



An Introduction the Pershing Rifles Unit Management System (UMS)

Revised 6 October 2015

Table of Contents

Introduction	3
Obtaining UMS Login Information	3
Company Email Account Access	3
Forgotten Username/Password	4
Changing Your Password	5
Editing/Completing Your Company Profile	6
Transferring Member Status	7
Changing Member Status	8
Adding New Members	9
UMR	11
Membership Dues	12
E-Signature	13

Introduction

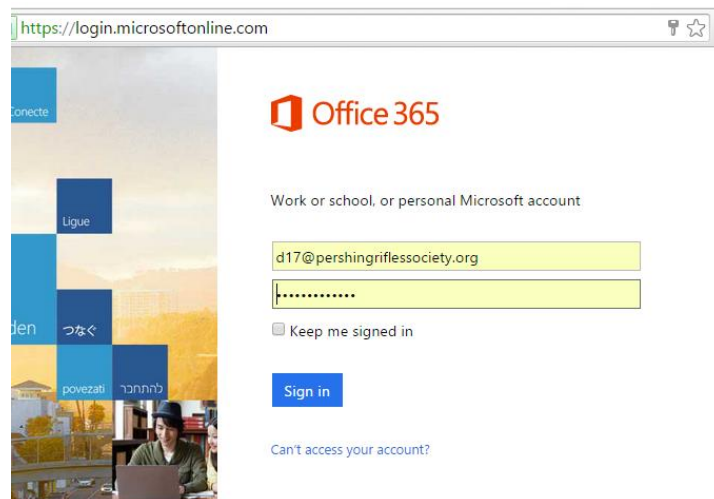
The Unit Management System (UMS) provides an automated method for administering and managing the records of Pershing Riflemen, events, and equipment. It as a central location for all reports related to a given company. The purpose of this manual is to provide instructions on how to use the most crucial and basic functions of the UMS on a company level.

Obtaining UMS Login Information

Each company should have received an e-mail to their company e-mail account stating the username and password of the administrative account for their company. If they have misplaced this information they may use the Forgotten Password link on the login page to obtain their username and a new password. The link for the Administrative Panel is www.theprgroup.org/ums/Admin. Please note, the “A” in “Admin” must be capitalized in the web address bar, or you will be directed to the wrong login page.

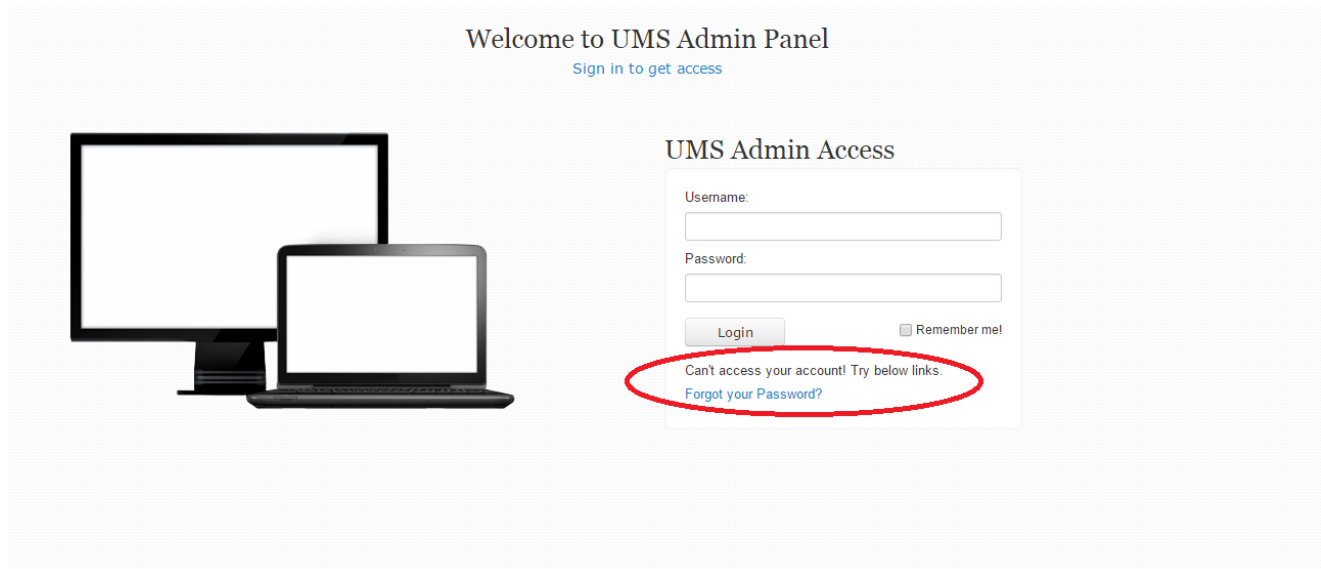
Company Email Account Access

Each company has an official email address which is hosted through Microsoft Office 365. The login page for the company email address can be found at <https://login.microsoftonline.com>. If you do not have access to your company email account, please contact the National Headquarters J6 via email at J6@PershingRiflesSociety.org. Below is an example of the login page.



Forgotten Username/Password

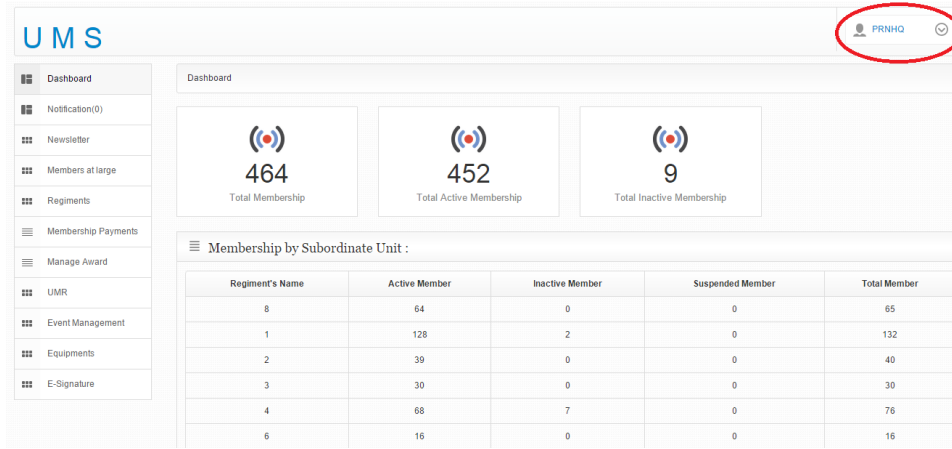
1. Click the Forgot your Password link at the bottom of the login screen



2. Enter your Email-id
 - a. Note: The Email-id will not work unless the domain name of the email address is typed in as @PershingRiflesSociety.org
 - i. Example: The e-mail ID is the company letter designation followed by the regiment. For example company A-2's email would be A2@PershingRiflesSociety.org
3. Click Submit
 - a. An e-mail will be sent to your Office 365 company e-mail account with your username and new password.
 - b. Note: It is recommended that your password be changed after you have reset it.

Changing Your Password

1. Click on your company username in the upper right corner of the screen



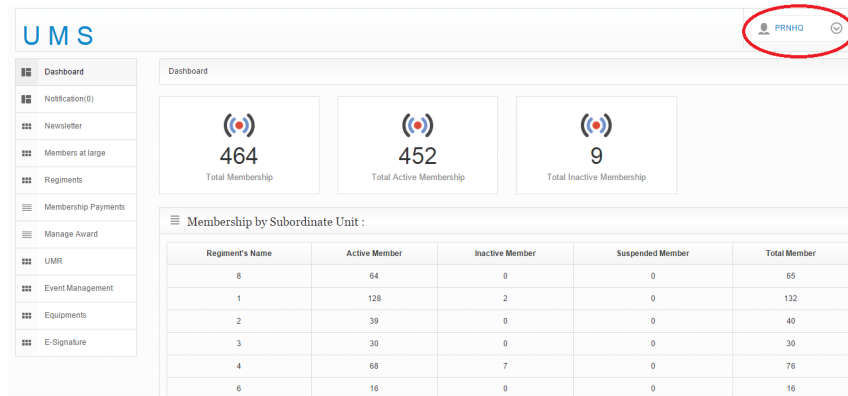
2. Select Change Password from the drop down menu
3. Complete the Change Password Form

The screenshot shows the 'Change Password Form' with three input fields: 'Email-id*', 'Old Password*', and 'New Password*'. Below the fields are two buttons: 'Save changes' (highlighted in blue) and 'Cancel'.

- a. Note: The Email-id will not work unless the domain name of the email address is typed in as @PershingRiflesSociety.org
 - i. Example: The e-mail ID is the company letter designation followed by the regiment. For example company A-2's email would be A2@PershingRiflesSociety.org
4. Click Save Changes
 - a. Note: You should receive an e-mail with your company username and the new password

Editing/Completing Your Company Profile

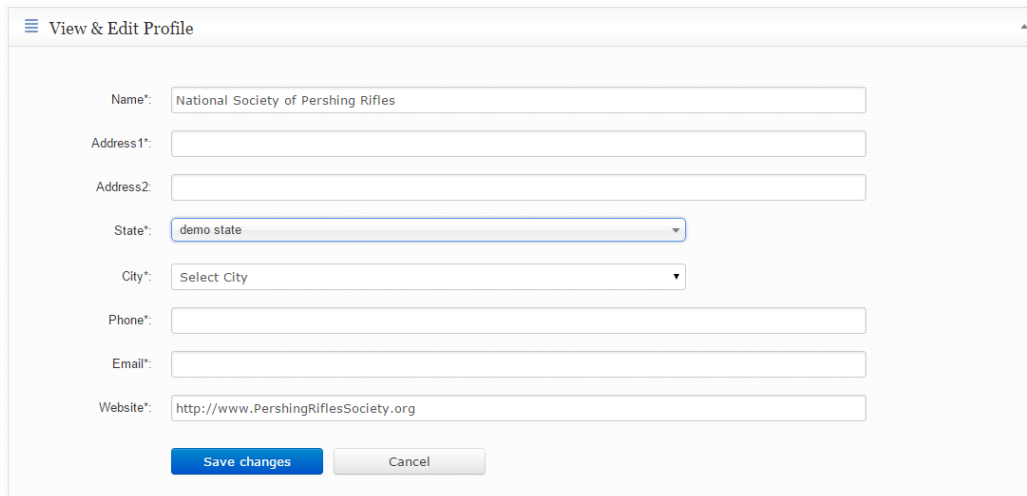
1. Click on your company username in the upper right corner of the screen



The screenshot shows the UMS dashboard. In the top right corner, the user's profile icon and name 'PRNHQ' are circled in red. The dashboard includes a sidebar with navigation options, a main content area with three summary cards for membership counts, and a table titled 'Membership by Subordinate Unit'.

Regiment's Name	Active Member	Inactive Member	Suspended Member	Total Member
8	64	0	0	65
1	128	2	0	132
2	39	0	0	40
3	30	0	0	30
4	68	7	0	76
6	16	0	0	16

2. Select My Profile from the drop down menu
3. Complete the View & Edit Profile form



The screenshot shows the 'View & Edit Profile' form. The form contains the following fields:

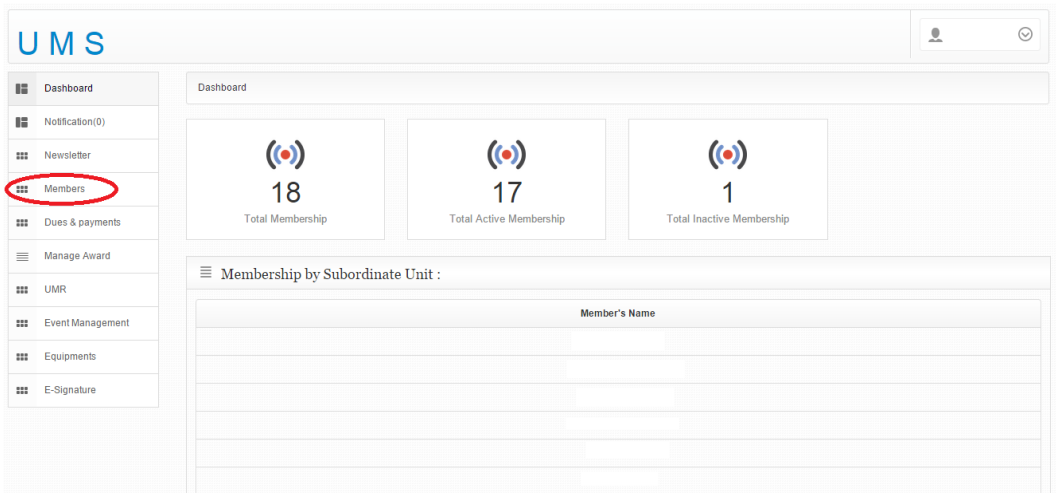
- Name: National Society of Pershing Rifles
- Address1*: [Empty]
- Address2*: [Empty]
- State*: demo state (dropdown menu)
- City*: Select City (dropdown menu)
- Phone*: [Empty]
- Email*: [Empty]
- Website*: http://www.PershingRiflesSociety.org

At the bottom of the form, there are two buttons: 'Save changes' (blue) and 'Cancel' (grey).

4. Click Save Changes

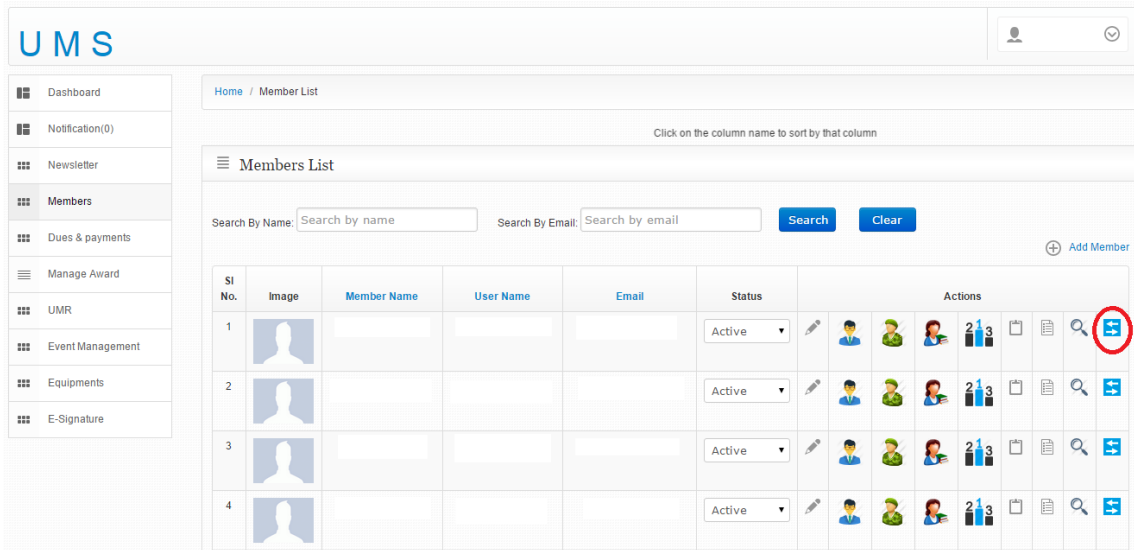
Transferring Member Status

1. Go to the Members tab on the left hand sidebar



The screenshot shows the UMS dashboard. On the left sidebar, the 'Members' tab is highlighted with a red circle. The main content area displays three summary cards: 'Total Membership' with a value of 18, 'Total Active Membership' with a value of 17, and 'Total Inactive Membership' with a value of 1. Below these cards is a section titled 'Membership by Subordinate Unit' with a table header 'Member's Name'.

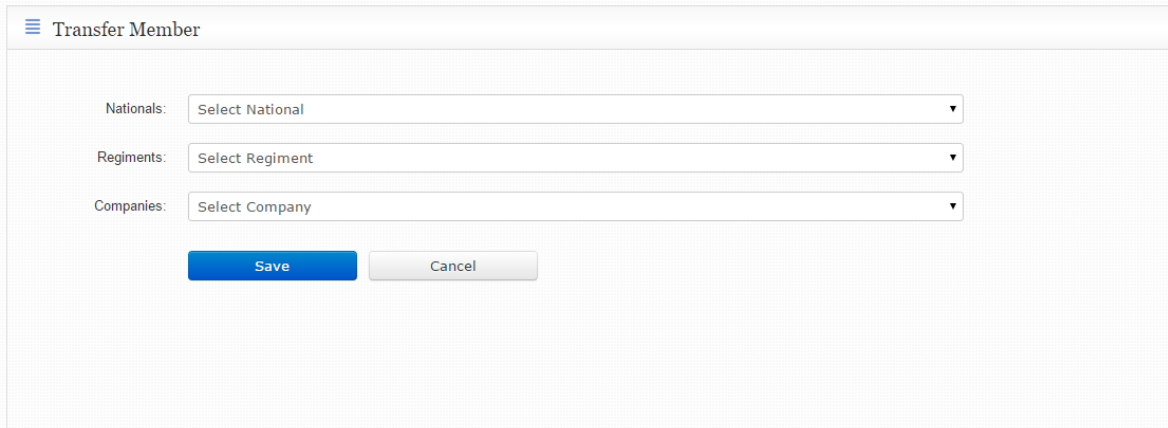
2. Click on the Transfer button beside the user that you wish to transfer



The screenshot shows the 'Members List' page in the UMS system. The sidebar on the left has the 'Members' tab selected. The main content area features a search bar with 'Search By Name' and 'Search By Email' fields, and 'Search' and 'Clear' buttons. Below the search bar is a table with the following columns: 'Sl No.', 'Image', 'Member Name', 'User Name', 'Email', 'Status', and 'Actions'. The table contains four rows of member data. In the 'Actions' column for the first row, the 'Transfer' icon (a blue square with a white arrow) is highlighted with a red circle.

Sl No.	Image	Member Name	User Name	Email	Status	Actions
1					Active	
2					Active	
3					Active	
4					Active	

3. Complete the Transfer Member Form

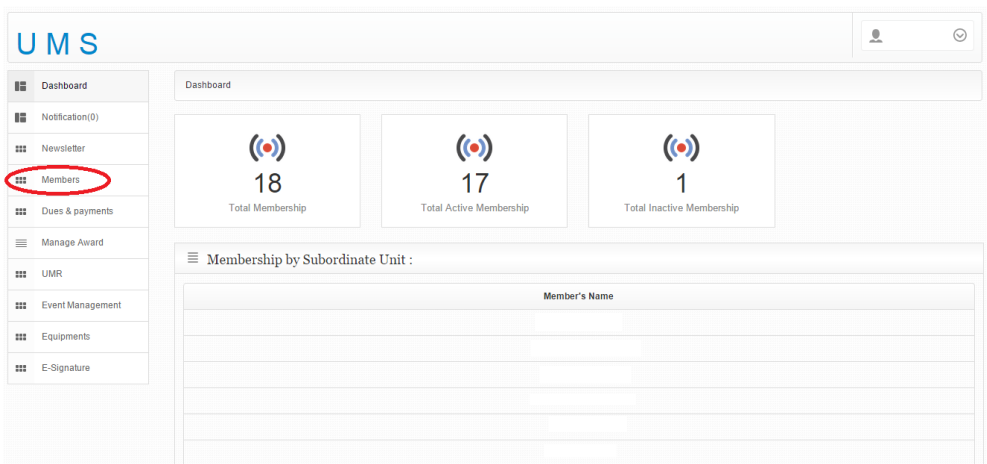


The image shows a web form titled "Transfer Member". It contains three dropdown menus: "Nationals:" with the text "Select National", "Regiments:" with the text "Select Regiment", and "Companies:" with the text "Select Company". Below these menus are two buttons: a blue "Save" button and a grey "Cancel" button.

4. Click Save

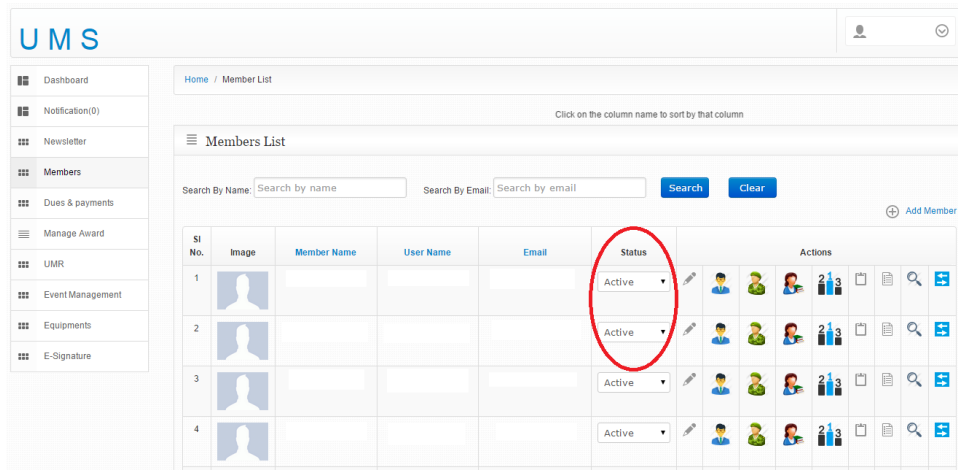
Changing a Members Status

1. Go to the Members tab on the left hand sidebar

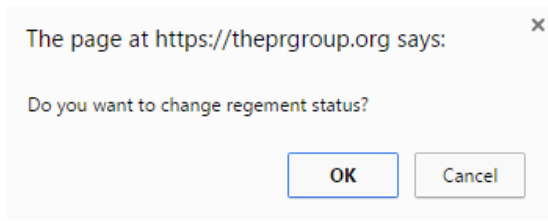


The image shows the UMS (United Membership System) dashboard. The left sidebar contains a menu with the following items: Dashboard, Notification(0), Newsletter, **Members** (circled in red), Dues & payments, Manage Award, UMR, Event Management, Equipments, and E-Signature. The main dashboard area displays three summary cards: "Total Membership" with a value of 18, "Total Active Membership" with a value of 17, and "Total Inactive Membership" with a value of 1. Below these cards is a section titled "Membership by Subordinate Unit" with a table header "Member's Name" and several empty rows.

2. Click on the Status menu for the member whose status you wish to change

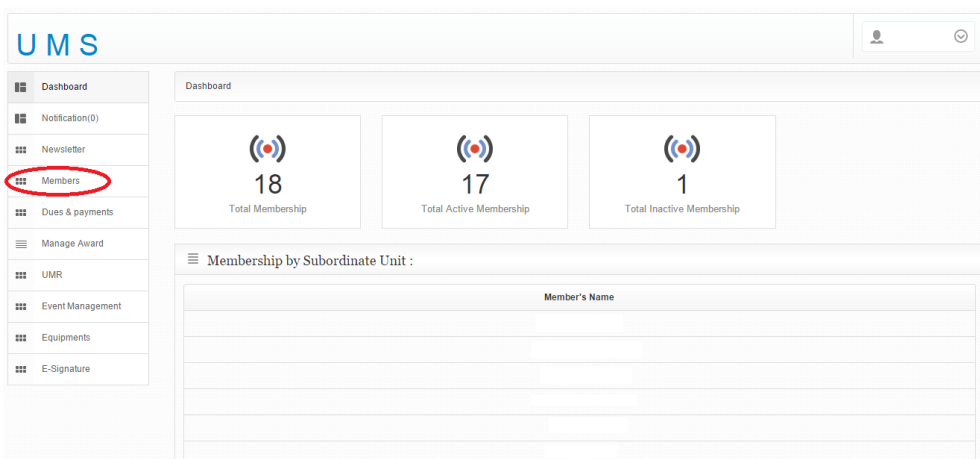


3. Select the new status from the pull down menu
4. Click Okay on the pop up window that appears
 - a. The new status of the user will appear under the users status



Adding New Members

1. Go to the Members tab on the left hand sidebar



2. Click Add Members

U M S

Home / Member List

Click on the column name to sort by that column

Members List

Search By Name: Search by name Search By Email: Search by email Search Clear

Add Member

SI No.	Image	Member Name	User Name	Email	Status	Actions
1					Active	
2					Active	
3					Active	
4					Active	

3. Complete the Add Member Form

- Note: The user can later add and edit the information that is on their profile

Add New Member

User Name:

Email:

Title:

First Name:

Middle Name:

Last Name:

Suffix:

Spouse First Name:

Spouse Last Name:

Address1:

Address2:

D.O.B:

Phone:

State:

City:

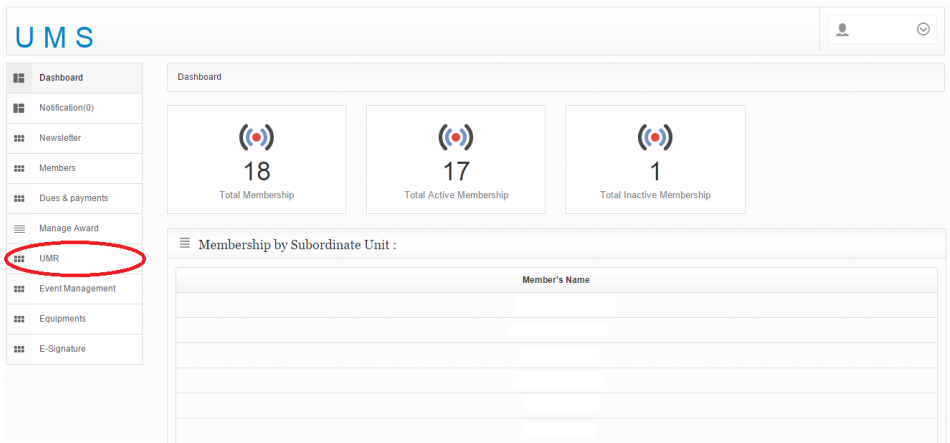
Website:

Upload Image: No file chosen
(Maximum Size 5 MB)
(Please upload 150X154 size image for best fit)

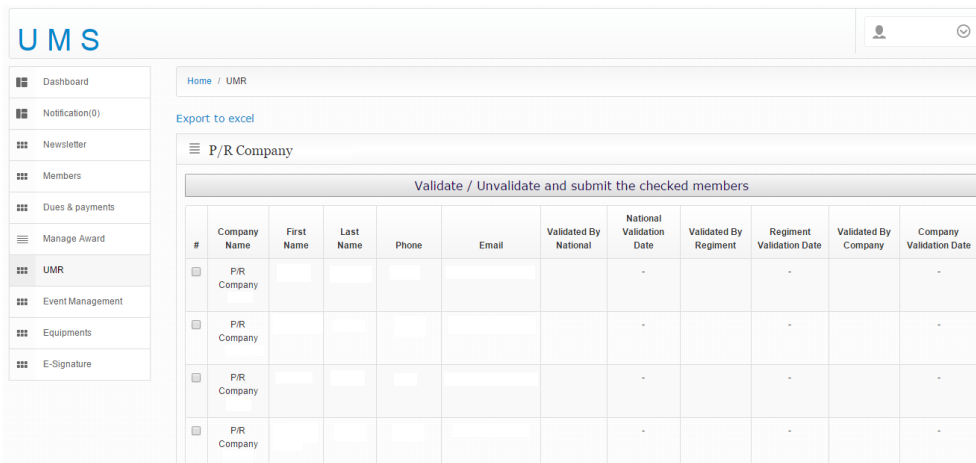
4. Click Save

UMR

1. Go to the UMR tab on the left hand sidebar



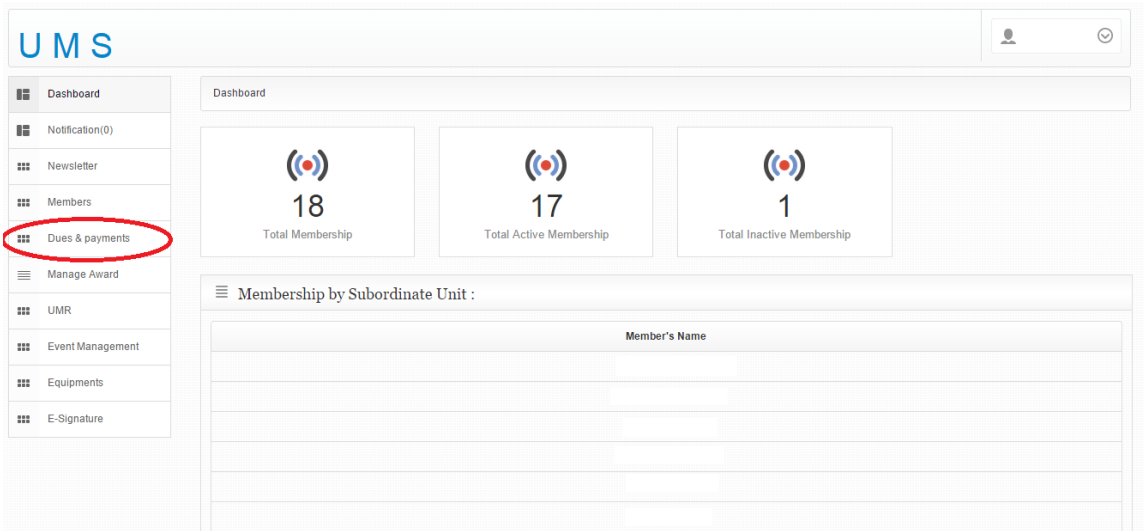
2. Check the member that you wish to validate or unvalidate
3. Click the Validate/Unvalidate Button



Membership Dues

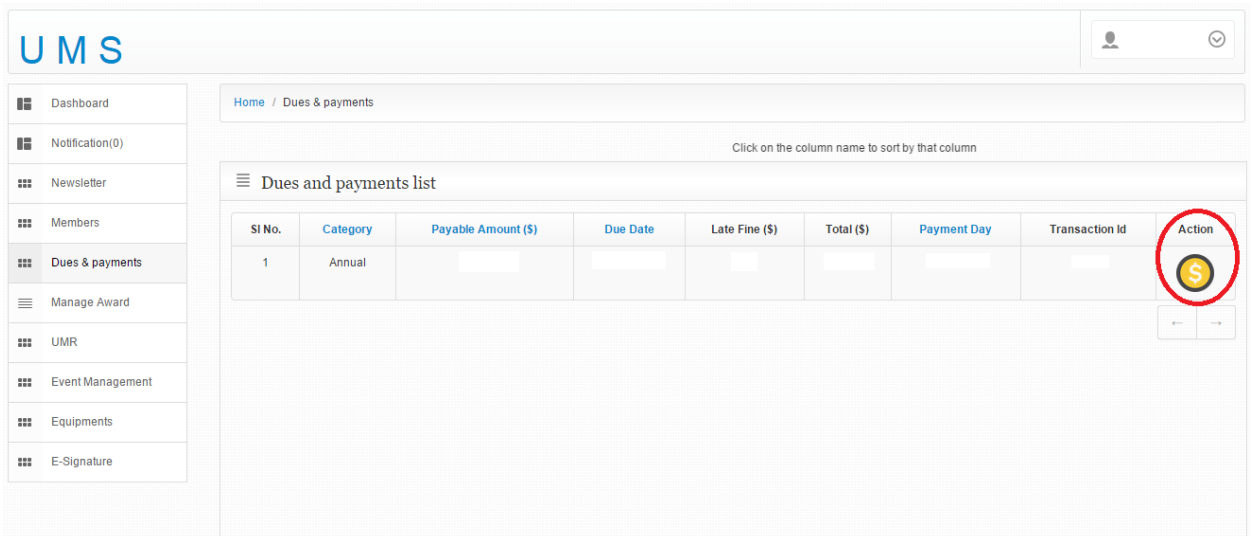
Before paying dues, companies are responsible for updating their membership roster, as is noted in the section above. If you do not ensure this is up to date, you may be overcharged.

1. Select Dues & Payments from the left hand sidebar

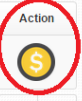


The screenshot shows the UMS dashboard. On the left sidebar, the 'Dues & payments' menu item is circled in red. The main dashboard area displays three summary cards: 'Total Membership' with a value of 18, 'Total Active Membership' with a value of 17, and 'Total Inactive Membership' with a value of 1. Below these cards is a section titled 'Membership by Subordinate Unit' with a table header 'Member's Name' and several empty rows.

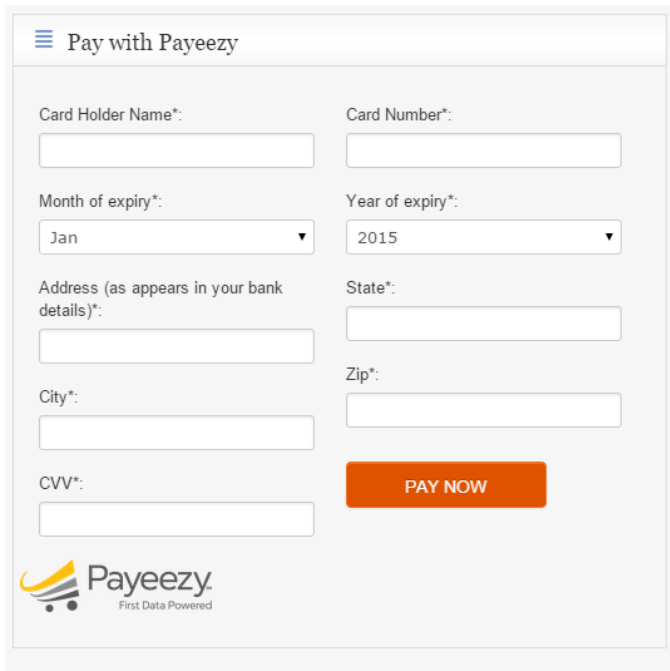
2. Select the Pay Now Button



The screenshot shows the 'Dues and payments list' page. The left sidebar is visible with 'Dues & payments' selected. The main content area has a breadcrumb 'Home / Dues & payments' and a table with the following columns: 'SI No.', 'Category', 'Payable Amount (\$)', 'Due Date', 'Late Fine (\$)', 'Total (\$)', 'Payment Day', 'Transaction Id', and 'Action'. The 'Action' column contains a red circular button with a white dollar sign icon. Below the table are pagination controls.

SI No.	Category	Payable Amount (\$)	Due Date	Late Fine (\$)	Total (\$)	Payment Day	Transaction Id	Action
1	Annual							

3. Fill out the Payeezy form

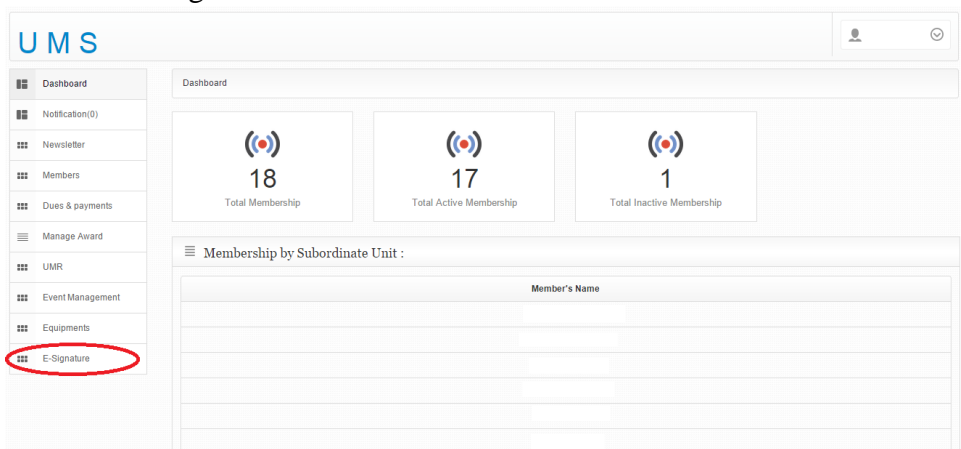


The image shows a web form titled "Pay with Payeezy". It contains several input fields: "Card Holder Name*", "Card Number*", "Month of expiry*" (with a dropdown menu showing "Jan"), "Year of expiry*" (with a dropdown menu showing "2015"), "Address (as appears in your bank details)*", "State*", "City*", "Zip*", and "CVV*". A prominent orange button labeled "PAY NOW" is located below the CVV field. The Payeezy logo, featuring a stylized yellow and blue graphic and the text "Payeezy First Data Powered", is positioned at the bottom left of the form area.

4. Select Pay Now

E-Signature

1. Go to the E-Signature tab on the left hand sidebar



The image displays the "UMS" (User Management System) dashboard. On the left, a sidebar menu lists various navigation options: Dashboard, Notification(0), Newsletter, Members, Dues & payments, Manage Award, UMR, Event Management, Equipments, and E-Signature. The "E-Signature" option is circled in red. The main dashboard area shows three summary cards: "Total Membership" with a value of 18, "Total Active Membership" with a value of 17, and "Total Inactive Membership" with a value of 1. Below these cards, there is a section titled "Membership by Subordinate Unit" which contains a table with a header "Member's Name" and several empty rows.

2. Complete the E-Signature Form

E-Signature

Signature:

Confirm Signature:

[Save changes](#)

3. Click Save Changes