



Comprehensive Data Management for Excellence in Union Management

- Data Research Group Corporation -

## UNION FUSION DESCRIPTION DOCUMENT



This document last modified on January, 2015

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### Abstract

This document provides the fundamentals for understanding the key elements of **Union Fusion**, DRG's enterprise system for managing 'All things Union'. This document will address key modules on the basis of their access through the primary and secondary menus that make up the user interface.

This document is not intended to be exhaustive regarding features and functions inside the framework, but will provide a sufficient overview to help new or prospective clients to familiarize themselves with the UF. Additional documents and information can be found at [www.unionfusion.com](http://www.unionfusion.com).

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# INTRODUCTION

[Union Fusion](#) is a browser-independent web solution built using Microsoft's ASP.NET architecture and SQL Server 2012/14. [Union Fusion](#) leverages DRG's **comprehensive framework** for business coverage across all union activity, real time! [Union Fusion](#) provides comprehensive access everywhere you have a computing device and an internet connection. Pull up member data on your iPad or mobile device. [Union Fusion](#) was designed to work with your current business activities by providing easy integration with your existing website.

The [Union Fusion](#) *supported modules* include the following:

- Total Contact Management
- Membership and Dues Management
- Education, Classes, OJT Hours, Upgrades
- Financials – Payments, Batch Processing, Account Management, Disbursements
- Communications (Emails, Text Messages, Voice Messaging)
- Reporting (Custom Queries, Exports, Custom Reports, Charting)
- Remittance Capture, Benefit Application and Management
- Content Management System
- Out of Work List / Referral Hall
- Organizing Tools
- Member Portal, Student Portal, Contractor Portal

There are numerous other processes supported within each of these modules. This document will expose a sufficient level of detail on these related processes to give potential clientele enough information to make solid business decisions regarding the potential use of our system.

[Union Fusion](#) is the only cloud-based solution that concurrently supports all three verticals in Union activity: Membership & Dues, Apprenticeship Management and Benefit and Pension Management. As such, it becomes an excellent prospect for a universal reporting application as well. The architecture design is very consistent throughout which reduces the complexity of the learning curve for new end users. As a solution, [Union Fusion](#) exceeds our competitors in numerous ways. As an organization, our commitment to our customers is unequalled.

# UNION FUSION

## DASHBOARD

The primary menu item labeled dashboard contains a breadth of communication and reporting tools for personal use by the end user currently logged in. These tools include the default homepage, charts & tables, tasks, messages, calendar and 'my reports'.

Much of the data populated in this area is initiated by numerous other interfaces in the solution. For example, when classes are scheduled for either a student or an instructor, they appear on the calendar for each one (student or instructor) as they are logged into the system.

A detailed description of each of these 2<sup>nd</sup> level menu items follows immediately in the information provided over the next few pages.

The screenshot displays the Union Fusion dashboard for a user named Ed Burg. The interface includes a top navigation bar with links to various modules like Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, and Admin. A secondary menu below the navigation bar highlights the Dashboard section, which includes links to Homepage, Charts & Tables, Tasks, Messages, Calendar, and My Reports. The main dashboard area is titled 'My Dashboard' and contains several widgets: 'Personal Info' showing user details, 'Upcoming Class Days' with a table, 'Upcoming Payments' with a table, 'Financial Summary' showing credit and payment balances, 'Education Statistics' with a table, 'Evaluations' with a table, and 'My Tasks (View All)' with a table. A right sidebar contains a search bar, quick links, help, recent reports, change history, notes, and recently visited sections.

**Personal Info**

Ed Burg  
No default address on record  
edb+default@datarg.com  
Record Status: Active  
Organization: Default Association Root Org  
Region:  
Job Classification:  
Person Status:  
Contact Groups:

**Upcoming Class Days**

Class	Where	Enrolled

**Upcoming Payments**

Order #	Amount	Due Before

[View all](#) | [Make a payment](#)

**Financial Summary**

Credit Balance: \$0.00  
Recent Payments:  
All Payments: \$0.00 (0)

**Education Statistics**

Type	Count
Applicants	0
Apprentices	0
Journeymen	0

**Evaluations**

Status	Count
Pending	0
Evaluatee Review	0
Staff Review	0

**My Tasks (View All)**

Summary	Due Date	Type	Completed	Regarding
Complete Assignment 2 Email me when completed	1/15/15			General Task

## Dashboard

The dashboard is the primary landing page for end users when they log into the system. Although the default landing page can be changed or controlled by number of different ways, it is typically the dashboard that comes up following user login. The information that is viewable to the end user is dependent upon what permissions the end user currently has with respect to related modules. For example, if the end user is permitted to see membership or apprenticeship data, then there will exist content blocks containing summary information about both of those modules. The information contained here is largely informational and more often than not, end users will navigate to some other aspect of the interface to either find someone or some company or carry out a specific function.

The screenshot displays the Union Fusion dashboard for a user named Ed Burg. The interface includes a top navigation bar with links to various modules like Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, and Admin. A secondary bar below it offers more specific options like Homepage, Charts & Tables, Tasks, Messages, Calendar, and My Reports. The main content area is titled 'My Dashboard' and is divided into several sections: 'Personal Info' showing user details and contact information; 'Upcoming Class Days' with a table for class schedules; 'Upcoming Payments' with a table for payment orders; 'Financial Summary' showing credit and recent payments; 'Education Statistics' with a table for applicant counts; 'Evaluations' with a table for review counts; and 'My Tasks (View All)' showing a task to complete an assignment. A right-hand sidebar contains a search bar, quick links, help resources, recent reports, change history, notes, and recently visited items.

**union fusion**  
connect | communicate | collaborate

Logged on as Ed Burg  
Messages (0) | My Profile | Settings | Logout  
Viewing From: Default Association Root Org

Dashboard Documents Contacts Membership Events Education Financial Out-of-Work List Bids Organizing CMS Reporting Admin

Dashboard Homepage Charts & Tables Tasks Messages Calendar My Reports

### My Dashboard

**Personal Info**

Ed Burg  
No default address on record  
edb+default@datarg.com

Record Status: Active  
Organization: Default Association Root Org

Region:  
Job Classification:  
Person Status:  
Contact Groups:

**Upcoming Class Days**

Class	Where	Enrolled

**Upcoming Payments**

Order #	Amount	Due Before

[View all](#) | [Make a payment](#)

**Financial Summary**

Credit Balance: \$0.00  
Recent Payments:  
All Payments: \$0.00 (0)

**Evaluations**

Status	Count
Pending	0
Evaluatee Review	0
Staff Review	0

**Education Statistics**

Type	Count
Applicants	0
Apprentices	0
Journeymen	0

**My Tasks (View All)**

Summary	Due Date	Type	Completed	Regarding
Complete Assignment 2 Email me when completed	1/15/15			General Task

**Search** (hide sidebar)  
Quick Search  Go

**Quick Links** (add | manage)

**Help** (show tooltips)  
[Help with this page](#)  
[Help / Forums](#)  
[Submit a Request](#)

**Recent Reports** (show all)

**Change History**

Created: 1/13/2015 3:04:02 PM  
by Edward Burg  
Last Modified: 1/14/2015 9:22:59 AM  
by system User

**Notes** for Ed Burg (add | manage)

**Recently Visited**

## Homepage

In most instances the homepage is the same as the dashboard. The homepage for each user however can be set under the user's profile settings. The function of the homepage is to provide an alternate method for viewing the information that come up by default when the end user logs in. Technically, it could be any interface in the system.

The screenshot displays the Union Fusion user dashboard for Ed Burg. The interface includes a top navigation bar with links like Dashboard, Documents, and Contacts. A secondary bar shows the user's name and login status. The main content area is titled 'My Dashboard' and contains several sections: Personal Info (profile details), Upcoming Class Days (empty table), Upcoming Payments (empty table), Financial Summary (Credit Balance: \$0.00), Education Statistics (table with 0 counts), Evaluations (table with 0 counts), and My Tasks (one task: Complete Assignment 2). A right sidebar offers search, quick links, help, recent reports, change history, notes, and recently visited items.

**Personal Info**

Ed Burg  
No default address on record  
edb+default@datarg.com

Record Status: Active  
Organization: Default Association Root Org

Region:  
Job Classification:  
Person Status:  
Contact Groups:

**Upcoming Class Days**

Class	Where	Enrolled

**Upcoming Payments**

Order #	Amount	Due Before

[View all](#) | [Make a payment](#)

**Financial Summary**

Credit Balance: \$0.00  
Recent Payments:  
All Payments: \$0.00 (0)

**Evaluations**

Status	Count
Pending	0
Evaluatee Review	0
Staff Review	0

**Education Statistics**

Type	Count
Applicants	0
Apprentices	0
Journeymen	0

**My Tasks (View All)**

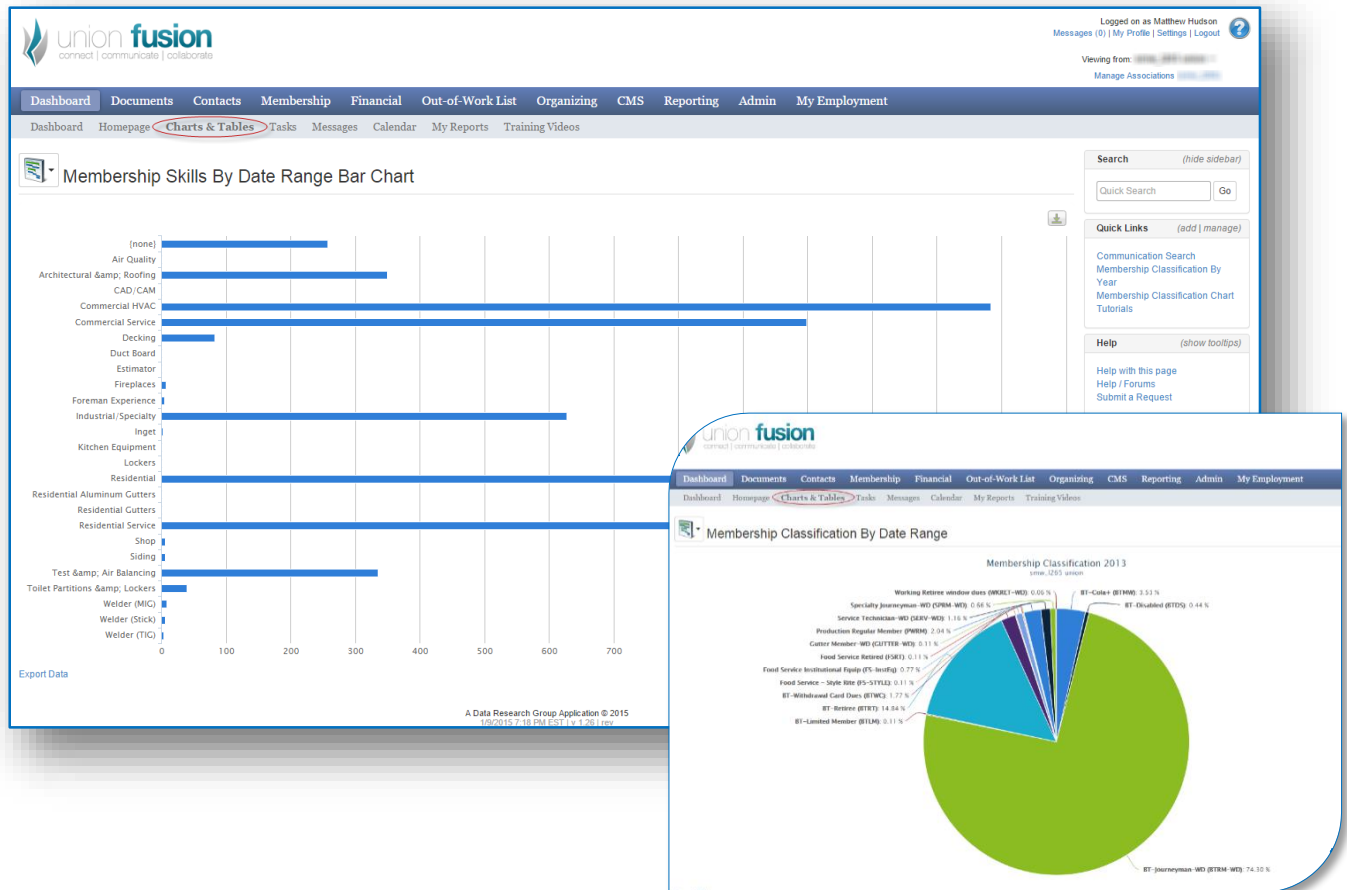
Summary	Due Date	Type	Completed	Regarding
Complete Assignment 2 Email me when completed	1/15/15			General Task

## Charts & Tables

The chart functionality is very similar to the Microsoft charting function typically associated with Microsoft Excel. The charting function is designed to operate in association with the embedded data classes that exist in Union Fusion.

There are a number of options, some of which are required that must be defined when the chart itself is created. As with other reporting objects that exist in UF, the chart can be private to the user or exposed as a tool to the entire organization. There are additional options that allow individual end users to declare the chart as part of their dashboard display.

Chart types include: bar charts, column charts and pie charts. Column and bar charts also allow for series display. Generally speaking charts will display more cleanly when the amount of data being displayed is limited in some capacity.



## Tasks

Tasks can be created in numerous locations throughout the solution. From an end user perspective, outgoing, incoming as well as draft can be viewed. As the name implies, a task is a simplified means of directing a job (or task) to a person or a group of end users in the system.

When tasks are created in the system, they allow end users to designate the recipients by way of an individual person or a group of persons (managed through contact groups). Each task going to each person(s) on the recipient list has an independent completion Boolean and date associated with the task to show completion back to the person who originated the task in the first place.

When tasks are created, there is an additional option to send a reminder email to the recipient(s).

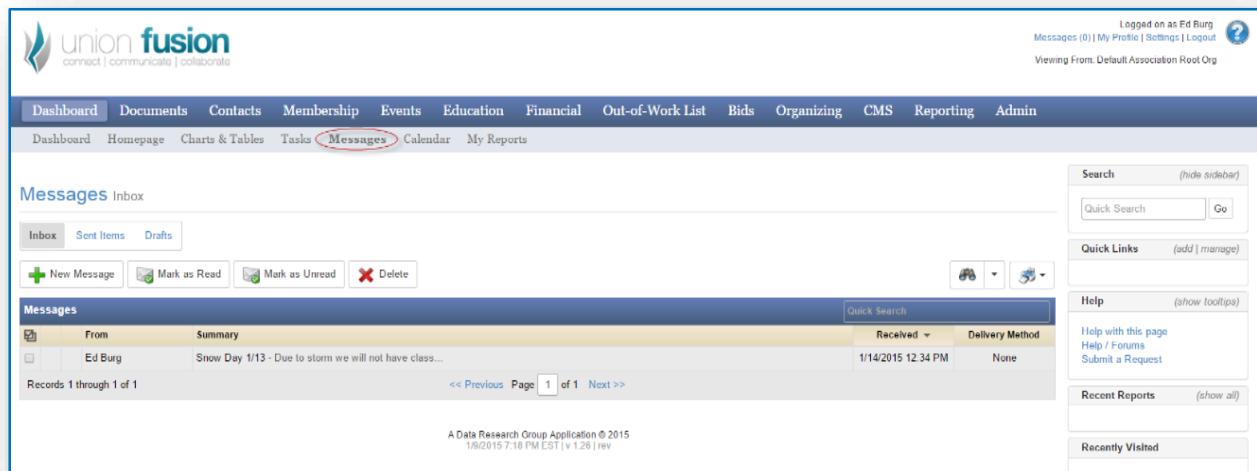
The screenshot displays the 'My Tasks' page in the Union Fusion application. The top navigation bar includes tabs for Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, and Admin. The 'Tasks' tab is selected. Below the navigation bar, the 'Tasks Inbox' section shows options to Create Task, Delete Task, Remind, and Complete. The task list table has the following data:

Name	Due Date	Regarding	From	To	Complete
Complete Assignment 2 Email me when completed	1/15/2015	General Task	Ed Burg	Edward F. Burg	

The page also includes a search bar, quick links, and a help section. The footer indicates the application is from A Data Research Group, version 1.26, dated 1/9/2015.

## Messages

Messages are very similar to tasks except they are considered a means of 'one-way' correspondence. There is no completion property associated with the message and like tasks, the end user initiating the task can send out an email to the recipient as an alternate means of communication.



The screenshot displays the Union Fusion web application interface. At the top, the logo "union fusion" is visible with the tagline "connect | communicate | collaborate". The user is logged in as "Ed Burg" and is viewing the "Messages" section. The navigation bar includes links for Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, and Admin. The "Messages" link is highlighted in the navigation bar. Below the navigation bar, the "Messages" section is titled "Messages Inbox". It features a search bar, a "Quick Search" button, and a "Go" button. The "Messages" table shows a single message from "Ed Burg" with the subject "Snow Day 1/13 - Due to storm we will not have class...". The message was received on "1/14/2015 12:34 PM" and has a "None" delivery method. The table also includes columns for "From", "Summary", "Received", and "Delivery Method". The interface includes a sidebar with "Quick Links", "Help", "Recent Reports", and "Recently Visited" sections. The footer indicates the application is from "A Data Research Group" and is dated "1/6/2015 7:16 PM EST | v 1.26 | rev".

union fusion  
connect | communicate | collaborate

Logged on as Ed Burg  
Messages (0) | My Profile | Settings | Logout  
Viewing From: Default Association Root Org

Dashboard Documents Contacts Membership Events Education Financial Out-of-Work List Bids Organizing CMS Reporting Admin

Dashboard Homepage Charts & Tables Tasks **Messages** Calendar My Reports

Messages Inbox

Inbox Sent Items Drafts

+ New Message Mark as Read Mark as Unread Delete

Messages

	From	Summary	Received	Delivery Method
<input type="checkbox"/>	Ed Burg	Snow Day 1/13 - Due to storm we will not have class...	1/14/2015 12:34 PM	None

Records 1 through 1 of 1

<< Previous Page 1 of 1 Next >>

A Data Research Group Application © 2015  
1/6/2015 7:16 PM EST | v 1.26 | rev

Search (hide sidebar)  
Quick Search Go

Quick Links (add | manage)

Help (show tooltips)  
I help with this page  
Help / Forums  
Submit a Request

Recent Reports (show all)

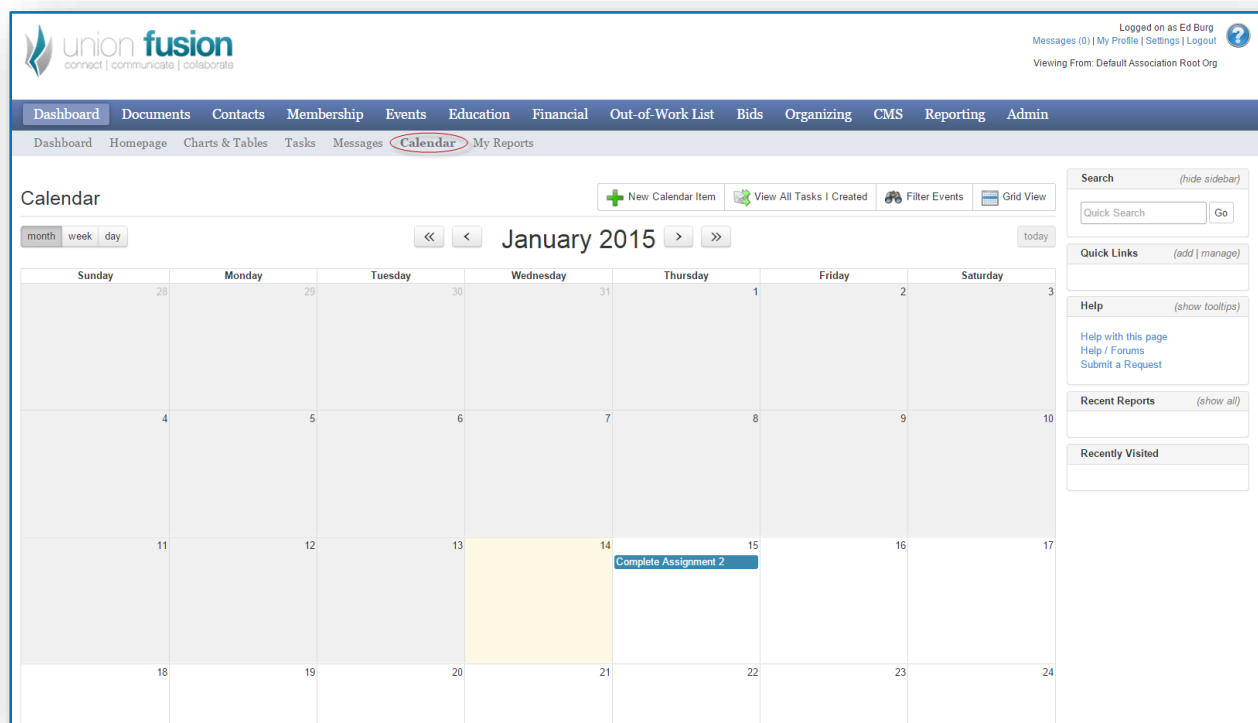
Recently Visited

## Calendar

As its name implies, the calendar object records all calendared items associated to the end user that is logged in.

These calendared items can occur by way of: classes, events, tasks, committee meetings, simple calendared items (meetings) and anything that associates the properties of an identified person and a scheduled date.

There is color legend to represent different types of scheduled items in the system. The information existing in the calendar is intended to be one way for display (read only). Although, the end user does have the ability to create what is called a simple calendared item from this display.



## DOCUMENTS

Data Research Group maintains its own document repository or document manager.

This module is capable of storing documents independently or connected to items in the system like people or companies.

Each document profile is capable of storing multiple versions of the same document so they a historical record can be maintained.

There is no document limit or storage limit in terms of the amount of space taken up.

The screenshot displays the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, Admin, and My Employment. The 'Documents' module is active, showing a 'File Explorer' view with a search bar and quick links. A table lists documents with columns for Name, Organization, Category, Size (KB), Created, Owner, Related To, Versions, Shared, Public, and Inactive. A red arrow points from the 'Presentation1.ppt' entry in the table to a detailed view of the document. The detailed view shows document metadata, a download link, and a versions table.

Name	Organization	Category	Size (KB)	Created	Owner	Related To	Versions	Shared	Public	Inactive
union fusion cms stuff	Default Association Root Org			8/5/2013						
Presentation1.ppt	Default Association Root Org		9	4/9/2013	Edward F. Burg		1		✓	

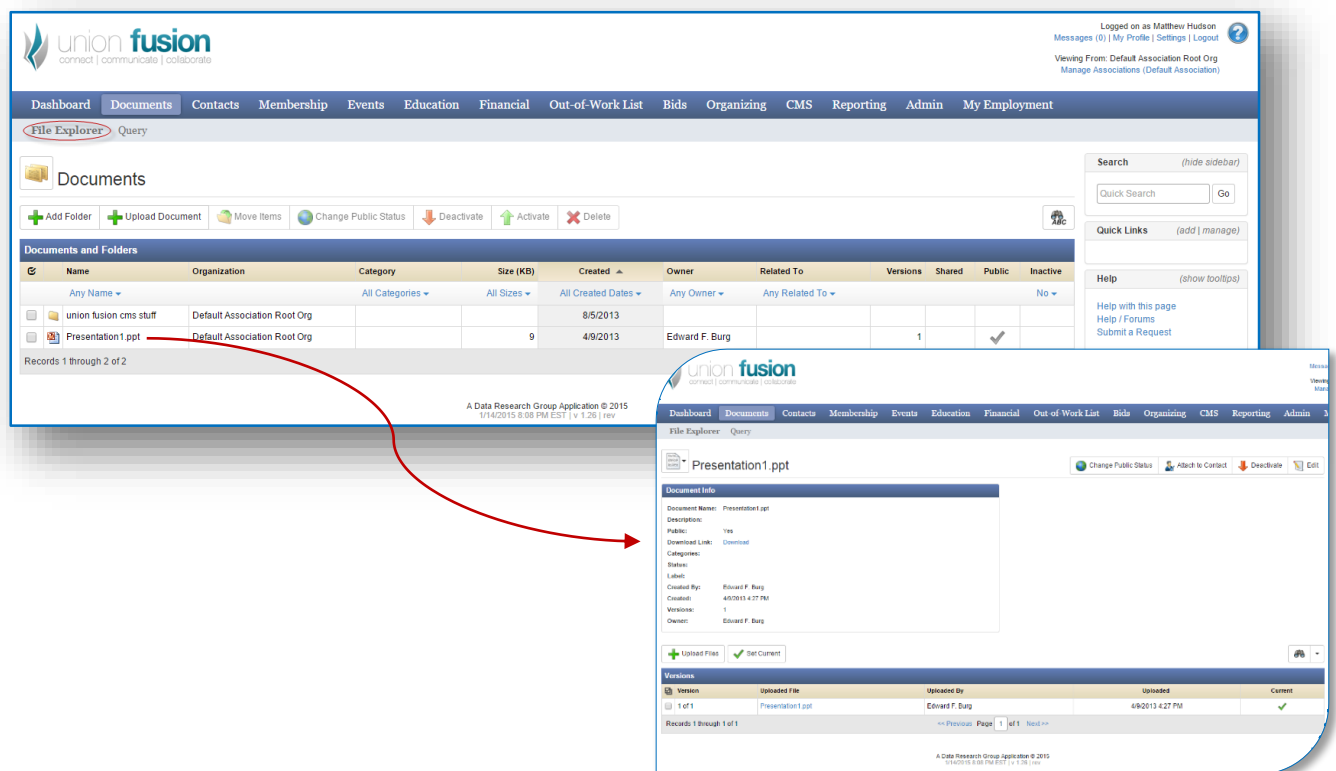
Document Info			
Document Name:	Presentation1.ppt		
Description:	Public		
Download Link:	<a href="#">Download</a>		
Categories:	Status:		
Labels:	Created By: Edward F. Burg		
Created:	4/9/2013 4:27 PM		
Versions:	1		
Owner:	Edward F. Burg		

Versions				
Version	Uploaded File	Uploaded By	Uploaded	Current
1 of 1	Presentation1.ppt	Edward F. Burg	4/9/2013 4:27 PM	✓

## File Explorer

The file explorer view allows end users to view documents in a similar capacity to the window file explorer. You can create folders and subfolders and store documents in any select folder where your permissions allow.



## Query

The query view for documents is a special view that flattens all of the files regardless of what folder or sub-folder they might exist in. This allows end users to conduct search across all file against file name description or some other characteristic.

The screenshot shows the Union Fusion web application interface. At the top, the logo "union fusion" is displayed with the tagline "connect | communicate | collaborate". The user is logged in as Matthew Hudson, with links for Messages (0), My Profile, Settings, and Logout. The current view is "Default Association Root Org" and "Manage Associations (Default Association)".

The navigation bar includes links for Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, Admin, and My Employment. The "Documents" link is highlighted, and a "Query" link is circled in the "File Explorer" section.

The main content area is titled "Document Query". It features a table with the following columns: Name, Folder, Size, Owner, Categories, Created, Shared, and Inactive. The table contains two records:

Name	Folder	Size	Owner	Categories	Created	Shared	Inactive
Presentation1.ppt		9 KB	Edward F. Burg		4/9/2013 4:27 PM		
query.cycle.all.js	union fusion cms stuff	52 KB	Brendon Foster		8/5/2013 5:34 PM		

Below the table, it indicates "Records 1 through 2 of 2" and provides navigation links: "<< Previous Page 1 of 1 Next >>".

On the right side of the interface, there is a "Search" section with a "Quick Search" input field and a "Go" button. Below this is a "Quick Links" section with a link to "add | manage". There is also a "Help" section with links for "Help with this page", "Help / Forums", and "Submit a Request". At the bottom right, there is a "Recent Reports" section with links for "Revenue Summar..." and "Revenue Summar...".

At the bottom of the page, it states "A Data Research Group Application © 2015" and "17/10/2015 8:08 PM EDT | v = 1.00 | rev".

## CONTACTS

The contacts module stores information on people and companies as well as some important related items. That will be discussed in detail below. It is important to remember that people can take on multiple roles and as such individual profiles for people can be seen in other parts of the solutions... for example students or members as well as others.

The screenshot displays the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, and Admin. The 'Contacts' module is selected, showing a sub-menu with 'People' and 'Companies'. The 'People' module is active, displaying a search form with fields for Search text, Region, Default address, Phone Number, Group, and Inactive. Below the search form is a table listing people, with columns for Name, Role, SSN, Company, Region, Status, Location, Phone, Email, Groups, and Inactive. The 'Companies' module is also shown, displaying a search form with fields for Search text, Group, Types, Taxing body, CBA signatory, States, Regions, Zip code, and Inactive. Below the search form is a table listing companies, with columns for Name, Role, Primary Contact, Region, Location, Phone, Email, Groups, and Inactive.

**People - default filter**

Search text:

Region:

Default address:

Phone Number:

Group:

Inactive:

Advanced search

Search Reset

Name	Role	SSN	Company	Region	Status	Location	Phone	Email	Groups	Inactive
Admin, DRG	User	123-12-3123								
B, Camille	User									
Balderson, Erik	User									
Burg, Ed	User									
Burg, Edward F.	User					Culpeper, VA				

**Companies - default filter**

Search text:

Group:

Types:

Taxing body:

CBA signatory:

States:

Regions:

Zip code:

Inactive:

Advanced search

Search Reset

Name	Role	Primary Contact	Region	Location	Phone	Email	Groups	Inactive
UF East	Organization							
AsstSecDr (AsstSecDr)	Contractor							
AsstSecDr (AsstSecDr)	Contract							
Default Association Root Org	Organization	Member: Example						

## People

This interface provides access to all people stored in the solution database, irrespective of the role or roles they may hold. There is filter capability built in to build custom or run saved filters against the existing data.

Records can be selected and dealt with in batch capacity by end users with the appropriate permission level. Selecting a record from the 'people' grid will take you to the person's profile and provide access to all items related to that person and the roles they serve in.

union fusion  
connect | communicate | collaborate

Logged on as Ed Burg  
Messages (0) | My Profile | Settings | Logout  
Viewing From: Default Association Root Org

Dashboard Documents **Contacts** Membership Events Education Financial Out-of-Work List Bids Organizing CMS Reporting Admin

People Companies Groups Committee Meetings Mailings Advanced Search Settings

People

+ Create Person Batch Add Notes Deactivate

People - default filter Quick Search

Search text:   
Region:   
Default address:   
Phone Number:   
Group:   
Inactive: No   
Advanced search  
Search Reset

	Name	Role	SSN	Company	Region	Status	Location	Phone	Email	Groups	Inactive
<input type="checkbox"/>	Admin, DRG	User	123-12-3123						admin@datarg.com		
<input type="checkbox"/>	B. Camille	User							camilleb@datarg.com		
<input type="checkbox"/>	Balderson, Erik	User							erikb@datarg.com		
<input type="checkbox"/>	Burg, Ed	User							edb-default@datarg.com		
<input type="checkbox"/>	Burg, Edward F.	User					Culpeper, VA	(540) 497-3387	edb@datarg.com		

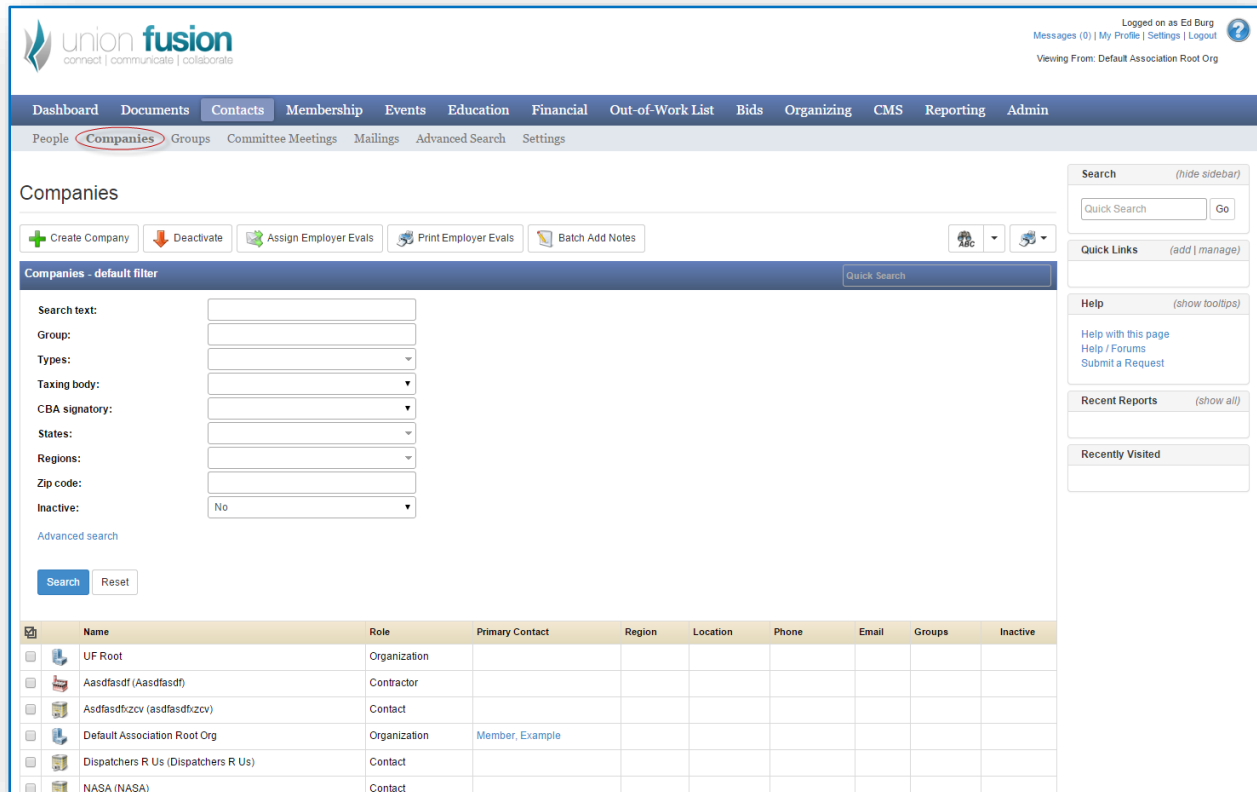
Search (hide sidebar)  
Quick Search  Go  
Quick Links (add | manage)  
Help (show tooltips)  
Help with this page  
Help / Forums  
Submit a Request  
Recent Reports (show all)  
Recently Visited

## Companies

This interface provides access to all companies stored in the solution database, irrespective of the role or roles they may hold. There is filter capability built in to build custom or run saved filters against the existing data.

Records can be selected and dealt with in batch capacity by end users with the appropriate permission level. Selecting a record from the 'company' grid will take you to the company's profile and provide access to all items related to that person and the roles they serve in.

Due to their nature, selected companies will also reveal access to the people working for that company currently.



The screenshot displays the 'Companies' management interface in the Union Fusion system. The top navigation bar includes links for Dashboard, Documents, **Companies**, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, and Admin. Below this, a sub-navigation bar shows People, **Companies**, Groups, Committee Meetings, Mailings, Advanced Search, and Settings.

The main content area is titled 'Companies' and features several action buttons: Create Company, Deactivate, Assign Employer Evals, Print Employer Evals, and Batch Add Notes. A 'Companies - default filter' section provides search criteria for Name, Group, Types, Taxing body, CBA signatory, States, Regions, Zip code, and Inactive. An 'Advanced search' section with Search and Reset buttons is also present.

On the right sidebar, there is a Search section (hide sidebar), Quick Search, Quick Links (add | manage), Help (show tooltips) with links to 'Help with this page', 'Help / Forums', and 'Submit a Request', Recent Reports (show all), and Recently Visited.

The main table lists the following companies:

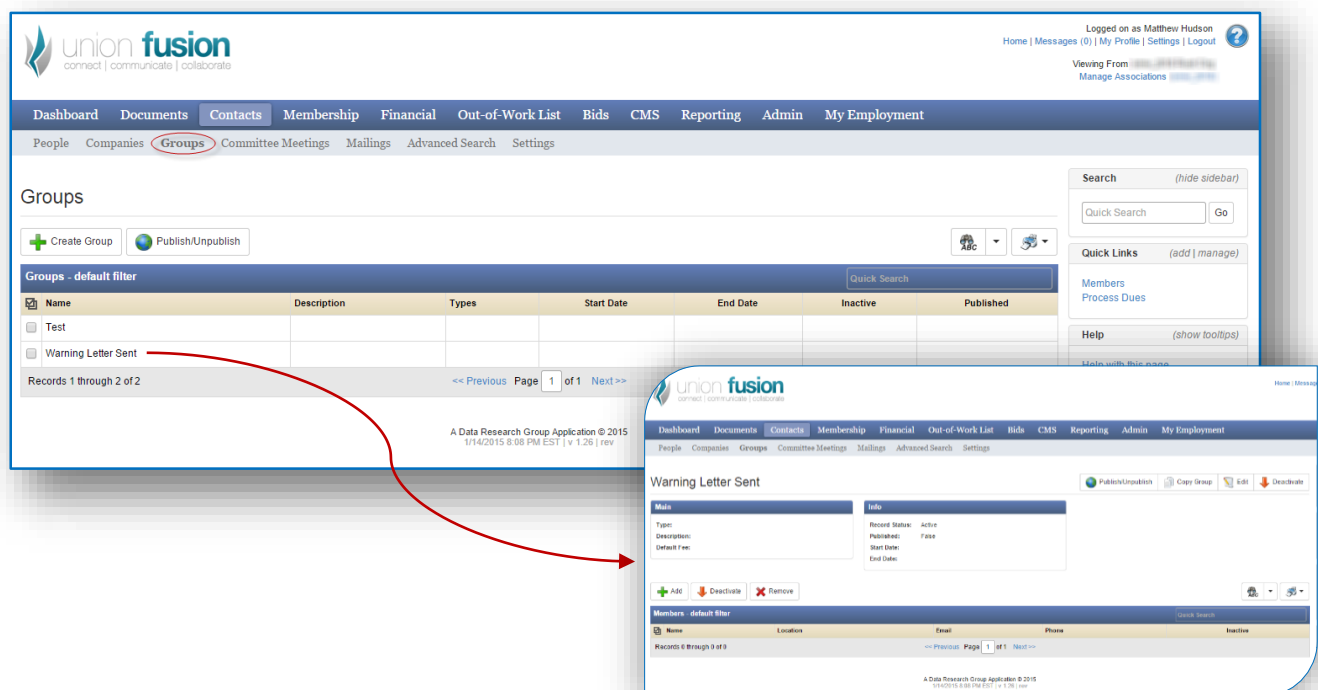
Name	Role	Primary Contact	Region	Location	Phone	Email	Groups	Inactive
UF Root	Organization							
Aasdfasdf (Aasdfasdf)	Contractor							
Asdfasdfzcv (asdfasdfzcv)	Contact							
Default Association Root Org	Organization	Member, Example						
Dispatchers R Us (Dispatchers R Us)	Contact							
NASA (NASA)	Contact							

## Groups

A contact group is an object that provides end users with the ability to form an arbitrary group of people or companies. There is no system defined purpose for the group except in the way that the org may use that group.

Typical applications for group use include communication or executing a function against more than one person at a time.

There are numerous functions in the system that can leverage the group concept such that the function can be applied to multiple individuals at the same time.



## Committee Meetings

The committee meeting is an arbitrary meeting that allows administrators to call the meeting and invite multiple people. The meeting can serve whatever purpose is intended by the organization. In schools for example, administrators can schedule students that require disciplinary actions. There are numerous applications for the use of committee meetings only limited by creativity.

Committee meetings will show on calendars to participants and have options for communication and reporting.

The screenshot displays the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Education, Financial, Out-of-Work List, Welding, CMS, Reporting, Admin, and My Employment. The 'Committee Meetings' link is highlighted in the navigation bar. The main content area shows a list of committee meetings with columns for Title and Date. The list includes meetings from April 2014 to November 2014. A sidebar on the right contains a search bar, quick links, help, recent reports, and recently visited items. The footer indicates the application is from A Data Research Group, dated 1/14/2015.

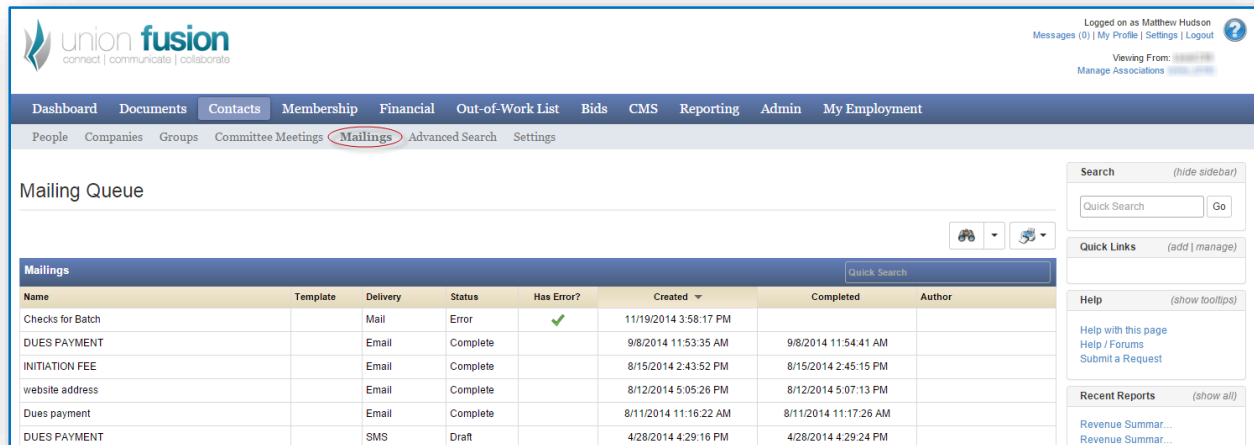
Title	Date
April 2014 Union Meeting	4/1/2014
March Union Meeting	3/4/2014
May 2014 Union Meeting	5/6/2014
June 2014 Union Meeting	6/3/2014
October 2014 Union Meeting	10/7/2014
November 2014 Union Meeting	11/4/2014

## Mailings

Mailings are a special object used to capture generated reports that have yet to be printed. A mailing is a simple way UF uses to capture multiple reports into a single object.

A sample mailing could be a batch of checks that require printing or a set of benefit applications to will be mailed to benefit recipients.

Mailings are system generated and be archived and retrieved at a later point in time. Each mailing represents a collection of reports that are typically the same report, but can be different.



The screenshot shows the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Financial, Out-of-Work List, Bids, CMS, Reporting, Admin, and My Employment. The 'Mailings' link is highlighted. Below the navigation bar, the 'Mailing Queue' section is visible. It contains a table with columns: Name, Template, Delivery, Status, Has Error?, Created, Completed, and Author. The table lists several mailings, including 'Checks for Batch', 'DUES PAYMENT', 'INITIATION FEE', 'website address', 'Dues payment', and 'DUES PAYMENT'. The 'Status' column shows 'Error' for 'Checks for Batch' and 'Complete' for others. The 'Has Error?' column has a green checkmark for 'Checks for Batch'. The 'Created' and 'Completed' columns show timestamps. On the right side of the interface, there is a search bar, quick links, and a help section.

Name	Template	Delivery	Status	Has Error?	Created	Completed	Author
Checks for Batch		Mail	Error	✓	11/19/2014 3:58:17 PM		
DUES PAYMENT		Email	Complete		9/8/2014 11:53:35 AM	9/8/2014 11:54:41 AM	
INITIATION FEE		Email	Complete		8/15/2014 2:43:52 PM	8/15/2014 2:45:15 PM	
website address		Email	Complete		8/12/2014 5:05:26 PM	8/12/2014 5:07:13 PM	
Dues payment		Email	Complete		8/11/2014 11:16:22 AM	8/11/2014 11:17:26 AM	
DUES PAYMENT		SMS	Draft		4/28/2014 4:29:16 PM	4/28/2014 4:29:24 PM	

## Advanced Search

The advanced search under the contacts module is a special interface that provides direct access to filter down on a very common set of fields (properties). It follows a filter-by-form format that is very easy to understand and naturally intuitive to most end users.

**union fusion**  
connect | communicate | collaborate

Dashboard Documents **Contacts** Membership Financial Out-of-Work List Bids C  
People Companies Groups Committee Meetings Mailings **Advanced Search** Settings

### Advanced Search

**Search For**

- ☒ Search on companies
- ☐ Search on people
- ☐ Search on people within companies

**Advanced Search**

Company properties:

Type:

Include groups:

Exclude groups:

Record status:

City:

County:

Zip:

State:

Area code:

Created between:  and

Modified between:  and

Industry codes:

Preferred communication method:

## Settings

Settings' menus are common on many of the main modules and serve the function of providing configuration options to that particular module.

The settings will vary depending upon the module they are supporting. A solid understanding of these configuration settings are gained through training with knowledgeable personnel.

The screenshot displays the Union Fusion web application interface. The top navigation bar includes the Union Fusion logo and a user profile section indicating the user is logged in as Matthew Hudson. Below the navigation bar, a secondary menu lists various modules: Dashboard, Documents, Contacts, Membership, Financial, Out-of-Work List, Bids, CMS, Reporting, Admin, and My Employment. The 'Settings' link under the 'Contacts' module is highlighted with a red circle. The main content area is titled 'Settings' and contains a 'Contacts Settings' section. This section includes a 'Statuses' subsection with a checked checkbox for 'Do not require veteran status'. Below this is a 'Security Groups' subsection with three dropdown menus: 'Default company admin group' (set to Admin), 'Default coordinator group' (set to Business Agent Group), and 'Online verification group' (set to Member). At the bottom of this section are 'Save Settings' and 'Cancel' buttons. On the right side of the page, there is a sidebar with sections for 'Search' (with a quick search box), 'Quick Links' (with an add/manage link), 'Help' (with links to help pages and a request submission link), 'Recent Reports' (showing revenue summaries), and 'Recently Visited' (listing recent user activity).

## MEMBERSHIP

The membership module provides access to the central pieces associated with the concept of membership. These would include: members, memberships and related classifications, enrollments, assessments and related configuration settings.

While the number of menu items is small, there is a tremendous amount of functionality integrated with these 2<sup>nd</sup> level menu items that are all part of membership. Because of the nature of membership, there is also a heavy financial integration piece that should be considered/understood when using this particular module.

Finally, the configuration settings that are a part of membership are substantial due to the numerous different ways union organization capture and record dues.

The screenshot displays the Union Fusion web application interface. At the top, the logo 'union fusion' is visible with the tagline 'connect | communicate | collaborate'. The user is logged in as Matthew Hudson, with links for Messages (0), My Profile, Settings, and Logout. The current view is 'Default Association Root Org' with a link to 'Manage Associations (Default Association)'. The main navigation bar includes Dashboard, Documents, Contacts, Membership (highlighted), Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, Admin, and My Employment. Below this, a sub-menu shows Members (circled), Memberships, Assessments, and Settings. The 'Members' section is active, showing a list of members with columns for Name, IA #, Region, Membership, Classification, Start Date, End Date, Status, Inactive, and Expired. Three members are listed: Foster, Brendon; Member, Example; and Test, TEst. The interface also includes buttons for 'Enroll New Member', 'Deactivate', 'Batch Add Notes', 'Batch Edit Selected', and 'Batch Edit All'. A search bar and quick links are on the right. The footer indicates 'A Data Research Group Application © 2015' and the date '11/14/2015 5:08 PM EST | v. 1.26 | rev'.

Name	IA #	Region	Membership	Classification	Start Date	End Date	Status	Inactive	Expired
Foster, Brendon			Test Membership	Lifetime Member	2/1/2014	2/28/2014			✓
Member, Example	IA314159		Test Membership	Lifetime Member	2/1/2014	1/31/2014			✓
Test, TEst			Test Membership	Lifetime Member	9/1/2014	9/30/2014			✓

## Members

The members grid provides a filterable list for queries and reporting specifically to people that, are currently... or have in the past, been a member. A member is defined as anyone who has had or does have an active enrollment.

To the local union, the member's grid and related features and functions serve as the primary data class for activity. As such, gaining familiarity with this grid and the member profile is of primary importance to new organizations using the Union Fusion web solution.

For local union office, the member list is perhaps the most queried list in the entire solution as it connects many of the important pieces together.

The screenshot displays the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, Admin, and My Employment. The 'Members' link is highlighted in the sub-navigation bar. Below the navigation bar, the 'Members' section features a search bar, a 'Quick Search' button, and a 'Go' button. A table titled 'Members - default filter' lists members with columns for Name, IA #, Region, Membership, Classification, Start Date, End Date, Status, Inactive, and Expired. The table shows three records: Foster, Brendon; Member, Example; and Test, TEst. A red arrow points from the 'Foster, Brendon' row to a detailed member profile for 'Brendon Foster'. The profile includes sections for Personal Info, Financial Summary, Membership Activity, and Member Info. The Financial Summary shows a Credit Balance of \$0.00 and a Recent Payment of \$15.00. The Membership Activity shows a Start Date of 2/1/2014 and an End Date of 2/28/2014. The Member Info section shows a Status of Active and a Membership Type of Test Membership.

Name	IA #	Region	Membership	Classification	Start Date	End Date	Status	Inactive	Expired
Foster, Brendon			Test Membership	Lifetime Member	2/1/2014	2/28/2014			✓
Member, Example	IA314159		Test Membership	Lifetime Member	2/1/2014	1/31/2014			✓
Test, TEst			Test Membership	Lifetime Member	9/1/2014	9/30/2014			✓

Records 1 through 3 of 3

<< Previous Page 1 of 1 Next >>

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1/14/2015 6:08 PM EST | v 1.20 | rev

**Brendon Foster** Member Profile

**Personal Info**

Previous Photo: No default picture on record  
Email: bender@unionfusion.com  
Recent Status: Active  
Organization: United Association  
Region: IA  
Classification: Lifetime Member  
Contact Group: Contact Group

**Financial Summary**

Credit Balance: \$0.00 (active)  
Recent Payment: \$15.00 (2/28/2015)  
All Payments: \$15.00 (2/28/2015)  
All Payments: \$15.00 (2/28/2015)

**Membership Activity**

Initiation Date: 2/1/2014  
Initiation Fee: \$0.00  
Initiation Paid In Date: \$0.00  
Initiation Payment (Monthly): \$0.00  
Renewal Date: 2/28/2014  
Renewal Fee: \$0.00  
Expired: 2/28/2014  
Withdrawn: 2/28/2014  
Renewal Date: 2/28/2014  
Renewal Fee: \$0.00  
Renewal Paid In Date: \$0.00  
Renewal Payment (Monthly): \$0.00

**Member Info**

Status: Active  
In Number: 1  
Membership: Test Membership  
Classification: Lifetime Member  
Member Type: Assessment Class  
Assessment Class: 2/28/2014  
Initiation: 2/1/2014  
Initiation Fee: \$0.00  
Initiation Paid In Date: \$0.00  
Initiation Payment (Monthly): \$0.00  
Renewal Date: 2/28/2014  
Renewal Fee: \$0.00  
Renewal Paid In Date: \$0.00  
Renewal Payment (Monthly): \$0.00

**Active Locations**

Membership: Test Membership  
Classification: Lifetime Member  
Status: Active

## Memberships

Memberships are a broad way that Union Fusion classifies the ability that a person has to connect with a local union. When a person enrolls with a Local union office, they do not actually get a membership, but rather a membership classification.

There can be multiple classifications associated with each membership. This gives the local union the ability to price each membership classification out differently.

When a member enrolls in a particular membership classification, the money received for dues under that classification can be split into multiple accounts.

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Logged on as Matthew Hudson  
Messages (0) | My Profile | Settings | Logout  
Viewing From: Default Association Root Org  
Manage Associations (Default Association)

Dashboard Documents Contacts **Membership** Events Education Financial Out-of-Work List Bids Organizing CMS Reporting Admin My Employment

Members **Memberships** Assessments Settings

### Memberships

[+ New Membership](#)

Name	Duration	Classifications	Published	Inactive
Default Membership	Monthly			
Test Membership	Monthly	Lifetime Member		

Records 1 through 2 of 2

<< Previous Page 1 of 1 Next >>

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1/14/2015 8:08 PM EST | v 1.26 | rev

**Search** (hide sidebar)  
Quick Search  Go

**Quick Links** (add | manage)


**Help** (show tooltips)  
Help with this page  
Help / Forums  
Submit a Request

**Recent Reports** (show all)  
Revenue Summar...  
Revenue Summar...

**Recently Visited**  
Matthew Hudson  
Default Association Root Org  
Brad Foster  
test Root Org  
Start Test and Balance

## Assessments

Working dues and assessments provide a means for local unions to assess dues on the basis of hours worked as opposed to a static amount associated with the membership classification. The working dues can be calculated as a result to generate an invoice on the basis of the multiplier for a particular job classification.



connect | communicate | collaborate

Logged on as Matthew Hudson  
[Home](#) | [Messages \(0\)](#) | [My Profile](#) | [Settings](#) | [Logout](#)

Viewing From: [All Associations](#) | [Manage Associations](#)

[Dashboard](#) | [Documents](#) | [Contacts](#) | [Membership](#) | [Financial](#) | [Out-of-Work List](#) | [Bids](#) | [CMS](#) | [Reporting](#) | [Admin](#) | [My Employment](#)

[Members](#) | [Memberships](#) | [Assessments](#) | [Settings](#)

### Assessments

Member	Created	Assessed Amt.	Invoiced Amt.	Balance Adj.
<a href="#">Member - [Name]</a>	1/15/2015	\$0.00	\$132.67	(\$132.67)
<a href="#">Member - [Name]</a>	1/15/2015	\$0.00	\$153.22	(\$153.22)
<a href="#">Member - [Name]</a>	1/15/2015	\$0.00	\$84.05	(\$84.05)
<a href="#">Member - [Name]</a>	1/15/2015	\$0.00	\$162.19	(\$162.19)
<a href="#">Member - [Name]</a>	1/15/2015	\$0.00	\$209.73	(\$209.73)
<a href="#">Member - [Name]</a>	1/15/2015	\$0.00	\$136.37	(\$136.37)
<a href="#">Member - [Name]</a>	1/15/2015	\$0.00	\$145.43	(\$145.43)
<a href="#">Member - [Name]</a>	1/15/2015	\$0.00	\$150.38	(\$150.38)
<a href="#">Member - [Name]</a>	1/15/2015	\$0.00	\$140.08	(\$140.08)

Search (hide sidebar)  
Quick Search  Go

Quick Links (add | manage)  
[Members](#)  
[Process Dues](#)

Help (show tooltips)  
[Help with this page](#)  
[Help / Forums](#)  
[Submit a Request](#)

Recent Reports (show all)  
[Revenue Summar...](#)  
[Revenue Summar...](#)

## Settings

The settings area provides a unique set of configuration options associated with the membership module that define a large number of possibilities. Under most circumstances, administrators will want to protect the settings associated with this module so that standard end users cannot access or alter the information stored here.

There can be repercussions associated with dollar amount allocations into various accounts when dues are paid for a member on a monthly basis. Additionally, once the system has been setup, it may be wise for administrative staff to consult with Data Research Group employees prior to making changes to this particular 2<sup>nd</sup> level menu item.

The screenshot displays the 'Settings' page within the Union Fusion application. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership (highlighted), Financial, Out-of-Work List, Bids, CMS, Reporting, Admin, and My Employment. Below this, a sub-navigation bar shows Members, Memberships, Assessments, and Settings (circled in red). The main content area is titled 'Settings' and contains a 'Membership Settings' section. This section is divided into several categories: Security (Default member group: Member), Receipts (Initiation fees, Assessment, Fines, Reinstatement fees, Financial secretary, Local number), Funds (Political fund, Funeral fund, Benevolent fund), and Miscellaneous (Print payment memo on dues stub). At the bottom of the settings section are 'Save Settings' and 'Cancel' buttons. On the right side of the page, there is a sidebar with a search bar, quick links (Members, Process Dues), help links, recent reports (Revenue Summar...), change history (Created: 9/4/2014 10:40:19 AM, Last Modified: 1/15/2015 3:46:25 PM by Janis Richardson), and recently visited items (SMART Local 265, Matthew Hudson, Default Association Root Org, Brad Foster, Test Root Org).

## EVENTS

While the 'events' module does not contain related 2<sup>nd</sup> level menus, there are nonetheless a number of related items to a single event that end users should be familiar with. These include: sub-events, tickets and registrations.

Sub-events are a simply a way to divide events up further. Often times, conferences have multiple sessions that are held even sometimes simultaneously to appeal to the member audience. Each session can be listed as a sub-event in union fusion. Sub-events are optional.

Tickets are a way to group one or more subevents together and sell to a potential customer at a particular rate. Tickets also contain date ranges that allow organization to offer early bird specials on tickets if they purchase prior to a specific date.

Registrations are the culmination of selling one or more tickets to one or more members. The events module is both very simplistic and in some ways complex based primarily on the needs of the local union office. All events have what are referred as lite pages that integrate with the local union website for a more natural check out process to the member. They integrate card services and financials as well.

The screenshot displays the Union Fusion web application interface. At the top, the Union Fusion logo is on the left, and user information (Logged on as Matthew Hudson) and navigation links (Messages, My Profile, Settings, Logout) are on the right. A horizontal menu bar contains various sections: Dashboard, Documents, Contacts, Membership, Events (selected), Education, Financial, CMS, Reporting, Admin, My Transactions, My Membership, and My Employment.

The main content area is titled 'Business Applications of Statistics and Data Anal...'. It features several panels:

- Event Info:** Name: Business Applications of Statistics and Data Analytics (December 2014/Washington, DC), Event Code: 33183000, Event Dates: 12/7/2014 - 12/9/2014, Facilitator: Johns Hopkins University, Washington Campus, Address: 3515 Massachusetts Avenue, NW, Washington, DC 20007, Speakers: None.
- Status:** Status: Published, Capacity: 30, Days to Event: N/A, Categories: nabe.m3ams.com/LiteEvent/Register?eventid=33183000, Registration Url: eventid=33183000.
- Upcoming Sub Events:** A table with columns for Name and Time.
- Attendees - default filter:** A table listing registered attendees.

The Attendees table has columns: Attendee, Company, Ticket, Price, and Registered. It lists four attendees from National Federation of Independent Business, HSBC, Overseas Private Investment Corp, and Dept. of Workforce Services.

On the right sidebar, there is a Search bar, Quick Links (Adam Morehouse, Groups), Help section (Help with this page, Help / Forums, Submit a Request), Recent Reports, and Change History (Created: 9/17/2014 1:47:53 PM by Tom Morehouse).

## EDUCATION

While the education module for construction trades and local unions is its own module, it is perhaps the most complex in terms of its capabilities and built in functionality.

There are a number of 2<sup>nd</sup> level menus as well as 3<sup>rd</sup> level menus that stem from the use of education. In this white paper here, we will only discuss functionality down as far as the 2<sup>nd</sup> level options.

These options include: Students, applicants, instructors, classes, courses, test questions, evaluations and settings.

It should be noted that although it is not a menu item at the first or second level, our education module also supports costs and financial integration as well as the concept of upgrades associated with many construction trades.

The screenshot displays the Union Fusion web application interface. At the top, the logo "union fusion" is visible with the tagline "connect | communicate | collaborate". The user is logged in as Matthew Hudson, with links for Home, Messages (0), My Profile, Settings, and Logout. The navigation bar includes Dashboard, Documents, Contacts, Education (selected), CMS, Reporting, Admin, and My Employment. Below the navigation bar, the "Students" menu item is highlighted. The main content area shows the "Students" page with a search bar, a "Quick Search" button, and a list of students. The list has columns for Name, Organization, Region, Status, Accepted, Indentured, Year, Type, Wage Level, Phone, Journeyman, Employer, and Inactive. The students listed are B. Camille, Bender, Tin, Brown, John, Burg, Christopher "Chris" Paul, Burg, Ed (test org) (test org), Culator, Cal, Example, Chris, Fish, Jelly, Foster, Brad, and Foster, Caleb. The right sidebar contains a "Search" section, "Quick Links" (add | manage), "ITI Windows Reader", "Help" (show tooltips), "Recent Reports" (show all), and "Recently Visited" (David M Supergan, Matthew Hudson, Edward F. Burg III, International Training Institute, John Smith).

Name	Organization	Region	Status	Accepted	Indentured	Year	Type	Wage Level	Phone	Journeyman	Employer	Inactive
B. Camille	Test Organization			3/7/2013			BT Service	\$25.00 (60.00 %)	(540) 827-7541		Camille'S Test Company	
Bender, Tin	Test Organization			9/19/2013		1st year	Applicant	Applicant - \$0.00 (5.00 %)	(123) 456-7890			
Brown, John	Test Organization			8/6/2013			BT Service	\$23.20 (50.00 %)				
Burg, Christopher "Chris" Paul	Test Organization			4/29/2011	5/31/2011		BT Service	\$23.20 (50.00 %)	(540) 497-3387		ACCO	
Burg, Ed (test org) (test org)	Test Organization			10/25/2011		5	BT Service	\$25.00 (60.00 %)	(540) 718-9121		Camille'S Test Company	
Culator, Cal	Test Organization			3/13/2012			Staff	N/A - \$0.00 (0.00 %)	(540) 395-3538		Test Organization	
Example, Chris	Test Organization			4/9/2014			Applicant	Applicant - \$0.00 (5.00 %)			Data Research Group	
Fish, Jelly	Test Organization			3/1/2013			Building Trade Sheet Metal	period 3 - \$18.00 (60.00 %)				
Foster, Brad	Test Organization			3/22/2013					(540) 692-9114			
Foster, Caleb	Test Organization			12/28/2012			Applicant	Applicant - \$0.00 (5.00 %)	(571) 350-8474			

## Students

Within the education module, the student's grid and related profile is perhaps the most important. The vast majority of information collected within the system is related to, in some capacity or another, students. The student grid is filterable by way of a large number of fields. Custom filters can be created and saved for future use. The student grid also contains numerous related reports that can be generated and then printed on the basis of selected students.

union fusion  
connect | communicate | collaborate

Logged on as Matthew Hudson  
Home | Messages (0) | My Profile | Settings | Logout

Vewing From: [dropdown]  
Manage Associations [button]

---

Dashboard Documents Contacts **Education** CMS Reporting Admin My Employment

**Students** Applicants Instructors Classes Courses Test Questions Evaluations Settings

## Students

+ Create Student
+ Deactivate
+ Batch Add Notes
+ Batch Edit
+ Evaluations

Name	Organization	Region	Status	Accepted	Indentured	Year	Type	Wage Level	Phone	Journeyman	Employer	Inactive
B, Camille	Test Organization			3/7/2013			BT Service	\$25.00 (60.00 %)	(540) 827-7541		Camille's Test Company	
Bender, Tim	Test Organization			9/19/2013		1st year	Applicant	Applicant - \$0.00 (5.00 %)	(123) 456-7890			
Brown, John	Test Organization			8/6/2013			BT Service	\$23.20 (50.00 %)				
Burg, Christopher "Chris" Paul	Test Organization			4/29/2011	5/31/2011		BT Service	\$23.20 (50.00 %)	(540) 497-3387		ACCO	
Burg, Ed (test org) (test org)	Test Organization			10/25/2011		5	BT Service	\$25.00 (60.00 %)	(540) 718-9121		Camille's Test Company	
Culator, Cal	Test Organization			3/13/2012			Staff	N/A - \$0.00 (0.00 %)	(540) 395-3538		Test Organization	
Example, Chris	Test Organization			4/9/2014			Applicant	Applicant - \$0.00 (5.00 %)			Data Research Group	
Fish, Jelly	Test Organization			3/1/2013			Building Trade Sheet Metal	period 3 - \$18.00 (60.00 %)				
Foster, Brad	Test Organization			3/22/2013					(540) 692-9114			
Foster, Caleb	Test Organization			12/28/2012			Applicant					

**Search** (hide sidebar)

 Go

**Quick Links** (add | manage)

ITI Windows Reader

**Help** (show tooltips)

Help with this page  
[Help / Forums](#)  
[Submit a Request](#)

**Recent Reports** (show all)

Email Addresses (for 4 records)  
[Students Class Schedules \(for ...\)](#)  
[Students Class Schedules \(for ...\)](#)  
[Students Class Schedules \(for ...\)](#)

**Recently Visited**

David M Supergan  
Matthew Hudson  
Edward F. Burg III  
International Training Institute  
John Smith

union fusion  
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Logged on as Matthew Hudson  
Home | Messages (0) | My Profile | Settings | Logout

Vewing From: [dropdown]  
Manage Associations [button]

---

Dashboard Documents Contacts **Education** CMS Reporting Admin My Employment

**Students** Applicants Instructors Classes Courses Test Questions Evaluations Settings

## Student Profile

+ Create Student
+ Deactivate

Name	Organization	Region	Status	Accepted	Indentured	Year	Type	Wage Level	Phone	Journeyman	Employer	Inactive
B, Camille	Test Organization			3/7/2013			BT Service	\$25.00 (60.00 %)	(540) 827-7541		Camille's Test Company	
Bender, Tim	Test Organization			9/19/2013		1st year	Applicant	Applicant - \$0.00 (5.00 %)	(123) 456-7890			
Brown, John	Test Organization			8/6/2013			BT Service	\$23.20 (50.00 %)				
Burg, Christopher "Chris" Paul	Test Organization			4/29/2011	5/31/2011		BT Service	\$23.20 (50.00 %)	(540) 497-3387		ACCO	
Burg, Ed (test org) (test org)	Test Organization			10/25/2011		5	BT Service	\$25.00 (60.00 %)	(540) 718-9121		Camille's Test Company	
Culator, Cal	Test Organization			3/13/2012			Staff	N/A - \$0.00 (0.00 %)	(540) 395-3538		Test Organization	
Example, Chris	Test Organization			4/9/2014			Applicant	Applicant - \$0.00 (5.00 %)			Data Research Group	
Fish, Jelly	Test Organization			3/1/2013			Building Trade Sheet Metal	period 3 - \$18.00 (60.00 %)				
Foster, Brad	Test Organization			3/22/2013					(540) 692-9114			
Foster, Caleb	Test Organization			12/28/2012			Applicant					

**Search** (hide sidebar)

 Go

**Quick Links** (add | manage)

ITI Windows Reader

**Help** (show tooltips)

Help with this page  
[Help / Forums](#)  
[Submit a Request](#)

**Recent Reports** (show all)

Email Addresses (for 4 records)  
[Students Class Schedules \(for ...\)](#)  
[Students Class Schedules \(for ...\)](#)  
[Students Class Schedules \(for ...\)](#)

**Recently Visited**

David M Supergan  
Matthew Hudson  
Edward F. Burg III  
International Training Institute  
John Smith

union fusion

## Applicants

Applicants are similar to students in the UF framework, except that they have not been approved or accepted into the program. As such, they are maintained in a separate list. The UF framework will still allow end users to relate numerous items to the applicant's profile in keeping with normal the normal practice of training centers.

When information is related to the applicant, it will remain historically. Individuals who are applicants simply inherit a new role when they transition to a student position.

Applicants can have multiple related applications exist against their record for evaluation as they seek to enter the program.

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Home | Messages (0) | My Profile | Settings | Logout  
Viewing From: [dropdown] Manage Associations [dropdown]

Dashboard Documents Contacts **Education** CMS Reporting Admin My Employment

Students **Applicants** Instructors Classes Courses Test Questions Evaluations Settings

### Applicants

[Create Applicant](#) [Batch Edit](#) [Deactivate](#) [Rank Applicants](#) [Delete Rankings](#) [Batch Add Notes](#)

**Applicants - default filter** [Quick Search](#)

Rank	Name	Apprentice ID	Organization	Region	Applied	Applicant Status	Apprentice Type	Last Application Score	Employer	Employer Start Date	Inactive
1	Man, Joe "JR" Tin	A69272790	Test Organization		8/3/2011		BT Service				
2	Tinbender, Jane	A19429067	Test Organization		8/3/2011		Building Trade Sheet Metal				
3	Cooper, Nathan		Test Organization				Applicant				
4	Test, Test	A37259315	Test Organization		10/19/2012		Applicant				
5	Test, Test		Test Organization		10/19/2012		Applicant	0.00			
6	Test, Test		Test Organization		11/1/2012		Applicant				
7	Stestests, Test		Test Organization		11/8/2012		Applicant				
8	F, K		Test Organization				Applicant				
9	App, Test		Test Organization	Rocky mountain	12/17/2012	status 3	Applicant				
	F, Kim		Test Organization								
10	Carpenter, Forster L		Test Organization	Rocky mountain	5/22/2013		Applicant	0.00			
11	Guy, New		Test Organization								
	Asdfasdf, Asdfasdf		Test Organization		8/26/2013		Applicant				

Records 1 through 13 of 13 << Previous Page 1 of 1 Next >>

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**Recent Reports** (show all)  
[Email Addresses \(for 4 records\)](#)  
[Students Class Schedules \(for ...\)](#)  
[Students Class Schedules \(for ...\)](#)  
[Students Class Schedules \(for ...\)](#)

**Recently Visited**  
Matthew Hudson  
Edward F. Burg III  
International Training Institute  
John Smith

## Instructors

The Instructors grid provides access to existing, active instructors. This grid is not used all that frequently but does provide access to add new instructors or access the instructor pool of individuals for further documentation.

The screenshot shows the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Education (highlighted), CMS, Reporting, Admin, and My Employment. Below this, a sub-navigation bar lists Students, Applicants, Instructors (circled in red), Classes, Courses, Test Questions, Evaluations, and Settings. The main content area is titled "Instructors" and features a "Create Instructor" button and a "Deactivate" button. A table titled "Instructors - default filter" displays a list of instructors with columns for Name, Organization, Phone, Email, and Inactive. The table contains eight rows of data. On the right side, there is a sidebar with a search bar, quick links, and recent reports.

Name	Organization	Phone	Email	Inactive
<input type="checkbox"/> Todd Brown	Test Organization	(540) 497-3341	edb@datarg.com	
<input type="checkbox"/> Chris Valverde	Test Organization			
<input type="checkbox"/> Test Student	Test Organization		bradf+testorg@datarg.com	
<input type="checkbox"/> Tin Bender	Test Organization	(123) 456-7890	gdonovaniii@gmail.com	
<input type="checkbox"/> Joe "JR" Tin Man	Test Organization	(000) 111-4444		
<input type="checkbox"/> Bob Flob	Test Organization	(540) 555-7878		
<input type="checkbox"/> Brad Foster	Test Organization	(540) 692-9114	bfoster+89@datarg.com	
<input type="checkbox"/> Test Test	Test Organization	(571) 257-2676	camilleb+test@datarg.com	

## Classes

The class grid provides access to all classes, past, present and future. It also provides direct access to a specific class that instructors or administrative staff may need access too. A typical class profile is also provided below and is one of the more important centerpieces within the education module.

The screenshot displays the 'Classes' page in the Union Fusion system. The page header shows the user is logged in as Matthew Hudson. The navigation menu includes Dashboard, Documents, Contacts, Education (selected), CMS, Reporting, Admin, and My Employment. The 'Classes' page features a 'Create Class' button, a 'Deactivate' button, and a search bar. A table lists various classes with columns for Course, Class, Organization, Region, Code, Type, Date, Instructor, Students (W), and Inactive. A red arrow points from the 'Math 101' class in the table to a detailed view of that class. The detailed view shows class information, a list of students, and class documents.

Course	Class	Organization	Region	Code	Type	Date	Instructor	Students (W)	Inactive
Architectural 1	SMO25_Fall2011	Test Organization	Rocky mountain	ARC1	All Members	9/1/2011 - 12/31/2011	Chris Valverde	3 (0)	
Industrial	Sheet Metal Intro_Fall 2012	Test Organization	Rocky mountain	IND1	All Members	12/2/2011 - 12/16/2011	Tin Bender	3 (0)	
OSHA 10	Local 45 OSHA 10 12/29/2011	Test Organization	Rocky mountain		All Members	12/29/2011 - 12/30/2011	Test Architectural Instructor	3 (0)	
SMO25	Sheet Metal 101	Test Organization	Rocky mountain	SMO25	All Members	1/16/2012 - 5/25/2012		2 (0)	
Basic Math	Math 101	Test Organization	Rocky mountain	BM1	All Members	2/1/2012 - 2/29/2012		2 (0)	
Basic Math	asdfasdf	Test Organization	Rocky mountain	BM1	Apprentice	4/23/2012 - 4/28/2012		1 (0)	
SMO25	SMO25_Fall	Test Organization	Rocky mountain	SMO25	All Members	9/1/2012 - 12/1/2012	Chris Valverde	3 (0)	
SMO25	St Louis Test Class	Test Organization	Rocky mountain	SMO25	All Members	6/18/2012			
Basic Math	St Louis Test Class 2	Test Organization	Rocky mountain	BM1	Apprentice	6/18/2012			
Basic Math	Justin's test class, delete if its not Monday	Test Organization	Rocky mountain	BM1	Apprentice				
SMO16	SMO16 2012 Fall A	Test Organization	Rocky mountain	SMO16	Apprentice				
SMO16	testing copy from course	Test Organization	Rocky mountain	SMO16	Apprentice				
SMO16	SMO16 2012 Fall B	Test Organization	Rocky mountain	SMO16	Apprentice				

**Math 101 Class Details**

**Class Info**

- Course: Basic Math
- College Code:
- Category: Architectural
- Credits: 6.0
- Short Description: null
- Long Description:
- Section:
- Class Limit: 20
- Type: All Members
- Location:
- Region: Rocky mountain

**Class Details**

- Instructors:
- Time: 9:00 am - 5:00 pm
- Days: Mon, Tue, Wed, Thu, Fri
- Start Date: 2/1/2012
- End Date: 2/29/2012
- Location:

**Students**

Name	Percentage	Grade	Passed	Enrollment Type	Phone	Email	Employer	Attendance
Smith, John					(571) 765-2131	johnsmith@catarg.com	ACCO	0.00
Test, Test					(571) 449-3110	testtest@catarg.com	Test Organization	0.00

**Class Documents**

File Name	Uploaded	Points

## Courses

The course object serves as a template for classes. When administrators begin the process of creating classes for a given school period, they should ensure that the parent course already exists and is up-to-date in the system.

During class creation, a parent course will be selected and the class will inherit certain elements from the course during its creation process. By and large a course is similar to a class except that it lacks: time, dates, location and instructors.

The screenshot displays the Union Fusion Education portal. The top navigation bar includes links for Dashboard, Documents, Contacts, Education (highlighted), CMS, Reporting, Admin, and My Employment. Below this, a sub-navigation bar shows Students, Applicants, Instructors, Classes, Courses (highlighted with a red circle), Test Questions, Evaluations, and Settings. The main content area is titled 'Courses' and features a '+ Create Course' button. A table lists various courses with columns for Course, Organization, Code, Category, Credits, and Inactive. The table includes courses like SMQ25, Architectural 1, Electric202, Justin's Test Course, OSHA 10, Industrial, Basic Math, SMO16, Architectural 101, and Course for Module Test. A sidebar on the right contains a Search bar, Quick Links (including ITI Windows Reader), Help (with links to Help with this page, Help / Forums, and Submit a Request), Recent Reports (showing Email Addresses and Students Class Schedules), and Recently Visited (listing David M Supergan, Matthew Hudson, Edward F. Burg III, International Training Institute, and John Smith). The footer indicates 'A Data Research Group Application © 2015' and '1/14/2015 5:05 PM EST | v 1.26 | rev'.

Course	Organization	Code	Category	Credits	Inactive
SMQ25	Test Organization		Architectural		
Architectural 1	Test Organization	ARC1	Architectural		
Electric202	Test Organization	ELE202	Architectural		
Justin's Test Course	Test Organization		Architectural		
OSHA 10	Test Organization		Architectural		
Industrial	Test Organization	IND1	Industrial/Welding		
Basic Math	Test Organization	BM1	Core		
SMO16	Test Organization	SMO16	Detailing	1.0	
Architectural 101	Test Organization	Arc101	Architectural	1.0	
Course for Module Test	Test Organization	123	Core	3.0	

## Test Questions

Union Fusion contains its own test management system that allows instructors and staff administrators to both create a question bank (large set of questions) and build tests from that.

UF can also provide statistical analysis of questions to evaluate the success/failure of certain questions being used on tests or quizzes.

There is a great deal of functionality embedded into the 'Test module' and formal training time is required for its use and implementation.

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Viewing From: [Test Questions](#)  
Manage Associations

Dashboard Documents Contacts **Education** CMS Reporting Admin My Employment

Students Applicants Instructors Classes Courses **Test Questions** Evaluations Settings

### Test Questions

Quick Search

Text	Type	Book	Section	Page	Keywords	Created	By	Organization	Inactive
8 974 465 817 6 292 9 818 576 639	Short Text	Testing, Adjusting and Balancing - Instructor Guide	Testing, Adjusting and Balancing (Instructor): Unit 1: A Future in Testing, Adjusting and Balancing		Addition, Math	9/15/2012	System User	International Training Institute	
6 843 4 287 9 182 5 817 6 454	Short Text	Testing, Adjusting and Balancing - Instructor Guide	Testing, Adjusting and Balancing (Instructor): Unit 1: A Future in Testing, Adjusting and Balancing		Addition, Math	9/15/2012	System User	International Training Institute	
3 286 989 82,164 87 412 9 678 824	Short Text	Testing, Adjusting and Balancing - Instructor Guide	Testing, Adjusting and Balancing (Instructor): Unit 1: A Future in Testing, Adjusting and Balancing		Addition, Math	9/15/2012	System User	International Training Institute	
5 304 - 2 675	Short Text	Testing, Adjusting and Balancing - Instructor Guide	Testing, Adjusting and Balancing (Instructor): Unit 1: A Future in Testing, Adjusting and Balancing		Subtraction, Math	9/15/2012	System User	International Training Institute	
5 376 - 1 849	Short Text	Testing, Adjusting and Balancing - Instructor Guide	Testing, Adjusting and Balancing (Instructor): Unit 1: A Future in Testing, Adjusting and Balancing		Subtraction, Math	9/15/2012	System User	International Training Institute	
5 980 - 98	Short Text	Testing, Adjusting and Balancing - Instructor Guide	Testing, Adjusting and Balancing (Instructor): Unit 1: A Future in Testing, Adjusting and Balancing		Subtraction, Math	9/15/2012	System User	International Training Institute	
645 x 34	Short Text	Testing, Adjusting and Balancing - Instructor Guide	Testing, Adjusting and Balancing (Instructor): Unit 1: A Future in Testing, Adjusting and Balancing		Multiplication, Math	9/15/2012	System User	International Training Institute	
5 346 x 752	Short Text	Testing, Adjusting and Balancing - Instructor Guide	Testing, Adjusting and Balancing (Instructor): Unit 1: A Future in Testing, Adjusting and Balancing		Multiplication, Math	9/15/2012	System User	International Training Institute	
102 x 3 x 16 =	Short Text	Testing, Adjusting and Balancing - Instructor Guide	Testing, Adjusting and Balancing (Instructor): Unit 1: A Future in Testing, Adjusting and Balancing		Multiplication, Math	9/15/2012	System User	International Training Institute	

Quick Search

Quick Links (add | manage)

ITI Windows Reader

Help (show tooltips)

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Recent Reports (show all)

Email Addresses (for 4 records)  
Students Class Schedules (for ...  
Students Class Schedules (for ...  
Students Class Schedules (for ...

Recently Visited

David M Supergan  
Matthew Hudson  
Edward F. Burg III  
International Training Institute  
John Smith

## Evaluations

Union Fusion support evaluations that are issued by staff personnel to evaluate any number of 'people-based' roles in the organization. For example, a group of students can each be sent an evaluation on a specific instructor, or the instructor can receive a collection of evaluations to provide feedback on the student's performance.

The system is very flexible and will allow for a strictly electronic capture of evaluations or it will also support the scanning of hard copy evaluations.

Evaluation templates can be created by instructors or administrative staff for use and reuse across school periods.

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Manage Associations [dropdown]

Dashboard Documents Contacts **Education** CMS Reporting Admin My Employment

Students Applicants Instructors Classes Courses Test Questions **Evaluations** Settings

### Evaluations

**Evaluations - default filter**

<input type="checkbox"/>	Template	Description	Evaluator	Evaluatee	Due Date	Assigned	Student Year	Wage Level	Status	Satisfactory	Points
<input type="checkbox"/>	Test Template	7/26/2012	ACCO	Smith, John	7/31/2012	7/26/2012			Pending		1/3
<input type="checkbox"/>	Test Template	7/26/2012	ACCO	Smith, John	7/31/2012	7/26/2012			Pending		
<input type="checkbox"/>	Apprentice Evaluation	11/5/2012 - 12/17/2012	Test Organization	Torres, Justin	12/31/2012	12/18/2012			Evaluatee Review		100/200
<input type="checkbox"/>	Apprentice Evaluation	10/1/2012 - 12/17/2012	Test Organization	Burg, Christopher "Chris" Paul	12/31/2012	12/18/2012			Pending		
<input type="checkbox"/>	Apprentice Evaluation	10/1/2012 - 12/17/2012	Test Organization	Torres, Justin	12/31/2012	12/18/2012			Pending		
<input type="checkbox"/>	Apprentice Evaluation	10/1/2012 - 12/17/2012	ACCO	Burg, Christopher "Chris" Paul	12/31/2012	12/18/2012			Pending		
<input type="checkbox"/>	Apprentice Evaluation	12/18/2012	Test Organization	Smith, John	12/21/2012	12/18/2012			Pending		100/200
<input type="checkbox"/>	Apprentice Evaluation	12/18/2012	Test Organization	Burg, Christopher "Chris" Paul	12/21/2012	12/18/2012			Evaluatee Review		100/200
<input type="checkbox"/>	Apprentice Evaluation	12/18/2012	Test Organization	Torres, Justin	12/21/2012	12/18/2012			Pending		

**Search** (hide sidebar)

**Quick Links** (add | manage)  
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**Recent Reports** (show all)  
[Email Addresses \(for 4 records\)](#)  
[Students Class Schedules \(for ...\)](#)  
[Students Class Schedules \(for ...\)](#)  
[Students Class Schedules \(for ...\)](#)

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## Settings

As with other settings menus buried in the framework, this settings menu provides configuration options and in this case, applies specifically to the education module. Similar to the 'Financials | Settings', this option has a large number of settings due to the complexity and development maturity of the education piece.

Also, as with other settings menus in other modules, it is recommended that only select admin staff have access to make changes here as it will affect all of education. Training and time to understand the various configuration options is required for an in-depth knowledge of this piece.

The screenshot shows the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Education (highlighted), CMS, Reporting, Admin, and My Employment. Below this, a sub-navigation bar lists various education-related items: Students, Applicants, Instructors, Classes, Courses, Test Questions, Evaluations, and Settings (circled in red). The main content area is titled 'Settings' and contains several sections: 'Security Groups' with dropdowns for Default student group (Student), Default instructor group (Instructors), and Default coordinator group; 'Upgrades' with a dropdown for Send upgrade notices to, a dropdown for Interval (6 Months), and a checkbox for Automate upgrades by indenture date; 'Applications' with a checkbox for Use average of test and personal evaluation score as total application score; and 'Classes' with a table for Class periods and a list of Class options. The right sidebar contains a Search box, Quick Links, Help, Recent Reports, and Recently Visited sections.

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Viewing From: [Home](#) | [My Profile](#) | [Settings](#) | [Logout](#)

Dashboard Documents Contacts **Education** CMS Reporting Admin My Employment

Students Applicants Instructors Classes Courses Test Questions Evaluations **Settings**

### Settings

#### Education Settings

**Security Groups:**

Default student group:

Default instructor group:

Default coordinator group:

**Upgrades:**

Send upgrade notices to:

Interval:

Upgrade options: ☐ Automate upgrades by indenture date

**Applications:**

Options: ☐ Use average of test and personal evaluation score as total application score

**Classes:**

Name	Month	Day	Order
<a href="#">Add Period</a>			

Class options:

- ☒ Allow contacts to be added to classes
- ☐ Allow people from child organizations to be added to classes
- ☐ Allow authenticated journeymen to register online
- ☐ Allow authenticated apprentices to register online
- ☐ Allow authenticated Coordinators to register students online
- ☐ Default class files to private
- ☐ Create attendance records at enrollment

**Search** (hide sidebar)

Quick Search

**Quick Links** (add | manage)

[ITI Windows Reader](#)

**Help** (show tooltips)

[Help with this page](#)

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**Recent Reports** (show all)

[Email Addresses \(for 4 records\)](#)

[Students Class Schedules \(for ...\)](#)

[Students Class Schedules \(for ...\)](#)

[Students Class Schedules \(for ...\)](#)

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## Upgrades, Work Reports, Career Paths and other misc.

While they are not exposed through the 2<sup>nd</sup> level menu architecture that is a part of the education module, the items listed in this section are still available as part of the Union Fusion framework.

Upgrades all staff personnel to move construction trade apprentices up through their levels based on a wide variety of criteria, including but not limited to: work (OJT) hours, school hours, attendance and numerous other properties. The upgrade piece provides a very flexible system that adapts to literally any upgrade scenario JATC's currently support.

Union Fusion also boasts a very powerful OJT hour's collection module that permits students access via mobile devices to record their time on a daily, weekly or monthly basis as may be required. All information captured on OJT happens with a tremendous amount of additional information for statistical analysis in the future.

Career paths are simply a means to formulate a program or defined curriculum for students entering an apprenticeship training center. At any point in time, the student can evaluate the career path (program) requirements and compare that against the courses they have already taken to 'know what's left'.

For JATC's requiring financial integration, the education module is designed to integrate very cleanly with the financial module, such that during class registration, invoices to the students or the companies they work for, can be automatically and easily generated and then managed.

There are a number of other features and functions not discussed here that are part of the education module that can be more readily disclosed in a GoTo Meeting demonstration.

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## FINANCIALS

The financials module is a very complex and capable module within the Union Fusion framework. In principle, the system is dual ledger entry system where credits and debits exist on every sort of transaction.

There are numerous facets to the financial module and perhaps the most important in terms of understanding is its integration into everything else. Financials integrate with: classes, events, e-store, membership and dues, fees, and book sales. Additionally, the financials can be used to manage outgoing payments related to a number of processes in the system, including but not limited to: refunds, benefit payments, credit payments, pension payments, etc.

For organizations using the financials module, there is a fair amount of training and integration time that is required setting up the system and configuration values under the settings menu should be protected.

The financial module is also capable of integration with credit card merchants Stripe and Authorize.NET as well as e-Check (ACH) merchant Dwolla.

## Process Dues

The dues process screen is optimized for union locals that process a good deal of their dues via mail or at the counter. The interface is optimized for dealing with a large number of variations that exist in dues processing at locals throughout the country.

The dues processing screen will allow staff personnel to select multiple periods and to add or remove fees that may apply to a given member transaction. Receipts that result from this process can be either electronic or hard receipts going to the printer. The electronic receipts are actually more secure and can be verified by business agents or other union reps out in the field with a smart phone or mobile device.

The screenshot displays the 'Process Dues' interface within the Union Fusion system. At the top, the 'union fusion' logo is on the left, and user information 'Logged on as Matthew Hudson' with links for 'Messages (0)', 'My Profile', 'Settings', and 'Logout' is on the right. Below this is a navigation bar with tabs for 'Dashboard', 'Documents', 'Contacts', 'Membership', 'Events', 'Education', 'Financial' (which is active), 'Out-of-Work List', 'Bids', 'Organizing', 'CMS', 'Reporting', 'Admin', and 'My Employment'. Under the 'Financial' tab, a sub-menu includes 'Process Dues' (highlighted with a red circle), 'Orders', 'Payments', 'Batches', 'Contributions', 'Pledges', 'Accounts', 'Disbursements', and 'Settings'. The main content area is titled 'Process Dues' and features a 'New Dues Payment' section with a 'Payment from:' dropdown menu and 'Proceed' and 'Cancel' buttons. On the right sidebar, there are sections for 'Search' (with a 'Quick Search' input and 'Go' button), 'Quick Links' (with an 'add | manage' link), 'Help' (with links for 'Help with this page', 'Help / Forums', and 'Submit a Request'), and 'Recent Reports' (with links for 'Revenue Summar...' and 'Revenue Summar...'). At the bottom center, a small footer reads 'A Data Research Group Application © 2015 1/14/2015 8:08 PM EST | v 1.26 | rev'.

## Orders

The centerpiece for the financials module is the order. An order represents a time-stamped interaction between the local/JATC/Fund office and the recipient (typically a member, apprentice or pensioner). The order has related details that all local union staff to formally track the event in much the same way that sales in a retail store would occur. Each order has numerous dates and related line items that can be associated with it. Orders can be paid off at the desk by staff members or paid electronically online through the member or contractor portal. Orders can generate invoice-like reports that can be printed to show an amount due when money is still dues against the order, or show payments similar to a receipt when the order has been paid partial or in full.

The screenshot displays the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, Admin, and My Employment. The 'Financial' tab is selected, and the 'Orders' sub-tab is active. A red circle highlights the 'Orders' link in the sub-tab menu.

The main content area shows a list of orders with columns: Order #, Group #, Contact, Company, Created, Invoiced, Due, Past Due (Days), Amount, Paid, Due, Status, and Actions. The order 000000000 is highlighted in yellow. A red arrow points from this order to a detailed view of the order.

The detailed view of order 000000000 shows the following information:

- Order Info:** Order # 000000000, Group # 000000000, Contact: Matthew Hudson, Company: Hudson, Created: 1/16/2015, Invoiced: 1/16/2015, Due: 1/16/2015, Past Due (Days): 0, Amount: \$10.00, Paid: \$0.00, Due: \$10.00, Status: Unpaid, Actions: void.
- Payment Info:** Net Total: \$10.00, Received: \$0.00, Total: \$10.00, Payable: \$0.00, Balance Due: \$10.00.
- Line Items:** A table with columns: Item #, Description, Unit, Quantity, Unit Price, Total, Status, and Action. The first line item is 000000000, Description: Public Fund, Unit: 1, Quantity: 1, Unit Price: \$10.00, Total: \$10.00, Status: Unpaid, Action: void.

The bottom of the screen shows the footer: 'A Data Research Group Application © 2015 1/14/2015 8:08 PM EST | v 1.26 | rev'.

## Payments

Payments refer to 'incoming' payments from the member, person or contractor to the local union. Payments are also associated with an individual or a company and can be viewed from that perspective as well.

As has been mentioned before, Union Fusion is capable of various payment types: including cash, credit cards, e-Check (ACH) and others. Payments are very flexible in that a single payment can be applied to multiple orders or just a part of one order.

The payments grid can be searched across all fields for all time. Payments are typically searched to resolve or reconcile financial issues that come up in normal operational activities.

The screenshot displays the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Financial, Out-of-Work List, Bids, Reporting, Admin, and My Employment. The 'Financial' tab is active, showing a sub-menu with Process Dues, Orders, Payments, Batches, Contributions, Pledges, Accounts, Disbursements, and Settings. The 'Payments' sub-menu item is highlighted.

The main content area shows the 'Payments' grid. The grid has columns for Transaction #, Batch, Contact, Date, Source, Method, Status, Amount, Credit, Allocated, Receipt #, and Online. A red arrow points from the 'Payments' grid to a detailed view of a specific payment (Transaction # 53224814).

The detailed view shows the following information:

- Transaction Info:** Transaction # 53224814, Batch 00002693, Date 12/17/2014, Payment Source Incoming, Receipt Number 137823.
- Payment Method:** Credit Card Swipe, Payment Amount \$110.00, Status Settled, Memo A/C #1232, Credit Used \$0.00, Total Applied \$110.00.
- Items:** A table showing the application of the payment to various items.

Item #	Details	Date	Total	Applied
635174280	Default Building Trades Regular Member - November 2014 Payment	11/12/14	\$35.00	\$35.00
635277878	Initiation	8/20/14	\$500.00	\$75.00

## Batches

A batch is formal way to capture incoming payment into the local union. For reconciliation and auditing purposes, each batch should represent a collection of payments that went to the bank as a single deposit. It is arbitrary and completely up to the local when it comes to the size and number of transactions in the batch. Some institutions will deposit daily, some weekly and still others, only once per month. In any case, to maximize the use and function of the batch, ensure that each batch represents a single bank deposit.

The batch also supports a couple of different view to see how money is moving around on an account basis. Additionally, there are standard reports that should be printed out every time a batch goes to completion and is closed. This paperwork can be stored with the original paperwork from the payments (i.e. Copies of checks and cash that came in the mail or to the counter).

The screenshot displays the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Financial, Out-of-Work List, Bids, CMS, Reporting, Admin, and My Employment. The 'Financial' tab is active, and the 'Batches' sub-tab is selected. The main content area shows a list of batches with columns for Batch Id, Date, # Transactions, Total, Automated?, Status, and Approved. The first batch, 'Starting Personal Credit', is highlighted in yellow. A red arrow points from this batch to a detailed view window titled 'Batch Starting Personal Credit'. This window shows batch details such as Batch Id, Organization, Date, Total, # Transactions, Automated?, Direction, and Approved. Below the details is a table of transactions with columns for Transaction #, Contact, Date, Payment Method, Amount, Status, Settle, Receipt, and Check #.

Batch Id	Date	# Transactions	Total	Automated?	Status	Approved
Starting Personal Credit	7/1/2014	2446	\$159,897.65		Open	No
00000001		0	\$0.00		Open	No
00000002	12/31/1999	1	\$60.00		Closed	No
00000003	1/3/2000	201	\$7,603.33		Closed	No
00000004	1/4/2000	415	\$5,395.00		Closed	No
00000005	1/5/2000	162	\$5,894.49		Closed	No
00000006	1/6/2000	319	\$19,635.16		Closed	No
00000007	1/8/2000	258				
00000008	1/9/2000	382				
00000009	1/11/2000	315				
00000010	1/12/2000	87				
00000011	1/13/2000	383				
00000012	1/14/2000	535				

Transaction #	Contact	Date	Payment Method	Amount	Status	Settle	Receipt	Check #
2331544	Wendell, William	7/1/2014	Cash	\$10.00	Settled			
2331543	Joe, Timothy	7/1/2014	Cash	\$25.00	Settled			
2331542	Wendell, William	7/1/2014	Cash	\$25.00	Settled			
2331541	Joe, Timothy	7/1/2014	Cash	\$5.00	Settled			
2331540	Wendell, William	7/1/2014	Cash	\$25.00	Settled			

## Contributions

Contributions allow local unions or other organizations to receive a gift, donation or contribution for a variety of purposes. When tagged as a contribution, they money and information related to it can be reported on in a different capacity.

Contributions are different from payments in that there is no material order or invoice that exists against them and there are specific tax rules that should be observed when collecting money for these purposes.

The screenshot displays the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, Admin, and My Employment. The 'Financial' tab is active, and the 'Contributions' sub-tab is selected. The main content area shows a table of contributions with columns for Contact, Fund, Amount, Committed, and Paid. Two records are listed: 'Person, Sample' with a \$0.00 contribution to the 'Political Fund', and 'Hudson, Matthew' with a \$10.00 contribution to the 'Political Fund' committed on 1/16/2015. A sidebar on the right contains a search bar, quick links, help resources, recent reports, and recently visited users.

Contact	Fund	Amount	Committed	Paid
Person, Sample	Political Fund	\$0.00		
Hudson, Matthew	Political Fund	\$10.00	1/16/2015	

Records 1 through 2 of 2

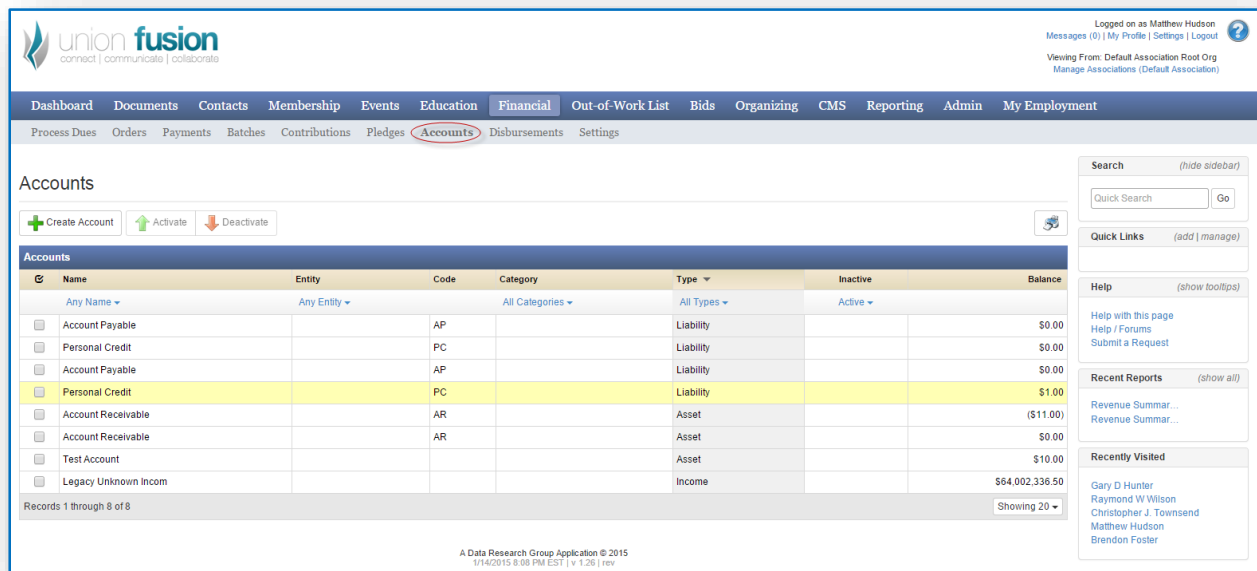
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## Accounts

Union Fusion supports a number of different account types to support the variety of transaction types that may exist. Some of these account types include: asset, liability, income, etc. These accounts allow for the segmentation of monies that may be received for different purposes.

For example, when money comes in for dues for a specific member for a specific month, a portion of that money is typically retained at the local and a portion of that money is typically sent off to the international or national level organization. This is common practice in both locals and associations who collection membership dues. One payment is made, but that money can be divided up in the background to credit the income account of the local union and also credit the liability account of the national level organization.

The number of accounts and ways to divide the money on incoming payments are numerous and this model, standard to most accounting systems, provides for a very efficient and easy-to-manage system when it comes to allocating funds.



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Viewing From: Default Association Root Org  
Manage Associations (Default Association)

Dashboard Documents Contacts Membership Events Education Financial Out-of-Work List Bids Organizing CMS Reporting Admin My Employment

Process Dues Orders Payments Batches Contributions Pledges Accounts Disbursements Settings

### Accounts

[+ Create Account](#) [+ Activate](#) [- Deactivate](#)

Name	Entity	Code	Category	Type	Inactive	Balance
<input type="checkbox"/> Account Payable		AP		Liability		\$0.00
<input type="checkbox"/> Personal Credit		PC		Liability		\$0.00
<input type="checkbox"/> Account Payable		AP		Liability		\$0.00
<input type="checkbox"/> Personal Credit		PC		Liability		\$1.00
<input type="checkbox"/> Account Receivable		AR		Asset		(\$11.00)
<input type="checkbox"/> Account Receivable		AR		Asset		\$0.00
<input type="checkbox"/> Test Account				Asset		\$10.00
<input type="checkbox"/> Legacy Unknown Income				Income		\$64,002,336.50

Records 1 through 8 of 8 Showing 20

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Search (hide sidebar)  
Quick Search Go

Quick Links (add | manage)

Help (show tooltips)  
Help with this page  
Help / Forums  
Submit a Request

Recent Reports (show all)  
Revenue Summar...  
Revenue Summar...

Recently Visited  
Gary D Hunter  
Raymond W Wilson  
Christopher J Townsend  
Matthew Hudson  
Brendon Foster

## Disbursements

Disbursements are different from payments in that disbursements represent all outgoing payments from the organization to an entity (either a company or a person).

Disbursements can be and are created for a variety of reasons including but not limited to: refunds, credit pay offs, benefit payment, reimbursement payments, etc.

The disbursement system is somewhat guarded in that it requires a dual person approval process before payment can be generated and issued. Like incoming monies, outgoing disbursements are also managed in batches for reference and efficiency purposes.

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Viewing From: Default Association Root Org  
Manage Associations (Default Association)

Dashboard Documents Contacts Membership Events Education **Financial** Out-of-Work List Bids Organizing CMS Reporting Admin My Employment

Process Dues Orders Payments Batches Contributions Pledges Accounts **Disbursements** Settings

### Liability Accounts

Pay

Name	Entity	Code	Category	Inactive	Projected	Draft	Finalized	Balance
Any Name	Any Entity	All Categories	Active					
<input type="checkbox"/> Account Payable		AP			\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/> Personal Credit		PC			\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/> Account Payable		AP			\$0.00	\$0.00	\$0.00	\$0.00
<input type="checkbox"/> Personal Credit		PC			\$1.00	\$0.00	\$0.00	\$1.00

Records 1 through 4 of 4 Showing 20

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Quick Search Go

Quick Links (add | manage)

Help (show tooltips)  
Help with this page  
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Submit a Request

Recent Reports (show all)  
Revenue Summar...  
Revenue Summar...

Recently Visited  
Gary D Hunter  
Raymond W Wilson  
Christopher J. Townsend  
Matthew Hudson  
Brendon Foster

## Settings

The settings 2<sup>nd</sup> level menu under financial is a means of configuring all of the various options related to the financial module. As you can imagine, there are a large number of options due to the large number of ways that financials themselves can be used in an organization.

In addition to standard configuration options, we also capture security keys and logins to connected payment vendors such as Stripe, Authorize.NET and Dwolla. As such, this 'settings' menu under Financials should be locked out except to a select few individuals inside the organization that have permission to view.

This settings menu will require Data Research Group support, instruction and initial setup to use.

The screenshot displays the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, Admin, and My Employment. The 'Financial' menu is expanded, showing sub-options like Process Dues, Orders, Payments, Batches, Contributions, Pledges, Accounts, Disbursements, and Settings (which is circled in red). The main content area is titled 'Settings' and contains a 'Basic' tab and a 'Processors' tab. The 'Financial Settings' section includes:

- Default Payment Accounts:** Dropdowns for Cash/check, Credit card, and ACH, all set to 'General Payment Account'.
- System Accounts:** Dropdowns for Account receivable (Account Receivable), Account payable (Account Payable), Personal credit (Personal Credit), and Surplus account.
- Notifications:** Dropdowns for Notify on cc processed, Notify on deposit, and Notify on invoice.
- Credit Cards:** A note stating 'Credit card fees are calculated based on the total INCLUDING the fee. e.g. Total = Round(Total \* Rate + Flat) + Order.' and a dropdown for Credit card fee type.

The right sidebar contains a Search bar, Quick Links, Help section, Recent Reports, and Recently Visited list.

# OUT OF WORK LIST

## Active List

The out of work list manages individuals in the construction trades who are currently out of work. Different local unions refer to this list in different ways including 'referral hall' and 'hiring hall' as well. The Union Fusion architecture is a very flexible architecture allowing multiple, and simultaneous lists to be managed in this area. This is represented by the 'Active List'.

Different locals again have different rules regarding how and where a person is placed on the list and how long they can stay there. Additionally, even if a member is dispatched to a job, the member can retain his position on the list dependent upon a number of variables or policies associated with the local union and its practices.

When members are added to the list, they gain an absolute position on the list and a position within their particular group. The use of groups inside the out of work list, provide for a very flexible architecture inside the UF framework. Every member that is added now has a candidate profile that is similar to a resume where skills and specialties can be managed. One very important facet to the candidate profile is the 'Related Activities'. The nature of the out of work list in local unions demand objectivity and transparency. The related activities help out in both regards by provided a managed list against the candidate profile, literally everything that happens with that candidate profile is tracked and recorded.

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Logged on as Matthew Hudson  
Messages (0) | My Profile | Settings | Logout  
Viewing From: Default Association Root Org  
Manage Associations (Default Association)

Dashboard Documents Contacts Membership Events Education Financial **Out-of-Work List** Bids Organizing CMS Reporting Admin My Employment

Active List Education List Dispatchers Job Orders Settings

Active List

+ Add Candidate - Drop Selected

Active Candidates - default filter - 2 records

Position	Name	Classification	Last Activity	Last Activity On	Group	Hours	Added	Suspended
1 (1)	Foster, Brad		Test Group	2/5/2014	Unemployed	0.00	2/4/2014 7:00 AM	
2 (2)	Person, Sample		Test Activity	2/5/2014	Unemployed	0.00	2/5/2014 7:00 AM	

Records 1 through 2 of 2

<< Previous Page 1 of 1 Next >>

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Search (hide sidebar)  
Quick Search Go  
Quick Links (add | manage)  
Help (show tooltips)  
Help with this page  
Help / Forums  
Submit a Request  
Recent Reports (show all)  
Revenue Summar...  
Revenue Summar...

## Dispatchers

The dispatcher's grid simply provides a list of dispatchers that have the ability to record activities against candidate's records as well as dispatch those members to a job. This can happen with or without a job order.

Dispatchers can be added to the system by way of this functions provided on this grid as well.

The screenshot displays the Union Fusion web application interface. The top navigation bar includes the Union Fusion logo and a user profile section indicating the user is logged in as Matthew Hudson. Below the navigation bar, a sub-menu highlights the 'Dispatchers' option. The main content area features a 'Dispatchers' section with a table listing two dispatchers: Chris Hobeck and a Member Example. The table columns are Name, Location, Phone, and Email. To the right of the table, there are controls for adding or deactivating dispatchers. The sidebar on the right contains sections for Search, Quick Links, Help, Recent Reports, and Recently Visited.

Logged on as Matthew Hudson  
Messages (0) | My Profile | Settings | Logout  
Viewing From: Default Association Root Org  
Manage Associations (Default Association)

Dashboard Documents Contacts Membership Events Education Financial **Out-of-Work List** Bids Organizing CMS Reporting Admin My Employment

Active List Education List **Dispatchers** Job Orders Settings

### Dispatchers

[+ Add / Activate](#) [X Deactivate](#)

Name	Location	Phone	Email
<input type="checkbox"/> Hobeck, Chris			<a href="mailto:chrish@datarg.com">chrish@datarg.com</a>
<input type="checkbox"/> Member, Example	Culpeper, VA	800-381-1773	<a href="mailto:joelp+ntest@datarg.com">joelp+ntest@datarg.com</a>

Records 1 through 2 of 2 << Previous Page 1 of 1 Next >>

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**Search** (hide sidebar)  
Quick Search  Go

**Quick Links** (add | manage)

**Help** (show tooltips)  
[Help with this page](#)  
[Help / Forums](#)  
[Submit a Request](#)

**Recent Reports** (show all)  
[Revenue Summar...](#)  
[Revenue Summar...](#)

**Recently Visited**  
[Home](#)  
[My Profile](#)  
[My Employment](#)  
[My Employment](#)  
Matthew Hudson  
Brendon Foster

## Job Orders

By definition, a job order is request (typically from a contractor) to obtain construction trade workers with specific skills onto a specific job and location. Job Orders can request more than 1 person as long as the position and required skills are the same.

Job Orders can be created by either contractors or business agents and when they are created by contractors, they required business agent approval before moving forward.

The Job Order also contains a requested set of skills that are optional to the job itself. When the skills are listed out as part of the job order, UF will interrogate the out of work list and then prioritize individuals based upon the number of matching skills and then their order on the list. This filter, once applied will show to the end user automatically when they open up the job order profile. This gives opportunity to the dispatchers or business agents to look over the returned list and choose the candidates that will be initially called and then dispatched.

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Logged on as Matthew Hudson  
Messages (0) | My Profile | Settings | Logout  
Viewing From: [dropdown] | [dropdown] | [dropdown] | [dropdown]  
Manage Associations [link]

Dashboard Documents Contacts Membership Financial **Out-of-Work List** Bids Reporting Admin My Employment

Active List Dispatchers **Job Orders** Settings Willing to Travel

### Job Orders

[+ Create Job Order](#)

Job Orders - default filter [Quick Search](#)

Number	Company	Job Site	Date	# Requested	Contact	Phone #	Status	Created	Inactive
26990010	TEST LOCATION		6/23/2014 8:00 AM	1	person	3143712800	Open	6/20/2014 4:40 PM	

Records 1 through 1 of 1 << Previous Page 1 of 1 Next >>

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**Search** (hide sidebar)  
Quick Search  Go

**Quick Links** (add | manage)  
[Pay Dues](#)

**Help** (show tooltips)  
[Help with this page](#)  
[Help / Forums](#)  
[Submit a Request](#)

**Recent Reports** (show all)  
[Revenue Summar...](#)  
[Revenue Summar...](#)

## Settings

There are a large number of configuration settings available to staff personnel for governing the settings associated with the out of work list as well as directing the logic implemented by the job order search mechanism when a job order profile is opened.

In addition to the 'settings' related to the out of work list, there are also, 'Activity Rules' and 'Service Trades' that should be populated in order to correctly ensure all of the pieces of the out of work list are operating as expected in the context of the local union using them. Training, setup and configuration should be implemented by experienced professional in order to correctly implement this module.

The screenshot shows the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, Admin, and My Employment. The 'Financial' tab is selected, and the 'Settings' sub-tab is highlighted. The main content area is titled 'Settings' and contains two tabs: 'Basic' and 'Processors'. The 'Basic' tab is active, showing the 'Financial Settings' section. This section includes several sub-sections: 'Default Payment Accounts' with dropdowns for Cash/check, Credit card, and ACH; 'System Accounts' with dropdowns for Account receivable, Account payable, Personal credit, and Surplus account; 'Notifications' with checkboxes for Notify on cc processed, Notify on deposit, and Notify on invoice; and 'Credit Cards' with a dropdown for Credit card fee type. A note at the bottom states: 'Credit card fees are calculated based on the total INCLUDING the fee. e.g. Total = Round(Total \* Rate + Flat) + Order.' The right sidebar contains a search bar, quick links, help, recent reports, and recently visited items.

union fusion  
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Logged on as Matthew Hudson  
Messages (0) | My Profile | Settings | Logout  
Viewing From: Default Association Root Org  
Manage Associations (Default Association)

Dashboard Documents Contacts Membership Events Education Financial Out-of-Work List Bids Organizing CMS Reporting Admin My Employment

Process Dues Orders Payments Batches Contributions Pledges Accounts Disbursements **Settings**

### Settings

Basic Processors

#### Financial Settings

**Default Payment Accounts:**

Cash/check: General Payment Account ▼

Credit card: General Payment Account ▼

ACH: General Payment Account ▼

**System Accounts:**

Account receivable: Account Receivable ▼

Account payable: Account Payable ▼

Personal credit: Personal Credit ▼

Surplus account: ▼

**Notifications:**

Notify on cc processed: ▼

Notify on deposit: ▼

Notify on invoice: ▼

**Credit Cards:**

Credit card fee type: ▼

Credit card fees are calculated based on the total INCLUDING the fee. e.g. Total = Round(Total \* Rate + Flat) + Order.

**Search** (hide sidebar)

Quick Search Go

**Quick Links** (add | manage)

**Help** (show tooltips)

Help with this page  
Help / Forums  
Submit a Request

**Recent Reports** (show all)

Revenue Summar...  
Revenue Summar...

**Recently Visited**

Matthew Hudson  
Brendon Foster

## ORGANIZING

The organizing module is designed to facilitate organizers and business agents to capture information about existing or upcoming projects and to track information on existing jobs.

Additionally, the module can be used to generate and track FOIA (Freedom of Information Act) Requests to government agencies.

### Projects / Jobs

The projects grid provides access to permissioned staff personnel to view existing or upcoming projects in the local area. There are companies that provide information dumps to populate the project grids, but configuration and a subscription are necessary.

Business agents or staff personnel can also populate the grid of projects by manually entering the information into the system. Essentially, a project represents work that is occurring at some designated location. There may be multiple contractors working on the project simultaneously. The industry has adopted the term of 'job' to represent a single contractor working at a single project. Union Fusion has the ability to track Jobs as well as the represented personnel that may be working at that job. For each person on the job, UF can also track their daily hours for oversight depending on the needs of the local union.

The screenshot shows the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Financial, Out-of-Work List, Organizing (selected), CMS, Reporting, Admin, and My Employment. Below this, a sub-navigation bar highlights 'Projects' (circled in red), with links for FOIAs and Research. The main content area is titled 'Projects' and features a '+ New Project' button. A table titled 'Projects - default filter' displays a list of projects with columns for Title, Taxing Body, Date Awarded, Total Amount, Status, Start Date, and Est. Complete Date. The table lists several projects, including Wood Dale SD 7, Tioga School Phase 2, Marquardt SD 15, Winfield SD 34, North Elem. School District 45 Villa Park, SchaferElem. and Jefferson Middle SD 45, Harvard SD 50, and Crystal Lake SD 47. On the right side of the interface, there is a search bar, quick links for Communication Search, Membership Classification By Year, and Membership Classification Chart Tutorials, a help section, and a recent reports section.

Title	Taxing Body	Date Awarded	Total Amount	Status	Start Date	Est. Complete Date
Wood Dale SD 7	Wood Dale SD 7 (School District)	4/29/2013				
Tioga School Phase 2	Bensenville SD 2 (School District)	4/25/2013				
Marquardt SD 15	Marquardt SD 15 (School District)	4/26/2013				
Winfield SD 34	Winfield SD 34 (School District)	4/30/2013				
North Elem. School District 45 Villa Park	SD 45, DuPage County (School District)	4/25/2013				
SchaferElem. and Jefferson Middle SD 45	SD 45, DuPage County (School District)	4/25/2013				
Harvard SD 50	Harvard CUSD 50 (School District)	6/6/2013			6/3/2013	8/29/2014
Crystal Lake SD 47	Crystal Lake CCSD 47 (School District)	6/6/2013			6/3/2013	8/30/2013

## FOIAs

FOIA stands for Freedom of Information Act. The FOIA 2<sup>nd</sup> level menu allows agents and organizers to create their own FOIA templates and FOIA to submit to government agencies.

The screenshot displays the Union Fusion web application interface. At the top, the logo "union fusion" is visible with the tagline "connect | communicate | collaborate". The user is logged in as Matthew Hudson, with links for Messages (0), My Profile, Settings, and Logout. The navigation bar includes Dashboard, Documents, Contacts, Membership, Financial, Out-of-Work List, Organizing (highlighted), CMS, Reporting, Admin, and My Employment. Below the navigation bar, the "FOIAs" section is active, showing a list of FOIA requests. A "New FOIA" button is present. The table lists various requests with columns for Name, Taxing Body, Representative, Date Created, Status, Type, Priority, Due Date, Contractors, and Projects. On the right side, there are sections for Search, Quick Links, Help, and Recent Reports.

Logged on as Matthew Hudson  
Messages (0) | My Profile | Settings | Logout

Viewing from: 10/10/2013 - 10/10/2013  
Manage Associations

Dashboard Documents Contacts Membership Financial Out-of-Work List **Organizing** CMS Reporting Admin My Employment

Projects **FOIAs** Research

### FOIAs

+ New FOIA

FOIAs - default filter

Name	Taxing Body	Representative	Date Created	Status	Type	Priority	Due Date	Contractors	Projects
New School Project Information Request	Data Research Group (test 265)	<a href="#">[Link]</a>	4/10/2013 10:29 AM		Test Template for School		4/12/2013 1:00 AM		
Another test foia	Data Research Group (test 265)	<a href="#">[Link]</a>	4/10/2013 2:29 PM		Test Template for School				
G Heating and Cooling	University Park (Village)	<a href="#">[Link]</a>	4/16/2013 9:52 AM	Closed	Building Permits		4/23/2013 1:00 AM		
Summer Work	Bourbonnais SD 53 (School District)	<a href="#">[Link]</a>	5/13/2013 4:17 PM	Closed	Summer School Work		5/21/2013 1:00 AM		
Bolingbrook-Permit Research	Bolingbrook (Village)	<a href="#">[Link]</a>	7/25/2013 8:43 AM	Sent	General Permit Research		8/2/2013 1:00 AM		
Romeoville-Permit Research	Romeoville (Village)	<a href="#">[Link]</a>	7/25/2013 8:48 AM	Closed	General Permit Research		8/2/2013 1:00 AM		
Crest Hill-Permit Research	Crest Hill (City)	<a href="#">[Link]</a>	7/25/2013 8:53 AM	Closed	General Permit Research		8/2/2013 1:00 AM		
Plainfield-Permit Research	Plainfield (Village)	<a href="#">[Link]</a>	7/25/2013 9:30 AM	Closed	General Permit Research		8/2/2013 1:00 AM		
Shorewood-Permit Research	Shorewood (Village)	<a href="#">[Link]</a>	7/25/2013 9:56 AM	Closed	General Permit Research		8/2/2013 1:00 AM		

**Search** (hide sidebar)  
Quick Search  Go

**Quick Links** (add | manage)  
[Communication Search](#)  
[Membership Classification By Year](#)  
[Membership Classification Chart](#)  
[Tutorials](#)

**Help** (show tooltips)  
[Help with this page](#)  
[Help / Forums](#)  
[Submit a Request](#)

**Recent Reports** (show all)  
[Revenue Summar...](#)  
[Revenue Summar...](#)

## REPORTING

There are numerous facets to the reporting module in Union Fusion. The reporting module was designed with the sole purpose of providing a single location to generate custom queries, reports and charts against all of the data in the system.

The module also has the capacity to integrate these custom queries and reports into existing grids through the Union Fusion architecture. For example, you can create a custom query in the reporting module on the 'Members' data class. When it is created there, it will show up on the member's grid under membership as a saved filter that staff personnel can run.

One really convenient concept that was implemented for the customer queries and templates is the ability for end users to share them to the entire organization (if they have holistic value).

The screenshot displays the Union Fusion Reporting module interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Education, CMS, Reporting (selected), Admin, and My Employment. Below this, a sub-navigation bar shows Queries (selected), Templates, Search, History, and Settings. The main content area is titled 'Queries' and features a '+ New Custom Query' button and a '- Delete Queries' button. A table titled 'Saved Queries' lists various queries with columns for Run, Name, Type, Category, Data Class, Output, Scope, and Organization. The table includes queries like 'Journey List', 'Veterans', 'Veteran', 'veteran', 'Veteran', 'test', 'Test', 'Class Test', and 'Contact Information by State'. The sidebar on the right contains a search bar, quick links, help, recent reports, and recently visited items.

Run	Name	Type	Category	Data Class	Output	Scope	Organization
	Journey List	Custom Query		Student	Grid	Association	
	Veterans	Grid Filter		Person	Grid	User	
	Veteran	Grid Filter		Person	Grid	User	
	veteran	Grid Filter		Person	Grid	User	
	Veteran	Grid Filter		Person	Grid	User	
	test	Custom Query		Student	Grid	Organization	Test Organization
	Test	Grid Filter			Grid	Organization	Test Organization
	Class Test	Custom Query		Class	Grid	Organization	Test Organization
	Contact Information by State	Custom Query		Person	Grid	Organization	Test Organization

## Queries

The query object in union fusion allows members to create simple or complex queries against established data classes in the Union Fusion architecture. A data class represents a collection of tables in some subject area in the database... for example: members, orders or students. Each one of these classes is represented by multiple tables storing data. The data classes themselves are defined by developers, but can be changed or added to easily in a single iteration.

The custom aspect of queries allows power users to implement 'and' and 'or' clauses into their query, select fields, a comparison operator and a value. The queries themselves can get quite complex and from time to time, do require expert help to resolve filtering issues.

The screenshot displays the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Education, CMS, Reporting, Admin, and My Employment. The 'Queries' section is active, showing a list of saved queries. A red arrow points from the 'Journey List' query in the 'Saved Queries' table to a detailed view of a custom query.

**Queries**

Logged on as Matthew Hudson  
Messages (0) | My Profile | Settings | Logout

Viewing from: 10/10/2015 10:00 AM  
Manage Associations

Dashboard Documents Contacts Education CMS Reporting Admin My Employment

Queries Templates Search History Settings

Queries

+ New Custom Query - Delete Queries

**Saved Queries**

Run	Name	Type	Category	Data Class	Output	Scope	Organization
<input type="checkbox"/>	Journey List	Custom Query	All Categories	Student	Grid	Association	
<input type="checkbox"/>	Veterans	Grid Filter		Person	Grid	User	
<input type="checkbox"/>	Veteran	Grid Filter		Person	Grid	User	
<input type="checkbox"/>	veteran	Grid Filter		Person	Grid	User	
<input type="checkbox"/>	Veteran	Grid Filter		Person	Grid	User	
<input type="checkbox"/>	test	Custom Query		Student	Grid	Organization	Test Organization
<input type="checkbox"/>	Test	Grid Filter					
<input type="checkbox"/>	Class Test	Custom Query		Class			
<input type="checkbox"/>	Contact Information by State	Custom Query		Person			

Records 1 through 9 of 9

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**Custom Query**

Criteria:

Logic: Data Field: Not Operator: Value: Param: Title

to journeyman - equals - True -

Add another field

Use simple logical grouping  
Use advanced logical grouping

Output Format:

Output Format: Grid

Use the columns included in the query

Select specific columns

Person - Name (Last First) - remove

Person - SSN (Full) - remove

Wage Level - Apprentice Type - remove

Person - Region - remove

Estimated Completion Date - remove

Add another column

Sort Fields:

Use the default sorting  
Select specific columns

Field: Asc Desc

Person - Name (Last First) - remove

Add another field

## Templates

Templates are represented by standard tabular exports to excel or to the built in data grids throughout the architecture. Tabular exports are essentially row and column output where no layout control is exercised.

In addition to tabular reports, Union Fusion implements a custom report builder through Active Reports, the Reporting tool used by developers for system level reports throughout the solution. The most common output delivery type for these reports are PDF (portable document format), but other options do exist.

Finally, end users can choose to have their information exported out to a chart object. The charting object in Union Fusion is HighCharts Javascript engine for ASP.NET.

union fusion  
connect | communicate | collaborate

Logged on as Matthew Hudson  
Messages (0) | My Profile | Settings | Logout

Viewing from: 1910.10.10.10  
Manage Associations

Dashboard Documents Contacts Education CMS Reporting Admin My Employment

Queries Templates Search History Settings

Exports

+ New Export - Delete

Name	Data Class	Scope	Organization
<input type="checkbox"/> general student info	Student	Organization	Test Organization
<input type="checkbox"/> Student Contact Information	Student	Organization	Test Organization
<input type="checkbox"/> User info - Testing	User	Organization	Test Organization

Records 1 through 3 of 3

<< Previous Page 1 of 1 Next >>

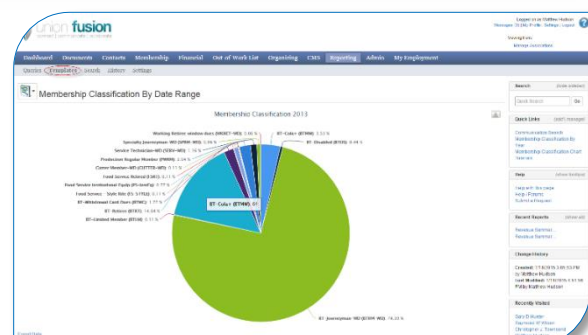
A Data Research Group Application © 2015  
1/14/2015 8:08 PM EST | v 1.26 | rev

Search (hide sidebar)  
Quick Search Go

Quick Links (add | manage)  
ITI Windows Reader


Help (show tooltips)  
Help with this page  
Help / Forums  
Submit a Request

Recent Reports (show all)  
Email Addresses (for 4 records)  
Students Class Schedules (for ...  
Students Class Schedules (for ...  
Students Class Schedules (for ...



## Search

Search provides access to a custom search specific to communication related data in the system. Things like email or messages or texts can be easily found from among the hundreds of thousands that exist inside a specific instance.



union fusion

connect | communicate | collaborate

Logged on as Matthew Hudson  
Messages (0) | My Profile | Settings | Logout

Dashboard
Documents
Contacts
Membership
Financial
Out-of-Work List
Organizing
CMS
Reporting
Admin
My Employment

Queries
Templates
Search
History
Settings

## Communication Search

Modify Search

▼

Search Results - default filter

Search text:

Search method:

Exact phrase ▼

Search For:

Subject, Body ▼

Search For:

Notes ▼

Note/task type:

▼

Date range:

▼

▼

Related to (type):

▼

Related to (name):

[Advanced search](#)

Search

Reset

Author	Subject	Body Summary	Related To	Created ▼	Type
<a href="#">Brenda C. Davidson</a>	Called	I called <a href="#">Brenda</a> on 1-5-2015 to let him know about his dues. I called hi...	<a href="#">Revenue - Request</a>	1/15/15	
<a href="#">Brenda C. Davidson</a>	Call In	Called in about Craigslist Add. He said he&#39;s taking classes at ETI and...	<a href="#">Revenue - Request</a>	1/15/15	
<a href="#">Brenda C. Davidson</a>		1-15-15 sent expelled letter	<a href="#">Revenue - Request</a>	1/15/15	

Search

(hide sidebar)

Go

Quick Links

(add | manage)

[Communication Search](#)  
[Membership Classification By Year](#)  
[Membership Classification Chart](#)  
[Tutorials](#)

Help

(show tooltips)

[Help with this page](#)  
[Help / Forums](#)  
[Submit a Request](#)

Recent Reports

(show all)

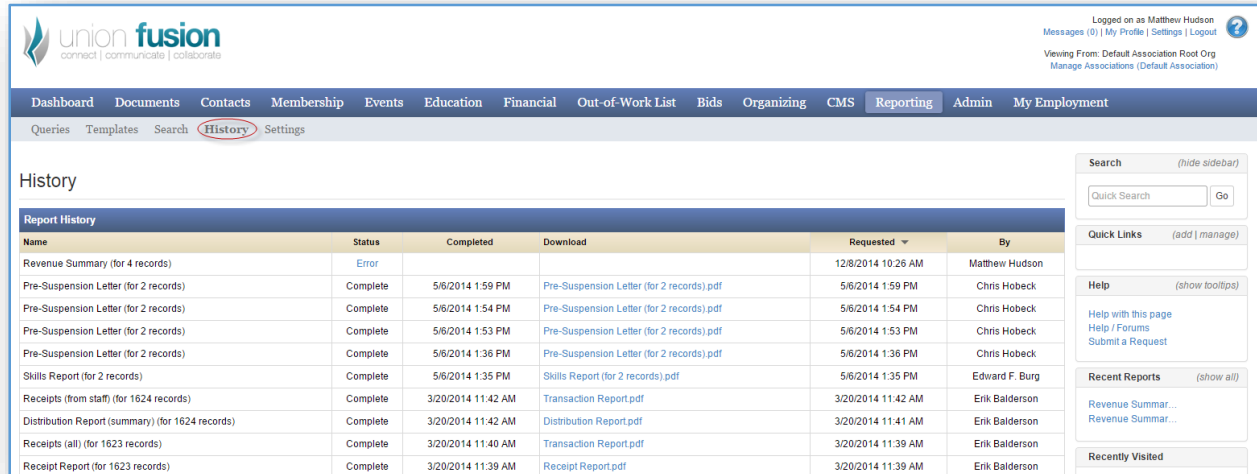
[Revenue Summar...](#)  
[Revenue Summar...](#)

Recently Visited

[View all history](#)  
[Responses to Website](#)  
[Matthew Hudson](#)  
[Brendon Foster](#)

## History

The history 2<sup>nd</sup> level menu provides access to reports specifically run by the user who is currently logged in. These are presented in descending order and provide access to pull an older report that had been run.



The screenshot shows the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, Admin, and My Employment. The 'History' link is highlighted. Below the navigation bar, the 'History' section is displayed, featuring a table of report history. The table has columns for Name, Status, Completed, Download, Requested, and By. The reports are listed in descending order of completion date. On the right side of the page, there are sections for Search, Quick Links, Help, Recent Reports, and Recently Visited.

Name	Status	Completed	Download	Requested	By
Revenue Summary (for 4 records)	Error			12/8/2014 10:26 AM	Matthew Hudson
Pre-Suspension Letter (for 2 records)	Complete	5/6/2014 1:59 PM	<a href="#">Pre-Suspension Letter (for 2 records).pdf</a>	5/6/2014 1:59 PM	Chris Hobeck
Pre-Suspension Letter (for 2 records)	Complete	5/6/2014 1:54 PM	<a href="#">Pre-Suspension Letter (for 2 records).pdf</a>	5/6/2014 1:54 PM	Chris Hobeck
Pre-Suspension Letter (for 2 records)	Complete	5/6/2014 1:53 PM	<a href="#">Pre-Suspension Letter (for 2 records).pdf</a>	5/6/2014 1:53 PM	Chris Hobeck
Pre-Suspension Letter (for 2 records)	Complete	5/6/2014 1:36 PM	<a href="#">Pre-Suspension Letter (for 2 records).pdf</a>	5/6/2014 1:36 PM	Chris Hobeck
Skills Report (for 2 records)	Complete	5/6/2014 1:35 PM	<a href="#">Skills Report (for 2 records).pdf</a>	5/6/2014 1:35 PM	Edward F. Burg
Receipts (from staff) (for 1624 records)	Complete	3/20/2014 11:42 AM	<a href="#">Transaction Report.pdf</a>	3/20/2014 11:42 AM	Erik Balderson
Distribution Report (summary) (for 1624 records)	Complete	3/20/2014 11:42 AM	<a href="#">Distribution Report.pdf</a>	3/20/2014 11:41 AM	Erik Balderson
Receipts (all) (for 1623 records)	Complete	3/20/2014 11:40 AM	<a href="#">Transaction Report.pdf</a>	3/20/2014 11:39 AM	Erik Balderson
Receipt Report (for 1623 records)	Complete	3/20/2014 11:39 AM	<a href="#">Receipt Report.pdf</a>	3/20/2014 11:39 AM	Erik Balderson

## Settings

The settings tab is a configuration tab specific to the reporting module in Union Fusion. All of the settings found in this menu provide user level configuration to report output or organization name and address that may come out standard on many reports.

The screenshot shows the Union Fusion web application interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting (highlighted), Admin, and My Employment. Below this, a sub-navigation bar contains Queries, Templates, Search, History, and Settings (circled in red). The main content area is titled 'Reporting Settings' with a 'General' tab selected. The 'General Settings' section contains a 'General' sub-section with the following fields: Administrator name, Administrator title, Organization name, Address, Email address, Phone number, Fax number, Organization number, Header image (with a 'Select File' button), Square logo image (with a 'Select File' button), Administrator signature (with a 'Select File' button), and Report text (with checkboxes for 'Disable system rendered letter head text' and 'Disable envelope return address'). The right sidebar contains a Search bar, Quick Links, Help, Recent Reports, Change History, and Recently Visited sections.

union fusion  
connect | communicate | collaborate

Logged on as Matthew Hudson  
Messages (0) | My Profile | Settings | Logout  
Viewing From: Default Association Root Org  
Manage Associations (Default Association)

Dashboard Documents Contacts Membership Events Education Financial Out-of-Work List Bids Organizing CMS Reporting Admin My Employment

Queries Templates Search History Settings

### Reporting Settings General

General Financial Education

#### General Settings

**General:**

These settings are displayed in system reports. These information does not replace your organization's company info.

Administrator name:

Administrator title:

Organization name:

Address:

Email address:

Phone number:

Fax number:

Organization number:

Header image:   
We recommend that you upload a 1000x175 pixel image for best results.

Square logo image:   
We recommend that you upload a 300x300 pixel or larger image for best results.

Administrator signature:

Report text: ☐ Disable system rendered letter head text  
☐ Disable envelope return address

Search (hide sidebar)  
Quick Search  Go

Quick Links (add | manage)

Help (show tooltips)  
Help with this page  
Help / Forums  
Submit a Request

Recent Reports (show all)  
Revenue Summar...  
Revenue Summar...

Change History  
Created: 11/9/2012 2:38:28 PM  
by Joel Potter  
Last Modified: 12/9/2014  
12:20:04 AM by system User

Recently Visited  
Gary D Hunter  
Raymond W Wilson  
Christopher J Townsend  
Matthew Hudson  
Brendon Foster

## ADMIN

The administrative module, as its name implies, provides a key location for staff personnel to administer the Union Fusion solution to their organization. The module itself should only be available to key staff as the solution is fairly exposed to those personnel that have access.

The screenshot displays the Union Fusion Admin interface. The top navigation bar includes links for Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, Admin (highlighted), and My Employment. A secondary navigation bar lists Security (highlighted), System Settings, Organizational Settings, References, Utilities, Subscriptions, and Change History. The main content area is titled 'Users' and features a table of user accounts. The table columns are Full Name, User Name, Last Login, Date Entered, Lock, Temp, and Inactive. The table lists 14 users, with the first user, Burg, Ed, highlighted in yellow. To the right of the table, there are sections for Search, Quick Links, Help, Recent Reports, and Recently Visited. The bottom of the page shows a footer with the text 'A Data Research Group Application © 2015' and the date '1/14/2015 8:06 PM EST | v 1.26 | rev'.

Logged on as Matthew Hudson  
Messages (0) | My Profile | Settings | Logout  
Viewing From: Default Association Root Org  
Manage Associations (Default Association)

Dashboard Documents Contacts Membership Events Education Financial Out-of-Work List Bids Organizing CMS Reporting Admin My Employment

Security System Settings Organizational Settings References Utilities Subscriptions Change History

### Users

[+ New User](#) [Lock/Unlock](#) [Reset Password](#)

Users - default filter

	Full Name	User Name	Last Login	Date Entered	Lock	Temp	Inactive
<input type="checkbox"/>	Burg, Ed	edb-default@datarg.com	1/15/2015	1/13/2015			
<input type="checkbox"/>	Potter, Joel	joelp@datarg.com	1/16/2015	11/8/2011			
<input type="checkbox"/>	Balderson, Erik	erikb@datarg.com	1/15/2015	11/11/2011			
<input type="checkbox"/>	Burg, Edward F.	edb@datarg.com	1/14/2015	11/16/2011			
<input type="checkbox"/>	Hynes, Jonathan	jonh@datarg.com	12/31/2014	11/18/2011			
<input type="checkbox"/>	Foster, Brad	bfoster@datarg.com	12/29/2014	9/13/2012			
<input type="checkbox"/>	F, Kim	kimf@datarg.com	1/8/2015	10/29/2012			
<input type="checkbox"/>	B, Camille	camilleb@datarg.com		1/4/2013		✓	
<input type="checkbox"/>	Hody, Dan	danh@datarg.com	1/16/2015	2/21/2013			
<input type="checkbox"/>	Foster, Brad	bradt@datarg.com	1/7/2015	4/9/2013			
<input type="checkbox"/>	Hobeck, Chris	chrish@datarg.com	5/15/2014	4/25/2013	✓		
<input type="checkbox"/>	Foster, Brendon	brendonf@datarg.com	1/16/2015	5/7/2013			
<input type="checkbox"/>	Witteborg, Ivan	ivanw@datarg.com	5/29/2014	5/22/2014			
<input type="checkbox"/>	Hudson, Matthew	matthewh@datarg.com	1/16/2015	10/1/2014			

Records 1 through 14 of 14

<< Previous Page 1 of 1 Next >>

A Data Research Group Application © 2015  
1/14/2015 8:06 PM EST | v 1.26 | rev

Search (hide sidebar)  
Quick Search Go

Quick Links (add | manage)

Help (show tooltips)  
Help with this page  
Help / Forums  
Submit a Request

Recent Reports (show all)  
Revenue Summar...  
Revenue Summar...

Recently Visited  
Default Association Root Org  
New /1/14/2015  
Revenue /1/14/2015  
Organization /1/14/2015  
Matthew Hudson

## Security

The security architecture is made up of 3 important parts to understand the security paradigm in Union Fusion: Users, Groups, and Permissions. For the most part we have adopted a model similar to Microsoft based security system where users can belong to groups and both users and groups can have related permissions. While users can have their own permissions, it is highly recommend to place users in groups and only assign permissions to groups. This will minimize the overall management of security in the system.

The permissions model will inherit from parent objects unless a specific function or 2<sup>nd</sup> level menu is intentionally denied. The permissions themselves work from standard database activities including: create, read, update and delete to nearly all of the objects in the framework. The system is very granular in granting permissions and therefore permissions can be highly customized to select groups.

The screenshot displays the Union Fusion user interface. At the top, the logo 'union fusion' is visible with the tagline 'connect | communicate | collaborate'. The user is logged in as Matthew Hudson, with links for Messages (0), My Profile, Settings, and Logout. The current view is 'Default Association Root Org' with a link to 'Manage Associations (Default Association)'. The main navigation bar includes Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, Admin, and My Employment. A sub-navigation bar highlights 'Security' and includes System Settings, Organizational Settings, References, Utilities, Subscriptions, and Change History. The user profile for 'Ed Burg' is shown, with tabs for 'User Profile' and 'Contact Profile'. The 'User Profile' tab is active, displaying 'Personal Info' and 'User Info'. The 'Personal Info' section includes a profile picture, name, email, record status (Active), organization (Default Association Root Org), region, job classification, person status, and contact groups. The 'User Info' section includes user ID (60531012), username (edb-default@datarg.com), organization (Default Association Root Org), job title, date entered (1/13/2015), and last login (1/15/2015). Below the profile information are buttons for 'Add Group' and 'Remove Groups'. The 'Groups' section shows a table with one row: 'Default Administrator Group'. The bottom of the page shows pagination: 'Records 1 through 1 of 1' and '<< Previous Page 1 of 1 Next >>'. The right sidebar contains a search bar, quick links, help, recent reports, change history, notes, and recently visited.

## System & Organizational Settings

At a high level these options are simply configuration settings designed to apply to the framework as a whole. As with other 'settings' menus throughout the system, access should be guarded. Sample options in these sections include, company name and address, default response settings on automated emails, industry codes and terminology and much more.

The image displays two screenshots of the Union Fusion web application interface. The top screenshot shows the 'Organizational Settings' page, which is part of the 'Admin' section. The page has a sidebar with navigation links: Dashboard, Documents, Contacts, Membership, Events, Education, Financial, Out-of-Work List, Bids, Organizing, CMS, Reporting, Admin, and My Employment. The 'Organizational Settings' page is divided into several sections: General, Communications, Other, Reporting, and Miscellaneous. The General section includes a dropdown for 'Homepage custom content page' and checkboxes for 'Allow child orgs to override homepage' and 'Override dashboard with homepage'. The Communications section includes text input fields for 'Email "reply to" address' and 'Email "from" name'. The Other section includes text input fields for 'Home link url' and 'Home link text', and checkboxes for 'Only staff may edit pictures' and 'Only staff may edit personal info'. The Reporting section includes a checkbox for 'Use Employer OJT Hours on system reports'. The Miscellaneous section includes a checkbox for 'Staff can edit funds collected on employee hours'. There are 'Save Settings' and 'Cancel' buttons at the bottom. The bottom screenshot shows the 'System Settings' page, which is also part of the 'Admin' section. It has a similar sidebar. The 'System Settings' page is divided into sections: General, System Settings, and Mobile Apps. The General section includes a text input field for 'Break login message' and a dropdown for 'Break login message'. The System Settings section includes text input fields for 'System email from name', 'System email reply address', and 'System email footer'. The Mobile Apps section includes text input fields for 'App ID' and 'App Key'. There is a 'Save Settings' button at the bottom. Both screenshots show a user logged in as 'Matthew Hudson' and a 'Viewing From: Default Association Root Org' message.

## References

The references grid provides organizational level access to control the values that appear in drop down boxes across the entire system framework. These are typically established when systems are initially set up and configured. As with other configuration modules or menus, guidance by experienced personnel is necessary in order to achieve good results.

The image shows two screenshots of the Union Fusion web application. The top screenshot displays the 'References' page, which lists various reference types and their categories. A red arrow points from the 'Phone Type' entry in the 'Reference Types' table to the bottom screenshot. The bottom screenshot shows the 'Reference Values: Phone Type' page, which displays a table of phone type values.

**Reference Types**

Type	Category
Address Type	Contacts
Email Address Type	Contacts
Phone Type	Contacts
Company Type	Contacts
Employment Contact Type	Contacts
Group Type	Contacts
Occupation	Contacts
Person Relationship Type	Contacts
Person Status	Contacts
Company Status	Contacts
Job Classification	Contacts
Ethnicity	Contacts
Education Level	Contacts
Employment Type	Contacts
Certification Category	Contacts
Skill	Contacts
Referral Category	Contacts
Reporting Category	Contacts
Degree Type	Contacts

**Reference Values: Phone Type**

Reference Value	Value
Cell	Default Association Root Org
Home	Default Association Root Org
Work	Default Association Root Org