Union Admin guide

2024 BCFED Convention

Welcome!

The 2024 Convention is using the same online registration system as we used in 2022, with every affiliate having its own **union admin** account on our website.

The union admin manages your delegate registrations (as well as submitting resolutions.) The union admin can create, edit and remove their affiliate's delegates, and pay the delegate registration fees. (Individual delegates can also edit their own information.)

If you're the union admin for your affiliate, you'll have received a username and password by email.

Click this link to log in with the credentials you received by email

Profile screen

Here's the screen you see when you log in as a union admin. (In this example, the name of the union is "Union With Subaffiliates.")

From here, you can:

1. Register a single delegate

2. Register several delegates at once (by importing them from a CSV file)

3. Register as a delegate yourself

4. Pay for your delegate registrations

5. Update your profile

6. Submit a resolution

7. See your affiliate's delegates, along with your delegate

entitlement and how many delegates you have registered.

8. Edit individual delegate info.

9. Download a CSV file with all of the delegates you've registered.

Do: **have a single person act as your union admin.** That person collects the registration info from all of your delegates and then submits it.

Please don't: **share the union admin credentials** and ask delegates to register themselves. This often leads to one delegate overwriting another delegate's info, accidental deletions and other problems.
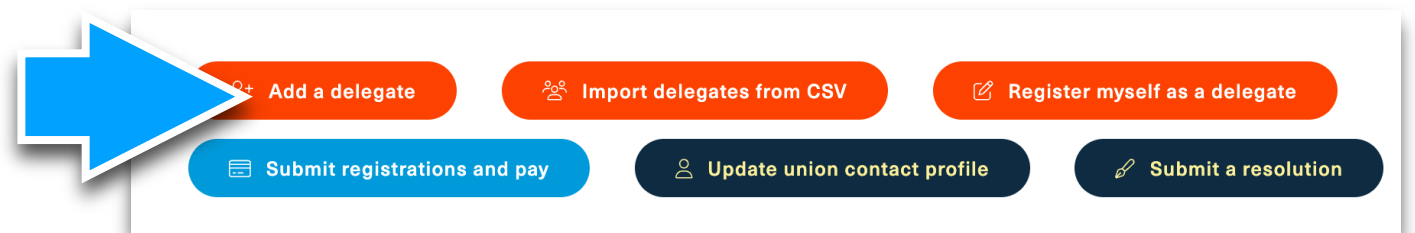
Registering a single delegate

To register a single delegate, start at your profile screen, and click "Add a delegate." (To register yourself, choose "Register myself as a delegate.")

You'll be taken to the Registration page. Under the title, you'll see a summary of your affiliate's remaining delegate entitlement.

Fill in all the information about the delegate. (Their email address will also serve as their username.)

If you don't know whether the delegate will attend the Human Rights Forum or Young Workers Forum, say "no" to each.

(cont'd)

Registering a single delegate (cont'd)

Select a payment option. You can wait to pay until you've registered all your delegates.

Click "Register now."

You'll be taken back to your profile page. And the delegate will receive a welcome email with instructions for logging into the website in case they need to update their information.

You can register as many delegates as you'd like, up to your delegate entitlement.

If you're registering only a delegate or two at a time, this works well. But if you have more than that, you may want to use our bulk import feature.

Registering multiple delegates via CSV

"CSV" stands for "comma-separated values." A CSV file is a text file for storing spreadsheet data. (You may have seen it as an export option when you're saving Excel files.)

To register multiple delegates, start at your profile screen, and click "Import delegates from CSV."

This will take you to the "Import delegates" page. Note the warning text. Then click the "Download CSV template" to download a file you can then import into your favourite spreadsheet program. Let's say it's Excel.

(cont'd)
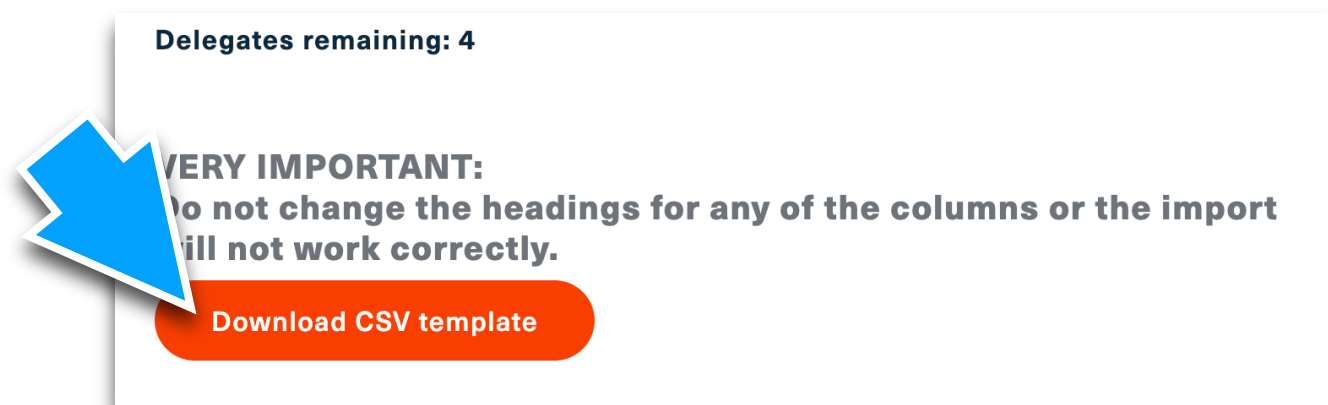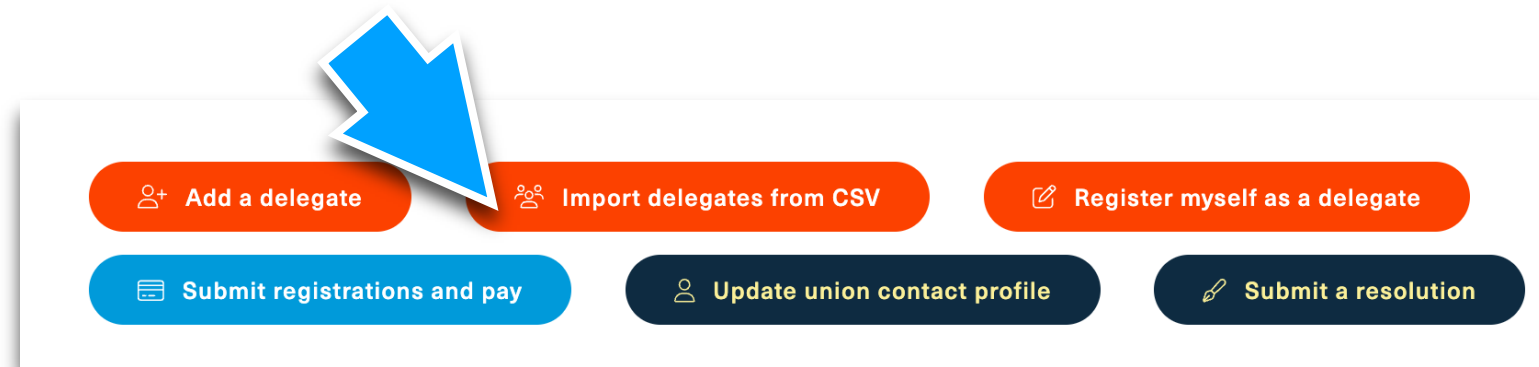
Registering multiple delegates via CSV (cont'd)

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	username	email	First Name	Last Name	What are you	Phone	City	Province	Postal Code	Country	Are you atter	Are you atten	Are you a You	Do yo
2	rob2029@rol	rob2029@rol	Terry	Blatchford	she/her	250-555-555	Victoria	BC	V9P 2V6	CA	no	yes	yes	no
3	rob2030@rol	rob2030@rol	Murky	Crumble	he/him	250-555-555	Victoria	BC	V9P 2V7	CA	yes	yes	no	yes
4	rob2031@rol	rob2031@rol	Sleepy	Dessert	they/them	250-555-555	Victoria	BC	V9P 2V8	CA	no	no	no	no
5	rob2032@rol	rob2032@rol	Juniper	Creek	he/him	250-555-555	Victoria	BC	V9P 2V9	CA	yes	yes	yes	no
6	rob2033@rol	rob2033@rol	Cedar	River	she/her	250-555-555	Victoria	BC	V9P 2V10	CA	no	yes	no	yes
7	rob2034@rol	rob2034@rol	Willow	Fleuve	she/her	250-555-556	Victoria	BC	V9P 2V11	CA	yes	no	no	no
8	rob2035@rol	rob2035@rol	Heather	Ocean	they/them	250-555-556	Victoria	BC	V9P 2V12	CA	no	yes	yes	no
9	rob2036@rol	rob2036@rol	Fir	Tributary	she/her	250-555-556	Victoria	BC	V9P 2V13	CA	yes	yes	no	yes

Fill out the spreadsheet with your delegates' information. Make sure there's a value in each cell.

Make sure "username" and "email" have the same value.
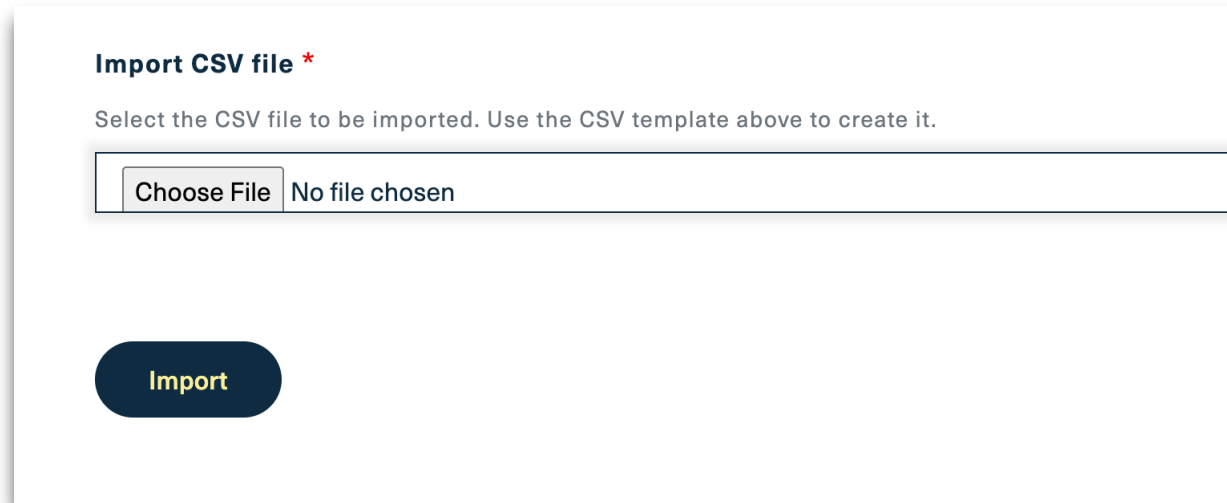
For the "Are you attending..." and "Do you identify..." questions, answer "yes" or "no" where appropriate, and "no" if you aren't sure.

For payment, enter "cheque", "credit card" or "e-transfer" (all lower-case).

Important: Please don't change any of the headers in the first row, or the import will not work properly.

Save the file in CSV format (not as an Excel file).

Registering multiple delegates via CSV (cont'd)

Import CSV file *

Select the CSV file to be imported. Use the CSV template above to create it.

Choose File | No file chosen

Import

On the "Import Delegates" page, click "Choose File" and select the file you've just saved, double-checking that it's in CSV format.

Click the "Import" button. The file will upload, and the site will process it.

You'll then see a results screen that either tells you how many delegates you've registered, or lets you know something went wrong.

If something does go wrong, it's usually because:

- The file was saved in Excel format
- Information was improperly formatted
- The headers were changed
- There were too many delegates for your affiliate's entitlement.

Have a look at your file and see if any of these were the issue. If you can't resolve the problem, contact us.

Editing delegate information

You can edit any of your affiliate's delegate information from your profile page. Just click the "Edit" link next to their name.

You'll be taken to the Registration page. Under the title, you'll see a summary of your affiliate's remaining delegate entitlement.

Fill in all the information about the delegate. (Their email address will also serve as their username.)

If you don't know whether the delegate will attend the Human Rights Forum or Young Workers Forum, say "no" to each.

Click "Update registration" to save.

Export a list of your delegates

To export a list of your delegates, go to your profile page. Scroll to the bottom of the list of your registered delegates.

There, you'll find a button labeled "Download CSV". Click it, and you'll download the list of all of your delegates in a CSV file that you can import into your spreadsheet software.

Total number of delegates registered: 12
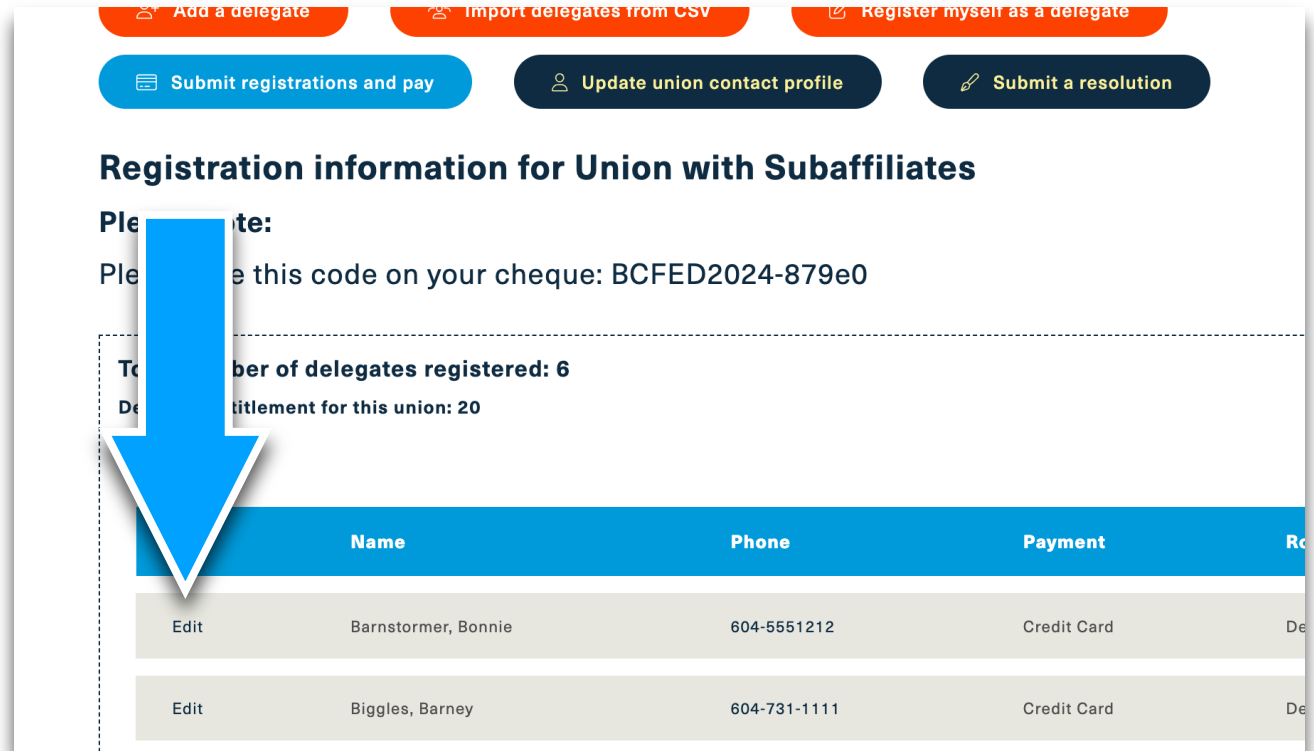**Delegate entitlement for this union: 20**

Expand filters

Edit	Name	Phone	Payment	Role(s)	Created
Edit	Barnstormer, Bonnie	604-5551212	Credit Card	Delegate	2024-09-05
Edit	Biggles, Barney	604-731-1111	Credit Card	Delegate	2024-09-05
Edit	Blatchford, Terry	250-555-5555	Credit Card	Delegate	2024-09-06
	Cottingham, Rob	604-861-4321	Cheque	Administrator, Delegate	2022-05-30
Edit	Creek, Juniper	250-555-5558	Credit Card	Delegate	2024-09-06
Edit	Crumble, Murky	250-555-5556	Credit Card	Delegate	2024-09-06
Edit	Dessert, Sleepy	250-555-5557	Credit Card	Delegate	2024-09-06
Edit	Fleuve, Willow	250-555-5560	Credit Card	Delegate	2024-09-06
Edit	McGrath, Kate	604-430-1421	Credit Card	Delegate	2024-09-05
Edit	Ocean, Heather	250-555-5561	Credit Card	Delegate	2024-09-06
	River, Cedar	250-555-5559	Credit Card	Delegate	2024-09-06
	Tributary, Fir	250-555-5562	Credit Card	Delegate	2024-09-06

Download CSV

Removing a delegate

You can remove a delegate in much the same way as you'd edit their information. Start by clicking on their "Edit" link. That will take you to the delegate's Registration page.

Scroll to the bottom of the Registration page. Click the "Cancel account" button.
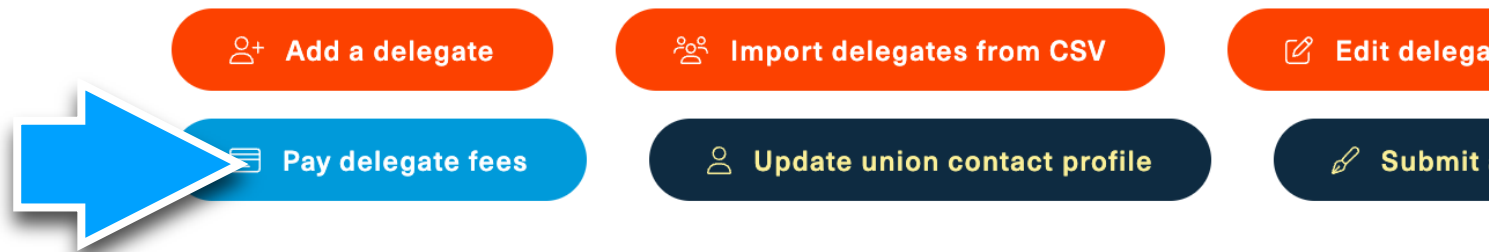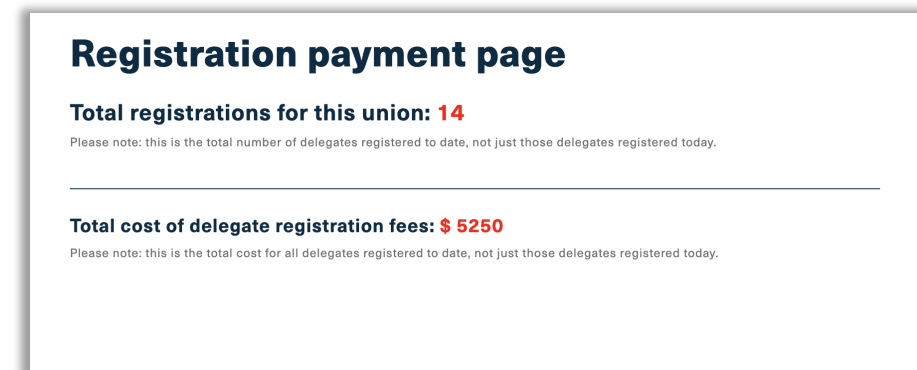
Finally, confirm you want to remove the delegate.

Paying delegate registration fees

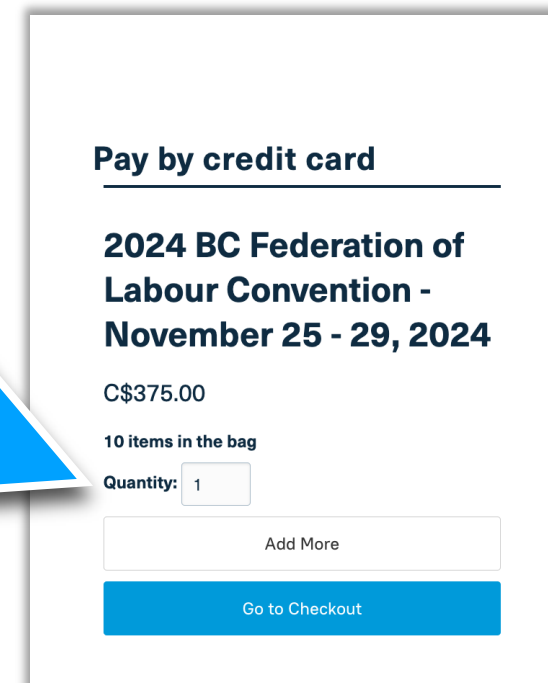To pay your delegate registration fees, click the "Pay delegate fees" button on your profile page.

This takes you to the registration page. It tells you how many delegates you have registered, and the total fees you need to pay.

You can pay by credit card, cheque or e-transfer.
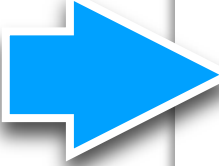
To pay by credit card, enter the number of delegates you are registering in the "Quantity" field. Then click "Go to checkout." A widget will appear where you can enter your email, and then your credit card information.

Add a delegate

Import delegates from CSV

Edit delega

Pay delegate fees

Update union contact profile

Submit

Registration payment page

Total registrations for this union: 14

Please note: this is the total number of delegates registered to date, not just those delegates registered today.

Total cost of delegate registration fees: $ 5250

Please note: this is the total cost for all delegates registered to date, not just those delegates registered today.

Pay by credit card

2024 BC Federation of Labour Convention - November 25 - 29, 2024

C$375.00

10 items in the bag

Quantity: 1

Add More

Go to Checkout

Paying delegate registration fees (cont'd)

To pay by cheque or e-transfer, follow the instructions as shown. Your affiliate has a unique cheque code, which will be displayed on your profile page once you click the "Pay by cheque or e-transfer" button.

Include this code in the memo field of your cheque, or the message that accompanies your e-transfer.

Pay by cheque

Please mail your cheque, payable to BC Federation of Labour, to our office: BCFED, 110-4259 Canada Way, Burnaby BC V5G 1H1. **Please be sure to include the cheque code that appears on the next page in the cheque's memo field.**

Pay by e-transfer:

Send an e-transfer via your credit union or bank to acctg@bcfed.ca. **Be sure to include the cheque code that appears on the next page in the message.**

Pay by cheque or e-transfer

| 👤+ Add a delegate | 👥 Import delegates from CSV | ✎ Edit delegate profile |
| 🖃 Pay delegate fees | 👤 Update union contact profile | ✎ Submit a resolution |

Registration information for Union with Subaffiliates

Please note:

Please include this code in your cheque's memo field or in a message with your e-transfer: BCFED2024-140e2

Questions?

Contact the BCFED convention team at convention2024@bcfed.ca.

Thank you... and see you in November!

BCFED

A future worth fighting for

CONVENTION 2024

November 24 to 29 | Vancouver