Masonic Membership Solutions

Quick Service Guide State/ Local Officer Module

A step-by-step user reference guide for easy navigation through the Officer module of MMS-YRIS.

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Version 2.0.26

Contents

Introduction 2
State Edit 2
Local Edit 13

State and Local Officer Module

For the Officer Module we did not make modifications to the old module but we did a complete rewrite taking the input from many of our users who found the old module to be cumbersome, which we could not disagree with. The most important feature is you have all your officers displayed on one screen and broken up into three areas:

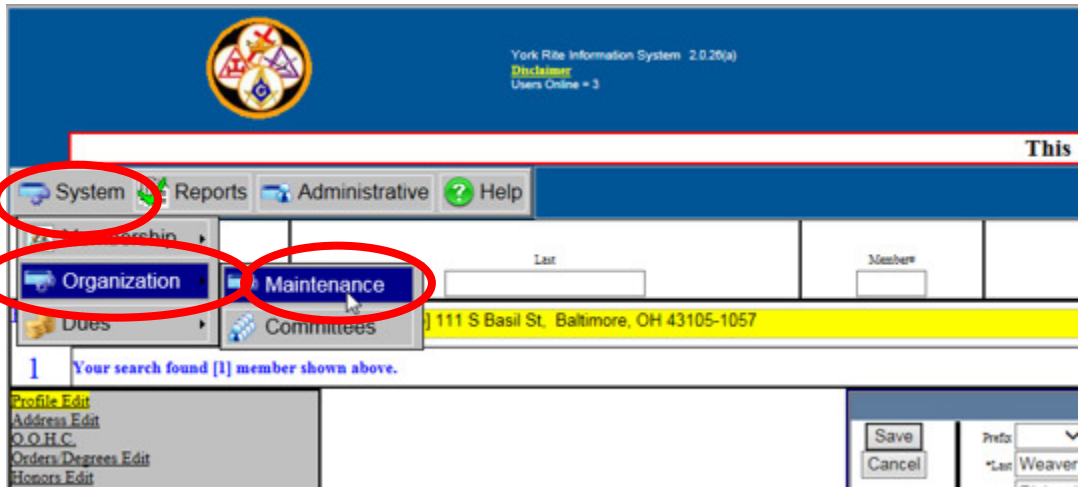
- Current Officers – your current core of Officers
- Active Past Officers – your Past Officers that are active within YRIS (only contains officers with a title of Past or Emeritus as approved by Grand Encampment)
- Inactive Past Officers – your Past Officers that are inactive within YRIS (only contains officers with a title of Past or Emeritus as approved by Grand Encampment)

Within the Officer Module we have also removed the end date and are not tracking progression within the line – it is not important that John Smith was a Warder in 1970 and advanced to Junior Warden in 1971 but that John Smith is a Past Commander with Commander Term starting 6/1/1977.

Also along with the Officer Module we have also made changes to the reports for (Officer Roster / Organization Roster / Voting Delegates).

State Edit

1. Officers Edit by State
    a. Go to System / Organization / Maintenance



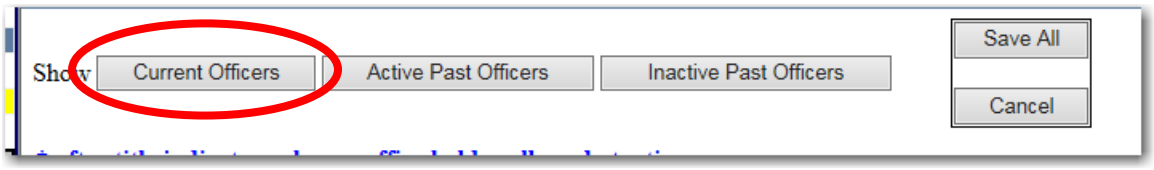
b. At this point no Local will be chosen since we are only working on the state level

c. Click on Officer-Edit on the left hand side of screen

The new Officer Module is designed with (3) tabs at the top

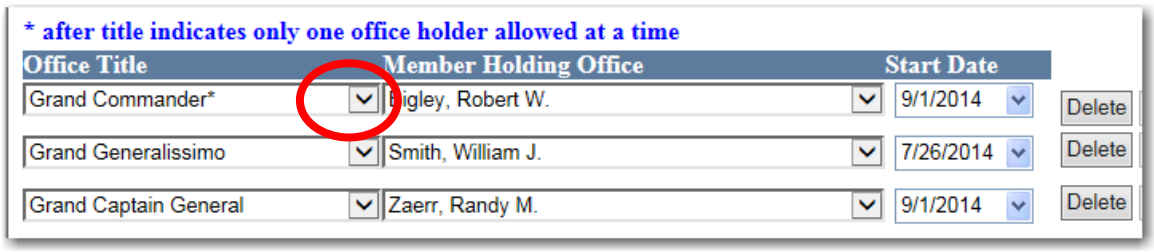
1. Current Officers – your current core of Officers
2. Active Past Officers– your Past Officers that are active within YRIS (only contains officers with a title of Past or Emeritus as approved by Grand Encampment)
3. Inactive Past Officers– your Past Officers that are inactive within YRIS (only contains officers with a title of Past or Emeritus as approved by Grand Encampment)

First we will Review the ***Current Officers*** tab.



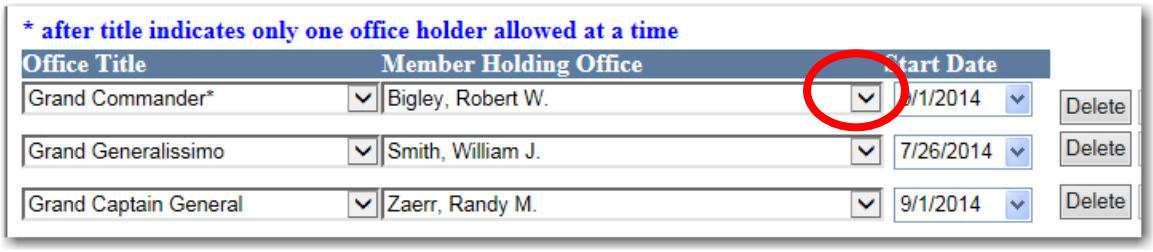
Under the ***Current Officers*** tab (which is the default tab when the screen opens), the user is able to see, edit, and add all their current officer records.

To edit an office title, use the drop down to select a new one**. NOTE: The * after title indicates only one office holder allowed at a time!**

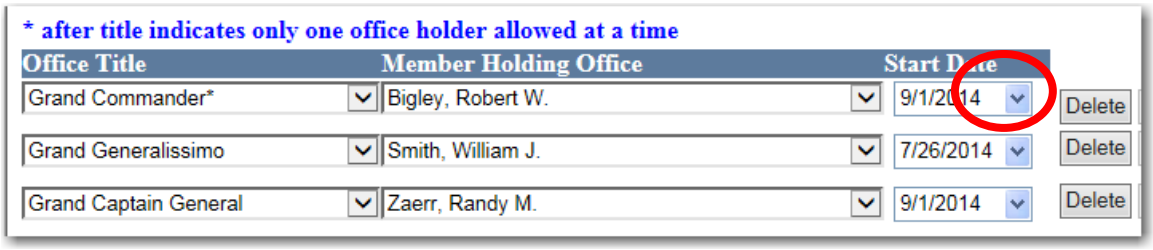


Note: In the top section when you select member drop down list you will get only current or Past Officers of State – to add someone not in this list go to bottom of screen to the add section.

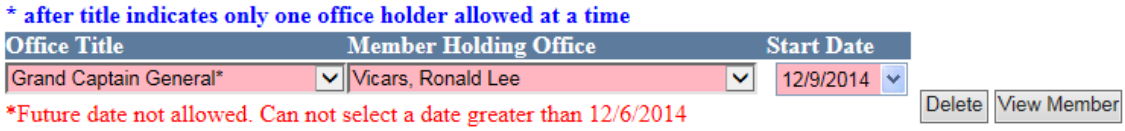
To edit a member who is holding a specific office title, use the drop down to select a new one.



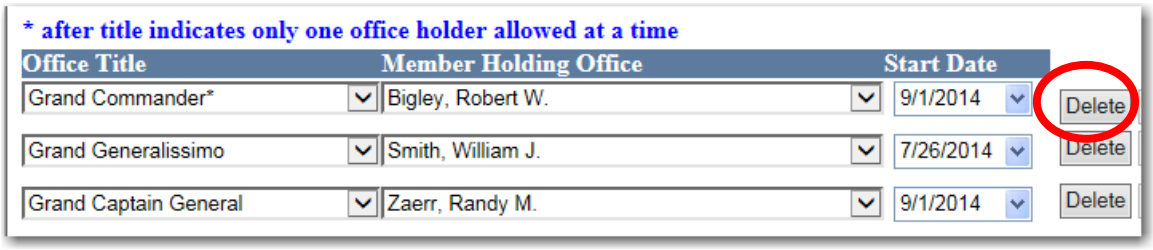
To edit the Start Date for the member holding a specific office title, use the drop down and select one. ***NOTE: the date selected can NOT be more than 10 days in the future.***



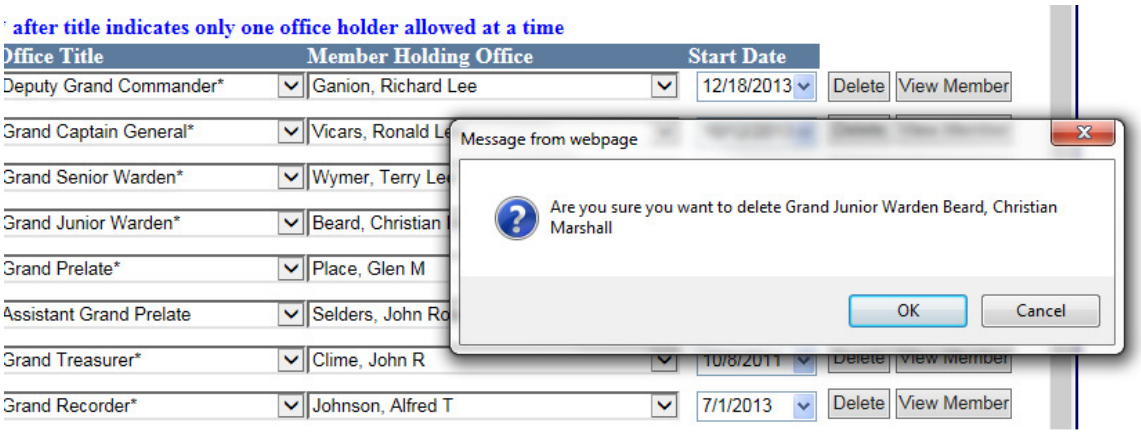
You will see the **Red** error Message if any information is incorrect



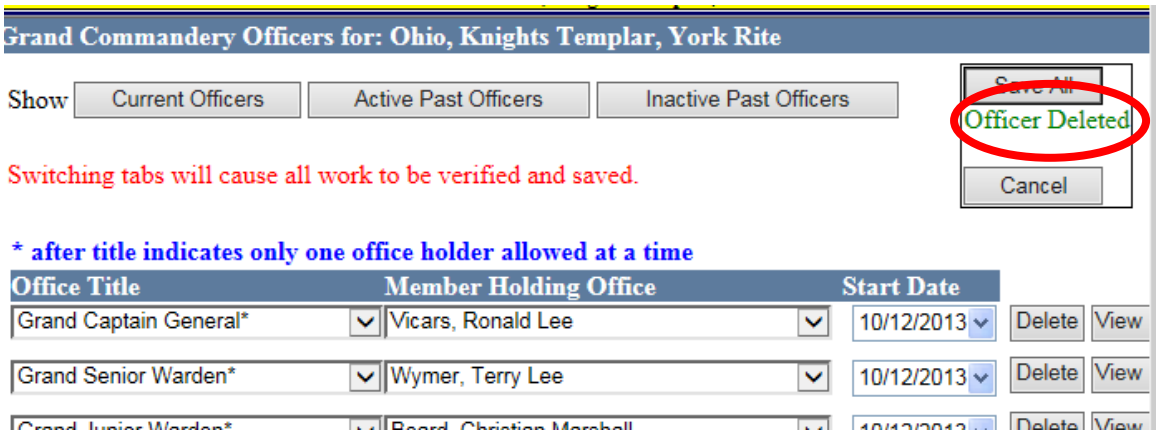
To delete a row all together, use the "Delete" button.



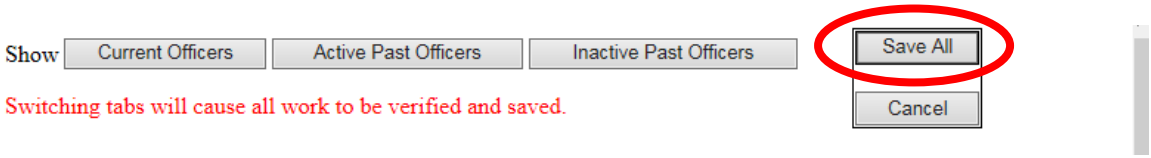
When Deleting a member you will receive a message to re-confirm you want to delete the member. Click OK to Delete



Once you click OK you will see "Officer Deleted" in Green



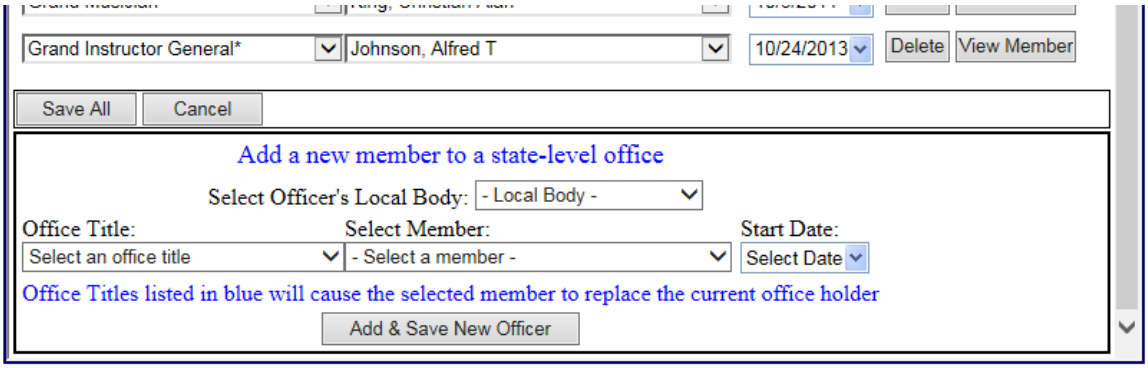
Once all changes are made, click the "Save All" button at the top or bottom of the screen.



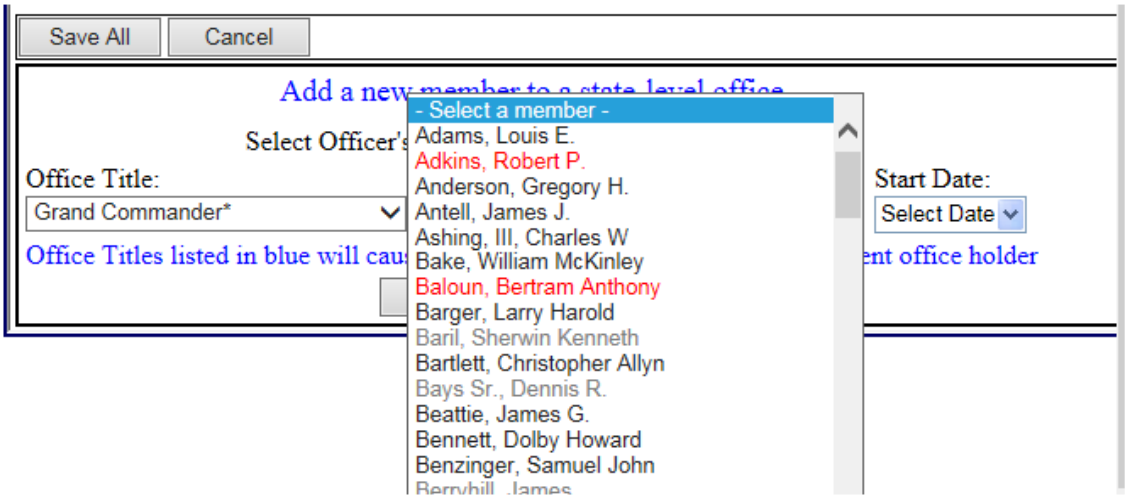
If changes are all accurate you will see the "Officers Saved" message in Green

If any changes are incorrect you will see the **Red** error message and "**Unable to save officers"** message in **Red**

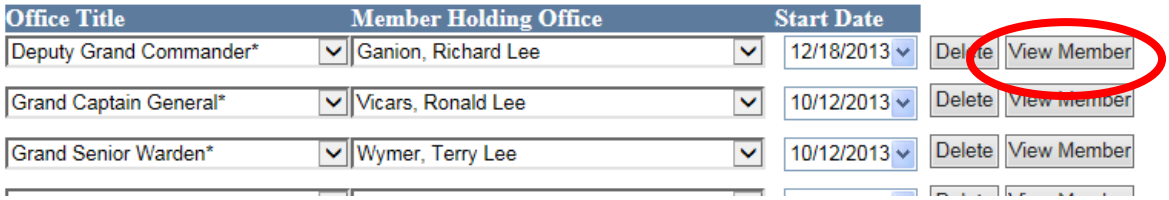
To add a brand new row to the list of officers, scroll down to the bottom of the screen and add the LOCAL Body first, the OFFICE Title, the member name, then start date. Then click the "Add" button.



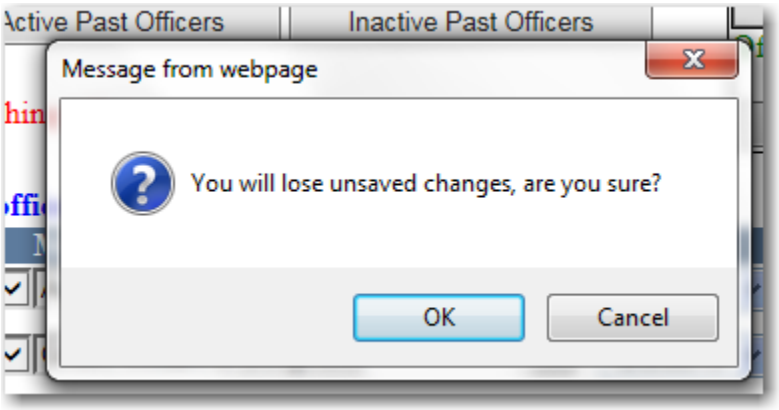
NOTE: At this point the name in the "Select a Member" field will all be members of the Local Body you have selected.
*If a member's name is printed in the drop down in **RED**, the member is deceased. If the member's name is printed in the drop down in **GREY**, the member is alive but in an inactive status. If the member's name is printed in the drop down in **BLACK**, the member is alive and in good standing.*



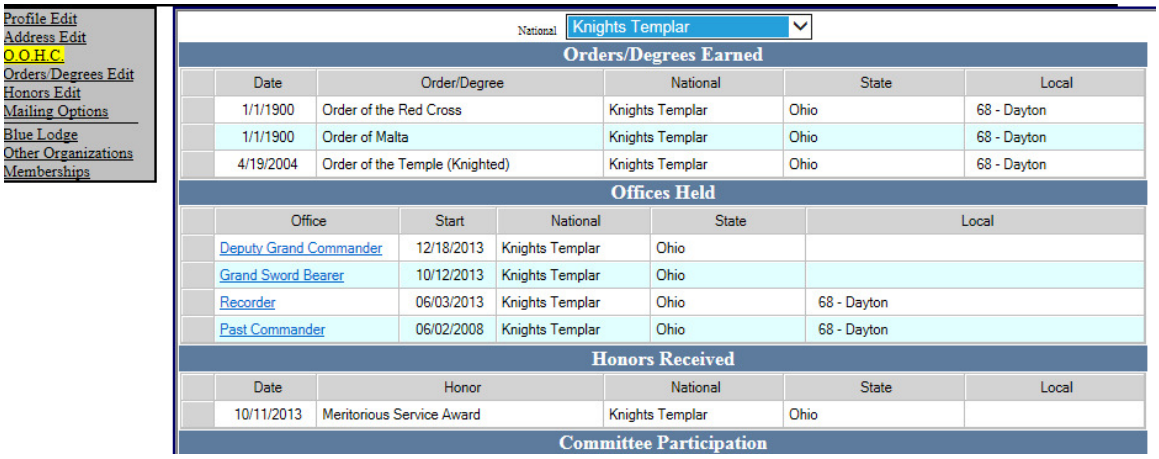
If you would like to go to the member's record, click the View Member button. This feature is available on all 3 Tabs.



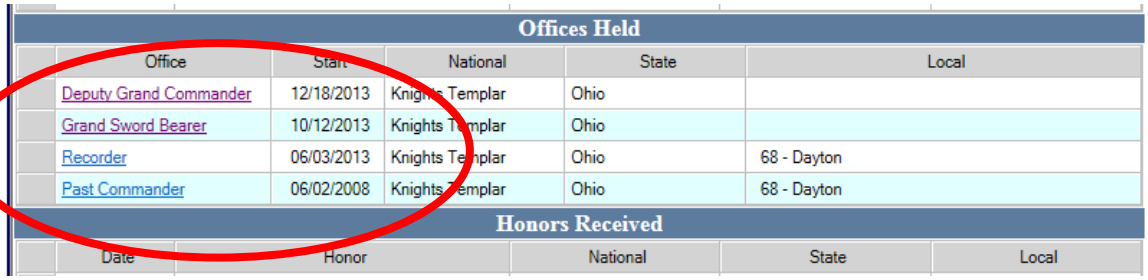
Before leaving this tab the system will remind you to save all changes made before continuing.



If the user clicks “OK”, the system will go directly to the member’s record under the O.O.H.C screen and nothing you have done already will be saved.

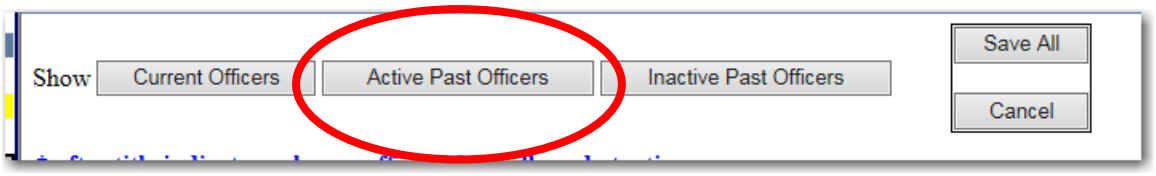


To get back to the Officer-Edit screen, simply click on any of the blue underlined Office Title under the “offices held” area.

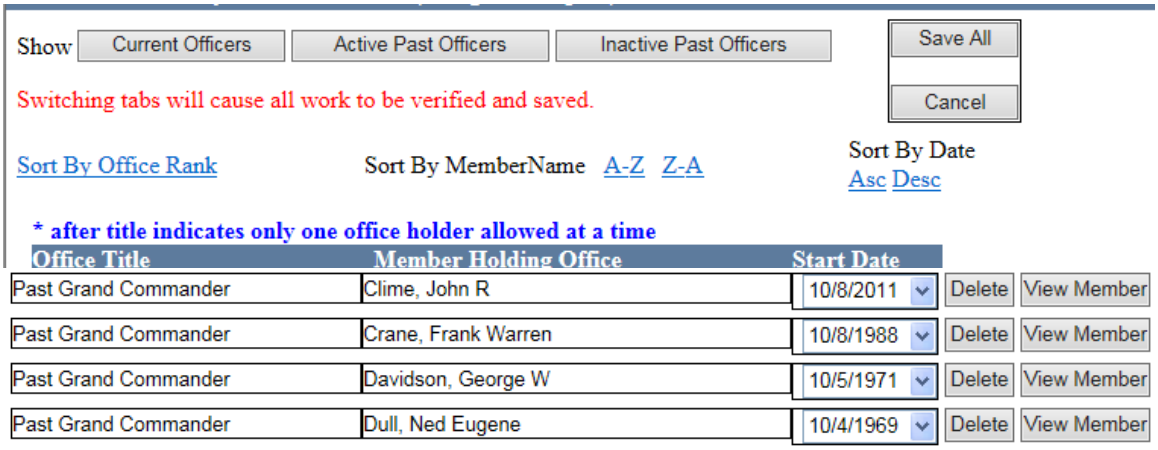


You will now be back to Officers Edit Screen

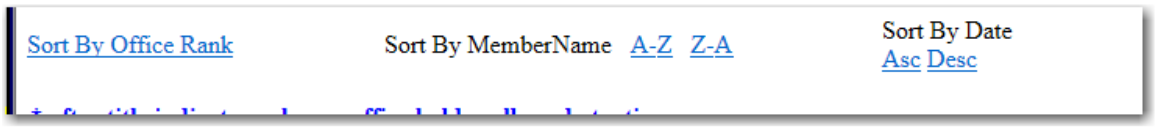
Now lets review the ***Active Past Officers*** tab



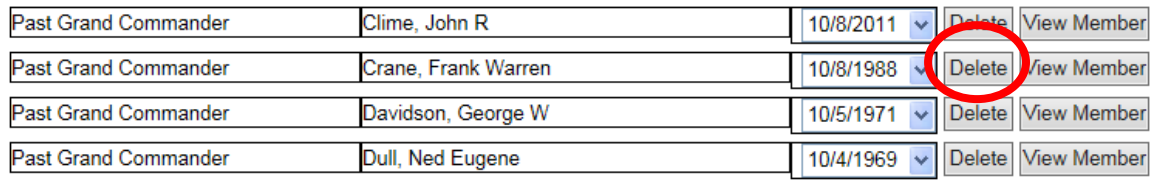
Under the ***Active Past Officers*** tab the user is able to see and edit their living Past Officers.



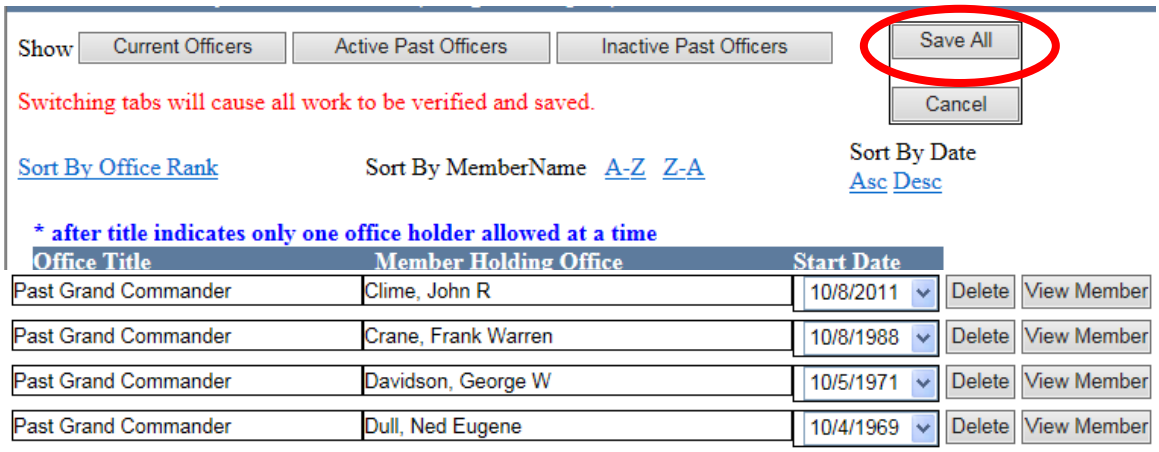
The ***Active Past Officers & Inactive Past Officers*** tab can sort by Office rank, Member name or, Start date.



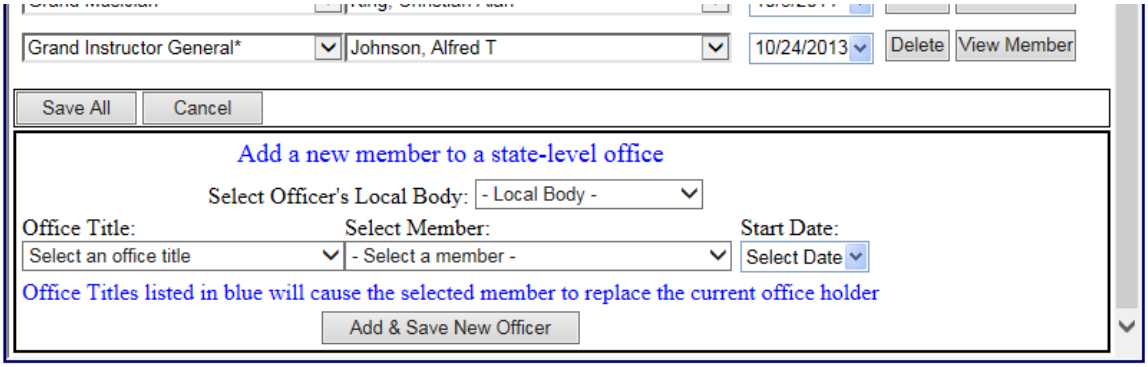
If you need to delete a row all together, use the "Delete" button.



If you have made any changes, click the "Save All" button at the top or bottom of the screen.



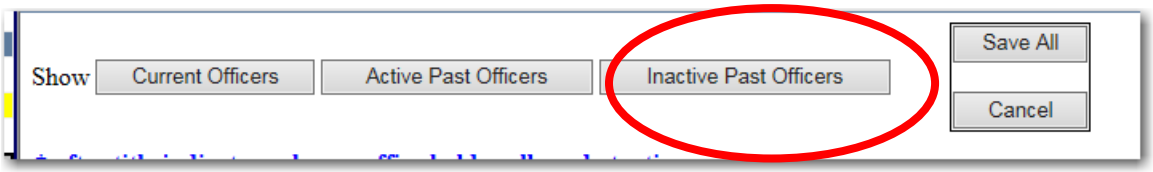
To add a new out going Grand Commander to the list of Active Past Officers, scroll down to the bottom of the screen and add the LOCAL Body first, Then the OFFICE Title, the member name, then start date. Then click the "Add" button.



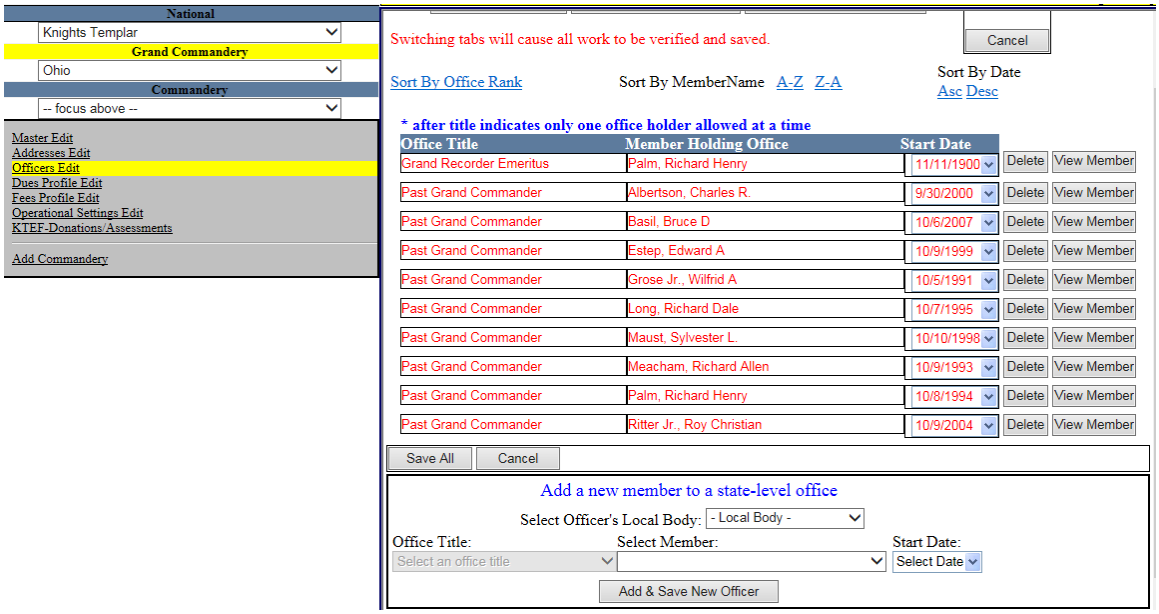
PLEASE NOTE: OUT GOING GRAND COMMANDERS MUST BE MADE A PAST GRAND COMMANDER….. THIS IS NOT DONE AUTOMATICALLY

You can also make him a PAST GRAND COMMANDER in the section above.

Now lets review the ***Inactive Past Officers*** tab

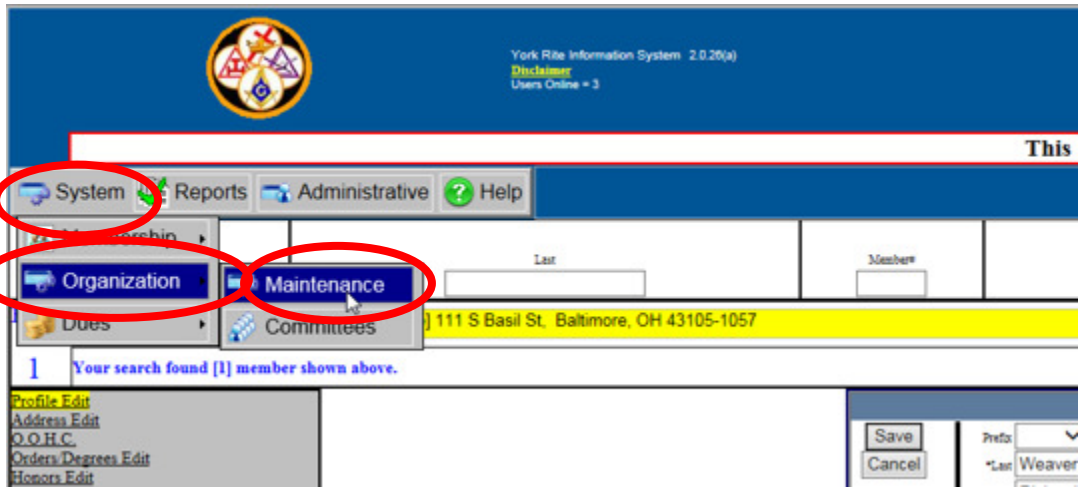


Under the ***Inactive Past Officers*** tab the user is able to see and edit their deceased Past Officers and/or those past Officers that are in an inactive status condition. In addition, you have the ability to add a whole new row to the list of officers shown. All options on this tab are the same as those for "Active Past Officers" tab

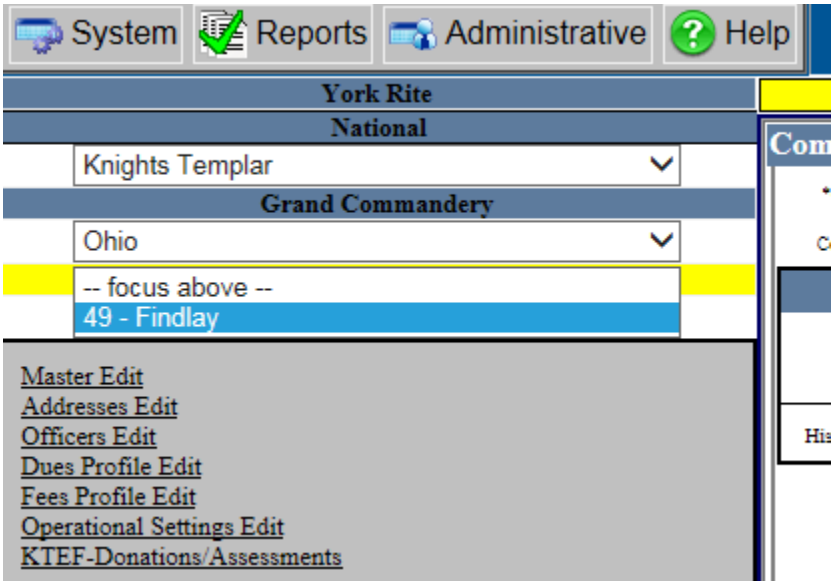


Local Edit

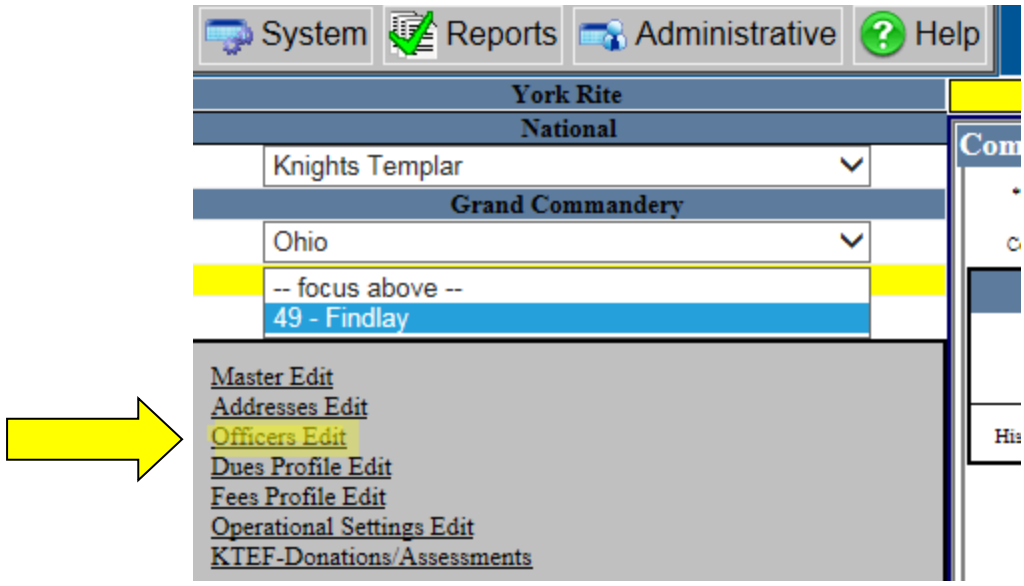
1. Officers Edit Local
    a. Go to System / Organization / Maintenance



    b. This is where you are going to want to chose a Local.



c. Cick on Officer-Edit on the left hand side of screen



The new Officer Module is designed with (3) tabs at the top

1. Current Officers – your current core of Officers
2. Active Past Officers– your Past Officers that are active within YRIS (only contains officers with a title of Past or Emeritus as approved by Grand Encampment)
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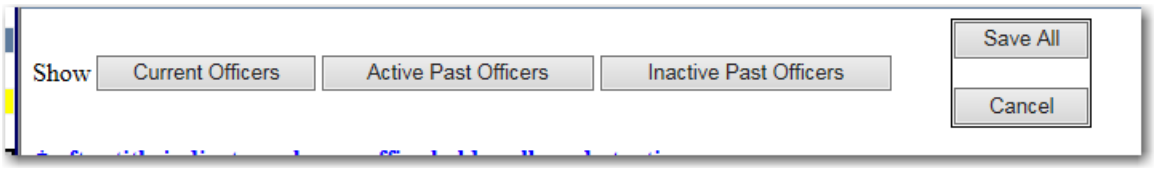
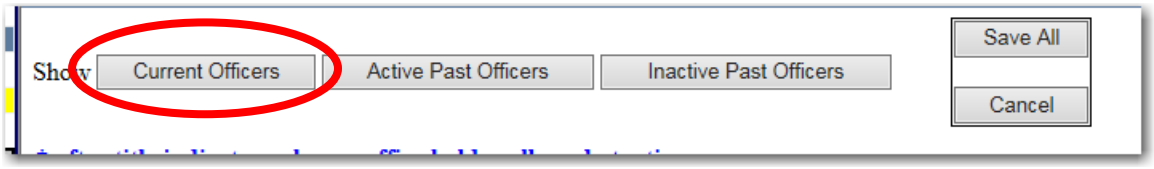


First we will Review the ***Current Officers*** tab.



Under the ***Current Officers*** tab (which is the default tab when the screen opens), the user is able to see, edit, and add all their current officer records.

To edit an office title, use the drop down to select a new one**. NOTE: The * after title indicates only one office holder allowed at a time!**

Note: In the top section when you select member drop down list you will get the full membership of the local body – to add someone not in this list go to bottom of screen to the add section.

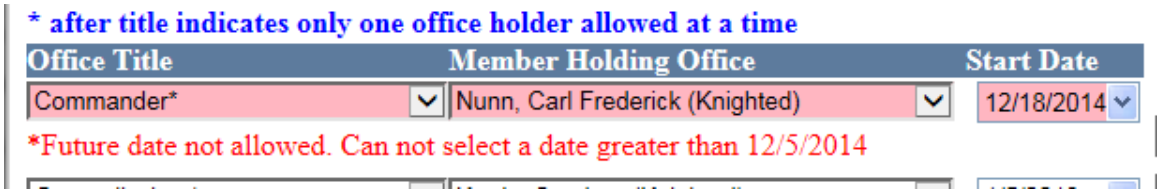
To edit a member who is holding a specific office title, use the drop down to select a new one.

*NOTE: At this point the name in the "Select a Member" field will all be members of the Local Body you have selected. If a member's name is printed in the drop down in **RED**, the member is deceased. If the member's name is printed in the drop down in **GREY**, the member is alive but in an inactive status. If the member's name is printed in the drop down in **BLACK**, the member is alive and in good standing.*

Note: Even though inactive members are shown, only current active members can be on Current Officers tab.

To edit the Start Date for the member holding a specific office title, use the drop down and select one. ***NOTE: the date selected can NOT be more than 10 days in the future.***

You will see the **Red** error Message if any information is incorrect



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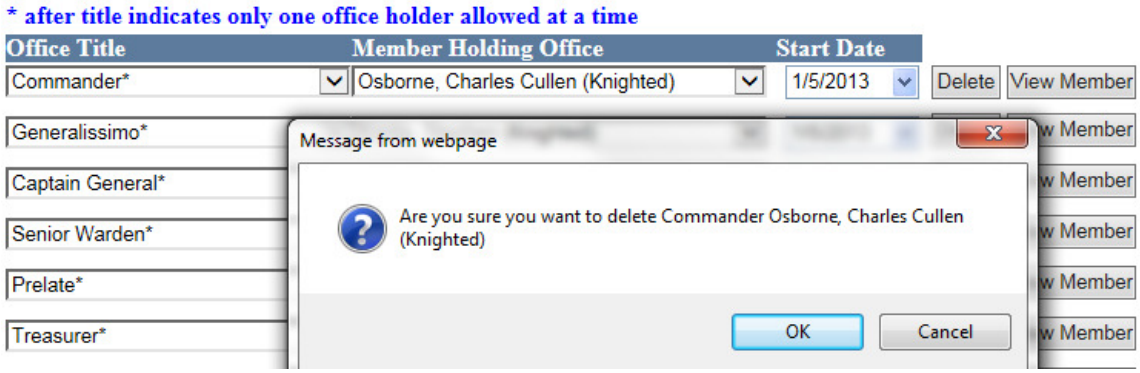
When Deleting a member you will receive a message to re-confirm you want to delete the member. Click OK to Delete

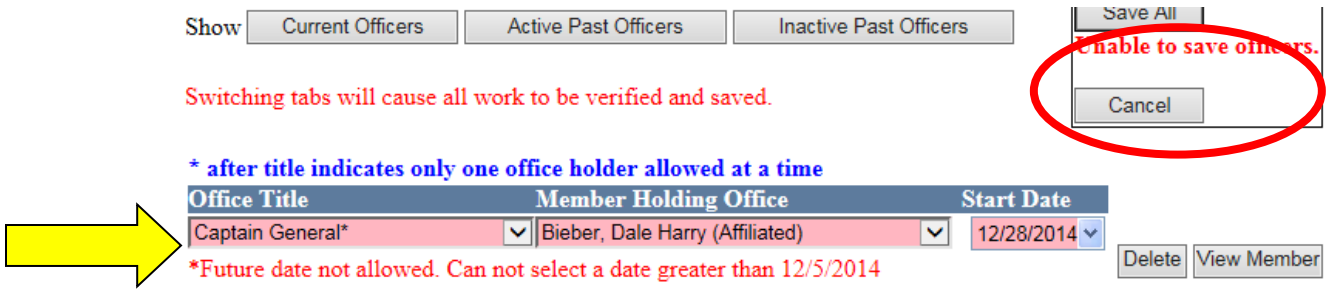


Once you click OK you will see "Officer Deleted" in Green

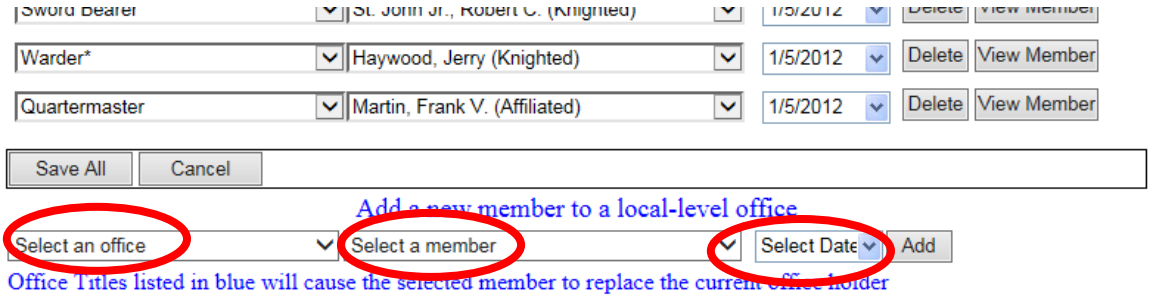
Once all changes are made, click the "Save All" button at the top or bottom of the screen

If changes are all accurate you will see the "Officers Saved" message in Green

If any changes are incorrect you will see the **Red** error message and "**Unable to save officers"** message in **Red**



To add a brand new row to the list of officers, scroll down to the bottom of the screen and add the OFFICE Title, the member name, then start date. Then click the "Add" button.



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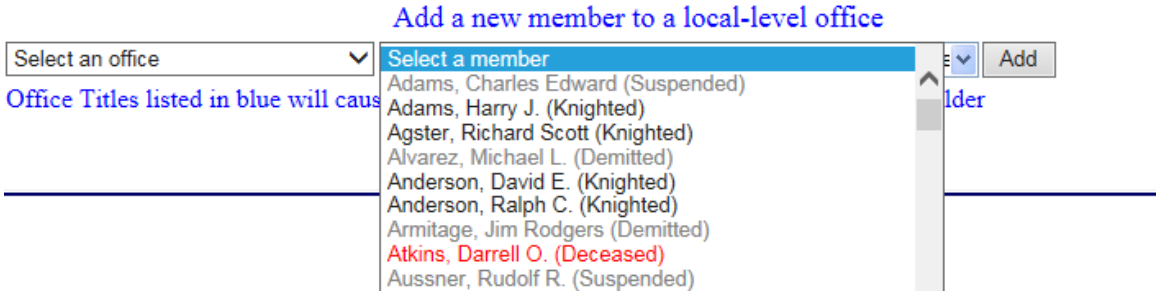

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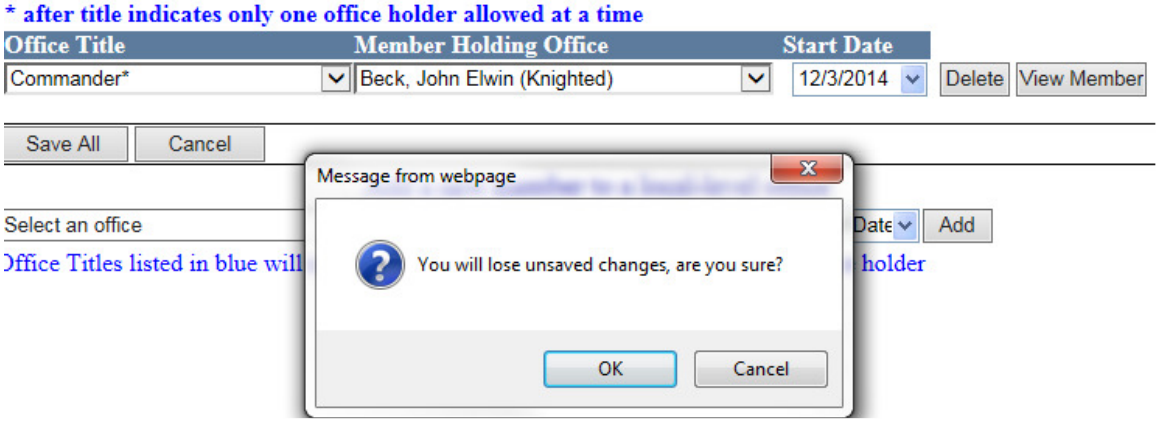
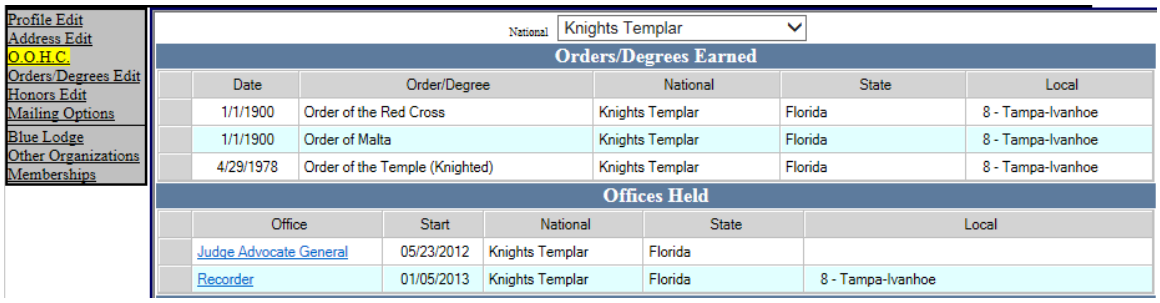
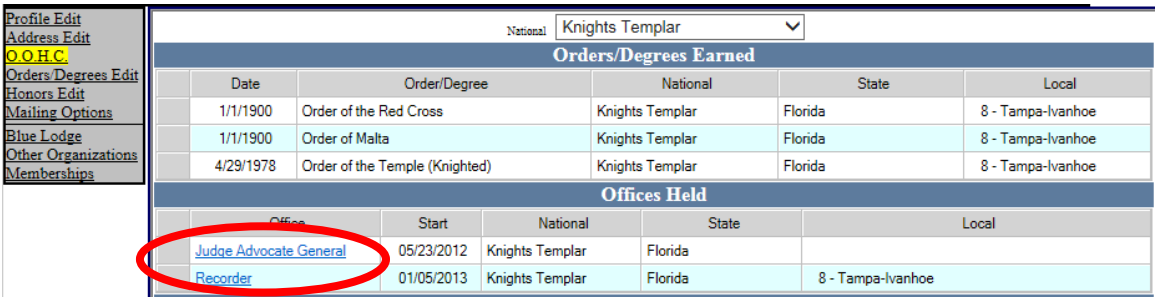


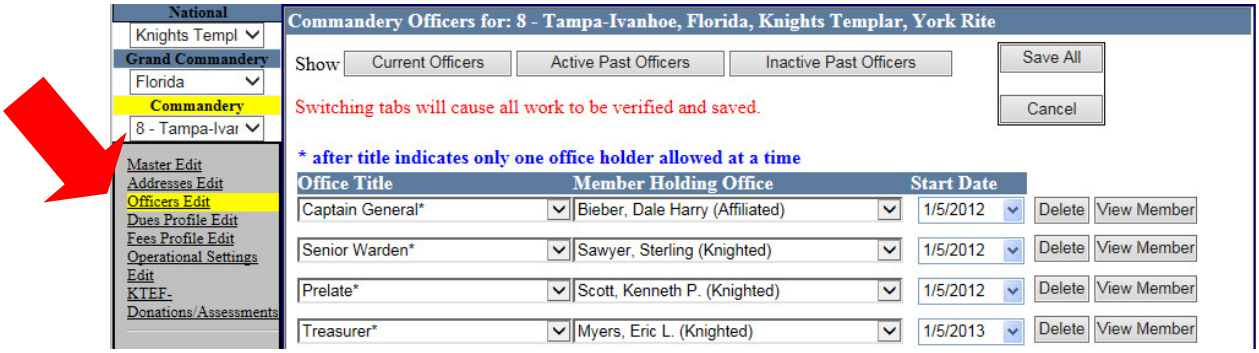
If the user clicks "OK", the system will go directly to the member's record under the O.O.H.C screen and nothing you have done already will be saved.



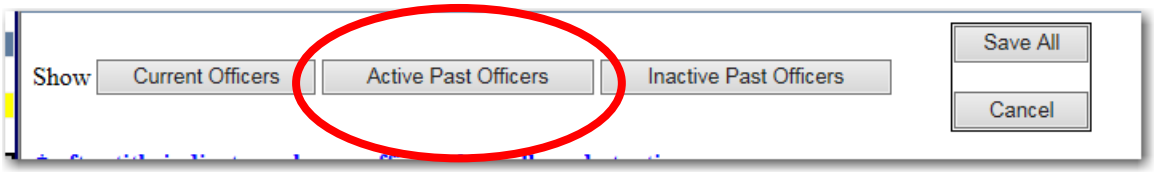
To get back to the Officer-Edit screen, simply click on any of the blue underlined Office Title under the "offices held" area.



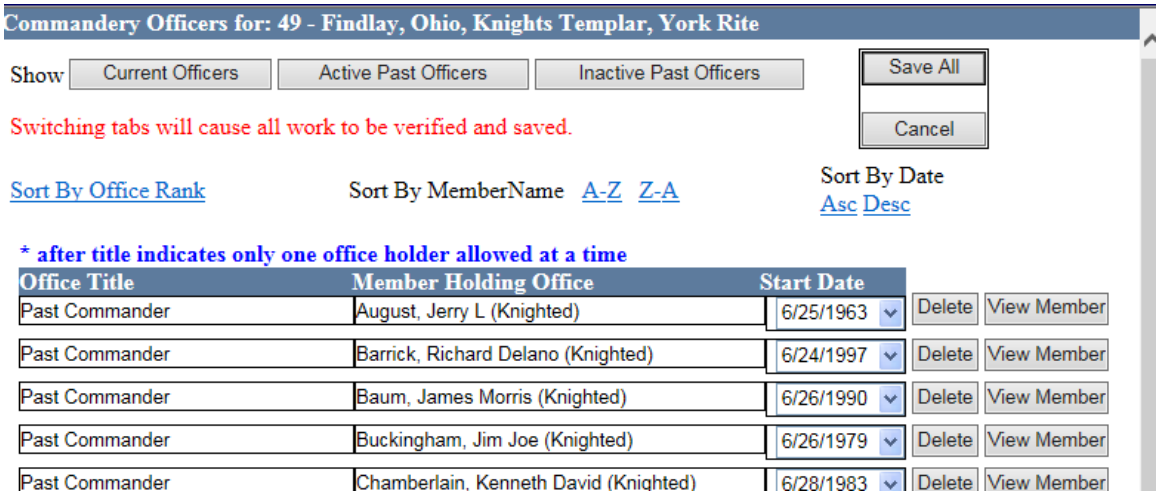
You will now be back to Officers Edit Screen



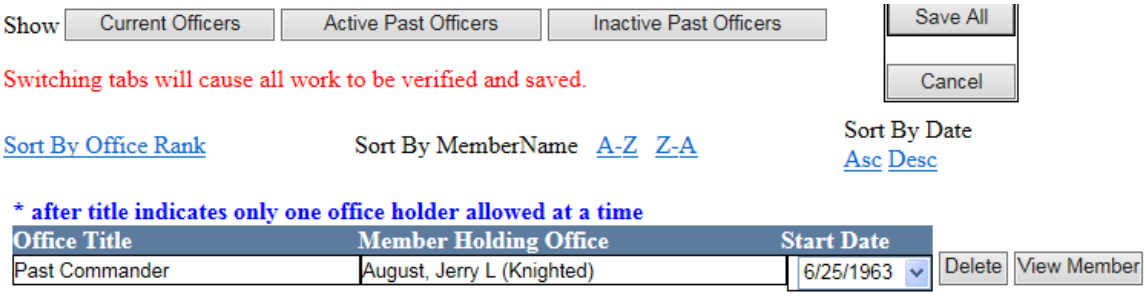
Now lets review the ***Active Past Officers*** tab



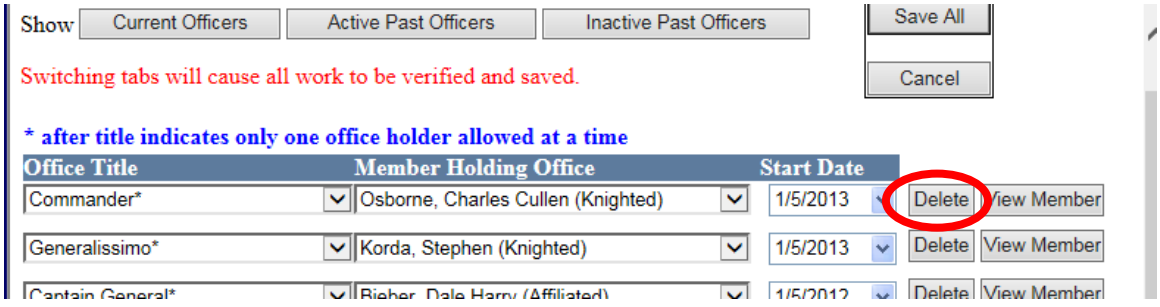
Under the ***Active Past Officers*** tab the user is able to see and edit your living Past Officers.



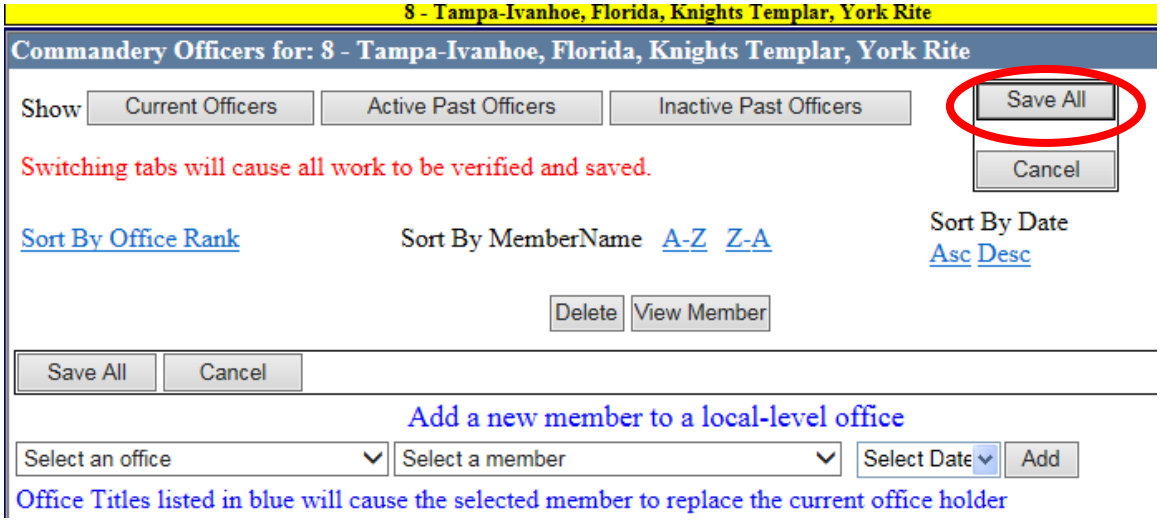
The ***Active Past Officers & Inactive Past Officers*** tab can sort by Office rank, Member name or, Start date.



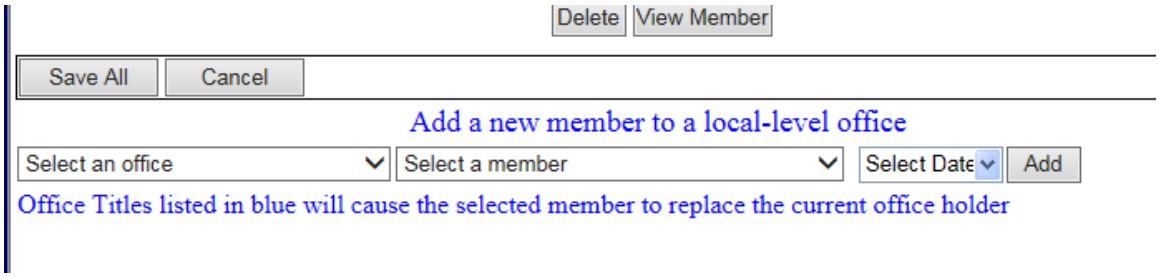
If you need to delete a row all together, use the "Delete" button



If you have made any changes, click the "Save All" button at the top or bottom of the screen.

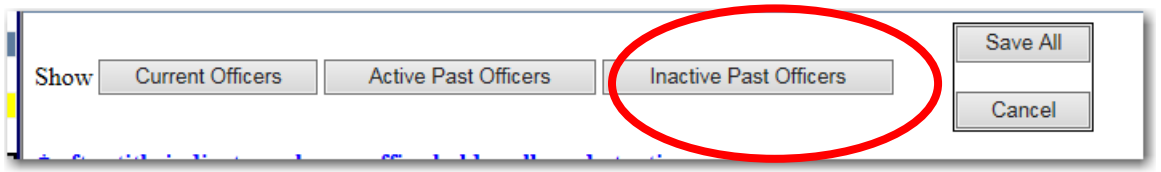
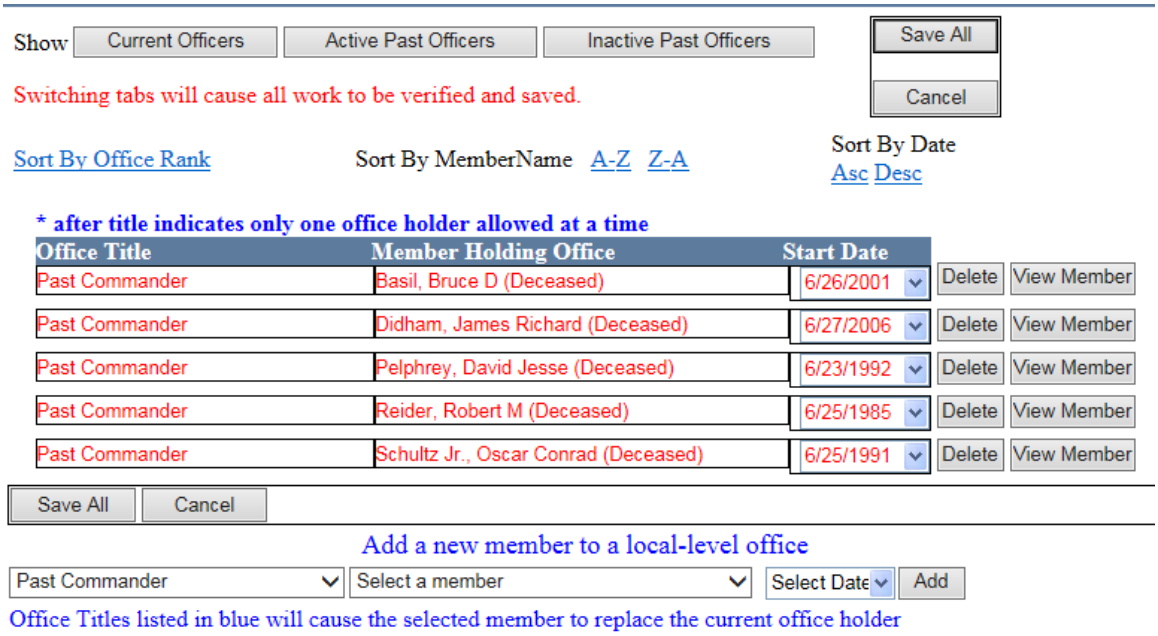


To add a new out going Commander to the list of Active Past Officers, scroll down to the bottom of the screen and add the OFFICE Title, the member name, then start date. Then click the "Add" button.



PLEASE NOTE: OUT GOING COMMANDERS MUST BE MADE A PAST COMMANDER….. THIS IS NOT DONE AUTOMATICALLY
You can also make him a PAST COMMANDER in the section above.

Now lets review the ***Inactive Past Officers*** tab



Under the ***Inactive Past Officers*** tab the user is able to see and edit their deceased Past Officers and/or those past Officers that are in an inactive status condition. In addition, you have the ability to add a whole new row to the list of officers shown. All options on this tab are the same as those for "Active Past Officers" tab