MUMS 2000

MUMS * Multi-Union Membership System

MUMS/2000 for Windows

32bit Ver 4.xx - November 2002

The Advanced Membership Management System
for Labor Organizations of all sizes.

Reference Manual Part - I

Chapters 1 thru 4

MUMS/2000 Ver 4.00
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Chapter 1

MUMS/2000
Windows Standards

Overview

MUMS/2000 was designed by Van Elgort Information Systems (formerly know as Union Friendly Systems, Inc.) to the be the most advanced membership system available for labor organizations of all sizes. It has been designed exclusively for Windows. This includes Windows 95, 98, ME, 2K, XP. MUMS/2000 is available in single or multi-user versions and can operate on a Novell Network using Windows workstations or a Windows Network.

MUMS/2000 is written using Delphi with Paradox data bases. It uses the Borland Data Base Engine to control the data base and is integrated with Shazam for Windows report writing.

MUMS/2000 is a flexible system that allows the union organization to customize their own coded tables that are used throughout MUMS/2000. MUMS/2000 has three major application areas: Member Information, Dues/Cash Receipts and Grievances.

MUMS/2000 contains its own Quick Report feature. All other reports can be generated by using the integrated Shazam Report Wizard. This feature allows you to store report parameters and layouts for future use and modify those done before to create new ones.

This documentation will start with Windows and MUMS/2000 standards that are used throughout the MUMS/2000 System. This manual is in two Parts, Chapter 1 thru 4 in Part-I and Chapters 5 thru 8 in Part-II.

Menu Items are documented with a “|” between menu and sub-menu items. For example, **Lists|Code Tables|Member General Codes**, means requesting the “Lists” menu, then the “Code Tables” sub-menu, then the “Member General Codes” item from the menu.

A key referred to as "CTRL-M" means holding the CTRL key down while pressing the letter "M".

Windows Standards

In Windows there are often many ways to request the same feature. This might be a special key, menu item, a speed button on a tool bar or a standard windows button.

For example to Exit MUMS/2000, you can double-click on the Windows top left icon, click on the same icon and request close, use ALT-F4, use Menu **File|Exit** or press the exit Speed button from the tool bar. Most users prefer the speed button on the tool bar, while others find use of key combinations quicker.

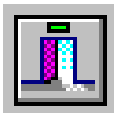
To Exit “MUMS/2000" the following are options:

? Double Click Windows top left icon/button...

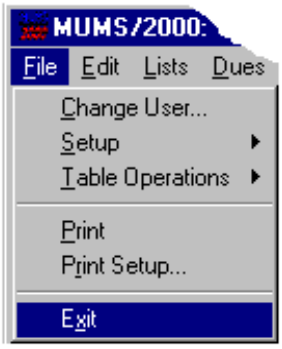
? Click on Windows top left icon/button and request close...

? ALT-F4 Keys...

? MUMS/2000 Tool Bar/Speed Button...



? MUMS/2000 Menu **File|Exit**...



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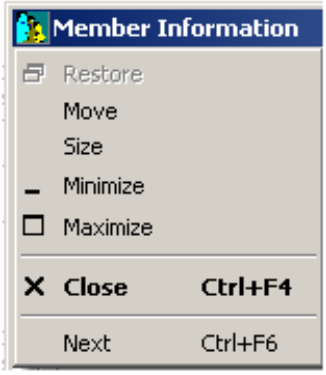
The following is a review of the standard Windows buttons used throughout MUMS/2000.

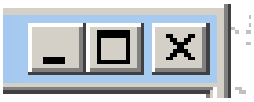
To skip from one field to the next you use the TAB key. The Enter key will activate any key that is highlighted. You can request an item from a menu or tab line by using the Alternate key and the underlined letter.

Clicking on a item will select it or highlight it. In some cases you need to double click to perform a new action such as selecting the record displayed from a list.

To close a window in Windows you can double click on the corner Icon of a windows or hold it for options which include “Close”.



These are the standard Windows buttons to minimize or maximize the screen. In the Windows example the “**X**” is the standard way to close the window.



This is the standard Windows button to re-size the window back to prior state. This is used to reverse a maximize back to standard format. In Windows it is the button in the center.

This is the standard Windows button to pull down a list of coded field values.

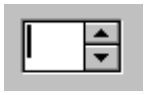
This is the standard Windows scroll bar. This is used to view additional items within the small window. This can be done by moving the square bar, clicking within the range or use of the up and down arrow keys.

This is what is called a check-box.

In Windows the off/false can be blank or a light gray check mark.

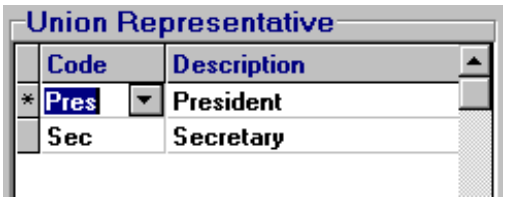
The Windows on/true indicator is a dark check mark.

This windows feature is used to increment or decrement the values. This is called a Spin-button.



Some of the windows features can be used within tables of information (called a grid) as a combination function.

This example is a pull-down table within a grid.

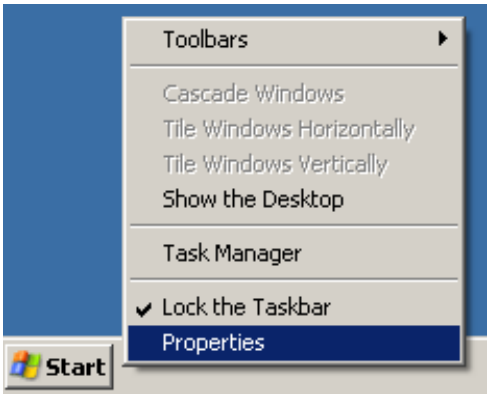


This is an example of a Radio Group. This means you can only pick one item and the others will automatically be un-done, like pushing old fashion car radio buttons.

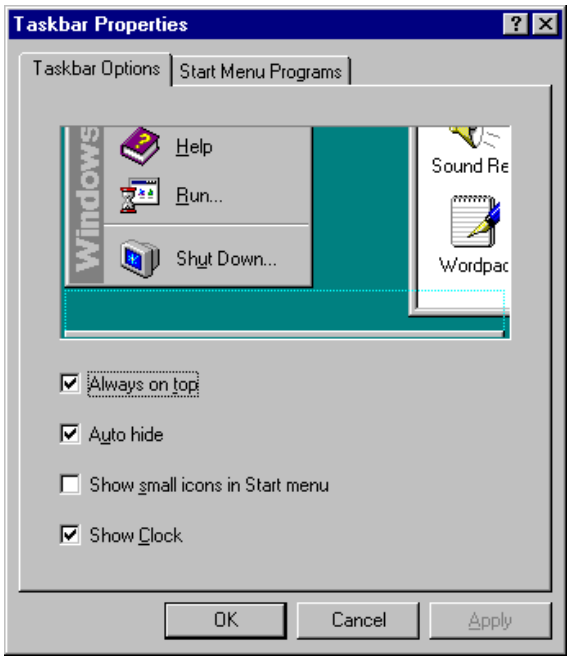
NOTE: Do not change the size of your Windows display fonts too large or some of the MUMS/2000 screens might not be displayed correctly.

Windows Setup

If you Windows screen is set to 640x480, you will need to AUTO-HIDE the Windows status bar in order to view the full MUMS/2000 Windows screens. AUTO-HIDE makes the Windows status bar disappear until you move your cursor to the bottom edge of the screen. Then the bar will appear and you can execute other windows applications.



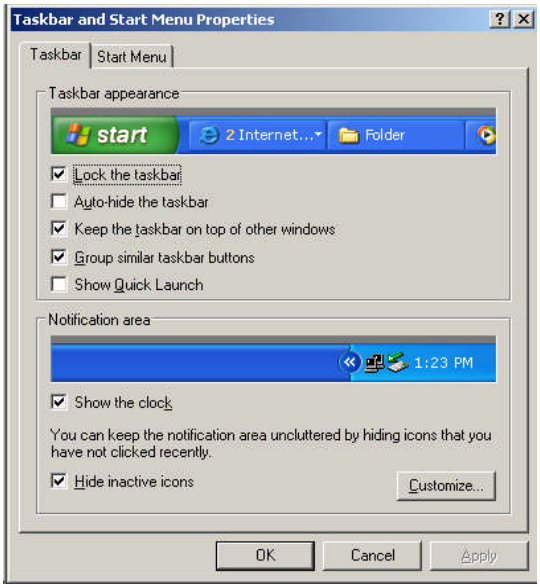
To set the Windows status bar to Auto-hide, click on the task bar in an area that there are no buttons and use the Right Click. Then click on Properties.



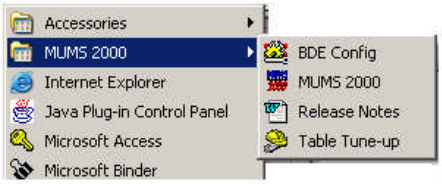
On the Taskbar Properties window click on Auto-hide and OK the change. Various versions of Windows might look different but they all have “Auto-Hide” feature.

Note: If you are set to 800x600 screen or above you do not need to hide the status bar.

This example is the result of clicking on “Properties” from the right click on the taskbar of Windows XP. Notice the similar “Auto-hide the taskbar” item.



Once MUMS/2000 loads it creates a menu item that allows you to run theMUMS2000 program and optionally do other operations.



The standard installation of MUMS/2000 automatically creates an icon on your desktop like this...

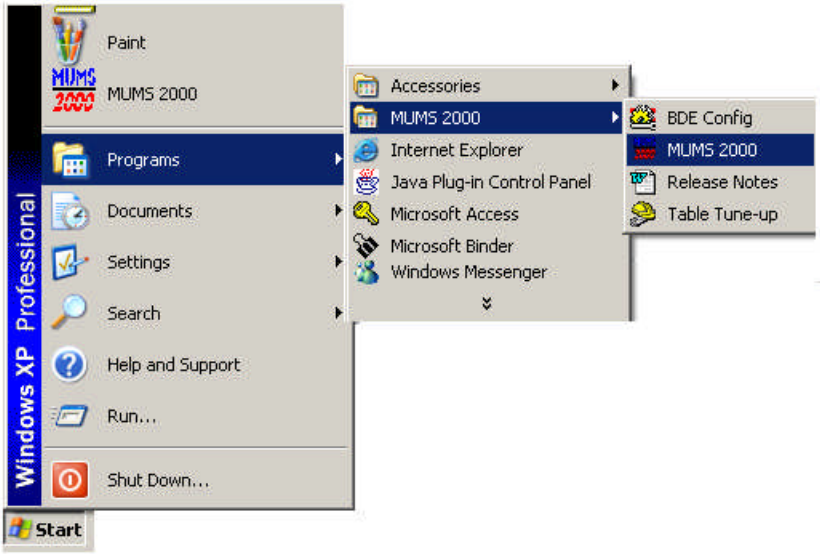
You can add this icon to your start menu by clicking on the icon, holding down the left mouse button and dragging the icon until it is on top of your START button on the Windows taskbar.

This allows you to click on START button or use your Windows menu button on the keyboard and execute MUMS/2000 without having to go back to your desktop screen and without having to go thru the Windows Menu system.

Running MUMS from Windows

After installation, MUMS/2000 Ver 4.00 creates a menu system for you inside Windows.

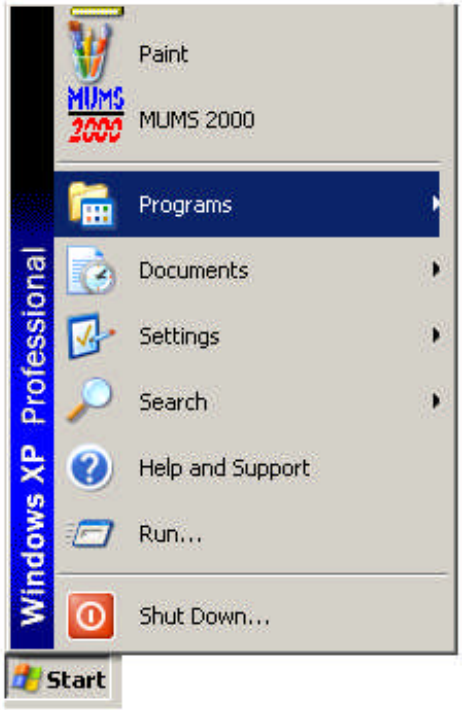
By clicking on START then click on “Programs” or “All Programs” then MUMS 2000 you will see the following items:



- BDE Config — Used to correct drive assignments
- **MUMS/2000** — **RUNNING MUMS/2000 PROGRAM**
- Release Notes — View Current Version Release Notes
- Table Tune-up — Table repair outside of MUMS

You can click MUMS/2000 Icon placed on your desktop.

If you dropped that same Icon on the Start Button, you can run MUMS/2000 by press the start and then clicking on the MUMS/2000 at the top of the menu.



Special Keys

MUMS/2000 uses the following keys or combination of keys to perform the functions noted. Often these same functions can be done from a menu or navigation bar.

ESC	Escape key can be used to cancel changes you have just entered
CTRL-INS	Insert a new record
CTRL-DEL	Delete current record
F11	Skip to Previous record
F12	Skip to Next record
CTRL-E	Skip to Employer Window
CTRL-G	Skip to Grievance Window
CTRL-L	Skip to Work Location Window
CTRL-M	Skip to Member Window
CTRL-R	Skip to Cash Receipts

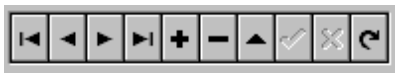
The following is a list of the methods to close a window:

- Use the MUMS/2000 "CLOSE" button.
- Double Click on the top left corner window close.
- Pull down on top left and select Close.
- Use Windows top right "**X**" button.
- CTRL-F4 to close.

To switch to another application while running MUMS/2000 you can use the ALT-TAB key combination. In Windows (if you have auto-hide set) you can also move the cursor to the bottom of the screen to reveal the Windows status line and other applications that are running.

Note: If you double-click on the title bar of a windows it will maximize. If you double-click again it will re-size.

Navigation Bars



This is an example of a full Navigation bar. Items in light gray are not active. This is true with buttons and menu items.

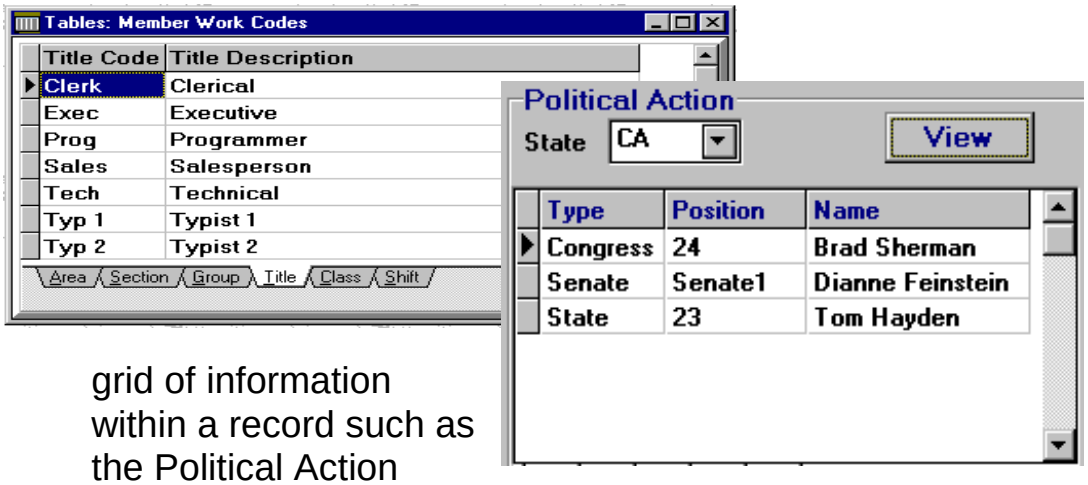
This Navigation bar shows additional features that have been activated after requesting an insert or edit.

Button	**Action**
First Record	Skip to first record in file
Prior Record	Skip to previous record
Next Record	Skip to next record
Last Record	Skip to last record in file
Insert Record	Add a new record to file
Delete Record	Delete current record
Edit Record	Edit or change current record
Post Edit	Save the changes
Cancel Edit	Forget the changes made or Forget the insert new record
Refresh Data	Used in multi-user environment to get a fresh copy of the record being updated by another user.

Common Documentation Terms

In the MUMS/2000 Manual several terms are used that need to be explained:

GRID A Grid is a list of like items within a window. This is most common in table maintenance like the Work Codes below or a



grid of information within a record such as the Political Action Group of information. Grids have a lot in common. You normally use the INS key to add a line, the CTRL-DEL to Delete a line and the ESC to cancel a change. You can also rearrange and resize the columns within the Grid.

DIALOG BOX A Dialog box is a small window that prompts the user for a mandatory response. This might be as small as a confirmation message on a Delete, to a larger more complex box to setup a printer or pick a directory name.

FORM A Form is another name for a Window of information, usually a complete record such as the Employer Information Form or Member Information Form. These might have multiple screens behind them that can be seen with the use of the tabs at the bottom of the form.

MEMO BOX A Memo Box is larger than a field and allows for multiple lines of information that will automatically do a word wrap and might have scroll bars to view all of the information.

Hints and Status Bar

MUMS/2000 displays pop-up hints on Tool Bars, Speed Buttons, Navigation Bars and other system features.

This is an example of a pop-up hint under the Tool Bar.

This is an example of a pop-up hint under a standard button.

This is an example of a pop-up hint under a navigation button.

This pop-up is displayed to remind you that you can retrieve a member record by double-click on the displayed table entry.

This pop-up is displayed to remind you that you can use the CTRL-SPACEBAR for SSN Lookup or Double-Click to skip to member information window. This is shown during the adding of a grievance participant.

The bottom line of MUMS/2000 is a Status Bar.

This is the left section of the status bar. This is used most often to repeat the current pop-up prompt.

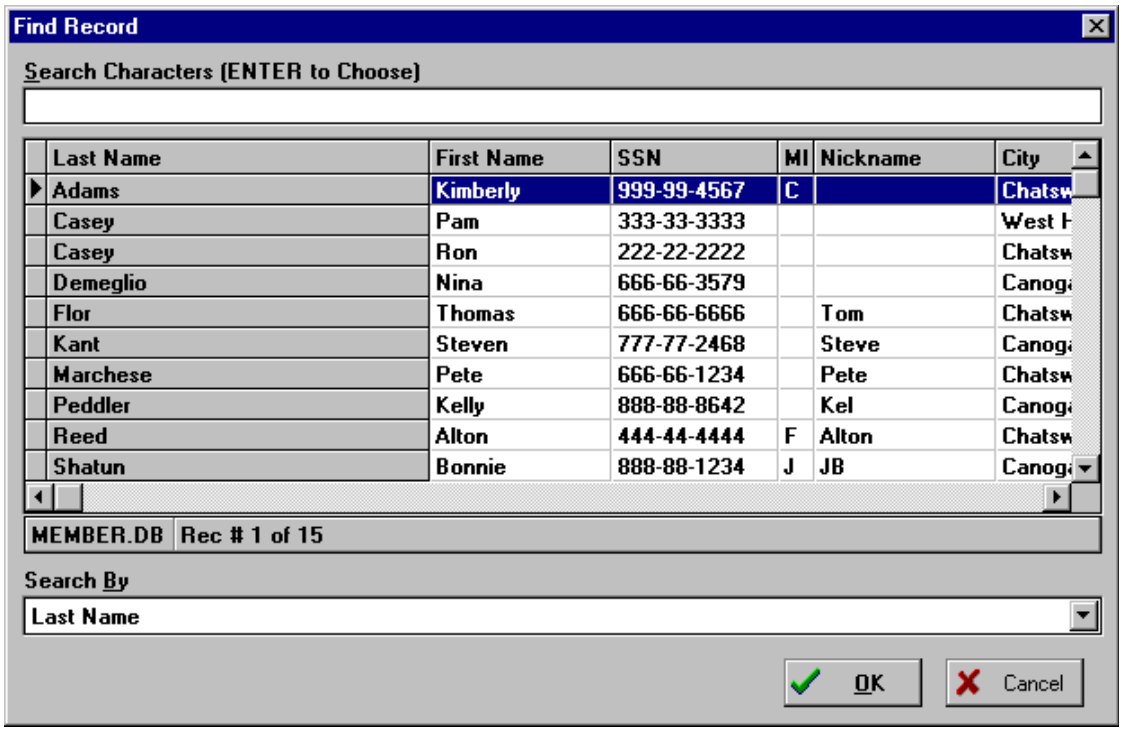
The center of the Status Bar shows the name of the current membership data base.

This is the right portion of the status bar. This shows the number of records in the existing selected portion of the data base, the update status of BROWSE, EDIT, INSERT and which keys are currently on such as NUM and CAPS.

Record Selection Methods

MUMS/2000 has a flexible method to locate and/or select records. These features are found in the Member Information, Grievance Information, Employer Information and Work Location Windows.

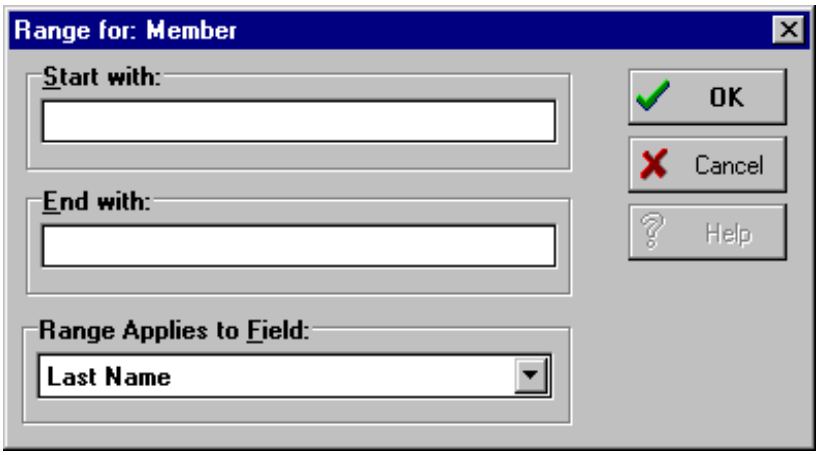
These are the three selection or lookup methods. Find locates a record starting with a value. Range searches between two values and Filter uses a series of criteria to select a group of related records.



This is an example of the FIND feature from within the Member Information window.

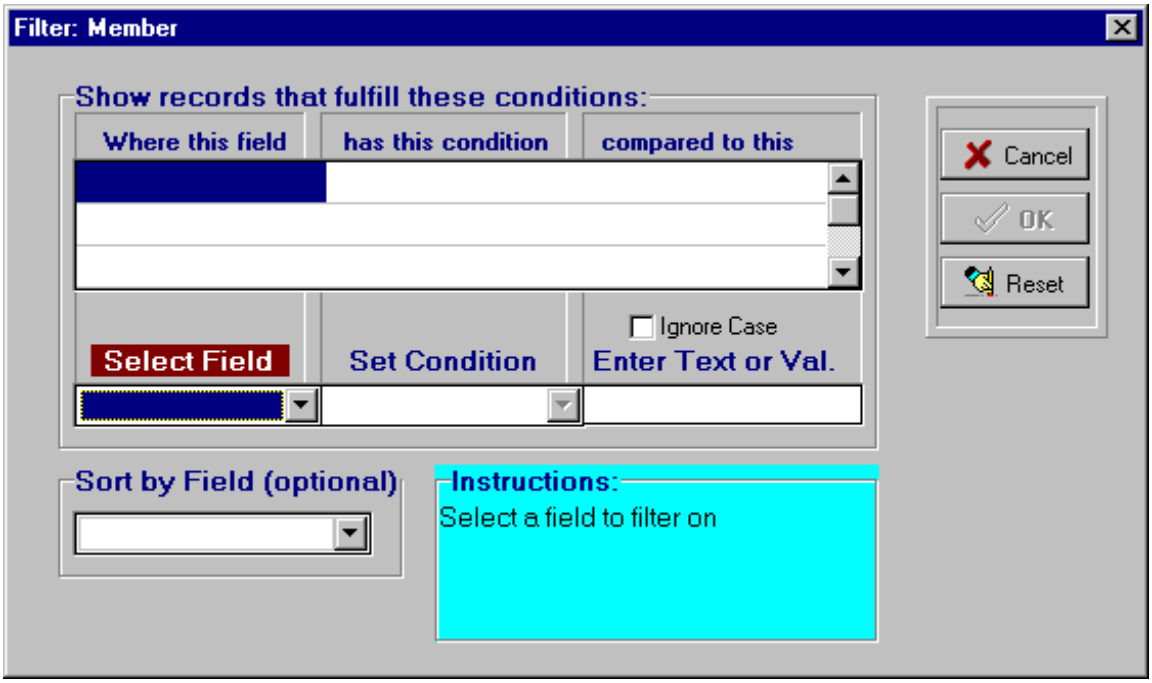
You can enter a value or text to start the search and there is a pull-down option to indicate which field is being searched and how the information is presented.

You can press the ENTER at the record you want to retrieve. The default “Search by” is “Last Name”.



This is an example of using the RANGE function. This allows you to enter a Starting and an Ending value.

You will have the same options of picking which field is being searched.



This is the MUMS/2000 filter windows. From this window you can select a field to be searched from a complete list of all fields within the data base.

Once a field is selected you are then to select a Condition based upon the choices shown. The third field is where you enter the text or value to be compared. You can request multiple search criteria to be used. Once you use the filter method to locate records, the Filter Button will stay pushed in to indicate that you are working with a range in the data base and not the complete data base.

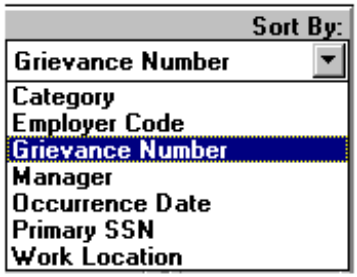
Please Note: **You can learn more on the use of MUMS/2000 FIND and FILTER at the end of this manual in Chapter 8.**

Record Sort Features

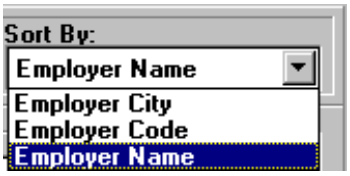
MUMS/2000 allows you to change the sequence of how records are presented. This effects the Navigation Bar and use of the Next and Prior buttons. It also effects "Table Views" which will be discussed next.

These are the sort options for the Member Information Window within MUMS/2000.

These are the sort options for the Grievance Information Window within MUMS/2000.



These are the sort options for the Employer Information Window within MUMS/2000.



These are the sort options for Work Location Information Windows within MUMS/2000

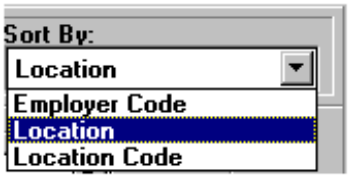
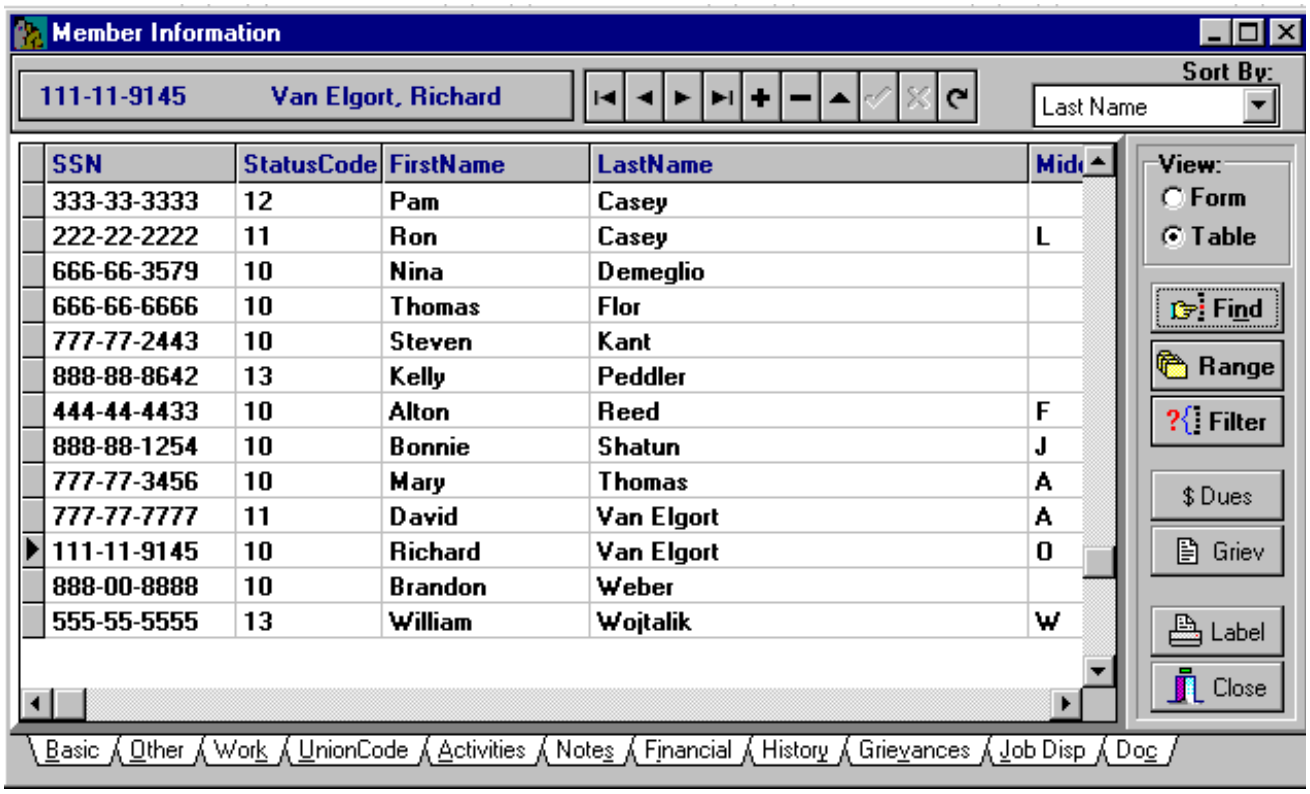


Table of View of Records



Another feature of MUMS/2000 is the Table View of records. These screens show the referenced data base at a glance.

The screen above shows the Table View feature within the Member Information Window. From this screen you can review records, scroll up or down and double-click to retrieve the indicated record. There is also a table view in the Grievance Tracking System.

If you change the sort option the screen will re-display the records using the requested sort sequence. You can scroll to the right to see other fields on the member record.

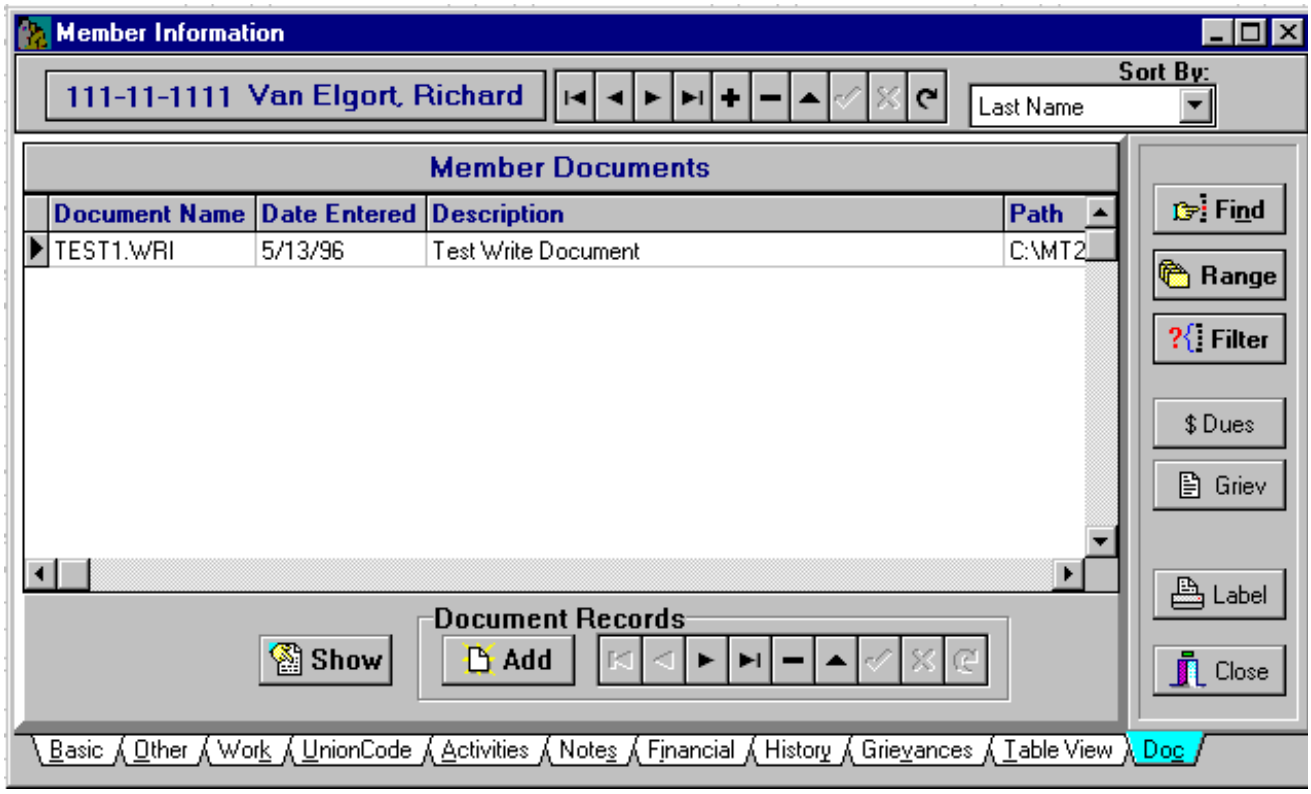
You can use the FILTER to select a group of records. You can rearrange the columns to position different items next to each other. Both the Table View of Member and Table View of Grievances will be referenced later in this documentation.

This is the Radio Button to switch “Form” to “Table View”.

Attached Documents

MUMS/2000 supports attaching any windows document to a Member's record, an Employer or a Grievance.

This allows you to attach a document created in windows or a scanned image of document. You can also attach a photo, voice or even a video clip. The following is the attached window for a member's record.



You can add documents or double-click on the one you wish to review. You can also highlight the document and press the "Show" key.

Once requested, the attached document will be displayed using the appropriate windows program. Once displayed, you can update the document if you wish.

Please Note: **You can learn more on the use of MUMS/2000 Attached Documents at the end of this manual Chapter 8.**

MUMS/2000 Login Screen

The above screen is the MUMS/2000 Login Screen. If your MUMS/2000 is setup for security, the Login dialog box will be the first screen shown when you request MUMS/2000 from Windows.

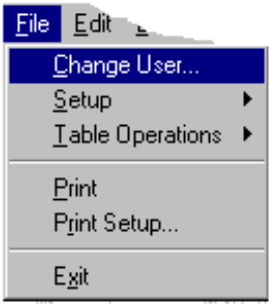
On this screen you are to enter your User Name and Optional Password. These are established within MUMS/2000.

The system is initially shipped with "**MUMS**" as the User Name and no Password.

Once you enter the User Name, use the TAB key to skip to Password and again TAB to the OK button. Once the OK button is highlighted you can press the Enter key or click on the OK.

If you need to change Users, you can re-login without exiting MUMS/2000.

This is done via the MUMS/2000 Menu item
File|Change User



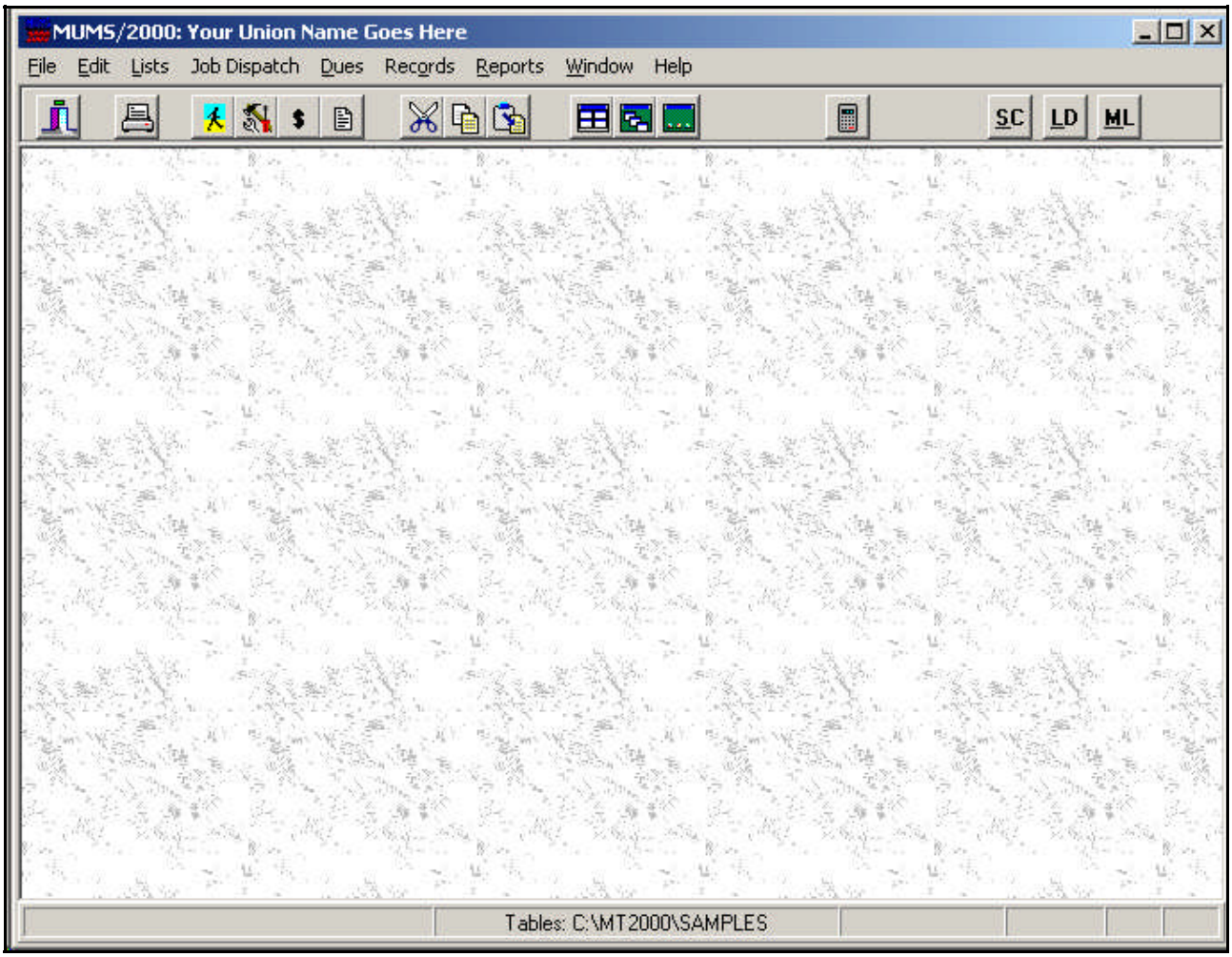
If you request "Change User" from the "File" menu the following will be displayed.

From this screen you can enter the User Name and any Password.

This feature performs the same functions as if you had exited MUMS/2000 and re-executed the program.

Use the File|Table Operations|Password Table to turn security on and off and to establish User Names & Passwords. This program is also used to restrict access to MUMS/2000 functions for a given User name.

MUMS/2000 Menu System

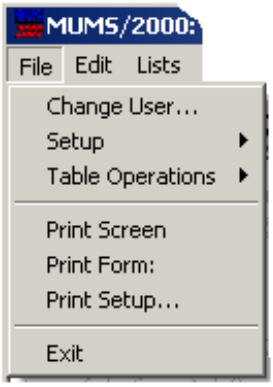


This the MUMS/2000 system screen. This shows an empty window with the MUMS/2000 Title bar showing your organization name, the MUMS/2000 Menu Line and Tool Bar.

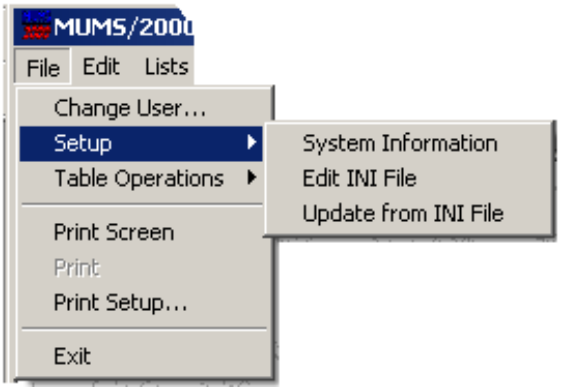
Some items on the Menu are also on the Tool Bar.

The Menu Line Contains:

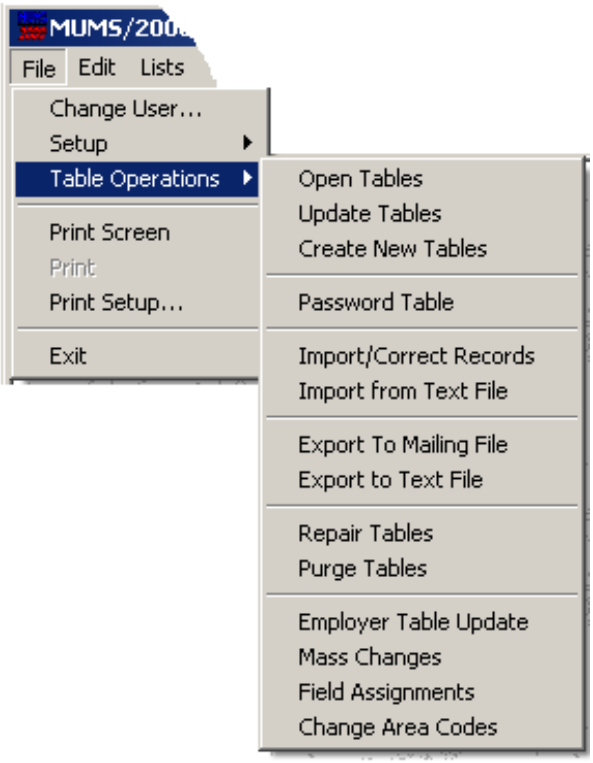
These can be accessed by use of the mouse or the Alt Key plus the letter that is underlined. Job Dispatch is an add-on feature that is documented separately.



This is the **FILE** menu. It is used to change user, run Setup, perform Table Operations, Print, do Print Setup or Exit.

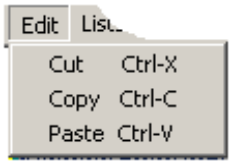


This is the Setup Sub-Menu. It is used to setup System Information Options. This also allows you to Edit the INI file that stores the System Information Options.



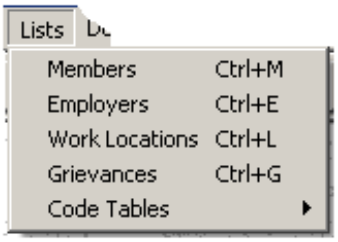
This is the Table Operations Sub-Menu.

The Table Operations will allow you to Open/Change data bases, Import, Purge and/or Update tables. This is also where you maintain the Password Table and do Mass Changes.

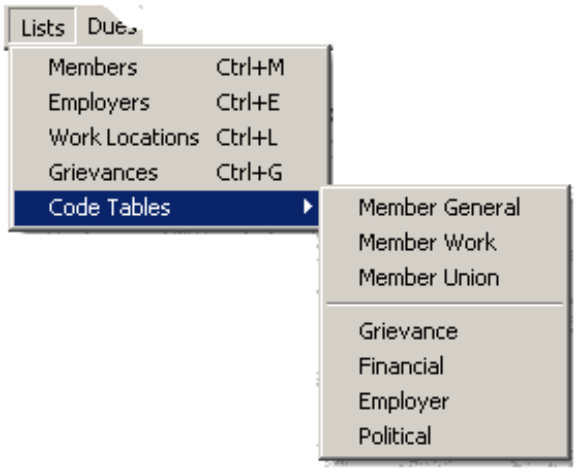


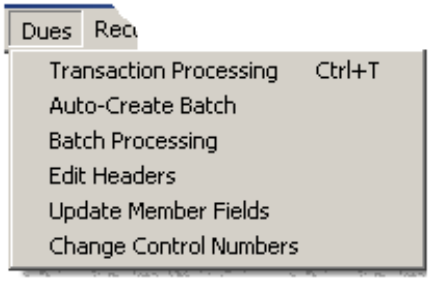
The **EDIT** Menu is the traditional Windows Cut, Copy and Paste. These are also on the Tool Bar.

This is the **LISTS** menu. From here to can enter the Member, Employer, Work Location or Grievance systems. These can be done via the hot key of CTRL-M, E, L, G or use of a Speed Button from the Tool Bar.



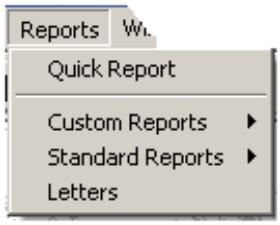
The MUMS/2000 code tables are also maintained from this menu. This is the only way to update the following code tables. Code Tables are used to create valid pull-down choices for coded fields such as Status Code. These define the descriptions behind the codes.



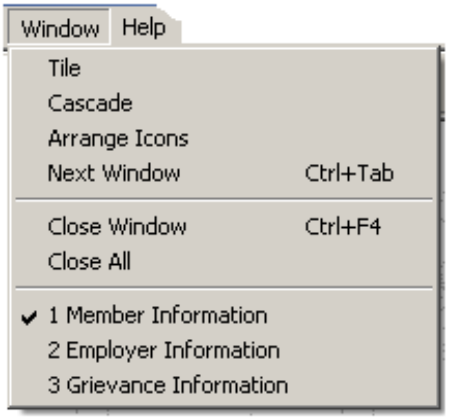


This is the **DUES** menu. From here you can enter the Transaction Processing window. This can also be accessed from a Speed Button on the Tool Bar or the Side Bar. Transactions are posted to a member's record from the "Batch Processing" Menu item. The “Auto Create Batch” is used to create a group of transactions automatically, such as from a check off list.

This is the **RECORDS** menu. This shows the functions that can be performed on a record. Most of these functions are normally performed from a Navigation Bar. The Allow Edit feature can disable updates. The terms used on this menu will change based upon the data base in use.

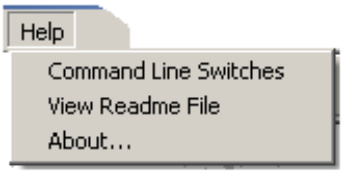


This is the **REPORTS** Menu. This is the only means to enter the Quick Report System. This menu can also be used to link to Shazam Report Wizard to Print a Custom Report, create a New Report or Edit an existing one. These will be reviewed in detail in Chapter 7.



This is the **WINDOW** Menu. It is a standard Windows feature. This is used to change the presentation of windows.

This can be used to close one or all windows. It can be used to skip to an existing window. Several of these functions are on the Tool Bar. The example on the left shows open Member, Employer and Grievance Information Windows



This is **HELP** menu. This is used to enter the future Help system. This menu also has a reminder on the Command Line Switches explained on the next page. Also from this menu you can view the "Readme File". This is the same as the "Release Notes" from the menu. It contains details of what was added in various versions of MUMS/2000.

This is an example of the ABOUT display under the Help Menu.

Please note the Version Number. This will be useful in making sure you are on the most current version of MUMS/2000.

This screen also displays your serial number. If you have a demo copy, the expiration date will be shown.

The Command Line Switches are only used to override standard MUMS/2000 setup. Normally you will never need to use these.

The following is the text from the Command Line Switch display under the Help Menu. The Command Line Switches can be used to customize your copy of MUMS/2000 without having to change the setup.

COMMAND LINE SWITCHES:

You can control the behavior of the program by adding command line switches to the program icon.

To add switches, go to the program icon in the Program Manager and choose File/Properties from the Program Manager menu.

Put in switches at the end of the Command Line box. Switches should be preceded by a space and separated by spaces. Order or case of the characters is not important.

Valid Switches:

T- For IBT users only.
M - Preload Member Information screen.
G - Preload Grievance Information screen.
S - Sound/Video are active.
D - Dues features off.
B - Background and Logo Off.

Preloading a screen means that the program will load the screen automatically when you first run the program.

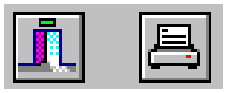
To use sound and video, you must have a sound card and you must have Microsoft Video for Windows installed.

Use the B switch if your monitor does not display correctly.

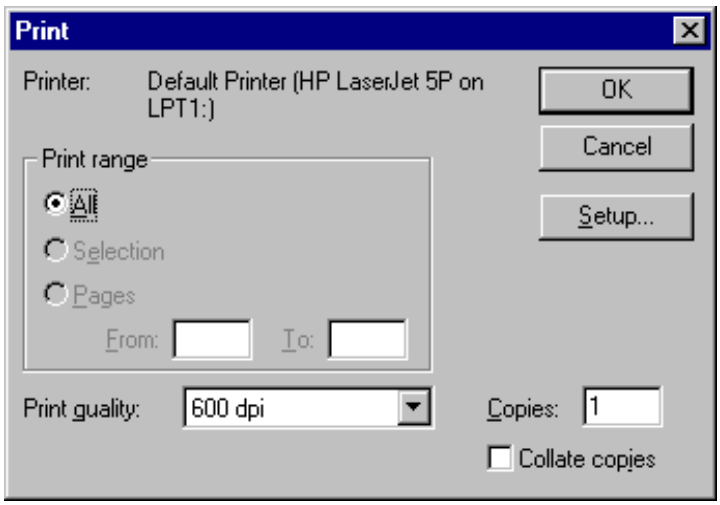
Most of these settings can also be changed from the File/System information form.

MUMS/2000 Tool Bar

This is the Tool Bar. The buttons are in logical groups. Each button has a pop-up hint.

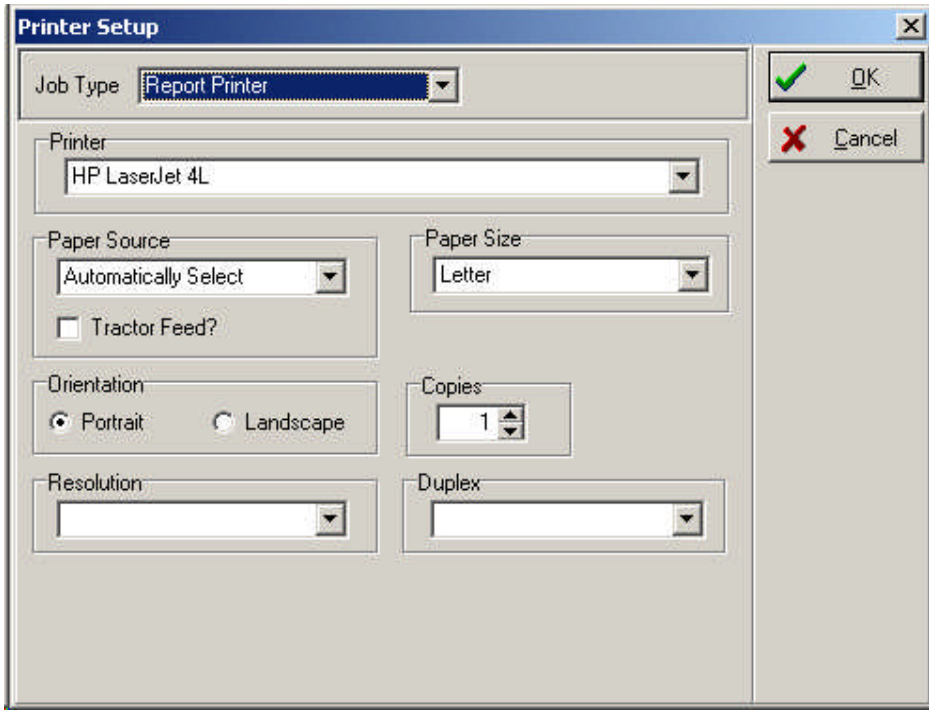


These are the buttons for EXIT and PRINT. The Print is a screen print of the active window. This means that if you have multiple windows open within MUMS/2000, the highlighted-active window would be printed.

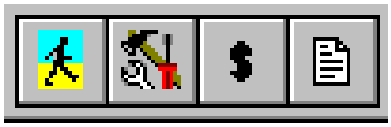


This screen is displayed if you press the Print Button or select Print from the File Menu.

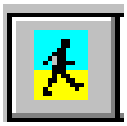
This is the Print Setup Screen that is activated from the Setup button above or the File Menu "Print Setup" for various MUMS printers selected via the “Job Type” button.



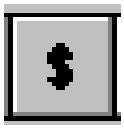
The Options button will activate additional printer options depending upon the type of printer you are using.



These Tool Bar Buttons are the heart of MUMS/2000.

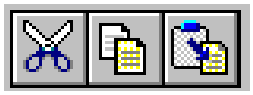
Member Information . . . . . 

Employer Information . . . . .

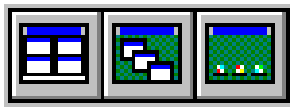
Cash Receipts . . . . . 

Grievances . . . . .

There are often many ways to request the same feature. For example Cash Receipts can be requested from the Menu, from a Speed Button, on the Tool Bar, using the CTRL-R hot key or the Dues button within the Member Information Window on what we call the Side Bar. The same is true with Grievances. There is a Grievance button within the Member Information Windows on the same Side Bar

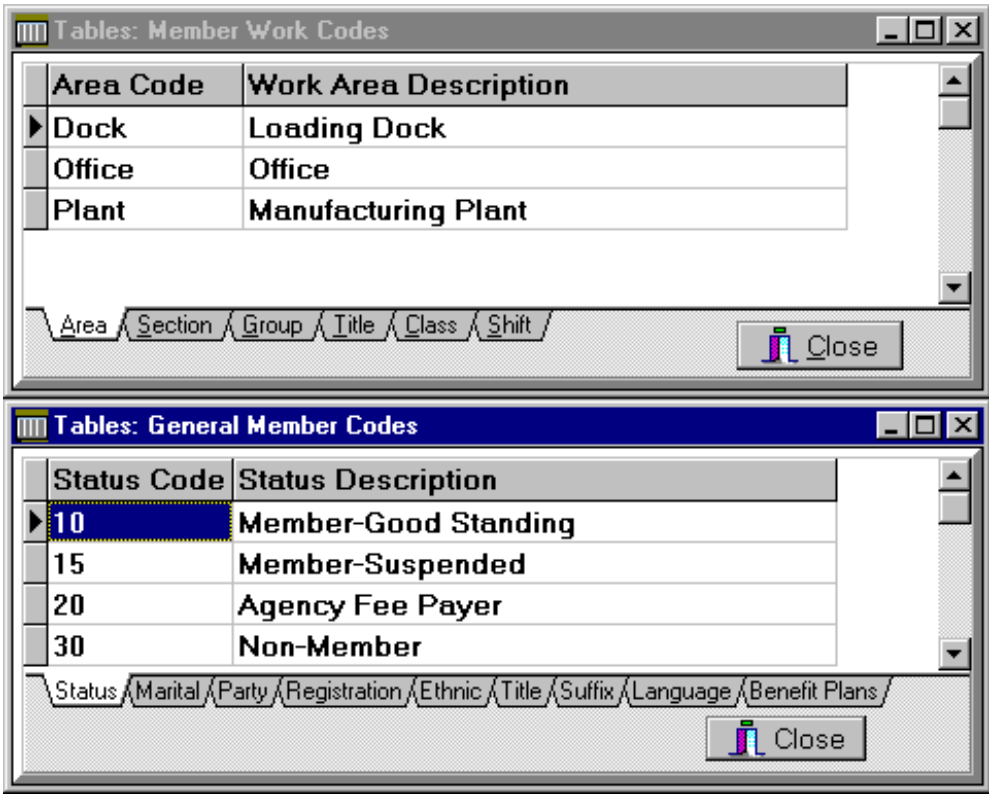


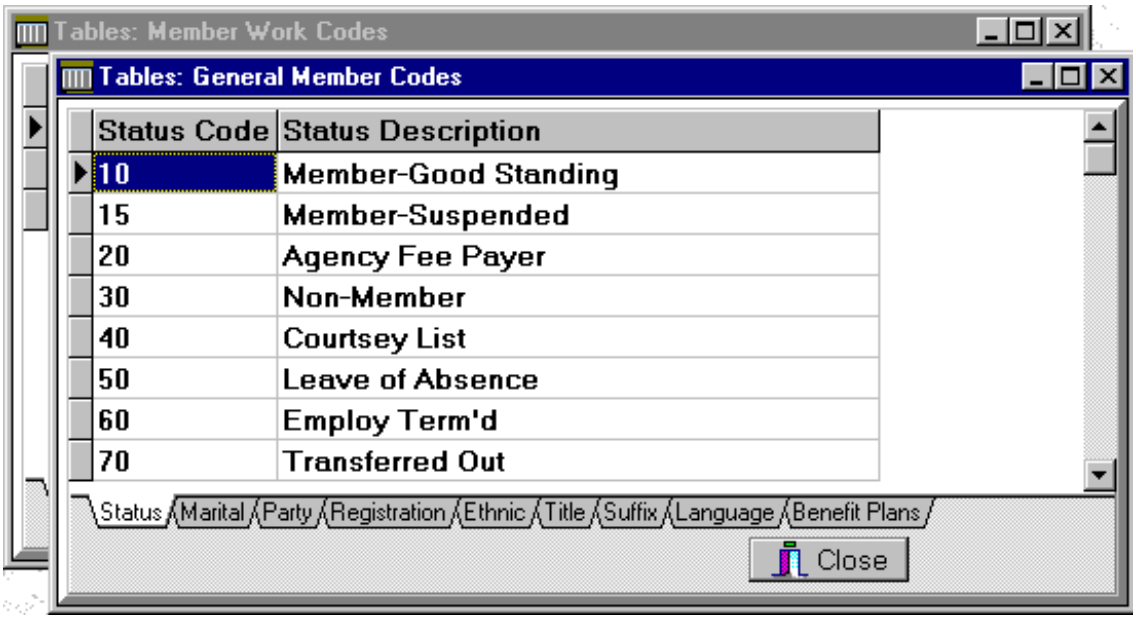
These are the Cut, Copy and Paste Keys that match the items under the EDIT Menu.



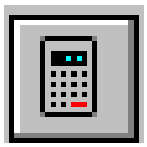
These are the windows of Tile, Cascade and Arrange Icons.

If you have move than one window open you can Tile them and they will look like this.

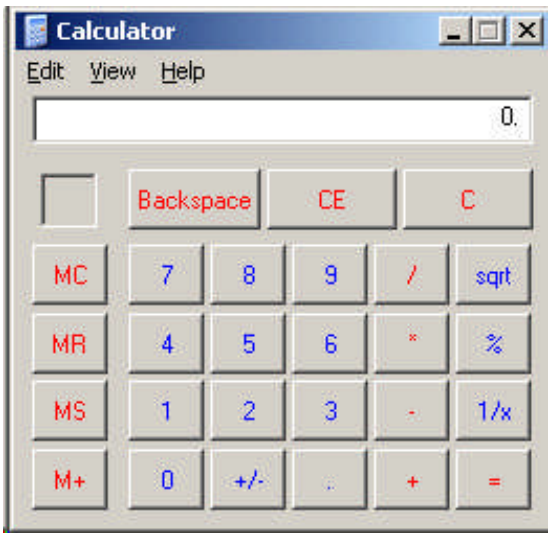




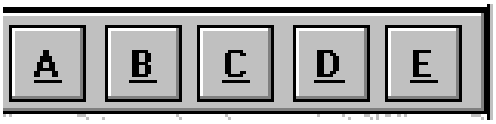
This is what the same windows would look like if you request Tile from the menu or via the speed button.



This button can be used to execute the Windows Calculator. If pressed the following will appear.



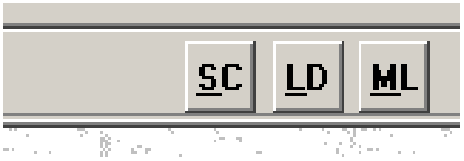
There are five possible user defined speed buttons at the right end of the Tool Bar. These could look like this.



You create these buttons under **Setup|System Information** Speedbutton Tab. This feature is described later in this documentation.

Only if you create a button and complete the execute information will the button be displayed. Your entries will automatically create a pop-up hint for each button you define.

The following is an actual example of MUMS add-on packages that have been setup to do Strike Checks, Local Dues Collection and MUMS*Link.



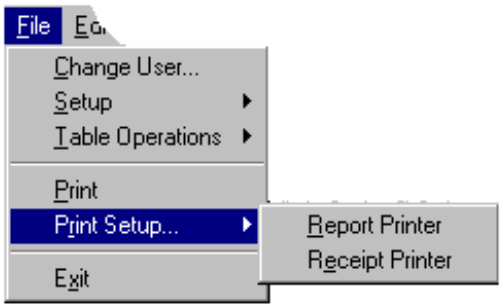
MUMS 2000

Chapter 2

MUMS/2000
System Maintenance

Printer Setup

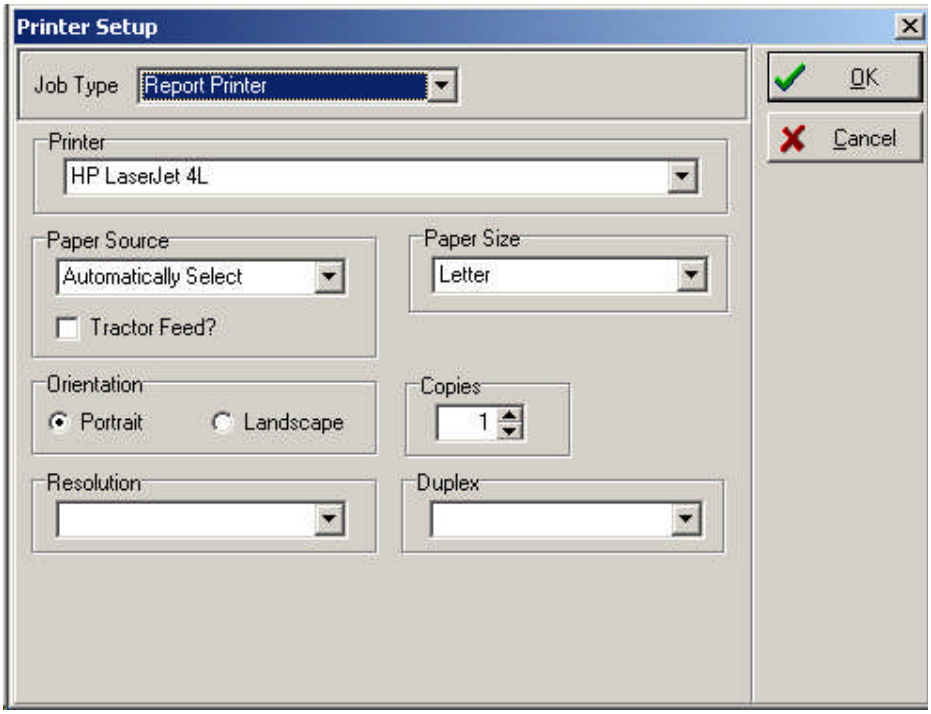
MUMS/2000 Ver 4 requires you to select a Report Printer and optionally a receipt printer.



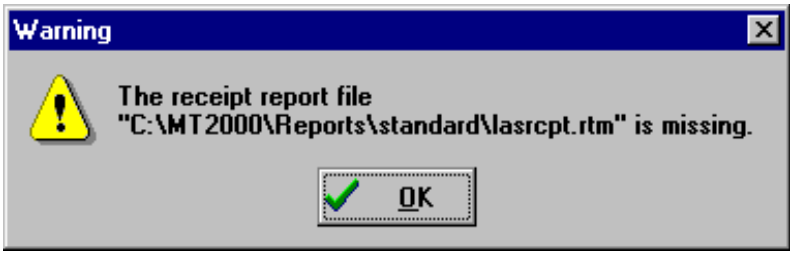
If you attempt to print a report without selecting a printer, this message will be displayed.

When you request to setup a printer, this dialog box will be presented.

Once you setup a printer it will be the default for all "Job Types". If you are going to print to a different printer for a type of Job like Receipts or Screen Prints then you need to select that Job Type and pick a Windows printer.



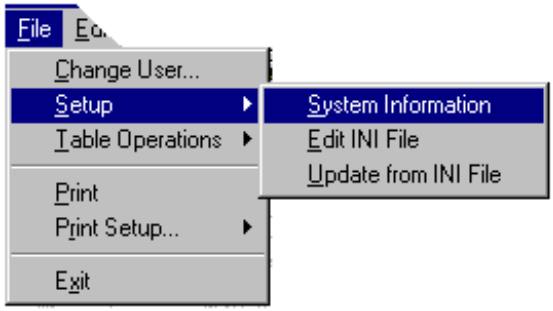
If you try to print a receipt without setup, this warning will be shown.



Remember before you setup a receipt printer, check on the

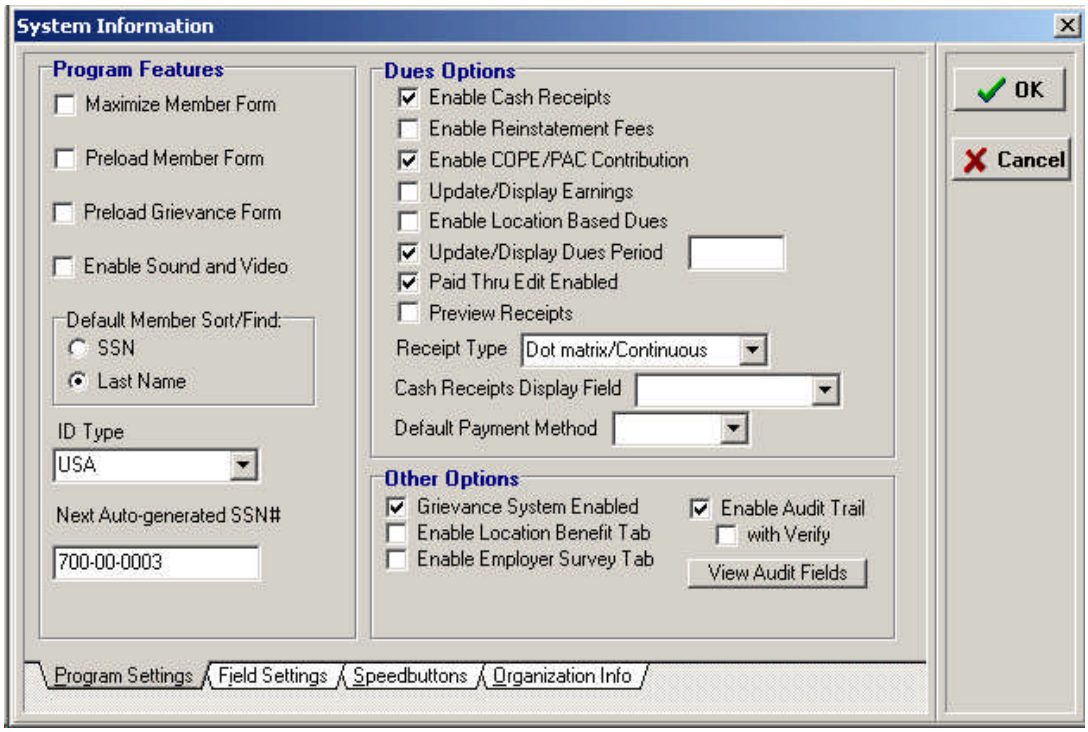
receipt printer type under System Information.

System Options



The System Options screen is executed via the MUMS/2000 Menu of **File|Setup|System Information**.

This is the System Information Screen:



The System Information Screen has four tabs:

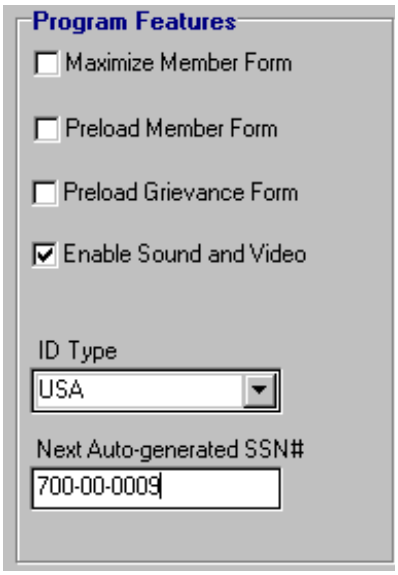
- ? Program Settings
- ? Field Settings
- ? Speedbuttons
- • Organization Info (your local name and union type)

The above screen shows the Program Settings tab with the following groups of system options:

- ? Program Features
- ? Dues Options
- ? Other Options

This is the Program Features Group on the Program Settings tab for System Information.

This is used to tailor the look of MUMS/2000.



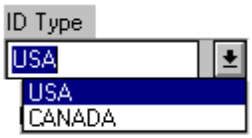
Maximize Member Form This will automatically maximize the Member Information form. This will display larger data and show the member tabs without having to hide the Windows status bar. This might have to be used if you are using larger fonts and the tabs do not appear.

Member Preload Starts with MUMS/2000 with Member Information form open. Also if you close the Member Information form, it will minimize instead for future quick retrieval.

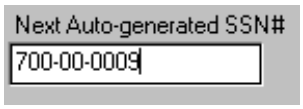
Grievance Preload Starts with Grievance Information form open. This is useful for a site that is using MUMS/2000 mainly for grievance tracking.

Sound and Video Enabled Activates Welcome/Goodbye audio messages.

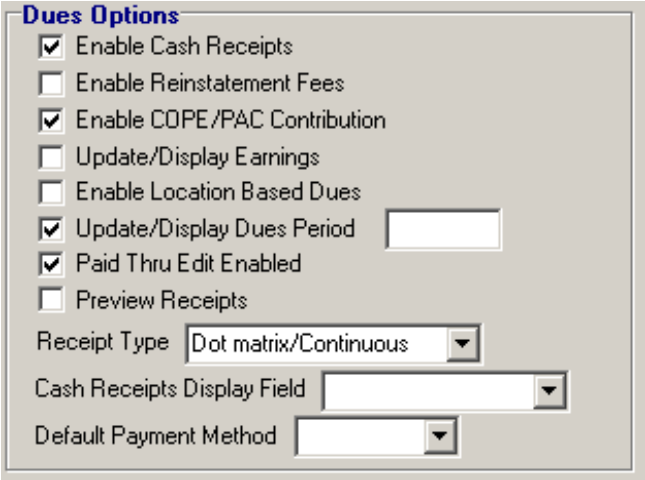
The **ID Type** field is used to indicate if you are using the standard SSN format of 000-00-0000 or the Canadian format for SIN number 000 000 000. MUMS/2000 must be setup one way or the other and that format will hold for all records.



The **Next Auto-generated SSN#** field is used to automatically generate the next dummy number when adding a record that does not have a valid SSN.



Dues Options Group.



Enable Cash Receipts Activates the Dues Menu and buttons. You could turn this off to eliminate all the dues functions if your organization does not post dues.

Enable COPE/PAC Contribution This is activates the COPE/PAC contribution field on a Member's Financial tab and allows for automatic payments during Transaction and/or Auto-Create Batch Processing.

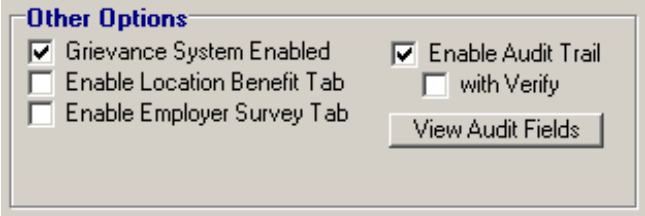
Update/Display Earnings This activates an "Earnings" quarterly summary group on a Member's Financial Tab. This is also used to activate fields to capture earnings information.

Enable Location Based Dues This is used to activate the DUES tab on a Work Location record. This then allows for location dues and individual custom variations of location dues. This effects the Transaction and Auto-Create Batch processing.

Receipt Type Option to denote type of dues receipt being used.

Preview Receipts Option to request Preview Receipts.

Other Options Group:



Grievance System Enabled — This activates the Grievance system, menu and buttons.

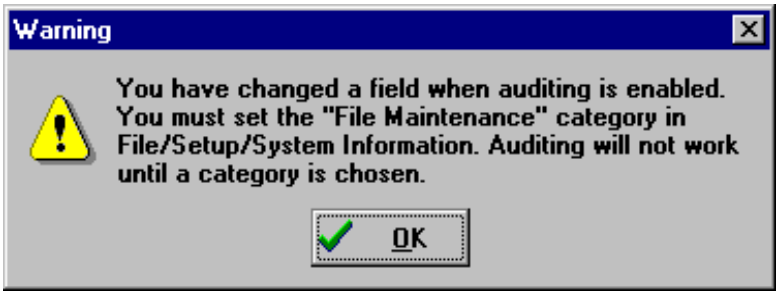
Enable Location Benefit Tab — This activates the Benefit information tab within a Work Location Form.

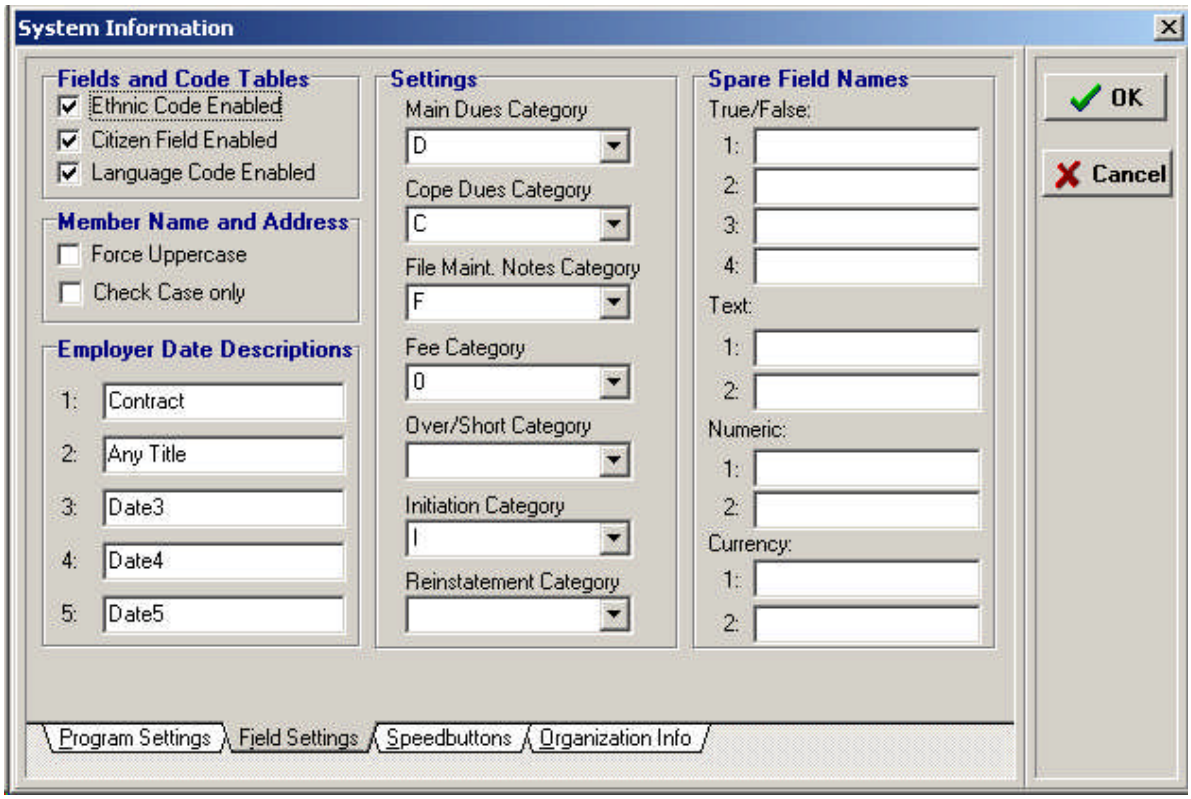
Enable Employer Survey Tab — This activates the Employer Survey Tab and all the functions contained within the Survey system.

Enable Audit Trail — This activates the automatic creation of audit trail notes when certain key fields in a member's record are changed.

With Verify — The With Verify option can be used if you wish to verify and/or edit the automatic audit trail and audit trail date. The date will default to today's date.

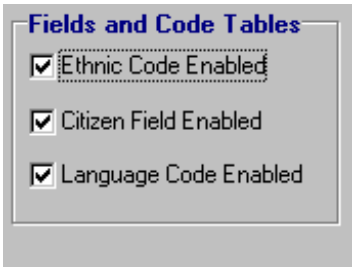
Please note that you must establish a File Maint Notes Category prior to using audit trail. You will get the following message if you change audit information, enabled the audit trail but did not setup a File Maint Notes Category as explained on the next page.





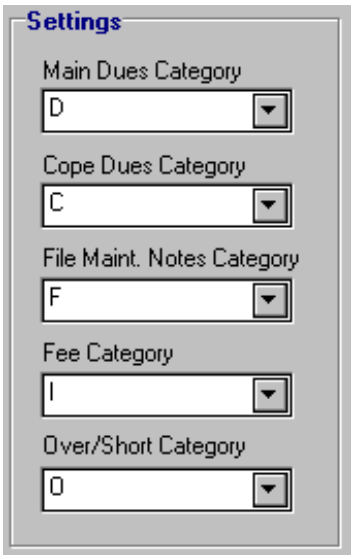
This is the Field Settings Tab. This contains the following groups of options:

- ? Fields & Code Tables
- ? Employer Date Fields
- ? Settings
- ? Spare Field Names

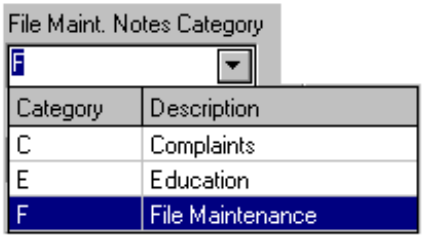


This is the Fields & Codes Tables group. This allows you to activate the Ethnic, Citizen and Language Code Fields on the member information form. This will also activate the Ethnic and Language code tables found under LISTS menu.

This is the "Employer Date Descriptions" group. This allows you to customize the descriptions that precede the five date fields on an Employer's Record. This is used to assist you in putting the same date information on each employer in the same place, making future reports much easier.

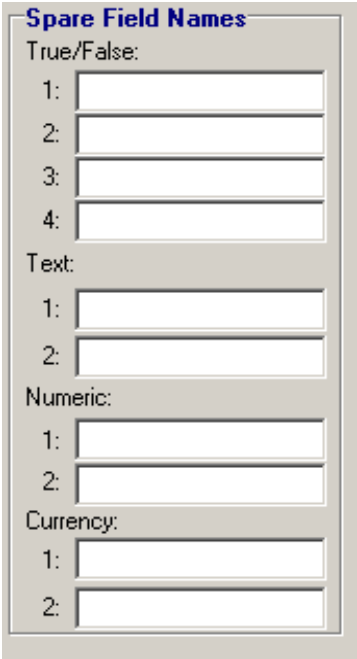


The Settings group is used mostly to denote dues category for specific functions that are unique to a given union. You will be told via other documentation if you need to set these fields.



The "File Maint Notes Category", however, is also used for the automatic Audit Trail feature mentioned before.

You use this category to determine which category you wish audit trail records to be put when the automatic notes are generated. These Note Categories are maintained under the LISTS menu and will be described later.

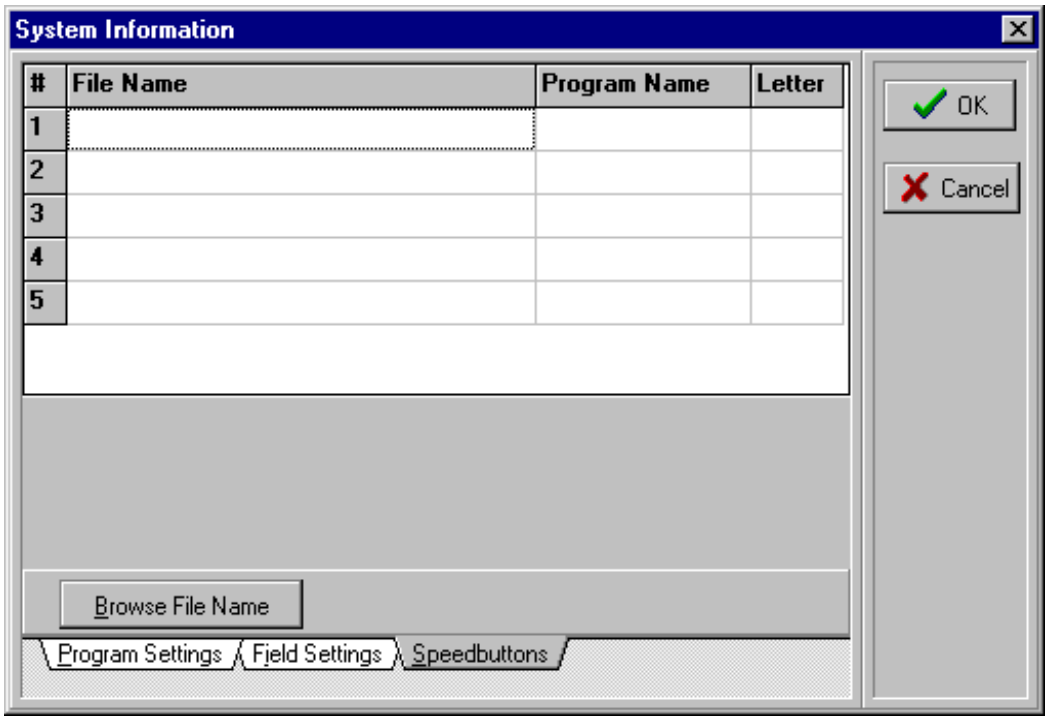


This is the Spare Field Names group. This can be used to create four True/False Fields, two Text Fields, two Numeric Fields and two Currency. These Fields if used, appear on the UnionCode Tab in a member's form.

Note: When using report writers these fields are know as SpareTF1-4, SpareText1-2, SpareNumeric1-2, SpareCurrency1-2.

NOTE: Throughout this documentation references will be made to option settings within System Information Form. The previous pages are what is referred to as the option settings.

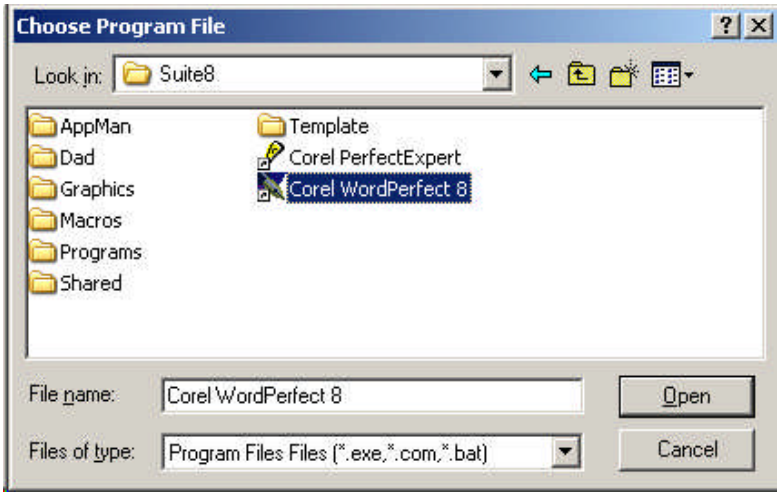
This is the Speedbuttons tab. This screen is used to define up to five custom Speed Buttons to be placed on the MUMS/2000 Tool Bar. These can be used to make it easier to run other Windows applications, such as accounting software or remote diagnostics.

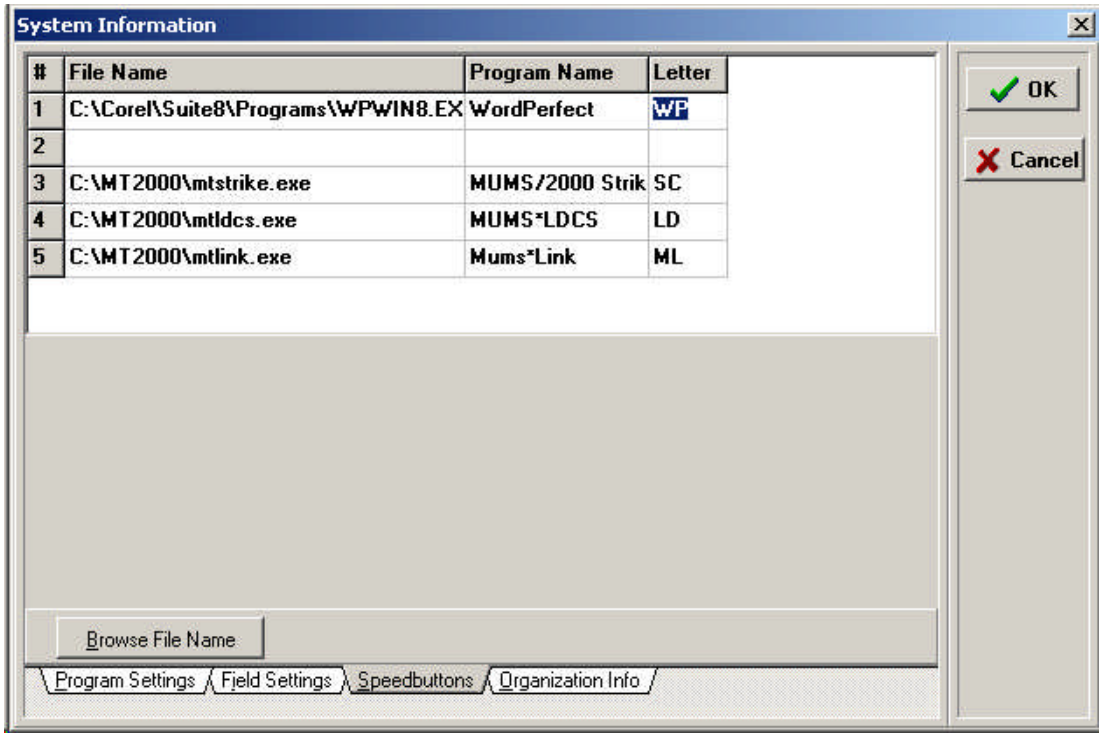


To create a Button, you enter the full path name under "File Name" or Browse to get the file name. You then enter the Program Name that Windows calls the program. This might be "Word Perfect" or "Word" for example. You should try to use the name that Windows shows when you do an **ALT-TAB** to go to other applications. If you correctly use the name that Windows calls the application and you press the same Speed Button a 2nd time, windows will trip to skip to the application already running instead of executing a 2nd copy of the same application. If you always exit the linked application prior to return to MUMS/2000 than it does not matter what you put in this field. This field is also used as the pop-up hint for the button.

The last step is to click on the "Letter" field and enter a two letter code to assign to the custom speed button.

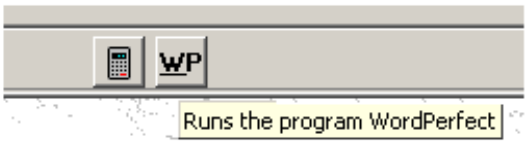
This is an example of using the Browse to locate Word Perfect for Windows to setup for a Speed Button.

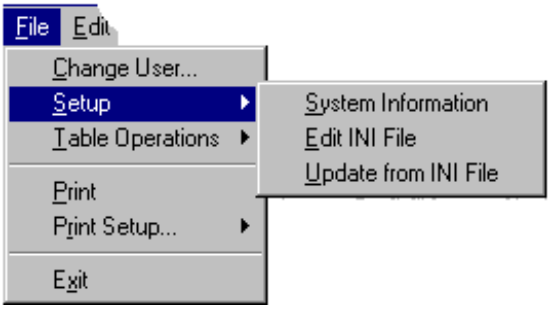




This is the result of the Browse and entry of "WordPerfect " and "WP" in the Program Name and Letters fields.

This shows the new button "WP" with the pop-hint. This hint is also displayed on the bottom status bar. You can now execute Word Perfect with the press of the "WP" button. You are allows to create up to five of your own buttons.





If for some reason you have a problem with MUMS/2000 and wish to change an option outside of the System Information Screen, you can edit the MT2000.INI file that stored the system options. The Update from INI File forces to program to use your new changes and will save them on exit of MUMS.

NOTE: This is normally never used.

If you see UMS 2000 menu item do edit, we will be splayed.

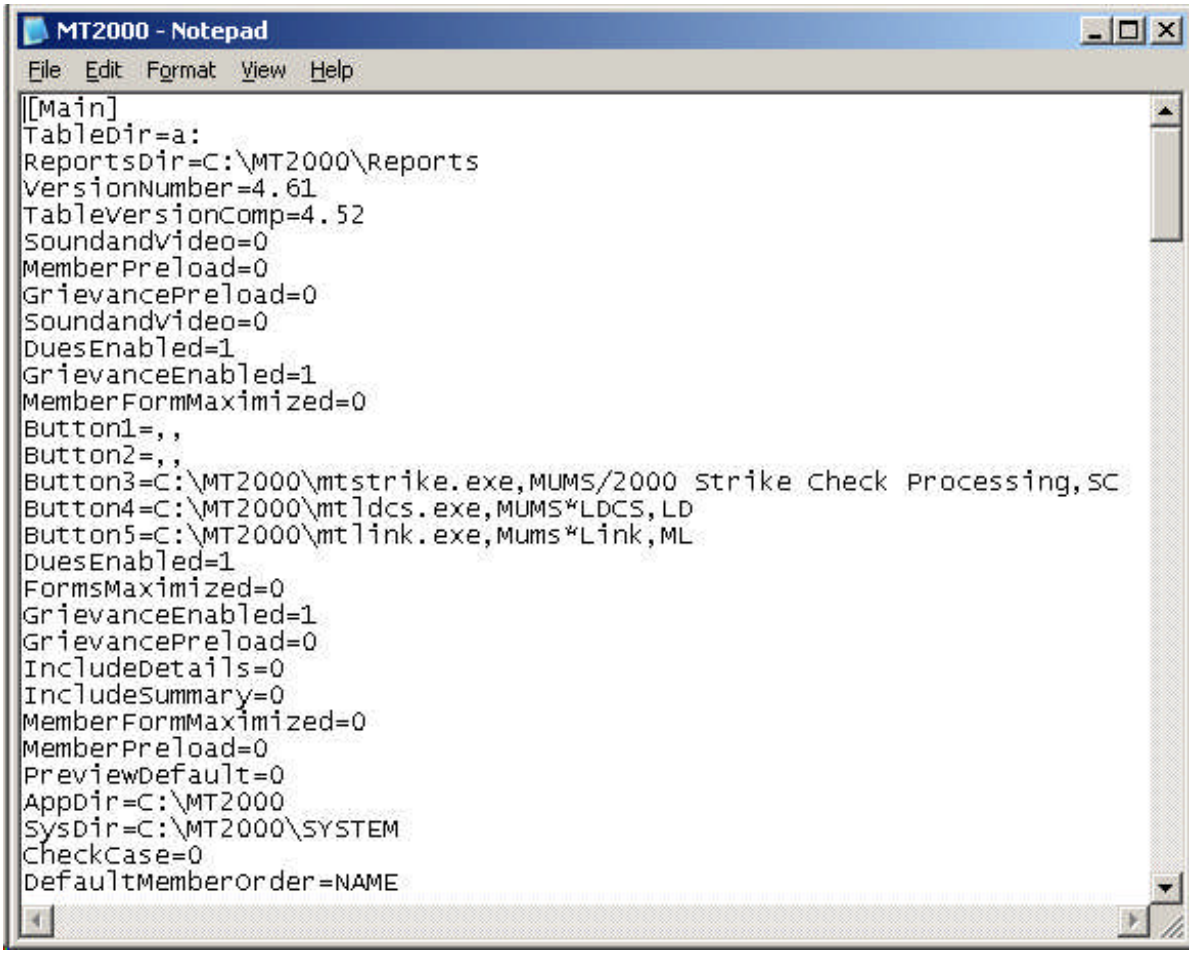


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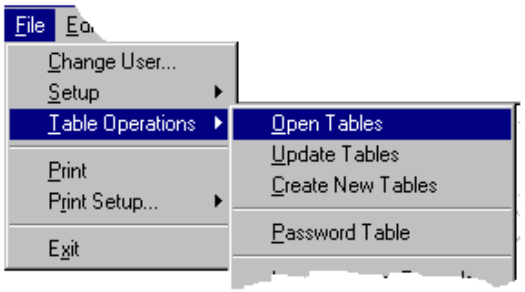
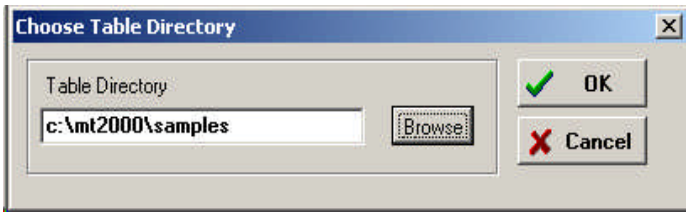
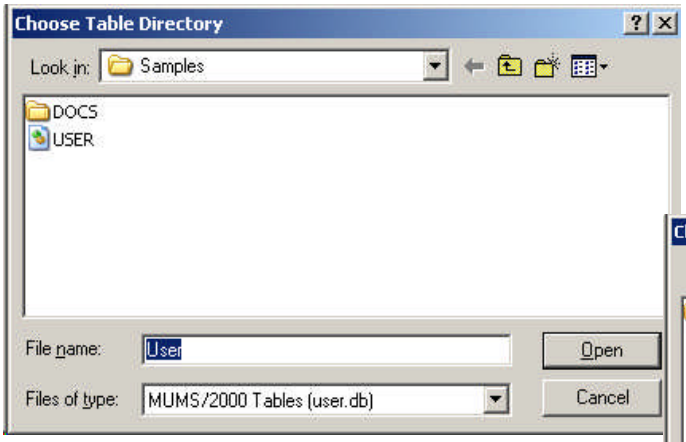
Table Operations
Open Tables

To change from Samples to your real data or other membership tables you need to run **File|Table Operations|Open Tables**.





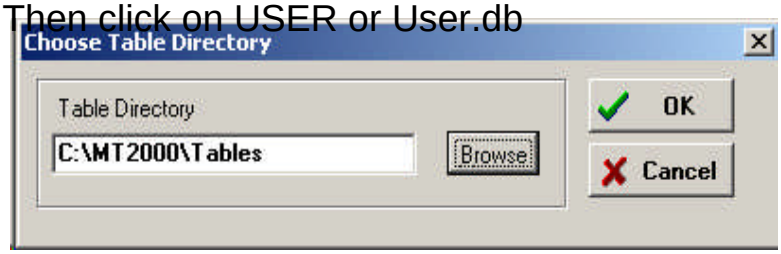
This window is used to change the membership table settings. You can change the Table Directory by hand or use the BROWSE button.



If you Browse, you need to click on "Up one Level" button to view all of your MT2000 folders then, for example, click on Tables

Folder.

Then click on USER or User.db



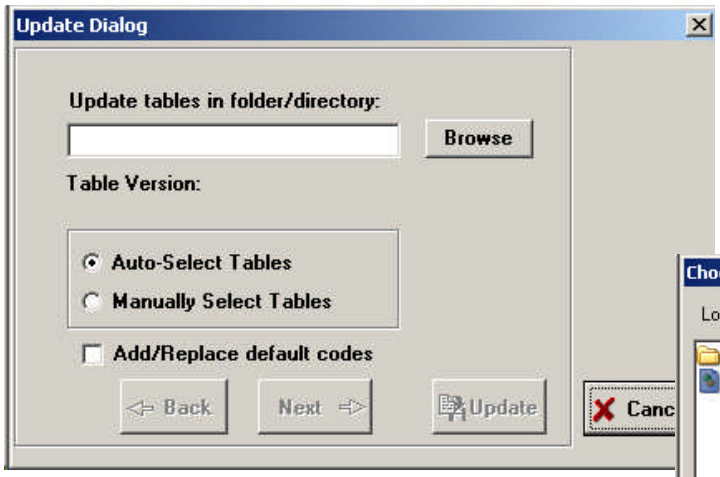
followed by the OPEN button.

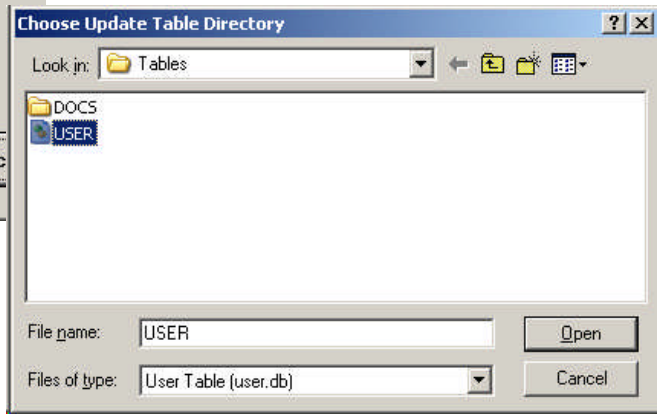
This will then insert the new folder as shown here.

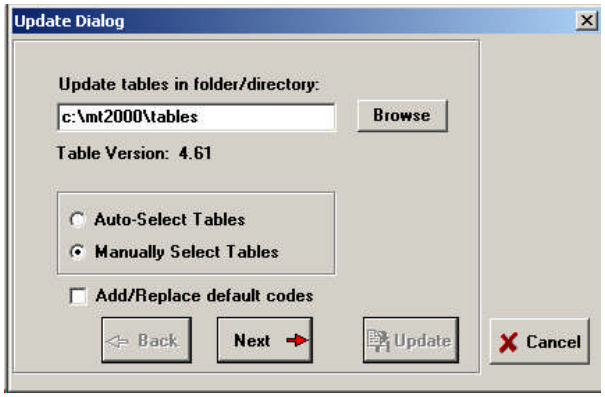
You will then be prompted to confirm the change waiting for you to confirm the new change.

Update Tables

MUMS/2000 **File|Table Operations|Update Tables** is used to convert files and rebuild files that the standard "Repair" will not fix. If you load a new version of MUMS/2000 and the tables need updating the program will automatically execute the update procedure. If you are directed to update specific tables this program will display this dialog box to select the database and method of update.

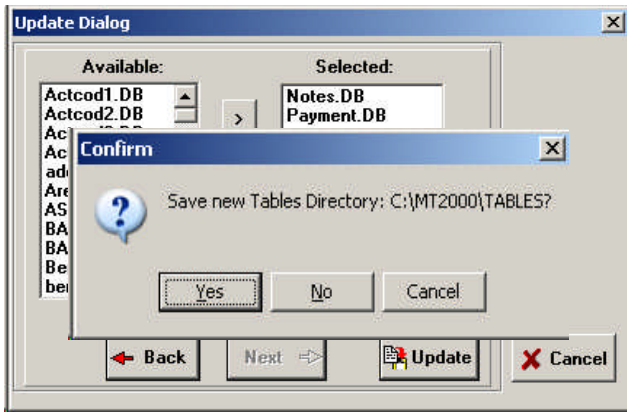




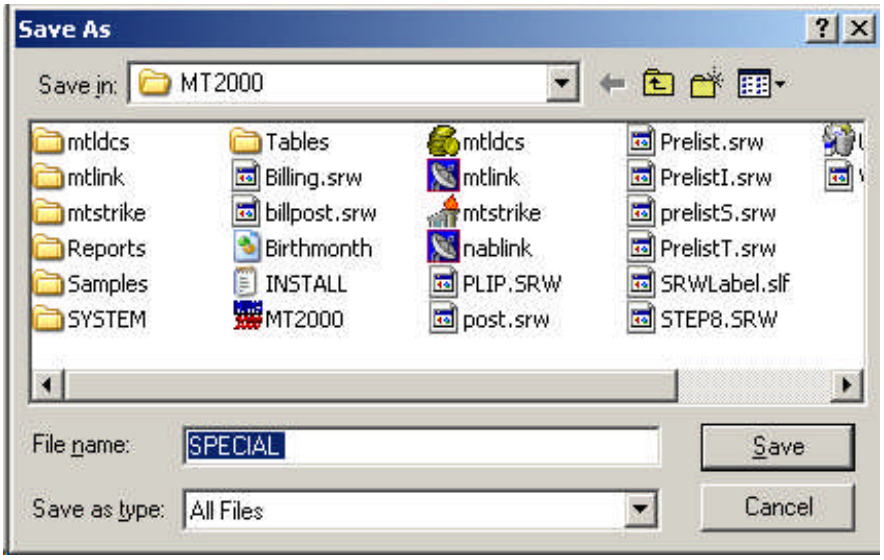


To start press the BROWSE button and click on USER or User.db then follow with the OPEN button.

You can then chose Auto Search or Manual. You can also indicate to add new default codes if provided.



In this example we selected the Manual method and picked the Notes and Payment databases that should only be repaired via this update procedure.



Create New Tables

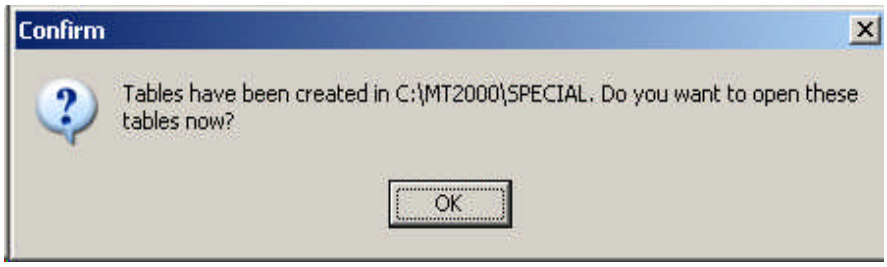
The following is shows when you request the MUMS/2000 menu item **File|Table Operations|Create New Tables**.

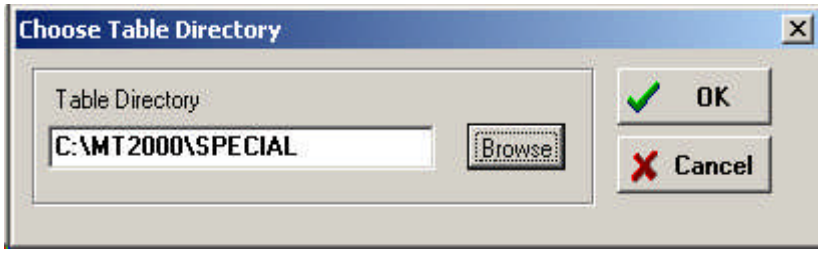
This dialog box is used to create a new set of tables within MUMS/2000. This can be used to hold a separate group of members or for an organizing campaign.

To create a new set of tables properly formatted along with default set of code tables, you need to replace the “TABLES” next to “File Name” with the name of the directory you wish to create. In the example above we used “SPECIAL” as the name followed by SAVE.

When you OK the new name you will get this confirmation message.

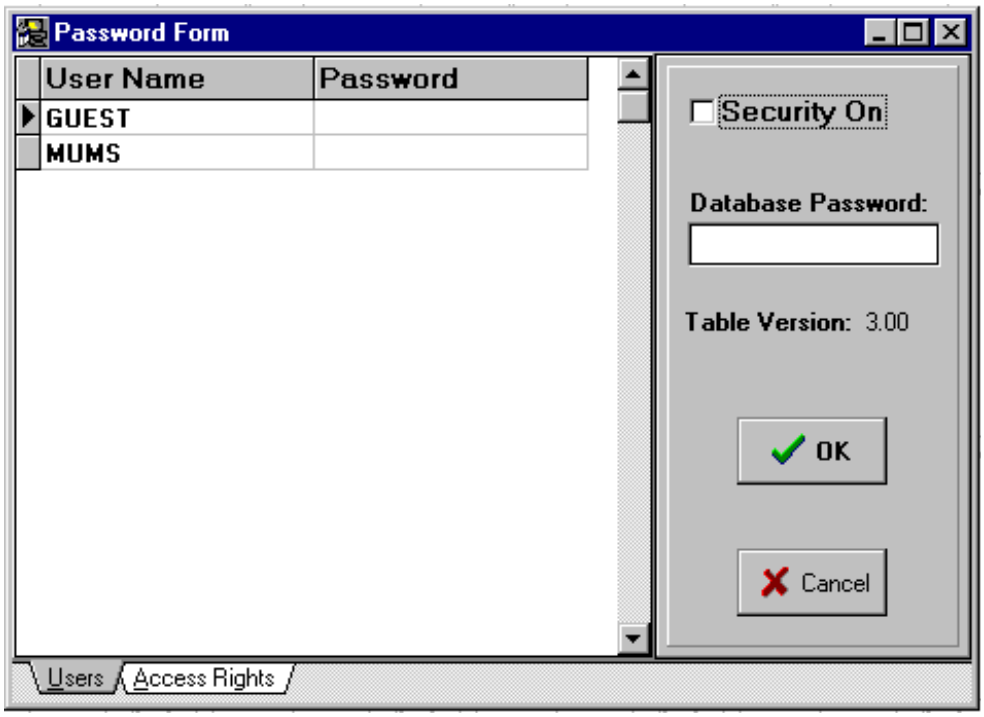
After the new tables are created this will be displayed. After you OK the Open question, the program will display the standard MUMS/2000 Open Tables dialog and you can OK to switch to the new tables or Cancel to stay where you were.





Password Table

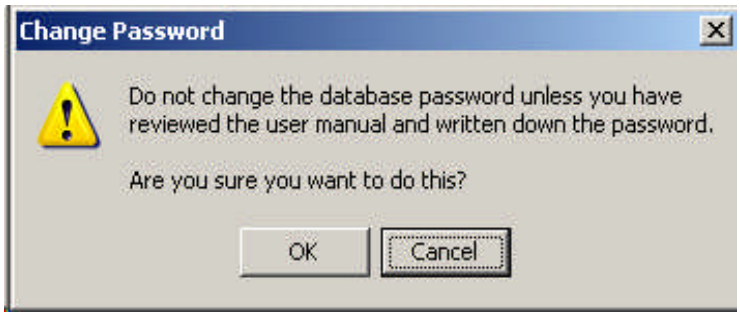
The Password Table that stores valid User Names, Passwords and access rights is executed from the **File|Table Operations|Password Table**.



This is the list of Users. This window is used to view the Users and their Passwords.

The "Security On" switch is used to activate the MUMS/2000 User/Password Login dialog.

The Database Password is normally never used. It can be implemented to prevent a expert computer user from accessing your Paradox database files from outside of MUMS/2000.



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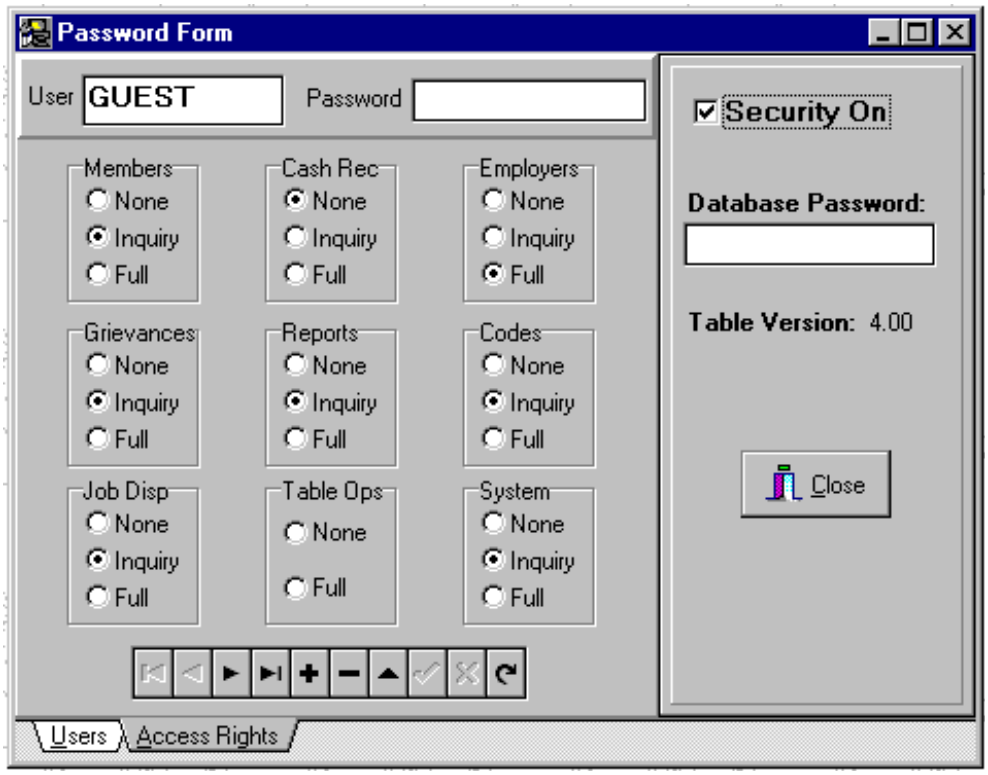
Please Note: **You must set on Security and setup User Names if you wish Deductions, Activities and Notes to have the User inserted.**

If you highlight a User and click on "Access Rights" the following will be displayed. You can restrict access only if “Security On” is set.



From this screen you can assign access rights to the single user in the following areas:

Member Information
Cash Receipt-Dues Processing
Employer Information
Grievance System
Reports
Codes Tables
Job Dispatch (separate module)
Table Ops (control Purge Feature)
System Control Tables

Each of these can be set to **None** (No Access), **Inquiry** only or **Full** update rights.

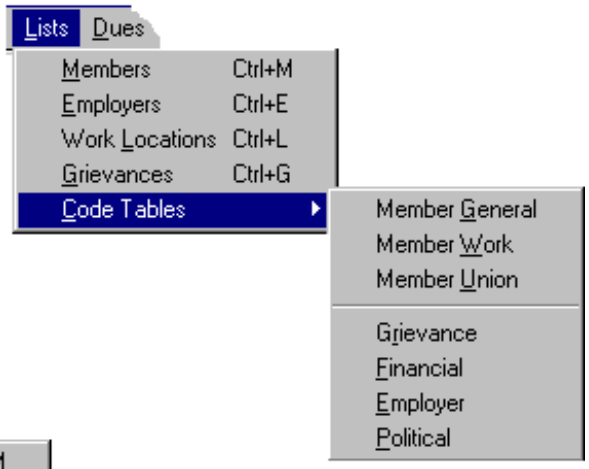
If, for example you created a user with no access to Cash Receipts-Dues , Grievances, Employers and Codes, the MUMS/2000 Tool Bar would be changed to the following. The Side Bar buttons for Dues and Grievances would also be eliminated.

Full Access

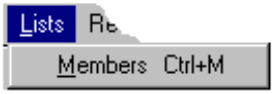
Restricted Access

The menu would also be reduced to the only show the Member Table Access.

Full Access...

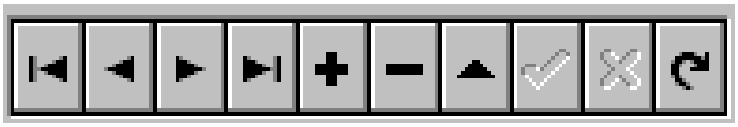


Restricted Access...

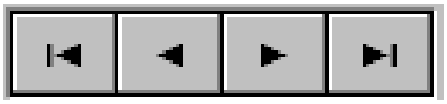


The normal Navigation bar that allows Add, Change and Delete would be reduced for an Inquiry only user to the following:

Full Access



Restricted Access



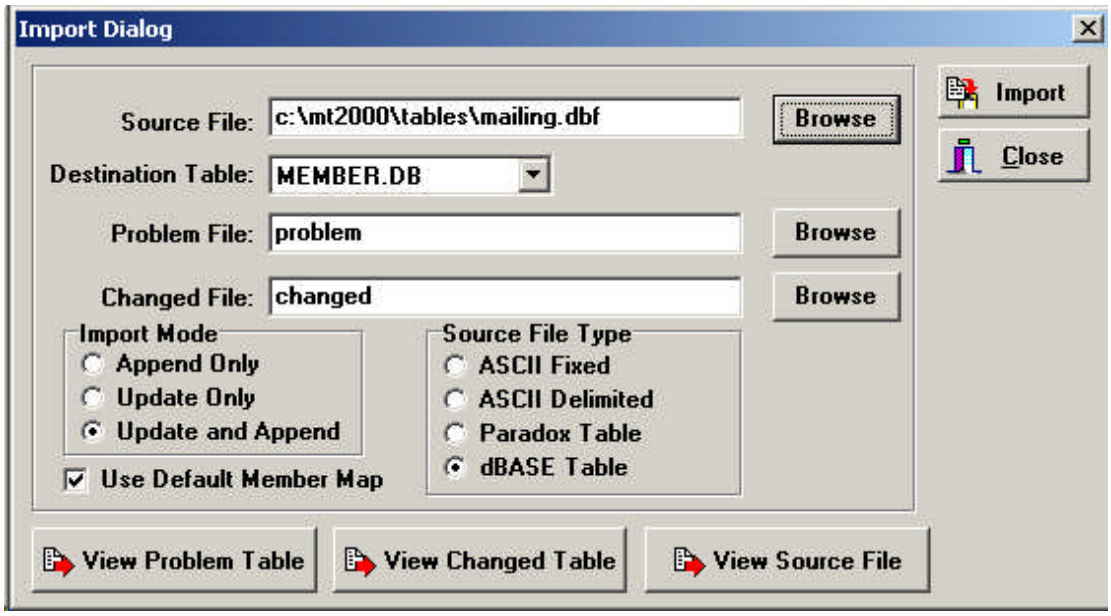
Import\Correct Records

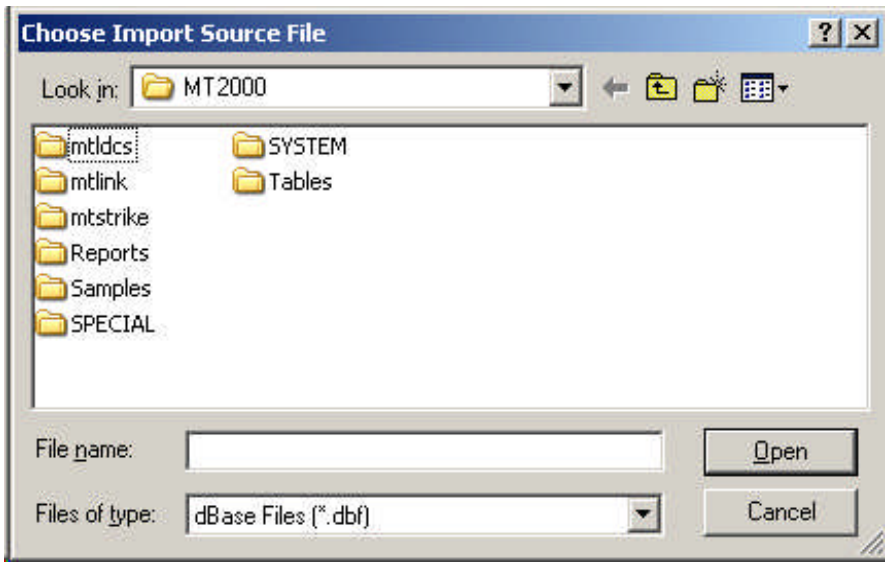
The MUMS/2000 menu item **File|Table Operations|Import\Correct Records** is used to import data from external sources. This is normally used to load data provided by the union headquarters or converted from an older membership system.

A custom ".SCH" scheme file and a ".MAP" map file must exist to inform MUMS/2000 where to place data. The source file of an import must be called ".TXT" and the name must match the SCH and MAP file and be in a directory other than where you are loading the MUMS/2000 data base.

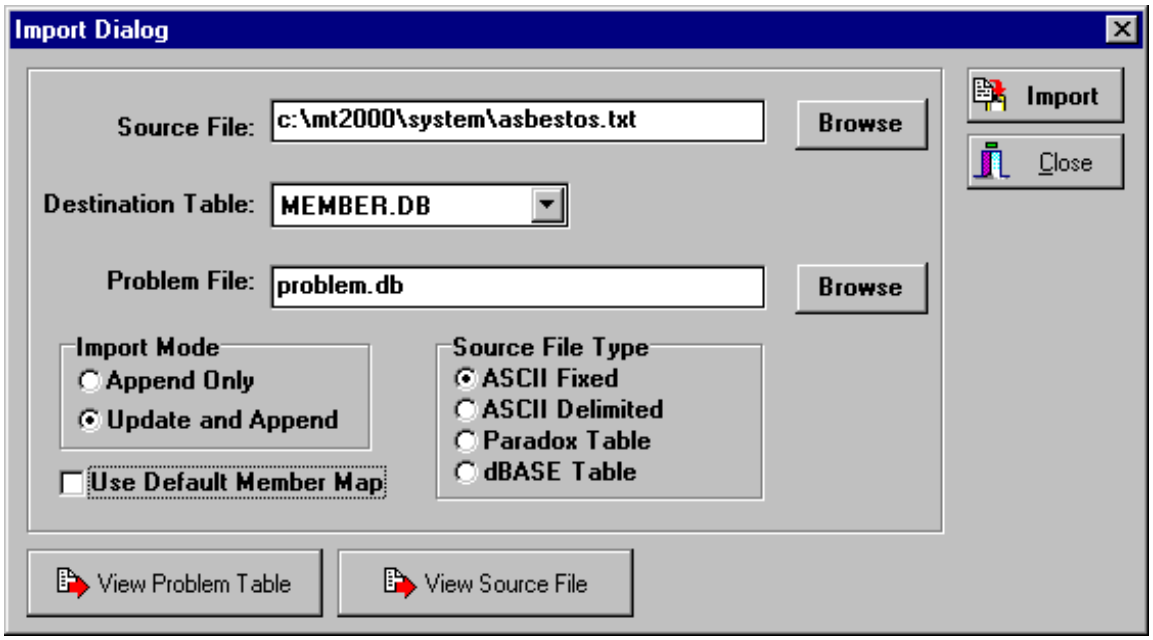
This is the Import Window with the Destination table set to MEMBER.DB.

This feature defaults to importing the mailing export file.

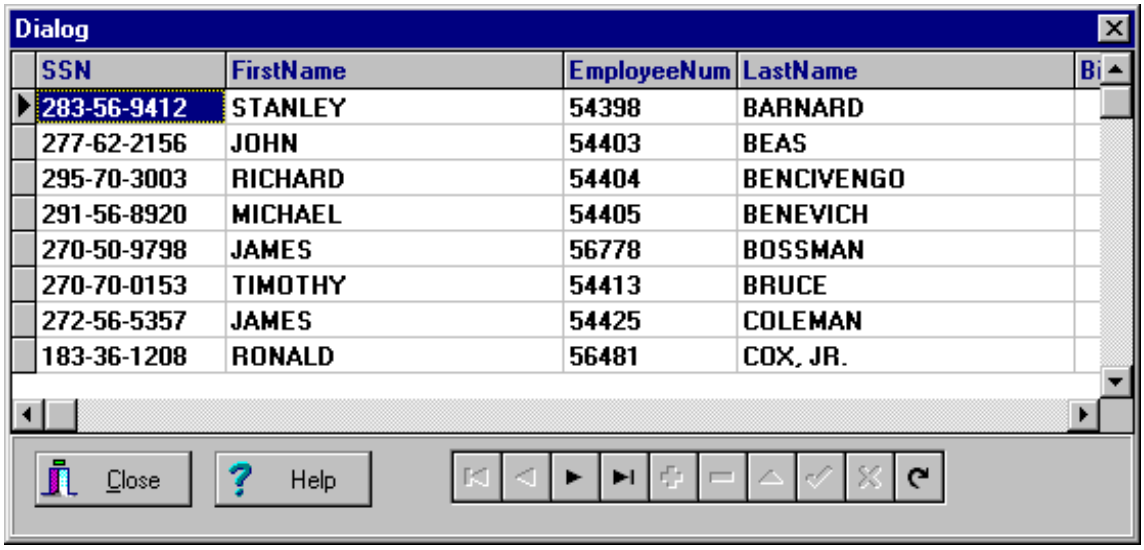




This shows the use of Browse for Source File. You need to locate the ".TXT" file to be used and click on it.



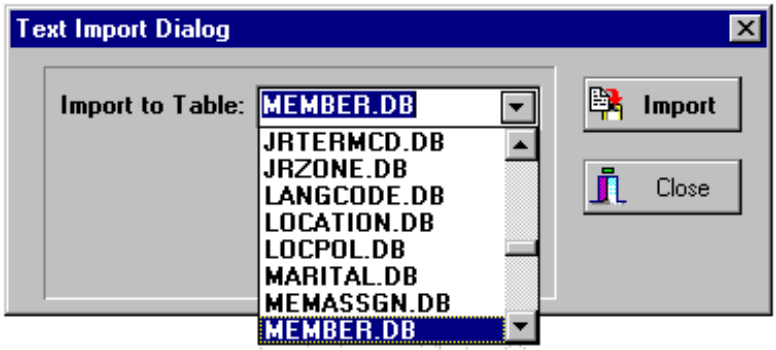
The above screen shows the Source and Destination filled in. Notice the Source was changed to ASCII Fixed and “Use Default Member Map” was un-checked to allow for special Map file. You are now ready to press the "Import" button to load your data.



You can use the View Source File button prior to the "Import" button to see of the fields defined match up correctly with the data provided. You can also view the Problem Table to see if any records are being skipped.

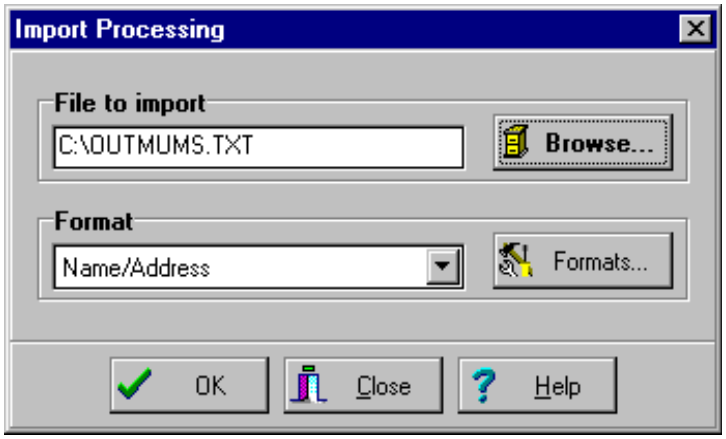
Import from Text File

This is the “Import from Text File” feature.



This will import data produced by the “Export to Text File” program described later.

The first step is to select the table to which you are going to import data into. You can use the BROWSE button if you need to.

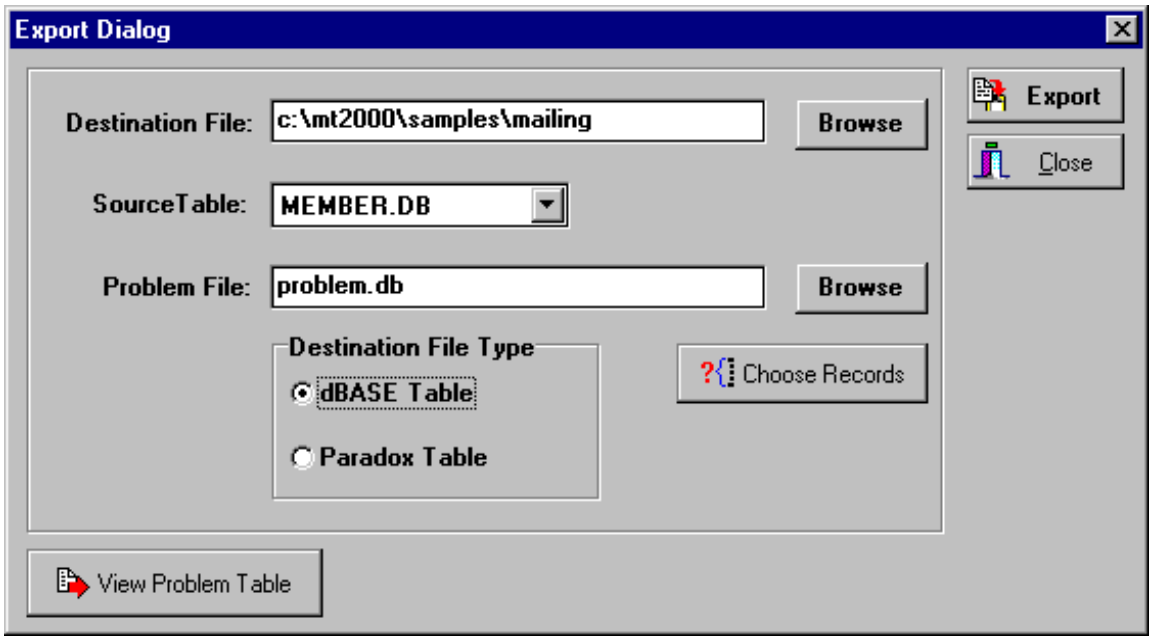


The next step is to assign the format to be used to read the data. If you have already defined one, you can select it with the pull-down. If you need to define a new format you can press the FORMATS button and this will load the Format 4 Step Wizard. This Wizard is described in detail under the “Export to Text File” feature.

Export to Mailing File

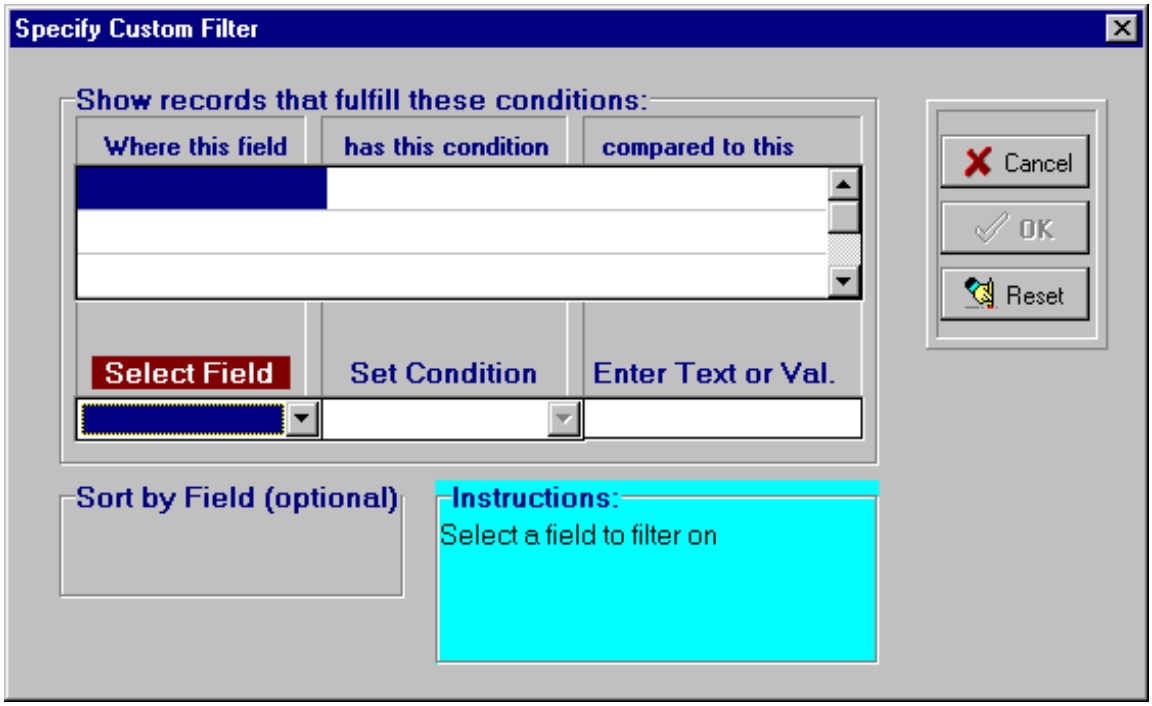
The purpose of this feature is to build a dBASE “DBF” file or a Paradox “DB” file that can be read by outside Postal Software.

The outside Postal Software uses this data to build internal fields for mailings and cleans up the data in the process. Most of these outside packages can also update this temporary exported file and you can then use the “Import/Correct Records” program to update MUMS/2000 records with the newly corrected information.



From this screen you select the Destination file. The program will default to a file called “mailing” in the current working directly. The MEMBER.DB source table will be automatically filled in. All you need to do is to select either the “dBASE” or “Paradox” format. The program will automatically insert the correct file extension to match you choice.

You can press the CHOOSE RECORDS button to use the standard MUMS/2000 filter. This can be used to select the records you wish to export for the mailing file. The mailing file will contain the SSN along with all of the name and address fields.



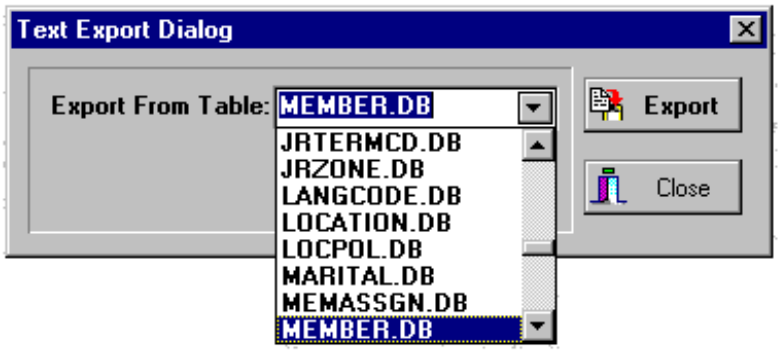
The program will display the number of records you have selected and allow you to confirm prior to export.

This will be display when the export is completed.

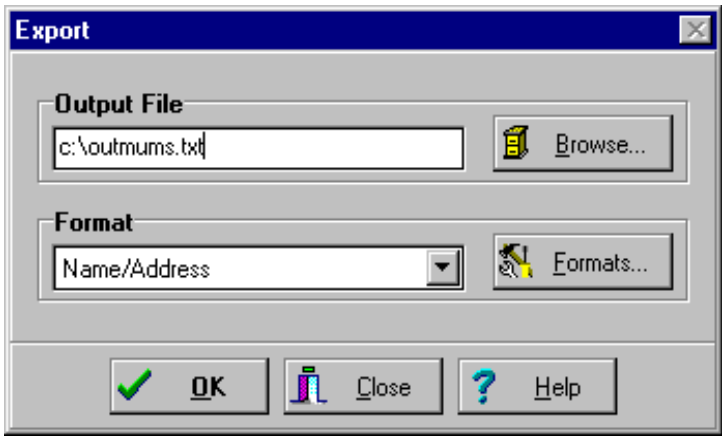
Export to Text File

This is the “Export to Text File” feature.

This can be used to extract data in almost any format to be read by other systems. The files produced by this feature can re-imported with the “Import from Text File” program if you wish.



The first step is to tell the program which data base you wish to export.
Once selected, you press the EXPORT button to start the process.



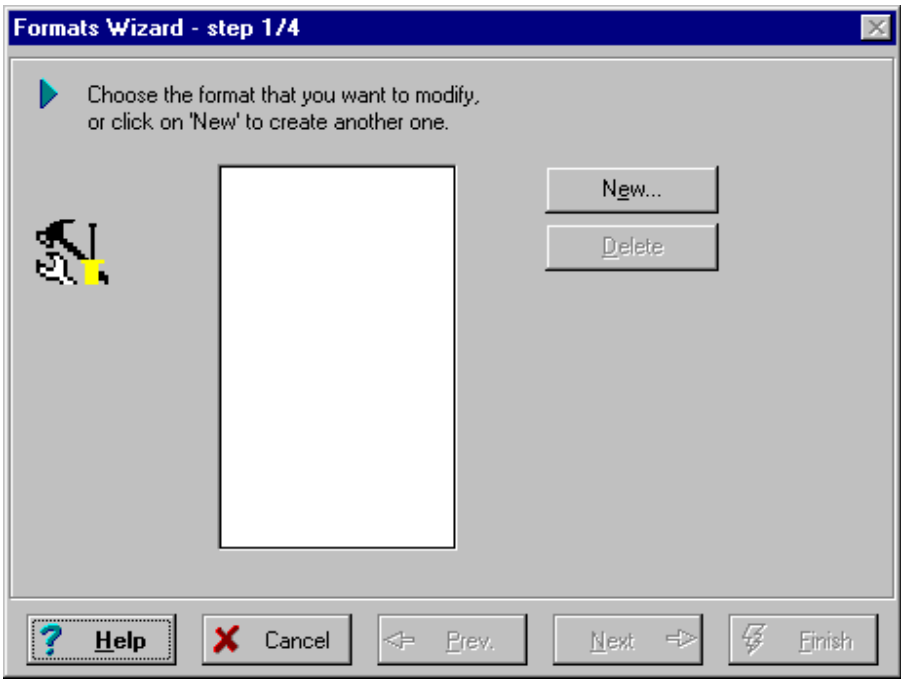
Next we assign an “Output File” and a “Format”. You should use “.txt”.

The “Format” is the definition of how the data will look and which fields you wish to output.

You can define any number of formats and use them later in this export and the import text program. You must define a format to continue.

This is the 1st of 4 steps in designing a Format for Text output.

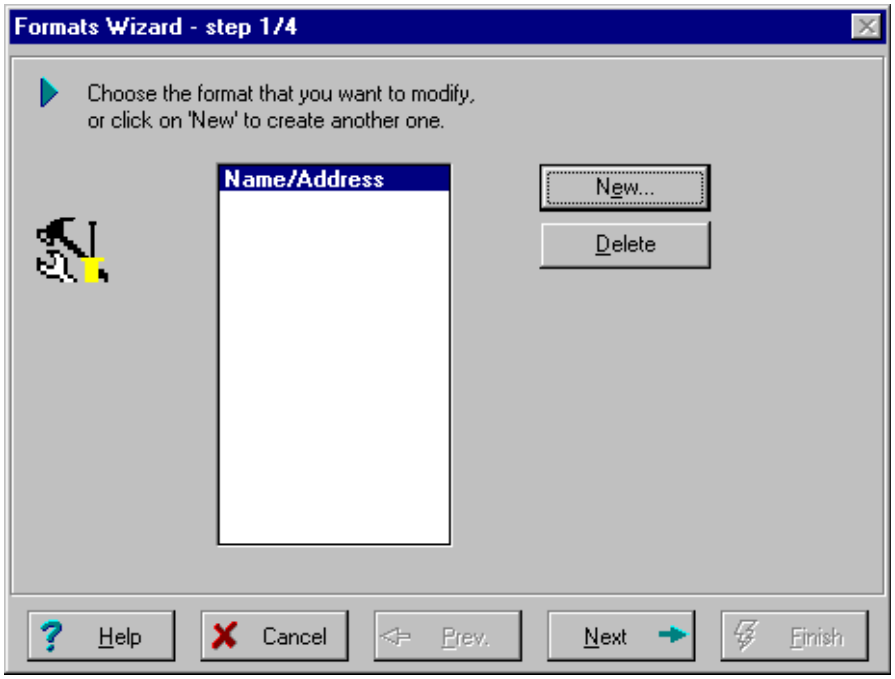
From this screen you can modify, delete or create a new format by using the NEW button.

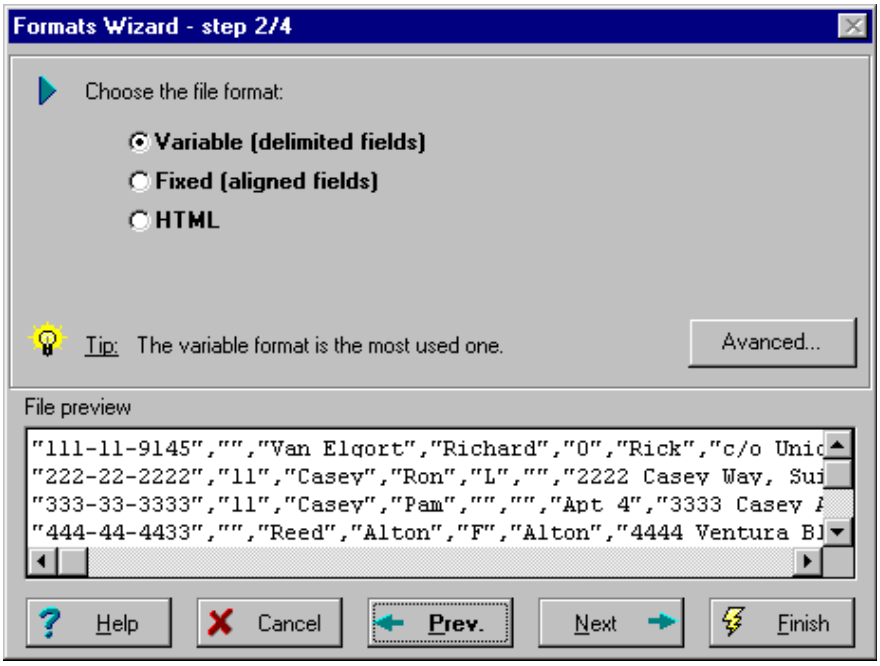


If you press the NEW button you will be prompted to input the name of the new format. This can be any name you wish.

Once you create the new name, it will appear in your format list.

Now you press NEXT to proceed with the Format Wizard.



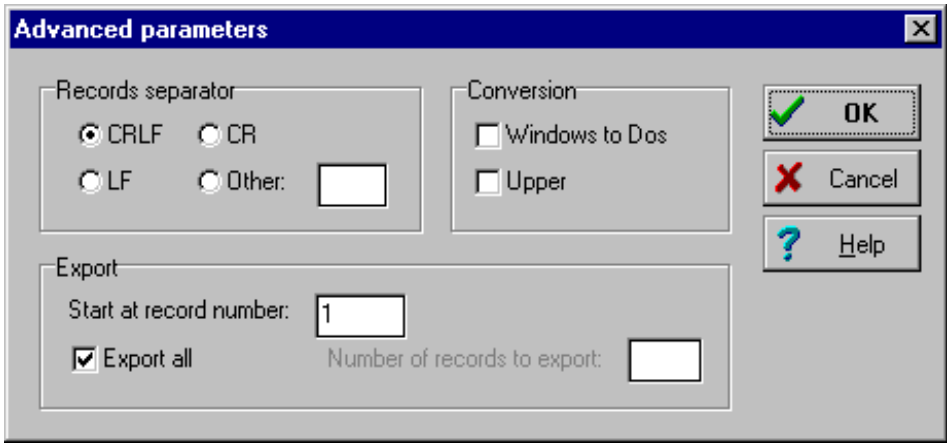


The 2nd of 4 steps is to choose the file format.

The most common are “Variable” and “Fixed”.

The questions asked in NEXT steps are difference for each format.

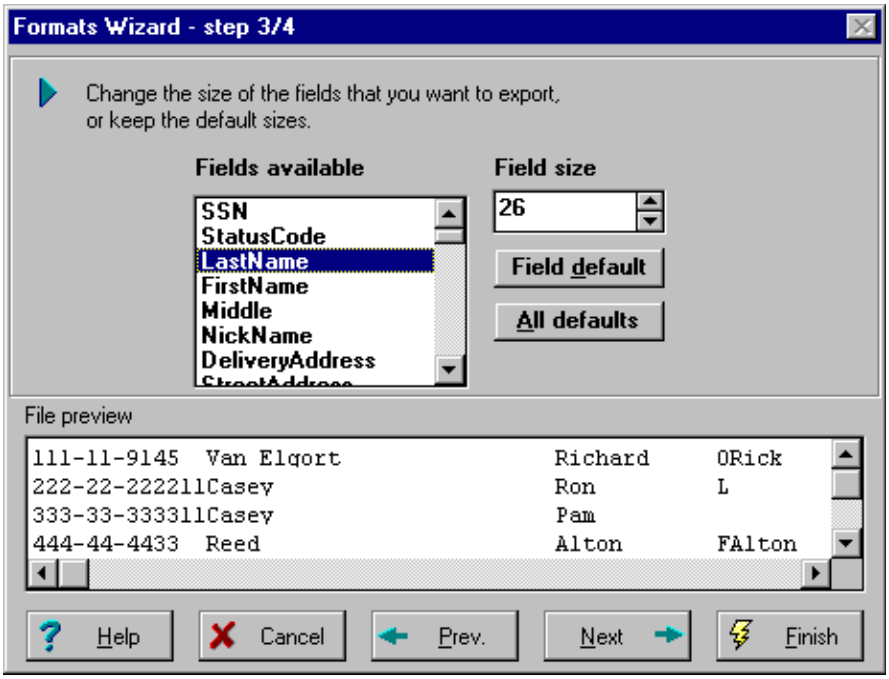
If you press the ADVANCED button you will get another series of options that can be selected.



This is step 3 of 4 based upon the “Variable Format”.

This screen is used to choose the separator character and the string delimiter.

You can preview the file in the lower box of this screen.

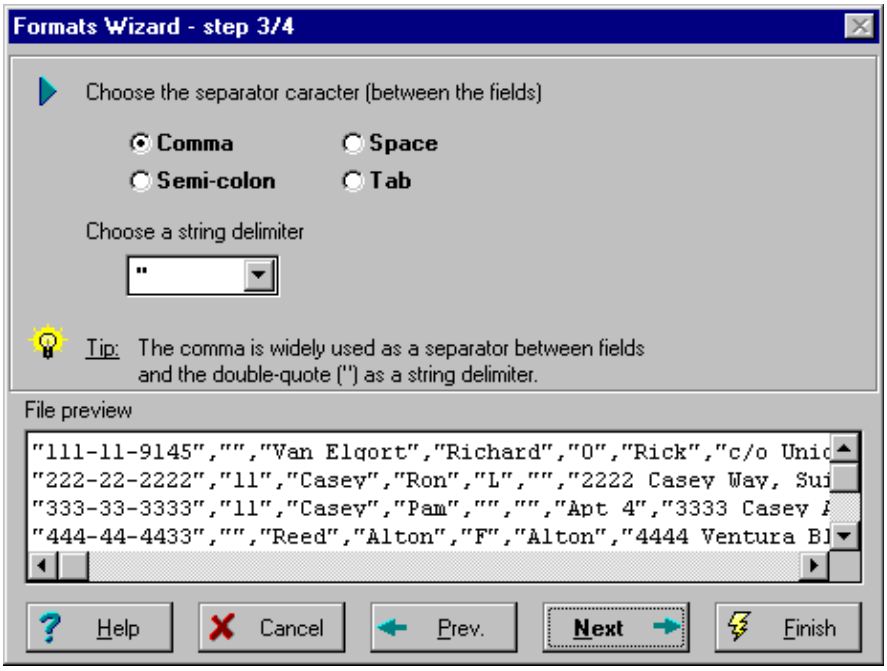


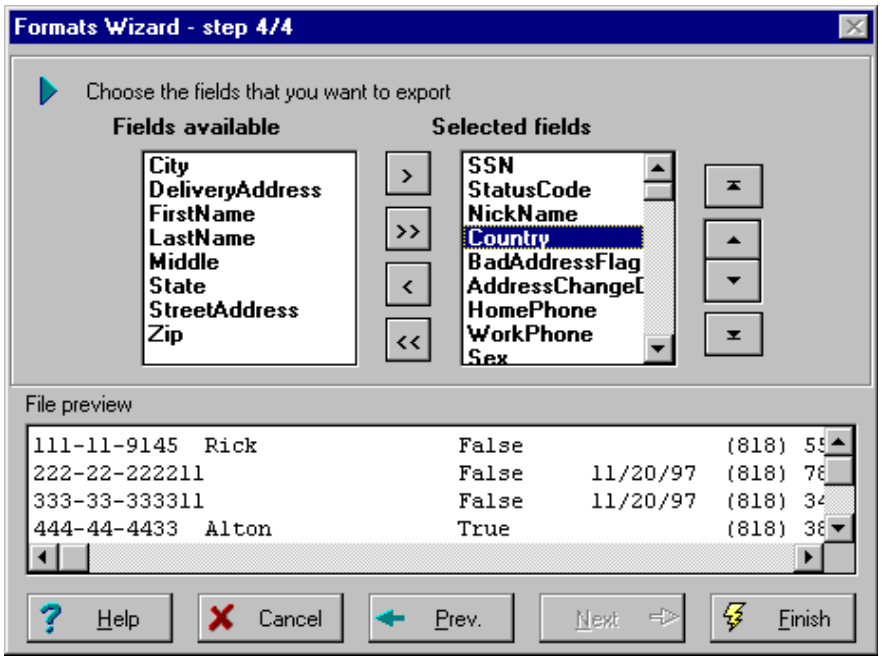
At any time you can use the PREV button to go back and change you entries.

This is Step 3 of 4 based upon the “Fixed” format.

This screen is used to change the fixed size of any field.

Notice the difference in the file preview windows.

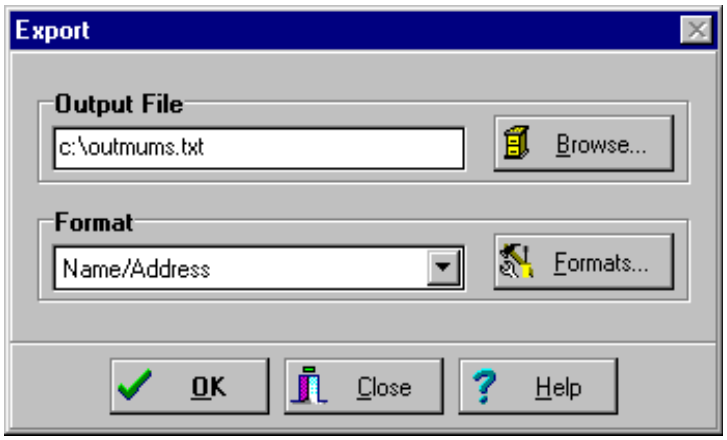




This is step 4 of 4 for any of the formats. This allows you to select some or all fields from the file to be exported. You use the buttons to add and drop fields.

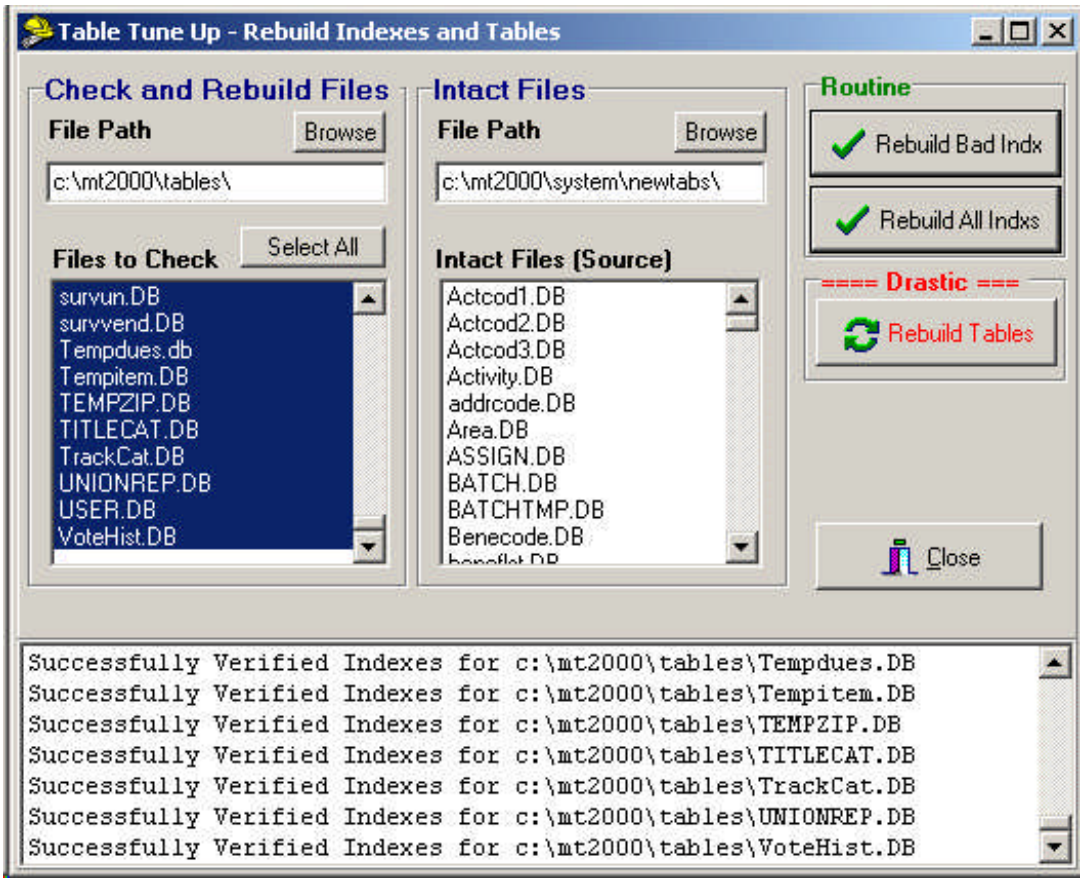
When done you press FINISH to complete the definition of the new format. This definition will be saved under the name you gave for future use.

Once the Format is defined you will be ready to OK the export.



Repair Tables

Repair Tables is activated from the **File|Table Operations|Repair Tables** menu. This is only to be used if the computer warns you that you have corrupt data or indexes.



You can leave the above screen set to repair all tables or select the one you want. The bottom portion of the screen is a log of activities. You can save the log to be printed later if you are having a major problem and wish to document the repair.

During repair you will see various progress charts for each table. The program will also add to the log to denote if the table needs to be repaired or not and the progress of the repair.

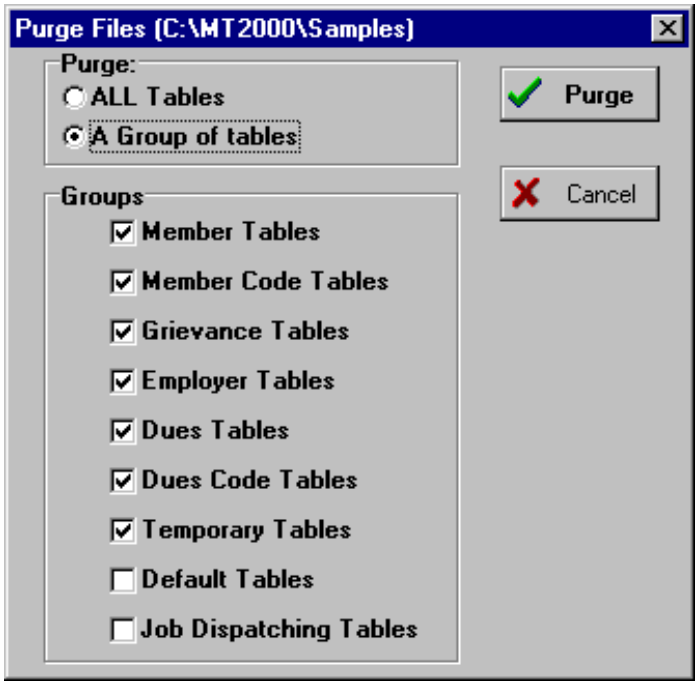
MUMS/2000 Ver 4 adds various steps of repair that should be taken in sequence. Normally you would ask to “Rebuild Bad Index” then “Rebuild All Index” and if indicated you can “Rebuild Tables”. All of these three options apply to those tables highlighted in the left window.

Please be sure to review all items inside the log window from top to bottom to see if the program recommends “Rebuild” any of the tables.

This feature can also be run from the Union Friendly Systems program group under “Table Tune-up”. If you are running it from Windows menu and not within MUMS you will need to browse for the “Verify & Rebuild Files”. You will also need to point to the “MT2000\systesm\newtabs” for the “Intact Files”.

Purge Tables

The **File|Table Operations|Purge Tables** allows you to clear the MUMS/2000 tables and files.



This is the Purge File window. This allows you to Purge all Tables or select those that you wish to purge.

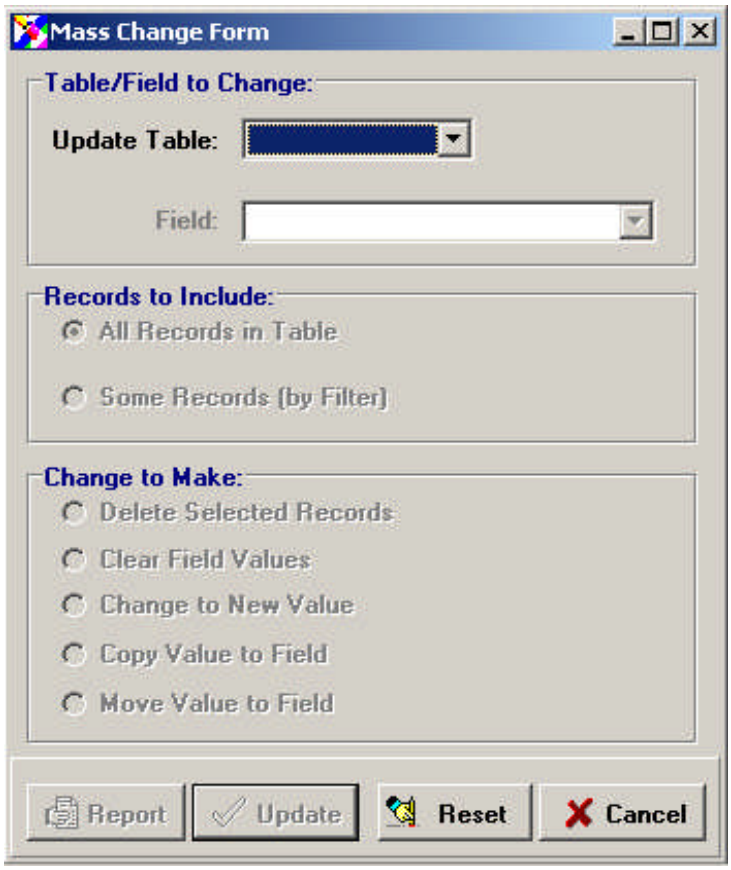
WARNING: Purging Tables will erase your data!

This option is useful if you wish to clear out your information and start over.

MUMS/2000 Ver 4 added the new option of “Default Tables” to allow you to purge all tables except those code tables that you started with.

Mass Changes

The **File|Table Operations|Mass Changes** allows you to update a group of records with a single operation.



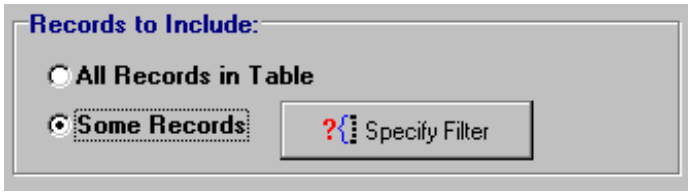
From this screen you can select the table you wish to perform the mass change.

The you can select the field you wish to update.

You can select all records or use the standard MUMS/2000 filter to select a group of records.

You can then Delete the Selected Records, clear the field you indicated above or change the field to a new value.

The REPORT button can be used to view the selected records. When you are ready you must press the UPDATE button to have the changes take place.

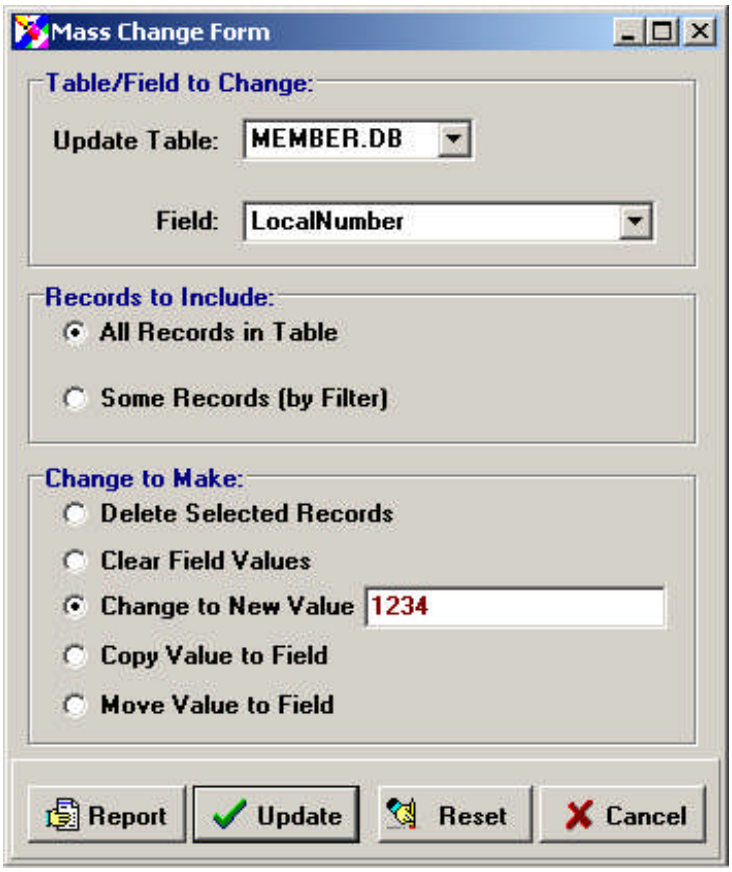


If you click on “Some Records” the FILTER button will appear. You can read more on FILTER in Chapter 8.

If you click on “Change to New Value” a box will open for you to enter you new information.

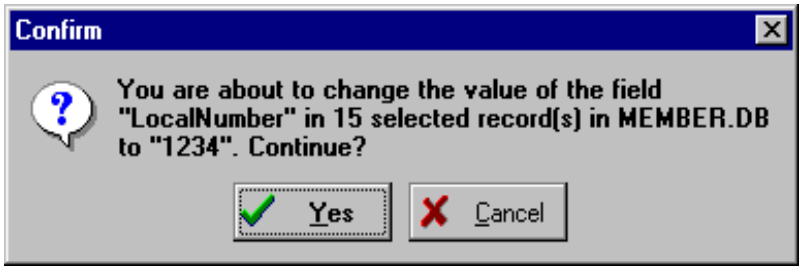
In this example we are going to mass change the “LocalNumber” field within the “MEMBER.DB” database.

We are going to change all records to a value of “1234"



If you are changing a date, be sure to use the format with slashes. You can use mm/dd/yy or mm/dd/yyyy to enter year 2000 items. If the field you are changing is represented by a check box, such as “Bad Address” or “Citizen” then the proper entry is “True” or “False”.

If you have completed all the information for a valid Mass Change, the UPDATE button will be active.



When you press the UPDATE button you will be prompted to confirm the Mass Change. The program will remind you of the field and data base and the new value. It will also tell you how many records it will be changing.

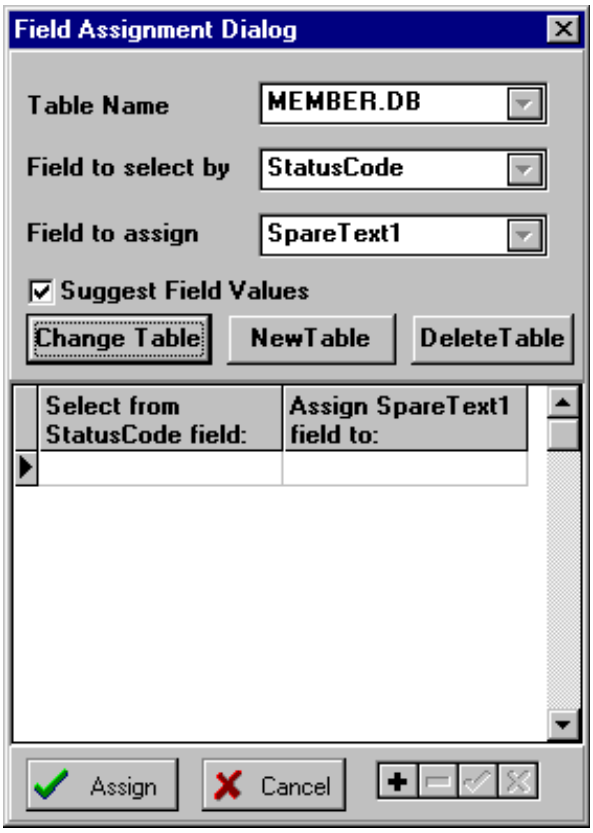
Field Assignments

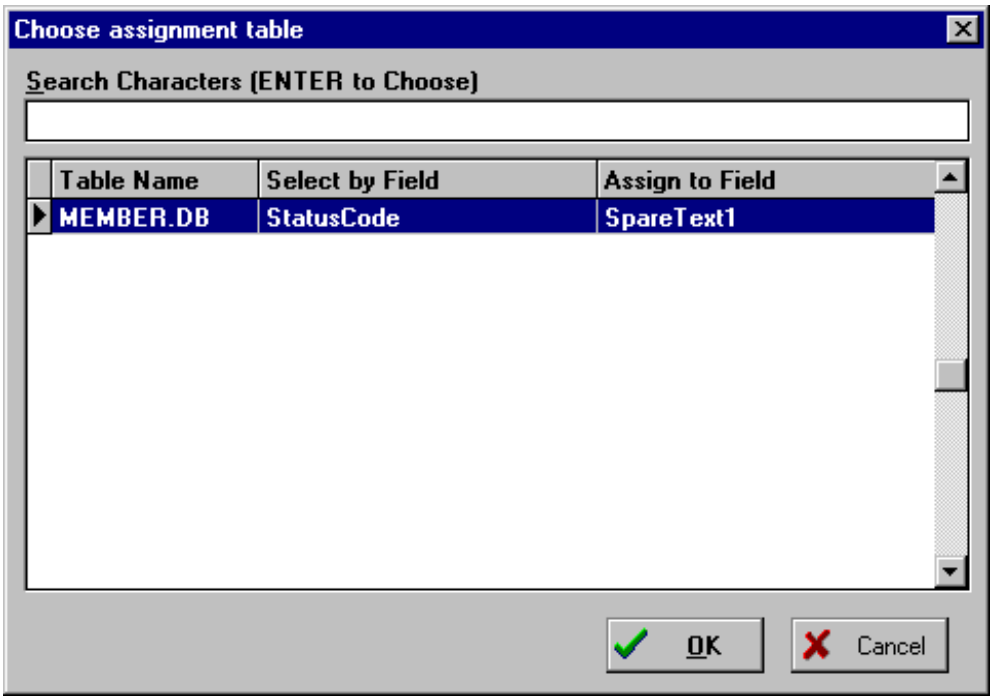
This is the new Field Assignment Dialog.

This can be used to update fields within a table based upon values found in other fields.

Therefore you can setup a list of comparisons and assignments. This list is saved as a Assignment Table. You can do a “New Table” and select a Table Name, Field to Select and Field to Assign.

The “Suggest Field Values” option is used to request the program to review all values actually used and build a table of those values to select from.





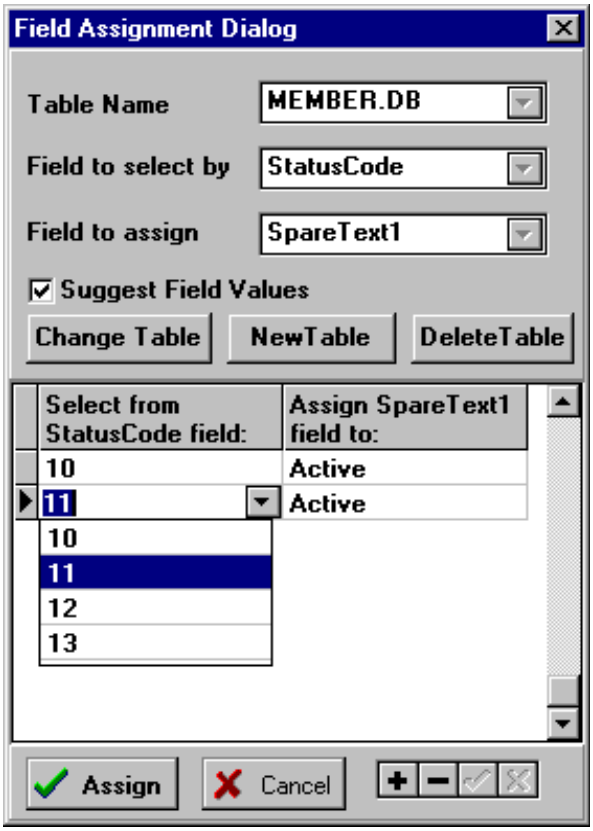
You can also press the “Change Table” button to view previously stored assignment tables.

This example shows setting the new SpareText1 field to “Active” based upon searching “StatusCode” of 10 and 11.

Notice the pull-down for “Select from...” column.

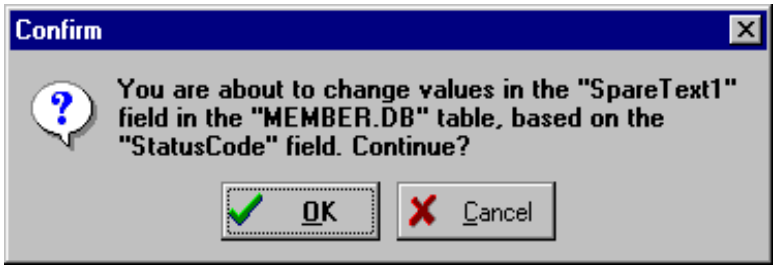
These values are computed from actual use rather than all values possible. This makes your assignments more accurate.

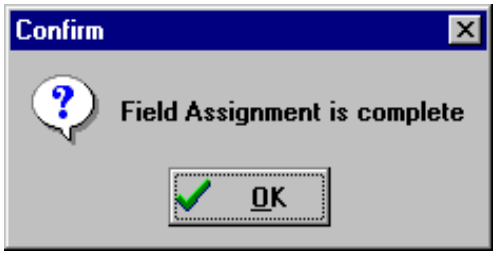
WARNING: Requesting “Suggest Field Values” may take some time based upon the size of your fiels.



Once you are ready to do the Assigning you press the ASSIGN button.

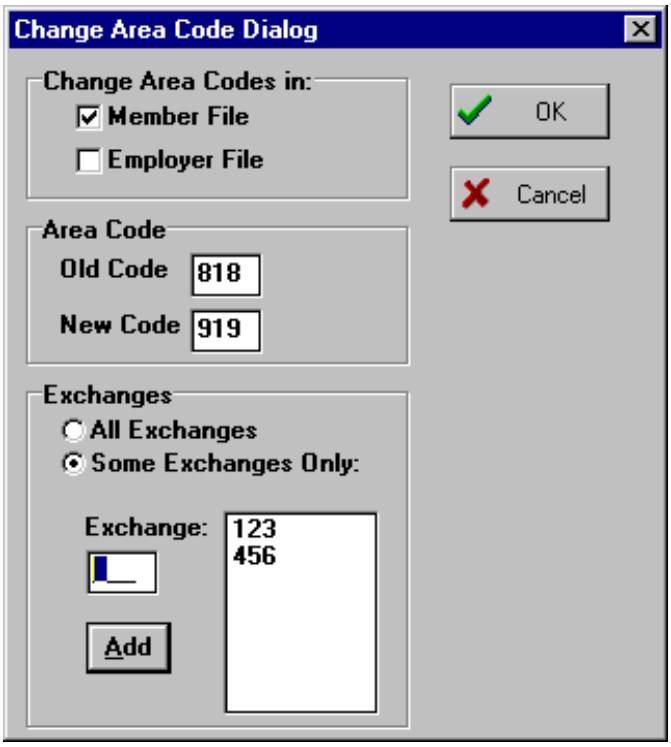
The program will request confirmation.





This message is displayed when done.

Change Area Codes

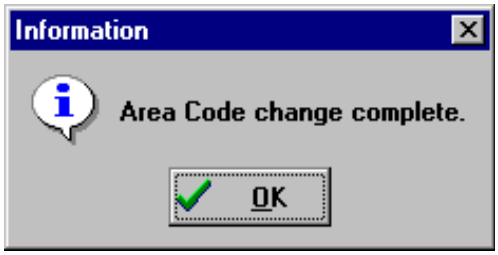


This is the new Change Area Code feature in MUMS/2000 Ver 4.

This feature allows you to change either the Member or Employer file phone numbers. You enter the Old and New Area Codes in the middle section of the above screen.

If not all Exchanges or Prefixes are being changed, then click on “Some Exchanges Only” and enter the three digit Exchange in the box and press ADD to add it to the list.

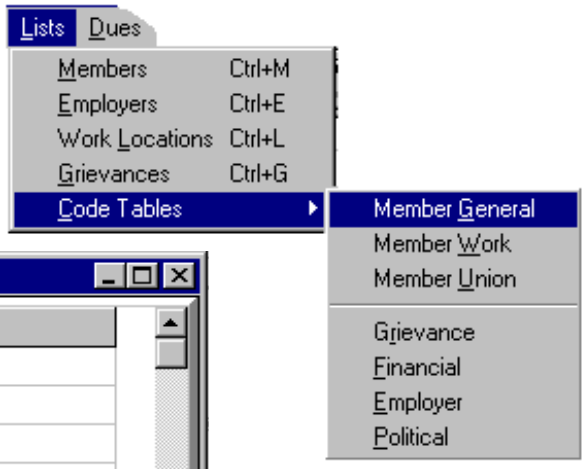
When you press OK, you will be presented with a confirmation message.

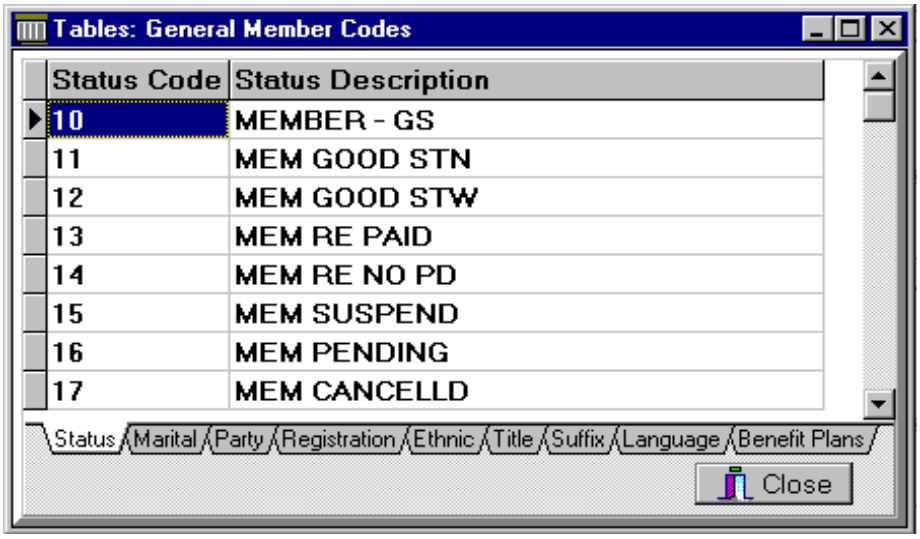


This is shown when done.

Member General Codes

The following is shown when you run **Lists|Code Tables|Member General**:



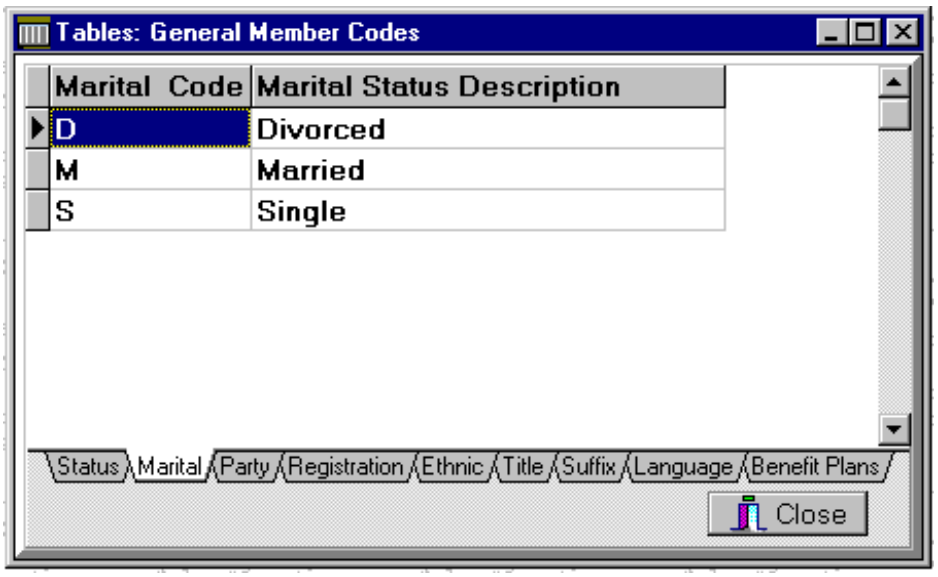


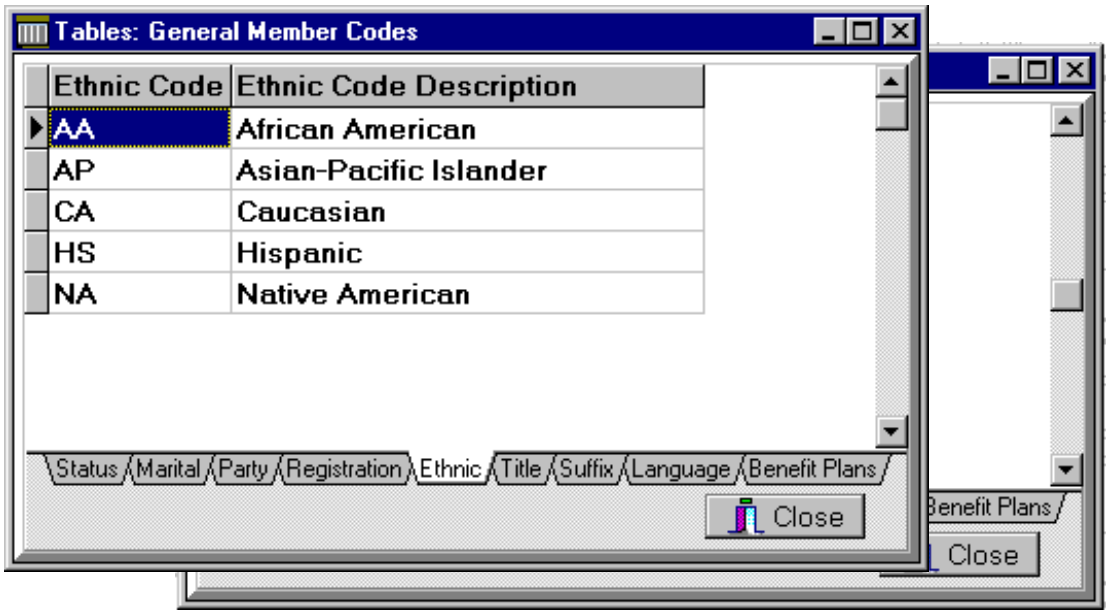
This is the **Status** table within the General Member Codes. You can use any set of codes such as A=Active, R=Retired.

You can use **INS** key to insert new items. You use **ESC** to cancel an add and **CTRL-DEL** to delete existing highlighted table entries.

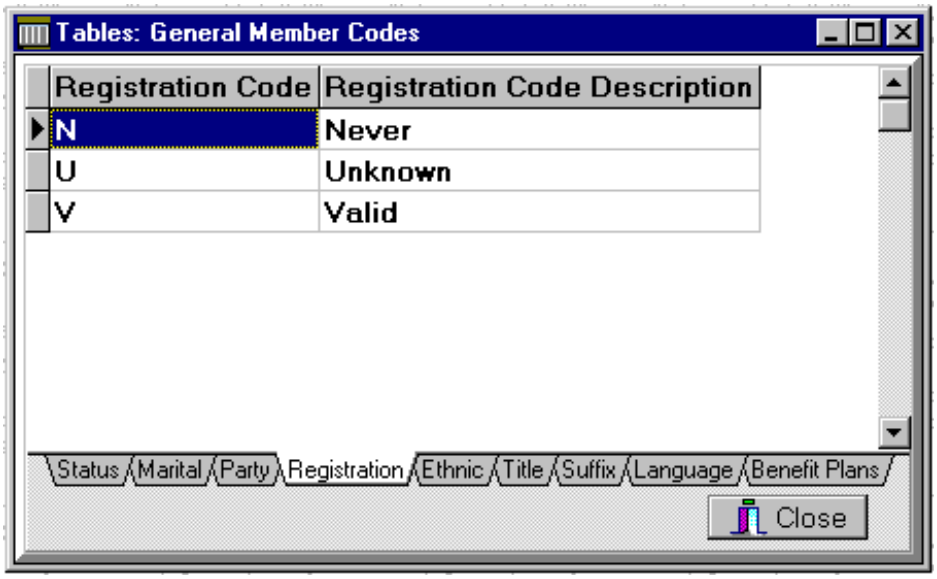
Notes:
- ? Do not delete codes that you are have already used!
- ? Tables shown here are only examples of what you can do.
- ? Click to select individual tables from the Tabs at the bottom.

This is the **Marital** code table.





This is the Political **Party** table that is used for member information and representative information.

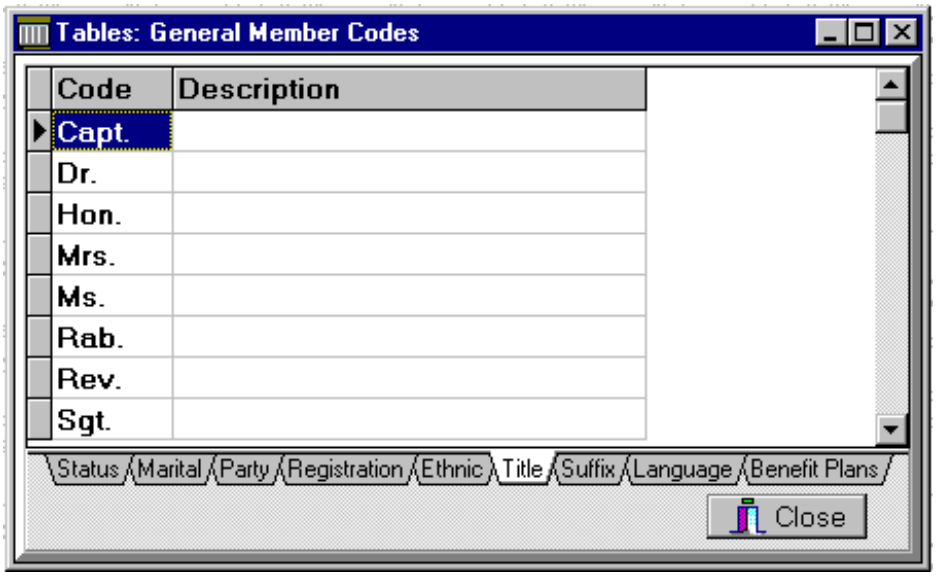


This is the **Registration** table.

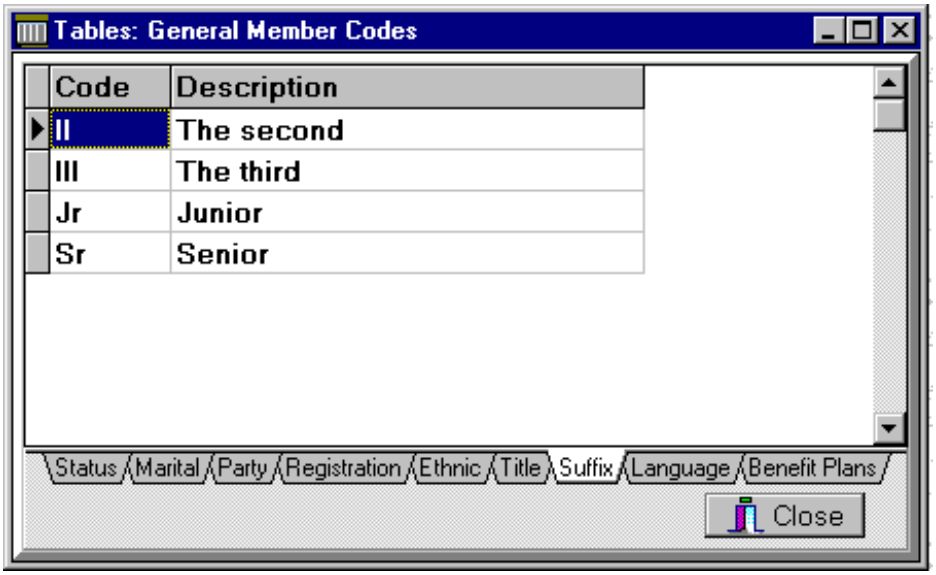
This is the **Ethnic** Table.

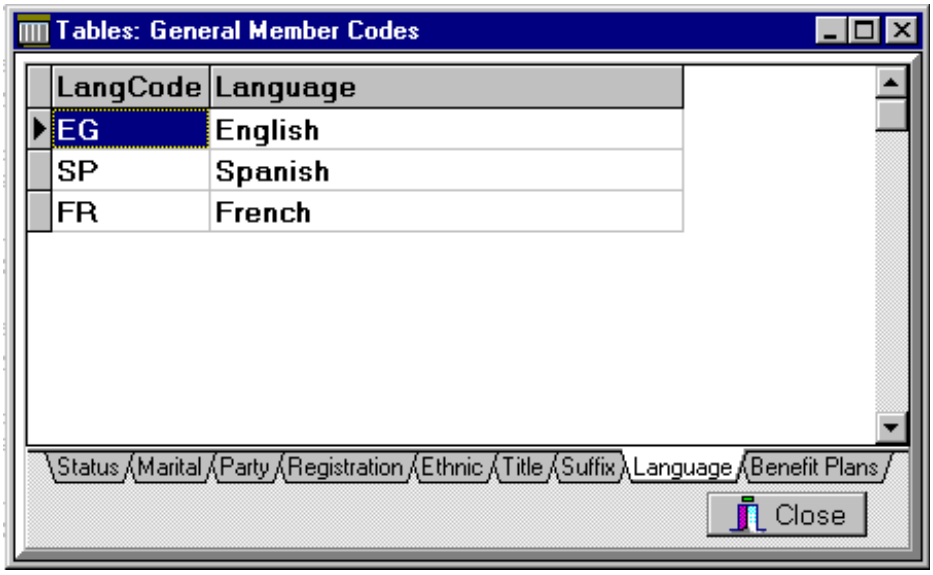
This table can be disabled with the switch in System Information.

This is the **Title** Table.

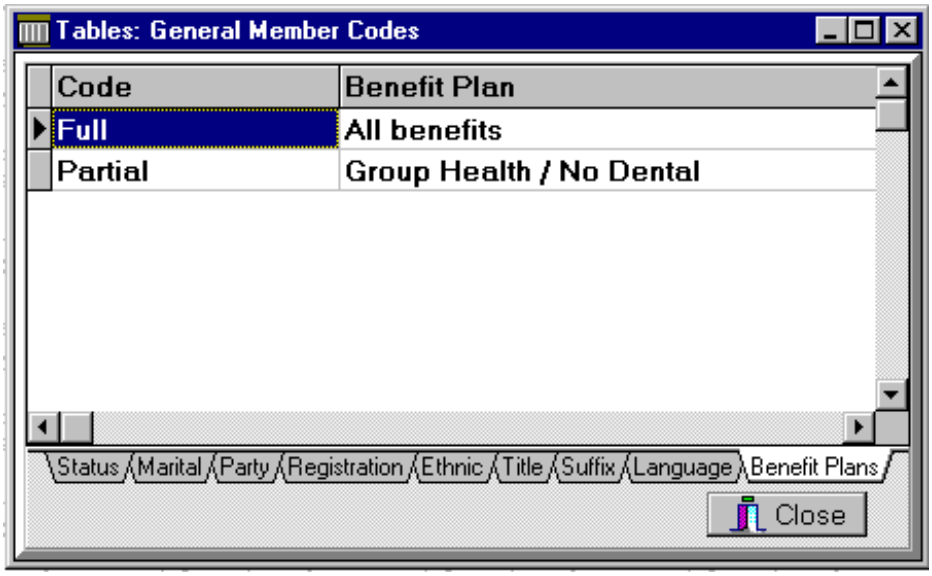


This is the **Suffix** Table.





This is the **Language** Code Table. This table can be disabled with the switch in System Information.



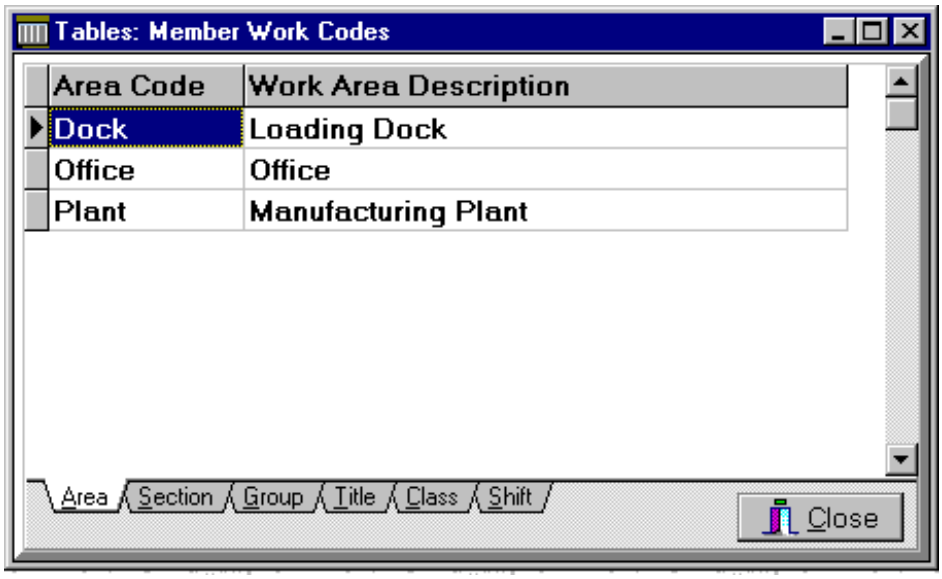
This is the **Benefit Plans** code table.

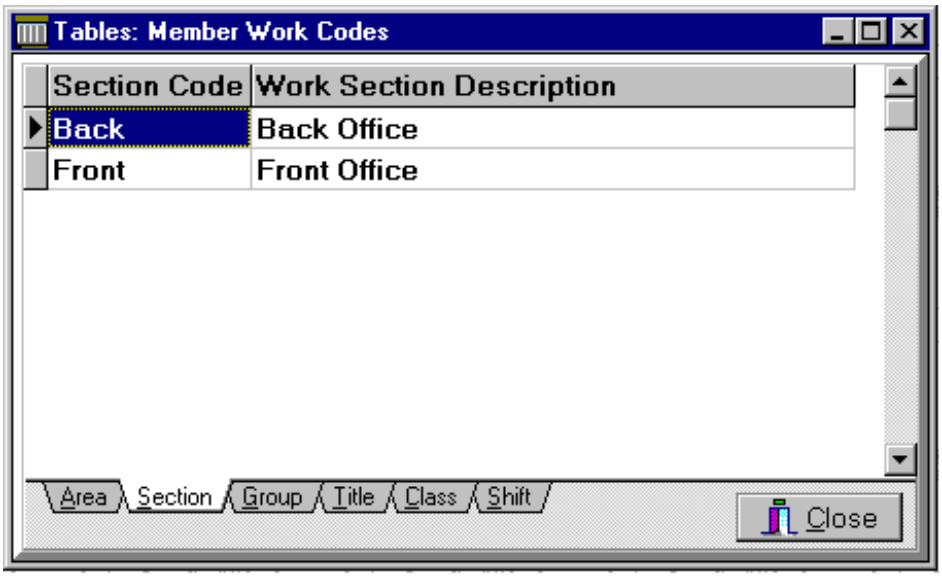
Member Work Codes

The following is shown when you run **Lists|Code Tables|Member Work**:

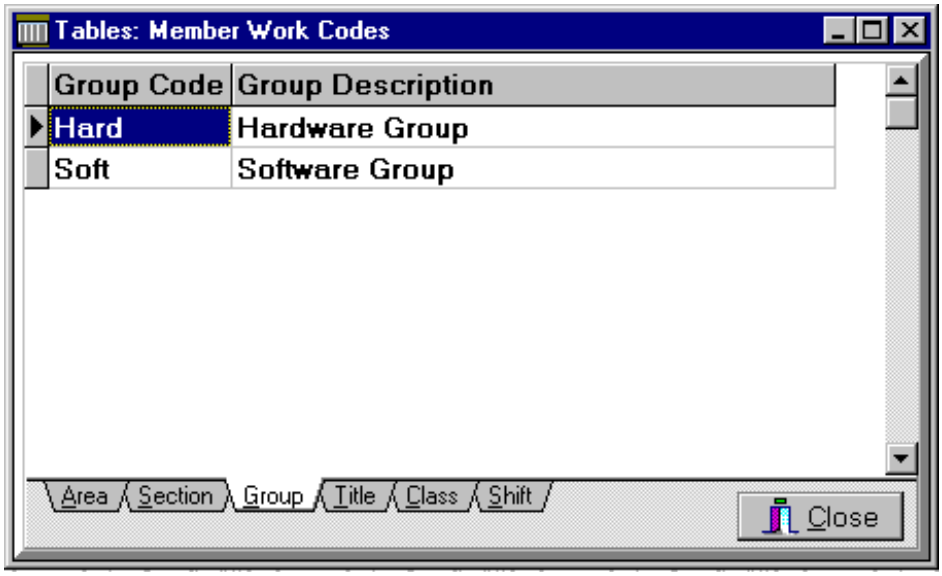
The following three tables are the Job Location Information Tables

This is the **Area** Table.





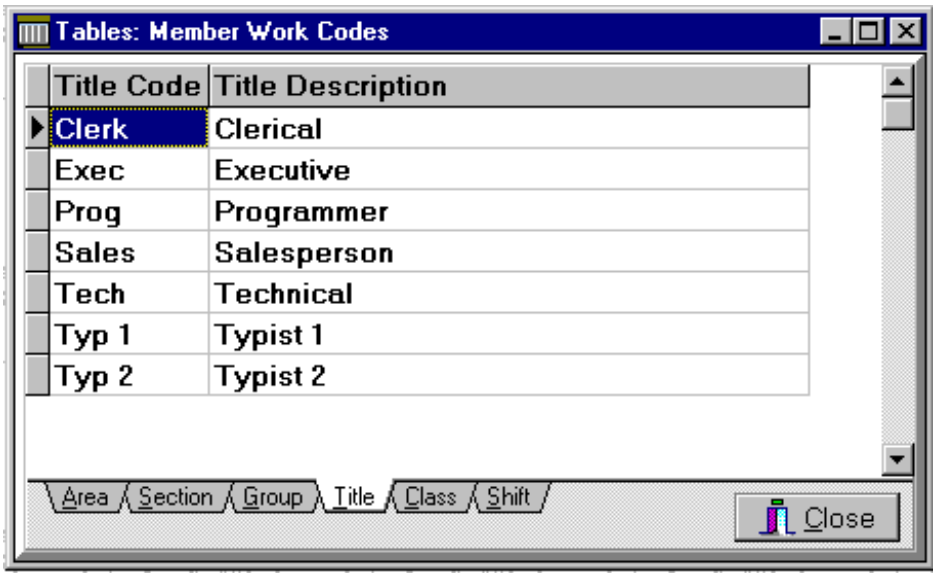
This is the **Section** Table.



This is the **Group** Table.

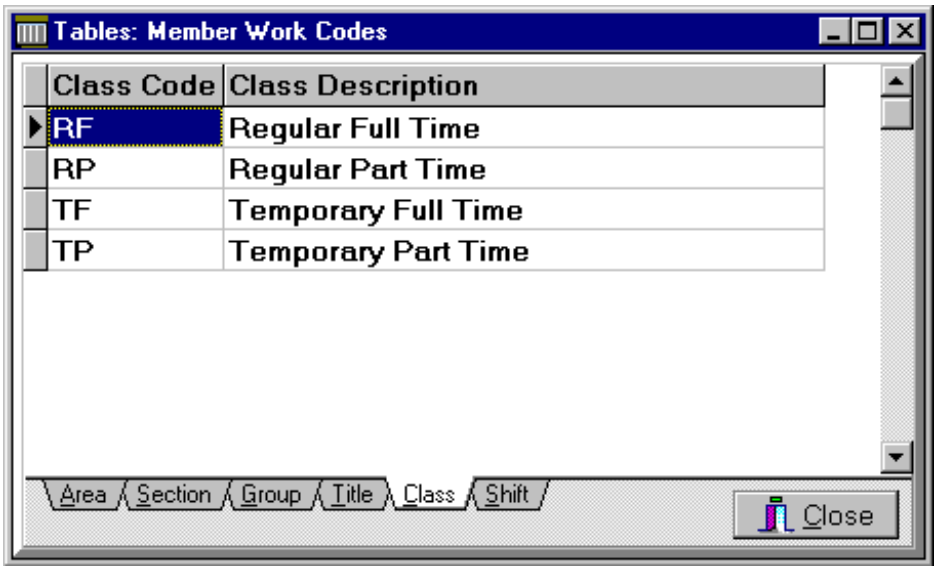
The following three

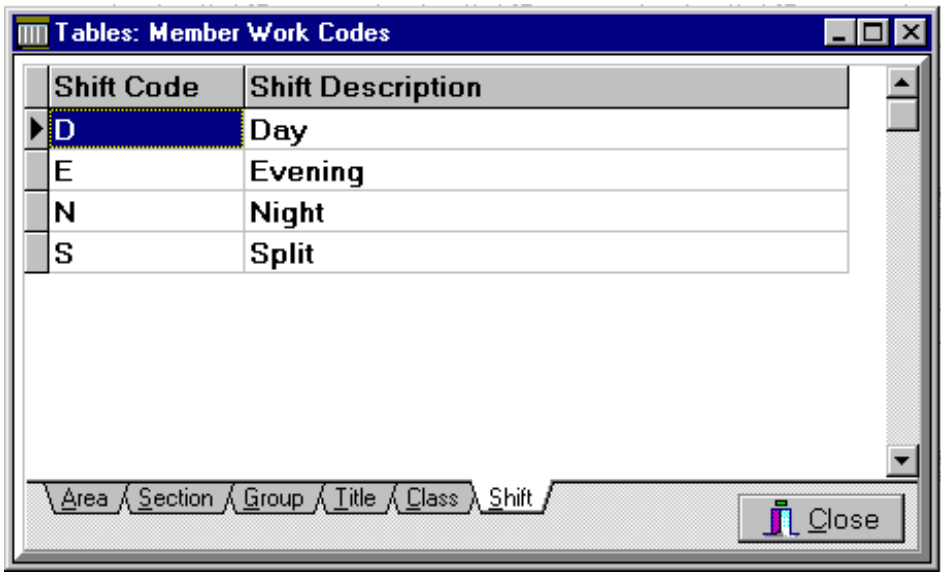
tables are the Job Classification Tables:



This is the **Job Title** Code Table.

This is the **Job Class** Code Table.



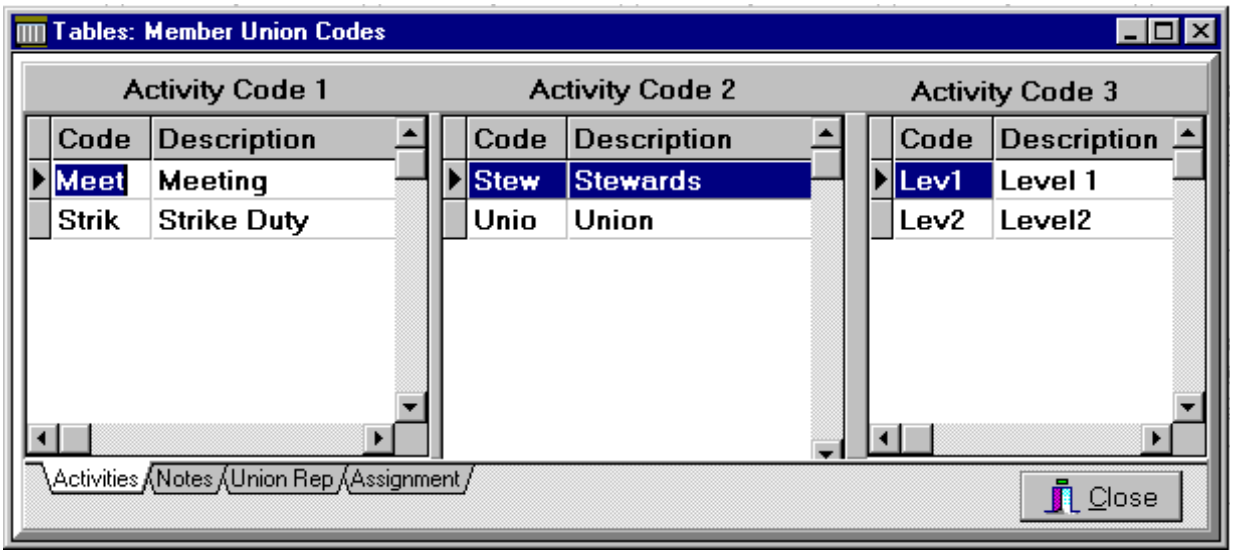


This is the **Shift** Code Table.

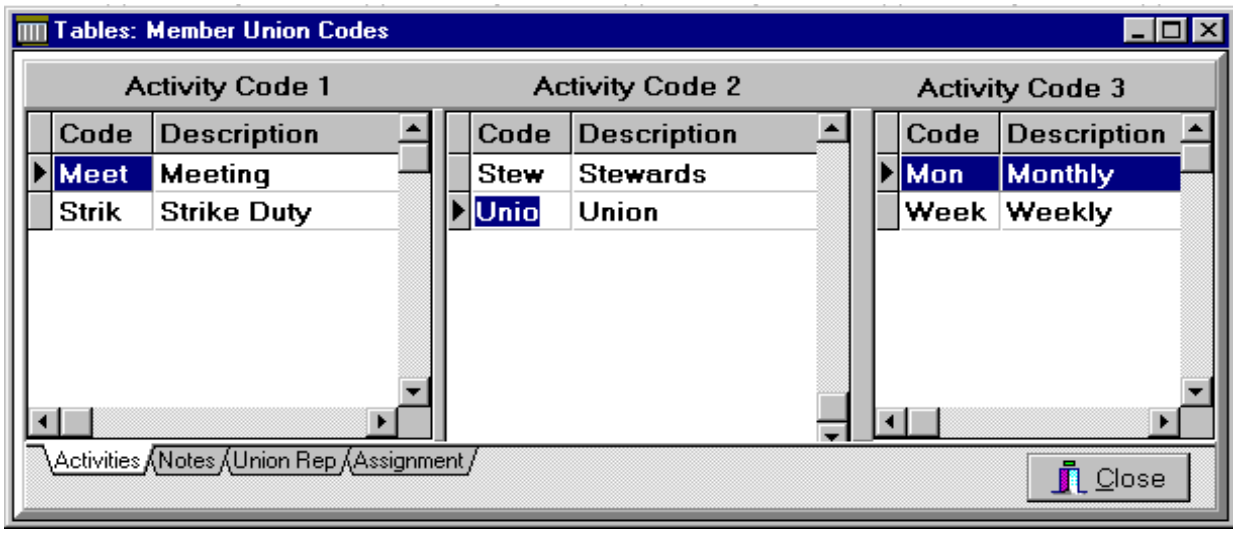
Member Union Codes

The following is shown when you run **Lists|Code Tables|Union**:

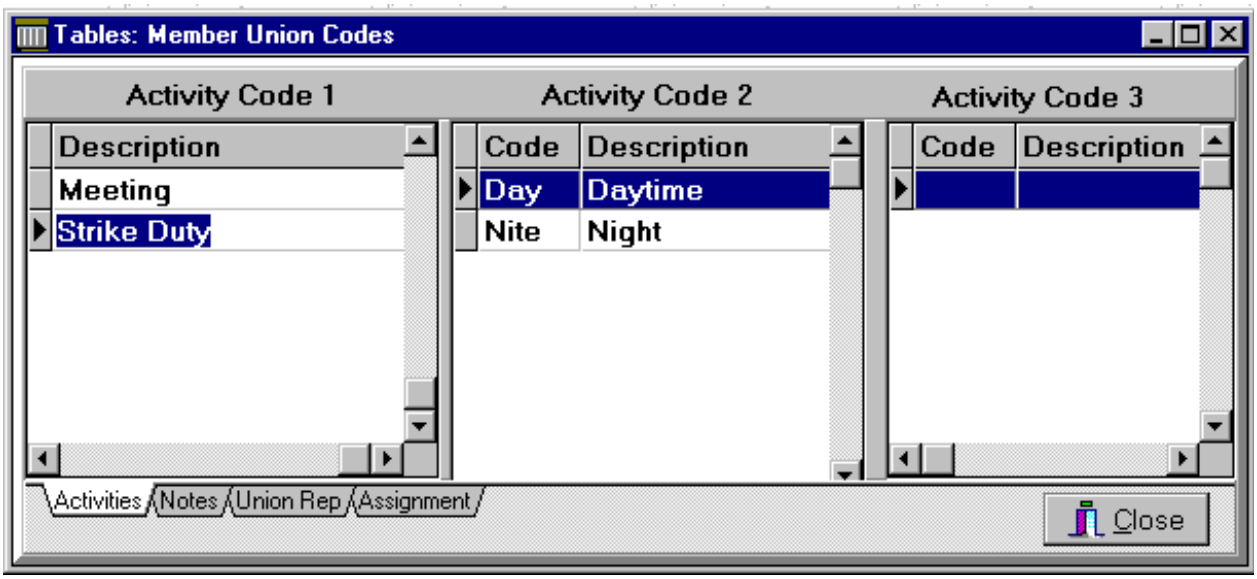
Activity Codes:



There are three levels to Activity Codes. In the above example the Activity "Meeting" has a sub category for "Stewards" & "Union". With "Stew" highlighted there are two codes under it called "Lev1" and "Lev2".

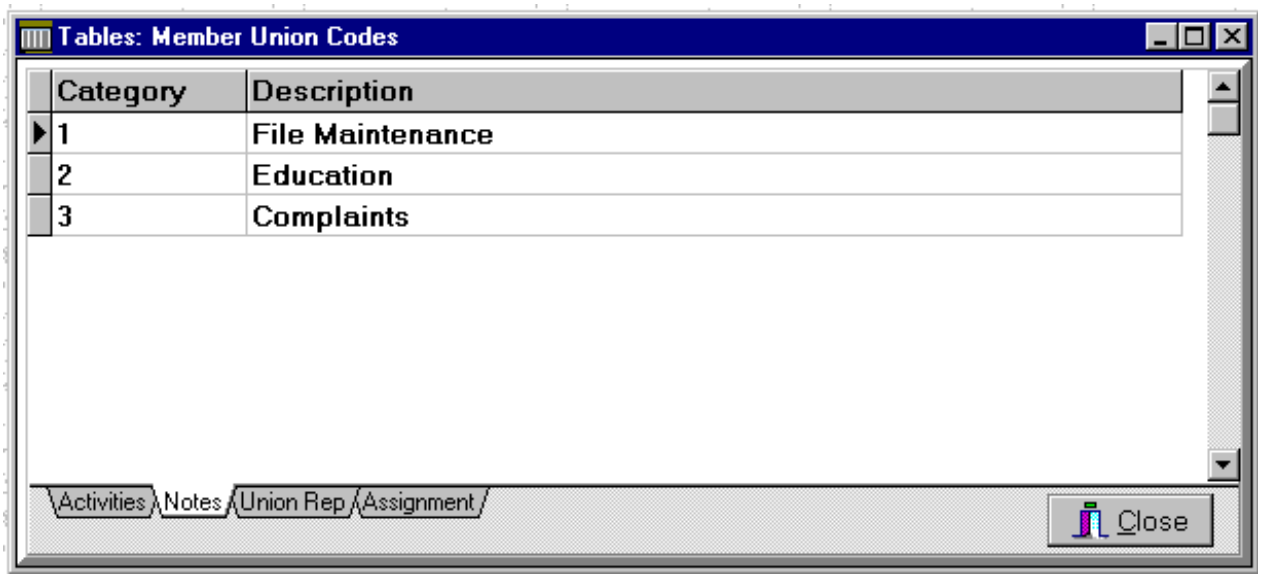


In the above example we clicked on "Union" in the center to show its third level codes of Monthly and Weekly.



The above example we highlighted “Strike Duty” and see Daytime and Night sub-categories. Notice we do not have to have a third level code.

Notes Codes:



This is **Notes** Code Table. This is used to establish the categories for notes and comments.

Tables: Member Union Codes

Code	Description
BA	Business Agent
Exbd	Excutive Board
Mobl	Mobilizer
Pres	President
S/T	Secretary Treasurer
Sec	Secretary
Stew	Steward
Stml	Steward/mobilizer
Trea	Treasurer
VP	Vice President

Activities | Notes | Union Rep | Assignment

Close

Tables: Member Union Codes

Assign Code	Assign Description
BARG	Bargaining Committee
COPE	Political Action Committee
ELEC	Election Committee
GRIV	Grievance Committee
H&S	Health and Safety Committee

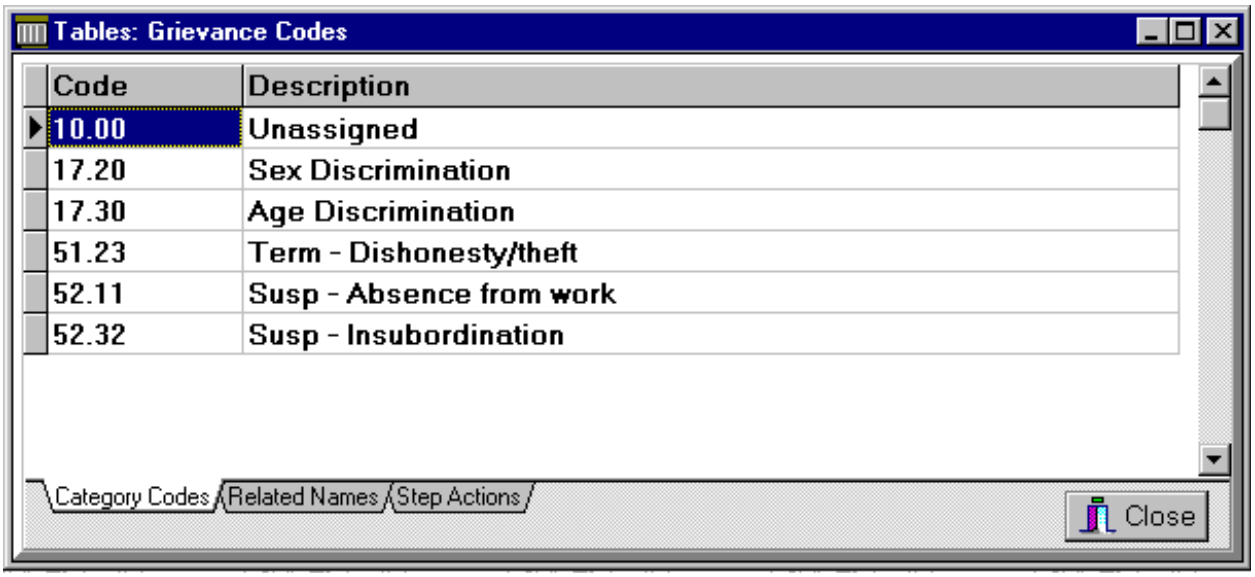
Activities | Notes | Union Rep | Assignment

Close

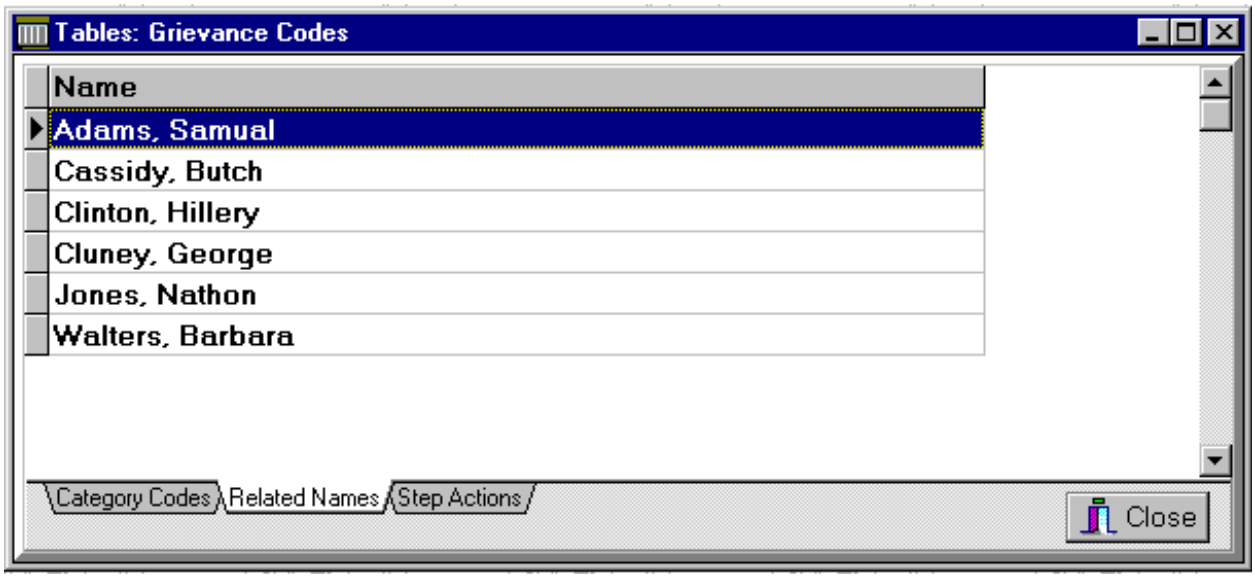
Above are the **Union Rep** Code and **Assignment** Code Tables. These are used to assign union representative positions and union committee assignments.

Grievance Codes

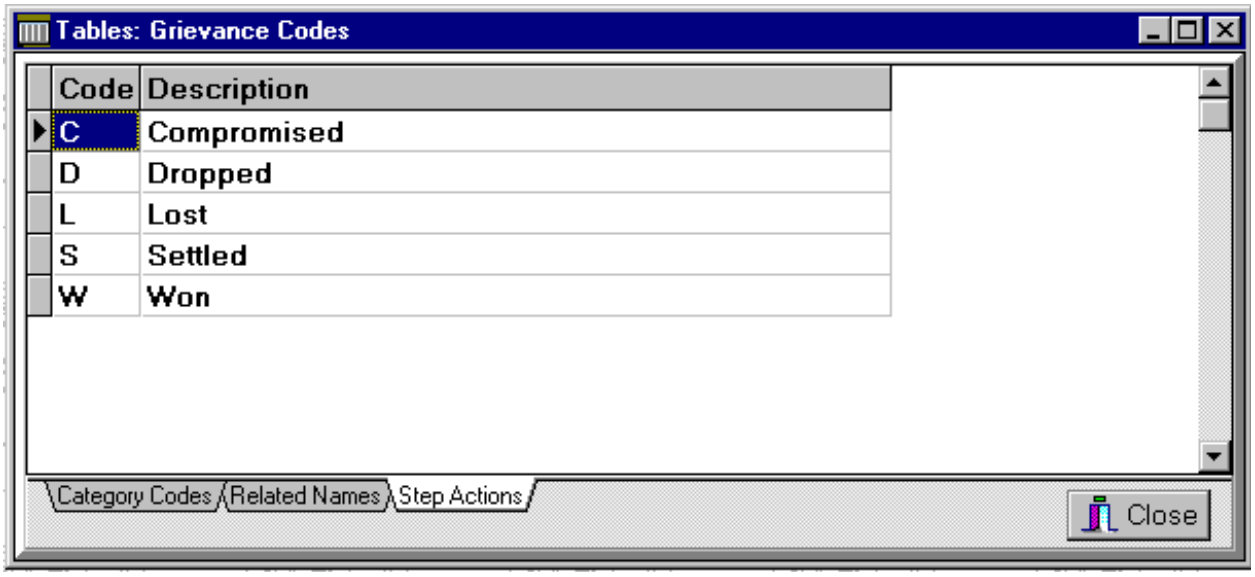
The following is shown when you run **Lists|Code Tables|Grievance**:



The above table is used to establish Grievance Category Codes. Any coding scheme can be used.



The above table is used to store the names of Steward, Business Agent, Supervisor and Managers. This same grievance names table is used for the individuals involved in Arbitration.

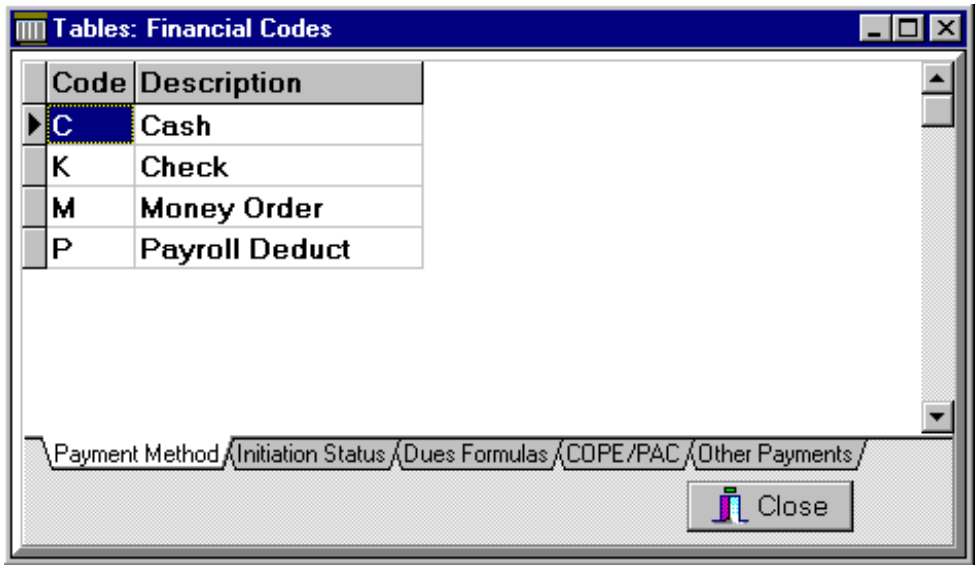


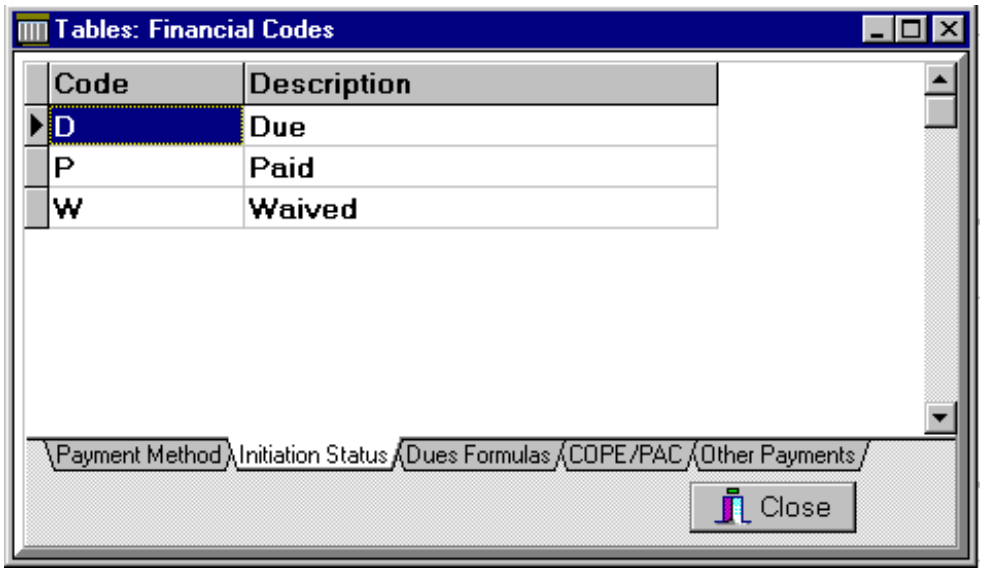
The above table is used to create Action Descriptions for the Step screens. You can create your own action codes on this screen.

Financial Codes

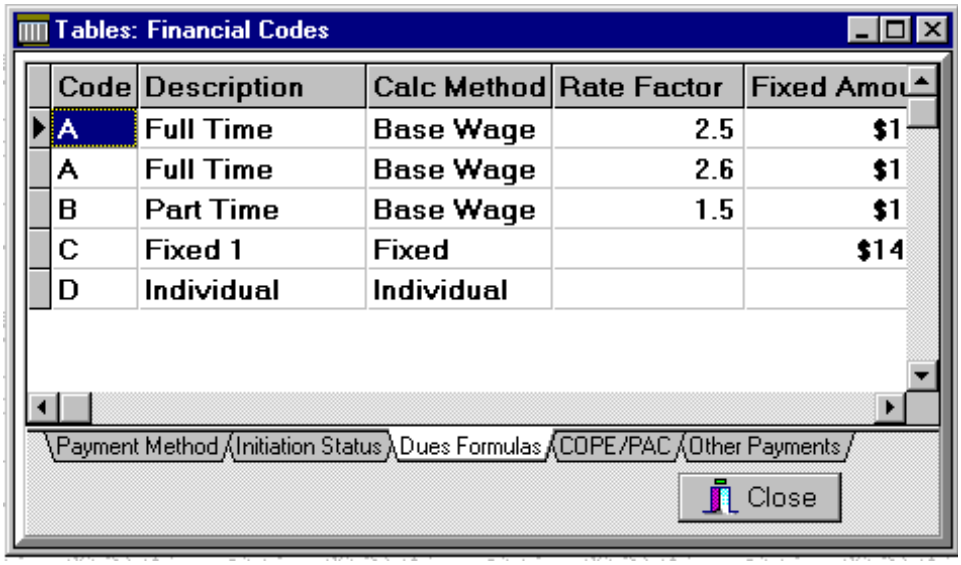
The following is shown when you run **Lists|Code Tables|Financial**:

This is the **Payment Method** Code Table.



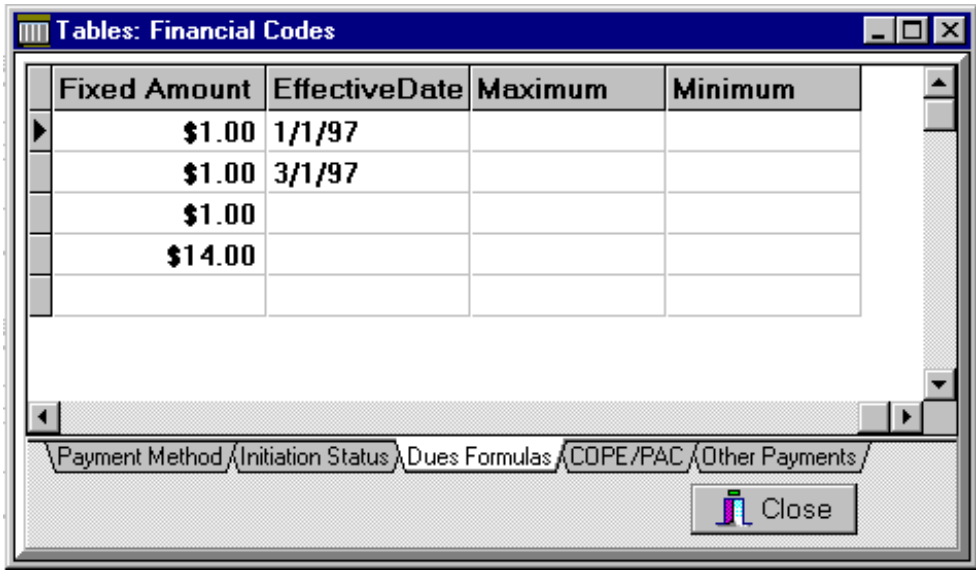


This is the **Initiation Status** Code Table.



This is the important **Dues Formulas** Tab. This is used to setup a variety of dues codes and the calculation method of Base Wage, Fixed or Individual.

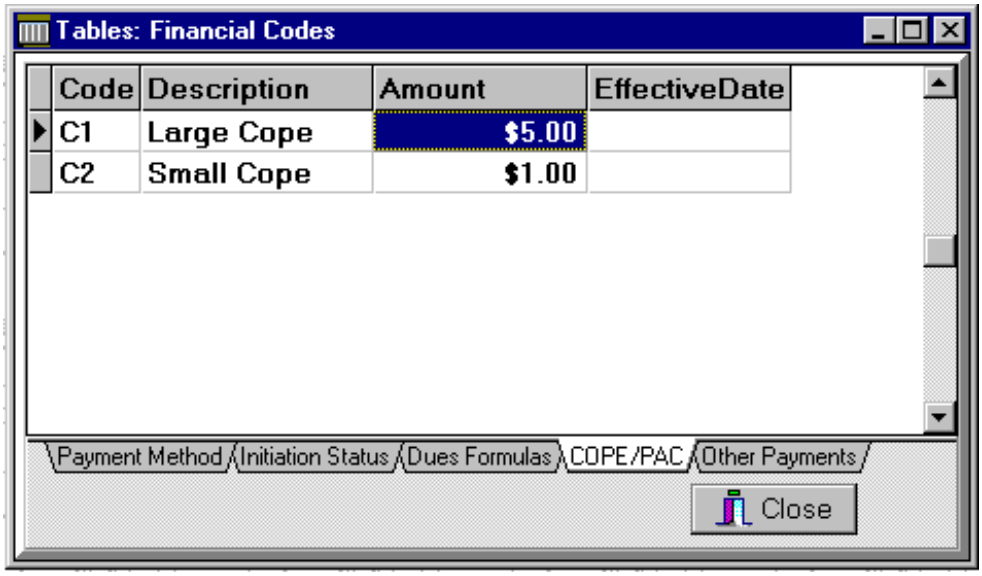
The table is wider than the window. This shows the additional fields to the right of each entry.



The Base Wage method allows you to enter the Rate Factor to multiplied by the Base Wage located on the Member's Financial Tab. You can also have a Fixed amount that will be added to the calculation.

The Fixed Method uses the Fixed Amount field as a flat Dues amount for the given code.

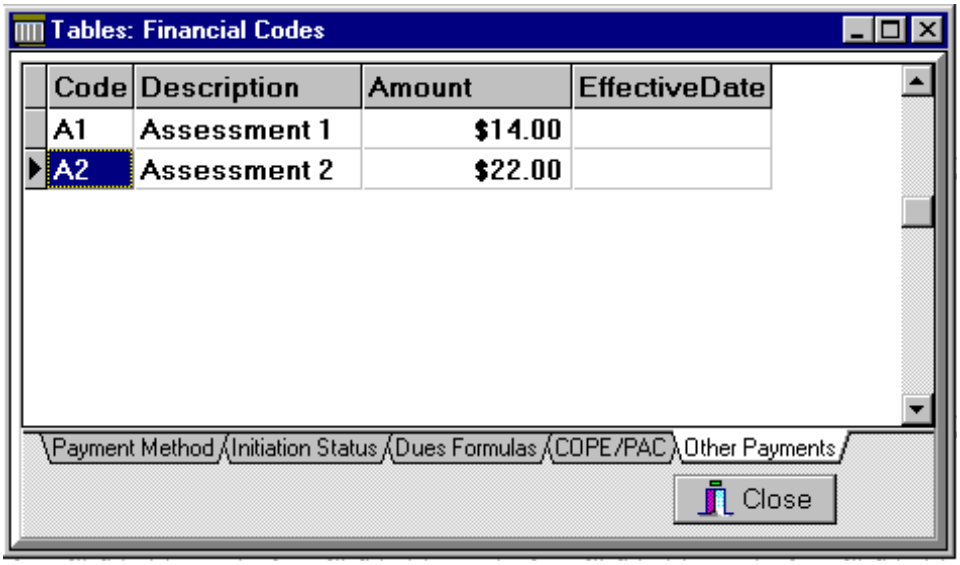
The Individual Method alerts the computer to used the "Ind Payment" field on the Member's Financial Tab as the Dues. In all cases you can have an effective date, minimum and maximum amounts.



This is the **COPE/PAC** tab.

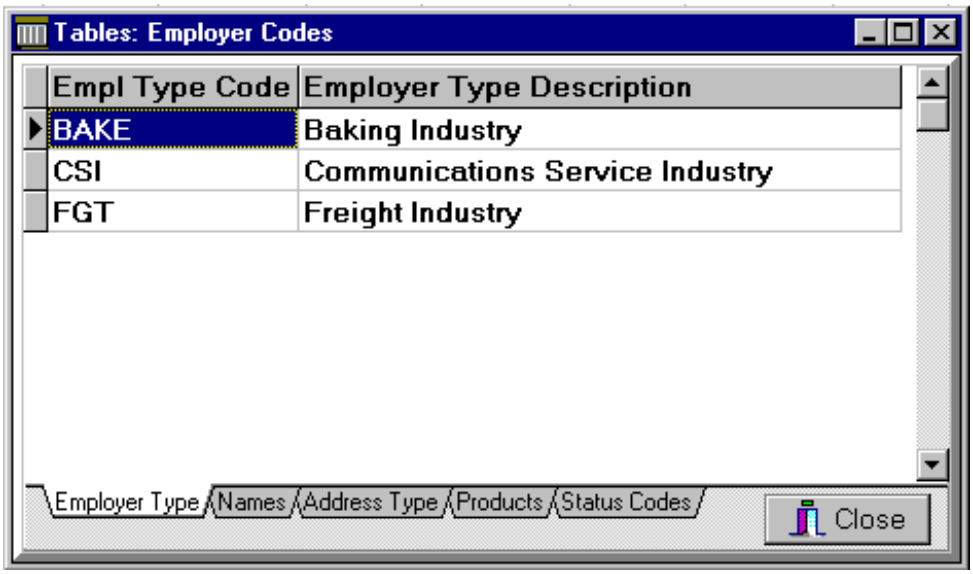
You can enter various codes that are used to determine the amount of COPE/PAC contributions.

This "**Other Payments**" tab is used to define other types of payments besides dues and COPE/PAC.



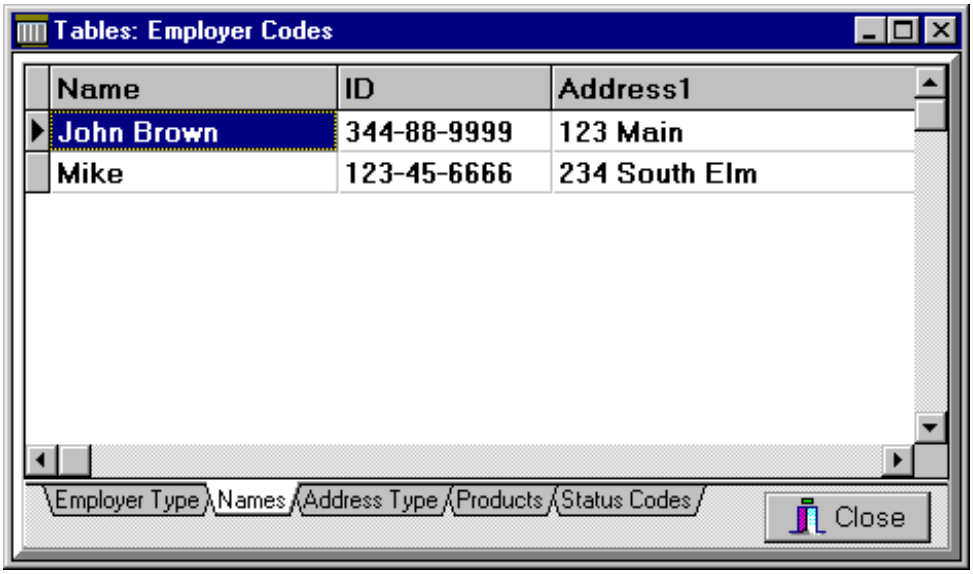
Employer Codes

The following is shown when you run **Lists|Code Tables|Employer**:

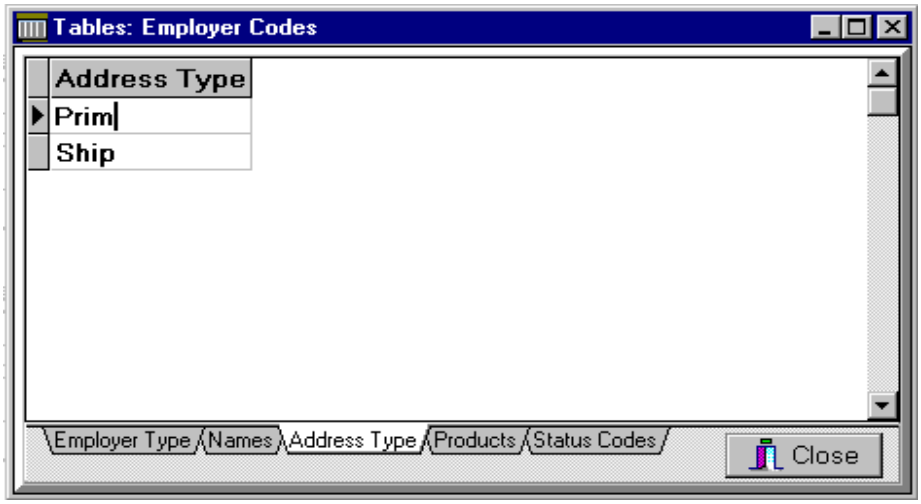


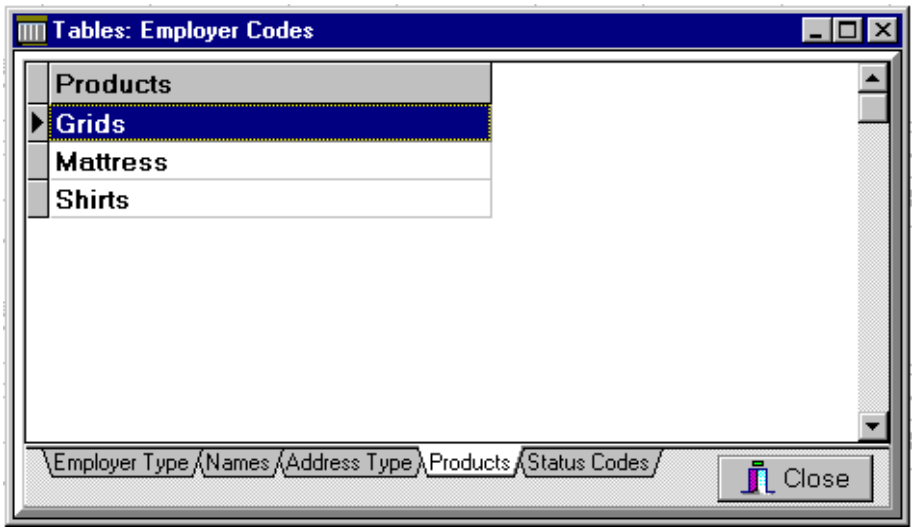
This table
is used to update the **Employer Type** Code Table.

This can be used to describe groups of related employers. There are two codes for each Employer. This can be used to describe the type of employer and/or a geographic location. There are also two codes for each Work Location.



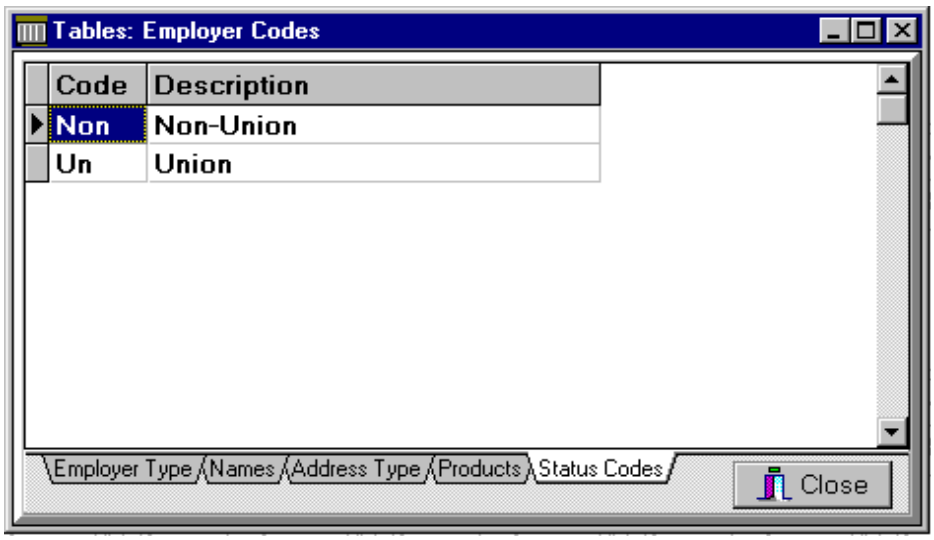
This is the **Employer Names** table. This can be used to setup officer names.





This is the **Address Type** code table used to describe additional addresses stored on an Employer's record.

This is the Employer **Products** code table.



This is the optional **Employer Status** Code Table. This can be used to denote Union/Non-Union or Active/In-Active, etc.

NOTE: If you do not plan on using a field within the member or employer database you do not need to establish valid codes for that field.

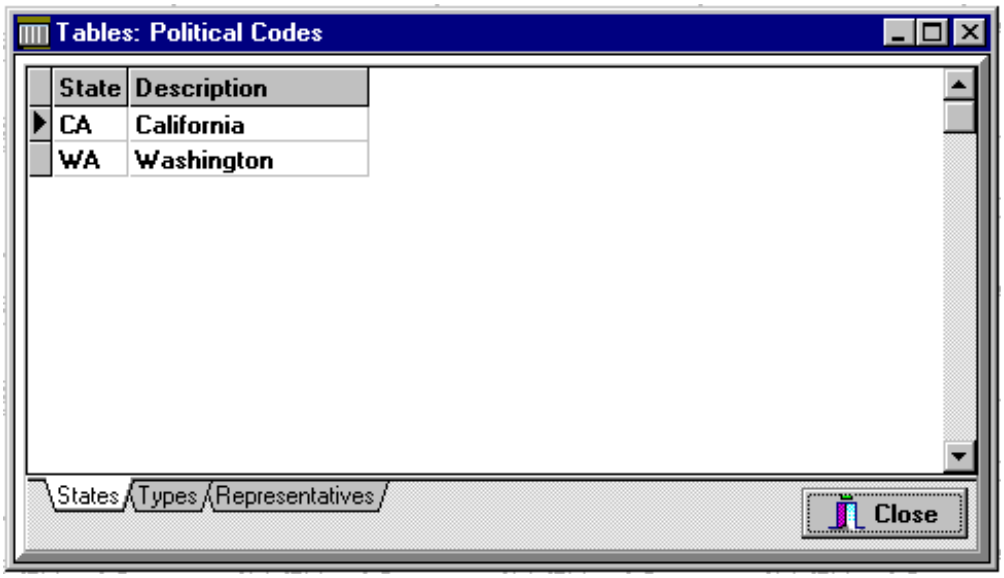
Political Codes

The following tables are used to establish Political Action fields. You can setup any type of political jurisdiction from the US Senate to a local school board. You can also set these up for a variety of states.

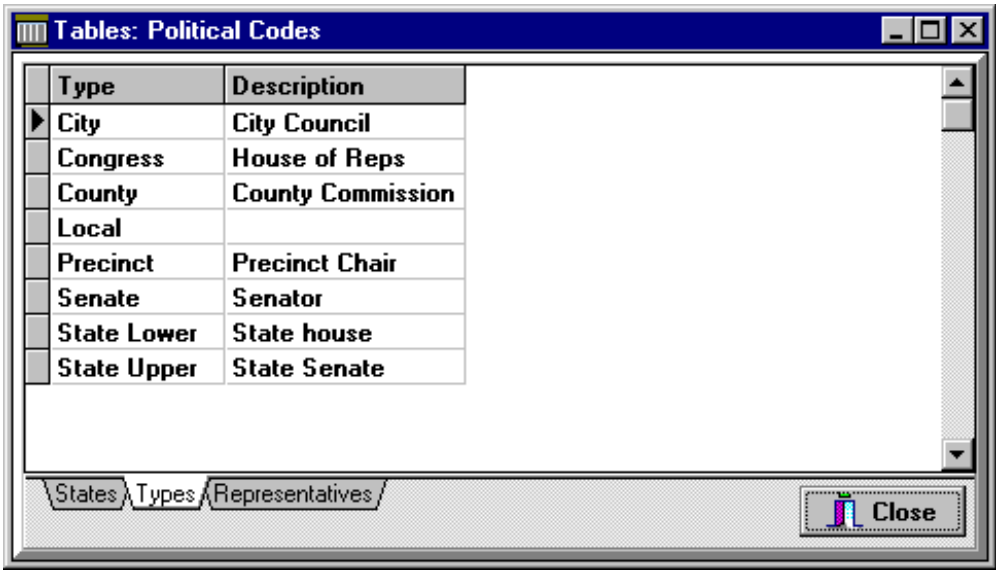
You access these tables with **Lists|Code Tables|Political**.

The first tab on Political Codes is the STATE tab.

This is used to establish all of the states you are going to reference in your union organization.



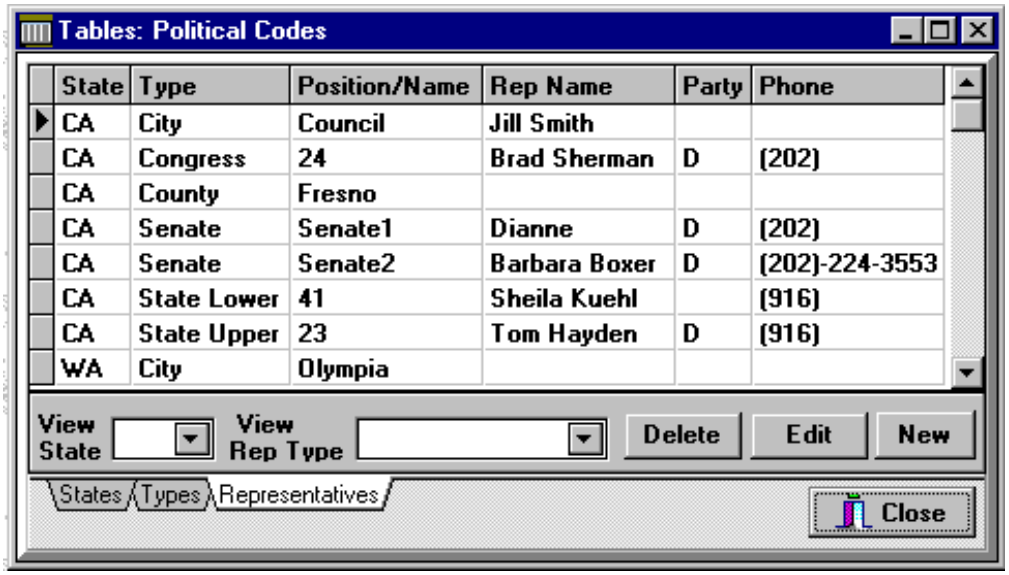
The next tab is TYPE. This is used to describe the type of political district. You can create your own and/or customize the ones you see here.



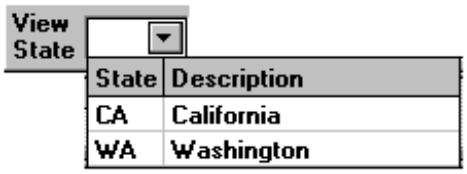
The last tab is the Representatives Tab.

This is the key to the whole political action table.

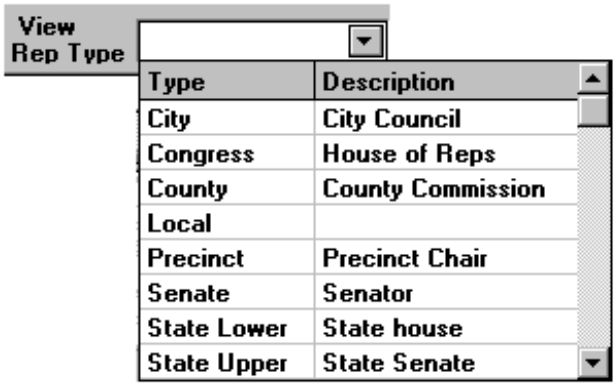
These are all of the combinations of State, Type and Position.



Position can be a voting District number or a name. In the case of the US Senate, we recommend using Senate1 and Senate2 for the two Senators. In the case of a city council that does not have numbers, use Seat1 thru Seatx.

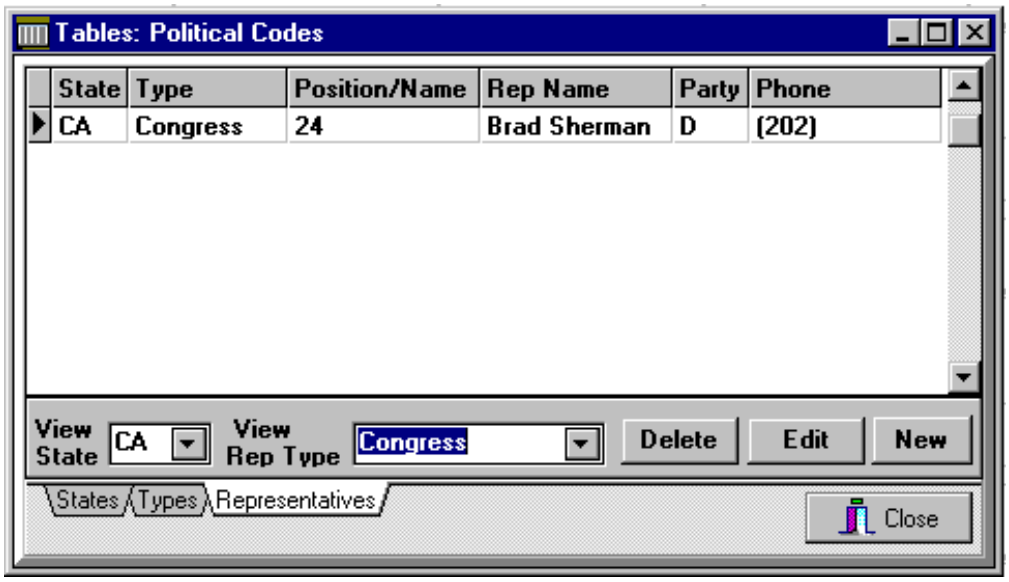


You can use the View State button to restrict the view to just one state and the View Rep Type to restrict it further to just one type of voting district.



This example shows CA & Congress as the viewing choice.

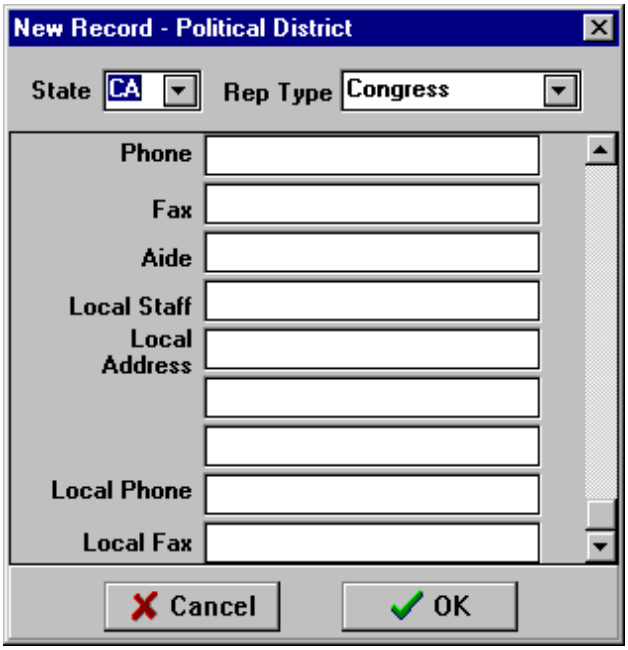
On this Grid you can use the Delete, Edit or New button.



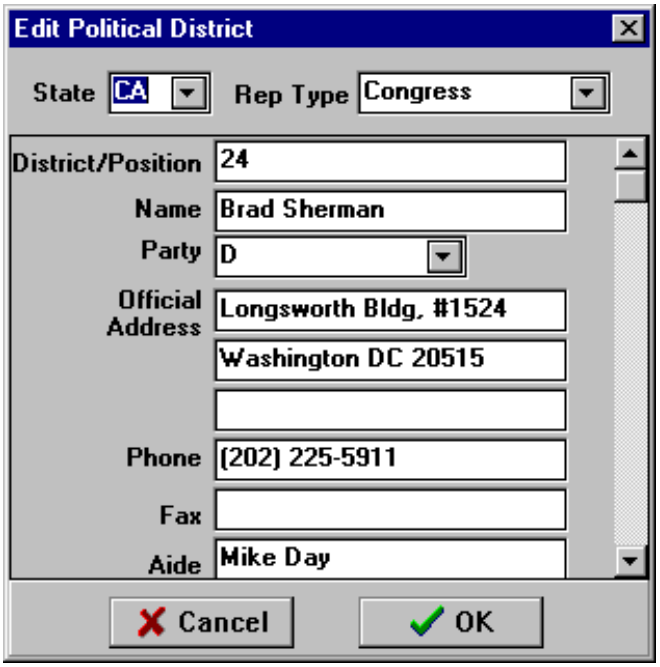
This is the result of pressing the NEW button. The State and Rep Type will be pre-filled if the prior screen was set to view these items.

The State and Rep Type can be changed by using the pull-downs next to the fields.

At a minimum you should establish the District/Position name to identify the voting district. There is room to hold the name of the representative, their party, official address, phone, fax and aide.



If you scroll down you will see the additional information fields to hold Local Staff person, Local Address, Local Phone and Fax numbers.



This is an image of the EDIT feature. It is the same as the add layout with the data showing that can be edited.

Chapter 3

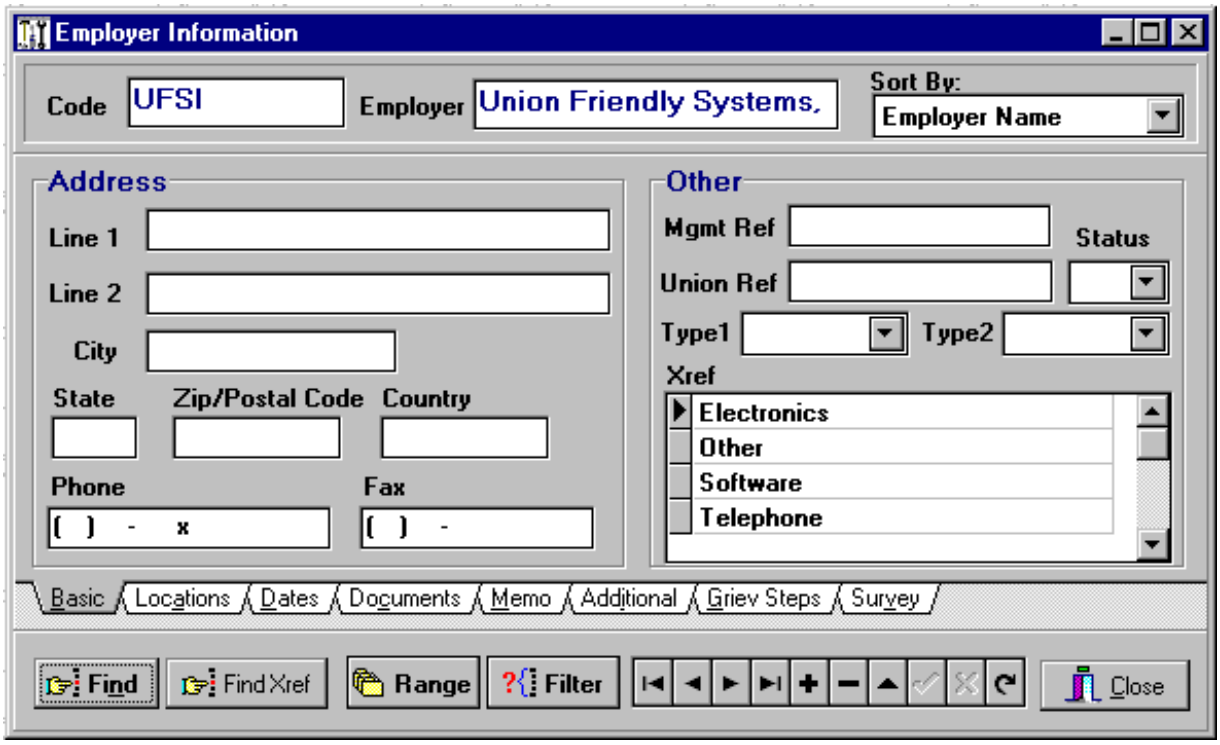
MUMS/2000
Employer & Work Locations

Employer Information

The Employer Information form can be requested by any of the following:

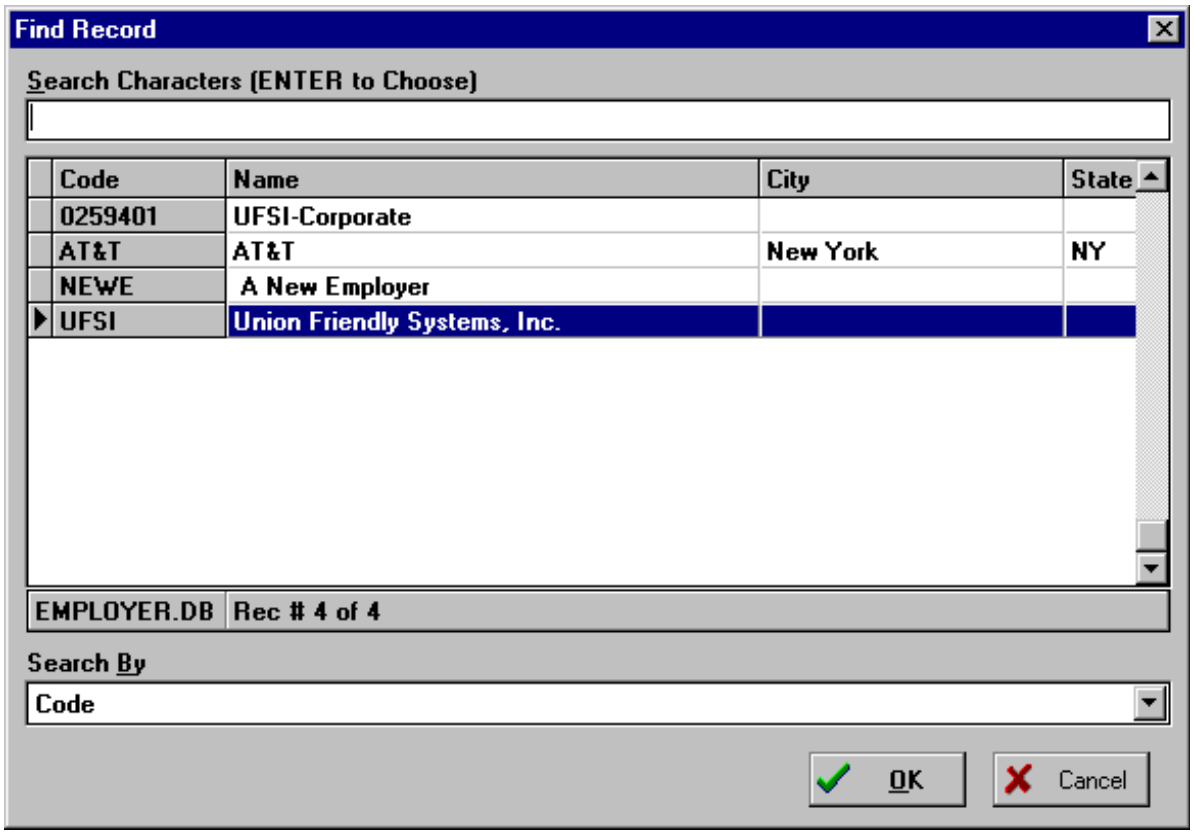
- ? MUMS /2000 Menu of **List|Employers**
- ? CTRL-E key
- ? Tool Bar Button for Employer
- ? "VIEW" button on the Work Tab of a member's record

This is the Employer Information form.

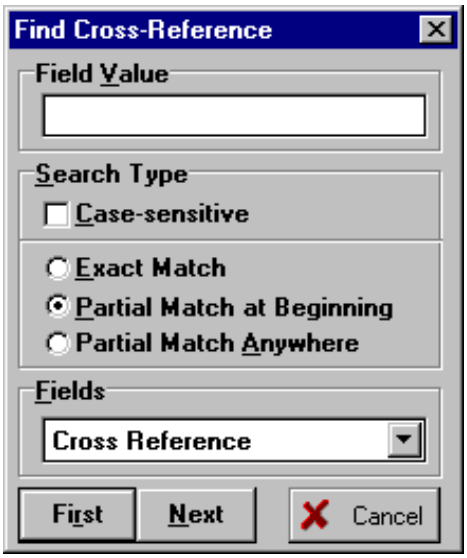


You can use the navigation bar, FIND, RANGE and FILTER to locate the employer record. You can even use the FIND-XREF button to search all references within the “Xref” area. There is a sort option to change the presentation of the records shown when using the navigation bar.

The FIND button calls up the MUMS/2000 Find function. You can select the search field and start to enter characters as the program does the search.



This is the FIND XREF feature.

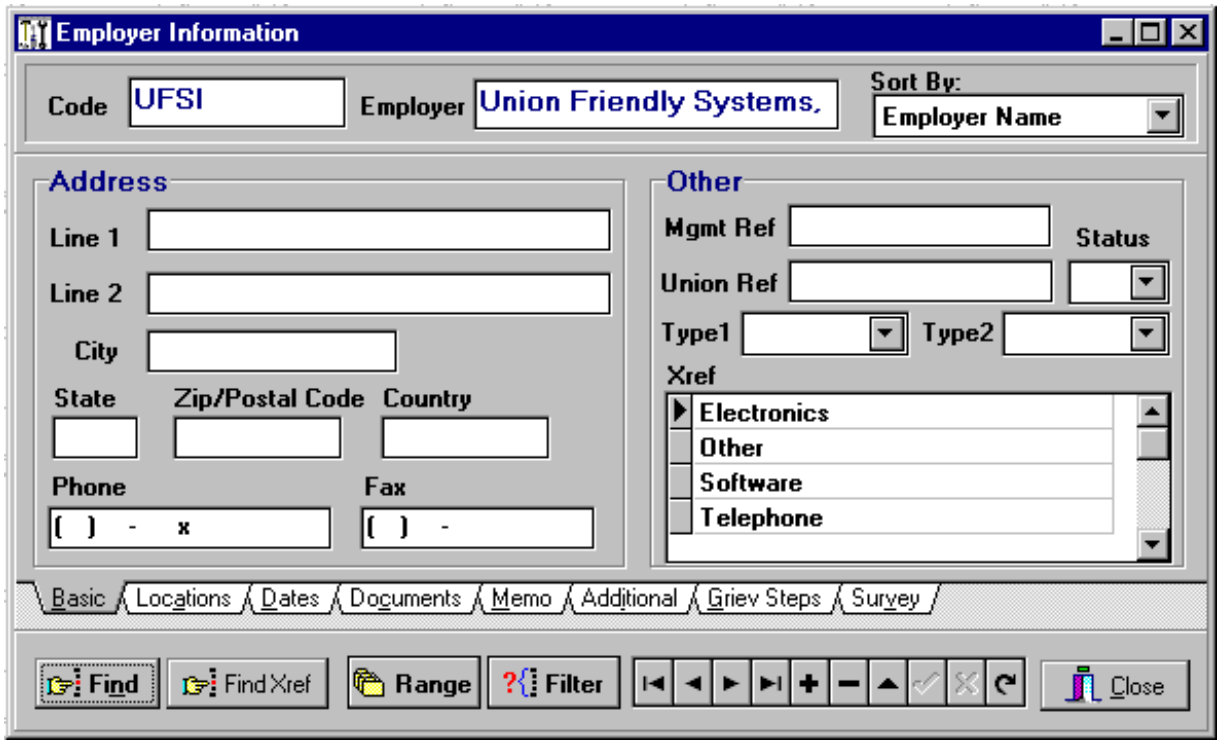


You can enter a value to search and indicate if you wish the search to be Case-sensitive. This means what you are searching for must match.

You can also search for Exact, Partial at Beginning or Partial anywhere.

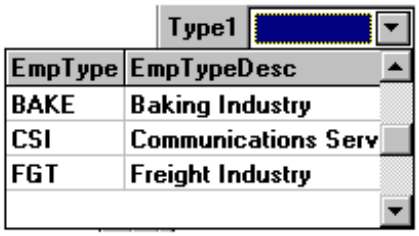
The FIRST button is used to find the first occurrence of the match and the NEXT is used to keep searching for other Employers who match the search.

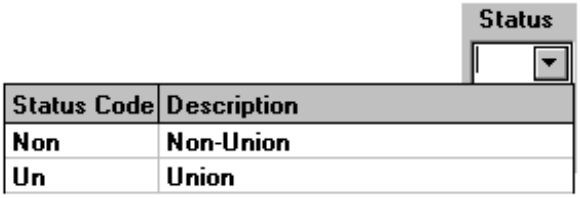
Employer Tab - BASIC



The above screen shows the "Basic" tab of the Employers record. The tabs on an employer's record are Basic, Locations, Dates, Documents, Memo, Additional, Griev Steps and Survey. The Survey tab can be disabled with the option in “Program Settings” on the System Information form.

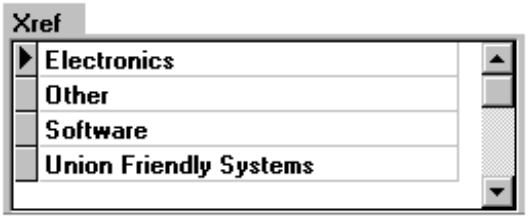
There are two "Type" codes on the Basic Tab that can be used to classify this employer.



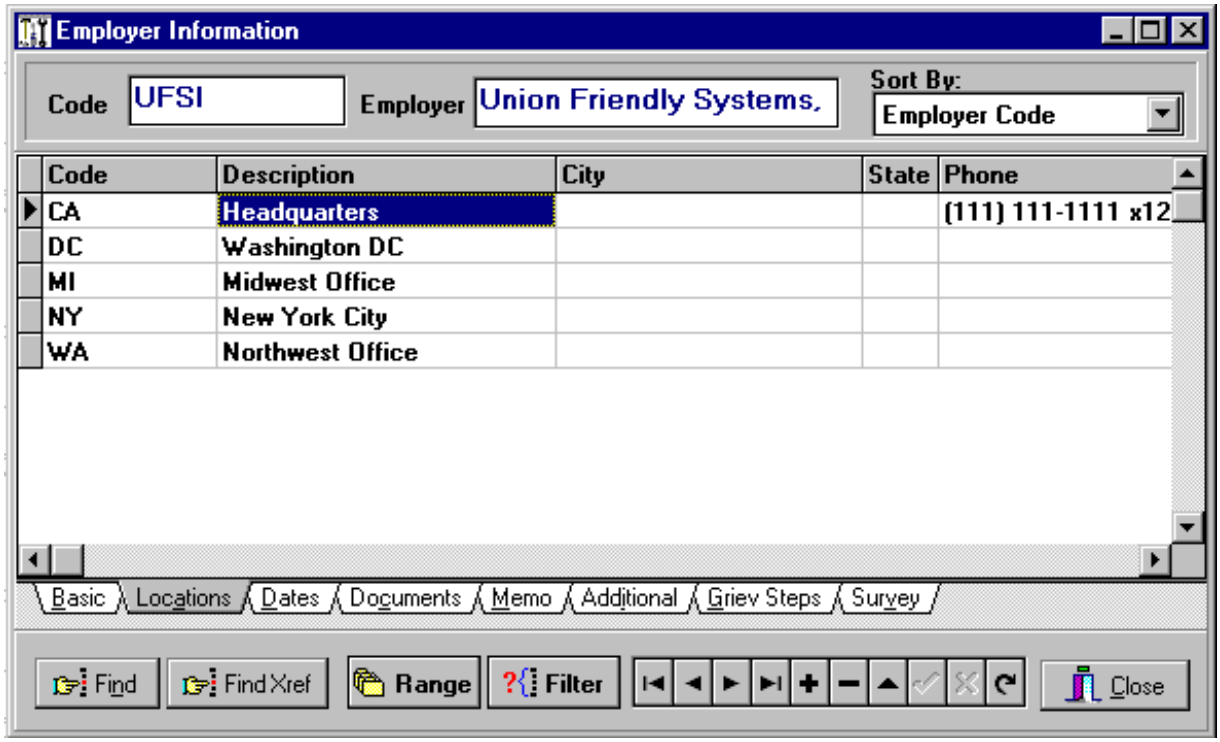


The optional Employer Status Code can be used to denote the status of this employer.

This is the Xref area. Here you can enter any cross reference information you wish. You use the INS key to add and CTRL-DEL to remove. You can use the ESC key to cancel any change. These are the same keystrokes used in table maintenance.



Employer Tab - LOCATIONS

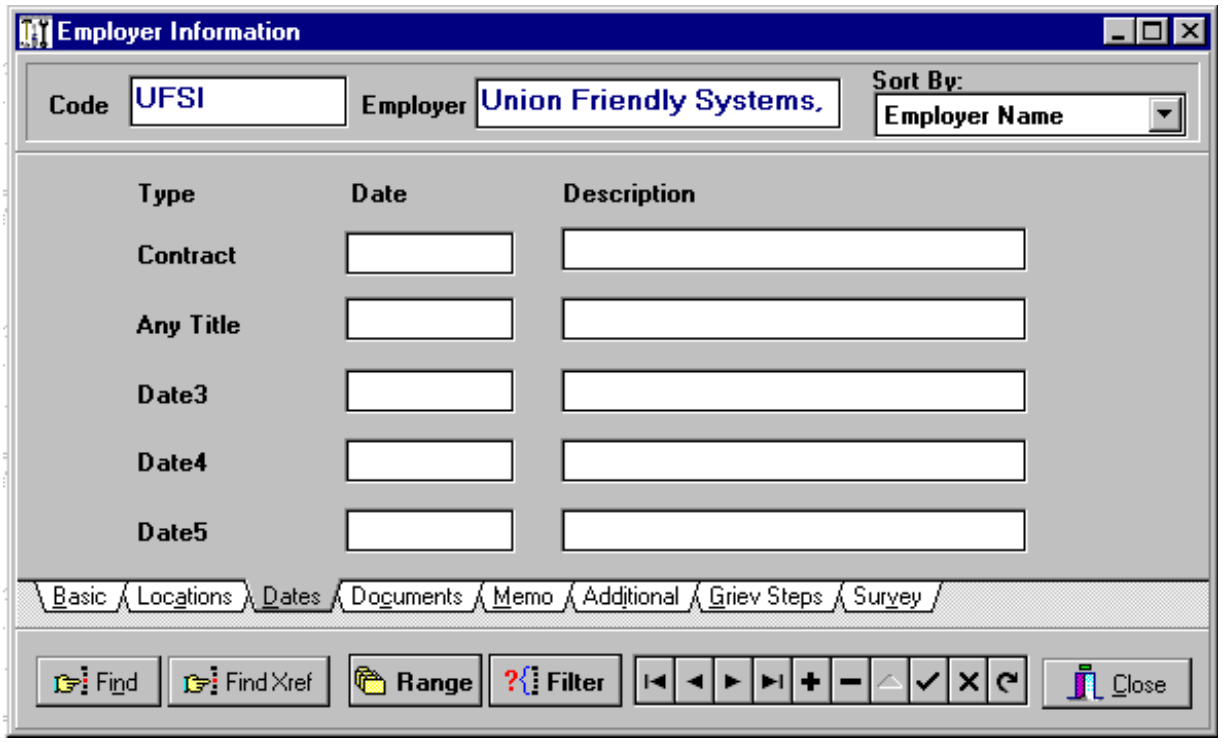


From this "Location" tab you can view the work locations that belong to this specific employer.

You can double-click to view the work location record. This will bring up the "Work Location Information" window. This will be reviewed in a few pages. From that screen you can add new work locations linked to an employer. Any new work location added will not show up on the employer list until you request to view a new copy of the employer records.

In other words, you add new locations only via "Work Locations Information" window by linking it to an employer. You do not add locations directly on the "Locations" tab of the employer.

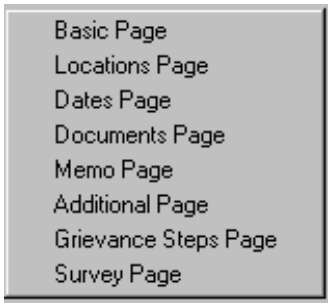
Employer Tab - DATES



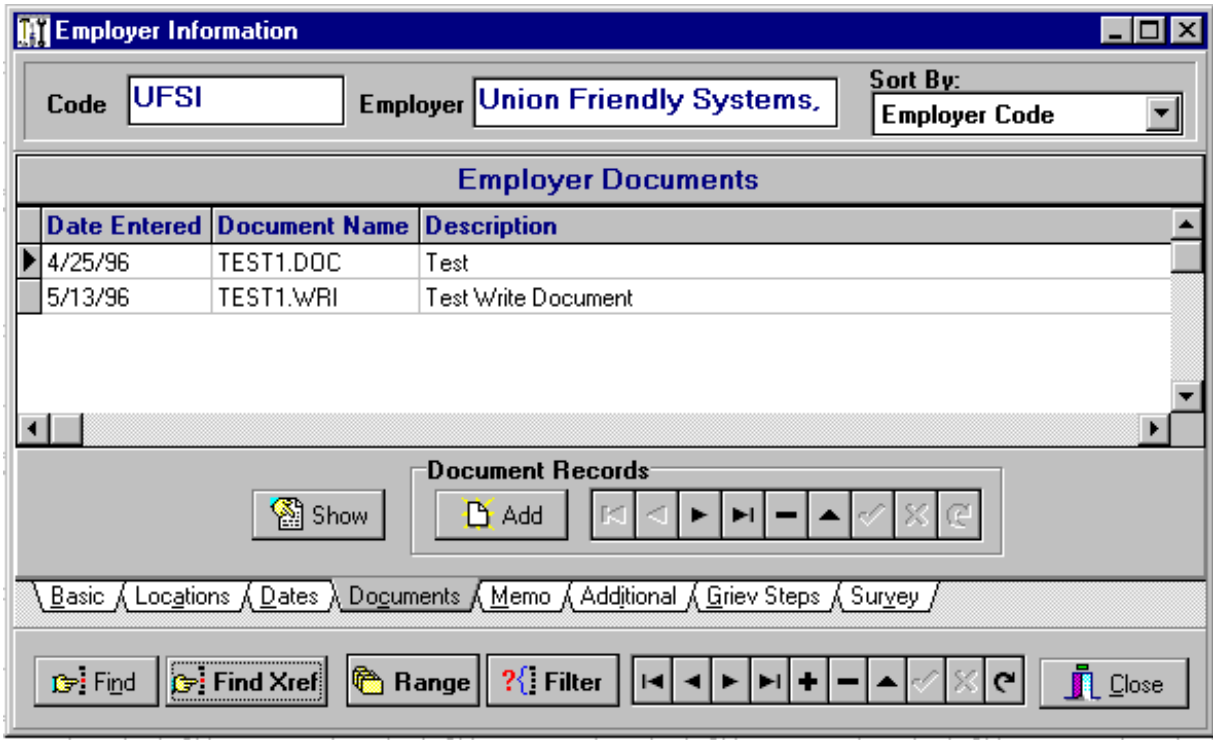
This is the screen to hold reminder dates for this employer.

The names next to each of the five dates can be customized under the “Field Settings” tab within the System Information form.

Note: If you press the right mouse button while on the Employer Information window a pop-up menu of the tabs will be shown to allow you to skip quickly to another tab.



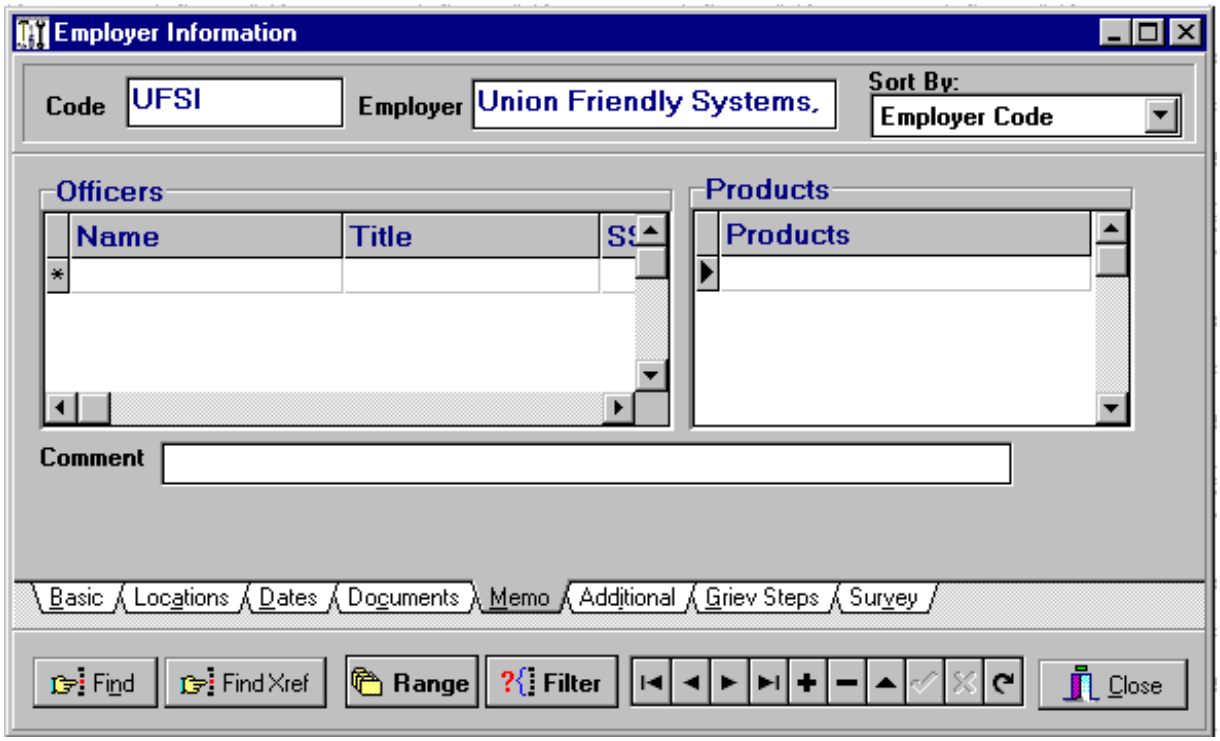
Employer Tab - DOCUMENTS



This is the attached document screen for this employer. This can hold images of correspondence or contracts.

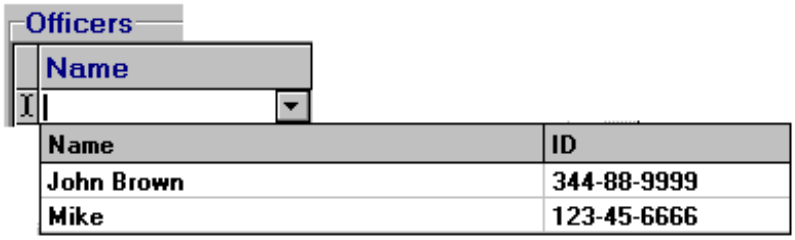
Please Note: **For more information on the use of Attached Documents see the Additional Information Chapter 8 at the end of this manual.**

Employer Tab - MEMO

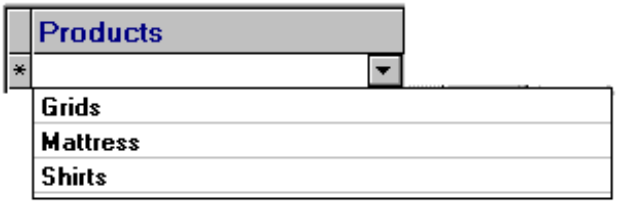


This is the Memo Tab. This is used to list Officers and Products. Again, to add information into a grid you can use the INS key and remove with CTRL-DEL. If there is a blank line already showing, you can use it for the first item.

The officers grid has a pull-down for previously entered names under the Employer code area.

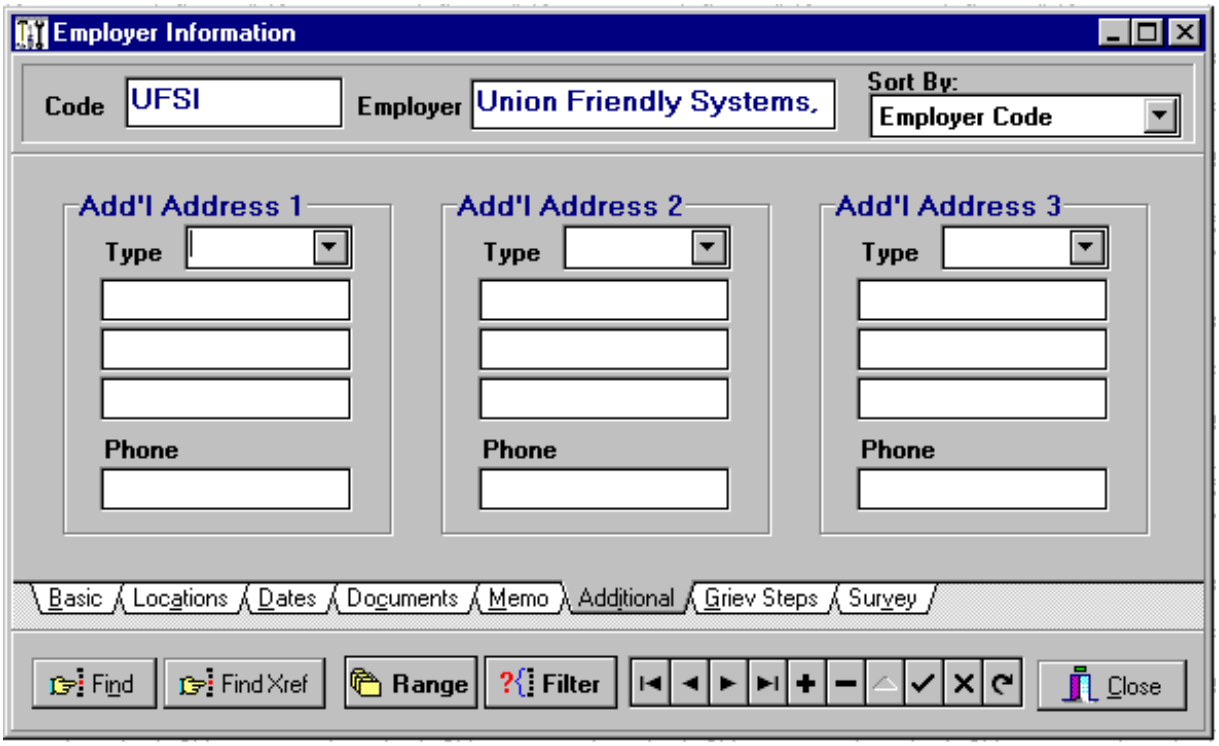


Once selected, the program will enter the SSN, Address and phone numbers, you can hand enter the officers title within this Employer.



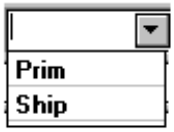
The Products also has a pull-down based upon the codes established previously.

Employer Tab - ADDITIONAL

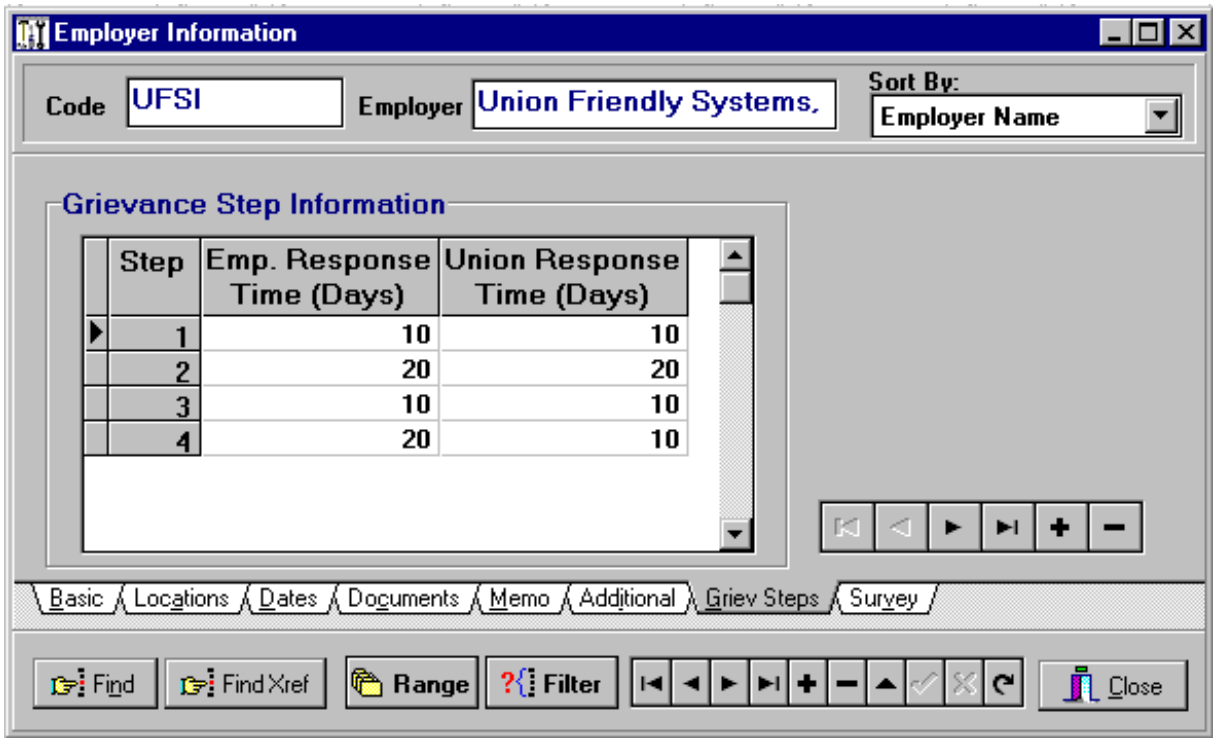


This TAB allows you to enter up to three additional addresses and phone numbers.

You can use the coded address types that you previously established.



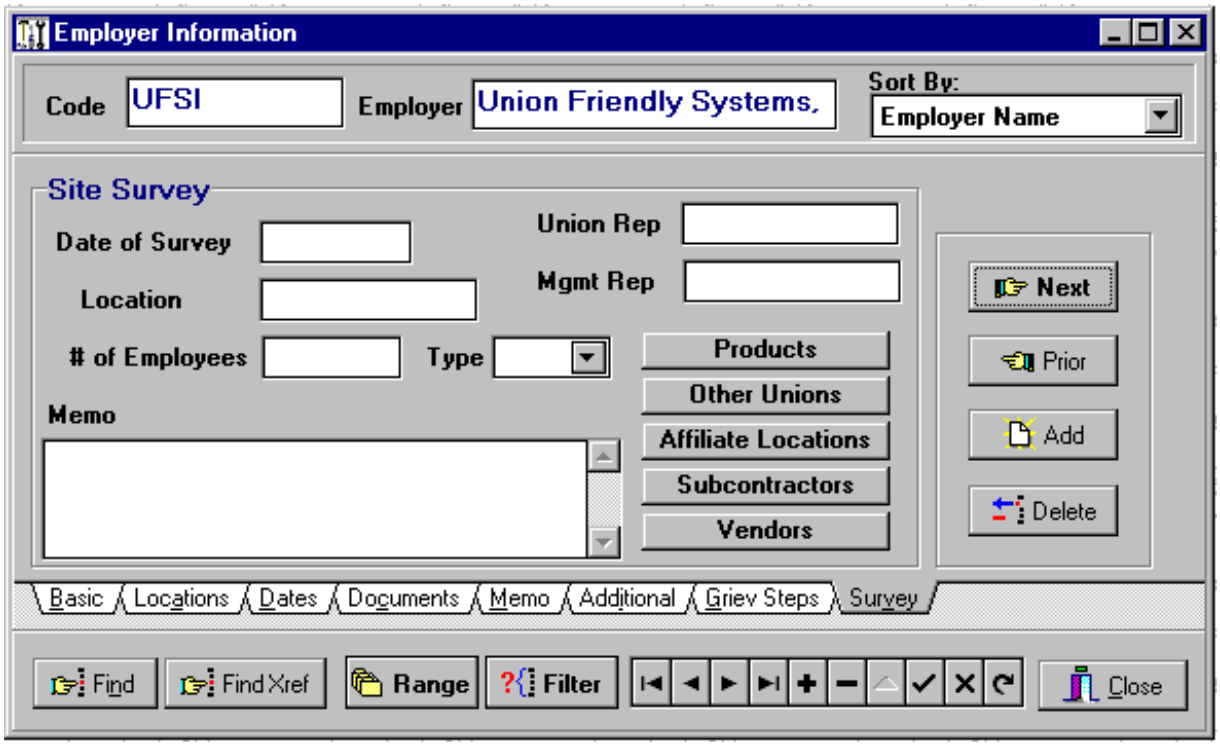
Employer Tab - GRIEV STEP



This Tab is used to establish the grievance response days for each step. You can use the navigation bar to add or delete steps. If you delete a step you must be sure that the remaining steps are in sequence from 1 to the maximum number of steps for this employer. You should only have to delete the last step, because you can always edit the days on each of the lines.

This grid determines the number of steps that will be allowed in the Grievance Tracking System. The days are used to schedule the Step due dates. Then each Actual date and the above table is used to schedule the next due date.

Employer Tab - SURVEY

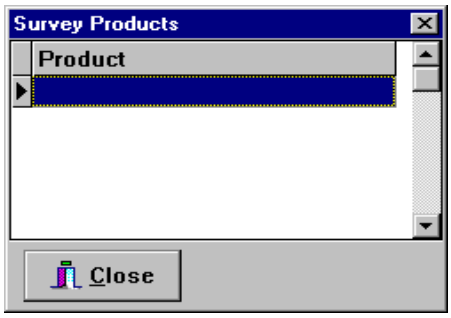


This is the optional Survey Tab. This can be deactivated with the option found on the "Program Settings" tab of the System Information form. You can have any number of survey forms for an Employer.

This area is used to navigate between surveys and to Add a new one. It can also be used to delete the survey shown.

When you add a new one, be sure to verify the Survey Date. All fields can be used including a Memo field and the pull-down for Employer Type.

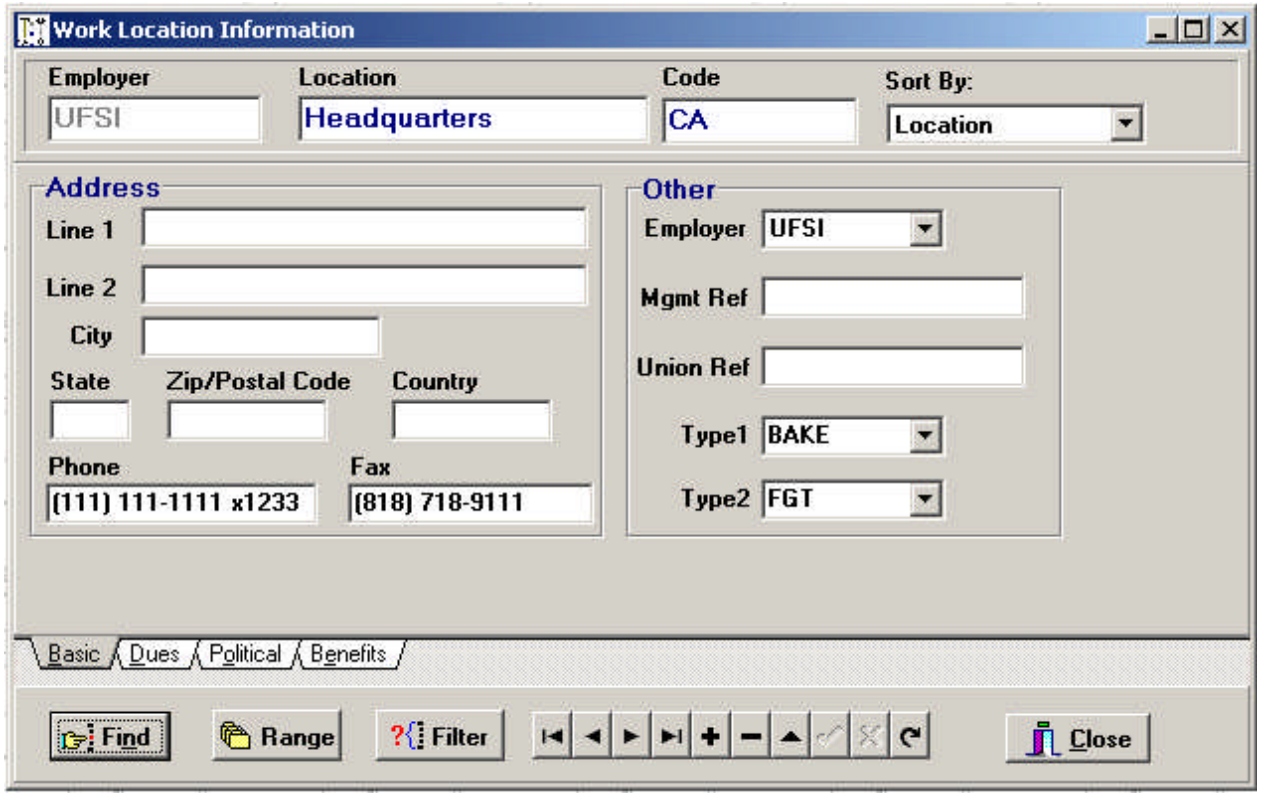
This area is used to store any number of lines of information organized by Products, Other Unions, Affiliate Locations, Subcontractors and Vendors. If you click on any of the five buttons a new area will open for you to input or view any number of entries.



Work Location Information
Basic Tab

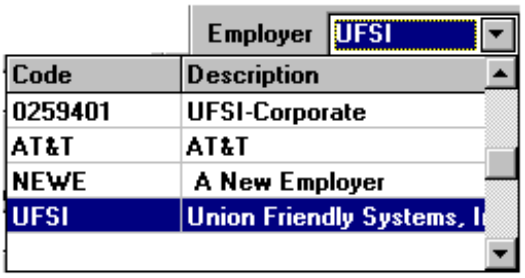
The Work Location Information Form is accessed by any of the following:

- ? MUMS/2000
- ? CTRL-L
- ? "VIEW" button on a member's work tab
- ? Double-Click on Location Tab within Employer Information



You can use the NAVIGATE, FIND, RANGE or FILTER to locate work location records.

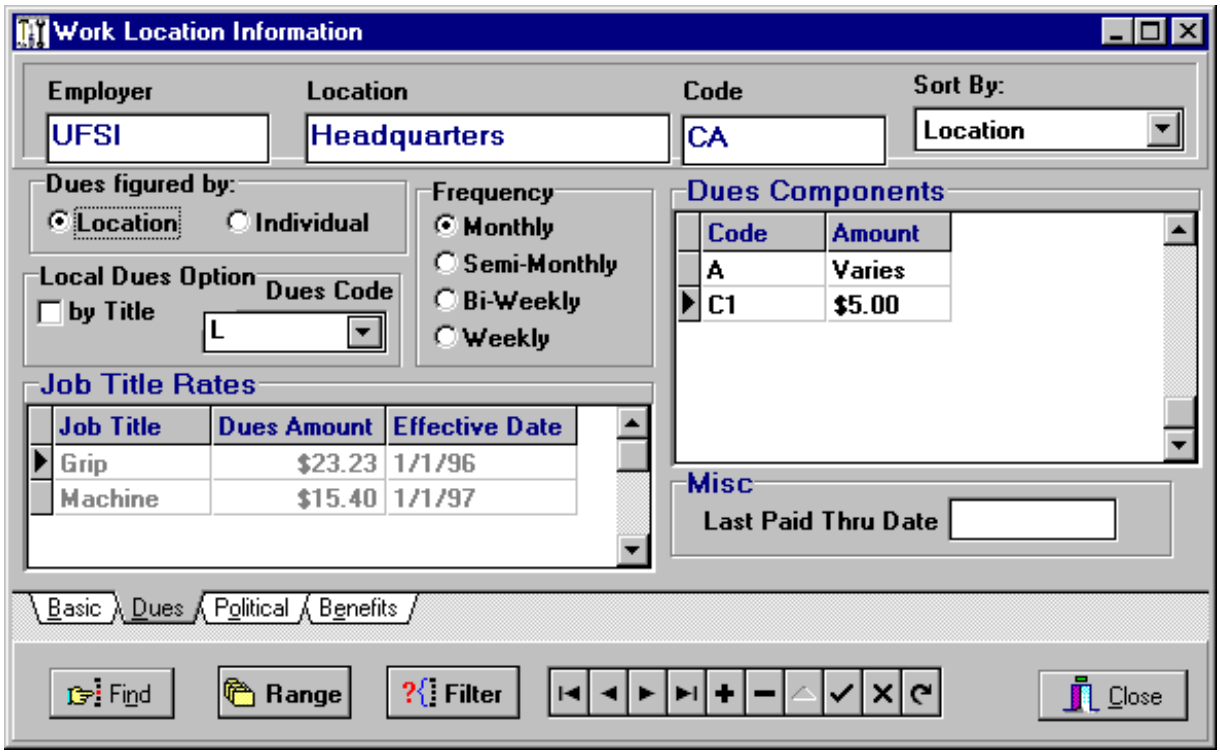
One very important field is the "Employer" field. This is used to link the work location to the employer. This is what makes this location appear under the location tab of an employer.



Notice you can again insert a type of work location, using the employer type

table you have established.

Work Location Tab - DUES

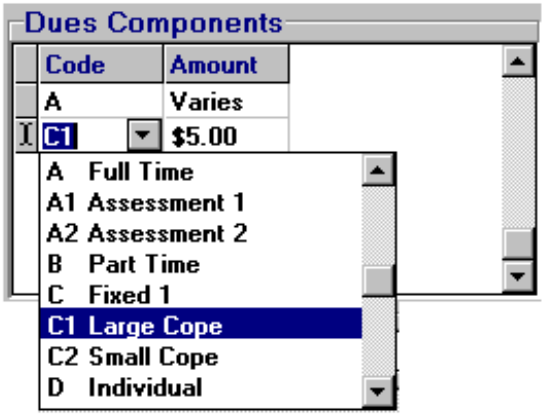


This is the optional Dues Tab for a work location. You will only see this tab if you "Enable Location Based Dues" on the Program Setting Tab of the System Information form.

This tab has the following information:

- ? Dues Method for this location
- ? Local Dues Option
- ? Frequency
- ? Dues Components
- ? Job Title Rates
- ? Last Paid thru date based upon batch processing

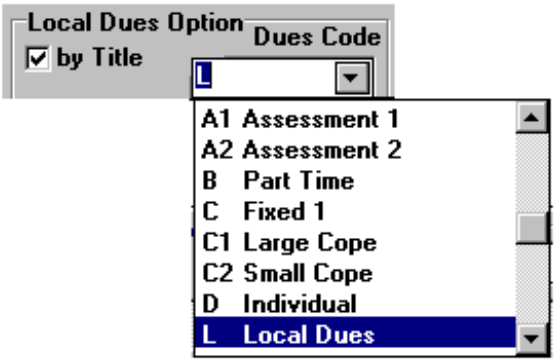
NOTE: The Dues Method determines if member's at this location will be using the default location dues or a unique set of individual dues. Both will have customization options on the member's Financial tab reviewed later.



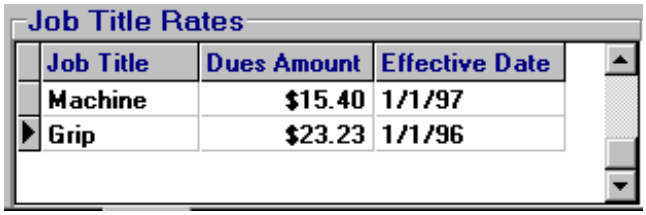
The Dues Component are has room for multiple codes and amounts.

The Dues Codes come from the Dues Formulas, COPE/PAC and Other Payments previously created under Financial codes.

If Local Dues is computed by Job Title, you use this area to set the switch on and to tell the computer which code is Local dues. This is the same Dues Codes used before under Dues Component area.

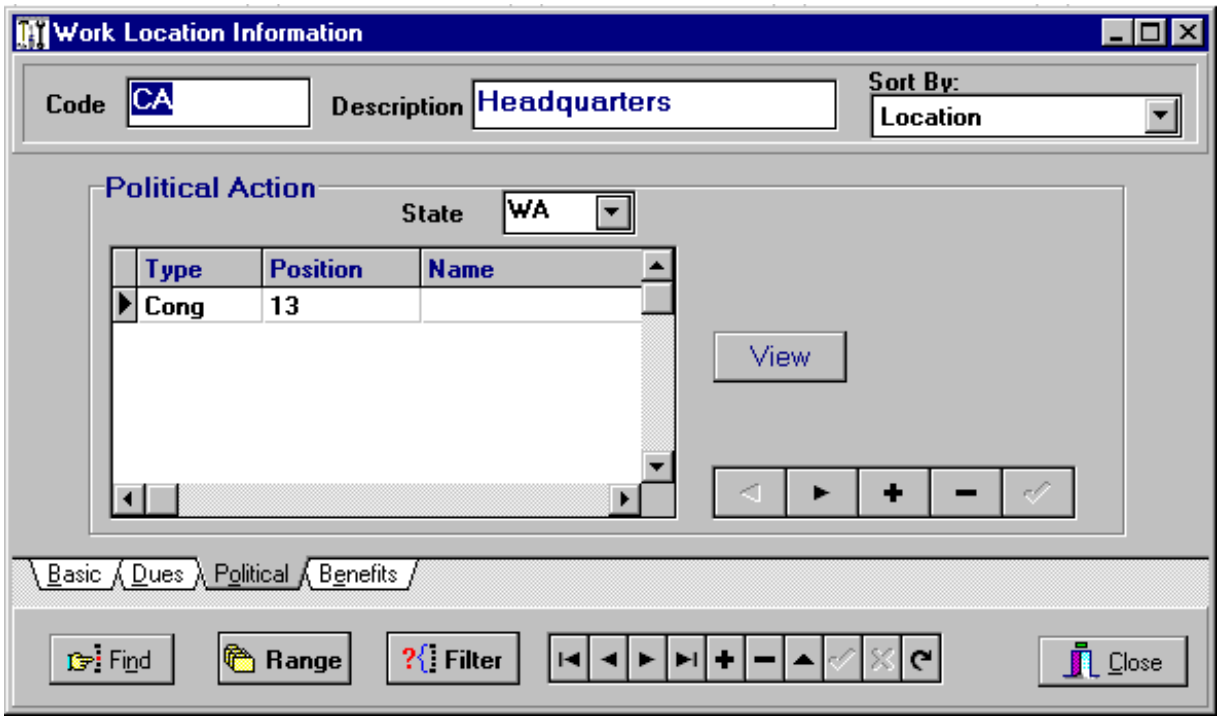


The Job Title Rates grid will be active if the “by Title” is checked off.



This is used to assign a rate and effective date to each Job Title for which you are calculating dues. The Job Titles are those previously established under Title table within the Member Work Tables.

Work Location Tab - POLITICAL



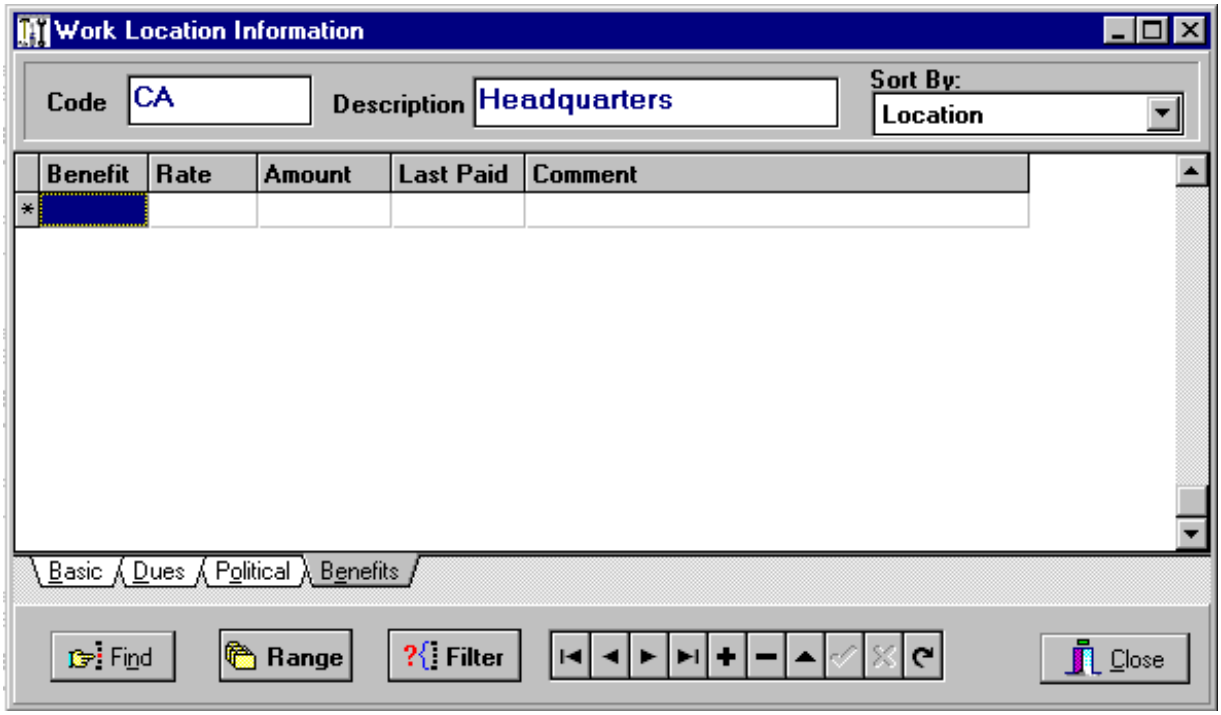
This is the Political Tab for the Work Location.

This tab allows you to enter the Political jurisdictions that apply to this work location. This can be used for selected mailings based upon the work location instead of where a member lives.

This Political Action Group is identical in function to the Political Action Group found on the Member Information Form - Other Tab.

Please see the Member - Other Tab for details on how this functions. This is in Chapter 4.

Work Location Tab - BENEFIT



This is the optional Benefit Tab.

This can be used to record Benefit payments received for this work location.

Chapter 4

MUMS/2000
Membership Information

Member Screen Layout

This is the Member Information Screen.

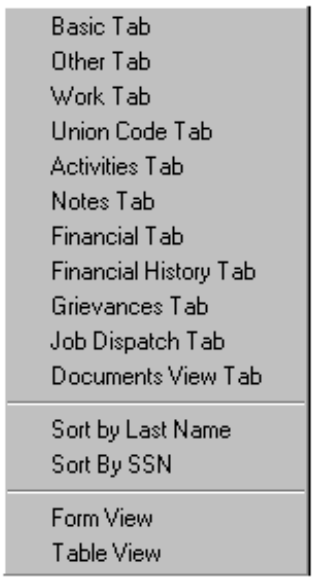
The top shows the SSN, Name, Navigation bar and sort options.

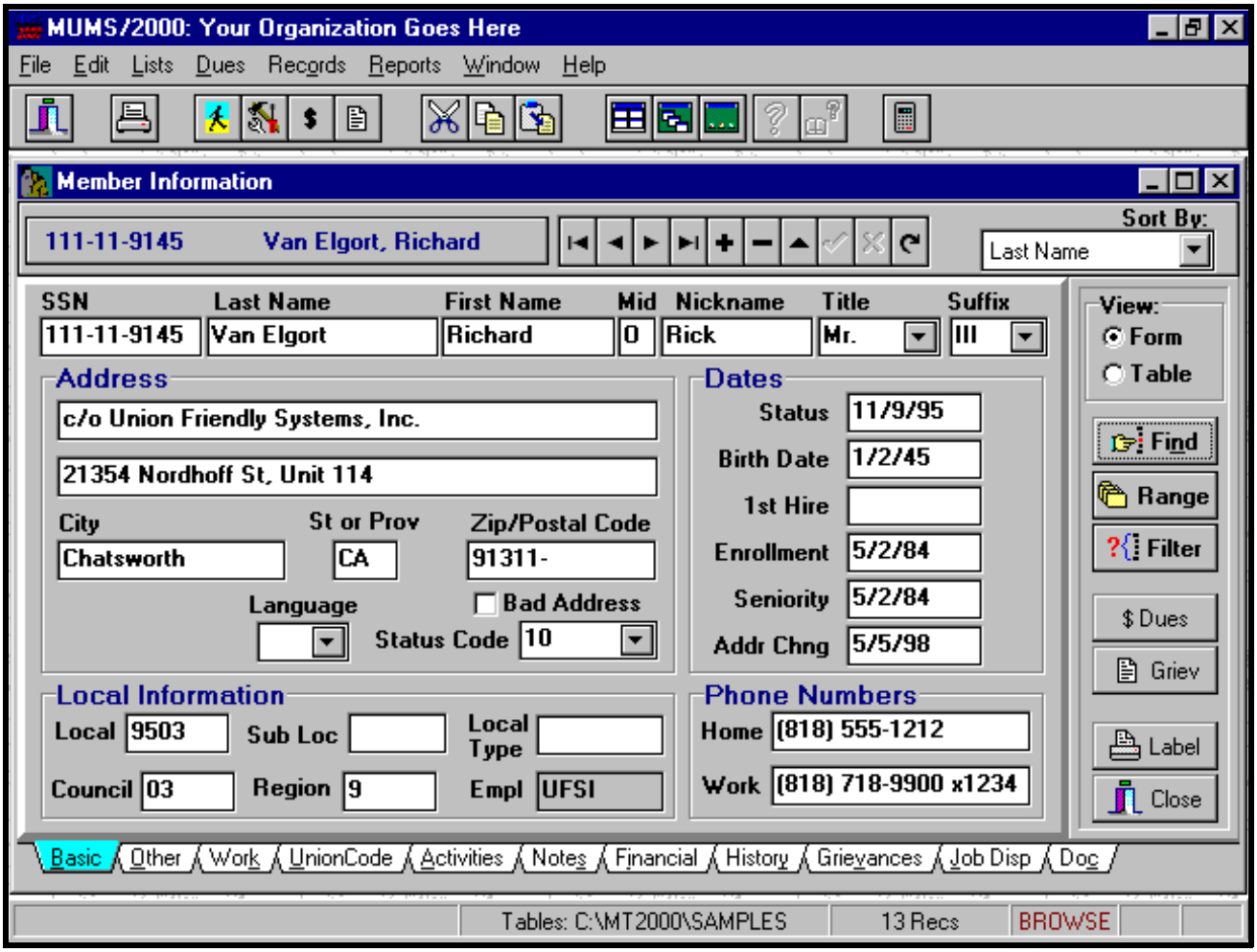
The Side bar allows you to FIND, RANGE and FILTER the member data base.

There are also side bar buttons for DUES, GRIEV and LABEL.

The bottom of the screen shows all of the Member tabs. These will be reviewed one at a time in the following pages.

You can click on the tabs or you can also press the right mouse button for a quick pop-up menu of tabs, two of the popular sorts and the Form vs Table View option.



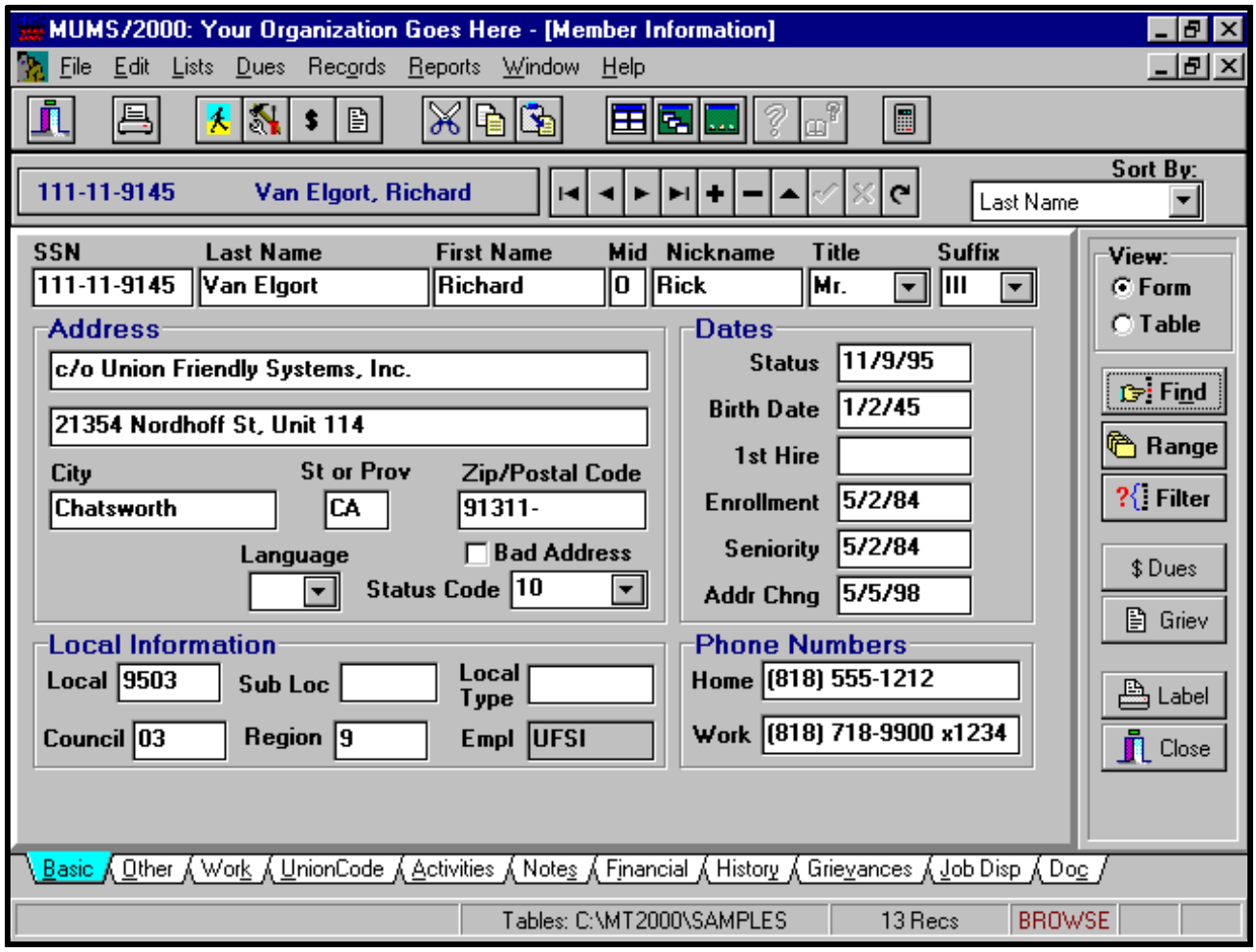


This is the normal appearance of the “Member Information” screen within the MUMS/2000 Standard Window.

This screen can be requested by three methods:

- ? **CTRL+M** key
- ? **Lists|Members** menu item
- ? Members tool bar button...

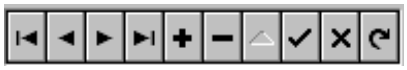
This shows the “Member Information” form or window shown within the “MUMS/2000” standard background that includes at the top the Title Bar, Menu Bar, Tool Bar and at bottom the status bar.



This is an example of the Member's Screen Maximized. The Member's screen now fills the complete window but the MUMS/2000 Menu and Tool bars are still visible. The title bar changes to say MUMS/2000-Member Information. The "Member Information" form can also be minimized. If minimized, the next time you request the member form, it will be re-sized back to it's normal size.

On the "Member Information" form are the standard MUMS/2000 FIND, RANGE and FILTER buttons. See Chapter 8 for more information on FIND & FILTER.

The Navigation bar can be used to go to next or prior record based upon the sort selected. This bar can also be used to Insert or Delete records.

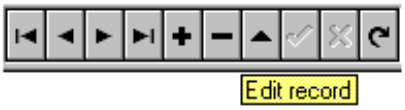


The sort sequence defaults to "Last Name" until you select another.

Add/Edit Member Information

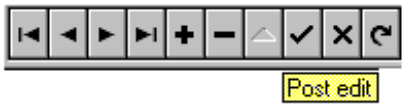
You add a new record by using the “+” key on the navigation bar.

To update information you can click directly into the field you wish to change or press the Edit button(?) on the navigation bar.



Once you have made the changes you can save them by any of the following methods:

- ? Go to another member’s record
- ? Close Member Information Form
- ? Pressing the Post Edit(?) button on the Navigation bar.



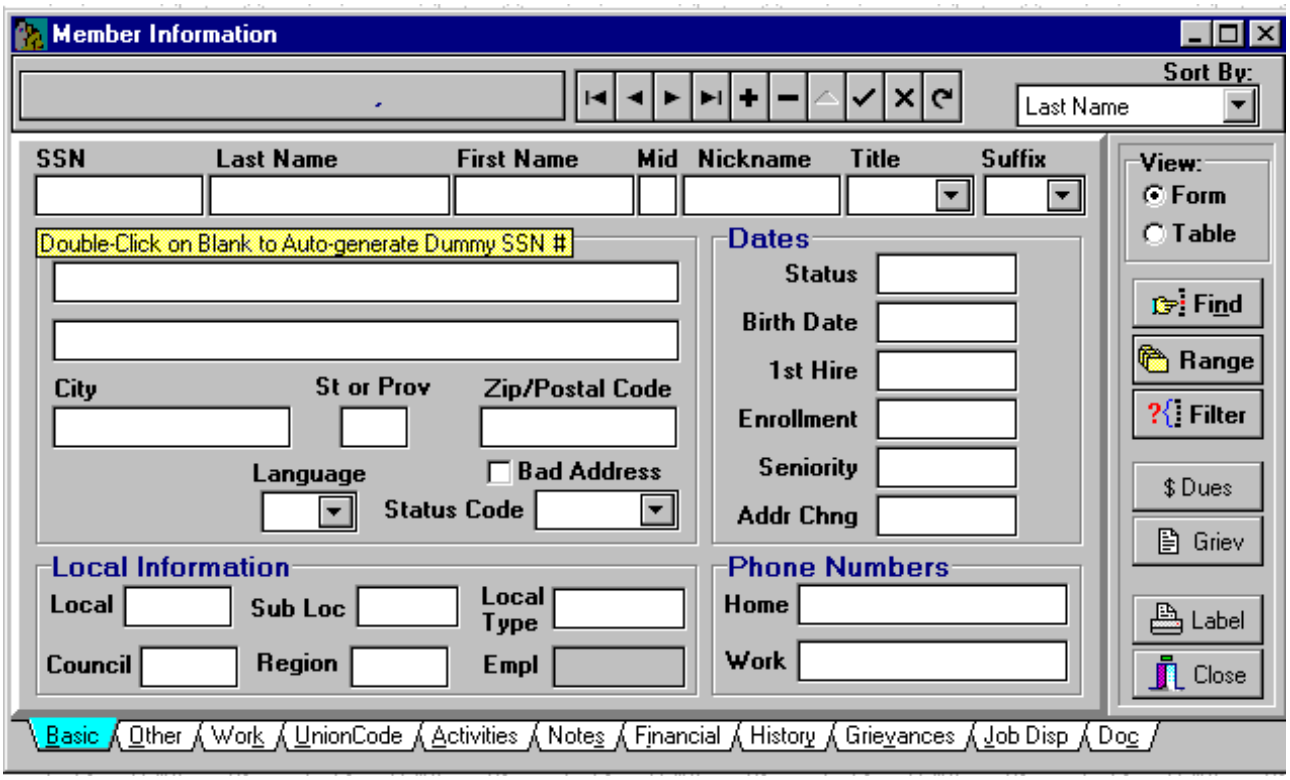
If you wish to cancel the edit, however, you must press the “Cancel Edit” (?) button on the Navigation bar before you do anything else.

WARNING: If you use the “Cancel Edit” key, all pending changes made on this member on any tab will be erased

If you are using a pull-down table or inserting a new item into a grid (list of information), you can often use the ESC key to cancel the change.

If you try to Edit a record that is currently being changed by another user on a network, you will receive this message.

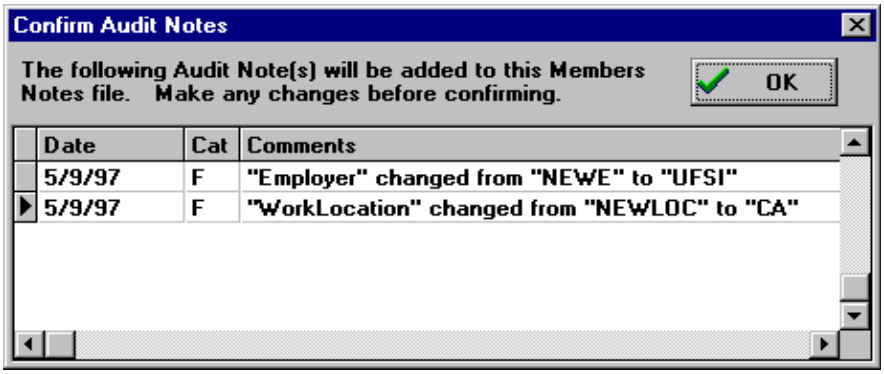
If you use the “+” on the Navigation Bar to “Insert” a new record, you will be presented with a blank member form.



You should immediately enter the SSN# or Double-Click in the blank SSN Field to have the computer insert the next dummy SSN number automatically.

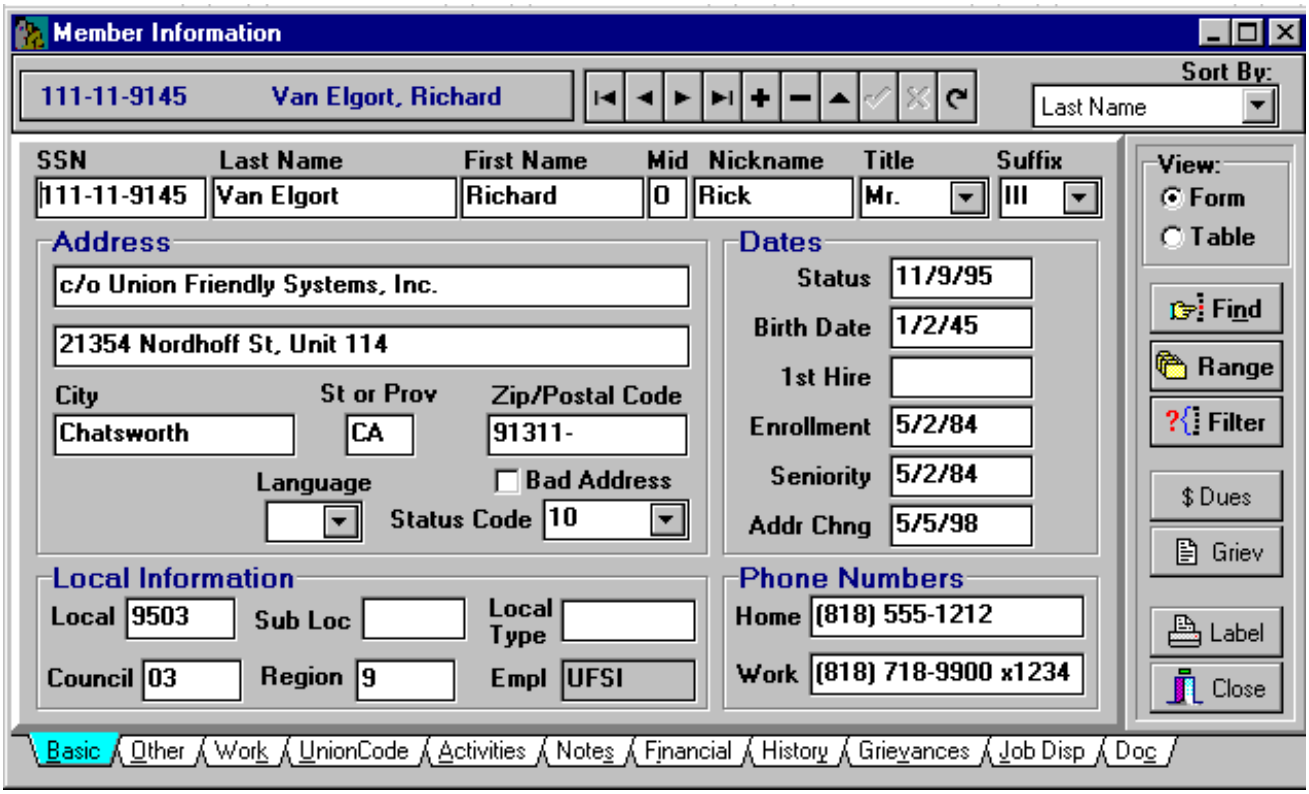
If you try to add an individual whose SSN already exists, the member information form will show you a “Key Violation”. You might also see this if adding other information that required a unique key and you entered a duplicate.

When you change SSN, Status Code, Name, Beneficiary, Local Number, Address, Employer and/or Work Location and you have the System Information Option set for Audit Trail with Verify you will be shown the automatically generated Notes and you edit the note and date.



Member Tab - BASIC

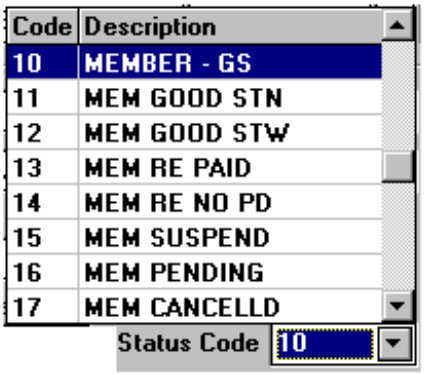
This is the Basic Tab of the Member's Information Screen.



This holds the individuals name and address.

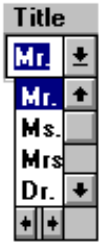
The "Local Information" fields can be used to store Local, Sub Local, Council, Region and/or Local Type.

There is room for both Home and Work Phone with an extension.

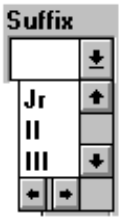


This is the Status Code pull-down. If you change the Status Code, the program will automatically insert today's date into the Status Date field.

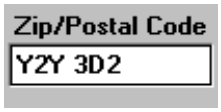
This is the Title pull-down.



This is the Suffix pull-down.



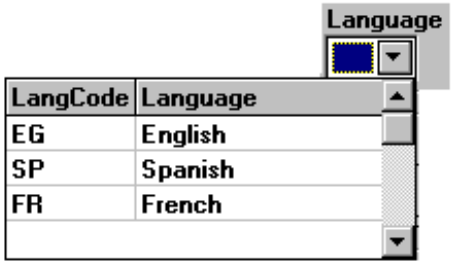
If you enter a Canadian Postal code "Country-Canada" will automatically appear.



There is also a box for you to indicate that you have a bad address.

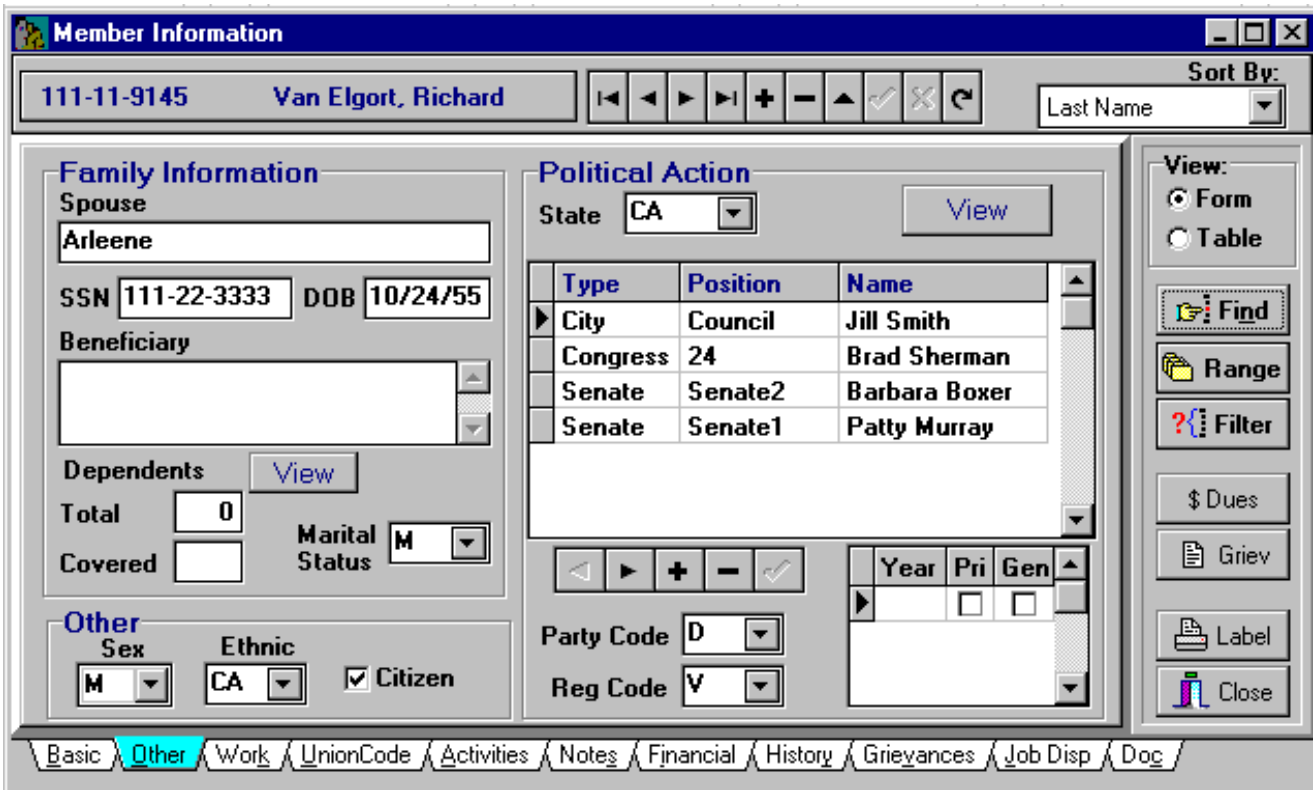
The Language field and Pull-Down are optional and can be disabled from the “Field Settings” tab within System Information Form.

The Employer Code is Displayed within the Local Information Group



An “Addr Chng” date field is shown. This date field is automatically updated when you change an address. You can then use this to print out address changes with the Address Change List Standard Audit Report. Also if you have Audit trail turned-on in the System Information form, the address change will be recorded in an automatic note.

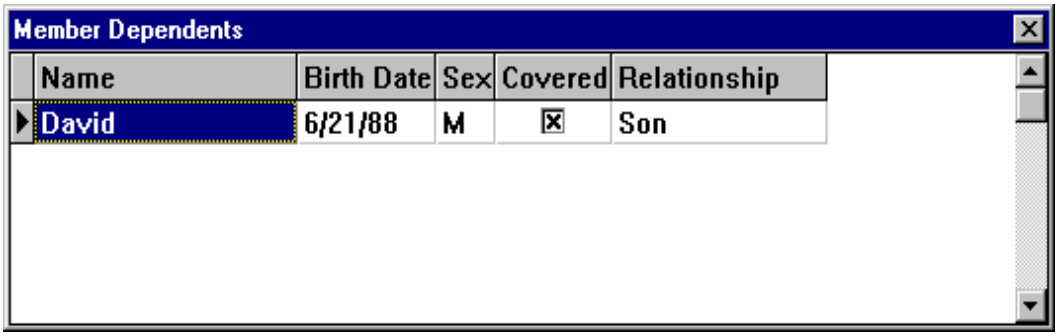
Member Tab - OTHER

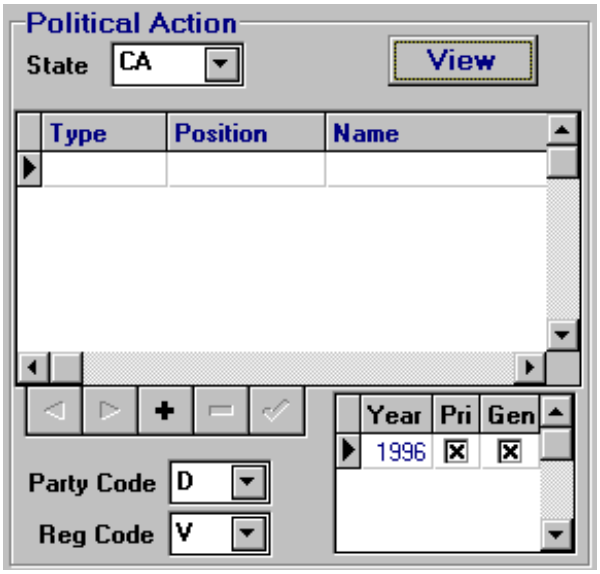


This is the **OTHER** Tab. It is used to hold Family Information, Other Group and Political Action Information.

There are a variety of Pull-Down Tables on this Tab. These are Marital Status, Sex, Ethnic, Party Code and Registration Code. The Citizen checkbox and Ethnic Code are optional and can be disabled from the System Info form.

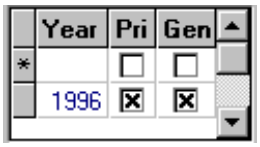
The Beneficiary is a memo field and will hold a long description. You can enter the number of dependents or use the VIEW button. The following is the Dependent view. You can update this grid just like all other grids. The computer will automatically total the number of dependents and number covered when you close.



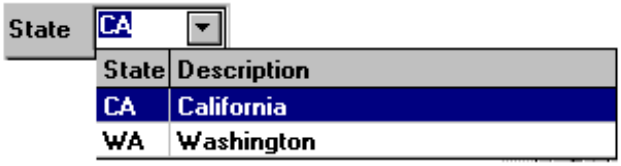


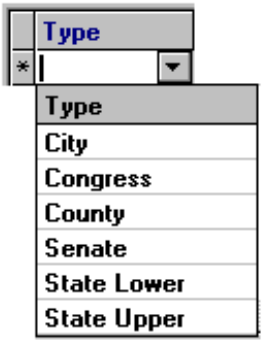
This is the Political Action group with room to hold voting districts, the Party and Registration Code and a small grid to hold Voting History.

The Voting History grid shows an entry for 1996 with a check mark for Primary & General Election. It also shows the results of pressing the INS key after clicking in the grid to add another entry.



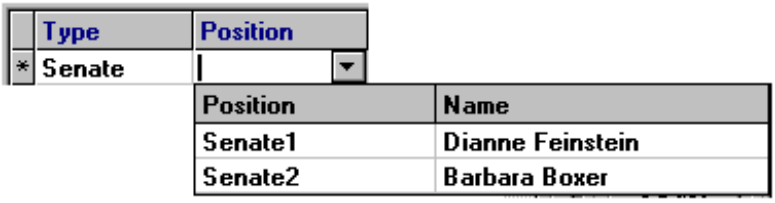
Assigning voting districts start with selecting the correct political state by use of the pull-down.





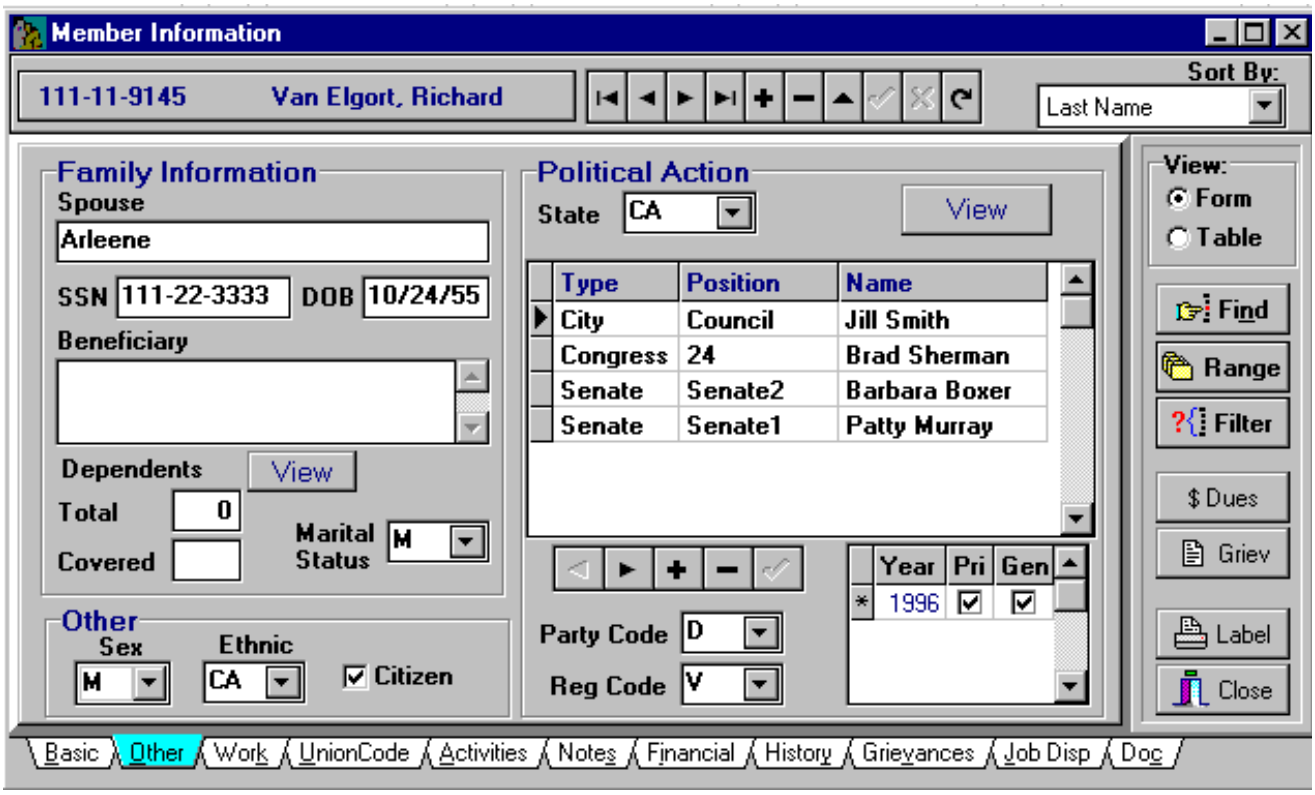
Then you select the TYPE of voting district. The choices will be only those districts actually used within the state you selected.

After you select the Type you select the Position. This might be Senate1, Senate2 or a Congressional District or a local city council seat #. The computer will then insert the name of the representative.



All of the Political codes are established with the table maintenance under **Lists|Code Tables|Political**.

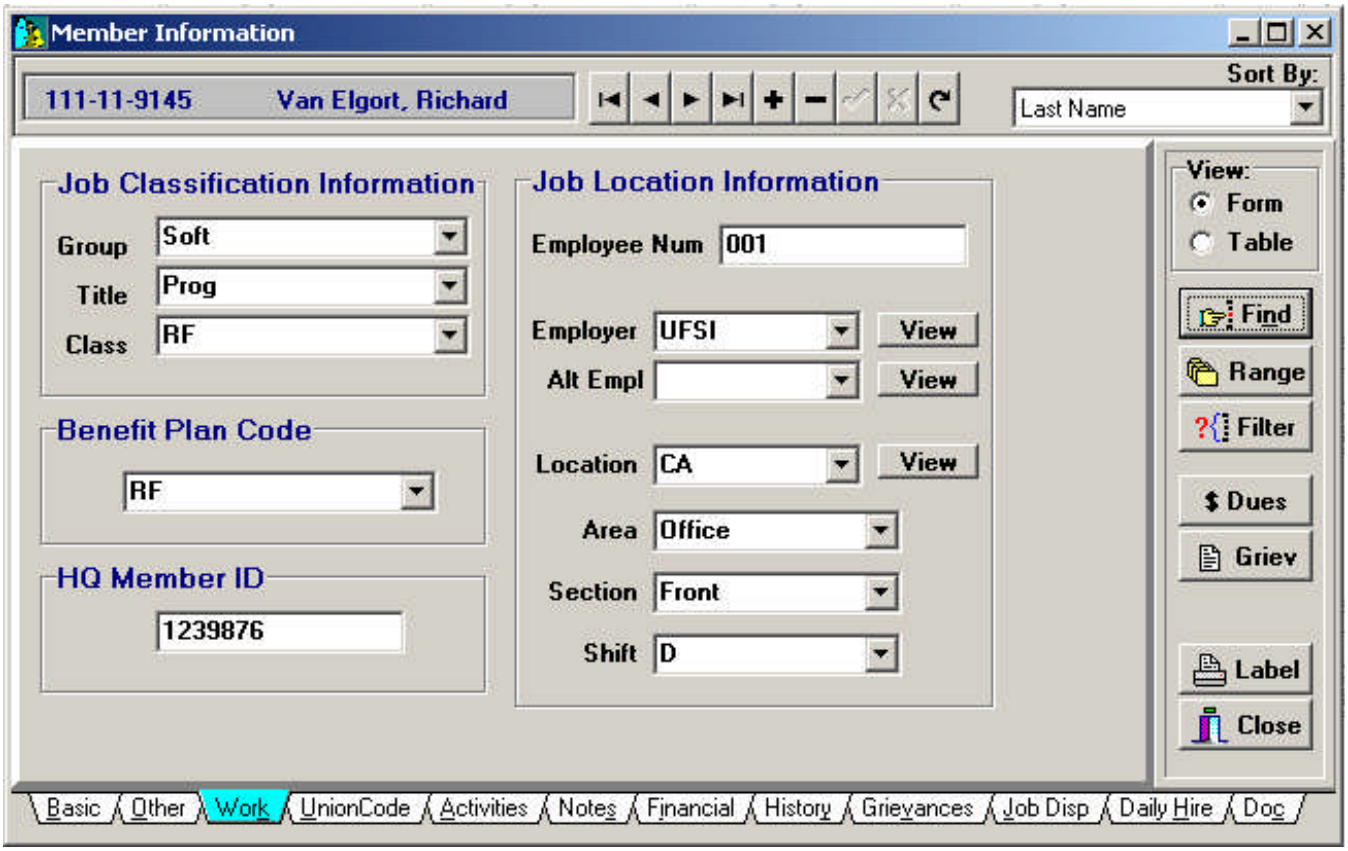
The following shows the results of assigning multiple voting districts.



To view the complete information behind a voting district and the representative, you need to highlight the line you wish to view and press the VIEW button.

This is the result of viewing a voting district entry.

Member Tab -

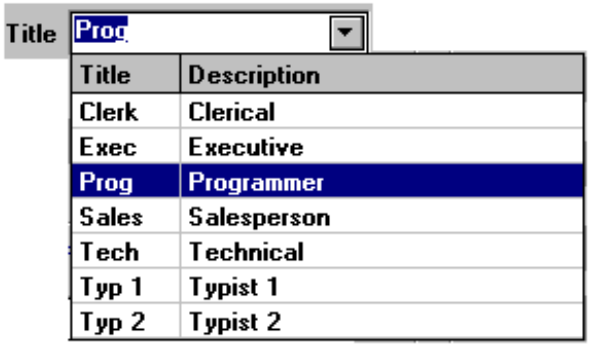


WORK

This is the Work Tab. This screen has room to hold the Employee Number if any along with the Employer and Work Location. Both the Employer and Work Location are pull-down tables but they also have the "View" feature to call up the Employer and/or Work Location Record.

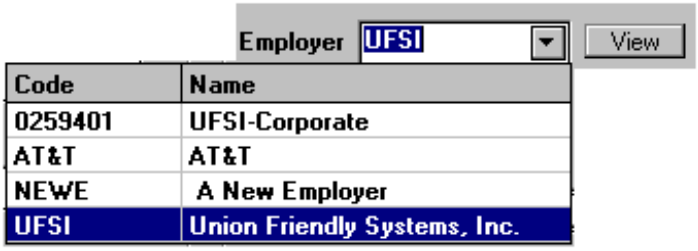
The Area, Section, Shift in the Job Location Group are all pull-downs from the tables you can customize. Job Classification has pull-downs for Group, Title and Class. There is also a pull-down for Benefit Plan Code.

This is an example of one of these pull-downs. This is the Title Code field.

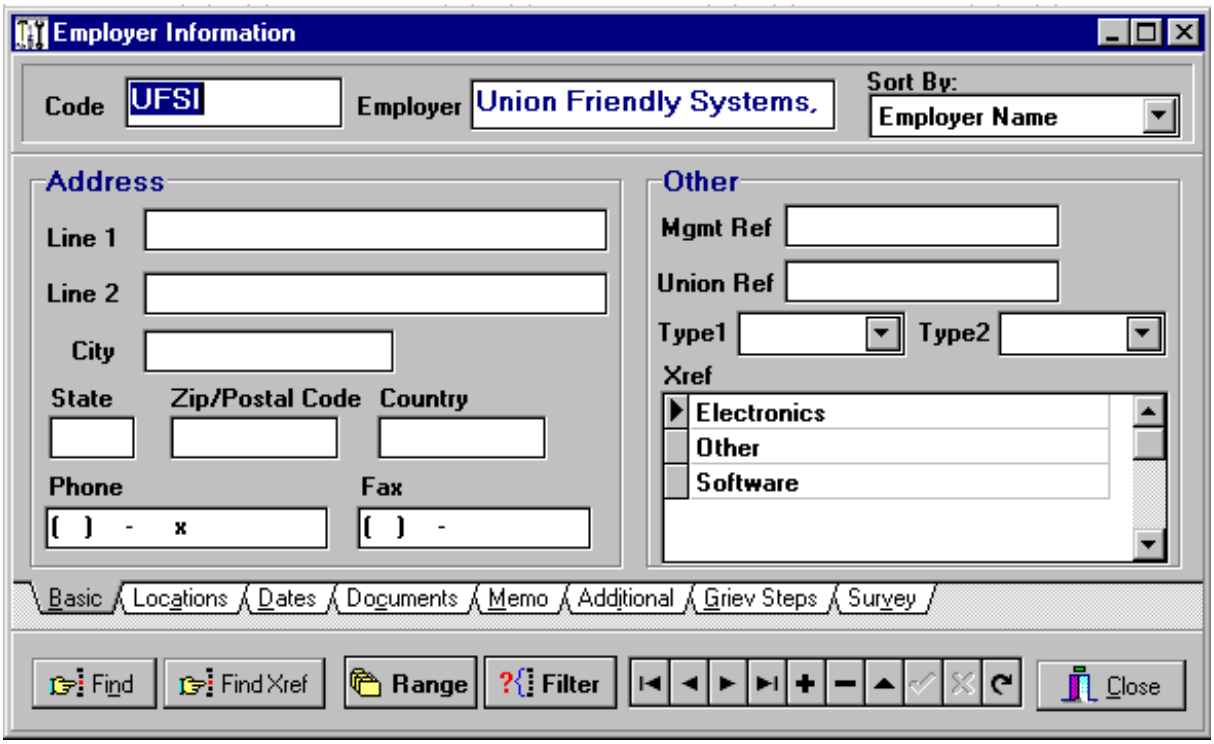


The “Alt Empl” field has been added to keep a 2nd employer on a members information form. This can be used while creating an automatic batch of dues.

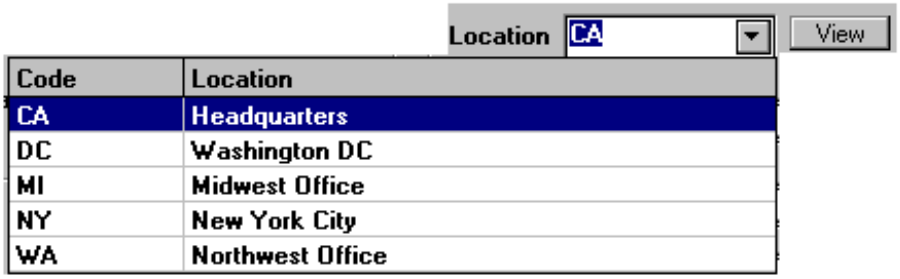
The Employer field is a pull-down with a VIEW button.



This is the pull-down.



If you press the VIEW button on the program will automatically bring up the Employer Information form and position it on the correct Employer record.



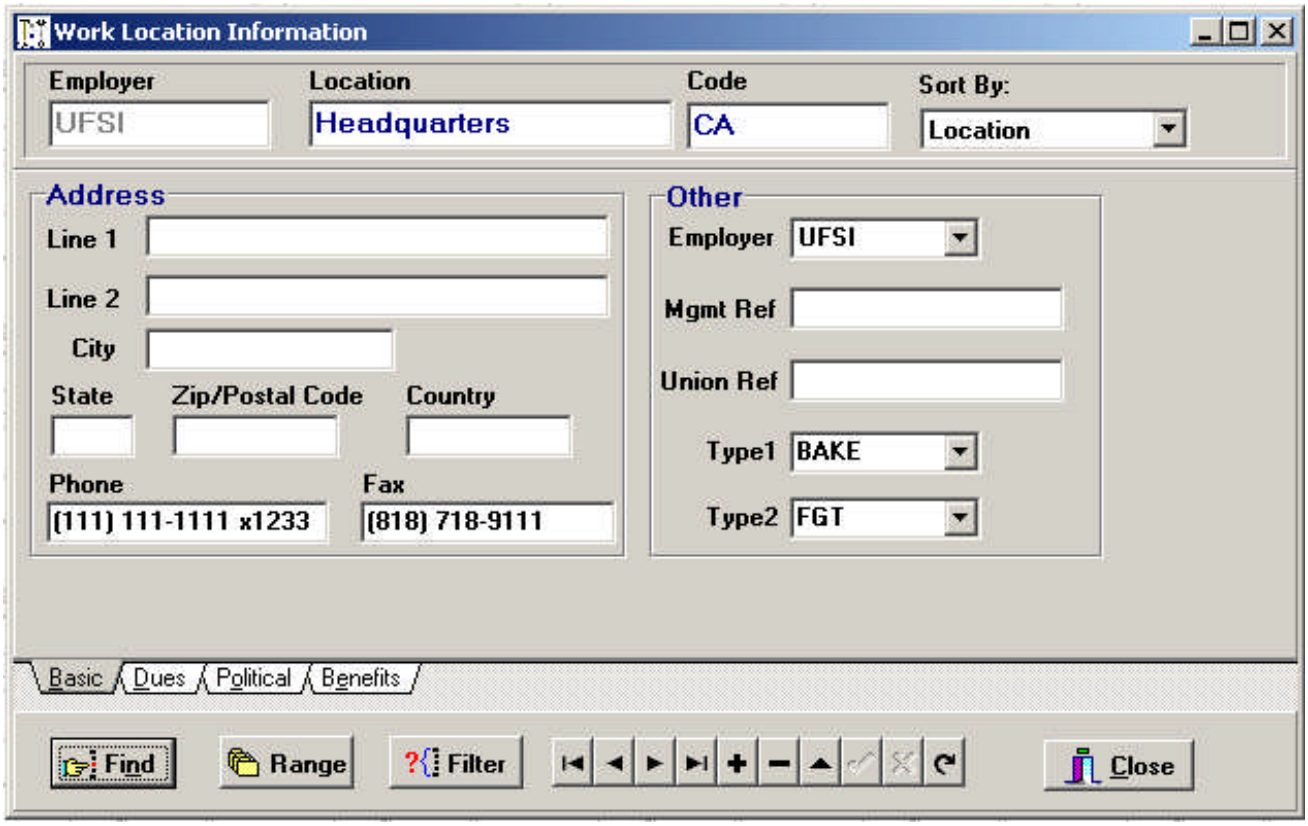
This the result of pressing the "View" button on the Employer. From the Employer record you can also review all the valid locations and click to see any of those locations. Please see the section on Employer and Work Location records described earlier for more information.

Please Note: If you change the Employer, the program will automatically clear the Work Location field. Be sure to assign a work location after the Employer change.

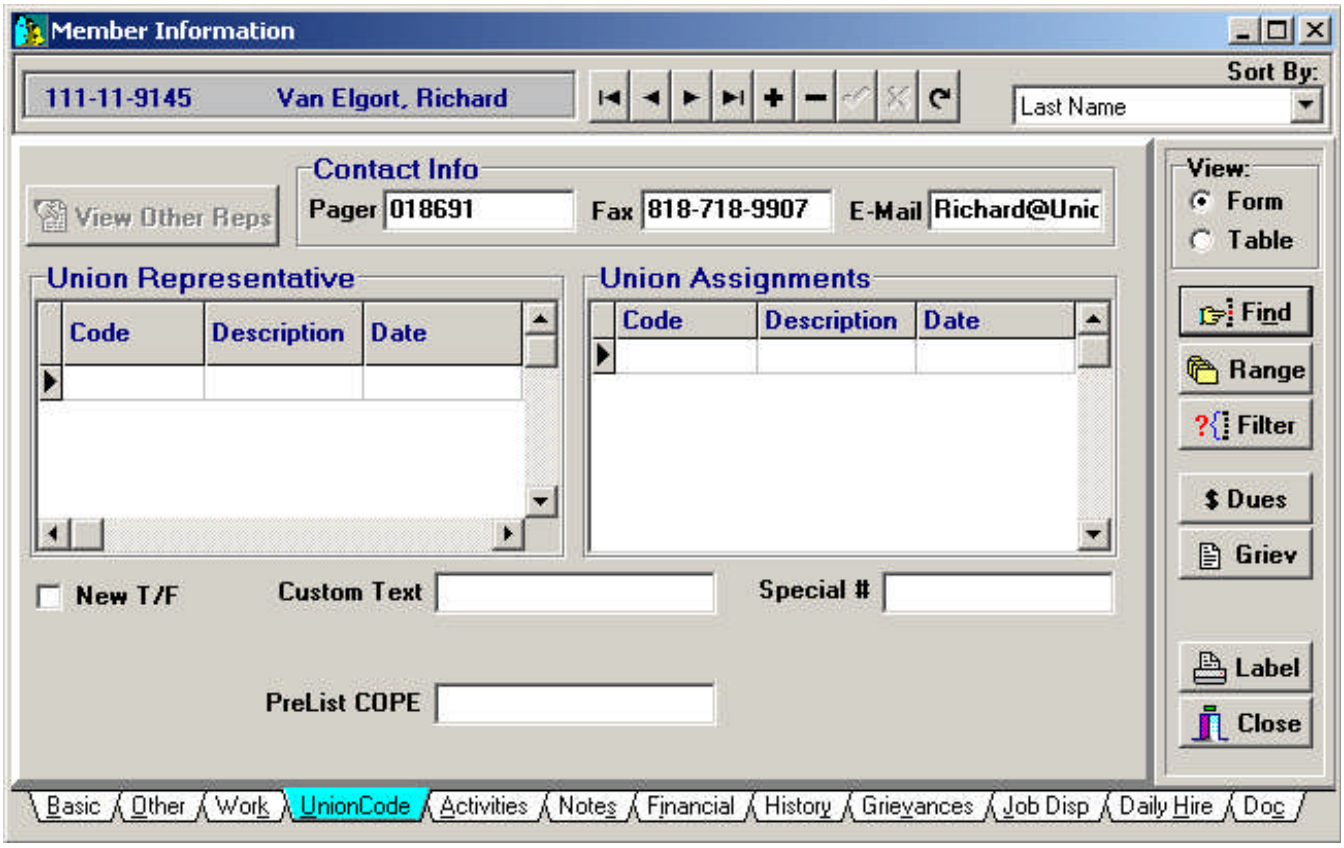
This is the Work Location pull-down with VIEW button.

This is the result of pressing the VIEW button.

The View of Employer and Work Location allow you to update this information if you need to. When you CLOSE from these, you are returned to the member information form.

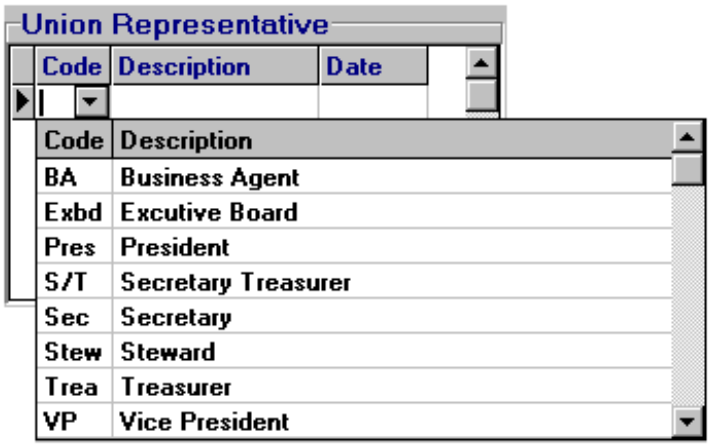


Member Tab - UNION CODE



This is the Union Code Tab.

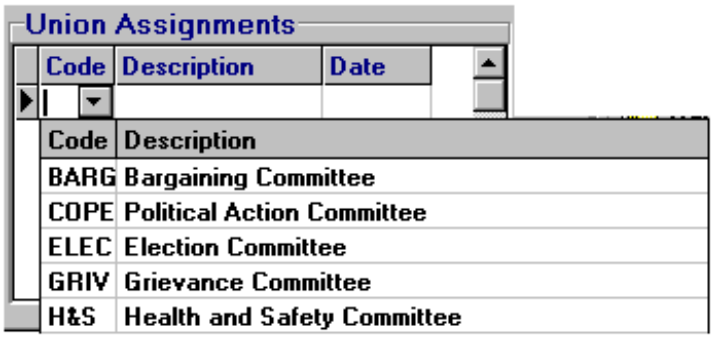
On this screen you can enter an individuals Pager and Fax number and an number of Union Representative Codes and Union Assignment Codes. These Codes have separate unique tables you customize.



Both the Union Representative and Union Assignments grids work the same way.

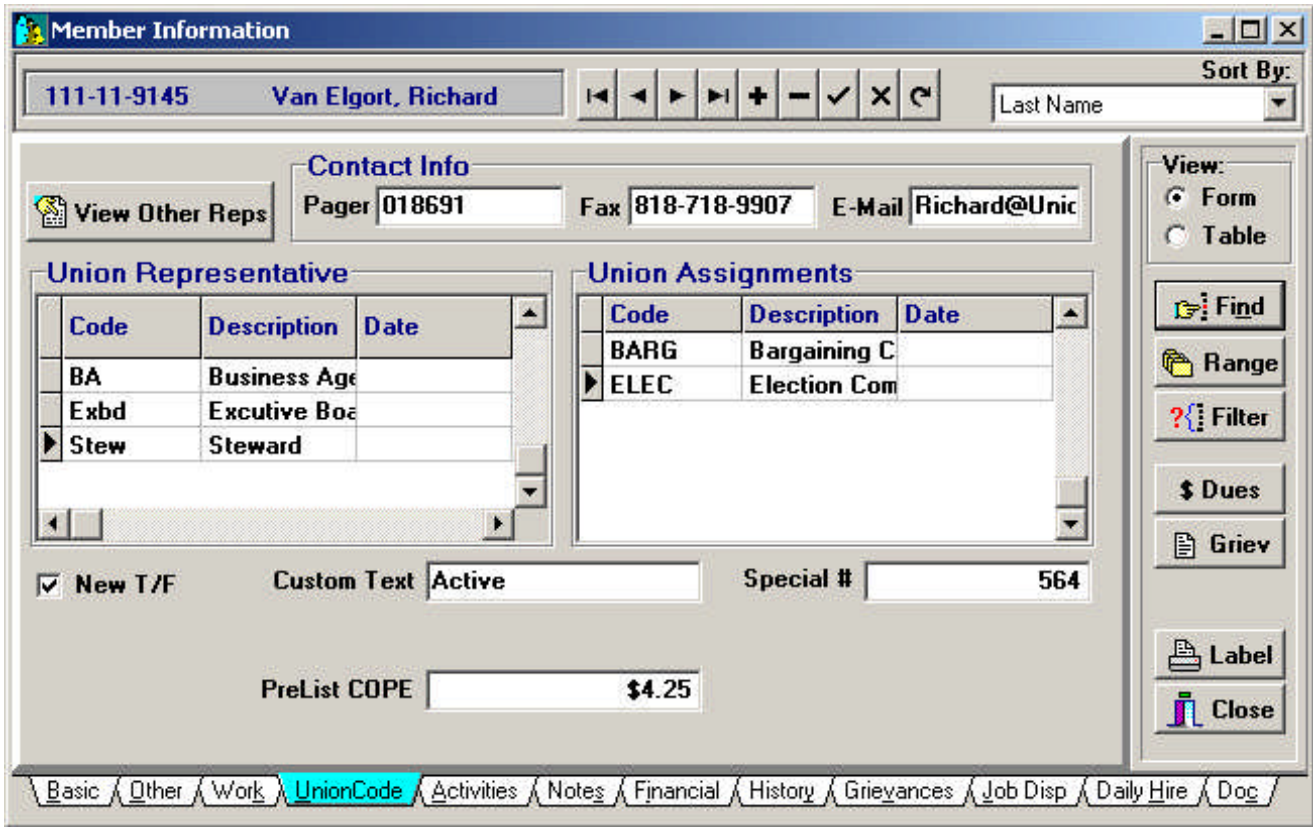
You click into the Code area and select the code you wish. If you press the TAB key after entering a code the computer will open up another line. If you wish to cancel a new change, press the ESC. You can delete existing items with CTRL-DEL.

This shows the Union Assignments grid.

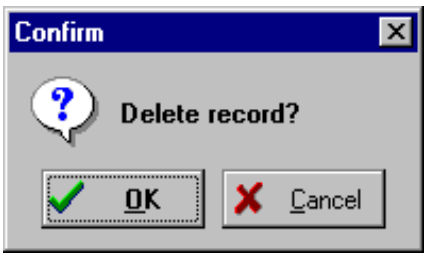


You can also add a Date next to the Representative or Assignment Code. This can be used as an effective or expiration date.

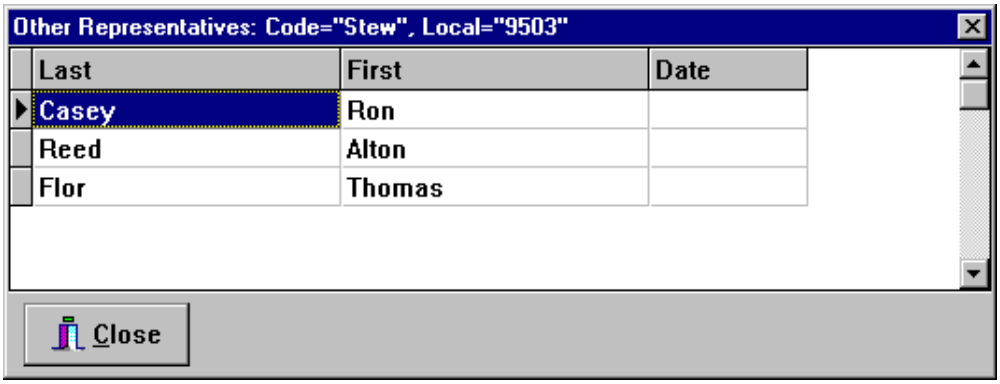
The following shows the screen with several items filled in.

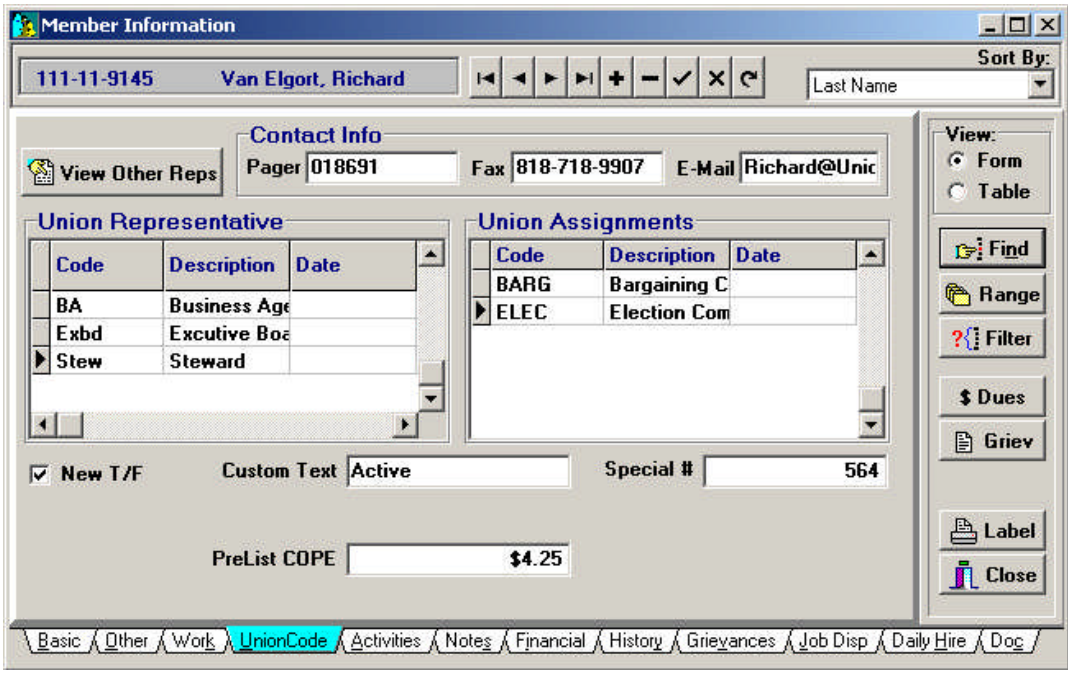


If you highlight an item and press the CTRL-DEL key the program will ask you to confirm the deletion of the entry.



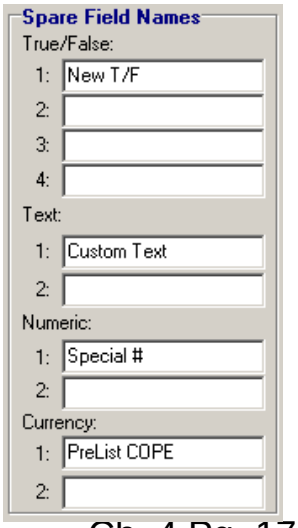
If you highlight a union rep code and press the VIEW OTHER REPS button you will get a display of those within the same local with the same codes. You can then double click on an individual and proceed to their UnionCode tab to update if needed. This is useful to manage who has what code and allows you to know who to remove after you have done a new addition of a code.



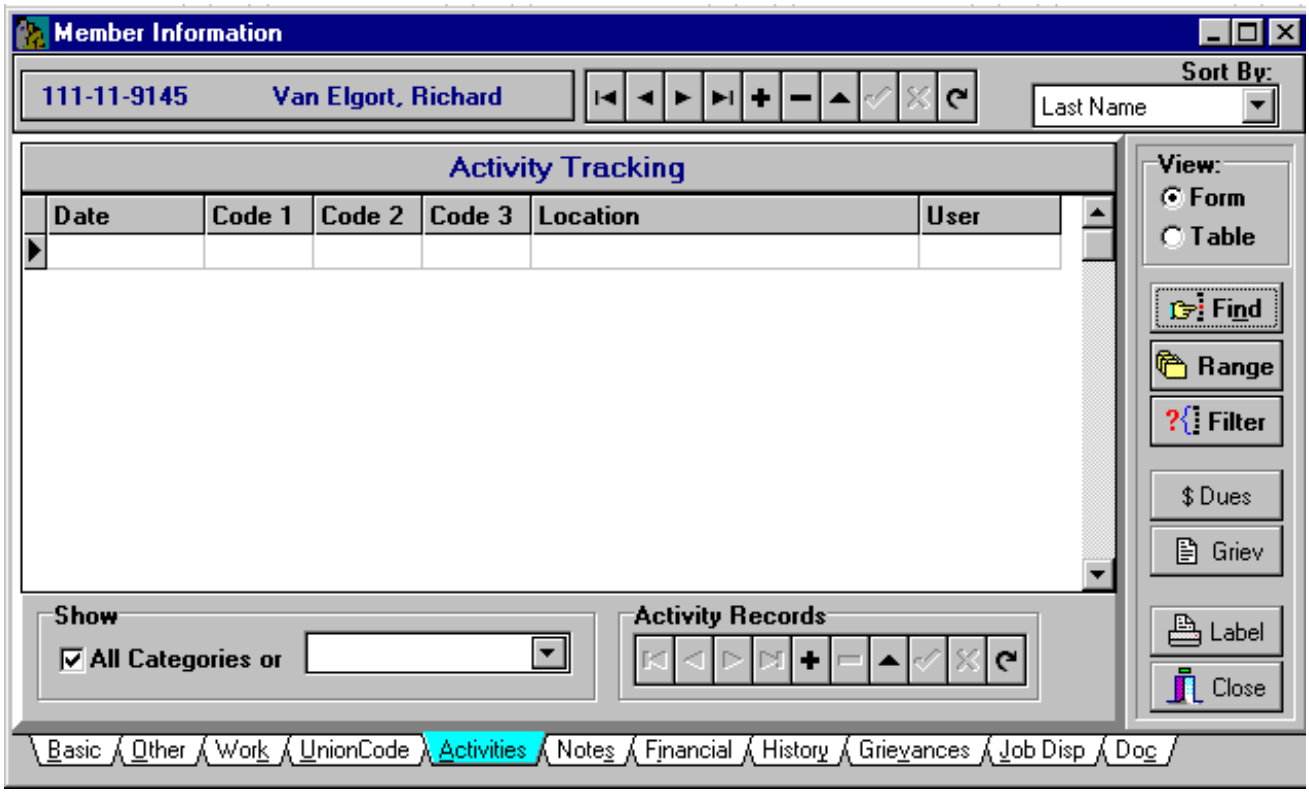


At the bottom of the Union Code tab is the area where the custom fields appear.

There is room for four True/False check boxes, two text, two numeric fields and two currency fields. In the example shown here we see one of each. Please note that these fields are created in System Information by inserting a custom field name as shown here.

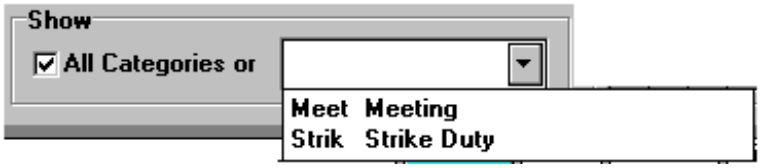


Member Tab - ACTIVITIES



This is the Activity Tab. This can be used to track union activities for this member. There is a three level category scheme on activities. You can treat this as a category, sub-category and level of participation or any three levels you wish. The categories and relationships are maintained under the Member Union Codes under the **Lists|Code Tables** menu item.

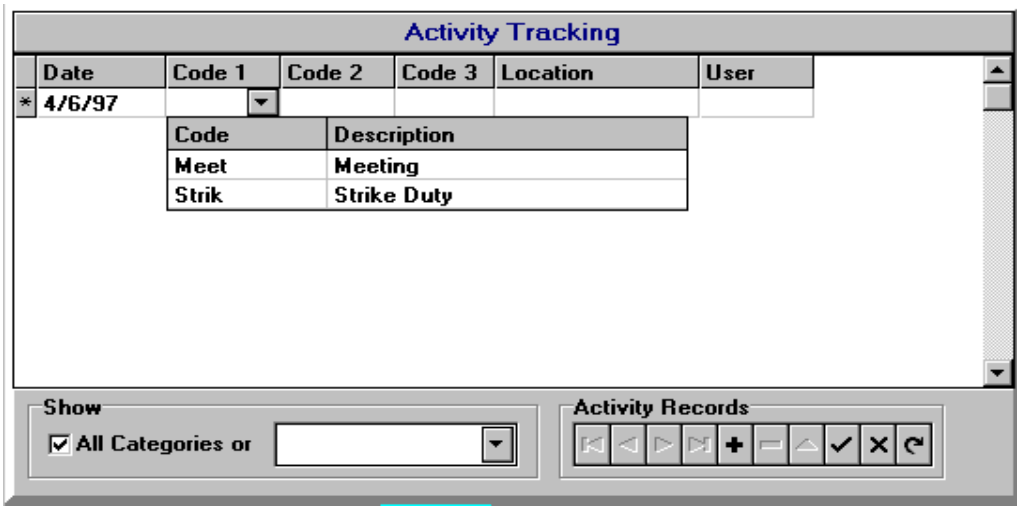
You can display all categories or select one of the categories that you have customized.



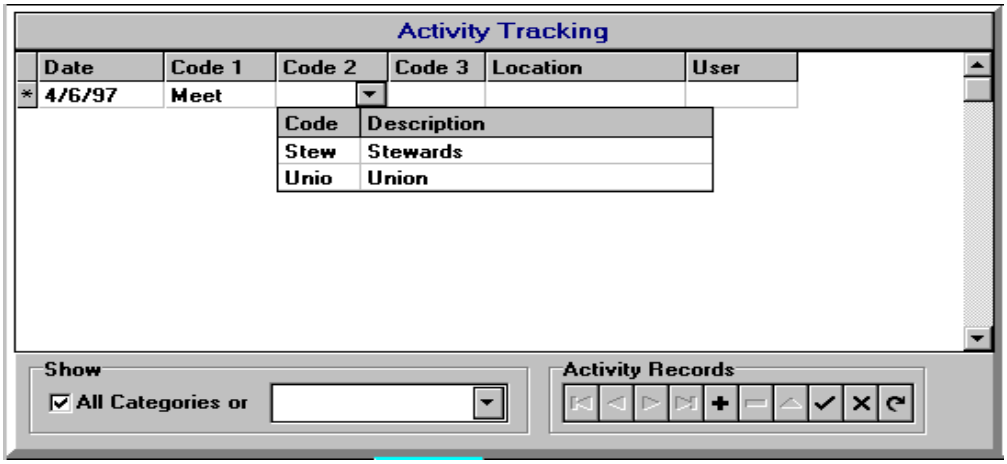
When you add an activity, you must use the three codes in sequence. In other words you cannot use a sub-category (code 2) without first assigning a major category (code 1) first. You do not have to use all three levels even if you have all three level of codes defined. This means you could just insert a Meeting code without being forced to say which kind of meeting.

If you press the "+" key on the Activity Navigation bar you can add a new activity. The program will insert today's date and you user-name.

This shows the pull-down for the main category.

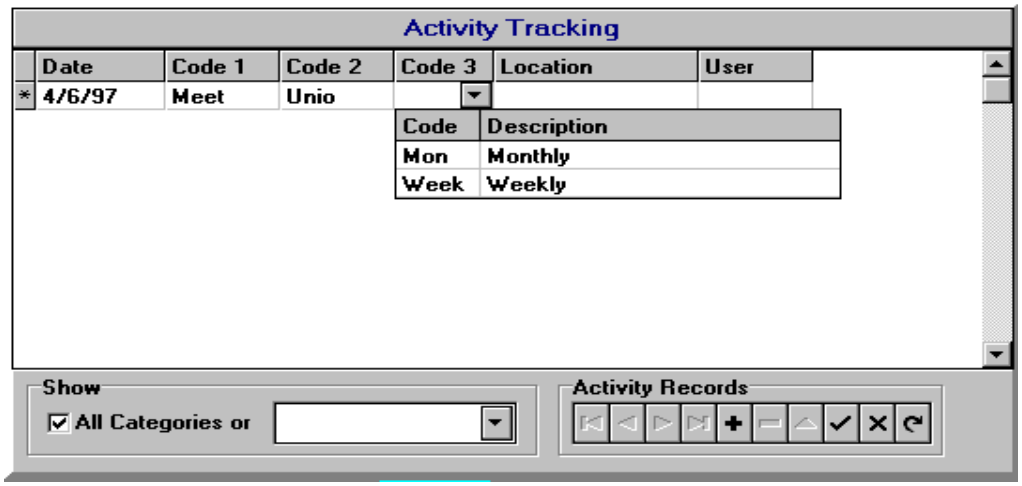


Once the main category is assigned you now have the pull-down for the sub-category.

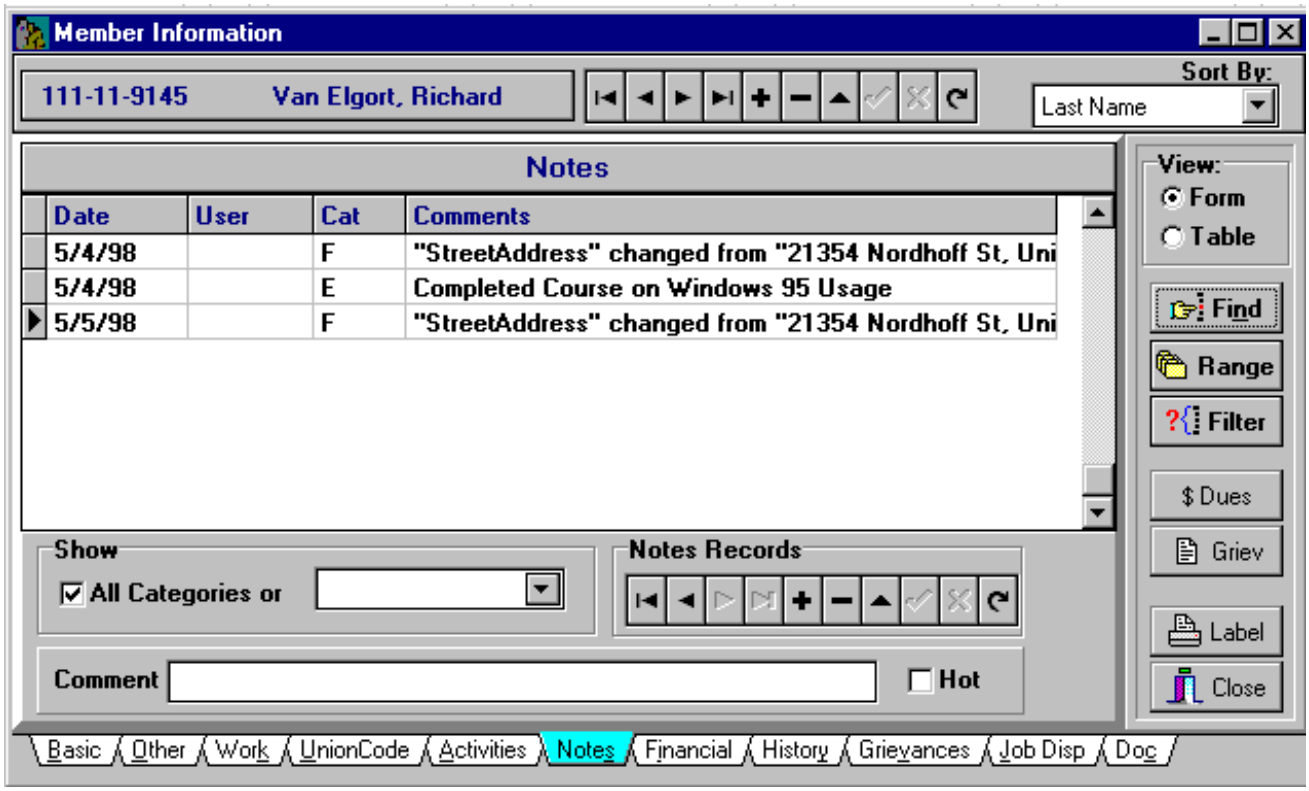


Once the sub-category is assigned you have the pull-down for the valid third code or level.

You can then enter the optional location of the event if you wish.

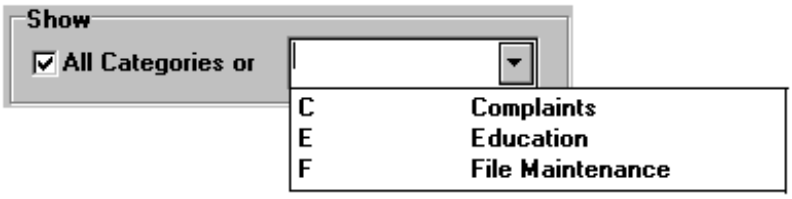


Member Tab - NOTES



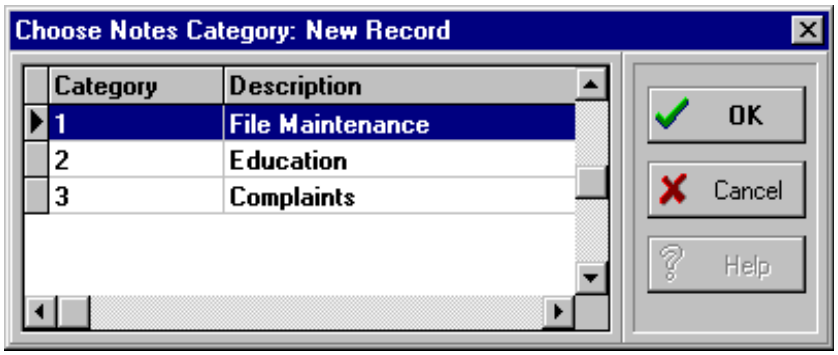
This is the Notes Tab. This can be used to create notes for this member. You can display all categories or select one of the categories that you have customized. If your system is setup for Audit Trail within the System Information Form, then the above note screen will be used to store the changed information. The program will create a note if you change the SSN, Status, Name, Beneficiary, Employer or Work Location.

You can show all categories or select the category you wish to display. The computer will position you at the most recent note with older items above them.



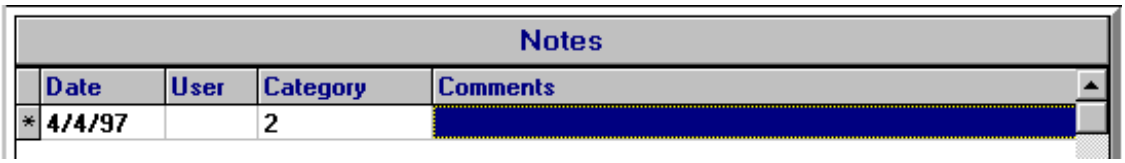
This screen is also used to create the HOT Comment feature of MUMS/2000.

If you press the "+" key on the Notes Navigation bar you can add a new activity and will be displayed the "Choose Category" window. These are the codes that you established. You might want to setup letters instead of number codes. For example, you can use “F” for File Maintenance. These codes are setup under LISTS.

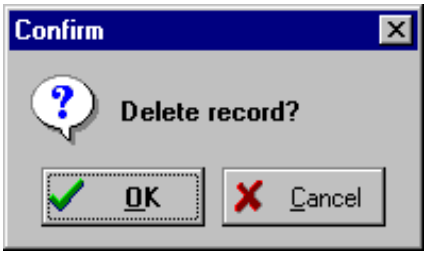


Once selected the program will fill in with today's date and your user-name.

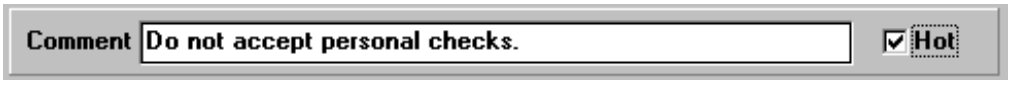
Then you can enter your comment to complete the entry.



If you highlight an entry and press the "-" key on the Notes navigation bar, you will be prompted to confirm deletion.

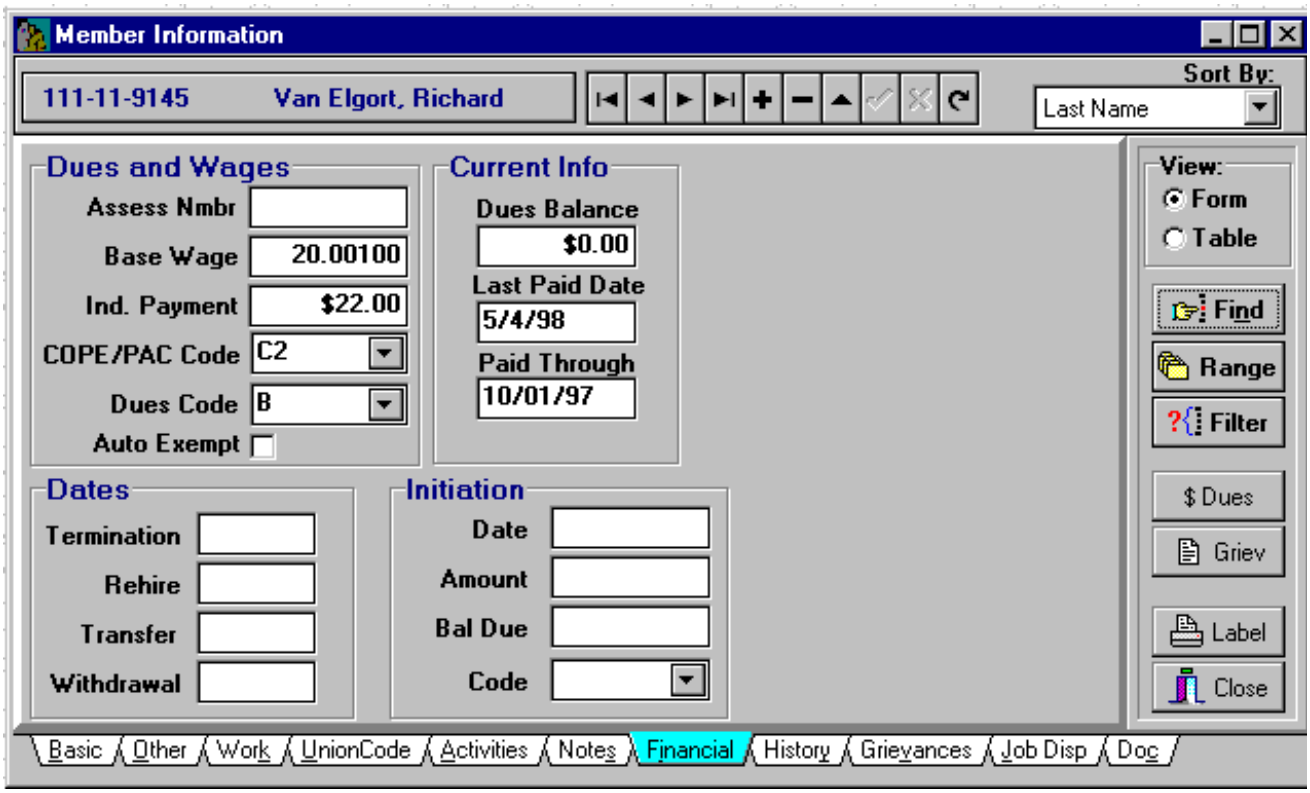


You can use the Comment Box at the bottom of the screen to put in a Hot Comment.
If you click and check the "Hot" indicator on the right, then retrieve this Member's record or highlight on Table View, a Warning will be issued and will display your custom comment.



You must then "OK" or acknowledge the message before you can proceed. If you wish to hold a message without the forced acknowledgment, then do not check it as "Hot".

Member Tab - FINANCIAL



This is the **FINANCIAL** Tab.

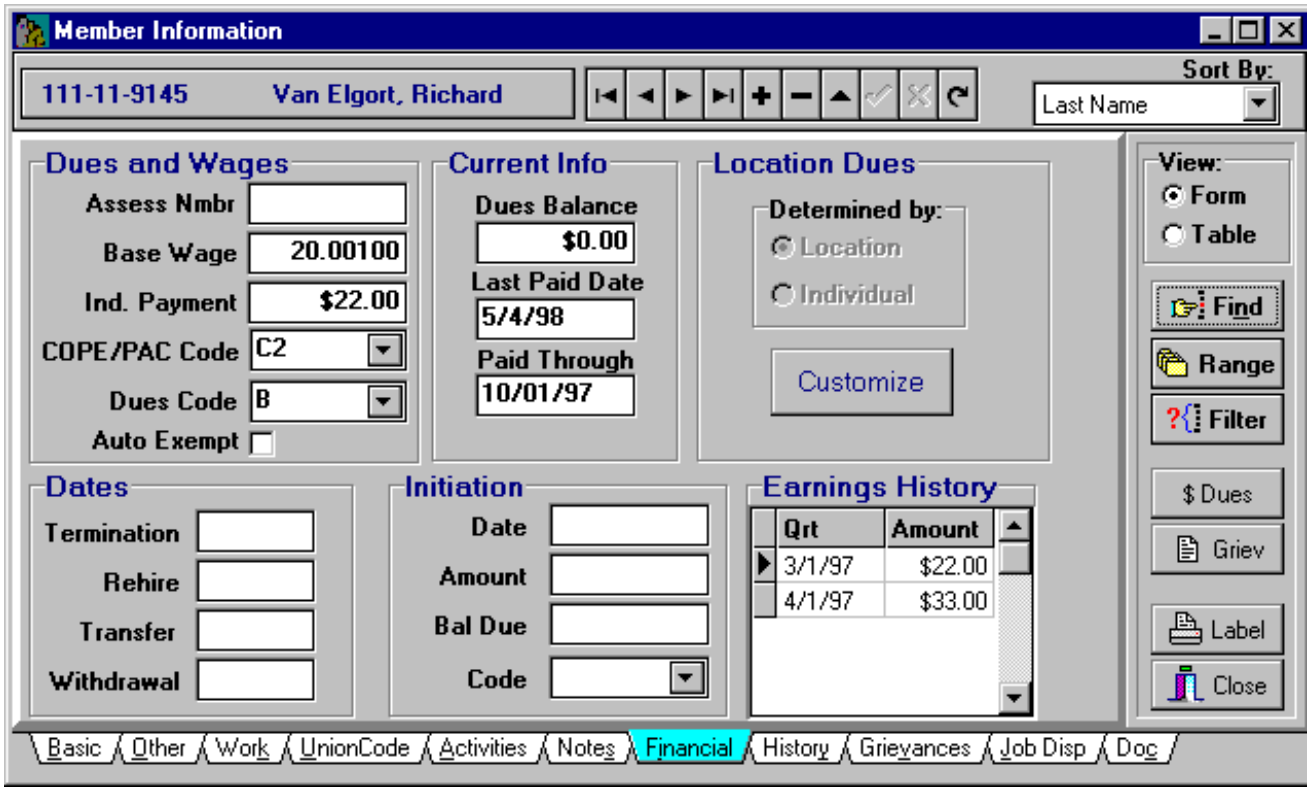
This can used to hold a variety of Financial Information. The Seniority Date is the same as that on the Basic Tab.

The Base Wage and Individual Payment Fields are used in conjunction with the Dues Code to generate Batches of Dues Transactions.

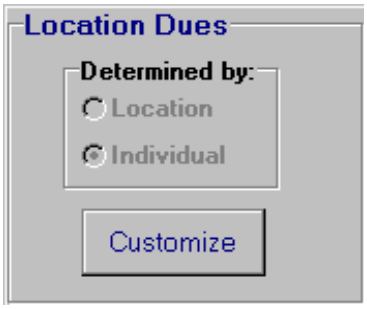
The above screen shows the tab with the Earnings and Location Base Dues options within System Information being disenabled.

The Dues and COPE/PAC codes are pull-downs linked to the Dues codes you previously established. The “Dues and Wages” fields are used for dues calculation if you are not setup for Location Based Dues.

The “Auto Exempt” field is used to indicate that an individual is to be skipped when doing an “Auto-Create” batch of deductions. This can be used to mark those individuals within an employer who are not on checkoff.



The above Financial Tab shows the Earnings History group that holds the quarterly earnings figures. If the Earnings History is turned off in System Information (Update/Display Earnings), that area will be blank. Earnings are entered via the Cash Receipt Processing. These earnings are also displayed when you request "History" during the Cash Receipt Processing. Both of these features are described in Chapter 5.

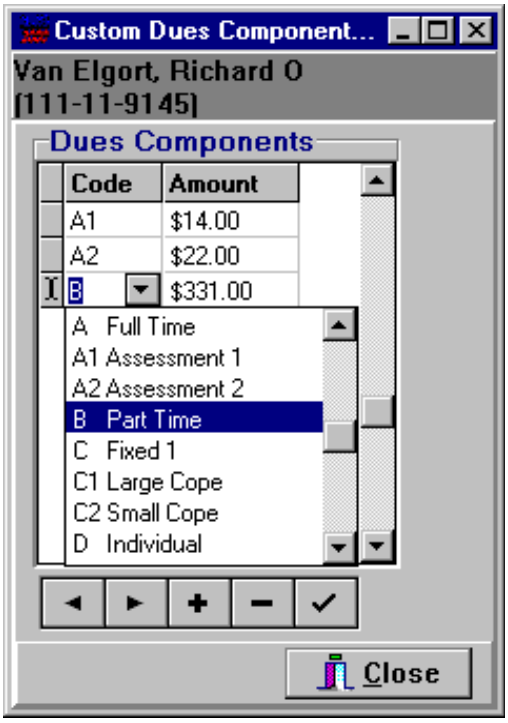


The above also shows the Location Dues Group that is activated by the Location Based Dues option in the System Information form. If the switch is off the area will be blank.

The Location/Individual indicator is based upon the Work Location. When using Location Based Dues, a Work Location is set to either Individual or Location Dues Method.

The Customize button is used to setup unique dues for this individual even if dues is work location based. If you press the Customize button and the member's work location is not marked Individual or Location based, you will get this message.

This is the Customize windows if dues are individual based.

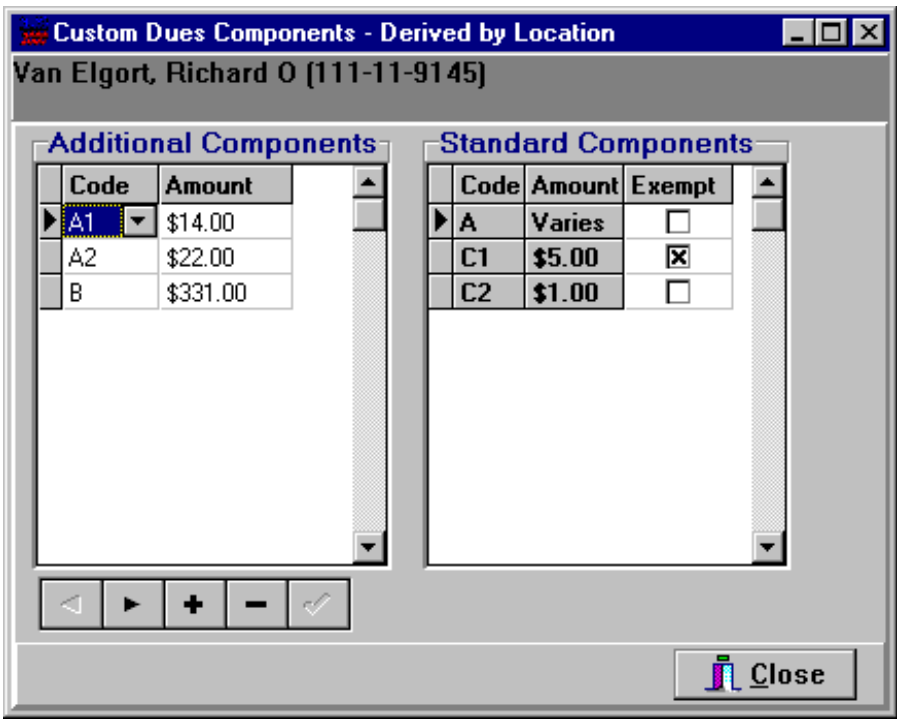


On this window you can assign Dues Codes from a pull-down table and enter an amount.

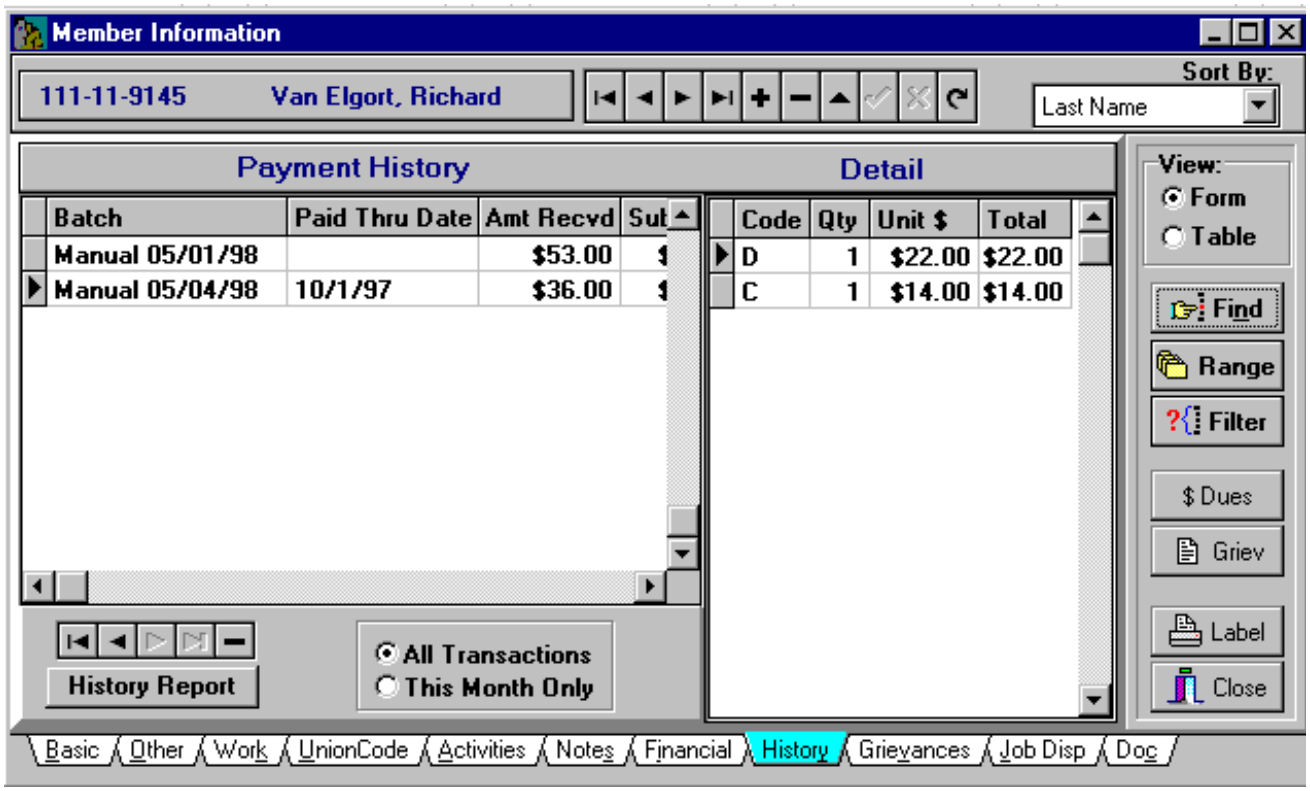
This is the Custom Dues Component for Location Dues Method members:

This screen lets you setup additional dues components besides the standard ones that are location based.

You can also exempt this individual from the standard location based deductions by using the check box under Exempt.



Member Tab - HISTORY



This is the **HISTORY** Tab.

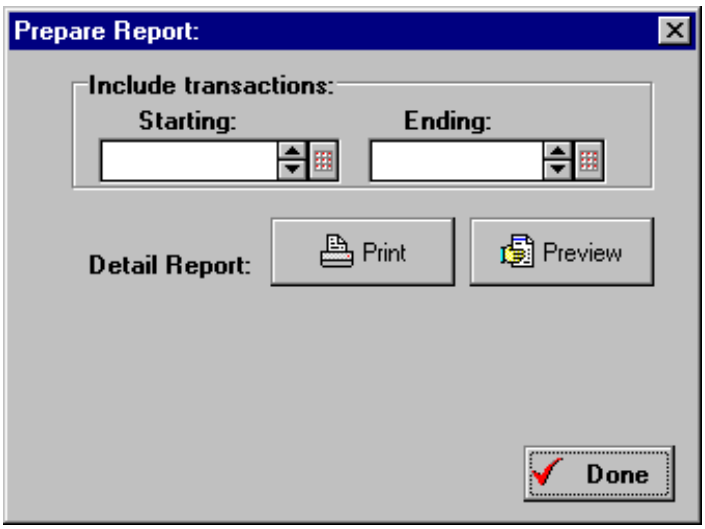
This screen is used to review all payments received on the individual.

You can use the Scroll bars or Navigation bar to change the view of the payments. You can also switch from “All Transactions” to “This Month Only”.

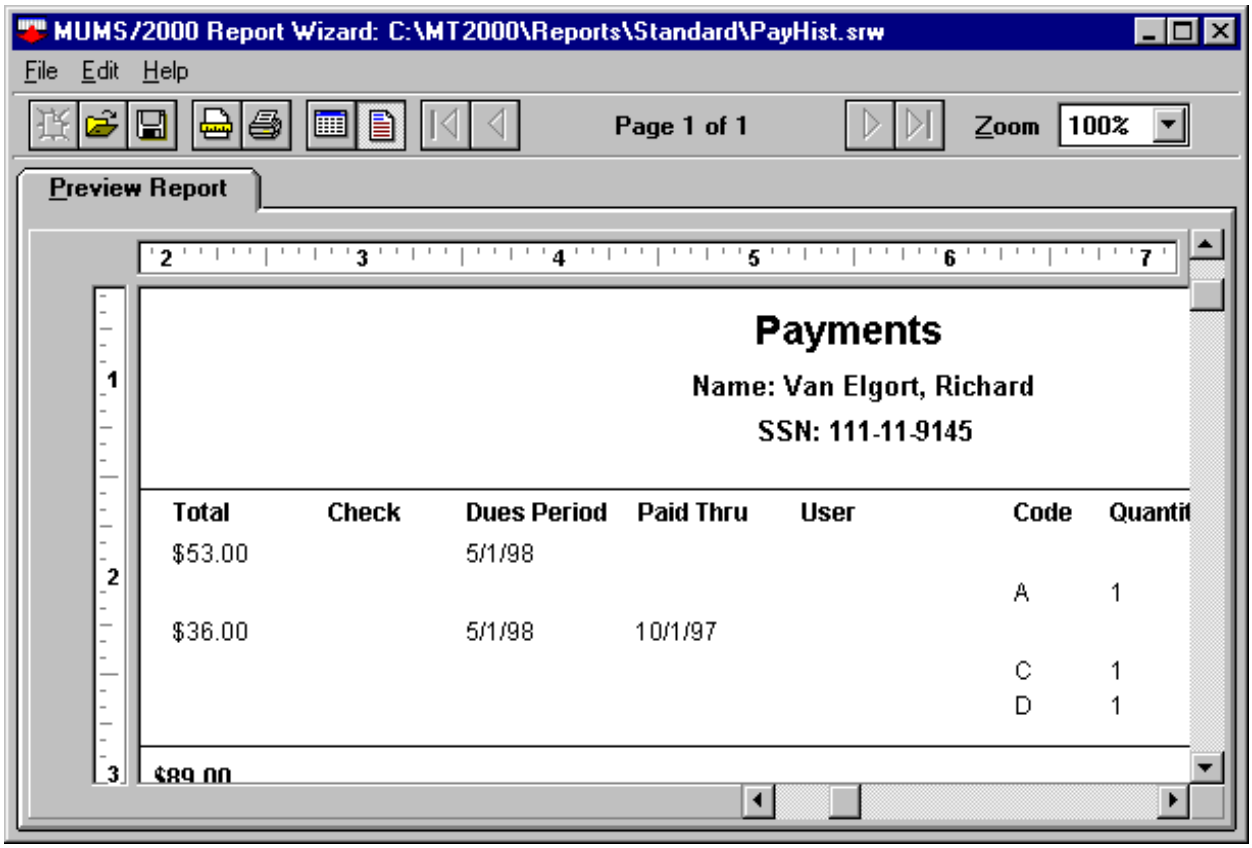
As you highlight a history records, the payment details will appear on the right window. The program will automatically start with the most recent record highlighted.

> There is a HISTORY REPORT button in the bottom left of this screen. This can be used to request a printout of this member’s deductions.

If you press the HISTORY REPORT button, you will get this screen to insert the Starting and Ending Dates. Press the small button next to the date field to view a calendar.



The “Preview” option is used to request a preview of the report as following:

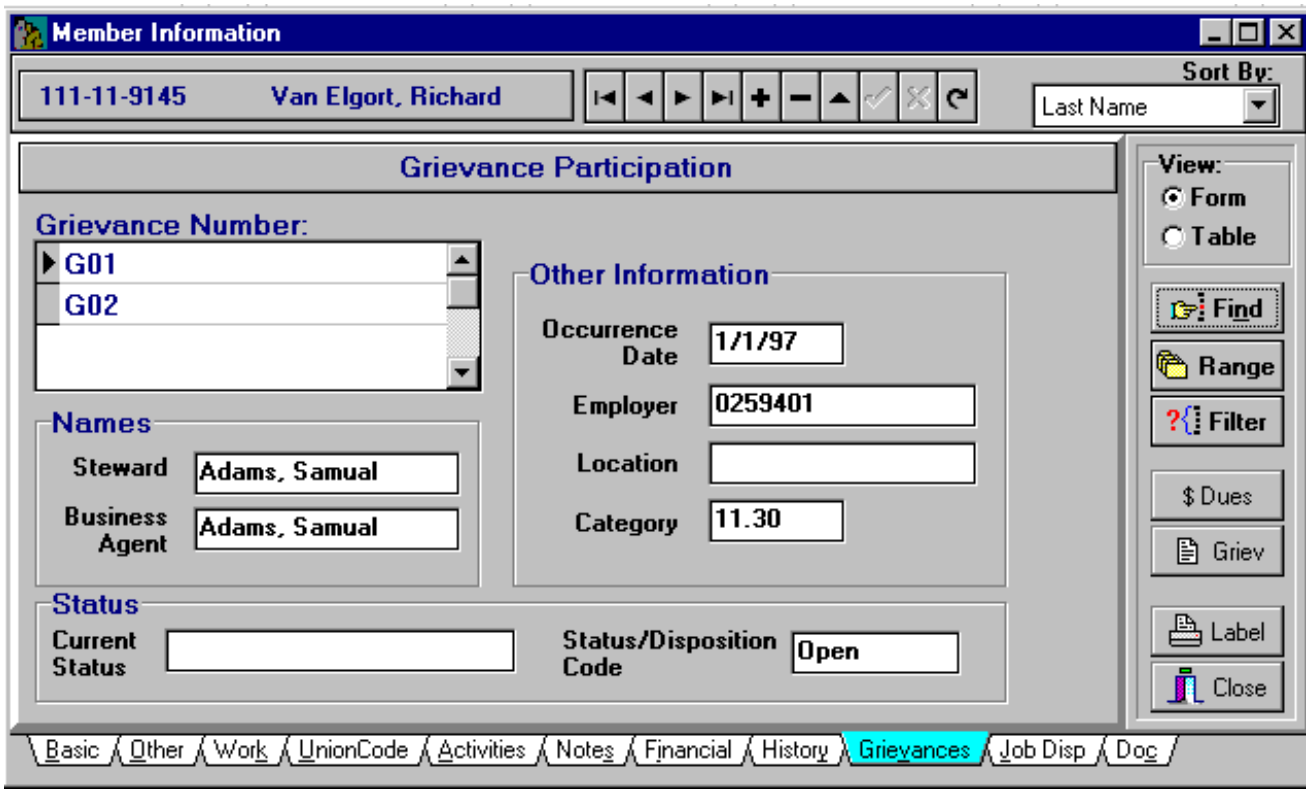


You can get a similar report under the following:

Reports|Standard Reports|Financial Reports|Member Payment History

Notes on printing from Preview screens will be described in Chapter 7.

Member Tab - GRIEVANCES



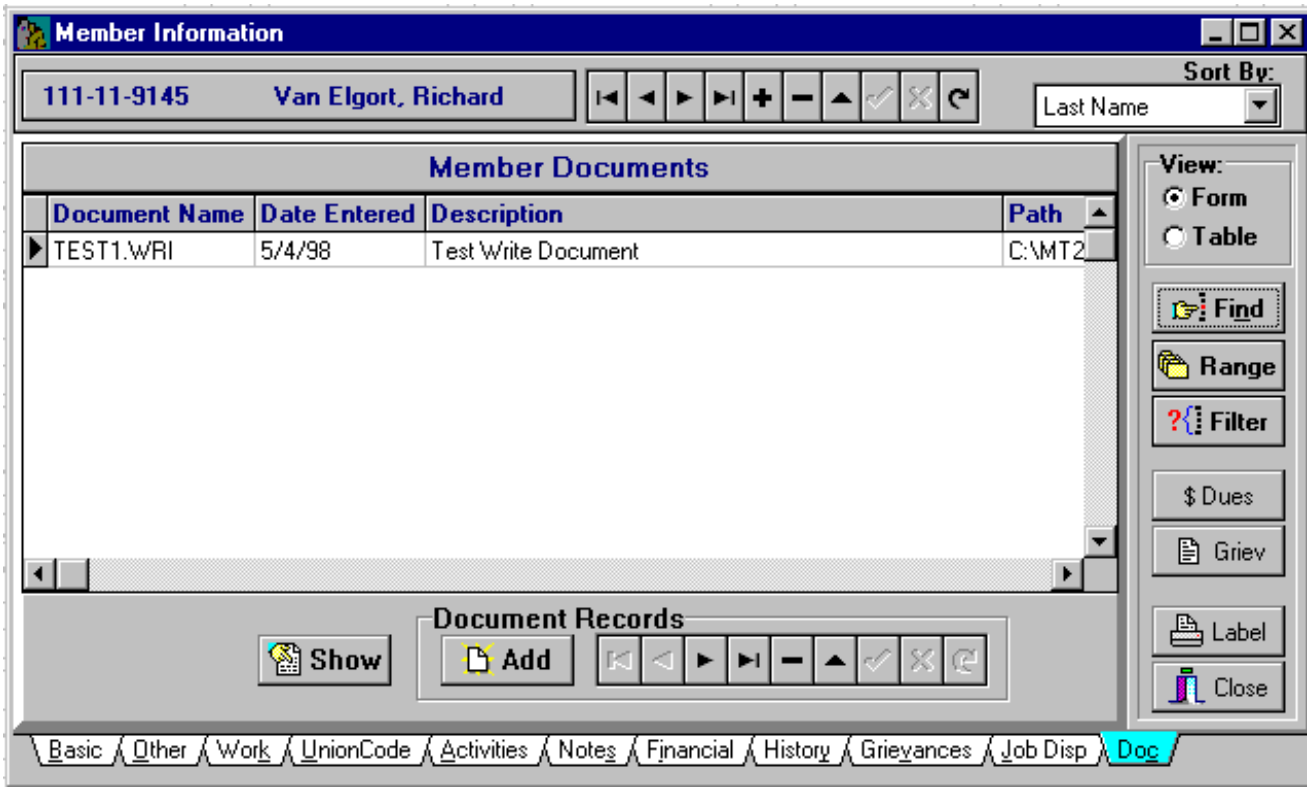
This is the **GRIEVANCES** Tab.

This is a brief overview of the grievances on which this individual is a participant. You can use the scroll bar to review any number of grievances for this person. This highlighted grievance in the scroll window will then change all the other fields on the screen to show the information that pertains to the individual grievance. The names, status, and other information will change as you go from one grievance to another.

If you double-click on the grievance number, MUMS/2000 will automatically load the Grievance System and select the requested grievance for initial display.

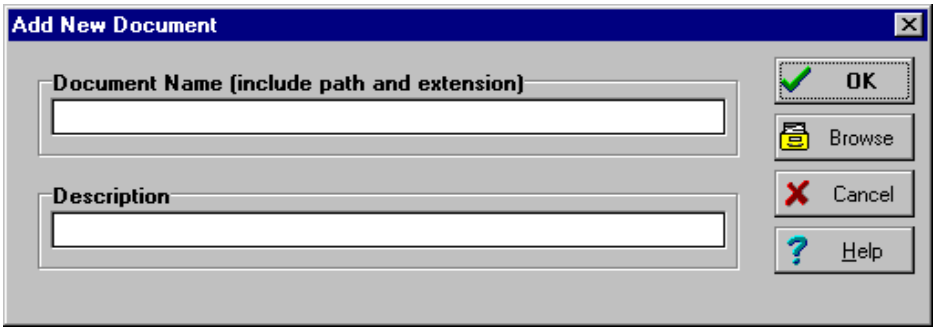
You can also use the Side Bar button to go to the Grievance Tracking System positioned at the first grievance on which this member is a participant. You can go the Grievance Tracking system in general by using the button on the Tool Bar.

Member Tab - DOCUMENTS



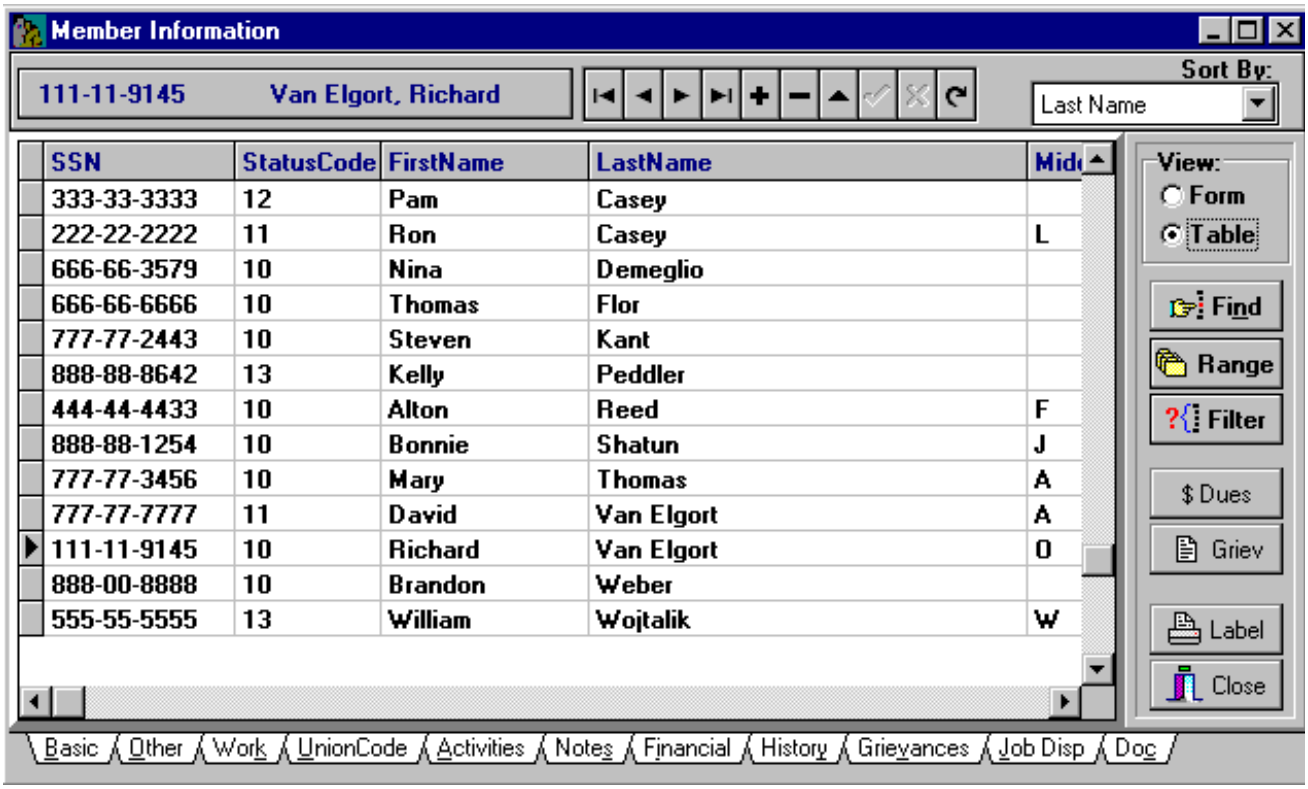
Attached documents can be text files, scanned images, photos or even voice files. You can highlight a document and press the "Show" button to retrieve the document or double-click on the document name.

You can press the "ADD" key to add a document via the Browse button. You can then enter a long custom description.



Please Note: **See Chapter 8 at the end of this Manual for more information on Attached Documents.**

Member Tab - TABLE VIEW



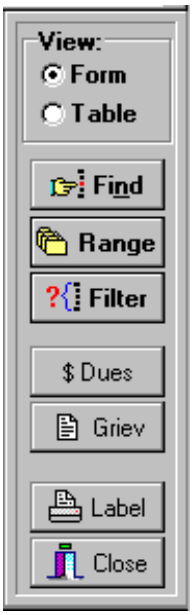
This is the Table View of Member Information. You request this from the View Radio Group by clicking on TABLE. From here you have an overall view of all member records. You can also use the Pop-Up Menu to switch views.

This presentation is based upon the Sort sequence indicated. The presentation will also be effected by the Range and Filter functions.

You can retrieve a member's record by double-clicking on the entry. You can also scroll to the right to see other fields on the member's records. The program will automatically switch back to Form View when you request a record. If you highlight an individual line with a Hot Comment, the warning automatically will be displayed.

> You can reformat the Table View by re-sizing or re-arranging the columns. See the section under Quick Reports Chapter 7 for a review on how to re-size and re-arrange columns. Once you change the columns the program will remember your settings for future use.

Member Side Bar Action Buttons



The View Options are used to switch the presentation from Form to Table View.

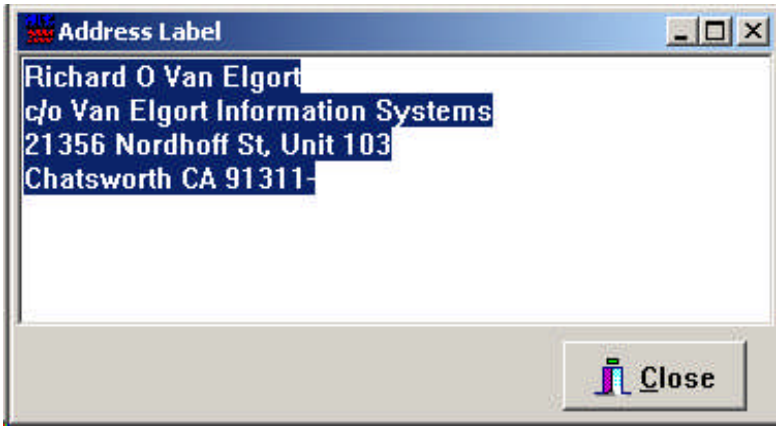
The FIND, RANGE and FILTER buttons are used to locate records or create a group of records that match a selection.

The DUES buttons are used to link to the Cash Receipts system and open up a transaction for the member.

The GRIEV button links to the Grievance Tracking System and is positioned at the first grievance for the member.

The LABEL button is used to format a Name and Address within a window so that you can use a label printer such as a Smart Label Printer from Seiko or Avery.

The following is an example of pressing the LABEL button.



Depending upon your label printer, you will have to an automatic extract feature you might have. Or since the information is already highlighted, you can click on the right mouse button and copy to then later paste wherever you want the name and address.