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 ERRF 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 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](http://youtu.be/p7sLVRHZMvM)
Memberclicks / Forms

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 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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