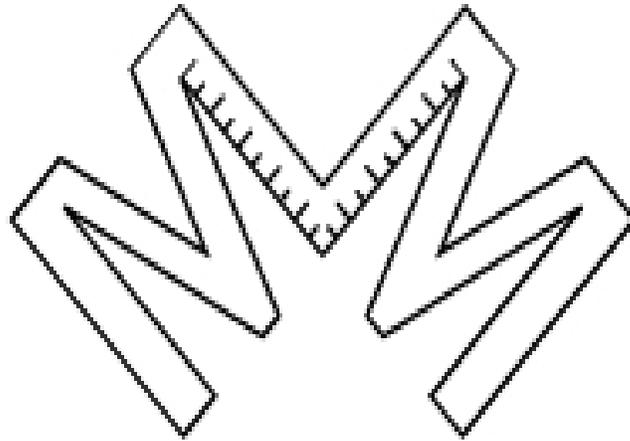


Masonic Membership Solutions



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:

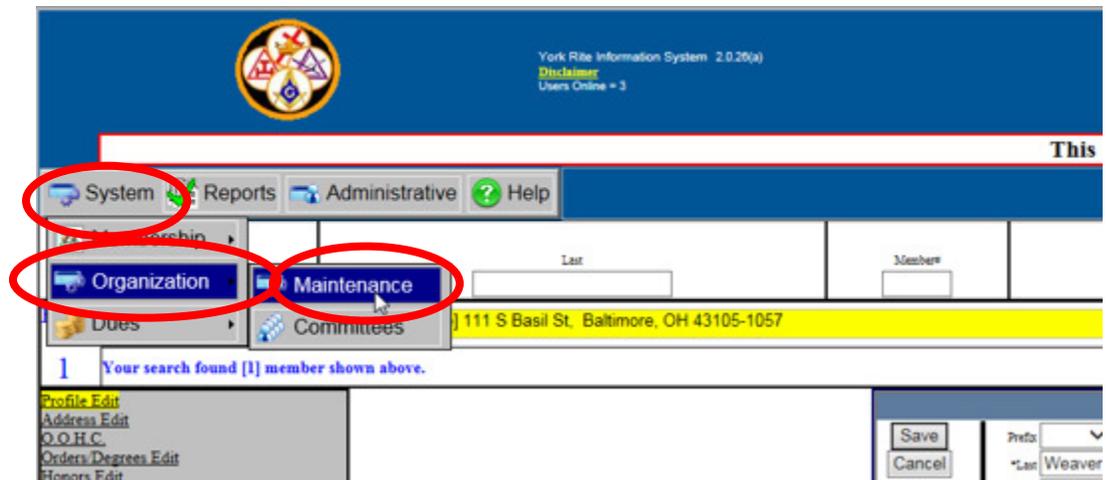
- Current Officers – your current core of Officers
- Active Past Officers – your Past Officers that are active within YRIS (only contains officers with a title of Past or Emeritus as approved by Grand Encampment)
- Inactive Past Officers – your Past Officers that are inactive within YRIS (only contains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



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



The screenshot shows a software interface with the following elements:

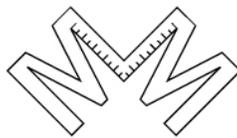
- Navigation tabs: System, Reports (with a green checkmark icon), Administrative, and Help (with a question mark icon).
- York Rite National dropdown menu:
 - Knights Templar
 - Grand Commandery** (highlighted in yellow)
 - Ohio
- Commandery dropdown menu:
 - focus above --
- Left-hand side menu (grey background):
 - [Master Edit](#)
 - [Addresses Edit](#)
 - [Officers Edit](#)
 - [Dues Profile Edit](#)
 - [Fees Profile Edit](#)

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



This screenshot is similar to the one above but includes a yellow arrow pointing to the [Officers Edit](#) link in the left-hand side menu. The menu items are:

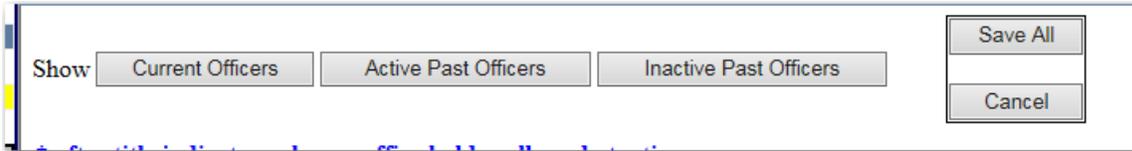
- [Master Edit](#)
- [Addresses Edit](#)
- [Officers Edit](#) (highlighted by a yellow arrow)
- [Dues Profile Edit](#)
- [Fees Profile Edit](#)
- [Operational Settings Edit](#)
- [KTEF-Donations/Assessments](#)
- [Add Commandery](#)



Solutions.

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!**

*** 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	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.	9/1/2014	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	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	Delete View Member

***Future date not allowed. Can not select a date greater than 12/6/2014**

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	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

** after title indicates only one office holder allowed at a time*

Office Title	Member Holding Office	Start Date	Delete	View Member
Deputy Grand Commander*	Ganion, Richard Lee	12/18/2013	Delete	View Member
Grand Captain General*	Vicars, Ronald Lee			
Grand Senior Warden*	Wymer, Terry Lee			
Grand Junior Warden*	Beard, Christian Marshall			
Grand Prelate*	Place, Glen M			
Assistant Grand Prelate	Selders, John R			
Grand Treasurer*	Clime, John R	10/8/2011	Delete	View member
Grand Recorder*	Johnson, Alfred T	7/1/2013	Delete	View Member

Message from webpage

Are you sure you want to delete Grand Junior Warden Beard, Christian Marshall

OK Cancel

Once you click OK you will see “Officer Deleted” in Green

Grand Commandery Officers for: Ohio, Knights Templar, York Rite

Show

Officer Deleted

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	Start Date	Delete	View
Grand Captain General*	Vicars, Ronald Lee	10/12/2013	Delete	View
Grand Senior Warden*	Wymer, Terry Lee	10/12/2013	Delete	View
Grand Junior Warden*	Beard, Christian Marshall	10/12/2013	Delete	View

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

Show

Switching tabs will cause all work to be verified and saved.

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



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	Start Date		
Deputy Grand Commander*	Ganion, Richard Lee	12/1/2013	Delete	View Member

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



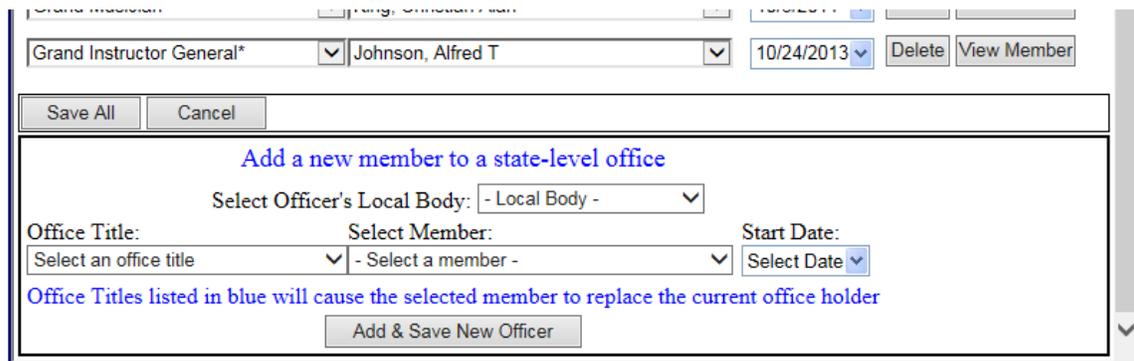
Switching tabs will cause all work to be verified and saved.

* after title indicates only one office holder allowed at a time

Office Title	Member Holding Office	Start Date		
Deputy Grand Commander*	Ganion, Richard Lee	12/8/2014	Delete	View Member
Error *Future date not allowed. Can not select a date greater than 11/29/2014				
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.



Save All Cancel

Add a new member to a state-level office

Select Officer's Local Body: - Local Body -

Office Title: Select Member: Start Date:

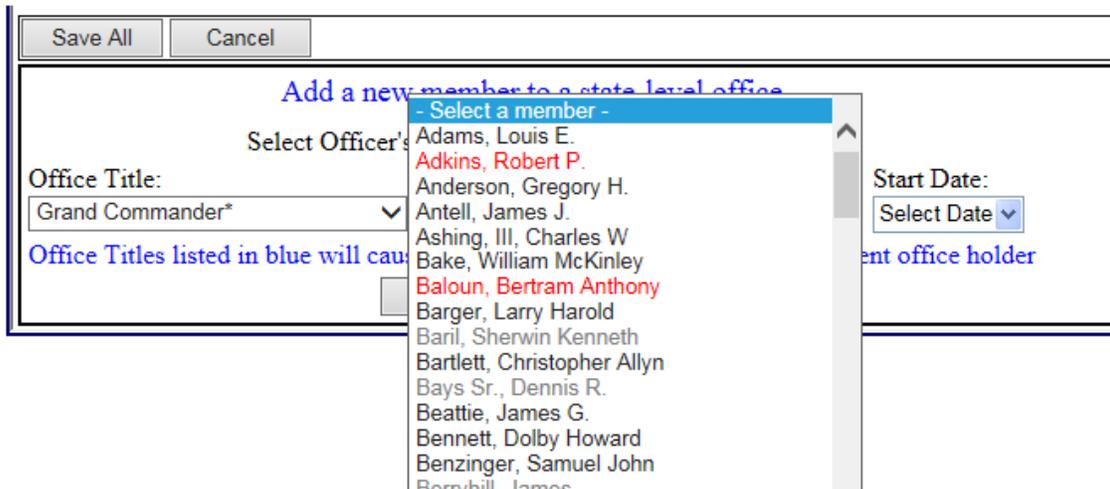
Select an office title - Select a member - Select Date

Office Titles listed in blue will cause the selected member to replace 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.

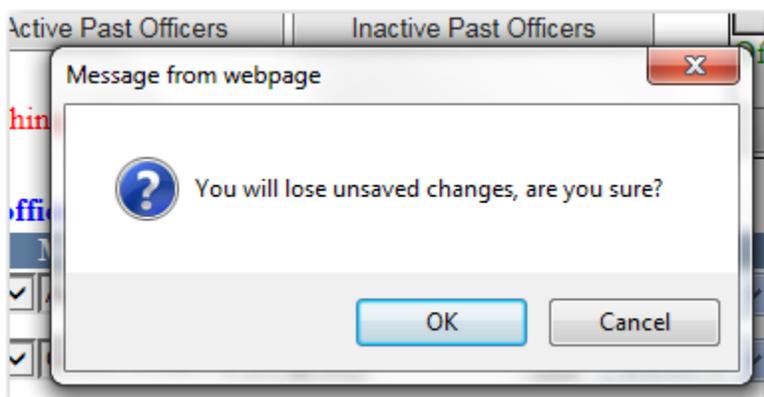
*If a member’s name is printed in the drop down in **RED**, the member is deceased. If the member’s name is printed in the drop down in **GREY**, the member is alive but in an inactive status. If the member’s name is printed in the drop down in **BLACK**, the member is alive and in good standing.*



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	Delete	View Member
Deputy Grand Commander*	Ganion, Richard Lee	12/18/2013	Delete	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.



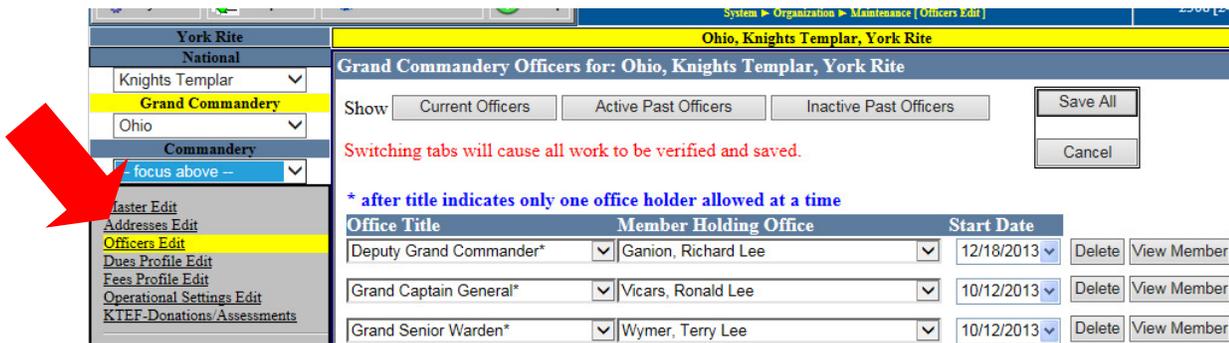
If the user clicks “OK”, the system will go directly to the member’s record under the O.O.H.C screen and nothing you have done already will be saved.

Profile Edit Address Edit O.O.H.C. Orders/Degrees Edit Honors Edit Mailing Options Blue Lodge Other Organizations Memberships		National Knights Templar		
Orders/Degrees Earned				
Date	Order/Degree	National	State	Local
1/1/1900	Order of the Red Cross	Knights Templar	Ohio	68 - Dayton
1/1/1900	Order of Malta	Knights Templar	Ohio	68 - Dayton
4/19/2004	Order of the Temple (Knighted)	Knights Templar	Ohio	68 - Dayton
Offices Held				
Office	Start	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
Past Commander	06/02/2008	Knights Templar	Ohio	68 - Dayton
Honors Received				
Date	Honor	National	State	Local
10/11/2013	Meritorious Service Award	Knights Templar	Ohio	
Committee 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	Start	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
Past Commander	06/02/2008	Knights Templar	Ohio	68 - Dayton

You will now be back to Officers Edit Screen



System ► Organization ► Maintenance (Officers Edit)

York Rite
National
Knights Templar
Grand Commandery
Ohio
Commandery
focus above --

Ohio, Knights Templar, York Rite

Grand Commandery Officers for: Ohio, Knights Templar, York Rite

Show

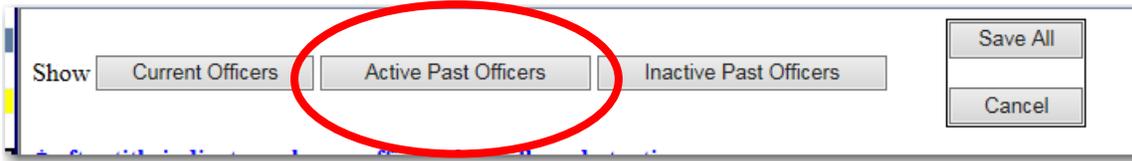
Switching tabs will cause all work to be verified and saved.

* after title indicates only one office holder allowed at a time

Office Title	Member Holding Office	Start Date		
Deputy Grand Commander*	Ganion, Richard Lee	12/18/2013	Delete	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



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.

Switching tabs will cause all work to be verified and saved.

Sort By Office Rank Sort By MemberName [A-Z](#) [Z-A](#) Sort By Date [Asc](#) [Desc](#)

*** after title indicates only 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

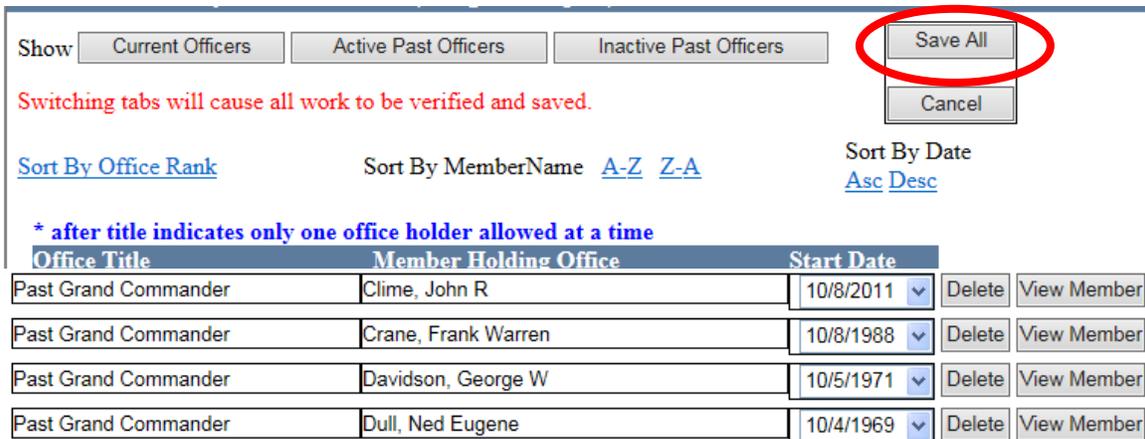
The Active Past Officers & Inactive Past Officers tab can sort by Office rank, Member name or, Start date.



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

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

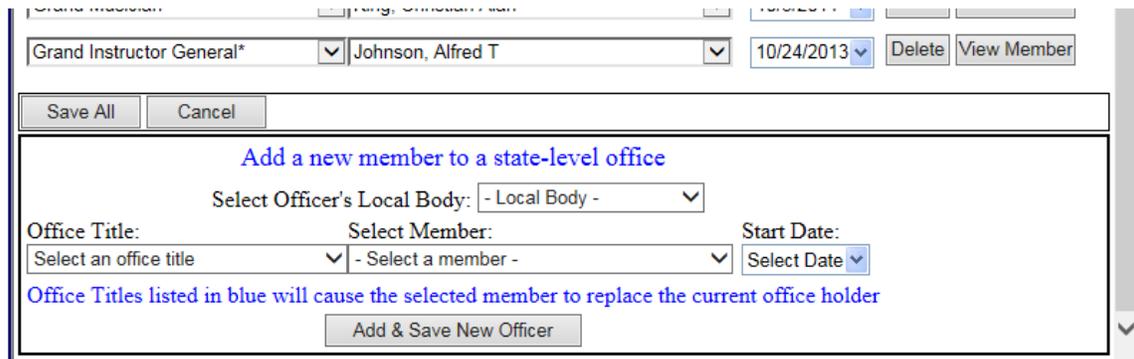
If you have made any changes, click the “Save All” button at the top or bottom of the screen.



Switching tabs will cause all work to be verified and saved.

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.



Add a new member to a state-level office

Select Officer's Local Body: - Local Body -

Office Title: Select Member: Start Date:

Select an office title - Select a member - Select Date

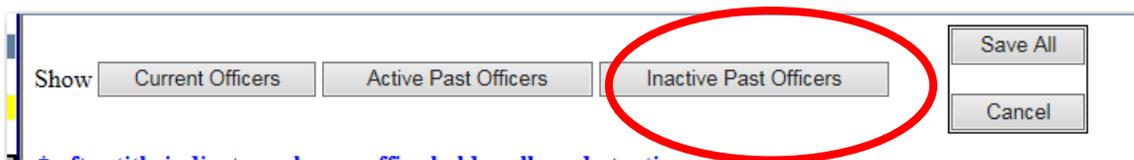
Office Titles listed in blue will cause the selected member to replace the current office holder

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



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

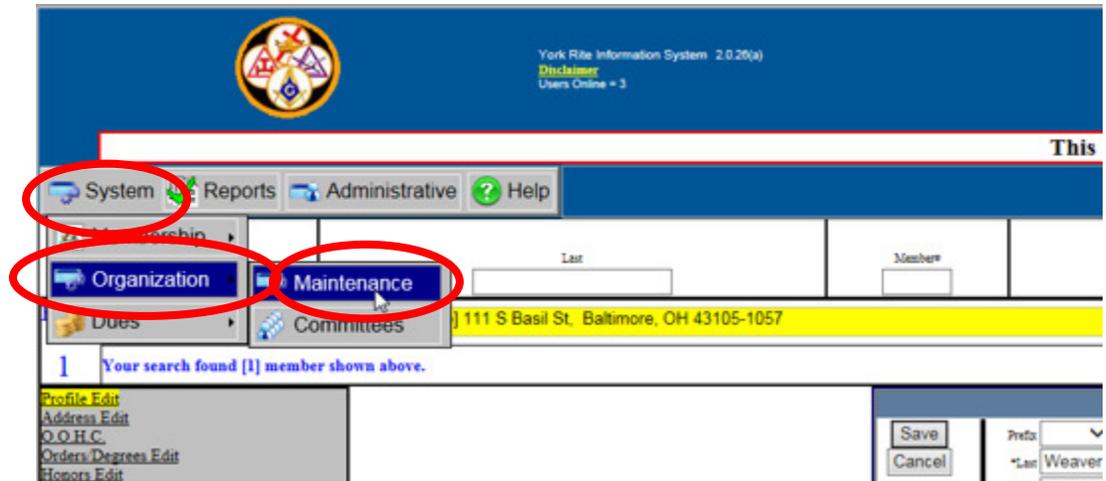


Under the ***Inactive Past Officers*** tab the user is able to see and edit their deceased Past Officers and/or those past Officers that are in an inactive status condition. In addition, you have the ability to add a whole new row to the list of officers shown. All options on this tab are the same as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

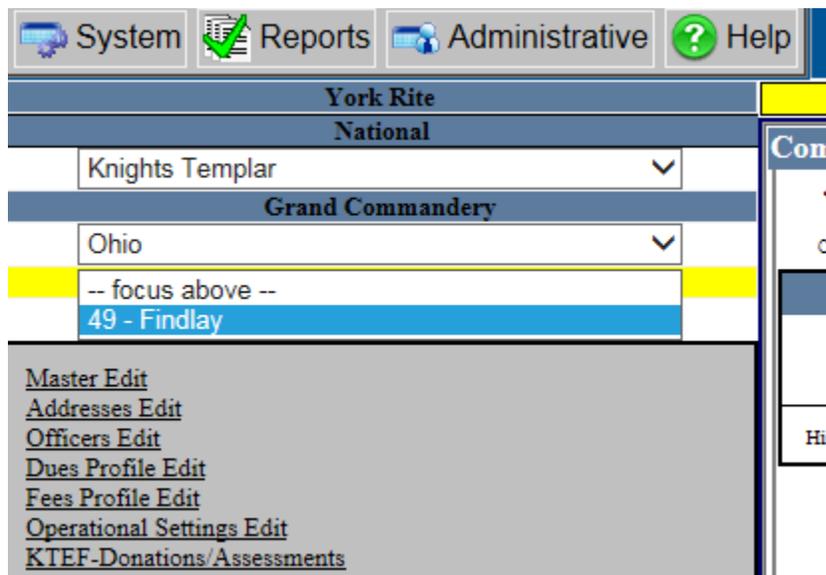
<div style="background-color: #e0e0e0; padding: 2px;">National</div> <div style="padding: 2px;">Knights Templar</div> <hr/> <div style="background-color: #ffff00; padding: 2px;">Grand Commandery</div> <div style="padding: 2px;">Ohio</div> <hr/> <div style="background-color: #e0e0e0; padding: 2px;">Commandery</div> <div style="padding: 2px;">-- focus above --</div> <hr/> <div style="background-color: #e0e0e0; padding: 2px;">Master Edit</div> <div style="background-color: #e0e0e0; padding: 2px;">Addresses Edit</div> <div style="background-color: #ffff00; padding: 2px;">Officers Edit</div> <div style="background-color: #e0e0e0; padding: 2px;">Dues Profile Edit</div> <div style="background-color: #e0e0e0; padding: 2px;">Fees Profile Edit</div> <div style="background-color: #e0e0e0; padding: 2px;">Operational Settings Edit</div> <div style="background-color: #e0e0e0; padding: 2px;">KTEF-Donations/Assessments</div> <hr/> <div style="background-color: #e0e0e0; padding: 2px;">Add Commandery</div>	<div style="text-align: right; border: 1px solid gray; padding: 2px; float: right;">Cancel</div> <p style="color: red; font-size: small;">Switching tabs will cause all work to be verified and saved.</p> <p>Sort By Office Rank Sort By MemberName A-Z Z-A Sort By Date Asc Desc</p> <p style="color: blue; font-weight: bold; font-size: small;">* after title indicates only one office holder allowed at a time</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: x-small;"> <thead> <tr> <th style="text-align: left;">Office Title</th> <th style="text-align: left;">Member Holding Office</th> <th style="text-align: left;">Start Date</th> <th style="text-align: center;">Delete</th> <th style="text-align: center;">View Member</th> </tr> </thead> <tbody> <tr> <td>Grand Recorder Emeritus</td> <td>Palm, Richard Henry</td> <td>11/11/1900</td> <td style="text-align: center;">Delete</td> <td style="text-align: center;">View Member</td> </tr> <tr> <td>Past Grand Commander</td> <td>Albertson, Charles R.</td> <td>9/30/2000</td> <td style="text-align: center;">Delete</td> <td style="text-align: center;">View Member</td> </tr> <tr> <td>Past Grand Commander</td> <td>Basil, Bruce D</td> <td>10/6/2007</td> <td style="text-align: center;">Delete</td> <td style="text-align: center;">View Member</td> </tr> <tr> <td>Past Grand Commander</td> <td>Estep, Edward A</td> <td>10/9/1999</td> <td style="text-align: center;">Delete</td> <td style="text-align: center;">View Member</td> </tr> <tr> <td>Past Grand Commander</td> <td>Grose Jr., Wilfrid A</td> <td>10/5/1991</td> <td style="text-align: center;">Delete</td> <td style="text-align: center;">View Member</td> </tr> <tr> <td>Past Grand Commander</td> <td>Long, Richard Dale</td> <td>10/7/1995</td> <td style="text-align: center;">Delete</td> <td style="text-align: center;">View Member</td> </tr> <tr> <td>Past Grand Commander</td> <td>Maust, Sylvester L.</td> <td>10/10/1998</td> <td style="text-align: center;">Delete</td> <td style="text-align: center;">View Member</td> </tr> <tr> <td>Past Grand Commander</td> <td>Meacham, Richard Allen</td> <td>10/9/1993</td> <td style="text-align: center;">Delete</td> <td style="text-align: center;">View Member</td> </tr> <tr> <td>Past Grand Commander</td> <td>Palm, Richard Henry</td> <td>10/8/1994</td> <td style="text-align: center;">Delete</td> <td style="text-align: center;">View Member</td> </tr> <tr> <td>Past Grand Commander</td> <td>Ritter Jr., Roy Christian</td> <td>10/9/2004</td> <td style="text-align: center;">Delete</td> <td style="text-align: center;">View Member</td> </tr> </tbody> </table> <div style="text-align: center; margin-top: 5px;"> <input type="button" value="Save All"/> <input type="button" value="Cancel"/> </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> <p style="text-align: center; color: blue; font-weight: bold; font-size: small;">Add a new member to a state-level office</p> <p style="text-align: center; font-size: x-small;">Select Officer's Local Body: - Local Body -</p> <p style="font-size: x-small;">Office Title: Select an office title Select Member: Start Date: Select Date</p> <p style="text-align: center; margin-top: 5px;"><input type="button" value="Add & Save New Officer"/></p> </div>	Office Title	Member Holding Office	Start Date	Delete	View Member	Grand Recorder Emeritus	Palm, Richard Henry	11/11/1900	Delete	View Member	Past Grand Commander	Albertson, Charles R.	9/30/2000	Delete	View Member	Past Grand Commander	Basil, Bruce D	10/6/2007	Delete	View Member	Past Grand Commander	Estep, Edward A	10/9/1999	Delete	View Member	Past Grand Commander	Grose Jr., Wilfrid A	10/5/1991	Delete	View Member	Past Grand Commander	Long, Richard Dale	10/7/1995	Delete	View Member	Past Grand Commander	Maust, Sylvester L.	10/10/1998	Delete	View Member	Past Grand Commander	Meacham, Richard Allen	10/9/1993	Delete	View Member	Past Grand Commander	Palm, Richard Henry	10/8/1994	Delete	View Member	Past Grand Commander	Ritter Jr., Roy Christian	10/9/2004	Delete	View Member
Office Title	Member Holding Office	Start Date	Delete	View Member																																																				
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Local Edit

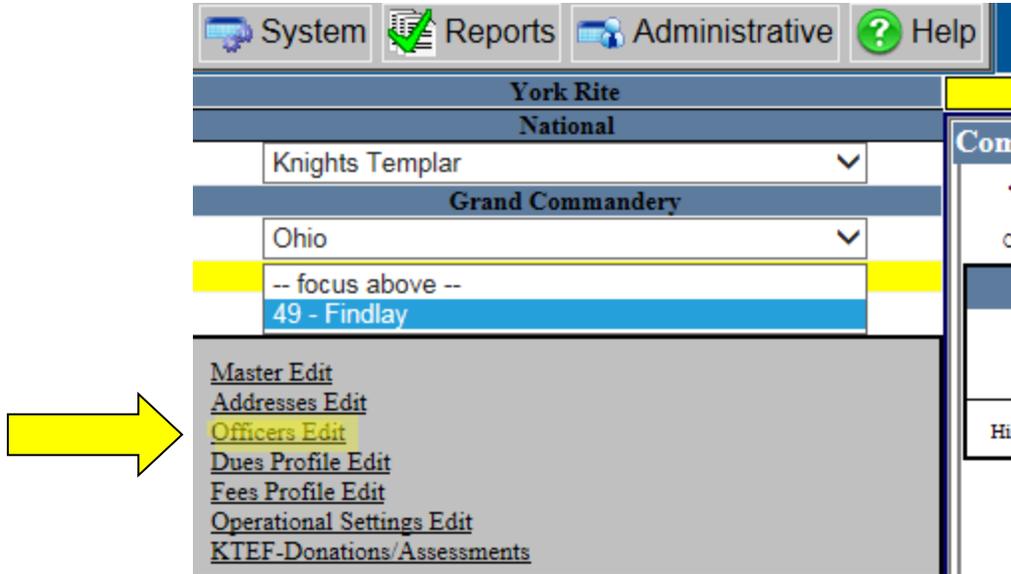
1. Officers Edit Local
 - a. Go to System / Organization / Maintenance



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



c. 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!**



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	Start Date		
Commander*	Osborne, Charles Cullen (Knighted)	1/5/2013	Delete	View Member
Generalissimo*	Korda, Stephen (Knighted)	1/5/2013	Delete	View Member
Captain 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.



Switching tabs will cause all work to be verified and saved.

* after title indicates only one office holder allowed at a time

Office Title: Commander*

Member Holding Office: Van Gundy, David Edgar (Knighted)

Start Date: 6/14/2011

Members in dropdown:

- Thimmes, Richard A. (Deceased)
- Thompson, John S (Knighted)
- Tobin, James C. (Deceased)
- Tolliver, William Lee (Knighted)
- Tucker, Theodore Charles (Deceased)
- Tussing, Richard Henry (Deceased)
- Unks, Theodore J. (Knighted)
- Van Gundy, Arthur Boice (Deceased)
- Van Gundy, David Edgar (Knighted)
- Van Gundy, Richard Benson (Knighted)

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 **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

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	Start Date	Delete	View Member
Commander*	Osborne, Charles Cullen (Knighted)	1/5/2013	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Generalissimo*	Korda, Stephen (Knighted)	1/5/2013	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Captain General*	Richard, Dale Harry (Affiliated)	1/5/2012	<input type="button" value="Delete"/>	<input type="button" value="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. Can not select a date greater than 12/5/2014

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

Show

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	Start Date	Delete	View Member
Commander*	Osborne, Charles Cullen (Knighted)	1/5/2013	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Generalissimo*	Korda, Stephen (Knighted)	1/5/2013	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Captain General*	Richard, Dale Harry (Affiliated)	1/5/2012	<input type="button" value="Delete"/>	<input type="button" value="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	Delete	View Member
Commander*	Osborne, Charles Cullen (Knighted)	1/5/2013	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Generalissimo*			<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Captain General*			<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Senior Warden*			<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Prelate*			<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Treasurer*			<input type="button" value="Delete"/>	<input type="button" value="View Member"/>

Message from webpage

Are you sure you want to delete Commander Osborne, Charles Cullen (Knighted)

Once you click OK you will see “Officer Deleted” in Green

Commandery Officers for: 8 - Tampa-Ivanhoe, Florida, Knights Templar, York Rite

Show **Officer Deleted**

Switching tabs will cause all work to be verified and saved.

* 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

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	Start Date		
Commander*	Osborne, Charles Cullen (Knighted)	1/5/2013	Delete	View Member
Generalissimo*	Korda, Stephen (Knighted)	1/5/2013	Delete	View Member
Captain General*	Richer, 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 **Officers Saved**

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	Start Date		
Commander*	Osborne, Charles Cullen (Knighted)	1/5/2013	Delete	View Member
Generalissimo*	Korda, Stephen (Knighted)	1/5/2013	Delete	View Member
Captain General*	Richer, Dale Harry (Affiliated)	1/5/2012	Delete	View Member

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

Show **Unable to save officers.**

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	Start Date		
Captain General*	Bieber, Dale Harry (Affiliated)	12/28/2014	Delete	View Member

*Future date not allowed. Can not select a date greater than 12/5/2014



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	View Member
Warder*	Haywood, Jerry (Knighted)	1/5/2012	Delete	View Member
Quartermaster	Martin, Frank V. (Affiliated)	1/5/2012	Delete	View Member

Save All Cancel

Add a new member to a local-level office

Select an office Select a member Select Date Add

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

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.

Add a new member to a local-level office

Select an office Select a member Add

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

- Adams, Charles Edward (Suspended)
- Adams, Harry J. (Knighted)
- 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)

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

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	Start Date	Delete	View Member
Commander*	Osborne, Charles Cullen (Knighted)	1/5/2013	Delete	View Member
Generalissimo*	Korda, Stephen (Knighted)	1/5/2013	Delete	View Member
Captain General*	Risher, Dale Harry (Affiliated)	1/5/2012	Delete	View Member

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

*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date	Delete	View Member
Commander*	Beck, John Elwin (Knighted)	12/3/2014	Delete	View Member

Select an office

Office Titles listed in blue will

Message from webpage

You will lose unsaved changes, are you sure?

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 O.O.H.C Orders/Degrees Edit Honors Edit Mailing Options Blue Lodge Other Organizations Memberships	<p>National: <input type="button" value="Knights Templar"/></p> <p>Orders/Degrees Earned</p> <table border="1"> <thead> <tr> <th>Date</th> <th>Order/Degree</th> <th>National</th> <th>State</th> <th>Local</th> </tr> </thead> <tbody> <tr> <td>1/1/1900</td> <td>Order of the Red Cross</td> <td>Knights Templar</td> <td>Florida</td> <td>8 - Tampa-Ivanhoe</td> </tr> <tr> <td>1/1/1900</td> <td>Order of Malta</td> <td>Knights Templar</td> <td>Florida</td> <td>8 - Tampa-Ivanhoe</td> </tr> <tr> <td>4/29/1978</td> <td>Order of the Temple (Knighted)</td> <td>Knights Templar</td> <td>Florida</td> <td>8 - Tampa-Ivanhoe</td> </tr> </tbody> </table> <p>Offices Held</p> <table border="1"> <thead> <tr> <th>Office</th> <th>Start</th> <th>National</th> <th>State</th> <th>Local</th> </tr> </thead> <tbody> <tr> <td>Judge Advocate General</td> <td>05/23/2012</td> <td>Knights Templar</td> <td>Florida</td> <td></td> </tr> <tr> <td>Recorder</td> <td>01/05/2013</td> <td>Knights Templar</td> <td>Florida</td> <td>8 - Tampa-Ivanhoe</td> </tr> </tbody> </table>	Date	Order/Degree	National	State	Local	1/1/1900	Order of the Red Cross	Knights Templar	Florida	8 - Tampa-Ivanhoe	1/1/1900	Order of Malta	Knights Templar	Florida	8 - Tampa-Ivanhoe	4/29/1978	Order of the Temple (Knighted)	Knights Templar	Florida	8 - Tampa-Ivanhoe	Office	Start	National	State	Local	Judge Advocate General	05/23/2012	Knights Templar	Florida		Recorder	01/05/2013	Knights Templar	Florida	8 - Tampa-Ivanhoe
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To get back to the Officer-Edit screen, simply click on any of the blue underlined Office Title under the “offices held” area.

Profile Edit Address Edit O.O.H.C. Orders/Degrees Edit Honors Edit Mailing Options Blue Lodge Other Organizations Memberships	National: Knights Templar ▼					
	Orders/Degrees Earned					
	Date	Order/Degree	National	State	Local	
	1/1/1900	Order of the Red Cross	Knights Templar	Florida	8 - Tampa-Ivanhoe	
	1/1/1900	Order of Malta	Knights Templar	Florida	8 - Tampa-Ivanhoe	
	4/29/1978	Order of the Temple (Knighted)	Knights Templar	Florida	8 - Tampa-Ivanhoe	
	Offices Held					
	Office	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

Master Edit Addresses Edit Officers Edit Dues Profile Edit Fees Profile Edit Operational Settings Edit KTEF- Donations/Assessments	National: Knights Templar ▼					
	Grand Commandery: Florida ▼					
	Commandery: 8 - Tampa-Ivanhoe ▼					
	Show: Current Officers Active Past Officers Inactive Past Officers Save All Cancel					
	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	Start Date			
	Captain General*	Bieber, Dale Harry (Affiliated)	1/5/2012	Delete	View Member	
	Senior Warden*	Sawyer, Sterling (Knighted)	1/5/2012	Delete	View Member	
	Prelate*	Scott, Kenneth P. (Knighted)	1/5/2012	Delete	View Member	
Treasurer*	Myers, Eric L. (Knighted)	1/5/2013	Delete	View Member		

Now lets review the Active Past Officers tab

Show	Current Officers	Active Past Officers	Inactive Past Officers	Save All	Cancel
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Under the **Active Past Officers** tab the user is able to see and edit your living Past Officers.

Commandery Officers for: 49 - Findlay, Ohio, Knights Templar, York Rite

Show

Switching tabs will cause all work to be verified and saved.

[Sort By Office Rank](#) Sort By MemberName [A-Z](#) [Z-A](#) Sort By Date [Asc](#) [Desc](#)

*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date	Delete	View Member
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

Switching tabs will cause all work to be verified and saved.

[Sort By Office Rank](#) Sort By MemberName [A-Z](#) [Z-A](#) Sort By Date [Asc](#) [Desc](#)

*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date	Delete	View Member
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

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	Start Date	Delete	View Member
Commander*	Osborne, Charles Cullen (Knighted)	1/5/2013	Delete	View Member
Generalissimo*	Korda, Stephen (Knighted)	1/5/2013	Delete	View Member
Captain General*	Richer, 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

Switching tabs will cause all work to be verified and saved.

Sort By [Office Rank](#) Sort By MemberName [A-Z](#) [Z-A](#) Sort By Date [Asc](#) [Desc](#)

Add a new member to a local-level office

Select an office Select a member Select Date

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

Add a new member to a local-level office

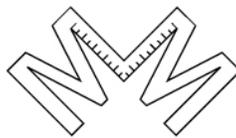
Select an office Select a member Select Date

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

***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

Show



Solutions.

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

Switching tabs will cause all work to be verified and saved.

Sort By [Office Rank](#) Sort By MemberName [A-Z](#) [Z-A](#) Sort By Date [Asc](#) [Desc](#)

*** after title indicates only one 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	▼	Delete 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

[Add a new member to a local-level 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