

## Entering Local Unit Officers and Members Into OMDR

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 confirmation 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.

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

1. Go to <https://www.pta.org/omdr>.
2. Enter your username and password.
3. Click “Add Local Members (Batch Upload).”
4. Click Browse to find your saved file (**see Creating Files for Upload below for instructions on properly creating and saving file**).
5. Locate your saved file and click “open” – file path will then appear in “file” box.
6. Click upload.
7. Wait approximately 15 minutes for data to appear in database.
8. 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).

## **Creating Files for Upload**

National PTA requests that files submitted for upload be 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 22 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
LUPCO	Co-Local Unit President
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
VPELECT	Vice President-Elect

### Field 21 - Begin Date

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

### Field 22 - End Date

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

## Creating Files for Upload with Microsoft Excel

1. Enter data in Excel spreadsheet set-up to include the fields indicated above in the specified order.
2. Choose "file=>save as" from the drop down menu.
3. In the "Save As" dialogue window enter an appropriate "File Name" for the upload file and select "CSV (comma delimited) (\*.csv)" from the "Save As Type" drop-down list.
4. Close your newly created file.
5. **After saving and closing your file, the final step is to rename your file as a text file according to the next three steps.**

6. Go to Windows Explorer or “My Computer” and locate the file you just created.
7. Right click on that file and choose “rename”.
8. Change the end of the file name from “csv” to “.txt”.

NOTE: When using Microsoft Excel, upload a comma delimited file (\*.csv). When uploading a comma delimited file, do not embed commas in any of the data fields (addresses, names, etc.). Also note that if your data source is an Excel spreadsheet, then none of the entries can take up more than one row on the spreadsheet. All the data for a member must be on a single row.

### **Testing the ASCII Text File**

To test your upload file to verify that a valid ASCII file has been created:

1. Select the Notepad application. (Don't use WordPad, which will open some Word files.)
2. When Notepad opens, open your upload file.
3. You will see that your data is separated by commas.
4. If your file will not open or you get an "Incompatible File Format" error or other such message you must recreate the file.

### **Creating Files for Upload with Microsoft Access**

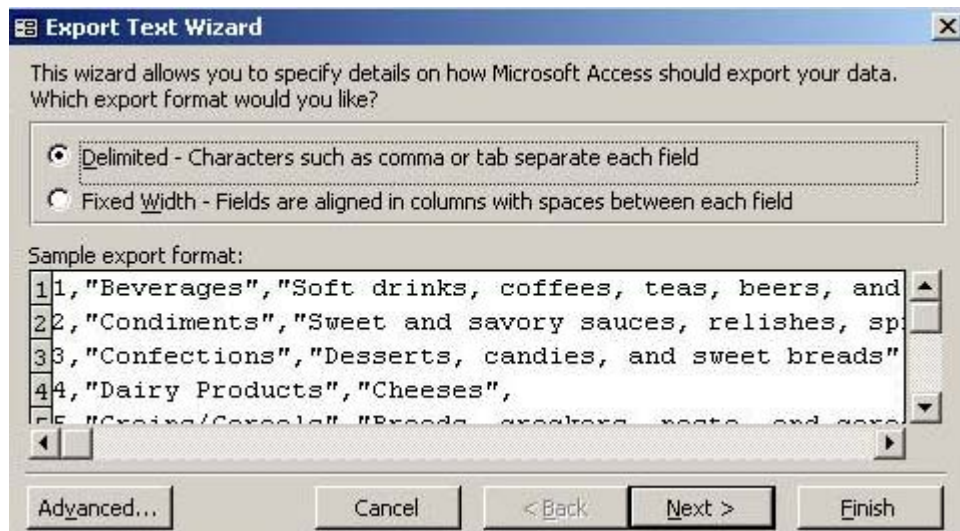
In Microsoft Access, to create and save export specifications, follow these steps:

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.)

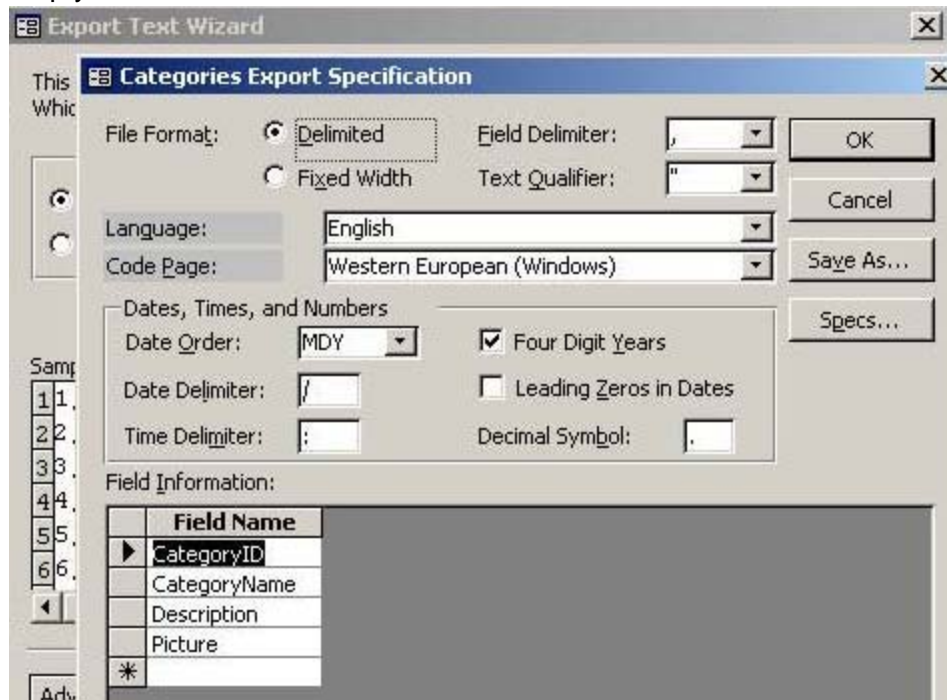


5. This opens the Export Text Wizard. Note that the example used is the Northwind Database.

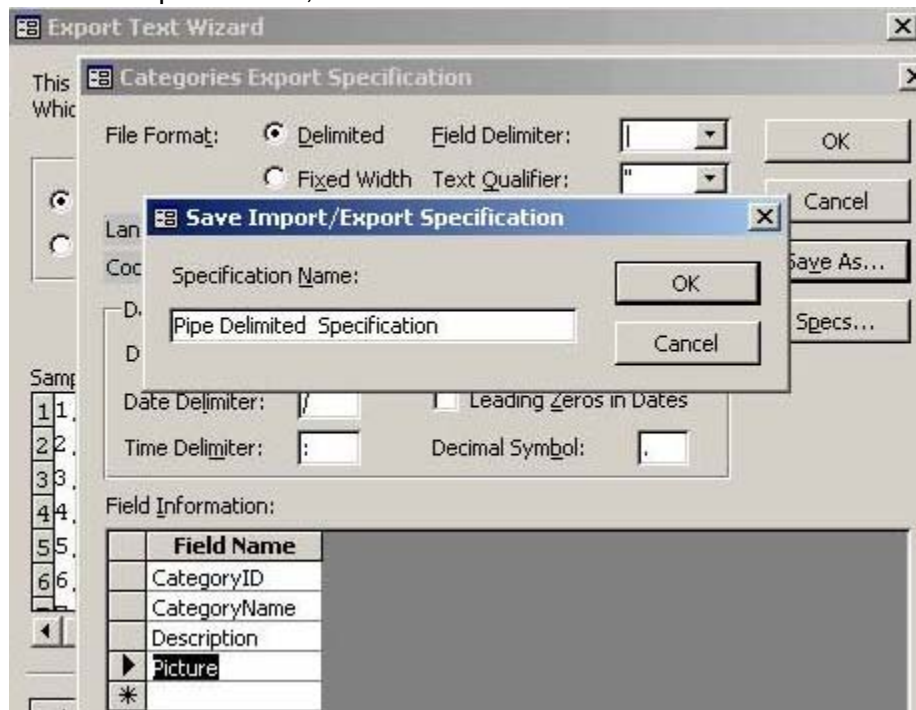


6. In the Export Text Wizard, click "Advanced."
7. In the "Categories Export Specification" dialog box, change the "Field Delimiter" from the comma (,) to the pipe character (|). Also change the "Text Qualifier" from double quotes (") to a blank or

empty field.



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



10. Those settings are now saved.