**Local Section and Division E-Rosters**

**Contents**

[Downloading the Roster 2](#_bookmark0)

[Using the Roster Files 2](#_bookmark1)

[Adjust Column Widths 4](#_bookmark2)

[Sorting the Data 5](#_bookmark3)

[Making Labels 6](#_bookmark4)

[eRoster File Layout - Explanations 8](#_bookmark5)

[eRoster File Layout Activity Roster - Explanations 10](#_bookmark6)

[Activity Key 11](#_bookmark7)

# Downloading the Roster

### This site contains several files:

### Full Membership Roster

* + Activity Roster
	+ Demographic Report
	+ Student Chapters Report
	+ Community Associates Report

### The roster files can be converted to Excel to create mailing labels, generate email distribution lists, or target a specific population of your local section, technical division, or international chapter membership.

### The files are comma-delimited format, which can be imported into many spreadsheet and database tools such as Excel. To import the file, you will have to refer to the software's instructions for opening comma-delimited files. NOTE: if your software identifies the file as Fixed Width, please change the setting to **Delimited**.

# Using the Roster Files

### Opening the file using Microsoft Excel

### Open Excel

### From File, choose open

### Change the Files of Type box at the bottom or side of the Open Window to read “Text Files”.



### Navigate to the folder where you saved your roster file, select the file and click Open.

### After you've opened the file, Excel will launch the Text Import Wizard:

### **Step 1** Select data type: Delimited Click on next



## Step 2

### Select Tab and Comma as Delimiters Click on Next



## Step 3

### Ensure that Customer\_ID and Primary\_Zipcode fields in the Data Preview is selected. Change Column Data format to Text (this will ensure that leading zeros in Customer\_ID are maintained).



### Click on Finish

### Save the file as a standard spreadsheet Choose File, Save As, and save the data format to preferred file name.

# Adjust Column Widths

### Click on the upper left corner of the spreadsheet This will highlight the entire file Position your mouse between columns A&B and double-click.

#### Before:

#### After:

# Sorting the Data

### Click on the upper left corner of the spreadsheet. This will highlight the entire file.

### From the menu, chose Data, Sort.

### Select the data field you would like to sort and click OK.

### The sort window allows you to select which field you want to sort the data. You can sort up to three categories at one time with sub-sorts.

# Making Labels

### A mailing label template is designed for use with Avery Labels 5962. This label format will allow you to print 14 labels per page. Please download and save the mailing label template to the same directory as your roster files.

### Please note: the template will default to a specific data source that is not on your computer. To change the data source, please follow the below steps:

### Open the Mailing Label Template

### A Dialog Box will prompt you to run SQL Command. Click Yes

### You will receive an error message that says “Operations can not be completed due to database engine failure.

### Click OK to find a new Source

### Navigate to folder where you saved your converted roster file and select the file.

### Click Open. The label merge template will look like this:



### The mail merge toolbar should display at the top of the screen.



### If this does not appear, select: Tools, Letters and Mailings, Show Mail Merge Toolbar

### Click on one of the following icons to merge the labels to a new document or directly to your printer:



### Please email olsa@acs.org for questions or comments.

#### 7

# eRoster File Layout - Explanations

##### Field order Field Name Explanation

* 1. CUSTOMER\_ID ACS Membership Number
	2. PREFIX Dr. Mrs. Mr., etc
	3. FIRST\_NM
	4. MIDDLE\_NM Middle Name or Middle Initial
	5. LAST\_NM
	6. SUFFIX Jr. Sr., III, etc.
	7. DESIGNATION Ph.D, Ed, MD, etc
	8. GENDER M, F, (null)
	9. BIRTH\_YR
	10. PRIMARY\_ADDR\_TYPE H = Home, W = Work
	11. PRIMARY\_COMPANY\_NM
	12. PRIMARY\_DEPT\_NM/MAILSTOP
	13. PRIMARY\_ADDRESS\_LINE#1
	14. PRIMARY\_ADDRESS\_LINE#2
	15. PRIMARY\_CITY
	16. PRIMARY\_STATE
	17. PRIMARY\_ZIPCODE
	18. PRIMARY\_COUNTRY
	19. PRIMARY\_ONHOLD\_FL Y = Address is "on hold"
	20. PRIMARY\_ONHOLD\_TYPE Reason Address is "on hold"
	21. WK\_PREF\_ADDR\_FL
	22. WK\_COMPANY\_NM

Y = Work is Preferred Address N = Work is not Preferred Address

* 1. WK\_DEPT\_NM/MAILSTOP Department Name and/or Mailstop
	2. WK\_ADDRESS\_LINE#1
	3. WK\_ADDRESS\_LINE#2
	4. WK\_CITY
	5. WK\_STATE
	6. WK\_ZIPCODE
	7. WK\_COUNTRY
	8. WK\_ONHOLD\_FL Y = Address is "on hold"
	9. WK\_ONHOLD\_TYPE Reason Address is "on hold"
	10. WK\_PHONE WITH EXT Phone Number with Extension
	11. WK\_FAX WITH EXT Fax Number with Extension
	12. HM\_PREF\_ADDR\_FL Y= Home is Preferred Address, N = Home is not Preferred Address.
	13. HM\_ADDRESS\_DEPT\_NM/MAILSTOP
	14. HM\_ADDRESS\_LINE#1
	15. HM\_ADDRESS\_LINE#2
	16. HM\_CITY
	17. HM\_STATE
	18. HM\_ZIPCODE
	19. HM\_COUNTRY

(Normally blank field for home address, may exist for students and those in the military)

* 1. HM\_ONHOLD\_FL Y = Address is "on hold"
	2. HM\_ONHOLD\_TYPE Reason Address is "on hold"
	3. HM\_PHONE WITH EXT
	4. EMAIL\_ADDR
	5. EMAIL\_CHG\_DT Date Present indicates email address has been changed
	6. EMAIL\_PROMO\_OPT\_OUT\_FL
	7. MEMBER\_CATEGORY

Y = Do not use email for Promotional Mailings; OK to send regular section mailings (newsletters, meeting notices, etc.)

Regular, Associate, Affiliate, etc

* 1. NA\_MEMBER\_TYPE Regular, Student, National Affiliate, Emeritus
	2. MEMBER\_PACKAGE\_CODE
	3. CHAP\_EFFECTIVE\_DT Effective Date of Paid Chapter Membership
	4. CHAP\_EXPIRE\_DT\_ACT Expire Date of Paid Chapter Membership
	5. LS\_ID (Division Roster Only) Local Section ID for Division Member
	6. CHAP\_ORIG\_JOIN\_YR Chapter Join Year
	7. NA\_ORIG\_JOIN\_YR National Membership Join Year
	8. FREE\_DIVISION\_FL (Division Roster Only)

##### CHAP\_PAY\_STATUS\_CD\*

##### NA\_PAY\_STATUS\_CD\*

##### CHAP\_YRS\_SVC\*

##### NA\_YRS\_SVC\*

##### CHEMISTRY DEGREE\*

##### NON CHEMISTRY DEGREE\*

Y= Free Division for 1st year of Membership

* 1. DIR\_SURVEY\_OPT\_IN\_FL Y= May include member information in directory
	2. ALPHA\_SORT Last Name, First Name, MI
	3. AGFD Y = Member of Division
	4. ANYL Y = Member of Division
	5. BIOL Y = Member of Division
	6. CARB Y = Member of Division
	7. CELL Y = Member of Division
	8. CHED Y = Member of Division
	9. CINF Y = Member of Division
	10. BMGT Y = Member of Division
	11. COLL Y = Member of Division
	12. COMP Y = Member of Division
	13. ENVR Y = Member of Division
	14. FLU0 Y = Member of Division
	15. FUEL Y = Member of Division
	16. HIST Y = Member of Division
	17. I&EC Y = Member of Division
	18. INOR Y = Member of Division
	19. MEDI Y = Member of Division
	20. BIOT Y = Member of Division
	21. NUCL Y = Member of Division
	22. ORGN Y = Member of Division
	23. PMSE Y = Member of Division
	24. AGRO Y = Member of Division
	25. PETR Y = Member of Division
	26. PHYS Y = Member of Division
	27. POLY Y = Member of Division
	28. PROF Y = Member of Division
	29. RUBB Y = Member of Division
	30. CHAS Y = Member of Division
	31. GEOC Y = Member of Division
	32. SCHB Y = Member of Division
	33. CHAL Y = Member of Division
	34. TECH Y = Member of Division
	35. TOXI Y = Member of Division

##### \*Field Not Currently Available

# eRoster File Layout Activity Roster - Explanations

CUSTOMER\_ID ACS Membership Number

CHANGE\_REASON\_CD See Description Below

ACTIVITY See Description Below

PREFIX Dr. Mrs. Mr. etc.

FIRST\_NM MIDDLE\_NM LAST\_NM

SUFFIX Jr. Sr. III, etc.

DESIGNATION Ph.D, Ed, MD etc.

PRIMARY\_ADDR\_TYPE Home, Work PRIMARY\_COMPANY\_NM PRIMARY\_DEPT\_NM/MAILSTOP PRIMARY\_ADDRESS\_LINE#1 PRIMARY\_ADDRESS\_LINE#2

PRIMARY\_CITY PRIMARY\_STATE PRIMARY\_ZIPCODE PRIMARY\_COUNTRY

PRIMARY\_ONHOLD\_FL Y= Address on hold PRIMARY\_ONHOLD\_TYPE Reason Address is on hold WK\_PRF\_ADDR\_FL Work is preferred address (Yes or No) WK\_COMPANY\_NM

WK\_DEPT\_NM/MAILSTOP WK\_ADDRESS\_LINE#1 WK\_ADDRESS\_LINE#2 WK\_CITY

WK\_STATE WK\_ZIPCODE WK\_COUNTRY WK\_ONHOLD\_FL WK\_ONHOLD\_TYPE

HOME\_PRF\_ADDR\_FL Home is preferred address (Yes or No) HOME\_DEPT\_NM/MAILSTOP

HM\_ADDRESS\_LINE#1 HM\_ADDRESS\_LINE#2 HM\_CITY

HM\_STATE HM\_ZIPCODE HM\_COUNTRY HM\_ONHOLD\_FL HM\_ONHOLD\_TYPE EMAIL\_ADDR

EMAIL\_CHG\_DT Date of email change EMAIL\_PROMO\_OPT\_OUT\_FL Y= Do not use for Promotion Mailings;

OK to send regular mailings (newsletters, meeting notices, etc)

MBR\_TERMINATE\_DT Date of Termination

# Activity Key

### Address Change – Address changes that occurred during roster period. DD – (Deceased) Deceased members or affiliates during roster period.

### New – Members who have joined the division or local section during the reporting period. Includes members that are new to the Society as well as existing members that joined the division or local section during the reporting month.

### RI – (Reinstated) National Members who have reinstated during roster period.

### TD – (Terminate Division) Includes division cancellations, free-division expirations and terminations due to non-payment.

### TN – (Terminate National) Local Section Roster Only. Member termination of national membership also terminates local section membership.

### TO – (Transfer Out) Members that have changed local section due to address change or other request.

### Note: Members may be listed multiple times in the activity roster if more than one activity applies.