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# APWA DATA DICTIONARY FOR REPORTS

|  |  |
| --- | --- |
| **Term** | **Definition** |
| Individual Membership | Individual has purchased their own membership of type Individual, Student, or Retired. Or, the individual qualifies for a Life Membership. |
| Group Membership | Purchase of this membership is by a Company which then buys a set number of ‘roster seats’. Individuals are assigned to those seats and receive member benefits via the Group Membership. This can be for public agency membership and corporate membership types. |
| Contact is a Current Individual Member Flag | If this flag is checked, the individual holds an active Individual Membership. |
| Individual Membership Paid Through Date | The value in this field represents the end date of the last Individual Membership held by an individual. You may see dates that have passed in this field showing the last individual membership held by this contact – in this case, the ‘Contact is an Individual Member Flag’ should be blank. |
| Individual APWA Member Type | Represents the type of Individual Membership held by an individual (Individual, Student, Retired, Lifetime) |
| Contact is a Current Group Member Flag | If this flag is checked, the individual holds a roster seat on an active company membership. |
| Company Paid Through Date | The value in this field represents the end date of the last Group Membership of the company. You may see dates that have passed in this field showing the last group membership held by the company – in this case, the ‘Contact is a Group Member Flag’ should be blank. |
| Group APWA Membership Type | Represents the type of Group Membership held by a member company. These member types have been set up with varying base levels of seats that correspond to pricing tiers (Public Agency Membership – Base 2, Public Agency Membership – Base 4, Heritage Corporate Membership, etc.) |
| Additional +1 (or other numbers) | Membership items that have been set up to allow a company to purchase additional seats that fall outside the base membership quantities. If a Public Agency wishes to purchase a total of 3 seats, their membership will include the ‘Base 2 ‘and the ‘Additional +1’. Some individuals may show as having a Group APWA Membership Type of ‘Additional +1’. It does not mean that the individual is not being counted as a member. They will be counted as part of the group membership for their company. APWA is actively working on correcting these records. |
| Account Name | Required Salesforce field which holds the name of the account (or company) in which an individual is affiliated with. When no company is selected, Salesforce defaults this field to ‘(Name of Contact) Household Account’ |
| Company Name | Calculated, non-editable field that copies the Account Name to this field if the account name does not contain the word ‘household’. Therefore, this field will be blank for individuals affiliated with a household account and populated with the account name for others. This field should be used if mailing addresses are needed. |
| Original Join Date | Represents the first date of membership with APWA. This date was populated during the migration from iMIS to Fonteva. For new members in Fonteva, this date represents the date an Individual paid for an individual membership. |
| New Member | Individual who is a first-time APWA member of any type (individual or group). |
| Active Member | Individual or Company that holds an active membership (individual or group). |
| Lapsed Member | Individual or Company that has not renewed a membership prior to the Paid Through Date. |

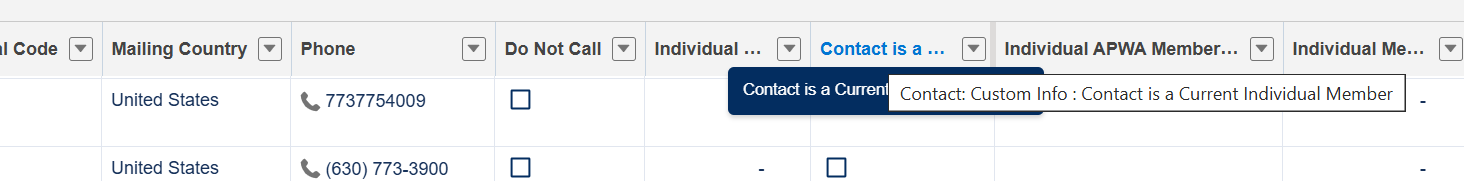
# GENERAL REPORTING

1. All reports exclude test records, staff records, and deceased members. These are locked filters on each report.
2. All reports that list contact information also include the ‘Do Not Call’ flag.
3. No changes were made to any of the Event-related reports.
4. Working in a Salesforce-based application requires that all individuals (contacts) are related to a Company (account). When an individual does not have a related company (student, retired, etc.), the system creates a ‘Household account’ for the individual. We have addressed this by having 2 fields. The **Account Name** field will hold the name of the company as it is stored in the database and the **Company Name** field is a calculated field that is blank for individuals with a Household Account and populated with the same company name for individuals associated with actual companies. For mailings, you will want to use the Company Name field so ‘Household’ doesn’t appear as part of the address. Both fields are included on the roster reports that include Individual members.
   1. Note: We are aware that there are individuals with Household accounts that belong to actual companies. We are working to institute a process for updating these records.
5. There is no Grace Period set for APWA membership, therefore, on the first day of each month you will likely see a drop in your member counts. As late renewals are processed, these counts will increase. It is good practice to monitor counts and use the last days of the month as a good measure of membership KPIs.
6. Some of the reports contain filters with ‘relative operators’. This type of filter provides flexibility in selecting a timeframe you want to filter on the report. See ‘[Relative Date Operators](#_RELATIVE_DATE_OPERATORS)’ section for more information.
7. All reports provide the ability for the user to Sort and Group. This is done by using the arrow next to the column name on the report. See ‘[Sorting and Grouping](#_SORTING_AND_GROUPING)’ section for more information.
8. All report data can be exported and used in Excel or other applications. Use the down arrow next to the Edit button.

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1. Hover on any report column heading to see the full name of the field.



### Sorting and Grouping

Use the down arrow next to a column name for options to Sort and Group. These options change the report when viewing and are not stored for the next time the report is run.

For example, you may want to Group by Account Name on the ‘Group Counts Report’ to see all individuals related to that account, along with the number of individuals within that group.

Before Grouping:

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After Grouping:

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### Relative Date Operators

You can use Relative Date Operators to filter data based on time periods. These operators can be used in conjunction with qualifiers:

* Year
  + THIS YEAR, LAST YEAR, NEXT YEAR, LAST 2 YEARS
* Quarter
  + THIS QUARTER, LAST QUARTER, NEXT QUARTER, LAST 4 MONTHS
* Month
  + THIS MONTH, LAST MONTH, NEXT MONTH, 3 MONTHS AGO, NEXT 2 MONTHS
* Week
  + THIS WEEK, LAST WEEK, NEXT WEEK, 4 WEEKS AGO, LAST 3 WEEKS
* Day
  + TODAY, YESTERDAY, TOMORROW, LAST 3 DAYS

Click on the Filter Icon to open the filter pane. Click on the Date filter and enter the relative operator, click Apply. The report will show updated results.

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# NEW REPORT DEFINITIONS

## Total Membership Count Report

This is a new report that provides **a consolidated active member roster** for the chapter. This report will list members regardless of the type of membership they have (Individual or Group). You will see the following new fields on this report:

* 1. **Contact is a Current Individual Member flag**: this flag is ON when a contact has an active (paid) individual membership subscription
  2. **Contact is a Current Group Member flag**: this flag is ON when a contact has an active assignment to an active (paid) group membership subscription

Reminder: There is no Grace Period set for APWA membership, therefore, on the first day of each month you will likely see a drop in your member counts. As late renewals are processed, these counts will increase. It is good practice to monitor counts and use the last days of the month as a good measure of membership KPIs.

The top of the report provides counts of Overall Membership, Individual Members, Group Members and those flagged as Do Not Call. It is expected that the number of current individuals + the number of group individuals equals the Total Records. You may find an individual on your roster with both types of membership flags on causing these numbers not to match the overall total. APWA is researching members with this issue and will be making corrections to the data.

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* This report can be exported and easily filtered on the member type flags. In addition, there are 2 additional reports provided that break out Individual Members vs Group Members.

### Important

* An individual with their own Individual membership may be associated with a Company. The Company may have its own Group Membership, but that individual is not part of the company roster. Therefore, you may see an Individual with an active Individual membership that includes information about the Company membership. In this case, the ‘Contact is a Current Individual Member’ is ON and the ‘Contact is a Current Group Member’ is OFF.

Ex: This member has an active individual membership that expires 10/31/2025. The last group membership for their company expired 5/31/2024.



* An individual on a company roster may have had an individual membership at some point. Therefore, you may see an individual with ‘Contact is a Current Group Member’ ON and also includes information about their last (lapsed) individual membership.

Ex: This member had an individual membership that expired 9/30/2023 but is active on a group membership that expires 2/28/2026



## (Chapter Name) Active Individual Membership and (Chapter Name) Active Group Membership Reports

There are two separate reports that break out the members by the type of membership they have, Individual or Group.

### Individual

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### Group

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## (Chapter Name) New Member Roster

A **New Members This Quarter** has been provided that by default shows new members, based on their original Join Date, for the This Quarter. Users can change the filter on this report to other relative date operators. This report has columns that designate the type of membership the new member holds.

*NOTE: There is a known system data issue that prevents the tracking of the first date an Individual joins an existing company roster. If the company is new, the company and related individuals will show on this report. This issue is currently being worked on and you will be alerted when the system will start tracking the first date an individual joined an existing member company roster.*

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## (Chapter Name) Last 90 Days Expired Individual Member and (Chapter Name) Last 90 Days Expired Group Member Reports

The **Last 90 Days Expired Individual Member** report selects any individual who had an active membership subscription that lapsed in the Last 3 Months. Therefore, the default is a rolling 3 months. Users can change the filter on this report to other relative date operators.

The **Last 90 Days Expired Group Member** report selects any companies that had an active group membership subscription that lapsed in the last 3 months. Therefore, the default is a rolling 3 months. Users can change the filter on this report to other relative date operators. This report lists the Primary Contact for each company and does not list all of the previously rostered members.

### Individual

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### Group

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