

# PTA's Online Membership Data Reporting System (OMDR)



## Virginia PTA User's Manual for Local Unit Leaders

Karen Fellows  
Virginia PTA Membership Committee  
OMDR Support  
757-545-4317 (H)  
[omdr@vapta.org](mailto:omdr@vapta.org)

## OMDR Local Unit Leader Manual

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## Accessing OMDR for the First Time

**Note: Initial access to a local unit's OMDR site is given to the local unit president and/or membership chairperson. To access OMDR the first time, the local unit president/chairperson needs his/her local unit ID number and member ID number. These numbers will be provided by Virginia PTA at the request of the Local Unit President or Membership Chairperson . If you have not received these numbers please contact [omdr@vapta.org](mailto:omdr@vapta.org).**

1. Go to <https://www.pta.org/omdr>.
2. Click "First Visit" in order to create your username and password.
3. Enter your first name, last name, member ID, and local unit ID in the appropriate boxes (be sure member and unit ID numbers are 8-digits and include the leading zeros). Choose your position (ex: local unit president) from the drop-down menu. Enter your desired username. Click submit.
4. Enter your desired password then retype this password in the appropriate boxes. Enter your e-mail address, choose a secret question from drop-down list, and answer the secret question in the appropriate boxes (this information is used to recover password, if necessary). Click submit.
5. You will receive a confirmation page indicating that your OMDR account was successfully added.
6. You can click from this page to go to the local unit sign in page, or return to the OMDR main menu.
7. You can now sign-in to OMDR using the username and password you just created by going to [www.pta.org/omdr](http://www.pta.org/omdr) and signing on.

**Note: As local unit president or membership chairperson, it is possible that you will not be the primary person within your unit in charge of using OMDR. In some cases, the treasurer, or another board member is responsible for keeping track of membership and will need to use OMDR. In order for others to access the system you have two options:**

1. Enter person who needs access into the system (see Entering Local Unit Officers and Members Into OMDR) and provide them with their Member ID number so that they can go through the first visit process and create their own username and password for future use. PLEASE NOTE: *to gain access, the officer's title must be Local Unit President, Membership Chair, Secretary, or Treasurer.*
2. Provide your username and password to any other individuals within the unit who have been authorized to use OMDR.

# Local Unit Update

Please take a moment after you log in to OMDR to click on **LOCAL UNIT UPDATE** and complete the information.

Your membership year should be set to the current membership year. The membership year must end on 10/31/2008 per Virginia PTA Bylaws – the begin date is flexible and the dates can overlap (Ex: 08/01/2007-10/31/2008). You must then log completely out of the system and back in for these changes to take effect.

## Local Unit Information

Items marked with ± are required fields.

<b>Local Unit Name: ABC Elementary School PTA</b>	
<b>PTA ID Number: 00012345</b>	
Please enter your Local Unit's name exactly as it should appear on all formal correspondence and documentation: ± <input type="text" value="ABC Elementary School PTA"/>	
How do you classify your Local Unit? ±	<input type="text" value="PTA"/>
Local Membership Year: ±	<input type="text" value="Aug"/> / <input type="text" value="01"/> / <input type="text" value="Oct"/> <input type="text" value="31"/> <b>Current Year:</b> <input type="text" value="2008 - 2009"/> <b>Only set at beginning of new year.</b>
Local Unit's Postal Address: ±	<input type="text" value="Attn: PTA President"/>
Address (Cont.):	<input type="text" value="123 Main Street"/>
Address Type: ±	<input type="text" value="School"/>
City: ±	<input type="text" value="Chesapeake"/>
State: ±	<input type="text" value="Virginia(VA)"/>
ZIP/PC: ±	<input type="text" value="23320"/> + 4 Code <input type="text" value=""/> <a href="#">lookup</a>
Country: ±	<input type="text" value="United States(USA)"/>
Local Unit phone /Type:	<input type="text" value="757"/> <input type="text" value="547"/> <input type="text" value="0238"/> <input type="text" value="School"/>
This phone goes to the local unit president?	<input type="text" value="No"/>
Please provide your Local Unit e-mail address (where PTA information will be sent):	<input type="text" value="abcpta@PTAmail.net"/>
This e-mail address goes to the:	<input type="text" value="PTA President"/>
How much are your Local Unit's dues per member? :	\$ <input type="text" value="5"/> . <input type="text" value="00"/>
How many schools does your Local Unit serve? :	<input type="text" value="1"/>

## **To enter local unit officers into OMDR one at a time:**

1. Go to <https://www.pta.org/omdr>.
2. Enter your username and password.
3. Click "Officer Entry Screen."
4. Enter local unit officer's contact information being sure to enter all fields indicated as required. (Amongst the required information is the officer's position and term beginning and end date.) Click continue.
5. You will then see a screen on which you can review the information entered. If all information is correct click "Add This Record." (If any changes need to be made click "Edit This Record" which will take you back to previous screen.)
6. Next you will receive a screen confirming that the record was successfully added. NOTE: This conformation screen lists the National PTA ID number for the unit and the officer entered. If this officer will need to access OMDR you should provide him/her with these numbers so they can go through the first visit process and create their own username and password.

## **To enter local unit members into OMDR one at a time:**

1. Go to <https://www.pta.org/omdr>.
2. Enter your username and password.
3. Click "Member Entry."
4. Enter member's contact information being sure to enter all fields indicated as required. Click continue.
5. You will receive a confirmation screen verifying that the record was successfully added.

# Uploading Excel Files to OMDR

To enter a **list** of local unit officers and/or members into OMDR **at once**:

Go to <https://www.pta.org/omdr>.

1. Enter your username and password.
2. Click “Add Local Members (Batch Upload).”
3. Click Browse to find your saved file (**see Creating Files for Upload below for instructions on properly creating and saving file**).
4. Locate your saved file and click “open” – file path will then appear in “file” box.
5. Click upload.
6. Wait approximately 15 minutes for data to appear in database.
7. Click “Review File Upload Log for Errors” on main options screen see any entries that were not successfully uploaded – make any adjustments to these records and repeat upload process for those that failed (or add these records one at a time).

## Sample Excel Uploading Template

LOCAL_UNIT	NAME_PREFIX	FIRST_NAME	MIDDLE_NAME	LAST_NAME	NAME_SUFFIX	ADDRESS_1	ADDRESS_2	ADDRESS_3	CITY	STATE	ZIP	HOME_AREA	HOME_TELEPHONE	WORK_AREA	WORK_TELEPHONE	FAX_AREA	FAX_NUMBER	EMAIL	POSITION	BEGIN_DATE	END_DATE	
00012345		Maria		Dearst		3420 S. Lake St.			Chicago	IL	60612	773	4567832					<a href="mailto:mdearst@pta.org">mdearst@pta.org</a>	MBR	9/1/2007	8/31/2008	
00012345		Alex		Kinzer		892 N. Kenzie.	Apt. 2		Chicago	IL	60601	312	2398761					<a href="mailto:akinzer@pta.org">akinzer@pta.org</a>	MBR	9/1/2007	8/31/2008	
															3489284							

# Creating Excel Files for Upload

Excel files submitted for upload must be exactly the same as the templates we have available for download. Do not upload files that are not formatted as described below.

The column names must be exactly the same as within the template. The worksheet name containing all the data must be set to **Sheet1**. All column heading must be **Capitalized** and in the same order as shown below (Left to Right). See "Filled-in" template for illustration.

## Membership Files

The fields included in a membership upload file are listed below. This template is available for download. You do not need to recreate this file.

Description	Excel Mapped Column		
PTA Local Unit ID Number	LOCAL_UNIT	required	
Name Prefix	NAME_PREFIX	optional	
First Name	FIRST_NAME	required	
Middle Name	MIDDLE_NAME	optional	
Last Name	LAST_NAME	required	
Name Suffix	NAME_SUFFIX	optional	
Address_1	ADDRESS_1	required	
Address_2	ADDRESS_2	<i>(apt./suite, if applicable)</i>	optional
Address_3	ADDRESS_3	optional	
City	CITY	required	
State	STATE	required, <i>not to exceed 2 characters</i>	
ZIP Code	ZIP	required	
Home Telephone Area Code	HOME_AREA	recommended	
Home Telephone	HOME_TELEPHONE	recommended	
Work Telephone Area Code	WORK_AREA	recommended	
Work Telephone	WORK_TELEPHONE	recommended	
Fax Number Area Code	FAX_AREA	optional	
Fax Number	FAX_NUMBER	optional	
E-mail	EMAIL	recommended	
Position	POSITION	required <i>(MBR is default)</i>	
Membership Year Begin Date	BEGIN_DATE	required	
Membership Year End Date	END_DATE	required	

Note that fields can be empty, but not missing. The fields are described in detail below.

**Field 1—LOCAL\_UNIT**

**This is a required field.**

The "ID Number" is 8 digits. All 8 digits (including leading zeros) are **required** for electronic submission of local unit information (example: use 00001234, not 1234).

Note that all entities in the membership database have a unique 8-digit identification number.

**Field 2—NAME\_PREFIX**

Optional. Maximum length is 15 characters.

**Field 3—FIRST\_NAME**

**Required.** Maximum length is 40 characters.

**Field 4—MIDDLE\_NAME**

Optional. Maximum length is 40 characters.

**Field 5—LAST\_NAME**

**Required.** Maximum length is 40 characters.

**Field 6—NAME\_SUFFIX**

Optional. Maximum length is 10 characters.

**Field 7—ADDRESS\_1**

**Required.** Maximum length is 40 characters.

**Field 8—ADDRESS\_2**

Optional. Provide the apartment or suite number, if applicable. Maximum length is 40 characters.

**Field 9—ADDRESS\_3**

Optional. Maximum length is 40 characters.

**Field 10—CITY**

**Required.** Maximum length is 25 characters.

**Field 11—STATE**

**Required.** Must be the standard USPS two (2) character state code. Use upper case.

**Field 12—ZIP**

**Required.** Use either the standard USPS 5 digit (ZIP), or 9 digit (ZIP + 4 optional) code. Do not include the hyphen. Use the appropriate postal code for non-U.S. addresses. **The maximum length of the data in this field is 15 characters.**

**Field 13—HOME\_AREA**

Recommended. **Maximum length is 3 characters.**

**Field 14—HOME\_TELEPHONE**

Recommended. Requested format is xxxxxxxx for U.S. phone numbers. **Exclude all non numeric characters. Maximum length is 15 characters.**

**Field 15—WORK\_AREA**

Recommended. **Maximum length is 3 characters.**

**Field 16—WORK\_TELEPHONE**

Recommended. Requested format is xxxxxxx for U.S. phone numbers.

**Exclude all non numeric characters. Maximum length is 15 characters.**

**Field 17—FAX\_AREA**

Optional. **Maximum length is 3 characters.**

**Field 18—FAX\_NUMBER**

Optional. Requested format is xxxxxxx for U.S. phone numbers. **Exclude**

**all non numeric characters. Maximum length is 15 characters.**

**Field 19—EMAIL**

Recommended. Maximum length is 60 characters.

**Field 20—POSITION**

**Required.** The field must contain one of the following values:

Abbreviation	Position
MBR	Local Unit Member (can also be used for council/district/region)
LUP	Local Unit President
PRESELEC	President-Elect
VP	Local Unit Vice President
LUTR	Local Unit Treasurer
LUSEC	Local Unit Secretary
MEMBCH	Local Unit Membership Chair
CONSULT	Consultant
COORD	Coordinator
HIST	Historian
LEGCH	Legislative Chair
PARLIAM	Parliamentarian
PICHR	Parent Involvement Chair
PRCHR	Public Relations Chair
STUDENT	Student
VPELECT	Vice President-Elect

**Field 21 Begin Date**

**Required.** Format: MM/DD/YYYY

**Field 22 End Date**

**Required.** Format: MM/DD/YYYY

# Creating ASCII Text Files for Upload

National PTA requests that files submitted for upload be excel or comma delimited ASCII text files. They should not contain formatting such as fancy fonts, italics, or boldface. ASCII text files are also referred to as text files, DOS files, or DOS text files.

To upload a file it must include the fields as specified below. Files can also be created using the Microsoft Access database tool or Excel spreadsheet tool, and instructions for using those programs are listed below.

The 23 fields included in an upload file record are as listed below and in the following order:

**Note: optional fields (columns) can be empty, but not missing.**

## Field 1—Local Unit ID Number

**Required.** The "ID Number" is 8 digits. All 8 digits (including leading zeros) are **required** for electronic submission of local unit information (example: use 00001234, not 1234).

Note that all entities in the membership database have a unique 8-digit identification number.

## Field 2—Name Prefix

Optional. Maximum length is 15 characters.

## Field 3—First Name

**Required.** Maximum length is 40 characters.

## Field 4—Middle Name

Optional. Maximum length is 40 characters.

## Field 5—Last Name

**Required.** Maximum length is 40 characters.

## Field 6—Name suffix

Optional. Maximum length is 10 characters. The name suffix field must contain one of the following values:

AA	II	MD
AS	III	MLS
BA	IV	MPA
BS	JD	PhD
CPA	Jr.	RN
DDS	LCSW	Sr.
DMD	MA	None (Default)
I	MBA	

**Field 7—Address\_1**

**Required.** Maximum length is 40 characters. Do not place any commas in the field. If needed, use the additional address fields for apartments, suites, etc.

**Field 8—Address\_2**

Optional. Provide the apartment or suite number, if applicable.  
Maximum length is 40 characters.

**Field 9—Address\_3**

Optional. Maximum length is 40 characters.

**Field 10—City**

**Required.** Maximum length is 25 characters.

**Field 11—State**

**Required.** Must be the standard USPS two (2) character state code. Use upper case.

**Field 12—ZIP Code**

**Required.** Use either the standard USPS 5 digit (ZIP), or 9 digit (ZIP + 4 optional) code. Do not include the hyphen. Use the appropriate postal code for non-U.S. addresses. **The maximum length of the data in this field is 15 characters.**

**Field 13—Home Telephone Area Code**

Recommended. **Maximum length is 3 characters.**

**Field 14—Home Telephone**

Recommended. Requested format is xxxxxx for U.S. phone numbers.

**Exclude all non numeric characters. Maximum length is 15 characters.**

**Field 15—Work Telephone Area Code**

Recommended. **Maximum length is 3 characters.**

**Field 16—Work Telephone**

Recommended. Requested format is xxxxxx for U.S. phone numbers.

**Exclude all non numeric characters. Maximum length is 15 characters.**

**Field 17—Fax Telephone Area Code**

Optional. **Maximum length is 3 characters.**

**Field 18—Fax Number**

Optional. Requested format xxxxxx for U.S. phone numbers. **Exclude all non numeric characters. Maximum length is 15 characters.**

**Field 19—E-mail**

Recommended. Maximum length is 60 characters.

**Field 20—Position within the Local Unit**

**Required.** The field must contain one of the following values:

Abbreviation	Position
VPELECT	Vice President-Elect
CONSULT	Consultant
COORD	Coordinator
HIST	Historian
LEADER	Leader
LEGCH	Legislative Chair
LUP LUSEC LUTR	Local Unit President Local Unit Secretary Local Unit Treasurer
MBR	Member (Default)
MEMBCH	Membership Chair
PARLIAM	Parliamentarian

Abbreviation	Position
PICHR	Parent Involvement Chair
PRCHR	Public Relations Chair
PRESELEC	President-Elect
STAFF	Staff
STUDENT	Student
VP	Vice President

**Field 21 - Begin Date**

**Required.** Format: MM/DD/YYYY

**Field 22 - End Date**

**Required.** Format: MM/DD/YYYY

**Field 23 – Member ID Number**

Used only for batch update. Data not required for upload. This number will be assigned to each individual after they have been input into the system for the first time.

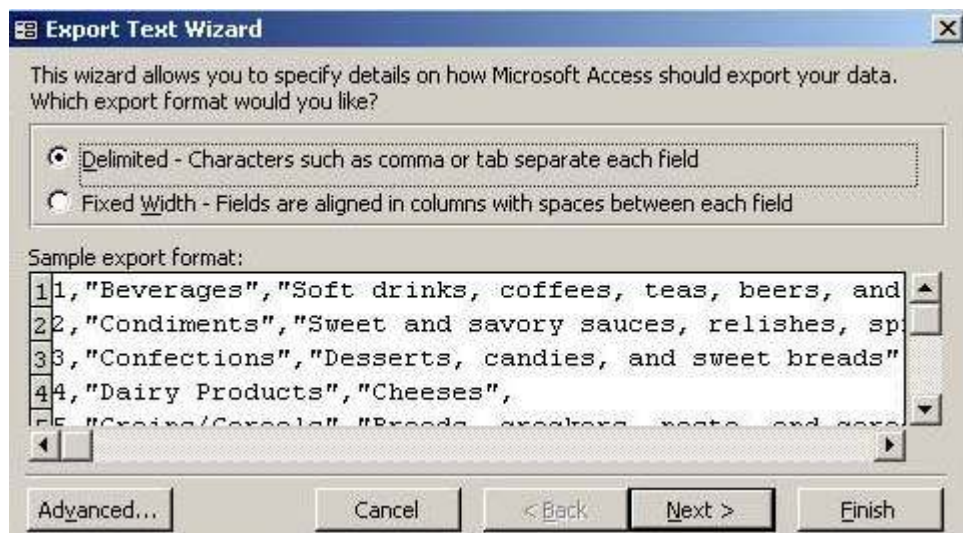
# Creating Files for Upload with Microsoft Access

In Microsoft Access, to create and save export specifications, follow these steps:

1. Start Microsoft Access and open your database.
2. In the database window, click "Tables" (under "Objects"), and then click the appropriate table or query.
3. On the "File" menu, click "Export."
4. In the "Export To" dialog box, click "Text Files" in the "Save As" type box, and then click "Save" or "Save All." (Be certain "Save Formatted" is unchecked.)

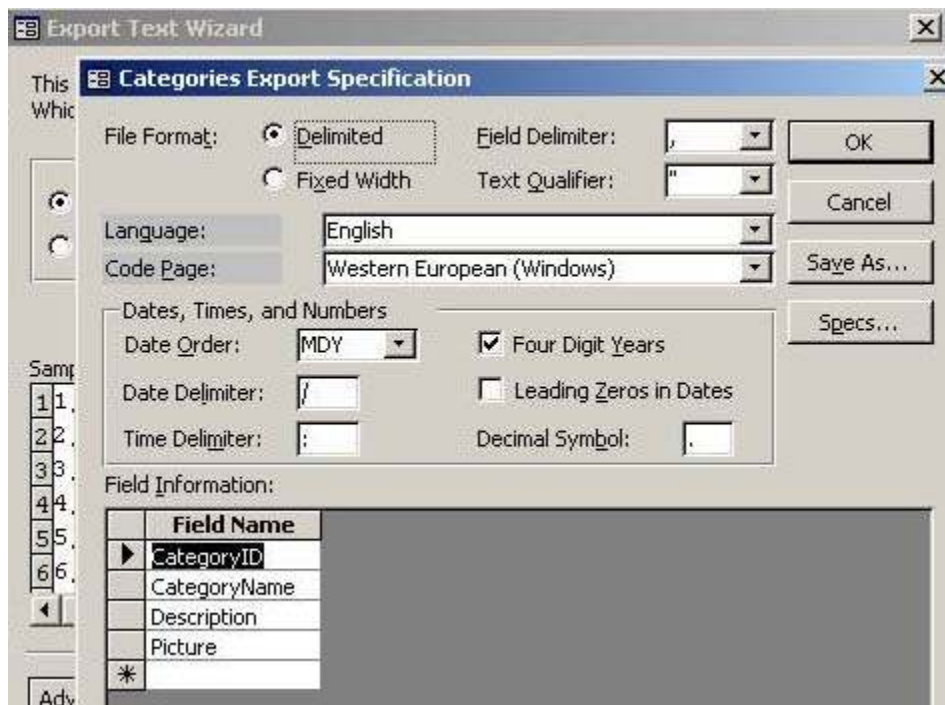


5. This opens the Export Text Wizard. Note that the example used is the Northwind Database.

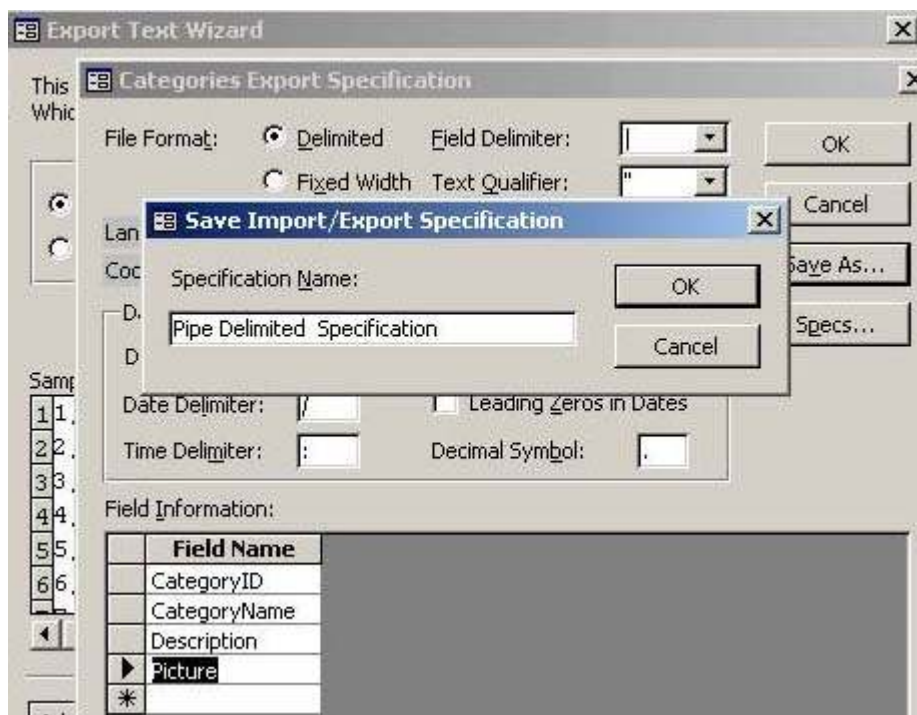


6. In the Export Text Wizard, click "Advanced."

- In the "Categories Export Specification" dialog box, change the "Field Delimiter" from the comma (,) to the pipe character (|). Also change the "Text Qualifier" from double quotes (") to a blank or empty field.



- Click on "Save As."
- In the "Save Import/Export Specification" dialog box, type "Pipe Delimited Specification," and then click "OK."



- Those settings are now saved.

## Downloading Local Unit Membership List

1. Go to <https://www.pta.org/omdr>.
2. Enter username and password.
3. Click option "View & Download Member/Officer List" under Reports.
4. Choose what list you would like to download.
  - a. In "Label Group" you can choose "Members" or "Officers."
  - b. In "Term" you can choose "Current" or "Future."
  - c. In "Output" you can choose to download the file into an Excel spreadsheet or into a text spreadsheet. (If you have Excel on your computer, it is highly recommended that you download directly into Excel).
5. Click "Submit."
6. Click "Download Excel File."
7. The file will download automatically into Excel or the text format.

You now have an Excel file you can use that shows each member's ID and contact information. You can use this file to mail merge for mailing label generations, keep a hard copy for your membership files, and more!

## To Print Membership Cards

1. Log into OMDR.
2. You have two options to print membership cards. You can print them with all of the information (including the members' names), or you can print the cards with all of the information EXCEPT the PTA members' names.
3. To print with the names, click Membership Card PDF. To print without the names, click Membership Card PDF (Blank).
4. Follow the instructions listed on the page, a sample is below.
5. All members that are entered in OMDR and are active for the current school year will be listed in the left hand column.
6. An asterisk by their name indicates that the member has all ready had their card printed.

### **IMPORTANT:**

#### **Prior to printing membership cards please:**

- Review all instructions before printing membership cards.
- You will want to test your settings on photocopies of PTA card stock to minimize waste.
- You will need the Adobe Reader in order to print membership cards. If you don't have it, follow the link to get [Adobe Reader](#) now.

**NOTE:** Update the Local Membership Year on the "Local Unit Update" page so accurate dates will print on the card

## INSTRUCTIONS:

1. Click on the names of members in the list box.

- To select multiple members' names, hold down the Control key (Ctrl) while clicking names.
- To select all or a range of members' names, click the first member's name; while holding down the Control and Shift keys, scroll down the list and click the last member's name you want selected. This highlights all records between the first and last selection.
- If all but a few members' names are desired, follow the above procedure. Highlight the selected range; while holding down the Control key, click on the members you wish to deselect.

A., Franklin  
B., Schroeder  
Boop, Betty  
Brown, Charlie  
Brown, Sally  
Clark, Ann  
Clark, Lee \*  
Coxhead, Steve \*  
Donovan, Jan  
E., Marcie  
James, Woodstock  
Jean, Peggy  
Loewy, Al  
M., Pigpen  
Patty, Peppermint  
Pawlowski, Paula \*  
Swanson, Linda  
Van Pelt, Linus  
Van Pelt, Lucy  
Van Pelt, Rerun

2. Once names have been selected, click "Download PDF" to receive the 2007 membership card file (2007membershipcard.pdf). You may have to wait for up to 30 seconds to receive the PDF, depending on the number of members entered. Save the PDF file on your computer. [See illustration](#)

3. Open the PDF file and print a test page. You can do this by selecting "Pages 1 to 1" or "Current Page." [See illustrations](#)

4. You may need to adjust your page alignment and retest, as results vary from printer to printer. You can adjust how the information prints on the card by changing the Height Adjustment or Width Adjustment (see boxes below).

**Height Adjustment**  
(-55 to 55)

+ moves text up on page. - moves text down on page.

**Width Adjustment**  
(-55 to 55)

+ moves text toward the right. - moves text toward the left.

5. Once all adjustments have been made, you're ready to print. Up to ten cards per page will print. For example, if you have only six names, four cards will remain blank.

\* Card has been previously printed.