MA Online Reports and MA Rebate Report Access Instructions

Setups that need to be done before accessing the reports:
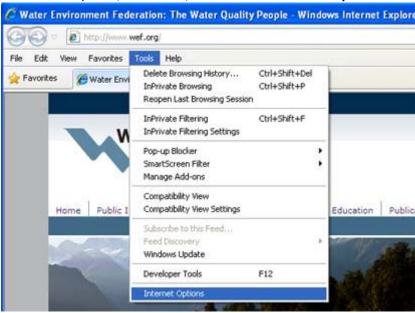
Internet Explorer 8:

Please note that you will need to upgrade your version of Internet Explorer (IE) to version 8 if you haven't already done so. You will not be able to save your reports in a lower version of IE.

Change IE Security Settings to Enable Automatic Prompting for File Downloads

Note: Changing this setting will allow you to download files from ALL Internet sites. Based on your web browsing habits, this setting may present a security risk to your computer.

1. Open Internet Explorer.
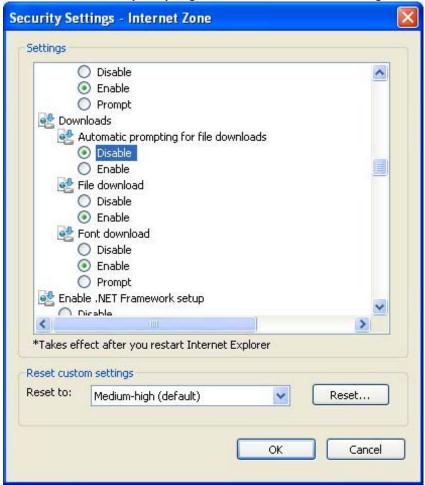2. In Internet Explorer, click **Tools**, and then click **Internet Options**.

3. Under the **Security** tab, select **Internet**.

4. Under **Security level for this zone**, clock **Custom Level**.

5. In the Security Settings Panel, scroll down to the **Downloads** section.
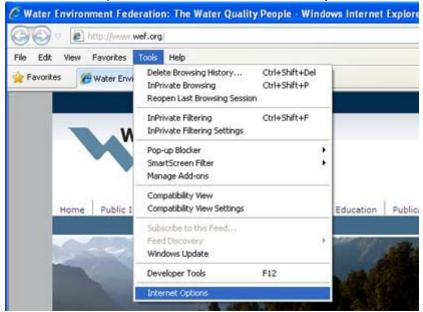Under the **Automatic prompting for file downloads** subheading, click **Enable**.

6. Click **OK**, on both the **Security Settings** and **Internet Options** panels.

7. Close all of your active browser windows so the changes take effect.

Configure IE to recognize a website as a "Trusted site"

You will need to add a websites to the trusted sites so that you are able to view and download the reports. Below is an example on how to add a trusted site. This is the site that you need to add:

https:\\www.e-wef.org

1. In the Internet Explorer **Tools** menu, select **Internet Options**.

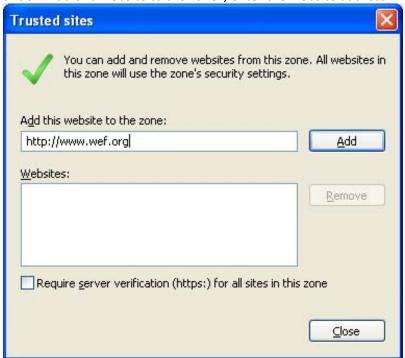2. In the Internet Options panel, select the **Security** tab.

3. Select Web content zone, **Trusted sites**.

4. Click the **Sites** button and the Trusted sites panel will open.

5. Under "Add this website to the zone", enter the website address.

6. Click the **Add** button (make sure the check mark is NOT checked next to Require Server Verification (https:) for all sites in this zone.)
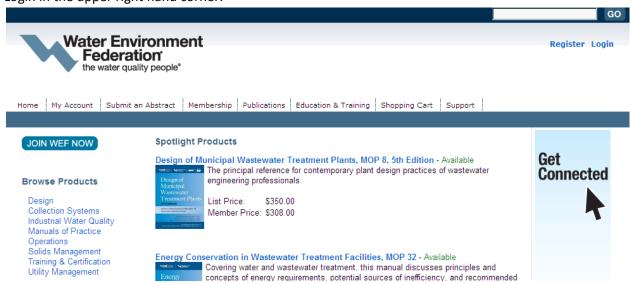7. Click **Close** on the Trusted sites panel and **OK** on the Internet Options panels.

Firefox:
Only older versions of Firefox will work with the MA Online reports. Those versions have the Word and Excel add-ons installed. Due to a copyright issue, the newer versions of Firefox don't have the Word and Excel add-ons available.
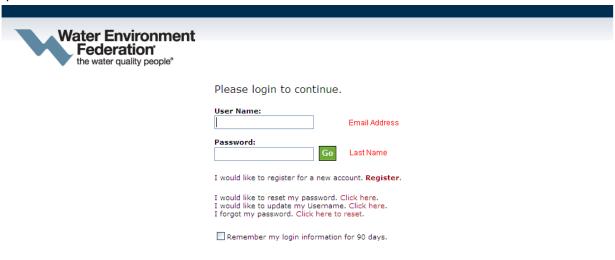
Accessing MA Online and MA Rebate Reports:

URL: https://www.e-wef.org

1. Go to the above URL
2. Login in the upper right hand corner.

3. On the screen below enter in your User ID and your password. Your USER ID defaults to the email address we have on file for you and your password is your last name. If your last name does not work then click on the reset password link and follow the directions in the email sent to you.

4. Hover over the reporting menu item. There are two categories, the WEF Report Access, which are the data reports, and the WEF Rebate reports.

WEF Report Access:

Click on WEF Report Access to list the MA Online reports.

Common Definitions:

Current Members – members who's membership order end date + 3 months grace is less than or equal to today.

Membership Revenue YTD – based on a calendar year of January – December

Membership Revenue MTD – based on the current month

Expired Members in Current Month – Members who have expired in the current month

Grace Members in Current Month – Members who are in a grace status in the current month

New Members – Members who are in their first year of membership

Expired Members – Members who have expired within the last 3 months of the current month

Reports:

Brief Descriptions:

MA Negative Change Report

The purpose of this query is to retrieve groups of changes associated to the members of the Member Association (MA). This query will list the following groups:

- Members with Bad Addresses
- Members who are Deceased
- Members who have Transferred Out of the MA
- Members who are in Expired Status

MA Address Label Query

The purpose of this query is to retrieve a listing of current, active members of the Member Association (MA). The query will be manipulated by each of the MA's to provide the information required per MA. *This report is currently in re-development and will be released at a later date.*

MA Address Label File

The purpose of this report is give the MA the ability to "push a button" and produce a file output that can then be used for manipulation. This report should display all active members (with no parameters for choices – and exclude bad addresses. The report will be developed as an online report that has the ability to be saved into multiple formats (excel and .csv).

MA Address Change Report

The purpose of this report is to retrieve address change information associated to the members of the Member Association (MA) and to display both the old address and the new address.

MA Demographic Report

The purpose of this query is to retrieve customer demographic and membership related information on the Member Association (MA) members. The query will be manipulated by each of the MA's to provide the information required per MA.

Membership MA Dashboard

The purpose of this report is to provide in an overview of information to the MA representative on current information related to their members. This dashboard will be interactive - the MA will be able to click on specific information and drill down to the details of the charts/information that is displayed.

MA Email Report

The purpose of this query is to retrieve an email listing of current, active members of the Member Association (MA). The query will be manipulated by each of the MA's to provide the information required per MA.

MA Membership Campaign Report

The purpose of this query is to retrieve membership demographic information for the MA's to conduct marketing efforts. This report should allow the MA to "slice and dice" the data in the query or to filter once exported to excel.

Membership Data Dump

The purpose of this report is to provide the Member Association the ability to "push a button" and produce a flat file of customer and order detail information on their members. Typically this file is uploaded into the MA's database – or this file of data acts as the Membership Roster for that MA. This report excludes members with cancelled, deceased and transferred out status.

Committee Roster (Currently noted as MBR9001)

The purpose of this report is to provide WEF's Member Associations with a listing of their members and which committees they serve and in what position.

Membership Roster (Currently noted as MBR9002)

The purpose of this report is to provide WEF's Member Associations with an appealing roster of their members. It will not be used for exporting to other formats, but instead as a roster to view all current, active members.
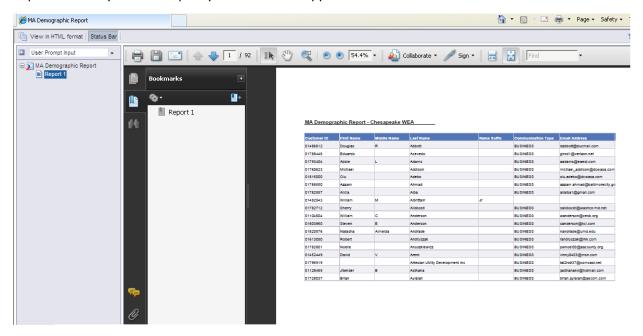
Reports with Prompts:

Your MA is your MA abbreviation, i.e. CA = California, NY = New York. Your Access code (password) is the same as was used in the TIMSS online Crystal reports. If you need a code sent to you, please contact csc@wef.org. Codes are unique per each MA.

MA Email Report

Membership Category - T he process selects your members, if their membership category equals the one you selected.
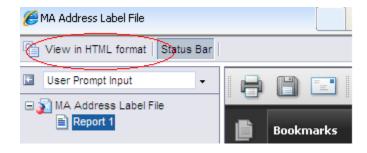
Running and saving the reports:

Double click on the report that you would like to run and enter any information that the report prompt requests. After you run a report your screen will appear as such:
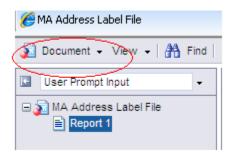

The reports are in a PDF format and you can save them in this format or change formats.

To save or change formats please follow these steps:

Click on the View in HTML box

It changes to

Document with a drop down option.

Click on the drop down next to the document box as seen above and then click "Save to My Computer As" and select your format.

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