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Chapter Roster and Utilizing Excel

Contents:

- [About your chapter roster](#)..... 1
- [Protecting Member Information](#)..... 2
- [Accessing your chapter roster](#)..... 3
- [Utilizing Microsoft Excel to further organize your chapter roster](#)..... 4
- [Exporting your roster to Microsoft Excel](#)..... 4
- [Adding filters to Excel data](#)..... 5
- [Sorting your roster data in Excel](#)..... 6

About Your Chapter Roster

The chapter roster is available to all active activities coordinators on imakeanimpact.org. It is a complete list of all members assigned to the chapter. There are multiple reasons a member may become part of your chapter.

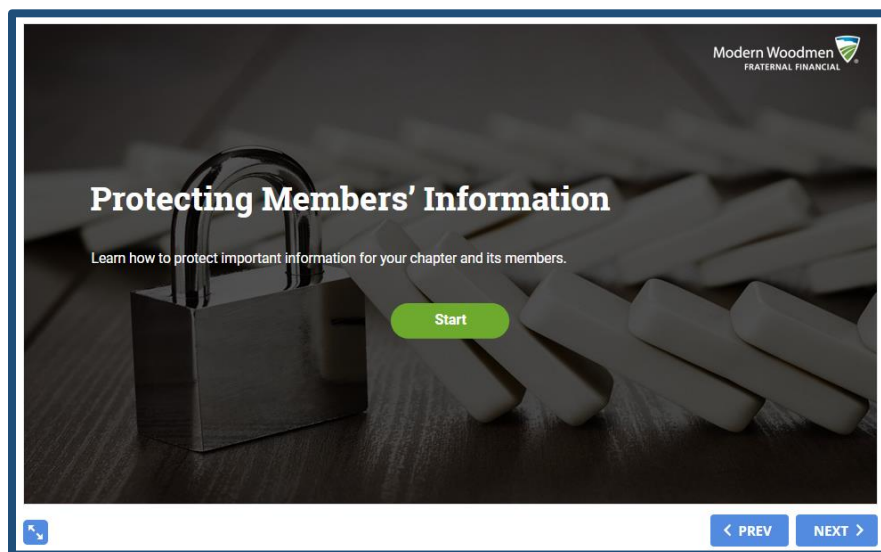
- The chapter number is assigned to the member’s certificate based on current address.
- A member has a change of address that moves them to an area around the chapter.
- A member chooses to be transferred to the chapter.
- A regional director reorganizes chapters based on location and changes the chapter number accordingly.

Your roster gives you access to helpful member information including:

- Name
- Address
- Phone number
- Age
- Gender
- How long the member has been a chapter member
- How long the member has been a Modern Woodmen member

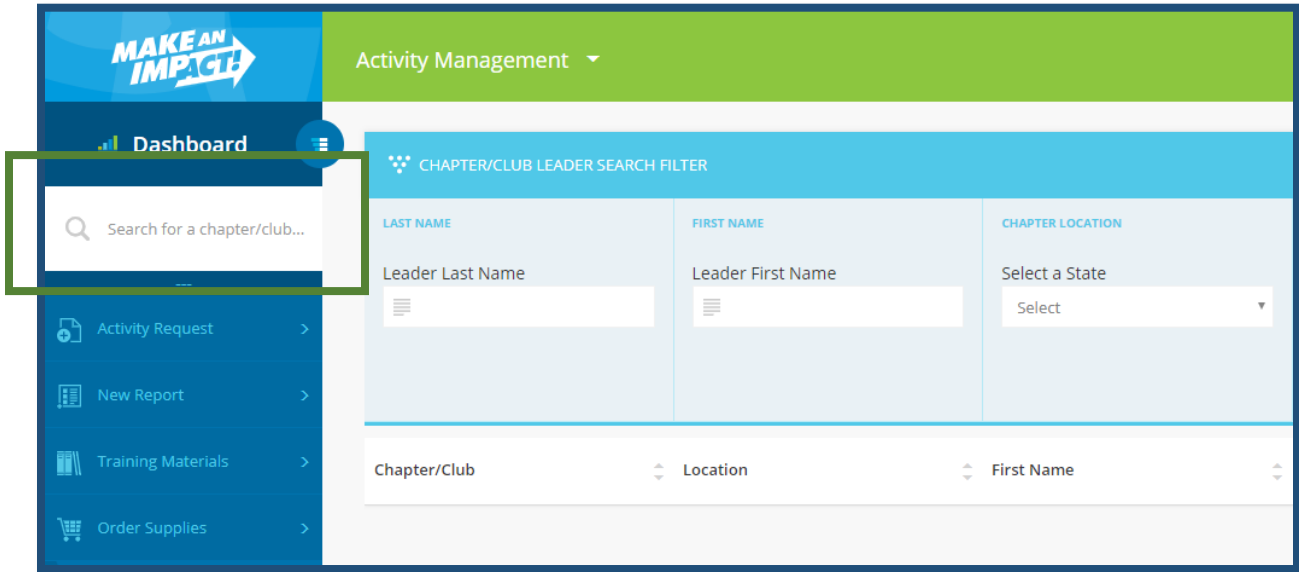
Protecting Members' Information

It is always important to protect chapter members' information. For tips on how to protect members' information, complete the module on [Protecting Members' Information](#) on the Training Modules and Quizzes page of the Training Materials site.

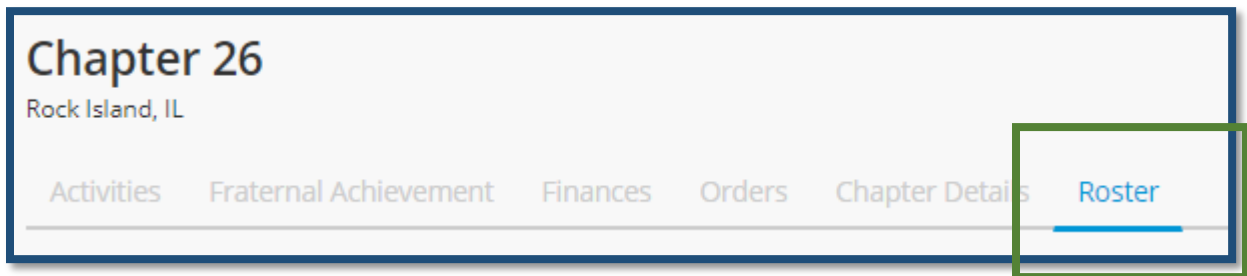


Accessing your chapter roster

Step One: Log in to imakeanimpact.org. Search for your chapter in the left-hand navigation search bar.



Step Two: Click *Roster* in the dashboard navigation.



All members in your chapter roster will be listed.

The screenshot shows the chapter roster table. The table has columns for 'First Name', 'Last Name', 'Address 1', 'Address 2', 'City', 'State', 'Zip Code', and 'Phone N'. The data is as follows:

First Name	Last Name	Address 1	Address 2	City	State	Zip Code	Phone N
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	MILAN	IL	61264	(000) 000
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	MILAN	IL	61264	(309) 787
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	SUN CITY WEST	AZ	85375	(309) 737
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	MOLINE	IL	61265	(309) 797

Step Three: Use the sorting arrows to sort your roster. Sorting arrows are available for all columns. Click the up arrow to sort A-Z. Click the Down arrow to sort Z-A.



Utilizing Excel to Organize your Chapter Roster

There are many benefits to utilizing Excel to further organize your chapter data.

- Sort your list based on last name, address, city, state, age, gender, or how long they have been a chapter member to see a sorted version of your entire list.
- Filter your list based on criteria such as last name, address, city, state, age, gender or how long they have been a chapter member to see a partial, filtered version of your list.
- Create customized or separated lists of members based on preferred criteria (eg. *List 1 – members under age 20, List 2 – members ages 20-39, List 3 – Members ages 40-59, etc.*) See the [Member Infographics – Get To Know Your Members](#) resource on the Training Materials Site to find out more about member interests according to age generation and where they live.
- Track your own member data such as:
 - members who have completed the [Member Interest Survey](#) and the survey results.
 - members who have paid ahead for an event.
 - members you have sent the [New Member Letter](#).

Exporting your Roster to Excel

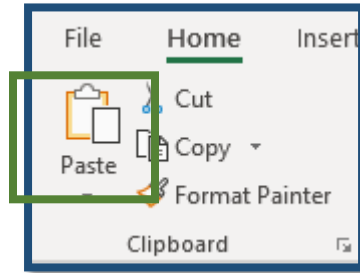
Prerequisite: You must have Microsoft Excel downloaded to your computer to utilize Excel to organize your chapter roster.

Step One: Starting with the first name of the first member, click and drag to highlight the information on your roster.

First Name	Last Name	Address 1	Address 2	City	State	Zip Code	Phone N
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	MILAN	IL	61264	(000) 000
E [REDACTED]	[REDACTED]	1 [REDACTED]	[REDACTED]	MILAN	IL	61264	(309) 78
C [REDACTED]	[REDACTED]	[REDACTED] DR	[REDACTED]	SUN CITY WEST	AZ	85375	(309) 73
J [REDACTED]	[REDACTED]	3 [REDACTED]	[REDACTED]	MOLINE	IL	61265	(309) 79

Step Two: Once all information is highlighted, right click and select *Copy*.

Step Three: Open a new Excel document and click *Paste*. You should now see your roster data on your Excel spreadsheet.



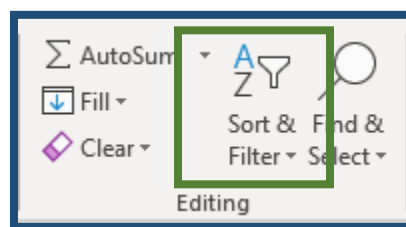
Adding filters

Video: [How to filter data in Excel](#)

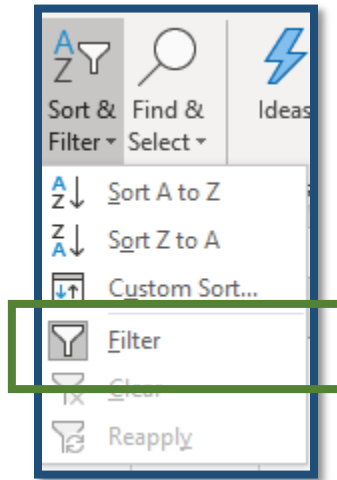
Step one: Highlight the first row (row one)

1	A	B	C	D	E	F	G	H	I	J	K	L
	First Name	Last Name	Address 1	City	State	Zip Code	Phone Number	Email	Age	Gender	Chapter Member Since	Modern Woodmen Member Since

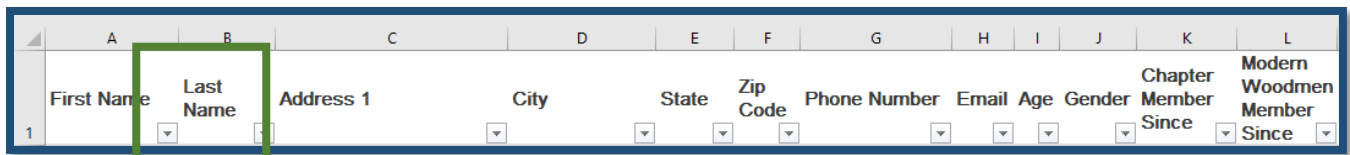
Step two: In the *Editing* section of the toolbar, click *Sort & Filter*.



Step three: Click *Filter* in the dropdown.



Step four: Use the filter arrows associated with the row one column headings to filter information as needed. (*The arrow to filter by last name is circled in the example below*)

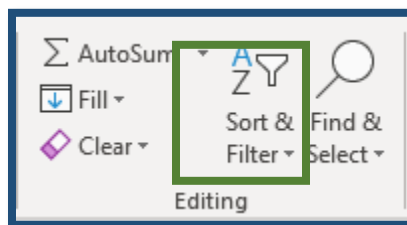


Sorting Roster Data

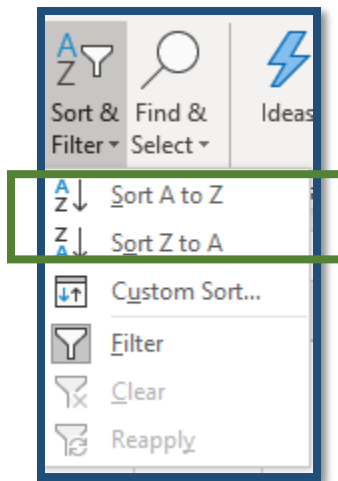
Video: [How to sort data in Excel](#)

Step one: Highlight the first row (row one)

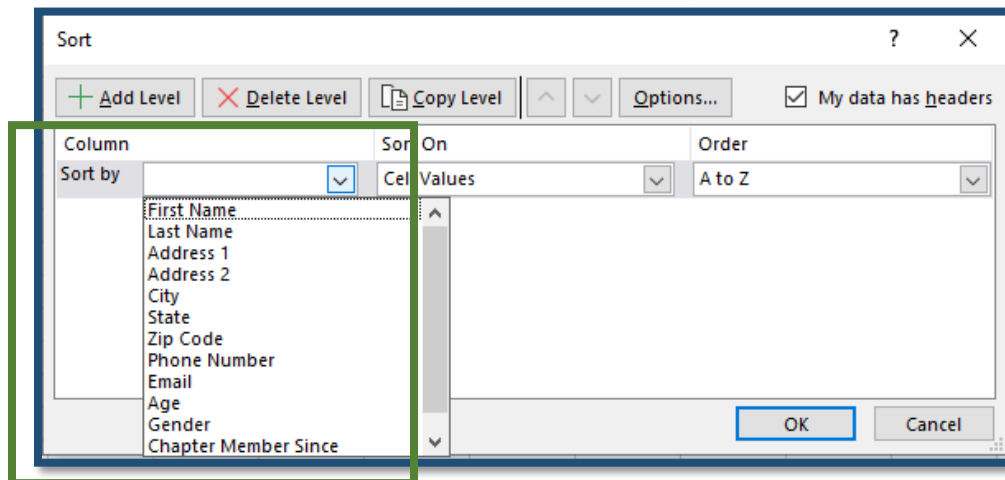
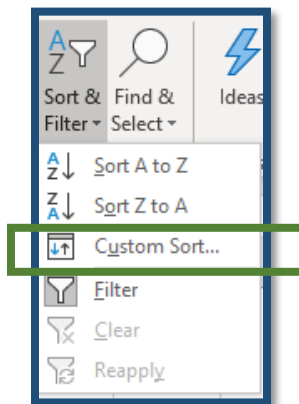
Step two: In the *Editing* section of the toolbar, click *Sort & Filter*.



Step three: Click *Sort A to Z* or *Sort Z to A* in the dropdown to alphabetize your data.



To Custom Sort: Click *Custom Sort* to sort by other roster characteristics. In the sort by dropdown select the topic to sort by such as last name, address, city, state, age, gender, how long they have been a chapter member since and more.



In the *Order* column, select the order in which you'd like the information to display.

