

Members Administration

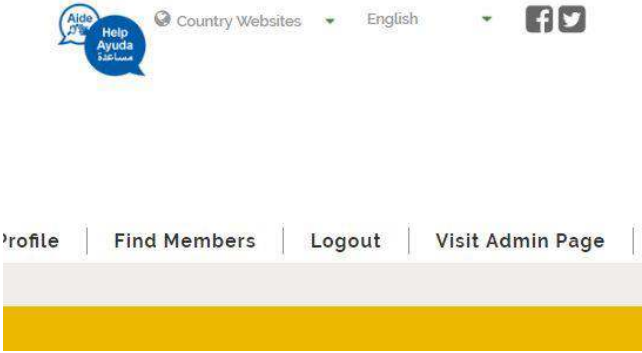
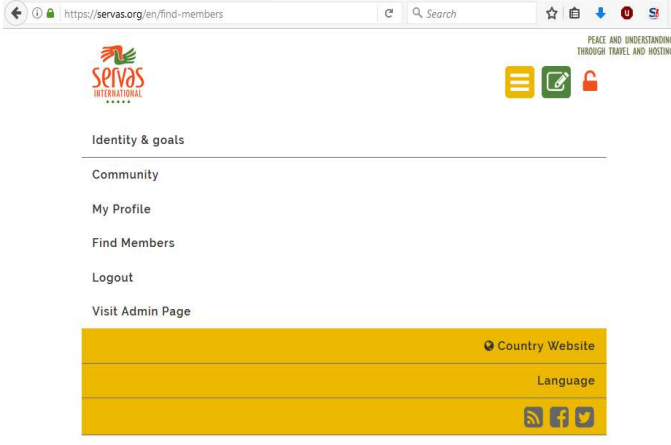

This article will explain how to find specific members or a subset of members, with the option to print or export such a sub-list. It will also explain various other operations that can be done on this list (e.g. printing, saving to PDF, exporting, etc.)

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Reminder: Your screen may look different from the figures here; the view may vary, depending on the device you use (e.g. computer, laptop, phone) or your browser (e.g. Chrome, Safari, etc.).

1. Accessing the Members Administration Page

<p>1. Access the Servas Online site.</p>	<p>https://servas.org/</p>
<p>2. Click on Visit Admin Page</p>	
<p>3. If this option is not available, click on the yellow menu button. 4. Within the menu, select Visit Admin Page.</p>	
<p>5. Click on one of the green, then becoming red [Members Administration] button to access all administrative operations .</p> <p><u>Note:</u> you can click at any time on any of the three green buttons to access the Applications, Renewals, eStamps or Delete inactive members functions. Each of these functions are described in a separate chapter of the admin help.</p>	
<p>6. Once within the Admin area, clicking on the Help (Ayuda/Aide) link in the center of</p>	

the header area will display the list of chapters, one for each Admin activity.



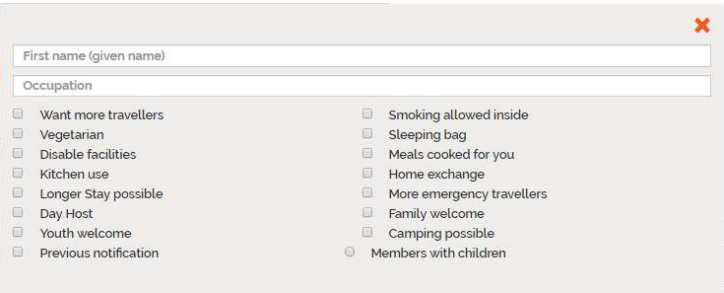
Note: Admin help will only be displayed when clicking the Help link from an Admin page. In other areas, the user help will be displayed.

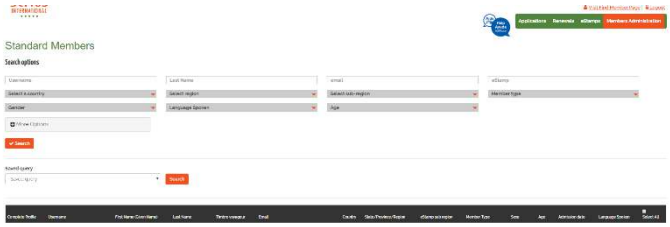


2. Search for a subset of members

You can search for individual members by username, First or Last Name, email address or eStamp number.

You can also try to find them with more general searches such as Country, Region, Sub-region, Member type, Gender, languages, age and additional fields of the user profile.

<p>7. Within Members Administration, you can sort the members list by clicking on the relevant heading (e.g. Member Type). A small arrow within the header will indicate that the list is sorted using this field. The arrow is pointed in the direction of the sort (a downward facing arrow indicates sort by alphabetical order – A to Z, while a downward facing arrow indicates a reverse alphabetic order from Z to A)</p>	
<p>8. You can scroll up and down the list. <u>Note</u>: the list may include multiple pages as indicated below the list (e.g. 1 of 4). Use the arrow to move to the next page (e.g. 2 of 4)</p>	
<p>9. Alternately you can use the various Search options fields to search for the profile of a specific member or a subset of members.</p> <p>10. Click on [More Options] to access additional user profile fields further specifying your search. e.g. to see only Day hosts</p> <p>11. Click the red [X] to save these additional search settings.</p> <p>12. Click the red [Search] button. You can now view the selected subset of members, sorting and scrolling the list as explained above.</p> <p>13. You can add or remove search settings further refining the search.</p>	

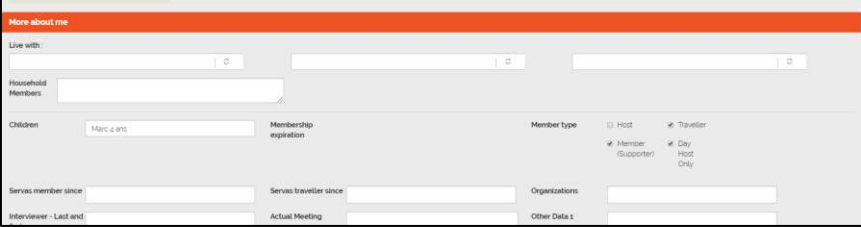
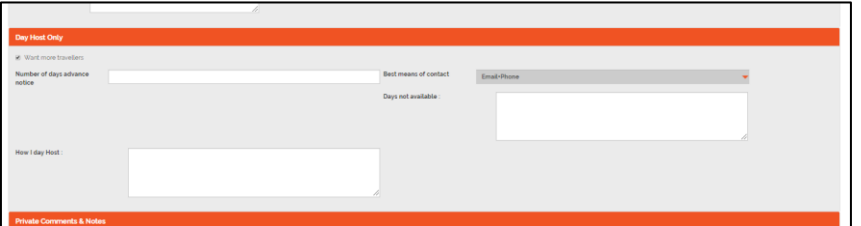
<p>14. To return to the full list, deleting any text you entered. Remove all the search options you used, returning all fields to their original heading text (e.g. Select region instead of the name of a region).</p> <p>Click [+ More Options] button and check that all criteria are de-selected.</p>	
<p>15. The current combination of search options can be saved by typing in a Query name and clicking [Save query]. The message Query saved successfully will appear within a light green area above the list.</p> <p>16. To reuse a previous query, select from the Saved query drop-down menu and clicking the red [Search] button located to the right.</p>	

3. Editing the member profile

Note: The username and email are the key identifiers of a user profile within ServasOnline. This means that there cannot be two profiles using the same email address. As a result, in countries that have decided to have Individual profiles, each member must have a separate email address.

3.1. Switching the member type from full host to a day host only status, or select the member as a Traveller


If the member was a full **Host** and wishes to change to be **Day Host Only**

<p>1. Deselect Host and select Day Host Only.</p> <p><u>Note:</u> The member cannot modify their Member type. They can only view the Member type (s) assigned by the administrator (within the More about Me section of the profile).</p>	
<p>2. As Administrator you can complete the Day Host only section of the member's profile or request that they do it themselves.</p>	

If the member was not yet a Traveller, click in the square case and select the Traveller role, after saving the profile, the member will have a LOI section in the her/his profile.

3.2. Members who can edit their profile

Refer members to **Editing My Profile** within the user help

(Accessed via the  link in the center of the header of any ServasOnline screen).

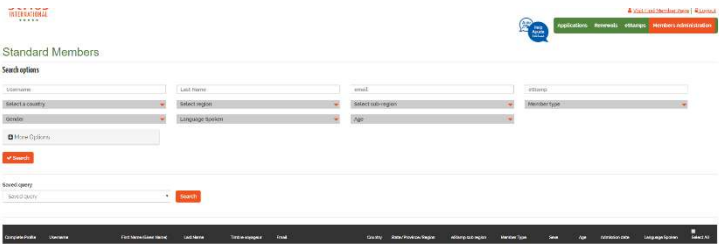

3.3. Members who need help to edit their profile

If the member is unable to edit his/her own profile, a local coordinator can do it for them through the **Complete Profile** screen under **Members Administration**.

Note: **The Membership expiration date can only be updated from the Renewals page.**

The **eStamps** page is used to update eStamp information. It is not relevant for countries using paper stamps.

See the relevant sections of the Admin Help for details related to these tasks.

<p>1. As explained in the Search for a subset of members section above, locate the record for the member.</p>	
<p>2. Click on the “pen” to edit (on the left side). This takes you to the Complete Profile screen, where you can edit almost everything in the profile (except the photo and the visibility settings which the user will have to update).</p> <p>3. Update the profile as necessary. For explanation of the various fields within each section of the profile, see user help.</p> <p>4. Click [Save profile]</p>	

Letter of Introduction for the Traveller member

Basic Information and More about me for all the members

Hosting section for Host member

Or Day Hosting section for the Day Host Only members

After modifications, don't forget to Click on **[Save profile]** at the bottom of the screen

The screenshot displays the 'Complete Profile' form, which is organized into several sections:

- Letter of Introduction:** Includes fields for 'Personal background' (with a text area and a 'Show more' link), 'Other Service travelling with you' (with a dropdown), and 'Emergency contact' (with a name and phone number field).
- Basic Information:** Contains fields for 'First Name', 'Last Name', 'Birth year', 'Age', 'Gender', 'Email', 'Phone', 'Mobile', 'Home City', 'Country', 'State/Region', and 'Sub Region'. It also features a 'Language' selection panel with 'Sign up', 'Change a language', and 'Delete a language' options.
- How to get food:** A section with a 'How to get food' dropdown and a 'Form of food' field.
- Current Address:** Fields for 'Current Address', 'Postal Code', 'City', and 'Country'.
- More about me:** Includes 'User info', 'Household Members', 'Children', 'Service Member' (with 'Actual Service' and 'Other Units'), and 'Travelled in' (with a 'More information/self description' link).
- Hosting:** A section for 'Holiday periods' (with 'Host' and 'Guest' options), 'Number of days', 'Best means of contact', and various checkboxes for 'Family welcome', 'Meal welcome', 'Pet welcome', 'Alcohol welcome', 'Smoking allowed', 'Camping allowed', and 'Day Host'.
- Private Comments & Notes:** Fields for 'Service Key Use' and 'User Notes'.

A 'Save profile' button is located at the bottom left of the form.

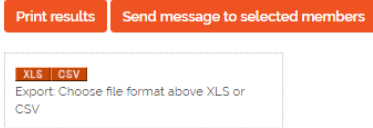
5. Select one or more of the following values for **Member type**

- **Traveller** - will create an LOI section in the member profile
- **Host** - will create a Hosting section in the member profile
- **Day Host Only** - will create a Day Hosting section in the member profile

4. Printing member lists

You can print a list of all member profiles or a partial list of members. The list is saved as a PDF file on your computer. Once saved, you can print the list or view it.

1. Use the Search options fields or the fields within **[+ More Options]** to see a subset of members.
2. To select a full list of all members in the currently displayed page, click on the little white box in the table heading **Select All** (the leftmost column heading). You can see that all the members on this page are now selected.
3. To add the members on other pages, scroll the pages and click **Select All** on those pages as well.
4. To select only some of the members shown in the table, add a check mark in the box at the end of the listing of each member.

<p>5. Scroll down to the bottom of the list and Click [Print results].</p>	
<p>6. In the Save As dialog, select the directory within which the list is to be saved. You might want to select the Desktop so it will be easy for you to find the list.</p> <p>7. In the File name field, you will see the default file name Member-list. When additional sub-lists are saved, a serial number will be added to this name e.g. Member-list (1). You can modify this name. See note below for considerations when selecting the file name.</p> <p>8. The Save as type field indicates that the list will be saved as an Adobe Acrobat Document.</p> <p>9. Click [Save].</p>	

Note: we recommend that the file name reflect the sub-list being printed.

For example, if you are saving a sub list, we recommend updating the **File name** in order to clearly identify

the sub-list being created. If you use the same filter again, the current date should be added to the sub-list file name.


(e.g. to indicate that the sub-list contains only Day Hosts and was created on a certain date, you might want to use the name **Day Host Member-list 23 April 2019**).

If you select Day Host, the list will return the Day Host Only AND the “Host also available as Day Host”

WARNING: When you have selected some members in the list **don’t click on the bottom right red Button [Deactivated selected]**. If you do by mistake, all the members selected will be deactivated and you will have to reactivate them with Applications / Deactivated members, select them with the pen, [**Admitted**] and [**Save**]

5. Exporting member lists

The list of the currently selected members can be exported as a .CSV file or as an Excel spreadsheet (.XLS).

<p>10. Select the members whose profile is to be exported by using the Search options as explained above, or export the full list</p>	
<p>11. Scroll down to the bottom of the list. Click [XLS] or [CSV] as relevant.</p>	
<p>12. Creating the list will take time so be patient. The message Building export might appear if building the list takes too long.</p> <p>13. Data export successful will be displayed in green above the Search options fields when the file is ready.</p>	

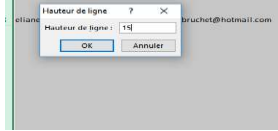
<p>14. The Save As dialog will be opened showing the relevant Save as type. As explained above, if you are exporting a sub-list, we recommend updating the File name in order to clearly identify the list being exported and the date.</p> <p>15. You can modify the default filename which, by default, includes the current date.</p> <p>16. Click [Save].</p>	
<p>17. Click on the button showing the name of the .xls or .csv file.</p> <p>See instructions below regarding Adjusting the format of the exported Excel file and Adjusting the format of the exported CSV file.</p>	
<p>18. Click on the red</p>	

<p>Return to previous page option to see the list.</p>	
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5.1. Adjusting the format of the exported Excel file

<p>19. For Excel files, You can click on this button to open it with Excel (or go on Download directory if the button is not visible)</p> <p>20. If you see a warning telling you the file could be damaged and could be at risk, you can ignore the warning and confirm opening the file by clicking [Yes].</p>	
<p>21. Click on the arrow in upper left corner of the table in order to select the full list.</p> <p>22. To modify the formatting of the rows (for example, the row height), right click in the left part of any row to see the menu and then select the</p>	

relevant option.
Enter the value
as required (e.g.
row height of 15
or 1 cm...) and
click **[OK]**



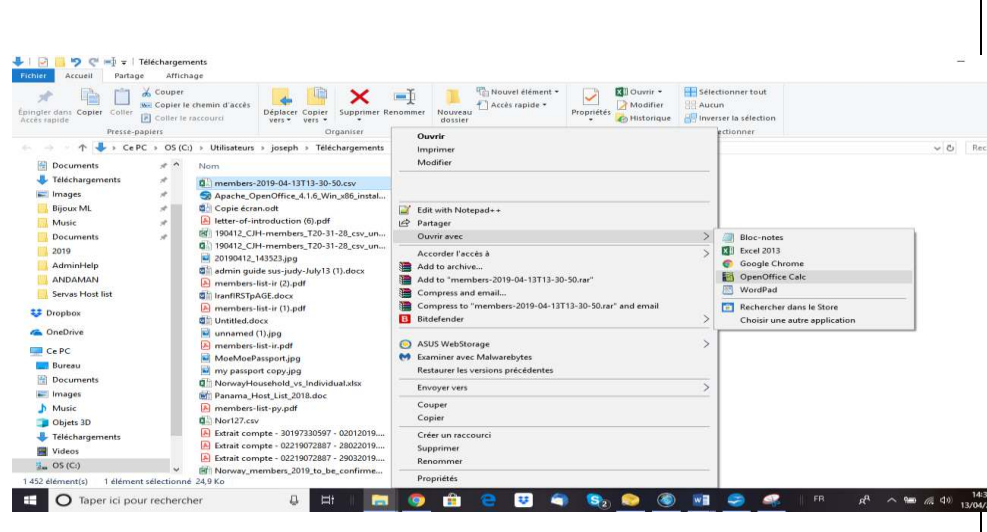
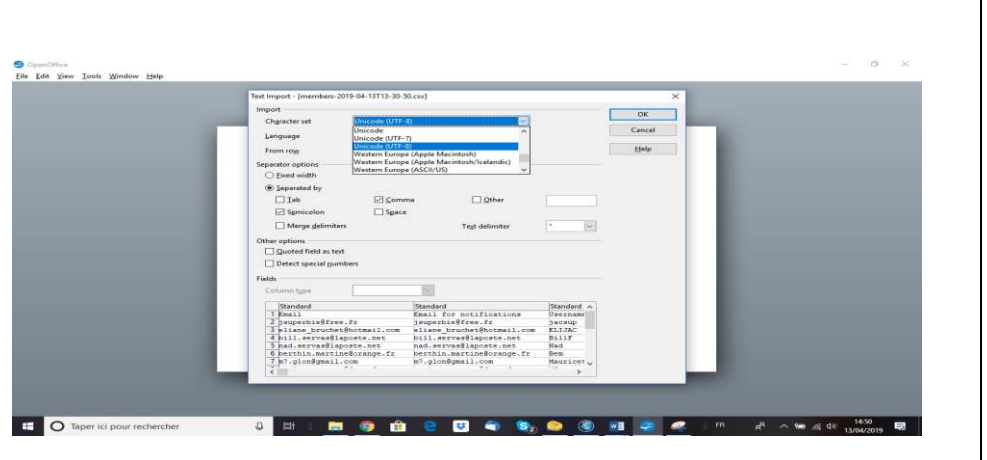

23. Check the
resulting list,
adjusting again,
if necessary.
24. Scroll to the
right to see all
the fields.
Note: the old
and new eStamp
numbers are
listed colum CM.

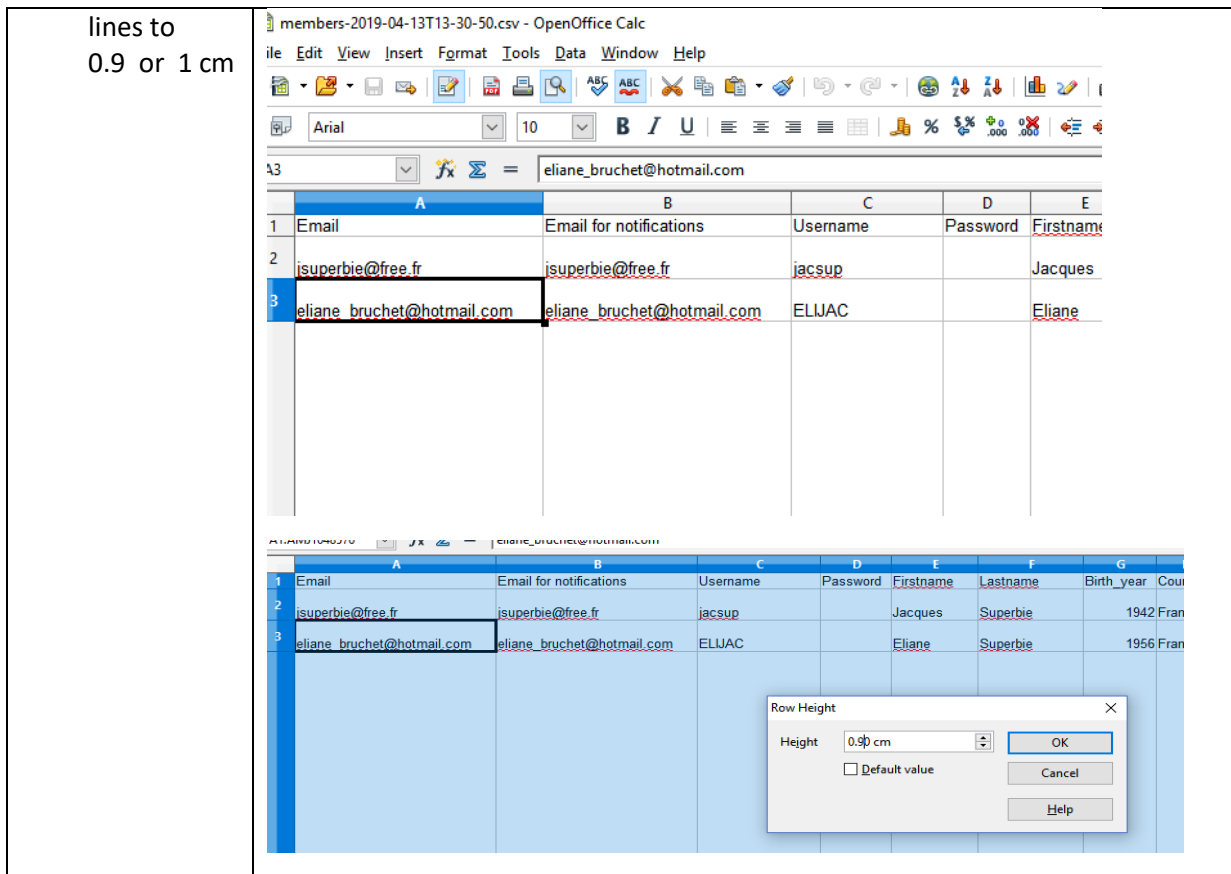
	A	B	C	D	E	F	G	H
1	Email	Email for notifications	Username	Password	Firstname	Lastname	Birth_year	Count
2	robertoservas@gmail.com		rola		Roberto	Capezzuto		France
3	jsuperbie@free.fr	jsuperbie@free.fr	jacsup		Jacques	Superbie	1942	France
4	eliane_bruchet@hotmail.com	eliane_bruchet@hotmail.com	ELJAC		Eliane	Superbie	1956	France
5	lebihan.yannick@laposte.net		louenn		Yannick	Le Bihan	2017	France
6	bill.servas@laposte.net	bill.servas@laposte.net	BillIF		Bill	Fisher	1948	France
7	nad.servas@laposte.net	nad.servas@laposte.net	Nad		Nad	Baudon	1952	France
8	berthin.martine@orange.fr	berthin.martine@orange.fr	Bem		Martine	Berthin	1957	France

CD	CE	CF	CG	CH	CI	CJ	CK	CL	CM	
membership_end_validity	Membership_fee_year	Active_status	Servas_key_use	User_notes	id	Admission date	Deactivation_date	Dernier accès	Timbre voyageur	
		Non			42298					
31-janv-20		Oui			37405	14-avr-18		04/11/2019 - 15:50		
31-janv-20		Oui			35230	14-avr-18		05/02/2018 - 20:40		
		Non			27835					
31-janv-20		Oui			26832	07-juil-17		03/27/2019 - 20:03		
31-janv-20		Oui			26831	07-juil-17		03/27/2019 - 13:50		
31-janv-20		Oui			19443	19-déc-16		05/03/2018 - 10:00		
31-janv-20		Oui			15592			02/25/2019 - 20:44		
31-janv-20		Oui			15601			03/06/2019 - 06:59	FR-2019-0100	
31-janv-20		Oui			15594			01/13/2019 - 16:33	2018-2005	
31-janv-20		Oui			15596			03/09/2017 - 18:17		
31-janv-20		Oui			15589			03/29/2017 - 07:13		
		Non			15598					
31-janv-20		Oui			15591			08-déc-17	04/13/2019 - 20:49	FR-2019-0145

5.2. Adjusting the format of the exported CSV file

Ensure you have downloaded **“Apache Open Office (Free software)”** to your Computer/Tablet.

<p>25. Navigate to the directory you chose for your file.</p> <p>26. Right click on the file and then Open with, selecting the OpenOffice Calc option.</p>	
<p>27. Select Character set : UTF-8</p> <p>28. Select separated by: Comma and Semicolon then click [OK]</p>	
<p>29. If some rows are too wide, select all the page (click on the left upper corner of the table), then right click in a row, and set the Height for all the</p>	



You can now work on the file using **Calc** or save it as an **.ods** file.
If you prefer to work with **Excel**, save as an **.xls** file.

6. Adding member roles (Host, Day Host Only or Traveller)

Refer to **3 - Editing the member profile** above. Member type shows the current roles approved for this user.

Add a check mark alongside the new **Host**, **Day Host Only** or **Traveller** role being assigned to this member. You can't select together Host and Day Host Only, but it is possible to be "Traveller" only, "Host and Traveller" or "Day Host Only and Traveller"

For details regarding approving LOIs within ServasOnline, see the separate help article **Approving LOIs using eStamps**.

Note: In some countries, members can request to be hosted by other members in their own country without paying traveller fees. They should be marked as a Traveller. (LOI must not be issued in this case)

These members can see host listings and communicate with hosts in other countries. However, they must pay the traveller fee and get a stamped LOI before they request to be hosted abroad.

7. Customizing the Members Administration process

Each country can customize the way ServasOnline handles the requests for membership. This must be coordinated with the Servas Online administrator.

Note: the default setting for the below be used for your country, unless coordinated otherwise with servasonline@servas.org

Multi-member household management

Individual-based (default) - Each adult Servas member creates a separate account even if there is more than one Servas member living in the household.

These two accounts are linked within the system to identify the members as living with another separately registered member. In “Live with” type the firsts letters of the partner Last name and select the partner in the rolling list

Household-based – A single record in ServasOnline will contain the information for all household members. See the User Help for more information.