

OA LodgeMaster System Description

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This document outlines the features and capabilities of the OA LodgeMaster system. OA LodgeMaster ("OALM") is a lodge membership management system designed to support the operations of lodges throughout the Order of the Arrow. It is being developed and offered by the National OA Committee as an optional support application, not a requirement. The system includes two elements: the desktop program that runs on a user's computer called OALM Desktop, and a companion website with additional functionality called OALM Online. Lodges can choose to run OALM in Standalone Mode, with no OALM Online functionality on the Internet, or in Standard Mode, with full OALM Online support.

Minimum System Requirements for OALM Desktop

- Intel® Pentium® or compatible 300-MHz or faster processor
- Microsoft® Windows® XP or Windows® 2000 Service Pack 3 or later
- 128MB of RAM or greater
- 100 MB of available hard-disk space, plus space required for data
- Super VGA (800 x 600) or higher-resolution monitor;
- Dial-up or broadband Internet access (if run in Standard Mode)

For browser and system requirements of OALM Online, visit www.oalodgemaster.org.

Basic Rules

- OALM will support a single lodge per council.
- Council numbers will be used to identify lodges when a numeric code is necessary. Lodges will otherwise be represented by the lodge name, council name, and council number.

Initial Setup

- Upon first run of OALM, an approved member of the Lodge Leadership shall use the Lodge Setup Wizard to create their lodge's database. If run in Standard Mode, this will also initiate the database creation on the OALM Online servers for that lodge. This initial setup includes setting the following information:
 - Lodge name and council information, location, totem
 - Region, area, and section specification
 - Chapter listing (or disable chapters)
 - Lodge membership dues amount
 - User, password, and permissions information (Standard Mode only)
- All of these values can be changed at any time by either running the Lodge Setup Wizard again, or accessing the Lodge Information page.

Features & Data

The following features and types of information will be available within the OALM Desktop system:

- **Member Data and History:** Store and view BSA Person ID, name, contact information (postal address, e-mail address, multiple phone numbers), date of birth, dates and locations of election and honors, dues paid status and history (both OA and BSA), Ordeal clan assignment, unit information, ceremony capabilities, event attendance history, leadership position history, member resources (e.g., hobbies, skills, equipment), award history, and service hour history.
- **Event Management:** Input event information (including date, location, ceremonies offered, service hours offered, training offered, and custom information specific to your lodge and the event) and manage events with on-site event sign-in and registration, event history, dues unpaid alert for event attendees, event fee tracking, and automatic lodge calendar creation.
- **Ordeal Manager,** including clan and elangomat tracking, candidate data, and roster listing.
- **Ceremony Team Tracking:** Keep track of ceremonialists in the lodge, group by team, see which ceremonies each team is capable of performing, create custom ceremonies and extra roles specific to the lodge.

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- **Service Hour Tracking:** Track service hours performed by members throughout the year. Store service hours individually for a member and/or apply a certain amount of service hours to each attendee of an event in the events listing.
- **Lodge Asset Tracking:** Track lodge property/assets (such as ceremony gear, keys, etc.) and check out items to individual lodge members.
- **Trading Post Inventory:** Manage trading post inventory, store product information, calculate costs and profits based on inventory sold at an event or during a specified time period.
- **Quality Lodge Calculations:** Automatically calculate some Quality Lodge requirements, including service hours, unit contacts and visitations, brotherhood conversions, and more. Input Quality Lodge attainment data each year to create trend reports.
- **Unit Information:** Store unit contact information and meeting information and keep track of unit communications (camp promotions visits, unit elections, and other communications).
- **Lodge Finance:** Track lodge finances, based on the guidelines outlined in the Lodge Finance Record Book.

Reports & Information

Following is a sample of the list of reports that will be available within the OALM system:

- **Member Information:** Roster by Chapter, Roster by Unit, Roster (All), Roster by Leadership Positions, Award History, Brotherhood Eligibility List, Brotherhood Conversion Forecast, BSA Dues Paid List, BSA Dues Unpaid List, OA Dues Paid List, OA Dues Unpaid List, Individual Member History, Member Lodge Transfer Report, Member Resource List, Membership Cards, New Member List by Chapter, New Member List by Event, Leadership Position List, Vigil Eligibility List
- **Assets & Inventory:** Assets List, Assets Checked Out, Assets Overdue, Trading Post Inventory Listing
- **Auction:** Auction Bidder List, Auction Final Sale Summary, Auction Item Inventory, Auction Outstanding Payments, Auction Preliminary Summary, Bidder Invoice
- **Ceremonies:** Ceremony List by Ceremonialist, Ceremony List by Ceremony Team, Ceremony Lists by Chapter
- **Chapters:** Chapter Information Report, Chapter Leadership Roster
- **Events & Locations:** Event Attendance List by Chapter, Event Attendance List by Cost, Event Attendance List by Honor, Event Attendance Trends, Event Brotherhood Eligibility List, Event Dues Unpaid, Event Honor Advancement Report, Event Registration Form, Event Role Roster, Event Sign-in Sheet, Event Summary Report, Event Unpaid List, Directions Sheets, Locations List
- **Lodge Calendar:** Lodge Calendar by Ceremonies Offered, Lodge Calendar Detailed View, Lodge Calendar List View, Lodge Calendar Location View, Lodge Calendar Month View, Lodge Calendar Yearly View
- **Ordeals:** Ordeal Attendance List, Ordeal Attendance Trend List, Ordeal Weekend Summary, Ordeals Annual Summary, Ordeal Candidate List, Ordeal Clan Lists
- **Finance:** Budget Forecast, Council Reconciliation Discrepancy, Detailed Accounts Listing, Treasurer's Report
- **Service:** Annual Service Report, Event Service Report, Service Report by Chapter, Service Report by Event
- **Units:** Scoutmaster List, Unit Communication History, Unit Contact List, Unit Election Report, Troop/Team Representative List
- **Quality Lodge:** Quality Lodge Audit Overall and by Chapter, Quality Lodge Petition, Quality Lodge Trends
- **Lodge Information:** LEC Sign-in Sheet, Lodge Information, Lodge Leadership Roster, Vital Statistics
- **Trend & Analysis:** Brotherhood Conversion Trends, Brotherhood Conversion Trends by Chapter, Dues Trends Analysis, Dues Received by Month, Induction Process Attrition by Age, Induction Process Attrition by Chapter, Membership Trends by Chapter, New Members by Chapter Trends, Quality Lodge Trends
- **Mailings & Personalized Forms:** Mailing Labels, Bulk Mailing Audit & Zip Code Count, Membership Renewal Form

Other Important Features

- Import/Export Wizard will allow data to be exported to or from Microsoft® Excel® or CSV. At NOAC 2006, Lodge Migration Specialists will be available to migrate lodge databases from a number of different forms into OA LodgeMaster.

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- Multi-user security system will allow multiple users of the lodge to operate in OALM with different permissions levels.
- Export and import data and results for ScoutNET's BSA Membership Verification System to confirm BSA Dues Paid status.
- Report Creator allows easy access to all built-in reports as well as custom, user-definable reports.
- OALM Update will automatically check for and announce new versions of the software.
- Bug Reporting & Feature Request allows users to submit problems and request new features to the OALM Development Team.
- OALM is constrained only by file size; i.e., the number of records in the database is not limited as long as there is adequate hard drive space available.

OALM Online Features

OALM Online is the companion web portal available as part of the OALM system (when run in Standard Mode). It consists of a unique web site and web storage for each lodge using OALM that links directly to the lodge database. Following is a sampling of some of the features that will be available:

- **Automatic, built-in features**

These features happen behind the scenes when OALM is run in the default Standard Mode.

- Nightly backup of entire lodge database on the OALM servers
- Data and user/security synchronization between all OALM Desktop clients and OALM Online web portal that keeps all users of OALM up-to-date.

- **Information available to the public**

These features are available as an extension of the lodge's existing website.

- Lodge Event Calendar automatically created from event listing (available in browser, in PDF, or XML)
- Event RSVP System to allow members to RSVP for lodge and chapter events
- Directions to events and locations
- Email Form to securely and safely contact lodge leadership without exposing e-mail addresses or personal information

- **Secure, password protected features**

These features are only available to authorized members of lodge or chapter leadership.

- View certain tables and reports
 - Rosters: Chapter, Lodge, New Members, Candidates, Brotherhood Eligible, Vigil Eligible, Ceremony Teams, Unit Contact List
 - Search member resources (such as hobbies, skills, and equipment)
 - Event RSVP Lists
 - Lodge/Chapter Statistics
 - Quality Lodge Progress
 - Post Event Report: Attendance Overall, by Chapter, Service Completed
- Mass E-Mailer to send e-mails to specific groups of lodge members
- Phone-a-thon Manager to help facilitate Phone-a-thons
- Current Membership Statistics
- Unit Communications/Elections Manager to keep track of unit elections, camp promotion visits, troop/team representatives, tracks which units have been visited and allows Election Results to be input

Release Timeline

OA LodgeMaster will be officially released at NOAC 2006. Initial testing of OA LodgeMaster 0.9 Alpha will begin at the end of Summer 2005, with a semi-public beta test beginning in January 2006.

For more information, visit
www.oalodgemaster.org