State Chapter Module

December 2023
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Logging into SCM

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

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 Kelli Diemer for information.

Open a second tab and go to https://web.acteonline.org/scm
State Chapter Module Main Screen

The descriptions of available Chapter Reports are listed on the main screen.

**Chapter Reports**
- **Current Members** - chapter members who are regarded as current active members of ACTE national as of today's date.
- **Financial Roster** - transactions with ACTE for all chapter members.
- **Historical Roster** - chapter members from all time regardless of their current ACTE national membership status.
- **Lapsed Members** - chapter members who have expired and exceeded the go-day grace period.
- **New Members** - chapter members who have joined within the past 30, 60, or 90 days.
- **Renewals** - chapter members who have paid their renewal in the past 30, 60, or 90 days.
- **Roster Listings with No Email Address** - chapter contacts who have no email address on file in the ACTE national database.
- **Roster Listings with No Mailing Address** - chapter contacts who have missing or incomplete address data on the ACTE national database.
- **State Financial Detail Report (ACH)** - Report showing the state's ACH monthly deposit.
- **State members who attended ACTE national events** - shows a list of events that your state chapter members have attended. Click "View Registrants" to view registration details about chapter members who attended the ACTE national event or State Support Event.

To open a report, choose from the dropdown menu for the Selected Report.
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. If the address is missing on the preferred mailing, billing or shipping address, the member will not be receiving mailed correspondence from ACTE.
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

The Financial Roster report gives you the option of searching for transactions between dates or for a member (by membership number). The Financial Roster report shows ALL transactions from a member including those to ACTE.

2. The State Financial Detail Report
   This report shows the transactions that make up the ACH deposit.

Put in the appropriate end of month date to run the State Financial Detail Report (ACH) – NEW! and select Run Report.
The report runs as a pdf but can be exported in a spreadsheet format if needed. This report shows only the amounts paid to the state association and will match the ACH monthly deposit.
Historical Roster

Records can be searched 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 has 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 use the slide bar at the bottom of the window). 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 use the slide bar at the bottom of the window). 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 use the slide bar at the bottom of the window). 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>7/1/2022</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>8/4/2022</td>
<td>DIST</td>
<td>7/1/2022</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>7/1/2022</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>7/1/2022</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>7/25/2022</td>
<td>DIST</td>
<td>7/1/2022</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>8/1/2016</td>
<td>5/31/2023</td>
</tr>
<tr>
<td>6/23/2022</td>
<td>DIST</td>
<td>7/1/2017</td>
<td>5/31/2023</td>
</tr>
<tr>
<td>8/4/2022</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>9/1/2016</td>
<td>8/31/2023</td>
</tr>
<tr>
<td>8/2/2022</td>
<td>DIST</td>
<td>8/1/2016</td>
<td>7/31/2022</td>
</tr>
<tr>
<td>7/5/2022</td>
<td>DIST</td>
<td>12/3/2020</td>
<td>5/31/2023</td>
</tr>
<tr>
<td>6/29/2022</td>
<td>DIST</td>
<td>7/1/2017</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>7/12/2022</td>
<td>DIST</td>
<td>6/1/2022</td>
<td>5/31/2023</td>
</tr>
<tr>
<td>6/23/2022</td>
<td>DIST</td>
<td>0:00</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>7/1/2016</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>5/27/2022</td>
<td>DIST</td>
<td>5/1/2021</td>
<td>6/30/2023</td>
</tr>
<tr>
<td>5/30/2022</td>
<td>DIST</td>
<td>2/9/2021</td>
<td>4/30/2023</td>
</tr>
<tr>
<td>7/5/2022</td>
<td>DIST</td>
<td>8/1/2016</td>
<td>5/31/2023</td>
</tr>
<tr>
<td>6/29/2022</td>
<td>DIST</td>
<td>12/3/2020</td>
<td>7/31/2023</td>
</tr>
<tr>
<td>5/16/2022</td>
<td>DIST</td>
<td>6/1/2020</td>
<td>5/31/2023</td>
</tr>
<tr>
<td>7/12/2022</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.
In some instances, ACTE manages registration for a state event. In those cases a dashboard with event information is created and accessible through the SCM.

<table>
<thead>
<tr>
<th>Event</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTE Summer Leadership Conference</td>
<td>06/02/2021</td>
<td>06/03/2021</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>09/10/2021</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

For ACTE National Events prior to CareerTech VISION 2023, this information is available in the reports State members who attended CTE national events & State non-members who attended ACTE national events.

For ACTE National Events (CareerTech VISION 2023 to current), this information is available in the reports State members who attended ACTE national events (Activity) & State non-members who attended ACTE national events (Activity).

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.

### CareerTech Vision and Expo 2023

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Title</th>
<th>Company</th>
<th>Email</th>
<th>Phone</th>
<th>Registration Date</th>
<th>Total Charges</th>
<th>Total Payment</th>
</tr>
</thead>
</table>

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).

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.

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

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.

<table>
<thead>
<tr>
<th></th>
<th>First Name</th>
<th>Last Name</th>
<th>E-Mail</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Bob</td>
<td>Jones</td>
<td><a href="mailto:BobJones@gmail.com">BobJones@gmail.com</a></td>
<td>Total</td>
<td>$32.50</td>
</tr>
<tr>
<td>2</td>
<td>Nancy</td>
<td>Jones</td>
<td><a href="mailto:NancyJones@gmail.com">NancyJones@gmail.com</a></td>
<td>Total</td>
<td>$130.00</td>
</tr>
<tr>
<td>3</td>
<td>Pete</td>
<td>Jones</td>
<td><a href="mailto:PeteJones@gmail.com">PeteJones@gmail.com</a></td>
<td>Total</td>
<td>$77.50</td>
</tr>
</tbody>
</table>