

IUG Membership System Training

November 8th, 2023

Wes Osborn

Outline

Why we moved to a new system

Why we selected Memberleap

Behind the scenes
improvements

Training on features

Why we moved to a new system

IUG uses organization level members

Previous system was NOT able to fully work with org level members



Lots of manual data syncing

Membership
system


Joomla

Membership
renewal form

Wordpress

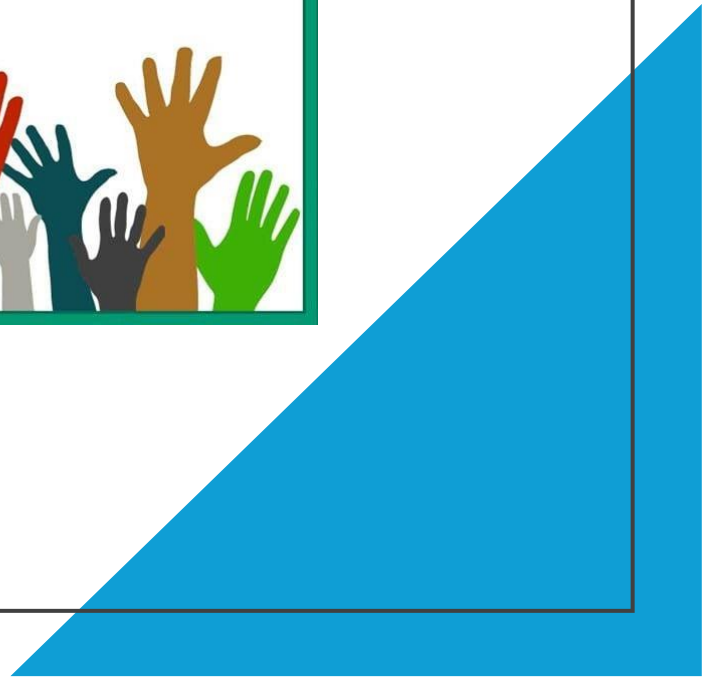
Accounting
software

Newsletter
software

A field of many light-colored umbrellas, with one prominent blue umbrella in the center. The scene is set against a dark, gradient background. The text is overlaid on the lower-left portion of the image.

Everyone made a valiant attempt
to mold an event system into a
membership system

IUG is run
primarily
volunteers



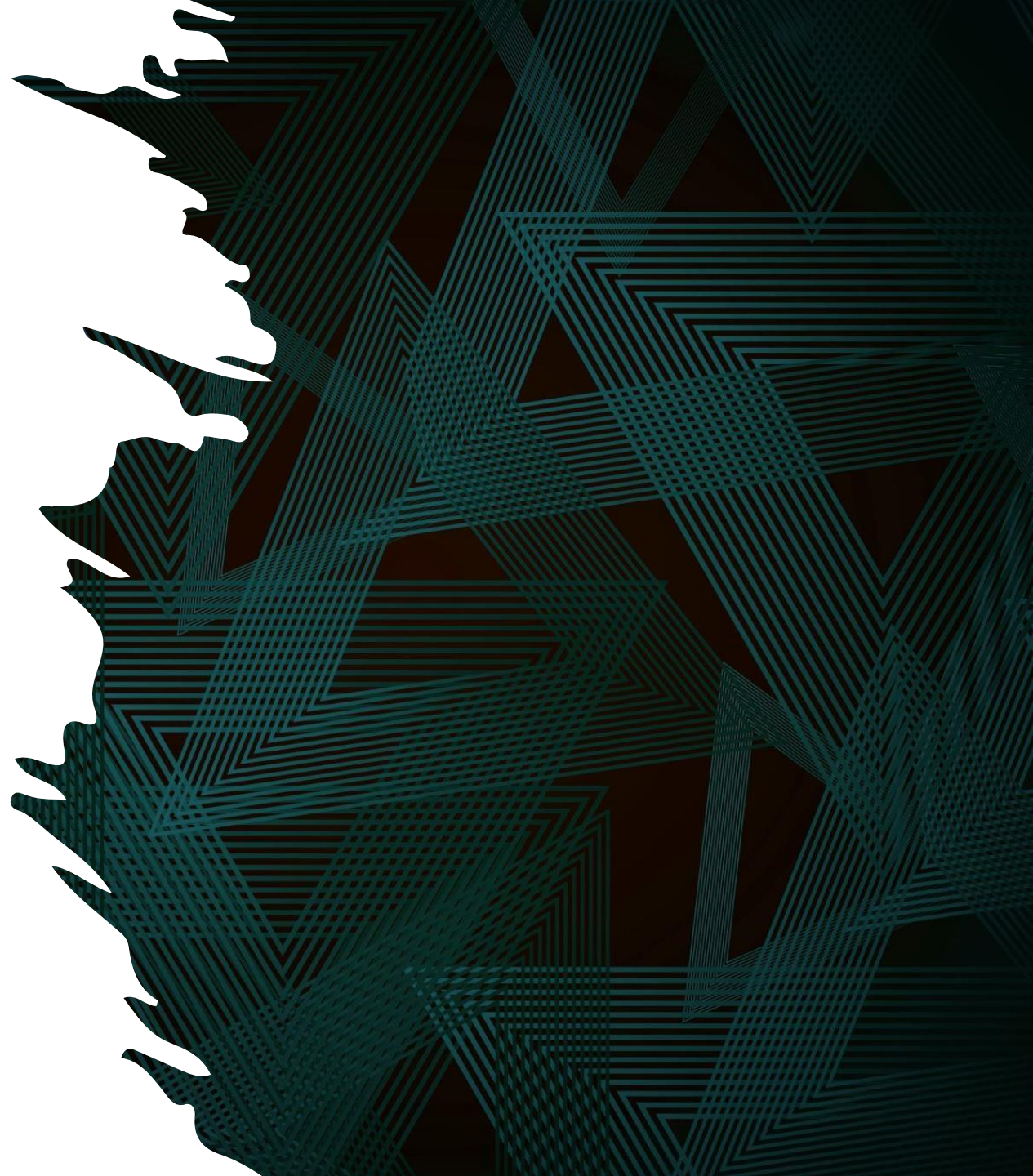
We needed a
solution that made
better use of our
limited time



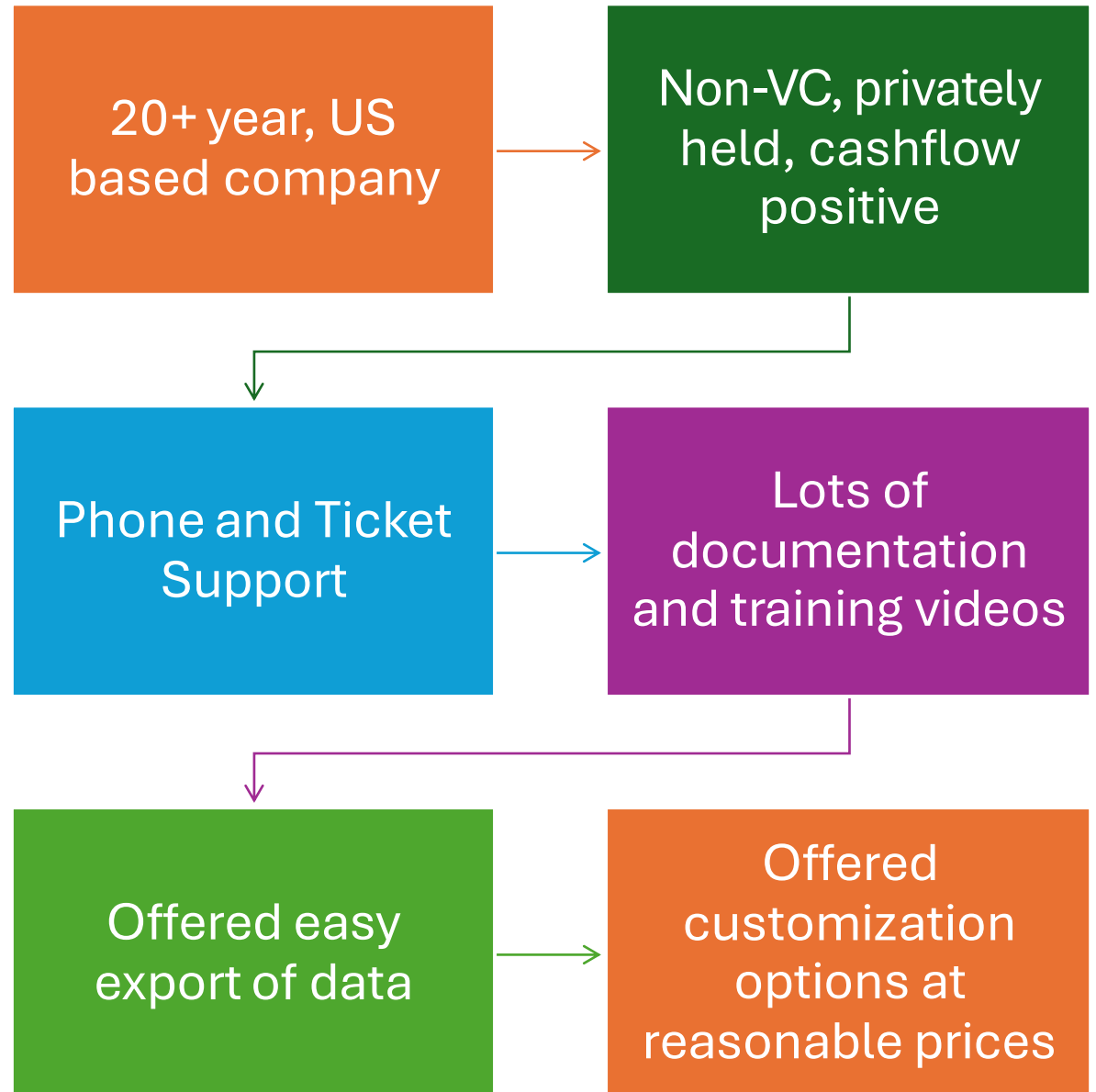


Why did we pick MemberLeap?

They worked with
our organizational
level member type



Other things we liked about MemberLeap



Annual cost of about $1/5$
of what we were paying



We went from this

Membership
system

Joomla

Membership
renewal form

Wordpress

Accounting
software

Newsletter
software

To this with all the functions + more

Membership
system

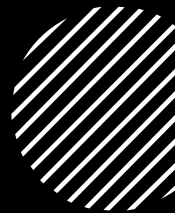
Accounting
software



MemberLeap is a one
stop shop for all
member support
needs of present &
future IUG Steering
Committee members



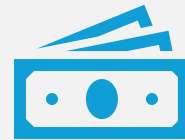
Behind the scenes improvements



Renewal emails being sent by the new system (check SPAM folder)



Less information to fill in during renewals



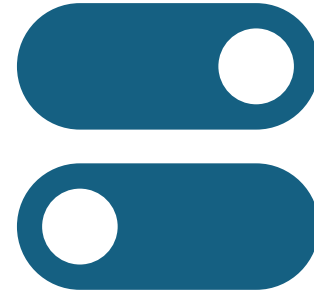
Automatic synchronization of payment information with IUG accounting

MemberLeap training

All screens subject to change!



MemberLeap is like an ILS



Thousands of options

One of the dozens of pages of options just for events

Event Registration Global Configuration

≡ [Main Menu](#) | [Configuration Menu](#)

Use the form below to configure your global event registration settings. Settings enabled below will affect all event registrations. For more information about a particular option, click on the [i](#) icon next to the title.

▼ General Options

- [i](#) **Open Event Registration in New Tab**
- [i](#) **Hide Event Registration in Members Area**
- [i](#) **Show link to history in My Membership section**
(If checked, will show link to report that will display 'hard-linked' (registrations tied by member id to the member) registrations for the given member logged-in.
- [i](#) **Show cancellation link in My Membership section**
- [i](#) **Default to Category View**
- [i](#) **Hide All Unavailable Packages**
- [i](#) **Enable Attendee Check-in Page**
- [i](#) **Enable File Upload Option** will allow you to ask for file uploads from event attendees on a per-event basis

- +
 - • Logging into MemberLeap



Separate from Web Forum login (for now)



[IUG Home](#)

[Profile](#)

[Sign Up](#)

[Log In](#)



Topics

More

Categories

IUG Announcements

Jobs

Polaris

Sierra, Millennium & Encore

all categories ▾

all tags ▾

Latest

Categories

Top

Topic

Replies

Views

Activity

🔒 Welcome to the IUG forum

■ General

The IUG forums use a new interface. It is faster, easier to use, and works great on mobile devices. And you can even go old school and set your account to mailing list mode for an email only experience. Check out #forum-... read more



1

850

Aug '22

Logging in



All membership
accounts migrated



Reset your password
using your email address

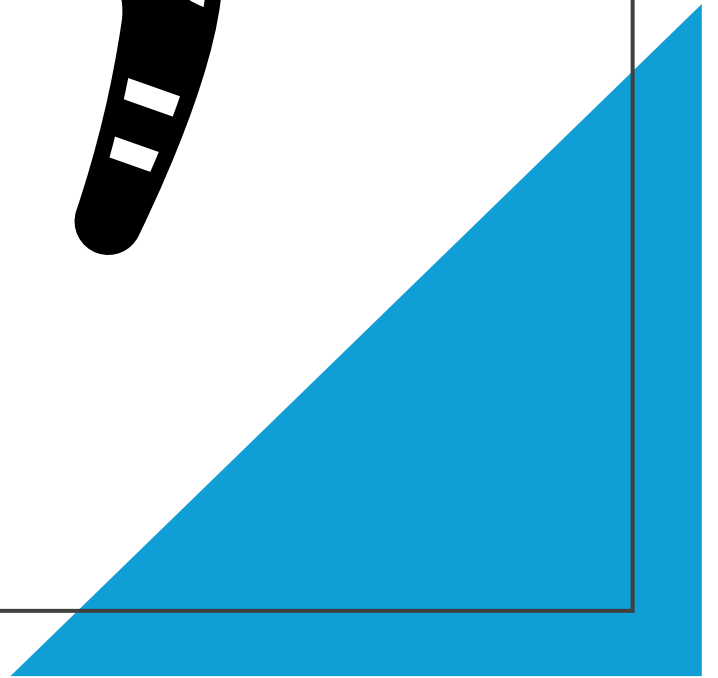
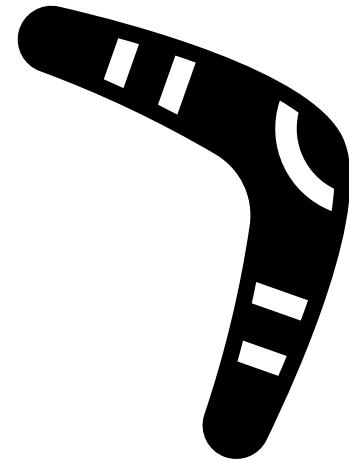


Make sure to check your
SPAM folder



Click the Login button in the upper right-hand of the IUG website (demo)

Returns to
original URL
after login!



We migrated to [a new membership system on 11/1/2023](#). Your login information has changed. Your username is still your **Email Address**.

Please use the [Forgot Password](#) option to reset your password. Please [use this form if you have additional login issues or questions](#).



Use the form link at the top of the page
if you have issues



Check your membership details

Available via the
MEMBERS ONLY
menu

Verify your renew
period

Site contacts:
Add/update
Additional
contacts

Member Menu

Members ▾

Events ▾

Communication ▾

Engagement ▾

Member Number: 1720

Osborn, Wes

1685 W 1st Ave.

Columbus, OH 43212

wosborn@clcoho.org

Current Term: 2/3/2023 - 2/3/2024 (paid)

osborn, wes-test
Contact

cwosborn@gmail.com



Edit

Phone: 614-439-1234
Email: wosborn@clcoho.org

Address: 1685 W 1st Ave
Columbus, OH 43212

Contact

Showing 1 to 9 of 9 entries

Add Contact

[Change Contact/Profile Info](#)
[Additional Individuals Included](#)






Using the member directory

Member Menu

Members ▾ Events ▾ Communication ▾

Member Directory 0



Osborn, Wes
1685 W 1st Ave.
Columbus, OH 43212

Search Criteria:

Keyword Search: osborn

[Click here to Search Again](#)

Central Library Consortium
Wes Osborn



Website: <http://www.clcoho.org/>
[Contact Form](#)



Central Library Consortium
wes-test osborn



[Contact Form](#)



Register for monthly Zoom Forum



Available from a variety of places

IUG Calendar

IUG Membership System Training

Wednesday, 08 November 2023 1:00 pm - 1:45 pm

[See more details](#)

IUG Forum: Year End Acquisitions & Circulation - Polaris

Thursday, 16 November 2023 1:00 pm - 2:30 pm

[See more details](#)

[More events](#)

Member Menu

Members ▾

Events ▾

Communication ▾

Member Number

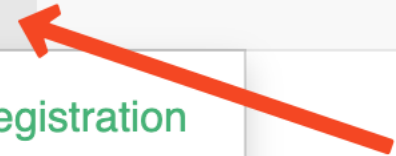
Osborn, Wes

1685 W 1st Ave.

Columbus, OH 43212

[Event Registration](#)

[Calendar of Events](#)



Register for the event

Event Registration

[Register for this Event](#)

My registered Events

IUG Forum: Year End Acquisitions & Circulation - Sierra - 11/16/2023

Portal: [Wes Osborn](#)

Portal: [Kalee Burkett](#)

Find zoom links under the registered Events Portal:

IUG Forum: Year End Acquisitions & Circulation - Polaris - 11/16/2023

Portal: [Wes Osborn](#)

Portal: [Wes Gmail](#)

IUG Forum: Year End Acquisitions & Circulation - Polaris - 11/16/2023

Info

My Info

Select the ^My Info^ tab to see your registration information.

Name: **IUG Forum: Year End Acquisitions - Sierra**

Date/Time: 11/16/23 3:00 PM

Time Zone: Eastern

To Join the Meeting:

<https://us06web.zoom.us/j/81341736103>

Scroll down the page until you find this section, then copy/paste the URL

Meeting ID: 81341736103

Meeting Password is Required:



**Submit your IUG 2024 Proposals
March 25th – 27th Detroit, Michigan**

CONFERENCES



ENHANCEM

About IUG Conferences

Conference Presenters'
Guidelines

IUG Conference Conduct
Statement

IUG 2024



Follow
Instructions
from IUG
2024 Link

Scroll to the bottom of the member page to see Proposal Submission

Proposal Submissions

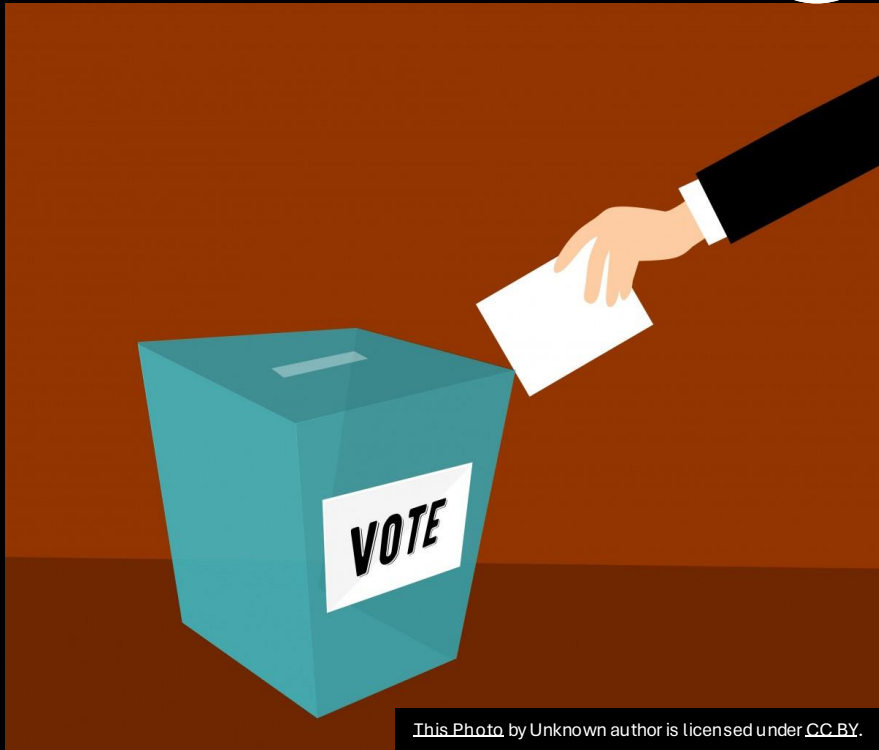


Proposal Scoring

IUG 2024 Conference

General

[2 Submitted for Screening](#)



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Coming Soon IUG Elections



Accepting IUG Steering Committee Nominations

<https://forum.innovativeusers.org/t/1526>



Elections voting only open to **site contacts**

If you are the site contact, you'll have the "Additional Individuals Included" option

You can fill out the [Change of Site contact form](#) if you need to make a change

Coming soon
IUG 2024
Conference
Registration



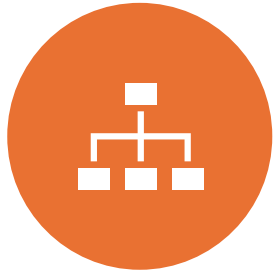
A festive graphic for the New Year. The words "Happy New Year" are written in a large, bubbly, 3D-style font. The letters are a light cream color with a thick, vibrant pink-to-purple gradient outline. The text is set against a white background with several colorful, swirling streamers in shades of orange, yellow, green, and purple. The overall style is bright and celebratory.

**Happy
New Year**

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Enhancements Voting – Coming Next Year

Thanks!



KATHY, IUG BUSINESS
MANAGER



BRYAN, IUG
WEBMASTER



DEREK, IUG SC
MEMBER



SARAH, IUG SC
MEMBER



Questions