

## MA Online Reports and MA Rebate Report Access Instructions

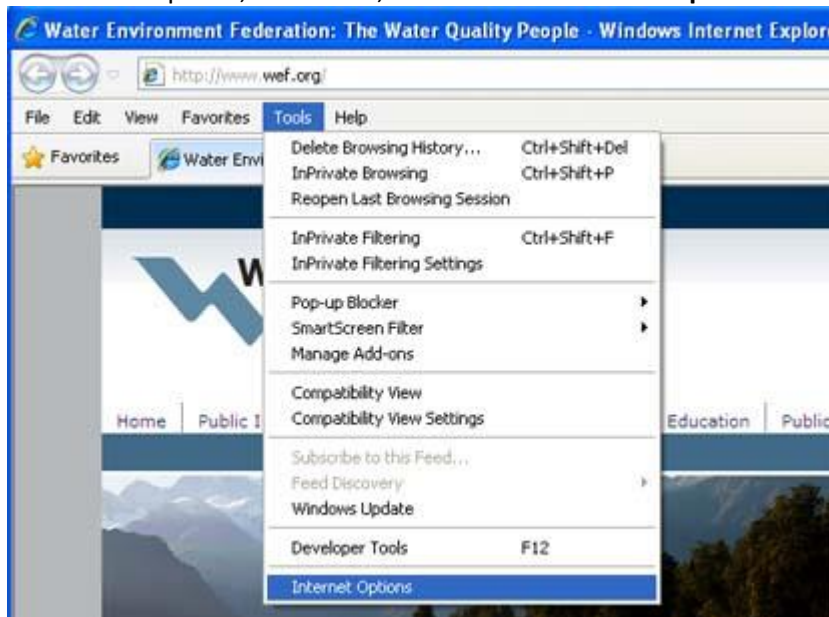
### Setups that need to be done before accessing the reports:

#### Internet Explorer 11:

##### 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.

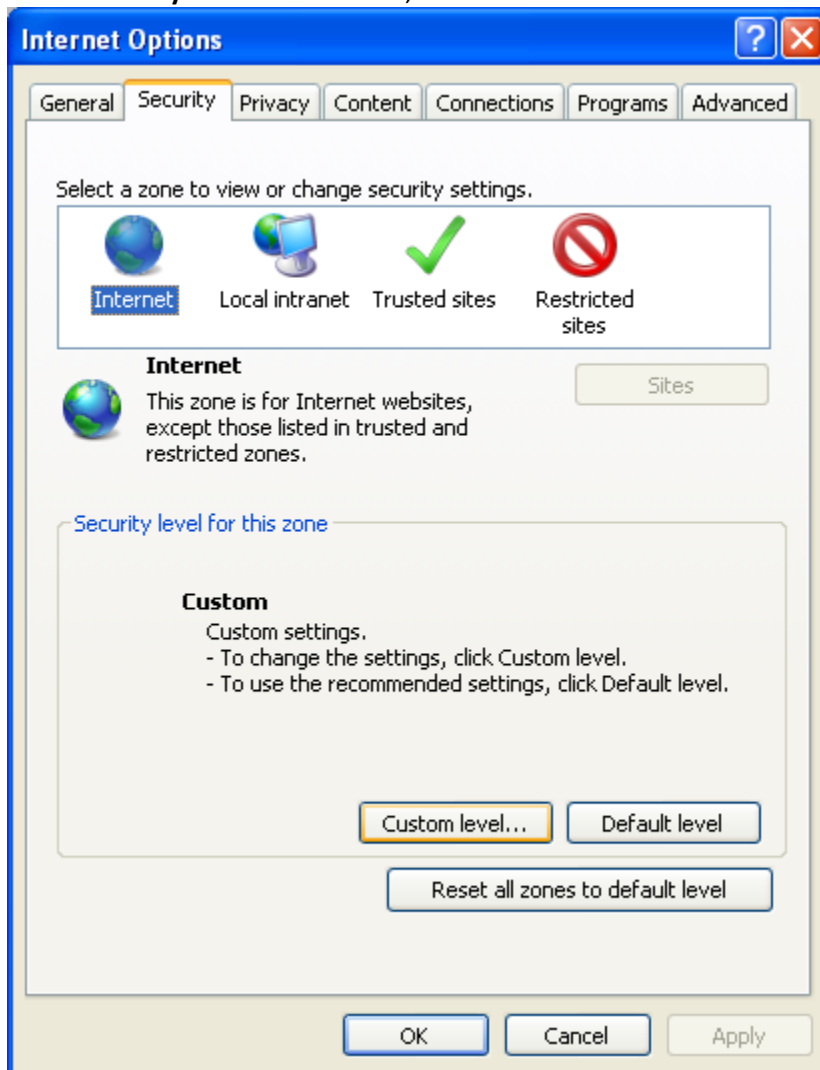
1. Open Internet Explorer.
2. In Internet Explorer, click **Tools**, and then click **Internet Options**.



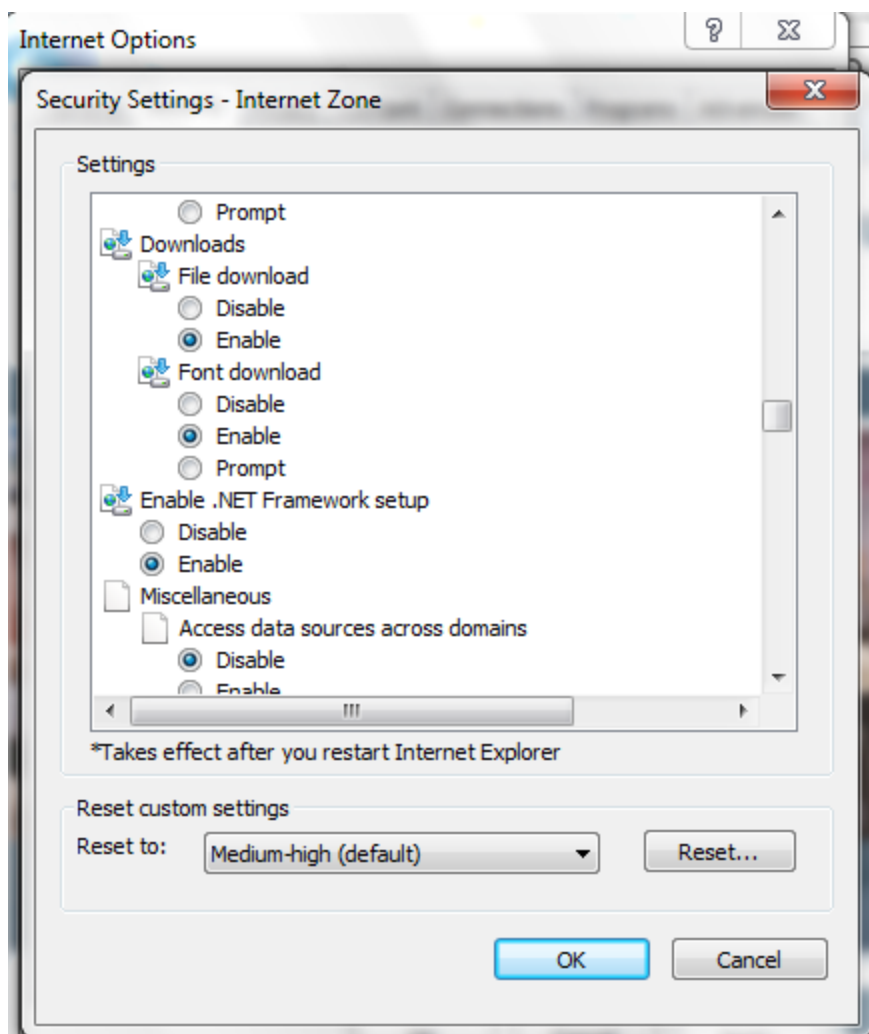
3. Under the **Security** tab, select **Internet**.



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



5. In the Security Settings Panel, scroll down to the **Downloads** section. Under **File download**, click **Enable**.

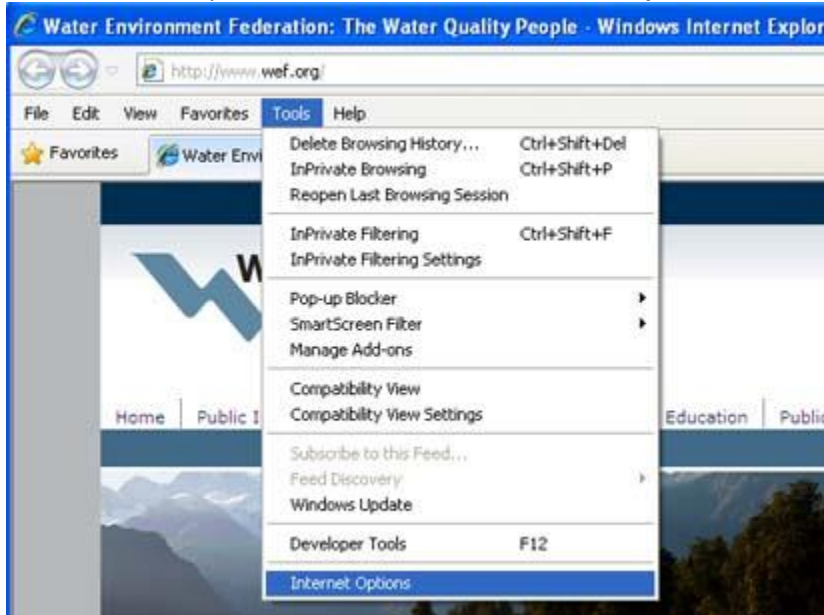


6. Click **OK**, on both the **Security Settings** and **Internet Options** panels.
7. Close all of your active browser windows so the changes take effect.

### **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.

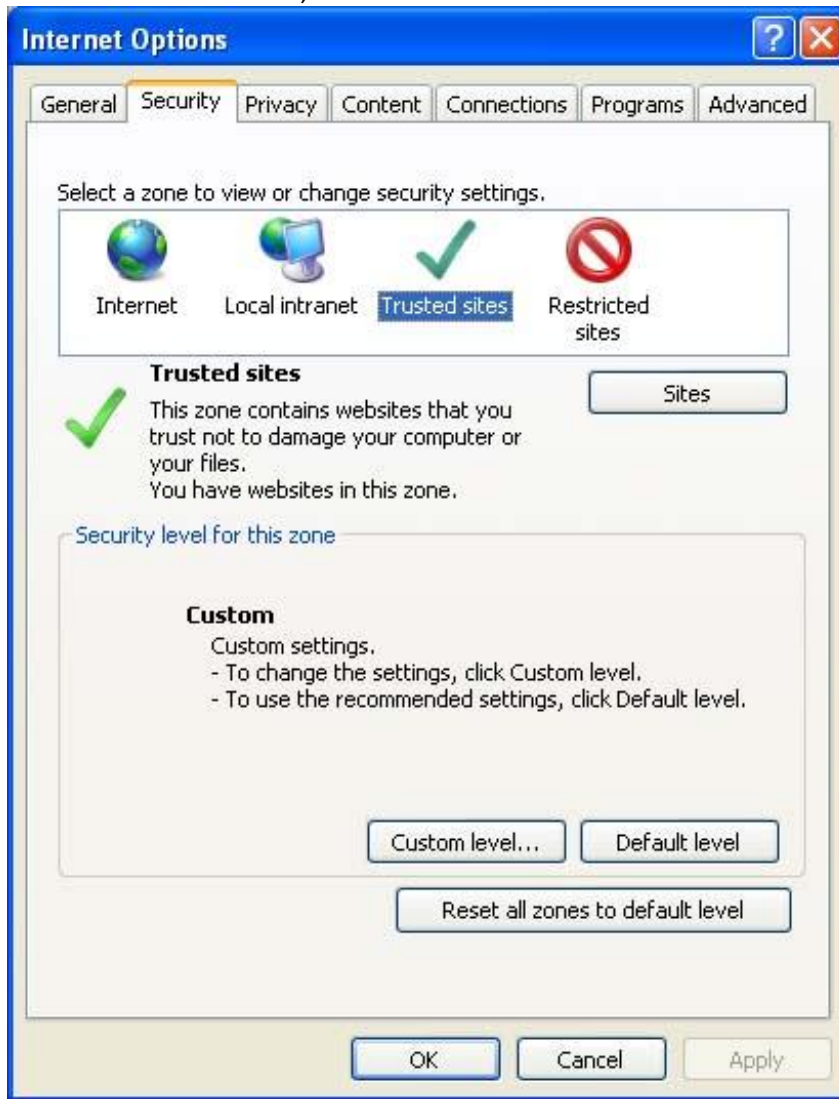
1. In the Internet Explorer **Tools** menu, select **Internet Options**.



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

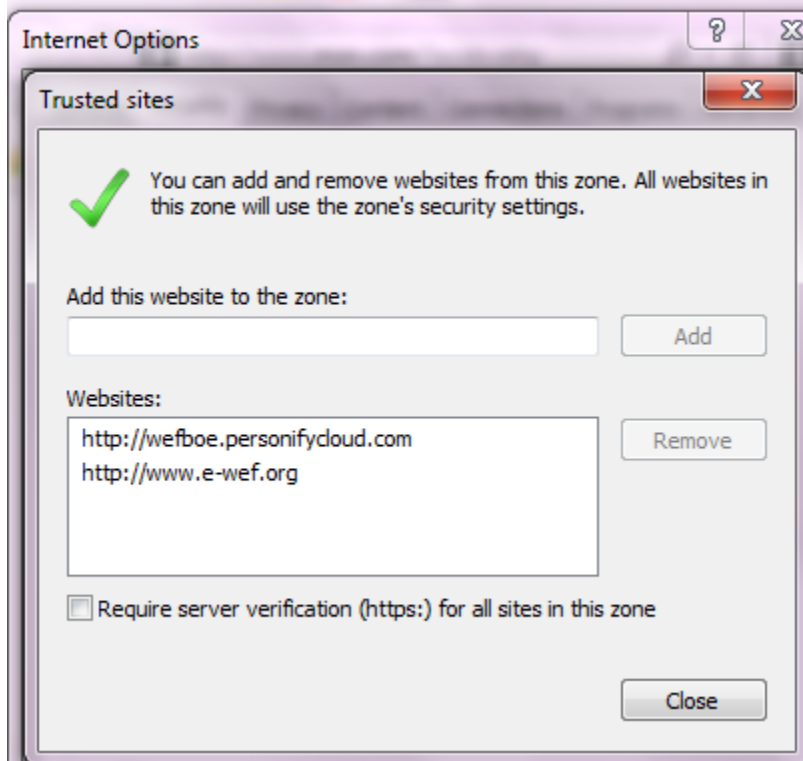


3. Select Web content zone, **Trusted sites**.



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

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



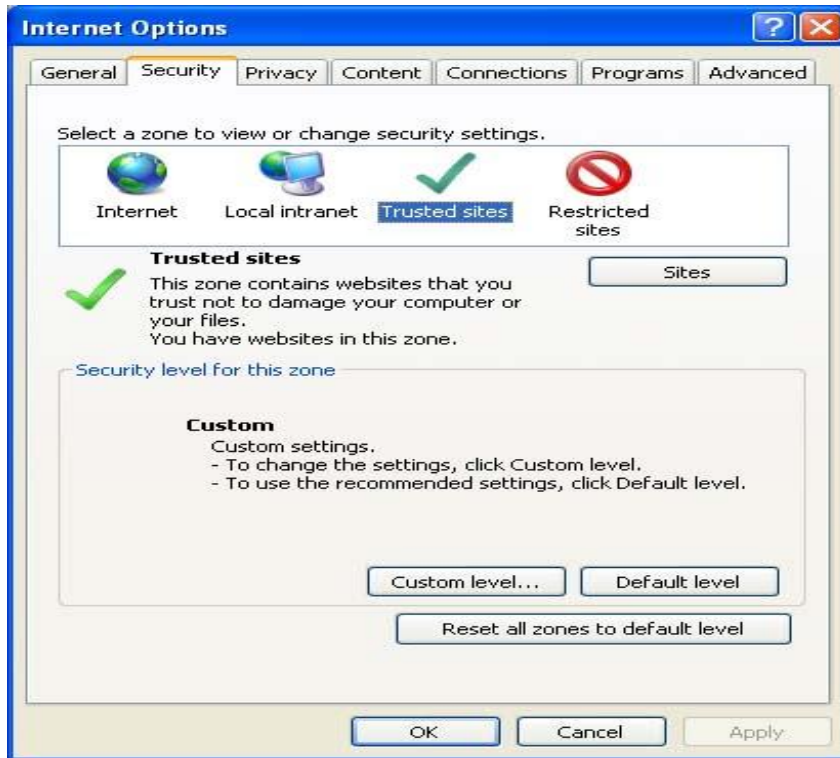
6. Click the **Add** button (make sure the check mark is NOT checked next to Require Server Verification (https:) for all sites in this zone.) Add the sites listed below:

<http://www.e-wef.org>

<http://wefboe.personifycloud.com>

7. Click **Close** on the Trusted sites panel .

8. Click on Custom Level



9. Click Ok and close the browser for the changes to take effect.

**Other browsers:**

Version 54.0 of Chrome and Version 50.0 of Firefox will work will work with the MA Online reports.

## 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.

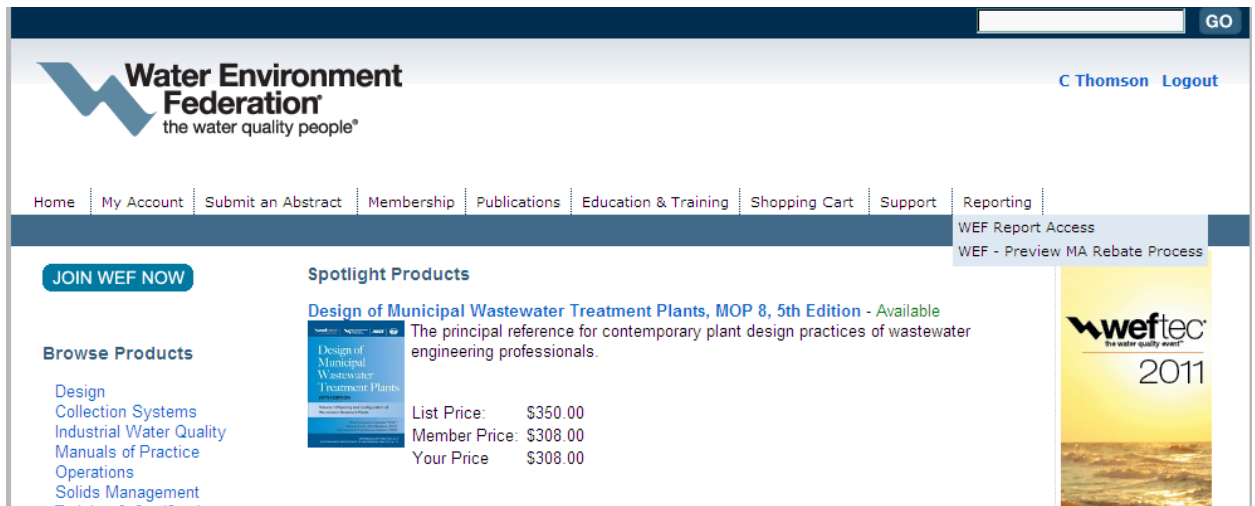
The screenshot shows the homepage of the Water Environment Federation (WEF). At the top left is the WEF logo with the tagline "the water quality people". To the right of the logo are links for "Register" and "Login". Below the logo is a navigation menu with links for "Home", "My Account", "Submit an Abstract", "Membership", "Publications", "Education & Training", "Shopping Cart", and "Support". A "GO" button is located in the top right corner. The main content area features a "JOIN WEF NOW" button, a "Browse Products" section with a list of categories (Design, Collection Systems, Industrial Water Quality, Manuals of Practice, Operations, Solids Management, Training & Certification, Utility Management), and a "Spotlight Products" section. Two products are highlighted: "Design of Municipal Wastewater Treatment Plants, MOP 8, 5th Edition" and "Energy Conservation in Wastewater Treatment Facilities, MOP 32". A "Get Connected" banner with a mouse cursor is on the right side.

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.

The screenshot shows the login page of the Water Environment Federation website. It features the WEF logo and tagline at the top left. The main heading is "Please login to continue." Below this are two input fields: "User Name:" and "Password:". The "User Name" field has a red "Email Address" label to its right. The "Password" field has a green "Go" button and a red "Last Name" label to its right. Below the input fields are three links: "I would like to register for a new account. Register.", "I would like to reset my password. Click here.", and "I would like to update my Username. Click here." Below these links is a checkbox labeled "Remember my login information for 90 days." The page has a dark blue footer bar at the bottom.



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.

- [MA Negative Change Report](#)
- [MA Email Report](#)
- [MA Demographic Report](#)
- [MA Dashboard](#)
- [MA Membership Campaign Report](#)
- [MA Committee Roster](#)
- [MA Member Roster](#)
- [MA Address Change Report](#)
- [MA Members of UPP](#)
- [MA Expired Members Report](#)
- [MA Negative Change Report with Expiration Date](#)
- [MA Members License Information](#)
- [New MA Membership Data Dump](#)
- [MA New Members](#)
- [MA Membership Data Dump](#)

### 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 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 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.

### **MA 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.

### **MA Committee Roster**

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.

### **MA Membership Roster**

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.

### **MA New Members Report**

The purpose of this report is to provide the Member Association a listing of new members based on dates selected by user.

### **MA Members of UPP**

The purpose of this report is to provide the Member Association a listing of members that belongs to Utility Partnership Program (UPP)

MA Members License Information

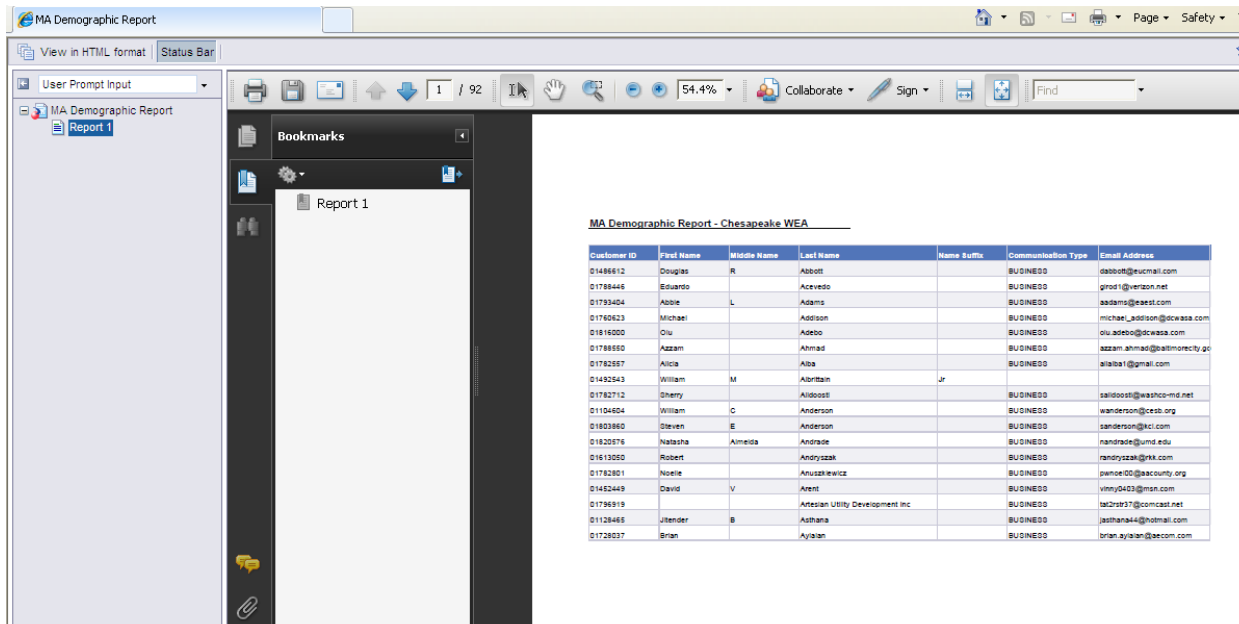
The purpose of this report is to provide the Member Association a listing of members and the state that they have been board certified.

Reports with Prompts:

**Your MA is your MA abbreviation, i.e. CA = California, NY = New York. Your MA Access code (password) is assigned per each MA. If you need a code sent to you, please contact [madawag@wef.org](mailto:madawag@wef.org).**

## 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:



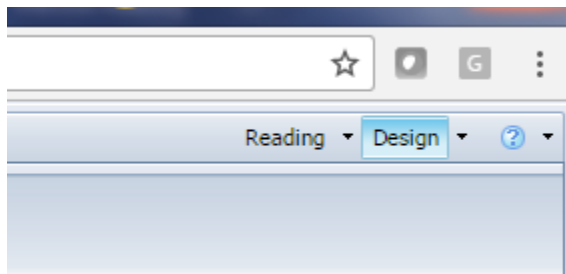
The screenshot shows a web browser window titled "MA Demographic Report". The address bar shows "View in HTML format" and "Status Bar". The left sidebar contains a "User Prompt Input" dropdown and a "Bookmarks" section with "Report 1" listed. The main content area displays a table titled "MA Demographic Report - Chesapeake WEA".

Customer ID	First Name	Middle Name	Last Name	Name Suffix	Communication Type	Email Address
01486612	Douglas	R	Abbott		BUSINESS	dabbott@eucmail.com
01788446	Eduardo		Acevedo		BUSINESS	grod1@verizon.net
01793404	Abbie	L	Adams		BUSINESS	aadams@earth.com
01746623	Michael		Addison		BUSINESS	michael_addison@dcwasa.com
01816000	Olu		Adebo		BUSINESS	olu.adebo@dcwasa.com
01788550	Azzam		Ahmad		BUSINESS	azzam.ahmad@atlmorecity.go
01782597	Alicia		Alba		BUSINESS	alibaba1@gmail.com
01492543	William	M	Albritain	Jr		
01782712	Sherry		Aldoost		BUSINESS	saldooost@washco-md.net
01104604	William	C	Anderson		BUSINESS	wanderson@ceb.org
01803860	Steven	E	Anderson		BUSINESS	sanderson@kci.com
01820576	Natasha	Amelia	Andrade		BUSINESS	nandrade@umd.edu
01613050	Robert		Andryszak		BUSINESS	randryszak@nra.com
01782801	Noelle		Anuszewicz		BUSINESS	panoec00@acounty.org
01452449	David	V	Arent		BUSINESS	viny003@msn.com
01796919			American Utility Development Inc		BUSINESS	ba2r2927@comcast.net
01128468	Jitender	B	Ashtana		BUSINESS	jaashana4@comcast.com
01726037	Brian		Ayajan		BUSINESS	brian_ayajan@eccom.com

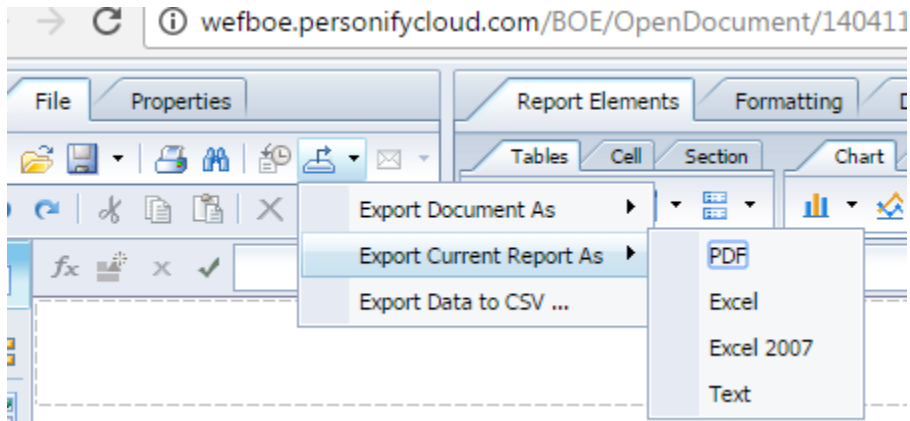
The reports are in a PDF format and you can save them in this format or change formats.

To save or change formats please follow these steps:

Click on Design located on the upper right corner



The screen changes into

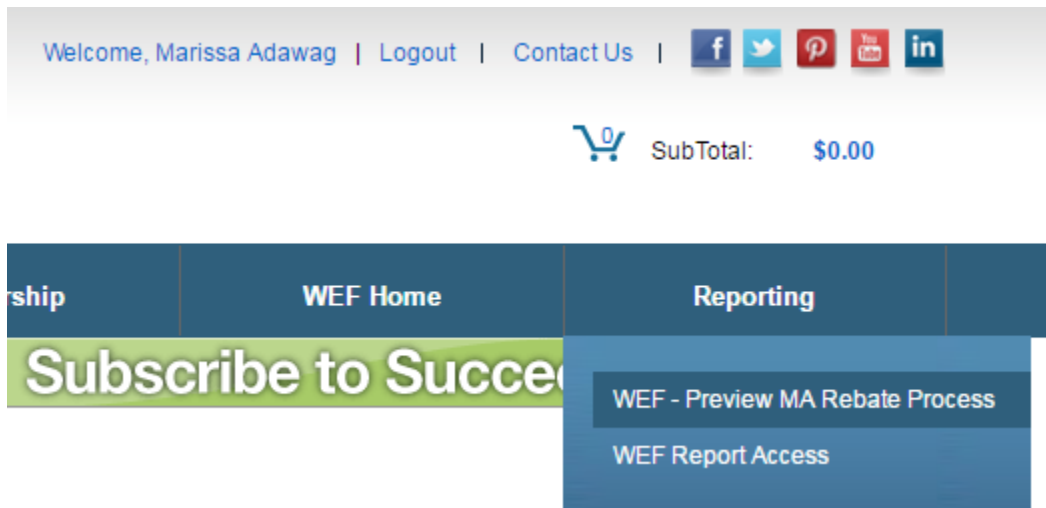


Click on the drop down, select Export Document As (Excel, Excel 2007) or Export Data to CSV.

Save to your computer, for Chrome Users it will be automatically downloaded to your preferred location.

### MA Rebate Reports

To access rebate files, click option under Reporting Tab “WEF Preview MA Rebate Process”



It will display all available rebate reports for the year in descending order

MA Rebate files (Select the link to download)
<a href="#">10/1/2016</a>
<a href="#">9/1/2016</a>
<a href="#">8/1/2016</a>
<a href="#">7/1/2016</a>
<a href="#">6/1/2016</a>
<a href="#">5/1/2016</a>
<a href="#">4/1/2016</a>
<a href="#">3/1/2016</a>
<a href="#">2/1/2016</a>
<a href="#">1/1/2016</a>
<a href="#">12/1/2015</a>
<a href="#">11/1/2015</a>

Double click on the file to open it. Report can be save in excel or csv format.