IUG Membership System Training

November 8th, 2023
Wes Osborn
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
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

- 20+ year, US based company
- Non-VC, privately held, cashflow positive
- Phone and Ticket Support
- Lots of documentation and training videos
- Offered easy export of data
- Offered customization options at reasonable prices
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 icon next to the title.

<table>
<thead>
<tr>
<th>General Options</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open Event Registration in New Tab</strong></td>
</tr>
<tr>
<td><strong>Hide Event Registration in Members Area</strong></td>
</tr>
</tbody>
</table>
| **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.) |
| **Show cancellation link in My Membership section** |
| **Default to Category View** |
| **Hide All Unavailable Packages** |
| **Enable Attendee Check-in Page** |
| **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)

Welcome to the IUG forum

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
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 Number: 1720

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

wosborn@clcohoio.org

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

Change Contact/Profile Info
Additional Individuals Included
Using the member directory
Search Criteria:

Keyword Search: osborn

Click here to Search Again

Central Library Consortium
Wes Osborn
Website: http://www.clcohoio.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](#)
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

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
Meeting ID: 81341736103
Meeting Password is Required: [redacted]
Submit your IUG 2024 Proposals
March 25th – 27th Detroit, Michigan
Follow Instructions from IUG 2024 Link
Proposal Submissions

Proposal Scoring

IUG 2024 Conference

General

2 Submitted for Screening
IUG Elections

Coming Soon
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
Enhancements Voting – Coming Next Year
Thanks!

KATHY, IUG BUSINESS MANAGER
BRYAN, IUG WEBMASTER
DEREK, IUG SC MEMBER
SARAH, IUG SC MEMBER
Questions