State Chapter Module

December 2022
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Logging into SCM

Go to: **www.ACTEonline.org**  Log into your profile.

![Login Screen](image_url)

At least one State Administrator will be granted access to the State Chapter Module. This must be set up prior to gaining access to the state’s membership information. Contact Dahlia Batres for information.

Open a second tab and go to **https://web.acteonline.org/scm**

![SCM Admin Portal Homepage](image_url)
Chapter-Sponsored Event Dashboards, as well as a list of Chapter Reports are available for viewing your state’s membership information. This list describes each of the reports available.

The Selected Report dropdown menu lists all available reports.
Searching for Individual Records

You can also search for an individual by name or member number. You can also search for individuals by part of their name (i.e. Miller or George). This brings up individual members matching your criteria.

To get more detail on an individual, choose their name. To edit parts of the individual’s profile, choose the pencil in the appropriate section.

Notice the preferred mailing, billing, and shipping is marked as either Main/Home or Work.
State Chapter Module Reports
Current Member Reports

1. Current Members Report (includes the 90-day grace period)
The Current Members report gives you a list of all current members including those in the 90-day grace period. You can quickly see several columns of information (you may need to slide screen). By clicking on the column heading, the data sorts by the column information. The Current Members report can be exported as Excel, CSV, pdf, etc.

2. Current Members (only within 30-day grace period)
The Current Members (only within 30-day grace period) does not list all members but only those in the 30-day grace period (expired within 1-30 days).

3. Current Members (only within 60-day grace period)
The Current Members (only within 60-day grace period) does not list all members but shows those in the 60-day grace period (expired within 1-60 days).

4. Current Members (only within 90-day grace period)
The Current Members (only within 90-day grace period) does not list all members but shows those in the 90-day grace period (expired with 1-90 days).
State Financials

The Financial Roster is listed on the drop-down menu and shows financial transactions with dates.

1. **Financial Roster**

   ![Financial Roster Report](image)

   The Financial Roster report gives you the option of searching for transactions between dates or for a member (by membership number).

   ![Financial Roster Report details](image)

   ![Financial Roster Report details](image)

2. **The State Financial Detail Report**

   This report shows the transactions that make up the ACH deposit.

   ![State Financial Detail Report](image)
Historical Roster

Records can be search by date, name, or member number. If more than one record comes up from search, data can be sorted by clicking on the column title.

Lapsed Members

Anyone in our database that have expired past the 90 grace period window will appear on this list. Search for records by dates or member number. If more than one record comes up from search, data can be sorted by clicking on the column title.
New Member Reports

1. **New Members (within 30 days)**

The New Members report gives you a list of all new members who have joined in the last 30 days. You can quickly see several columns of information (you may need to slide screen). By clicking on the column heading, the data sorts by the column information.

2. **New Members (within 60 days)**

The New Members report gives you a list of all new members who have joined in the last 60 days. This list is inclusive and includes all new members who joined in the past 1-60 days. You can quickly see several columns of information (you may need to slide screen). By clicking on the column heading, the data sorts by the column information.

3. **New Members (within 90 days)**

The New Members report gives you a list of all new members who have joined in the last 90 days. This list is inclusive and includes all new members who joined in the past 1-90 days. You can quickly see several columns of information (you may need to slide screen). By clicking on the column heading, the data sorts by the column information.
Renewal Reports

1. Renewals (within 30 days)

This Renewals report gives a list of all entries that have a transaction date within the past 30 days.

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Transaction Type</th>
<th>Join Date</th>
<th>Paid Through</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/8/2022</td>
<td>DIST</td>
<td>8/1/2016</td>
<td>7/31/2022</td>
</tr>
<tr>
<td>7/20/2022</td>
<td>DIST</td>
<td>7/1/2012</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>8/4/2022</td>
<td>DIST</td>
<td>7/1/2012</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>7/27/2022</td>
<td>DIST</td>
<td>9/1/2008</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>7/25/2022</td>
<td>DIST</td>
<td>7/1/2012</td>
<td>9/30/2023</td>
</tr>
<tr>
<td>7/25/2022</td>
<td>DIST</td>
<td>9/1/2016</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>8/2/2022</td>
<td>DIST</td>
<td>7/1/2017</td>
<td>8/31/2023</td>
</tr>
<tr>
<td>7/12/2022</td>
<td>DIST</td>
<td>7/1/2012</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>7/25/2022</td>
<td>DIST</td>
<td>7/1/2012</td>
<td>6/30/2023</td>
</tr>
</tbody>
</table>

2. Renewals (within 60 days)

This Renewals report gives a list of all entries that have a transaction date within the past 60 days.

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Transaction Type</th>
<th>Join Date</th>
<th>Paid Through</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/8/2022</td>
<td>DIST</td>
<td>8/1/2016</td>
<td>7/31/2022</td>
</tr>
<tr>
<td>6/27/2022</td>
<td>DIST</td>
<td>3/1/2017</td>
<td>5/31/2023</td>
</tr>
<tr>
<td>6/23/2022</td>
<td>DIST</td>
<td>8/1/2016</td>
<td>5/31/2023</td>
</tr>
<tr>
<td>8/4/2022</td>
<td>DIST</td>
<td>7/1/2017</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>7/25/2022</td>
<td>DIST</td>
<td>9/1/2008</td>
<td>9/30/2023</td>
</tr>
<tr>
<td>8/2/2022</td>
<td>DIST</td>
<td>9/1/2016</td>
<td>8/31/2023</td>
</tr>
<tr>
<td>7/5/2022</td>
<td>DIST</td>
<td>8/1/2016</td>
<td>7/31/2023</td>
</tr>
<tr>
<td>7/12/2022</td>
<td>DIST</td>
<td>7/1/2017</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>6/23/2022</td>
<td>DIST</td>
<td>6/1/2022</td>
<td>5/31/2023</td>
</tr>
</tbody>
</table>
3. Renewals (within 90 days)

This Renewals report gives a list of all entries that have a transaction date within the past 90 days.

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Transaction Type</th>
<th>Join Date</th>
<th>Paid Through</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/11/2022</td>
<td>DIST</td>
<td>4/1/2021</td>
<td>3/31/2023</td>
</tr>
<tr>
<td>8/8/2022</td>
<td>DIST</td>
<td>8/1/2016</td>
<td>7/31/2022</td>
</tr>
<tr>
<td>6/27/2022</td>
<td>DIST</td>
<td>3/1/2017</td>
<td>5/31/2023</td>
</tr>
<tr>
<td>6/23/2022</td>
<td>DIST</td>
<td>8/1/2016</td>
<td>5/31/2023</td>
</tr>
<tr>
<td>8/4/2022</td>
<td>DIST</td>
<td>7/1/2017</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>7/25/2022</td>
<td>DIST</td>
<td>9/1/2008</td>
<td>9/30/2023</td>
</tr>
<tr>
<td>8/2/2022</td>
<td>DIST</td>
<td>9/1/2016</td>
<td>8/31/2023</td>
</tr>
<tr>
<td>5/28/2022</td>
<td>DIST</td>
<td>5/1/2021</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>5/27/2022</td>
<td>DIST</td>
<td>2/9/2021</td>
<td>4/30/2023</td>
</tr>
<tr>
<td>5/30/2022</td>
<td>DIST</td>
<td>8/1/2016</td>
<td>5/31/2023</td>
</tr>
<tr>
<td>7/5/2022</td>
<td>DIST</td>
<td>12/3/2020</td>
<td>7/31/2023</td>
</tr>
<tr>
<td>6/29/2022</td>
<td>DIST</td>
<td>6/1/2020</td>
<td>5/31/2023</td>
</tr>
<tr>
<td>5/16/2022</td>
<td>DIST</td>
<td>7/1/2017</td>
<td>5/31/2023</td>
</tr>
<tr>
<td>7/12/2022</td>
<td>DIST</td>
<td>0:00</td>
<td>6/30/2023</td>
</tr>
</tbody>
</table>
Missing Member Information Reports

1. Roster Listing with No Email Address

   This report shows a list of members who have no email address in their member profile. You are also able to search by member number to find one individual record. To sort multiple records from search, click on the column heading.

2. Roster Listing with No Mailing Address

   This report shows a list of members who have no mailing address in their member profile. You are also able to search by member number to find one individual record. To sort multiple records from search, click on the column heading.
Member Event Activity Reports

Chapter-Sponsored Event Dashboards

When ACTE manages registration for a state event, a dashboard is created and accessible through the SCM.

<table>
<thead>
<tr>
<th>Event</th>
<th>Begin Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTE Summer Leadership Conference</td>
<td>08/02/2021</td>
<td>08/03/2021</td>
</tr>
<tr>
<td>CTE Summer Leadership Conference - 2022</td>
<td>08/03/2022</td>
<td>08/05/2022</td>
</tr>
<tr>
<td>Classroom Management Tips and Resources</td>
<td>09/16/2021</td>
<td></td>
</tr>
<tr>
<td>New CTE Teacher Workshop</td>
<td>10/13/2021</td>
<td>10/13/2021</td>
</tr>
<tr>
<td>Michigan Workshop</td>
<td>11/17/2020</td>
<td>11/17/2020</td>
</tr>
</tbody>
</table>

The Dashboard Tab gives you a breakdown of registration types.
The Registrants Tab lists all who registered for the event which includes members and nonmembers.
State Members Who Attended ACTE National Events

The final report on the drop-down menu is the ACTE National Event registrants from your state.

To see list of registrants, choose View Registrants.

This gives you a report of everyone from your state who has registered for the national event including the amount paid, date paid, and all individual details.
Export options

When you have run a report, you can export the information as Word, Excel, PDF, CSV, or XML.

The **Word export** –

The **Excel export** brings up a warning message.

The **PDF export** gives you a non-editable document.

The **CSV export** is the recommended option for exporting reports.

The **XML export** brings up an error.
Spreadsheet Filters, Text Filters, and Sort Functions

To widen a column in a CSV export, double click on the line between the columns (E and F).

![Spreadsheet Columns](image)

By clicking on the top left space, you can quickly highlight the entire spreadsheet. This enables you to choose Filter for all columns and rows of the spreadsheet.

![Spreadsheet Highlight](image)

The Sort function can be used by choosing the column title you want to sort by and then choose ascending or descending.

![Sort Function](image)

To sort by multiple columns, choose the sort option.
Filter function is under the dropdown Data menu.

When the Filter function is on, the Sort option is listed in the Filter drop down menu.

Text filter is an option under the filter function.
**Division Report**

To create a report with certain Divisions, export the total roster to Excel or CSV. Open filter on your report and choose **text filter** on Current Divisions field.

To find members in the Business Division that are also in Work-Based Learning, use the options under Text Filter (And, Or, Contains, Does not Contain, etc.) to pull your specific list of members in ACTE Divisions/Sections column.
Spreadsheet Grouping, Subtotals, and Grand Totals

Financial Roster Reports

This will run a report for all transactions run between dates.

Choose the select all to highlight all rows and columns. Turn on the filter for the report.

At this point, it is important to sort your data by the appropriate field (usually the email field to keep individual’s records together).
From the Data menu, choose outline and then subtotal.

If you didn’t sort before running subtotals, you are able to remove this calculation and redo after sorting by choosing **Remove All** button.
To find totals by individual, choose the following within the Subtotal menu.

This will give you subtotals by individual -
Choosing the #2 in the upper left corner will collapse the details and give you the amount that was paid by each individual.