



Virtual Branches

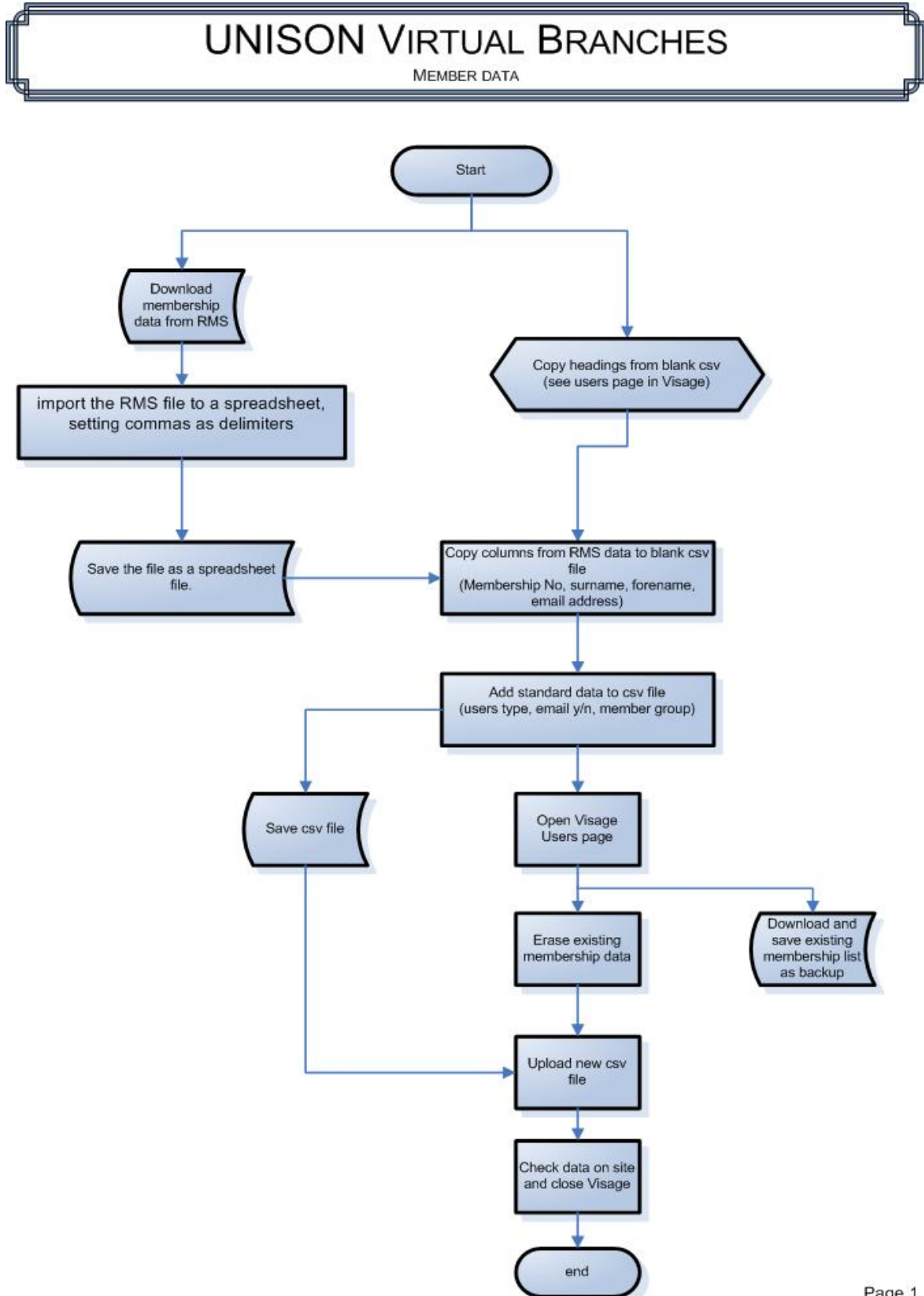
Website Membership Data

Procedure for handling membership data in Visage:

1. Follow the flow chart in Appendix A.
 1. Download or obtain your latest membership file from UNISON's RMS system. This should download as a CSV file.
 2. Open the CSV file in your spreadsheet program.
 - a. If you have downloaded a ".txt" file you will need to import this, setting commas as delimiters and saving as a csv file
 3. Open a blank spreadsheet file.
 - a. It will be useful to create a blank file with the correct column headings for use as a template for future uploads.
 - b. The headings (listed in Appendix B) can be obtained by downloading the existing file from your website.
 - c. Copy the headings to a new file, and save this as a CSV file.
 4. Copy or add the data as follows:
 - a. Copy membership number to USERNAME
 - b. Copy Surname to PASSWORD
 - c. Copy forename to GIVEN
 - d. Copy Surname to FAMILY
 - e. Copy email address to EMAIL
 - f. Set ALLOWEMAIL to YES
 - g. Set STATUS to V
 - h. Copy USERNAME and PASSWORD to CUSTOM1 and CUSTOM3
 - i. Set GROUP1NAME to members
 5. Open Visage and go to the Users page
 - a. Download existing data file from the users page and save this as a backup file in case of any problems.
 - b. Delete existing data
 - c. Upload new data

6. check the data
 - a. Test Add newsletter to ensure all groups are showing
 - b. Purge empty groups
 - i. Open user groups page
 - ii. Click empty groups
 - iii. Select delete empty groups

Appendix A - Flow chart of membership data process



Appendix B - Structure of CSV file

The data to upload needs to be compiled in a spreadsheet with the columns below. The spreadsheet must be saved and loaded as a "CSV" file and not a spreadsheet file, otherwise the member database will be corrupted.

Column name	description
USERNAME	The membership number of site members or user name allocated to other users
PASSWORD	Surname for site members or allocated password for others
GIVEN	First name
FAMILY	Surname
EMAIL	Email address the site member is happy to receive email at
ALLOWEMAIL	YES or NO depending on any preference on RMS or otherwise voiced
SMS	Mobile phone number
ALLOWSMS	YES or NO depending on any preference on RMS or otherwise voiced
STATUS	Site members use "V" others should be set up as needed
CUSTOM1	The custom fields are for use for any extra information the branch wishes to record – for example – workplace name.
CUSTOM2	
CUSTOM3	Add the username data here
CUSTOM4	Add the password data here
CUSTOM5	
CUSTOM6	
CUSTOM7	
CUSTOM8	
CUSTOM9	
CUSTOM10	
CUSTOM11	
GROUP1.NAME	The names of the user groups the member belongs to should be recorded here.
GROUP2.NAME	Groups do not have to be in any specific columns
GROUP3.NAME	You may find it easier to put all the general members in the same column and use the other columns for other groups.
GROUP4.NAME	
GROUP5.NAME	
GROUP6.NAME	
GROUP7.NAME	
GROUP8.NAME	