

# Regional Summary Page

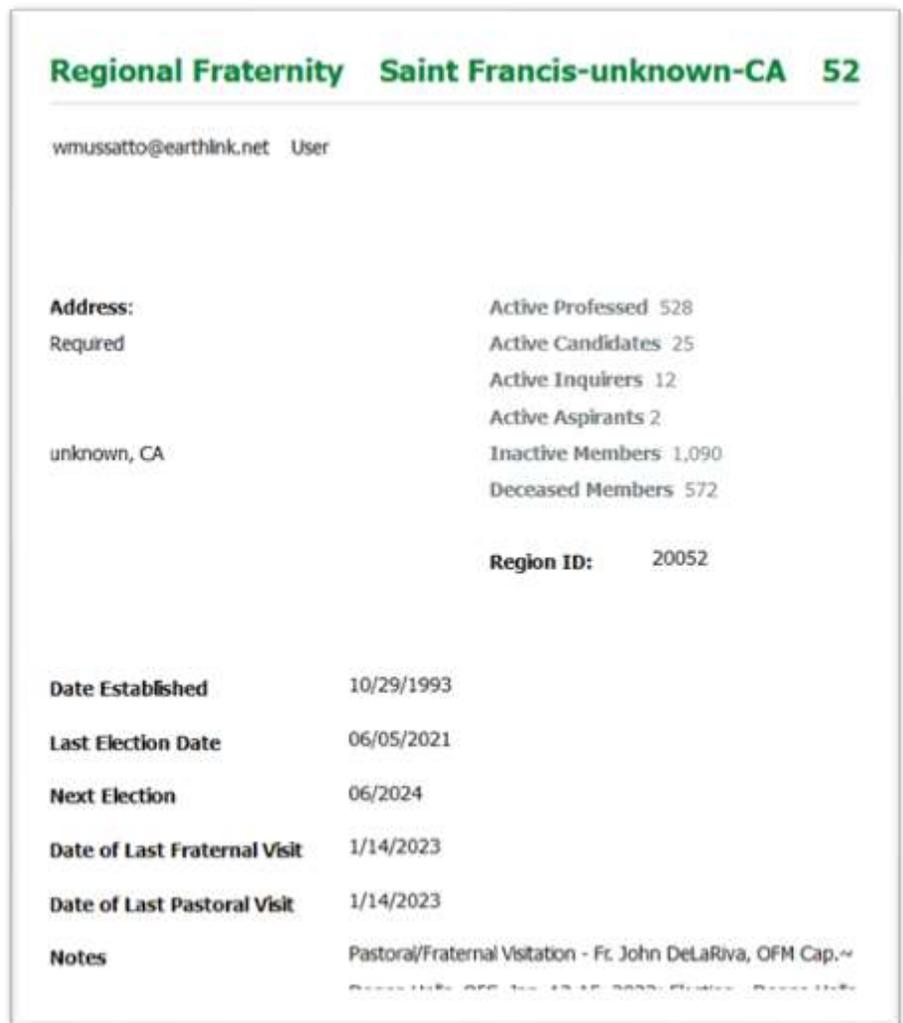
1. Like all summary pages the left side of the page shows common functions: **Select a Different Organization, Log Out, Password Reset, Global Search, View/Edit TAU Distribution, Transfer Person to Another Organization, Reports, User Documentation.** These functions are all covered in separate Help Documentation. On the upper right is the **Contact Us** link. Use this to put in a help request, report problems or request enhancements.

2. The Right side of the organization summary page is divided into sections which will be covered separately below: Top name and summary, history/key dates, and notes, common tasks, roster, positions, Subsidiary Groups, Membership.

3. Above certain tables you will find  [Download Data](#) Clicking on it will cause a spreadsheet (e.g., Excel) compatible file, and in some cases, a PDF, to be downloaded.

4. **Top name and summary:**

- a. The top line is what kind of organization, followed by the name, city and state.
- b. Below that is your username as well as your status (Admin/User)
- c. The number at the end is the formal official number of the organization. Note: at the bottom of this section is the internal unique number assigned by the system. Use this number when reporting any issues.
- d. On the left is the address the system has for the organization.
- e. On the right is the summary of membership in this organization by status.



<b>Regional Fraternity Saint Francis-unknown-CA 52</b>	
wmussatto@earthlink.net User	
<b>Address:</b> Required	Active Professed 528 Active Candidates 25 Active Inquirers 12 Active Aspirants 2 Inactive Members 1,090 Deceased Members 572
unknown, CA	<b>Region ID:</b> 20052
<b>Date Established</b>	10/29/1993
<b>Last Election Date</b>	06/05/2021
<b>Next Election</b>	06/2024
<b>Date of Last Fraternal Visit</b>	1/14/2023
<b>Date of Last Pastoral Visit</b>	1/14/2023
<b>Notes</b>	Pastoral/Fraternal Visitaton - Fr. John DeLaRiva, OFM Cap.~

5. **History/Key Dates:** the items in this section are self-explanatory.

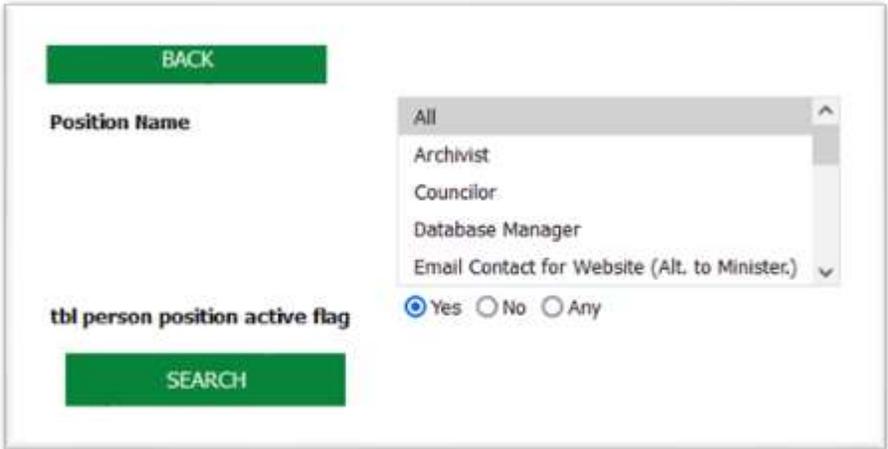
The **Notes** section provides added information which has been added about the organization.

6. Next are some of the common tasks. Some are available only to certain users.

- a. Click on **Edit/View Region** to open the page that allows all users to view or edit basic information about this Region. If the user has Read Privilege, the information is displayed but not editable. Users with Edit permissions can change any information.
- b. If the user has edit permissions for this organization the **Create New Fraternity** link will be displayed. Clicking on this link will open a window to Create a new fraternity associated with this region..
- c. The link **Transfer Fraternity to New Region** requires the user have Admin role with edit permissions to both the Region where the Fraternity is and the Region where the Fraternity is going to. *Warning:* this is a change from the old system. Typically, this function will need to be performed by a national admin.



- d. Users can click on **Directory of Fraternity Councils** will open a form which will allow the user to view members of all councils, including the regional council, within a region. At the top is a area where the user an filter which offices they wish to have included in the list (e.g., Formation



Directors, or Ministers and Vice Ministers). To select more than one office hold down the 'Ctrl' key and click on the office. Then click on the **SEARCH** button to filter the list. Remember you can click on the [Download Data](#) and select either CSV for spreadsheet or **PDF** for a watermarked printable version. *Note:* it will take some time for the system to prepare the **PDF** version, particularly for a full roster. When the you are done, click on the **BACK** button to return to the Region Summary Page.

- e. **Warning** When an election has just occurred the steps in 'f' below need to be performed by the **Admin** user. Changes to the positions by other users with permissions should not be made during this process. It is up to the Admin user to coordinate with any other users (normally Fraternity level Editors. This can be handled by adding a temporary note using the **Edit/View Fraternity** function and entering a new 1<sup>st</sup> line ""\*\*ELECTION RESULTS BEING ENTERED \*\* ". The Admin user should remove it after the snapshot has been taken. See 'f'

below for how to do this.

- f. When an **election** occurs the Regional Amin User needs to record the election. The 1<sup>st</sup> step is to note that the election happened by clicking on the **Register Election** link.

- i. Fill out the form that opens. Normally this is the Current election (see another help file on how to record past elections). The next election date will be calculated to be three years from the date of this election. Include any notes. In this case the election occurred 2 years after the prior election in

order to get the fraternity back on the normal schedule. .

Click on **SUBMIT** to record the result.

**register election**

**RETURN TO ORG SUMMARY**

**Organization** Saint Padre Pio-Moreno Valley-CA

**Org\_Unit** 10134

**place of election** olic Church Moreno Valley, CA

**election date \*** 06/11/2023

**next election year** 06/2026

**presider name** Caroline Yandrell

**ecclesial witness** William Mussatto

**current election**

**notes** Election after 2 years to return to the normal cycle.

**SUBMIT**

**RETURN TO ORG SUMMARY** Click on



Will be displayed to confirm the success.

- ii. The Regional Admin User needs to **Immediately** go to the positions and click on the **Details** link on each position. If there is a new person in the position, select them from the **Select New Name** drop down menu. Only Active Professed should appear in this list. If the same person was reelected to the same position confirm that the **Elected/Appointed** is set to *Elected* and then Click on the **UPDATE** button. If the position becomes vacant (say 2<sup>nd</sup> councilor) use the **Vacant Position Flag** drop down to signal this and then click on the **UPDATE** button. In both cases you will be returned to the Fraternity Summary Page.
- iii. Scroll down to the positions list and you will see that the Last Election and Next Election dates for that position have been updated. Repeat for all the *elected* positions. If a position is vacant it will remain in the list but Vacant will show up in the position list. If the position is no longer needed (for instance, an appointed committee chair) **The Position Active for this Org** flag should be clicked off. If the position is a required position, the editor will not be able to change this field.
- iv. If you need to add a new position that is optional, below the positions table there is a **Create New Position** link. Click on it and the Create New Fraternity Position page will open. This form is like the form above. Note if you select Elected the current election date and estimated next election date will be populated. Since this is a new position, you can't mark it as vacant. Again, only the active professed are available for assignment. Click on **SUBMIT** when you have completed the form. The new position will appear in the positions table.

Position Title	Position Description	Person Name	Last Election	Estimated Next Election	Elected/ Appointed	Date Appointed	Edit/View
Minister		Caroline Yandell	6/5/2021	6/2024	Elected		<a href="#">Edit/View</a>

**RETURN TO ORG SUMMARY**

**org unit id**

**election id**

**SUBMIT**

- v. When you have updated/added all the positions, scroll down to the **Create Council Snapshot** link to record the election. And then Click **SUBMIT** to record the Snapshot. *Remember* to then clear the Note by going to View/Edit Region.
- vi. If you scroll down on the summary page and click on the **View Council History** link you will see a record of this election at the top as well as any prior elections the system has recorded.
- g. If you need to change information about an election, click on **Edit Election Details**. This function requires an admin. This will open a list of all of the elections the system knows about. One of the elections should always be marked current. To edit details about the election click on the **View Details** link. You can change Events about an election. You can also change which election is current, when the election was held, and by whom. **Note:** changing the date of the current election will not automatically change the next election dates or when a person was elected. You will need to update each of the positions for this to happen. If you do this, retake the snapshot. You can also delete an election by clicking on the X **Delete link**, but under normal situations *don't do that*. Click on when you are done with editing elections.
- h. The Positions table shows the list of required positions and *all* the required positions. By default, it shows active positions are displayed. Inactive positions can be viewed by changing the filter in the search. Clicking on the **Download Data** link will download a CSV version of the table which you can import into a spreadsheet program.

shows the Position Title, the optional Position Description, the name of the holder of the position, the Last Election date, Estimated Next Election date, whether the position is filled by election or appoints (remember if members of a council change position by council vote, the new assignment is *appointed* even if the original person was elected to it), if appointed, the date appointed, and finally the Details link where you can view or change who holds the position.

**RETURN TO ORG SUMMARY** Each row display

**org unit positions**

Position Active  Yes  No  All

**SEARCH**

Download Data

- i. If you click on the **Edit/View** link information about the position will be displayed. If you have read access you can



tell who holds the position but not any information about how to contact them. Use the **Directory of Fraternity Councils** described above to obtain this information.

- ii. If you have edit permissions you can change who holds the office. Remember if the office holder is changed outside of an election, it is an appointed position, even if it was initially filled by election.

7. Next is a list of the *Active* Fraternities.

**Active Fraternities**

[Download Data](#)

Fraternity Name ▲	Number	Org_Unit_ID	Status	Active	Fraternity Link
Blessed Luchesus & Bounadonna (K)-Los Angeles-CA	13801	11351	Established	Yes	
Holy Spirit-Claremont-CA	11701	10149	Established	Yes	<a href="#">Summary</a>
Immaculata-Corona-CA	12201	10154	Established	Yes	

If you have Read or Edit permissions you will see a **Summary** link in that row. Clicking on this link will take you to the Fraternity Summary page.

8. Below is a link to inactive fraternities. Click on View/Edit Inactive Fraternities

**Inactive Fraternities**

[BACK](#)

[Download Data](#)

Fraternity Name ▲	Number	Org_Unit_ID	Status	Active	Fraternity Link
Immaculate Concep. - Inactive-Colton-CA	11601	10148	Deactivated	No	<a href="#">Summary</a>
Little Portion - Inactive-Irvine-CA	13301	10165	Established	No	
Old Mis Santa Ynez- Inactive-Santa Ynez-CA	12601	10158	Established	No	

Again if you have access to the Fraternities click on the **Summary** link to view that fraternity and any member of it , living, dead or inactive.

9. Next is a member search. Because of the number of persons within a region, it does not display the results by default.

At the top is search box. In addition to the normal kinds of members and status you can enter a partial names Use '%' for wildcards. The results will list the names and fraternity. You must have access to the fraternity in order to get information about the members displayed. Go to the Fraternity listed above and click on the fraternity's **Summary** link for details about the person.

10. If this fraternity has Subsidiary Group they will be displayed below the **View Council History**, or **Create Snapshot** (Admin only) depending on the user's permissions. See the document on Subsidiary Groups for more information about creating, moving and populating subsidiary groups.

11. The last section shows information about Newly Forming Groups, Emerging Fraternities and Cells

**Newly Forming Groups, Emerging Fraternities and Cells**

Active  Yes  No  Any

Subsidiary Name	Subsidiary Number	Subsidiary Type	Sponsor Name	Sponsor #	Active
My God My All EC-Fullerton-CA	10002	Emerging Fraternity	Region Sponsored Groups	30001	Yes
New Group - Azusa NFG (S)-Azusa-CA	10702	Newly Forming Group	Santo Torbio (S) Deactivated-Los Angeles-CA	10701	No
Remote-Claremont-CA	2502	Newly Forming Group	Holy Spirit-Claremont-CA	11701	No
Saint Benedict EC Inactive-Whittier-CA	10602	Emerging Fraternity	Saint Joseph-Los Angeles-CA	10601	No

Records 1-4 of 4

By default it will show Active groups, but you can select inactive groups. Again to see detail you need to view the Fraternity under which they are affiliated.