Core Information System

UNION INFORMATION SYSTEM

USER GUIDE

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Introduction

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Objectives

This guide covers the basic setup routines for enabling users to enter membership data.

After reading Chapter 1, you will have a better understanding about:

- The objectives of the other chapters.
- What you should know about the text.
- The document terms used throughout the guide.

What You Should Know About the Text

Text Formatting | To make the text easier to read, several formatting conventions have been used throughout the step-by-step instructions:

Bold | Aside from the headings, and the text highlighted in the displays, bold text is used to describe the use of keyboard keys. Example: Press Enter.

Italics	Italics are used in the "Display Pointers" which can be seen on the left side of each display figure in Chapter 3. Italics are also used in references. Example: See Table 3-7...
Bold Italics	Bold Italics are used for anytime the user is meant to key in a stream of text. Whenever bold italics are used, the characters are meant to be keyed as shown, using the same capitals or lower case letters as written in the instruction. Example: Type ABC...
Courier Font	Courier New Font is used to describe text found in the displays. This font is used as a substitute for quotation marks because sometimes there can be some confusion as to whether the quotation marks are included as part of the example or not. Example: Processing Print List....

Document Terms

Display	When used as a noun, it refers to the full screen image. When used as a verb, it means to show.
Functions	The function keys listed at the bottom of the displays and windows. The functions are explained in Using the Function Keys.
Notes	Shared, brief comments, attached to data records, used to enhance workplace communications.
Options	The horizontal menu options, these usually range from 1 to 9, and may include letters such as P for Posting.
Panel	A bordered image that partially covers the full screen image.

Union System Overview

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Objectives

After reading Chapter 2, you will have a better understanding about:

- The basic concepts and principles of the Union Information System.
- Searching the Union Module databases for records.
- Using the function keys.
- Using some of the other keys.

The Union Module

Membership Management

The CIS Union Module is a membership management system that covers Accounts Receivable functions, agreements, benefits and other related topics. While this is not a complete accounting system, KDI's Core Information System offers Accounts Payable, and General Ledger modules that can be integrated with the Union module, to provide you with a complete system.

Members, Employers and Agreements

The basis for a union member's relationship with his or her employer is the collective bargaining agreement. Each agreement may cover several employers. Employers may not be covered by more than one agreement, but different employers may have their own unique agreements with the same union. The Union Module helps you keep track of employers and agreements.

When members are entered into the system, they are normally assigned an Employer (Source) Code. Employer Codes determine Agreement Codes, which in turn determine the dues owed by the members.

Unemployed members are governed by the union's business rules.

Collecting and Entering Dues Payments

There are two basic methods for collecting dues. Some employers submit dues on behalf of the members who are working for them. Other members submit their dues independently.

When dues payments are received and entered into the system, the programs query the source of the dues, the employer, and then query the agreement that the employer has signed with the union. The Agreement Code determines the exact amount owed by the member based on the dues type, arrears and any adjustments built into the contract.

There are usually several different Dues categories including Initiation, Retired and others. Each dues category is governed by the agreement or rule that pertains to the member.

Setting up the Parameters

Before dues can be entered, all of the parameters discussed in this guide must be entered. These parameters must be setup in the order of their appearance in the Table of Contents.

Dues types can be linked to the CIS General Ledger through the use of account numbers.

Searching

Number Searches

When searching from a Number search field, such as Address Number, press Field Exit, then Enter to activate the search. Most of the Number search fields do not allow an Enter keystroke from within the field.

If the Enter key is pressed while the cursor is inside a Number search field, the message, Enter key not allowed in field appears. Press Reset to remove the message, then press Field Exit, and then Enter, to submit the search.

Scan Limit Reached

In searches made through large files, the search range is restricted to avoid system congestion. If the Scan Limit Reached message appears in the bottom left, it means that the search target was not found within the immediate search range, and, the search range did not cover the entire file. Press the Page Down key to search the next file portion.

If the search target does not exist in the file, the message, No data to display appears.

Using the Function Keys

Function Keys

This is a discussion of some of the function keys and their uses. If the users have older terminal, the function keys may be labeled as Cmd such as Cmd1 or Cmd3. In most cases they are labeled as **F1** and **F3.**

Table 1-1: Common Function Keys

Key	Function	Description
F1	Help	**F1** always bringd up the on-line help displays.
F3	Exit	**F3** always lets the user exit out the current display. **F3** is used at the User Application Menu, to sign off.
F5	Refresh	**F5** updates the display if the user has made a change to the data.
F7	Scroll Up	**F7** lets the users scroll upwards through lists.
F8	Scroll Down	**F8** lets the users scroll down through lists.

Other F Keys

There are other F keys used for different purposes and their uses are shown at the bottom of the displays where they are active.

F13 Through **F24**

On a PC keyboard, hold down the Shift key and press **F1** to activate **F13**. The table below shows how to activate the higher numbered F keys:

Table 1-2: Accessing High-Numbered Function Keys on a PC

Function Key	PC Key Strokes	Function Key	PC Key Strokes
F13	Shift + F1	**F19**	Shift + F7
F14	Shift + F2	**F20**	Shift + F8
F15	Shift + F3	**F21**	Shift + F9
F16	Shift + F4	**F22**	Shift + **F10**
F17	Shift + F5	**F23**	Shift + **F11**
F18	Shift + F6	**F24**	Shift + **F12**

Using Some of the Other Keys

Field Exit	This key appears as the right-hand Ctrl key on the PC keyboard. The Field Exit key is familiar to AS/400 users as a means of clearing a field to the right of the cursor location.
Reset	This key appears as the left-hand Ctrl key on the PC keyboard. Reset is the normal response to many system error messages. Consult with the installing programmer for clarification.
Escape	The Esc key brings down the Attention Key Menu, which offers short cut access to commonly used functions such as Work With Members, and Send Message. The Attention Key Menu is maintained with the Run Time Application.
	The Attention Key Menu also has a Display Message option that lets the users work with any system messages that be holding up their printing or processing jobs.
Print Screen	The Print Screen key is useful for making hard copies of static displays. After each screen print, the message Print operation complete to the default printer device file appears, notifying the user that the screen print was successful. Press the Reset key to remove this message.

1 Membership Information

Working With Members

User Application Menu	Start from User Application Menu .
For More Information	For complete step-by-step instructions, see Section 3.1.

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Membership Information	Tab Down to Membership Information , type a 1, and press Enter.	Run Application SubMenu
3. Members	Key in a 1 beside Work With Members.	Work With Members

Done

Adding New Members

Work With Members	Start from Work With Members .
For More Information	For complete step-by-step instructions, see Section 3.1.1, Adding New Members.

Steps	Do This	You Will See
1. Add	Press **F6.**	Add Member Page 1
2. Your Choices	There are several data entry fields to be filled in. **F4** lets you prompt for any codes.	
3. Status Code	Fill in the name, then tab down to the Membership Status Code field.	
4. Prompt For Status Codes	Press **F4.**	Select Membership Status
5. Your Choices	Option 1 lets you select one of the codes. Page Down or **F8** lets you go to the next page, if desired.	
6. Select	Tab down to the desired code, type a 1, and press Enter.	Add Member Page 1 with the Membership Status Code field filled
7. Your Choices	The Employer Code, Posting Code, and the other code fields, except for Postal Code, can be prompted and filled the same way. The Pension Plan fields are optional.	
8. Complete	Complete the data entry, prompting where necessary. When you have filled out all of the fields on this page, press Page Down.	Add Member Page 2

Continued…

Steps	Do This	You Will See
9. Filling	Fill in the Date Application field, then tab down to the Board Code field and prompt it with **F4.**	Select Board
10. Selecting	Type a 1 beside the desired board and press Enter.	Add Member Page 2 with the Board Code filled.
11. Processing	Press Enter, then press Enter again to confirm.	Work With Members with the new Member added.

Done

Changing Member Data

Work With Members	Start from Work With Members .
For More Information	For complete step-by-step instructions, see Section 3.1.2.

Steps	Do This	You Will See
1. Searching	Type either the Name or S.I.N., into the proper search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the Member and type a 2 beside them. Press Enter.	MODIFY MEMBER PAGE 1.
3. Edit	Type in your changes, or use **F4** to prompt the code fields for a different code. Press Enter.	The Confirm prompt
4. Continuing	Press Enter.	Work With Members.

Done

Displaying Member Details

Work With Members	Start from Work With Members .
For More Information	For complete step-by-step instructions, see Section 3.1.3.

Steps	Do This	You Will See
1. Searching	Type either the Name or S.I.N., into the proper search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the Member, key in a 5, and press Enter.	DISPLAY MEMBER PAGE 1.
3. Your Choices	You can use the Screen Print key to create a print-out. **F3** lets you exit this display.	
4. Exit	Press **F3.**	Work With Members.

Done

Printing Member Details

Work With Members	Start from Work With Members .
For More Information	For complete step-by-step instructions, see Section 3.1.4.

Steps	Do This	You Will See
1. Searching	Type either the Name or S.I.N., into the proper search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the Member, type a 6, and press Enter.	There will be no noticeable change to your display
3. Gather Your Print-out	Go to the printer and gather your print-out.	

Done

Displaying Member History

Work With
Members

Start from Work With Members .

For More
Information

For complete step-by-step instructions, see Section 3.1.5.

Steps	Do This	You Will See
1. Searching	Type either the Name or S.I.N., into the proper search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the Journal Entry, key in a 7, and press Enter.	Display Member History
3. Your Choices	You can use the Screen Print key to create a print-out. **F3** lets you exit this display.	
4. Exiting	Press **F3** to exit.	Work With Members

Done

Processing Dues Payments

Work With Members	Start from Work With Members .
For More Information	For complete step-by-step instructions, see Section 3.1.6.

Steps	Do This	You Will See
1. Searching	Type either the Name or S.I.N., into the proper search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down and type an 8, beside the Member, and press Enter.	Display Member Dues Transactions.
3. Your Choices	**F6** lets you enter Member dues.	
4. Entering	Press **F6.**	Enter Member Dues.
5. Your Choices	Your cursor is in the Dues Category field. **F4** lets you prompt this field. You may only prompt for one Dues Category at a time.	
6. Prompting	Press **F4.**	Select Dues.
7. Selecting	Tab down to the desired Dues Category and type a 1 beside it. Press Enter.	Enter Member Dues with the Dues Category, Description and Default Rate filled in.
8. Completing	Fill in the remaining fields and either: Tab down to the next Dues Category field, press **F4,** and repeat step 7; or Press Enter, then press Enter again to confirm your entry.	Once you have confirmed your entry, the entry fields will be emptied. This allows you to fill in another Dues entry for the same Member for a different time period, if desired.
9. Your Choices	Repeat steps 5, 6, 7, and 8 for a different time period. Press **F3** to exit.	

Continued…

Steps	Do This	You Will See
10. Receipts	Press **F3.**	Print Dues Receipt Prompt.
11. Your Choices	Enter lets you exit without printing a receipt. Changing the N to a Y and pressing Enter lets you produce a receipt.	
12. Requesting	Change the N to a Y, and press Enter.	Display Member Dues Transactions.
13. Your Choices	Your data now appears on this display. A Dues Receipt has been sent to your print queue. **F6** lets you enter more dues for this Member. **F3** lets you exit.	
14. Exiting	Press **F3.**	Work With Members.

Done

Working With Notes

Work With
Members

Start from Work With Members .

For More
Information

For complete step-by-step instructions, see Section 3.1.7.

Steps	Do This	You Will See
1. Searching	Type either the Name or S.I.N., into the proper search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the Member and type a 9 beside them. Press Enter.	Work With Member Notes
3. Your Choices	Notes are thoroughly explained in the Users' Guide to the Contact Management Module. **F6** lets you add Notes. Option 4 lets you delete Notes lines. **F3** lets you exit.	
4. Exiting	Press **F3.**	Work With Members

Done

Displaying Dispatch History

Work With Members	Start from Work With Members .
For More Information	For complete step-by-step instructions, see Section 3.1.8.

Steps	Do This	You Will See
1. Searching	Type either the Name or S.I.N., into the proper search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the Member and type an H. Press Enter.	Display Member Dispatch History
3. Your Choices	This display shows a list of recorded contact between the union and the Member with respect to dispatch requests. This list is updated through Work with Dispatch Request, see Chapter 5. **F3** lets you exit.	
4. Exiting	Press **F3.**	Work With Members.

Done

Working With Qualifications

Work With
Members

Start from Work With Members .

For More
Information

For complete step-by-step instructions, see Section 3.1.9.

Steps	Do This	You Will See
1. Searching	Type either the Name or S.I.N., into the proper search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the Member and type a Q. Press Enter.	Work With Member Qualifications
3. Your Choices	**F6** lets you add new Qualifications. Option 2 lets you edit the References, Certificate Numbers and System Dates for each Qualification. Option 4 lets you remove Qualifications from the Member's list. These functions and options are discussed in the next three sections.	

Done

Adding New Qualifications

Work With Member Qualifications	Start from Work With Member Qualifications .
For More Information	For complete step-by-step instructions, see Section 3.1.9.1.

Steps	Do This	You Will See
1. Adding	Press **F6.**	Add Member Qualifications
2. Your Choices	**F4** lets you prompt the Qualification Code.	
3. Prompting	Press **F4.**	Select Qualifications
4. Your Choices	Page Down and **F8** let you see the next page. Option 1 lets you select a Qualification.	
5. Selecting	Tab down to one of the Qualifications and type a 1. Press Enter.	Add Member Qualifications
6. Completing	Fill in the remaining fields, if desired. Press Enter, then Enter again to process and confirm your request.	Work With Member Qualifications

Done

Editing Qualifications

| Work With Member Qualifications | Start from Work With Member Qualifications . |
| For More Information | For complete step-by-step instructions, see Section 3.1.9.2. |

Steps	Do This	You Will See
1. Searching	Type a Qualification Code into the search field, and press Field Exit then Enter.	The Qualification
2. Selecting	Tab down to the Qualification and type a 2. Press Enter.	Edit Member Qualification
3. Your Choices	Only the Reference, Certification Number and System Date can be changed.	
4. Editing	Change the desired field and press Enter to process. Press Enter again to confirm.	Work With Member Qualifications

Done

Removing Qualifications

| Work With Member Qualifications | Start from Work With Member Qualifications . |
| For More Information | For complete step-by-step instructions, see Section 3.1.9.3. |

Steps	Do This	You Will See
1. Searching	Type a Qualification Code into the search field, and press Field Exit then Enter.	The Qualification
2. Selecting	Tab down to the Qualification and type a 4. Press Enter.	Delete Qualification
3. Deleting	Press Enter to process, then press Enter again to confirm.	Work With Member Qualifications

Done

Working With Deposits

| User Application Menu | Start from User Application Menu . |
| For More Information | For complete step-by-step instructions, see Section 3.2. |

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Membership Information	Tab Down to Membership Information , type a 1, and press Enter.	Run Application SubMenu
3. Deposits	Type in a 1 beside Work With Deposits.	Work With Deposits

Done

Adding Deposits

Work With Deposits	Start from Work With Deposits.
For More Information	For complete step-by-step instructions, see Section 3.2.1.

Steps	Do This	You Will See
1. Adding	Press **F6.**	Add Deposit
2. Your Choices	**F4** lets you prompt the Employer Code field.	
3. Prompting	Press **F4.**	Select Employer
4. Your Choices	Option 1 lets you select one of the listed Employers. **F6** lets you add a new Employer to the list. **F8** lets you see the next page in the list.	
5. Selecting	Tab down to one of the Employers and type a 1. Press Enter.	Add Deposit with the Employer Code field filled
6. Total	Fill the Total Deposit, then tab down to Sort Members by, and press **F4.**	A drop box
7. Your Choices	Option 1 lets you sort by last name. Option 2 lets you sort by employee number Your selection will determine how the employees are sorted on the Work With Member Dues Transaction display.	
8. Selecting	Type either 1 or 2.	Add Deposit with the Sort Members by field filled.
9. Completing	Fill in the remaining fields and press Enter to process. Press Enter again to confirm.	Work With Deposit Details
10. Your Choices	Having entered a deposit, you must now add the details.	

	F6 lets you add details.	

Continued...

Steps	Do This	You Will See
11. Adding Details	Press **F6.**	Add Deposit Details
12. Your Choices	**F4** lets you prompt the Dues Category field.	
13. Prompting	Press **F4.**	Select Dues
14. Your Choices	Option 1 lets you select one of the Dues Categories.	
15. Selecting	Tab down to the desired Dues Category and type a 1. Press Enter.	Add Deposit Details with the Dues Category field filled.
16. Your Choices	Next the remitted amounts must be filled in. The amounts must be right-justified, or else they won't be accepted by the system. Field Exit lets you right-justify the amounts.	
17. Filling Amounts	Tab down to the Amount Remitted field, type an amount, and press Field Exit. Repeat with the Amount Calculated field.	
18. Processing	Press Enter to process, then press Enter again to confirm.	Work With Member Dues Transaction
19. Your Choices	If the dues remittance needs to be applied to more than one Member, press **F6.** If not, press **F3** and skip ahead to Step 25.	
20. Adding	Press **F6.**	Add Member Transaction
21. Your Choices	You only need to fill in the Member Reference field.	
22. Reference	Type in a Member reference number and press Enter.	The Member's name appears along with a Confirm prompt.
23. Continuing	Press Enter to continue.	Work With Member Dues Transaction

Continued...

Steps	Do This	You Will See
24. Your Choices	Your transaction appears on the screen. Option 2 lets you change the Dues Remitted and the Transaction Reference Number. Option 4 lets you delete transactions. **F3** lets you exit.	
25. Exiting	Press F3	Work with Deposit Details
26. Your Choices	Your transaction appears. If your transaction is not balanced, you will either need to add one or more transaction details, or change the remittance value. Option 8 takes you back to the Work With Member Dues Transaction. **F3** lets you exit.	
27. Exiting	Press F3	Work With Deposits

Done

Changing Deposit Summaries

Work With Deposits	Start from Work With Deposits.
For More Information	For complete step-by-step instructions, see Section 3.2.2.

Steps	Do This	You Will See
1. Searching	Type a Batch Number into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Deposit
2. Selecting	Tab down to the Deposit and type a 2. Press Enter.	Edit Deposit Summary
3. Your Choices	Only the Deposit Date, Total Deposit, and Transaction Reference can be changed. If you want to edit the deposit details, choose option 8 from the Work With Deposits display, as discussed in Section 10.1.2.4.	
4. Changing The Date	Type in a new date, if desired: mmddyy. Press Field Exit.	
5. Completing The Changes	Type in a new Total Deposit and Transaction Reference, if desired. Press Field Exit after each change.	
6. Processing	Press Enter to process, then press Enter again to confirm.	Work With Deposits

Done

Printing Deposit Details

Work With Deposits	Start from Work With Deposits.
For More Information	For complete step-by-step instructions, see Section 3.2.3.

Steps	Do This	You Will See
1. Searching	Type a Batch Number into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Deposit
2. Selecting	Tab down to the Deposit and type a 6. Press Enter.	The message: Processing print request... A print-out will be sent to your print queue.

Done

Working With Deposit Details

Work With Deposits	Start from Work With Deposits.	
For More Information	For complete step-by-step instructions, see Section 3.2.4.	

Steps	Do This	You Will See
1. Searching	Type a Batch Number into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Deposit
2. Selecting	Tab down to the Deposit and type an 8. Press Enter.	Work With Deposit Details
3. Your Choices	**F6** lets you add new details.	
4. New Details	Press F6	Add Deposit Details
5. Your Choices	Three fields must be filled: Dues Category, Amount remitted, and Amount Calculated **F4** let you prompt for Dues Categories	
6. Prompting	Press F4	Select Dues
7. Your Choices	**F8** lets you scroll to the next page. There are search fields at the top to help you find any categories that are not displayed. Option 1 lets you select a Dues Category	
8. Selecting	Tab down to one of the categories and type a 1. Press Enter.	Add Deposit Details
9. Your Choices	The selected dues category now fills the Dues Category field. The Amount Remitted is next. This is the amount actually paid.	
10. Filling	Fill in the amount and press Field Exit.	The entered numbers shift to the right.

Continued...

Steps	Do This	You Will See
11. Filling	Fill in the Amount Calculated: This is the amount that the Member owes. Press Field Exit.	The entered numbers shift to the right.
12. Other Fields	The Difference field shows the difference between how much is owed and how much is being paid. The Sort Details By field lets you sort this record by either employee name or employee number. The sort criteria can be changed by prompting it with **F4.**	
13. Processing	Press Enter, then press Enter again to confirm.	Work With MBR Dues Transactions
14. Your Choices	If the Amount Remitted includes dues for individual Members, this display is used to allocate the remittance into separate Member transactions. If there are no separate Member transactions to record, press **F3** to exit. If separate Member transactions are required, press **F6.**	
15. Adding	Press F6	Add Member Transaction
16. Your Choices	A Member Reference number must be entered. Press **F4** to prompt.	
17. Prompting	Press F4	Select Member
18. Your Choices	There is a list of Members to choose from. Press **F6** to add new Members. Select Members with option 1.	
19. Selecting	Tab down to a Member and type a 1. Press Enter.	Add Member Transaction

Continued...

Steps	Do This	You Will See
20. Your Choices	The Member Reference has been selected and the Names now appear. Next fill the Dues Remitted.	
21. Filling	Fill in a Dues Remitted amount, and press Field Exit.	The entered numbers shift to the right.
22. Your Choices	The following fields can also be changed: Transaction Reference Number, Sort Details By, and Effective Period.	
23. Processing	Press Enter then press Enter again to confirm.	Work With Mbr Dues Transactions
24. Your Choices	Your new Member transaction now appears on this display. Option 2 lets you edit the Amount Remitted and the Transaction Reference number. Option 4 lets you delete Member transactions. **F21** lets you print a listing of all Member transactions listed against this deposit detail. **F6** lets you add another Member transaction, if desired. **F3** lets you exit.	
25. Exiting	Press **F3.**	Work With Deposit Details

Continued...

Steps	Do This	You Will See
26. Your Choices	Your new deposit detail now appears on this display. Option 2 lets you edit the Amount Remitted and the Transaction Reference number. Option 4 lets you delete Deposit Details. Option 8 lets you return to Work With Member Transaction Details for the selected Deposit Detail. **F21** lets you print a lising of the Deposit Details for this Deposit. **F6** lets you add another Deposit Detail, if desired. **F3** let you exit.	
27. Exiting	Press **F3** to exit.	Work With Deposits

Done

Posting Deposits

Work With
Deposits

Start from Work With Deposits.

For More
Information

For complete step-by-step instructions, see Section 3.2.5.

Steps	Do This	You Will See
1. Searching	Type a Batch Number into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Deposit
2. Selecting	Tab down to the Deposit and type a P. Press Enter.	Post Deposit
3. Your Choices	**F3** lets you exit without posting. Enter lets you post.	
4. Posting	Press Enter to post, then press Enter again to confirm.	Work With Deposits, the Deposit Status will now read 1. This means that the deposit batch has been posted.

Done

Unposting Deposits

Work With Deposits	Start from Work With Deposits.
For More Information	For complete step-by-step instructions, see Section 3.2.6.

Steps	Do This	You Will See
1. Searching	Type a Batch Number into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Deposit
2. Selecting	Tab down to the Deposit and type a U. Press Enter.	UnPost Deposit
3. Your Choices	**F3** lets you exit without unposting. Enter lets you unpost.	
4. Unposting	Press Enter to unpost, then press Enter again to confirm.	Work With Deposits, the Deposit Status will now read 0. This means that the deposit batch has been reopened.

Done

Deleting Deposits

Work With Deposits	Start from Work With Deposits.
For More Information	For complete step-by-step instructions, see Section 3.2.7.

Steps	Do This	You Will See
1. Searching	Type a Batch Number into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Deposit
2. Selecting	Tab down to the Deposit and type a 4. Press Enter.	Delete Deposit & Details
3. Your Choices	**F3** lets you exit without deleting. Enter lets you delete.	
4. Deleting	Press Enter to delete, then press Enter again to confirm.	Work With Deposits: the deleted Deposit no longer appears.

Done

Importing Journal Entries

User Application Menu	Start from User Application Menu .
For More Information	For complete step-by-step instructions, see Section 3.3.

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Membership Information	Tab Down to Membership Information , type a 1, and press Enter.	Run Application SubMenu
3. Deposits	Type in a 1 beside Import Journal Entries, and press Enter.	Import Journal Entries
4. Your Choices	The GL Source Code field lets you select which GL to import. Enter lets you import. **F3** lets you exit without importing.	

Done

Printing Member Labels

User Application Menu	Start from User Application Menu .
For More Information	For complete step-by-step instructions, see Section 3.3.

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Membership Information	Tab Down to Membership Information , type a 1, and press Enter.	Run Application SubMenu
3. Deposits	Type in a 1 beside Print Member Labels, and press Enter.	Select & Print Labels
4. Your Choices	If you make no selections, you will be printing a label for every Member You can fill in as few or as many fields as desired. As you fill in more fields, you reduce the number of labels printed. **F4** lets you prompt for the codes. See Section 3.4.1 for an example of printing labels.	

Done

2 Employers & Agreements

Working With Employers

User Application Menu	Start from User Application Menu .
For More Information	For complete step-by-step instructions, see Section 4.1.

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Employer & Agreements	Tab Down to Employer & Agreements, type a 1, and press Enter.	Run Application SubMenu
3. Employer	Key in a 1 beside Work With Employer (Source).	Work With Employer (Source)

Done

Adding New Employers

| Work with Employer (Source) | Start from Work with Employer (Source). |
| For More Information | For complete step-by-step instructions, see Section 4.1.1. |

Steps	Do This	You Will See
1. Adding	Press F6	Add Employer - Source KEY SCREEN
2. A New Code	Type in a new Source Code, and press Enter.	Add Employer - Source Details
3. Your Choices	**F4** lets you prompt the Employer Type Code, Source Status and Agreement Code fields. **F21** lets you change the Source Code.	
4. Filling	Fill in the data, prompting where necessary, and press Enter. Press Enter again to confirm.	Work With Employer (Source)
5. Searching	Your new Employer may not appear on the display. Use the search fields to find it, if necessary.	

Done

Editing Employers

Work with Employer (Source)	Start from Work with Employer (Source).
For More Information	For complete step-by-step instructions, see Section 4.1.2.

Steps	Do This	You Will See
1. Searching	Type a Source Code into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Employer
2. Selecting	Tab down to the desired Employer and type a 2, then press Enter.	Edit Employer - Source Details
3. Your Choices	All fields can be changed except for the Source Code. A question mark lets you prompt the Province Code. **F4** lets you prompt the Employer Code, Source Status and Agreement Code.	
4. Editing	Make all desired changes, press Enter, then press Enter again to confirm.	Work With Employer (Source)

Done

Copying Employers

Work with Employer (Source)	Start from Work with Employer (Source).
For More Information	For complete step-by-step instructions, see Section 4.1.3.

Steps	Do This	You Will See
1. Searching	Type a Source Code into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Employer
2. Selecting	Tab down to the desired Employer and type a 3, then press Enter.	Copy Employer - Source
3. Your Choices	All fields can be changed. **F4** lets you prompt the Code fields.	
4. Copying	Change the Source Code as well as any other desired fields, and press Enter. Press Enter again to confirm.	Work With Employer (Source)

Done

Displaying Employers

Work with Employer (Source)	Start from Work with Employer (Source).
For More Information	For complete step-by-step instructions, see Section 4.1.4.

Steps	Do This	You Will See
1. Searching	Type a Source Code into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Employer
2. Selecting	Tab down to the desired Employer and type a 5, then press Enter.	Display Employer (Source)
3. Your Choices	This is a static display: no changes can be made. Screen Print lets you print a copy of this display. **F3** lets you exit.	
4. Returning	Press F3	Work With Employer (Source)

Done

Deleting Employers

Work with Employer (Source)	Start from Work with Employer (Source).
For More Information	For complete step-by-step instructions, see Section 4.1.5.

Steps	Do This	You Will See
1. Searching	Type a Source Code into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Employer
2. Selecting	Tab down to the desired Employer and type a 4, then press Enter.	Confirm Delete Employer
3. Your Choices	This display lets you make sure that you have selected the correct Employer to delete. **F3** lets you cancel your request. Enter lets you continue.	
4. Deleting	Press Enter, then press Enter to confirm.	Work With Employer (Source)

Done

Printing Employer Labels

User Application Menu	Start from User Application Menu .
For More Information	For complete step-by-step instructions, see Section 4.1.

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Employer & Agreements	Tab Down to Employer & Agreements, type a 1, and press Enter.	Run Application SubMenu
3. Employer	Key in a 1 beside Select & Print Employer Labels	Select & Print Labels
4. Your Choices	You must select an Employer Type Code Changing the Mailing List Format is optional. **F4** lets you prompt these fields.	
5. Prompting	Tab down to the Mailing List Format field and press **F4.**	A drop box
6. Your Choices	There are 3 types to choose from. Select one of the types by typing its corresponding number. Your choice will appear as either L for Standard Label, E for Envelopes, or 2 for 2 UP.	
7. Printing	Select a Label Type, the press Enter. Press Enter again to confirm.	Run Application SubMenu

Done

Working With Agreements

User Application
Menu

Start from User Application Menu .

For More
Information

For complete step-by-step instructions, see Section 4.3.

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Employer & Agreements	Tab Down to Employer & Agreements, type a 1, and press Enter.	Run Application SubMenu
3. Agreements	Key in a 1 beside Work With Agreements	Work With Agreements

Done

Adding New Agreements

Work With Agreements	Start from Work With Agreements.
For More Information	For complete step-by-step instructions, see Section 4.3.1.

Steps	Do This	You Will See
1. Adding	Press F6	Add Agreement KEY SCREEN
2. Your Choices	Your cursor is in the Agreement Code field. This is a new Agreement, therefore you must create a new Agreement Code.	
3. A New Code	Type a new Agreement Code and press Enter.	Add Agreement Details
4. Your Choices	These fields are to be filled without prompting. The date format is mmddyy. **F12** lets you change the Agreement Code.	
5. Filling	Fill in the data fields, press Enter and press Enter again to confirm.	Work With Agreements
6. Your Choices	If the new Agreement does not appear, use the search fields to find it.	

Done

Changing Agreements

Work With
Agreements

Start from Work With Agreements.

For More
Information

For complete step-by-step instructions, see Section 4.3.2.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Agreement
2. Selecting	Tab down to the desired Agreement and type a 2, then press Enter.	Edit Agreement Details
3. Your Choices	All of the fields except for Agreement Code can be changed.	
4. Changing	Change the desired field(s), press Enter, then press Enter again to confirm.	Work With Agreements

Done

Copying Agreements

Work With
Agreements

Start from Work With Agreements.

For More
Information

For complete step-by-step instructions, see Section 4.3.3.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Agreement
2. Selecting	Tab down to the desired Agreement and type a 3, then press Enter.	Copy Agreement Details
3. Your Choices	All of the fields including the Agreement Code can be changed.	
4. Copying	Change the Agreement Code, and any other desired field(s), press Enter, then press Enter again to confirm.	Work With Agreements

Done

Deleting Agreements

Work With
Agreements

Start from Work With Agreements.

For More
Information

For complete step-by-step instructions, see Section 4.3.4.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Agreement
2. Selecting	Tab down to the desired Agreement and type a 4, then press Enter.	Delete Agreement
3. Your Choices	This window lets you see if you have chosen the Agreement that you want deleted. Enter lets you continue. **F3** lets you exit without deleting.	
4. Deleting	Press Enter, then press Enter again to confirm.	Work With Agreements

Done

Working With Agreement Terms

Work With Agreements	Start from Work With Agreements.
For More Information	For complete step-by-step instructions, see Section 4.3.5.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Agreement
2. Selecting	Tab down to the desired Agreement and type a 5, then press Enter.	Work With Agreement Terms
3. Your Choices	The options and functions available for the Work With Agreement Terms display are described in the next 5 sections.	

Done

Adding New Terms

Work With Agreement Terms	Start from Work With Agreement Terms.
For More Information	For complete step-by-step instructions, see Section 4.3.5.1.

Steps	Do This	You Will See
1. Adding	Press F6	Add Agreement Terms Details
2. Your Choices	The Job Rate is the basic wage according to the Agreement.	
3. Filling	Fill in a Job Rate, press Enter then press Enter again to confirm.	Work With Agreement Terms

Done

Changing Terms

Work With Agreement Terms	Start from Work With Agreement Terms.
For More Information	For complete step-by-step instructions, see Section 4.3.5.2.

Steps	Do This	You Will See
1. Searching	Type a Job Code or Job Rate into the appropriate search field, and press Field Exit then Enter.	The Agreement Term
2. Selecting	Tab down to the desired Agreement Term and type a 2, then press Enter.	Edit Agreement Term Details
3. Your Choices	All of the fields except for Agreement Code can be changed.	
4. Changing	Change the desired field(s), press Enter, then press Enter again to confirm.	Work With Agreement Terms

Done

Copying Terms

Work With
Agreement Terms

Start from Work With Agreement Terms.

For More
Information

For complete step-by-step instructions, see Section 4.3.5.3.

Steps	Do This	You Will See
1. Searching	Type a Job Code or Job Rate into the appropriate search field, and press Field Exit then Enter.	The Agreement Term
2. Selecting	Tab down to the desired Agreement Term and type a 3, then press Enter.	Copy Agreement Term Details
3. Your Choices	All of the fields except the Agreement Code can be changed.	
4. Copying	Change the desired field(s), press Enter, then press Enter again to confirm.	Work With Agreement Terms

Done

Deleting Terms

Work With Agreement Terms Start from Work With Agreement Terms.

For More Information For complete step-by-step instructions, see Section 4.3.5.4.

Steps	Do This	You Will See
1. Searching	Type a Job Code or Job Rate into the appropriate search field, and press Field Exit then Enter.	The Agreement Term
2. Selecting	Tab down to the desired Agreement Term and type a 4, then press Enter.	Work With Agreement Terms

Done

Displaying Terms

Work With Agreement Terms	Start from Work With Agreement Terms.
For More Information	For complete step-by-step instructions, see Section 4.3.5.5.

Steps	Do This	You Will See
1. Searching	Type a Job Code or Job Rate into the appropriate search field, and press Field Exit then Enter.	The Agreement Term
2. Selecting	Tab down to the desired Agreement Term and type a 5, then press Enter.	Display Agreement Terms Details
3. Your Choices	This is a static display: no changes can be made. Screen Print lets you print a hard copy. **F3** lets you exit.	
4. Returning	Press F3	Work With Agreement Terms

Done

Working With Rates

Work With
Agreements

Start from Work With Agreements.

For More
Information

For complete step-by-step instructions, see Section 4.3.6.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Agreement
2. Selecting	Tab down to the desired Agreement Term and type a 8, then press Enter.	Work With Agreement Rates

Done

Adding An Agreement Rate

Work with Agreement Rates	Start from Work With Agreement Rates
For More Information	For complete step-by-step instructions, see Section 4.3.6.1.

Steps	Do This	You Will See
1. Adding	Press F6	Add Agreement Rate KEY SCREEN
2. Your Choices	The Dues Category field must be filled. **F4** lets you prompt this field.	
3. Filling	Fill in the fields, as required and press Enter.	Add Agreement Rate
4. Your Choices	This display is static: the data cannot be changed. Enter lets you continue.	
5. Continuing	Press Enter then press Enter again to confirm.	Work With Agreement Rates

Done

Deleting An Agreement Rate

Work With Agreement Rates	Start from Work With Agreement Rates
For More Information	For complete step-by-step instructions, see Section 4.3.6.2.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Agreement Rate
2. Selecting	Tab down to the desired Agreement Rate and type a 4, then press Enter.	Delete Agreement Rates
3. Your Choices	This window lets you see if you have chosen the Agreement that you want deleted. Enter lets you continue. **F3** lets you exit without deleting.	
4. Deleting	Press Enter, then press Enter again to confirm.	Work With Agreement Rates

Done

Working With Notes

Work With Agreements	Start from Work With Agreements.
For More Information	For complete step-by-step instructions, see Section 4.3.7.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Agreement
2. Selecting	Tab down to the desired Agreement and type a 9, then press Enter.	Display Agreement Notes
3. Your Choices	**F6** lets you add a new Note.	
4. Adding	Press F6	Add Agreement Notes
5. Creating A Note	Type your Note, then press Enter and press Enter again to confirm.	Add Agreement Notes
6. Your Choices	Your Note will disappear, and the display will be ready for another Note. You can either type another Note, or press **F3** to exit.	
7. Exiting	Press F3	Display Agreement Notes
8. Your Choices	Your Note appears along with any other Notes attached to this Agreement. **F6** lets you add another Note. **F3** lets you exit.	
9. Returning	Press F3	Work With Agreements

Done

3 Member Dispatch

Working With Dispatch Boards

User Application
Menu   Start from User Application Menu .

For More   For complete step-by-step instructions, see Section 5.1.
Information

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Member Dispatch	Tab Down to Member Dispatch, type a 1, and press Enter.	Run Application SubMenu
3. Dispatch	Key in a 1 beside Work With Dispatch Board.	Work With Dispatch Board

Done

Adding New Boards

Work With
Dispatch Board

Start from Work With Dispatch Board.

For More
Information

For complete step-by-step instructions, see Section 5.1.1.

Steps	Do This	You Will See
1. Adding	Press F6	Add Board
2. Your Choices	Your cursor is in the Board Code field. The Board Code can either be numbers or letters. The Next Sequence Number and Increment can be any number up to 99999 and will usually be 1, 10 or 100.	
3. Filling	Fill the fields, as required, then press Enter and press Enter again to confirm.	Work With Dispatch Board

Done

Changing Board Details

Work With Dispatch Board	Start from Work With Dispatch Board.
For More Information	For complete step-by-step instructions, see Section 5.1.2.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Board
2. Selecting	Tab down to the desired Dispatch Board and type a 2, then press Enter.	Edit Board Details
3. Your Choices	The Board Code cannot be changed. The Description, Next Sequence Number, and Increment can be changed as desired.	
4. Changing	Change the desired field(s), press Enter, then press Enter again to confirm.	Work With Dispatch Board

Done

Copying Boards

Work With Dispatch Board	Start from Work With Dispatch Board.
For More Information	For complete step-by-step instructions, see Section 5.1.3.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Board
2. Selecting	Tab down to the desired Dispatch Board and type a 3, then press Enter.	Copy Board
3. Your Choices	All of the fields can be changed. This function can be used to create a new board with the same details, or to copy the details from this board to another. **F4** lets you prompt for other Board Codes.	
4. Copying	Change the Board Code, along with any other desired field(s), press Enter, then press Enter again to confirm.	Work With Dispatch Board

Done

Working With Board Details

Work With
Dispatch Board

Start from Work With Dispatch Board.

For More
Information

For complete step-by-step instructions, see Section 3.2.1.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Board
2. Selecting	Tab down to the desired Dispatch Board and type a 8, then press Enter.	Display Dispatch Board
3. Your Choices	This display will act as the starting point for the next 5 sections.	

Done

Displaying Member Qualifications

Display Dispatch Board	Start from Display Dispatch Board.
For More Information	For complete step-by-step instructions, see Section 5.1.4.1.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a Q, then press Enter.	Display Member Qualifications
3. Your Choices	Qualifications can be added or removed from the Work With Members display. See Section 10.1.1.9. **F3** lets you exit.	
4. Exiting	Press F3	Display Dispatch Board

Done

Displaying Member Details

Display Dispatch Board	Start from Display Dispatch Board.
For More Information	For complete step-by-step instructions, see Section 5.1.4.2.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 5, then press Enter.	DISPLAY MEMBER PAGE 1
3. Your Choices	Qualifications can be added or removed from the Work With Member display. See Section 10.1.1.9. **F8** and Page Down let you see the next page. **F3** lets you exit.	
4. Exiting	Press F3	Display Dispatch Board

Done

Printing Member Details

Display Dispatch Board	Start from Display Dispatch Board.
For More Information	For complete step-by-step instructions, see Section 5.1.4.3.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 6, then press Enter.	No change
3. Your Choices	A report will be created. A sample of this report is shown in Section 5.1.4.3, Figure 3.	

Done

Displaying Dispatch History

Display Dispatch Board	Start from Display Dispatch Board.
For More Information	For complete step-by-step instructions, see Section 5.1.4.4.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 7, then press Enter.	Display Member Dispatch History
3. Your Choices	This is a contact log between the Union and the Member. **F21** lets you print the contact log. **F3** lets you exit.	
4. Exiting	Press F3	Display Dispatch Board

Done

Changing Member Data

Display Dispatch Board	Start from Display Dispatch Board.
For More Information	For complete step-by-step instructions, see Section 5.1.4.5.

Steps	Do This	You Will See
1. Displaying	Press **F19**	Work With Open Jobs
2. Your Choices	**F21** lets you print the contact log. **F3** lets you exit. The options available here are the subject of Sections 10.3.1.4.5.1 through 10.3.1.4.5.3.	

Done

Changing Open Job Descriptions

Work With Open Jobs	Start from Work With Open Jobs.
For More Information	For complete step-by-step instructions, see Section 5.1.4.5.1.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Open Job
2. Selecting	Tab down to the desired Job and type a 2, then press Enter.	Edit Dispatch Requirement
3. Your Choices	The changeable fields are those in the lower half of the display. **F4** lets you prompt the Job Code field. **F3** lets you exit.	
4. Changing	Change the desired field(s), press Enter, then press Enter again to confirm.	Work With Open Jobs

Done

Dispatching Qualified Members

Work With Open Jobs	Start from Work With Open Jobs.
For More Information	For complete step-by-step instructions, see Section 5.1.4.5.2.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Open Job
2. Selecting	Tab down to the desired Job and type a 7, then press Enter.	Work With Qualified Members
3. Your Choices	**F21** lets you print a list of qualified Members. Option 1 lets you dispatch a Member. See Section 5.1.4.5.2 for examples. Option 6 lets you print the details for each Member. Option 7 shows you the dispatch history for each Member. Option 8 shows you the details for each Member. Option Q shows you the Qualifications for each Member. **F3** lets you exit.	
4. Exiting	Press **F3.**	Work With Open Jobs

Done

Changing Open Job Qualifications

Work With Open Jobs	Start from Work With Open Jobs.
For More Information	For complete step-by-step instructions, see Section 5.1.4.5.3.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Open Job
2. Selecting	Tab down to the desired Job and type an 8, then press Enter.	Work With Qualifications
3. Your Choices	**F17** lets you display qualified Members. **F21** lets you print a list of qualified Members. **F6** lets you add another Qualification. See Section 5.1.4.5.3 for an example. Option 4 lets you remove a Qualification. **F3** lets you exit.	
4. Exiting	Press **F3.**	Work With Open Jobs

Done

Printing The Board Membership List

Work With
Dispatch Board   Start from Work With Dispatch Board.

For More
Information   For complete step-by-step instructions, see Section 5.1.5.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Board
2. Selecting	Tab down to the desired Job and type a 6, then press Enter.	Dispatch List Type
3. Your Choices	The displayed list type is S for short form. This usually takes only a few minutes to compile. Press Enter to request a short form. Type L to request a long form. This may take several hours to compile. Type B to request both forms. The short form will appear in a few minutes, but the long form may take several hours to compile. **F3** lets you exit.	
4. Printing	Select the desired type, then press Enter and press Enter again to confirm. See Section 5.1.5 for example reports.	Work With Dispatch Board

Done

Displaying Board Details

Work With
Dispatch Board

Start from Work With Dispatch Board.

For More
Information

For complete step-by-step instructions, see Section 5.1.6.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Board
2. Selecting	Tab down to the desired Job and type an 8, then press Enter.	Display Dispatch Board
3. Your Choices	The functions and options available here are discussed in the next 7 sections.	

Done

Displaying Open Jobs

Display Dispatch Board	Start from Display Dispatch Board.
For More Information	For complete step-by-step instructions, see Section 5.1.6.1.

Steps	Do This	You Will See
1. Displaying	Press **F19**	Work With Open Jobs
2. Your Choices	**F21** lets you print a list of all open jobs. **F3** lets you exit. The options are the subject of Sections 10.3.1.4.5.1 through 10.3.1.4.5.3.	
3. Exiting	Press F3	Work With Open Jobs

Done

Printing The Member List

| Display Dispatch Board | Start from Display Dispatch Board. |
| For More Information | For complete step-by-step instructions, see Section 5.1.6.2. |

Steps	Do This	You Will See
1. Printing	Press **F21**.	Dispatch List Type
2. Your Choices	The displayed list type is S for short form. This usually takes only a few minutes to compile. Press Enter to request a short form. Type L to request a long form. This may take several hours to compile. Type B to request both forms. The short form will appear in a few minutes, but the long form may take several hours to compile. **F3** lets you exit.	
3. Printing	Select the desired type, then press Enter and press Enter again to confirm. See Section 5.1.5 for example reports.	Work With Dispatch Board

Done

Adding Qualifications

Display Dispatch Board	Start from Display Dispatch Board.
For More Information	For complete step-by-step instructions, see Section 5.1.6.3.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a Q, then press Enter.	Display Member Qualification
3. Your Choices	The Member's Qualifications appear in the displayed list. **F6** lets you add another Qualification. **F3** lets you exit.	
4. Adding	Press **F6.**	Add Member Qualification
5. Your Choices	**F4** lets you prompt for a Qualification Code. The remaining fields are optional and cannot be prompted.	
6. Filling	Fill in the Qualification Code plus any of the other fields, as desired, then press Enter and press Enter again to confirm.	Display Member Qualifications
7. Your Choices	The new Qualification appears. **F3** lets you exit.	
8. Exiting	Press **F3.**	Display Dispatch Board

Done

Displaying Member Details

Display Dispatch Board	Start from Display Dispatch Board.
For More Information	For complete step-by-step instructions, see Section 5.1.6.4.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 5, then press Enter.	DISPLAY MEMBER PAGE 1
3. Your Choices	Press either Page Down or **F8** to see Page 2. Screen Print lets you print a copy of this display. **F3** lets you exit.	
4. Exiting	Press **F3.**	Display Dispatch Board

Done

Printing Member Details

Display Dispatch Board	Start from Display Dispatch Board.
For More Information	For complete step-by-step instructions, see Section 5.1.6.5.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 6, then press Enter.	No changes
3. Your Choices	See Section 5.1.6.5, Figure 4 for an example report.	

Done

Displaying Member Dispatch History

Display Dispatch Board	Start from Display Dispatch Board.
For More Information	For complete step-by-step instructions, see Section 5.1.6.6.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 7, then press Enter.	Display Member Dispatch History
3. Your Choices	This is a list of all dispatch contact with the selected Member. Option 4 lets you delete history items. **F21** lets you print a list of this Member's dispatch history. **F3** lets you exit.	
4. Exiting	Press **F3.**	Display Dispatch Board

Done

Posting Members To Boards

User Application Menu	Start from User Application Menu .
For More Information	For complete step-by-step instructions, see Section 5.2.

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Member Dispatch	Tab Down to Member Dispatch, type a 1, and press Enter.	Run Application SubMenu
3. Post Members	Key in a 1 beside Post Members To Board.	Post Members

Done

Adding Member Qualifications

Post Members   Start from Post Members.

For More
Information   For complete step-by-step instructions, see Section 5.2.1.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a Q, then press Enter.	Display Member Qualifications
3. Your Choices	The Member's Qualifications appear in the displayed list. **F6** lets you add another Qualification. **F3** lets you exit.	
4. Adding	Press **F6.**	Add Member Qualification
5. Your Choices	**F4** lets you prompt for a Qualification Code. The remaining fields are optional and cannot be prompted.	
6. Filling	Fill in the Qualification Code plus any of the other fields, as desired, then press Enter and press Enter again to confirm.	Display Member Qualifications
7. Your Choices	The new Qualification appears. **F3** lets you exit.	
8. Exiting	Press **F3.**	Post Members

Done

Removing Members From The Board

Post Members   Start from Post Members.

For More   For complete step-by-step instructions, see Section 5.2.2.
Information

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type an R, then press Enter.	UnPost Member From Board
3. Your Choices	Enter lets you unpost the Member. **F3** lets you exit.	
4. UnPosting	Press Enter, then press Enter again to confirm.	Post Member

Done

Posting Members To The Board

Post Members   Start from Post Members.

For More
Information   For complete step-by-step instructions, see Section 5.2.3.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 1, then press Enter.	Post Member To Board
3. Your Choices	The Board Code, Board Status Code, Dispatch Phone Number and Date Posted fields can be changed. **F4** lets you prompt for the Board Code and Board Status Code. **F3** lets you exit.	
4. Filling	Fill in the desired fields, prompting where necessary, then press Enter and press Enter again to confirm.	Post Members

Done

Changing Board Member Details

Post Members   Start from Post Members.

For More   For complete step-by-step instructions, see Section 5.2.4.
Information

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 2, then press Enter.	Change Board Sequence
3. Your Choices	All of the fields from Board Code down to Date Dispatched can be changed. **F4** lets you prompt for the codes. **F3** lets you exit.	
4. Changing	Change the desired fields, prompting where necessary, then press Enter and press Enter again to confirm.	Post Members

Done

Printing Board Member Details

Post Members   Start from Post Members.

For More
Information   For complete step-by-step instructions, see Section 5.2.5.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 6, then press Enter.	No changes
3. Your Choices	See Section 5.2.5, Figures 4 and 5 for examples.	

Done

Displaying Member Dispatch History

Post Members   Start from Post Members.

For More   For complete step-by-step instructions, see Section 5.2.6.
Information

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 7, then press Enter.	Display Member Dispatch History
3. Your Choices	Option 4 lets you delete Dispatch History records **F21** lets you print a list of this Member's Dispatch History. **F3** lets you exit.	
4. Exiting	Press **F3.**	Post Members

Done

Displaying Member Details

Post Members   Start from Post Members.

For More
Information   For complete step-by-step instructions, see Section 5.2.7.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type an 8, then press Enter.	DISPLAY MEMBER PAGE 1
3. Your Choices	Press either Page Down or **F8** to see Page 2. Screen Print lets you print a copy of this display. **F9** lets you display the Member's board sequence by Qualification. **F3** lets you exit.	
4. Exiting	Press **F3.**	Post Members

Done

Working With Dispatch Requests

User Application
Menu   Start from User Application Menu .

For More
Information   For complete step-by-step instructions, see Section 5.3.

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Member Dispatch	Tab Down to Member Dispatch, type a 1, and press Enter.	Run Application SubMenu
3. Dispatch Requests	Key in a 1 beside Work With Dispatch Requests	Work With Dispatch Requests

Requests	Dispatch Request.	

Done

Adding New Dispatch Requests

Work With Dispatch Requests	Start from Work With Dispatch Requests.
For More Information	For complete step-by-step instructions, see Section 5.3.1.

Steps	Do This	You Will See
1. Adding	Press **F6.**	Add Dispatch Request
2. Your Choices	The Source Code refers to the Employer. The Employee Request Number would normally be provided by the Employer. The Request Reference is meant for your own label. The Contact Name and Contact Phone Number would normally be attached to the Source Code, and may be typed in manually. **F4** lets you prompt for Source Codes.	
3. Filling	Fill in the fields, prompting where necessary, then press Enter and press Enter again to confirm.	Work With Dispatch Requests

Done

Displaying Dispatch Request History

Work With Dispatch Requests	Start from Work With Dispatch Requests.
For More Information	For complete step-by-step instructions, see Section 5.3.2.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Request
2. Selecting	Tab down to the desired Dispatch Request and type an H, then press Enter.	Work With Dispatch Request History
3. Your Choices	The Member who accepted this dispatch appears as a Dispatch Record. If any Members had refused this Request, had been left a message without returning their call, or if there had been no answer when they were called, their names would appear here as well. Option 4 lets you delete dispatch record, if necessary. **F3** lets you exit.	
4. Exiting	Press **F3.**	Work With Dispatch Requests

Done

Changing Dispatch Requests

Work With Dispatch Requests	Start from Work With Dispatch Requests.
For More Information	For complete step-by-step instructions, see Section 5.3.3.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Request
2. Selecting	Tab down to the desired Dispatch Request and type a 2, then press Enter.	Edit Dispatch Request
3. Your Choices	The Request Reference, Contact Name, Contact Phone Number, Date Received and Request Status fields can be changed. Prompting the Status fields brings up a drop box. The option numbers used to select a Status may not be the same as the numbers or characters that fill the field after an option has been selected. **F4** lets you prompt the Request Status field. **F3** lets you exit.	
4. Changing	Change the desired fields, prompting where necessary, then press Enter and press Enter again to confirm.	Work With Dispatch Requests

Done

Deleting Dispatch Requests

Work With
Dispatch Requests

Start from Work With Dispatch Requests.

For More
Information

For complete step-by-step instructions, see Section 5.3.4.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Request
2. Selecting	Tab down to the desired Dispatch Request and type a 4, then press Enter.	Delete Dispatch Request
3. Your Choices	Enter lets you continue. **F3** lets you exit without deleting.	
4. Deleting	Press Enter and press Enter again to confirm.	Work With Dispatch Requests

Done

Displaying Dispatch Requests

Work With Dispatch Requests	Start from Work With Dispatch Requests.
For More Information	For complete step-by-step instructions, see Section 5.3.5.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Request
2. Selecting	Tab down to the desired Dispatch Request and type a 5, then press Enter.	Display Dispatch Request
3. Your Choices	This is a static display: no changes can be made to it. Print Screen lets you create a print-out of this display, if desired. **F3** lets you exit.	
4. Exiting	Press **F3.**	Work With Dispatch Requests

Done

Printing Dispatch Request History

Work With
Dispatch Requests

Start from Work With Dispatch Requests.

For More
Information

For complete step-by-step instructions, see Section 5.3.6.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Request
2. Selecting	Tab down to the desired Dispatch Request and type a 6, then press Enter.	No changes
3. Your Choices	See Section 5.3.6, Figure 4 for an example report.	

Done

Displaying Dispatch Requirements

Work With
Dispatch Requests

Start from Work With Dispatch Requests.

For More
Information

For complete step-by-step instructions, see Section 5.3.7.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Request
2. Selecting	Tab down to the desired Dispatch Request and type an 8, then press Enter.	Work With Dispatch Requirements
3. Your Choices	The functions and option available on this display are the subject of the following sections.	

Done

Adjusting Dispatch Requirements

Work With Dispatch Requirements	Start from Work With Dispatch Requirements.
For More Information	For complete step-by-step instructions, see Section 5.3.7.1.

Steps	Do This	You Will See
1. Adding	Press F6	Add Dispatch Requirements
2. Your Choices	**F4** lets you prompt the Board Code and Job Code fields. **F3** lets you exit.	
3. Filling	Fill in the fields, prompting where necessary, then press Enter and press Enter again to confirm.	Work With Dispatch Requirements

Done

Changing Dispatch Requirements

Work With Dispatch Requirements	Start from Work With Dispatch Requirements.
For More Information	For complete step-by-step instructions, see Section 5.3.7.2.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Requirement
2. Selecting	Tab down to the desired Requirement and type a 2, then press Enter.	Edit Dispatch Requirement
3. Your Choices	The fields in the lower half of the display can be changed. To change the other fields, return to Work With Dispatch Requests and use Option 2. See Section 10.3.3.3, Changing Dispatch Requests **F3** lets you exit.	
4. Changing	Change the desired fields, prompting where necessary, then press Enter and press Enter again to confirm.	Work With Dispatch Requirements

Done

Copying Dispatch Requirements

Work With Dispatch Requirements	Start from Work With Dispatch Requirements.
For More Information	For complete step-by-step instructions, see Section 5.3.7.3.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Requirement
2. Selecting	Tab down to the desired Requirement and type a 3, then press Enter.	Copy Dispatch Requirement
3. Your Choices	The fields from the Number Required down to Start Time can be changed. **F4** lets you prompt for Job Codes, if desired. **F3** lets you exit.	
4. Copying	Change the desired fields, prompting where necessary, then press Enter and press Enter again to confirm.	Work With Dispatch Requirements

Done

Deleting Dispatch Requirements

Work With Dispatch Requirements	Start from Work With Dispatch Requirements.
For More Information	For complete step-by-step instructions, see Section 5.3.7.4.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Requirement
2. Selecting	Tab down to the desired Requirement and type a 4, then press Enter.	Delete Dispatch Requirement
3. Your Choices	Enter lets you continue. **F3** lets you exit.	
4. Continuing	Press Enter and press Enter again to confirm.	Work With Dispatch Requirements

Done

Displaying Qualified Members

| Work With Dispatch Requirements | Start from Work With Dispatch Requirements. |

| For More Information | For complete step-by-step instructions, see Section 5.3.7.5. |

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Requirement
2. Selecting	Tab down to the desired Requirement and type a 7, then press Enter.	Working With Qualified Members
3. Your Choices	The functions and options available on this display are discussed in Section 10.3.3.7.6.2.1. **F3** lets you exit.	
4. Exiting	Press F3	Work With Dispatch Requirements

Done

Working With Qualifications

Work With Dispatch Requirements	Start from Work With Dispatch Requirements.
For More Information	For complete step-by-step instructions, see Section 5.3.7.6.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Dispatch Requirement
2. Selecting	Tab down to the desired Requirement and type a 7, then press Enter.	Working With Qualifications
3. Your Choices	The functions and options available on this display are discussed in the following sections	

Done

Adding Qualifications

Work With Qualifications	Start from Work With Qualifications.
For More Information	For complete step-by-step instructions, see Section 5.3.7.6.1.

Steps	Do This	You Will See
1. Adding	Press **F6.**	Select Dispatch Qualifications
2. Your Choices	Option 1 lets you select a Qualification.	
3. Selecting	Type a 1 beside the desired Qualification and press Enter	Select Dispatch Qualifications
4. Your Choices	Select another Qualification or press **F3** to exit.	
5. Exiting	Press **F3.**	Work With Qualifications

Done

Displaying Qualified Members

Work With Qualifications	Start from Work With Qualifications.
For More Information	For complete step-by-step instructions, see Section 5.3.7.6.2.

Steps	Do This	You Will See
1. Displaying	Press **F17**.	Work With Qualified Members
2. Your Choices	The following sections demonstrate how to use the functions and options available on this display.	

Done

Changing Member Data

Work With Qualified Members	Start from Work With Qualified Members.
For More Information	For complete step-by-step instructions, see Section 5.3.7.6.2.1.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 1, then press Enter.	Enter Member Dispatch
3. Your Choices	**F4** lets you prompt the Dispatch Code field. After you have phoned the Member, the Transactions let you record the results of your call **F3** lets you exit.	
4. Filling	Fill in the field, then press Enter and press Enter again to confirm	Work With Qualified Members

Done

Printing Member Details

Work With Qualified Members	Start from Work With Qualified Members.
For More Information	For complete step-by-step instructions, see Section 5.3.7.6.2.2.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 6, then press Enter.	No changes
3. Your Choices	See Section 5.3.7.6.2.2, Figures 4 and 5 for example reports.	

Done

Displaying Dispatch History

Work With
Qualified Members

Start from Work With Qualified Members.

For More
Information

For complete step-by-step instructions, see Section 5.3.7.6.2.3.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 7, then press Enter.	Display Member Dispatch History
3. Your Choices	Option 4 lets you delete Dispatch History records **F21** lets you print a list of this Member's Dispatch History. **F3** lets you exit.	
4. Exiting	Press **F3.**	Work With Qualified Members

Done

Displaying Member Details

Work With Qualified Members	Start from Work With Qualified Members.
For More Information	For complete step-by-step instructions, see Section 5.3.7.6.2.4.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type an 8, then press Enter.	DISPLAY MEMBER PAGE 1
3. Your Choices	Press either Page Down or **F8** to see Page 2. Screen Print lets you print a copy of this display. **F9** lets you display the Member's board sequence by Qualification. **F3** lets you exit.	
4. Exiting	Press **F3.**	Work With Qualified Members

Done

Displaying Member Qualifications

Work With Qualified Members	Start from Work With Qualified Members.
For More Information	For complete step-by-step instructions, see Section 5.3.7.6.2.5.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Qualification and type a Q, then press Enter.	Display Member Qualifications
3. Your Choices	**F6** lets you add Qualifications. **F3** lets you exit.	
4. Exiting	Press **F3.**	Work With Qualified Members

Done

Printing Qualified Members

Work With Qualifications	Start from Work With Qualifications.
For More Information	For complete step-by-step instructions, see Section 5.3.7.6.3.

Steps	Do This	You Will See
1. Printing	Press **F21**.	Select Geographic Code
2. Your Choices	**F4** lets you prompt for Geographic Codes.	
3. Continuing	Fill in the field, prompting it if necessary, then press Enter and press Enter again to confirm.	Work With Qualifications
4. Your Choices	See Section 5.3.7.6.3, Figure 8 for an example report.	

Done

Deleting Qualifications

Work With Qualifications	Start from Work With Qualifications.
For More Information	For complete step-by-step instructions, see Section 5.3.7.6.4.

Steps	Do This	You Will See
1. Searching	Type a Description into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Qualification and type a 4, then press Enter.	Delete Qualification
3. Your Choices	Enter lets you continue. **F3** lets you exit without deleting.	
4. Deleting	Press Enter, then press Enter again to confirm.	Work With Qualifications

Done

Working With Dispatch Reports

User Application Menu	Start from User Application Menu .
For More Information	For complete step-by-step instructions, see Section 5.4.

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Member Dispatch	Tab Down to Member Dispatch, type a 1, and press Enter.	Run Application SubMenu
3. Dispatch Requests	Key in a 1 beside Dispatch Reports	Prompt For Dispatch List
4. Your Choices	**F4** lets you prompt for Board Codes.	
5. Printing	Fill in a Board Code, prompting it if necessary, then press Enter and press Enter again to confirm.	Display Report Qualifications
6. Your Choices	The functions and options on this display are identical to those found in the Work With Qualifications display. See Section 10.3.3.7.6 for more details. The point of this display is to let you print a list of Members who have certain Qualifications without having to create a dummy Request. **F3** lets you exit.	
7. Exiting	Press **F3.**	Run Application SubMenu

Done

4 Conflict (Grievance) Tracking

Working With Conflicts

User Application
Menu

Start from User Application Menu .

For More
Information

For complete step-by-step instructions, see Section 6.1.

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Conflict Tracking	Tab Down to Conflict (Grievance) Tracking, type a 1, and press Enter.	Run Application SubMenu
3. Conflicts	Key in a 1 beside Work With Conflicts.	Work With Conflicts

Done

Adding New Conflicts

Work With Conflicts	Start from Work With Conflicts.
For More Information	For complete step-by-step instructions, see Section 6.1.1.

Steps	Do This	You Will See
1.		
2.		
3.		

Done

Changing Conflict Details

Work With
Conflicts

Start from Work With Conflicts.

For More
Information

For complete step-by-step instructions, see Section 6.1.2.

Steps	Do This	You Will See
1.		
2.		
3.		
4.		

Done

Displaying Conflict Details

Work With
Conflicts

Start from Work With Conflicts.

For More
Information

For complete step-by-step instructions, see Section 6.1.3.

Steps	Do This	You Will See
1.		
2.		
3.		
4.		

Done

Working With Conflict Details

Work With Conflicts	Start from Work With Conflicts.
For More Information	For complete step-by-step instructions, see Section 6.1.4.

Steps	Do This	You Will See
1.		
2.		
3.		
4.		

Done

5 Member Arrears Report

Creating An Arrears List

User Application Menu	Start from User Application Menu .
For More Information	For complete step-by-step instructions, see Section 7.1.

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Arrears	Tab Down to Member Arrears Report, type a 1, and press Enter.	Run Application SubMenu
3. Create List	Key in a 1 beside Create Member Arrears List.	Print Member Arrears
4. Your Choices	The purpose of this window is to let you select a cut-off date, and then generate a new list.	
5. Continuing	Fill in a Year and Month, then press Enter and press Enter again to confirm.	Your screen will become temporarily frozen for a few minutes as the new list is generated. Afterwards, your display will return to the Run Application Menu.

Done

Working With The Member Arrears List

Run Application Menu	Start from Run Application Menu.
For More Information	For complete step-by-step instructions, see Section 7.2.

Steps	Do This	You Will See
1. Selecting	Type a 1 beside Work With Arrears List, then press Enter.	Work With Arrears List
2. Your Choices	This display will be the starting point for the next 6 sections.	

Done

Deleting Members From The Arrears List

Work With
Arrears List   Start from Work With Arrears List.

For More
Information   For complete step-by-step instructions, see Section 7.2.1.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 4, then press Enter.	Delete Member From List
3. Your Choices	Enter lets you continue. **F3** lets you exit without deleting.	
4. Deleting	Press Enter and press Enter again to confirm.	Work With Arrears List

Done

Displaying Member Arrears Details

Work With
Arrears List

Start from Work With Arrears List.

For More
Information

For complete step-by-step instructions, see Section 7.2.2.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 5, then press Enter.	DISPLAY MEMBER PAGE 1
3. Your Choices	Press either Page Down or **F8** to see Page 2. Screen Print lets you print a copy of this display. **F9** lets you display the Member's board sequence by Qualification. **F3** lets you exit.	
4. Exiting	Press **F3.**	Work With Arrears List

Done

Printing Member Arrears Details

Work With Arrears List	Start from Work With Arrears List.
For More Information	For complete step-by-step instructions, see Section 7.2.3.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 6, then press Enter.	No changes
3. Your Choices	See Section 7.2.3, Figure 4 for an example report.	

Done

Working With Member Dues

Work With
Arrears List

Start from Work With Arrears List.

For More
Information

For complete step-by-step instructions, see Section 7.2.4.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type an 8, then press Enter.	Display Member Dues Transactions
3. Your Choices	**F6** lets you enter Member dues.	
4. Adding	Press **F6.**	Enter Member Dues
5. Your Choices	**F4** lets you prompt for Dues Categories.	
6. Prompting	Press **F4.**	Select Dues
7. Your Choices	This is a listing of the available Dues Categories and their details. Option 1 lets you select one of the Dues Categories.	
8. Selecting	Tab down to the desired Dues Category, type a 1, then press Enter.	Enter Member Dues
9. Your Choices	Your entry now appears with a default rate. The default rate can be changed, if necessary. The blank fields to the right of the default rate must be filled.	
10. Filling	Fill in the remaining fields, then press Enter and press Enter again to confirm.	Enter Member Dues

Steps	Do This	You Will See
11. Your Choices	Your entry has been cleared from the screen: it is now in the system.	
	If there are more entries required, press **F6.**	
	If there are no more entries required, press **F3.**	
12. Exiting	Press **F3.**	Print Dues Receipt Prompt
13. Your Choices	Type Y to print a receipt.	
	Type N or press **F3** to escape without printing.	
14. Printing	Press Y	Display Member Dues Transactions
15. Your Choices	Your entry appears, and receipt has been sent to your printer queue. See Section 7.2.4, Figure 14 for an example receipt.	
	F3 lets you exit.	
16. Exiting	Press **F3.**	Work With Arrears Report

Done

Working With Member Notes

Work With Arrears List	Start from Work With Arrears List.
For More Information	For complete step-by-step instructions, see Section 7.2.5.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 9, then press Enter.	Display Member Notes
3. Your Choices	**F6** lets you add a new Note.	
4. Adding	Press F6	Add Member Notes
5. Creating A Note	Type your Note, then press Enter and press Enter again to confirm.	Add Member Notes
6. Your Choices	Your Note will disappear, and the display will be ready for another Note. You can either type another Note, or press **F3** to exit.	
7. Exiting	Press F3	Display MemberNotes
8. Your Choices	Your Note appears along with any other Notes attached to this Agreement. **F6** lets you add another Note. **F3** lets you exit.	
9. Returning	Press F3	Work With Arrears List

Done

Printing Labels From The Arrears List

Work With Deposits	Start from Work With Deposits.
For More Information	For complete step-by-step instructions, see Section 3.2.1.

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Arrears	Tab Down to Member Arrears Report, type a 1, and press Enter.	Run Application SubMenu
3. Print Labels	Key in a 1 beside Print Labels for Arrears List.	Prompt For Label Type
4. Your Choices	**F4** lets you prompt for label types.	
5. Prompting	Press **F4.**	A drop box
6. Your Choices	Type the number next to the format description, i.e., type 1 for Envelope labels.	
7. Selecting	Type the desired number, then press Enter.	Your labels will be sent to your printer queue, and your display will return to the Run Application Menu.

Done

6 Member Tax Receipts

Creating The Tax Receipt File

User Application Menu	Start from User Application Menu .
For More Information	For complete step-by-step instructions, see Section 8.1.

Steps	Do This	You Will See
1. UU	Tab Down to Union Information System , type a 1, and press Enter.	Run Application Menu
2. Arrears	Tab Down to Member Tax Receipt Options, type a 1, and press Enter.	Run Application SubMenu
3. Create File	Key in a 1 beside Create Tax Receipt File.	Create Tax Receipt File
4. Your Choices	There is a warning: take it seriously. If the tax file is created twice is the same tax year by mistake, all relevant data may be lost. The Year is the tax year, not necessarily the current calendar year.	
5. Continuing	Fill in the Year, then press Enter and press Enter again to confirm.	Your screen will become temporarily frozen for a few minutes as the new list is generated. Afterwards, your display will return to the Run Application Menu.

Done

Working With The Tax Receipts File

Run Application Menu	Start from Run Application Menu.
For More Information	For complete step-by-step instructions, see Section 8.2.

Steps	Do This	You Will See
1. Selecting	Type a 1 beside Work With Tax Receipt File, then press Enter.	Work With Tax Receipt File
2. Your Choices	This display will be the starting point for the next 4 sections.	

Done

Editing Tax Receipts

Work With
Tax Receipts

Start from Work With Tax Receipts.

For More
Information

For complete step-by-step instructions, see Section 8.2.1.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 2, then press Enter.	Edit Member Tax Receipt
3. Your Choices	Only the Total Dues Paid and the option of printing a Membership Card are available for changes. If the Member is in Arrears, or if they are not in good standing, the Print Membership Card field will show 0 for void, and their card will not be printed.	
4. Editing	Make any desired changes, then press Enter and press Enter again to confirm.	Work With Tax Receipts

Done

Deleting Tax Receipts

Work With Tax Receipts	Start from Work With Tax Receipts.
For More Information	For complete step-by-step instructions, see Section 8.2.2.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 4, then press Enter.	Delete Member Tax Receipt
3. Your Choices	Enter lets you continue. **F3** lets you exit.	
4. Continuing	Press Enter, then press Enter again to confirm.	Work With Tax Receipts

Done

Working With Member Details

Work With Tax Receipts	Start from Work With Tax Receipts.
For More Information	For complete step-by-step instructions, see Section 8.2.3.

Steps	Do This	You Will See
1. Searching	Type a Name into the search field, or type appropriate search criteria into any of the other search fields, and press Field Exit then Enter.	The Member
2. Selecting	Tab down to the desired Member and type a 2, then press Enter.	DISPLAY MEMBER PAGE 1
3. Your Choices	Press either Page Down or **F8** to see Page 2. Screen Print lets you print a copy of this display. **F9** lets you display the Member's board sequence by Qualification. **F3** lets you exit.	
4. Exiting	Press **F3.**	Work With Tax Receipts

Done

Printing Tax Receipts

Work With Tax Receipts	Start from Work With Tax Receipts.
For More Information	For complete step-by-step instructions, see Section 8.2.4.

Steps	Do This	You Will See
1. Printing	Press **F22**.	Print Tax Forms
2. Your Choices	The Alignment field shows N for "No". Enter lets you print x's on one form page, to check the alignment. You can repeat this alignment test over and over again until you are satisfied. Once satisfied, type Y.	
3. Testing	Press Enter.	One page will print with x's in place of the data.
4. Printing	Type Y, then press Enter.	Work With Tax Receipts.
5. Your Choices	See Section 8.2.4, Figure 5 for an example report.	

Done

Printing Labels For Tax Receipts

Run Application Menu	Start from Run Application Menu.
For More Information	For complete step-by-step instructions, see Section 8.3.

Steps	Do This	You Will See
1. Selecting	Type a 1 beside Print Labels for Tax Receipts, then press Enter.	Prompt For Label Type
2. Your Choices	The Mailing List Format can be either E, for "Envelope"; L, for "standard Labels"; or 2, for "2 labels per row".	
3. Printing	Type the desired label code, then press Enter.	Run Application SubMenu

Done

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