



Alpha Rho Chi

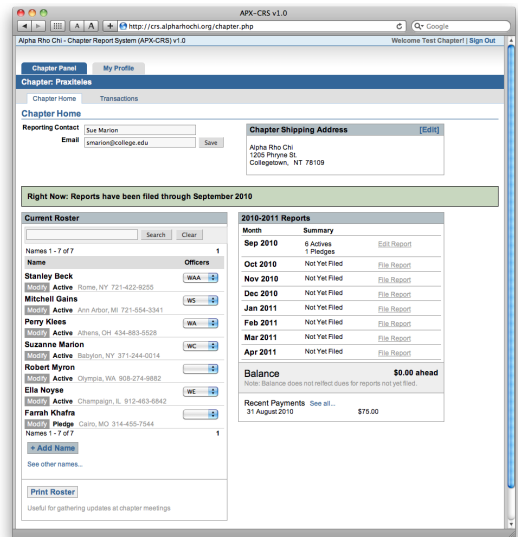
National Professional Fraternity
Architecture and the Allied Arts

Chapter Reporting System Quick Reference Guide

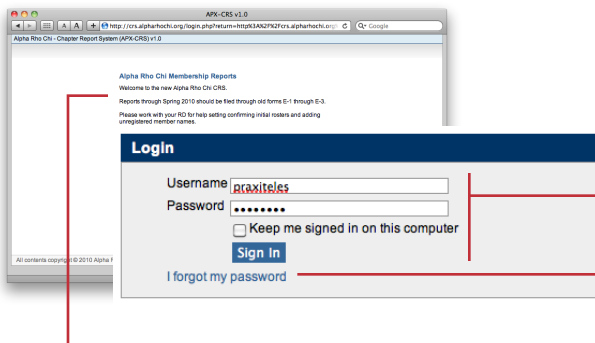
Alpha Rho Chi's Chapter Reporting System (CRS) records active member information, manages chapter rosters, and calculates dues and fees owed.

As an online system, the CRS reduces the number of different reports to be filed by the chapters and ensures chapter officers and the Grand Council share the latest information. Storing the records online, the CRS should help make the transition of chapter officers easier.

This guide is a visual introduction to the main features of the CRS and key tasks such as updating roster information and filing reports.



Log In



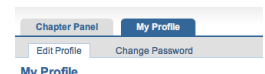
Look for important messages on the login screen

Access the Chapter Reporting System (CRS) at crs.alpharhochi.org

Sign in with the username and password provided to your chapter.

"I forgot my password" will create a temporary password and send it to the email address associated with the user profile.

Contact the WGE if you need you do not have access and need to reset user account information. The password and associated email can be changed inside the CRS from the "My Profile" tab.



Chapter Home

The Chapter Home page shows the chapter's current roster and a summary of reports to date. A banner across the page will remind you if your chapter is behind in its reports.

My Profile allows you to change account password and email

Sign out when you're done using the CRS

Tell us who to contact about your chapter's reports. Click "Save" to lock in the contact name and email.

The left side displays a roster of your chapter's actives and pledges.

If there are more than 50 names, the roster will be split on multiple pages.

Click "Modify" to update a name's contact info or status.

Add new pledges or members with the "Add Name" button.

"See other names..." shows you names not in the active roster such as recent alumni.

Use "Print Roster" to generate an address list you can print out and circulate around the chapter for updates.

Use the drop down menus to indicate which member holds which "worthy" office. (Officer changes are saved automatically.)

Recent Payments displays the most recent recorded entries so you can quickly see if the WGE got your check.

This is the address for shipping packages such as badge orders. This may be different from the chapter's address in the Master Directory. UPS can't ship to most PO Boxes. Click "Edit" to make changes.

The right side displays a summary of reports for the school year.

Click "File Report" to file each month's report. If you've already filed a month, you can edit it. You can even file for future months.

The page displays the latest balance of reported dues and payments

Month	Summary	
Sep 2010	Not Yet Filed	File Report

When reports become due, the page is highlights the month in orange. If multiple months are overdue, the CRS will have you file all the pending months at once.

Make Roster Changes

You can add names or record changes to your chapter roster from the Chapter Home or the File Report page.

Modify an Entry

Click "Modify" to revise a roster entry.

The roster entry will expand to show all roster information

Status change options vary depending on the member's status. Dates indicate when the selected change takes effect.

Status History provides a summary of the member's status in the CRS.

Basic name information and phone/email contact info

Permanent address (typically a parent's) is used for mailings such as *The Archi*. It also provides an initial to use post-graduation.

School address can be used for recording local addresses during the school year.

Click "Save" to record your changes or hit "Cancel"

The button changes to green to indicate a change has been made.

Add a Name

Click "Add Name" to get a blank entry to fill in for new pledges or faculty/honorary initiations

If an active transfers to the chapter, you can load their information using the member ID from the Member Database at database.alpharhochi.org

The CRS provides status change options based on the current status for that name. Here are some examples:

When recording a member's initiation...

... the system will prompt you for badge order options

If you make a status change, you can undo it until you file or edit a monthly report.

Note: contact information for pledges are not recorded in the Member Database until initiation.

File Reports

2010-2011 Reports		
Month	Summary	
Sep 2010	6 Actives 1 Pledges	Edit Report
Oct 2010	Not Yet Filed	File Report
Nov 2010	Not Yet Filed	File Report
Dec 2010	Not Yet Filed	File Report
Jan 2011	Not Yet Filed	File Report
Feb 2011	Not Yet Filed	File Report
Mar 2011	Not Yet Filed	File Report
Apr 2011	Not Yet Filed	File Report
Balance		\$0.00 ahead
Note: Balance does not reflect dues for reports not yet filed.		
Recent Payments See all...		
31 August 2010		\$75.00

Selecting a Monthly Report

File a report by clicking the link on the right side of the Chapter Home page.

If the chapter is behind on reports, the CRS will highlight those months in orange. In this case, when you click "File Report," it will file reports for all those months in a single transaction.

The CRS allows you to file reports for future months, but remember you may need to edit those reports later to record new pledges or members.

Filing a Report

The report uses the month's roster to calculate dues and fees for that month.

Click to clear all pending status changes in the roster. Be careful!

Confirm who is filing this report.

Chapter: Praxiteles

Chapter Home Transactions

Report for October 2010
31 Aug 2010

Reporting Contact: Sue Marion
Email: smarion@college.edu

[Cancel Changes](#)

The roster will reflect changes you made on the Chapter Home page. The status for the members is for the given month.

1. Update the Roster

Names 1 - 9 of 9

Name	Status	Address
Stanley Beck	Active	Rome, NY 721-422-9255
Mitchell Gains	Active	Ann Arbor, MI 721-554-3341
Perry Klees	Active	Athens, OH 434-883-5526
Suzanne Marion	Active	Babylon, NY 371-244-0014
Robert Myron	Active	Olympia, WA 908-274-9882
Ella Noyse	Active	Champaign, IL 912-463-6842
Farah Khafra	New Initiate	Cairo, MO 314-455-7544
Dwight Ely	First Month Pledge	Columbus, OH 614-222-6806
Archibald Volt	First Month Pledge	Washington, DC 721-979-7120

[+ Add Name](#)

[See other names...](#)

You can make status changes from the roster on this page and add new names just like on the Chapter Home screen.

2. Review the Totals

October 2010

6 Actives	x \$12.50	= \$75.00
1 New Initiates	x \$75.00	= \$75.00
Jewelry upgrade(s)		
Farah Khafra		= \$24.00
2 First Month Pledges	x \$50.00	= \$100.00
Total for Month		
		\$274.00

New Reports Total: \$274.00

Total Due: \$274.00

Ship Badges/Certificates To:
Plan 2 months for shipping. No P.O. boxes.

Name: Alpha Rho Chi

Name: _____

Address: 1205 Phryne St.

Address: _____

City: Colletown

State: NT

Zipcode: 78109

Update Chapter Shipping Address

Additional comment:
Special message for the WGE here

[Submit Report](#)

The month's totals reflect the number of actives and any other fees from the roster.

The total due reflects this report only and not the overall chapter balance.

If the report has new initiates, confirm the shipping information for this order. If summer is coming, you may need to use an alternate address.

Share a note with the WGE if necessary.

Note: In addition to the reporting contact, the CRS can send emails notices to other chapter officers. For example, the chapter may want the WA to be copied when reports are filed.

Contact the WGE to set up additional email notifications.

Alpha Rho Chi - Chapter Report System (MFC) v1.0

Chapter: Praxiteles

Report for October 2010
31 Aug 2010

Print your final totals. For completing the report. The information has been forwarded to the WGE. A copy has been sent to smarion@college.edu. Here is a summary of the report. You can print this for your records.

Report of the Chapter for October 2010			
Prepared by Sue Marion at smarion@college.edu			
4 Actives	x \$12.50	= \$50.00	
1 New Initiates	x \$75.00	= \$75.00	
Jewelry upgrade(s)			
Farah Khafra		= \$24.00	
2 First Month Pledges	x \$50.00	= \$100.00	
Total for Month			
		\$274.00	
New Reports Total:			
		\$274.00	
Total Due: \$274.00			

Additional comments:
Special message for the WGE here

This report includes the following new initiates:
Farah Khafra

Badges and certificates will be shipped to the following address (if P.O. boxes):
Alpha Rho Chi
1205 Phryne St.
Colletown, NT 78109

Please make check payable to Alpha Rho Chi and mail to:
Alpha Rho Chi
Omega, NC 28135

When you're done, click "Submit Report"

A summary will appear that you can print out and send with a check if desired.

The system will also follow up with emails to the Reporting Contact, WGE and others as designated. (see note to the left)

Edit Reports

You can revise reports after you have initially filed them for corrections or new information.

Select the "Edit Report" link to the right of the month on the Chapter Home screen. You'll see the familiar report screen.

Click to clear all pending status changes in the roster.

The roster as of the month you selected is displayed.

You can make changes to the roster here. For example, we added a returning active effective Sept. 2010.

Other changes you made from the Chapter Home screen are reflected in this roster as well.

Chapter: Praxiteles
Chapter Home Transactions

Edit Report for October 2010
31 Aug 2010

Reporting Contact: Sue Marion
Email: smarion@college.edu

1. Update the Roster

Names 1 - 10 of 10

Stanley Beck Active Rome, NY 721-422-9255
Mitchell Gains Active Ann Arbor, MI 721-654-3341
Marilyn Halles Active Glenwood, IL 630-230-2034
Perry Klees Active Athens, OH 434-883-5528
Suzanne Marion Active Babylon, NY 371-244-0014
Robert Myron Active Olympia, WA 908-274-9882
Ella Noyse Active Champaign, IL 912-463-6842
Farrah Khafra New Initiate Cairo, MO 314-455-7544
Dwight Ely First Month Pledge Columbus, OH 614-222-6806
Archibald Volt First Month Pledge Washington, DC 721-979-7120

Names 1 - 10 of 10
[+ Add Name](#)
See other names...

Report Filed 31 August 2010

6 Actives	X \$	12.50	= \$	75.00
1 New Initiates	X \$	75.00	= \$	99.00
2 First Month Pledges	X \$	50.00	= \$	100.00
				Total for Month \$274.00

Revised Report

October 2010

7 Actives	x	\$12.50	=	\$87.50		
1 New Initiates	x	\$75.00	=	\$75.00		
				Jewelry upgrade(s)		
				Farrah Khafra	=	\$24.00
2 First Month Pledges	x	\$50.00	=	\$100.00		
				Total for Month \$286.50		

Reconciliation

September 2010	\$12.50
November 2010	\$12.50
Total	\$25.00

Difference from previous report: \$12.50
Reconciliation Total: \$25.00

Total Due: \$37.50

Ship Badges/Certificates To:
Plan 2 months for shipping. No P.O. boxes.

Name: Alpha Rho Chi
Address: 1205 Phryne St.
City: Colletown
State: NT
Zipcode: 78109
 Update Chapter Shipping Address

Additional comment:
Special message for the WGE here

Submit Report

A summary of the previous report for the month appears for reference

The revised totals reflects new roster information

When you make changes, the CRS checks other monthly reports on file and revises them accordingly. You don't need to revise each month's report manually.

The total due reflects just the difference between the new and previous reports.

Shipping information will appear if any initiates are part of the report, even if they were included in a prior version of the report.

When you're done, click "Submit Report"

A summary will appear that you can print out and send with a check if desired. Emails will be sent using the same distribution as an original report.

Review Your Transactions

Similar to a checkbook register, the transactions page provides a running record of reports filed, payments received, and other credits or debts incurred by the chapter with the Grand Council.

Click on the Transactions sub-tab to visit this page

The current school year appears at top.

When reports are filed or edited they appear as new transactions.

The WGE records when payment is received.

Alpha Rho Chi - Chapter Report System (APX-CRS) v1.0 Welcome Test Chapter! | [Sign Out](#)

Chapter Panel | **My Profile**

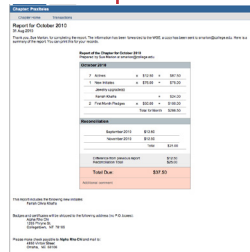
Chapter: Praxiteles

Chapter Home | **Transactions**

Payment History
2010 - 2011 School Year

Date	Description	Owed/Debt	Payment/Credit	Running Total
31 Aug 2010	September 2010 Report 6 Actives, 1 Pledges	75.00		-75.00
31 Aug 2010	Revised September 2010 Report 6 Actives, 1 Pledges	0.00		-75.00
31 Aug 2010	Sept. 2010 Dues Check		75.00	0.00
31 Aug 2010	October 2010 Report 6 Actives, 1 New Initiates, 2 First Month Pledges	274.00		-274.00
31 Aug 2010	November 2010 Report 7 Actives, 2 Pledges	87.50		-361.50
31 Aug 2010	Revised October 2010 Report 7 Actives, 1 New Initiates, 2 First Month Pledges	37.50		-399.00

Click on a link to view the confirmation summary for that report.



The rightmost column displays the chapter's balance over time.

Edit Your Profile

Visit the My Profile tab to change your password or the name and email address associated with your CRS account.

Note: the name and email address in the profile is not linked to the Reporting Contact information on the Chapter Home page.

Alpha Rho Chi - Chapter Report System (APX-CRS) v1.0

Chapter Panel | **My Profile**

Edit Profile | Change Password

My Profile

Account Information

* Username testchapter
 * Password ***** [change password]

Personal Information

* Name/Title Praxiteles Chapter
 * Email Address chapter@praxiteles.org
 * Account Type Chapter
 * Chapter Praxiteles

Save | Cancel

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It is wise to change the password after a change of officers.

This email address is used for "I forgot my password" requests on the login screen.

Click "Save" to record your changes on this page