



OLS|3

Branch Secretaries User Guide

Step By Step instructions for Branch Secretaries to
manage the Branch Officers and
Representatives/Committee Members

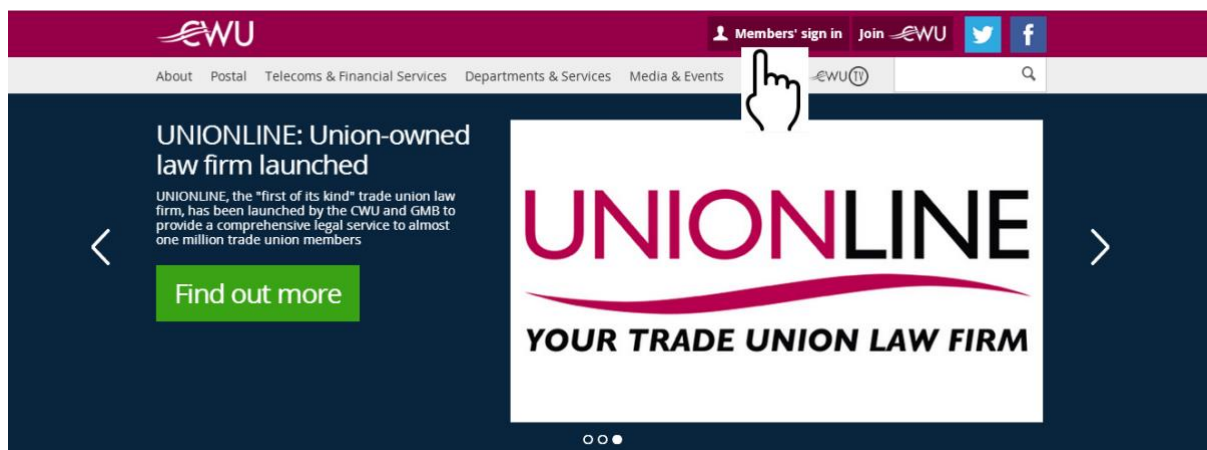
Matt Edwards
Membership Systems Administrator

All **Branch Secretaries** have access automatically.

All users of the system are required to keep all data confidential and secure. Any exported files should be password protected and passwords should be kept secure. Delete old files when you download newer data-files.

Firstly, to begin you will need to log on to the members area of the CWU website.

To do this, click on the “Members sign in” button at the top of the website.







Now enter your Membership Number and Password and log in.

Membership Numbers may start with a 0 and must be at least 9 digits long.

(Your Password was sent to you in the January 2010 issue of the Voice. If you have lost/forgotten it, follow the instructions for Forgot Password on the screen, to receive an automated email containing your password)



Welcome to the CWU - Communication Workers Union

|  Members Login |  Login with your email address? |
|--|---|
| <p>Membership Number*:</p> <input type="text"/> | <p>If you want to login with your email address and password click login button.</p> <p>Login</p> |
| <p>Password:</p> <input type="password"/> | <p> Forgotten your password?</p> <p>If you have forgotten your password click forgot password button (You will need to have an email address that is known to CWU's database to use this service.)</p> <p>Forgot Password</p> |
| <p><small>*Please preface your Membership Number with enough zeros to make it up to 9 digits (e.g. 123456 = 000123456).</small></p> <p>Login</p> | <p> Do you know your login details?</p> <p>CWU members that joined before November 2009 were sent log in details with the January 2010 issue of the Voice Magazine. If you have forgotten/mislaidd those details, use the "Forgotten your password" link above. If you became a CWU member after November 2009 you will need to register for the service by clicking register button.</p> <p>Register</p> |

Congratulations! You are in.



Welcome Mr Data Test1 (not a real member) | [Log Out](#)

[My Details](#) | [Search Members](#) | [Branch Officers/Reps](#)

My Details

[Back to CWU Homepage](#) | [Members Area](#) | [Subscribe to receive LTBs](#)

Edit Your Information

Personal Details

| | |
|--------------|---------------------------|
| Title: | Mr |
| Forename(s): | Data |
| Surname: | Test1 (not a real member) |
| Gender: | Male |
| Ethnicity: | |

Address Details

| | |
|------------------|--|
| Home Address: | Please Provide your home address here, |
| Nominee Address: | |

Email Details

The first thing you will see is an overview of your own membership record with a new link up the top called “Branch Officers/Reps”.

Click it and then click the link for your Branch to see what is now available.



Welcome Mr Data Test1 (not a real member) | [Log Out](#)

[My Details](#) | [Search Members](#) | [Branch Officers/Reps](#)

Branch Officers and Reps


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- 99160 Pretend Branch

OLS|3

CWU, 150 The Broadway, Wimbledon, SW19 1RX
Tel: 0208 971 7447 / Fax: 020 8971 7300 / Text Relay: 1800102089717200 / Email: membership@cwu.org
Developed by **Ambinet**

This is your new Branch Officers/Reps Management Area

Welcome Mr Data Test1 (not a real member) | [Log Out](#)

[My Details](#) | [Search Members](#) | [Branch Officers/Reps](#)

Branch Officers and Reps

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Branch Officers & Reps Proportionality Figures

| | |
|----------|-----|
| BAME | 31% |
| WOMEN | 27% |
| UNDER 30 | 13% |

Branch Proportionality Figures

| | |
|----------|-----|
| BAME | 27% |
| WOMEN | 24% |
| UNDER 30 | 17% |

Total members in Roles 22

 [Export to CSV](#)

Branch Officers and Reps
00 View All Roles

Please enter Membership No.

| Role | Status | Membership | Title | Forename | Surname | Workplace | Employer |
|-----------------------|---------|----------------------------|-------|--------------------|---------------------------|---------------------|--------------------------|
| 01 Branch Chairperson | Current | 1000048365 | Mr | John | Thomas | BT - Stonecroft ATE | British Telecom (EMP) |
| 02 Branch Secretary | Current | cwuhq1 | Mr | Data | Test1 (not a real member) | CWU HQ | CWU (EMP) |
| 03 Branch Treasurer | Current | 030192115 | Mr | Kevin Peter Howard | Jones | HOPE SO | Royal Mail Letters (EMP) |

This Management Area has been set up with several purposes in mind.


The 1st thing you will see are the Branch Proportionality Figures for your Officers and Reps alongside the figures for your Branch Membership demographic, allowing you to get an instant and up-to-date comparison.

You will also see a figure of how many Officers and Reps you have and an option to Export the grid-selection to CSV. The Export lists members 1st by Branch Role (so if a member holds multiple Branch Roles they will show against each). The list is then sorted by Workplace, Surname and Forename(s). This sorting order will allow you to easily Identify the Workplace Reps (10 Health & Safety Reps, 11 Union Learning Reps, 99 CWU Representative/Committee Member).

Further down you will see you have the options to search for a member(s) occupying a particular Branch Role or to search for any member within your branch (in order to assign a Branch Role to them).

Lastly, you will see a grid holding a list of the current Branch Officers and Reps associated to your Branch, in Branch Role order.

Click on the [Membership Number](#) link for a member who is currently in a Role and you will see the following screen:



Welcome Mr Data Test! (not a real member) | [Log Out](#)

[My Details](#)
[Search Members](#)
[Branch Officers/Reps](#)

Assign / Remove Role
 [Back to CWU Homepage](#) | [Members Area](#) | [Subscribe to receive LTBS](#)

Mrs Glenis Jones

Member Details

Membership No: 1000049603
Title: Mrs
Forename(s): Glenis
Surname: Jones
Gender: F
Ethnicity: White UK
Work Place:
Home Email: glenis@Jones2.com
Work Email:
Status: Current

Assign New Role

Please select branch role ▼

Assign

Remove Role


| Remove | Role |
|--------------------------|--------------------------------------|
| <input type="checkbox"/> | 07 Branch Womens Officer |
| <input type="checkbox"/> | 09 Branch Assistant/Deputy Secretary |

Remove

Find another member

Search

Done



CWU, 150 The Broadway, Wimbledon, SW19 1RX
 Tel: 0208 971 7447 / Fax: 020 8971 7300 / Text Relay: 1800102089717200 / Email: membership@cwu.org
 Developed by [Aminet](#)

On the left hand side you will see some info about the member, allowing you to confirm its the correct member whilst on the right hand side you will see the Branch Role(s) that this member currently occuppies.

Assigning/Removing Branch Roles

You simply select the appropriate Branch Role from the list and click to Assign it to the member, or alternatively if you wish to remove a Branch Role from a member who no longer carries it out, tick the box against the appropriate Branch Role, then click Remove.

Once you click Assign/Remove the change you made is written to the database.

This screen also allows you to search for another member (in order to Assign/Remove a Branch Role to them) or to click on Done, in order to go back to the main “Officers/Reps” screen.

Should the change you made affect the Proportionality Figures, then this change will be reflected in the percentage figures showing on the “Branch Officers/Reps” screen.

One other feature, available only to Branch Secretaries, is the option to Assign/Remove a Branch Role from the “Search Members” screen.

You will find an additional icon is set up on this screen for this purpose:

Search Members

Back to CWU Homepage | Members Area | Subscribe to receive LTBs

Name: Email Address:

OLS Permission Level: Membership #:

Membership Status: Employer:

Workplace: OUC Code:

☒ Export to Excel

| Name | Email Address | Joining Date | Membership # | Status | Activity | Edit | View | Role | |
|-------------------------|----------------------------|--------------|--------------|---------|----------|------|------|------|--------------------------|
| Ms Daisy Allsopp | Daisydodah@btinternet2.com | 27 Jun 2011 | 1000036397 | Current | | | | | <input type="checkbox"/> |
| Lord David Attenborough | | 27 Jun 2011 | 1000036403 | Current | | | | | <input type="checkbox"/> |
| Mr Gordon Bennett | GB@sky2.com | 15 Oct 2012 | 1000051013 | Current | | | | | <input type="checkbox"/> |
| Mrs Janice Boscombe | TEST999@BT.COM | 30 Apr 2003 | 030135975 | Current | | | | | <input type="checkbox"/> |
| Sir Tim Buckley | TimBuckley@virgin.net | 22 Apr 2010 | 030192131 | Current | | | | | <input type="checkbox"/> |

Keeping Officers/Reps details up-to-date

We hope that this new Management Area will enable you to keep all the Officers and Reps associated to your Branch completely up-to-date, by providing you with the facility to Assign and Remove Branch Roles, as and when a change occurs. The information for all Branch Officers and Reps is centrally held on the CWU HQ database, which is constantly being updated, meaning that you will be able to check if a Branch Officer/Rep **stops** their CWU Membership, or **retires** from their Employment, so that you can work to find a suitable alternative member who would be willing to take up the Role.

We have provided the Export feature to allow you to view the information in an Excel document. Viewing the Export in Excel will allow you to easily spot any holes in the data, such as **missing** Ethnicities, Date of Births, Email Addresses etc.

We also hope that you will appreciate having instant and up-to-date percentage figures reporting your Branch’s Proportionality figures, and have included this as part of the Proportionality Project being undertaken at CWU HQ.

I hope you find this guide useful, constructive feedback welcome, which should be emailed direct to Matt Edwards at medwards@cwu.org .

Matt Edwards
Membership Systems Administrator
GS Office

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Email: medwards@cwu.org