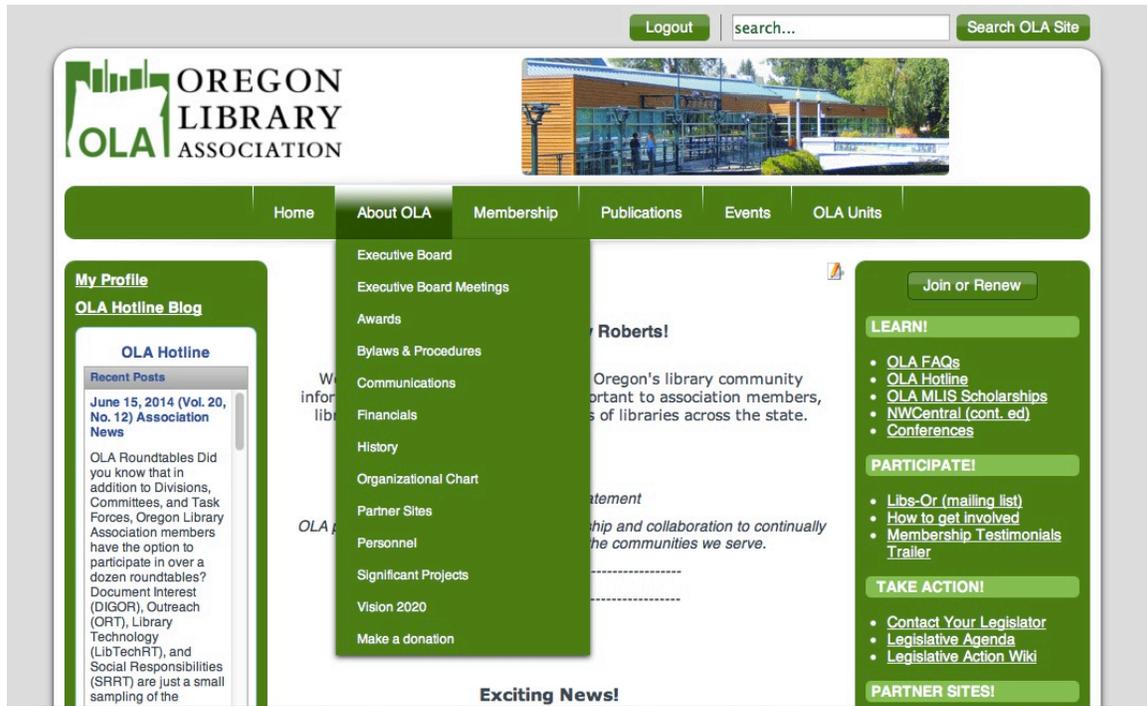


## OLA Incoming Officer Information Financials / Memberclicks Web Page & Forms

A lot of information can be found from the OLA web page (<http://www.olaweb.org>) under the “About” tab.



### Financials

1. Each unit has access to an Enterprise Fund. This fund records monies that are raised specifically by your OLA unit and can be expended at the unit chair’s approval.
2. Each month the unit chair will receive the general OLA financial reports: 1) OLA Balance Sheet, 2) Profit and Loss Statement, 3) Profit and Loss Statement compared to the previous year activity and 4) Enterprise Fund Report. Also, if the unit has financial activity (deposit(s) or expenditure(s)), they will receive a transaction report documenting what that activity was. These forms are emailed and for upcoming board meetings the most recent will be posted Under the “Executive Board Meetings” tab above.
3. Monies from a workshop(s)/event(s) are most often collected by a member of the unit and then forwarded onto the Association Manager for deposit. A deposit form must be included with the check(s). That form can be found under the “Financials” link above.

Request for payment of invoices or reimbursement for payment of expenditures and Expense Request Report Form (ERRF) must be completed either by the unit head or by the person requesting the check. This form can also be found under the “Financials link

above. The ERF form must be approved by the unit chair before coming to the Association Manager for payment.

## Memberclicks / Web Page

### Memberclicks

1. Check out log-in documentation provided in separate document.

### Web Page(s)

The screenshot displays the Memberclicks web page interface. At the top, there is a blue navigation bar with tabs for 'Admin Home', 'Website', 'Components', 'Database', 'Forms', and 'Reports'. On the right side of this bar are links for 'View My Site' and 'Logout'. Below the navigation bar, there is a green menu bar with icons for 'New Section', 'Edit Sections', and 'Help'. A dropdown menu is open under the 'Website' tab, listing options: 'Article Manager', 'Category Manager', 'Front Page Manager', 'Media Manager', and 'Menu Manager'. On the left side, there is a 'Set Up Shortcuts' section with a 'Set Up Shortcuts' button. On the right side, there is an 'Admin Home Statistics' section with a table of profiles and their counts.

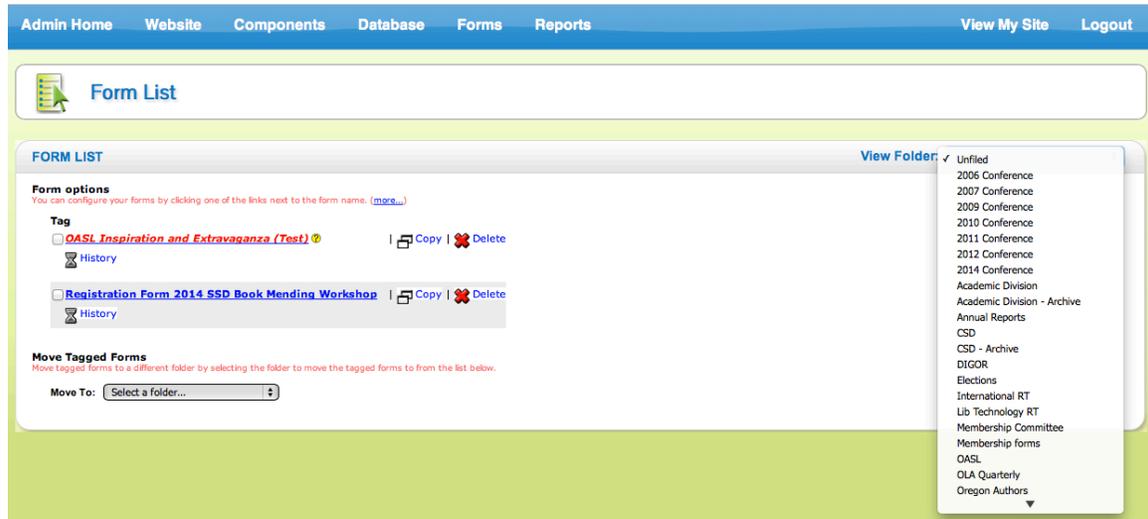
Profiles	Number	Actions
ASA Profiles	2	<a href="#">View</a>
Active Profiles	1038	<a href="#">View</a>
ALA Student Members	78	<a href="#">View</a>
Admin	4	<a href="#">View</a>
Admin_limited	29	<a href="#">View</a>
Associate Member	0	<a href="#">View</a>
Basic Contact	16	<a href="#">View</a>

The web page is hosted by Memberclicks and it's design was originally developed by an OLA committee. Each unit may have their own home page, which is generally created and maintained by a member of the unit. There is a limited number of layout templates that are recommended for use.

In Memberclicks, web pages are called "articles." You can search for your unit's web page(s) there and edit or use the link "As Myself" under the "View My Site" drop down box in blue menu bar. Find your unit under the "OLA Unit" tab in the green menu bar, select it, and then click on the pencil in the right hand corner of the page to edit.

It is simple to add links to online pages and documents. Having the URL is all that is necessary and then just a few steps within Memberclicks to insert that link. To upload documents, such as minutes requires a few more steps. The Association Manager created a video tutorial, here is the URL for viewing: <http://youtu.be/p7sLVRHZMvM>

## Memberclicks / Forms



The screenshot displays the 'Form List' page in the Memberclicks system. At the top, a blue navigation bar contains links for 'Admin Home', 'Website', 'Components', 'Database', 'Forms', and 'Reports', along with 'View My Site' and 'Logout' on the right. Below the navigation bar, the page title 'Form List' is shown with a document icon. The main content area is titled 'FORM LIST' and includes a 'View Folder:' dropdown menu. Under 'Form options', there is a note: 'You can configure your forms by clicking one of the links next to the form name. (more...)'. The 'Tag' section lists two forms: 'OASL Inspiration and Extravaganza (Test)' and 'Registration Form 2014 SSD Book Mending Workshop'. Each form has a 'Copy' icon and a 'Delete' icon. Below the forms, the 'Move Tagged Forms' section includes a note: 'Move tagged forms to a different folder by selecting the folder to move the tagged forms to from the list below.' and a 'Move To:' dropdown menu with the text 'Select a folder...'. The 'View Folder:' dropdown menu is open, showing a list of folders including 'Unfiled', '2006 Conference', '2007 Conference', '2009 Conference', '2010 Conference', '2011 Conference', '2012 Conference', '2014 Conference', 'Academic Division', 'Academic Division - Archive', 'Annual Reports', 'CSD', 'CSD - Archive', 'DIGOR', 'Elections', 'International RT', 'Lib Technology RT', 'Membership Committee', 'Membership forms', 'OASL', 'OLA Quarterly', and 'Oregon Authors'.

Memberclicks provides the ability to create forms for event registration, elections, surveys, etc. These forms can be found under the “Forms” link in the blue menu bar. Select “Form List” and then from the landing page note in the right hand corner the “View Folder.” Each unit that has created forms has a folder. In their folder will be all the forms that have been created by/for them. What is really nice is you can copy older forms and update with new information. This makes it so much easier and quicker not having to create the form from scratch.

## Memberclicks / Other

Memberclicks allows for a number of other modules, such as listservs, messaging, calendar, etc. I have reviewed the training videos from Memberclicks and feel that they are too detailed for quick and easy use of the software. In the future, I plan to develop more training videos to address the steps necessary for article editing, form creation/editing, affiliation searches, affiliation contact, etc. In the meantime, if you have a need or question, don't hesitate to contact me, Shirley Roberts, [sroberts.ola@gmail.com](mailto:sroberts.ola@gmail.com) or 541-962-5248, your Association Manager.

## OLA BOARD RESOURCES

1. Also available to OLA Board members is a resource page where you will find OLA logos, letterhead, GoToMeeting scheduling instruction, etc. It can be found under the “About OLA” in the green menu bar under “Executive Board.” It will require you to login to gain access to this information.

Again, I want to emphasize, if you have any questions, concerns, etc. do not hesitate to contact me. I try to read my email multiple times a day to provide help when you are currently working on OLA projects, events, etc. Also my cell phone number is available and it available will answer when called. I do look forward to working with you over the next year and getting to know you or know you better.

--Shirley Roberts  
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