



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  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.
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.

Regional Fraternity

Saint Francis-unknown-CA

52

wmussatto@earthlink.net

User

Address:
Required

unknown, CA

Active Professed 528
Active Candidates 25
Active Inquirers 12
Active Aspirants 2
Inactive Members 1,090
Deceased Members 572

Region ID: 20052

Date Established

10/29/1993

Last Election Date

06/05/2021

Next Election

06/2024

Date of Last Fraternal Visit

1/14/2023

Date of Last Pastoral Visit

1/14/2023

Notes

Pastoral/Fraternal Visitation - Fr. John DeLaRiva, OFM Cap.~
Saint Francis-unknown-CA 10/29/1993: Election - Saint Francis-unknown-CA

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 to 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 an area where the user can 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 you are done, click on the **BACK** button to return to the Region Summary Page.

- e. Users can click on **Regional Address List** to open a form which allow an extract of information about all the members of a region to which they have access. The form at the right will open and allow you to filter by status and District/Group if the region has indicated these on their fraternities. The resulting display provides Last Name, Display Name Suffix (e.g., OFS), Active Status, Fraternity Name, District/Group, Profession Status, Profession Date, Membership Status, Birth Date, Date of Death, Phone 1, Cell Phone, Email Address, and primary Mailing Address .

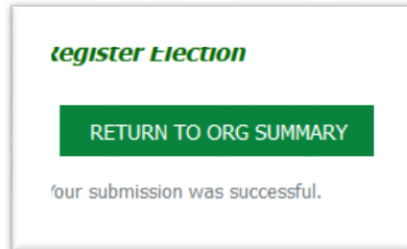
Click on  [Download Data](#) to download as a PDF or CSV.

Because this can be downloaded as a CSV file and imported into a spreadsheet program (e.g., Excell), you can remove un-needed columns. This allows you to create an email list. If a user with only Fraternity access uses this form they will see only persons associated with that Fraternity.

- f. **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 1st 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.

- g. When an **election** occurs, the Regional Amin User needs to record the election. The 1st 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 **RETURN TO ORG SUMMARY** to abandon the entry.
- Click on **SUBMIT** to record the result.



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 2nd 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.

- 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.

- h. 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 [RETURN TO ORG SUMMARY](#) when you are done with editing elections.

Election Edit

[RETURN TO ORG SUMMARY](#)

(Note - You need to have one "Current" election when you finish making your changes.)

| Fraternity Name | Org Unit ID | Election ID | Election Date ▼ | Next Election Due Mo/Year | Current | Last Edit Date | |
|--------------------------|-------------|-------------|-----------------|---------------------------|---------|-----------------------|---|
| Saint Francis-unknown-CA | 20052 | 741 | 6/5/2021 | 06/2024 | Yes | 7/18/2023 12:27:12 PM | View Details X Delete |

Records 1-1 of 1

- i. 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.

Org Unit Positions

Position Active ☐ Yes ☐ No ☒ All

[SEARCH](#)

[Download Data](#)

Each row shows the Position Title, the optional Position Description, the display 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.

| 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 | | Edit/View |

- 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.
- 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 Luchesi & Bounadonna (K)-Los Angeles-CA | 13801 | 11351 | Established | Yes | |
| Holy Spirit-Claremont-CA | 11701 | 10149 | Established | Yes | Summary |
| 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.

Inactive Fraternities

[BACK](#)

 [Download Data](#)

| Fraternity Name ▲ | Number | Org_Unit_ID | Status | Active | Fraternity Link |
|--|--------|-------------|-------------|--------|-------------------------|
| Immaculate Concep. - Inactive-Colton-CA | 11601 | 10148 | Deactivated | No | Summary |
| Little Portion - Inactive-Irvine-CA | 13301 | 10165 | Established | No | |
| Old Mis Santa Ynez- Inactive-Santa Ynez-CA | 12601 | 10158 | Established | No | |

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

Prof Status

All

Visitor
Aspirant
Inquirer
Candidate

Mbrship Status

All

01-Active
02-Lapsed
03-Deceased
04-Active-Excused

Last Name

First Name

Middle Name

Active
☒ Yes ☐ No ☐ Any

[SEARCH](#)

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

SEARCH

| 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 Toribio (S) Deactivated-Los Angeles-CA | 10701 | No |
| Remote-Clermont-CA | 2502 | Newly Forming Group | Holy Spirit-Clermont-CA | 11701 | No |
| Saint Benedict EC Inactive-Whittier-CA | 10602 | Emerging Fraternity | Saint Joseph-Los Angeles-CA | 10601 | No |

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