UHD/UMD™

UNIT MEMBERSHIP DATABASE

(UMD)

QUICK REFERENCE GUIDE

&

ADMINISTRATIVE USER MANUAL

FOR

UMD UNIT LEADERS,

ACCOUNT MANAGERS,

ACCOUNT MANAGER PROXIES, AND

UMD SUPER USERS

Office of the
Vice President for **Research**
at the university of georgia

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UNIT MEMBERSHIP DATABASE

(UMD)

QUICK REFERENCE GUIDE

UMD QUICK REFERENCE GUIDE

This guide provides a quick way to see the functions of the UMD Administrative Control.

LOGGING IN

- To access the UMD Admin Panel, go to http://umd.ovpr.uga.edu/
- Enter your UGA MyID and Password and click the Login button.

UMD UNITS LIST

- UMD Units displays after successful login
- List includes all UMD units in which you have a role as Unit Leader, Account Manager or Account Manager Proxy
- To manage a unit, click on its name

UMD UNIT MANAGEMENT MAIN SCREEN

This screen provides access to all the UMD management functions for this unit. From this screen you may manage:

- Unit (administrative) Roles
    - o Unit Leader (Super User only)
    - o Account Manager
    - o Account Manager Proxies
- Email (notification) settings
    - o Content
    - o Applicant notification active/inactive
- Membership Types
- Members
- Applicants
    - o Review applicants
    - o Upload applicants in batch or one at a time
        - ▪ UGA persons
        - ▪ Non-UGA persons
- Unit's UGA LISTSERV Account
    - o Set up the account
    - o Remove the account

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Quick Reference Guide   Page i

MANAGING UMD APPLICANTS

On the UMD Account Management Main screen under the Membership Management heading, click the Applicants link. The Applicants screen appears. From this screen you may

- Send email to the applicant
- Approve, deny or delete applications
- View an individual's application
- Edit an applicant's membership type

MANAGING A MEMBERSHIP LIST

Unit Leaders, Account Managers and Account Manager Proxies may view and manage the list of approved members for a UMD unit. On the Account Management Main screen, under the Membership Management heading, click the Members link. The Members screen will appear. From this screen you may

- Deactivate, Activate and Delete members
- Send email to a member or a selection of members
- View and edit a member's profile

UMD SUPERUSER

The UMD Super User role allows the user to manage any existing unit account and to register UHD units in UMD. A Super User uses the same screen as any other user with a management role, except the Super User has access to every UMD registered unit. From the UMD Units screen, the Super User may

- Register UHD units in UMD
- Assign a Unit Leader, Account Manager and/or Account Manager Proxies
- Assign a name to a UMD Unit UGA LISTSERV

TABLE OF CONTENTS

Office of the
Vice President for **Research**
at the university of georgia   Table of Contents   Page ii

Office of the
Vice President for **Research**
at the university of georgia   Table of Contents   Page iii

TABLE OF FIGURES

Office of the
Vice President for **Research**
at the university of georgia

Table of Figures Page v

UHD/UMD

Office of the
Vice President for Research
at the university of georgia

Table of Figures Page vi

OVERVIEW

BACKGROUND

The Unit Membership Database (UMD) was developed to support the Centers and Institutes reporting to the UGA Office of the Vice President for Research (OVPR). However, UMD was designed for membership management of ANY organizational unit in the UGA organizational hierarchy (using OVPR's Unit Hierarchy Database).

UMD addresses any UGA organization's common need to:

- manage their membership lists

- solicit and manage membership applications online

- give online access to profiles and interests of members

- easily communicate with members

- provide secure "members only" web pages

- seamlessly support non-UGA employees("non-UGA Affiliates") as applicants and members

- rapidly deploy the delivery of these services through the unit's website using web services

UMD works in conjunction with the OVPR Unit Hierarchy Database (UHD) (formerly called "XID"), which defines the hierarchy of UGA's organizational units, well beyond the capabilities of UGA's BUD_ORG_STRUCTURE. UMD/UHD also works with other OVPR authoritative data sets, such as the People, Affiliates, Units, Locations and Accounts Database (PAULA), OVPR's multi-branched LDAP server and web services authentication server.

BENEFITS

UGA's Unit Membership Database (UMD) provides:

- Distributed (decentralized) management of memberships of UGA units represented in the Unit Hierarchy Database (UHD)

- A set of web services that enable a unit's website to interact with the membership database, avoiding the development and maintenance complexities and security issues of embedding membership data in a website's code or unit-owned database platform

- Use of the Unit Hierarchy Database (UHD), which provides for the definition of unit hierarchical relationships

- Convenient methods to communicate with a unit's members via Email, including UGA LISTSERV

- Means to provide "members only" web content through member login and authentication (using UGA MyID/password)

- A convenient method to solicit and manage membership applications

- Capabilities to include non-UGA employees and students as members of a unit, including login authentication of these "non-UGA Affiliates"

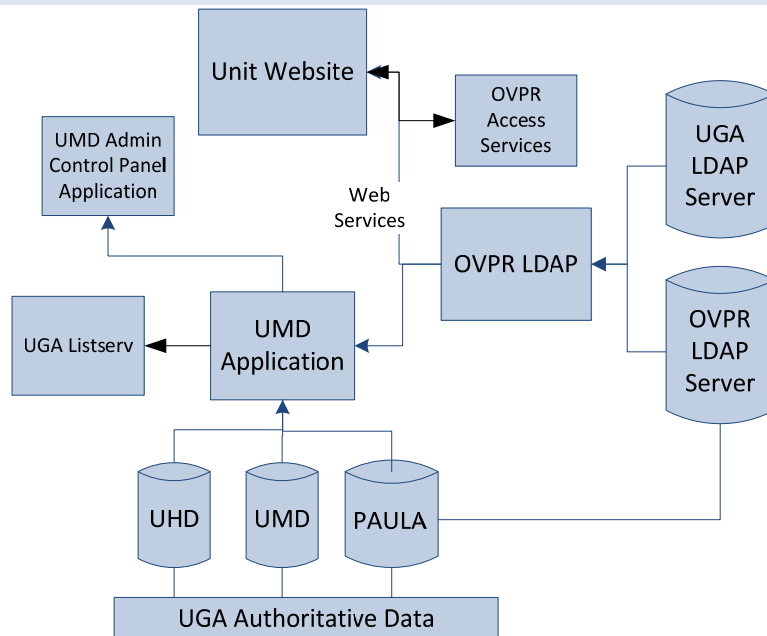- An authoritative, centralized database of UGA and non-UGA persons belonging to a UGA organizational unit

Office of the
Vice President for **Research**
at the university of georgia

Overview   Page 1

COMPONENTS

Figure 1. UHD/UMD Components

The UMD solution was developed by and is hosted and supported by OVPR's Office of Research Information Systems (ORIS) and includes the following components:

- A centralized MySQL database providing secure storage and management of all of the components of UMD and its supporting infrastructure

- A web-based UMD Administrator's Control Panel for use by persons designated with UMD Unit management roles

- Use of the PAULA database for reference to authoritative identity management data about UGA and non-UGA Affiliates

- Use of the PAULA database for creation and management of non-UGA Affiliates

- Use of the OVPR/LDAP authentication server for secure login authentication of UGA persons and non-UGA Affiliates

- A web-based servlet handing secure web service communications between a unit's website and the UMD database

- A set of web services providing all of the functionality required for two-way communications between a unit's website and the UMD servlet

- The OVPR Access Services authentication server, assuring only authorized applications are allowed communication with OVPR web services

- Interfacing with UGA's LISTSERV, providing automatic generation and synchronization of LISTSERV lists for each UMD organization

- Automatic generation of a LISTSERV list of the Unit Leaders of all organizations with a UHD Unit Type (i.e., Center Directors, Department Heads)

- The computing, storage and communications hardware platforms required to operate the system

- A UMD Software Developers Kit (UMD/SDK)

- This UMD Administrative User Manual

SYSTEM SECURITY AND RESILIENCY

UMD and UHD are architected and hosted with features that optimize security.

DATA CENTER

UMD is hosted on the OVPR IT infrastructure housed in the UGA Boyd Data Center, providing:

- 24-hour physical security using badge readers and cameras
- Resilient power using uninterruptable power supplies (UPS) and gas turbine power generators
- Network security using UGA's network firewalls and other devices

SECURITY ARCHITECTURE

UMD is implemented with security features including:

- Secure Socket Layer (SSL) network encryption
- Login authentication using the OVPR LDAP server, which utilizes the UGA LDAP server for UGA employees/students and the OVPR LDAP server for non-UGA Affiliate authentication
- Web services security using OVPR Access Services, assuring that only authorized applications are accessing OVPR web services
- No storage of login passwords in the database

OVPR/IT INFRASTRUCTURE

The OVPR IT infrastructure includes the following features for optimal availability and resiliency of the application:

- Virtualization of the host computers, allowing optimization of computing resources and enhancing system availability
- Fully redundant storage subsystem to avoid outages and/or data loss
- Frequent snapshots and backups of critical data, in case of minor or catastrophic system failure
- Support by OVPR's professional system administrators, who monitor and manage the OVPR IT infrastructure in partnership with the UGA EITS Network Operations Center (NOC)

-

UMD USER ROLES

UMD uses role-based security to assign privileges to a set of defined roles when using the UMD Administrative Panel. The table below shows the roles and privileges of each:

UMD Administrative Panel Function	Super User	Unit Leader	Account Manager	Account Manager Proxy	Member
Register Unit in UMD	X				
Assign Account Manager	X	X			
Assign Account Manager Proxies	X	X	X		
Define Unit Membership Types	X	X	X	X	
Enter Membership Lists as Batch Files	X	X	X	X	
Enter Members Individually	X	X	X	X	
Reject or Accept Applicants	X	X	X	X	
Edit any Members' Profile	X	X	X	X	
Manage Email Notifications to Applicants	X	X	X	X	
Define Unit LISTSERV Name	X	X	X	X	
Become a member of the Unit Leadership LISTSERV		X			
Become a member of the Unit Membership LISTSERV		X			X

Table 1. UMD Admin Panel Privileges by User Role

UMD SUPER USER ROLE

The UMD Super User is an OVPR resource and has overall responsibility for defining UMD accounts and granting access to those accounts to the Unit Leader of a Unit's Account.

The UMD Super User
- Registers UHD units in the UMD Database
- Assigns the Unit Leaders
- Change a UMD unit's Unit Leader
- Has all of the privileges of the Unit Leaders, in order to assist the Unit in using UMD

UNIT LEADER

There must be one (and only one) Unit Leader for each UMD Account. The UMD Unit Leader, assigned by the UMD Super User, is the top-most manager/administrator of an organizational unit, for example, the Dean of School/College, Head of Department, Director of Center/Institute.

The Unit Leader has the following privileges:
- Becomes a member of the UGA LISTSERV of Unit Leaders
- Assign the Account Manager

Office of the
Vice President for Research
at the university of georgia

Overview   Page 4

- Assign Account Manager
- Define unit Membership Types
- Manage email notifications
- Reject or accept applicants
- Define unit's membership UGA LISTSERV account

ACCOUNT MANAGER

There must be one (and only one) Account Manager for each UMD Account. The UMD Account Manager role is assigned by default as the Unit Leader, but may also be assigned by the UMD Super User and is assigned to any person who will assume responsibility for managing a UHD Unit's membership. The UMD Account Manager has the following privileges:

- Assign Account Manager Proxies

- Define Unit Membership Types

- Manage email notifications

- Reject or accept applicants

- Name a unit's membership UGA LISTSERV account

ACCOUNT MANAGER PROXY

There may be any number of Account Manager Proxies for each UMD Account. The UMD Account Manager Proxy role is normally assigned by the UMD Account Manager, but may also be assigned by the UMD Unit Leader or the UMD Super User. The UMD Account Manager Proxy has the following privileges:

- Define Unit Membership Types

- Manage email notifications

- Reject or accept applicants

- Define unit's membership LISTSERV account

Note: Proxies are tied to a given Account Manager. When the Unit Leader replaces an Account Manager with a different person, *the privileges of the Account Manager Proxies are <u>deleted</u> and new proxies must be reassigned,* usually by the new Account Manager.

UMD MEMBERSHIP TYPES

Membership Types define the relationship of members to the unit (e.g., for use on a unit website) or business purposes of the UMD Unit. Membership Types are defined and managed by the person(s) managing the UMD Unit, and a UHD Unit may define any number of Membership Types and use any nomenclature.

Examples of Membership Types include "Member," "Affiliate Member," "Student," "Associate" and "Staff."

Every member must be assigned to at least one or more of the Unit's Membership Types.

REGISTERING A UHD UNIT AS A UMD ACCOUNT

Using the UMD Admin Control Panel, the first steps for defining a unit membership account are described below**:**

The UMD Super User must:

- Register the UHD unit in UMD
- Assign Unit Leader to the UMD unit

The UMD Unit Leader or the UMD Super User *must*:

- Assign UMD Account Manager

The UMD Unit Leader *may*:

- Assign Account Manage
- Assign Account Manager Proxies
- Name the unit's membership LISTSERV

The UMD Account Manager may:

- Assign Account Manager Proxies

The UMD Account Manager or Proxies *must*:

- Define Membership Types

IMPLEMENTING A UMD UNIT

After the UMD unit has been registered by the UMD Super User and UMD administrative roles have been assigned by the UMD Unit Leader, UMD is ready for you to implement for managing and accessing your Unit's membership information. The next steps are described below.

UMD MEMBERSHIP UPLOAD

Current members may be uploaded in batches or one at a time. Uploading or entering non-UGA affiliates is different from the uploading and entering of UGA (employees, staff and student) members and described below. After entry, these applications must be approved, as described below, for their membership to be complete. Once you have approved each of your membership applications, your UMD account is fully operational and available as a source of authoritative data for other systems, such as the unit's website, or the UGA Faculty Activity Repository.

USING THE UMD ADMIN CONTROL PANEL

The UMD Admin Control Panel is the location for all management tasks required of administrators of a UMD Unit. Below is a complete description of all of the Control Panel functions and options.

IMPLEMENTING UMD ON YOUR UNIT'S WEBSITE

Your web developer/designer may use the UMD web services, as described in the UMD Software Developers Kit (UMD/SDK), which include the following capabilities:

- submit member applications to UMD
- modify member profiles
- retrieve member profiles
- retrieve the membership list
- search and retrieve member profiles using search criteria
- display the unit's membership UGA LISTSERV name (email address)

TYPICAL MEMBER & PUBLIC ACCESS PRIVILEGES ON UNIT WEBSITE

Design of your website and the interaction of a web site visitor with UMD information are largely determined by your site's web designer. UMD administrative roles have no bearing on the privileges a user has in accessing the unit's UMD data. However, UMD members may be granted special privileges on a unit's web site after they login to the site and are authenticated as current members of the UMD unit. (The UMD web services include login authentication capability for use by the unit's web designer.)

Typically, a UMD website will be designed to provide the following privileges to authenticated members and public users:

Typical UMD Web Site Privilege	Member	Public
List Unit Members		X
Search Member Profiles		X
Access "Members Only" content	X	
Modify User Profile	X	
Apply for Membership		X
Send Message to Unit LISTSERV	X	X

Table 2. Typical UMD Unit Web Site Privileges for Members and Public

USING UMD-MANAGED UGA LISTSERV LISTS

UMD creates and maintains two types of UGA LISTSERV accounts:

- A listserv account for each UMD unit, that includes all of the unit's members
- A listserv account for each UHD unit type, that includes all of the unit leaders for each UHD unit type

UMD MEMBERSHIP LISTSERV

As part of the UMD Unit management, a LISTSERV name is given by the administrator. That name becomes the prefix of a UGA LISTSERV account created and managed by UMD. The LISTSERV name is suffixed with "-UMD-um". For example, a UMD unit's LISTSERV account named by the UMD unit administrator as "BSRI" would have a UGA LISTSERV named "BSRI-UMD-um" with an email address of "BSRI-UMD-um@listserv.uga.edu".

Whenever a member is added or removed from a UMD unit membership list, UMD automatically synchronizes the revised UMD membership list with the UGA LISTSERV.

UHD UNIT LEADER LISTSERV

UMD also creates and maintains UGA LISTSERV accounts for communicating with all of the Unit Leaders of each UHD unit type. For example, UMD creates a LISTSERV account named "Center-UMD-ul" that includes all of the Unit Leaders for all UHD units registered in UMD which are of the "Center" unit type. So to communicate with all Center unit leaders, the email address of "Center-UMD-ul@listserv.uga.edu" could be used.

These UGA LISTSERV names are returned to web service posts so that they may be displayed or used by a unit's web-based application, assuming that application is an authorized user.

Note: UHD Unit Types are listed below. However, UMD is NOT implemented across all UGA organizational units. The Office of the Vice President for Research is implementing UMD across all of UGA's Centers, Institutes, Research Support units, and Research units.
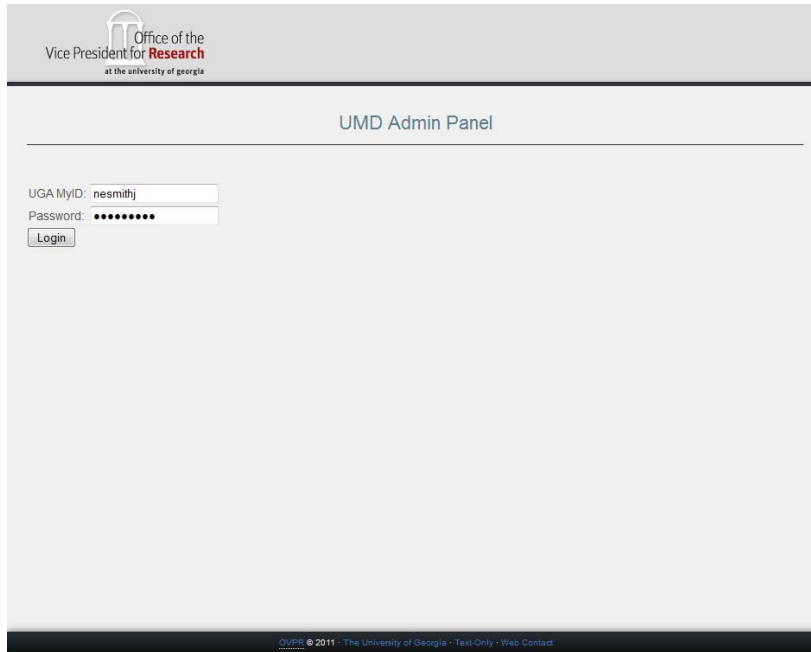
Academic Department	Instruction
Academic Division	Instructional Support
Academic Group	Major
Academic Support	Minor
Auxiliary Services	Outreach/Public Service
Budgetary	Programs
Center	Research
Certificate Program	Research Support
College	School
Committee	Student Group
Core Facility	Student Services
Council	Task Force
Degree Program	
Extension	
Group	
Institute	
Institutional Support	

MANAGING A UMD UNIT

UMD Units are managed from a series of web screens collectively called the UMD Admin Panel. The management process is described below.

LOGGING IN

1. To access the UMD Admin Panel, go to http://umd.ovpr.uga.edu/.
   The login screen will appear.

Figure 2. UMD Administrator Login Screen

2. Enter your UGA MyID and Password and click the Login button.
3. UMD will authenticate your login credentials using the OVPR LDAP server.
4. *If your login is authenticated AND you have an administrative role* in UMD, the UMD Units screen will appear.
   a. *If your login is invalid*, you will be notified, and you may try again.
   b. *If your login is authenticated, but you do NOT have an administrative role in UMD*, you will be notified of the error. In this case there is no need to try again, as you have not been assigned any administrative privileges in UMD.

UMD UNITS LIST

After successful authentication, the UMD Units screen will appear.
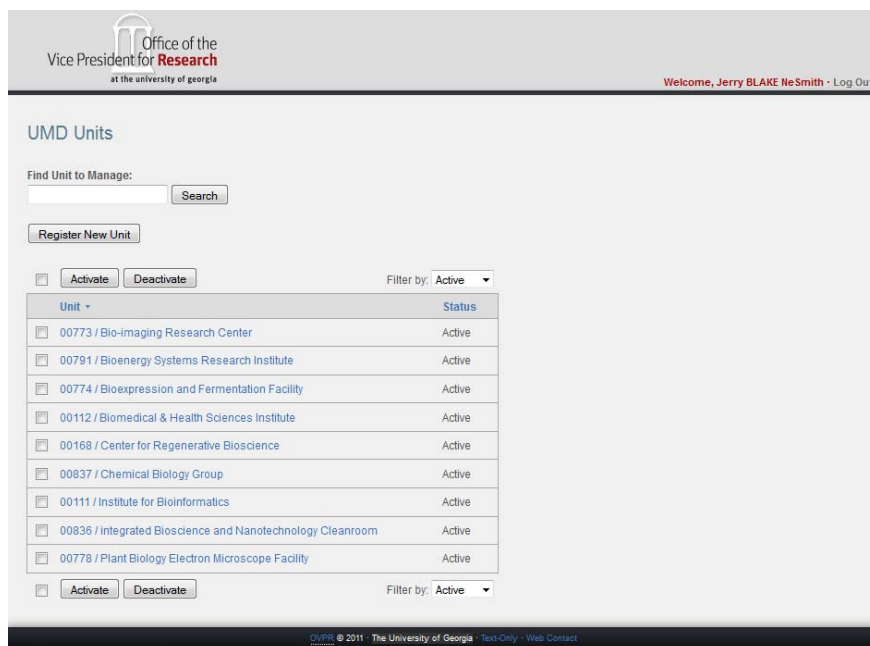
Figure 3. UMD Units Screen

The UMD Units screen displays a list of all of the UMD units in which you have a role as Unit Leader, Account Manager or Account Manager Proxy. UMD Super Users see all UMD units. (The "Register New Units" button is only visible to the Super User.)

- The units list can be sorted by name and filtered by Status (Active/Inactive) by clicking on those column headers.

- You may type a character string in the Search field and click the "Search" button to filer the list by unit names that contain that character string.

- The 5-digit number preceding the name is the UnitID from UHD

- The Status column displays "Active" or "Inactive." An inactive UMD unit has been made inoperative ("inactive") by the UMD Super User

- Each unit name is a link to the management of that unit's account

UMD UNIT MANAGEMENT MAIN SCREEN

After clicking a unit's name from the UMD Units List, the UMD Account Management Main screen appears.
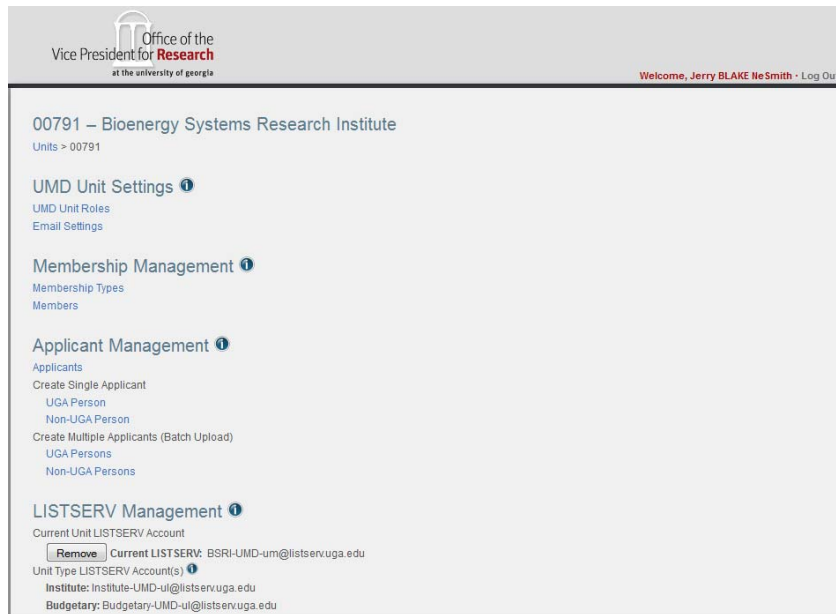
Figure 4. UMD Unit Management Main Screen

This screen provides access to all the UMD management functions for this unit.

This is the first level at which the "breadcrumbs" appear. Breadcrumbs are a navigation aid to help you keep track of your location within the UMD Admin Panel web screens and provide a convenient means to navigate back to previous web screens.

ASSIGNING UMD UNIT ROLES TO PERSONS

On the UMD Unit Management Main screen, click the UMD Unit Roles link. The UMD Unit Roles screen will appear.
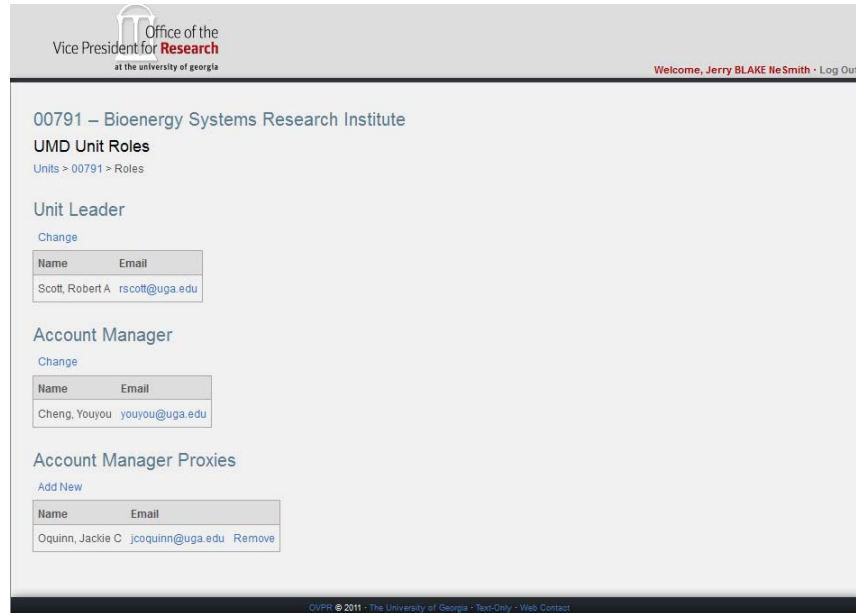
Figure 5. UMD Account Roles Screen

ASSIGNING A UNIT ACCOUNT MANAGER

In the example above, if Super User is logged in, "Change" appears under the Unit Leader and Account Manager headings, "Add New" appears beneath the Account Manager Proxies heading, and "Remove" appears adjacent to each Account Manager proxy.

If the Unit Leader is logged in, "Change" appears under the Account Manager heading, "Add New" appears beneath the Account Manager Proxies heading, and "Remove" appears adjacent to each Account Manager proxy.

If the Account Manager is logged in, "Add New" appears under the Account Manager Proxies heading, and "Remove" appears adjacent to each Account Manager proxy.

If an Account Manager Proxy is logged in, the proxy is not allowed to change any roles on this page.

Selecting any of the "Change" or "Add New" links takes the user to the UMD Choose Person screen. For example if the Unit Leader (or UMD Super User) chooses to change the Account Manager, the Choose Person screen appears as shown here:
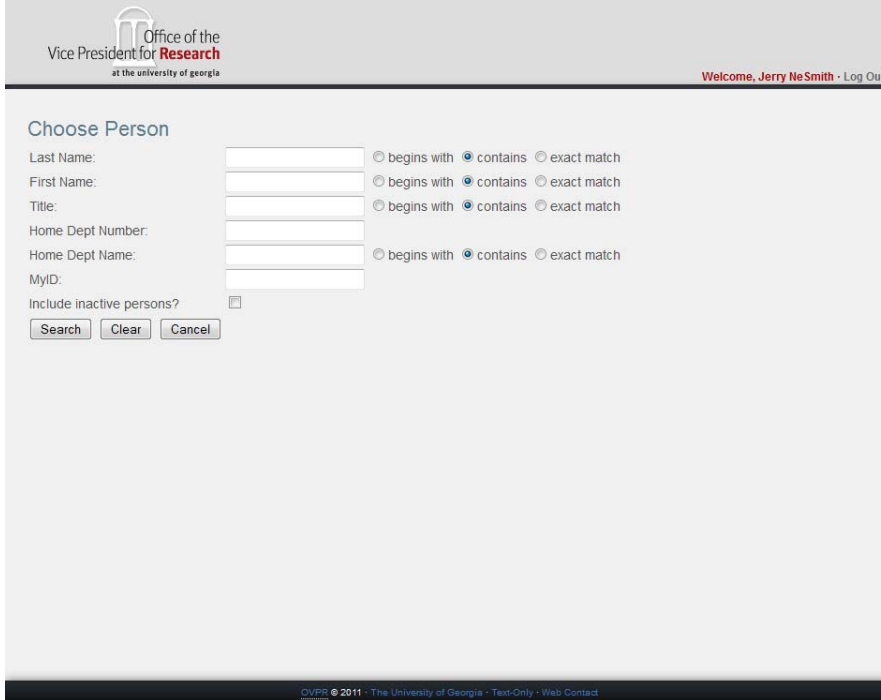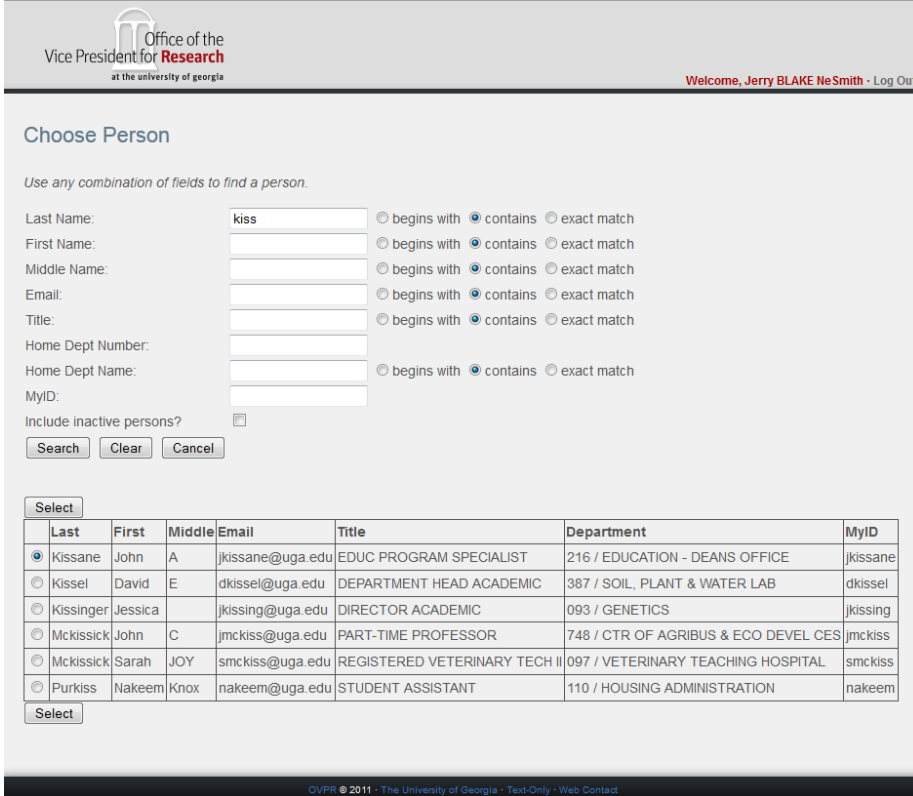
Figure 6. UMD Choose Person Screen.

The Choose Person screen is used in UMD whenever the user needs to find and select a person to fill any role.

To find a person:

1. Enter any combination of search criteria you wish.
    a. Select "Begins with," "Contains" or "Exact" to describe the selection criterion to be used in the search.
    b. The three-digit "Home Dept Number" must be exact, if entered.
    c. The "MyID" must be exact, if entered.
2. Click the Clear button to reset your search criteria to blanks.
3. Click the Cancel button to cancel your search and return to the previous screen.
4. Click the Search button to execute your search. A list of persons who met your search criteria will appear:

Figure 7. Choose Person Screen with Search Results

5. If the person you are searching for appears in the list, click the radio button indicating your selection.
6. If the person for whom you are searching does not appear in the list, modify your search criteria, and try again.
7. Click the Select button to complete your selection.

The UMD Account Roles screen appears, showing the newly designated Account Manager. The Account Manager Proxies section will be blank, because when a new Account Manager is assigned, all Account Manager Proxies are removed and new Account Manager Proxies may be assigned.

ASSIGNING UNIT ACCOUNT MANAGER PROXIES

Account Manager Proxies are assigned much the same as Account Managers, except the process begins by clicking the "Add New" link under the Account Manager Proxies heading.

Account Manager Proxies may be removed, one at a time, by clicking the "Remove" link adjacent to the proxy's name.

MANAGING A UNIT'S EMAIL NOTIFICATIONS

Unless "Deactivated", UMD sends applicants email notifications when

- The applicant's membership application has been received by UMD
- The applicant's membership application has been accepted or rejected by the Unit's administrator

Note that when a membership application is "Deleted" by the Unit's administrator, no email notification will be sent to the applicant. Deletions occur when applications are considered to be invalid and should not be acknowledged in any way.

The content of those notification emails and their activation/deactivation is managed by clicking the "Email Settings" link on the UMD Unit Management Main screen. The UMD Unit EMail Settings screen appears:
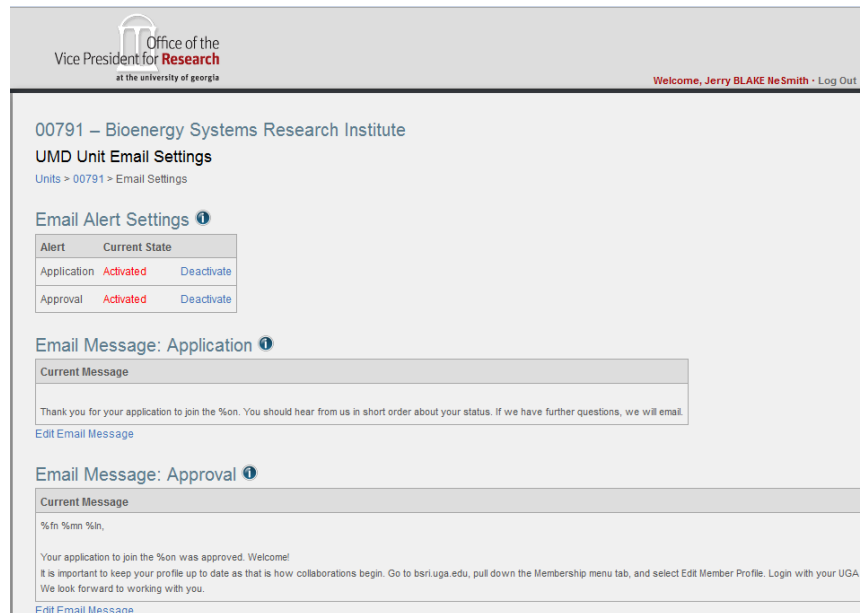
Figure 8. UMD Unit Email Settings Screen
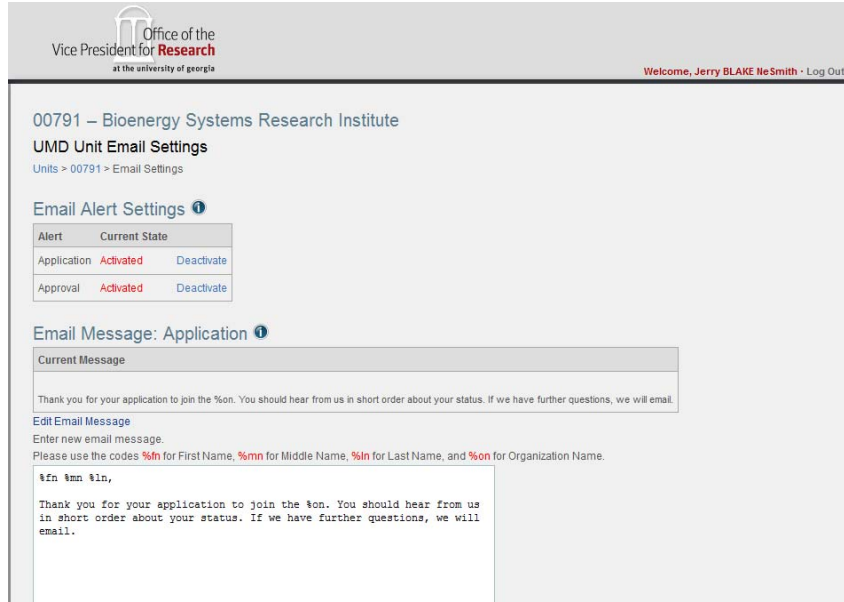
EMAIL ALERT SETTINGS

Email alert for receipt of applications and approval or rejection of applications may each be activated and deactivated in the Email Alert Settings table by clicking "Deactivate" or "Activate" for each type of alert. (It is usually a good idea to deactivate both of these alerts when entering a membership list for an existing organization that already has members when the UMD unit is being set up.)

EMAIL MESSAGE CONTENT

By clicking the "Edit Email Message" links under the Application or Approval Email formatting sections. The email editing screen will appear:

Figure 9. UMD Unit Edit Email Message

Codes are provided for inserting the applicant's first name, middle name, last name and the name of the UMD Unit (Organization Name). If the Approval Email Message is being edited, a code is also provided for inserting the listserve name.

MANAGING MEMBERSHIP TYPES

To manage your unit's list of Membership Types, click the Membership Types button on the UMD Unit Management Main Screen. The Membership Types screen will appear.

Figure 10. UMD Membership Types Screen

Membership Types reflect the unit's decision about different kinds of members (e.g., student, affiliate, associate). At minimum, we recommend having a Membership Type that names the unit leader (e.g., Director) and another membership type that describes others belonging to the unit (e.g., Faculty, Member).

ADDING A MEMBERSHIP TYPE

Three fields must be entered to add a Membership Type:

1. Name: (Required Field) The name to be displayed on your web screen for this membership type and as part of each member's profile. You may change the name of a membership type later using the Edit function.

2. Code: (Required Field) Any alphanumeric text string to be used in the background by the Web Developer/Designer to refer to this Membership Type. This code is not displayed on your website and may not be changed later.

3. Description: (Required Field) Text describing this membership type. The Description may be changed later using the Edit function.

To add a Membership Type to this unit's list, fill in these three fields and click the Add button. The new Membership Type will appear in the list of the unit's Membership Types.

EDITING AN EXISTING MEMBERSHIP TYPE

To change the Name or Description of a Membership Type

1. Click the Edit link, which will display those fields as edit boxes.

2. Edit the Name, Code and/or Description.

3. Click the Save button to save your edited fields.

Note: Membership Types that have been deactivated may not be edited.

DEACTIVATING A MEMBERSHIP TYPE

If a Membership Type is no longer needed, it may be deactivated by clicking the Deactivate button.

Notes:

1. Members assigned to the deactivated Membership Type will remain assigned to that type. The "In Use?" column indicates whether the Membership Type is assigned to active members.

2. New Membership Applications may not include the deactivated Membership Type.
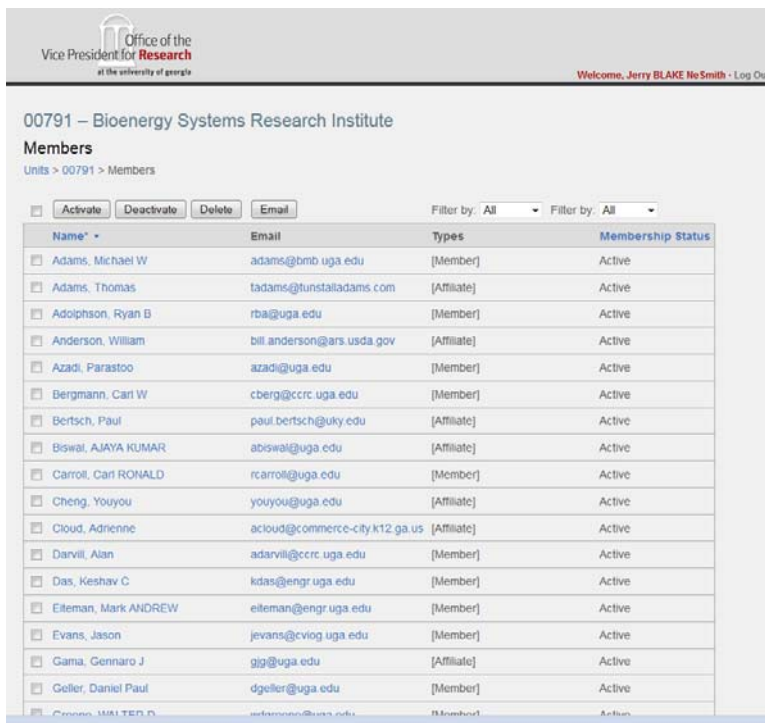
DELETING A MEMBERSHIP TYPE

A Membership Type may be completely deleted from the unit's Membership Type list if the Membership Type is deactivated (Active? = No) *and* the Membership Type is not in use (In Use? = No). If both of these conditions are true, then the Delete button will be displayed.

To Delete the Membership Type, click on the Delete button.

MANAGING MEMBERS

From the Unit Management Main Page, clicking the Members link in the Membership Management group causes the Members page to display:

Figure 11. UMD Members Page

From this page you may edit a member's profile, send email to one or many members, activate, deactivate or delete a member.

APPLY FILTERS TO VIEW OF MEMBER LIST

Using the drop down lists adjacent to the "Filter by" label above the Types and Membership Status columns, you may filter the member list easily.

ACTIVATE, DEACTIVATE OR DELETE MEMBERS
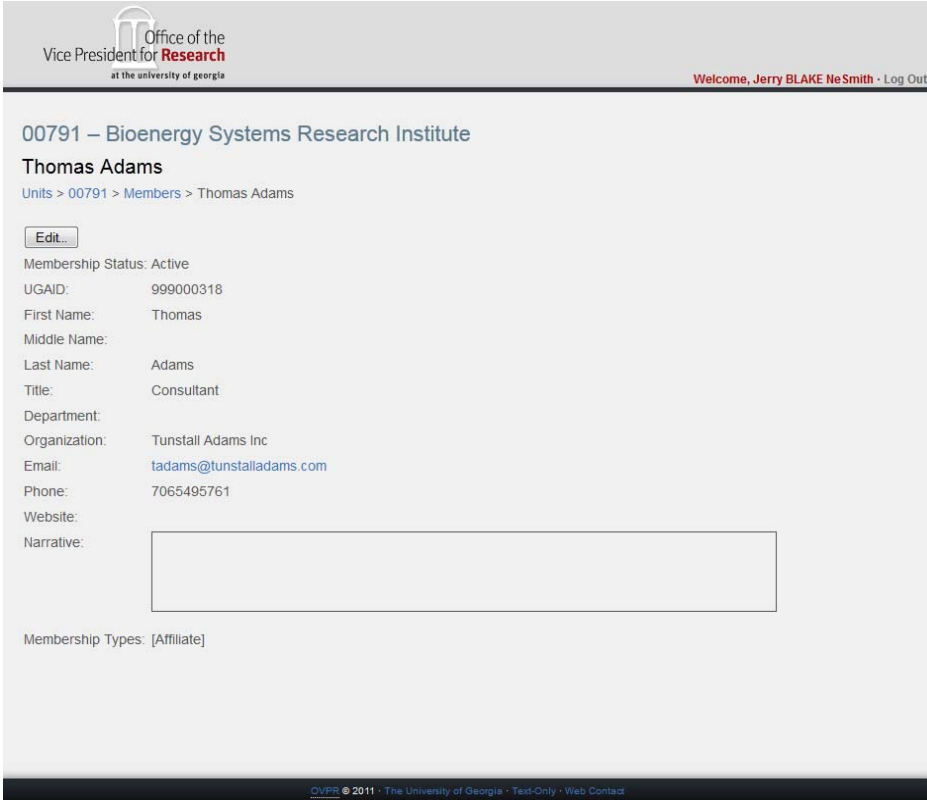
If desired, Filter the Member List. Then select the appropriate member or members in the checkboxes, then click the Activate, Deactivate or Delete button to apply any of those action so the selected member(s).

Notes:

1. Only Active members may be Deactivated, and only Inactive members may be Activated.
2. Inactive members remain on the Member List, but will not be included in web service calls from your website, so will not be displayed as members, until they are reactivated.
3. Deleted members will no longer appear on the Member List and must apply for membership and be accepted, as though they had never been a member, in order to become a member again.

VIEW A MEMBER'S PROFILE

To view and modify a member's profile, click on the member's name. The profile page will appear.

Figure 12. Member Profile Page

By clicking the member's email address, you may send this user a message.

EDIT A MEMBER'S PROFILE

Click the Edit button, the following screen will appear.

Figure 13. Edit a Member's Profile

On this screen you may enter the member's website URL, modify the member's narrative and/or change the member's membership type(s).

Click Save to save your changes or Cancel to leave the page with no changes.

POPULATING AN EXISTING UNIT'S MEMBERSHIP LIST

If a UMD account is being established for an existing unit that already has members, it is not necessary to require the members to submit applications for approval. The UMD Unit Leader, Account Manager, or Account Manager Proxy may populate the UMD unit membership list in the following ways:

- Upload a CSV file of UGA members (batch upload)
- Upload a CSV file of non-UGA members (batch upload)
- Create single applicant records of UGA members
- Create single applicant records of non-UGA members

NOTE: It is usually a good idea to deactivate email notifications during these processes, so that members do not receive unnecessary notification when their applications are loaded and approved. (See Email Alert Settings.)

These methods are shown on the UMD administration screen under Applicant Management.
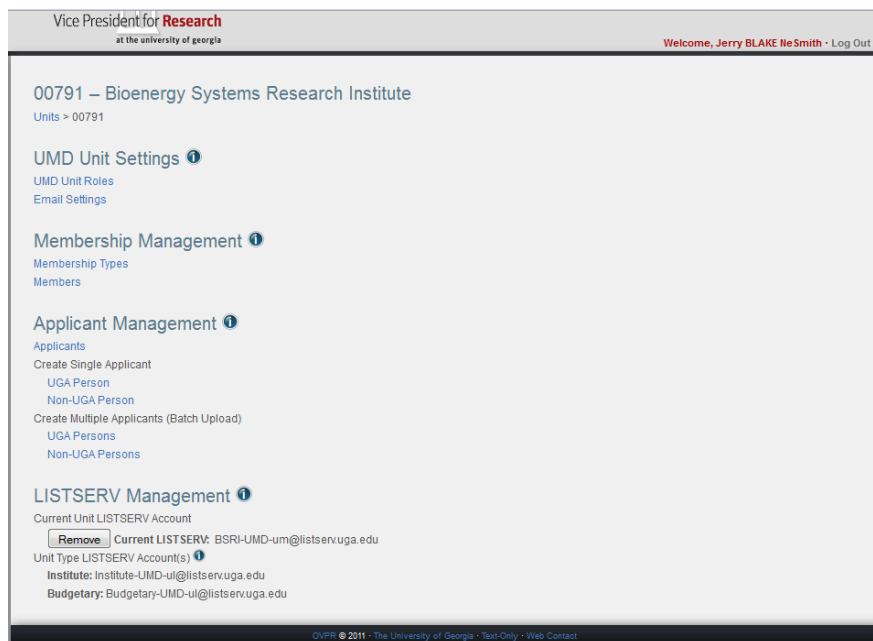
Figure 14. UMD Unit Management Main Screen

CREATE MULTIPLE APPLICANTS (BATCH UPLOAD)

All of a unit's current members that are UGA faculty, staff or student may be loaded using a CSV file using the following steps:

1. Download and populate the UGA or Non-UGA membership batch upload CSV template.
2. Save the template as a CSV file.
3. Upload the CSV file to UMD. This will populate the unit's list of membership applicants.
4. Approve individual membership applicants for membership.

UPLOAD A CSV FILE OF UGA PERSONS

All of a unit's current members that are UGA faculty, staff or student may be loaded using a CSV file using the following steps:

1. Download and populate the UGA membership batch upload CSV template.
2. Save the template as a CSV file.
3. Upload the CSV file to UMD. This will populate the unit's list of membership applicants.
4. Approve individual membership applicants for membership.

To begin this process, from the UMD Account Management Main Screen, click the "UGA Persons" button in the "Create Multiple Applicants (Batch Upload)" group.

The Batch screen will appear.
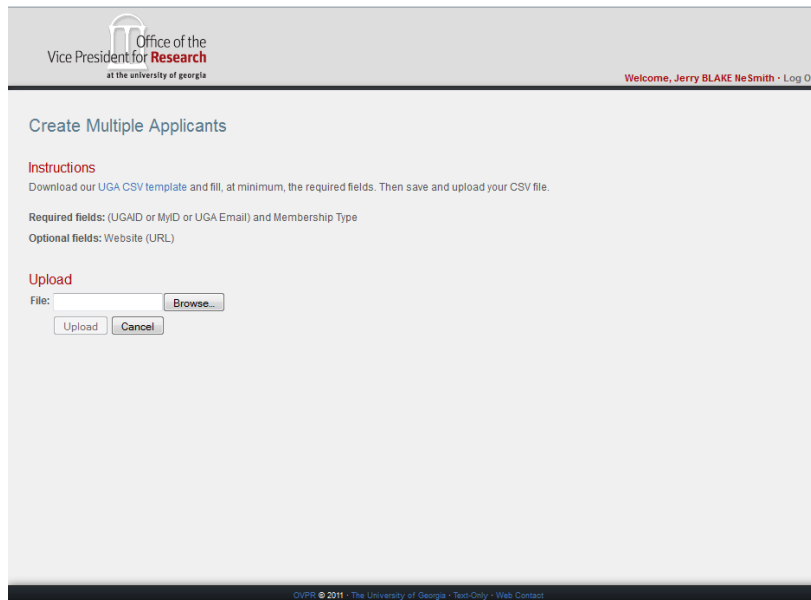
Figure 15. UMD Create Multiple Applicants Screen

Click the "UGAS CSV template" link to upload the UGA persons membership template, shown below:

Figure 16. UGA Batch Upload Template

Fill in the fields, though, only the UGAD, MyID or UGA Email field plus the Membership Type are required. It is advisable to populate only one of the fields for a person.

Save (Save As) a CSV formatted file, then return to the Create Multiple (UGA) Applicants screen to upload the CSV file.
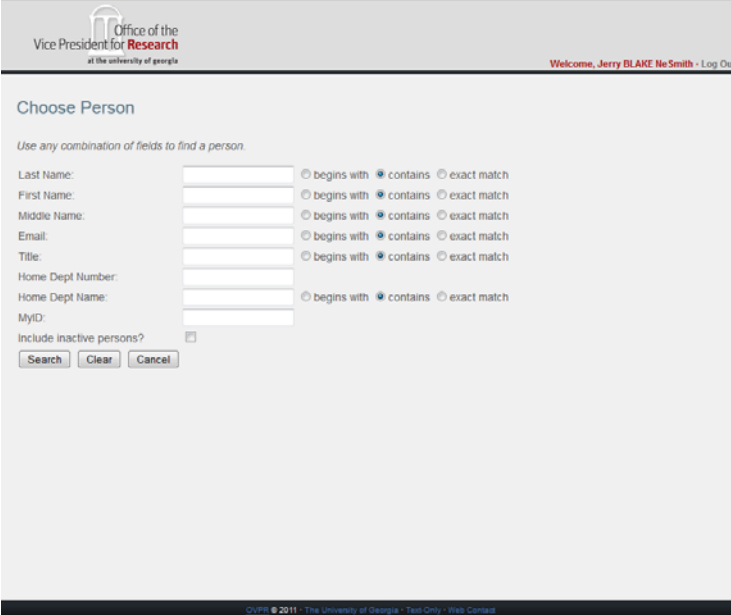
Note: During the upload process, your list is edited for errors. You are notified of any errors and must eliminate all errors before the batch upload will complete.

UPLOAD A CSV FILE OF NON-UGA PERSONS

All of a unit's current members that are non-UGA persons may be loaded using a CSV file using the following steps:

1. Download and populate the non-UGA membership batch upload CSV template.
2. Save the template as a CSV file.
3. Upload the CSV file to UMD. This will populate the unit's list of membership applicants.
4. Approve individual membership applicants for membership.

To begin this process, from the UMD Account Management Main Screen, click the "non-UGA Persons" button in the "Create Multiple Applicants (Batch Upload)" group.

The Batch screen will appear.
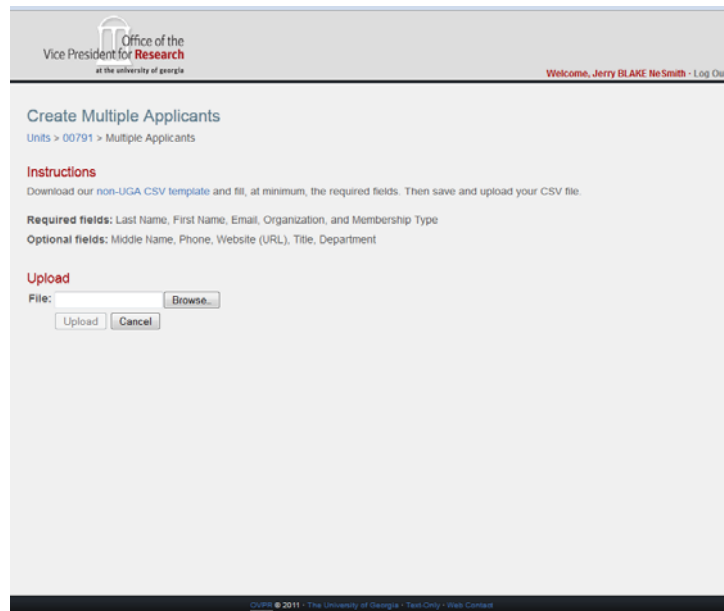
Figure 17. UMD Create Multiple Applicants Screen

Click the "UGAS CSV template" link to upload the non-UGA persons membership template, shown below:

Figure 18. UGA Batch Upload Template

Fill in the fields. Last Name, First Name, Email, Organization and Membership Type are required

Save (Save As) a CSV formatted file, then return to the Create Multiple (UGA) Applicants screen to upload the CSV file.

Note: During the upload process, your list is edited for errors. You are notified of any errors and must eliminate all errors before the batch upload will complete.

CREATE SINGLE APPLICANT

Applicants may be entered one at a time, using a technique for Non-UGA persons and a technique for UGA persons.

CREATE A SINGLE UGA PERSON APPLICANT RECORD

To begin this process, from the UMD Account Management Main Screen, click the "UGA Person" button in the "Create Single Applicant" group. The Choose Person screen will appear.

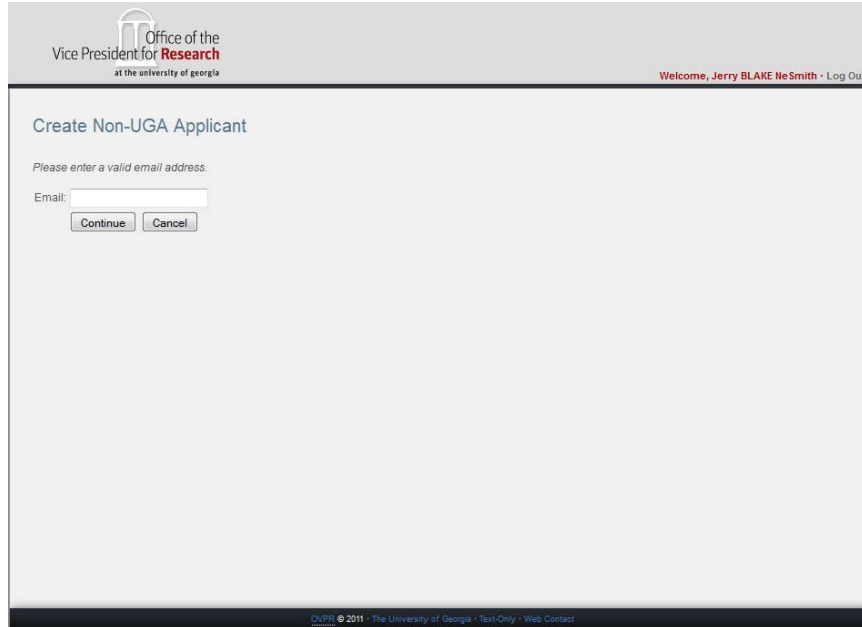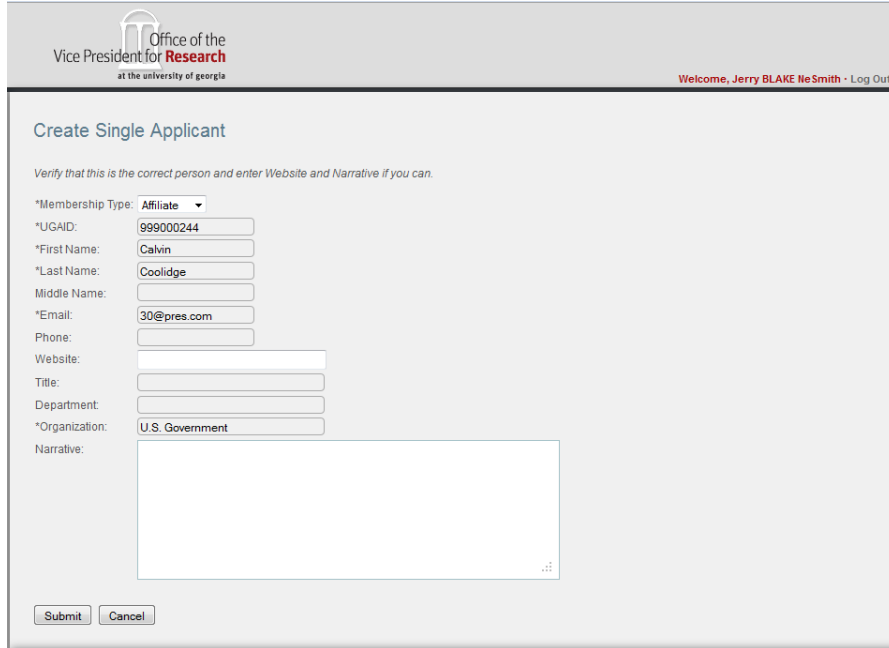**Figure 19. Choose Person Screen**

Enter any combination of search criteria to search for the UGA person. (MyID is an excellent way to search, but must be an exact match. Last Name works well, also, and will give you a selection from which to choose.) After entering your search criteria, click Search. The results of your search will appear at the bottom of your screen:

Figure 20. Choose Person with Results List

If the person for whom you are searching appears, select that person and click Select. The Create Single Applicant screen will appear, with details about the person you selected:

Figure 21. Create Single UGA Applicant Screen

You may enter the URL of the website appropriate for this person as a member of this organizational UMD Unit, enter a narrative, and click Submit. This person will then be an applicant waiting for approval as a member.

CREATE A SINGLE NON-UGA PERSON APPLICANT RECORD

To begin this process, from the UMD Account Management Main Screen, click the "Non-UGA Person" button in the "Create Single Applicant" group.

The Create Non-UGA Applicant screen will appear.

Figure 22. Create Single Non-UGA Applicant Screen

Enter the email address of the non-UGA applicant. (The email address may not be an address that ends with ".uga.edu", as an address ending thus would be an address assigned by UGA to an UGA employee or student. If a UGA email is entered, you will see the error message "UGA email addresses not allowed.") Otherwise, the following screen will appear:

Figure 23. UMD Create Single (Non-UGA) Applicant

If the email address is already registered as a non-UGA affiliate in the OVPR Affiliate System, this next screen will show the (pseudo) UGAID name, organization and department fields that are already attributes of this person. You may add information in the other fields.

If the email address is not already registered in the OVPR Affiliate System, then you must enter information into the required fields and may enter information in the other fields

You may select their Membership Type and enter optional information (Website and Narrative)

MANAGING UMD APPLICANTS

On the UMD Account Management Main screen under the Membership Management heading, click the Applicants link. The Applicants screen appears.

Figure 174. UMD Applicants Screen

Functions:

> Sort by Last Name
>> Click the Name column heading. Each click will result in alternating ascending or descending sorts.
>
> Sort by Applied date
>> Click the Applied column heading. Each click will result in alternating ascending or descending sorts.
>
> Sort by Status (Pending, Accepted, Rejected)
>> Click the Status column heading. Each click will result in alternating ascending or descending sorts.
>
> Filter by Membership Type
>> Use this selection to display only applicants of a certain membership type (or All).
>
> Filter by Membership Applicant Status
>> Use this selection to display only applicants of a certain Application Status (or All).

SENDING EMAIL TO AN APPLICANT

By clicking the email address of any applicant on the Applicants list, your email client's "Send Email" dialog box will launch, allowing you to compose and send an email to the applicant using your computer's email application. You may send an email to multiple applicants by checking the boxes to the left of those to include, then clicking the Email button either above or below the table. (The checkbox above or below the table is a shortcut for checking all applicants in the table.)

APPROVING, DENYING AND REJECTING APPLICATIONS

From the Applicants List screen, you may select any number of Applications by clicking the check boxes, then click the Approve, Deny or Delete button. (You may more closely examine an application by viewing a membership application, as described in the next section.)

THE APPROVE BUTTON

By clicking the Approve button, the following events will occur:

1. The status of the selected Application(s) will change to "Approved."

2. The person(s) will appear in your membership list and their profile(s) will be available.

3. The person(s) will receive an email notification of their membership approval (if the email application approval notification is active)..

THE DENY BUTTON

By clicking the Deny Button, the following events will occur:

1. The status of the selected Application(s) will change to "Denied."

2. Person(s) will receive an email notification of their application for membership denial (if the email application approval notification function is active).

Note: If you do not wish for the Applicant(s) to be notified of their denial, Delete their Application, rather than Deny it.

THE DELETE BUTTON

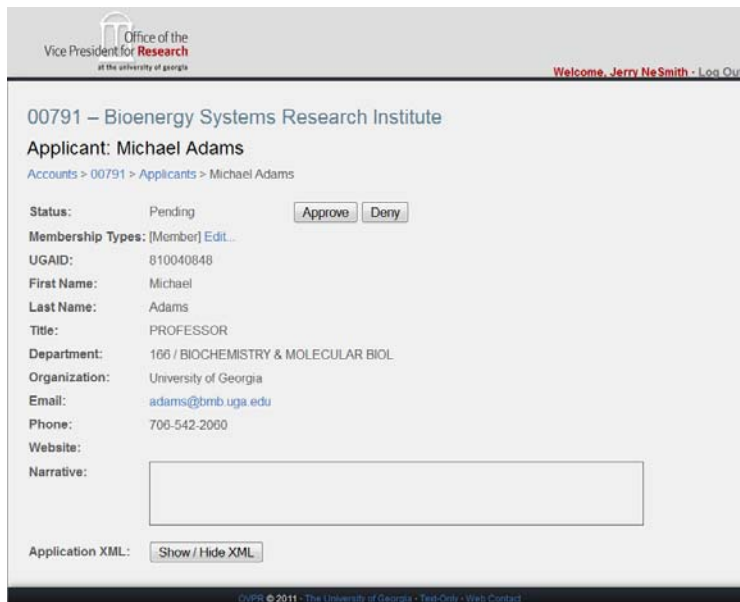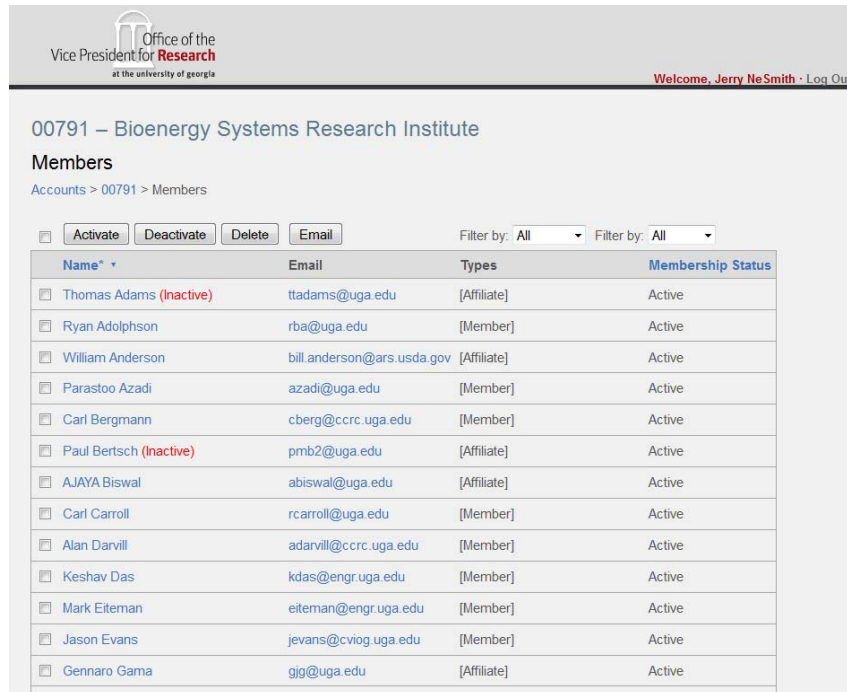By clicking the Delete Button, the following events will occur:

1. The Application(s) will be deleted from the list and may not be retrieved again.

2. The person(s) will receive NO notification, regardless of the email application approval notication setting.

Office of the
Vice President for Research
at the university of georgia

Managing UMD Applicants   Page 31

Note: Use the Delete function for Applications that seem fraudulent so that the perpetrator is not notified of any result of their attempts to cause trouble.

VIEWING A MEMBERSHIP APPLICATION

To view the details of a Membership Application, click on the applicants Name. The Applicant Details screen will appear.

Figure 185. UMD Application Details Screen

SEND EMAIL TO AN APPLICANT

By clicking the email address of the Applicant, your Send Email dialog box will launch, allowing you to compose and send an email to the applicant using your computer's email application.

EDIT AN APPLICANT'S MEMBERSHIP TYPE

You may change the UMD Membership Type for which an applicant is applying by clicking the Edit link. A drop down of this unit's active Membership Types will appear. Select one.

APPROVE AN APPLICATION

By clicking on the Approve button, the following events will occur:

1. The status of the Application will change to "Approved."

2. This person will appear in your membership list and their profile will be available.

3. This person will receive an email notification of their membership application approval, if email application approval is activated.

DENY AN APPLICATION

By clicking on the Deny button, the following events will occur:

1. The status of the Application will change to "Denied."

2. This person will receive an email notification of their membership application denial, if email approval notification is active.

Note: If you do not wish for the Applicant to be notified of their denial, Delete their Application from the application list, rather than Deny it.

Office of the
Vice President for **Research**
at the university of georgia   Managing UMD Applicants   Page 33

MANAGING A MEMBERSHIP LIST

Unit Leaders, Account Managers and Account Manager Proxies may view and manage the list of approved members for a UMD unit. On the Account Management Main screen, under the Membership Management heading, click the Members link. The Members screen will appear.

Figure 196. UMD Members Screen

FILTERING AND SORTING THE MEMBERSHIP LIST

The Membership screen lists all approved members of your unit.

Functions:

> Sort by Last Name
>> Click the Name column heading. Each click will result in alternating ascending or descending sorts.
>
> Sort by Status (Pending, Accepted, Rejected)
>> Click the Status column heading. Each click will result in alternating ascending or descending sorts.
>
> Filter by Membership Type
>> Use this selection to display only applicants of a certain Membership Type (or All).
>
> Filter by Membership Status
>> Use this selection to display only applicants of a certain membership Status (or All).

DEACTIVATE MEMBER(S)

Click the check boxes corresponding to members who you wish to deactivate, then click the Deactivate button.

Notes:

1. A deactivated member will no longer appear in membership lists. Their profile is not available, either.

2. Deactivated members may be re-activated. (See below.)

ACTIVATE MEMBER(S)

Deactivated member(s) may be re-activated by clicking the check box(es) corresponding to those members, then clicking the Activate button.

Notes:

1. A re-activated member will appear in membership lists. Their profile will be available, as well.
2. Active members may be de-activated.

DELETE MEMBER(S)

Inactive or Active member(s) may deleted by clicking the check box(es) corresponding to those members, then clicking the Delete button.

Notes:

1. A Deleted member(s) will no longer appear in membership lists. Their profile(s) will not be available, as well.
2. Deleted member(s) may NOT be re-activated, except through a new Membership Application.

SEND EMAIL TO A MEMBER

From the Members screen, you may send email to individual Member by clicking the email address of any Member, which will launch your email client's send email dialog box, allowing you to compose and send an email to the Member using your computer's email application.

SEND EMAIL TO MORE THAN ONE MEMBER

From the Members screen, you may send email to multiple Members by clicking the check box(es) of those you wish to email, then click the Email button. Your Send Email dialog box will launch, allowing you to compose and send an email to the selected Members using your computer's email application.

VIEW A MEMBER'S PROFILE

By clicking the Name of any Member, the Members Profile screen will appear.

Office of the
Vice President for **Research**
at the university of georgia

Managing a Membership List   Page 35

Figure 207. UMD Member Profile Screen

The Member Profile screen displays all of the UMD information about this Member.

SEND EMAIL TO A MEMBER FROM THEIR PROFILE PAGE

To send an email to a Member from the Member Profiles screen click the email address of the Member. This action will launch your Send Email dialog box, allowing you to compose and send an email to the Member using your computer's email application.

EDIT A MEMBER'S PROFILE

To Edit a Member's profile, click the Edit button. The Edit Member Profile screen will appear, allowing you to edit fields that are NOT managed by authoritative sources. These fields include:

1. Member website.
2. Narrative.
3. Membership Type.

Notes:

1. If a person is a Member of multiple UMD Units, they may have discrete website addresses in each of their UMD Unit Member Profiles.

2. The UMD Unit's website may use UMD web services to allow a website user to search for members using key words. The search will scan the member Narratives, Name, Department, Organization and the custom fields that are collected on the UMD unit's membership application.

UMD SUPERUSER
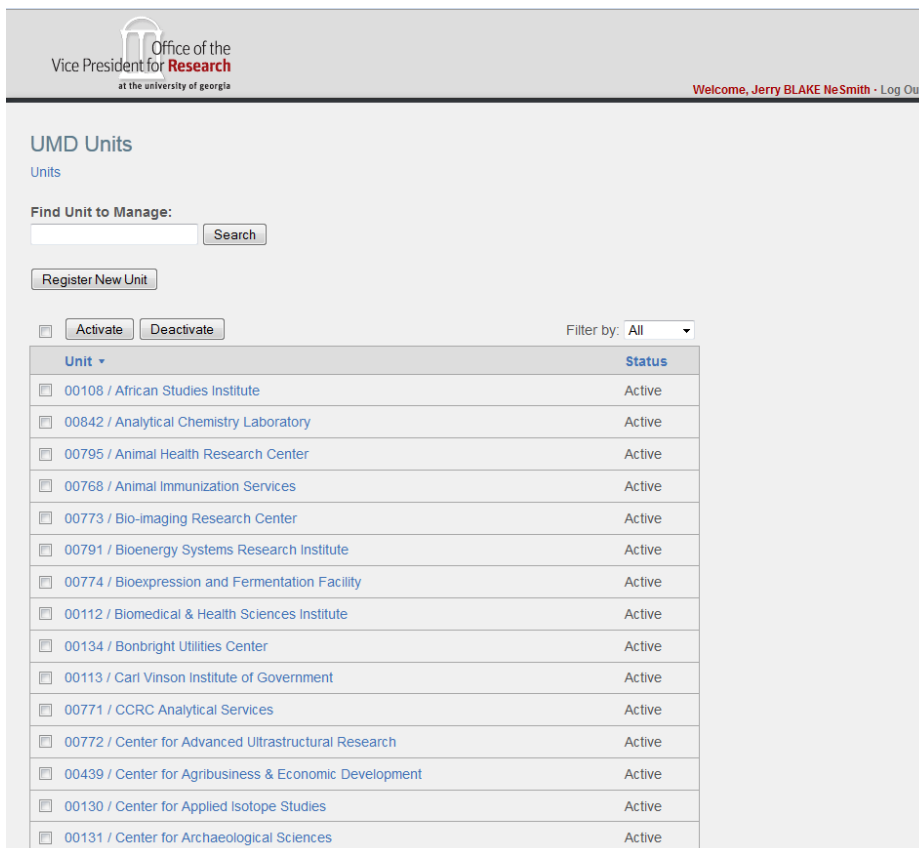
The UMD Super User role allows the user to manage any existing unit account and to register UHD units in UMD.

ASSIGNING A SUPER USER

Only the ROOT user (the UMD application's most privileged user) may assign a person as a UMD Super User. You will be assigned as a Super User only if required by the business processes supporting UMD.

MANAGING UMD ACCOUNTS

After logging in to UMD, if you are a UMD Super User, the UMD Accounts screen will appear with special functions available only to the UMD Super User.

Figure 218. UMD Accounts Screen (Super User)

This screen shows a table of registered UMD accounts.

SORTING AND FILTERING UMD ACCOUNTS LIST

Some simple filtering and sorting functions are available.

SORT BY UNIT NAME

Click the Unit column heading. Each click will result in alternating ascending or descending sorts.

SORT BY STATUS (ACTIVE, INACTIVE)

Click the Status column heading. Each click will result in alternating ascending or descending sorts.

FILTER BY UMD ACCOUNT STATUS

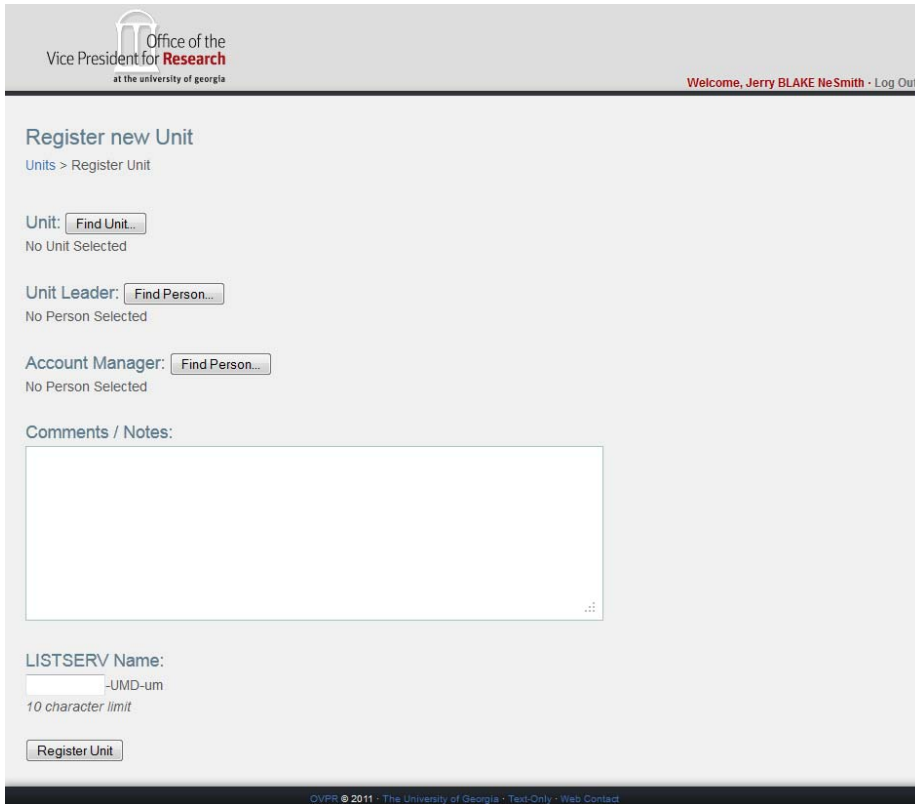Use this selection to display only registered UMD Accounts by Active, Inactive or All.

FIND UMD ACCOUNT TO MANAGE

By entering a text string that is found in the Name of an existing UMD account and clicking the Search button, a list of registered UMD accounts that meet those search criteria will appear on this screen.

REGISTER A NEW UMD ACCOUNT

This function allows the Super User to create a UMD Account for any unit in the Unit Hierarchy Database. To create a UMD Account:

1. Click on the Register New Unit button. The Register New Unit screen will appear.

Figure 229. Register New Unit Screen (Super User)

2. Find the desired unit in UHD for which a UMD account will be created by clicking the Find Unit button. The Select Unit screen appears:
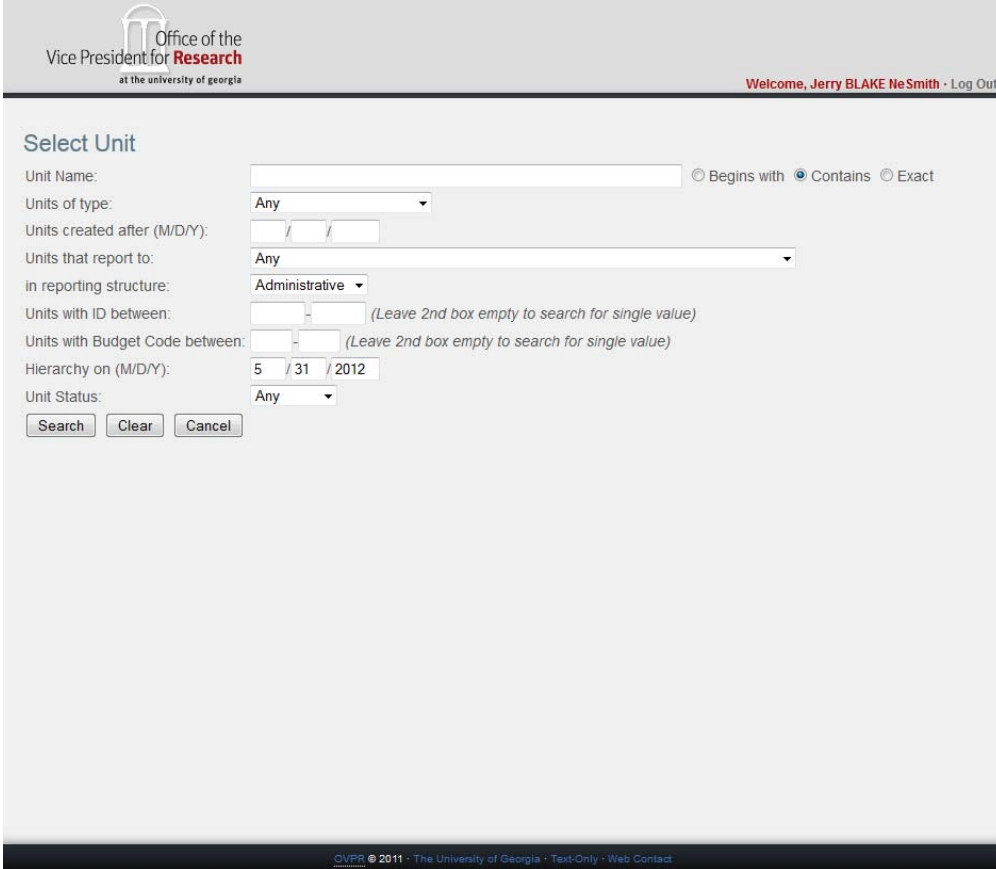
Figure 30. UMD Select UHD Unit Screen

3. Enter any of the search criteria that may be used to search for the UHD unit. After entering the search criteria, click the Search button.
    a. To erase your search criteria, click the Clear button.
    b. To cancel the Unit Search and return to the previous screen, click the Cancel button
    c. After a search, all of the units that meet your search criteria will appear. In the screen below, we searched UHD for all units with "bio" contained in their name that are of Unit Type "Center":

Figure 31. Select Unit Screen with Results

4. If the desired UHD unit appears in the resulting table of UHD units that met your search criteria, select that unit using the radio button and click the Select button.

5. If the desired UHD unit does NOT appear, modify the search criteria and click Search again.

6. After selecting the UHD unit for which a UMD account will be created, the Create UMD Account screen will appear again, showing the Unit you selected:

Figure 32. Register New Unit Screen with Selected Unit Displayed

ASSIGN UMD UNIT LEADER

1. To designate the UHD Unit Leader, on the Register New Unit screen (above) click the Find Person button adjacent to the Unit Leader header.
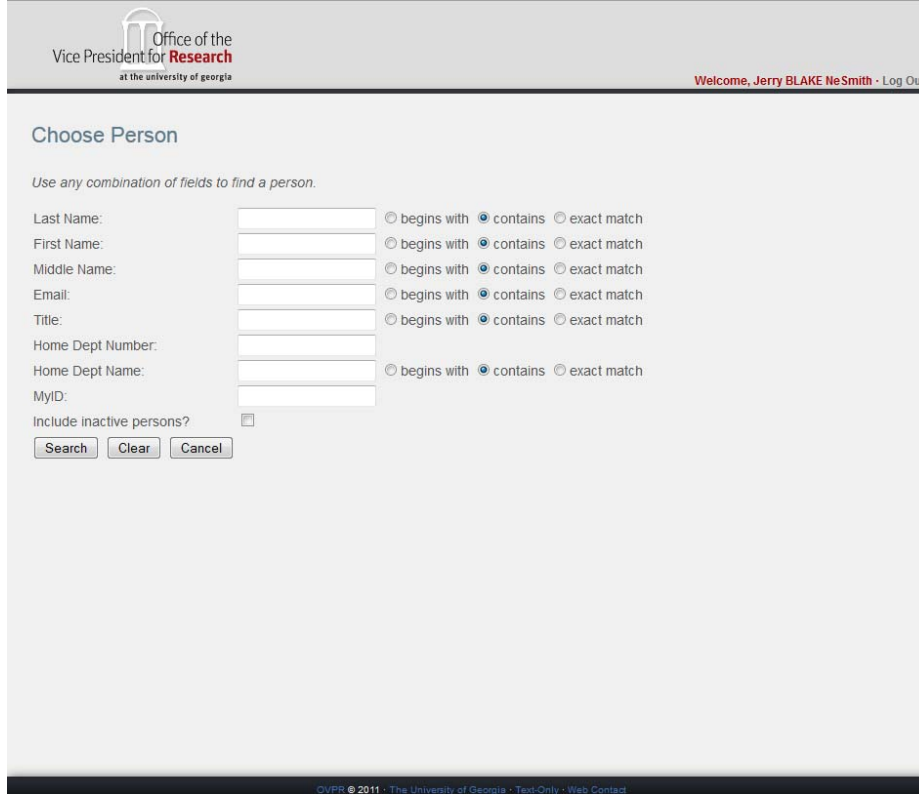2. The Choose Person screen will appear.

UHD/UMD

Figure 23. UMD Choose Person Screen

3. To search for a person, enter any combination of search criteria you wish.
    a. Select "Begins with," "Contains" or "Exact" to describe how you want the selection criterion to be used in the search.
    b. The three-digit "Home Dept Number" must be exact, if entered.
    c. The "MyID" must be exact, if entered.

4. Click the Clear button to reset your search criteria to blanks.
5. Click the Cancel button to cancel your search and return to the previous screen.
6. Click the Search button to execute your search. A list of persons who met your search criteria will appear:

Figure 24. Choose Person Screen with Search Results
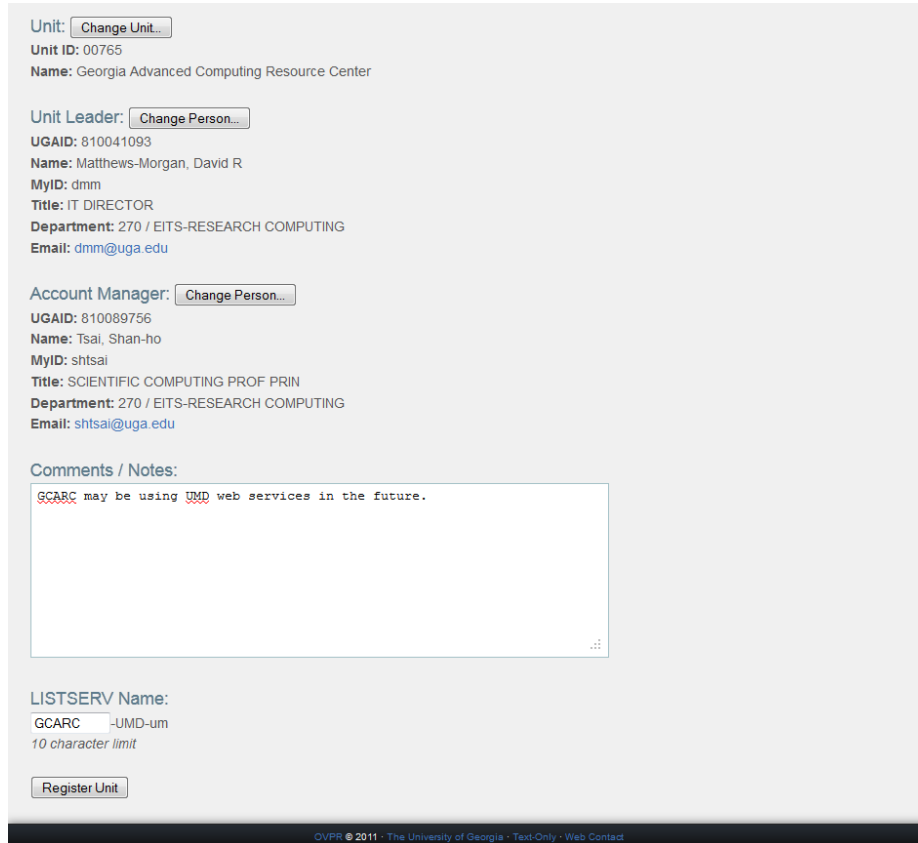
7. If the person you are searching for appears in the list, click the radio button indication your selection.
8. If the person for whom you are searching does not appear in the list, modify your search criteria, and try again.
9. Click the Select button to complete your selection.
10. After selecting the Unit Leader, the Create UMD Account screen will appear again, showing the Unit Leader you selected.

ASSIGN UMD ACCOUNT MANAGER

The Super User is not required to designate an Account Manager (by default this is set as the same person designated as Unit Leader), as the Unit Leader may do so. However, the Super User may assign the Unit's Account Manager by clicking the Find Person button adjacent the Account Manager heading and repeating the steps described above

UHD/UMD

ENTERING COMMENTS ABOUT THE UMD UNIT

The Super User may enter any comments or notes (up to 255 characters) about the unit being registered. These notes are only visible to the UMD Super Users.

Figure 35. Create UMD Account Screen

ENTERING UMD UNIT'S LISTSERV NAME

Under the LISTSERV Name heading, the Super User may enter up to 10 alphanumeric characters to be used as the prefix if the LISTERV account that UMD will create and maintain on behalf of the UMD Unit. Note that the suffix for UMD membership LISTSERVs always "-UMD-um". "um" is an abbreviation for "unit membership".

COMPLETING A UMD UNIT REGISTRATION PROCESS

Click the Register Unit button to complete the unit registration process. The UMD Accounts screen will appear showing all of the UMD registered units.

Office of the
Vice President for Research
at the university of georgia

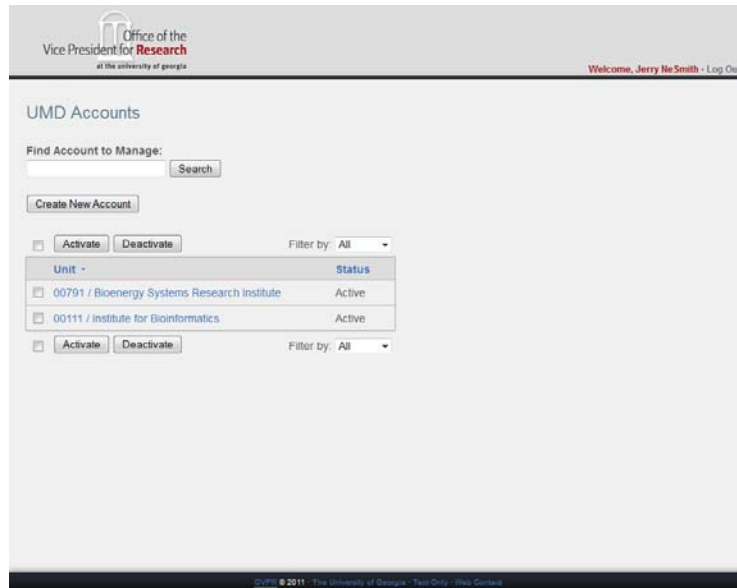UMD Super User   Page 45

Figure 25. UMD Accounts Screen (Super User)

EDITING UMD ACCOUNTS

The Super User may edit a UMD Account from the UMD Accounts screen.

1. Select the UMD Account to be edited.

2. The Edit UMD Account screen appears.

3.   Change the designation of the Unit Leader and/or the Account Manager in a way very similar to the way the UMD Account was created.

DEFINITIONS

BUD_ORG_STRUCTURE	UGA's 3-tier, 3-digit account number hierarchy.
OVPR/LDAP	The Lightweight Directory Access Protocol server implemented by OVPR. Used by software applications implemented in OVPR to authenticate using the UGA LDAP and the OVPR Affiliate LDAP servers as two "branches" in LDAP authentication.
PAULA	OVPR's data middleware of authoritative data regularly collected from UGA's Authoritative Data sources. Includes Persons, Affiliates, Units, Locations and Accounts.
UGA Affiliate	A person who is not a UGA employee and is not a UGA student, but has a relationship with UGA facilitated by the ability to login to UGA software systems.
UGA Authoritative Data	Data originating from data sources deemed to be the official data of record. Authoritative data may come from Human Resources, ID Management, Accounting, Physical Plant or Student Records, for example.
UHD	Unit Hierarchy Database, a web-based application for defining and managing the UGA organization hierarchies.
UHD Unit Type	The type of UGA unit represented by a UHD unit. Unit Types include "Academic", for example, which are all of the academic units at UGA. Other examples include "Center", "Institute", "Student Organization".
UMD	Unit Membership Database, a web-based application for managing memberships in UGA organizational units.
UMD Account Manager	Delegated by the UMD Unit Leader, the Account Manager may manage the UMD membership.
UMD Account Manager Proxy	Delegated by the UMD Account Manager, the Proxy may manage the UMD membership. When the Unit Leader changes the UMD Account Manager, all Proxies are removed.
UMD Admin Panel	The web page in the UMD application which provides navigation to the functions in UMD.
UMD Super User	The highest level administrative user of the UMD application.
UMD Unit Leader	The highest level administrative user of a UHD organizational unit.
UMD Unit Roles	Roles assigned to specific tasks associated with a designated UMD unit (currently Unit Leader, Account Manager, Account Manager Proxies)
UnitID or UHD UnitID	The 5-digit unit identifier assigned to any organizational unit in UHD