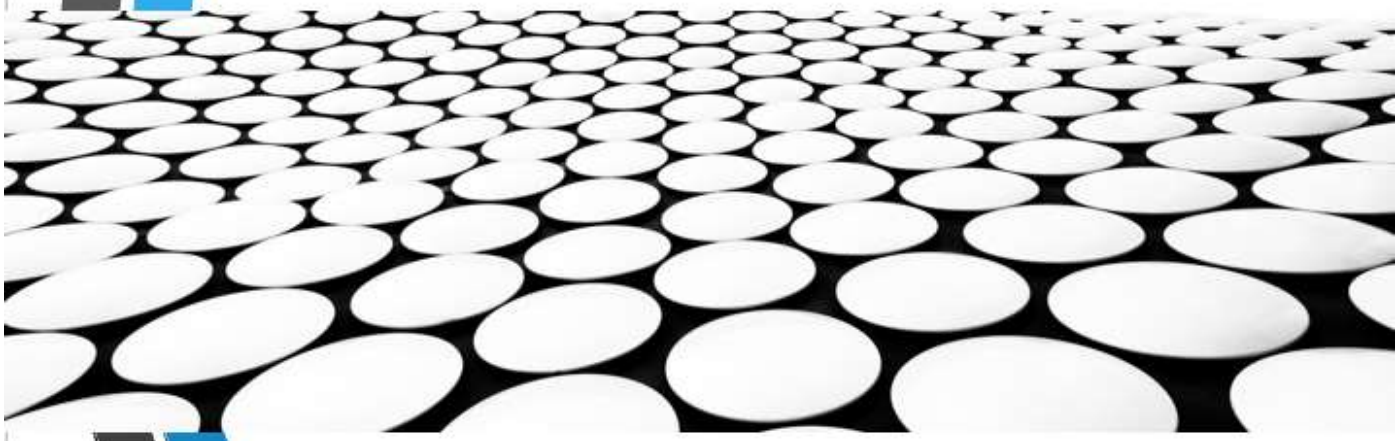
Association for Career and Technical Education

ACTE®

State Chapter Module



December 2023

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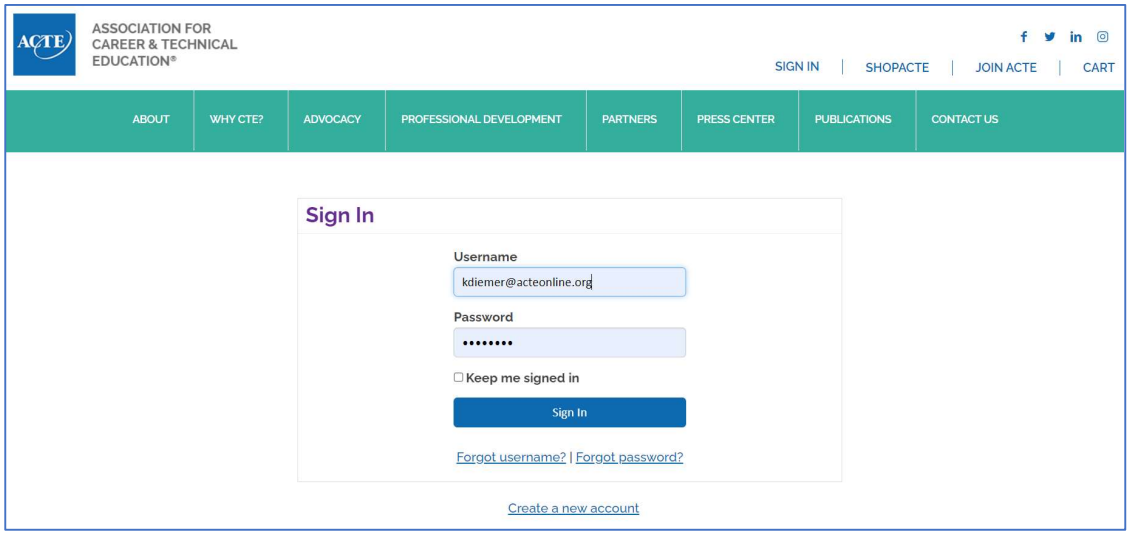
Logging into SCM

Go to: www.ACTEonline.org Log into your profile.

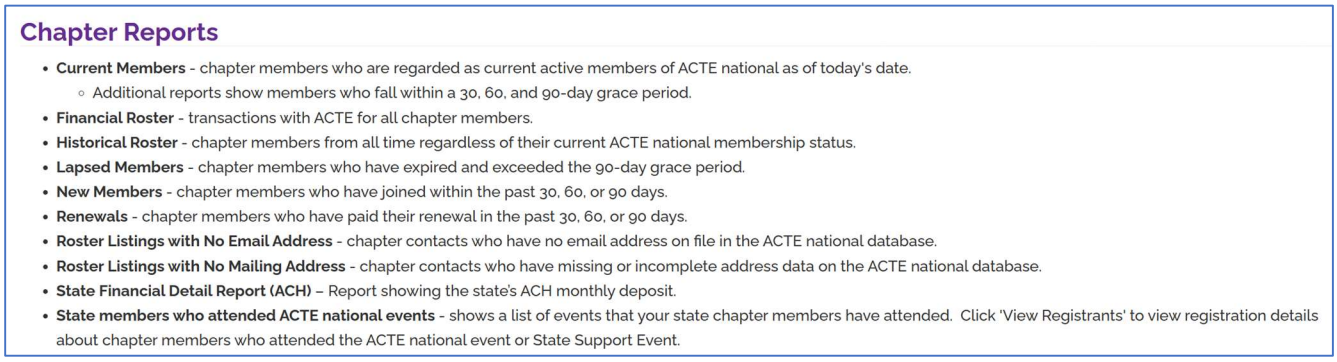


At least one State Administrator will be granted access to the State Chapter Module. This must be set up prior to gaining access to the state's membership information. Contact Kelli Diemer for information.

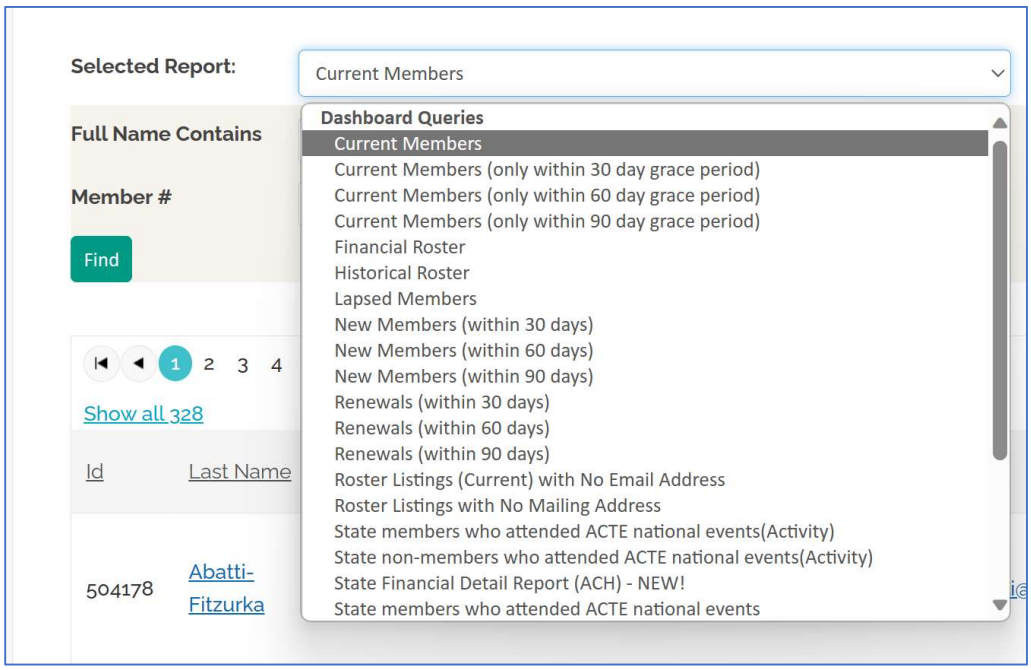
Open a second tab and go to https://web.acteonline.org/scm

State Chapter Module Main Screen

The descriptions of available Chapter Reports are listed on the main screen.

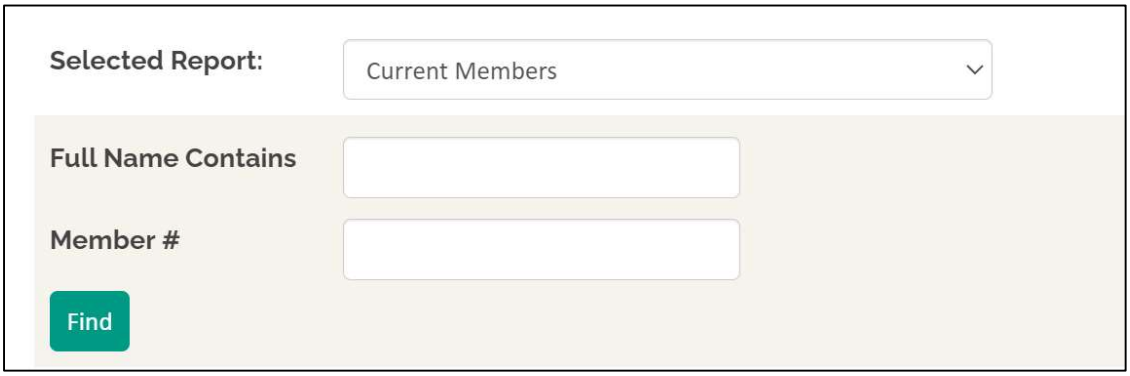


To open a report, choose from the dropdown menu for the Selected Report.

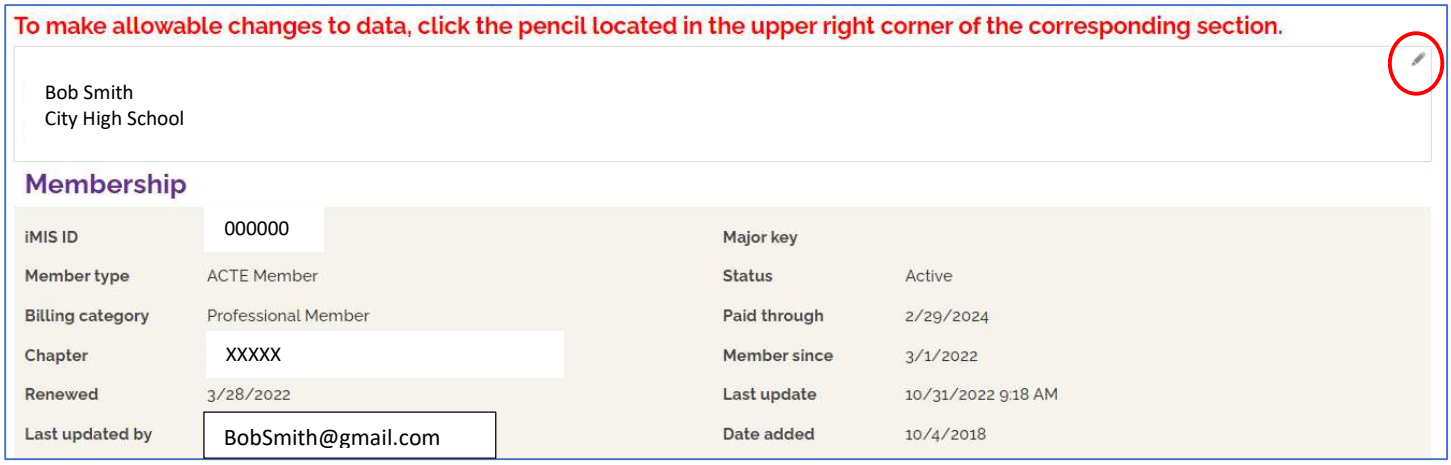


Searching for Individual Records

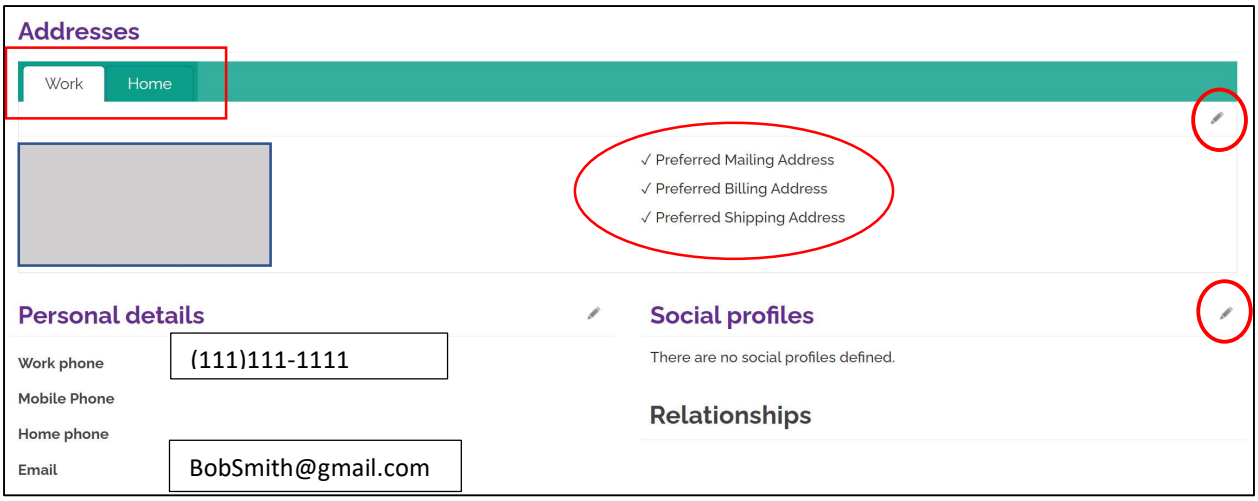
You can also search for an individual by name or member number. You can also search for individuals by part of their name (i.e. Miller or George). This brings up individual members matching your criteria.



To get more detail on an individual, choose their name. To edit parts of the individual's profile, choose the **pencil** in the appropriate section.

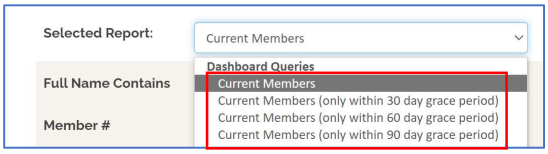


Notice the preferred mailing, billing, and shipping is marked as either Main/Home or Work. *If the address is missing on the preferred mailing, billing or shipping address, the member will not be receiving mailed correspondence from ACTE*.



State Chapter Module Reports

Current Member Reports



1. Current Members Report (includes the 90-day grace period)

The Current Members report gives you a list of all current members including those in the 90-day grace period. You can quickly see several columns of information (you may need to slide screen). By clicking on the column heading, the data sorts by the column information. The Current Members report can be exported as Excel, CSV, pdf, etc.

2. Current Members (only within 30-day grace period)

The Current Members (only within 30-day grace period) does not list all members but only those in the 30-day grace period (expired within 1-30 days).

3. Current Members (only within 60-day grace period)

The Current Members (only within 60-day grace period) does not list all members but shows those in the 60-day grace period (expired within 1-60 days).

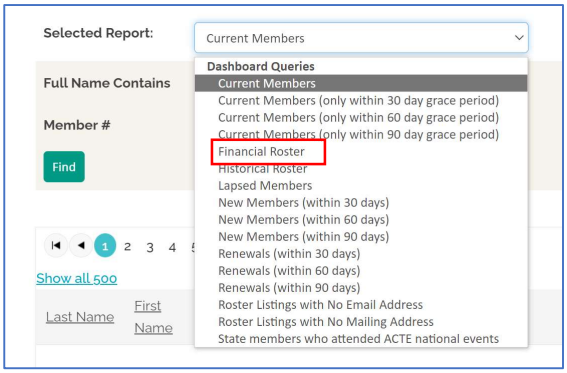
4. Current Members (only within 90-day grace period)

The Current Members (only within 90-day grace period) does not list all members but shows those in the 90-day grace period (expired with 1-90 days).

State Financials

The Financial Roster is listed on the drop-down menu and shows financial transactions with dates.

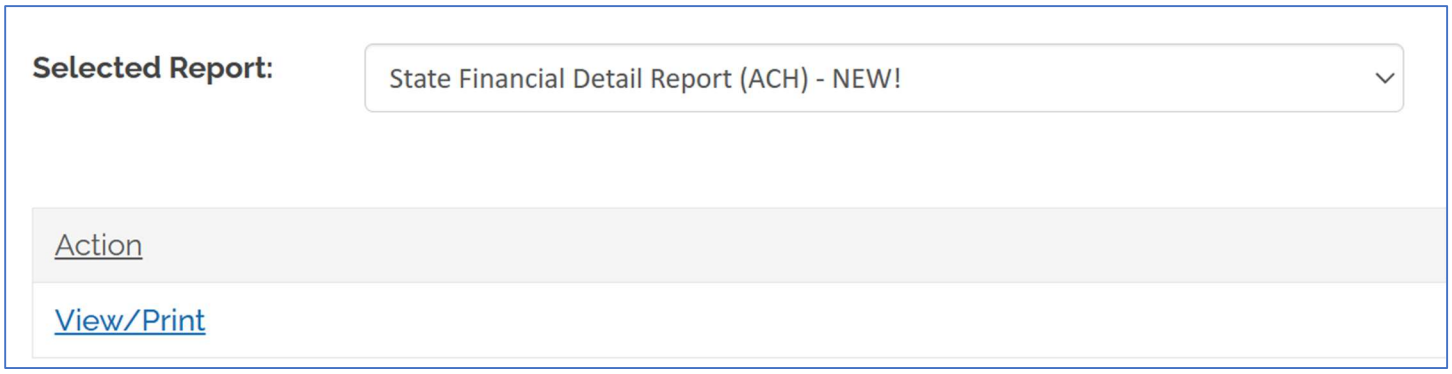
1. Financial Roster



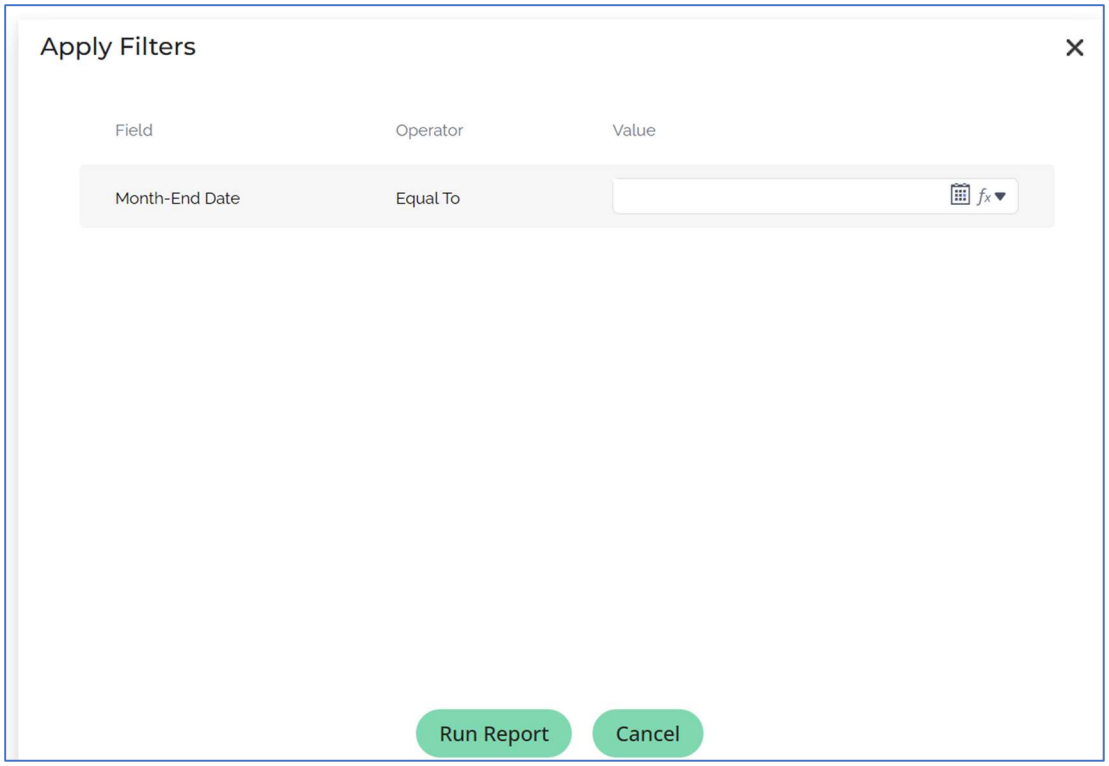
The Financial Roster report gives you the option of searching for transactions between dates or for a member (by membership number). The Financial Roster report shows ALL transactions from a member including those to ACTE.

St Id	First Name	Last Name	Title	School/Bus	Email	Description	Transaction Date	Amount Pa	Paid Thru
526412						ACTE Membership Dues	10/23/2023	$80.00	1/31/2025
526412						ACTE Postsecondary Adult and Career Education	10/23/2023	$0.00	1/31/2025
526412						CA-California Assn for Career & Technical Education	10/23/2023	$29.00	1/31/2025
526412						Freight	10/20/2023	$144.90	

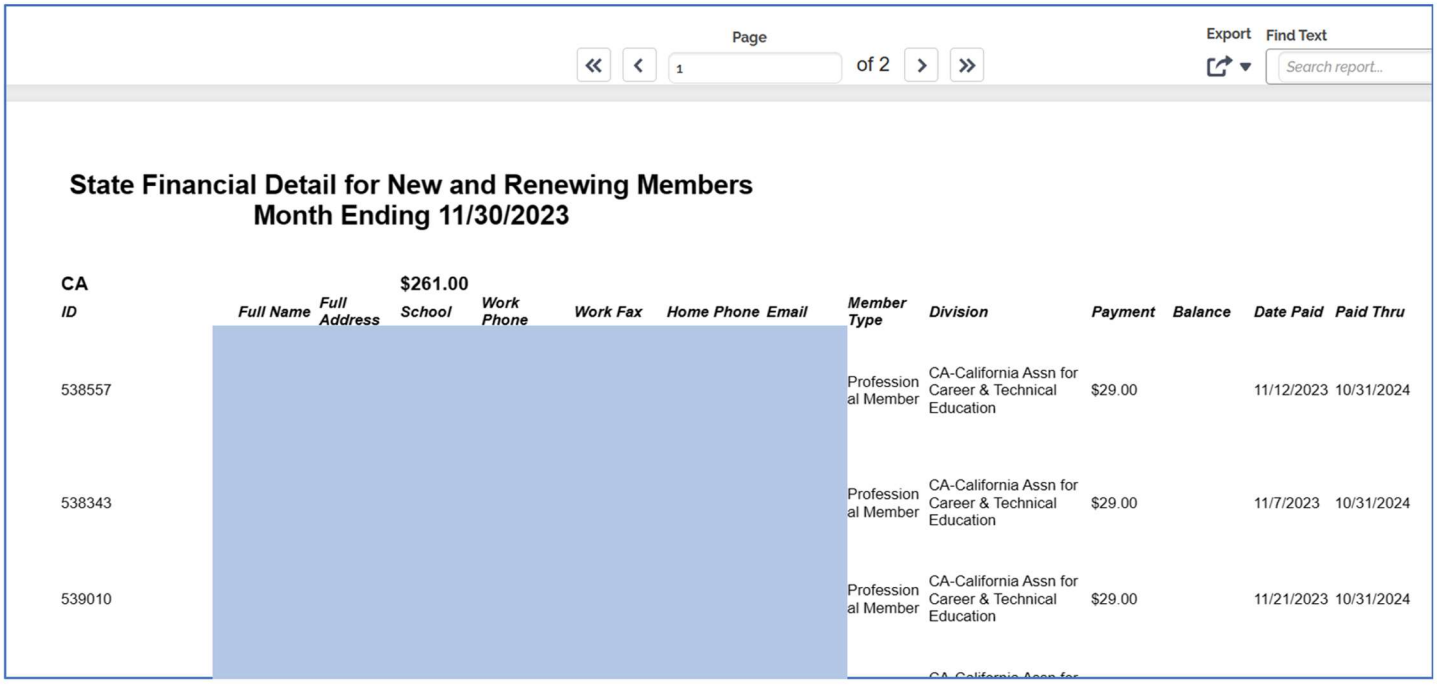
2. The State Financial Detail Report
   This report shows the transactions that make up the ACH deposit.



Put in the appropriate end of month date to run the State Financial Detail Report (ACH) – NEW! and select Run Report.

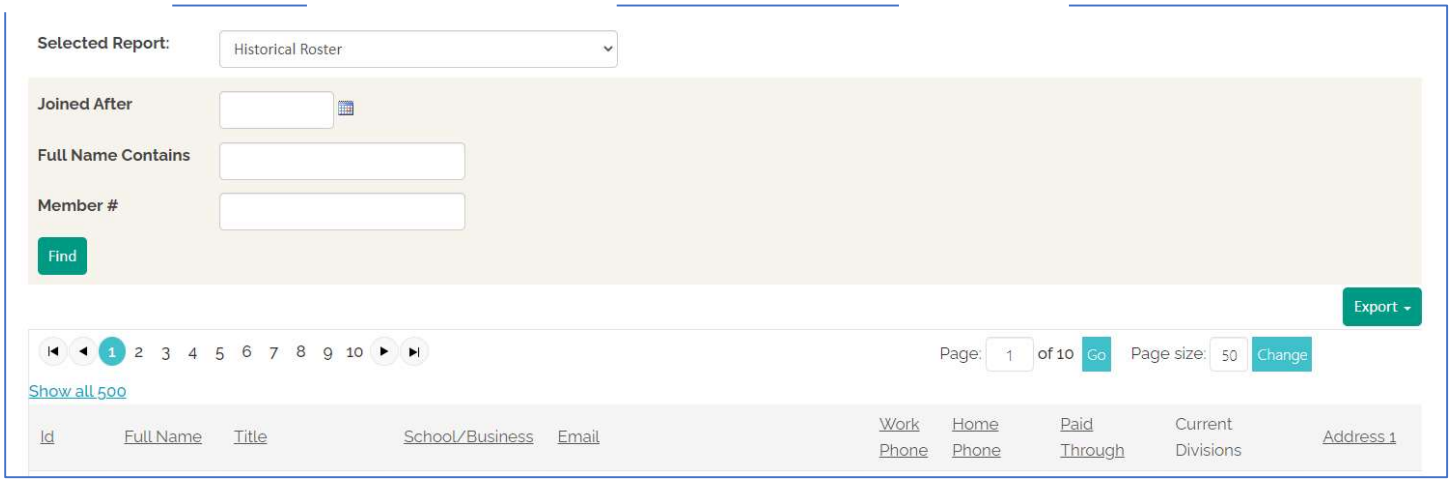


The report runs as a pdf but can be exported in a spreadsheet format is needed. This report shows only the amounts paid to the state association and will match the ACH monthly deposit.



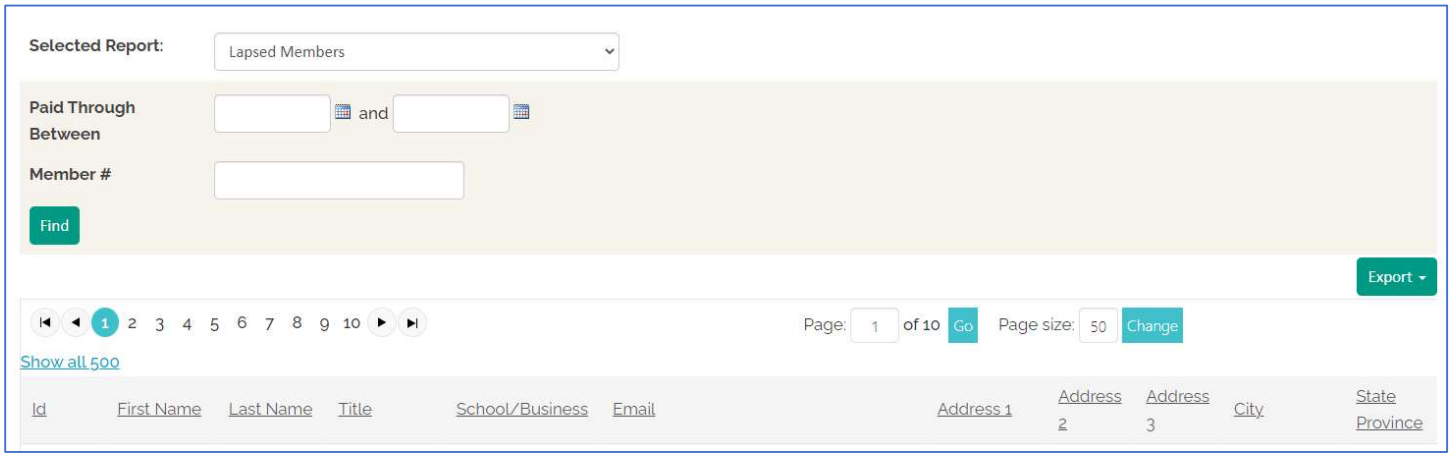
Historical Roster

Records can be searched by date, name, or member number. If more than one record comes up from search, data can be sorted by clicking on the column title.

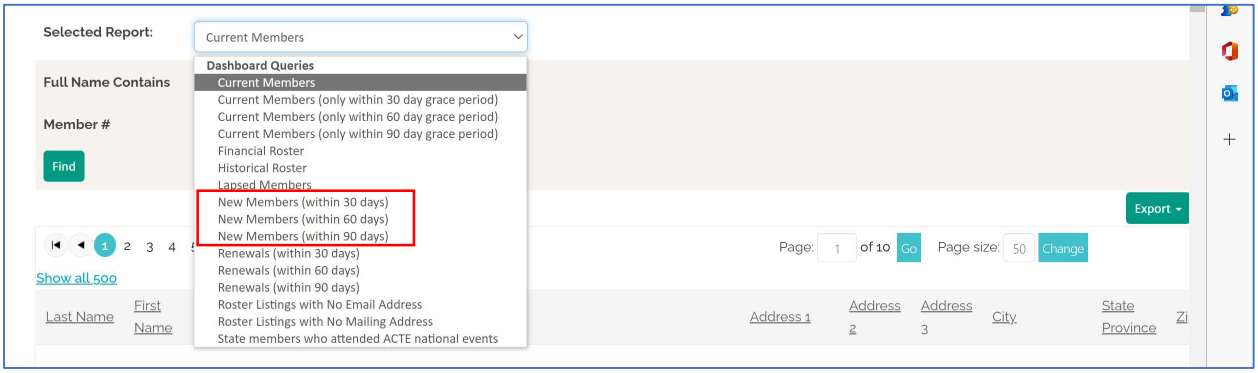


Lapsed Members

Anyone in our database that has expired past the 90 grace period window will appear on this list. Search for records by dates or member number. If more than one record comes up from search, data can be sorted by clicking on the column title.



New Member Reports



1. New Members (within 30 days)

The New Members report gives you a list of all new members who have joined in the last 30 days. You can quickly see several columns of information (you may need to use the slide bar at the bottom of the window). By clicking on the column heading, the data sorts by the column information.

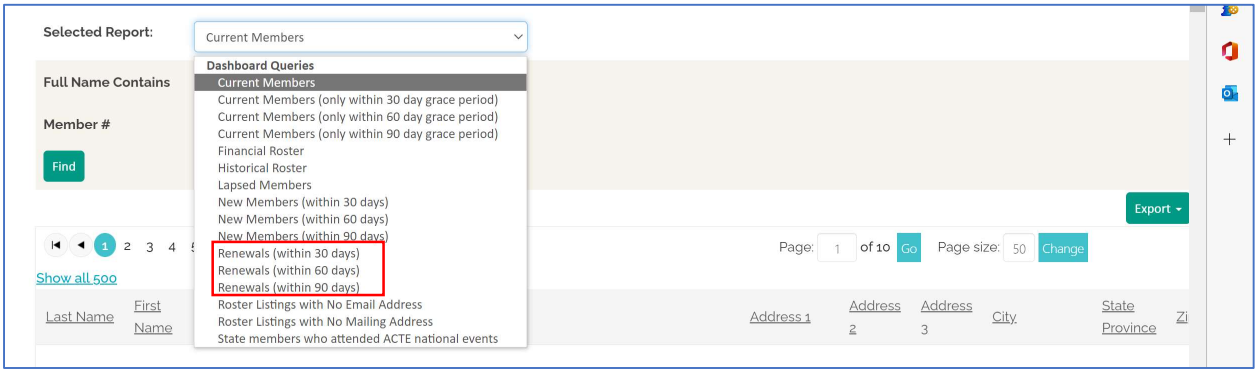
2. New Members (within 60 days)

The New Members report gives you a list of all new members who have joined in the last 60 days. This list is inclusive and includes all new members who joined in the past 1-60 days. You can quickly see several columns of information (you may need use the slide bar at the bottom of the window). By clicking on the column heading, the data sorts by the column information.

3. New Members (within 90 days)

The New Members report gives you a list of all new members who have joined in the last 90 days. This list is inclusive and includes all new members who joined in the past 1-90 days. You can quickly see several columns of information (you may need to use the slide bar at the bottom of the window). By clicking on the column heading, the data sorts by the column information.

Renewal Reports



1. Renewals (within 30 days)

This Renewals report gives a list of **all** entries that have a transaction date within the past **30** days.

Transaction Date	Transaction Type	Join Date	Paid Through
8/8/2022	DIST	8/1/2016 0:00	7/31/2022
7/20/2022	DIST	7/1/2022 0:00	6/30/2023
8/4/2022	DIST	7/1/2017 0:00	6/30/2023
7/27/2022	DIST	7/1/2022 0:00	6/30/2023
7/25/2022	DIST	9/1/2008 0:00	9/30/2023
7/25/2022	DIST	7/1/2022 0:00	6/30/2023
8/2/2022	DIST	9/1/2016 0:00	8/31/2023
7/12/2022	DIST	7/1/2017 0:00	6/30/2023
7/25/2022	DIST	7/1/2022 0:00	6/30/2023

2. Renewals (within 60 days)

This Renewals report gives a list of **all** entries that have a transaction date within the past **60** days.

Transaction Date	Transaction Type	Join Date	Paid Through
8/8/2022	DIST	8/1/2016 0:00	7/31/2022
6/27/2022	DIST	3/1/2017 0:00	5/31/2023
6/23/2022	DIST	8/1/2016 0:00	5/31/2023
8/4/2022	DIST	7/1/2017 0:00	6/30/2023
7/25/2022	DIST	9/1/2008 0:00	9/30/2023
8/2/2022	DIST	9/1/2016 0:00	8/31/2023
7/5/2022	DIST	8/1/2016 0:00	7/31/2023
6/29/2022	DIST	12/3/2020 0:00	5/31/2023
7/12/2022	DIST	7/1/2017 0:00	6/30/2023
6/23/2022	DIST	6/1/2022 0:00	5/31/2023

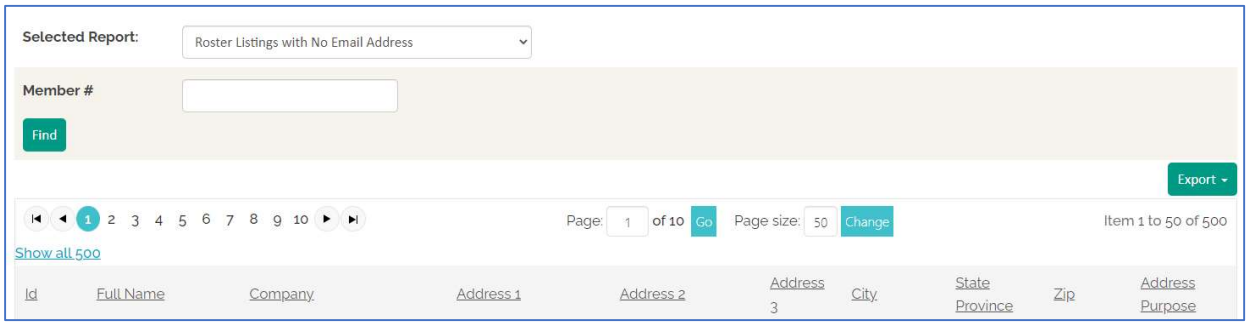
3. Renewals (within 90 days)

This Renewals report gives a list of **all** entries that have a transaction date within the past **90** days.

Transaction Date	Transaction Type	Join Date	Paid Through
5/11/2022	DIST	4/1/2021 0:00	3/31/2023
8/8/2022	DIST	8/1/2016 0:00	7/31/2022
6/27/2022	DIST	3/1/2017 0:00	5/31/2023
6/23/2022	DIST	8/1/2016 0:00	5/31/2023
8/4/2022	DIST	7/1/2017 0:00	6/30/2023
7/25/2022	DIST	9/1/2008 0:00	9/30/2023
8/2/2022	DIST	9/1/2016 0:00	8/31/2023
5/28/2022	DIST	7/1/2016 0:00	6/30/2023
5/27/2022	DIST	5/1/2021 0:00	4/30/2023
5/30/2022	DIST	2/9/2021 0:00	5/31/2023
7/5/2022	DIST	8/1/2016 0:00	7/31/2023
6/29/2022	DIST	12/3/2020 0:00	5/31/2023
5/16/2022	DIST	6/1/2020 0:00	5/31/2023
7/12/2022	DIST	7/1/2017 0:00	6/30/2023

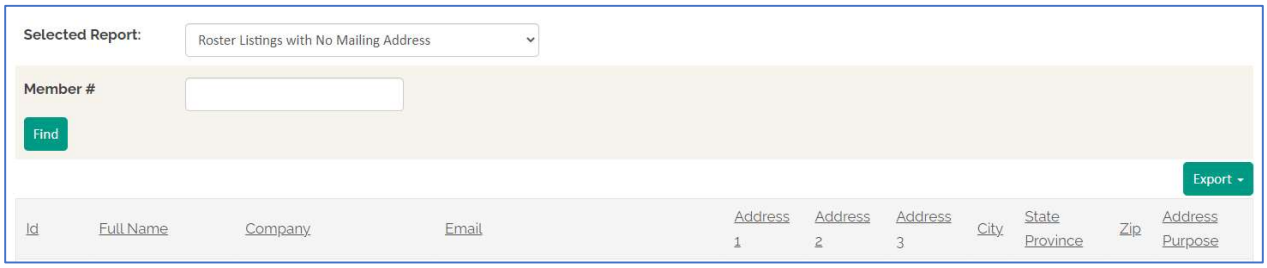
Missing Member Information Reports

1. Roster Listing with No Email Address



This report shows a list of members who have no email address in their member profile. You are also able to search by member number to find one individual record. To sort multiple records from search, click on the column heading.

2. Roster Listing with No Mailing Address



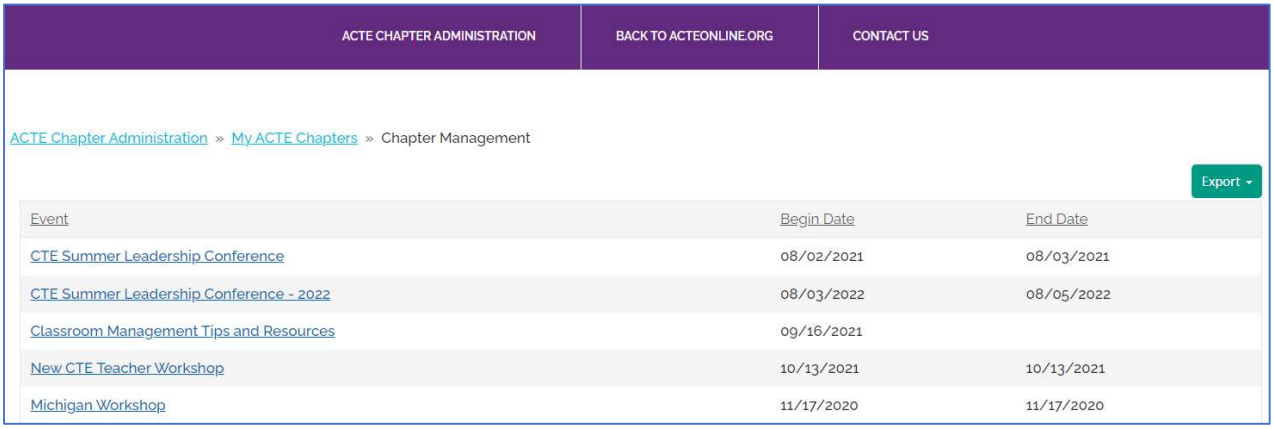
This report shows a list of members who have no mailing address in their member profile. You are also able to search by member number to find one individual record. To sort multiple records from search, click on the column heading.

Member Event Activity Reports

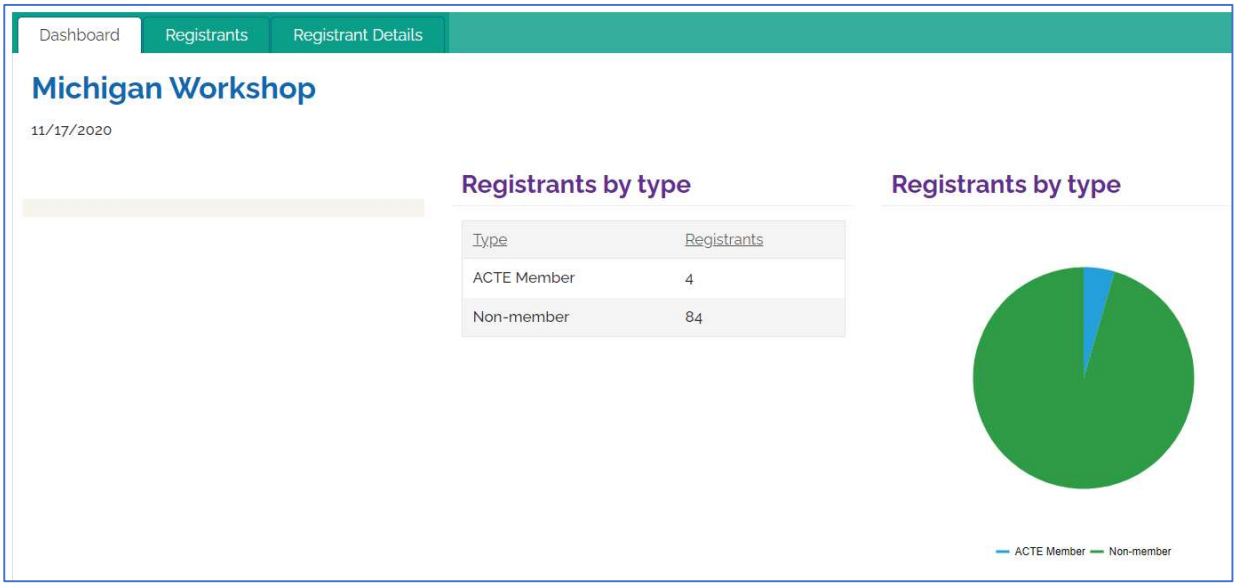
Chapter-Sponsored Event Dashboards

Chapter-Sponsored Event Dashboards

In some instances, ACTE manages registration for a state event. In those cases a dashboard with event information is created and accessible through the SCM.



The Dashboard Tab gives you a breakdown of registration types.

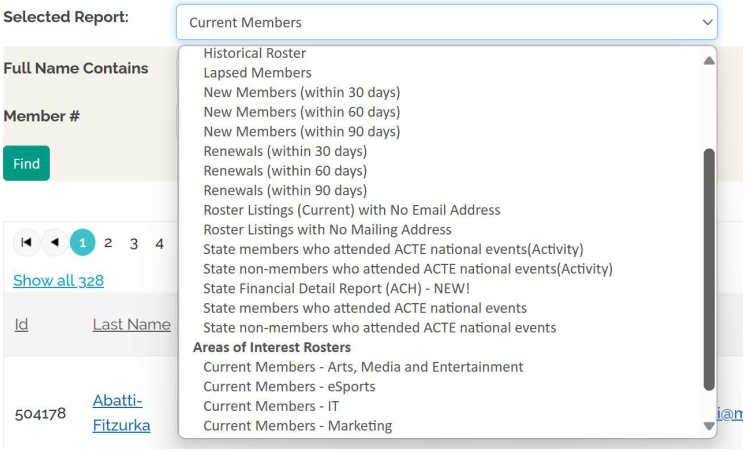


The Registrants Tab lists all who registered for the event which includes members and nonmembers.

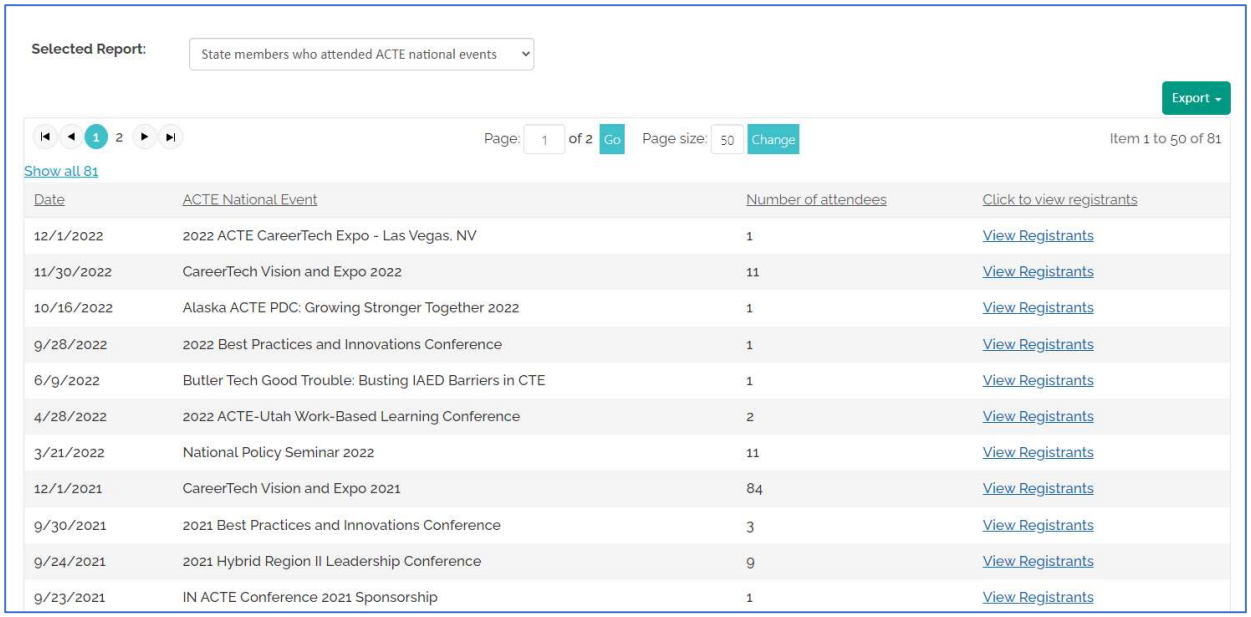
State Members Who Attended ACTE National Events

For ACTE National Events prior to CareerTech VISION 2023, this information is available in the reports **State members who attended CTE national events** & **State non-members who attended ACTE national events**.

For ACTE National Events (CareerTech VISION 2023 to current), this information is available in the reports **State members who attended ACTE national events** (Activity) & **State non-members who attended ACTE national events (Activity)**.



The final report on the drop-down menu is the ACTE National Event registrants from your state.



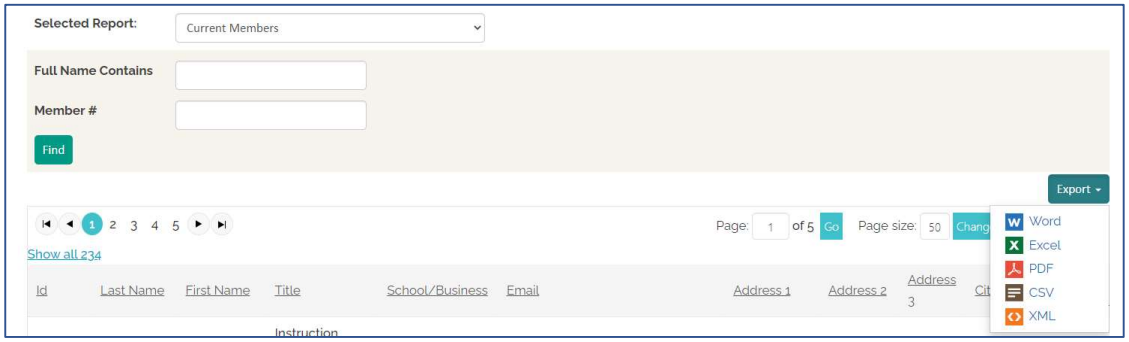
Date	ACTE National Event	Number of attendees	Click to view registrants
12/1/2022	2022 ACTE CareerTech Expo - Las Vegas, NV	1	View Registrants
11/30/2022	CareerTech Vision and Expo 2022	11	View Registrants
10/16/2022	Alaska ACTE PDC: Growing Stronger Together 2022	1	View Registrants
9/28/2022	2022 Best Practices and Innovations Conference	1	View Registrants
6/9/2022	Butler Tech Good Trouble: Busting IAED Barriers in CTE	1	View Registrants
4/28/2022	2022 ACTE-Utah Work-Based Learning Conference	2	View Registrants
3/21/2022	National Policy Seminar 2022	11	View Registrants
12/1/2021	CareerTech Vision and Expo 2021	84	View Registrants
9/30/2021	2021 Best Practices and Innovations Conference	3	View Registrants
9/24/2021	2021 Hybrid Region II Leadership Conference	9	View Registrants
9/23/2021	IN ACTE Conference 2021 Sponsorship	1	View Registrants

To see list of registrants, choose View Registrants.

This gives you a report of everyone from your state who has registered for the national event including the amount paid, date paid, and all individual details.

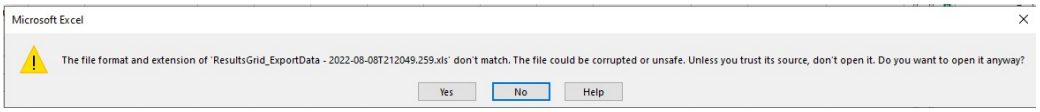
Export options

When you have run a report, you can export the information as Word, Excel, PDF, CSV, or XML.

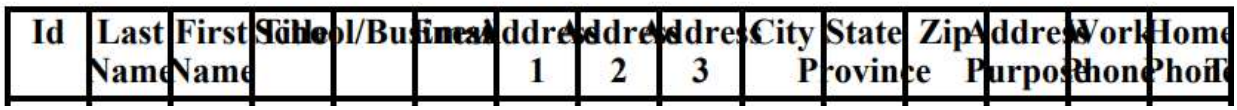


The **Word export** –

The **Excel export** brings up a warning message.



The **PDF export** gives you a non-editable document.

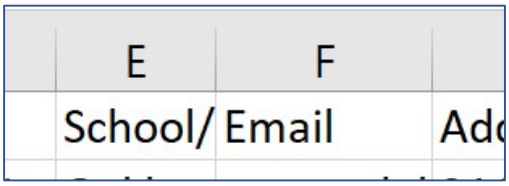


The **CSV export** is the recommended option for exporting reports.

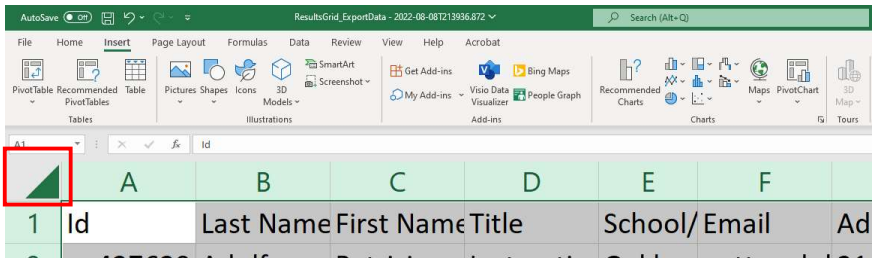
The **XML export** brings up an error.

Spreadsheet Filters, Text Filters, and Sort Functions

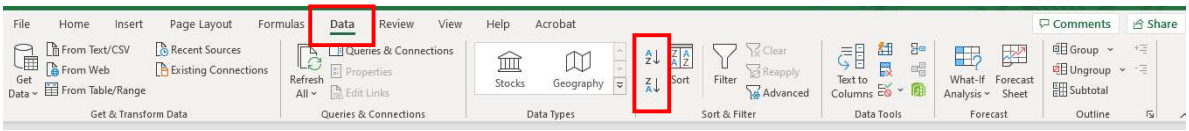
To widen a column in a CSV export, double click on the line between the columns (E and F).



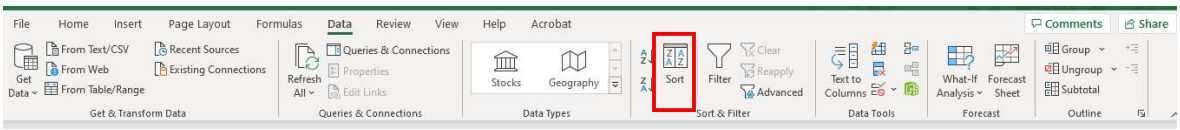
By clicking on the top left space, you can quickly highlight the entire spreadsheet. This enables you to choose Filter for all columns and rows of the spreadsheet.

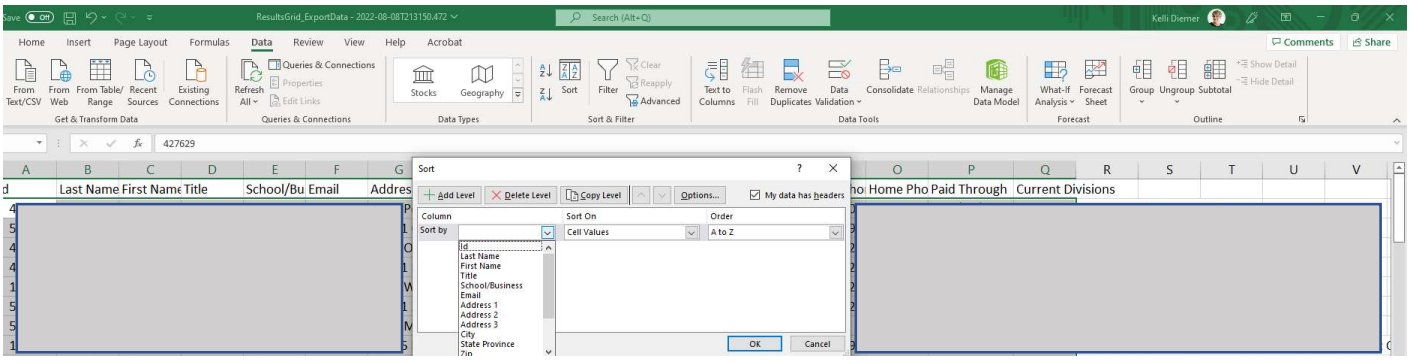


The Sort function can be used by choosing the column title you want to sort by and then choose ascending or descending.

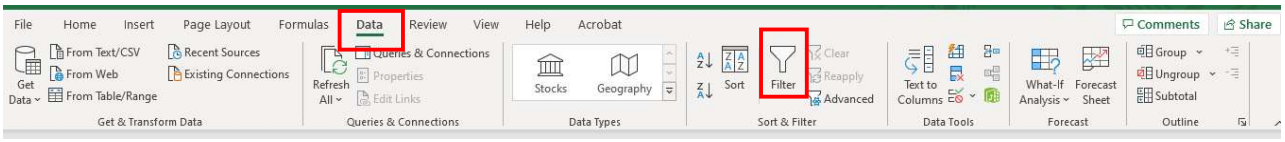


To sort by multiple columns, choose the sort option.

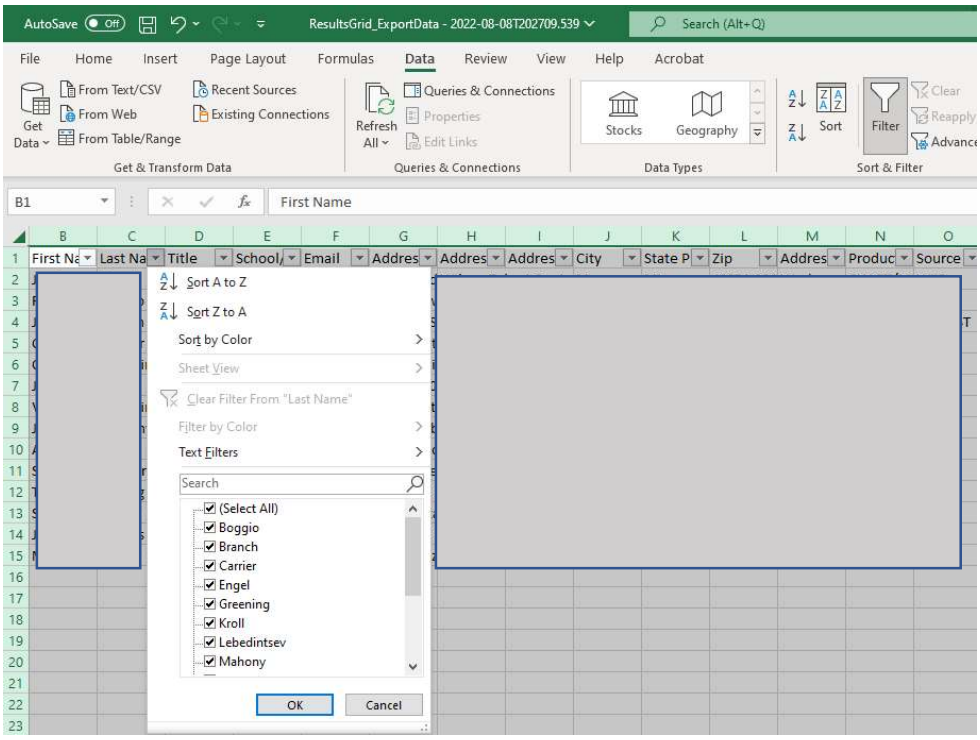




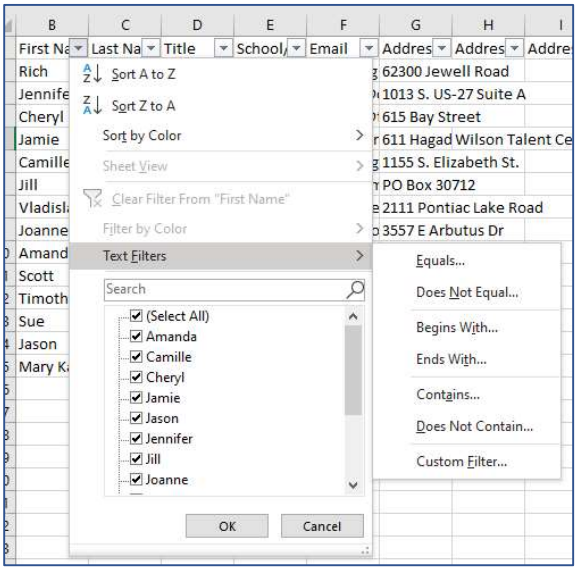
Filter function is under the dropdown Data menu.



When the Filter function is on, the **Sort option** is listed in the Filter drop down menu.

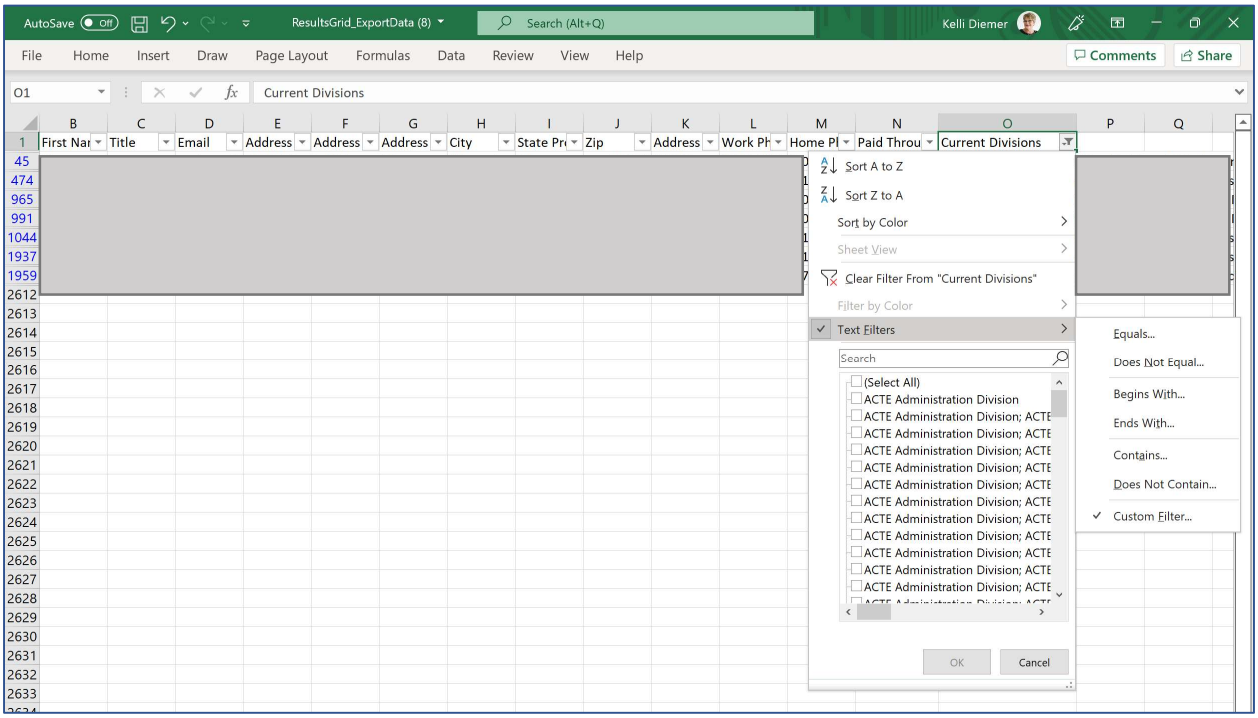


Text filter is an option under the filter function.

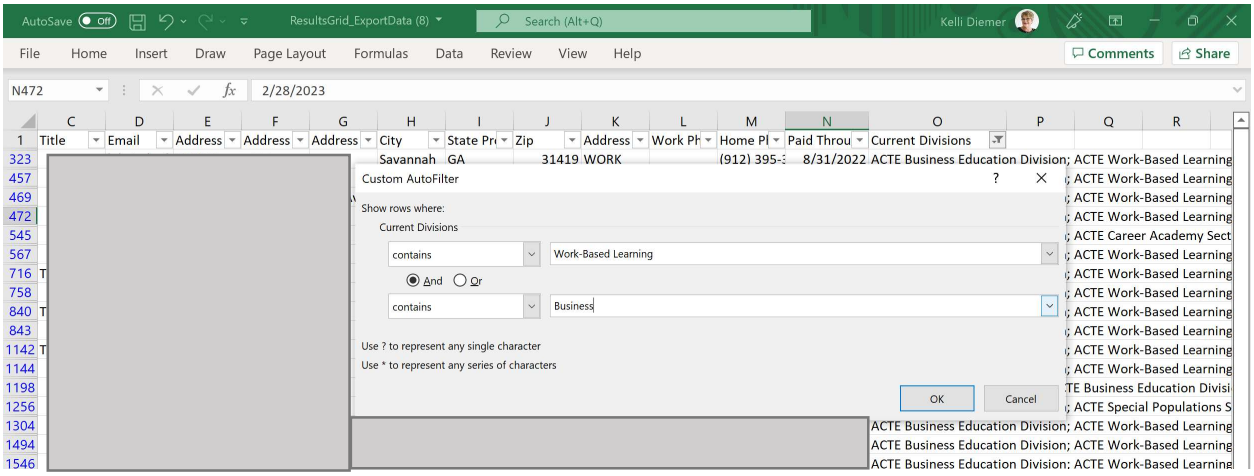


Division Report

To create a report with certain Divisions, export the total roster to Excel or CSV. Open filter on your report and choose **text filter** on Current Divisions field.



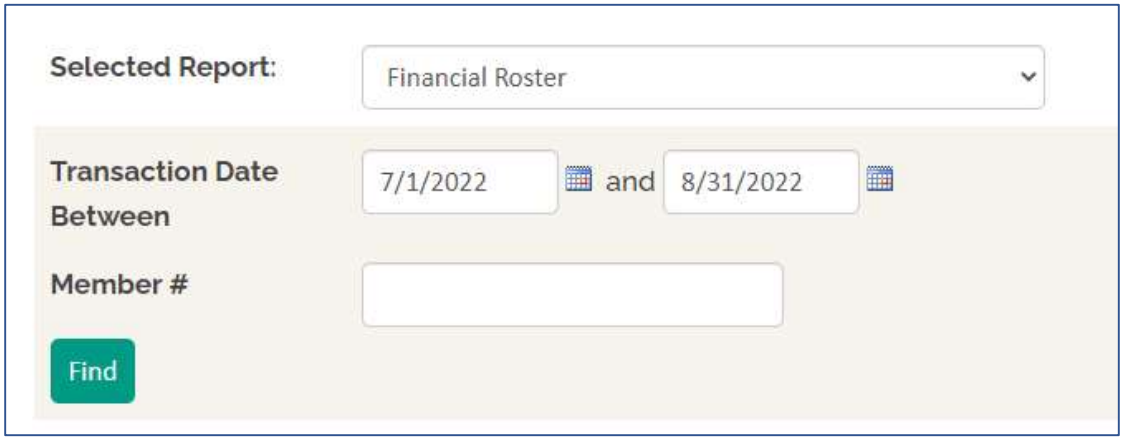
To find members in the Business Division that are also in Work-Based Learning, use the options under Text Filter (And, Or, Contains, Does not Contain, etc.) to pull your specific list of members in ACTE Divisions/Sections column.



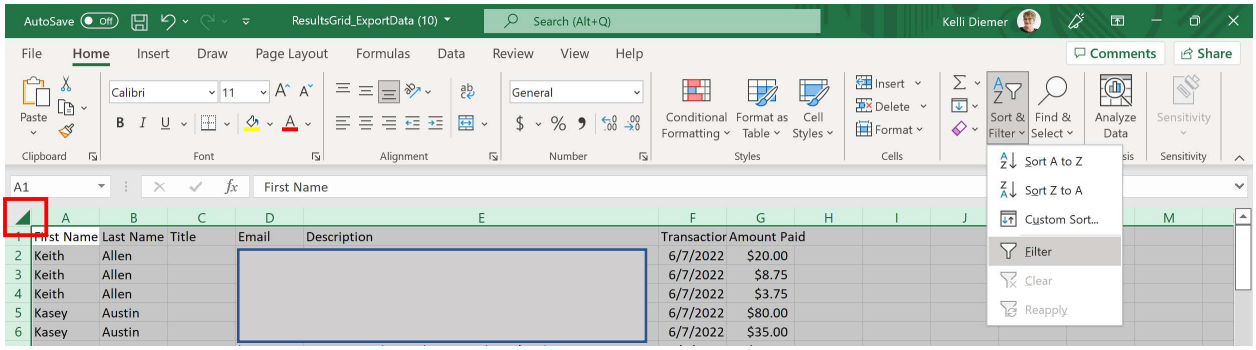
Spreadsheet Grouping, Subtotals, and Grand Totals

Financial Roster Reports

This will run a report for all transactions run between dates.

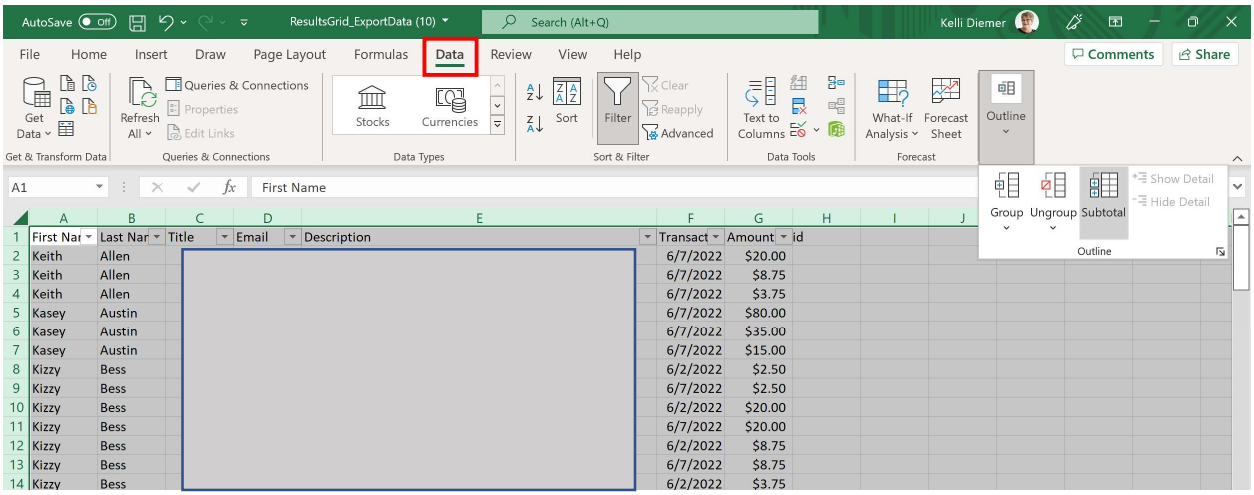


Choose the select all to highlight all rows and columns. Turn on the filter for the report.

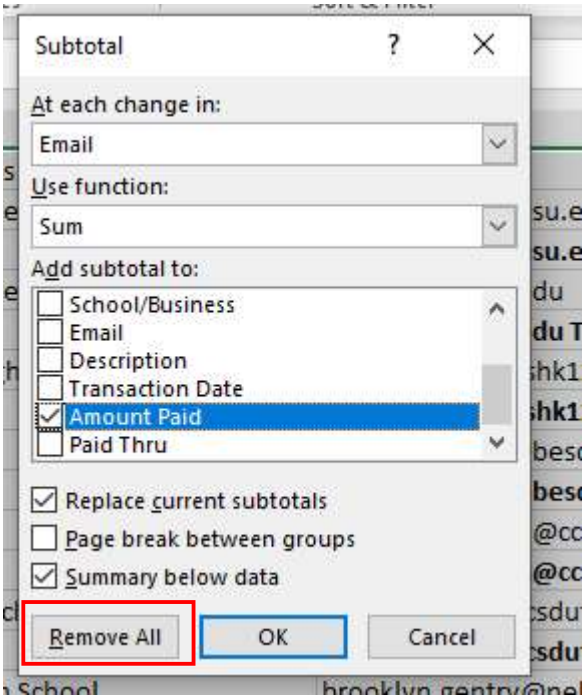


At this point, it is important to sort your data by the appropriate field (usually the email field to keep individual's records together).

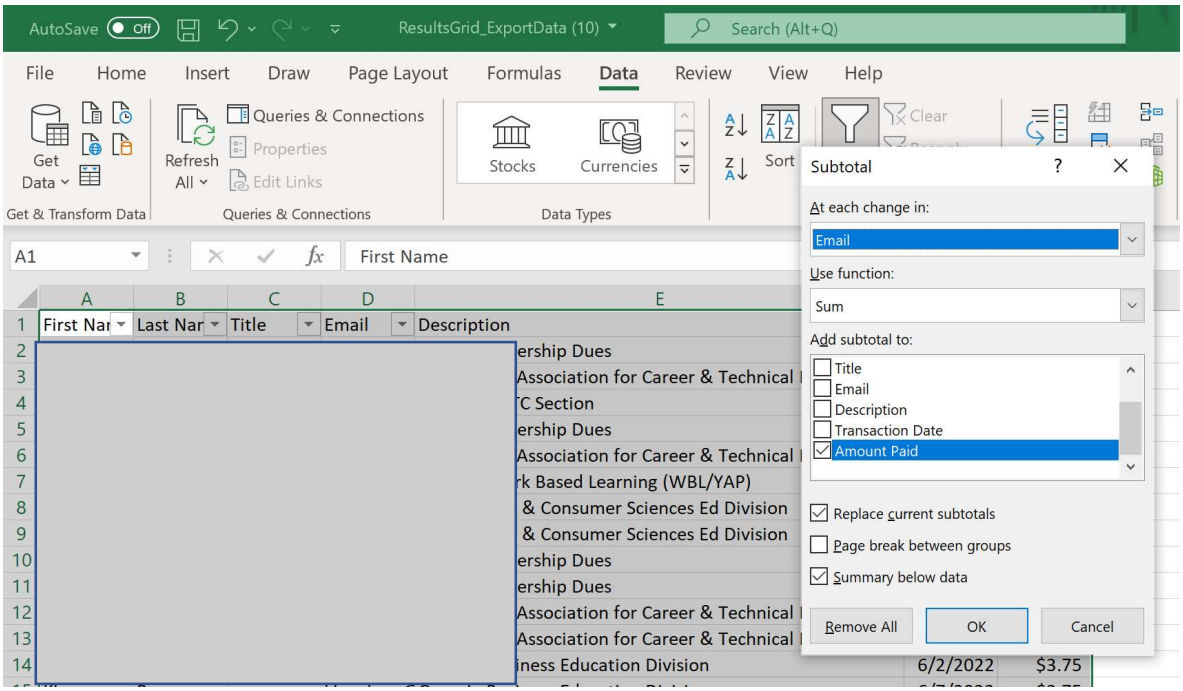
From the Data menu, choose outline and then subtotal.



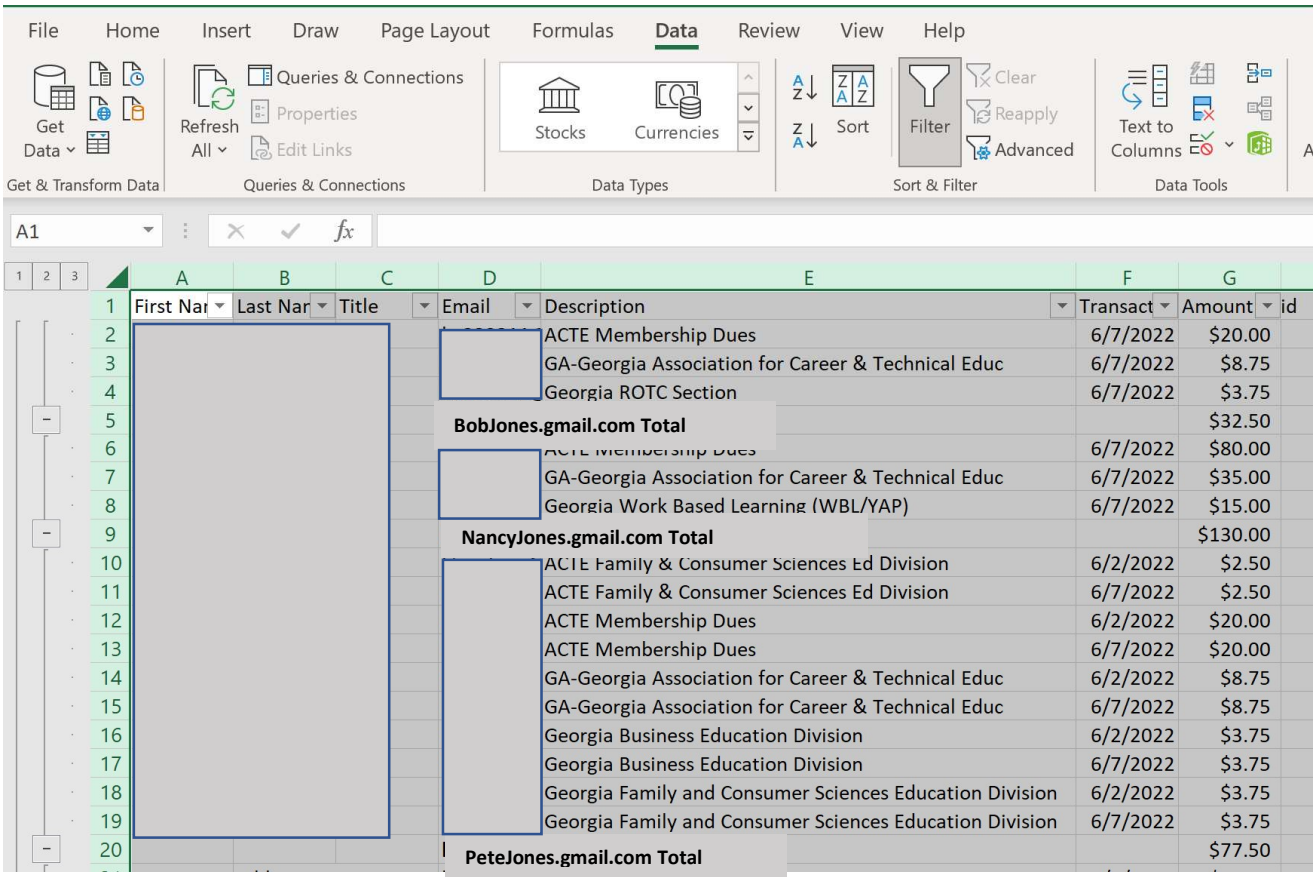
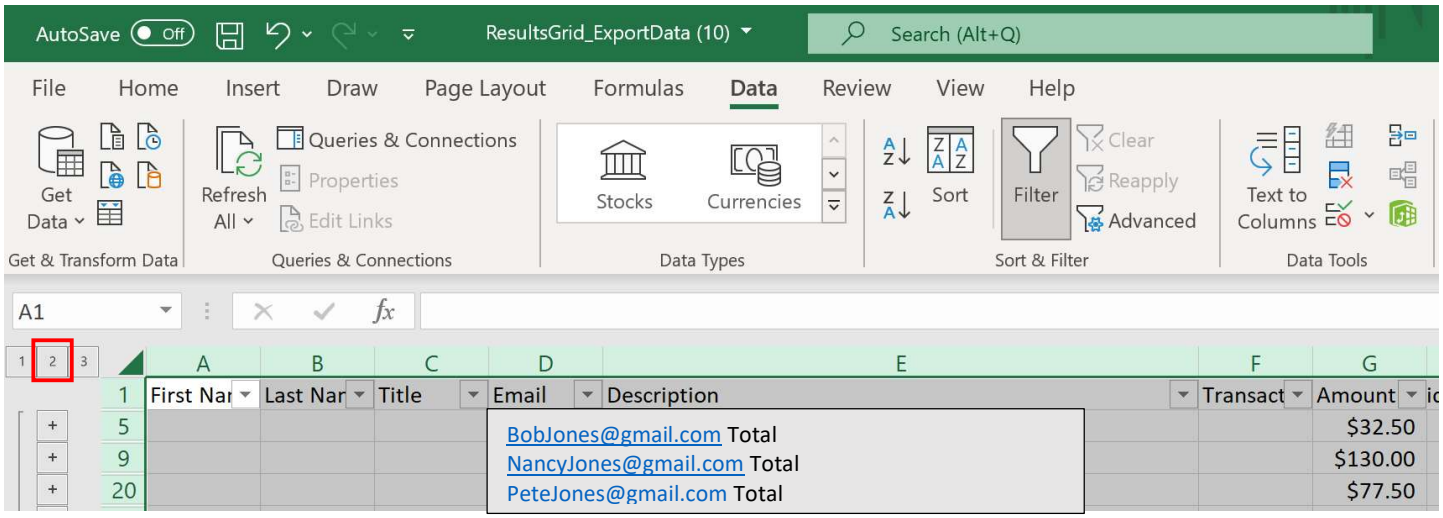
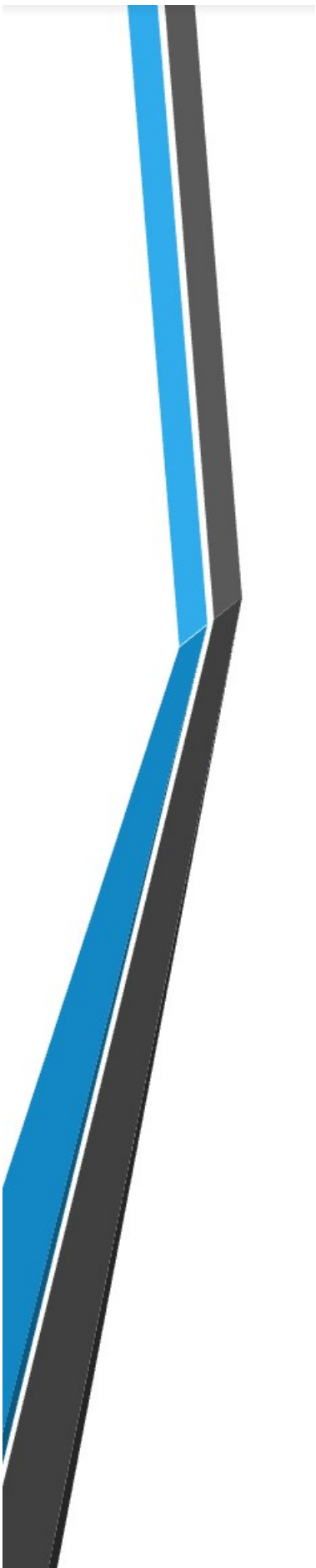
If you didn't sort before running subtotals, you are able to remove this calculation and redo after sorting by choosing Remove All button.



To find totals by individual, choose the following within the Subtotal menu.



This will give you subtotals by individual -



Choosing the #2 in the upper left corner will collapse the details and give you the amount that was paid by each individual.