

PTA's Online Membership Data Reporting System (OMDR)



User's Manual for Local Unit Leaders

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OMDR Local Unit Leader Manual

Table of Contents

Accessing Online Membership and Dues Reporting System for the First Time	Page 3
Sample Excel Spreadsheet	Page 4
Entering Local Unit Officers and Members Into OMDR	Pages 5-12
Downloading Local Unit Membership List	Page 13
Printing Membership Cards	Pages 14-15

Accessing Online Membership Data Reporting System (OMDR) for the First Time

Note: Initial access to a local unit's OMDR site is given to the local unit president. To access OMDR the first time, the local unit president needs his/her local unit ID number and member ID number. These numbers will be provided by the state PTA. If you have not received these numbers please contact your state PTA.

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 and signing on.

Note: As local unit president, it is possible that you will not be the primary person within your unit in charge of using OMDR. In many cases, the membership chair, 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.
2. Provide your username and password to any other individuals within the unit who have been authorized to use OMDR.

Sample Excel Uploading Template

Local Unit Id Number	Name Prefix	First Name	Middle Name	Last Name	Suffix	Address 1
00004739		Fred		Schwartz		541 N. Fairbanks Ct.
00004739		Linda		Johnson		21 Main St.

Address 2	Address 3	City	State	Zip	Home Area Code	Home Phone	Work Area Code
		Chicago	IL	60611	555	5555555	
Apt. 200		Chicago	IL	60611	312	1234567	312

Work Phone	Fax Area Code	Fax Phone	Email	Position	Begin Date	End Date
			fschwartz@pta.org	MBR	07/01/2007	06/30/2008
7654321			linda@pta.org	MBR	07/01/2007	06/30/2008

Entering Local Unit Officers and Members Into OMDR

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

8. Go to <https://www.pta.org/omdr>.
9. Enter your username and password.
10. Click "Officer Entry Screen."
11. 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.
12. 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.)
13. 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 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
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

Field 23 – Member ID Number

Optional. 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 Excel

1. Enter data in Excel spreadsheet set-up to include the fields indicated above in the specified order. **DELETE THE HEADER ROW of the Excel file.**
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.

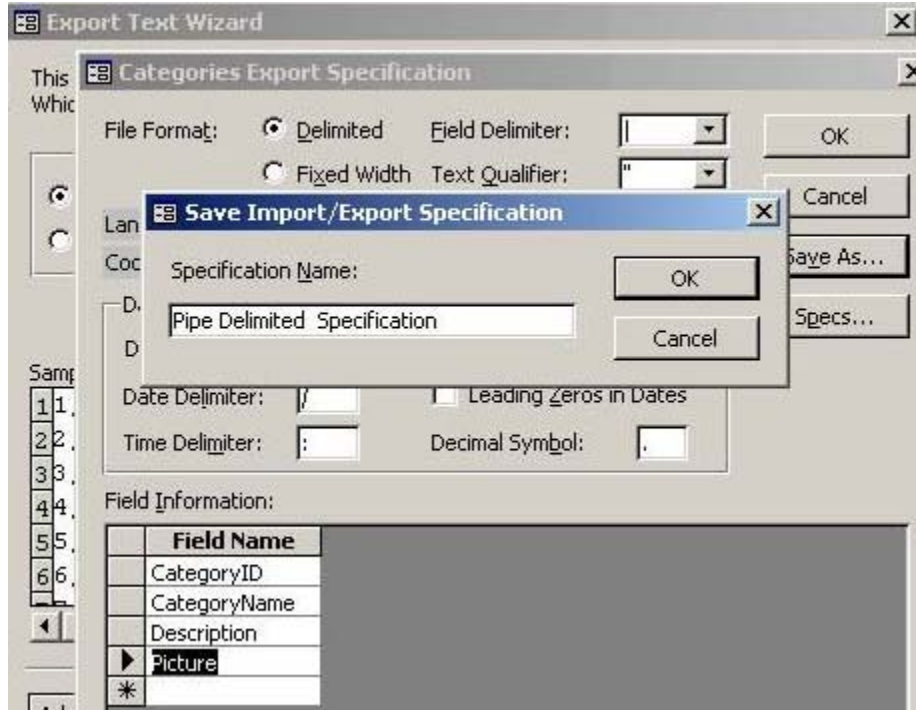
Creating Files for Upload with Microsoft Access

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.)



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



10. 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 your PTA 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.

First Steps:

- 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.

A., Franklin
B., Schroeder
Boop, Betty
Brown, Charlie
Brown, Sally
Clark, Ann
Clark, Lee *
Coxhead, Steve *
Donovan, Jan
E., Marcie
James, Woodstock
Jean, Peggy
Loew y, Al
M., Pigpen
Patty, Peppermint
Paw low ski, Paula *
Sw anson, Linda
Van Pelt, Linus
Van Pelt, Lucy
Van Pelt, Rerun

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.

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.