System Capabilities – HRC-Live compared to MMDB – as of 17 July 2020

System Capability	HRC-Live	MMDB
1. Entry Security	User enters a valid name for access to Main Menu.	User enters a valid username and password for access to Main Menu. There is a separate window for changing password.
2. System Navigation	Main Menu for navigation to system functions.	Main Menu for navigation to system functions.
3. Maintain Member Data	User clicks a button on Main Menu to open Add/Change form.	User clicks one button to open Add New Member window, or a different button to open the Change Member Data window.
3.1 Add a new member to database	User enters data in a blank form and clicks Save button. All data items are on the screen including comments.	User enters data in a blank window and clicks the Save button. All data items are on the screen. A comment is added automatically.
3.2 Change member data	User selects current member name from drop-down list. Current data is displayed on form. User updates any data, adds a comment, and clicks Save button.	User selects a current member from a drop-down list. Current data is displayed in the window. User updates any data including adding a new comment and clicks the Save Button.
3.3 Add a year to subscription for paper subscribers	User clicks a button to add a year to paper newsletter subscription.	Manual change to expiration date.
3.4 Delete a record from database	User clicks a button on form to remove record from database.	Not required for basic system. Possible in future.
3.5 Print a member	User clicks a button on form to send selected data to a printer.	No action yet. However as soon as we get our 3-D printer, we will be able to actually 3-D print a member.
3.6 Attach files to member (photos, obituaries, email subscribes, email unsubscribes)	User can add an attachment to the list on the right side of the form.	Data grid box displays the file name of attachments. A button near the attachment box allows user to select an attachment and open the file. Another button allows the user to enter the name of a new file in a text box and save that to the member record.
4. Produce Member Directory	User clicks a button on Main Menu to produce a report including member names, spouse names, addresses, and phone numbers.	User selects Member Directory in Report Viewer to produce the report. Includes same data as HRC-Live.
5. Birthday Reporting		
5.1 Accept Month Number for Birthday Reports	User clicks a button on Main Menu to open form for entering and saving the birthday month number.	User clicks Report Support button from Main Menu to select a date and populate a table that supplies the data to both the “Call” and “Newsletter” reports.
5.2 Produce birthday report supporting phone calls	User clicks a button on Main Menu to generate a report that supports birthday calls.	User selects BirthdayCallList in Report Viewer to produce the report. The report can be saved as a PDF file for distribution.

5.3 Produce birthday listing for newsletter	User clicks a button on Main Menu to generate a report that supports the birthday list in the newsletter.	User selects BirthdayNewsletterList in Report Viewer to produce the report. The report can be saved as a text file for distribution.
6. Paper Newsletter Mailing Labels	User clicks a button on Main Menu starting a process that scans the database for members with a current paper newsletter subscription and formats a mailing label for each such member.	User selects MailingLabels in Report Viewer to produce a report showing the labels. User exports the report in PDF format. User opens the Avery5160 template and performs a copy/paste from the report to the template before printing.
7. Paper Newsletter Expiration Notices	User clicks a button on Main Menu starting a process that scans the database for members nearing the end of their paper subscription. A notice is printed for each such member.	User selects ExpireNotice in Report Viewer to produce a report showing the notices for all subscribers. Print the report. User selects those pages to use for this month.
8. Report Member Email Addresses	User clicks a button on Main Menu to generate a report of member names, addresses and email addresses.	Redundant, no longer used, requirement dropped.
9. Produce MVA Members Report	User clicks a button on Main Menu to generate a report of members with an “Active” status code.	User selects MVAActiveMembers in Report Viewer to produce the report.
10. Maintain Authorized User List	Provides the ability for new users to be added to the authorized user list.	No action yet. Manual maintenance at beginning.
11. Copy Member Data to Excel	User clicks a button on Main Menu starting a query of the member data table, saving the results in an Excel file. There is no ability to choose which data is saved.	Not required for basic system.
12. Produce New Member Report	User clicks a button on the Main Menu, enters a date for limiting the query, and receives a report of members with Join Date since that date.	User selects NewMemberReport in Report Viewer to start report process. System will ask for a date to use to limit results. User enters a new format date (yyyy-mm-dd) to produce the report.
13. Produce Data Revisions Report	User clicks a button on the Main Menu, enters a date for limiting the query, and receives a report of each data item that has been changed since that date, sorted by member name.	User selects RevisionsReport in Report Viewer to start report process. System will ask for a date to use to limit results. User enters a new format date (yyyy-mm-dd) to produce the report.
14. Produce Second Address Report	User clicks a button on the Main Menu to generate a report of second addresses for all members and their address effective dates.	No longer a requirement. System does not have second addresses.
15. Produce Deceased Member Report	User clicks a button on the Main Menu, enters a date for limiting the query, and receives a report of members with deceased dates since that date.	This is now a 2-step process, one for members and one for spouses. Both work the same way. User selects either DeceasedRptMember or DeceasedRptSpouse to start the process. The system will ask for a date to use to limit the results. User enters a new format date (yyyy-mm-dd) to produce the report. Repeat for the second report.

16. Produce email newsletter subscriber list	User clicks a button on the Main Menu to produce a listing of members with the email-newsletter box checked, and their email addresses.	This is now a 2-step process, one for members and one for spouses. Both work the same way. User selects either EmailForNewsletterMember or EmailForNewsletterSpouse to start the process. Export the results to Excel. Repeat for the second report and combine with first list to compare to MailChimp records.
17. Exit the System	To prevent possible data integrity issues, there is only one way to exit the system – by navigating to the Main Menu and clicking the Stop button.	To prevent possible data integrity issues, there is only one way to exit the system – by navigating to the Main Menu and clicking the Exit button. There are close boxes on each window, which redirect the user to the Main Menu.
18. Maintain the Office Log	User clicks a button on Main Menu to open Office Log Menu.	User clicks a button on Main Menu to open Office Log window. All action happens in this window.
18.1 Maintain Log Entries	User clicks a button on Log Menu to open Add/Change Log Entries form.	No intermediate menu, user goes directly to the Log Entry window.
18.1.1 Add a new log entry	User enters log entry data on a blank form and saves the entry to the database.	User enters log entry data in the blank window and clicks the Save button.
18.1.2 Change a previously saved log entry	User manually searches for previously saved log entry, then makes the changes to data and saves the record.	User searches for previously saved log entry from a drop-down list, clicks a button to select the entry and the entry is displayed. User makes changes and clicks the Save button.
18.1.3 Attach external files to a log entry	User can add an attachment to the list on the right side of the form.	No action yet. Little used function (not since 2018).
18.1.4 Add all 4 required entries for a worker shift	User clicks a button on the Office Log form to add four records to the log table, one for each of the four required tasks for each office shift (email, paper mail, phone messages, phone calls).	No action yet. At this point, I don't know if there will be an office for this to apply to.
18.1.5 Navigate through the log entry table one record at a time	User can click a button to go to the previous log entry, or a different button to go to the next log entry.	No longer required. User can select any previous entry from the drop-down list of all entries.
18.2 Produce a listing of future actions	User clicks a button on the Office Log Menu to produce a listing of log entries with the Future Action box checked and the Future Action Complete box not checked.	No action yet.
18.3 Produce a log entry report	User clicks a button on the Office Log Menu to generate a report of all log entries. The report can be viewed on screen or sent to printer.	User selects OfficeLogReport in Report Viewer to start report process. System will ask for a date and time to use to limit results. User enters a new format date and time (yyyy-mm-dd hh:mm) to produce the report.

Other Notes: HRC-Live retiree master table was loaded into MMDB. HRC-Live comments table was loaded into MMDB. HRC-Live revisions table was loaded into MMDB. HRC-Live office log table was partially loaded into MMDB. (Due to frequent use of the "return" character in log entries causing a load error, only current year entries were loaded.)