



AAUW California

BOR Webinar

Date: May 22, 2023



Welcome

Presentation materials:

- Download the presentation from the AAUW California website home page.
- The meeting recording, a summary Q&A document and example documents will be posted following the meeting.

Questions:

- Use the Q&A function to pose a question. We'll stop periodically to answer general questions.
- Chat has been disabled.

The screenshot shows a Zoom 'Question and Answer' window. At the top, there are two tabs: 'All questions (1)' and 'My questions (1)'. A red dashed arrow points from the text 'Check here for answers to all questions.' to the 'All questions (1)' tab. Below the tabs, a message from 'You' at 09:45 AM asks 'Where can I download the presentation?'. A 'Collapse all (1)' button is visible. Below that, a message from 'AAUW California' at 09:46 AM is shown. At the bottom, there is a text input field with the placeholder 'Type your question here...'. A red dashed arrow points from the text 'Type your question here.' to this input field. In the bottom left corner, there is a message: 'Chat has been disabled. Use the Q&A function'. At the bottom of the window, there are two circular icons: 'Chat' (highlighted with a yellow circle) and 'Q&A' (highlighted with a red circle). A red dashed arrow points from the 'Q&A' icon to the text 'Type your question here.'. In the bottom right corner, there is a red 'Leave' button.

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Welcome



Sandi Gabe
President



Julika Barrett
Office Manager



Agenda

- What is the BOR?
- What is new this year?
- Your role
- How to log in
- How to add 2023-2024 officers
- How to correct errors
- How to verify your 2024 branch roster
- Support options



Branch Officer Reporting System

What is it?

- A database of California branch leaders and state committee members that facilitates communication between AAUW California state and branch officers

Note: AAUW National maintains a separate member database, the Community Hub. The national and state records need to be updated annually and separately.

How is the information used?

The information is used to produce:

- **Job-specific email distribution groups** which are used to send important email messages from the state organization to branch officers such as the monthly Board to Board newsletter.
- **Annual directory** of branch leaders. The list of officers is available on the state website.



The New BOR

Why did we replace the BOR?

- The previous system was customized using old technology that is no longer widely supported.
- System updates are no longer supported (i.e. adding new branch positions.)
- The developer is no longer in business.

What improvements does the new system provide?

- New look and feel.
- You can designate an officer for multiple branches.
- New positions have been added.
- You can designate a delegate to enter the BOR data.
- Enhanced directory functionality.
 - Increased search capabilities allow members and leaders to find similar positions across the organization.

Your Role

Enter your roster of incoming officers and other branch leaders during the month of June.

Key Dates:

- Monday, June 5th - Announcement email distributed and updates begin
- Monday, June 12th - Office hours (5-7 pm)
- Saturday, July 1st - Updates end
- After Saturday, July 1st - Report any branch officer changes to webteam@aauw-ca.org.



Getting Started

Gather your list of officers.

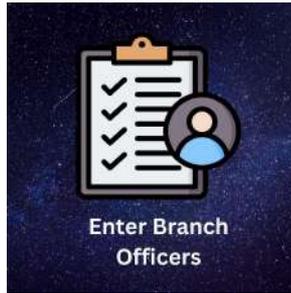
- Name
- Full address
- Phone number(s) - mobile and/or landline
- Email address
- Position(s)
- Branch

- President
- President-elect
- AAUW Fund
- Finance
- Membership
- Program
- College University
- Public Policy
- Diversity, Equity and Inclusion
- Governance
- Secretary
- Speech Trek Coordinator
- Gov Trek Coordinator
- Tech Trek Branch Coordinator
- Tech Trek Branch Finance Coordinator
- Tech Trek TTAG Coordinator
- Webmaster
- Newsletter Editor
- Social Media Coordinator
- Technology Coordinator



Four Easy Steps

1. Log in.
2. Enter your branch officers.
3. View your 2024 list of officers.
4. Correct errors or omissions in your roster.



System Tips

- There is a menu at the top of the screen for most functions. Use it to navigate to the sections of the BOR.
- Use the back key if needed to return to a previous page.
- If you limit your search to your branch and service years of 2023 and 2024, you can easily find officers from last year and see if you've added them for 2024.



Logging into the BOR

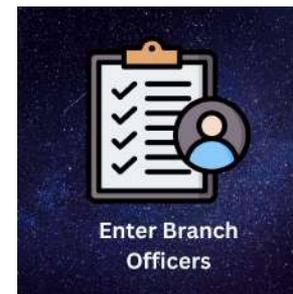
- Choose *Login to the BOR System* from the **Branch Tools** menu.
- Enter your username and password. The first time you log in choose “*Lost your password?*”
- Choose “*Log in.*”.
- You will be directed to the BOR home page.



The screenshot shows the AAUW website interface. On the left, a navigation menu is visible with the following items: CA BUSINESS, BRANCH TOOLS (highlighted in red), AAUW FUND, and P. Under the BRANCH TOOLS menu, there are four sub-items: BRANCH FINANCE, BRANCH AND IBC GOVERNANCE, LOGIN TO THE BOR SYSTEM (highlighted in red), and BRANCH OFFICER REPORTING SYSTEM. On the right, the login page is displayed with the heading "Login to the BOR System". Below the heading, there is a message: "This is the login page for the BOR." There are two input fields: "Username" and "Password". The "Log In" button is highlighted with a red border. Below the input fields, there is a checkbox for "Remember Me" and a link for "Lost your password?". A red text box above the "Username" field contains the message: "Your username is your email address".

Entering Your Branch Roster Information

- Search for officers within the database. Filter your search by:
 - Branches
 - Position
 - Last name
 - Service years
- Choose the officer
 - Confirm or update their contact information.
 - Designate their position(s).
 - Designate the branch.
- Repeat until all officers are added.



If you are unable to find the officer, add a new branch officer.

Review Your Roster

Review your branch roster in the 2024 State Directory.

- Filter by branch to see your incoming officers.
- Note any officers or positions that need to be adjusted.
 - Use the *Correct Branch Officer Listing Error* function to correct any issues.
- Print the list of officers for your records (optional).



This listing will become the active directory posted on the top menu of the state website July 1st.

Correcting Your Branch Officer List

Find your officers. Filter by:

- Last name
- Branch
- Position

You can update the three columns highlighted in red.

1. Choose the officer name under “Edit Contact” to update name spelling, address, phone, email address.
2. Update their position - add or remove. Remember to click the green check mark to accept the change or the red x to ignore the change.
3. To remove them from the 2024 list, make them “Active” = no. They will remain on the list but will not appear in the directory.

Repeat as many times as necessary to correct the officer listing.



Support Options

1. Review the BOR Reference Guide.
2. Attend office hours on June 12th.
3. Submit a request for support by sending an email to webteam@aauw-ca.org. Include as much information as possible about where you are experiencing difficulties.

