What is Association Workbench?

Association Workbench is a series of integrated web-based applications that provide associations with scaleable and affordable solutions for their information management requirements.

The core components of this portfolio provide the foundation on which to build complete business solutions. Additional application components can be added at anytime to increase functionality and extend features to satisfy complex business requirements. These components are complimentary to the core components

Contact Manager

- Provides the overall framework for organization, address and contact information, enabling that information to be linked, sorted and reported. Tracks all contact relationships and transactions through one easy to use web-based interface.

Security Manager

- Enables the integrated management of access to all application components through one security view. Ensures the integrity of data through transaction monitoring and auditing based on unique USERID and Password.

Membership Manager

- Record and manage membership-related information.
- Track and manage membership activities including board, committee and chapter information.

Communications Manager

- Consolidate communication activities through one interface.
- Enable email broadcasts based on contact “lists” from contact manager.
- Create and manage discussion forums
- Export data to other applications

Document Manager

- Advanced document management and publishing capabilities.
- Sharing, collaboration and managing relationships between other information elements and documents.
- Support of multiple formats as well as “document databasing”.
- Support for standards, specifications, best practices and related documents

Financial Manager

- Generate online invoice and payment transactions.
- Accept online payments (third-party payment solution).
- Create financial reports

Website Content Manager

- Manage website content from a single web-enabled interface.
- Control the publishing of content through security related “activities”.
- Create multiple “content” sections and publish dynamically.

Event Manager

- Record and manage information about training courses, conferences, and seminars through a single interface.
- Add information about these events and enable the publishing of that information internally or externally via the Internet.

Registration Manager

- Provide for integrated registration capabilities by phone, fax or online.
- Eliminate duplication of data and provide for registration details to be tagged directly to the "master file".
- Enable online payments.

Product and Service Manager

- Enable the management of information related to products and services offered by an association.
- Enable sales online.
- Create an online bookstore.
- Create reports on sales to members and non-members.

A.   Contact Manager

Contact Manager is the core module of your Workbench and has many different functions. The information your store in Contact Manager can be used for many different purposes and is frequently referenced by the other Workbench Modules.

What do I do with the data stored in Contact Manager?

Contact Manager functions as an online, shared address book giving staff access to all or part of your master database of organizations and contacts. With this shared address book, everyone can have access to the same up-to-date information ensuring accuracy and eliminating the need for redundant contact lists being maintained by each staff member.

1. **Registrations** – Using Event and Registration Manager, register contacts or organizations contained in Contact Manager to Events listed in Event Manager.

2. **Communications** – Workbench's Communications Manager uses the data in contact manager to communicate with people. Your contact lists can be used to create faxes, emails, letters and labels.

3. **Security** – Issue security access to a protected area of your website. Security can be granted to any individual contact in Contact Manager as well as in groups based on lists.

How it Works

Before you learn how to do all of the things that Workbench and Contact Manager can do for you, you first need to understand how the system works. Understanding how Contact Manager houses your information is an important part of understand how yiou use the system.

Contact Information – How is it Stored in Contact Manager?

Contact Manager is a relational database – What does this mean? Contact Manager, unlike many other databases like Microsoft Access, only wants to store a piece of information once. This means that each company, location and person should be in Contact Manager only once. Through a unique tagging process, all contacts specific to a particular location are tagged to a single database entry for that location. This eliminates duplication and simplifies the updating process. So, any time you want to add information to the database, the system will prompt you for a keyword to search the database to see if the information is already in the system.

There is a hierarchy to the data contained in Contact Manager that you must understand to ensure you input data correctly.

Your data is divided into 3 main Categories:

- **Organizations** (Org) are entire companies, including all sites (addresses) and personnel (contacts). Organizations represent the top of the data hierarchy. As an example the company General Motors would be an organization.

- **Addresses** are the individual locations, such as offices and plants, of a Company (Organization). They are associated with (or linked to) an Organization. For example, the organization General Motors has many addresses associated with it, including Assembly plants in Detroit and Oshawa, Head Office in Detroit, etc..

- The final level of data is **Contacts**. Contacts are people. For example, the president of General Motors would be associated with the Head Office.

Helpful Hints for Using Contact Manager:

- Try not use your browser (e.g. IE or Netscape) to navigate your Contact Manager (when avoidable). Contact Manager was designed to be navigated using its own standard navigation tools and using your browser to navigate the database will confuse the system and cause unnecessary problems.

- Contact Manager's database search will search database fields for exact matches to the search criteria you provide. To ensure your search finds the results you are looking for, use broad search terms. For example, if you are looking for John Doe, try searching for Doe, rather than John Doe. If John Doe was added as J. A. Doe searching for John Doe would not find the entry, but searching for Doe would.

  From the Advanced Search Screen you can control the specific fields that you wish to search by simply checking the box next to the fields you want to search. Workbench will retain your specific preferred searching preferences.

  If you are searching from the quick search page, Contact Manager searches the following fields automatically:

  - **Organization**
    - Organization Name
    - Keywords

  - **Address**
    - Address Name
    - Street
    - City
    - Province

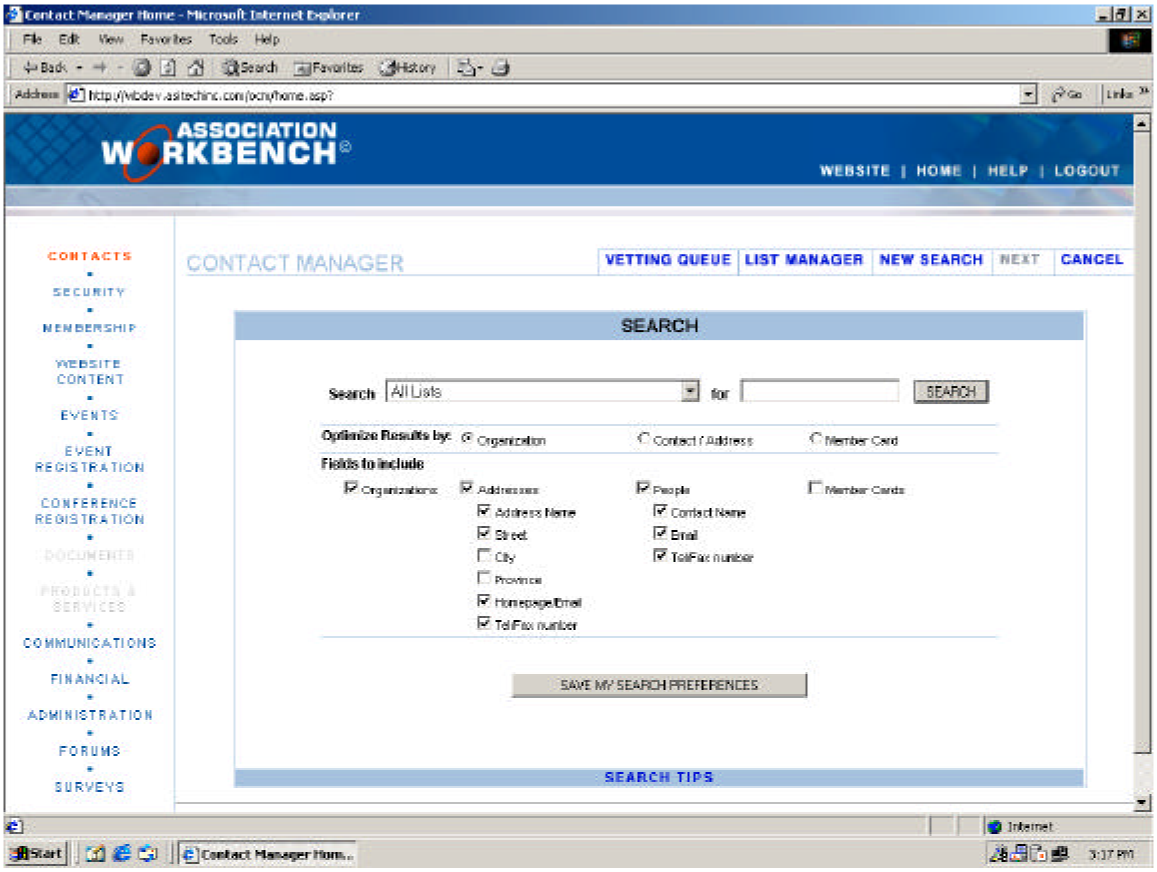
- **Homepage**
  - Email Address
  - Telephone Number
  - Fax Number
- **Contact**
  - Contact Name
  - Telephone Number
  - Fax Number
  - Email Address

- Updating Contact Manager via your workbench is not a linear process; there is more than one way to add or update information. The purpose of this Users Guide is to act as an orientation to the system by providing detailed instructions for the easiest way to add or update information using your workbench. As you become more familiar with the system you will discover new ways of accomplishing the same tasks.

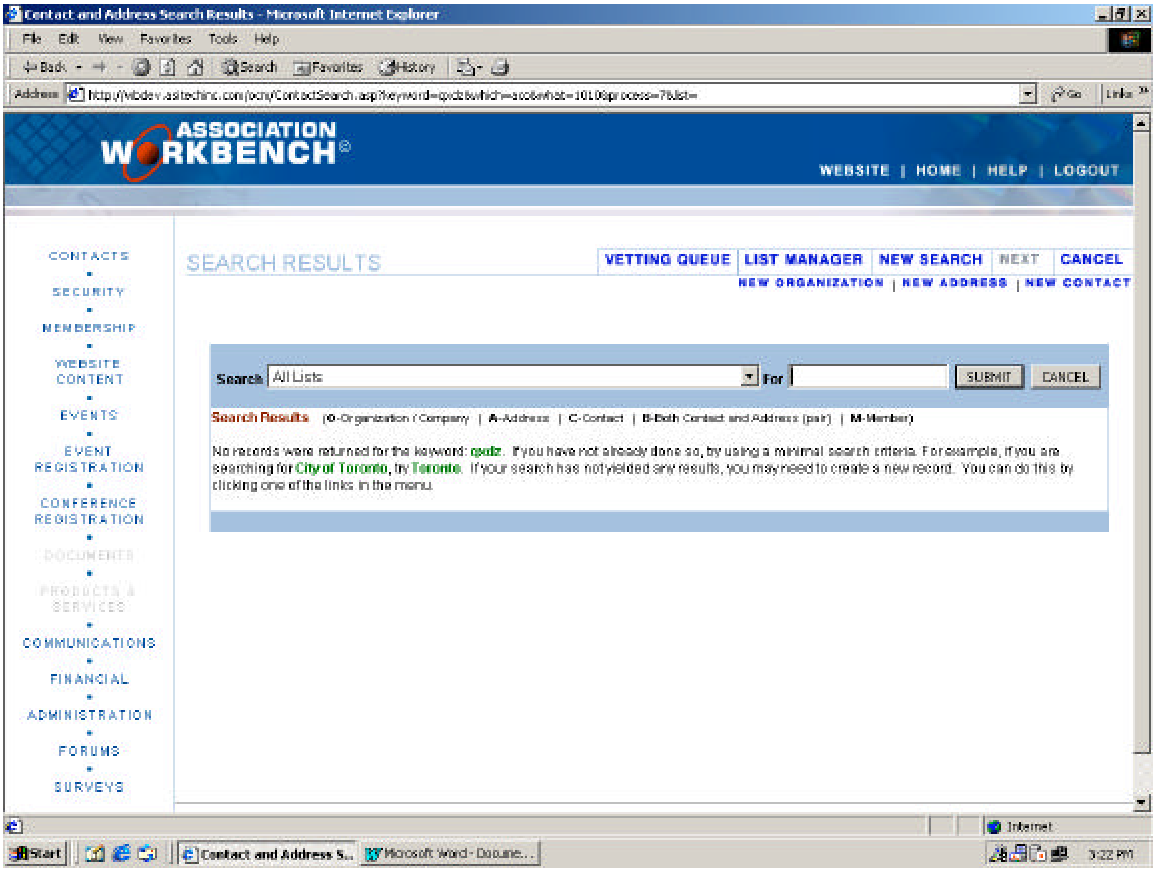
The different views …

Search Screens

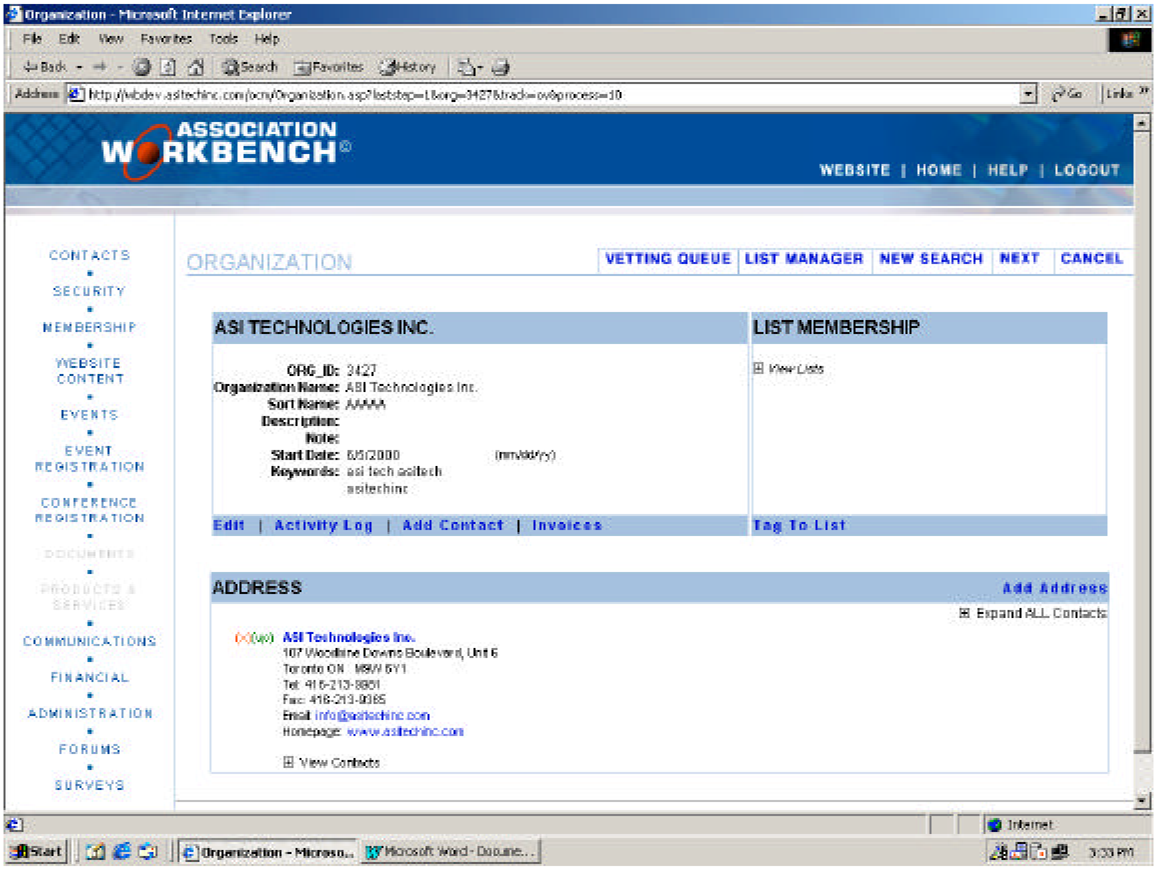
Advanced Search:



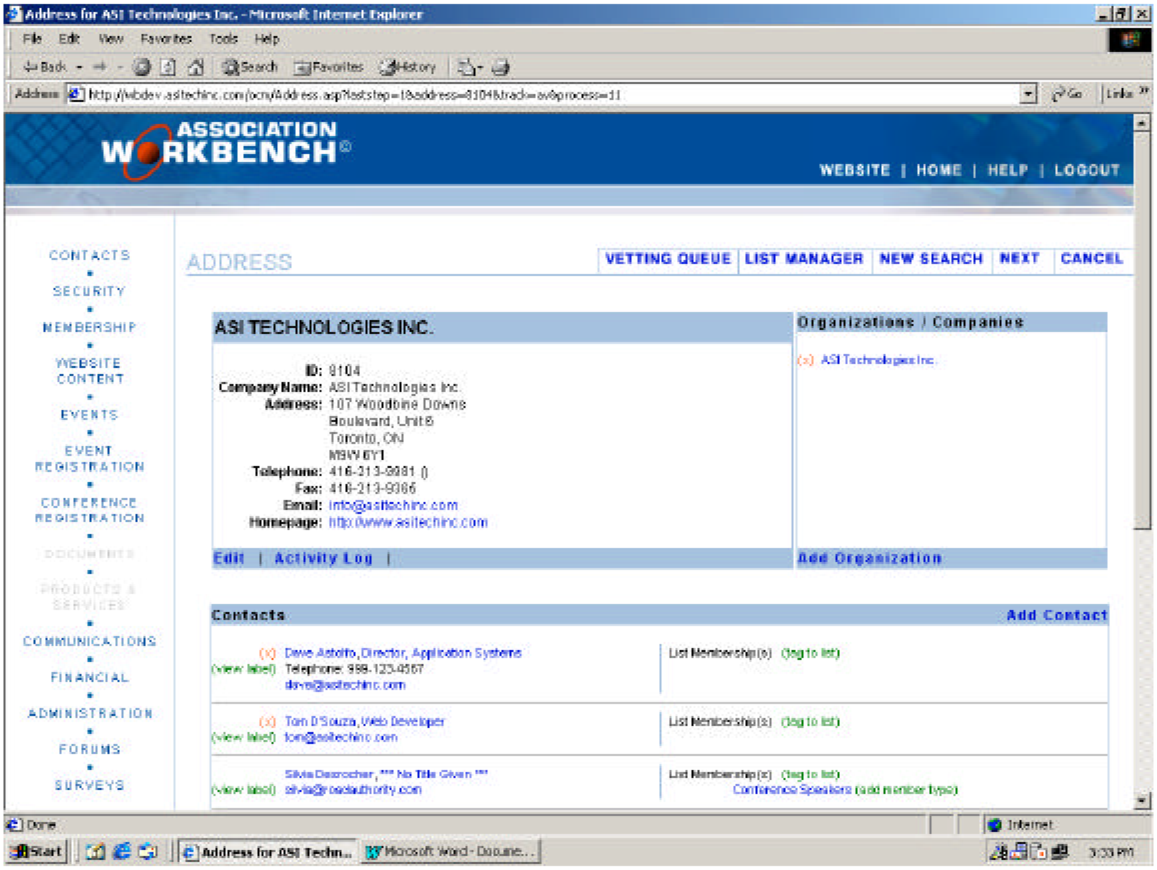
Quick Search:



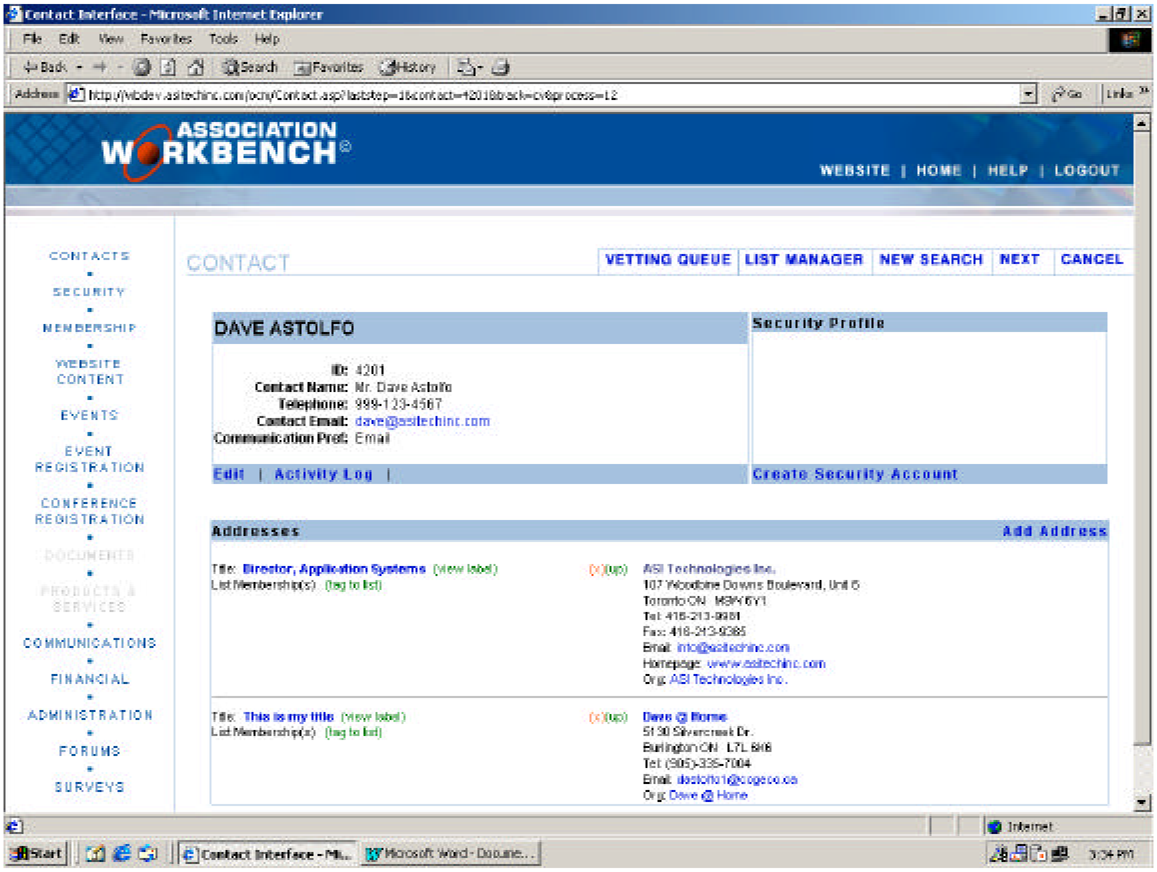
Organization Screen:



Address Screen:



Contact Screen:



Terms and Descriptions

Organization – The Umbrella under which all company locations and contacts and contained. The highest level in the data hierarchy used in Contact Manager.

Address – The individual locations associated with an Organization, such as offices, plants etc.

Contact – Contacts are people. Contacts are tagged to addresses (locations). Any single contact can be tagged to multiple addresses.

List Membership – Contact data can be grouped together for data management and communication purposes. For every list that a contact record is placed on, a list membership is created and attached to the corresponding contact record. By clicking on the list membership you can edit the record contained on the list.

List Membership Type – Allow you to sub-divide lists. For example, A Committee list can be sub-divided by Chairman, Treasurer etc .. A membership list can be divided according to your different membership types.

List Card – Contains the contact record information that is tagged to an individual list. Access a list card through the contact record by clicking on the list name. From the list card you can change the Organization, Address and contact record attached to the list as well as access any fields you have generated specifically for that list.

Label – A quick view of a the contact record, address record and contact title at that address. Designed to give a quick view of the data that would appear on a mailing label.

Activity Log – Allows you to record manual log entries against a contact or organization record. All log entries are date and time stamped and can be categorized by a pre-defined list.

Managing your Data in Contact Manager

1. Adding an Organization

From the **search screen**, type the name of the organization (or part thereof) into the keyword field to search for the organization (Org) you would like to add:

- If Contact Manager finds the organization, then it is already in the database and does not need to be added again. (To edit the organization details, click **EDIT**).

- If Contact Manager does not find the organization (Org) in the database, then you need to add it.

Click the **NEW ORGANIZATION** button located under the Contact Manager Navigation Bar in the top right corner of your screen.

Input the information for the organization. Click the **SUBMIT** button

You have added the organization to the database.

2. ***Adding Addresses***

Find the organization you want to add the address to, by using the Contact Manager Search page.

Once you have found the organization you with to add an address to, click the **ADD ADDRESS** button.

Search for the address you want to add.

- If Contact Manager finds the address, then it is already in the database and does not need to be added again. (To edit the address details, click **EDIT**).

- If Contact Manager does not find the address in the database, then you may add it. Click **NEW ADDRESS** button

Input the address information and click submit. To complete the linking process, Contact Manager will run the original address search. To complete the process, from the search results page, click on the address you have just added. This will link that address to the organization.

3. ***Adding Contacts***

To Add a contact to the database you should start by adding or finding the Organization you wish to add the contact to first. Once you have found the organization, simply click the add contact button, fill in the contact information and select applicable address from the drop-down list.

4. ***Tagging to a List***

From the **Contact** screen, select **(tag to list)** for the contact of your choice.

Select the list that the contact is a member of.

If desired, you can then further sub-divide you list by tagging the contact to a list membership type. To do this, click **add membership type** and select the appropriate member type or click add new to add a new list membership type.

Security Manager

What does it do?

Security Manager allows you to issue and manage a security profile to any of the contacts contained in the Contact Manager database. Security profiles can be granted for the Workbench itself as well as any other website or web-application that is integrated with your Workbench.

How does it work?

Security Manager can be accessed in two different ways, either:

Directly via the Security menu item located on the left side of your Workbench screen.

Or

By accessing a contact record in Contact Manager and clicking on the security profile link located at the top right corner of the Contact record.

Managing Security in Workbench

Steps for Adding a Security Profile

a) Via Contact Manager

1. From the Contact Manager advanced search, search for the contact that you want to grant a security profile.

2. From the Contact Information Screen, click *Create Security Account*.

3. Assign a password

4. Assign the appropriate database record keys (see glossary for definition of keys).

5. Assign the appropriate activities (see glossary for definition of activities)

b) Via Security Manager

1. From the Security Manager homepage, click Add New User

2. Search for the contact that you wish to grant a security profile.

3. Select the appropriate contact.

4. Assign a password

5. Assign the appropriate database record keys (see glossary for definition of keys).

6. Assign the appropriate activities (see glossary for definition of activities)

Terms and Descriptions

Keys – identify which database records a contact is authorized to edit. Typically, these include the user's own contact record and the address (s) that the user's record is tagged to.

Activities – identifies what the user is allowed to do, including the areas and modules of the Workbench and associated websites that they are permitted to access.

Communications Manager

What does it do?

Communications Manager is, in many ways, the most important and frequently used module in Workbench. It allows you to use the data stored in Contact Manager and Membership Manager for the tangible applications associations require. Specifically, Communications Manager allows you to do the following things with your contact data:

- **Mailing Labels**
  Creates labels in Microsoft Word based on your pre-defined label templates.

- **Data Export**
  As much as we have tried to accommodate your application needs within Workbench, there are instances when you will need your Workbench data for use in external programs. Communications Manager allows you to export data from your contact database in comma delimited format (.csv). This allows you to use your contact data in external applications such as:
    - Microsoft Word (manual mail merges)
    - Microsoft Access
    - Microsoft Excel

- **Export to Outlook**
  Similar to the data export feature, Communications Manager will also Export data directly to Microsoft Outlook Contact Folders. This allows you the convenience of having Workbench data available directly via Outlook for use in creating distribution lists etc.

- **Fax Broadcast**
  Send a Fax directly from your Workbench to all of the contacts on a list or series of lists (that have valid fax numbers)

- **Email Broadcast**
  Send an Email directly from your Workbench to all of the contacts on the list (that have valid email addresses).

- **Form Letter**
  Generate a form letter in MS Word format. This feature will merge the list(s) that you have selected to that letter and provide you with a finished document.

How does it Work?

Communications Manager uses a linear standardized linear process for accomplishing the above-mentioned tasks. What does that mean? It means that once you can do one thing in Communications Manager, you can do any other task using the same basic steps listed below:

Step 1 – Select a Task from the menu.

Step 2 – Check the lists that you want perform the selected task on.

Step 3 – Confirm your selections

Task-Specific Instructions, Hints and Issues:

1. Microsoft Outlook Export

Instructions:

This feature will only work correctly with the following software:

1. ***Internet Browser***: Microsoft Internet Explorer 5.5 to 6.0. (Functionality for Netscape is not available.)

    Browser Settings:
    You must alter your ActiveX settings in Internet Explorer. To do this you must follow the following steps:

1. Open Internet Explorer

2. Click Tools>>Internet Options

3. Go to the Security Tab

4. Click Custom Level and ensure the following settings:

    ActiveX Controls and Plugins
    - Download Signed ActiveX controls = Prompt
    - Download Unsigned ActiveX controls = Prompt
    - Initialize and Script ActiveX controls not marked as safe = Prompt
    - Run ActiveX controls and Plugins = Enable
    - Script ActiveX controls marked safe for scripting

2. Email Software: Microsoft Outlook Version 97 and above. (This feature will not work with Microsoft Outlook Express.)

Hints:

- To verify your version, go to the program, click *Help* on the menu and *About*. A window should pop up showing you the name of the program and its version number.

- If you cannot use this feature, there are other alternatives to retrieving this data. You can Export to CSV format, then import that data into your Outlook or other email program.

Issues:

- If you are using this feature and have Norton AntiVirus installed with the Script Blocking feature enabled, your attempts to retrieve contact data into Microsoft Outlook may fail. To work around this problem, disable Script Blocking in Norton AntiVirus.

For technical information on this please see Microsoft Knowledge Base article number Q303037 (msdn.microsoft.com).y

__Website Content Manager__

How does it Work?

Helpful Hints for Uploading Documents Using Website Content Manager:

- Remember that the person downloading the document from your site must be able to open the document in order for it to be of value to them. Therefore, ASI recommends that you adopt a standard for document posting

- Remember that the visitor must have the program for the document type in order to open it.

- Remember that simple is better. The simpler the document the less chance of encountering problems when posting or downloading.

Steps for managing website items:

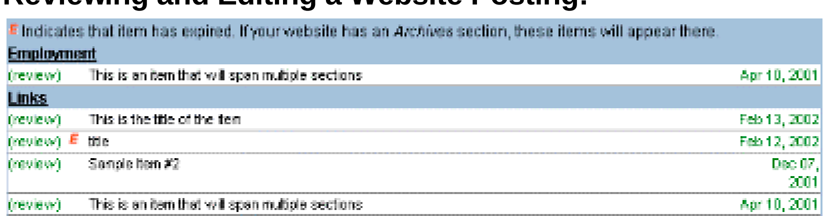
1. **Getting Started:**

From The Website Content Manager Standard Navigation Bar:

To review current items, click **SORT BY ALPHA** or **SORT BY SECTION.**

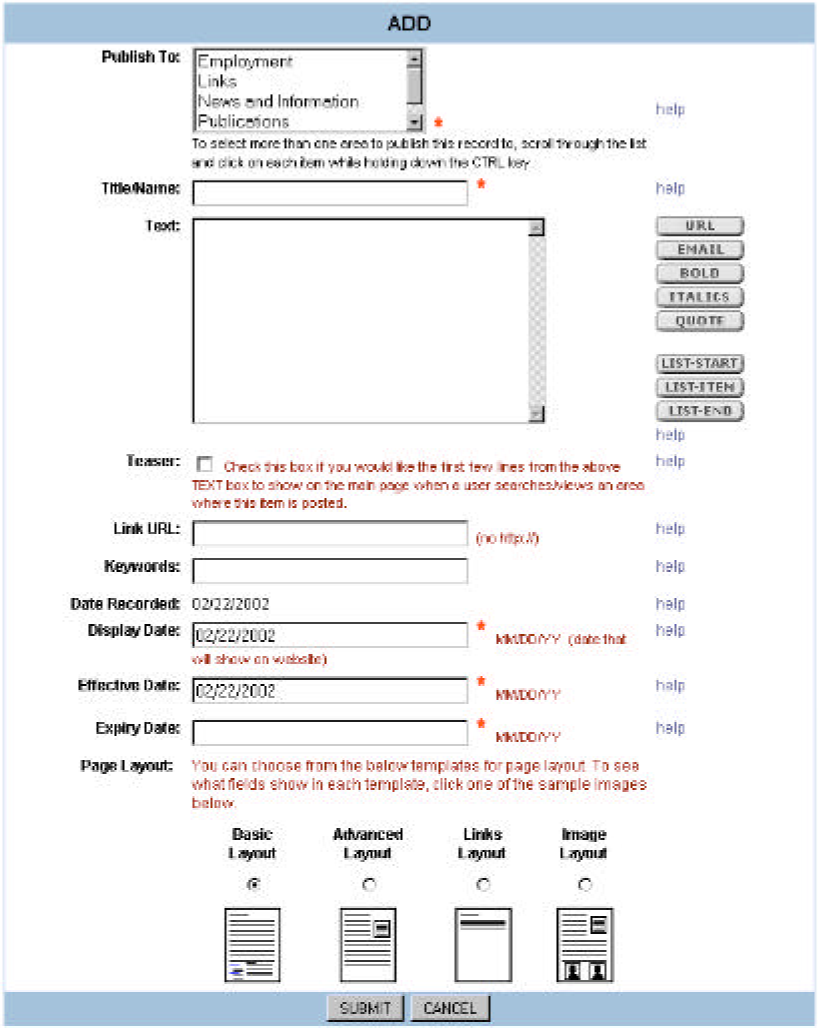
To add a new Item click **NEW**

2. **Reviewing and Editing a Website Posting:**



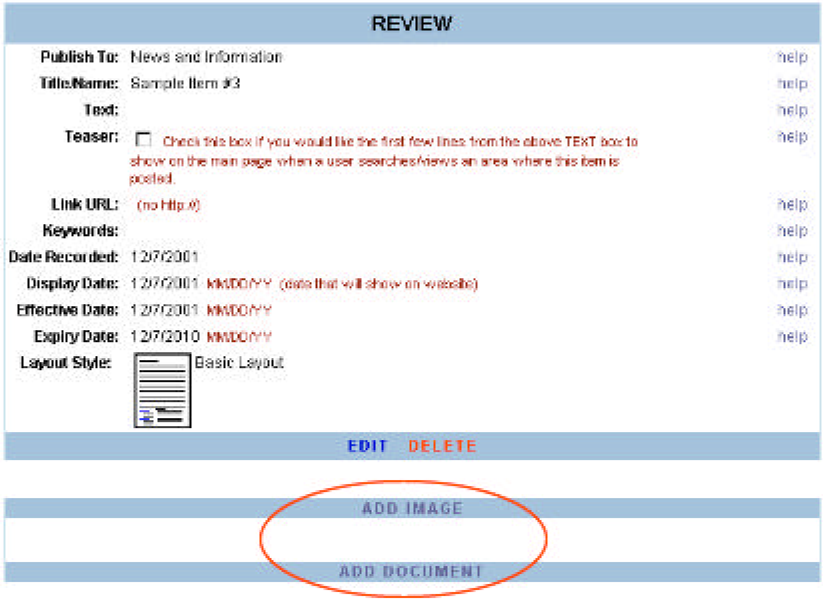
Item Review allows you to see what Website Items are active or archived on your site, and gives you the ability to edit them by clicking the **review** link. The red E indicates that the file has expired and is no longer visible on the public website.

3. **Adding a Posting to your Website:**

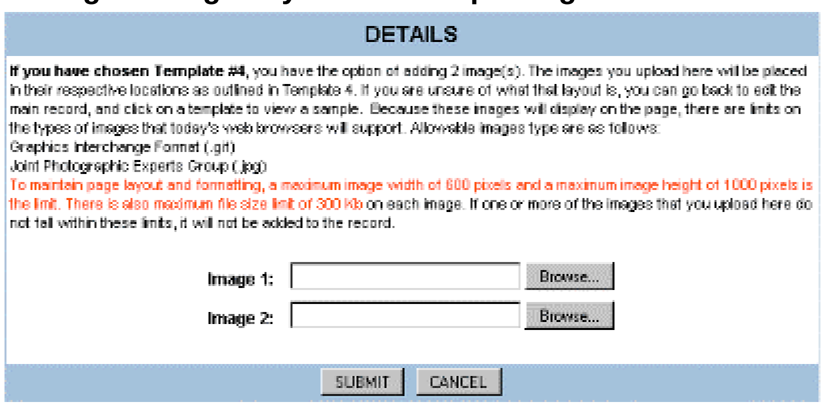


The **New Website Posting** screen contains several fields - some of which are required - denoted by the *. To find out what each field means select the Help link beside it.

After the Item is created, you will arrive at the Item review screen. Here you will able to add / edit details assigned to this item record. Also at the bottom you will have to option to Adding images and/or documents to your website posting.



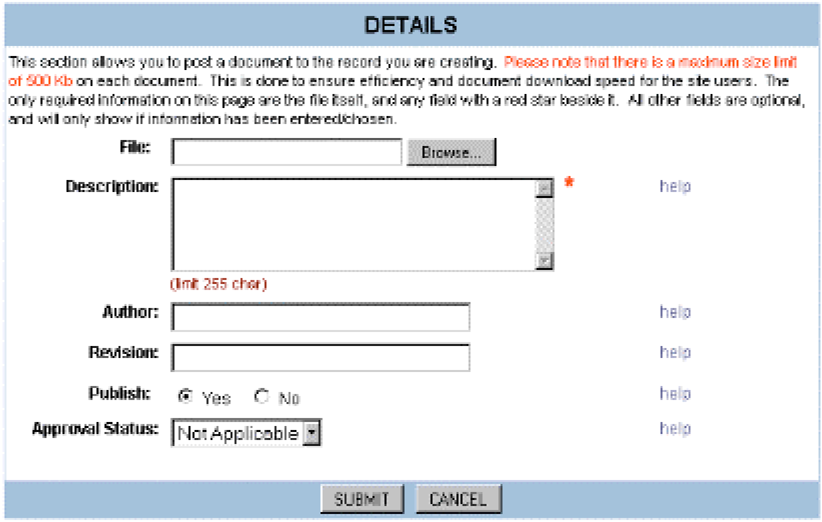
4. **Adding an image to your website posting**:



Begin by ensuring that you have selected a display template that allows you to post images to your website. Using one of these templates, you will have the option of adding up to 2 images. The images you upload here will be placed in their respective locations as outlined in the template you selected. If you are unsure of what that layout is, you can go back to edit the main record, and click on a template to view a sample. Because these images will display on the page, there are limits on the types of images that today's web browsers will support.

Allowable images types are as follows:
Graphics Interchange Format (.gif)
Joint Photographic Experts Group (.jpg)

Adding downloadable documents to your website posting:



Here you have the option of including the author, revision date, publish and approval status. If you choose 'no' for 'publish' status then the document that will be uploaded will not be viewable on the public website. Also, if you do not approve the document it's won't be shown on the public website.

You have successfully created your website item. Depending on the options you chose and the effective date, this item will be visible on your website

Terms and Descriptions:

Name: Typically this refers to the title of the record that you are creating. This text will be the first thing a user will see.

Status: **Required**

Keywords: If your website has sections that can be searched by the public, the Keywords field will be used to help them find records. The keyword field should be used to enter keywords that relate to the item you are creating. It is not necessary to enter words that already exist in the Name or Text fields as they will also be searched. However, you may wish to use this field to enter alternate spellings, common misspellings or plural forms of the words that may relate to the information you are providing. To assist you in choosing keywords, put yourself in the users' shoes and think of ways they would try to search for the item you are creating.

Status: **Optional**

Text:

If the item you are creating requires you to enter extensive text information, use this field. Using buttons located to the right of the text box you can mark up your text with HTML. Text can also be marked up manually.

Status: **Optional**

Link URL:

Use this field if you would like to provide the user with a link to another location on your website, or to another website. If entered, the title of the Item will become a link. The user will be able to click on it to navigate to the supplied url. When entering the URL, enter *www.thiswebsite.com*, do not include the *http://* in this field, this is entered for you.

Status: **Optional**

Record Date:

This is a system-generated date. It is recorded when you create the record.

Status: **Not Editable by User**

Display Date:

Use this field if you would like the date specified showing beside your listing. If no date is specified, the page will display the date when you created the record.

Status: **Optional**

Effective Date:

This represents the date that you would like the record to **show** on your website. This is effective when you would like to perform a bulk load of Records, and only have them visible when you say to.

Status: **Required**

Expiry Date:

This represents the date that you would like the record to no longer be visible on your website. You may wish to have this value set to a few days, weeks or a year after the Effective Date.

Status: **Required**

File Name:

When Adding a document or image, this is the actual filename as stored on your website by our servers. It is visible to you for reference purposes. You may notice that the filename is not exactly as it was on your computer, this may be due to duplicate files existing within your website folder. If this is the case, the system will save the filename with a number. i.e. Your file is *image.gif*. If a duplicate exists, then our system will save the file as *image(1).gif*.

Status: **System Generated**

File Content Type:

When adding a document or image and submit a file for upload, the system will extract and store the Content Type of the file. This is for reference purposes. Please Note that our system does not permit uploading of Executable (.exe) files as they pose a risk of being infected with a virus.

Status: **System Generated**

Event Manager

How does it Work?

Steps for creating a new Event: (* - beside the name denotes a required field)

1. In the **Event Review Screen** click **Add New Event.**

2. Fill out the fields requested and click **submit.**

3. You now have to option of assigning other information to your Event including:

    - **Event Type**
    - **Sessions**
    - **Details**

4. To **Categorize your Event**, select an event category from the drop-down list and then click **Add an Event Type**.

5. **Add a Session** - this will allow you to assign dates, fees, and accommodations

    - Fill out required and optional fields - click **submit**
    - If you would like to assign available accommodations or fees for the event - click on **edit** beside the session.
    - To add a fee, click **Add a Session Fee**, fill out the fields and click submit - this can be repeated to build a fee list
    - To add accommodations, click **Add a New Accommodation**, fill out fields and click **submit** - this can be repeated for each Room Type.
    - Once completed, click the **Submit** button for the Session. This will take you back to the Event View

6. If the Event has more than one session (i.e. more than one date), repeat step #5 above for each additional session.

7. The next step is to **Add Details to the Event**. The choices for details are varied, so please review your needs and choose an appropriate option.

    - To start - click **Add Event Detail**
    - Choose the Detail Type and fill out the text you want displayed
    - After you have finished building the Detail list, you have the option to specify how you want those items to appear (sort order) on the public website. Simply click the blue arrow ▲ to move the item up one. This can be done for each Detail Type or its notes.

Helpful Hints for Using Event Manager

When creating an Event, you may want to have another browser window open to view your Event while it is being created. Please review your Event completely after it is created.

If you want to create an Event and check everything before it goes live, set the Event Session Effective Date to a date that is later than the current date. This will ensure that your event is not visible on the public website while you are reviewing it. Once completed, make sure that you set the Effective Date correctly.

Terms and Descriptions

Event Name: The Event Name the name of the Event. The text used should be short and to the point. It is recommended to use the actual title of the Event.

Status: **Required**

Event Code: Some Events may require an Event Code to be entered. This code will be visible in the public website. If it is not entered, it will not show.

Status: **Optional**

Keywords: The keyword field should be used to enter keywords that relate to the event that you have listed. It is not necessary to enter words that already exist in the Event Name, Code, Dates, or Location as they will also be searched. However, you may wish to use this field to enter alternate spellings, common misspellings or plural forms of the words that may relate to your event. To assist you in choosing keywords, put yourself in the users' shoes and think of ways they would try to search for your event.

Status: **Optional - but recommended**

Event Note: Use the Event Notes field to enter administrative notes to yourself or other users that manage content for your Organization. The notes can contain whatever you would like. You are limited to 255 characters. **This field will not be visible on the public website**

Status: **Optional**

Event Type: Use this option to select how you would like your Event to be categorized. To do this, select *Add Event Type* and select from the pulldown box. Submit your choice and repeat this step if you would like to categorize your Event further. On the public website, when a user searches for Events by Keyword, they will be asked to choose an *Event Type*. They have the option to choose to search all Events, or Events of a specific Type.

Status: **Required**

Session Location: From the location pick list that is managed by your Organization, select a location where the Event will be held. This is the actual physical location of the Event, not the accommodations. There is another section for that.

Status: **Required**

Session Contact: From the Contact pick list that is managed by your Organization, select a contact for this Event Session. This will be the person that will be contacted regarding questions about the Event you are having. This person is **not** the same as a contact for Accommodations. You will be able to specify this contact in the Accommodations section.

Status: **Required**

Date Start: This value represents the actual date that your Event will start on.

Status: **Required**

Date End: This value represents the actual date that your Event will finish. If the Event is one day, simply enter the same date as Date Start. The system will take care of the display of the dates.

Status: **Required**

Effective Date: This value represents the Date at which you would like the Event to show on the public website. This is effective when you would like to perform a bulk load of Events, and only have them visible when you say to.

Status: **Required**

Expiry Date: This value represents the Date at which you would like the Event to no longer be visible on the public website. You may wish to have this value set to a few days, weeks or a year after the Effective Date.

Status: **Required**

Record Date: This date value is generated by the system and cannot be modified, it will tell you the date when the record was last modified.

Class Size: If your Event has seating limitations, place the value here. This value may represent available seating in a class, or number of seats in an auditorium. If this value is not required, simply leave it blank.

Status: **Optional**

Duration: In some instances, it may be required to specify an Event duration. The actual duration value may be different than the value stated on the Starting and Ending dates. For example, if there is a one day Event, you may wish to specify that the duration is 4.5 hours.

Status: **Required**

Fee Type: Use this drop down menu to select from the available fee types that can be used when creating a fee list for your Event. You may create more than one fee for an Event, but you cannot specify the same Fee Type more than once. If the Event is free of charge, choose the Free Admission option and follow the steps below in the Fee field.

Status: **Required**

Fee: Based on the Fee Type that you have selected, enter the fee in the following format ###.##. It is not necessary to enter the $ symbol, as the system will do this for you. If the Event is free, just simply enter a value of 0.

Status: **Required**

Tax Status: Select the radio button that applies to choose the appropriate tax(es) that are to be applied to the fee. If there are no taxes, select the *none* option.

Status: **Required**

Fee Note: Use this field to record fee-specific information for the particular fee type. The Fee Note will show on the public website if you have entered information here. This field is limited to 255 characters.

Status: **Optional**

Accommodation Location: If you would like to show available accommodations for your Event, use this dropdown list to choose where the accommodations are. i.e. If your event is at the Metro Toronto Convention Center, and accommodations are available at the Crown Plaza Hotel, you would choose Crown Plaza Hotel from the list.

Status: **Required**

Accommodation Contact: If you have chosen to show an Accommodation, you must choose a contact for this Accommodation. This contact will be the person that a website user will call if they have questions regarding accommodations at the location specified.

Status: **Required**

Room Type: Use this pulldown list to select the room type that is available.

Status: **Optional**

Room Fee: If you have selected a Room Type and wish to show the fee for that room, enter it here. It is not necessary to enter the $ symbol as the system will do it for you.

Status: **Optional**

Detail Type: The Detail Type field enables you to provide the potential attendees of your event with information such as; what the Event is about, registration times, lunch, materials required / provided, target audience, special notices, passing grades, credits etc... Use the Detail Type pulldown to choose which one you would like to have. You can select more than one Detail Type and provide more than one description for each, but repeating the process of adding a new Detail Type. When finished, you will be back at the Event View screen. There will be blue arrows that you can use to sort the Detail Types and their respective notes in any order you wish. What you see, is how it will show on the public website.

Status: **Required**

Detail Text: Once a Detail Type is selected, use this field to provide a description of the detail item. This description can be long, but it is not recommended. You may select one or more Detail Type / Text combinations. You can also choose which way you would like the details and their descriptions sorted by using the up arrows in the Event View.

Status: **Required**

Location Name: Enter the name of the Location as you would like it to be seen on the website. i.e. International Plaza Hotel.

Status: **Required**

Address: Use the available address fields to enter address information for the record.

Status: **Optional**

Location Note: Use this field to enter notes regarding the Location record you are creating. The notes you enter will not appear on the public website.

Status: **Optional**

Contact Name: Enter the name of the contact for which you are creating. The name will display as entered.

Status: **Required**

Contact Title: If required, enter a title for the Contact you are creating.

Status: **Optional**

Contact Note: Use this field to enter notes regarding the Contact record you are creating. The notes you enter will not appear on the public website.

Status: **Optional**

Phone: Enter the phone number for the record.

Status: **Optional**

Fax: Enter the fax number for the record.

Status: **Optional**

URL: If the record you are creating has a website, enter the URL here. The website address will appear on the public website as a clickable link. **Note: do not enter http://**.

Status: **Optional**

Email: If the record you are creating requires an email, enter it here. i.e. info@yourdomainname.com

Status: **Optional**