Masonic Membership Solutions



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.

> Published November 2014 Version 2.0.26



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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

	York Rite Information System 2.0.26(a) Disclamer Users Online = 3	
		This
(🤝 System 🥸 Reports 📼 Administrative 🔞 Help	
(Crganization	
	Dues Committees] 111 S Basil St. Baltimore, OH 43105-1057	
	1 Your search found [1] member shown above.	
	Profile Edit Address Edit O.O.H.C. Orders/Degrees Edit Honors Edit Honors Edit	Weaver



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

🤜 System	V Reports	🛋 Administrative	🕜 He			
	York	: Rite				
	Nati	ional				
Knights T	「emplar	×	 Image: A set of the set of the			
	Grand Co	mmandery				
Ohio		`	 Image: A set of the set of the			
	Commandery					
focus a	focus above V					
<u>Master Edit</u> <u>Addresses Edit</u> <u>Officers Edit</u> <u>Dues Profile Edi</u> Fees Profile Edi	<u>it</u> t					

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

Knights Templar	~
Grand Command	lery
Ohio	~
Commandery	
focus above	~
Master Edit Addresses Edit Officers Edit Dues Profile Edit Fees Profile Edit Operational Settings Edit KTEF-Donations/Assessments Add Commandery	



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)

h				Save All
l	Show Current Officers	Active Past Officers	Inactive Past Officers	
Н				Cancel
Ц				

First we will Review the *Current Officers* tab.

Show	Current Officers	Active Past Officers	Inactive Past Officers	Save All
Shev	ouncil officers	Active Fast Officers	indeave Fast Onicers	Cancel

Under the <u>*Current Officers*</u> 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!**

* after title indicates only one office holder allowed at a time				
Office Title	Member Holding Office	Start Date		
Grand Commander*	ligley, Robert W.	9/1/2014 🗸	Delete	
Grand Generalissimo	Smith, William J.	✓ 7/26/2014 ✓	Delete	
Grand Captain General	Zaerr, Randy M.	9/1/2014 🗸	Delete	

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.

* after title indicates only one office holder allowed at a time				
Office Title	Member Holding Office	Start Date		
Grand Commander*	Bigley, Robert W.	V/1/2014 V	Delete	
Grand Generalissimo	Smith, William J.	7/26/2014 🗸	Delete	
Grand Captain General	Zaerr, Randy M.	9/1/2014 🗸	Delete	

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.*

* after title indicates only one office holder allowed at a time				
Office Title	Member Holding Office	Start Date		
Grand Commander*	Bigley, Robert W.	9/1/2014 V Delete		
Grand Generalissimo	Smith, William J.	✓ 7/26/2014 ∨ Delete		
Grand Captain General	Zaerr, Randy M.	✓ 9/1/2014 ✓ Delete		

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

* after title indicates only	one office holder allowed at a time				
Office Title	Member Holding Office		Start Date		
Grand Captain General*	Vicars, Ronald Lee	~	12/9/2014 💌		
*Future date not allowed.	Can not select a date greater than 12/6/2014			Delete	View Me

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

* after title indicates only one office holder allowed at a time				
Office Title	Member Holding Office	Start Date		
Grand Commander*	Bigley, Robert W.	9/1/2014 V Delete		
Grand Generalissimo	Smith, William J.	✓ 7/26/2014 ✓ Delete		
Grand Captain General	Zaerr, Randy M.	✓ 9/1/2014 ✓ Delete		



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

Office Title	Member Holding (Office	Sta	rt Date		
Deputy Grand Commander*	Ganion, Richard Lee	[✓ 12	2/18/2013 🗸	Delete View Me	ember
Grand Captain General*	Vicars, Ronald Le Me	essage from webpage	10		Canada Mana Ma	
Grand Senior Warden*	Wymer, Terry Lee					
Grand Junior Warden*	Beard, Christian I	Are you sure yo Marshall	ou want f	to delete Gran	d Junior Warden Be	ard, Christian
Grand Prelate*	✓ Place, Glen M					
Assistant Grand Prelate	Selders, John Ro				ОК	Cancel
Grand Treasurer*	Clime, John R		v] 10	1/8/2011		Indune
Grand Recorder*	✓ Johnson, Alfred T	[✓ 7/	1/2013 🗸	Delete View Me	ember

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

Grand Commandery Officers for: Ohio, Knights Templar, York Rite								
Show[Current Officers	Active Past Officers	Inactive Past Officer	s Off	icer Deleted			
Switch	Switching tabs will cause all work to be verified and saved.							
* after	r title indicates only (one office holder allowed a	at a time					
Office	Title	Member Holding O	Office	Start Date				
Grand	Captain General*	Vicars, Ronald Lee	~	10/12/2013 🗸	Delete View			
Grand	Senior Warden*	Wymer, Terry Lee	~	10/12/2013 🗸	Delete View			
Crond	lupior Mardon*	Reard Christian Mara	hall rel	40/40/0040	Delete View			

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

Show	Current Officers	Active Past Officers	Inactive Past Officers	C	Save All	
Switch	ning tabs will cause al	l work to be verified and sa	ved.		Cancel	



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

Show Current Officers	Active Past Officers Inac	tive Past Officers	Saved
Switching tabs will cause al	l work to be verified and saved.	Cance	
* after title indicates only	one office holder allowed at a time	e	
Office Title	Member Holding Office	Start Date	
Deputy Grand Commander*	Ganion, Richard Lee	✓ 12/1/2013 ✓ Dele	te View Member

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

Show	Current Officers	Active Past Officers	Inactive Past Officer	s Un	Save All able to save officers
Switch	hing tabs will cause all	work to be verified and sa	wed.		Cancel
Offic	e Title	Member Holding	Office	Start Date	
Deput	ty Grand Commander*	Ganion, Richard Lee	~	12/8/2014 💌	
Error	*Future date not allowe	ed. Can not select a date g	reater than 11/29/2014		Delete View Member
Grand	Captain General*	Vicars, Ronald Lee	~	10/12/2013 🗸	Delete View Member

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.

Grand Instructor General*	Johnson, Alfred T	✓ 10/24/2013 ✓ Delete View Member					
Save All Cancel							
A Sele	Add a new member to a state-level office						
Office Title:	Select Member:	Start Date:					
Select an office title	✓ - Select a member -	✓ Select Date ✓					
Office Titles listed in blu	ie will cause the selected member to re	place the current office holder					
	Add & Save New Officer						



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.

Save All Cancel		
Add a new Select Officer's Office Title: Grand Commander* \v Office Titles listed in blue will cau	- Select a member - Adams, Louis E. Adkins, Robert P. Anderson, Gregory H. Antell, James J. Ashing, III, Charles W Bake, William McKinley Baloun, Bertram Anthony Barger, Larry Harold Baril, Sherwin Kenneth Bartlett, Christopher Allyn Bays Sr., Dennis R. Beattie, James G. Bennett, Dolby Howard Benzinger, Samuel John Berryhill James	Start Date: Select Date v ent office holder

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

Office Title	Member Holding Office	Start Date	
Deputy Grand Commander*	Ganion, Richard Lee	✓ 12/18/2013 ✓	Delate View Member
Grand Captain General*	Vicars, Ronald Lee	✓ 10/12/2013 ✓	Delete View Member
Grand Senior Warden*	Wymer, Terry Lee	✓ 10/12/2013 ✓	Delete View Member

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

Active Past Officers	Inactive Past Officers
Message from webpa	age 📃 🔤 📔
hin	
offic ? You will I	lose unsaved changes, are you sure?
<u>-</u>	OK Cancel
JI.	



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.

Profile Edit Address Edit					National Knig	hts Te	mplar	~	
<u>O.O.H.C.</u>	Orders/Degrees Earned								
Orders/Degrees Edit Honors Edit		Date		Order/Degre	ee		National	State	Local
Mailing Options		1/1/1900	Order of the	Red Cross		Knight	s Templar	Ohio	68 - Dayton
Blue Lodge		1/1/1900	Order of Malt	ta		Knight	s Templar	Ohio	68 - Dayton
Other Organizations Memberships		4/19/2004	Order of the	Temple (Knighte	ed)	Knight	s Templar	Ohio	68 - Dayton
						Offic	es Held		
		Offic	æ	Start	National		State		Local
		Deputy Grand C	ommander	12/18/2013	Knights Templar		Ohio		
		Grand Sword Be	arer	10/12/2013	Knights Templar		Ohio		
		Recorder		06/03/2013	Knights Templar		Ohio	68 - Dayton	
		Past Commande	<u>er</u>	06/02/2008	Knights Templar		Ohio	68 - Dayton	
					H	lonor	s Received		
		Date		Honor			National	State	Local
		10/11/2013	Meritorious S	ervice Award		Knight	s Templar	Ohio	
					Com	mittee	Participation		

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

	Offices Held						
	Office	Stan	National	State		Local	
	Deputy Grand Commander	12/18/2013	Knights Templar	Ohio			
	Grand Sword Bearer	10/12/2013	Knights Templar	Ohio			
	Recorder	06/03/2013	Knights Templar	Ohio	68 - Dayton		
V	Past Commander	06/02/2008	Knights 7 emplar	Ohio	68 - Dayton		
	Honors Received						
	Date	Honor		National	State	Local	

You will now be back to Officers Edit Screen

· · · · · · · · · · · · · · · · · · ·		System 🕨 Organizat	ion 🕨 Maintenance [Officers Edit]	2300[2
York Rite		Ohio, Knights Ter	nplar, York Rite	
National	Grand Commandery Officer	rs for: Ohio, Knights Templar.	York Rite	
Knights Templar 🗸 🗸		······		
Grand Commandery	Show Current Officers	Active Past Officers In	active Past Officers	Save All
Ohio 🗸				
Commandery	Switching tabs will cause all	work to be verified and saved.		Cancel
- focus above 🗸 🗸				
laster Edit	* after title indicates only o	ne office holder allowed at a ti	me	
Addresses Edit	Office Title	Member Holding Office	Start Da	te
Officers Edit	Deputy Grand Commander*	✓ Ganion, Richard Lee	✓ 12/18/20	013 View Member
Fees Profile Edit				Delete Marsher
Operational Settings Edit	Grand Captain General*	Vicars, Ronald Lee	✓ 10/12/20	Delete View Member
KTEF-Donations/Assessments	Grand Senior Warden*	Wymer, Terry Lee	✓ 10/12/20)13 View Member



Now lets review the Active Past Officers tab



Under the <u>Active Past Officers</u> tab the user is able to see and edit their living Past Officers.

Show Current Officers	Active Past Officers Inactive Past Offic	ers Save All
Switching tabs will cause a	Il work to be verified and saved.	Cancel
Sort By Office Rank	Sort By MemberName <u>A-Z</u> $Z-A$	Sort By Date <u>Asc Desc</u>
* after title indicates on	ly one office holder allowed at a time	
Office Title	Member Holding Office	Start Date
Past Grand Commander	Clime, John R	10/8/2011 🗸 Delete View Member
Past Grand Commander	Crane, Frank Warren	10/8/1988 🔽 Delete View Member
Past Grand Commander	Davidson, George W	10/5/1971 🔽 Delete View Member
Past Grand Commander	Dull, Ned Eugene	10/4/1969 View Member

The <u>Active Past Officers & Inactive Past Officers</u> tab can sort by Office rank, Member name or, Start date.

Sort By Office Rank	Sort By MemberName <u>A-Z</u> <u>Z-A</u>	Sort By Date <u>Asc Desc</u>
+ 0 (11 11)	1 0° 1 11 11 1 4 4'	

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

Past Grand Commander	Clime, John R	10/8/2011	✓ Delete	View Member
Past Grand Commander	Crane, Frank Warren	10/8/1988	 Delete 	/iew Member
Past Grand Commander	Davidson, George W	10/5/1971	✓ Delete	View Member
Past Grand Commander	Dull, Ned Eugene	10/4/1969	✓ Delete	View Member



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

Show Current Officers	Active Past Officers	Inactive Past Offi	cers	Save All
Switching tabs will cause all work to be verified and saved.				Cancel
Sort By Office Rank	Sort By MemberNa	me <u>A-Z</u> <u>Z-A</u>	Sort By <u>Asc Des</u>	Date sc
* after title indicates only	y one office holder allowed	at a time		
Office Title	Member Holding	Office	Start Date	
Past Grand Commander	Clime, John R		10/8/2011 🗸	Delete View Member
Past Grand Commander	Crane, Frank Warren		10/8/1988 🗸	Delete View Member
Past Grand Commander	Davidson, George W		10/5/1971 🗸	Delete View Member
Past Grand Commander	Dull, Ned Eugene		10/4/1969 🗸	Delete View Member

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.

	,	
Grand Instructor Gene	ral* Johnson, Alfred T	✓ 10/24/2013 ✓ Delete View Member
Save All Can	:el	
	Add a new member to a state-level offic	ce
:	Select Officer's Local Body: - Local Body -	\checkmark
Office Title:	Select Member:	Start Date:
Select an office title	✓ - Select a member -	✓ Select Date ✓
Office Titles listed in	1 blue will cause the selected member to replace	e the current office holder
	Add & Save New Officer	

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

National			
Knights Templar	Switching tabs will cause all work to be verified and saved. Cancel		Cancel
Commandery Cohio Commandery facus chara	Sort By Office Rank	Sort By MemberName <u>A-Z</u> <u>Z-A</u>	Sort By Date Asc Desc
IOCUS ADOVE V	* after title indicates only	one office holder allowed at a time	
<u>Master Edit</u> <u>Addresses Edit</u>	Office Title	Member Holding Office	Start Date
Officers Edit Dues Profile Edit	Grand Recorder Emerilos		
Fees Profile Edit	Past Grand Commander	Albertson, Charles R.	9/30/2000 View Member
KTEF-Donations/Assessments	Past Grand Commander	Basil, Bruce D	10/6/2007 View Member
Add Commandery	Past Grand Commander	Estep, Edward A	10/9/1999 🗸 Delete View Member
	Past Grand Commander	Grose Jr., Wilfrid A	10/5/1991 View Member
	Past Grand Commander	Long, Richard Dale	10/7/1995 View Member
	Past Grand Commander	Maust, Sylvester L.	10/10/1998 View Member
	Past Grand Commander	Meacham, Richard Allen	10/9/1993 View Member
	Past Grand Commander	Palm, Richard Henry	10/8/1994 View Member
	Past Grand Commander	Ritter Jr., Roy Christian	10/9/2004 🗸 Delete View Member
	Save All Cancel		
	Add	a new member to a state-level office	
	Select C	Officer's Local Body: - Local Body - 🗸	
	Office Title:	Select Member:	Start Date:
	Select an office title	× ×	Select Date
		Add & Save New Officer	



Local Edit

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

	York R8e Information System 2.0.26(a) Disclaimer Users Online = 3	
		This
(System Keports 📑 Administrative 🕜 Help	
(Las Mesher	
	Dues Committees 111 S Basil St, Baltimore, OH 43105-1057	
	1 Your search found [1] member shown above.	
	Profile Edit Address Edit Address Edit Save Orders Degrees Edit Cancel Honors Edit Cancel	fix Veaver

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

-	System	V Reports	administrative	🕜 He	elp	
		York	: Rite		,	
		Nati	ional		Co	
	Knights T	Templar	•	~		
		Grand Co	mmandery			•
	Ohio			>		c
	focus a	above				
	49 - Find	lay				
Ma Ad Off Du Fee Op KT	<u>aster Edit</u> Idresses Edit ficers Edit ies Profile Edi erational Sett 'EF-Donation	<u>it</u> <u>t tings Edit</u> ts/Assessments			H	His



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

🤜 Sy	ystem	C Reports	🛋 Administrative	🕜 He	əlp
		York	Rite		
		Nati	onal		Com
K	Knights T	emplar		~	
		Grand Co	nmandery		· ·
C	Dhio		•	~	0
	- focus al	bove			
4	9 - Findl	ay			
<u>Master</u> <u>Address</u> <u>Officers</u> <u>Dues Pr</u> <u>Fees Pr</u> <u>Operati</u> <u>KTEF-</u>]	Edit ses Edit s Edit rofile Edit rofile Edit ional Setti Donation	<u>t ings Edit</u> s/Assessments			His

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

1. 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)

	Show	Current Officers	Active Past Officers	Inactive Past Officers	Save All
	5110 W	Ourient Onicers	Active Fast Officers	macuve r ast Onicers	Cancel
Ц					

First we will Review the *Current Officers* tab.

Share	Current Officers	Astivo Past Officers	Inactive Past Officers	Save All
Snow	Current Onicers	Active Past Onicers	Inactive Past Officers	
				Cancel



Under the <u>*Current Officers*</u> 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!**

Show Current Officers	Active Past Officers Inactive I	Past Officers	Save All
Switching tabs will cause all v	work to be verified and saved.		Cancel
* after title indicates only o	ne office holder allowed at a time		
Office Title	Member Holding Office	Start Date	
Commander*	Oborne, Charles Cullen (Knighted)	✓ 1/5/2013 ✓	Delete View Member
Generalissimo*	Korda, Stephen (Knighted)	✓ 1/5/2013 ✓	Delete View Member
Cantain General*	Richer Dale Harry (Affiliated)	1/5/2012 🗸	Delete View Member

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.*

Show Current Officers	Active Past Officers Inactive Past	t Officers Save All
Switching tabs will cause	e all work to be verified and saved.	Cancel
* after title indicates or	ly one office holder allowed at a time	
Office Title	Member Holding Office	Stat Dan
Commander*	Osborne, Charles Cullen (Knighted)	1/5/2013 Delete View Member
Generalissimo*	Korda, Stephen (Knighted)	✓ 1/5/2013 ✓ Delete View Member
Cantain General*	Righer Dale Harry (Affiliated)	Delete View Member

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

* after title indicates only one office holder allowed at a time						
Office Title	Member Holding Office		Start Date			
Commander*	Nunn, Carl Frederick (Knighted)	~	12/18/2014 🗸			
*Future date not allowed. C	an not select a date greater than 12/5/2014					

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

Show Current Officers	Active Past Officers Inactive Past	t Officers Save All					
Switching tabs will cause all work to be verified and saved. Cancel							
* after title indicates o	nly one office holder allowed at a time						
Office Title	Member Holding Office	Start Date					
Commander*	Osborne, Charles Cullen (Knighted)	✓ 1/5/2013 Vew Member					
Generalissimo*	✓ Korda, Stephen (Knighted)	✓ 1/5/2013 ✓ Delete View Member					
Cantain General*	Rieber, Dale Harry (Affiliated)	Delete View Member					

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

* after title indicates only one office holder allowed at a time								
Office Title	Member Holding Office	Start Date						
Commander*	Sborne, Charles Cullen (Knighted)	✓ 1/5/2013 ✓	Delete View Member					
Generalissimo*	Message from webpage	No. of the local division of the local divis	w Member					
Captain General*			w Member					
Senior Warden*	Are you sure you want to delete Comn (Knighted)	nander Osborne, Charles	Cullen w Member					
Prelate*	-		w Member					
Treasurer*		ОК	Cancel w Member					



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

o zampa zamaoj zaradaj zangno zamparij zarazato					
Commandery Officers for: 8 - Tampa-Ivanhoe, Florida, Knights Templar, York Rite					
Show Current Officers Active Past Officers Inactive Past Officers Switching tabs will cause all work to be verified and saved.	Save All Officer Deleted Cancel				
* after title indicates only one office holder allowed at a time					

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

Show Current Officers	Active Past Officers Inactive Past	t Officers Save All					
Switching tabs will cause all work to be verified and saved. Cancel							
* after title indicates on	ly one office holder allowed at a time						
Office Title	Member Holding Office	Start Date					
Commander*	✓ Osborne, Charles Cullen (Knighted)	✓ 1/5/2013 ✓ Delete View Member					
Generalissimo*	Korda, Stephen (Knighted)	✓ 1/5/2013 ✓ Delete View Member					
Cantain General*	Ripher Dale Harry (Affiliated)	1/5/2012 Delete View Member					

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

Commandery Officers for: 8 - Tampa-Ivanhoe, Florida, Knights Templar, York Rite						
Show Current Officers	Active Past Officers	Inactive Past Officers	Officers Save			
Switching tabs will cause all work to be verified and saved.						
* after title indicates only one office holder allowed at a time						
Office Title	Member Holding	Office St	art Date			

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

	Show Current Officers	Active Past Officers Inactive Past C		ers		save All able to save officers.
	Switching tabs will cause all	l work to be verified and sa	ved. at a time			Cancel
	Office Title	Member Holding	Office	Star	rt Date	
\	Captain General*	Bieber, Dale Harry (A	ffiliated)	/ 12/	28/2014 🛩	
/	*Future date not allowed. C	an not select a date greater	than 12/5/2014			Delete View Member



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.

Sword bearer	St. John Jr., Robert C. (Knighted)	•	1/5/2012	Delete	
Warder*	Haywood, Jerry (Knighted)	~	1/5/2012	V Delete	/iew Member
Quartermaster	Martin, Frank V. (Affiliated)	~	1/5/2012	V Delete	/iew Member
Save All Cancel					
\frown	Add a new member to a local-lev	vel of	ffice		
Select an office	✓ Select a member	~	Select Date V	Add	
Office Titles listed in blue will	cause the selected member to replace the o	urren	n office hords	er	

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.

Select an office 🗸	Select a member	Add
Office Titles listed in blue will cau	Adams, Charles Edward (Suspended) Adams, Harry J. (Knighted)	 lder
	Agster, Richard Scott (Knighted)	
	Alvarez, Michael L. (Demitted)	
	Anderson, David E. (Knighted)	
	Anderson, Ralph C. (Knighted)	
	Armitage, Jim Rodgers (Demitted)	
	Atkins, Darrell O. (Deceased)	
	Aussner, Rudolf R. (Suspended)	

Add a new member to a local-level office



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

Show Current Officers	Active Past Officers Inactive Past	t Officers Save All				
Switching tabs will cause all work to be verified and saved. Cancel						
* after title indicates onl	y one office holder allowed at a time					
Office Title	Member Holding Office	Start Date				
Commander*	Osborne, Charles Cullen (Knighted)	✓ 1/5/2013 ✓ Delate View Member				
Generalissimo*	Korda, Stephen (Knighted)	✓ 1/5/2013 ✓ Delete View Member				
Cantain General*	Ripher Dale Harry (Affiliated)	View Member				

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

* after title indicates only or	e office holder allowed at a time	
Office Title	Member Holding Office	Start Date
Commander*	Beck, John Elwin (Knighted)	✓ 12/3/2014 ✓ Delete View Member
Save All Cancel	Message from webpage	x
Select an office Office Titles listed in blue will	You will lose unsaved changes, ar	re you sure? Add holder
	ОК	Cancel

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.

<u>Profile Edit</u> Address Edit				National Knig	ghts Te	mplar	~	
0.0.H.C.	Orders/Degrees Earned							
Orders/Degrees Edit Honors Edit	Date		Order/Degre	e		National	State	Local
Mailing Options	1/1/1900	Order of the	Red Cross		Knights	s Templar	Florida	8 - Tampa-Ivanhoe
Blue Lodge	1/1/1900	Order of Malta			Knights Templar F		Florida	8 - Tampa-Ivanhoe
Other Organizations Memberships	4/29/1978	Order of the	Temple (Knighte	d)	Knight	s Templar	Florida	8 - Tampa-Ivanhoe
					Offi	ces Held		
	Offic	ce in the second se	Start	National		State		Local
	Judge Advocate	General	05/23/2012	Knights Templar		Florida		
	Recorder		01/05/2013	Knights Templar		Florida	8 - Tampa-Ivanhoe	



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

<u>Profile Edit</u> Address Edit <mark>O.O.H.C.</mark>					_{National} Knig Orde	ghts Te ers/De	mplar grees Earned	~	
Orders/Degrees Edit Honors Edit		Date		Order/Degre	e		National	State	Local
Mailing Options		1/1/1900	Order of the	Red Cross		Knights	Templar	Florida	8 - Tampa-Ivanhoe
<u>Blue Lodge</u>		1/1/1900	Order of Malta		Knights	Templar	Florida	8 - Tampa-Ivanhoe	
Other Organizations Memberships		4/29/1978	Order of the	Temple (Knighte	d)	Knights	Templar	Florida	8 - Tampa-Ivanhoe
	Offices Held								
		Offic		Start	National		State		Local
		Judge Advocate	General	05/23/2012	Knights Templar		Florida		
		Recorder		01/05/2013	Knights Templar		Florida	8 - Tampa-Ivanhoe	

You will now be back to Officers Edit Screen

National Commandery Officers for: 8 - Tampa-Ivanhoe, Florida, Knights Templar, York Rite							
Knights Templ V			-	Save			
Florida V	Show Current Officers	Active Past Officers Inactive	Past Officers	Jav	5 All		
Commandery	Switching tabs will cause all	work to be verified and saved.		Car	ncel		
8 - Tampa-Ivar 🗸							
Master Edit	* after title indicates only o	one office holder allowed at a time	ne office holder allowed at a time				
Addresses Edit	Office Title	Member Holding Office	Start Da	te			
Dues Profile Edit	Captain General*	Bieber, Dale Harry (Affiliated)	✓ 1/5/2012	✓ D	elete View Member		
Fees Profile Edit Operational Settings Edit	Senior Warden*	Sawyer, Sterling (Knighted)	✓ 1/5/2012	✓ D	elete View Member		
KTEF-	Prelate*	Scott, Kenneth P. (Knighted)	✓ 1/5/2012	✓ D	elete View Member		
Donations/Assessments	Treasurer*	Myers, Eric L. (Knighted)	✓ 1/5/2013	✓ D	elete View Member		

Now lets review the Active Past Officers tab

Show	Current Officers	Active Past Officers	Inactive Past Officers	Save All
÷ 0				Cancel



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

Commandery Officers for: 49 - I	indlay, Ohio, Knights Templar, York Rit	ie	
Show Current Officers A	ctive Past Officers Inactive Past Officer	Sav	ve All
Switching tabs will cause all work	to be verified and saved.	Ca	ncel
Sort By Office Rank	Sort By MemberName <u>A-Z</u> <u>Z-A</u>	Sort By Da Asc Desc	ate
* after title indicates only one o	office holder allowed at a time		
Office Title	Member Holding Office	Start Date	
Past Commander	August, Jerry L (Knighted)	6/25/1963 💌	Delete View Member
Past Commander	Barrick, Richard Delano (Knighted)	6/24/1997 🗸	Delete View Member
Past Commander	Baum, James Morris (Knighted)	6/26/1990 🖌	Delete View Member
Past Commander	Buckingham, Jim Joe (Knighted)	6/26/1979 🗸	Delete View Member
Past Commander	Chamberlain, Kenneth David (Knighted)	6/28/1983 🗸	Delete View Member

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

Show Current Officers Activ	ve Past Officers	Inactive Past Officers		Save All	I	
Switching tabs will cause all work to	be verified and saved.			Cancel		
Sort By Office Rank	Sort By MemberName	<u>A-Z</u> <u>Z-A</u>	Sort E <u>Asc</u> D	By Date Desc		
* after title indicates only one office holder allowed at a time						
Office Title	Member Holding Offic	ce S	tart Date			
Past Commander	August, Jerry L (Knighted)		6/25/1963	Delete	View Member	

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

Show Current Officers	how Current Officers Active Past Officers Inactive Past Officers				
Switching tabs will cause all	Cancel				
* after title indicates only o	one office holder allowed at a time				
Office Title	Member Holding Office	Start Date			
Commander*	Osborne, Charles Cullen (Knighted)	✓ 1/5/2013	Delete View Member		
Generalissimo*	Korda, Stephen (Knighted)	✓ 1/5/2013	✓ Delete View Member		
Cantain General*	Rieber Dale Harry (Affiliated)	1/5/2012	Delete View Member		



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

8 - Tampa-Ivanhoe, Florida, Knights Templar, York Rite							
Commandery Officers for: 8 - Tampa-Ivanhoe, Florida, Knights Templar, York Rite							
Show Current Officers	Active Past Officers	Inactive Past Officers	Save All				
Switching tabs will cause all work to be verified and saved.							
Sort By Office Rank	Sort By MemberNa	me <u>A-Z</u> <u>Z-A</u>	Sort By Date <u>Asc Desc</u>				
Delete View Member							
Save All Cancel							
Add a new member to a local-level office							
Select an office	✓ Select a member	✓ Sele	ct Date 🗸 🛛 Add				
Office Titles listed in blue w	vill cause the selected memb	per to replace the current offi	ce holder				

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.

		Delete View Me	ember
Save All	Cancel		
		Add a new member to a l	ocal-level office
Select an office	e	✓ Select a member	✓ Select Date ✓ Add

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

				Save All
Show	Current Officers	Active Past Officers	Inactive Past Officers	
				Cancel



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

Show Current Officers	Active Past Officers Inactive Past Of	ficers Save All
Switching tabs will cause all we	Cancel	
Sort By Office Rank	Sort By MemberName <u>A-Z</u> <u>Z-A</u>	Sort By Date <u>Asc Desc</u>
* after title indicates only o	ne office holder allowed at a time	
Office Title	Member Holding Office	Start Date
Past Commander	Basil, Bruce D (Deceased)	6/26/2001 🗸 Delete View Member
Past Commander	Didham, James Richard (Deceased)	6/27/2006 🗸 Delete View Member
Past Commander	Pelphrey, David Jesse (Deceased)	6/23/1992 View Member
Past Commander	Reider, Robert M (Deceased)	6/25/1985 🗸 Delete View Member
Past Commander	Schultz Jr., Oscar Conrad (Deceased)	6/25/1991 🗸 Delete View Member
Save All Cancel		
	Add a new member to a local-leve	el office
Past Commander	✓ Select a member	✓ Select Date ✓ Add

Office Titles listed in blue will cause the selected member to replace the current office holder