

# LodgeMaster System Description

This document outlines the features and capabilities of the OA LodgeMaster system. OA LodgeMaster ('OALM') is a lodge membership management system designed to support the operations of lodges throughout the Order of the Arrow. It is developed and offered by the National OA Committee as an optional support application, and although JTE must be submitted using this system, the overall use of OALM is not a requirement.

## Basic Rules

- OA LodgeMaster supports a single lodge per council.
- Council numbers are used to identify lodges when a numeric code is necessary. Lodges are otherwise represented by the lodge name, council name, and council number.

## Initial Setup

- A lodge submits a 'Appointment Of OA LodgeMaster Lodge Administrator' form to the National Scout Office.
- The OA LodgeMaster staff contacts the lodge administrators and requests the current lodge database.
- A new OA LodgeMaster database is created for the lodge and existing data is migrated.
- The OA LodgeMaster staff contacts the lodge when their database is ready.
- Lodge administrators login and begin creating users and setting up the database.

## Features & Data

The following features and types of information are available within OA LodgeMaster:

- **Member Data and History:** Store and view BSA Person ID, name, contact information (postal address, multiple e-mail addresses, multiple phone numbers), date of birth, dates and locations of election and honors, dues paid status and history, unit information, ceremony capabilities, event attendance history, leadership position history, member resources (e.g., hobbies, skills, equipment), award history, and service hour history.
- **Event Management:** Input event information (including date, location, ceremonies offered, service hours offered, and training offered) and manage events with on-site event sign-in and registration, event history, dues unpaid alert for event attendees, event fee tracking, and automatic lodge calendar creation.
- **Ordeal Management:** Manage ordeal-specific information, including clan and elangomat tracking, candidate data, and roster listing.
- **Ceremony Team Tracking:** Keep track of ceremonialists in the lodge, group by team, see which ceremonies each team is capable of performing, create custom ceremonies and extra roles specific to the lodge.
- **Service Hour Tracking:** Track service hours performed by members throughout the year. Store service hours individually for a member and/or apply a certain amount of service hours to each attendee of an event in the events listing.
- **Lodge Asset Tracking:** Track lodge property/assets (such as ceremony gear, keys, etc.) and check out items to individual lodge members.
- **Trading Post Inventory:** Manage trading post inventory, store product information, calculate costs and profits based on inventory sold at an event or during a specified time period.
- **Journey To Excellence Calculations:** Automatically calculate some Journey To Excellence requirements, including service hours, unit contacts and visitations, brotherhood conversions, and more. Input Journey To Excellence attainment data each year to create trend reports.
- **Unit Information:** Store unit contact information and meeting information and keep track of unit communications (camp promotions visits, unit elections, and other communications).
- **Lodge Finance:** Track lodge finances, based on the guidelines outlined in the Lodge Finance Record Book.
- **Mass E-mail:** System to send e-mails to specific groups of lodge members.

## Reports & Information

Following is a sample of the list of reports that are available within OA LodgeMaster:

- **Member Information:** Roster by chapter, roster by unit, full lodge roster, roster by leadership positions, award history, brotherhood eligibility list, BSA dues paid list, BSA dues unpaid list, OA dues paid list, OA dues unpaid list, individual member history, member resource list, membership cards, new member list by chapter, new member list by event, vigil eligibility list.
- **Assets & Inventory:** Assets list, assets checked out, assets overdue, trading post inventory listing.
- **Auction:** Auction bidder list, auction final sale summary, auction item inventory, auction outstanding payments, bidder invoice.
- **Ceremonies:** ceremony list by ceremonialist, ceremony list by ceremony team, ceremony list by chapter.
- **Chapters:** Chapter information report, chapter leadership roster.
- **Events & Locations:** Event attendance list by chapter, event attendance list by cost, event brotherhood eligibility list, event dues unpaid, event role roster, event summary report, event unpaid list.
- **Lodge Calendar:** Lodge calendar by ceremonies offered, lodge calendar detailed view, lodge calendar month view, lodge calendar yearly view.
- **Ordeals:** Ordeal attendance list, ordeal candidate list, ordeal clan list.
- **Finance:** Budget report, detailed account activity report, cash flow report.
- **Service:** Annual service report, service report by chapter, service report by event.
- **Units:** Scoutmaster list, unit contact list, troop/team representative list.
- **Journey To Excellence:** Vital statistics by lodge and by chapter, Journey To Excellence petition.
- **Lodge Information:** LEC sign-in sheet, lodge information, lodge leadership roster.
- **Trend & Analysis:** Brotherhood conversion statistics, dues trends analysis for single year and multiple years, dues trends analysis by month.
- **Mailings & Personalized Forms:** Mailing labels, bulk mailing audit & zip code count.

## Other Important Features

- Import and export data to or from Microsoft® Excel® or CSV.
- Multi-user security system allows multiple users of the lodge to operate in OA LodgeMaster with different permissions levels.
- Export and import data and results for ScoutNET's BSA Membership Verification System to confirm BSA Dues Paid status.

- Report Creator allows the creation of custom, user-definable reports.
- OA LodgeMaster automatically checks for new versions of the software.
- OA LodgeMaster is constrained only by file size; i.e., the number of records in the database is not limited as long as there is adequate hard drive space available.
- Automatic, built-in data features. These features happen behind the scenes:
  - Nightly backup of entire lodge database on the OA LodgeMaster servers.
  - Data and user/security synchronization between all the online version and all installed offline versions so that all users of OA LodgeMaster up-to-date.