

Manage Member Login and User Accounts

The following topics are covered in this section. Click on a topic to go to that section.

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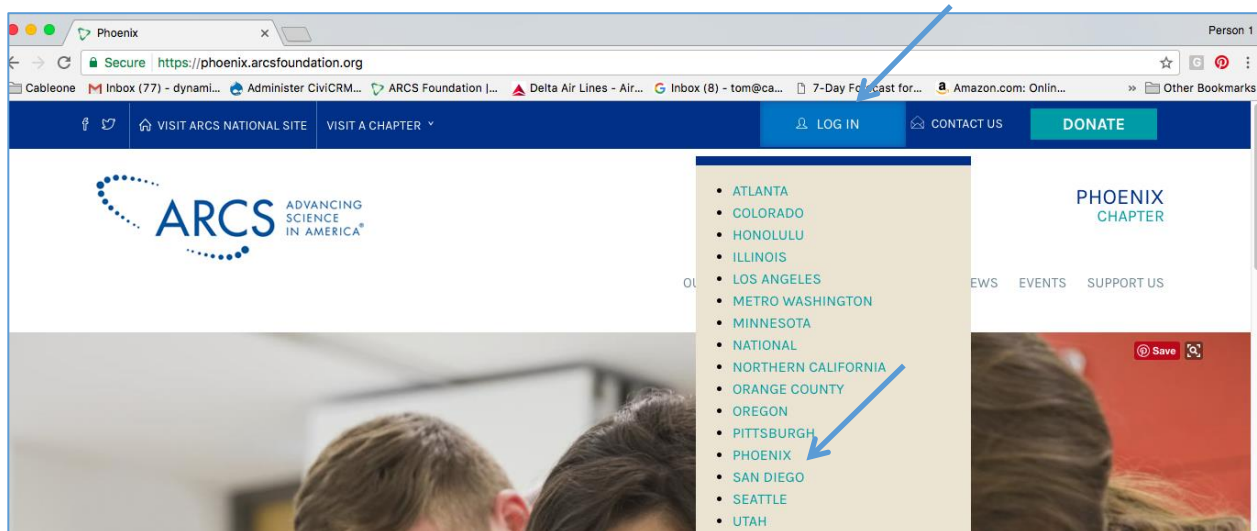
[Update Member User Account Roles](#)

ONLINE MEMBERSHIP RENEWAL INSTRUCTIONS

It may be useful to have these instructions in an email to members, when you are asking them to login to renew their membership. For the sake of demonstration, the Phoenix Chapter is used as an example. This can be modified to meet your Chapter's needs.

Step 1: Go to the Chapter's landing page i.e. phoenix.arcsfoundation.org

Step 2: Select **LOG IN** in the upper right hand corner and then select **Phoenix**.



Step 3: Enter **Username and Password**. Unless otherwise specified, the Username should be the primary email.

Step 4: Select **LOG IN** again. This brings up the **My Portal Welcome page**.

Login to ARCS Phoenix

Username or e-mail address *

You may login with either your assigned username or your e-mail address.

Password *

.....

The password field is case sensitive.

LOG IN

Step 5: If you are an Associate, Active, New Life Member or Honorary Member select **ARCS Membership** from the left hand sidebar.

NOTE FOR EXISTING LIFE MEMBERS ONLY: If you are an Existing Life Member you do not need to select **ARCS Membership** to renew. Instead, select **Member Profile** and **Volunteer Interests and Skills** from the left hand sidebar. Update, as needed, and **SAVE**.

WELCOME

WELCOME

MEMBER PORTAL

HOME

UPCOMING EVENTS

PATS LEARNING PORTAL

DOCUMENT LIBRARY

ARCS MEMBERSHIP

ACCOUNT SETTINGS

MEMBER PROFILE

VOLUNTEER INTERESTS AND SKILLS

DONATE

HELP

Welcome, Mrs. Diane Might, to ARCS Foundation

ARCS® Foundation is a nationally recognized nonprofit 501(c)(3) organization started and run entirely by women who boost American leadership and aid advancement in science and technology. To address the country's need for new scientists and engineers, we provide unrestricted funding to help the country's brightest graduate and undergraduate students create new knowledge and innovative technologies.

- We sponsor talented, motivated American students at top U.S. research universities.
- Nine out of 10 ARCS Scholars after they graduate work in their sponsored fields - creating knowledge, developing technologies, launching start-up companies, inspiring youth.
- Our 16 chapters build industry partnerships to support research important to their own communities.

Current News

Step 6: If not already populated, select your membership type. Membership types can be updated here as well.

2017-2018 MEMBERSHIP RENEWAL CATEGORIES

Membership * Active Member (Phoenix) - \$ 150.00
 Associate Member (Phoenix) - \$ 150.00
 New Life Member (Phoenix) - \$ 5,000.00
 Honorary Member (Phoenix) - \$ 0.00

Additional Donation Amount and/or Credit Card Processing Fee of \$4.00

Email Address *

Member Profile

Step 7: Scroll down and review your **Member Profile** information. Update, as needed. Be sure to scroll to the bottom of the page to complete all queries.

Member Profile

(1) Please review your information and update as needed
(2) Scroll to the bottom and save your information.
(3) If your information does not save correctly, contact is.help@arcsfoundation.org.

Title/Prefix

First Name *

Nickname (if preferred)

Middle Name

Last Name *

Maiden Name (if applicable)

Individual Suffix


Step 8: Scroll to enter your payment information. **Be sure to select the radio button to indicate, if you are paying by credit card or check**

Payment Options


Payment Method * Credit card payment to ARCS Phoenix I will send in payment by check. After final confirmation, please check your email for with payment instructions. If you are an Honorary Member, check here and no payment is necessary.


Credit Card Information

If you have a PayPal account, you can click the PayPal button to continue. Otherwise, fill in the credit card and billing information on this form and click **Continue** at the bottom of the page.

 **PayPal Check out**
The safer, easier way to pay

Save time. Checkout securely. Pay without sharing your financial information.

Card Number * 

Security Code * 

Expiration Date * -month- -year-

My billing address is the same as above

Billing Name and Address

Billing First Name *

Step 9: Scroll to **Volunteer Interests and Skills** to update or fill in your volunteer interests. **Select Confirm Contribution to save information.**

Volunteer Interests and Skills

Committee Interest

Annual Scholar Award Event Communications Event Planning/Management
 Finance Fund Development Fundraising Events/Benefits
 Governance/Policy Hospitality Member Relations
 Nominating Printing Programs/Education/Field Trips
 Publications/Newsletter Public Relations Scholar Relations/Outreach
 Special Events University Relations Website/Computer

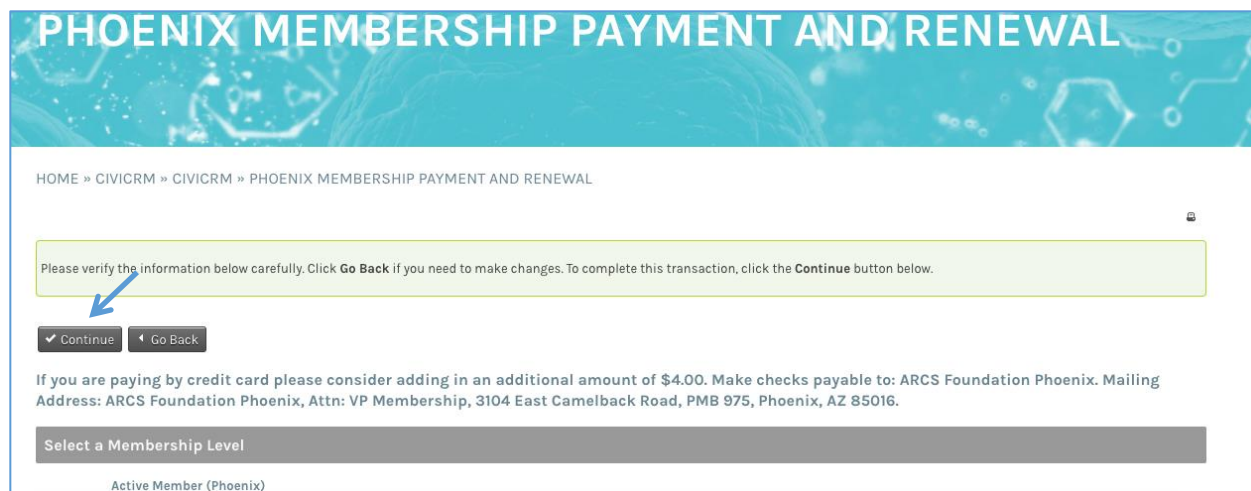
Skills and Interests

Accounting/Budget Planning/Finance Art/Graphics Communications
 Community Connections Database Management Desktop Publishing
 Event Planning/Management Floral Design/Favors/Decoration Fundraising
 Legal Marketing/Public Relations Photography
 Publishing/Printing Sales Special Events
 Strategic Planning Website/Computer Writing/Editing/Proofreading

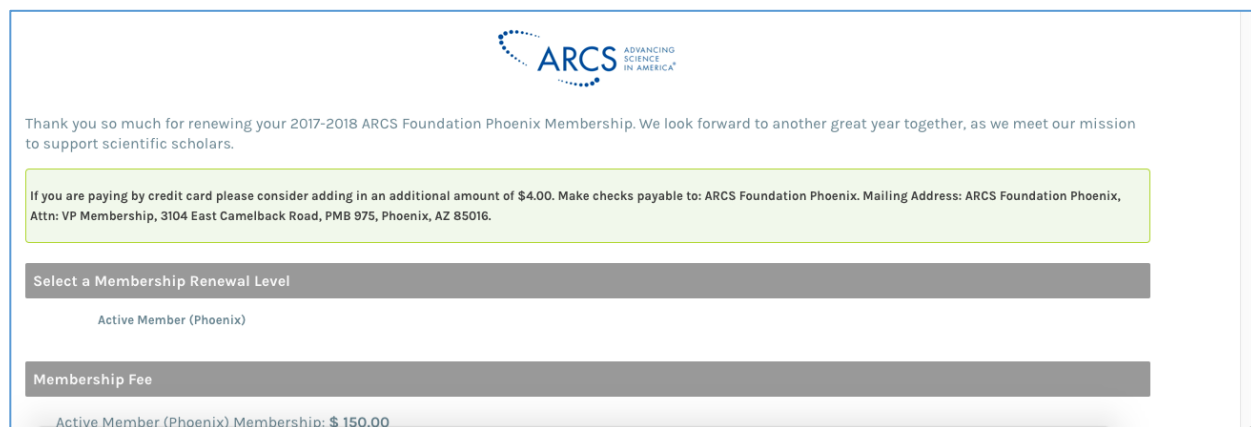
Current or Prior Volunteer Activities and Offices Held

Confirm Contribution

Step 11: Select **Continue** and check to make sure all is okay. Select **Go Back** if corrections are needed.



Step 12: The following screen will appear:



Step 12: Log Out of the ARCS Foundation website when done.

Step 13: Check your email for a **Confirmation Receipt**. If information on the receipt is incorrect, please contact the Data Admin for your site. There is currently an issue saving the **Other Address** and **Phone**, if they are edited or deleted. Please contact your site admin, if your edits do not save correctly. Let them know the correct contact information, so they can update for you.

MEMBER FORGETS PASSWORD/USERNAME

Quite often a member will forget their Username and/or Password and will not want to use the **Forgot Your Password?** login function.

When requested by a member, here's how to assign a new username and/or password.

Step 1: Login

Step 2: Select **People**

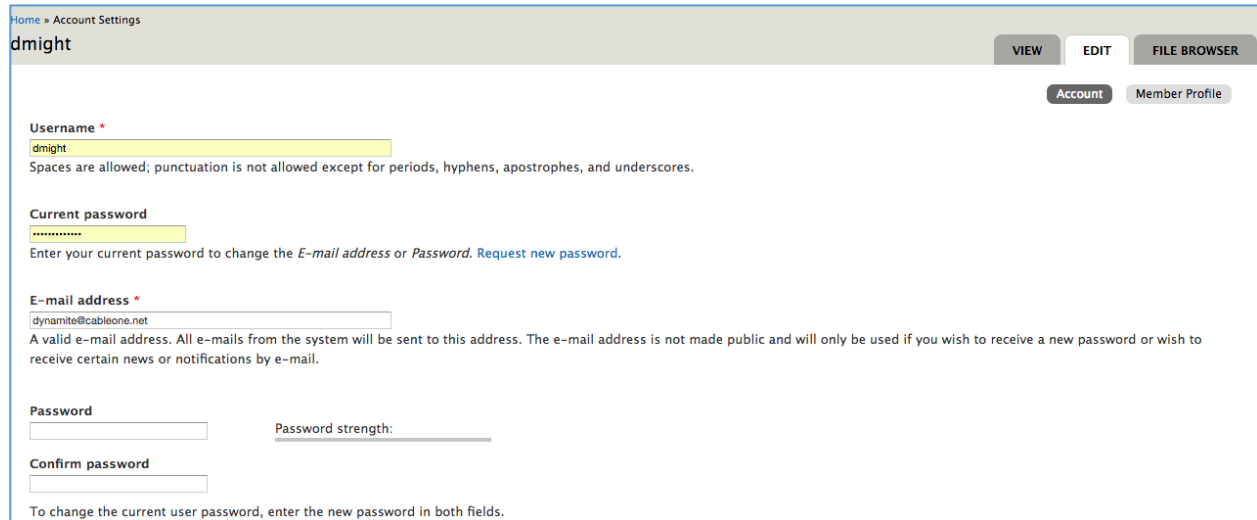
Step 3: Enter the **primary email** that is on their contact record.

Step 4: Select **Apply**

Step 5: Select **Edit**

Step 6: Enter the new **Password**. If needed, the email and username can also be updated. **Be sure to SAVE!!!!**

Note: After selecting **Edit** above, the username and email populates automatically. The username needs to be exactly the same as the primary email on their contact record. To keep it simple, the password can be assigned as their last name with the #1 after i.e. Might#1, Ponce#1, Bray#1, etc. This works well in PHX and most members choose to keep this password. They can choose to keep this password or at a later date change on their login welcome page under “**Account Settings.**” **Do not forget to SAVE at the bottom!**



The screenshot shows the 'Account Settings' page for a user named 'dmight'. The page has a header with 'Home » Account Settings' and 'dmight'. There are three tabs: 'VIEW', 'EDIT', and 'FILE BROWSER', with 'EDIT' being the active tab. Below the tabs are two buttons: 'Account' and 'Member Profile'. The main content area contains several form fields: 'Username' (with a red asterisk) containing 'dmight', 'Current password' (with a red asterisk) containing a masked password, 'E-mail address' (with a red asterisk) containing 'dynamite@cablone.net', 'Password' (with a red asterisk), and 'Confirm password' (with a red asterisk). There is also a 'Password strength' indicator. A note at the bottom of the form states: 'To change the current user password, enter the new password in both fields.'

Optional: To double check that the login works, log out of your account and login using the new member’s username and password. The welcome message should be to that member. Be sure to log out of the new member’s account.

CREATE NEW MEMBER USER ACCOUNT

A user account needs to be created in order for a new member to login. After the account is created, an email can be sent by the VP Membership or Website Administrator with information on how to login, update member profile, pay dues online via credit card, and any other pertinent new member welcome information. This trains new members to be comfortable with using the website from the start. Follow-up with website training at the new member orientation, as needed.

Step 1: Login > People > Add User > + Add User in blue at top of page

Step 2: Fill in the new member’s username and password. If they already have a **Contact Record**, the username needs to be exactly the same as the primary email on their contact record. The password can be assigned as their last name with the #1 after i.e. Might#1, Ponce#1, etc. If the name is three letters or the same as another member, use initials. They can choose to keep or change this password at a later date on their login welcome page under **Account Settings.**

Home » Administration » People

People

LIST PERMISSIONS

This web page allows administrators to register new users. Users' e-mail addresses and usernames must be unique.

Username *

 Spaces are allowed; punctuation is not allowed except for periods, hyphens, apostrophes, and underscores.

E-mail address *

 A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

Password * Password strength:


Confirm password *

Provide a password for the new account in both fields.

Step 3: Check the role as **General Member**. Do **NOT** check **Notify user of new account** as this will cause confusion. This should be done via a personal welcome email from the VP Membership with login instructions and/or at the new member orientation. Fill in the exact **First Name** and **Last Name** that is on their contact record. Do **NOT** check **Can Access Financial Files**.

Roles

authenticated user

General Member 

Scholar


Board Member

Site Admin

System Admin

Super Administrator

Notify user of new account

Name (First and Last) 

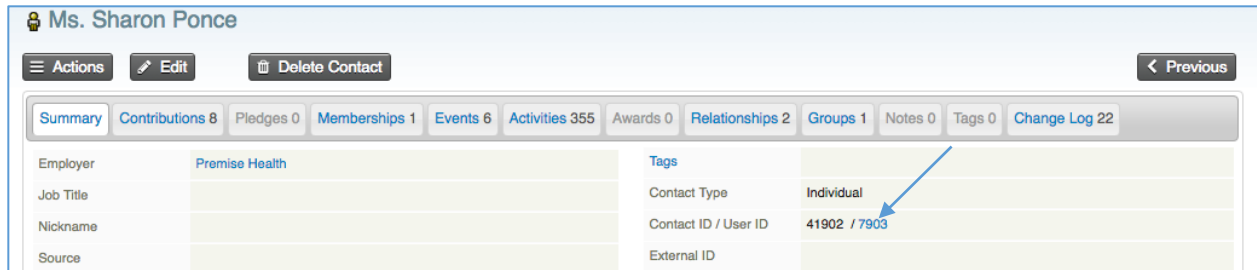
First Name *

Last Name *

Can Access Financial Files

Step 4: The **Domain Access** should already be populated as the Chapter i.e. **Phoenix**. Once all data is entered correctly, select **Create new account** at the very bottom of the page. A message appears that the user account has been created.

Step 5: Search and find the new member's **Contact Record**. There should be a blue **User ID** number. See arrow on screenshot below. If not, notify is.help@arcsfoundation.org. This may mean that there is a duplicate record and a merge needs to be done.



Step 6 (optional): To double check that the login works, log out of your account and login using the new member’s username and password. The welcome message should be to that member. Be sure to log out of the new member’s account, when done.

Update Member User Account Roles

Annually, the VP Membership or the Website Administrator needs to make sure all member user account roles are updated. This is important because it determines permission levels and controls what information members can access. Site Admins need to be limited to only those with specific roles, who do data entry, and have been trained. Some site Admin roles may need to be temporarily assigned based on the task at hand.

Have the following information available before updating member user account roles for the upcoming fiscal year:

- New Chapter Members
- Resigning Chapter Members
- Deceased Chapter Members
- Returning Chapter Board and Honorary Members
- Resigning Chapter Board and Honorary Members
- New Chapter Board Members
- Chapter Board Member Positions
- Chapter Roster with Emails or General Member Export with Emails (**Go to CivCRM > Search > Find Contact > chapter prefix_General Member Group > Search > Print or have Chapter Roster Available**)

CAUTION: DO NOT EDIT NATIONAL IS SITE ADMIN USER ACCOUNTS THAT ARE MIXED IN WITH YOUR CHAPTER ACCOUNTS!!!! WHEN IN DOUBT LEAVE ALONE THESE USER ACCOUNTS AND ASK IS.HELP@ARCSFOUNDATION.ORG BEFORE ANY FURTHER ACTIONS ARE TAKEN!!

Cancel User Accounts of Resigning and Deceased Members

Step 1: Login

Step 2: Select **People** on black line

Step 3: Select **Role: General Member**

Step 4: Select **Domains** i.e. **Phoenix**

Step 5: Select **Apply**

Step 6: Select **Name** in the column heading to alphabetize emails and more easily find members who are resigning.

Step 7: Go down list and check the box in front of the email of a resigning member.

<input checked="" type="checkbox"/>	patricia.elder@... pat@eldercpa.com	Yes	<ul style="list-style-type: none">• General Member• Site Admin	6 years 8 months	4 months 1 week ago	edit Cancel account
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Step 8: Select **Cancel Account** at end of row.

Step 9: Repeat until all resigning members have been canceled.

Home » orourkeej@cox.net

Are you sure you want to cancel the account *orourkeej@cox.net*?

When cancelling the account

Disable the account and keep its content.

Disable the account and unpublish its content.

Delete the account and make its content belong to the *Anonymous* user.

Delete the account and its content.

Require e-mail confirmation to cancel account.
When enabled, the user must confirm the account cancellation via e-mail.

Select the method to cancel the account above. This action cannot be undone.

Step 9: Select **Cancel account**

Update User Accounts of Chapter Board Member Going Off the Board

Step 1: Login

Step 2: Select **People** on black line

Step 3: Select **Role: General Member**

Step 4: Select Domain i.e. **Phoenix**

Step 5: Select **Apply**

Step 6: Select **Name** in the column heading to alphabetize emails and more easily find Chapter Board members going off the Board.

Step 7: Check the box in front of the email of a Chapter Board Member going off the Board.

<input type="checkbox"/>	jlawson3121@cox.net jlawson3121@cox.net	Yes	<ul style="list-style-type: none">• Board Member• General Member• Site Admin	6 years 8 months	8 months 3 weeks ago	edit Cancel account
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Step 8: Select **Edit** at end of row. Remove from any Board Member or Admin roles. In the case below, uncheck both the Board Member and Site Admin role. **Be sure to select Save at the bottom of the page.**

Roles

- authenticated user
- General Member
- Scholar
- Board Member
- Site Admin
- System Admin
- Super Administrator

Step 9: Check to make sure the roles are correct after updating the role(s).

<input type="checkbox"/>	jlawson3121@cox.net jlawson3121@cox.net	Yes	• General Member	6 years 8 months	8 months 3 weeks ago	edit Cancel account
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Step 10: Repeat for each member going off the Chapter Board.

Update User Accounts of New Chapter Board Members

Step 1: Login

Step 2: Select **People** on black line

Step 3: Select **Role: General Member**

Step 4: Select Domain I.e. **Phoenix**

Step 5: Select **Apply**

Step 6: Select **Name** in the column heading and use arrow to alphabetize and more easily find Board users.

Step 7: Check the box in front of the email of a new Chapter Board Member.

<input type="checkbox"/>	marciajobe@yahoo.com marciajobe@yahoo.com	Yes	• General Member	1 year 2 months	9 months 1 week ago	edit Cancel account
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Step 8: Select **Edit** at end of row. Add Board Member and any Site Admin roles that might apply based on their Board Member position. In the case below, add Board Members.

Roles

- authenticated user
- General Member
- Scholar
- Board Member
- Site Admin
- System Admin
- Super Administrator

Step 9: Check to make sure the roles are correct after updating the role(s). **Be sure to select Save at the bottom of the page.**

<input type="checkbox"/>	marciajobe@yahoo.com marciajobe@yahoo.com	Yes	• Board Member • General Member	1 year 2 months	9 months 1 week ago	edit Cancel account
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Step 10: Repeat for each member new Chapter Board member.

Update User Accounts of Site Admins that Need Role Removed

Step 1: Login

Step 2: Select **People** on black line

Step 3: Select **Role: Site Admins**

Step 4: Select Domain i.e. **Phoenix**

Step 5: Select **Name** in the column heading and use arrow to alphabetize and more easily find Site Admins.

Step 6: Check the box in front of the names of **Site Admins** that need role removed.

Step 7: Go to **Operations** and select **Change user roles**

Step 8: Select **Execute**

Step 9: Remove **Site Admin Roles** from the selected users

Step 10: Select **Next**

Step 11: Select **Confirm**

Update User Accounts of Site Admins that Need Role Added

Step 1: Login

Step 2: Select **People** on black line

Step 3: Select **Role: General Member**

Step 4: Select Domain i.e. **Phoenix**

Step 5: Select **Name** in the column heading and use arrow to alphabetize and more easily find Site Admins.

Step 6: Check the box in front of the names of **Site Admins** added.

Step 7: Go to **Operations** and select **Change user roles**

Step 8: Select **Execute**

Step 9: Add **Site Admin Roles** from the selected users

Step 10: Select **Next**

Step 11: Select **Confirm**

Note: When done select the role of General Member and Phoenix to review to make sure roles are correct. Also review Site Admin roles and make sure only members that that require it and have had training are selected. Typical roles that would require Site Admin are: Membership, University Relations, Treasurer/Assistant Treasurer, President/Past President, Web Master, Alumni Scholar Relations, Newsletter, Communications.