# MyHonorSociety
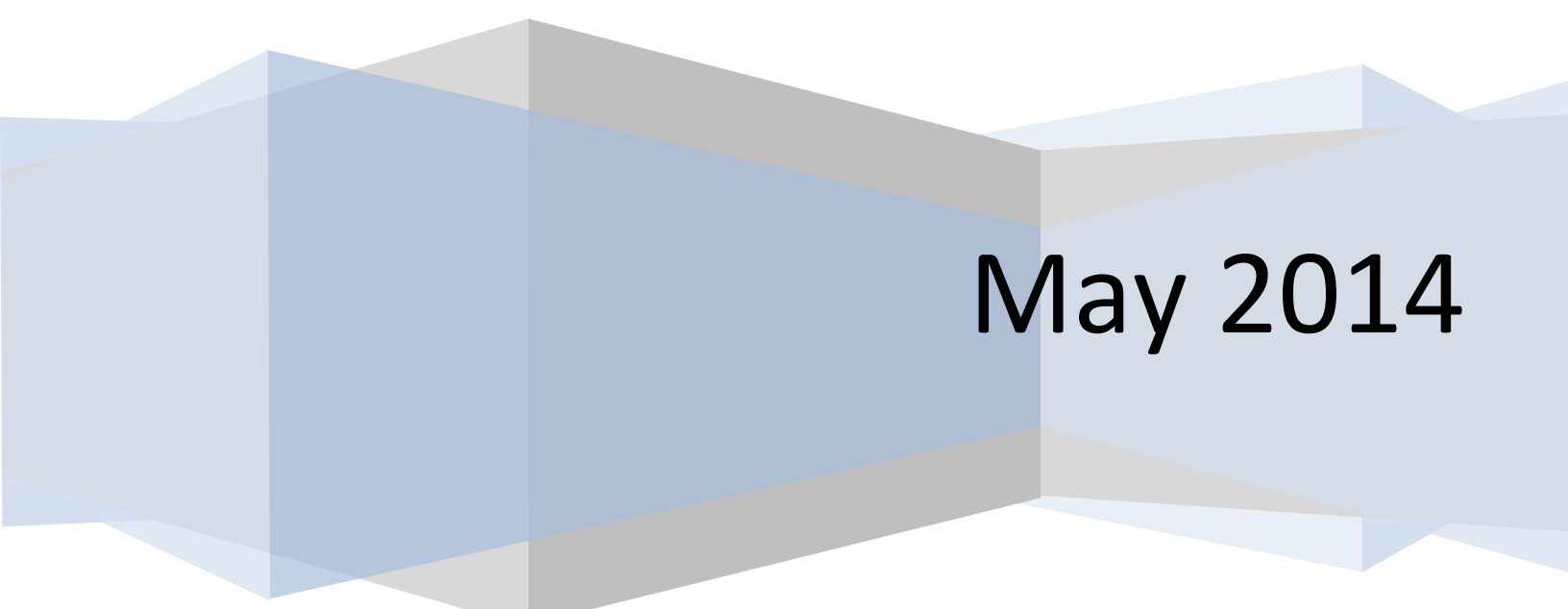
## Sponsor Portal and Induction Management System

**User Manual for Chapter Sponsors**

# May 2014

# Table of Contents

# Induction Management System

Welcome to the new Chapter Sponsor Portal with an online Induction Management System. This is a one-stop place to allow you as a chapter sponsor to work the National Office in the process of inducting new members.

Your adventure will start at https://myhonorsociety.com where you will be able to log into the system. The log-in is composed of the e-mail address that is on file with the National Office and a password. If you don't know your password or have never received one, then click the "Forgot Password" link, enter your e-mail address, and the system will generate and e-mail you a password. If you get an error message that reads, "The e-mail address you entered was not found in the database" then try a different e-mail address or contact the National Office to determine the e-mail address they have on file. Once you are logged in, you will be taken to the **Chapter Sponsor Portal**.
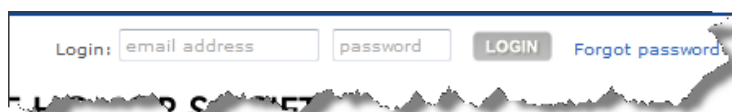
## IMS Workflow

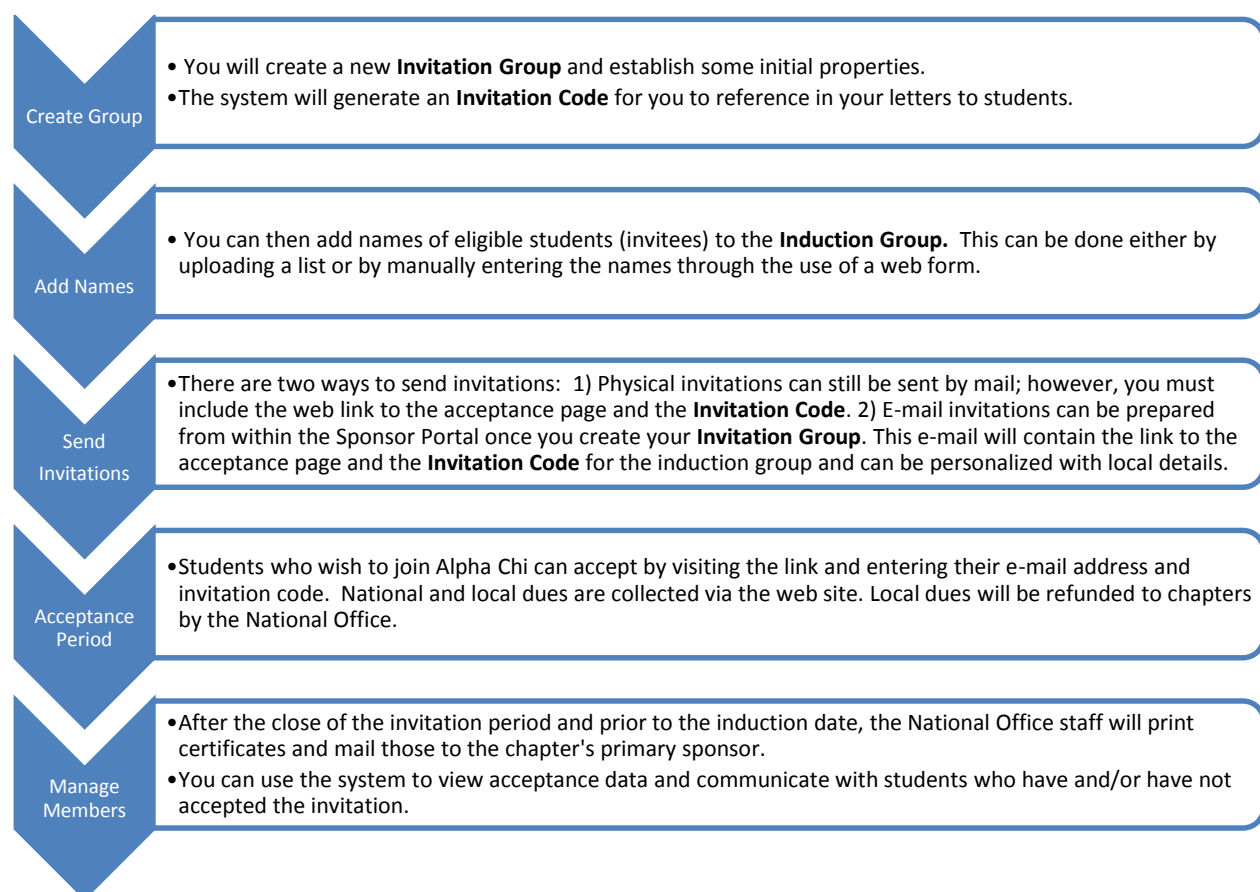While this system is designed to be as flexible as possible, there is a general workflow that it follows.

**Create Group**
- You will create a new **Invitation Group** and establish some initial properties.
- The system will generate an **Invitation Code** for you to reference in your letters to students.

**Add Names**
- You can then add names of eligible students (invitees) to the **Induction Group.** This can be done either by uploading a list or by manually entering the names through the use of a web form.

**Send Invitations**
- There are two ways to send invitations: 1) Physical invitations can still be sent by mail; however, you must include the web link to the acceptance page and the **Invitation Code**. 2) E-mail invitations can be prepared from within the Sponsor Portal once you create your **Invitation Group**. This e-mail will contain the link to the acceptance page and the **Invitation Code** for the induction group and can be personalized with local details.

**Acceptance Period**
- Students who wish to join Alpha Chi can accept by visiting the link and entering their e-mail address and invitation code. National and local dues are collected via the web site. Local dues will be refunded to chapters by the National Office.

**Manage Members**
- After the close of the invitation period and prior to the induction date, the National Office staff will print certificates and mail those to the chapter's primary sponsor.
- You can use the system to view acceptance data and communicate with students who have and/or have not accepted the invitation.

Besides the **Induction Management System,** the **Chapter Sponsor Portal** will be the place to request supplies, report and update chapter officers, register for conventions, and edit sponsor and other chapter contact information.

## General Navigation Information

Once you log in you will be redirected to your **Dashboard.** This is a "one-stop" overview of the current status of your Chapter. Along the left side of the screen you will find your main **Chapter Sponsor Portal Menu**.
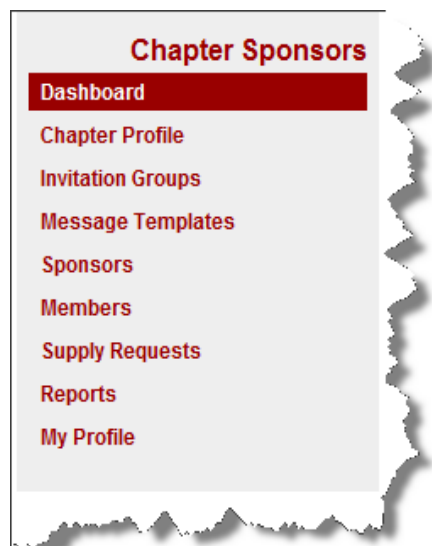
- Chapter Profile – Overview of information about your chapter, including addresses, phone numbers, and sponsors.
- Invitation Groups – Allows you to create and manage your groups of eligible students for induction.
- Message Templates – Allows you to create standard invitation and welcome messages for reuse.
- Sponsors – Allows you to edit other sponsor information for your chapter.
- Members – Allows you to find information about members of your chapter, both past and present.
- Supply Requests – Allows you to order supplies for your chapter.
- Reports – Allows you to create exportable lists of current members and alumni.
- My Profile – Allows you to edit your own address, phone number, and other account information.

Almost all of these areas have a data table that displays pertinent information, and all of the tables work similarly. We will look at one of these tables to get an idea of how they function. Each table includes several components.
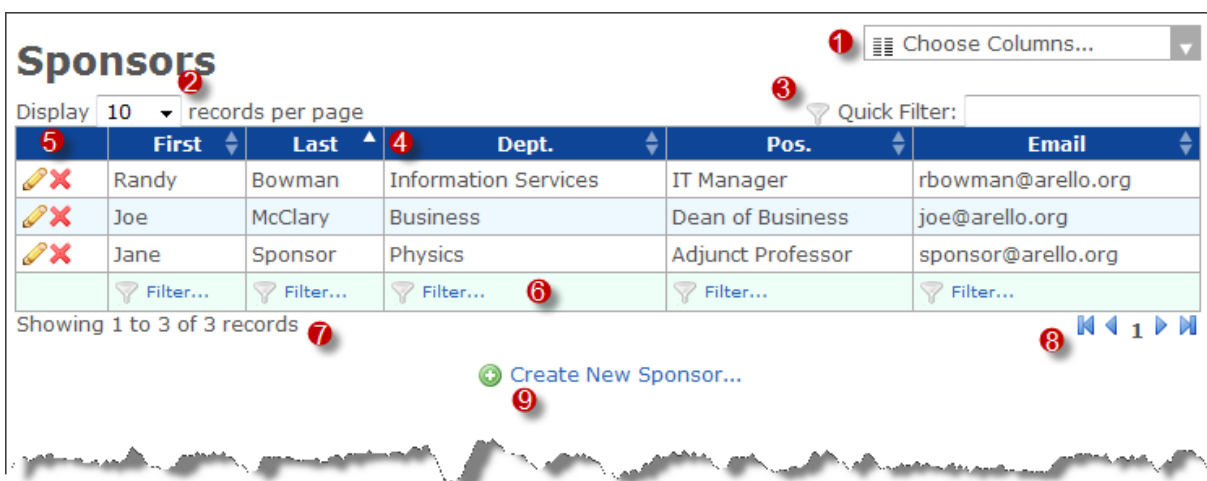
1. The **Column-Chooser** allows you to choose which columns of information appear in the table. Clicking the down arrow will display a list of available columns from which you can choose the ones you would like to view. Placing a check next to the column name makes that column appear in the table. Removing a check removes the column.
2. The **Rows-to-Display-Chooser**, a drop-down menu located directly below the file title, allows you to change the number of records that will appear in the table. You can use the drop-down menu to choose the number of records you wish to display per page. To browse from one page to another, you will use the **Page Controls** located below the table on the far right-hand side.
3. Located above the table at the far right side is the **Quick Filter**, which is an advanced search tool. This tool allows you to limit the records that display in the table. As you begin typing in the box, any data in *any* column that matches what you are typing will be displayed. So, for example, you are in the **Sponsors** table and need to edit the contact information for *Angie Smith*, an assistant sponsor. As you begin typing *Angie* into the box, the table will filter down to all records that contain *Angie*.
4. The header of the table contains up and down arrows for all columns that allow you to change the **Sort Order** of the column. At this time we only support sorting on one column at a time. A single white arrow in a field tells you how the data is currently being sorted.
5. The first column on the left-hand side of the table is your **Action Column**. This column will contain different icons that let you work with the data.

   **Common Actions**

   - Edit the details of the record. Depending on the record, this may just be a quick edit that gives you access to a limited number of data points you can edit.

   - Deletes the record

   **Specialized Actions**

   - Used in conjunction with the "Quick Edit" icon above, this one gives you access to all the data points for editing.

   - Import a prospective group for a file allows you to upload a file of names and e-mail address to create an Induction group.

   - Send an e-mail.
6. The footer of the table contains a **Filter** for each column. While the **Quick Filter** above filters for data in *any* column, this filters data only for this *specific* column.[1]
7. Under the table on the left-hand side you will see a record count and a message that tells you how many records you are viewing.
8. The right-hand side under the table contains your page navigation that lets you traverse through the records.

   - Jumps to the First Page of data

   - Goes back one page of data

   **#** - shows what page number you are currently viewing

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[1] Filtering can use a variety of very powerful operators to specify which data you want to view. These operators and how to use them are outlined in **Appendix A.**

> ▶ - Goes forward page of data
>
> ◀| - Jumps to the Last Page of data

9. Finally, every table has an icon that will allow you to add a new record. It will always be distinguished by the white plus sign in a green circle icon. ⊕

## Chapter Profile

One of the first things you will want to do after logging in is to check your Chapter Profile for accuracy. While every effort has been made to ensure the integrity of the data transferred into this new system, errors do occur. You will note that there are some pieces of information that you are allowed to edit, some you can edit that prompt a notification to the National Office staff, and some you are not allowed to modify. The Chapter Profile page is composed of three tabs: the **General** tab, the **Contact** tab, and the **Sponsors** tab.
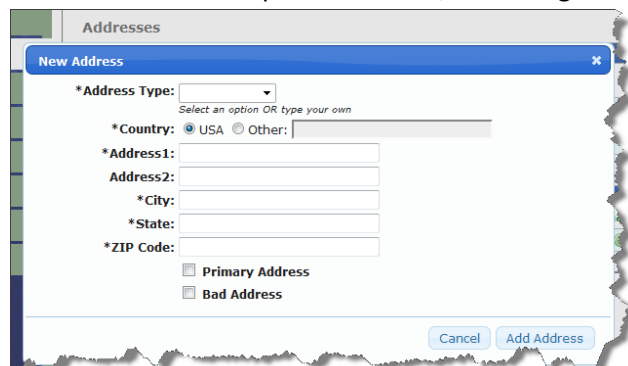
### Setting Your Chapter's Dues

The **General** tab allows you to edit information about your Chapter. One of the most important things to set on this tab is the **Local Chapter Dues** field, because this is used to calculate the total amount due when a student accepts his or her invitation. National dues will be automatically added to the amount you set as your Local Chapter Dues. If you forget to update this field when you alter your local dues, the system will collect the incorrect amount.[2]

During the first week of every month, for every new member registered the month before, the National Office will cut and mail a check to the college or chapter for the **Local Chapter Dues** portion. You will also need to set the payee for your Local Chapter Dues checks on the **General** tab.

The **Contact** tab allows you to add and edit addresses and phone numbers associated with the chapter. These may or may not be your own address and phone number. Your personal address and phone number can be edited in the **My Profile** area located at the bottom of the side menu bar.

To add an address or phone number, click the green button with a plus sign (⊕) located in the footer of



the display table. A new window will be overlaid for you to enter the appropriate information. An asterisk (*) indicates the field is required.

A chapter may have multiple addresses associated with it, but only one of those addresses can be the Primary address.

The **Sponsors** tab is where you can edit cosponsor and assistant sponsor data. You can

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[2] **Chapters that do not charge local dues must put a 0 in the Local Chapter Dues field. If your chapter or institution pays the *National* portion of the dues on behalf of all of your inductees, you must contact the National Office so they can configure that option for your chapter.** If you give scholarships to some students to cover local and national dues, please see the **Dues Bypass & Waiver** section later in this manual.

also edit other sponsors in the **Sponsors area** from the menu on the left-hand side of the page.

## Induction Management Walkthrough (Invitation Groups)

Once you have configured your Chapter Profile and established your local dues, you are now ready to create an invitation group by clicking on the **Invitation Groups** menu item. An invitation group is a set of students from your institution that meet eligibility requirements, as set forth by the National Office, that you would like to invite to join Alpha Chi. Once you assemble your list of prospective new members, you will click the **Create a New Invitation Group** link located below the data table of Invitation Groups.

This will take you to the **New Invitation Group** form where you will fill out some basic information.



**Name** – A "friendly" name for the invitation group is required. This is a way for you to quickly identify the group in the table. (Examples: Jan's Sp11 undergrads, Fall2010, Sumr2012 grads, Ind 4/22/11, etc.)

**Invitations Expire** – This is the date on which this particular invitation period will expire. In order for the National Office to have time to print and mail certificates and pins to you before your induction ceremony, there needs to be a cut-off after which prospective members cannot accept the invitation online. **Tip:** Unless you will be working on your induction program over the weekend, we suggest you set your expiration date on a Sunday instead of a Friday. This gives your invitees two more days to accept.

**Induction Date** – This is the planned date of your induction ceremony or the date by which you need your certificates and pins in hand. While it does not necessarily have to be completely accurate, this will be the date used by the National Office staff to meet the deadline of getting certificates printed and mailed in time for distribution on your campus.

**Invitation** – If you would like to use the Induction Management System to send out e-mail invitations to the prospective group, you can type your invitation message here. This is NOT required. Some chapters with just a few eligible students may opt to mail an invitation, while other chapters with many eligible students may opt to save time by using the e-mail feature. The system allows for personalization of the e-mail by using a technique similar to mail-merge found in most word processors.

You can personalize your invitation e-mail by adding variables that take on values specific to the recipient. [Note that the inserted information will appear exactly as it does in your imported table. So if your information is in all caps, it will appear in all caps in the final invitation.] Here's what you can use:

- **{name}** - The recipient's full name (first and last)

- **{first-name}** - The recipient's first name

- **{last-name}** - The recipient's last name

- **{e-mail}** - The recipient's e-mail address

- **{invitation-code}** - The group invitation code

- **{expiration-date}** - The invitation expiration date

- **{induction-date}** - The induction date

The variables must be entered exactly as they are written in bold above. Example:

Dear {first-name},

Congratulations! You are invited to join Alpha Chi.

So that we can have your membership materials prepared by the National Office in time for the induction ceremony, you have until {expiration-date} to accept this invitation.

**Please note that a link to accept the invitation online will be included automatically in all invitations.** The link will be inserted just after the text of your invitation.

**Welcome Message** – After the student accepts the invitation and pays her dues online, a **Welcome Message**, if one has been created, will be e-mailed to the student at the same time as her dues payment receipt. The **Welcome Message** is where you should put detailed information a new member would need to know, such as the exact time and instructions for attending the induction ceremony, how to RSVP for a banquet, etc. This message allows you to include only the most important information in the **Invitation**. Both the **Invitation** and the **Welcome Message** can benefit from the personalization commands mentioned earlier.

Your Welcome Message may need to be adjusted at various times throughout the process. What you want to say to a new member who registers before your Invitations Close date may differ from what needs to be said to someone registering after your induction ceremony has already taken place.

It is important that both your invitation and welcome message be customized for your chapter's local customs and procedures. The National Office will be glad to help fine-tune your messages. It will usually take them just a day or two to send suggestions back to you. You can also see the appendix for examples.
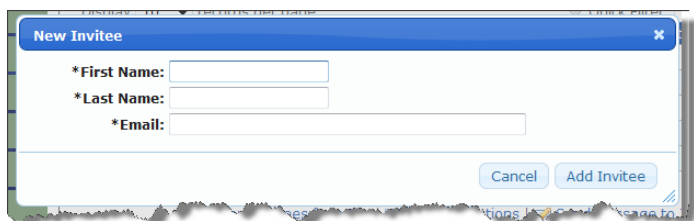
**Templates** – If you or the National Office have provided template messages, you can select the template from the drop-down and apply those saved, pre-built messages to either the **Invitation** or the **Welcome Message.** You may then edit the template as appropriate for this specific induction group.

Once you click the **Create Invitation Group**, the page will reload and a new tab labeled **Invitees** appears. Click on this tab to enter your list of prospective inductees. There are two ways to add prospective members—either by manually entering names one at a time or by uploading a file of names as a bulk entry. Once you have created the new group, you should see a box, outlined in red, which contains the unique **Invitation Code** for this new group.

## Manual Data Entry of Invitees

To enter the names one at a time, click the **Add Invitee** button located in the data footer. A form will appear in the middle of your screen for you to enter the three required pieces of information.

A first name, a last name, and an e-mail address are required to enter a new invitee. Even if you don't send an invitation through e-mail, an e-mail address is required as part of the online student acceptance process.



Click the **Add Invitee** button to add the student to the prospective group.
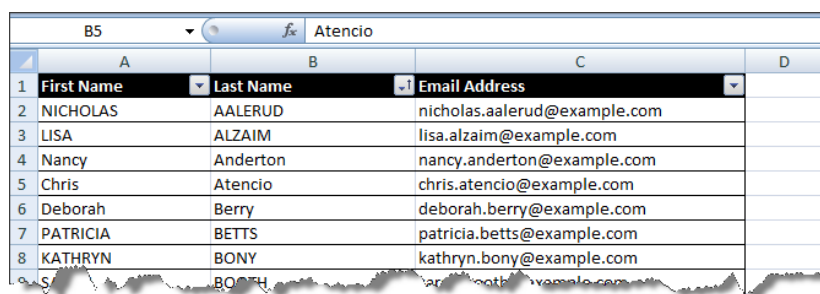
**NOTE:  The invitees' names will appear exactly as they are entered. If you enter first names followed by middle initials, that is what will appear when you personalize your IMS invitation. Therefore, we suggest mixed cased and no middle names or initials in your list of invitees (whether by manual entry or file upload).**

## Bulk Data Entry of Invitees from a File

To take advantage of the most efficient data entry feature of the Induction Management System, you simply upload a group or batch of names directly to the Induction Group. Because of the variety of administrative systems that may be used at a college or university, the file format for the upload is flexible. The system can accept CSV, fixed-width text files, or Excel (xls or xlsx) files.

### Excel Files
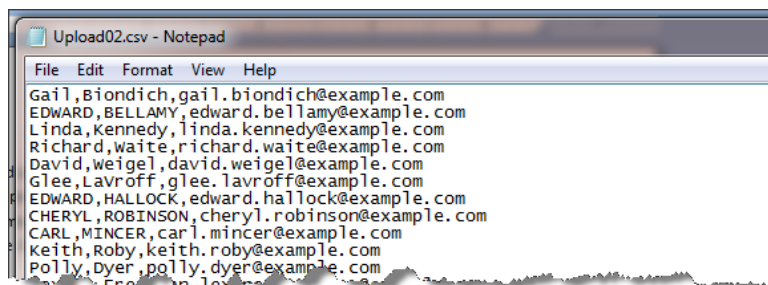
The file needs to contain a single row of data for each student you wish to invite. You need to include the first name, last name, and e-mail address of the student. The order of the fields is immaterial. You may include headers if you wish, but they are not required.



### Delimited Text Files (CSV, TXT)

The file needs to contain a single row of data for each student you wish to invite. You need to include the first name, last name, and e-mail address of the student. The order of the fields is immaterial. Each field must be 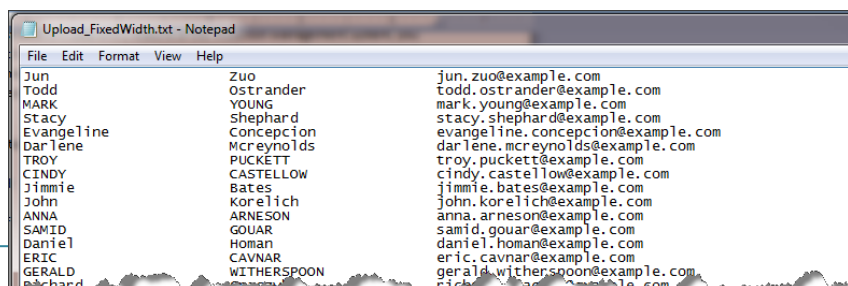delimited, but which delimiter you use is immaterial. You may qualify your fields if you wish to, but that is not required. Headers are optional as well.



The system is "smart" and reads your file to "guess" which qualifier and delimiters are being used. Before processing, it displays these guesses and allows you to make any modifications.

### Fixed Width Files

The file needs to contain a single row of data for each student you wish to invite. You need to include the first name,
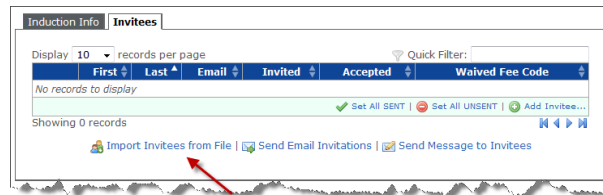
last name, and e-mail address of the student. The order of the fields is immaterial. You will be able to set the set the field lengths used after you upload the file to ensure that the fields start and stop at the appropriate intervals.

Once you have your bulk file prepared, you can upload it from the **Invitees** tab by clicking the **Import Invitees from File** link.



This will take you to the page where you can select your file and upload it. Press the **Browse** button to open up an "Open File" dialog box and browse your computer for your prepared file.

Once the file has been located, click the **Upload** button to send the file to the system for processing. The system will read the file and attempt to "guess" the format and prepare a preview of the data import. You will have the opportunity to make changes to any of the settings prior to importing the data. The settings available will be dependent upon what kind of file you have uploaded.

### Excel Files
If you uploaded a Microsoft Excel file, then you will get a choice to tell the system which worksheet in the file contains the data (probably Sheet 1).



You will be able to set which row to begin the import. If you included Headers in row 1, then you would most likely start the import in row 2. If you didn't include headers, then you will probably start the import in row 1.

### Delimited Text Files (CSV, TXT)
The delimited text file upload has a few more options for you to consider. The system will already have read your file and attempted to guess at the correct specifications. But, if it got any of them wrong, you will be able to change them prior to the import.



**Delimiter** – This is the character used to separate one data field from another.
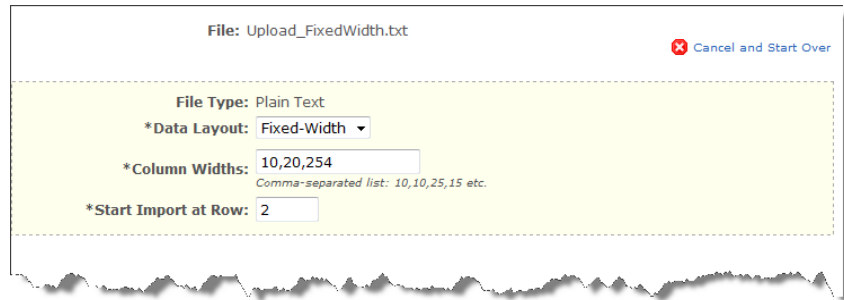
**Qualifier** – This is the character used to differentiate your field data from your delimiter. If a qualifier exists, most generally it will be either a single-quote (') or a double-quote (").

**Start Import at Row** – Allows you to set at which row to begin the import. If you included headers, then you would most likely start the import in row 2. If you didn't include headers, then you would probably start the import in row 1.

## Fixed Width Files

If your file is a fixed-width file, then you will need to tell the system how many characters long each field is. You do this by typing in the width of each column in your file and separating that by a comma.

So, in the example here, the first name is 10 characters long, at which point, the last name starts. It is 20 characters long. Finally, e-mail address is 254 characters long.
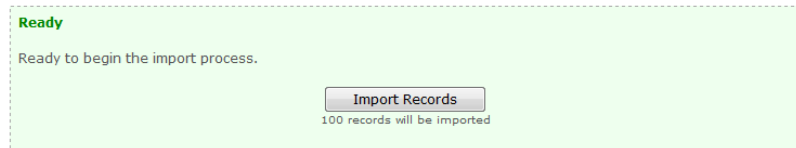
As you configure the appropriate settings, the system will show you a 10-record preview of how it plans to import the data. You can use the drop-down boxes located above each field to designate what kind of data is contained by that field. When all the appropriate settings are set and all three required fields have been designated, a green **Ready** box will appear with the **Import Records** button. Clicking that button will add the contents of the file to the invitee group.

If there are any problems with your configuration, then the system will not display the green box but instead will display a red error box that informs you of the errors needing to be resolved.

Once you have entered your invitees, you will be able to send your invitations. If you choose, you can have the system send an e-mail invitation. A system e-mail invitation will automatically include the directions for students to accept the invitation and the invitation code.

**SECURITY NOTE:** Even if a student found another person's invitation, he could not use it to steal the invitation as his own. The IMS will block any student whose name and e-mail address have not been uploaded or entered into the Invitation Group. If a student was able to accurately guess the invitee's e-mail address, he could only succeed in registering and paying dues for the original invitee, not himself.

### Sending IMS Electronic Invitations

If you choose to have the system e-mail[3] your invitations, simply click the **Send Email Invitations** icon ( ) located in either the Invitation Groups dashboard or under the Invitees data table on the Invitees tab. This will take you to the page that allows you to **Preview** the invitations. The preview page tells you how many e-mails you are about to send and lets you see how the merge worked. You can use the page navigation control located at the bottom of the page to preview each e-mail.



If you used a Personalization Code to have the student names merged into your e-mail, you should see a student's name in the Preview.  If you see the code instead of an actual name in the Preview, you have entered the code improperly. Hit Cancel to go back and edit your invitation message. When you are ready to send your invitations, just click the **Send Invitations** button.
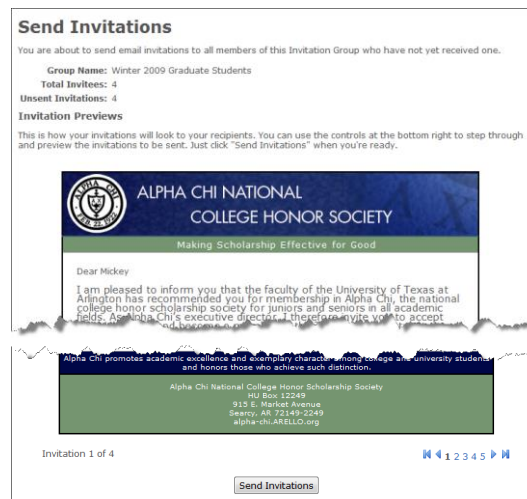
### Adding More Invitees to an Invitation Group

Sometimes a sponsor will learn of one or more eligible students after the main group of invitations has already been sent. You do not have to create a new Invitation Group for these students.

To manually add subsequent invitees to your current Invitation Group, simply click the **Add Invitee** button immediately below the table of invitees. This allows you to manually enter the three fields of data for one or more late invitees.
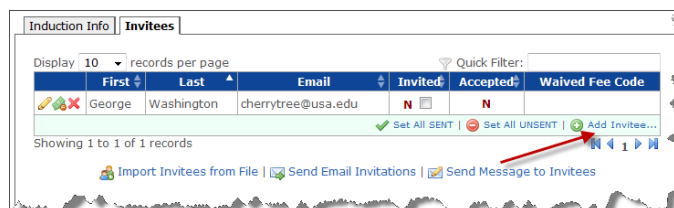


After adding each new invitee, you will be taken back to the Invitees tab where you may notice that these new invitees do not have a check in the Invited column. Simply click the **Send Email Invitations** button at the bottom of the screen to have your original invitation sent to these "late" invitees.

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[3] Refer to **Appendix B** for methods to ensure that your email invitations are not caught by institutions' anti-spam systems.

Note:  Your Invitations Close date may need to be adjusted some to give these later invitees time to accept the invitation. That can be done on the Induction Info tab.

## Ad hoc Communications (Invitation Deadline Reminders, Information Changes, etc.)

Besides sending invitation and welcome e-mails, you can use the system to communicate with a) all the invitees, b) those invitees who have accepted the invitation, or c) those invitees who have not yet accepted an invitation.



From the **Invitation Groups** tab, click on the name of the group containing the students you wish to message. Then go to the **Invitees** tab. Under the list of invitees, there is a text link to the right that reads **Send Message to Invitees**. This will take you to the **Invitee Message** creation page.

**Invitation Group**:  Choose the invitation group to whom you wish to send a message.

**Send To**:  Choose the sub-group(s) of invitees with whom you wish to communicate.

**BCC**:  You may enter e-mail addresses for people who should receive a blind carbon copy of the e-mail.

**Subject**:  Enter a subject for the e-mail.

**Message**:  Type your message. You can use the same **Personalization** techniques you used in the invitation e-mail in the body of this message. If you are sending an invitation reminder message, be sure to copy and paste the **Acceptance Instructions** into the body of your message. This way the invitee can proceed directly from your reminder to online registration. Then preview your message and make any needed changes. Once you are happy with your message, click the **Send Message** button.

## Bypassing or Waiving Dues Payment

In some instances a sponsor may opt to waive or "scholarship" the dues for a student to whom the dues present a financial hardship. You may also have a student who needs to bypass the online payment section to pay his or her dues with cash, personal check, or money order. When this occurs, the local chapter is still responsible for ensuring that the National Office receives its portion of the dues. Since the National Office does not wish to receive personal checks or cash from invitees, a sponsor can pay the national portion of the dues using a personal or school credit card, or the sponsor can simply opt to have the national portion of the bypassed dues deducted from the chapter's next reimbursement of local dues.

To waive or bypass the dues for a student, click the **Dues-Bypass** icon in the **Invitees** tab of the **Invitation Group**

page. A confirmation box will appear to inform you that you'll still be required to pay the National Dues. When you click **OK**, the system will send an e-mail to the student that contains a single-use, dues-bypass code that they will be able to use to bypass the payment section during the acceptance process.

When the invitation period closes, a notification will appear on your Dashboard that it is time to designate the method you will be using to pay the National Dues (either by deduction from the next local dues reimbursement or by credit card). This will need to be done before the National Office can print certificates for this Invitation Group.

### Certificate Reprints

Since members will be filling out their own contact information and will have access to their own "Member Portal" as soon as they pay dues, they will be responsible for and able to order their own reprints. However, if a certificate is received from the National Office damaged in some other way and you wish to request it be reprinted for the student, simply contact the office for a new certificate.

### Late Registrations

Late Registration policy is set at the National Office Level.  There are currently four models that might be encountered:

a)  Late Registrations are not accepted and the IMS will stop accepting registrations at 11:59 PM of the date set by the Sponsor as the **Invitation Expiration Date**.
b)  Late Registrations are accepted for an invitation group until a new invitation group is created.
c)  Late Registrations are accepted for a fixed number of days after the **Invitation Expiration Date**.  This number is set by the National Office staff.
d)  Invitations never expire.

## Invitee Questions

The system allows you to poll incoming members with Invitee Questions by using this module to define a set of questions to be asked to invitees during the acceptance process and then to view the response data, both as individual responses, and as aggregate information.

You can use this feature to collect all kinds of information from your new members. Here are a few ideas:

- Collect sizes for new member t-shirt orders
- RSVPs for the induction ceremony or reception
- Ask students to express interest in officer positions
- Poll students as to what parts of your chapter's publicity initiatives are particularly effective

The **Invitee Questions page** is where you can add or edit your invitee questions. Note that these questions will be presented to every registering member for every invitation group.

# Invitee Questions

Use this page to define a set of questions to be asked to invitees during the acceptance process and view the response data.

| Questions | Responses by Question | Responses by Invitee |

As a chapter sponsor, questions you create will only be asked to students accepting membership into your chapter. **Your questions will be asked in addition to all National Office questions,** and you can access all the data through reports. All National Office questions are shown in the table below so you can avoid duplicates.

Display  10  ▼  records per page                                               ⛋ Quick Filter: [          ]

|  | Created By | Field Name | Question | Type | Choices | Required | Comments | Sort▲ |
|---|---|---|---|---|---|---|---|---|
| 🔍✏️⊖ | Local Chapter | No. at Reception | How many guests will you be bringing to the reception (including yourself)? | Integer | | **Yes** | **No** | 1 |
| 🔍✏️⊖ | Local Chapter | Meal | Which meal would you prefer? (You can indicate any dietary restrictions in the comments section). | Multiple Choice: Radio | Filet Mignon, Peking Duck, Beef Wellington, Coq au Vin, Vegetarian Plate | **Yes** | **Yes** | 2 |
| | | | | | | | ⊕ Add Question... | |

Showing 1 to 2 of 2 records                                                    ⏮ ◀ 1 ▶ ⏭

## Add a New Question

To add a question, click Add Question at the bottom of the Questions table and then complete the information in the New Question window:



**Question** - The actual text of the question, as it will be presented to your incoming members

**Field Name** - A short description referring to the responses to this question. If your question were, for instance, "What size chapter shirt would you like to order?" this field might be "T-shirt size." This is the name that will be displayed as a column header when you review the data.

**Data Type** - Select the appropriate data type for your question's responses.

- **Yes/No** - allows the student to answer "Yes" or "No" (e.g., "Are you interested in becoming a chapter officer?")
- **Integer** - allows the student to answer with a whole number (e.g., "How many guests will you be bringing to the induction ceremony?")
- **Decimal** - allows the student to answer with a decimal number (e.g., "What's your expected GPA at the end of this term?")
- **Date/Time** - provides the student with a date-picker; allows the student to respond with a date and time (e.g., "When would be a good time for us to contact you about your upcoming induction?")

- **Short Text** - allows the student to answer with a short line of text (e.g., "What's your favorite professor's name?")
- **Long Text** - allows the student to answer with a long block of unformatted text (e.g., "Why did you choose to join our honor society?")
- **Rich Text** - allows the student to answer with a long block of formattable text (e.g., "Tell us about yourself...")
- **Multiple Choice: Radio** - allows the student to select *only one* option from a list of buttons (e.g., "In which of these officers' positions would you be most interested?")
- **Multiple Choice: Select** - allows the student to select *only one* option from a drop-down menu (e.g., "What size t-shirt would you like to order?")
- **Multiple Choice: Checkboxes** - allows the student to select *multiple* options from a list of buttons (e.g., "How did you hear about our honor society?  Click all that apply:")

**Choices** - Input the available choices for multiple-choice questions. Using the t-shirt example from above, your choices might be "Small," "Medium," "Large," and "XL" Note: This area will only appear if the Data Type is set to one of the multiple-choice options.

**Show Comments** - If this box is checked, new members will be allowed to enter comments on the question.

**Sort** - Sets the order in which questions will be presented to incoming members. Lower-numbered questions will be asked first.

**Answer Required** - If this box is checked, new members will not be allowed to join without answering this question.

Once you're satisfied that you've set up you question correctly, click on the **Add Question** button to save it.

## Review Member Responses
You can look at the member responses to your questions and to National Office's questions, presented in two different ways: by question and by invitee.

Viewing responses by question will present you with all of the members' answers to a single question in one look. This is good for aggregating responses like t-shirt orders and induction dinner menu items.

Viewing responses by invitee will show you all of one member's responses to all of your questions. This is good for looking at an individual's interests such as, officer interest or the reasons for joining.

## View the Responses by Question
In the Invitee Questions module, you can click on the **Responses by Question** tab to view the results.

**Question** - Select the question for which you'd like to view the responses

**Invitation Group** -Select the Group for which you'd like to view the responses

**Dates** - Enter the dates for which you'd like data. Leave the fields blank to review all data.  After entering the correct dates, click the Set Dates button

Your data will be presented in two ways: in a table and with a chart. You may navigate through the tabular data using the controls as described earlier.

You may also export the results to view and work with in a spreadsheet program. Simply click on the Export to CSV or Export to XML link to download a spreadsheet file containing all of the responses that the system has collected.

- CSV files can be easily opened by most major spreadsheet applications, including Excel. This is the file type you'll use almost all of the time.
- XML files use a special markup language that many programs can use to customize content in documents, online, and in other locations. Most users will only use this file type for development of web applications or special scripts.

### View the Responses by Invitee
Clicking the **Responses by Invitee** tab will allow you to view all the answers to the entire set of questions.

You can filter the data either to a single **Invitation Group** or to a single **Invitee** by choosing the appropriate choices from the drop-down lists.

## Offering Invitee Items for Sale

If your national office has enabled this feature, you can offer a number of items for sale to invitees during the acceptance process.  This is a great place to offer things like:

- Society merchandise (shirts, hats, mugs, etc.)
- Guest tickets to an induction ceremony, if they cost extra
- Option to join a related society

### Managing Items for Sale

To get started, visit the **Invitee Items for Sale** page and add your items.  The first few fields are fairly self-explanatory (name, description, amount).

Use the **Expires** field if you want the item to expire and be unavailable for purchase after a certain date.

Use the **Comments** option if you need to collect extra information about an item.  For example, if you are selling shirts and need to collect shirt sizes, you can use comments to ask for size information.  The "Short" option will display a short, single-line text box, and the "Long" option will display a multi-line text area.  Use the **Comments Prompt** to prompt your students as to what information you need.  In the shirt example, you might use "Shirt size(s):" as the comments prompt.  Keep in mind the student may purchase more than one of the item, so make sure your comments area allows for enough room.

Use the **Sort Order** field if you have multiple items for sale and want to control the order in which they appear.  You can use decimals.

The **Display** checkbox is checked by default. You can uncheck this box if you want to prevent an item from appearing for sale (perhaps you ran out).

Check the **Shipping Required** checkbox if this is a physical item that requires shipping (or fulfillment in some other way). Items that are set as shipping required will appear on your dashboard when purchased, and you will be able to track fulfillment of these items. Items that are NOT set as shipping required will not appear on your dashboard because they do not require fulfillment on your part. A physical item such as a baseball cap should be set as Shipping Required because once purchased, you need to get the item to the student in some way. An item such as a membership in a related society does not need fulfillment *unless* perhaps you need to send a physical certificate to the student.

Use the **Max. Quantity** field to specify a maximum quantity of this item that *each student* may order. For example, if you offer membership in a related society, you probably only want your students to order one of those, so set the Max. Quantity to 1.

Advanced users: use the **Extended Field Link** to populate a Member Extended Field if this item is purchased. An example of where this might be useful is: if your society offers a membership in a related society for a fee and tracks that membership as a Member Extended Field, you can use this feature to automatically populate that field if the item is purchased. Only Member Extended Fields with Sponsor write permissions will be displayed as options; contact the national office if you don't see an extended field as an option that you think should be there.

## Acceptance "Shopping Cart"
When a student accepts, if your chapter has any items for sale, they are displayed in a "shopping cart" style format, and the student has the option to add items to the "cart." The student pays for any invitee items purchased along with the dues in one payment at the end of the acceptance. The national office will reimburse you for any invitee items purchased with your local dues reimbursement check. If your chapter is set up to pay all dues on behalf of students, the national office may deduct any invitee items purchased from your invoice for national dues.

## Sponsor Dashboard: Items Pending Fulfillment
As items which require fulfillment ("Shipping Required" checked) are purchased, you will see them appear on your Sponsor Dashboard in the Invitee Items Pending Fulfillment table. This table includes the name of the item purchased, comments, the quantity purchased and the student's address. Once you fulfill an item, click the green check mark icon next to it to mark it fulfilled, and it will disappear from the dashboard.

## Invitee Items Purchased (History)
If you visit the **Invitee Items Purchased** page, you can view a complete history of your invitee items. This table includes ALL items—those which do not require any fulfillment and those which have been marked fulfilled. You can mark items fulfilled on this page or reset fulfilled items to "unfulfilled" if you made a mistake.

## Maintaining Your Chapter Contacts

Besides allowing you to manage your Invitation Groups, the Chapter Sponsor Portal also allows you to manage the sponsors and contacts associated with your chapter. We ask that you keep the name and address of your university's president up-to-date there, as well.

### Add a New Sponsor

If you would like to add an additional sponsor, click the **Create New Sponsor** link and complete the form. After completing the form, the National Office will be notified that a new sponsor has been added to your Chapter.

**Title** – This is the honorific title that might be associated with a person's names, such as, Dr., Mr., Ms., et. al. This is not the person's position at the institution.

**First Name** – The sponsor's first name

**Middle Name** – The sponsor's middle name

**Last Name** – The sponsor's last name

**Suffix** – Any honorifics that need to be associated with the sponsor's name that provides additional information about the sponsor.

**Department** – The department in which the sponsor is employed at the institution.

**Position** – The position of the sponsor at the institution.

**Send Mailings** – If this sponsor should receive mailings, check the box.

**E-mail** – The sponsor's e-mail address

**Password** – This is an initial password that you can set for the new sponsor so that he or she can access the Sponsor Portal. The sponsor will be required to change this initial password after logging in the first time.

After clicking the **Create Sponsor** button, the initial data will be saved, and the page will change to an **Edit Sponsor** page where you can add contact information.

### Edit a Sponsor

The **Edit Sponsor** form is very similar to the **Add Sponsor** form. However, there is an additional tab labeled **Contact** that you can use to add addresses and phone numbers to the sponsor. This operates like the address and phone number sections of the Chapter Profile.

## Change the Primary Sponsor/Liaison

While many Chapters have co-sponsors that share responsibility for the administration of the local Chapter, this system requires and only allows for one of the sponsors to be the Primary Liaison with the National Office.  However, this information can be changed at any time.

Simply ensure that the sponsor who you wish to make the new Primary Liaison has been added to the Chapter Contacts. Then click on **Chapter Profile,** choose the new person from the drop-down list labeled **Primary Liaison,** and click the **Save General Info** button. The National Office will be notified of any changes to this field.

**The Primary Liaison MUST have a Primary Address, e-mail address, telephone number, and must have at least one address that is designated as a *Mailing Address*.**

## Members

This area allows you to find information about members of your chapter, both past and present. Simply use the data table to filter down or find the member and click the **View Details** (🔍) icon to see the member's record. See Appendix A for searching parameters. You can also use the Reports tab to pull various membership lists and reports into Excel spreadsheets for chapter use.

## Requests for Chapter Supplies

The final section of the Chapter Portal is the area that allows you to request supplies from the National Office.

You will notice that the **Request for Supplies** area is composed of three tabs:

- New Request Tab – allows you to create and submit a supply request to the National Office.
- Pending Request Tab – allows you to see a supply request that has been submitted, but has not yet been fulfilled by the National Office.
- Fulfilled request – allows you to see your history of supply requests already shipped by the National Office.

## Creating a Supply Request

While on the **New Request** tab, simply add a line item for each supply that you need.

In the **Quantity** field enter the number of this item that you need.

The **Item** drop-down box lists the different supplies you can request.  Choose the item you are out of that needs to be restocked. If a fee is associated the other fields will be updated as appropriate.

Click the **Add Another Item** in the footer of

the table to request an additional supply item.

If you need the supplies very quickly, you can change the **Shipping** method here. Express shipments have corresponding charges.

Enter in a **Requested Delivery Date** and any **Special Instructions**.

Click the **Continue Button** to review your request and supply any shipping or billing information as necessary.

After completing the process, the National Office is notified of a Supply Request and will fulfill the order.

## Members Paying with Cash or Check

If the national office has enabled the option, you will see a link in your Chapter Portal to **Add Member Paying with Cash/Check.** You can use this option to process a member acceptance when he/she does not wish to pay by credit card, and instead wishes to pay you directly.

On this page, you will see a box to select an eligible student. A student is eligible for cash/check acceptance if he/she meets the following requirements:

- The student must be a member of an open invitation group. An open invitation group is one which has not yet expired in accordance with the late acceptance policy (in other words, the student must still be able to accept the invitation through the "normal" process).
- The student must have been invited but not yet accepted the invitation.

Once you select a student to process, you'll fill out information about the student accepting or, if the student is with you paying dues, you can allow the student to fill in the information for himself/herself. You'll be presented with two options: Quick Acceptance and Full Acceptance.

Complete the **Quick Acceptance** form if you only know or only wish to enter bare minimum information about the student. You are only required to provide a first and last name, email address, name for certificate printing and expected graduation date. You must also respond to any required invitee questions. This type of acceptance is designed to save you time.

Complete the **Full Acceptance** form if you would like to see all possible information, such as all name fields, address and phone number fields, and invitee items for sale. For each invitee item for sale that requires fulfillment, you will have the option to go ahead and mark it fulfilled, preventing it from appearing on your dashboard. This is a good option to use if the student is with you and you are handing him/her the purchased items at the time of the acceptance.

Keep in mind that **you will owe national dues for students paying with cash or check.** Cash/check acceptances are treated like dues waivers. Depending on the option you have chosen for the invitation group, this amount may be deducted from your local dues reimbursement check or you may pay it by credit card. If you have selected the Deduct option and your local dues collection is insufficient to cover this payment, you will be billed for the overage.
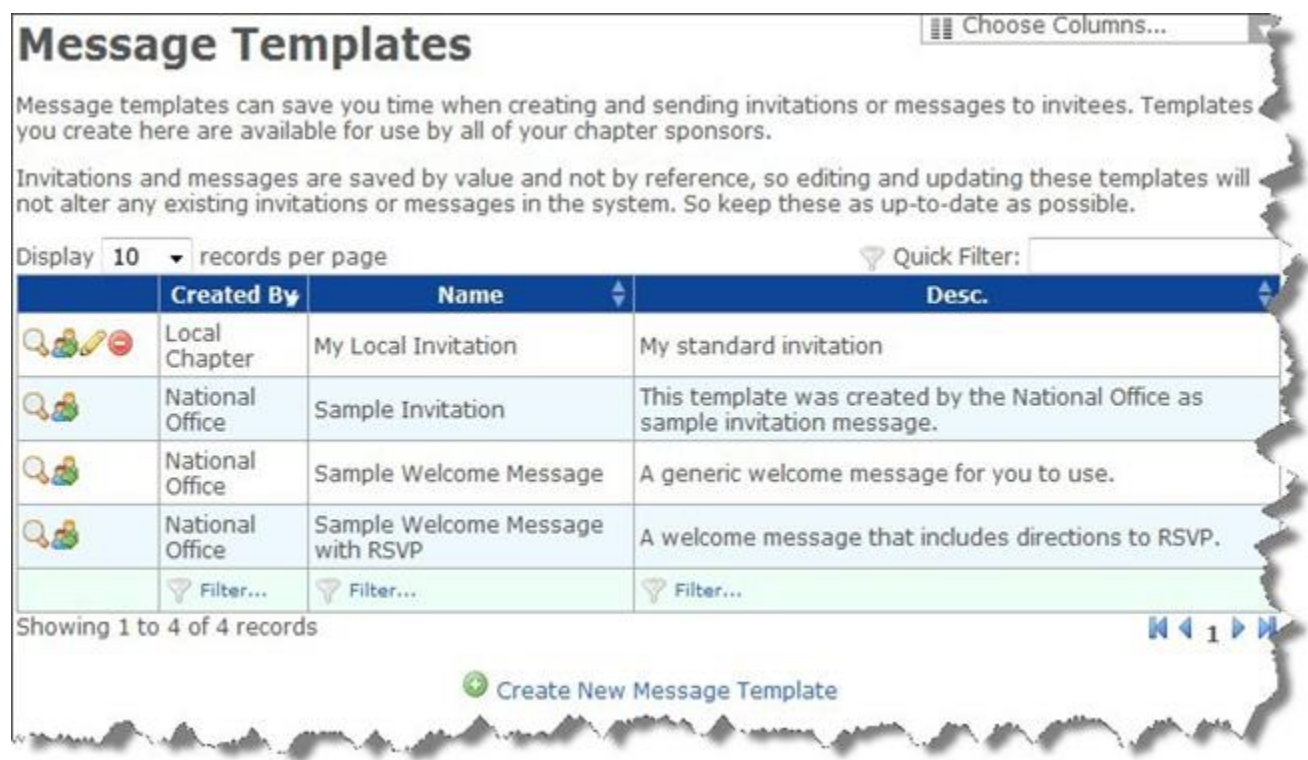
At the bottom of the form, you'll be presented with a total amount due. It is your responsibility to collect a cash or check payment from the student for the correct amount.

Once you've filled in all information, click the Process Acceptance button, and you're done. The student will receive a welcome email and receipt for payment which indicates he/she paid by 'Cash/check'.

## Message Templates

Using the Message Templates feature can save you a lot of time and energy. Instead of rewriting a message each time you want to send it, you can save that message as a Template, and edit it as necessary for multiple messages.

Your National Office may have created and saved a few templates for you to work with; you can also create and save as many templates as you like, and they will be specific to your chapter.



To create a new template message, click on the **Create a New Message Template** link at the bottom of the page. This will take you to the Message editor page.

**Name** - The name for your template: "Long Invitation Letter" or "Short Reminder Message," etc.

**Description** - A short description of your template: "A short invitation letter for the fall undergrads," or "Last-minute reminder message for invitees"

**Message Text** - Enter the text of your template message. You can use the Personalization codes in your template.

Once you're satisfied with your Message Template, click on the **Save Template** button. The template will now appear in your chapter's list of templates, and can be used in Invitation, Welcome, and Ad-hoc messages.

To **edit** a template your chapter has created, click the Edit icon next to the template you wish to edit in the Message Templates table.

To **delete** a template your chapter has created, click the red Delete Record icon next to the template you wish to delete.

*Note: You won't be able to delete or edit the templates created by National Office. You will, however, be permitted to customize these templates in the Invitation and Invitee Message windows when you're actually using the templates to create a message.*

## Issue Notification Process

While every effort has been made to ensure that this system will run smoothly and efficiently, issues will arise.  When this happens, please try to record any error messages that were displayed and document what task you were trying to complete. Then contact the National Office for initial technical support.

If a student has a registration problem that you're unable to solve, ask them to call the National Office from the computer from which they are trying to register.

If the issue cannot be resolved by the staff at the National Office, they will contact the vendor for support. The vendor will then contact the chapter sponsor and work directly with the user via the most reasonable means to resolve the issues.

## Appendix A:  Filter Operators

Using operators to filter the data in the data tables can allow you to quickly pinpoint specific members.

| Syntax | Means |
|---|---|
| expression | like '%expression%' |
| =expression | exactly equals 'expression' |
| !=expression | does not equal 'expression' |
| >expression | greater than 'expression' |
| >=expression | greater than or equal to 'expression' |
| <=expression | less than or equal to 'expression' |
| <expression | less than 'expression' |
| in(exp1,exp2) | in the list 'exp1,exp2' |
| !in(exp1,exp2) | not in the list 'exp1,exp2' |
| =NULL | is NULL or blank |
| !=NULL | is not NULL or blank |
| num1-num2 | between num1 and num2, inclusive |
| date1-date2 | between date1 and date2, inclusive |

**Notes:**

- No qualifiers (no single quotes) should be used.

- Valid date delimiters are '/' and '.' (no '-' because that's the range operator).

- Whitespace is generally ignored within operators: '! in (1,2,3)' works as well as '! in(1,2,3)' and '!in (1, 2, 3)'.

- Whitespace is maintained within string expressions though, so that 'Region V' is different than 'RegionV'.

- Operators should not be used for Boolean data types. Entering 1, Y, or T (case-insensitive) evaluates to true, and 0, N, F evaluate to false.

## Appendix B:  Considerations to Ensure E-mail Delivery

If you will be using institution-provided e-mail addresses for the students you are inviting, you may need to work with your college's IT staff to ensure that e-mail invitations are not treated as spam. Many institutions employ institution-wide spam protection to prevent seemingly unwanted messages from being sent to faculty, staff, and students. While every effort has been made to ensure that our e-mail invitations do not appear as spam, some spam protection systems may still categorize the messages as spam.

All email generated by MHS comes from the email address **no-reply@myhonorsociety.com** and the IP address **65.182.212.242**. You should ask your IT department to "whitelist" these addresses to help ensure your invitations reach your students.

Do not assume that your institution's Information Technology Services will not be blocking your IMS invitations. We suggest you contact them as soon as possible with the information above to make sure that your students will receive all your messages.