



- To view Officers in different School Years click the "Down Arrow" next to the School Year and select the year you wish to view ("Show All" will list all Officers listed for each school year on the same screen):

Officer/Board Member Contact

Working with: CSM Test Unit #3

School Year: 2013 - 2014 ▼ 


Copy Selected to: 



Position	Name	E-Mail	Phone #	Cell #
Treasurer	Bonzo, Ed	ptaez@csmcntral.com		
President	Douglas, Colleen	cdouglas@csmcntral.c...		

- To copy a current School Year Officer to another year, highlight the Officer you wish you copy and select the year you wish to copy them to from the drop down. Once you select the year, hit the 'Green Arrow" button to copy.

Officer/Board Member Contact

Working with: CSM Test Unit #3

School Year: 2013 - 2014 ▼ 

Copy Selected to: ▼  

Position	Title	Name	E-Mail	Phone
Treasurer	Treasurer	Bonzo, Ed	ptaez@csmcntral.com	
President	President	Douglas, Colleen	cdouglas@csmcntral.c...	

 **Copy Successful**

The selected officer(s) were copied successfully.

Adding New Officers:

1. Select the School Year
2. Select the "Add" button

Position	Title	Name	E-Mail	Phone #	Cell #
Treasurer	Treasurer	Bonzo, Ed	ptaez@csmcntral.com		

Choose one of the preloaded Positions of the Officer you are adding from the drop down menu. **Note: You can only have one President and one Treasurer listed for each School Year. The list of available positions is fixed by CAPTA. If you need to add a Board Member with a Position that is not listed, select "Other" and Type their Position into the Title box.*

Add New Officer

Position: Advisor/Mentor/Liaison

Name: Advisor/Mentor/Liaison

Title: Advocacy/Legislation

Arts

Auditor

Awards/Scholarships/Grants

3. Enter the Officer's name **Note for units using the full version of PTAEZ: All individuals listed in your Admin/Individuals will populate a drop down for you to choose from.*

Add New Officer

Position: Advisor/Mentor/Liaison

Name: Baldwin, Sam

Title:

Buttons: Cancel

- For individuals not already listed or for units that do not have the full version of PTAEZ, you will be prompted to add the new individual. Enter in any/all contact information for that Officer and select the "Add" button.

Add New Name

Left Tab: Name Info

Full Name: Jane Smith

First Name: Jane

Middle Name:

Last Name: Smith

Buttons: Next Cancel

Right Tab: Address Info

Email: janesmith@email.com

Address: 1234 THIS ST

City: City

State: CA Zip Code: 95687

Phone: (877) 944-7798

Cell:

Buttons: Back Add Cancel

- Enter The Title of the Officer. *Note: This field is free form and can be custom to your unit.

Add New Officer

Position: Advisor/Mentor/Liaison

Name: Baldwin, Sam

Title: Student Advisor

Buttons: Save Cancel

- Select the "Save" button to finish adding the new Officer.



Add New Officer

Position:

Name:

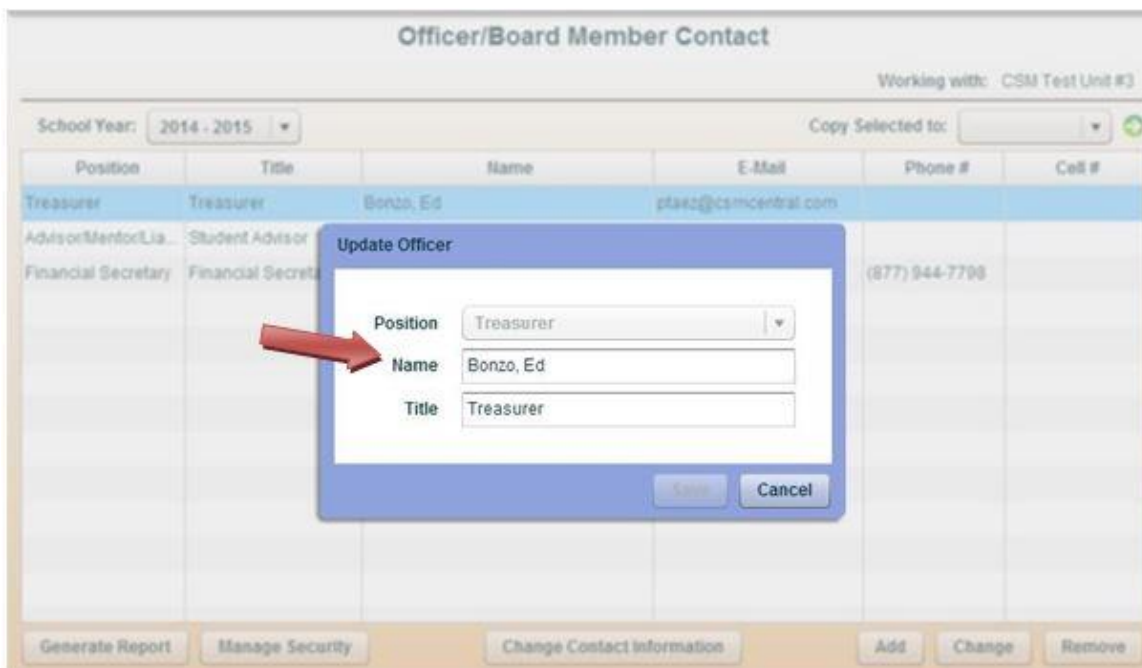
Title:



Change an Officer:

Certain "Positions" once they have been added (i.e. President/Treasurer) you cannot add a second Officer with the Same "Position". If an incorrect individual was assigned to a "Position", you will need to change the "Name" of the person:

1. Select the Officer you wish to change
2. Change the "Name" to the correct Officer
3. Change the "Title" if necessary
4. Select the "Save" button



Officer/Board Member Contact

Working with: CSM Test Unit #3

School Year: Copy Selected to:


Position	Title	Name	E-Mail	Phone #	Cell #
Treasurer	Treasurer	Bonzo, Ed	ptaxcz@csimcentral.com		
Advisor/Mentor/Lia...	Student Advisor				
Financial Secretary	Financial Secreta			(877) 944-7708	

Update Officer

Position:

Name:

Title:



Generate Report Manage Security Change Contact Information Add Change Remove

Remove an Officer from a School Year:

You can remove Officers that should not be listed in the School Year you are working with (Note: Removing an Officer will not completely remove the name from the system, it may be selected again for another position or for another year):

1. Select the Officer you wish to remove
2. Select the "Remove:" button


Officer/Board Member Contact

Working with: CSM Test Unit #3

School Year: 2014 - 2015 Copy Selected to:

Position	Title	Name	E-Mail	Phone #	Cell #
Treasurer	Treasurer	Douglas, Colleen	cdouglas@csmcntral.c...		
Advisor/Mentor/Lia...	Student Advisor	Baldwin, Sam	sbaldwin@csm.com		
Financial Secretary	Financial Secretary	Smith, Jane	janesmith@email.com	(877) 944-7798	

Generate Report
Manage Security
Change Contact Information
Add
Change
Remove



3. Select the "Yes" button to complete the removal.

 **Are you sure**

Are you sure you want to remove Baldwin, Sam from the officers?

Yes
No
Cancel

Change Contact Information for an Officer:

1. Select the Officer you wish to change the contact information
2. Select the "Change Contact Information" button


Officer/Board Member Contact

Working with: CSM Test Unit #3

School Year: 2014 - 2015 Copy Selected to:

Position	Title	Name	E-Mail	Phone #	Cell #
Treasurer	Treasurer	Douglas, Colleen	cdouglas@csmcntral.c...		
Financial Secretary	Financial Secretary	Smith, Jane	janesmith@email.com	(877) 944-7798	

Generate Report
Manage Security
Change Contact Information
Add
Change
Remove



3. Change desired information
4. Select the "Ok" button

The image shows two screenshots of a web application dialog box titled "Change Officer Contact Information". The left screenshot shows the "Name Info" tab with fields for First Name (Jane), Middle Name, and Last Name (Smith). The right screenshot shows the "Address Info" tab with fields for EMail (janesmith@email.com), Address (1234 This St), City, State (CA), Zip Code (95687), Phone ((877) 944-7798), and Cell. A red arrow points to the "Ok" button in the right screenshot.

Giving Officer access to the account:

You can give any number of Officers access to your PTAEZ/Officer Contact account:

1. Select the Officer you wish to give access to
2. Select the "Manage Security" Button

The image shows a screenshot of the "Officer/Board Member Contact" interface. At the top, it says "Working with: CSM Test Unit #3". Below that, there is a "School Year" dropdown menu set to "2014 - 2015" and a "Copy Selected to:" dropdown menu. The main part of the interface is a table with the following columns: Position, Title, Name, E-Mail, Phone #, and Cell #. The table contains two rows: Treasurer (Douglas, Colleen) and Financial Secretary (Smith, Jane). A red arrow points to the "Manage Security" button at the bottom left.

Position	Title	Name	E-Mail	Phone #	Cell #
Treasurer	Treasurer	Douglas, Colleen	cdouglas@csmcntral.c...		
Financial Secretary	Financial Secretary	Smith, Jane	janesmith@email.com	(877) 944-7798	

3. Username will auto populate with the Officers email address
4. Assign the Officer a password
5. Assign their "Role" from the drop down menu. *Note: the "Role" determines the level of access to the account.

*For units with the full version of PTAEZ, giving access through Officer Contact will also give access to the other PTAEZ features, based on the level of access for the "Role" you assign. If the Officer already has a "Role" assigned to them through Admin/Individuals,

adding/changing their "Role" in Officer Contact will update their "Role" in Admin/Individuals (and vice versa).

**For units that do not have the full version of PTAEZ, be sure to select the appropriate "Role" that includes the "Officer Manager" behind it (i.e. Auditor/Officer Manager) to ensure access to Officer Contact (with the exception of Treasurer and President, who automatically have access).

The screenshot shows the 'Officer/Board Member Contact' application window. At the top, it says 'Working with: CSM Test Unit #3'. Below this is a 'School Year' dropdown set to '2014 - 2015' and a 'Copy Selected to:' dropdown. A table lists members with columns: Position, Title, Name, E-Mail, Phone #, and Cell #. The 'Financial Secretary' row is highlighted. A 'Manage Security' dialog box is open over the table. It has a 'Login Access' section with fields for 'Username (Email)' (janesmith@email.com), 'Password' (masked with asterisks), and a 'Role' dropdown menu. The dropdown menu is open, showing options: Auditor, Auditor/Officer Manager, Financial Secretary, Financial Secretary/Officer Manager, and Treasurer. A red arrow points to the 'Manage Security' button in the table's footer, and another red arrow points to the 'Auditor/Officer Manager' role in the dropdown.

6. Select the "OK" button

This is a close-up of the 'Manage Security' dialog box. It contains the 'Login Access' section with the following fields: 'Username (Email)' with the value 'janesmith@email.com', 'Password' with masked characters '*****', and 'Role' set to 'Auditor/Officer Manager'. At the bottom right, there are 'Ok' and 'Cancel' buttons. A red arrow points directly to the 'Ok' button.

7. Once you select the "Ok" button, you will receive a notification from the system informing you that security for that Officer has been updated. Once you receive that indication, notify the Officer that they are able to login to the account with the username and password you just assigned.



Changing an Officers Access:

Once access has been given to an Officer, you can change or remove their access:

1. Select the Officer you wish to change access for
2. Select the "Manage Security" button
3. Edit their username, password and/or Role
4. Select the "Ok" button

A screenshot of the "Manage Security" dialog box. It has a blue header bar with the title "Manage Security". Inside, there's a section titled "Login Access" with a red arrow pointing to it. Below this are three fields: "Username (Email) *" with the value "janesmith@email.com", "Password *" which is empty, and "Role" with a dropdown menu showing "Auditor/Officer Manager". At the bottom, there are three buttons: "Remove Login", "Ok", and "Cancel". A red arrow points to the "Ok" button.

Removing an Officer's Access:

1. Select the Officer you wish to remove access for
2. Select the "Manage Security" button
3. Select the "Remove Login" button

A screenshot of the "Manage Security" dialog box, identical to the one above. A red arrow points to the "Remove Login" button at the bottom left.

- Confirm that you want to remove the login for that Officer by selecting the "Yes" button. Once you select the "yes" button you will receive confirmation that the Officer has been updated

Remove Login

Are you sure you want to remove this user Login?

Security Updated

The security has been updated successfully for Smith, Jane.

Generating Officer Reports:

You can generate a Report that lists all of your Officers by selecting "Generate Report". You can select what information you would like to report on, or run a "Change Log" report. [Note: CAPTA has the ability to view all officers for Districts, Councils, and Units. Districts can see Council and Unit Officers within their District. Councils may view their Officers as well as Unit Officers under them. Units can see only their own Officers.](#)

Officer/Board Member Contact

Working with: CSM Test Unit #3

School Year: 2014 - 2015

Copy Selected to: ▼

Position	Title	Name	E-Mail	Phone #	Cell #
Treasurer	Treasurer	Douglas, Colleen	cdouglas@csmcentral.c...		
Financial Secretary	Financial Secretary	Smith, Jane	janesmith@email.com	(877) 944-7798	
President	President	Bonzo, Ed	ptaez@csmcentral.com		

Change Log Report:

A "Change Log" is a report that shows any and all changes made to the unit(s) you are reporting on.

- While on the page of the School Year you wish to report on, select the "Generate Report" button
- Select the "Change Log" button

Generate report for school year 2014 - 2015

Position filter:

Council filter:

Display info for: ☒ State ☒ Districts ☒ Councils ☒ Units

Display columns for: ☒ Position ☒ Name ☒ EMail ☒ Phone

☒ Cell ☒ Address ☒ Changes

Report Type: ☒ Full Report ☐ Changes Only

Change Log **Report** **PDF** **Cancel**

3. Select the "Build Log" button to generate a change log. Note: you will only see this box if you have never built a Change Log.

Generate report for school year 2014 - 2015

Position filter:

Council filter:

Display info for: ☒ State ☒ Districts ☒ Councils ☒ Units

Display columns for: ☒ Position ☒ Name ☒ EMail ☒ Phone

☒ Cell ☒ Address ☒ Changes

Report Type: ☒ Full Report ☐ Changes Only

Change Log **Report** **PDF** **Cancel**

Change Log

Build Log Press 'Build Log' to generate a change log.

Done

- Once you select "Build Log" a new box will appear giving you information on the date range of the Change Log

Change Log

Current log contains changes from: Start to

End

Rebuild Log to include changes made since 3/17/2014 18:12.

Build Log to include changes made after 3/19/2014 13:39.

Done

- After the a Change Log is built the first time, selecting the "Change Log" button from the Generate Report screen you display a box as indicated above.
 - Selecting "Rebuild Log" will maintain all changes since the first date of the original log period, as well as add in any new changes.
 - "Build Log" will create an entirely new log, only showing changes since the "End" date of the last log period.
- 4. Select the "Done" button
- 5. Choose the information you wish to display by checking/uncheck the boxes
- 6. To run a report for just changes, select "Changes Only" as the Report Type
- 7. Select the report format (PDF, HTML or Excel)
- 8. Select the "Report" button

Generate report for school year 2014 - 2015

Position filter:

Council filter:

Display info for: ☐ State ☐ Districts ☐ Councils ☒ Units

Display columns for: ☒ Position ☒ Name ☒ EMail ☒ Phone

☒ Cell ☒ Address ☒ Changes

Report Type: ☐ Full Report ☒ Changes Only

- The report generated contains a column at the end on the right side that indicates what information has changed.

Panda Elementary				Officer/Board Member Contact Report			
				School Year 2014-2015			
FEIN / Position	Unit ID / Title	Name	EMail	Phone #	Cell #	Address	What Changed
96		CSM Test Unit #8					
Treasurer	Treasurer	Bonzo, Ed	ptaez@csncentral.com				Position Dropped
Treasurer	Treasurer	Douglas, Colleen	cdouglas@csncentral.com				New Personnel
Advisor/Mentor/Liaison	Student Advisor	Baldwin, Sam	sbaldwin@csn.com			123 Main St	Position Dropped
Financial Secretary	Financial Secretary	Smith, Jane	janesmith@email.com	(877)944-7798		1234 THis St. City, CA 95687	New Personnel
President	President	Bonzo, Ed	ptaez@csncentral.com				New Personnel

Officer Report:

CAPTA has the ability to view all officers for Districts, Councils, and Units. Districts can see Council and Unit Officers within their District. Councils may view their Officers as well as Unit Officers under them. Units can see only their own Officers.

1. While on the School Year you wish to report on, select the "Generate Report" button
2. Choose the information you wish to display by checking/uncheck the boxes
3. Select "Full Report" as the Report Type
4. Select the report format (PDF, HTML or Excel)
5. Select the "Report" button

Generate report for school year 2013 - 2014

Position filter:

Council filter:

Display info for: ☐ State ☐ Districts ☐ Councils ☒ Units

Display columns for: ☒ Position ☒ Name ☒ EMail ☒ Phone

☒ Cell ☒ Address ☒ Changes

Report Type: ☒ Full Report ☐ Changes Only

- If you have already built a Change Log and you have the "Changes" box checked, the report generated will show you what information has changed. If no information has changed the column will be blank.

Panda Elementary			Officer/Board Member Contact Report				
			School Year 2013-2014				
FEIN / Position	Unit ID / Title	Name	Email	Phone #	Cell #	Address	What Changed
96		CSM Test Unit #3					
Treasurer	Treasurer	Douglas, Colleen	cdouglas@csmcentral.com				
President	President	Bonzo, Ed	ptaez@csmcentral.com				
Financial Secretary	Financial Secretary	Smith, Jane	jan smith@email.com	(877)944-7798		1234 This St City, CA 95687	