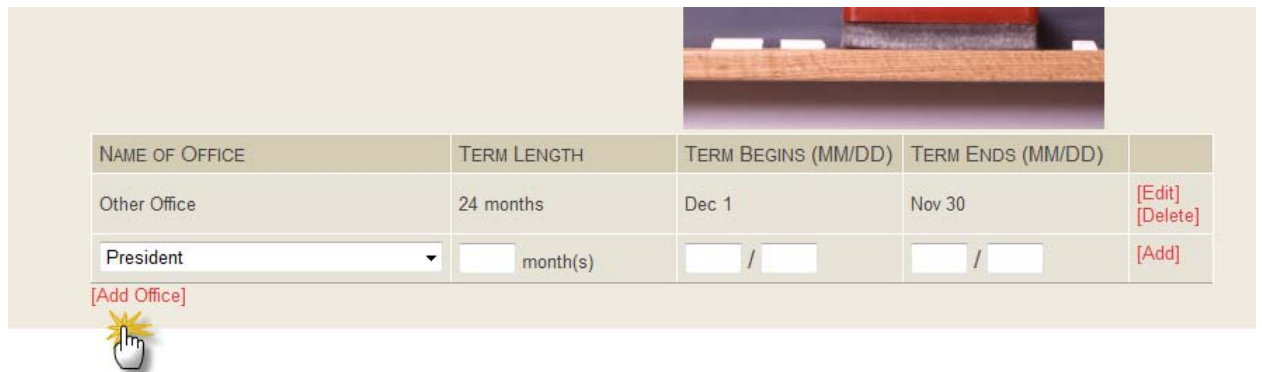


Add an Officer To OMDRplus

- 1) Log into your administrative side of your account.
- 2) *Make sure the person you want to add as an officer is in the Just Between Friends system. See information at www.learnjbf.com to learn how to add members.*
- 3) Click on your <Run My PTA/OMDRplus> tab.
- 4) Click on My PTA and then the red link: Offices and Terms
- 5) Confirm that your office exists for your new officer
 - a) If it does not add the office by following the steps listed below:
Log into your administrative side.
 - i) Click on your <Run My PTA/OMDRplus> tab
 - ii) Click on <My PTA Tab>
 - iii) Then click the red words: **Office and Terms**
 - iv) Click on the red words: **Add Office**. You should see a returned view like this:

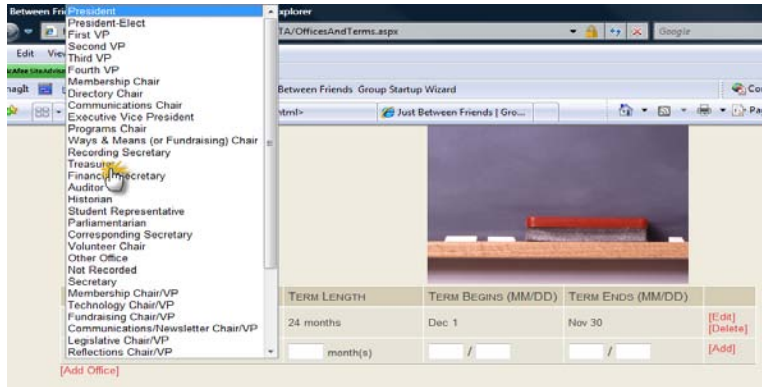


NAME OF OFFICE	TERM LENGTH	TERM BEGINS (MM/DD)	TERM ENDS (MM/DD)	
Other Office	24 months	Dec 1	Nov 30	[Edit] [Delete]
President	month(s)	/	/	[Add]

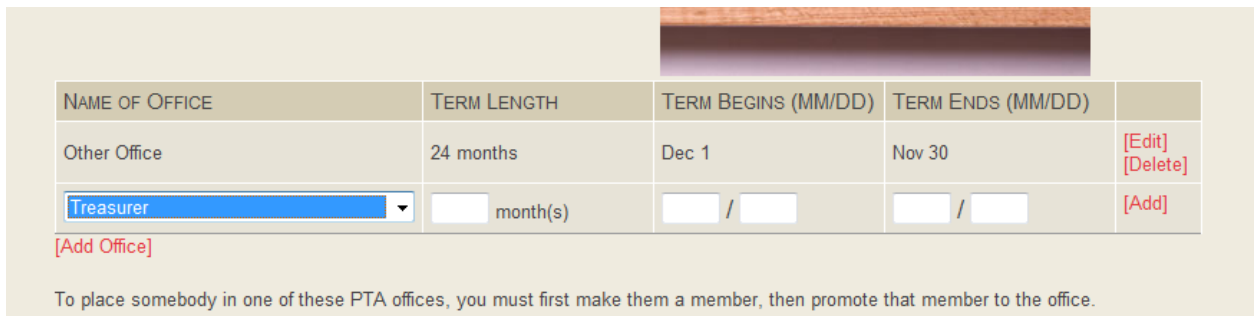
[Add Office]

- v) Now use the drop down arrow to the right of the input field under name of office to receive the list of current office selections and click on the office you wish to add. Note if your office is not in there select Other Office. We will add treasurer in this

example, so click on this office name:



b) You returned screen should appear to be something like the following snapshot:



- After confirmation of the existence of your office and term click on the tab <PTA Members>.
- Select the red words: **Master PTA Roster** and click on the round button (radio)button "Show All in Community". Notice below how it turns blue:



- 8) Find your member in the list presented and if they are not a member of PTA click on the box to the left of name (this puts in a checkmark):

<input type="checkbox"/>	TYPE	LAST NAME	FIRST NAME	PTA MEMBER ID	MEMBER 2007 - 2008
<input checked="" type="checkbox"/>	Adult	smith	julia		

- 9) Now you are ready to make the individual a member of PTA. Click on the

button.

- 10) You will get a dialog box which will ask some questions.

- a) First select the year for which you will be making them a member.
- b) Second, select whether or not they have paid. See the example below. We have used 2007-2008 as our year:

Year:

- 2007 - 2008
- 2008 - 2009
- 2009 - 2010

"Do you also want to mark these members as PAID ?"

- No
- Yes

OK Cancel

11) Below you see what the screen looks like in our case. Note you have selected the button **Snapshot 2007-2008**. This gives you a look at the status of our members for the selected year:

Join/Renew Member Mark Paid Page Size 100

Member Status **Pmt Status** Card Status **Snapshot 2007-2008** Snapsho

1 - 1 of 1 Results

<input type="checkbox"/>	TYPE	LAST NAME	FIRST NAME	PTA MEMBER ID	MEMBER 2007 - 2008
<input checked="" type="checkbox"/>	Adult	smith	julia		

12) Once you have made our “officer-to-be” a member, you will actually make them an officer. Click on the <PTA Officers> tab.

13) Then the red words: **Manage PTA Officers**. You will get a screen similar to the following:

View 20 officers at a time. View officers by first letter of last name.

<< First < Previous Page 1 of 1 Next > Last >>

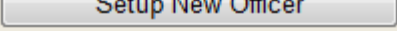
Select	Unit ID	Last	First	Office	Start	Term	End	Active	
<input type="checkbox"/>	00050001	smith	julia	Treasurer	Jul 01, 2009		Jun 30, 2010	Future	[Edit]

<< First < Previous Page 1 of 1 Next > Last >>

Setup New Officer

Expire Selected Officer(s)

Print Officer Roster

14) To add a new officer click on the button: . You will get a screen asking you to supply a members name for officer. We input smith in the name field:

View 20 officers at a time.
 View officers by first letter of last name.

Page 1 of 1

Select	Unit ID	Last	First	Office	Start	Term
<input type="checkbox"/>	00050001	smith	julia	Treasurer	Jul 01, 2009	

Page 1 of 1

SEARCH FOR PTA MEMBER

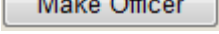
Search by Last Name: (Leave blank for all possible results)

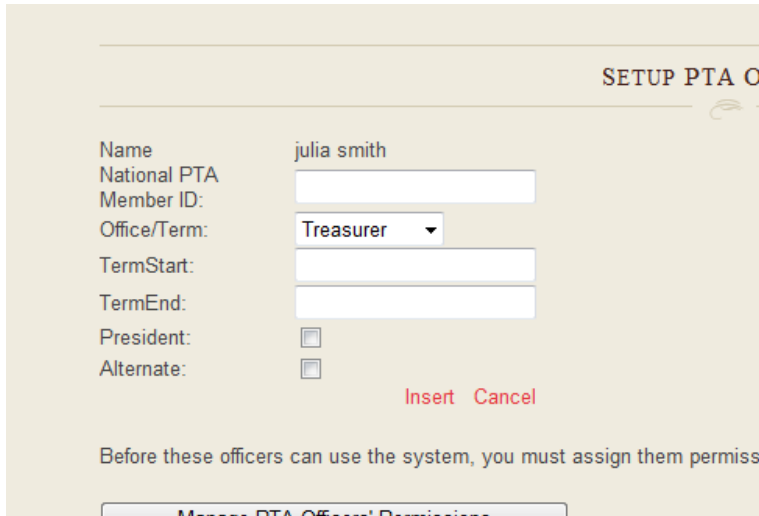
15) Click on search and you will get back all members with that name from which to choose:

Search by Last Name: (Leave blank for all possible results)

HOUSEHOLD	ADDRESS				
The smith Household	No Address Found				
	<table border="1"> <thead> <tr> <th>HOUSEHOLD MEMBER NAME</th> <th>ADDRESS</th> </tr> </thead> <tbody> <tr> <td> <input type="button" value=" Make Officer"/> julia smith </td> <td>No Address Found</td> </tr> </tbody> </table>	HOUSEHOLD MEMBER NAME	ADDRESS	<input type="button" value=" Make Officer"/> julia smith	No Address Found
HOUSEHOLD MEMBER NAME	ADDRESS				
<input type="button" value=" Make Officer"/> julia smith	No Address Found				

Before these officers can use the system, you must assign them permission.

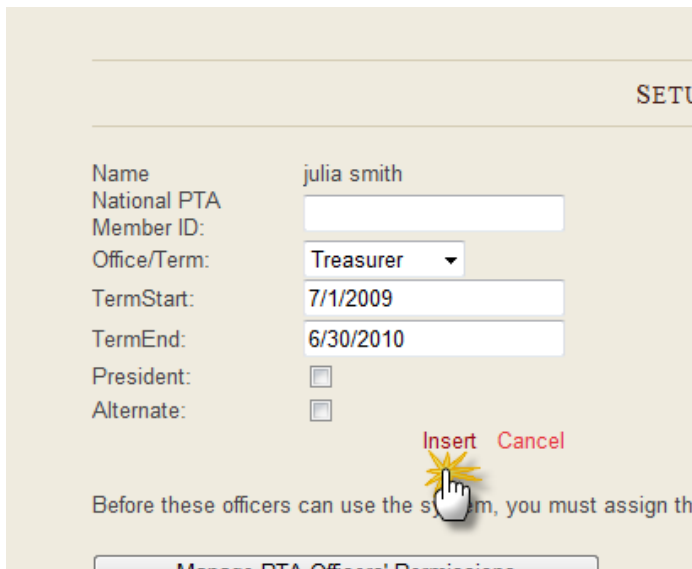
16) Select your member to promote to officer by clicking on the button:  and getting the following screen back:



17) Fill in the following information: Select Office/Term by click on the dropdown arrow; Term Start; Term End.

- a) **Important:** if this person is to be your alternate in OMDRplus admin or your president – checkmark the appropriate boxes under field: TermEnd
- b) Note that the term start and end may be different from the office term. These dates are associated with the person not the office.

18) After entering the information click on the red word **Insert**.



19) Your information should look something like the following:

View 20 officers at a time. View officers by first letter of last name.

<< First < Previous Page 1 of 1 Next > Last >>

Select	Unit ID	Last	First	Office	Start	Term	End	Active	
<input type="checkbox"/>	00050001	smith	julia	Treasurer	Jul 01, 2009		Jun 30, 2010	Future	[Edit]
<input type="checkbox"/>	00050001	smith	julia	Treasurer	Jul 01, 2009		Jun 30, 2010	Future	[Edit]

<< First < Previous Page 1 of 1 Next > Last >>

Setup New Officer

20) Once you have added an officer you **must** give them permissions if you wish for them to do work within the system. Remember not every officer or chair requires permissions.

21) To add permissions Click on the Tab <PTA Officers> → then select red words **Manage PTA Officers' Permissions** → Locate your officer by first letter of last name → click on change to the right of the name and then select permissions as needed.

22) Remember: If you wish to give them working rights within the system they must also be set up as an admin on the administrative side.