

Masonic Online Registry Interface

Secretary's Manual

© 2005-2006 Vita Rara, Inc.

Last Update: 6/8/2006

Forward

This book is a compilation of entries in the MORI Help System that pertain to Lodge Secretarial functions. As such, there are skips in the numbering of sections where Grand Lodge Secretarial and Fundraising functions have been omitted.

As features are added to MORI, the documentation will first appear in the Help System before it appears in this manual. If you cannot find the answer you desire in this manual, please consult the Help System (found under Help in the MORI Menu.) If the help system fails to address your question, please contact Lodge Services at Grand Lodge for assistance.

Table Of Contents

- 1 Membership
 - 1.1 Find Member
 - 1.1.1 Edit Member
 - 1.1.1.1 Edit Affiliations
 - 1.1.1.2 Edit Events
 - 1.1.1.3 Add Office
 - 1.1.1.4 Edit Office
 - 1.2 Add Member
 - 1.3 Add Affiliation
 - 1.4 Add Foreign Affiliation
 - 1.5 Lodge Roster
 - 1.6 Pending Foreign Affiliations
- 2 Lodge
 - 2.1 Member Types
 - 2.2 Dues Notices
 - 2.2.1 Print Dues Notices
 - 2.3 Arrears Notices
 - 2.3.1 Print Arrears Notices
 - 2.4 Lodge Summons
 - 2.5 Annual Report
 - 2.6 Subordinate Roles
 - 2.7 Certificates of Election
 - 2.7.1 Certificate of Election
- 5 Financial
 - 5.1 Setup Dues
 - 5.2 Edit Arrears / Dues
 - 5.3 Initialize Dues
 - 5.4 List Paid / Unpaid
 - 5.5 Member Payments
 - 5.6 Non-Member Payments
 - 5.7 Budget
 - 5.8 Vouchers
 - 5.8.1 Edit Voucher
 - 5.9 Cash Book
 - 5.10 Cash To Treasurer
 - 5.11 Calculate Checkbook
- 6 Mail Room
 - 6.6 Reports / Labels
 - 6.7 Mailing Lists
- 9 Help
 - 9.1 With This Page (takes the user to the help for the page their viewing)
 - 9.2 Contents (this page)
 - 9.3 About
 - 9.4 Documents
- 10 Language
- 11 Account
 - 11.1 Login
 - 11.2 Logout
 - 11.3 Update Account
 - 11.5 Create Account
 - 11.7 Insert Key
- A Auxiliary Functions
 - A.1 Notes
 - A.1.1 Edit Note
 - A.1.2 Note History

1 Membership

Navigation

The membership section of MORI can be reached under the "Membership" heading of the menu.

Access

Nearly anyone logged into MORI has some level of access to this section of MORI.

Instructions

The actual Membership screen is just an index of Membership functions

Notes

- Functions on the Membership screen are only listed if they are accessible to the user.

1.1 Find Member

Navigation

The Find Member screen can be reached by going to "Membership > Find Member" in the menu.

Access

This feature is open to anyone logged into MORI (with some restrictions)

Instructions

To find a member, you can look for them by any of the following cumulative options:

- Name (Last, First)
- Lodge
- Grand Lodge Number
- Status
- Excluded statuses

The system will return the first 25 matches and will provide for paging through the remaining matches.

Summary Function

The Summary link next to each match updates the summary data at the bottom of the window.

Edit Function

The Edit function brings you to the member's screen in a mode to edit the member. (Limited to users with Read/Write access to the record)

View Function

The View function brings you to the member's screen in a mode to view the member.

Label Function

The Label function will generate a single label for addressing a communication to the member. (Limited to Grand Lodge users)

Profile Function

The Profile function will generate a report of the member's Masonic history.

Notes

- Users from a specific lodge will have all searches limited to that lodge
- Deceased, Expelled and Suspended members are excluded by default. They will be included if you either uncheck the exclusion or deliberately select the status.
- Any part of the name will be looked for at the beginning of that part in the database (e.g., ME will match "Menard" and not match "Ames")
- Lodge and Grand Lodge numbers can be entered partially. (e.g.,Lodge #0001 can be entered as "1" or "0001") (e.g., Grand Lodge number A2345 can be entered as "A2345" or "A 2345")

1.1.1 Edit / View Member

Navigation

The Edit (or View) Member screen can be accessed either by clicking "edit" (or "view") on the Find Member screen, or by following a link to the member from a variety of pages.

Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadOnly, grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

Instructions

To edit a member, make your desired changes and click save. The full spectrum of the data is stored across several tabs (accessed by clicking on the name of the tab)

Field Descriptions:

- member data tab:
 - GL# - The member's Grand Lodge Number
 - Primary Lodge - The member's primary lodge
 - GL Status - The member's status within the Jurisdiction:
 - Inactive - A legacy record found in an invalid state during importation
 - Deceased - The member is deceased
 - Non-Affiliated - The member is not affiliated with any lodges in this Jurisdiction
 - Suspended - The member has been suspended
 - Expelled - The member has been expelled
 - Unaffiliated - The member has been unaffiliated for non-payment of dues
 - Honorary - The member's only affiliations within this Jurisdiction are Honorary
 - Widow - This is a widow
 - Entered Apprentice - This is an entered apprentice
 - Fellowcraft - This is a fellowcraft
 - Good Standing - This is a member is Good Standing
 - Subscriber - This is a subscriber record for the magazine
 - Donor - This is a donor to the fundraising. Only used if they have no other relationship to the Jurisdiction
 - Guest - This is a guest record for one of the lodges
 - <blank> - unknown
 - ESM Indicator - single letter indicator of a member's status:
 - D - deceased
 - E - expelled

- H - honorary
- I - inactive
- M - non-affiliated
- N - unaffiliated
- S - suspended
- <blank> - good standing
- Lodge Status - the member's status within the viewing lodge:
 - Lodge Suspended - The lodge has had its charter suspended
 - Lodge Forfeited - The lodge forfeited its charter
 - Lodge Merged - The lodge has merged with another lodge
 - Lodge Surrendered - The lodge has surrendered its charter
 - Lodge Under Dispensation - The lodge is under dispensation
 - Master Mason - The member is a
 - master mason
 - Fellowcraft - The person is a fellowcraft
 - Entered Apprentice - The person is an entered apprentice
 - Honorary - The member is honorary in this lodge
 - Widow - The person is a widow
 - Inactive - The person is inactive, as described above
 - Dimitted - The member has dimitted from this lodge
 - NPD - The member has been flagged for Non-Payment of Dues
 - Cleared - The member has been cleared of their NPD status
 - Dropped - The member was dropped from the roles due to Unaffiliation or Expulsion
 - Pending Restoration - The member has been restored in this lodge, but is pending restoration in another
 - Withdrawn - The person withdrew from this lodge
 - Donor - The person is a donor who's donations are associated with this lodge
 - Subscriber - The person is a subscriber to the magazine in association with this lodge
 - Guest - The person is a guest of this lodge
 - Invalid - The person/member is in an invalid state
 - Unknown - The person/member is in an unknown state
 - <blank> - Similar to unknown, above
- Options - lists of functions open to users, listed below
- Birth Date - Date of birth in MM/DD/YYYY order.
- Birthplace - City, State or City/Province of birth
- Birth Country - Country of birth
- Occupation - Their current occupation
- Age - The member's age, as of today, provided Birth Date is correct
- YGS - The member's years of good service. If 999, the member's history is somehow invalid
- Title - The member's masonic title
- DSA - A field to indicate the member has received a Distinguished Service Award
- Last Name - Usually the member's last name, but could be an organization for subscribers/donors
- First Name
- Middle Name
- Spouse - The spouse's name; first or full as needed
- Proposed By (GL#) - The member who proposed this member. Can be entered by entering the Grand Lodge number or by using the "find" function
- Mentor (GL#) - The member who is mentoring/has mentored this member. Can be entered by entering the Grand Lodge number or by using the "find" function
- Initiation Date - the date the member was initiated entered apprentice. Set while adding the member.

- Passing Date - the date the member was passed into fellowcraft. Entered through the Add Event function on the events tab
- Raising Date - the date the member was raised to master mason. Entered through the Add Event function on the events tab
- Current Degree - the member's current degree within the fraternity
- Member Type - The member's member type within the lodge (e.g., regular, life, hardship, etc)
- Notes - See the notes function below
- contact info tab:
 - Home Address - the member's address for most/all of the year
 - Address 1 - first line of the address of c/o for an organization
 - Address 2 - second line of the address
 - City - the city (required if foreign country is blank)
 - State/Province - the state or province (required if foreign country is blank)
 - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
 - Foreign Country - the country (blank for US)
 - Change Source - Whenever the address changes, a source must be cited
 - lodge - change came from the lodge
 - member - change came from the member or their family
 - post office - change came from the post office - returned mail or Address Change Service
 - Last Change - date of the last change and the source (L, M, P)
 - Phone - phone number at this address
 - Fax - fax number at this address
 - Bad Address - checkbox to indicate whether this is a bad address. If the designation came from the Address Change Service, a reason will also be displayed here
 - Snowbird Address - another address at which member summers/winters
 - Address 1 - first line of the address of c/o for an organization
 - Address 2 - second line of the address
 - City - the city (required if foreign country is blank)
 - State/Province - the state or province (required if foreign country is blank)
 - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
 - Foreign Country - the country (blank for US)
 - Change Source - Whenever the address changes, a source must be cited
 - lodge - change came from the lodge
 - member - change came from the member or their family
 - post office - change came from the post office - returned mail or Address Change Service
 - Last Change - date of the last change and the source (L, M, P)
 - Phone - phone number at this address
 - Fax - fax number at this address
 - Bad Address - checkbox to indicate whether this is a bad address. If the designation came from the Address Change Service, a reason will also be displayed here
 - Work Address - the address where the member works. (Note: the system will not produce labels for this address)
 - Company - the company where the member works
 - Address 1 - first line of the address of c/o for an organization
 - Address 2 - second line of the address
 - City - the city (required if foreign country is blank)
 - State/Province - the state or province (required if foreign country is blank)

- Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
 - Foreign Country - the country (blank for US)
 - Phone - phone number at this address
 - Fax - fax number at this address
 - Bad Address - checkbox to indicate whether this is a bad address.
 - Snowbird Effective
 - From - month/day to begin using the snowbird address as their primary address
 - To - month/day to stop using the snowbird address as their primary address
 - Send ESM (as allowed) - If all other conditions are met, send the magazine
 - Email Address - the person's email address
 - Cell Phone - the person's cell phone number
 - Privacy - if checked, limits display of the contact information in some isolate circumstances (e.g., on the Grand Lodge Roster)
- lodge affiliation tab:
 - Lodge - the number and name of a lodge to which the member is affiliated
 - Type - the type of affiliation this is:
 - Merged - the member was affiliated with a lodge that has since merged
 - Primary - the member's first affiliation or a descendant of their first affiliation
 - Secondary - other lodges to which the member has affiliated
 - Date - the date the member joined/affiliated with the lodge
 - Description - a description of the affiliation
 - Rec'd - the date the affiliation was recorded
 - AR Year - The Annual Return under which the affiliation was (or should have been) recorded
 - Status - the member's status within the lodge:
 - Lodge Suspended - The lodge has had its charter suspended
 - Lodge Forfeited - The lodge forfeited its charter
 - Lodge Merged - The lodge has merged with another lodge
 - Lodge Surrendered - The lodge has surrendered its charter
 - Lodge Under Dispensation - The lodge is under dispensation
 - Master Mason - The member is a master mason
 - Fellowcraft - The person is a fellowcraft
 - Entered Apprentice - The person is an entered apprentice
 - Honorary - The member is honorary in this lodge
 - Widow - The person is a widow
 - Inactive - The person is inactive, as described above
 - Dimitted - The member has dimitted from this lodge
 - NPD - The member has been flagged for Non-Payment of Dues
 - Cleared - The member has been cleared of their NPD status
 - Dropped - The member was dropped from the roles due to Unaffiliation or Expulsion
 - Pending Restoration - The member has been restored in this lodge, but is pending restoration in another
 - Withdrawn - The person withdrew from this lodge
 - Donor - The person is a donor who's donations are associated with this lodge
 - Subscriber - The person is a subscriber to the magazine in association with this lodge
 - Guest - The person is a guest of this lodge
 - Invalid - The person/member is in an invalid state
 - Unknown - The person/member is in an unknown state
 - <blank> - Similar to unknown, above
- events tab:
 - Add Event - a list of events that can be done with this member:
 - Died - indicate that the member has died

- Suspended - indicate that the member has been suspended
- Expelled - indicate that the member has been expelled
- Dimitted [- LODGE] - indicate that the member dimitted from the lodge
- Withdrawn [- LODGE] - indicate that the member withdrew from the lodge
- Cleared [- LODGE] - indicate that the member has been cleared by the lodge
- Unaffiliated/NPD [- LODGE] - indicate that the member has been unaffiliated/npd'd by the lodge
- Restored - indicate that the member was restored from deceased, suspended, expelled (Note: restoring a deceased person will remove the deceased event(s).)
- Restored [- LODGE] - indicate that the member was restored to good standing in the lodge
- Passed [- LODGE] - indicate that the member was passed into fellowcraft by the lodge
- Raised [- LODGE] - indicate that the member was raised to master mason by the lodge
- Date - the date the event took place (in MM/DD/YYYY format)
- Type - the type of event listed:
 - Affiliation - an affiliation inserted into the table as an event to show a complete timeline
 - Lodge - an event initiated by the lodge
 - Member - an event initiated by the member
 - Grand Lodge - an event initiated by Grand Lodge
- Date - the date the event took place
- Rec'd - the date the event was recorded
- AR Year - The Annual Return under which the event was (or should have been) recorded
- Description - a description of the event
- offices held tab:
 - Office - the office the person held and where
 - Jurisdiction - the Jurisdiction in which they held the office
 - From - the year they took office
 - To - the year they left office
 - Options - functions that can be performed on an office:
 - edit - edit the office (See the function below)
- lodge info tab:
 - Mailing Lists - the office the person held and where

Unlock Function

This function is available to Grand Lodge users to make it possible to alter an Inactive record.

Label Function

This function is available to Grand Lodge users and produces a single label for an attached printer

Profile Function

This function produces a ready-to-print PDF of a member's profile.

Edit Affiliations Function

This function is detailed on the edit affiliations page.

Edit Events Function

This function is detailed on the edit events page.

Add Event Function

To add an event to a member, select the event from the list on the events tab and enter the date of the event. Clicking Add or Save at that point will commit the event to the database and adjust the member appropriately.

Find Function

Clicking a "find" link next to a GL Number field will launch a "Finder" window that works exactly like the find member screen. Clicking "select" on the finder screen will populate the related field with the desired GL Number.

Notes Function

This function is detailed on the notes page.

Add Office Function

This function is detailed on the add office page.

Edit Office Function

This function is detailed on the edit office page.

Notes

- Grand Lodge numbers can be entered partially. (e.g., Grand Lodge number A2345 can be entered as "A2345" or "A 2345")

1.1.1.1 Edit Affiliations

Navigation

The Edit Affiliations screen can be accessed from the "lodge affiliation" tab of the Edit Member screen.

Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

Instructions

To edit a member's affiliations, make your desired changes and click edit.

Field Descriptions:

- Delete - yes or no, if allowed
- Description - a description of the affiliation (e.g., "Primary Lodge").
- Date - the date the member joined the lodge in MM/DD/YYYY format
- AR Year - the Annual Return on which this affiliation should appear
- Lodge (Chartered-Merged) - the lodge the person affiliated with. The entries list the name/number of the lodge, the date it was chartered and the date it merged. Lodges that are ancestors of lodges the member has an affiliation with are also listed.
- Type - one of the following
 - Primary - the lodge the member first joined in this jurisdiction or a descendant of that lodge
 - Secondary - another lodge to which the member belong(s/ed)
 - Merged - This is a lodge the member belonged to before it merged
- Honorary - indicates that this is an honorary affiliation
- Date Rec'd - the date the affiliation was recorded
- Force AR - yes or no, force the AR year on the affiliation to the date of the affiliation
- From Lodge (#,Name,Location,Jurisdiction - The number, name, location, and jurisdiction of the lodge from which the member affiliated.

Notes

- Typical Descriptions include:
 - Primary Lodge - the member's primary affiliation
 - Merger of A, B - the affiliation was produced by the merger of lodges A and B
 - Du/Pl affil from A - secondary affiliation from lodge A
- If the lodge for an affiliation is set to an ancestor lodge (i.e., one that has merged), additional affiliations with all descendants will be created when the form is submitted
- All secondary affiliations should have a "From Lodge" although the system does not require it
- Forcing the AR year for an affiliation can cause a variance on the current annual return

1.1.1.2 Edit Events

Navigation

The Edit Events screen can be accessed from the "events" tab of the Edit Member screen.

Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

Instructions

To edit a member's events, make your desired changes and click edit.

Field Descriptions:

- Event Description - the last generated description for this event
- Date - the date the event occurred
- Lodge (Chartered-Merged) - the lodge the person affiliated with. The entries list the name/number of the lodge, the date it was chartered and the date it merged. Lodges that are ancestors of lodges the member has an affiliation with are also listed.
- Delete - yes or no, if allowed
- AR Year - the Annual Return on which this event should appear
- Force AR - yes or no, force the AR year on the event to the date of the event

Notes

- Deleting events will not alter a member's status
- Deleting degree events for a member will revert the member through the degrees
- Forcing the AR year for an event can cause a variance on the current annual return
- Affiliations, in MORI, are not events so they do not appear on this screen. Consult the Edit Affiliations screen for more information

1.1.1.3 Add Office

Navigation

The Add Office Held screen can be accessed from the "offices held" tab of the Edit Member screen.

Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

Instructions

To add an office held record, make your desired changes and click add.

Field Descriptions:

- Office - select the office, or enter the office under 'Other' to the right
- Lodge - select the lodge, or enter the lodge under 'Other' to the right
- District - select the district, or enter the district under 'Other' to the right
- Jurisdiction - select the jurisdiction, or enter the jurisdiction under 'Other' to the right
- From (year) - the 4-digit year that they started
- To (year) - the 4-digit year that they started
- Comments - any additional notes about the office
- Remove - yes or no -- removes the record

Notes

- If the jurisdiction is not listed, it may not be recognized by Grand Lodge and therefore the office might not be either.

1.1.1.4 Edit Office

Navigation

The Edit Office Held screen can be accessed from the "offices held" tab of the Edit Member screen.

Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

Instructions

To edit an office held record, make your desired changes and click edit.

Field Descriptions:

- Office - select the office, or enter the office under 'Other' to the right
- Lodge - select the lodge, or enter the lodge under 'Other' to the right
- District - select the district, or enter the district under 'Other' to the right
- Jurisdiction - select the jurisdiction, or enter the jurisdiction under 'Other' to the right
- From (year) - the 4-digit year that they started
- To (year) - the 4-digit year that they started
- Comments - any additional notes about the office
- Remove - yes or no -- removes the record

Notes

- If the jurisdiction is not listed, it may not be recognized by Grand Lodge and therefore the office might not be either.

1.2 Add Member

Navigation

The Add Member screen can be accessed by selecting "Membership > Add Member" from the menu.

Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

Instructions

To add a member, enter the information into the form and click 'next'. If the form reloads without error, click 'confirm' to complete the form.

Field Descriptions:

- First Name - the member's first name
- Middle Name - the member's middle name
- Last Name - the member's last name
- Spouse - the first or full name of the spouse
- Lodge - the lodge to which the member is being added
- Birth Date - the member's date of birth in MM/DD/YYYY format
- Birth Place - the member's city/state of birth
- Occupation - the member's occupation
- Proposed By (GL#) - the GL Number of the member who proposed the member being added. This can be found using the Find Function detailed below.
- Special Status
 - None - This is a normal member
 - Guest - This person is being entered as a guest of the lodge to be included in mailings and such
 - Subscription Only - This person is being entered to receive the magazine
 - Widow - This is a widow of a member
- Degrees
 - Initiated - The date the member was initiated in MM/DD/YYYY format
 - Passed - The date the member was passed into fellowcraft in MM/DD/YYYY format
 - Raised - The date the member was raised to Master Mason in MM/DD/YYYY format
- contact information
 - Home Address - the member's address for most/all of the year
 - Address 1 - first line of the address of c/o for an organization
 - Address 2 - second line of the address
 - City - the city (required if foreign country is blank)
 - State/Province - the state or province (required if foreign country is blank)
 - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
 - Foreign Country - the country (blank for US)
 - Phone - phone number at this address
 - Fax - fax number at this address
 - Snowbird Address - another address at which member summers/winters
 - Address 1 - first line of the address of c/o for an organization
 - Address 2 - second line of the address
 - City - the city (required if foreign country is blank)
 - State/Province - the state or province (required if foreign country is blank)
 - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
 - Foreign Country - the country (blank for US)
 - Phone - phone number at this address

- Fax - fax number at this address
- Work Address - the address where the member works. (Note: the system will not produce labels for this address)
 - Company - the company where the member works
 - Address 1 - first line of the address of c/o for an organization
 - Address 2 - second line of the address
 - City - the city (required if foreign country is blank)
 - State/Province - the state or province (required if foreign country is blank)
 - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
 - Foreign Country - the country (blank for US)
 - Phone - phone number at this address
 - Fax - fax number at this address
- Snowbird Effective
 - From - month/day to begin using the snowbird address as their primary address
 - To - month/day to stop using the snowbird address as their primary address
- Email Address - the person's email address
- Cell Phone - the person's cell phone number
- Privacy - if checked, limits display of the contact information in some isolate circumstances (e.g., on the Grand Lodge Roster)

Find Function

Clicking a "find" link next to a GL Number field will launch a "Finder" window that works exactly like the find member screen. Clicking "select" on the finder screen will populate the related field with the desired GL Number.

Notes

- A member is only added when they are completely new. A member from another lodge affiliating with a lodge should be entered through either the Add Affiliation or the Add Foreign Affiliation screen
- degrees are only required if the person being added is a member

1.3 Add Affiliation

Navigation

The Add Affiliation screen can be accessed by selecting "Membership > Add Affiliation" from the menu.

Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

Instructions

To affiliate a member of a lodge in this jurisdiction with another lodge in this jurisdiction, enter the information on this form and click 'next'. If you are then permitted, click 'confirm'.

Field Descriptions:

- GL# - the Grand Lodge Number of the member affiliating. This can either be typed or selected through the Find Function detailed below.
- Lodge - the Lodge with which the member is affiliating

- Date - the date of the affiliation in MM/DD/YYYY format
- Honorary - indicates that this is an Honorary affiliation
- Name - the member's name
- Status:
 - Inactive - this is a member from the inactive database
 - Deceased - this member is deceased
 - Non-Affiliated - the member is not an active member of any lodge in this jurisdiction
 - Suspended - the member is suspended
 - Expelled - the member is expelled
 - Unaffiliated - the member is unaffiliated
 - Honorary - the member is honorary in every lodge to which they are affiliated in this jurisdiction
 - Widow - this person is a widow
 - Entered Apprentice - this person is an Entered Apprentice
 - Fellowcraft - this person is a Fellowcraft
 - Good Standing - this person is in Good Standing
 - Subscriber - this person is a subscriber to the magazine
 - Donor - this person is a donor
 - Guest - this person is a guest
- Affiliations - a list of lodges to which they are affiliated already:
 - Lodge - the number of the lodge.
 - Name - the name of the lodge
 - Date - the date they affiliated with the lodge
 - Jurisdiction - the jurisdiction the lodge is in
 - Status:
 - Lodge Suspended - The lodge has had its charter suspended
 - Lodge Forfeited - The lodge forfeited its charter
 - Lodge Merged - The lodge has merged with another lodge
 - Lodge Surrendered - The lodge has surrendered its charter
 - Lodge Under Dispensation - The lodge is under dispensation
 - Master Mason - The member is a master mason
 - Fellowcraft - The person is a fellowcraft
 - Entered Apprentice - The person is an entered apprentice
 - Honorary - The member is honorary in this lodge
 - Widow - The person is a widow
 - Inactive - The person is inactive, as described above
 - Dimitted - The member has dimitted from this lodge
 - NPD - The member has been flagged for Non-Payment of Dues
 - Cleared - The member has been cleared of their NPD status
 - Dropped - The member was dropped from the roles due to Unaffiliation or Expulsion
 - Pending Restoration - The member has been restored in this lodge, but is pending restoration in another
 - Withdrawn - The person withdrew from this lodge
 - Donor - The person is a donor who's donations are associated with this lodge
 - Subscriber - The person is a subscriber to the magazine in association with this lodge
 - Guest - The person is a guest of this lodge
 - Invalid - The person/member is in an invalid state
 - Unknown - The person/member is in an unknown state
 - <blank> - Similar to unknown, above

Find Function

Clicking a "find" link next to a GL# field will launch a "Finder" window that works exactly like the find member screen. Clicking "select" on the finder screen will populate the related field with the desired GL Number. This feature is only available to Grand Lodge users and the Finder will only allow lodge users to search within their lodge.

Notes

- If an attempt is made to affiliate a person who is not eligible, no "confirm" button will be present after hitting next.
- After hitting next, no changes can be made on the form. If something is wrong, please begin again

1.4 Add Foreign Affiliation

Navigation

The Add Foreign Affiliation screen can be accessed by selecting "Membership > Add Foreign Affiliation" from the menu.

Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

Instructions

To affiliate a member from another jurisdiction, enter the information and click 'next'. If the form reloads without error, click 'confirm' to complete the form.

Field Descriptions:

- First Name - the member's first name
- Middle Name - the member's middle name
- Last Name - the member's last name
- Spouse - the first or full name of the spouse
- Lodge - the lodge to which the member is being added
- Birth Date - the member's date of birth in MM/DD/YYYY format
- Birth Place - the member's city/state of birth
- Occupation - the member's occupation
- Proposed By (GL#) - the GL Number of the member who proposed the member being added. This can be found using the Find Function detailed below.
- Special Status
 - None - This is a normal member
 - Honorary - This is an honorary affiliation
- Degrees
 - Initiated - The date the member was initiated in MM/DD/YYYY format
 - Passed - The date the member was passed into fellowcraft in MM/DD/YYYY format
 - Raised - The date the member was raised to Master Mason in MM/DD/YYYY format
 - Lodge - The number of the lodge that either granted the degree on they are affiliating from
 - Lodge Name - The name of the lodge
 - Location - The city where the lodge is located
 - Jurisdiction - The Jurisdiction the lodge is in
- contact information
 - Home Address - the member's address for most/all of the year

- Address 1 - first line of the address of c/o for an organization
- Address 2 - second line of the address
- City - the city (required if foreign country is blank)
- State/Province - the state or province (required if foreign country is blank)
- Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
- Foreign Country - the country (blank for US)
- Phone - phone number at this address
- Fax - fax number at this address
- Snowbird Address - another address at which member summers/winters
 - Address 1 - first line of the address of c/o for an organization
 - Address 2 - second line of the address
 - City - the city (required if foreign country is blank)
 - State/Province - the state or province (required if foreign country is blank)
 - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
 - Foreign Country - the country (blank for US)
 - Phone - phone number at this address
 - Fax - fax number at this address
- Work Address - the address where the member works. (Note: the system will not produce labels for this address)
 - Company - the company where the member works
 - Address 1 - first line of the address of c/o for an organization
 - Address 2 - second line of the address
 - City - the city (required if foreign country is blank)
 - State/Province - the state or province (required if foreign country is blank)
 - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
 - Foreign Country - the country (blank for US)
 - Phone - phone number at this address
 - Fax - fax number at this address
- Snowbird Effective
 - From - month/day to begin using the snowbird address as their primary address
 - To - month/day to stop using the snowbird address as their primary address
- Email Address - the person's email address
- Cell Phone - the person's cell phone number
- Privacy - if checked, limits display of the contact information in some isolate circumstances (e.g., on the Grand Lodge Roster)

Notes

- If someone is affiliating from a Jurisdiction not in the list, it is possible that the Jurisdiction is not recognized. Contact Grand Lodge for assistance.

1.5 Lodge Roster

Navigation

The Lodge Roster report can be accessed by selecting "Membership > Roster" from the menu.

Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

Selecting this menu item produces the roster report.

Notes

- * The produced roster is up to the minute and contains the people who've gone inactive in the last year.

1.6 Pending Foreign Affiliations

Navigation

The Pending Foreign Affiliations screen can be accessed by selecting "Membership > Pending Foreign Affiliations" from the menu.

Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadOnly, grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen is used to manage the queue of pending affiliations. The queue is broken down into five sections: New, Pending, Approved, Elected and Denied. These are each detailed separately after the list of fields they have in common:

Field Descriptions:

- Name - the name of the potential new affiliate
- Lodge - the lodge with which they are affiliating
- Date / Date Elected - the date they are affiliating
- User - The user that added the pending affiliation
- Status As Of - The date the pending affiliation was added to this part of the queue.
- Options - broken down by list:
 - New - pending affiliations that have not been acted upon:
 - pending - moves the member to pending list
 - profile - generates a PDF of the pending affiliation profile
 - notes - access the Notes about this affiliation
 - edit - link to the Edit Pending Affiliation screen
 - Pending - pending affiliations that are being pursued with other jurisdictions:
 - profile - generates a PDF of the pending affiliation profile
 - notes - access the Notes about this affiliation
 - edit - link to the Edit Pending Affiliation screen
 - Approved - pending affiliations that have been approved:
 - profile - generates a PDF of the pending affiliation profile
 - notes - access the Notes about this affiliation
 - delete - remove the affiliation from the list. Can only be done by the lodge.
 - Elected – the lodge has elected the person to be a member
 - profile - generates a PDF of the pending affiliation profile
 - notes - access the Notes about this affiliation
 - delete - remove the affiliation from the list. Can only be done by grand lodge.

- Denied - pending affiliations that have been denied:
 - notes - access the Notes about this affiliation
 - delete - remove the affiliation from the list. Can only be done by the lodge.
 - reason - the reason for the denial is displayed under the affiliation

Editing Pending Affiliations

Editing pending affiliations is nearly identical to the Add Foreign Affiliation screen. The following changes are the only differences:

- "confirm" marks the pending affiliation approved
- "deny" marks the pending affiliation denied
- Reason allows for the documenting of a reason for the denial

Elect Function

Allows the lodge to enter the date the member was elected to join the lodge. The date must be on or after the day that the pending affiliation was approved.

Notes

- None

2 Lodge

Navigation

The lodge section of MORI can be reached under the "Lodge" heading of the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

The actual Lodge screen is just an index of the Lodge functions

Notes

- Functions on the Lodge screen are only listed if they are accessible to the user.

2.1 Member Types

Navigation

The Member Types screen can be accessed by selecting "Lodge > Member Types" from the menu.

Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen is used to manage the member types for a lodge. The top form lists the current member types and the second form allows for adding to the list. When updating the list, make the desired changes and click 'update'. When adding a member type, make the desired changes and click 'add'.

Field Descriptions:

- Member Types Form:
 - Member Type - the label given for this member type
 - Total Annual Dues - the total dues members of this type must pay (this should include any per capita to Grand Lodge)
 - Rename Type - a new label for this member type
 - Change Dues - a new amount for the dues
 - Delete - if no members have this member type, it can be deleted
- Add Member Type Form:
 - New Member Type - the label for the type being added
 - Total Annual Dues - the total dues members of this type will have to pay

Notes

- changing the dues for a member type will not adjust the dues retroactively

2.2 Dues Notices

Navigation

The Dues Notices screen can be accessed by selecting "Lodge > Dues Notices" from the menu.

Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen is used to author the dues notices to be mailed to members. As you make changes, they will appear in the preview section of the form. Changes will not be permanent until you click 'save'.

Field Descriptions:

- Dues Payable Date - this should be the complete phrase as to when payment is due (e.g., Payable upon receipt)
- Description - this provides three lines for entry of a description, comments, or anything
- Instructions - this provides two lines for instructions at the bottom of the notice (e.g., Make check payable to ...)

Notes

- The three lines of description can be used to request optional contributions.
- Clicking 'print' saves the form before proceeding to the Print Dues Notices screen.

2.2.1 Print Dues Notices

Navigation

The Print Dues Notices screen can be accessed by clicking "print" on the Dues Notices screen

Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This form is used to generate a PDF of Dues Notices for printing. What notices go into the PDF can be parameterized based on form input. Clicking 'preview notices' will generate the PDF of the notices. Clicking 'preview labels' will generate a PDF of the labels for the recipients of the notices.

Field Descriptions:

- Options:
 - Member Type - limit the PDF to one member type or include all
 - Sort By - sort by either their last name or their zip code
 - Number Per Page - Generate notices either three per page or one per page

Notes

- The labels produced through this function are 3 x 10 (30 labels per page).

2.3 Arrears Notices

Navigation

The Arrears Notices screen can be accessed by selecting "Lodge > Arrears Notices" from the menu.

Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen is used to author the arrears notices to be mailed to members. As you make changes, they will appear in the preview section of the form. Changes will not be permanent until you click 'save'.

Field Descriptions:

- Arrears Payable Date - this should be the complete phrase as to when payment is due (e.g., Payable upon receipt)
- Description - this provides three lines for entry of a description, comments, or anything
- Instructions - this provides two lines for instructions at the bottom of the notice (e.g., Make check payable to ...)

Notes

- The three lines of description can be used to request optional contributions.
- Clicking 'print' saves the form before proceeding to the Print Arrears Notices screen.

2.3.1 Print Arrears Notices

Navigation

The Print Arrears Notices screen can be accessed by clicking "print" on the Arrears Notices screen

Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This form is used to generate a PDF of Arrears Notices for printing. What notices go into the PDF can be parameterized based on form input. Clicking 'preview notices' will generate the PDF of the notices. Clicking 'preview labels' will generate a PDF of the labels for the recipients of the notices.

Field Descriptions:

- Options:
 - Member Type - limit the PDF to one member type or include all
 - Sort By - sort by either their last name or their zip code
 - Number Per Page - Generate notices either three per page or one per page

Notes

- The labels produced through this function are 3 x 10 (30 labels per page).

2.4 Lodge Summons

Navigation

The Lodge Summons screen can be accessed by selecting "Lodge > Lodge Summons" from the menu.

Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen is used to author lodge summonses. As you make changes, they will appear in the preview section of the form. Changes will not be permanent until you click 'save'. If you want to print a summons, click 'print'.

Field Descriptions:

- Summons Type:
 - Annual Meeting - includes standard copy for an annual summons
 - Other Meeting - includes standard copy for any other summoned communication
- First Paragraph (Annual) - paragraph to be included if this is an annual summons
- First Paragraph (Other) - paragraph to be included if this is an other summons
- Meeting Location - where the meeting will be held
- Meeting Date - date of the meeting
- Meeting Time - time of the meeting
- Meeting purpose - the purpose of the meeting
- Additional Text - any additional comments to go in as a last paragraph

Notes

- Clicking 'print' will also save changes made to the form before generating the PDF

2.5 Annual Report

Navigation

The Annual Report screen can be accessed by selecting "Lodge > Annual Report" from the menu.

Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen is used to generate the Annual Secretary's Report for a given year. To print the report, enter the year and click 'print'.

Notes

- The system will generate incomplete reports for future years.

2.6 Subordinate Roles

Navigation

The Subordinate Roles screen can be accessed by selecting "Lodge > Subordinate Roles" from the menu.

Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary

Instructions

This screen is used to manage Lodge Subordinate Roles (e.g., assistant secretaries). The list of subordinate roles will always contain one more than is defined to accommodate adding roles. Click 'update' when you are finished.

Field Descriptions:

- GLNumber - the Grand Lodge number of a member of the lodge who will act in this role. This can be found using the Find Function detailed below.
- Name - the name of the selected member
- Role - the role the member will act in
- Remove - yes to remove the member-role assignment or no to leave it

Find Function

Clicking a "find" link next to a GL Number field will launch a "Finder" window that works exactly like the find member screen. Clicking "select" on the finder screen will populate the related field with the desired GL Number.

Notes

- none

2.7 Certificates Of Election

Navigation

LODGE USERS: The Certificates Of Election screen can be accessed by selecting "Lodge > Certificates Of Election" from the menu.

GRAND LODGE USERS: The Certificates Of Election screen can be accessed by selecting "Lodges > Certificates Of Election" from the menu. This functionality is also available from the History Tab on a lodge's screen

Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, grandLodgeReadWrite, grandLodgeReadOnly

Instructions

LODGE USERS: This screen lists the Certificates Of Election for your lodge. To add the most recent Certificate Of Election, click "add". To add a historical Certificate Of Election, click "add historical". To access an individual Certificate, click 'view'.

GRAND LODGE USERS: This screen lists Certificates Of Election for all lodge where the certificate needs to be either approved or rejected. To add the most recent Certificate Of Election, click "add". To add a historical Certificate Of Election, click "add historical". To access an individual Certificate, click 'view'.

Field Descriptions:

- Lodge - the name and number of the lodge
- Year - The year the election took place
- Date - The date the election took place
- Status - The status of the Certificate
 - new - a new Certificate
 - new historical - a new Historical Certificate
 - approved - an approved certificate
 - rejected - a rejected certificate
- Options - Functions to act on the Certificate
 - view - takes you to the completed Certificate Of Election Form.

add button

Clicking the add button will bring you to the Certificate Of Election Form. The submitted certificate will be "new." If it is approved, it will change the active officers for the lodge

add historical button

Clicking the add historical button will bring you to the Certificate Of Election Form. The submitted certificate will be "new historical." If it is approved, it will not change the active officers for the lodge

Notes

- none

2.7.1 Certificate Of Election

Navigation

This screen is reached by clicking 'view', 'add', or 'add historical' on the Certificates Of Election screen.

Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, grandLodgeReadWrite, grandLodgeReadOnly

Instructions

This screen details a certificate of election. If you are entering a new certificate of election, fill in the appropriate fields and click 'submit'.

Field Descriptions:

- Lodge - the lodge in question. For historical certificates, ancestor lodges may be selected.
- Date - The date the election took place in MM/DD/YYYY format.
- Year - The year the election took place in YYYY format.
- Officers - These people must be members of the lodge (except the Tiler) and be a Master Mason in Good Standing. Each officers must be a different person.
 - Master - The GL Number of the new Master.
 - Senior Warden - The GL Number of the new Senior Warden.
 - Junior Warden - The GL Number of the new Junior Warden.
 - Treasurer - The GL Number of the new Treasurer.
 - Secretary - The GL Number of the new Secretary.
 - Senior Deacon - The GL Number of the new Senior Deacon.
 - Junior Deacon - The GL Number of the new Junior Deacon.
 - Tiler - The GL Number of the new Tiler.
 - Trustee(s) - The GL Number and years of service (in YYYY format) -- three are required

submit button

Clicking the submit button will queue the Certificate for Approval or Rejection by Grand Lodge.

approve button

Clicking the approve button will make the Certificate approved. If the certificate is new (as opposed to historical) the lodge will be updated accordingly.

reject button

Clicking the reject button will make the Certificate rejected.

delete button

Rejected Certificates can be deleted. Approved Certificates can not be deleted.

Notes

- none

5 Financial

Navigation

The Financial section of MORI can be reached under the "Financial" heading of the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

The actual Financial screen is just an index of the Financial functions.

Notes

- Functions on the Financial screen are only listed if they are accessible to the user.

5.1 Setup Dues

Navigation

The Setup Dues screen can be accessed by selecting "Financial > Setup Dues" from the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary

Instructions

If you are ready to setup dues, the screen will display the form to do so. When you're done filling out the form, click 'setup'.

Field Descriptions:

- Year - the year for which the dues will be collected. This will accept either the current year or next year only.

Notes

- This screen depends on the Lodge having defined Member Types and that all active members have member types.
- When this function is used, it creates dues for the specified year using the current rates specified for the Member Types.
- If the same year is entered twice, a dues liability will be created for members who have already paid their dues for that year.
- When this process runs, all outstanding dues for years before the year entered will be rolled to arrears.

5.2 Edit Arrears / Dues

Navigation

The Edit Arrears and Dues screen can be accessed by selecting "Financial > Edit Arrears / Dues" from the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary

Instructions

To use this screen, begin by selecting a member of the lodge from the list at the top of the screen. Members are broken down into "active", "inactive" and "non-master-mason" and listed alphabetically in that order.

Once a member is selected, you can edit their arrears and dues by year. There will always be one extra blank row of each kind to facilitate adding values. To remove an entry, erase its values. Click 'update' when you are done.

Field Descriptions:

- Member - the member in question

- Arrears - the member's arrears:
- Amount - the amount they owe
- Year - the year for which the arrears are owed
- Dues - the member's dues:
 - Amount - the amount they owe
 - Year - the year for which the dues are owed

Notes

- A negative amount for dues gives a credit toward the next payment.
- The arrears and dues displayed on this screen are the amounts the member currently owes.

5.3 Initialize Dues

Navigation

The Initiaize Dues screen can be accessed by selecting "Financial > Initialize Dues" from the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen allows you to set the member types and the total arrears and dues for all the members of your lodge. This screen is most handy when migrating to MORI from another application as it puts most of your dues management data entry into one place.

Field Descriptions:

- Active Members - these are members presently in good standing:
 - Member - the member in question
 - Member Type - the type of member the member is in the lodge (e.g., regular)
 - Total Arrears - the member's total outstanding arrears
 - Total Dues - the member's total outstanding dues
- Inactive Members - these are members not in good standing:
 - Member - the member in question
 - Member Type - the type of member the member is in the lodge (e.g., regular)
 - Total Arrears - the member's total outstanding arrears
 - Total Dues - the member's total outstanding dues

Notes

- Dues entered on this screen will be dated for the current year.
- Arrears entered on this screen will be dated for the previous year.
- In relation to the Setup Dues screen, you only need to set the member type for the active members to proceed.
- Once a value is set on this screen, it cannot be changed. Member Types can be set on the Edit Member screen. Dues and Arrears can be set on the Edit Arrears and Dues screen

5.4 List Paid / Unpaid

Navigation

The List Paid and Unpaid screen can be accessed by selecting "Financial > List Paid / Unpaid" from the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen collects reporting options for detailing the Dues and Arrears payments for a lodge's members.

Payments Made

This lists the payments made by users. It will list all the payments or just those made since a specified year (inclusive). This will produce a PDF report.

Dues and Arrears Owed

This builds a combined list of all the Dues and Arrears payments owed by either active members or all members. This will produce a PDF report.

Dues Owed

This builds a combined list of all the Dues payments owed by either active members or all members. This will produce a PDF report.

Arrears Owed

This builds a combined list of all the Arrears payments owed by either active members or all members. This will produce a PDF report.

Notes

- None

5.5 Member Payments

Navigation

The Member Payments screen can be accessed by selecting "Financial > Member Payments" from the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

To use this screen, begin by selecting a member of the lodge from the list at the top of the screen. Members are broken down into "active", "inactive" and "non-master-mason" and listed alphabetically in that order.

Once a member is selected, you can enter new payments for the member, view their outstanding dues and view their payment history. When you are done entering new payments, clicking "calculate" will show how a dues payment will affect their outstanding dues. Clicking 'post' will commit the payments to the database.

Field Descriptions:

- Enter New Payments:
 - Member Name - the name of the member

- Total Outstanding - the member's total owed dues and arrears
- Arrears - the amount, by year, that the member owes
- Dues - the amount, by year, that the member owes
- Payments - the five rows are for entering payments with the following attributes:
 - Date - the date the payment was made
 - Amount - the amount of the payment in #####.## format (i.e., no dollar signs or commas).
 - Type - the type of payment (e.g., cash)
 - Category - the income category to which the payment should be attributed. Only 'DUES' category payments will be applied to outstanding arrears and dues
 - Comment - any notes about the payment (e.g., check number)
- Payment History:
 - Payments - the payments this member has made -- in reverse date order
 - Date - the date of the payment
 - Amount - the amount of the payment
 - Type - the type of payment
 - Category - what income category (this will show the year as well for dues payments)
 - Comment - any comments associated with the payment

Notes

- Once entered, payments are immutable.
- To correct a mis-entered payment, simply enter the same payment again, but with the amount being negative. Explain that that is a VOID TRANSACTION in the comments.
- Reversing an invalid payment will not restore an unpaid arrears amount. If you are cancelling a dues payment, you may need to proceed to the Edit Arrears and Dues screen to restore the outstanding balance to the right years.

5.6 Non-Member Payments

Navigation

The Non-Member Payments screen can be accessed by selecting "Financial > Non-Member Payments" from the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen is used to enter payments to the lodge when the payer is not a member. Each row in the table represents either a whole payment or part of a payment of the payment must be allocated to multiple categories.

Field Descriptions:

- Date - the date the payment was made
- Amount - the amount of the payment in #####.## format (i.e., no dollar signs or commas).
- Type - the type of payment (e.g., cash)
- Category - the income category to which the payment should be attributed.
- Comment - any notes about the payment (e.g., check number). This should include the name of the Payer.

Notes

- Non-Member payments appear in the Budget , the Cash Book, and the Cash To Treasurer Reports.

5.7 Budget

Navigation

The Enter Budgets screen can be accessed by selecting "Financial > Budget" from the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

The budget is broken down into three sections: Income Categories, Budget Categories and Budget Items. For each section, there will always be an extra blank row for entering the next item. When you are done editing your budget, click 'update'.

It is important to note that Budgets are tracked in arbitrary "Periods." The first period begins when a lodge starts using MORI. A period ends whenever the lodge closes the current budget period by clicking on the "close budget period" button on this screen (detailed below).

Income Categories

Income categories categorize all money received by the lodge. The system will always generate a "DUES" income category -- this category should be used to track dues payments.

Field Descriptions:

- Description - the name of the category
- Amount - the amount of income expected in #####.## format (i.e., no dollar signs or commas).
- Delete - if there is no income allocated to this category, the category can be deleted.

Budget Categories

Budget Categories allow for the aggregation of Budget Items. For example, a budget category of 'Building Expenses' may have Budget Items like 'Heat'.

Field Descriptions:

- Description - the name of the category
- Delete - if there are no budget items associated with this category, it can be deleted.

Budget Items

Budget Items, in conjunction with Vouchers track all money spent by the lodge.

Field Descriptions:

- Description - the name of the item
- Category - the Budget Category to which this item belongs
- Amount - the amount of income expected in #####.## format (i.e., no dollar signs or commas).
- Delete - If there are no expenses allocated to this Item, it can be deleted

Budget Report

Clicking 'print' on the Enter Budgets screen will allow you to print a report of the budget for any given period.

Close Budget Period

Clicking 'close budget period' on the Enter Budgets screen will close the budget for the current financial period and will create a new budget that is a duplicate of the one just closed as a starting point.

Notes

- If the "DUES" Income Category is not used to track dues payments, the payments will not automatically lower the dues and arrears owed.

5.8 Vouchers

Navigation

The Vouchers screen can be accessed by selecting "Financial > Vouchers" from the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

By default, this screen lists the vouchers for the current period. (For an explanation of periods, see Enter Budgets). To list vouchers for a different period, select the period and click 'find'. The list can be resorted by clicking on the headings at the top of the list.

Field Descriptions:

- Number - the number of the voucher
- Date - the date of the voucher
- Check - the number of the check used for the expense
- Payee - to whom the voucher is written
- Amount - the total amount of the voucher
- Options:
 - edit - edit the voucher on the Edit Voucher screen

Add Voucher

To add a voucher, click the 'add' button. Functionality on the add voucher screen is identical to the Edit Voucher screen.

Voucher Reports

Access the Voucher Reports screen by clicking "reports". On that screen you can generate a list of vouchers by date and/or payee. The resulting report will be in PDF format.

Notes

- none

5.8.1 Edit Voucher

Navigation

The Edit Voucher screen can be accessed by clicking "edit" next to a voucher on the Vouchers screen.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

Use this screen to edit vouchers. Click "save" when you are done, or click "add another" to create a new voucher. Any changes made to a voucher will appear immediately in the preview pane but will not be saved until the save button is clicked.

Field Descriptions:

- Voucher Number - the number of the voucher
- Voucher Date - the date of the voucher
- Check Number - the number of the check
- Pay To The Order Of - the payee for the check
- Amount - the amount in ####.## format (i.e., no dollar signs or commas)
- Purpose - the purpose of the expense (to appear on the printed voucher)
- Void - if the voucher is invalid, that can be indicated here
- Budget Allocation - if your lodge has established budget items on the Enter Budgets screen, you can allocate the expense here:
 - Budget Item - The Budget Category/Budget Item to which the expense should be allocated
 - Amount - the amount for this allocation in ####.## format (i.e., no dollar signs or commas)

Print Voucher

You can print a voucher by clicking "print" under the preview pane. Before the voucher prints, MORI will first attempt to save the changes. If the changes are not valid, the voucher will not print

Notes

- If the voucher is not void and your lodge has a budget, the allocation must be completed.
- Three lines are initially provided for the allocation of expenses to budget items. More will appear as needed
- The total of allocations must match the amount of the voucher.
- Voiding a voucher will remove any budget allocations

5.9 Cash Book

Navigation

The Secretary's Cash Book screen can be accessed by selecting "Financial > Cash Book" from the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen allows for the printing of a Secretary's Cash Book report. Simply fill in the desired parameters and click 'print'.

Field Descriptions:

- From Date - in MM/DD/YYYY format, the inclusive date to start the report
- To Date - in MM/DD/YYYY format, the inclusive date to end the report
- Sort Order - order to sort the report:
 - date/category - date first then income category
 - category/date - income category first then date
- Exclude Non-Member Payments - useful to see only payments from members

Notes

- Either the from or to date must be present

5.10 Cash To Treasurer

Navigation

The Cash Paid To Treasurer screen can be accessed by selecting "Financial > Cash Paid To Treasurer" from the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen serves two purposes: the collection of payments received by the lodge into a dated grouping and the reporting of those dated groupings.

To group together payments received but not given to the treasurer into a report, click 'tabulate'. Once you click 'tabulate' a Receipt Summary appears totalling the amount by income category. Click 'confirm' to date the receipts as given to the treasurer.

To view a Receipt Summary of cash given to the treasurer, select the date the cash was given and click 'find'. Once the summary is displayed, you can elect to print either a Treasurer's Report or a segment of the Secretary's Cash Book containing the receipts that went into this dated grouping.

Notes

- The 'tabulate' button is only the first step in grouping payments. To actually group the payments, you must click 'confirm'.

5.11 Calculate Checkbook

Navigation

The Calculate Checkbook Balance screen can be accessed by selecting "Financial > Calculate Checkbook" from the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen generates a PDF resembling a checkbook register that starts with the starting date and balance entered in the form. It then, in date order, subtracts vouchers and adds all cash given from the secretary to the treasurer. To get the PDF complete the form and click 'calculate'.

Field Descriptions:

- Beginning Date - the date to begin the register at in MM/DD/YYYY format
- Beginning Balance - the amount to begin the register at in ####.## format (i.e., no dollar signs or commas)

Notes

- Any payments collected by the secretary and not given to the treasurer (through the Cash To Treasurer screen) will not show up in the register.

6 Mail Room

Navigation

The Mail Room section of MORI can be reached under the "Mail Room" heading of the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, grandLodgeReadOnly, lodgeSecretary, lodgeAssistantSecretary.

Instructions

The actual Mail Room screen is just an index of the Mail Room functions.

Notes

- Functions on the Mail Room screen are only listed if they are accessible to the user.

6.6 Reports / Labels

Navigation

The Member Reports and Labels screen can be accessed by selecting "Mail Room > Reports/Labels" from the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen is used to produce labels and member reports. The production of these is done in two stages.

In the first stage, you use the various criteria available to build a "buffer" of members. The buffer will persist until it is cleared or until you have to login again. To clear the buffer, click the 'clear buffer' button.

The second stage involves the actual production of the reports and/or labels. This is done by either selecting the report from the reports section of the label/file format from the labels section.

Field Descriptions:

- **Buffer Building** - fields for building the buffer:
 - Members by Status - add members to the buffer by their status
 - Members by Birth Month - add members to the buffer by the month they were born
 - Members by Raised Date - add members by the date they were raised From and To inclusively in MM/DD/YYYY format
 - Members by Raised Month - add members by the month they were raised
 - Members by Mailing List - add members by the mailing lists to which they belong
 - Single Members - add members individually. This is broken down by active members, inactive members, and non-master mason members
- **Reports:**
 - Select Report - the report you would like (see below)
- **Labels:**
 - Select Labels - the label/file format (see below)
 - Sort By - the order by which the labels will be sorted
 - name - sort in last, first order
 - zip - sort in zip/postal code order

Contact List Report

This screen can produce a Contact List in PDF format for the members in the buffer. Select "contact list" from the list of reports and click 'print'.

Years Of Service Report

This screen can produce a Years of Service report in PDF format for the members in the buffer. Select "years of service" from the list of reports and click 'print'.

Age/Birth Date Report

This screen can produce a Age/Birth Date report in PDF format for the members in the buffer. Select "age/birth date" from the list of reports and click 'print'.

Avery 5160/8160 Labels

This screen can produce 3 columns of 10 labels formatted for the Avery 5160 labels. Select "Labels Avery 5160..." from the list of labels and click 'print'.

Avery 5161/8161 Labels

This screen can produce 2 columns of 10 labels formatted for the Avery 5161 labels. Select "Labels Avery 5161..." from the list of labels and click 'print'.

Number 10 Envelopes

This screen can produce label output to go onto Number 10 envelopes. Select "Envelopes No. 10" from the list of labels and click 'print'.

Excel (DBF) File

This screen can produce an Excel file in DBF format of the buffer. Select "Excel (DBF) File..." from the list of labels and click 'print'. The file will not be sorted.

Notes

- For most selection criteria, more than one thing can be selected at a time. For example, When doing member statuses, you can select active members and guests and add them both to the buffer with one click of 'add to buffer'
- The buffer automatically de-duplicates the members added to it. For example, if you added active members and the members of a mailing list into the buffer, anyone matching both criteria will only appear in the buffer once.

6.7 Mailing Lists

Navigation

The Edit Mailing Lists screen can be accessed by selecting "Mail Room > Mailing Lists" from the menu.

Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

This screen controls the editing of lodge mailing lists.

Field Descriptions:

- Mailing Lists - list of the already created lists:
 - Mailing List - name of the mailing list
 - Rename Mailing List - new name for the mailing list
 - Delete - if no members are on the list, you can delete it
- Add Mailing List - form to add new mailing lists:
 - New Mailing List - name of the new mailing list

Notes

- If you wish to delete a list and are not sure who's on it, you can find out by producing a contact list for list members on the Reports/Labels screen.

9 Help

Navigation

The help feature can be reached by selecting 'Help' from the pull-down menu

Access

Anyone can access the complete help feature

Instructions

The help feature has a contents page that matches the ordering of the menu

There is also an index to jump to a desired function by keyword.

Notes

- links in blue/lavender link to functions
- links in green are glossary terms which populate the glossary frame

9.3 About

Navigation

The about page can be reached by going to "Help > About" in the menu

Access

Anyone can access the about page

Instructions

The about page details who created MORI and when along with links to the licensing

Notes

- none

9.4 Documents

Navigation

The documents page can be reached by going to "Help > Documents" in the menu

Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

Instructions

The documents page contains documents for reference by lodge officers.

Notes

- none

10 Language

Navigation

The language menu option allows you to select the language you wish to see MORI in.

Access

Anyone has access to the language feature at any time

Instructions

To switch languages, simply select the desired language from the language pull-down menu

Notes

- The default language is English. It will be displayed when any text element is missing its other language alternative.

11 Account

Navigation

The account section of MORI can be reached under the "Account" heading of the menu.

Access

The account section of the menu is accessible to everyone.

Instructions

The actual Account screen is just an index of functions.

Notes

- When a user possesses more than one role, their roles will be listed in the Account Menu and selecting a role from the menu will change the user's active role.
- It is not necessary to switch between roles unless they are mutually exclusive (e.g., a Secretary of two lodges must switch roles to access the other lodge)
- The user's active role will be highlighted in bold

11.1 Login

Navigation

Whenever you first visit MORI, you'll be presented with the login screen. If you navigate away from it, you can return by going to "Account > Login" in the pull-down navigation.

Access

Any user who is not logged-in can access the login screen.

Instructions

Enter your username (login) and password and click 'submit' to login to MORI. If your login also required a key, you'll need to Insert Your Key before logging in. The key will be retained in your browser to facilitate faster future access.

Notes

- You should not access MORI from a public terminal
- If your browser stores your login information, set a master password
- Three failed login attempts will lock an account

11.2 Logout

Navigation

The logout function can be reached by going to "Account > Logout" while logged into the MORI system.

Access

Any user who is logged-in can access the logout function.

Instructions

The logout function is completely automatic and works simply by selecting it from the navigation.

Notes

- Anything kept in your session (e.g., labels to print) will be lost.

11.3 Update Account

Navigation

The Update Account screen, for your own account, can be reached by going to "Account > Update Account" while logged into the MORI system.

Admin and LodgeAdmin users may reach the Update Account screen for other users through the Manage Accounts screen.

Access

Any user who is logged-in can access the Update Account screen for their own account.

Admin users can access the Update Account screen for any user.

LodgeAdmin users can access the Update Account screen for any Lodge user.

Instructions

Instructions for this screen vary depending on both the user being updated and the role of the updater:

1. Self-Update

A user updating their own account can update their full name, first name, and the password they use to access the system.

2. Grand Lodge User by Admin

An Admin user can update the full name, first name, password, and allowed Grand Lodge roles of any Grand Lodge user.

3. Lodge User by Admin/LodgeAdmin

Any Admin user can update the full name and first name of a Lodge User and can reset their account (allowing the user to re-create it.)

Notes

- Under no circumstances is a members current password revealed on this screen or any other.
- All Grand Lodge users must have a role
- Lodge users roles are determined based upon Lodge records in MORI and are recalibrated with each login.

11.5 Create Account

Navigation

The Create Account screen can be reached by going to "Account > Create Account" when not logged-in to the MORI system.

Access

Any user who is not logged-in can access the Create Account.

Instructions

The Create Account function is for Lodge users to create an account to access the system.

On the first screen, the user will be prompted to provide their Grand Lodge #, the number of any Lodge to which they belong, and their date of Birth. If a corresponding member record is found for which an account does not already exist, they will proceed to the next screen.

On the next screen, the user will be prompted to enter their choice of password. Once the password is entered, the account will be created.

For a lodge user, creating an account is only the first step to access. To access the system, a Lodge user will also need a key. That key will be mailed from Grand Lodge once the account has been created.

Notes

- Birth Date should be expressed in mm/dd/yyyy format.
- Passwords must consist of a minimum of 8 characters made up of letters and atleast one number.

11.7 Insert Key

Navigation

The Insert Key screen can be reached by going to "Account > Insert Key" when not logged-in to the MORI system.

Access

Access to the Insert Key screen is open to anyone not logged-in to the system

Instructions

The purpose of the Insert Key screen is to set a Lodge user's key in their browser.

To set your key, enter the key provided by Grand Lodge into the form and click "insert".

Notes

- To test that your browser is retaining the key, simply press 'test' on this screen.
- If more than one person uses the same computer to access MORI, you'll need to change keys using this screen as well.

A. Auxiliary Functions

This section is coming soon.