

Data Cleansing in preparation for Ballots

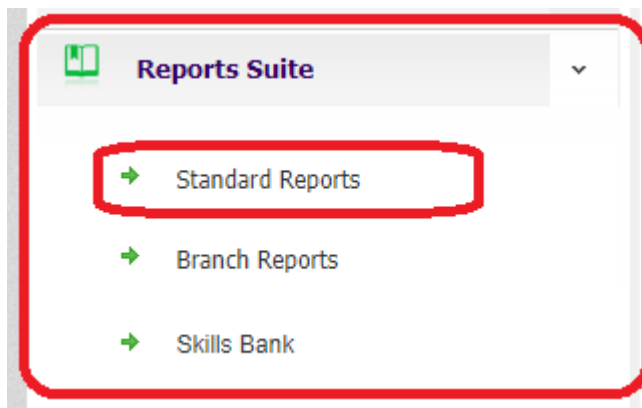
Introduction

There are several reports within WARMS designed to assist branches with the preparation for Industrial Action ballots. It is vital that the member record contains a valid home address and that the workplace name and job title are accurate.

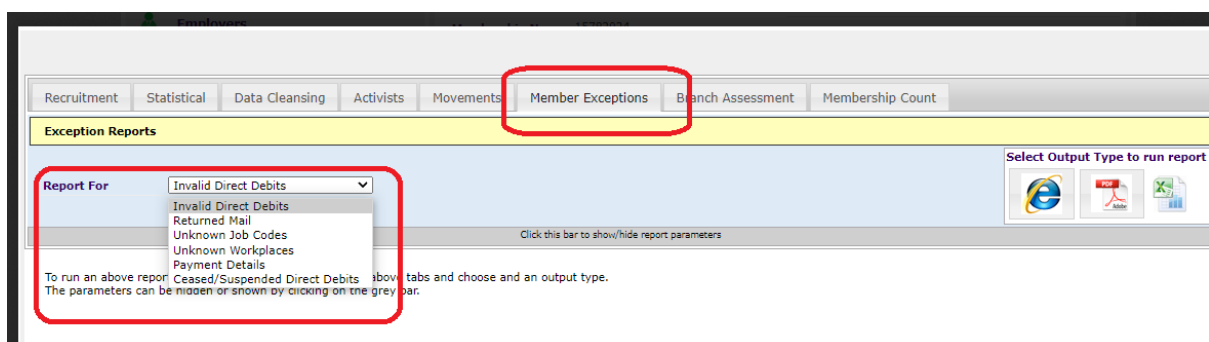
This document is to provide some guidance on how to use WARMS to prepare for Industrial Action.

How to run the reports

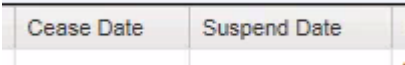
1. From WARMS dashboard go to Report Suite/Standard Reports




2. Select the tab called "Member Exceptions"



3. The "Report For" drop down will list the different reports available and the table below summarises the information and action required:

Report	Information	Action
<p>Invalid Direct Debits This report lists all members where the direct debit is not currently active.</p> <p><i>Please note - This also lists members on Cycle 3 (Last working day of the month) and no action is needed for these members.</i></p>	<ul style="list-style-type: none"> Members who have cancelled their DD (Cease date is present) Members where there has been a rejection (Suspend date is present) Members on cycle3 and we have not collected their first sub yet will be listed (no action is needed for these members) 	<p>From Standard Reports/Member Exception reports generate the “Invalid Direct Debits” Report</p> <ul style="list-style-type: none"> Filter the list to show members with a cease date or suspend date.  <ul style="list-style-type: none"> Contact these members to advise the UNISON direct debit has stopped and the subscription will not be taken without the member updating their details Advise the member to contact UNISONdirect or register/login to My UNISON if still want pay subscriptions via Direct Debit If member wants to pay via DOCAS send out Application form as a Mandate For further information/help speak to your regional membership team
<p>Members with Returned Mail Ensure all members in the ballot have a valid home address, i.e. no returned mail.</p>	<ul style="list-style-type: none"> Are there any members in these employers where we have returned mail? Are there any members in this ballot where we have blank addresses? 	<p>From Standard Reports/Member Exception reports generate the “Members with Returned Mail” Report</p> <p>Members with returned mail will be automatically excluded from the ballot</p>

		<ul style="list-style-type: none"> • Make phone, email or personal contact with all members on this list to get a valid home address. Update WARMS or advise member to log in to My UNISON to update their own details or to contact UNISON Direct. • Update WARMS using the document 'Maintaining Process AmendW10'.
<p>Unknown Workplaces Ensure all members have a valid workplace and none have "unknown".</p>	<ul style="list-style-type: none"> • Are there any members with unknown workplace? 	<p>From Standard Reports/Member Exception reports generate the "Unknown Workplaces" report</p> <ul style="list-style-type: none"> • Review against employer. If a DOCAS file has this information, use that to update WARMS. • <i>Contact the member directly to confirm their workplace name/address and update the member's workplace</i> • Members with unknown workplaces will be automatically excluded from the ballot.
<p>Workplace at Home Is this the member's actual workplace?</p>	<ul style="list-style-type: none"> • Do members have this selected on their record? 	<p>From Branch Members, select Employer/Workplace Tab. In Workplace field search on keywords "Workplace at Home" click Search</p> <ul style="list-style-type: none"> • <i>Contact the member directly to confirm their workplace and update if incorrect.</i> • UNISON can be challenged if this data is not correct

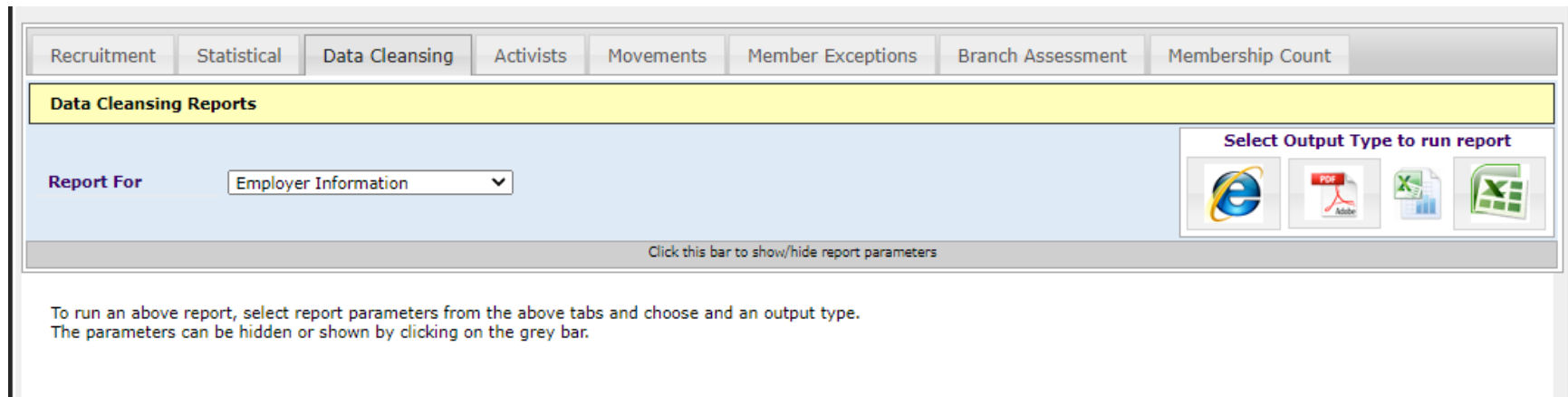
<p>Unknown Job Codes Ensure all members have a job code and none have “unknown”.</p>	<ul style="list-style-type: none"> Are there any members with unknown job title? 	<p>From Standard Reports/Member Exception reports generate the “Unknown Job Code” report</p> <ul style="list-style-type: none"> Review against employer job structure. If the DOCAS file contains this information, use that to update WARMS. Contact the member directly to confirm their job title and update the member record to reflect this. If a new Job Code and Description is required, then email RMS Operations rmsadmin@unison.co.uk . <p>Members with unknown job codes will be automatically excluded from the ballot.</p>
<p>Payment Details Ensure cash/cheque payments are up to date</p>	<ul style="list-style-type: none"> Members paying via Cash or Cheque 	<p>From Standard Reports/Member Exception reports generate the “Payment Details” Report</p> <p>Follow MAC process guidance Leavers Members who pay direct to branch (LeaveW01) Available within WARMS help and the WARMS Knowledge Base.</p> <p>Regions are responsible for checking members who pay to the region or national office.</p>

<p>Cancel/Suspended Direct Debits</p> <p>These members would also be included in the Invalid Direct Debit report.</p>	<ul style="list-style-type: none"> • DD Members that have ceased or suspended their payment in the last week but are still current members 	<p>From Standard Reports/Member Exception reports generate the “Cancel/Suspended Direct Debits” Report</p> <ul style="list-style-type: none"> • Contact these members to advise the UNISON direct debit has stopped and the subscription will not be taken without the member updating their details • Advise the member to contact UNISONDirect or register/login to My UNISON if still want pay via Direct Debit
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Employer and Workplace Information

It is important to review the Employer/Workplace names and addresses are correct and a ballot contact email address is recorded for each employer.

There are two reports under Standard Reports/Data Cleansing:



The “Report For” drop down list has several reports and the table below summarises the information and action required:





Report	Information	Action
Employer Information	<ul style="list-style-type: none"> Check to ensure that we have the correct Employer Name. 	From Standard Reports/Data Cleansing reports generate the “Employer Information” Report

		<p>The employer can challenge the ballot if this is incorrect</p> <p>If Name, or Address, is incorrect</p> <ul style="list-style-type: none"> • contact the region who can then arrange for this to be amended/new employer created • Provide the regional membership team with the correct ballot contact email address for the employer. <i>The region will need to update this information within RMS Ballot Contact Details</i>
<p>Workplace Information</p>	<ul style="list-style-type: none"> • Check the Workplace Name is correct 	<p>From Standard Reports/Data Cleansing reports generate the “Workplace Information” Report</p> <p>An employer can challenge a ballot if the workplace details are wrong i.e. the workplace no longer exists or can’t be identified by the employer.</p> <p>The workplace names of any direct debit members within the ballot are listed on the page 2 report.</p> <p>You can only update workplaces where all the members are in your branch and there are none in any other branch.</p> <p>If a workplace has changed name, a new workplace should be created to ensure the</p>

		<p>historical data is maintained. Once the new workplace has been created, transfer the members and close the old workplace code.</p> <p>Any queries contact the region for advice or if more than 10 members need transferred to a new workplace</p>
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Outputs for Reports

There are 4 different output types for each of the reports:

	Will display the report to your screen
	Will download the report as a PDF
	Will download the report as Excel 2007
	Will download the report as Excel 2002




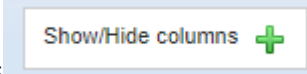
For this example, If I select

You will see the following fields along with the relevant member data on the screen

Recruitment	Statistical	Data Cleansing	Activists	Movements	Member Exceptions	Branch Assessment	Membership Count				
<small>Click this bar to show/hide report parameters</small>											
Member Record Exceptions Report - Members DD Exceptions Branch: <input type="text"/>											
Sort Order: Member Surname											
<small>Note: The arrears value represents the last recorded value, as updated last night. You will need to re-check individual members' records for the most up to date figure.</small>											
Member ID	Full Name	Payment Band	Freq	Cease Date	Suspend Date	Date Last Paid	Date Last Rejected	Arrears	Bank Sort Code	Bank Account	DD Signature
.....

How to search and review membership data

To review the data held for direct debit members please follow these steps:

1. Select Branch Members 
2. Select Show/Hide Columns 

- Untick the fields for address, NI Number and select Employer, Workplace and Job as shown below

Branch Members List

Category	Date Entered	Employer/Workplace	Job Title	Payment	Personal	Position
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Show/Hide columns

Address Line 1	<input type="checkbox"/>	Ethnic Origin	<input type="checkbox"/>	Payroll	<input type="checkbox"/>
Bargaining Group	<input type="checkbox"/>	Full Name	<input checked="" type="checkbox"/>	Political Fund	<input type="checkbox"/>
Campaign Code	<input type="checkbox"/>	Gender	<input type="checkbox"/>	Position	<input type="checkbox"/>
Campaign Ranking	<input type="checkbox"/>	Home Phone	<input type="checkbox"/>	Postcode	<input type="checkbox"/>
Category	<input type="checkbox"/>	Mobile Phone	<input type="checkbox"/>	Recruited By	<input type="checkbox"/>
Committees	<input type="checkbox"/>	Job	<input checked="" type="checkbox"/>	Recruitment Initiative	<input type="checkbox"/>
Contact Phone	<input type="checkbox"/>	Mail Returned Date	<input type="checkbox"/>	Specific Fields	<input type="checkbox"/>
Date of Birth	<input type="checkbox"/>	Member ID	<input checked="" type="checkbox"/>	Status Date	<input type="checkbox"/>
Date Entered Office	<input type="checkbox"/>	NI Number	<input type="checkbox"/>	Town	<input type="checkbox"/>
Disabled Members	<input type="checkbox"/>	Payment Band	<input type="checkbox"/>	Work Phone	<input type="checkbox"/>
Email	<input type="checkbox"/>	Payment Method	<input type="checkbox"/>	Workplace[Code]/Type	<input checked="" type="checkbox"/>
Employer[Code]/Type	<input checked="" type="checkbox"/>				

Show entries

Showing 1 to 10 of 119 entries

M'Ship No	Full Name	Employer[Code]/Type	Workplace[Code]/Type	Job
Abberley				

- Within the category tab select Full members

Branch Members List

Category	Date Entered	Employer/Workplace	Job Title	Payment	Personal	Position
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Category

1 selected

Check all Uncheck all

Full

Honorary

Show/Hide columns

5. Within the payment tab select Direct Debit

The screenshot shows the 'Branch Members List' interface. At the top, there are tabs for 'Category', 'Date Entered', 'Employer/Workplace', 'Job Title', 'Payment', 'Personal', and 'Position'. The 'Payment' tab is active. Below the tabs, there are several filter sections: 'Payment method' (set to '1 selected'), 'Payment band', 'Show/Hide columns', and 'Address Line 1'. A dropdown menu is open over the 'Payment method' section, showing options: 'Cheque', 'Credit Card', 'Direct Credit Rejections', and 'Direct Debit' (which is checked). At the top of this menu are 'Check all' and 'Uncheck all' options. To the right of the filters, there is a 'Search' button, a 'Restore Default Columns' button, and a 'Close' button. At the bottom right, there is a 'Payroll' checkbox.

6. Within the Employer/Workplace tab you can search for specific employers or workplace

The screenshot shows the 'Branch Members List' interface with the 'Employer/Workplace' tab selected. The tabs at the top are 'Category', 'Date Entered', 'Employer/Workplace', 'Job Title', 'Payment', 'Personal', and 'Position'. Below the tabs, there are several filter sections: 'Employer Type' (dropdown), 'Employer' (radio buttons for 'Include' and 'Exclude'), 'Primary Employer Category' (dropdown), 'Lead Service Group' (dropdown), 'Workplace Type' (dropdown), and 'Workplace' (radio buttons for 'Include' and 'Exclude'). A 'Search' button is located to the right of the 'Workplace' section. The 'Include' radio button is selected for both 'Employer' and 'Workplace'.

7. Press  to filter the members

8. You can either view the information on screen or if you'd like to export this to CSV you can

The screenshot shows a button labeled 'Output Options' with a circular arrow icon next to it. The button is highlighted with a blue border.

select

9. Enter a Description for why you are extracting the data

10. Select

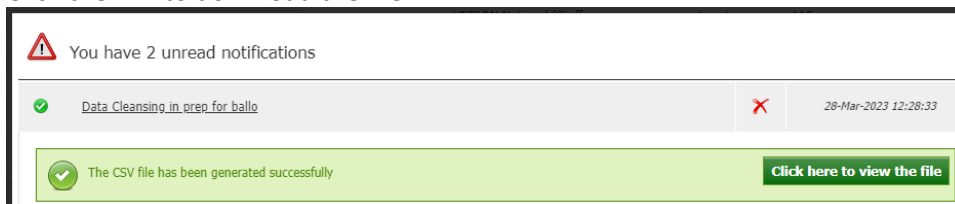


11. Once the file has produced you will receive a notification



12. Press the notification red box

13. Click the link to download the file.

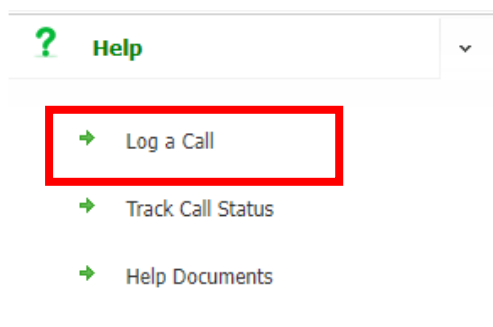


Support and Assistance

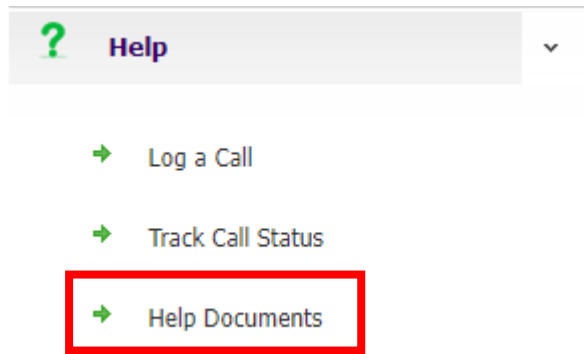
If you have any queries regarding how to use WARMS, support is available.

Expand the Help Menu and select Log a call.

Enter the details of your query and a member of the WARMS Support Team will be in touch.



Alternatively, there are a number of step-by-step guides within the WARMS knowledge base which can be access by selecting Help Documents within the WARMS Help Menu.



If your query is related to data, please contact your regional membership team.