

Administrator Access to Website & Database

All IHC membership records are stored in one central database. This database contains member details, financial records, event records and other related data. As this information is the members personal property a member can inspect some of these records and make certain changes. Members only have access to their own records and cannot see other members information except limited contact details as per the club Privacy Policy. Users with administrator privilege (typically committee members) can view all of the database records, can search records, produce reports and export spreadsheets.

Administrator Access

How to log in

You log in and can see and edit your own profile in the same way as a member. If you do not know how to do this see “Member Access to Website and Profile” (IHC Document 12) available from the documents page of the club website (ihc.wildapricot.org/documents).

If you have got administrator access, once you have logged in you will see an *Admin View* link at the top of the screen. Click this link to view the full database. The information you can see here can contain private personal data and is protected by the club's *Privacy Policy*. You must not use or disclose this information except as allowed by the *Privacy Policy* or with the permission of the member or members concerned. Once in the database you will see tabs along the top of the screen – these are described below.

Dashboard

To access the *Dashboard* click on the *Dashboard* tab. The *Overview* sub-tab shows general information about the system. Other *Dashboard* sub-tabs show *Account*, *Organisation*, *Referrals*, *Support and Getting Started*. Some of these may not be of particular interest to many, but feel free to look around.

Contacts

Contacts are people who have an association with the club. They may be members or not. Non member contacts may be members of other motorcycle clubs who have registered to ride in an event, for example the *Two Day Rally*. Other non member contacts may be members of other clubs who have asked to be on our mailing list as they have an interest in our events. The important thing to remember is that all *Members* are *Contacts*, but not all *Contacts* are *Members*.

To access *Contacts* click on the *Contacts* tab.

All *Contacts* will be displayed in alphabetical order paged in groups of 50. Use the *Search* box to find who you are looking for. Remember – names may not be entered as you expect! Think of nick names and abbreviated names for example. First try just the first three letters of first and last names separated by a space. If you are looking for a member it is suggested that you use the *Members* tab instead of *Contacts*. Whatever is displayed can be exported as an *Excel Spreadsheet* file by clicking the *Export* button. Clicking on a *Contact Record* will open that record for viewing.

Events

To access *Events* click on the *Events* tab. Here you will see all events, past and future. This list only goes back to 2014 and future events are subject to change and additions. Enter part of the

event name you are looking for to make the list a manageable size. Click on the required event and the details will be displayed. Clicking on the *Registrants* link will show all persons registered for the event. Click on the person for registration details.

Members

Clicking on the *Members* tab takes you first to the *Summary*. This gives an overview of club members and their membership status. *Family* and *Life* membership levels are shown as one number and another number in brackets. The number in brackets is the number of *Bundles* and the larger number is the number of members within those *Bundles*. Typically a *Family* membership *Bundle* will contain two members. One member is designated as the *Bundle Administrator* and is the person to whom membership correspondence is sent. The Indian Harley Club has traditionally counted a two member bundle as one member – hence the discrepancy you may have noticed with the total membership count and what you may have been expecting. Clicking on any highlighted number will display details of those members.

The *List* tab displays all members listed in alphabetical order and paged in groups of 50. In common with the *Contacts* and *Events* screens you can export the members as an Excel spreadsheet by clicking the Export button. Use the search box to find an individual member. Clicking on the member will display the member details. The member page has several tabs described below.

Contact Details is where you will find emails and phone numbers as well as postal address.

The *Membership* tab displays membership information, including *Level* and *Status*.

The *Events* tab displays details of events attended by the member.

At the top of the member page is a highlighted link *Financial Transactions* which has 3 tabs *Invoices*, *Payments & Refunds* and *Audit Log* which reveals the members financial transactions.

Logging Out

When you have finished remember to log out! The *Log Out* link is at the top of each screen. If you are in the administrator section you log out by hovering over the *Account* link and selecting *Log Out*. It is a security and privacy hazard if you do not log out. You can return to the *Home Page* from the *Menu Bar* at the top of the screen.