

# Porsche Club of America

## PCA iMIS Database - Membership CSV File Field Definitions

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## Revision History

Date	Change
8/27/2004	Initial version.
8/28/2004	Typo – “AM” is CATEGORY Affiliate, not Associate.
8/31/2004	Revised definitions of <i>RENEWED_THRU</i> and <i>PAID_THRU</i> based on new information from Executive Secretary. Added chronological Status sequence information.
9/3/2004	Revise document to reflect contents of the distributed membership CSV files
9/5/2004	Add information regarding address fields
9/8/2004	Revise terminology regarding members to reflect PCA Bylaw official language
9/24/2004	Correct example of non-renewal status code sequence
11/12/2004	Added anniversary_date; revised join_date
11/14/2004	Clarified membership number of affiliate who converts to primary
12/3/2004	Added name field <i>DESIGNATION</i> information
1/26/2005	Added documentation for new monthly transaction file data
2/4/2005	Adjustments to transaction file documentation
4/5/2005	Added info on member numbers starting with 1900 and 1500; suggestions on how to use CSV files for member management
4/6/2005	Tweaked to address how to count members, and how to identify new members.
7/7/2005	Updated transaction file information.
5/17/2006	Remove definitions for bad Category codes – data has been cleansed
1/31/2007	Added Quest member type.
4/21/2008	Corrected data_date field name.
5/15/2008	Change 60 days to 2 months – related database changes have been made.

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## Overview

In mid-2004, the PCA National membership record management system was switched from a home-grown software application to a professional one with greatly expanded capabilities. The new system is called iMIS and is a product of Advanced Solutions International (ASI). ASI's web site is <http://www.advsol.com/>.

An optional module for iMIS, called eSeries, adds a web-based interface for direct member use of the management system, for routine activities such as renewals, joining, event signup, record updates, etc. eSeries installation is under way at PCA and expected to complete before year's end. Once this module is made available on the internet, PCA members and volunteers will enter a whole new world of information access and records management ease.

In the interim, the PCA National Office still produces and sends each region's membership roster on a monthly basis. Regional membership volunteers use this information to manage their roster as well as other functions like renewal reminders, welcoming letters, etc.

The advent of iMIS brought a significant change to the record storage format. Additionally, all reports had to be recreated from scratch using existing reports as a partial – but incomplete – specification. These reports and the monthly roster were implemented by the National Office staff.

This document details the usage of certain fields in the database which should be used by regions and other parties in the manipulation of the data. The facts presented here were determined by reverse-engineering the actual entire iMIS database consisting of over 200,000 records. While these facts are believed to be accurate, it is possible that the interpretation of existing data may be imperfect.

## How To Use The CSV File

The CSV file is a very basically formatted set of data and though human-readable, it is not intended for direct manipulation or use. Instead, it's better to import the file into a database or spreadsheet program and then manipulate it using the more powerful features of that software. This does require a reasonable level of computer skills; computer-challenged individuals are encouraged to solicit assistance.

Below are some application suggestions you may find useful.

### ***Mailing Labels and Member Counts***

To generate a list of members for mailing labels or just to count members, regions typically want the addresses of only their active primary members. In a database (as an example to contrast with a spreadsheet) you'd just ask for those records in a query and you'd be done (status = 'A' or 'ARNEW' and category = 'M'). In a spreadsheet, you have to manually manipulate the rows so there's more effort involved. Start by copying the file so you can edit it without losing the original. In the new file, go to the bottom of the file and highlight & delete all rows with status = 'ID' or 'NO' - these are non-members. Optionally you could keep the 'NO' people since they are recent drops (< 2 months) and might re-up, and you may omit the category="M" step to include affiliates in your labels/count. Note that affiliate addresses are *not necessarily correct* due to National Office procedures.

Next, sort the remaining rows on category = 'M' and you'll end up with all primary members lumped together - this is your mailing label set. Delete all other rows using row multi-select so it's fast. You should be able to do the entire above operation in about 30 seconds or less once you become proficient.

Note that Microsoft Word can do mail-merge mailing labels too, and you can specify a conditional query with it to automatically find only those spreadsheet records matching the criteria of an active primary member, just like the database example above. This solution takes a few minutes to set up and then essentially zero time after then to produce a mail label run.

## ***New Member Identification***

You can identify new PCA members in your region fairly easy. Sort the roster on column “Anniversary\_Date”, descending. This makes the newest members sort to the top of the list where you can easily identify them by examining their anniversary date. The newest members will have the latest anniversary dates. Note that the dates are always the first day of the month in which they joined PCA. The technique above works only for people who’ve just joined PCA. For transfers-in, the only way to detect them is to compare a given roster with the previous month’s roster. In a database you can construct a query with an outer join on field “ID” between the new & old rosters (this takes some knowledge of query construction). In a spreadsheet this technique is not feasible.

## ***Zip/Postal Codes***

When you import the CSV file to a database or spreadsheet, the application looks at the data to figure out what type it is – textual or numeric. Usually, U.S. zip codes look like numbers but this is wrong on two counts – first, numbers do not have leading zeroes but zip codes do, and second, Zip+4 format has a dash (“-“) in it which is non-numeric.

You can fix this in a spreadsheet such as Microsoft Excel by highlighting the zip code column header, and select Format, Cells on the menu, then picking Text.

In a database, you open the table definition, and change the zip code column to Text and save then save the table definition again. You may have to do this on an empty table prior to importing the data, in order to avoid import errors.

## ***Capitalization***

The capitalization is presented in the CSV file exactly as it exists in the National database. It was always entered in capitals in the previous legacy system. The current upper/lower case policy is determined by the National Office staff, but you can easily override it by using the Proper() function in Microsoft Excel to get initial caps, or Lower() or Upper(). For example, if your capitalized address “123 MAIN STREET” is in cell R4, then PROPER(R4) = "123 Main Street". Drag this formula down the spreadsheet and you can instantly get the address formatted however you want, with virtually no effort. To make this solution work in future months when new CSV files come along, put the formulas on another sheet so they don't get overwritten with the new CSV. Repeat the formula for address 2, city, and state.

## **Roster CSV File Data Column Definitions**

As a stop-gap measure until eSeries is available, regional membership volunteers are being provided with a CSV dump of their membership roster on a request basis. CSV stands for *Comma Separated Value*, a standard format for a cross-platform universal text format that’s compatible with spreadsheets, databases, and word processors.

Following are definitions of selected important columns used by the iMIS records management system. Use these fields in storing, recalling, and relating your PCA membership records.

**Note:** Not all of the following database fields are *currently* in region membership files sent by the National Office on a monthly basis. Future membership files may contain different information as they are adjusted to meet the needs of all regions.

### ***DATA\_DATE***

The date that the CSV file’s data was prepared. This will be the same for all rows, and confirms the timeliness of the data.

## CHAPTER

The member's regional affiliation code. For individual region membership CSV files, this column will contain the same entry for every member, and is a way to label the data to guarantee that it is for the intended region.

### ***ID (Membership Key)***

#### **Historical membership numbers**

Historically, the PCA member and any affiliate member had the same membership number, with a suffix letter differentiating the two. The number itself indicated the original month & year that the member joined PCA, reduced by any short gaps of dues non-payment (long membership gaps required an entirely new membership number, and "seniority" was lost). Though this was adequate for its intended purpose, it precluded a truly flexible approach to record management, and the inclusion of additional related people for potential future uses.

For example, Rick Rocket is member 1986101234M and Mary Rocket is 1986101234A. Rick joined the club in September 1986; Mary's join date is unknown.

#### **Historical Key Examples**

- 1986101234M (Rick Rocket, primary club member)
- 1986101234A (Mary Rocket, Rick's affiliate member)

#### **New iMIS membership numbers**

The record primary key is in field *ID*.

iMIS improves on the legacy design by altering how record keys are generated and used. The primary member retains the original number formatting, less the suffix letter (the format is described below). Affiliates get their own unique membership number which may or may not be in the "normal" sequence or formatting.

#### **Membership number format; traditional versus 1900xxxxxx / 1500xxxxxx**

When the legacy records management system was converted to iMIS, existing affiliates had to be converted and get their own unique membership number. For technical reasons (not enough free numbers within range), the existing membership number format could not be used, so two new sequence prefixes were used: 1500 and 1900. The remaining portion of the member number, including the month part as defined below, is a serial number only. These numbers take the place of the traditionally used year and month components, have no inherent meaning and may only be used as a key (i.e., its usage is not "overloaded" to have multiple meanings such as club join date).

A "traditional" membership number is formatted as YYYYMMNNNN, e.g. 1983109039. The letter "M" or "A" was appended in the old management system to indicate Member or Affiliate. The number format breaks down like this:

- YYYY is the year in which the member joined
- MM is the month following the month in which the member joined (December wraps to January of the following year)
- NNNN is a serial sequence number assigned by the National Office

All new members (primary & affiliate) get the traditional format going forward; most numbers containing 1500/1900 are from affiliate records when they were initially converted to the new management system.

Valid member numbers are always 10 digits.

The valid range for the first 4 digits is always in this list:

- 1500 - converted
- 1900 – converted
- 1955-2005 - traditional (the 2005 moves up each year)

For 1500 and 1900 series membership numbers, the remaining 6 digits are a sequential serial number, starting at 010000. Members receiving this series get a semi-random assignment in the sequence.

For traditional series membership numbers, valid values for the next two digits (month) are: 01-12, and valid values for the last 4 digits (serial number) are anything: digits 0-9 in all positions.

\*\*\*\*\*

**New membership number example**

For example, Rick Rocket is member 1999024321 and Mary Rocket is 1900025678. (Mary might also be 1999024322 (Rick + 1), or another number).

Field *MAJOR\_KEY* contains a duplicate of the *ID* field but only for legacy club members, that is, members who were converted from the legacy PCA record management system. Recently added members (added only to iMIS), non-members and businesses and will have a null or empty *MAJOR\_KEY* field.

Field	Meaning	Definition	Examples
ID	Record Primary Key	Unique identifier for record; exists on all records of any type.	<ul style="list-style-type: none"> <li>• 1999024321 (Rick Rocket, primary club member)</li> <li>• 1900025678 (Mary Rocket, Rick’s family member)</li> <li>• 1900011003 (Better Brake Company)</li> <li>• 2003037909 (PCA Region)</li> </ul>
MAJOR_KEY	Duplicate of Record Key	Not in CSV file. For club member records, this field duplicates the <i>ID</i> field of legacy records. For other record types and new members, this field is normally empty/null.	Same as above.

**Linking Primary and Affiliate members**

Since affiliate members no longer share the primary member’s number, there is a new method of linking the two people. Each database record has a field called *CO\_ID*, which is the record key of an affiliate’s corresponding primary member (primary members themselves have null/empty *CO\_ID* fields).

Another field *CO\_MEMBER\_TYPE* contains the primary member’s *MEMBER\_TYPE* value.

Field	Meaning	Definition
CO_ID	Record key of related primary member	Every affiliate club member is associated with a primary member; this field contains the ID of that primary member. In primary member/non-member records, this field is empty/null.
CO_MEMBER_TYPE	Record type of related primary member	A copy of the primary club member's <i>MEMBER_TYPE</i> field. In primary member/non-member records, this field is empty/null.

**CATEGORY, STATUS, and Other Code Definitions**

Following are the definitions of three fields which indicate the type and status of a record. Not all PCA iMIS records are club members, as illustrated below. However, regional membership CSV files will be filtered and contain only member records (*MEMBER\_TYPE* = MBR or A).

**CATEGORY field codes:**

Code	Meaning	Definition
M	Member	Misnomer - A primary record (but not honorary or lifetime). May or may not be a club member.
AM	Affiliate Member	Unrelated affiliate member to a primary member (e.g. friend).
FM	Family Active Member	Related affiliate member to a primary member (e.g. spouse).
HONOR	Honorary	Honorary (primary) member.
LIFE	Lifetime	Lifetime (primary) member.
PROSPECT	Prospect	A prospective member.
Empty/Null	n/a	Observed: Record is a region, non-member, or non-member company. No category assigned.

**STATUS field codes:**

Members have a chronological progression of their Status value during their tenure:

Non-renewal sequence (member is dropping out): A → ARNEW → NO → ID.

Renewal sequence (member is renewing): A → ARNEW → A

Code	Meaning	Definition
A	Active	Active (normal club member). All current members have this value unless they're renewing.
ARNEW	Renewal	Renewal – club member who is nearing their expiration date and is in the renewal period. Still a member.
D	Marked for deletion	n/a
I	Inactive	n/a
ID	Deleted	Member left the club long ago (over 2 months) and is deleted from the membership roster. Their record still exists for historical purposes. If member renews from this state, they will receive a new membership number.



Code	Meaning	Definition
NO	Non-renewal	Did not renew within 2 months of end date; not a club member now; about to be dropped from the club permanently unless they renew. If member renews from this state, they will retain their original membership number but their anniversary date may be adjusted for the gap.
S	Suspended	Membership temporarily suspended.
X	Deceased	R.I.P.

**MEMBER\_TYPE field codes:**

**Note:** This field is included in the membership CSV file, but filtered to contain only MBR and A records (i.e., club members).

Code	Meaning	Definition
MBR	Member	Individual full member - a club member of some category.
A	Associate Member	Special junior membership status. There are a very small number of these records. Used for members who no longer own a Porsche or meet membership entry requirements.
NM	Non-member	Non-member individual (e.g. VIPs).
NMC	Non-member Company	Non-member company (e.g. an advertiser).
QUEST	Quest program	Quest members are searching for a Porsche and have a 6 month, non-renewable membership. They are not full members of the club.
REG	Region	A region's information, if available (e.g. P.O. box for club).
WEB	Web signup	A new PCA sign-up / application received from the pca.org web site.

**MEMBER\_STATUS field codes:**

Code	Meaning	Definition
All	Legacy	Not in CSV file. This column is included for legacy purposes; the previous record management system used this field, which has been converted into iMIS fields above.

***LAST\_NAME, FIRST\_NAME, MIDDLE\_NAME, SUFFIX, PREFIX, DESIGNATION***

Mostly self-explanatory. The data currently contains mixed-case names, including suffixes which are normally capitalized. There are also empty/null names due to data issues. This will be corrected in the future as the data is reviewed and adjusted.

A person’s full name is <prefix> <first\_name> <middle\_name> <last\_name> <suffix> <designation>. *DESIGNATION* can actually be several professional suffixes concatenated such as DMD, Esq., DVM, PhD, etc.

For example, Dr. James B. Selders Jr. DMD PhD NerD. Some names have punctuation in them, but will never have commas or spacing; if you print letters or mailing labels you’ll need to take that into consideration as you format the name.

**EMAIL**

Self-explanatory. This is the last provided email address, but due to frequent movement of members from one email address to another, it may no longer be accurate in all cases.

**JOIN\_DATE, PAID\_THRU**

Since membership numbers no longer necessarily contain implied membership starting dates, they cannot be used to determine renewals, anniversaries, or seniority. Instead, there are new, specific fields for those purposes.

*JOIN\_DATE* indicates the date a member’s application to join the club was processed. For affiliates, this is the date their member affiliation was established in the office. This date is frequently, but not necessarily, the same as *ANNIVERSARY\_DATE*. Some rows may empty/null until the data is reviewed and corrected.

*ANNIVERSARY\_DATE* indicates the day a member joined the National club, adjusted for any previous short membership gaps. This may be used in determining anniversaries and seniority. The format is MM/DD/YYYY. Some rows may empty/null until the data is reviewed and corrected.

*PAID\_THRU* is the final day of membership (for records of club members); after this the membership expires. Use this date to determine renewal times and events you connect to it such as reminder letters. Some rows may empty/null until the data is reviewed and corrected.

*RENEWED\_THRU*, not in the CSV file, indicates the date after which the member’s National membership expires in special cases (see below); the format is MM/DD/YYYY. Note that this field only has meaning for members; non-members obviously do not renew, and this field may be empty/null.

*RENEW\_MONTHS*, not in the CSV file, indicates the number of months for which a member renewed. Note that this field only has meaning for members; non-members obviously do not renew, and this field may be empty/null.

<b>Field</b>	<b>Meaning</b>	<b>Definition</b>
JOIN_DATE	Date that member was processed in office	The date that the member’s application / assignment to club records occurred at the National Office. This may be different than the actual date used for calculating anniversaries. This data is empty/null for some members.
ANNIVERSARY_DATE	Joined PCA date	The date that the member joined the club originally, adjusted for any brief lapses. Used in calculating anniversaries & seniority. This data is empty/null for some members.

Field	Meaning	Definition
PAID_THRU	Expiration date	The last paid day of the individual's club membership; after this, their membership expires. Note that multi-year renewals can push this date up to (currently) 3 years into the future. This data is empty/null for some members. Use this column to identify when a person's membership expires.
RENEWED_THRU	Future / Current Expiration date	Misnomer; not in CSV file. For members whose Status = "A", this date will equal the <i>PAID_THRU</i> date, if there is one, otherwise it's the date membership expires. For members who enter the ARNEW state under iMIS, this date will be <i>PAID_THRU</i> + <membership duration>, or the end date of their membership if they do indeed renew. This data is empty/null for some members.
RENEW_MONTHS	Membership duration in months.	Not in CSV file. Values: 0/12/24/36 – number of months that the member renewed for. Zero indicates the member has yet not renewed while iMIS was in use.

## **COMPANY**

The company name of the mailing address, if any. Empty/null for most rows.

## **ADDRESS\_1, ADDRESS\_2, CITY, STATE\_PROVINCE, ZIP, COUNTY, COUNTRY**

Mailing address component lines; self-explanatory. Most, but not all addresses begin in *Address\_2*, with *Address\_1* blank. If you print address labels from this information, be sure to include both lines on the label; you may be able to specify that blank lines do not print from your label-printing application in order to improve their appearance.

You may omit *County* and *Country* for most mailings. They are included for completeness, and also because some regions need county information for certain purposes.

## **HOME\_PHONE, WORK\_PHONE**

Respective phone numbers including area code. The format is mostly consistent for North American numbers: (aaa) xxx-nnnn. A few records will contain other formats.

## **CAR\_YEAR, CAR\_MODEL, CAR\_COLOR, CAR\_BODY**

Related Porsche information. All fields are textual and may contain anything – there is no fixed list of model names, for instance, and the year may be non-date formatted (e.g., 1985.5 944). For the few members with multiple cars registered with PCA, one car will be chosen at random.

For members who have recently joined PCA, this information should be very accurate. For longer-term members, this information will be less reliable, as members sell and buy cars but do not inform PCA.

## Transaction CSV File Data Column Definitions

This file, introduced for the June 2005 reporting period, contains all member transactions within your region. This includes 3 types of renewals (normal, late, delete), transfers in and out, and membership cancellations.

Member record changes such as address, email, affiliate, etc. do *not* appear in the transaction file at this time.

The transaction file covers the month's transactions, precisely covering the first second of the first day, to the last second of the last day, regardless of the length of the month.

Note that while the transaction file covers exactly one month, the roster file is slightly different – it is a snapshot of membership roster status at the moment the data was extracted from the membership system. Thus it is possible that your roster will show slightly different membership information than the transaction file might indicate, particularly for transfers.

Following is the definition of each column in the transaction CSV file.

### **ID**

The relevant member's PCA membership number.

### **LAST\_FIRST**

The member's last and first names, comma-separated.

### **CHAPTER**

The member's *current* region, at the moment the data was extracted from the PCA system. This should normally be your region, except for transfers-out where it is the member's new region. For transfers-in, you cannot tell which region they came from at the present time.

It is possible for a member transaction to occur in your region's data, followed by the member transferring out; in this case you will see the member's new region – don't be confused because it looks like a transaction from another region.

**For all transactions except Transfer\_Out, if another region code exists, contact the National Office immediately to examine this, or the other region will get that member's regional refund!** The Chapter field should always have your region code except for transfers out, and rare cases of someone renewing membership and immediately transferring out.

### **FULL\_ADDRESS**

The member's assembled full address, composed of address 1, address 2, town, city, state, postal code, and country.

### **ACTIVITY\_TYPE**

A code which partially indicates the type of transaction record.

Code	Meaning	Definition
DUES	Normal renewal or new member	The member renewed their membership on time, prior to its expiration, or a new member. New members are identified by a current year and month in the membership number (ID field).

Code	Meaning	Definition
MBR_STATUS	A member status change	The membership status or region has changed. Typically occurs for transfers and late renewals, where the member had dropped into one of the expired states (see Roster code definitions) and is now returning to active membership.

**TRANSACTION\_DATE**

The date upon which the transaction occurred in the National Office. You may also see a time of 0:00, which may be ignored.

**PRODUCT\_CODE**

iMIS product code. A code which partially indicates the type of transaction record.

Code	Meaning	Definition
CANCEL	Cancelled	The member requested cancellation of their PCA membership. Very rare.
CHAPT/<region>	Regular dues payment	Regular renewal or new member signup. Your region code appears.
DEL_RENEW	Delete Renew	The member had been deleted from the roster for non-renewal <i>over</i> 2 months, and has renewed very late. Member has been reinstated. Their status field changes: ID->A
LATE_RENEW	Late Renew	The member had been deleted from the roster for non-renewal <i>under</i> 2 months, and has renewed late. Member has been reinstated. Their status field changes: NO->A
TRANSFER_IN	Transfer In	Member has transferred in from another region. Previous region cannot be determined.
TRANSFER_OUT	Transfer Out	Member has transferred out to another region. Their Chapter column indicates the new region.

**THRU\_DATE**

For new members and renewals, this indicates the calendar date through which the membership is valid. From this field you can determine if the renewal was for 1, 2, or 3 years. Lifetime and Honorary memberships are a special case. You may also see a time of 0:00, which may be ignored.