

Membership Roster Dashboard User Guide

Overview and General Information

The Membership Roster Dashboard replaces the current Roster Tool. It replicates the information accessible through the current tool and adds a new Dashboard of data visualizations (charts and graphs).

This User Guide

This User Guide, together with online FAQs and just-in-time videos, provides step-by-step instructions on how to use the Membership Roster Dashboard to get the information you need to more easily manage and gain insight into your chapter or region membership.

At-a-glance comparison – Membership Roster Dashboard v. Roster Tool











Feature	Membership Roster Dashboard	Roster Tool
Membership data pulled directly from CSI database		
Rosters export to Excel		
Your chapter or region is automatically identified when you log in		
Interactive Dashboard with charts and tables of key chapter and region member data		
Chapter member data rolls up to Region dashboard for an overall view		
Regions have access to chapter rosters and dashboards		 Roster only

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Logging In

URL: zap.csinet.org

Username and Password: One chapter or region-specific username and password is provided when the training requirement* is met. Your chapter or region directs CSI as to what leaders will receive the initial log-in. Sharing it with your other leaders is your decision.

**Training requirement = at least one region or chapter leader completes the training webinar (live or recorded) and provides CSI with one or more leader names and emails for sending the login credentials.*

When you log in, you are directed to one of two landing (home) pages.

Public* (Home) Page

**Public is an internal term and does not mean that the page is viewable by everyone. Access is determined by the username and password you are provided.*

Chapter public page

☰ Public ▾

Chapter Access

3

Region public page

☰ Public ▾

Chapter Access

3

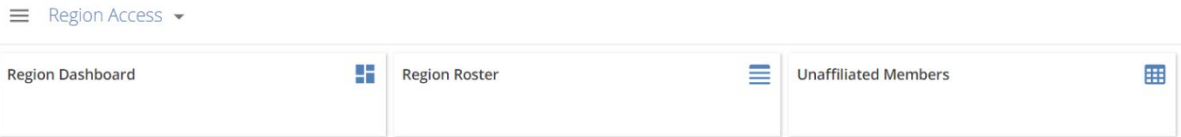
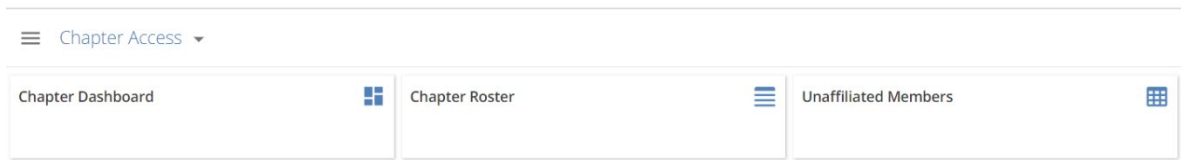
Region Access

3

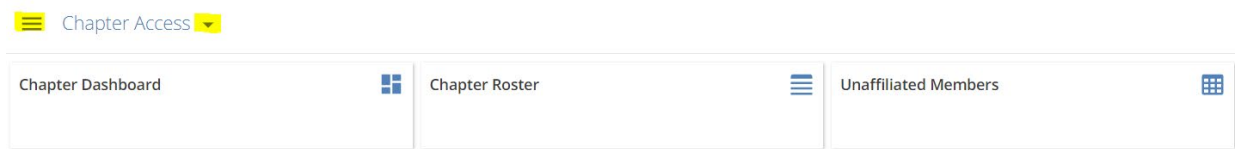
Your public page is how you navigate between chapter access and region access.

Navigation and Access

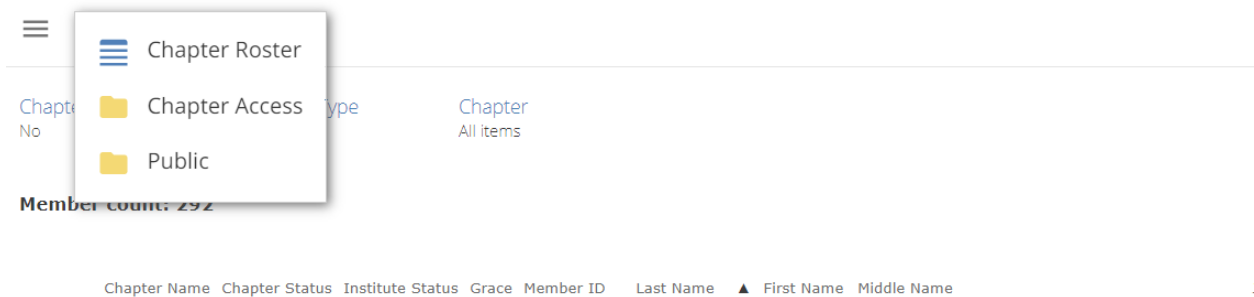
Clicking the Chapter or Region Access button allows you to choose from the Dashboard, Roster, or Unaffiliated Members:



You can return to the public page by clicking on either the hamburger menu (three stacked lines) or the down arrow to the right of the page name and selecting Public.



When you are in the Dashboard, Roster, or Unaffiliated member pages, you can return to this access page by selecting Chapter Access or Region Access from the hamburger menu or the down arrow to the right of the page name.



Rosters

- Chapters have access to their own chapter roster only.
- Regions have access to their own region roster and to the roster for each chapter in the region.
- Due to the quantity of member data included in the rosters, they may take a minute or two to load.
- The maximum number of records that display on a single roster page is 400. If your membership exceeds 400, your online roster will have 2 or more pages. When exporting to Excel, all records are included in the same export.

Chapter Roster for Chapter Leaders

The Chapter Roster displays one row for each chapter member with the same columns of information displayed as in the current roster tool.

Chapter Name	Chapter Status	Institute Status	Grace	Member ID	Last Name	First Name	Middle Name
Chicago	Active	Active	No	2047429	Abel	Gregory	Unknown
Chicago	Active	Active	No	1058562	Affrunti	Mark	Charles
Chicago	Active	Active	No	2127085	Alexis	Jean	Unknown
Chicago	Active	Active	No	1811619	Anderson	Robert	Unknown
Chicago	Active	Active	No	1471145	Araujo	Fernando	Unknown
Chicago	Active	Active	No	1059624	Archer	David	Bryan
Chicago	Active	Active	No	2006075	Babaian	Peter	Unknown
Chicago	Active	Active	No	1468302	Backstrom	Joakim	Unknown
Chicago	Active	Active	No	2021927	Balg	Basit	Unknown

Using the **In Grace?** filter at the top of the page, you can choose whether to include those members whose memberships are past due but not yet terminated (In Grace). Your options are to exclude those In Grace (the default), view *only* those members with In Grace status, or view all.

In Grace?
No
(Select All)
No
Yes

Member Type
All Items
(Select All)
Emerging Professional
Emeritus
Lifetime
Professional
Retired
Student

Using the **Member Type** filter, you can choose to display only one member type, all member types, or a combination of member types you choose.

When member information is either not available (not supplied by the member) or not applicable, **“Unknown”** will display in the roster.

To hide columns, sort the data as desired, produce reports of your own design, or share the roster with others, download it to Excel.

Region roster for Region Leaders

The Region Roster for region leaders functions just like the Chapter Roster for chapter leaders described above.

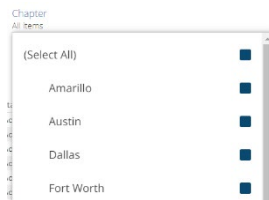
It displays all CSI members, including Unaffiliated, who are assigned to the Region.

Special considerations when Region leaders view Chapter Rosters

By default, when Region leaders select Chapter Access from the landing page and then select Chapter Roster, the roster displays **every chapter membership in the Region**. This means that if a member has membership in more than one chapter in the region, there will be a row for each membership.

For example, if Sally is assigned to the West Region and joins the San Francisco, East Bay-Oakland, and Monterey Bay chapters, she will be listed three times and counted as three memberships.

When a Region leader is viewing Chapter rosters, no unaffiliated members will be displayed or counted.



To view the roster for only one chapter, use the filter labeled **Chapter**. Click on the filter, unselect Select All, then select the one chapter you want to view. The roster for that chapter will be built.

To hide columns, sort the data as desired, produce reports of your own design, or share the roster with others, download it to Excel

Roster Toolbar

Exporting rosters is done via the Roster Toolbar.

Search Select page to view Available filters

Click to add/remove from your Favorites

Designer — No functionality

Print — Print dialogue box **We recommend you DO NOT PRINT. Download to Excel instead.**

Home Page — Makes this your home page

Download

PDF } File types you can save to your device. **We recommend you download to Excel.**

CSV }

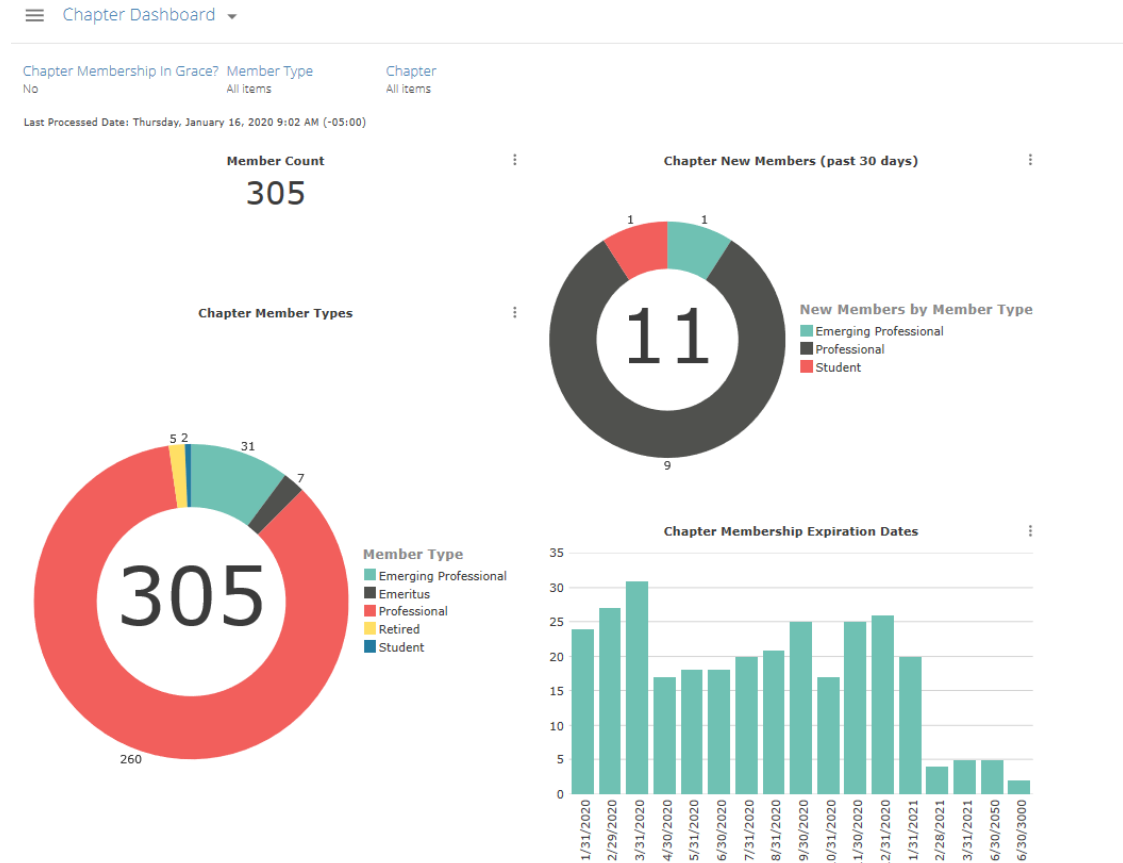
Excel }

Help — Not applicable. Email ChapterRegionHelp@csinet.org for help.

Dashboards

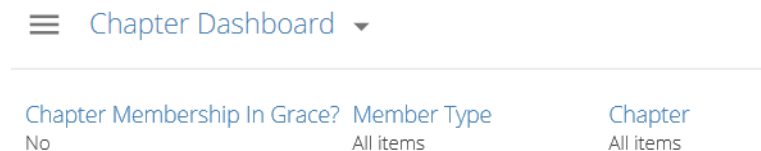
Dashboards provide key data visualizations (charts, graphs, and tables) for chapters and regions.

Chapter Dashboard



Filters

You can adjust the data displayed on the Dashboard by using the Filters (available filters) at the top of the page.



Counts and Visualizations

The Dashboard provides key numbers to help manage your chapter. Counts and visualizations are updated once each 24-hour period.

Active Member Count – the number of chapter members as of the previous day

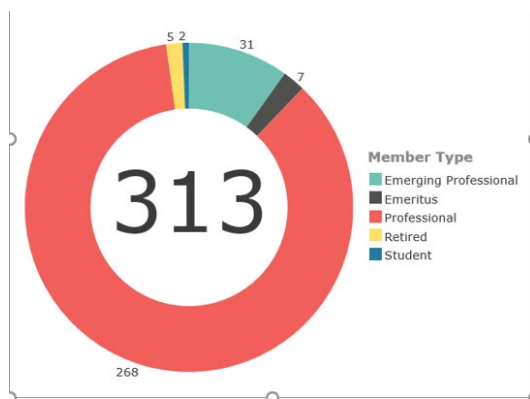
Chapter New Members (past 30 days) – new chapter members in the past 30 days, visualized by member type



Clicking on a segment of the pie chart brings up a report (drill-through) that displays the underlying member data.

You can download these reports to an Excel file.

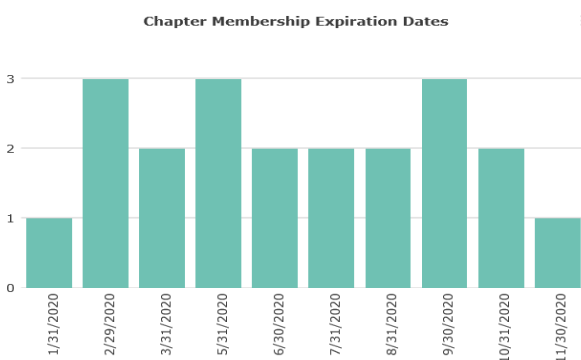
Chapter Member Types – chapter memberships, as of previous day, visualized by member type



Clicking on a segment of the pie chart brings up a report (drill-through) that displays the underlying member data.

You can download these reports to an Excel file.

Chapter Membership Expiration Dates



This bar graph visualizes the chapter membership by expiration date.

Double clicking a bar on the graph brings up a report of the members expiring on the date selected.

You can download these reports to an Excel file.

Region Dashboard

Region Dashboard

Member Type: All Items
Region: All Items

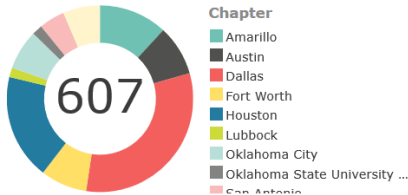
Last Processed Date: Monday, January 13, 2020 8:58 AM (-05:00)

Memberships Count: 606 Grace Memberships: 16 Terminated (LM): 10 New memberships last 30 days: 7 Due to Renew (Next 30 Days): 51

Region by Member Type



Member Affiliation Analysis - Chart



Member Affiliation Analysis - Table

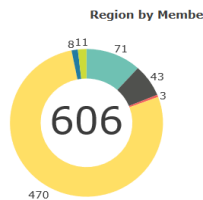
Chapter	Count	New Members (Last 30 Days)	Due to Renew (Next 30 Days)	Terminated
Amarillo	72	1	3	
Austin	53	0	7	
Dallas	193	2	11	
Fort Worth	49	0	0	
Houston	111	3	17	
Lubbock	10	0	2	

The top half of the page displays information about the Region, and the lower half displays information about the chapters in the region.

This is an important distinction.

- The membership count in the Region section (top) is the number of active **unique** region **members** (including unaffiliated) and matches the member count on the Region Roster.
- The Member Affiliation Analysis Chart in the lower half of the page includes only those with chapter membership (no unaffiliated members) and is the sum of all **chapter memberships** in the region. If a member belongs to 3 chapters in the region, they are counted 3 times).
- Since one is counting **members**, and the other is counting **memberships**, the two counts will not match. If they do match, it is purely coincidental.

The member counts in these two pie charts will not match



Member Affiliation Analysis - Chart



Region Dashboard - Region Information Section

Filters

You can adjust the data displayed on the Dashboard by using the filters at the top of the page.

☰ Region Dashboard ▾

Member Type
All Items

Region
All Items

Counts and Visualizations

Last Processed Date: Monday, January 13, 2020 8:58 AM (-05:00)

Memberships Count	Grace Memberships	Terminated (LM)	New memberships last 30 days	Due to Renew (Next 30 Days)
606	16	10	7	51

The region Counts provide key numbers to help manage the region. Counts are updated once each 24-hour period.

Membership Count – the number of members assigned to the region, including unaffiliated, as of the previous day.

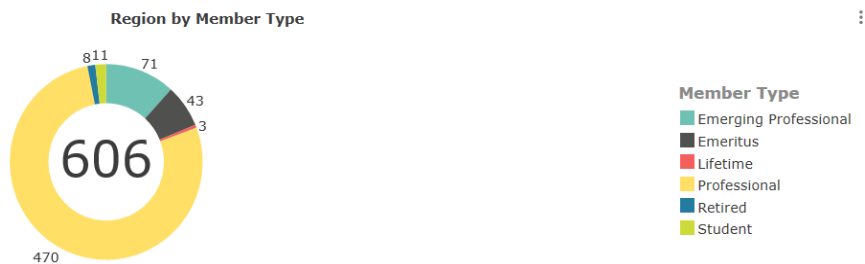
Grace Memberships – the number of region members whose memberships are past due by less than one month, as of the end of the previous day. If not paid, their membership will be terminated at the end of the current month. This count will be highest at the beginning of the month, and you want to see it decrease as the month goes on.

Terminated (LM) – LM stands for Last Month. Membership terminations are processed once per month at the end of the month. This number will generally stay the same throughout the month and update on the first or second day of the month.

New Memberships last 30 days – new members assigned to the region within the past 30 days, as of the previous day. This count includes unaffiliated members and chapter members regardless of chapter location.

Due to Renew Next 30 days – the number of region members with expiration dates in the next 30 days.

Pie Chart and Legend – Region by Member Type

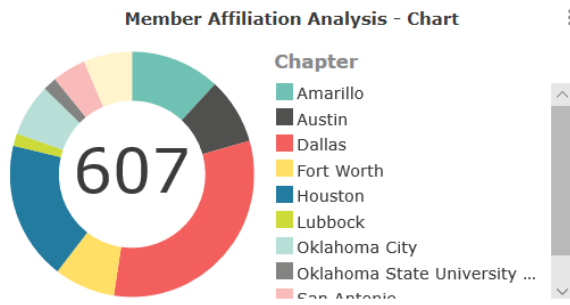


Each segment of the pie chart is clickable and brings up a report displaying the detail for that segment.

Tip: You can highlight a segment on the pie chart by clicking the corresponding Member Type name in the Legend.

Region Dashboard – Chapter Information Section

Pie Chart – Member Affiliation Analysis Chart



This pie chart visualizes the region by chapter memberships. A member is counted once for each chapter membership they hold in the region. It does not include unaffiliated members.

You can highlight a segment of the pie chart by clicking on the chapter name in the legend.

Member Affiliation Analysis Table

This table provides key member counts for each chapter without needing to go to each chapter’s dashboard or roster.

Member Affiliation Analysis - Table

Chapter	Count	New Members (Last 30 Days)	Due to Renew (Next 30 Days)	Terminated (Last 30 Days)
Amarillo	72	1	3	
Austin	53	0	7	
Dallas	193	2	11	
Fort Worth	49	0	0	
Houston	111	3	17	
Lubbock	10	0	2	
Oklahoma City	10	0	0	

Special Considerations for Regions accessing a Chapter’s Dashboard

By default, the Chapter Dashboard displays the sum of all chapter memberships in the Region. To view the Dashboard for a single (or selected) chapters, use the Chapter filter at the top of the page. First, unclick Select All, then select the Chapter Dashboard you want to view.

Chapter Dashboard

Chapter Membership In Grace? Member Type: No

Last Processed Date: Monday, March 2, 2020 9:02 AM (-05:00)

Active Member Count: 586

Chapter Member Types: All Items

Chapter: All Items

(Select All)

- Amarillo
- Austin
- Dallas
- Fort Worth
- Houston
- Lubbock

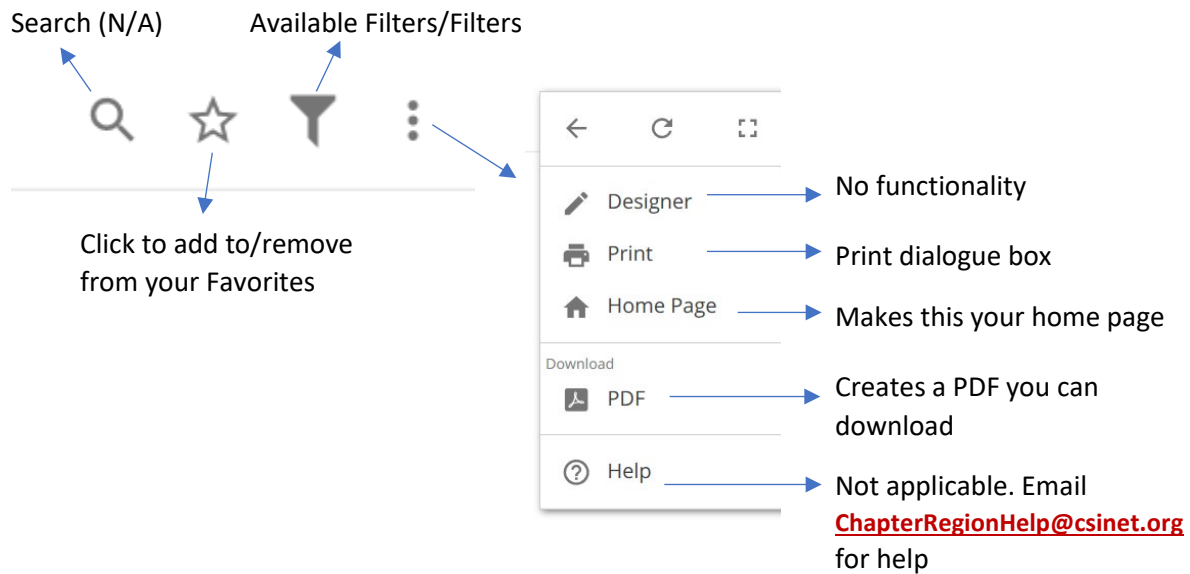
New Members by M

- Emerging Professional
- Professional

You can also use the filters to change whether In Grace members should be included and to adjust the Member Types being displayed.

Dashboard Toolbar

Printing your Dashboard is done via the Dashboard Toolbar in the upper right corner of the screen. Both chapters and regions have the same Dashboard Toolbar.



Unaffiliated

The Unaffiliated Member page works the same for Regions and Chapters.

It gives you access to information on CSI members who have no chapter affiliation. There are four pre-defined filters you can use to create a report with the member records you want to see:

Grace: the default is to exclude those members in their grace period. You can leave the default as is, select to view only those members In Grace, or view all.

Membership Type: use this filter to select one or more membership types you want to include. The default setting is to include All Member Types.

State: You can select one state, several states, or view all states, U.S. territories, or Canadian provinces.

ZIP Code: ZIP codes are linked to the states in which they located, meaning that when searching by ZIP code, you must also select the state from the State filter.

☰ Unaffiliated Members ▾

Grace
No

Membership Type
All items

State
None

Search by ZIP

Suggestions for Using this Tool

Rules of the road

- At least one leader from each chapter or region must complete training (either live or recorded webinar) before login credentials will be provided.
- Only the President of a chapter or region can request a change/reset of the login credentials assigned by CSI.
- While the chapter or region can choose to provide their login or reports generated by the Membership Roster Dashboard to any or all their leaders, **sharing logins or reports with other chapters or regions is a violation of member privacy and is prohibited.**

How the Membership Roster Dashboard helps your chapter

Frequency	Action	Benefit
End of Month, at minimum	Monitor Active Member count Record the number at the end of each month	Track peaks and dips in membership. Identify patterns in membership
Weekly	Monitor new members	Welcome new members more quickly and ensure they receive all chapter communications.
End of Month	Record members by Membership Type	Know if you're growing the membership segments you want to attract.
Monthly, at a minimum	Actively work your Chapter Membership Expiration Dates.	Retain more members by creating a contact strategy that spans 3 months.

How the Membership Roster Dashboard helps your region

Frequency	Action	Benefit
Monthly, at a minimum	Monitor your Membership Count	Track peaks and dips in membership. Identify patterns in membership
Weekly Weekly Monthly	<ul style="list-style-type: none"> • Monitor Due to Renew (decreasing) • Monitor Grace Memberships (decreasing) • Compare your Terminated Members to your Grace Memberships from the preceding month 	Increase Retention: Are your members renewing, and when? Before their expiration? During their grace period? After their membership has been terminated?
Weekly	Monitor Member Affiliation Analysis	More effectively assist the chapters in your region by more quickly identifying the hot and cold spots

Help us help you!

Questions? Need some help and support?

We've implemented a component support ticket system, so please let us know what you need by emailing ChapterRegionHelp@csinet.org.

Let us know what you think about this new Membership Roster Dashboard. It's built to evolve as we understand together what we need at the chapter, region, and national level to deliver the service our members deserve and expect.