



Upgrading NARFE's AMS

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First: About Me

I joined NARFE as director for communications and marketing in 2020.

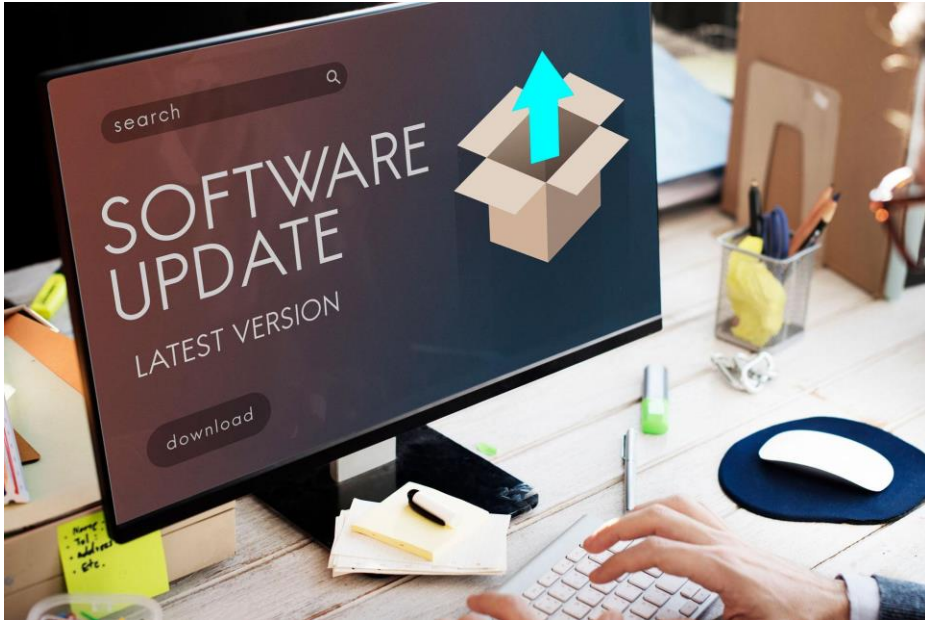
Prior to joining NARFE, I worked for Sightline Media Group, developing digital products and producing publications serving the military, defense industry and federal workforce, including Federal Times.

When Johann De Castro left NARFE last month, I took over the AMS Update Project. This involves working with our vendors and the CAB, as well as working to prepare and train staff.

I will be offering training for officers as well.



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Overview

- Our membership database software was deprecated. Microsoft was shutting it off.
- We moved to Dynamics 365 to make a more flexible and stable AMS.
- Members probably see no difference.
- Officers have pain points we're working to address.
- Our new AMS will make it easier to launch more FEDHub communities.

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What Are We Doing?

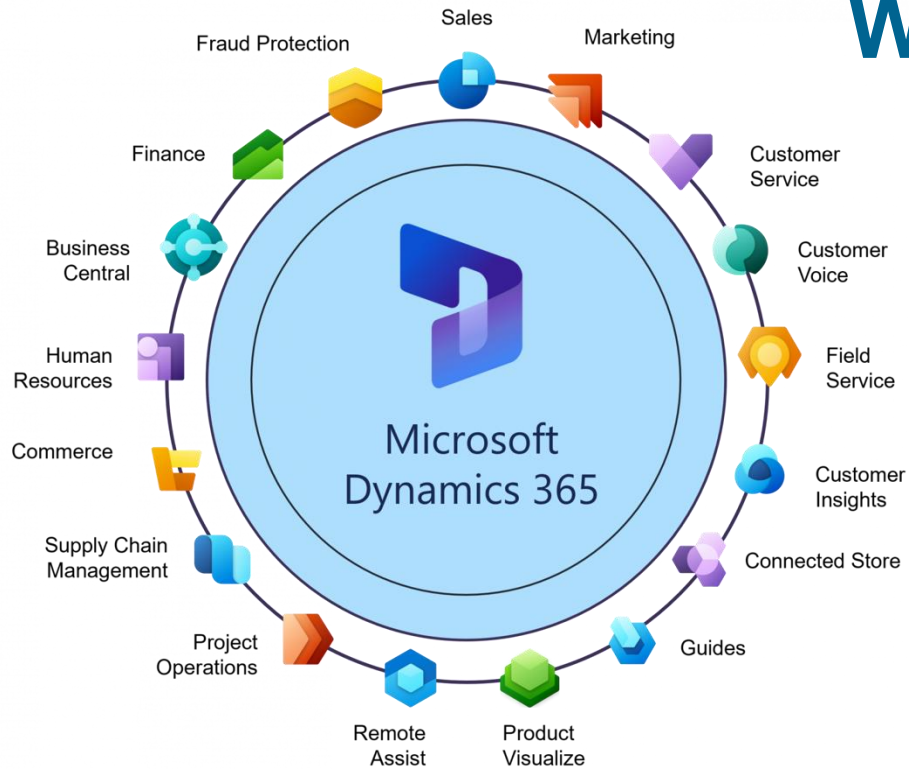
NARFE's Association Management Software ("the AMS," our membership database) was upgraded this month.

- Our old AMS, built by Protech on the Microsoft Dynamics platform, was upgraded to a new version.
- The "new" AMS uses Microsoft Dynamics 365.
- No data was "moved" □ this was akin to opening a file in a new version of software.





Why Are We Doing This?



- Moving to Dynamics 365 will help ensure that NARFE is using the latest technology and receiving ongoing support.
- Microsoft continuously updates Dynamics 365 with new, improved features and security enhancements. Dynamics 365 seamlessly integrates with other Microsoft products, such as Office 365, to streamline workflows and enhance overall productivity.
- NARFE will have greater customization options to better serve our members.

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Effect on Members

For most members, the change is “done,” and they probably see **no difference.**



What This Means for Members

- Post-upgrade, members can once again access members-only content on narfe.org. (At no time was our website “offline.”)
- Account information tasks are available at members.narfe.org, such as webinar registration and membership renewal.
- Members can log into and post on FEDHub.
- Customary Daily News Clips and weekly NewsLine emails have resumed.

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Effect on Officers

For officers, we still have a lot of work to do to restore previous capabilities.





What Does This Mean for Chapter and Federation Officers?

- Officers can access the MX Officer Portal, at members.narfe.org, and view their federation and chapter dashboards.
- The Officer Portal looks essentially the same, but reports are not yet accessible. (One difference users may notice: buttons leading to obsolete member databases, OAM and ORM, have been removed.)



How About Microsites?

Administrators of WordPress website hosted by NARFE have regained the ability to edit their sites. At no time were these websites “offline”; they just couldn’t be edited.



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Higher Logic and AMS

Higher Logic is a technology partner that provides both FEDHub, our online community, and Informz, the marketing automation platform headquarters uses (it's our email).

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FEDHub is NARFE's online community for active and retired federal employees. Members can connect to share advice, solve challenges and develop new approaches.

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Exciting Opportunity: FEDHub Chapter Communities

- Chapter 0479 in Region I was piloted last year. It helped me identify significant gaps in our syncing with member records. Earlier this week, a new 0479 community was launched with 353 members (the number in AMS with 0479 as their current primary chapter).
- A test email went out to all 0479 members using FEDHub's email capabilities, and several users responded that they were happy to have received it. The community admin is the chapter president.
- We will be working with chapters to create communities upon request; identifying a community admin who has a position code with "rights" to email members is key. This is a priority for the first half of 2025.
- More than 20 have launched so far.

Thank You!

Got questions? Email jrafael@narfe.org