These reports are primarily intended for the system maintainer, not for users.

The first rules checked are consistency rules that should always hold – any violation is an error in the software. The final rules are completeness rules that only hold once a complete set of membership records and magazine entries has been processed. Violation of these rules might indicate that the some action is needed by the user.

### Consistency Rules

#### AllScansFound

Every gift aid declaration scan mentioned is actually present

#### NoSurplusScans

Every loaded scan is actually mentioned by a declaration record in the database

#### PersonOrOrg

There is no confusion in the database between people and organisations.

#### OrgNotHon

Only people, not organisations, can be honorary members.

#### XNotHon

Only living people are honorary members

#### HonActive

If an honorary member has a default branch then they are always active (ie receive the magazine) regardless of branch membership.

#### SubMatchesPOrgType

The subscription is of the appropriate type for a person or organisation.

#### SubMatchesHon

If a person's memStatus is L or LH, that person must be an honorary member.

#### OneRealSub

A member can have only one membership in a given year, not counting associate membership.

#### NoTentativeWhenReal

This is a purely technical check on the way that associate membership is handled.

#### hInHousehold

For every member with membership status h there must be a corresponding H or LH member.

#### HouseholdHasMembers

If a person has an H or LH membership, there must be at least one other person with a corresponding h membership.

#### HouseholdsDistinct

No two H members in a year have the same address

#### RolesKnown

All branch and SRP roles are in the list of allowed role names

#### WPLinksValid

Any WordPress User that has sn srpld corresponds to a person in the database with status not X.

### Completeness Checks

#### AssociateHasFull

(When all subscriptions for a year complete)

An associate member must have a real subscription to another branch



