2018 January Edition

SENTINEL V2 TRAINING MANUAL

Supreme Council, 33°, SJ

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Supreme Council, 33°

1733 16th Street, NW

Washington, DC 20009

Phone 202-232-3579 • Fax 202-222-0292

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INTRODUCTION

THIS MANUAL IS INTENDED AS A TRAINING GUIDE FOR ORIENT AND VALLEY SENTINEL OFFICERS AND STAFF

Sentinel is your Valley's database management system. Sentinel is the tool you will use for virtually all aspects of membership management from posting dues payments to entering new members. Sentinel will allow you to run queries to create reports, manage Valley events, assign members to play casts, upload documents and photos, and email members directly from within Sentinel.

These are but a few of the many features that Sentinel provides. This manual will cover Sentinel's many features, but keep in mind that Sentinel provides tools for performing many types of queries and creating many different reports. If we were to include instructions for all of these queries and reports, this manual could easily go beyond five hundred pages in length. Therefore, because all queries and reports are created using the same basic steps, we will leave it to the user to apply these steps for whatever query or report is needed.

However, this manual is not your only source of instruction. You will find video tutorials within the Sentinel application under the Video Tutorials tab, and the Supreme Council Computer Services' staff members are available to instruct you as well. Please call on them for assistance any time at 202-232-3579.

GETTING STARTED

In this section you will learn about Sentinel user accounts, the Sentinel log in screen, and the computers and devices that are compatible with Sentinel

HOW TO CREATE YOUR SENTINEL USER ACCOUNT

Sentinel accounts are only created for Orient and Valley officers and staff members. Accounts are never to be created for the general membership.

INDIVIDUAL VALLEY ACCOUNT

Each Valley should have a Sentinel Valley Administrator. This person is usually the Valley Secretary, although a Valley may have multiple Sentinel Valley Administrators. Administrators can create, edit, and delete Sentinel user accounts for access to their Valley's Sentinel database. Therefore, the first point of contact for obtaining your Sentinel account should be your Valley Secretary.

However, if you are a newly appointed Valley Secretary and there is no existing Sentinel administrator in your office to create your account, please contact the Supreme Council Computer Services at 202-232-3549 for assistance.

MULTIPLE VALLEY ACCOUNT (ORIENT ACCESS)

A Sentinel Orient account allows users to access all Valleys in their Orient. Only the Supreme Council Computer Services staff can create these accounts, and they are created at the discretion of the Orient's SGIG or Deputy.

Before creating an Orient account, the Supreme Council Computer Services must have a written note of authorization on file from the SGIG or Deputy. If a person requests Orient access, but we do not have the proper authorization, our office will contact the SGIG or Deputy.

SYSTEM REQUIREMENTS

This section covers the software and hardware that you will need to use Sentine.V2

SOFTWARE

Sentinel is a Web-based application. This means that you do not need to install any software to access and use this database management system. However, Sentinel allows you to create reports, and the system displays these reports in pdf format. To view these reports you will need Adobe Reader. This pdf reader usually comes pre-installed on new computers. However, if you do not have it, you may download the free version at Adobe.com. Also, Sentinel gives you the option of viewing these reports in Microsoft Word and Excel. To use these options, you will need to have Word and Excel installed on your computer or device.

LOGGING IN

You will need a username and password to access Sentinel. If you do not already have an account, please contact your Sentinel Valley administrator. If you are a new Sentinel Valley administrator without a username or password, please contact the Supreme Council Computer Services at 202-232-3579.

IMPORTANT MESSAGES

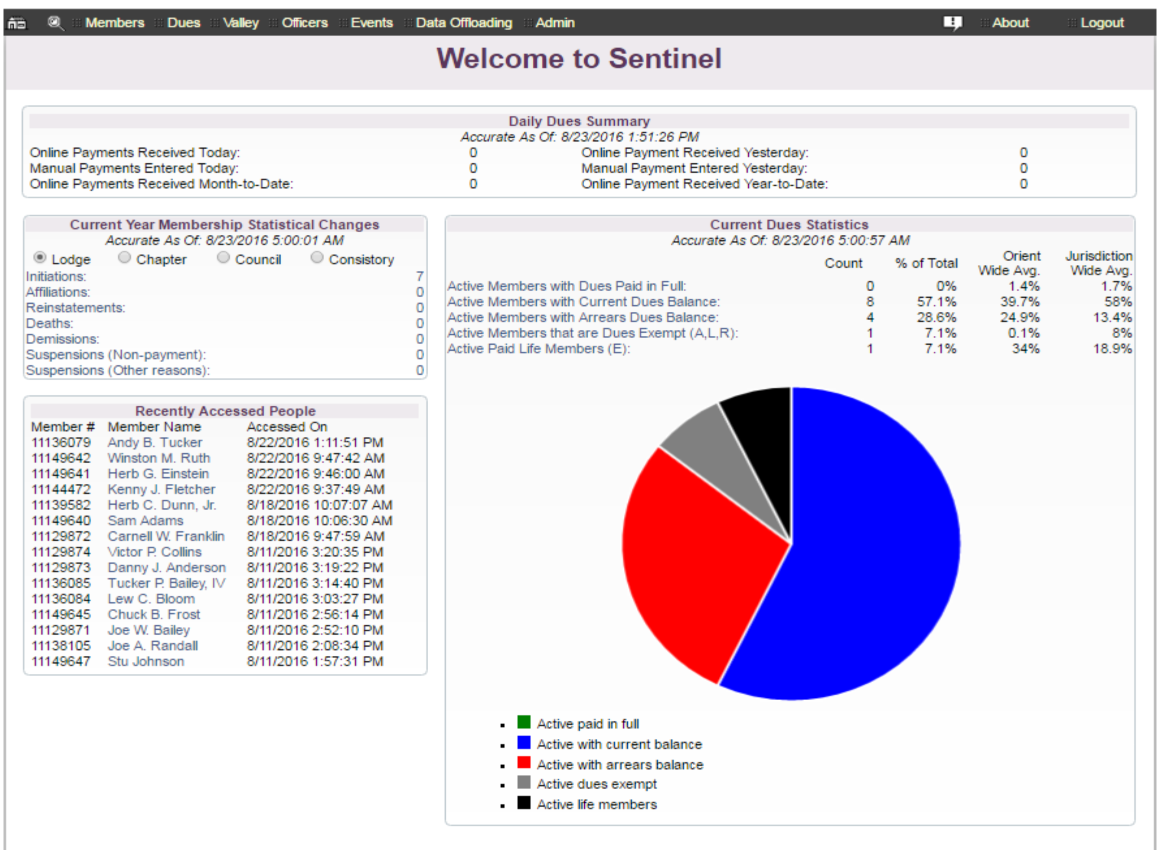
Always check the "Important Messages" on the login screen. This area is used by the Computer Services staff to display information that is useful to the Valleys such as important dates and deadlines. Please check for new messages each time you log in to Sentinel.

CHAPTER 1: WELCOME TO SENTINEL SCREEN

The **Welcome to Sentinel** is the first screen that you will see when you log in to your Valley's database. The purpose of the screen is to give you a quick view of your Valley's statistics without performing a member search.

Here is an example of a typical **Welcome to Sentinel** screen. Notice that there are three major sections:

- Daily Dues Summary
- Current Year Membership Statistics
- Current Dues Statistics
- Recently Accessed People



There is a lot of information on the **Welcome to Sentinel** screen, so let's break it down into sections.

1.1 DAILY DUES SUMMARY

The **Daily Dues Summary** displays a total count of online and manual dues payments occurring during a day, month, or year. Online payments are any credit card payments processed through the Membership Portal at www.ScottishRite.org or any credit card payment entered by a Valley user directly into Sentinel. Manual dues payments are check and cash payments entered by a Valley user directly into Sentinel.

You can click on each option to view a list of the members who paid and to create a report.

Daily Dues Summary			
Accurate As Of: 8/23/2016 1:56:14 PM			
Online Payments Received Today:	0	Online Payment Received Yesterday:	0
Manual Payments Entered Today:	0	Manual Payment Entered Yesterday:	0
Online Payments Received Month-to-Date:	4	Online Payment Received Year-to-Date:	66

1.2 CURRENT YEAR MEMBERSHIP STATISTICAL CHANGES

The **Current Year Membership Statistical Changes** displays a point-in-time total count of membership updates during the current statistical year by Lodge, Chapter, Council, and Consistory. A "statistical year" does not coincide with a "calendar year." Statistical change processing for a current year does not begin until February 1 of that year.

A "Statistical Year" runs from February 1 through January 31

This system is based on the dues payment schedule which has December 31 as the final due date for the next year's dues. For example, **2017** dues are due by December 31, **2016**. Members owing more than one year's dues are subject to suspension in accordance with the *Statutes of the Supreme Council.* Therefore, Valleys report their end-of-year suspensions during the month of January. As a result, the full month of January is needed to process all of these Valley suspensions and prepare the previous year's Annual Report, which in our example would be the 2016 Annual Report.

Current Year Membership Statistical Changes	
Accurate As Of: 8/23/2016 5:00:01 AM	
◉ Lodge ○ Chapter ○ Council ○ Consistory	
Initiations:	15
Affiliations:	4
Reinstatements:	8
Deaths:	29
Demissions:	6
Suspensions (Non-payment):	0
Suspensions (Other reasons):	0

1.3 RECENTLY ACCESSED PEOPLE

Recently Accessed People displays a list of member records for any member **Profile** screen that the user has recently viewed. You can click on a name to go directly to that member's record without performing a search.

Recently Accessed People

Member #	Member Name	Accessed On
11136079	Andy B. Tucker	8/22/2016 1:11:51 PM
11149642	Winston M. Ruth	8/22/2016 9:47:42 AM
11149641	Herb G. Einstein	8/22/2016 9:46:00 AM
11144472	Kenny J. Fletcher	8/22/2016 9:37:49 AM
11139582	Herb C. Dunn, Jr.	8/18/2016 10:07:07 AM
11149640	Sam Adams	8/18/2016 10:06:30 AM
11129872	Carnell W. Franklin	8/18/2016 9:47:59 AM
11129874	Victor P. Collins	8/11/2016 3:20:35 PM
11129873	Danny J. Anderson	8/11/2016 3:19:22 PM
11136085	Tucker P. Bailey, IV	8/11/2016 3:14:40 PM
11136084	Lew C. Bloom	8/11/2016 3:03:27 PM
11149645	Chuck B. Frost	8/11/2016 2:56:14 PM
11129871	Joe W. Bailey	8/11/2016 2:52:10 PM
11138105	Joe A. Randall	8/11/2016 2:08:34 PM
11149647	Stu Johnson	8/11/2016 1:57:31 PM

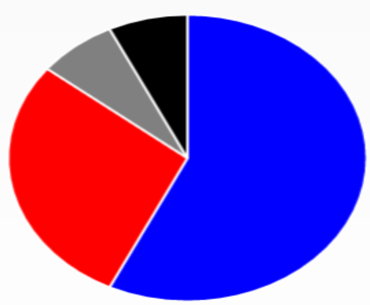
1.4 CURRENT DUES STATISTICS

Current Dues Statistics displays the statistics for paid, unpaid, and exempt members. Each option in the list is a clicable link that will display the names associates with each category. The pie chart provides a visual image of the statistics.

Current Dues Statistics

Accurate As Of: 8/23/2016 5:00:57 AM

	Count	% of Total	Orient Wide Avg.	Jurisdiction Wide Avg.
Active Members with Dues Paid in Full:	0	0%	1.4%	1.7%
Active Members with Current Dues Balance:	8	57.1%	39.7%	58%
Active Members with Arrears Dues Balance:	4	28.6%	24.9%	13.4%
Active Members that are Dues Exempt (A,L,R):	1	7.1%	0.1%	8%
Active Paid Life Members (E):	1	7.1%	34%	18.9%



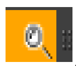
- Active paid in full
- Active with current balance
- Active with arrears balance
- Active dues exempt
- Active life members

CHAPTER 2: THE SENTINEL MENU BAR

The Sentinel **Menu Bar** displays at the top of the Sentinel window. The menu options vary depending on the type of user account that you have. Sentinel Valley Administrators will see the “Admin” tab while all other permission level users will not.

Clicking the house icon  will always return you to the **Welcome to Sentinel** page. The remaining menu options will be explained in the following sections.

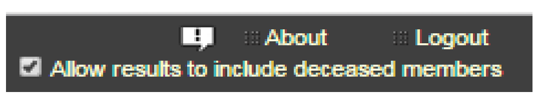
2.1 THE HOURGLASS SEARCH (LOLLIPOP)

The Hourglass icon , commonly referred to as the “Lollipop,” is your member quick search function. This search will return results quickly, but it is not intended as a means to create reports. For reports you will need to use **Search Members** which is located under the **Members** tab.

To perform a ‘Lollipop” search, click the Lollipop to open the search box and type in a name or member number. For this example, the user has typed in the name “Tucker,” and Sentinel has returned all members, active or inactive, who have “Tucker” in their name. Click on the desired name to view the member’s complete record.

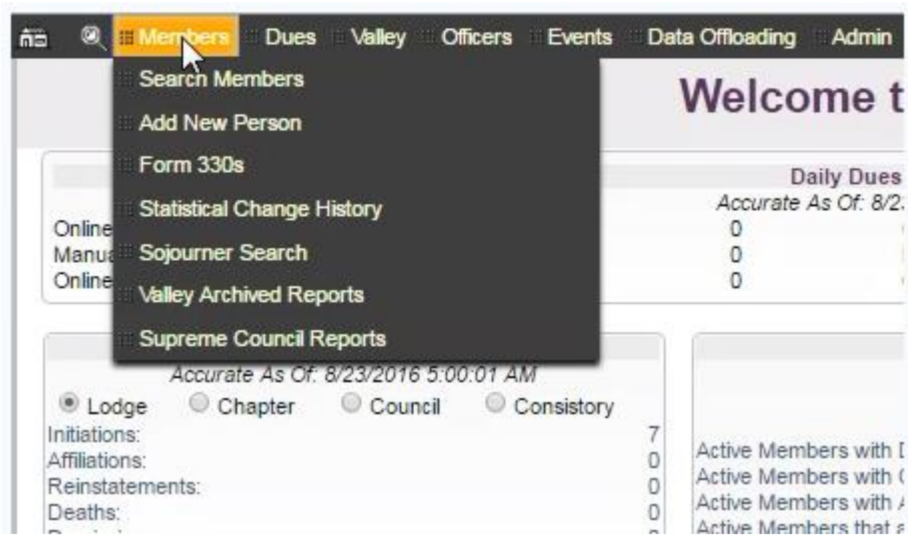
The Lollipop search returns results for both active and inactive members with the exception of deceased members. If you want deceased members returned in a search, check the box on the upper right side of the screen that says, “Allow results to include deceased members.

The Lollipop search responds to keystrokes. It will not function correctly when a number or name is pasted into it.



CHAPTER 3: THE MEMBERS TAB

Click the **Members** tab to display the menu.



The following sections will explain the **Members** tab menu options in detail.

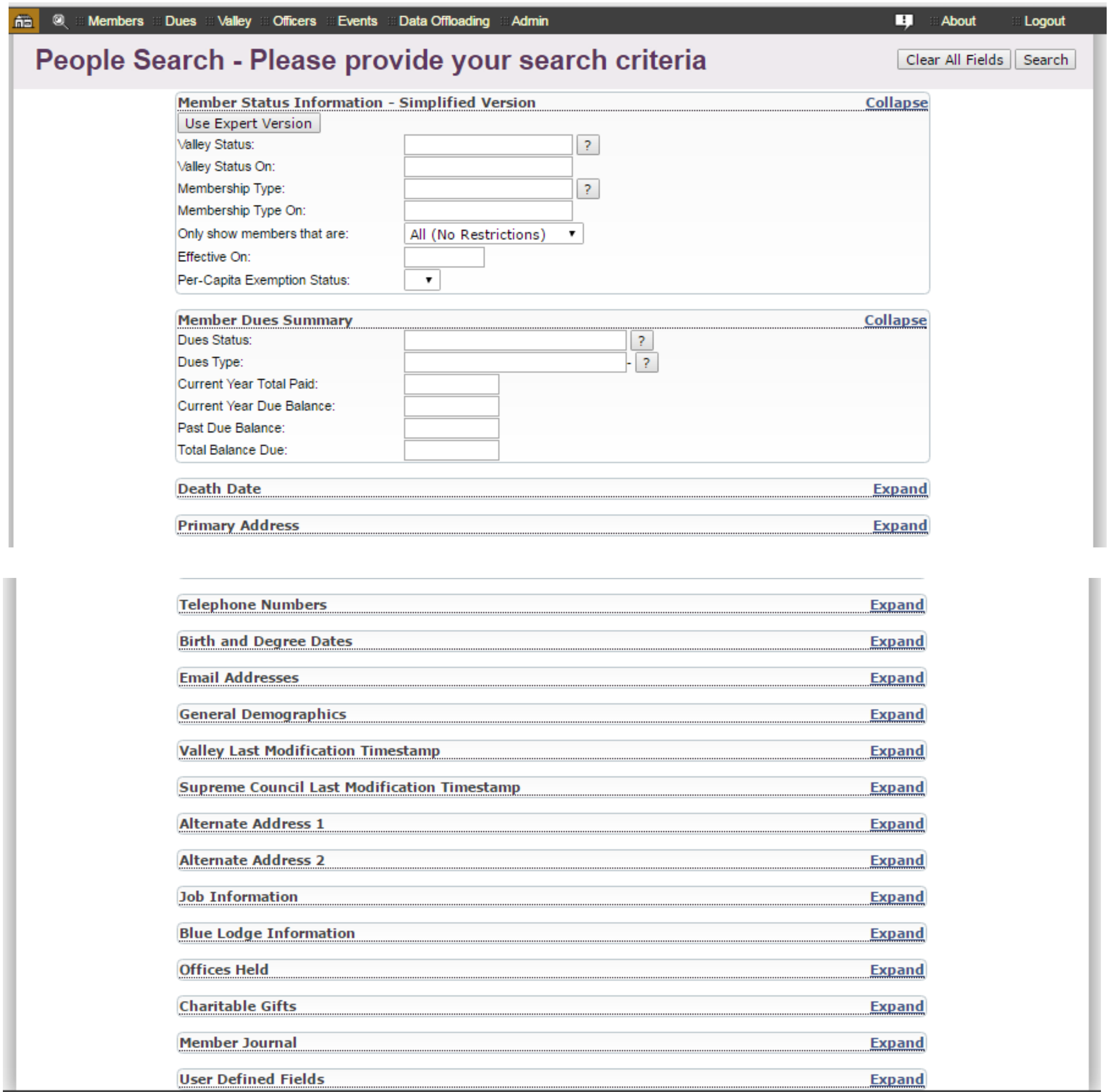
3.1 SEARCH MEMBERS (SIMPLE VERSION)

Search Members is located on the **Members** tab on the main Sentinel menu. Sentinel provides two types of searches: **Simple Search** and **Expert Search**. Most of the time you will be performing a simple search and we will cover these types of searches in this section. We will cover the Expert Search in the following section.

Follow these instructions to perform a **Simple Search**.

1. Click on **Search Members** to Display the submenu.

2. Click on **New Ad-Hoc Search** to display the search screen.

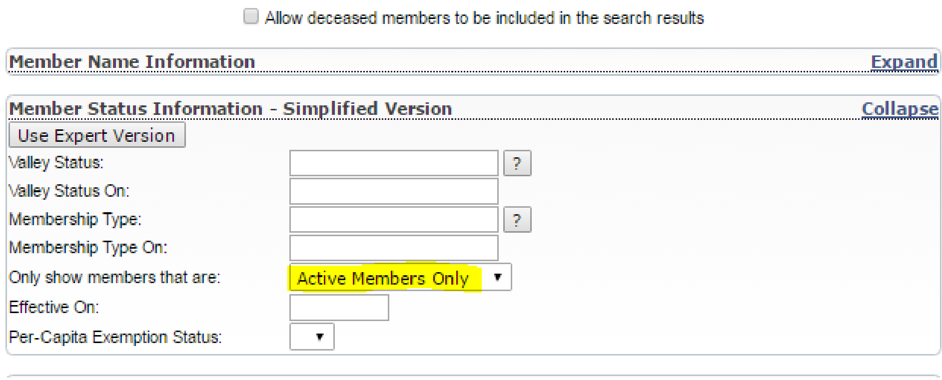


This is your all-purpose **Simple Search** screen. Notice that you can expand and collapse the various search categories. The top two are the most used, so they are designed to remain open by default, but you can manually collapse them.

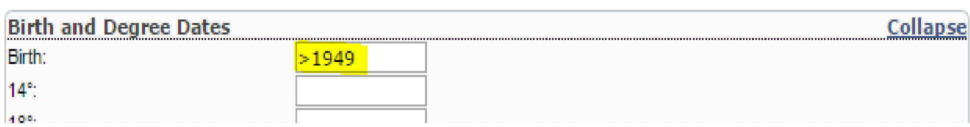
Take a look around the search screen. Expand and collapse the different categories to get a feel for the way it works and to familiarize yourself with the many search options. Every field on the s screen is searchable, and you can combine searches among as many categories as you need.

Say for instance that you wanted to email all of your active members who were born between 1950 and the present date, you would set up your search this way:

1. Under **Member Status Information - Simplified Version,** set **"**only show members that are" to "Active Members Only." You can collapse the top category, **Member Name Information**, because it is not needed for this search.

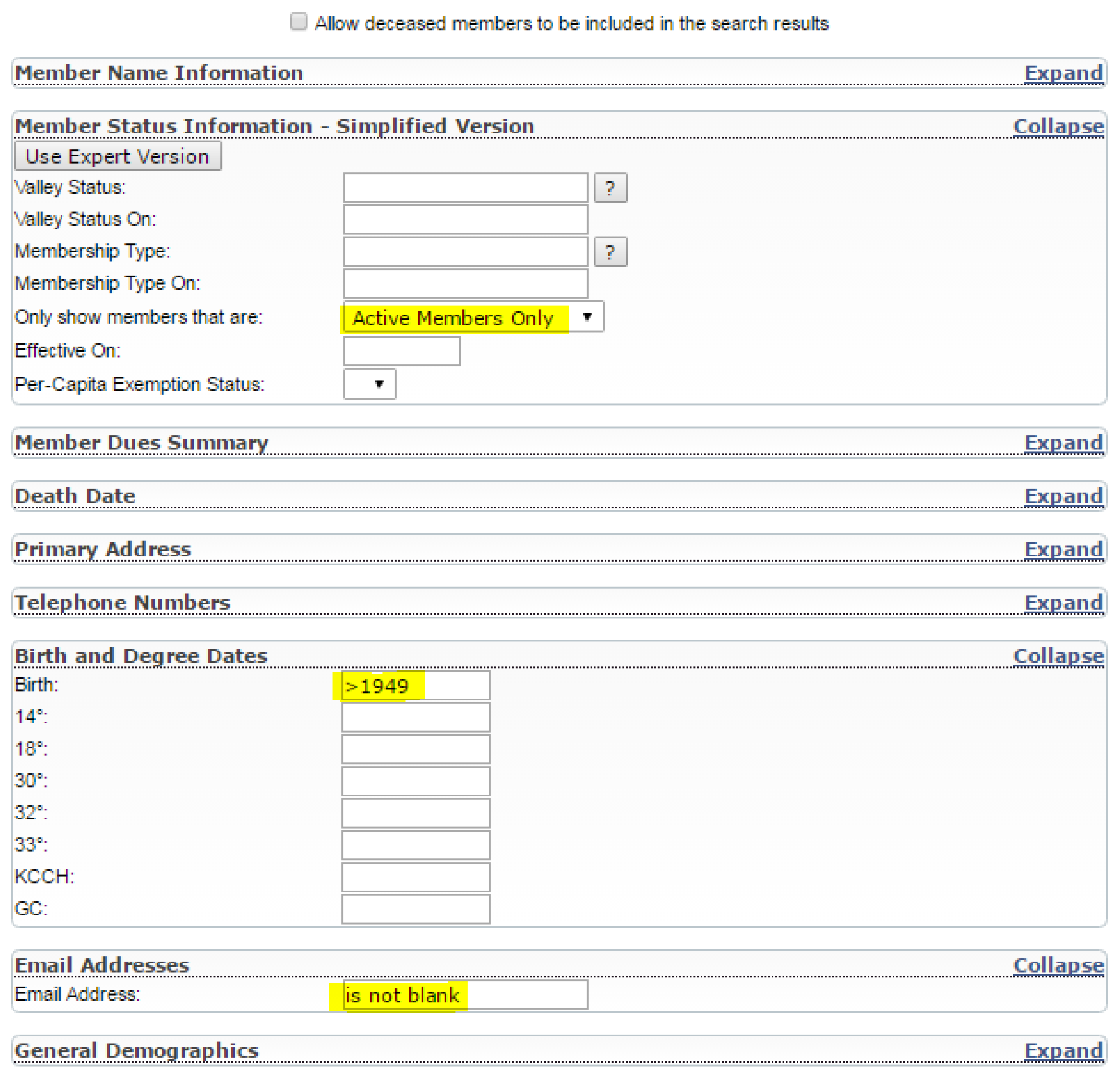


2. Under the **Birth and Degree Dates category**, use the > symbol to tell the system to locate all members who were born from 1950 to the present date. The correct syntax is **>1949.** You can also perform the same search by entering a date range as in 01/01/1950-MM/DD/YYYY where you would fill in the appropriate end date. However, >1949 is much easier.

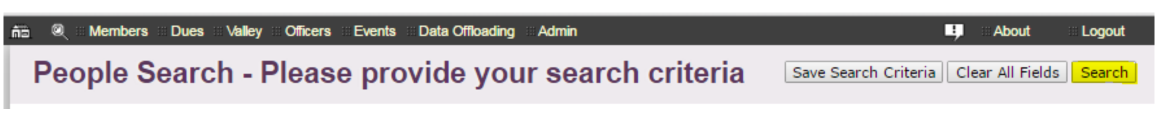


3. In the **Email Address** category, type "is not blank" in the email search field. "is not blank" tells Sentinel to look for members who have an email address in their record.

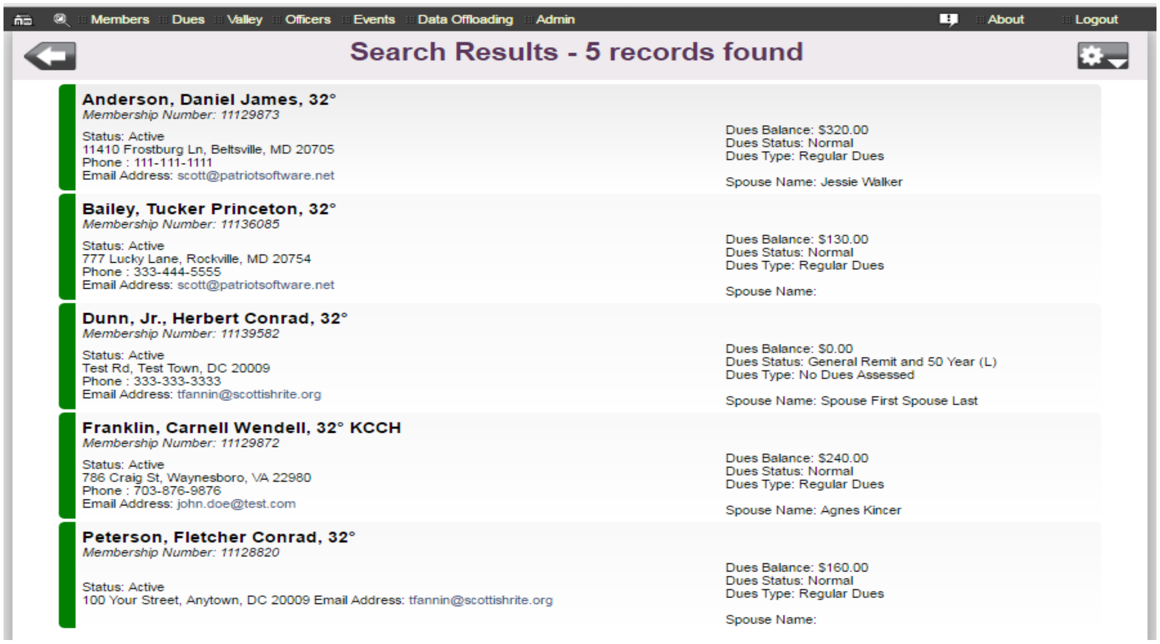
Your completed search should have the following criteria entered. Notice how we have selected from multiple categories.



4. To display your results, click the **Search** button in the upper right corner of the screen.



Your search results screen will display in the following format.



From this results screen you can click on a name to view that member's details and scroll back and forth among the entire list of member records included in the results. You can also email all of your members, or create a report. For specific instructions, see Sections 3.2A – 3.2D.

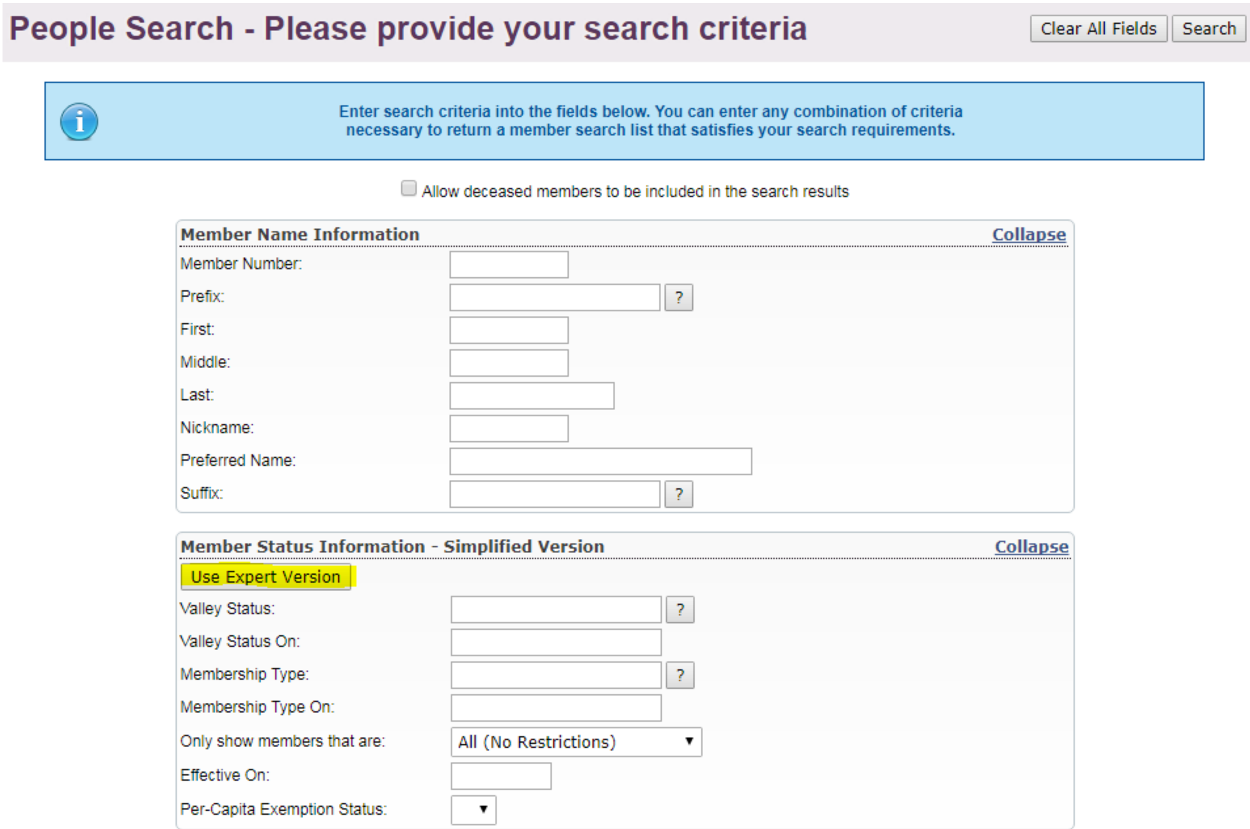
3.2 SEARCH MEMBERS (EXPERT SEARCH)

In the previous section we covered Simple Searches. This section will cover **Expert Searches**. Think of an Expert Search as an "advanced" search. With an Expert Search, the user may define a search in more detail. The primary purpose of the Expert Search is to locate members with a specific member status such as suspended, demitted, reinstated, and so forth.

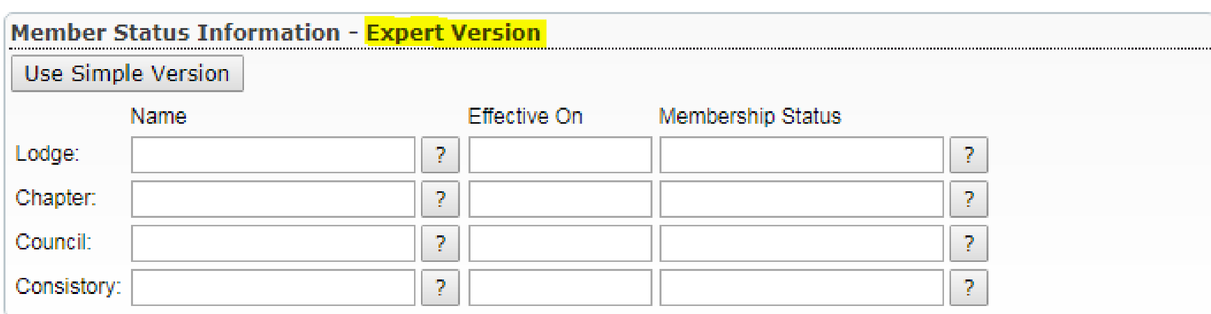
Follow these instructions to perform a **Simple Search**.

1. Click on **Search Members** to Display the submenu. When the submenu opens, click **New Ad-Hoc Search.**

2. On the People Search page, click the **Use Expert Version** button.



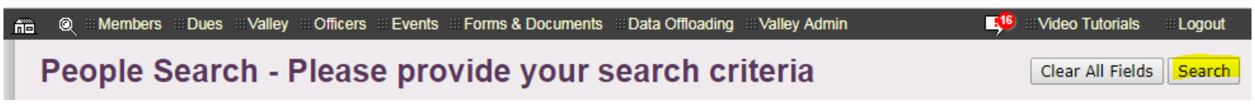
3. The People Search page will refresh and load the an **Expert Search** set of fields. These fields represent the Lodge, Chapter Council and Consistory. You may search using these fields alone, or combine these fields with any other fields on the search page.



4. For this example, we will search for all members in our Test Valley who have been suspended for non-payment of dues between 1/1/2017 and 12/31/2017 in at least the Lodge of Perfection.

5. Enter your Valley's name as the **Lodge** or clickt he question mark (?) to select it from a list of Valleys. Next, enter 1/1/2017-12/31/2017 in the **Effective On** field, and click the question mark (?) next to **Membership Status** and highlight "Suspension NPD (J)" and click the **Done** button. Your completed search criteria should resemble the following:

6. To run your query, click the **Search** button in the upper right corner of the page.



7. Your search results display.

From the results screen, you can click on a name to view that member's details and scroll back and forth among the entire list of member records included in the results. You can also email all of your members or create a report. See the following sections for specific instructions.

3.2A SCROLLING THROUGH RECORDS

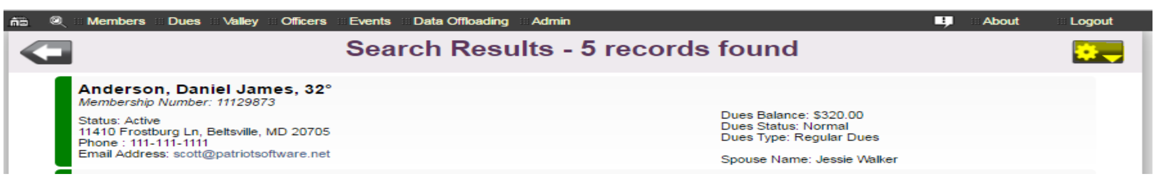
Click on the first name in your list to display his member record. To go to the next record, use the backward and forward arrows located at upper right corner of the screen.

There were five results in my search, so Sentinel will display "1 of 5" or "2 of 5" and so forth depending on which record is displayed on the screen.

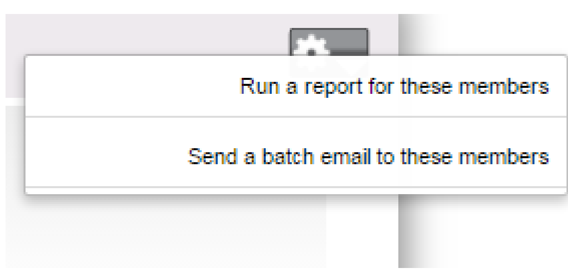
3.2B EMAILING A GROUP OF MEMBERS

Once you perform a search and have your search results displayed on the screen, you can send each member an email from within Sentinel.

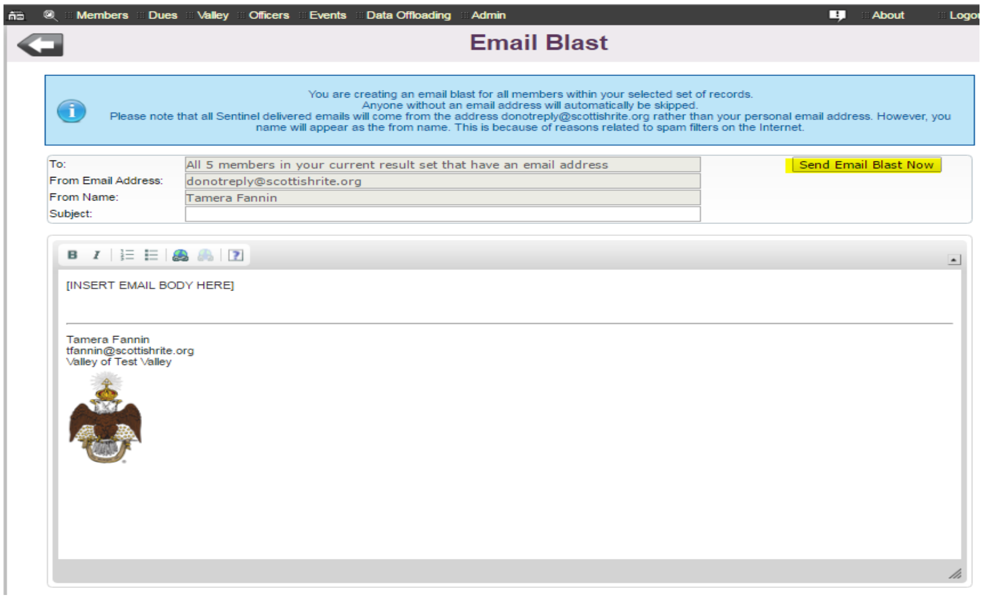
1. Click the gear in the upper right corner to open the menu.



3. Click the option to **Send a batch email to these members**.



4. The email form will open with the name and email address that is recorded in your Sentinel user account. Fill in the body of the message and click **Send Email Blast Now.**

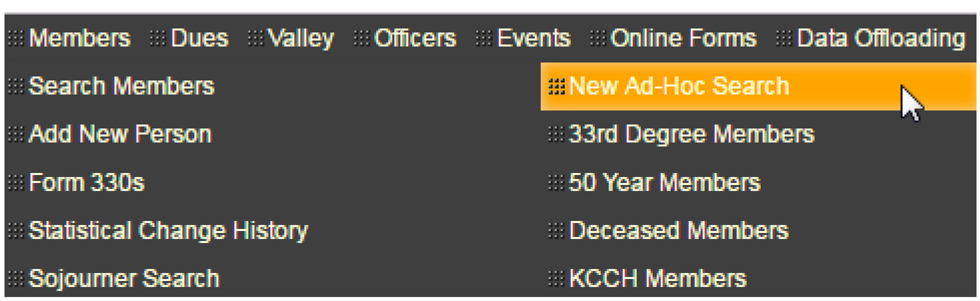


3.2C SAVING A SEARCH

Once you have completed your search, you can save the search criteria so that it can be used again in the future. This comes in handy if you have a search that you perform on a regular basis. It is important to point out that Sentinel does not save the results (names on the list) of the search; the system saves the criteria that you entered to arrive at the results.

Let's see how this works. For example, we want to create a list of all 33° members who are unpaid, and we want to run the report each week.

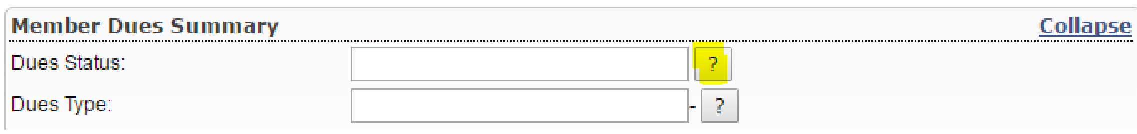
1. First, enter the search criteria by creating a **New Ad-Hoc Search**. **The New Ad-Hoc Search** link is located on the **Members>Search Members** submenu.



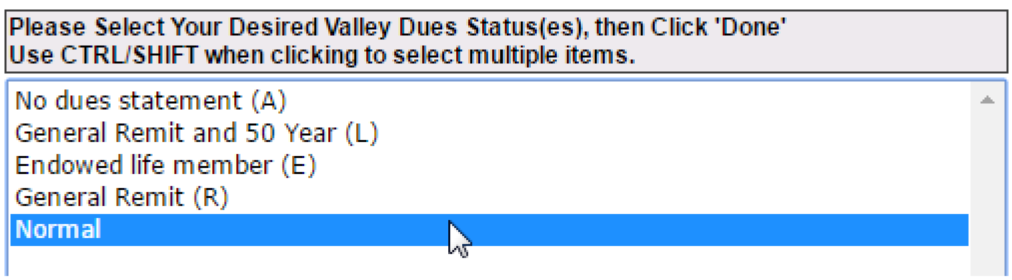
2. Click New Ad-Hoc Search to open the search screen. Under Member Status Information, select Active Members Only from the dropdown list.

3. Open **Member Dues Summary** by clicking the **Expand** button.

4. We are looking for dues-paying members (Dues status Normal), so click the question mark to display the menu.



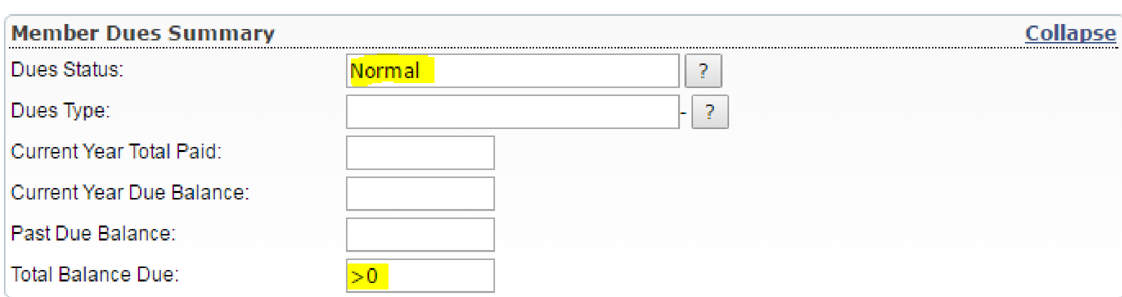
Select "**Normal** " from the list.



5. Click the **Done** button.

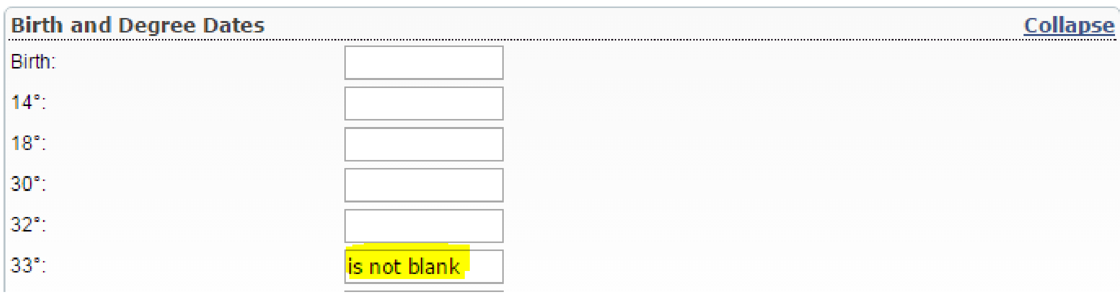
6. We are looking for 33° members who have a balance due of greater than zero, so enter >0 **in the Total Balance Due** field.

   Your **Member Dues Summary** search should look like this:

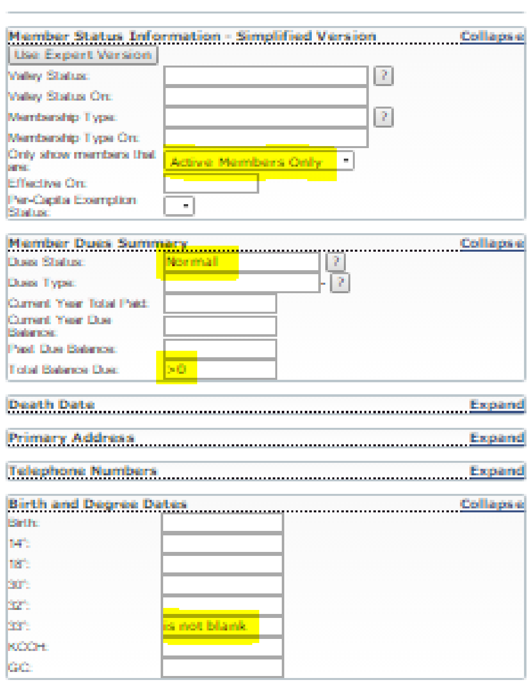


7. Next, tell the system that you want to search for 33^3 members only. Open **Birth and Degree Dates** by clicking the Expand button.

8. Type "is not blank" in 33° field. Every 33° member has a Degree date in this field. By typing, "is not blank," you are telling the system to look for any member records that has a date in this field.

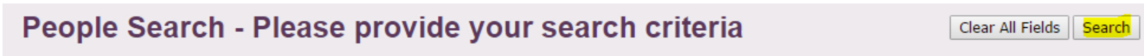


9. All of the search criteria are entered. Let's review. We want all active members who are 33°, normal dues-paying members with a balance due of greater than zero.



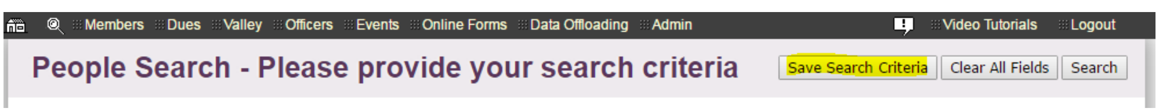
10. This is the tricky and confusing part. You will need to run the search before you can save it.

Click the **Search** button.



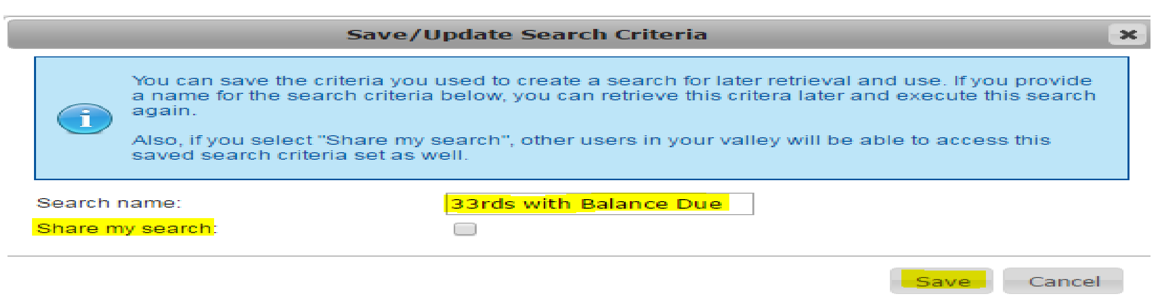
After the results display on the screen, click the **Back** button.

11. Now you have the Save Search Criteria button at the top of the screen. To save the above search criteria for future use, click the **Save Search Criteria** button at the top of the screen.

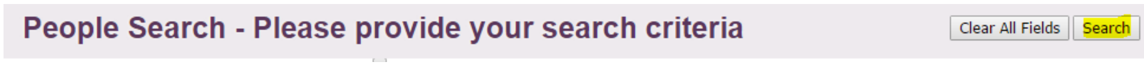


12. The Save Search window opens. Give your search a name. If you want to allow other Sentinel users in your Valley to use your saved search, click the **Share my search** checkbox. The search will then appear on their **New Ad-Hoc Search** menu.

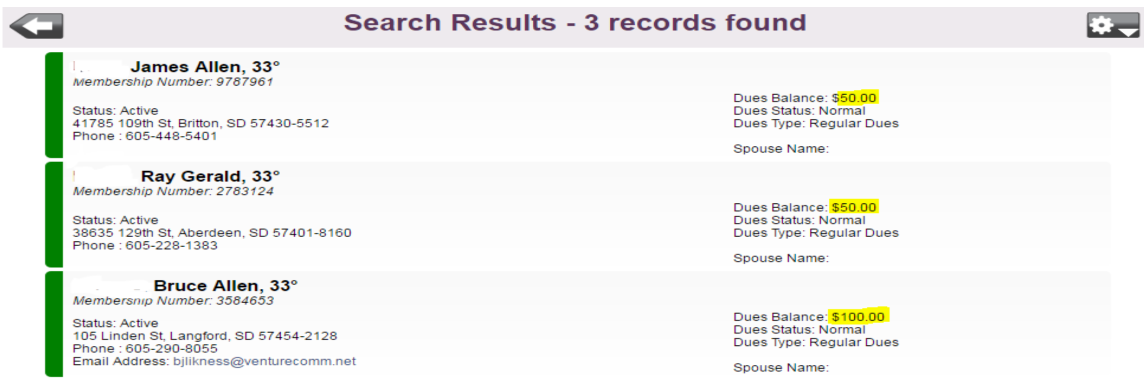
Click the **Save** button.



13. Your search is saved and you are returned to the original search. Click the **Search** button at the top right of the screen.

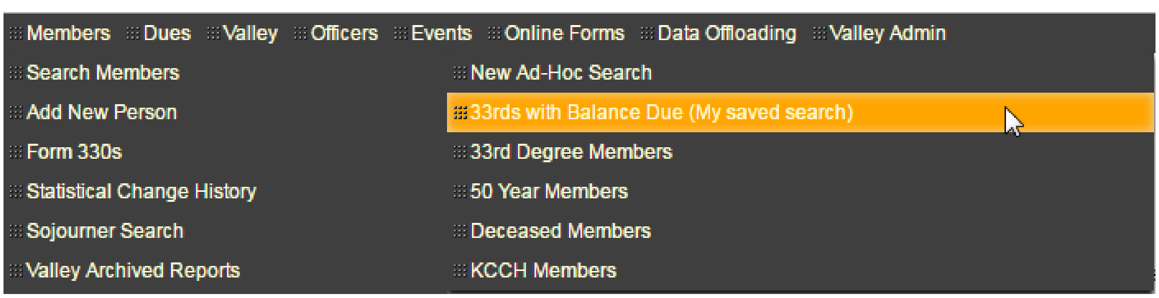


14. Sentinel displays the result list:



Notice that they are all active 33° with a balance due. (Last names have been purposefully removed)

15. Now, it is a week later, and you want to see if any of them have paid their dues during the past week. You do not have to setup the search all over again. Sentinel has stored the search on the **New Ad-Hoc Search** menu. If you did not share the search, only you have this option on the menu. If you shared the search, all users in your Valley will see it on their menu.



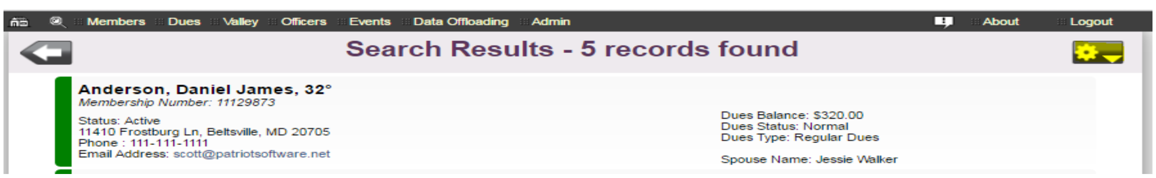
16. Simply click on **33rds with Balance Due** to run the search. The usual search window will open with all your search criteria already filled in. If you want to edit the search criteria, click the **Update Saved Criteria** button; otherwise, click the **Search** button.

17. One week later, there are now only two unpaid 33° members.

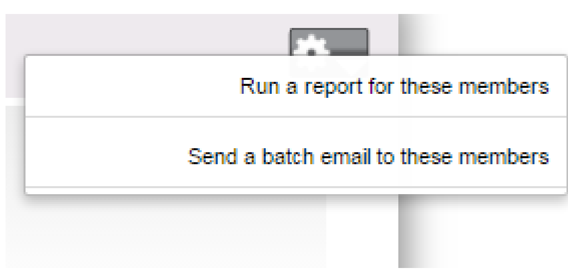
3.2D CREATING A REPORT BASED ON SEARCH RESULTS

Once you have completed your search, and the search results are displayed on the screen, you can create several different types of reports.

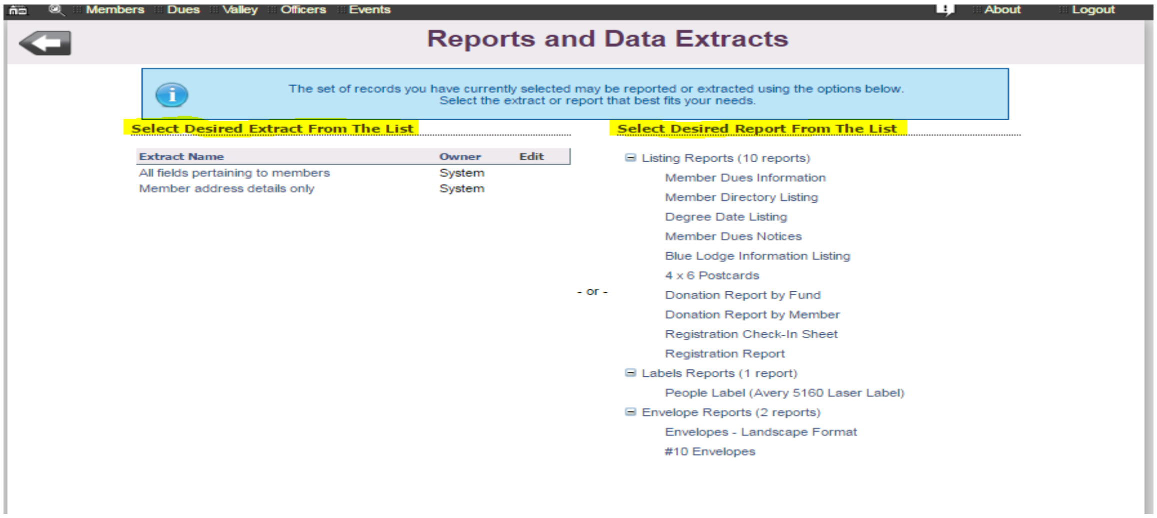
1. On the **Search Results** screen, click the gear in the upper right corner of the Sentinel screen.



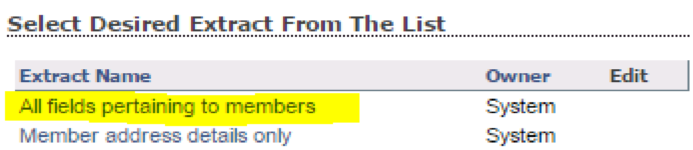
2. Click the option to **Run a report for these members**.



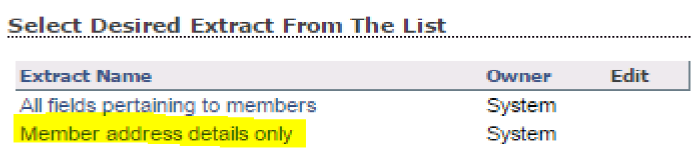
3. The Reports and Data Extracts screen will open.



The extract menu is displayed in the left column and the predefined reports are displayed in the right column. You have two options under **Select Desired Extract from the List**: **All fields pertaining to members** and **Member address details only**. Clicking on either of these options will open a screen to display a list of information which will allow you to build your own report by selecting the information topics that you want presented in your report. **All fields pertaining to members** is a long list which provides every field option in sentinel.



Member address details only is a short list to be used if you only need member names and addresses. This search allows you to extract this information without selecting from a long list.



In the right column on the Reports and Extracts screen you are given a list of predefined reports from which to make a selection. You do not have to build these reports; Sentinel has created them for you. Make you selection by clicking on the report name.

Select Desired Report From The List

- Listing Reports (10 reports)
  - Member Dues Information
  - Member Directory Listing
  - Degree Date Listing
  - Member Dues Notices
  - Blue Lodge Information Listing
  - 4 x 6 Postcards
  - Donation Report by Fund
  - Donation Report by Member
  - Registration Check-In Sheet
  - Registration Report
- Labels Reports (1 report)
  - People Label (Avery 5160 Laser Label)
- Envelope Reports (2 reports)
  - Envelopes - Landscape Format
  - #10 Envelopes

3.3 LABELS AND ENVELOPES

Sentinel provides the user with a feature to create Avery 5160 labels and #10 envelopes. Labels and envelopes may be created for a single address or for multiple addresses. The following sections provide instructions for both methods.

3.3A LABELS AND ENVELOPES (SINGLE)

The instructions for creating labels and envelopes are the same. You may create a single address label or single envelope on the **Profile** page of any member or non-member record in Sentinel. Use your method of choice (Hourglass search or Ad-Hoc search) to display the record for which you want to create a label or envelope , then follow these steps:

1. On the member or non-member's Profile page, click the envelope icon to the right of the preferred mailing address (highlighted in yellow on the following page).

2. When the menu opens, click on **Print single envelope** or **Print single mailing label.** If you are using Google Chrome, the document will appear in the lower left corner of your computer screen. If you are using another browser, check your browser instructions for how to retrieve your document as browser download methods differ.

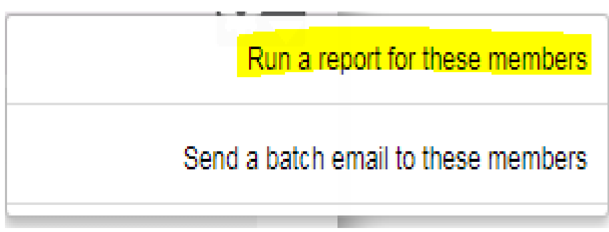
3.3B LABELS AND ENVELOPES (MULTIPLE)

To create multiple labels you must first perform a search for the addresses for which you want to print labels. If you are unfamiliar with performing searches, see the **Search Members** section of this Chapter. Once you have the group of names and address for you labels displayed on your computer screen, follow these steps:

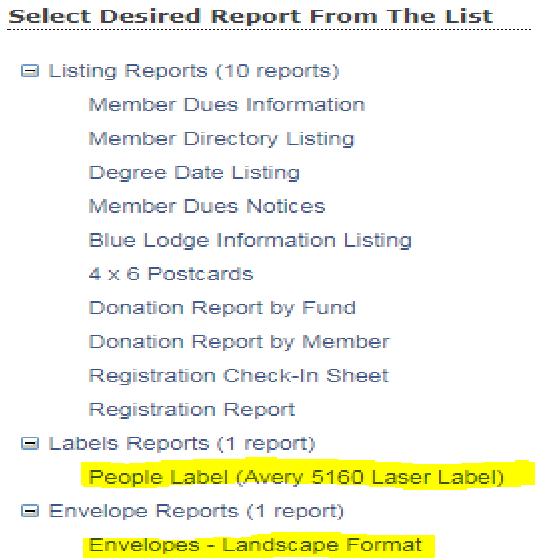
1. For this example, we have performed a search for all active members in our Test Valley, and we want to create labels and/or envelopes for them.

With the results of your search displayed on the screen, click the **gear icon** in the upper right corner.

2. When the report menu opens, click on **Run a report for these members**.



3. The **Reports and Data Extracts** page will open. Under **Select Desired Report From the List**, click either **People Label (Avery 5160 Laser Label)** or **Envelopes (Landscape Format)**.



4. If you chose envelopes, skip to #5. If you chose People Labels, you have the option of choosing the format type, label order, and number of blank labels to skip. We suggest that you leave the output format set to **Adobe Acrobat File.**

   You may order your labels by Alphabetical or zip code order by clicking the downward arrow and highlighting your choice.

   If you are printing labels on a partially used sheet of labels, you may specify the number of blank labels to skip. For example, Avery 5160 labels are three across. If the first five labels on the sheet have already been used, you may tell Sentinel to skip the first five labels reading left to right and begin printing on the sixth label.

   Click **Run Report Now**.

If you are using Google Chrome, the label document will appear in the lower left corner of your computer screen. If you are using another browser, check your browser instructions for how to retrieve your document as bowser download methods differ.

Your labels are ready to print.

Danny J. Anderson 11410 Frostburg Ln Beltsville, MD 20705	Joseph S. Carlyle 10410 Gilmore Ave Rockville, MD 20795-3928	Herb C. Dunn, Jr. Test Rd Test Town, DC 20009
Herb G. Einstein 201 Plutonium Way Baltimore, MD 29564	Kenny J. Fletcher 8708 10th Avenue Hoboken, FL 20910-3521	Carnell W. Franklin 786 Craig St Waynesboro, VA 22980
Stu Johnson 100 Main St Anytown, IN 44112	Fletcher C. Peterson 100 Your Street Anytown, DC 20009	Joe A. Randall 100 Main st Anytown, IN 55555
Scotty T. Rite 1733 16th St NW Washington, DC 20009		

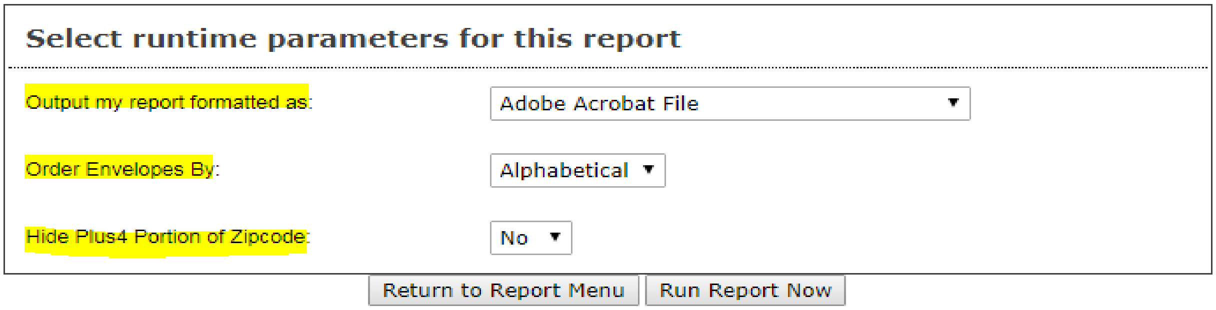
5. If you chose Envelopes in step #3, Sentinel gives you the option of choosing an output format: Order Envelopes By, and Hide Plus4 Portion of zip code.

   We suggest that you leave the **output format** set to Adobe Acrobat File.

   Choose to output your envelopes in Alphabetical or zip code order by clicking the downward arrow and highlighting your choice from the menu.

   If you do not want to print the plus 4 portion of the zip code on the envelopes, click the downward arrow and choose “No.” For some reason, folks wanted this option. It is up to you.

   Click **Run Report Now.**



If you are using Google Chrome, the label document will appear in the lower left corner of your computer screen. If you are using another browser, check your browser instructions for how to retrieve your document as browser download methods differ.

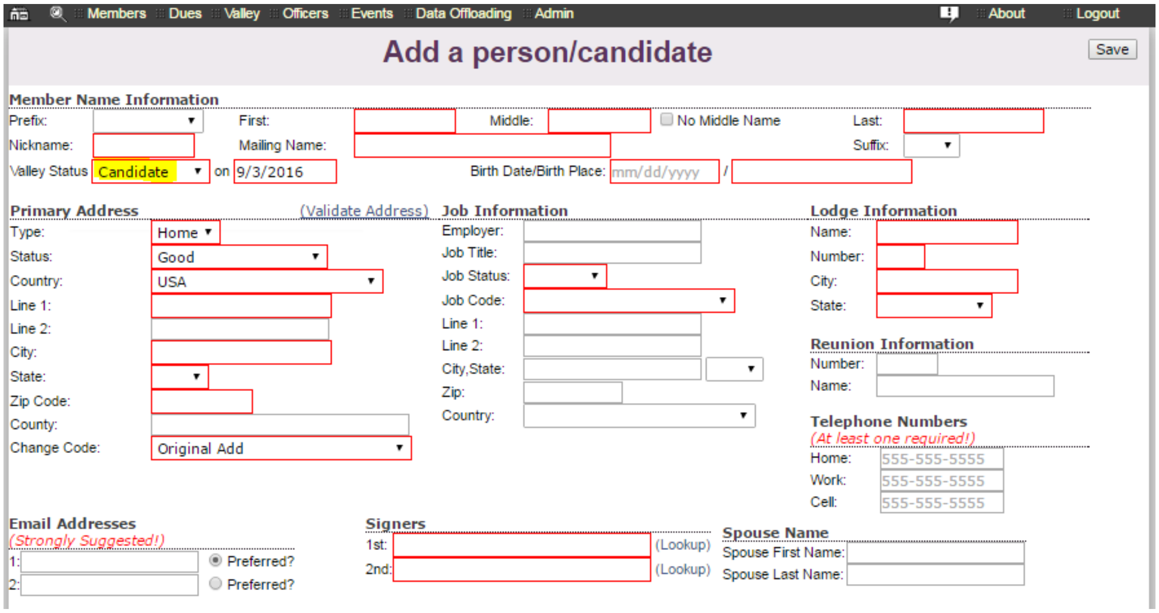
3.4 ADD NEW PERSON: ADD A NEW CANDIDATE FOR DEGREES

Add New Person is located on the Sentinel menu under **Members**. You will use this feature to add both initiation Candidates and nonmember records. An example of a nonmember record would be a Blue Lodge or a widow whom you want to add to your mailing list.

Adding a new Candidate is the first step in reporting your new members to the Supreme Council on a Form 330. Follow these instructions for adding a new Candidate for initiation.

1. Click **Members** on the black Sentinel menu bar and then click **Add New Person.**
2. The **Add New Person** screen will open. The **Valley Status** will always display "Candidate" as the default. When adding a new member, do not change this status or Sentinel will not recognize your new entry as a Candidate for initiation.

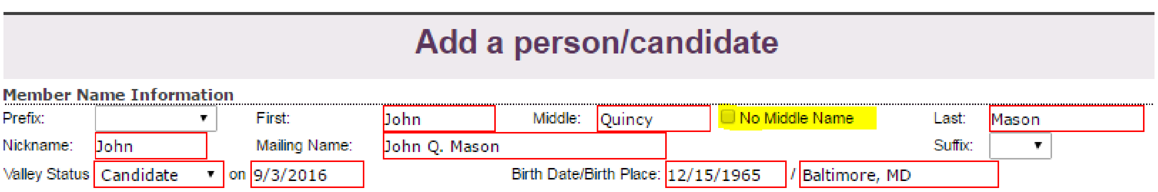
IMPORTANT! When adding an Initiate, do not change the Valley status from "Candidate."



When adding a new Candidate, the boxes outlined in red are the minimum required by the system. You must enter information in these boxes or you will not be able to save your entry. However, in addition to the red boxes, please always enter as much information about the member as you have available.

Follow these instructions to add your new Candidate:

1. Add the **Member Name Information.** The prefix is optional. If your member has a middle name, please enter it. Our database contains many thousands of records. Middle names help identify members with common names such as Smith, Jones, Johnson, and so forth.



If your member does not have a middle name, click the **no middle name** check box to turn off the restriction on the middle name.

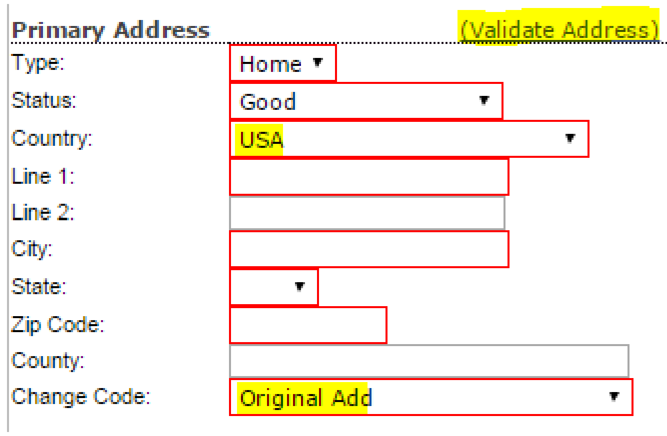
2. Leave the **Valley Status** set to **Candidate**. The "Candidate on" date is set by the system. This does not represent the date that he will take his Degrees; rather, it is the date on which you entered his record into the system as a Candidate.

Boxes on the Add Person/Candidate screen that are outlined in red identify information that is required by the system.

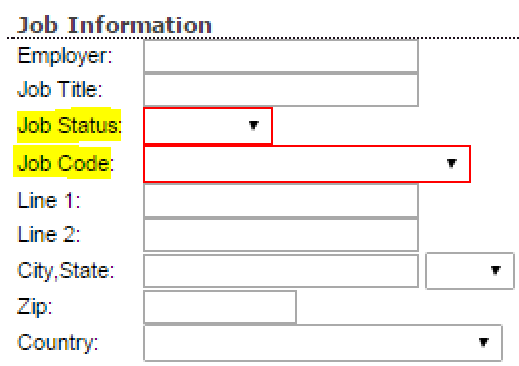
3. Next, enter the **Primary Address** information. The address **Type** will default to **Home**. You can click the downward area to open a **Type** menu to make another selection. The Country will default to USA. If you need to enter another country, click the downward arrow to the right of USA. It is important that you select the country before adding the address details as Sentinel's screen will change to show the required fields for foreign addresses. Fill in the remaining fields and leave the **Change Code** set to **Original Add**.

IMPORTANT! When adding a foreign address, always choose the country before entering the address details. This action will remove the "state" requirement.

4. You can use **Validate Address** to validate your entry with the United States Postal Service and also to add the 4-digit subzip if you do not already have it.

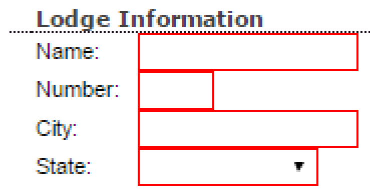


5. Enter the **Job Information.** The **Job Status** and **Job Code** are required. However, please enter as much information as you have available. To choose a **Job Status** and **Job Code**, click the downward arrow to open the menu The **Job Status** options are "Current, Former, Retired and Other." Make your selection by highlighting one of these four options. The **Job Code** options job descriptions such as "Banking" or "Education." Make your section by highlighting a job description in the list.

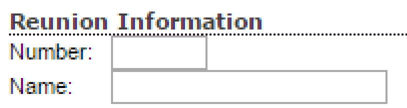


6. Enter the **Lodge Information**. All fields are required. To choose a state, click the downward arrow to display the list of states and US territories. Make your selection by highlighting a state.

If the Lodge is in a country other than the US, Choose N/A from the state list.



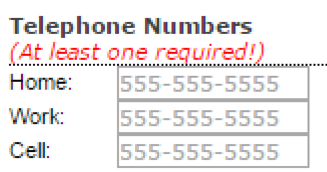
7. Enter the **Reunion Information**. This information is not required by the system, but please enter the Number and Name if they apply.



8. Enter the **Telephone Numbers**. Nowadays, many people only have a cell phone number, so all three fields are not required. Only one number is required by the system, and it does not matter which phone number you enter. However, if you have all three numbers, please add them.

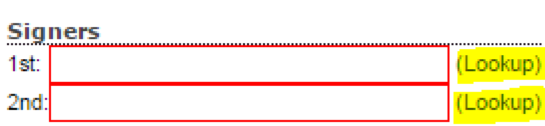
To accommodate foreign phone numbers, there is no formatting restriction in the phone boxes, but please use the format shown (555-555-5555) for domestic numbers. Use whatever format is appropriate for foreign numbers. Notice that the numbers displayed are grayed.

Click in the box and type over 555-555-5555.

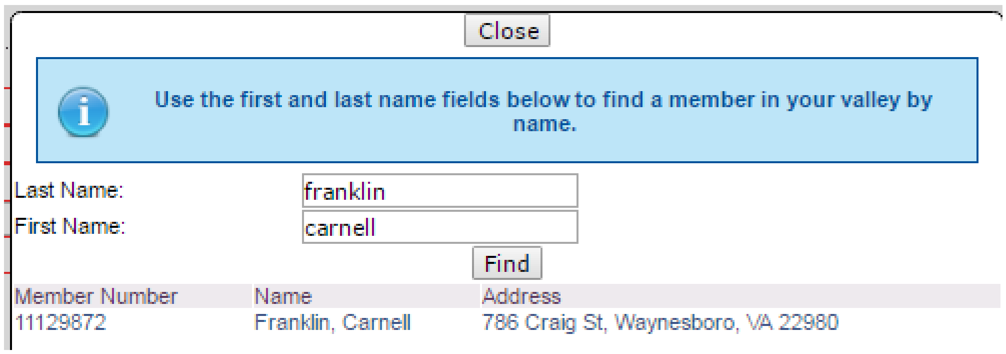


9. Enter the **Email Addresses**. Because some members do not have an email address, this information is not required, but as you can see below, it is "Strongly suggested" that you add available emails. If a member has more than one email, you can enter a second. Identify the most used email address by clicking radio button next to **Preferred**. It is better to enter the **Preferred** email address first.

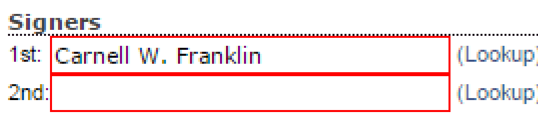
10. Enter the **Signers**. Do not type the signer's name directly into the box. Click on the **Lookup** link to open a search window. This is very important because this action links the new member's Sentinel record to his signers' records. This linked information is used when recognizing signers for awards.



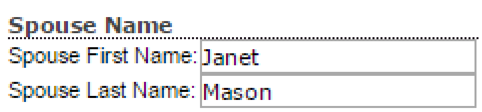
After you click **Lookup**, the search window will open. Enter the first and last name of the signer, and then click the **Find** button. Click the signers name to select it. If you are searching for a common name such as John Smith, you may have multiple results from which to select a name. Use the Member Number and Address to identify the correct signer.



When you click on the signer's name, Sentinel will automatically place his name in the Signer box. Follow the same instructions to add the 2nd Signer.

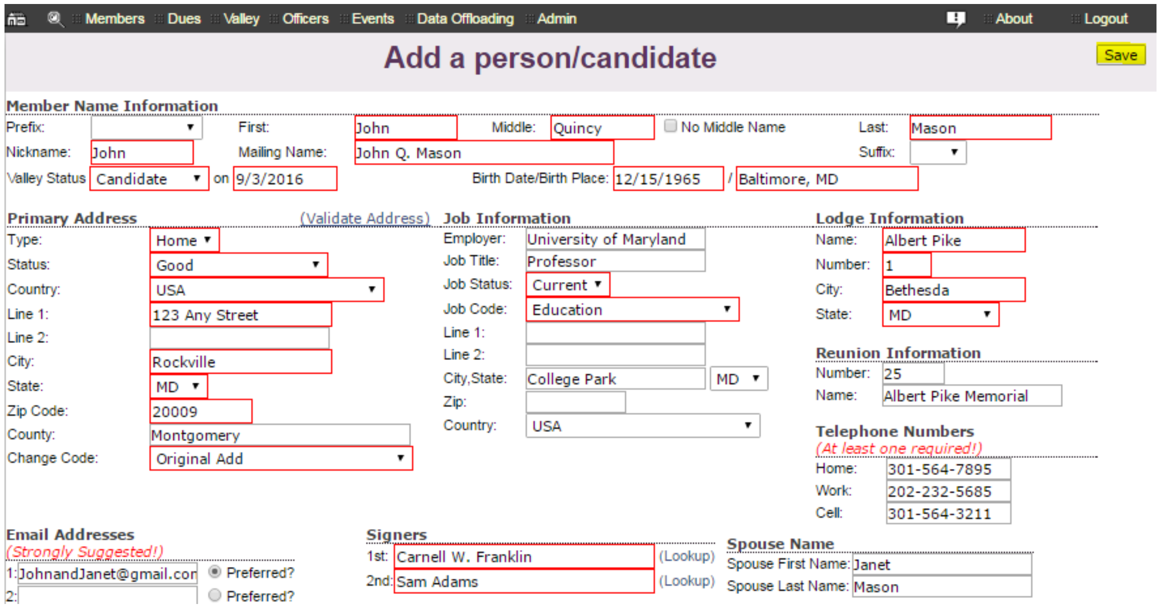


11. Add the **Spouse Name** (if applicable). Type the first and last name into the appropriate boxes.



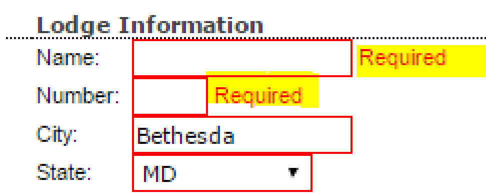
12. Now you are ready to save your new member addition. You entry should look similar to the figure below.

    Click the **Save** button in the upper right corner.

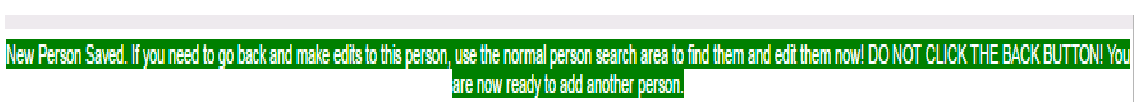


If you entered all of the appropriate information, Sentinel will display the following message at the top of the screen:

If you left out required information, Sentinel will not save your entry. You will see "Required" shown in red next to the missing information. Notice that the Blue Lodge Name and Number were not entered. The system displayed "Required" next to the boxes.



When you see "required", you will need to fill in this missing information and click **Save** again.



3.5 FORM 330: REPORT INITIATES TO THE SUPREME COUNCIL

You will report your Initiates to the Supreme Council on Form 330. The form is located on the **Members** menu.

Before you can complete your Form 330, follow the instructions on pages 17-21, **Add New Person**, to add all of the Initiates that you want to include on the form.

. There are two types of Form 330:

- **Form 330 for Initiates**. Use this form if you are reporting at least the Lodge Degree—that is, a member who has never taken any degrees before now.

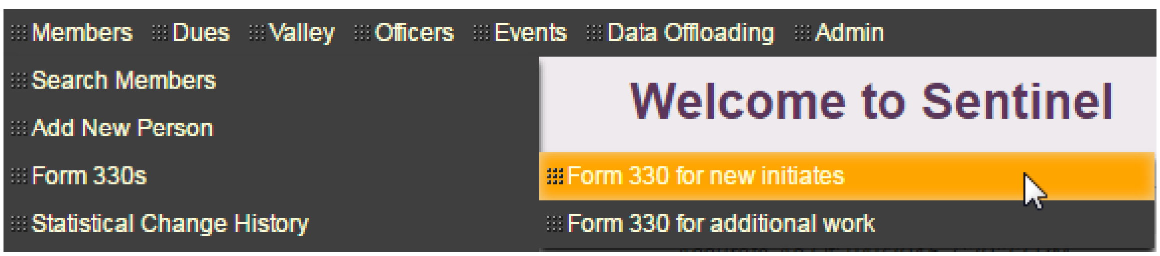
- **Form 330 for Additional Degrees**. Use this form if you are reporting members who have already taken at least the Lodge on a prior date and already have an existing Sentinel record. For instance, if a member received Degrees in the Lodge and Chapter in the Spring Class and is now taking the Chapter and Consistory in the Fall Class. Valleys that share members with other Valleys (split memberships) will use this form to report additional Degrees. In the past this had to be done manually on a paper Form 330.

The following sections will explain how to complete **the Form 330 for Initiates** and the **Form 330 for Additional Degrees** and submit the form along with your payment of fees to the Supreme Council, Office of the Grand Executive Director

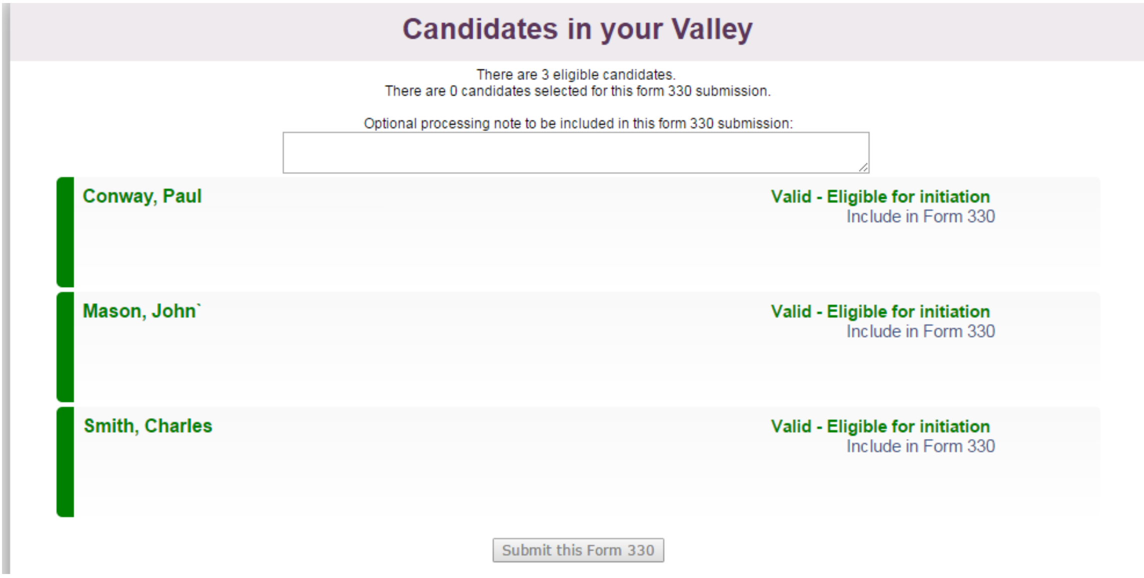
3.5A CREATING A FORM 330 FOR INITIATES

Use this form if you are reporting at least the Lodge Degree—that is, a member who has never taken any degrees before now.

1. Place your mouse pointer on **Members** on the Sentinel menu bar. On the dropdown menu, place your mouse pointer on **Form 330**. Slide your mouse pointer to the right and click on **Form 330 for Initiates**.

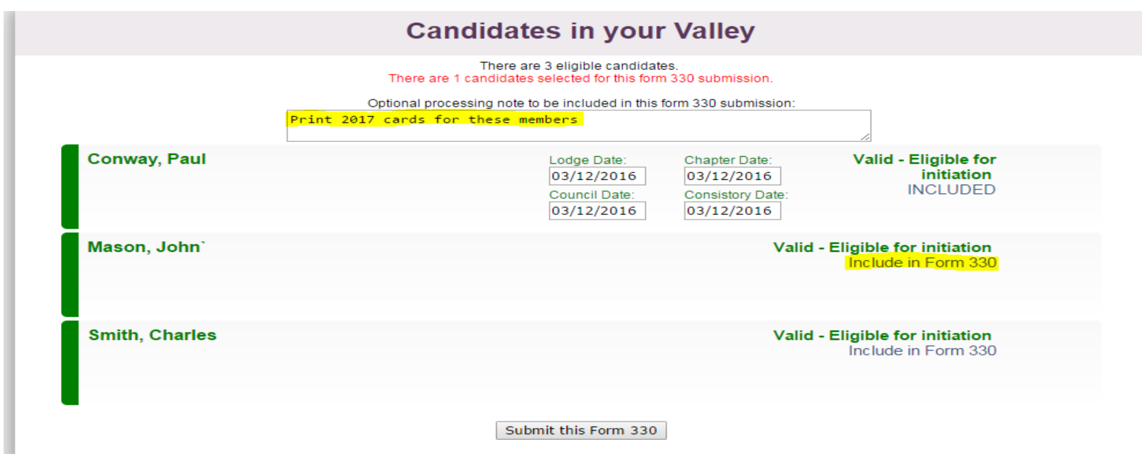


2. The **Candidates in Your Valley** page will display the members that you have added as Candidates. The word, "**Valid**" next to each entry shows that you have entered all of the required information so that each member can be added to the form. If any members are displaying as "**invalid**," that you want to include on your Form 330, you will need go to the member's record and enter the missing information before you can begin the Form 330.



3. At the top of the **Candidates in your Valley** window there is a box labeled, “Optional processing note to be included in this form 330 submission.” If you have a message that you want to bring to the attention of the Supreme Council staff, type the message in this box, and it will appear on your completed Form 330.

4. To add Initiates to the Form 330, click on **Include in Form 330** . The following window will open.



5. Enter the Degree dates as shown in the figure. Notice that we have added a note in the message box to “print 2017 cards for these members.”

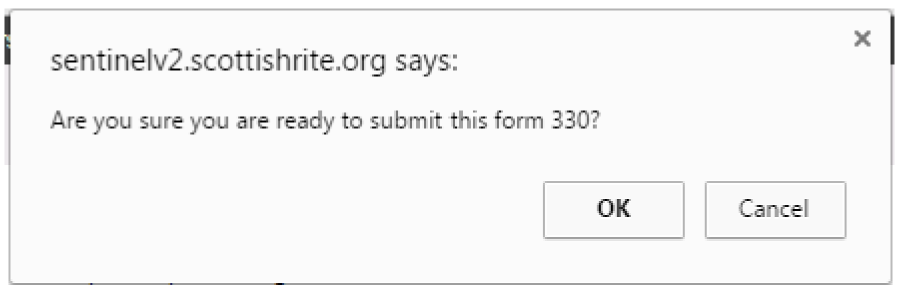
6. Paul Conway is now added to the Form 330 and is labeled “Included.” Next, add John Mason by clicking on Include in Form 330. The system will automatically enter the Degree dates in the Degree

boxes for John Mason. If you need to remove any of the dates or change the dates, click in the appropriate box/boxes and type in your date change. Continue adding members to the Form 330 in this manner. You do not have to enter all "Valid" members. Enter only those whom you want to include on your Form 330.

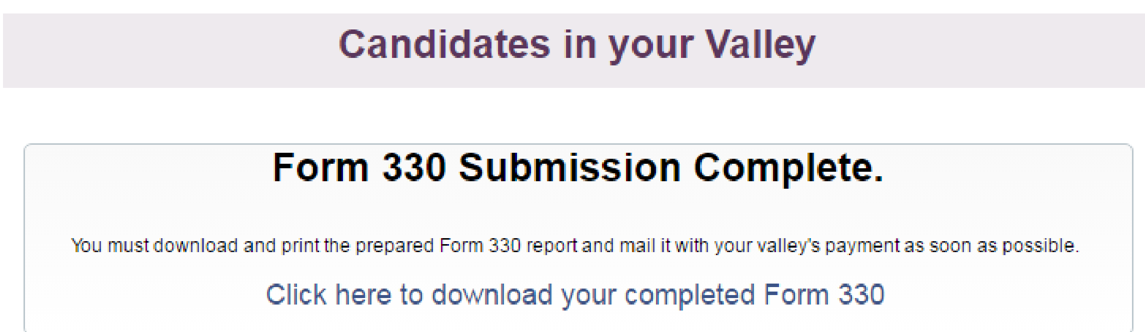
7. The sample completed page looks like the following:

8. When you are finished adding Initiates, click **Submit this Form 330**.

9. Click **OK** to continue.



10. Click the link to download your completed Form 330.



Here is the completed form:

9/9/2016 — Form 330 - Statement of Fees and Report of Investitures — Page 1 of 1

Valley of Test Valley in the Orient of US

	Lodge	Chapter	Council	Consistory	Fees
Paul Cecil Conway 11153192 567 Blair Road Albert Pike(1) Washington, DC Birth Date: 01/01/1900 Birth Place: Bethlehem, PA *Print 2017 cards for these members*	03/12/2016	03/12/2016	03/12/2016	03/12/2016	$31.00
John` Quincy Mason 11153191 123 Any Town Albert Pike(1) Washington, DC Birth Date: 01/01/1900 Birth Place: Baltimore, MD *Print 2017 cards for these members*	03/12/2016	03/12/2016	03/12/2016	03/12/2016	$31.00
Charles Franklin Smith 11153193 4567 Trace Way Albert Pike(1) Washington, DC Birth Date: 01/01/1900 Birth Place: Waco, TX *Print 2017 cards for these members*	03/12/2016	03/12/2016	03/12/2016	03/12/2016	$31.00

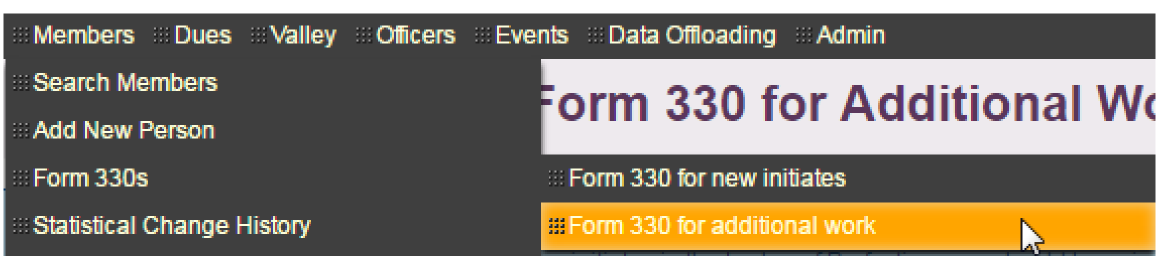
Total Fees Required for this Form 330: $93.00

3.5B CREATING A FORM 330 FOR ADDITIONAL WORK

Use this form if you are reporting members who have already taken at least the Lodge on a prior date and already have an existing Sentinel record.

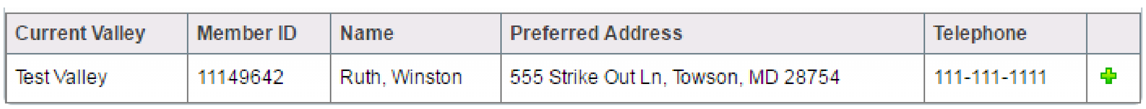
For this example we will use the membership record of Winston Morris Ruth who received the 14° and 18° on January 1, 2016. Now he has completed the 30° and 32°, and we want to report those Degrees using **Form 330 for Additional Work**.

1. Place your mouse pointer on **Members** on the Sentinel menu bar. On the dropdown menu, place your mouse pointer on **Form 330**. Slide your mouse pointer to the right and click on **Form 330 for Additional Work.**

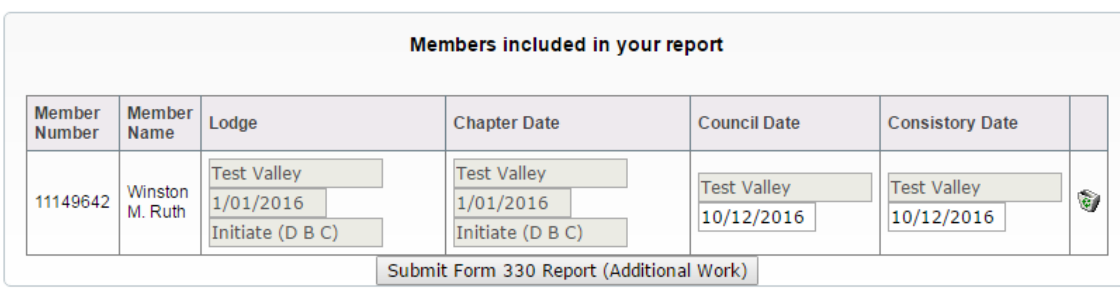


2. Enter his information in the form provided and click **Find Candidate**. For this example we are using "Test Valley." You will use your new member's actual Valley membership.

3. The Candidates name will appear on your screen. Click the green plus sign to select the name.

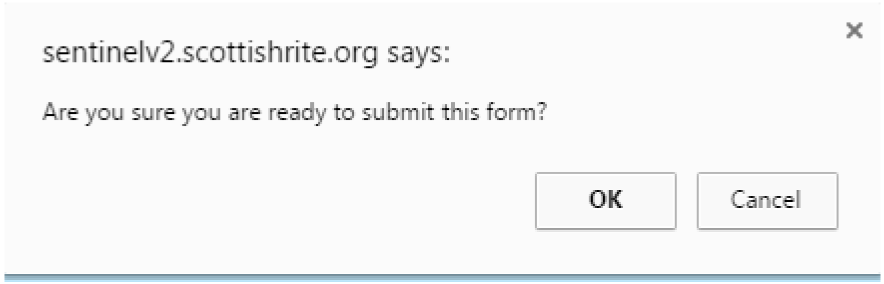


4. The Form 330 will open with the Lodge and Chapter dates already entered. Add the Council and Consistory dates.

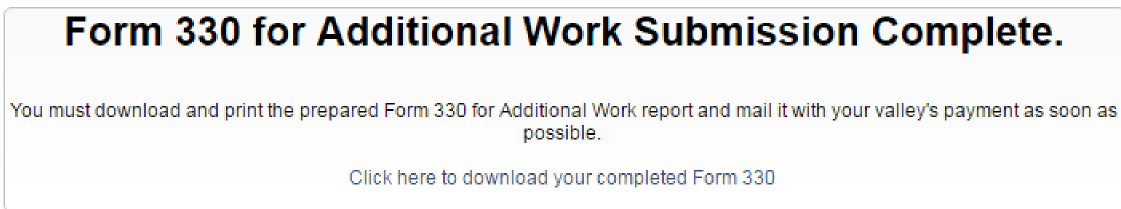


5. If you are ready to report this member on Form 330, click **Submit Form 330 Report (Additional Work).** If you made a mistake and do not want to report this member, click the trash can at the right of the screen.

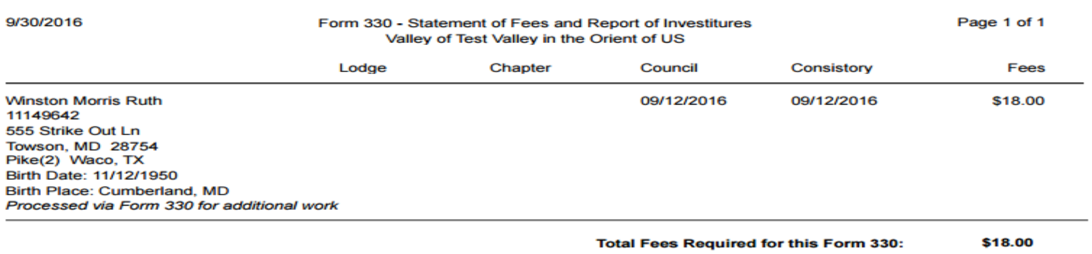
6. Sentinel will ask you if you are ready to submit the form. If yes, click **OK**.



7. View and print your report by clicking **Click here to download your completed Form 330**. Print and mail your Form 330 along with the appropriate fees to the Supreme Council, 33°.



The completed Form 330 for Additional Work:


9/30/2016 — Form 330 - Statement of Fees and Report of Investitures — Page 1 of 1
Valley of Test Valley in the Orient of US

	Lodge	Chapter	Council	Consistory	Fees
Winston Morris Ruth 11149642 555 Strike Out Ln Towson, MD 28754 Pike(2) Waco, TX Birth Date: 11/12/1950 Birth Place: Cumberland, MD *Processed via Form 330 for additional work*			09/12/2016	09/12/2016	$18.00

Total Fees Required for this Form 330: $18.00

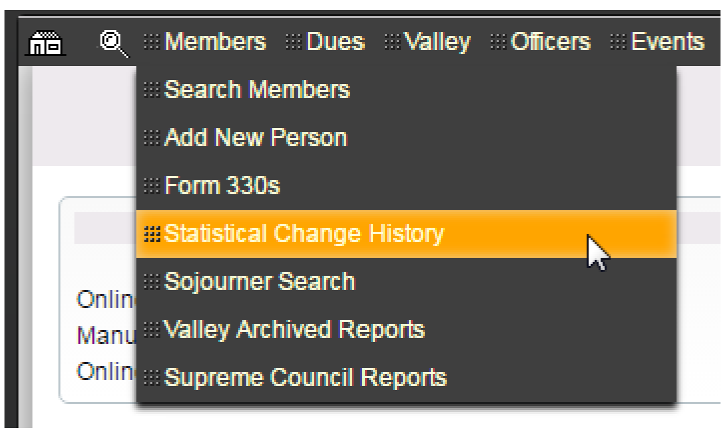
3.6 STATISTICAL CHANGE HISTORY

Statistical changes are defined as actions taken to change a member's current status, in particular, these are changes to reinstate, demit, suspend, or expel a member. You will perform a statistical change on the member's **Profile Screen.** Clicking the gear in the upper right corner of the Profile Screen opens the menu so that you can choose, "Request a statistical change for this member."

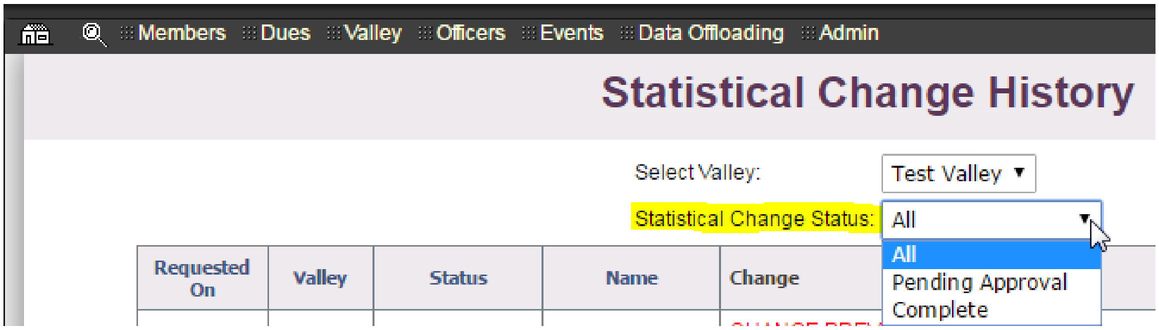
All statistical changes are reported electronically to the Computer Services staff of the Supreme Council where they are reviewed for accuracy and then applied to the member's record.

Once you request a statistical change, the change will appear under **Statistical Change History** so that you can keep track of changes that are "Pending" or "Completed." If a change is "Pending," this means that the Computer Services staff has not yet reviewed the change. If the change is "Completed," this means that the Computer Services staff has finalized the change and updated the member's record in Sentinel to the requested status change.

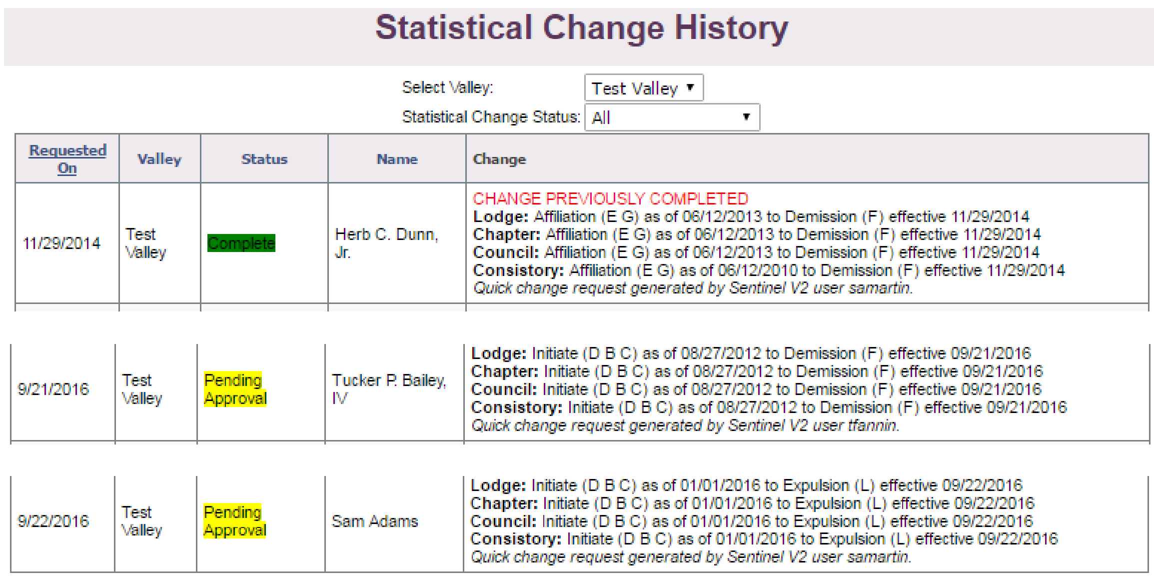
To view pending and completed status changes, click **Statistical Change History** on the **Members** Menu.



You have the option to view **All** changes, **Pending** changes, or **Complete** changes by making a selection on the **Statistical Change Status** dropdown menu.



Here is an example of a **Statistical Change History** screen showing both **Pending** and **Complete** status changes.



Requested On	Valley	Status	Name	Change
11/29/2014	Test Valley	Complete	Herb C. Dunn, Jr.	CHANGE PREVIOUSLY COMPLETED **Lodge:** Affiliation (E G) as of 06/12/2013 to Demission (F) effective 11/29/2014 **Chapter:** Affiliation (E G) as of 06/12/2013 to Demission (F) effective 11/29/2014 **Council:** Affiliation (E G) as of 06/12/2013 to Demission (F) effective 11/29/2014 **Consistory:** Affiliation (E G) as of 06/12/2010 to Demission (F) effective 11/29/2014 *Quick change request generated by Sentinel V2 user samartin.*
9/21/2016	Test Valley	Pending Approval	Tucker P. Bailey, IV	**Lodge:** Initiate (D B C) as of 08/27/2012 to Demission (F) effective 09/21/2016 **Chapter:** Initiate (D B C) as of 08/27/2012 to Demission (F) effective 09/21/2016 **Council:** Initiate (D B C) as of 08/27/2012 to Demission (F) effective 09/21/2016 **Consistory:** Initiate (D B C) as of 08/27/2012 to Demission (F) effective 09/21/2016 *Quick change request generated by Sentinel V2 user tfannin.*
9/22/2016	Test Valley	Pending Approval	Sam Adams	**Lodge:** Initiate (D B C) as of 01/01/2016 to Expulsion (L) effective 09/22/2016 **Chapter:** Initiate (D B C) as of 01/01/2016 to Expulsion (L) effective 09/22/2016 **Council:** Initiate (D B C) as of 01/01/2016 to Expulsion (L) effective 09/22/2016 **Consistory:** Initiate (D B C) as of 01/01/2016 to Expulsion (L) effective 09/22/2016 *Quick change request generated by Sentinel V2 user samartin.*

The "Complete" entry shows that a request was submitted by the Valley to demit Herb C. Dunn, Jr. on 11/29/2014, and the request was completed.

The first "Pending Approval" entry shows that a request was submitted on 9/21/2016 to demit Tucker P. Bailey IV, and the request remains pending.

The second "Pending Approval" entry shows that a request was submitted on 9/22/2016 to expel Sam Adams, and the request remains pending.

3.7 SOJOURNER SEARCH

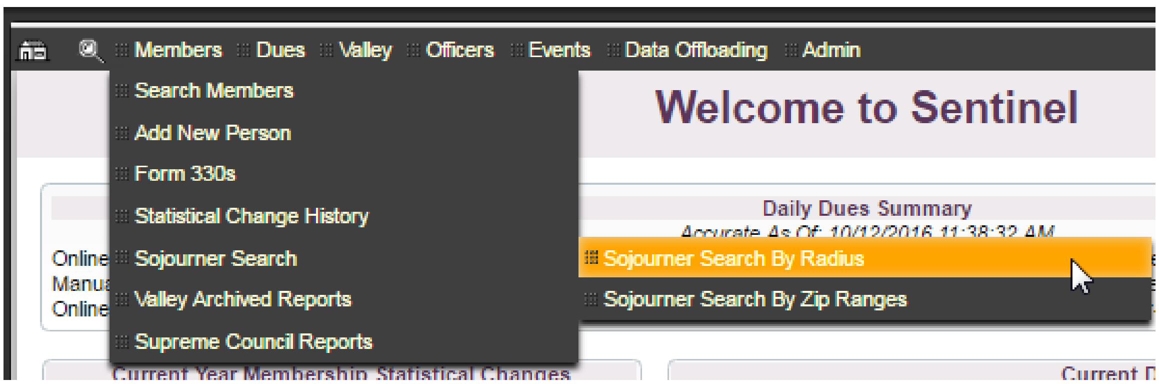
Sojourners are Scottish Rite, Southern Jurisdiction, members who reside in an Orient but are not members of any Valley in that Orient. Sentinel provides two ways to search an Orient for Sojourners: **Sojourner Search by Radius** and **Sojourner Search by Zip Ranges**.

3.7A SOJOURNER SEARCH BY RADIUS

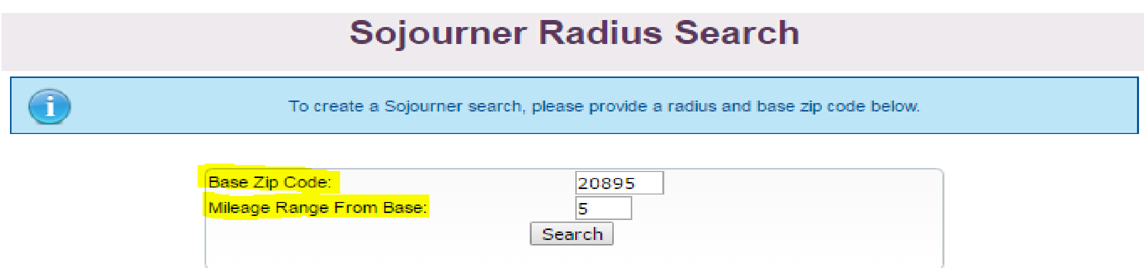
The **Sojourner Search by Radius** allows you to identify Sojourners who live a certain number of miles from a particular zipcode.. For instance, you can find all of Sojourners who live within five miles of the zipcode 20895. In essence, the radius search creates a circle around a zip area and returns all of the Sojourners living in that circle.

Follow these steps to perform a **Sojourner Search by Radius:**

1. Expand the **Members** menu and click the **Sojourner Search by Radius** option on the submenu

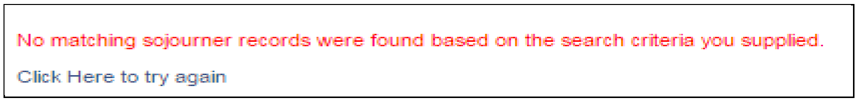


2. Enter a **Base Zip Code** and a **Mileage Range from Base**. For this example, we will use 20895. Click the **Search** button.

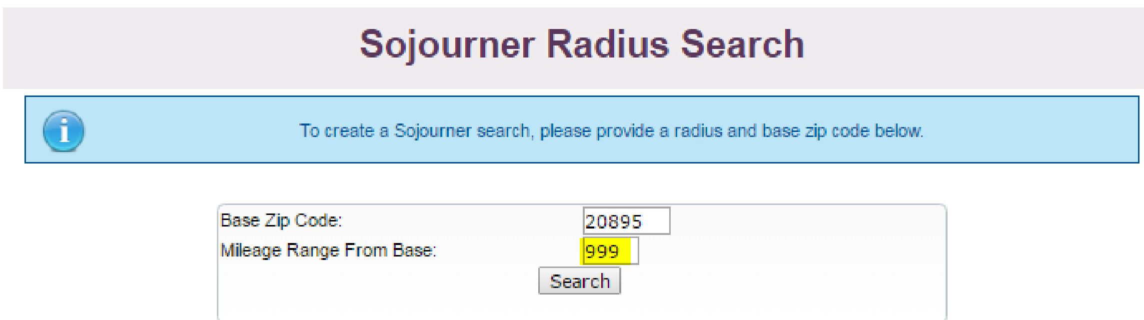


Sentinel will display a list of results on the screen. Regretfully, we cannot display the results of a Sojourner Search in this training guide because we cannot publish actual member addresses and contact information, but please give it a try to see how it works.

If there are no Sojourners in your search area, Sentinel will display the following message:



If you want to search for all Sojourners in an entire Orient, enter a **Zipcode Base Value** and enter 999 as the **Mileage Range from Base** as shown in the following graphic:

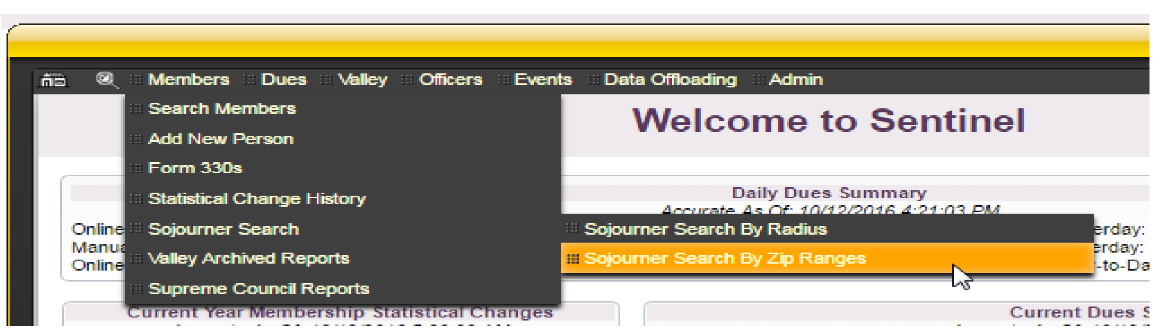


3.7B SOJOURNER SEARCH BY ZIP RANGES

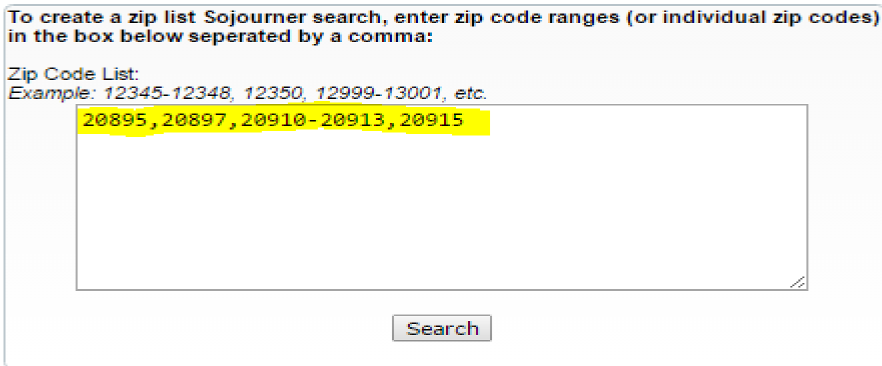
The **Sojourner Search by Zip Ranges** allows you to identify Sojourners who live within a single zipcode area or in a range of zip code areas.. For instance, you can find all of Sojourners who have a zipcode of 20895, or 20895-20899. You can mix the search critera to include mutiple zipcodes and zipcode ranges as in "20895,20897, 20985-20999."

Follow these steps to perform a **Sojourner Search by Radius:**

1. Expand the **Members** menu and click the **Sojourner Search by Zip Ranges** option on the submenu.

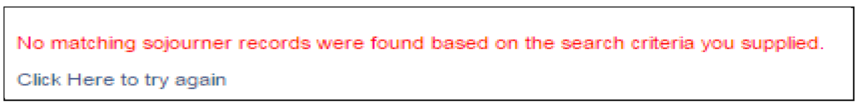


2. Enter one number to search or a series of numbers. Click the **Search** button to display the results.



Regretfully, we cannot display the results of a Sojourner Search in this training guide because we cannot publish actual member addresses and contact information, but please give it a try to see how it works.

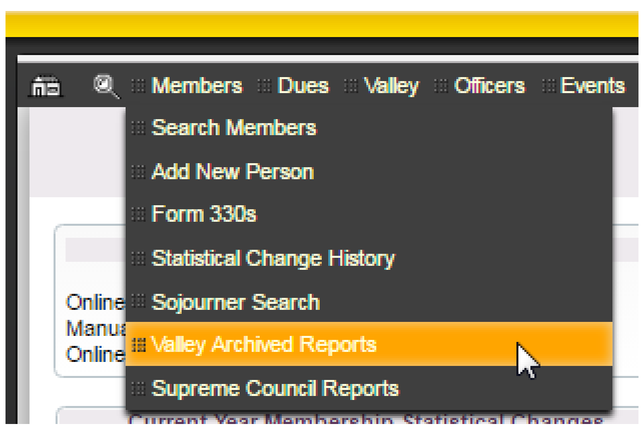
If there are no Sojourners in your search area, Sentinel will display the following message:



3.8 VALLEY ARCHIVED REPORTS

Valley Archived Reports is a storage area for all of the reports that you create in Sentinel and want to save. In addition, your Form 330s for Initiates and Fees are stored in in this area as well. For those of you familiar with Sentinel, version 1, **Valley Archived Reports** takes the place of **Form 330 Reprints**.

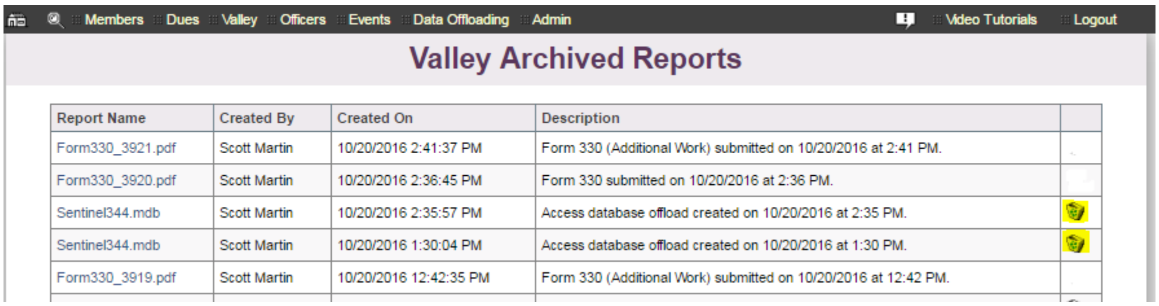
To view your saved reports, click **Valley Archived Reports** on the **Members** Menu.



Your archived reports screen should look similar to the table below. Click the **Report Name** on your screen to view the report.

Notice that the user has performed two Access database offloads. To the right of the entry there is a trash can that the user can click to delete the reports at will. Notice also that there is no trash can next to the Form 330 entries. There is no option to delete Form 330s. These reports will be retained by the system for archival purposes.

Form 330 Reports are stored indefinitely for archival purposes. The user cannot delete them.

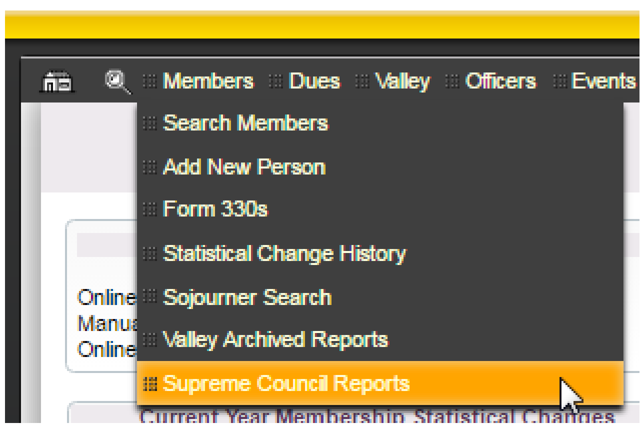


Report Name	Created By	Created On	Description	
Form330_3921.pdf	Scott Martin	10/20/2016 2:41:37 PM	Form 330 (Additional Work) submitted on 10/20/2016 at 2:41 PM.	
Form330_3920.pdf	Scott Martin	10/20/2016 2:36:45 PM	Form 330 submitted on 10/20/2016 at 2:36 PM.	
Sentinel344.mdb	Scott Martin	10/20/2016 2:35:57 PM	Access database offload created on 10/20/2016 at 2:35 PM.	
Sentinel344.mdb	Scott Martin	10/20/2016 1:30:04 PM	Access database offload created on 10/20/2016 at 1:30 PM.	
Form330_3919.pdf	Scott Martin	10/20/2016 12:42:35 PM	Form 330 (Additional Work) submitted on 10/20/2016 at 12:42 PM.	

3.9 SUPREME COUNCIL REPORTS

The offices of the Supreme Council will deliver a variety of reports to your Valley directly through Sentinel. Examples of these reports include annual membership reports and monthly online electronic payment deposit reports.

To view your delivered reports, click **Supreme Council Reports** on the **Members** menu.



Your reports' screen should look similar to the following table. Click the report name in the **File** column on your screen to open the report.

Members Dues Valley Officers Events Data Offloading Admin Video Tutorials Logout

Supreme Council Published Reports

ReportType	File	Description	Created	Created By
Online Dues Payment Report	MonthlyOnlineDues_February_2015.pdf	This is your February 2015 online dues payment report for your valley.	3/12/2015	Sandra Mukiri
Annual Alpha Member Listing	Aberdeen_2014_AAML.pdf	This is your valley's 2014 year-end alpha membership listing report	2/16/2015	Tammy Fannin
Annual Gains and Losses	Aberdeen_2014_AGAL.pdf	This is your valley's 2014 annual gains and losses report	2/16/2015	Tammy Fannin
Annual Recapitulation	Aberdeen_2014_RECAP.pdf	This is your valley's 2014 membership recapitulation report	2/16/2015	Tammy Fannin
Online Dues Payment Report	MonthlyOnlineDues_January_2015.pdf	This is your January 2015 online dues payment report for your valley.	2/10/2015	Sandra Mukiri

CHAPTER 4: MEMBERSHIP STATUS CHANGES

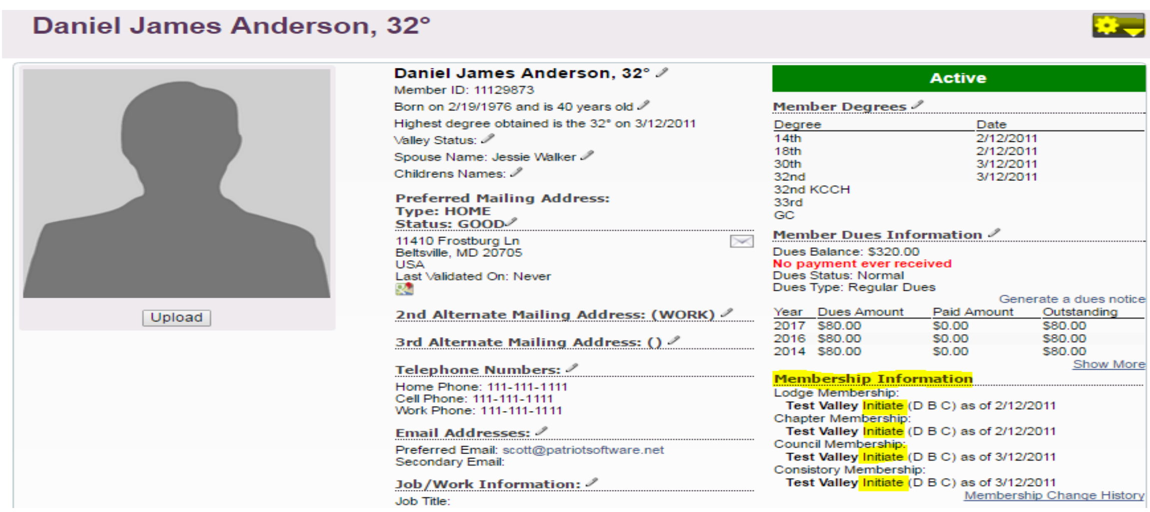
We define a member's status as his current relationship with his Scottish Rite Valley—that is, his current status or relationship is either as an initiate, reinstatement, affiliation, demission, expulsion, or death. A member's current status displays on his **Profile Screen** under Member **Information**.

This chapter will show you how to perform the following functions:

- Submit a statistical change to update a member to reinstated, affiliated, demitted, or expelled
- Update a member's record to "Deceased"
- Report a member as affiliated or reinstated who does not have an existing Sentinel record

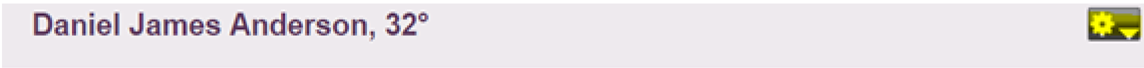
4.1 CHANGE A MEMBER'S STATUS (SUBMIT STATISTICAL CHANGE)

The following **Membership Information** shows that Daniel James Anderson's current status is "Initiate" in the Lodge, Chapter, Council, and Consistory. Let us assume that this member is demitting from your Valley to transfer to another Valley. In order to change his current status of "Initiate" to "Demit," you will use Sentinel to request a statistical change. This change request will be transmitted electronically to the Supreme Council Computer Services' staff that will review and activate the change as appropriate. Once activated, the member's record in Sentinel will show his current "Demit" status along with the effective date of the demit.

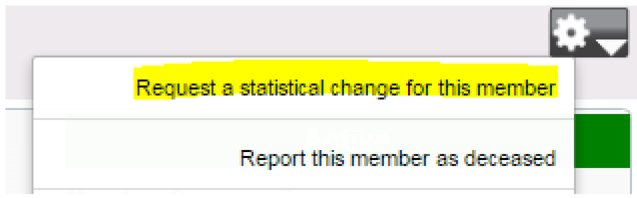


Follow these steps to change the member's current status from "Initiate" to "Demit."

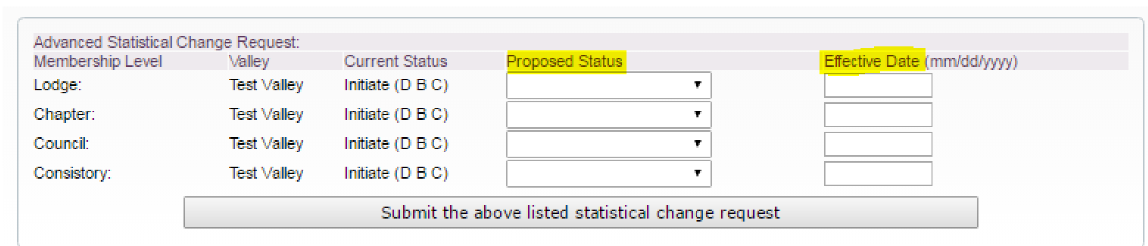
1. On the member's **Profile Screen,** click the "gear" icon in the upper right corner.



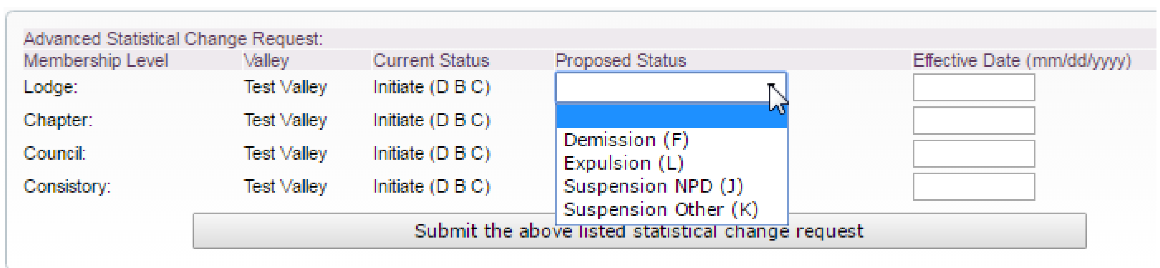
2. On the menu that opens, click Request a statistical change for this member.



3. The statistical change screen will open and display the following which shows the member's current status and blank boxes for the proposed status.



4. Click the downward pointing arrow under **Proposed Status** to display the status change options.



Submit only the levels of membership that are affected by a status change

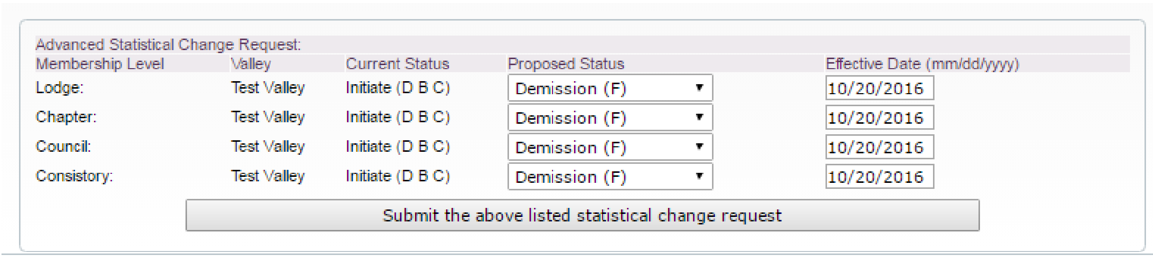
The system knows that you are changing the status of a member who is currently listed as "Initiate," so the menu only displays the options that can be applied to an initiate. Notice that there are no options to "Reinstate" or "Affiliate," as these actions would not be appropriate. Notice also that there is no option for "Death," because deceased changes are handled differently, and we will get to that a bit later. Notice also that there are letters next to each option in the menu. These are shorthand codes that are used for processing purposes only. You can disregard them.

5. Highlight your selection. In our example we are choosing, "Demission." The system will automatically fill in "Demission" for all four levels. If the member is not being demitted in all four levels, remove the

"Demission" status for those levels by using the dropdown menu to edit the field/fields. Choose the blank status at the top of the menu list on the dropdown.

6. Type in the effective date in the format of MM/DD/YYYY as 10/20/2016. The system will automatically fill in the remaining date fields.

Your completed submission will resemble the following:



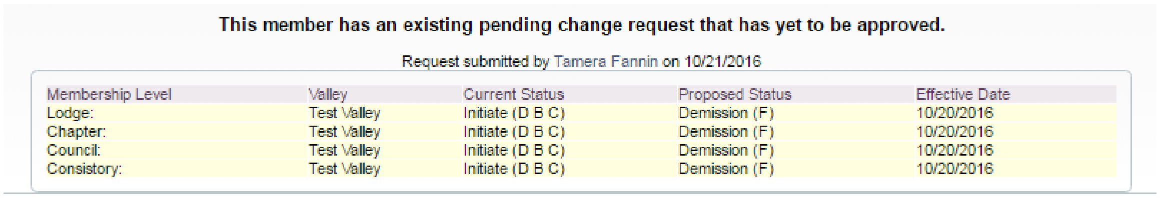
Advanced Statistical Change Request:

Membership Level	Valley	Current Status	Proposed Status	Effective Date (mm/dd/yyyy)
Lodge:	Test Valley	Initiate (D B C)	Demission (F)	10/20/2016
Chapter:	Test Valley	Initiate (D B C)	Demission (F)	10/20/2016
Council:	Test Valley	Initiate (D B C)	Demission (F)	10/20/2016
Consistory:	Test Valley	Initiate (D B C)	Demission (F)	10/20/2016

Submit the above listed statistical change request

7. To submit the status change, click Submit the above listed statistical change request.

8. The system will return a message stating that the change is "Pending."



This member has an existing pending change request that has yet to be approved.

Request submitted by Tamera Fannin on 10/21/2016

Membership Level	Valley	Current Status	Proposed Status	Effective Date
Lodge:	Test Valley	Initiate (D B C)	Demission (F)	10/20/2016
Chapter:	Test Valley	Initiate (D B C)	Demission (F)	10/20/2016
Council:	Test Valley	Initiate (D B C)	Demission (F)	10/20/2016
Consistory:	Test Valley	Initiate (D B C)	Demission (F)	10/20/2016

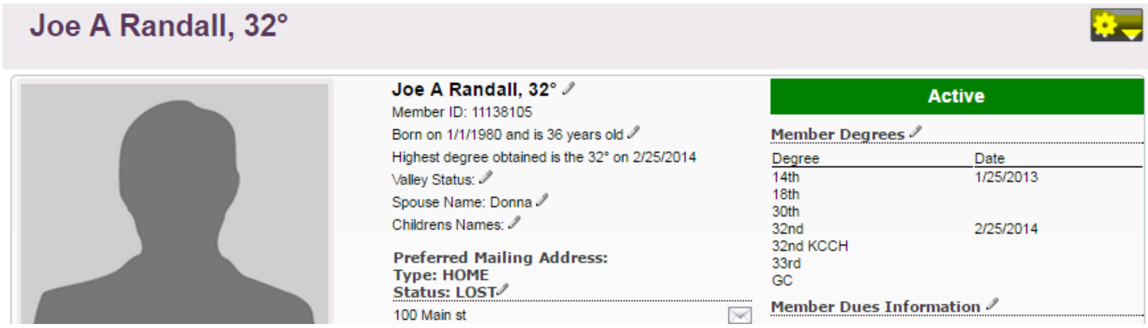
The member's **Profile Screen** will also display that a "Pending" change is present, and the notice will remain on his record until the change is reviewed and activated by the Supreme Council Computer Services' staff.

4.2 CHANGING A MEMBER'S STATUS TO DECEASED

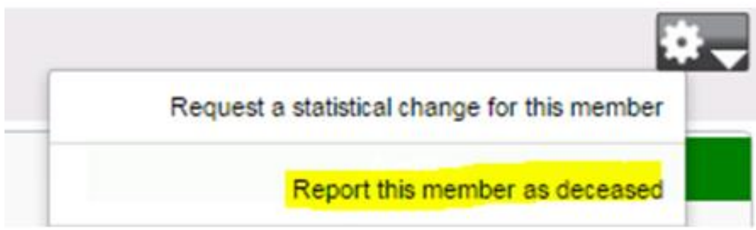
When a member dies, you will need to enter his date of death in his membership record. This is done on his **Profile Screen**. Once you enter the date of death and save it, the system applies the change to his record in real time—that is, you do not need to submit an electronic request to the Supreme Council to have his record updated.

Follow these steps to change a member's record to deceased:

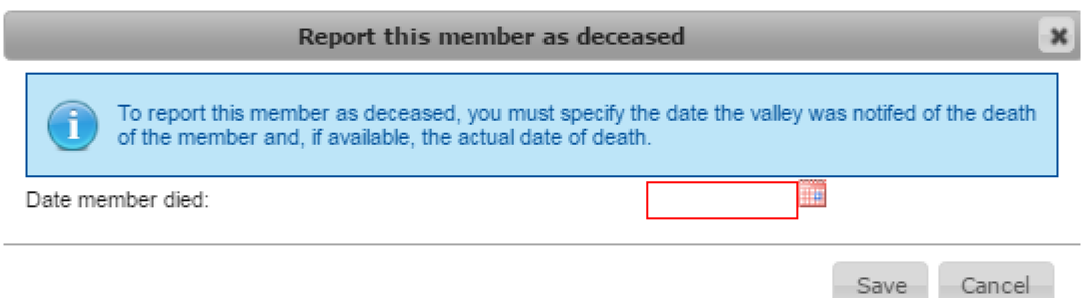
1. On the member's Profile Screen, click the "gear" icon in the upper right corner to open the status change menu.



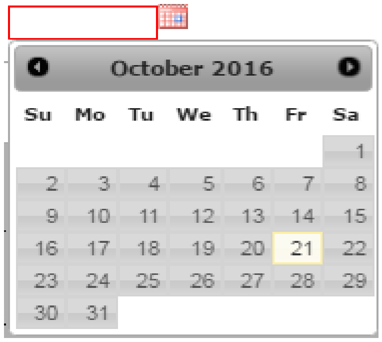
2. When the menu opens, click Report this member as deceased.



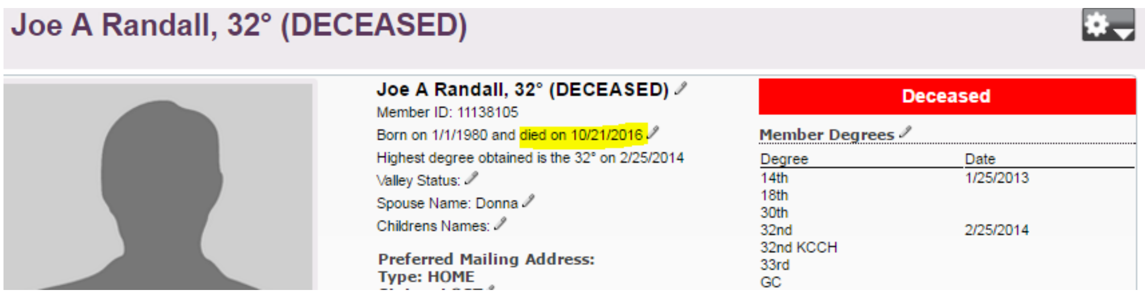
3. The update window will appear on your screen.



You can also use the calendar to choose a date.



4. Click the **Save** button. The record is updated to "Deceased," and the date of death is inserted on the Profile Screen.



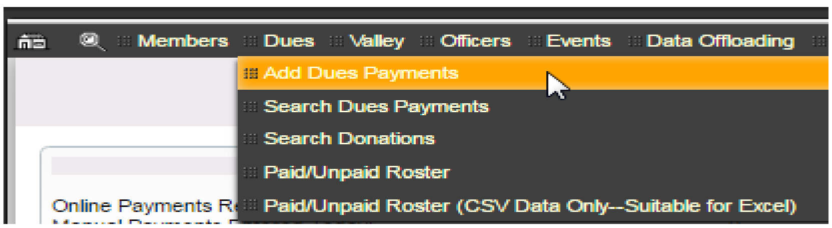
CHAPTER 5: DUES

All Valleys are required to manage membership dues payments in Sentinel. The information entered for members is made available to all of your members through the online Member Portal in real time. Thus, it is imperative that dues records are updated in a timely manner so that your members have access to the most up-to-date dues payment information online.

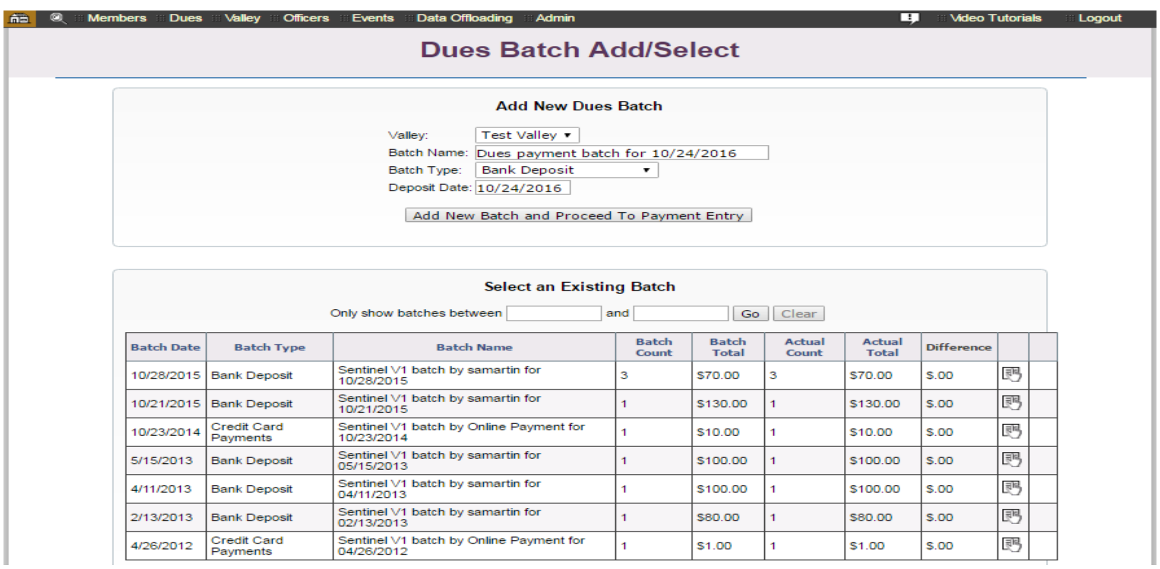
5.1 ADD DUES PAYMENTS

This section will show you how to add cash, check, and credit card payments for membership dues.

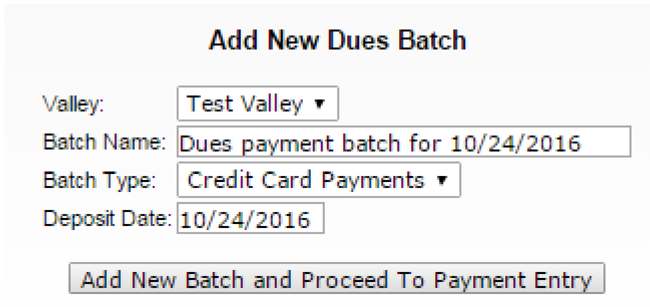
You will find the **Add Dues Payment** option on the **Dues** tab on the Sentinel black menu bar.



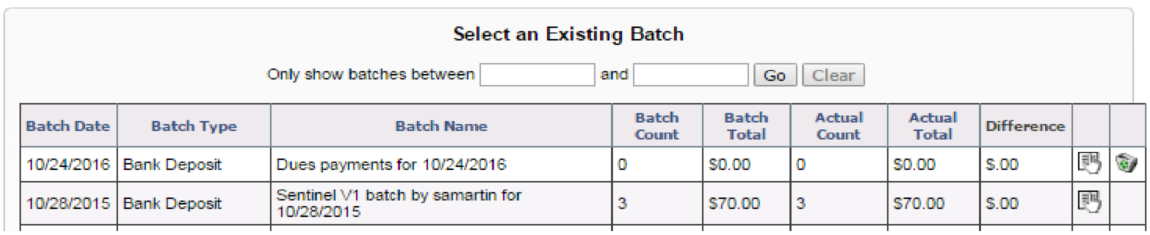
Click on Add Dues Payments to open the Dues Batch Add/Select screen.



You can enter dues in two ways: Create a new dues batch or add payments to an existing batch. The sample page above displays a section to **Add New Dues Batch.**



...and a section to Select an Existing Batch.


Select an Existing Batch

Only show batches between and Go Clear

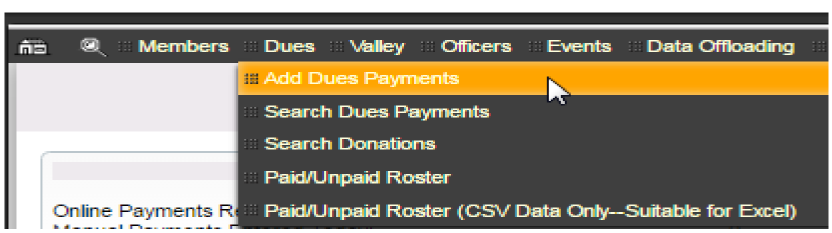
Batch Date	Batch Type	Batch Name	Batch Count	Batch Total	Actual Count	Actual Total	Difference		
10/24/2016	Bank Deposit	Dues payments for 10/24/2016	0	$0.00	0	$0.00	$.00		
10/28/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/28/2015	3	$70.00	3	$70.00	$.00		

We will explain each of these processes in the next two sections.

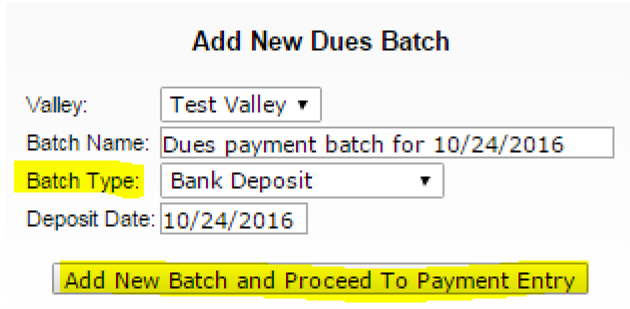
5.2A ADD A NEW DUES BATCH

Follow these instructions to add a brand new dues batch:

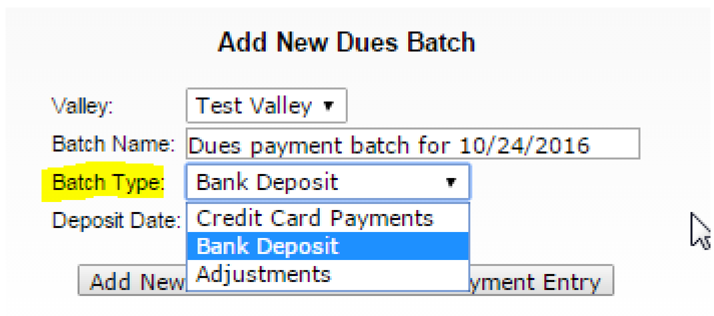
1. Click the **Add Dues Payment** option on the **Dues** tab on the Sentinel black menu bar.



2. The **Valley** name will show your Valley name. The system will automatically enter the **Batch Name and** a **Deposit Date** as the current date.



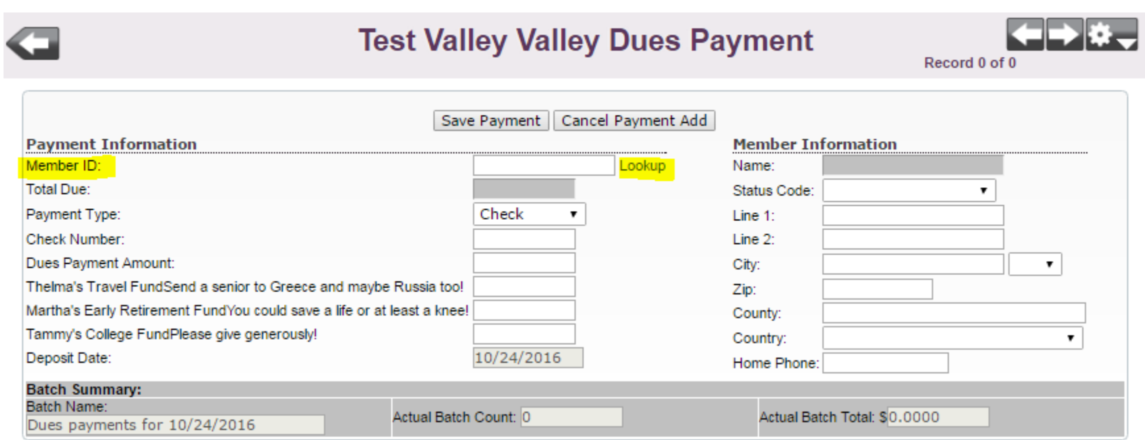
3. Use the Batch Type dropdown menu to choose the type of batch you are entering: **Bank Deposit** (cash and checks), **Credit Card**, or **Adjustment**. For this example we are choosing **Bank Deposit**



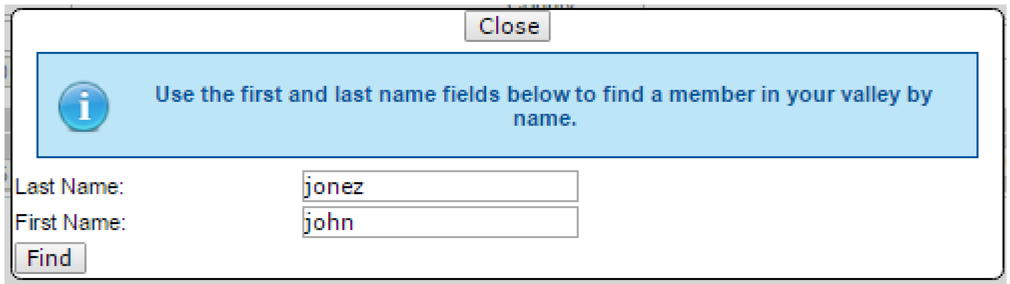
.

4. Click **Add New Batch** and Procceed to Payment Entry.

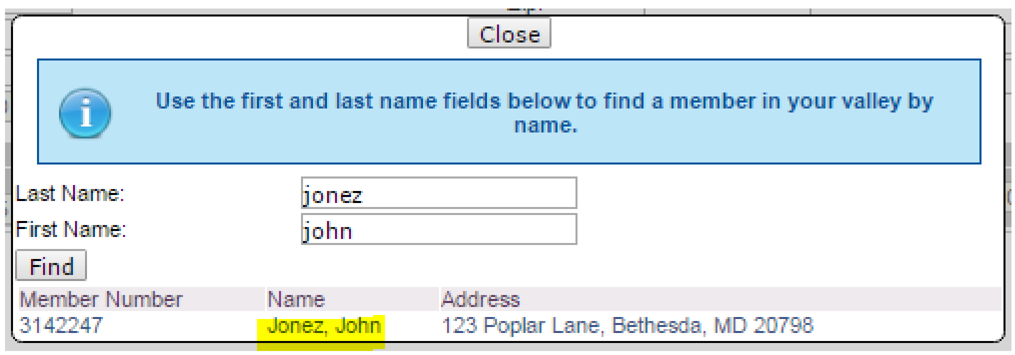
5. The **Valley Dues Payment** screen will open. Type the member's identification number in the **Member ID** box and press the "Tab" key on your keyboard.



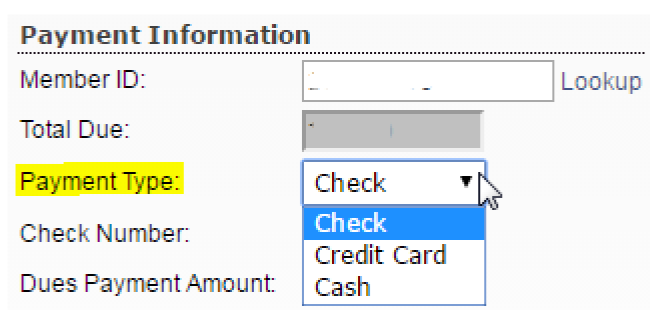
If you do not have an ID number, you can use the **Lookup** feature. Click **Lookup**. Enter the member's name in the window that opens and click **Find**.



When you click the **Find** button, Sentinel displays the member's name. Click the name to select it.



6. After you have performed either Step 4 or Step 5 to display the member's payment, the payment window will open. Choose a **Payment Type** by clicking the dropdown menu arrow to display the choices. Make a selection by highlighting Check, Credit Card, or Cash. If the payment is by check, you can enter the number in the **Check Number** box.



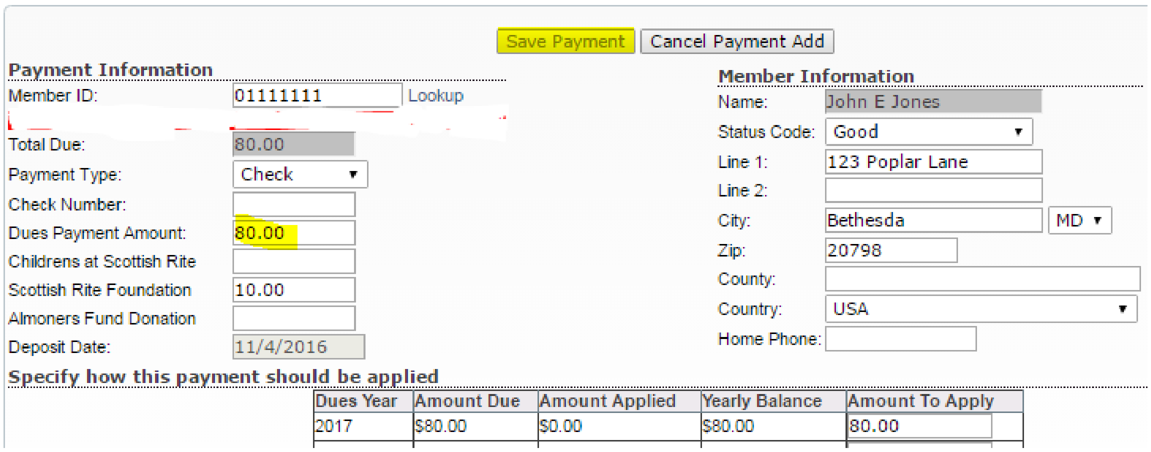
7. Next, the total balance due is displayed as the **Dues Payment Amount**. In this example, the balance is $80. If needed, you can edit this amount by deleting the displayed amount and typing in a different amount. For example, the member may be making an underpayment or an overpayment.

8. Next, the payment screen displays the three charitable donations in the order that they were printed on your member dues notices. If the member is making a donation, enter the dollar amount of the donation in the appropriate box next to the name of the charity.

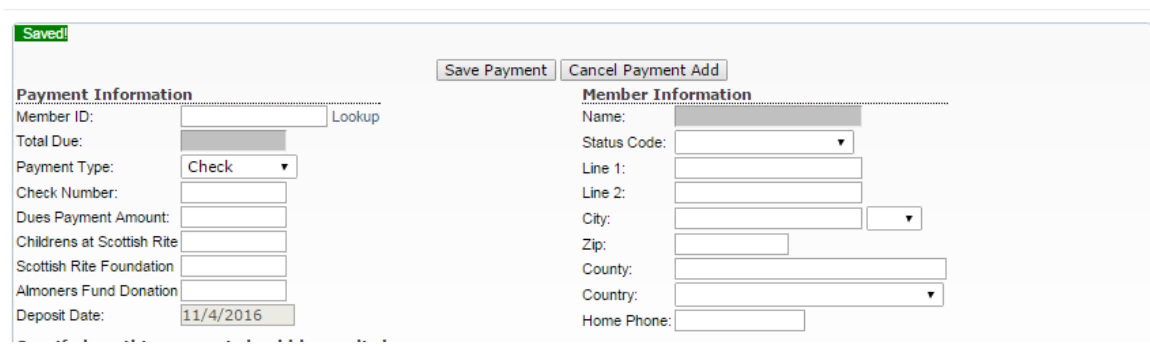
9. Update the member's address if necessary.

10. Click the **Save Payment** button. The payment is saved to the member's dues record.

The following image shows a payment of $80 for 2017 plus a $10 donation to the Scottish Rite Foundation



11. Sentinel confirms that the payment was successful by displaying **"Saved"** in the upper left corner of the screen. The payment area is cleared so that you can enter your next payment.

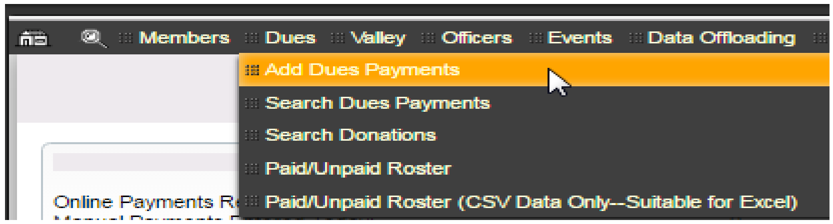


5.2B ADD PAYMENTS TO AN EXISTING DUES BATCH

You can add dues payments to an existing batch at any time. For instance, if you create a batch in the morning and close the batch. You can reopen it later in the day and add additional payments.

Follow these instructions to open an existing batch of payments:

1. Click the **Add Dues Payment** option on the **Dues** tab on the Sentinel black menu bar.



2. Sentinel will display a list of all of the previously entered dues batches entered for your Valley.

Select an Existing Batch

Only show batches between [ ] and [ ] Go Clear

Batch Date	Batch Type	Batch Name	Batch Count	Batch Total	Actual Count	Actual Total	Difference		
10/28/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/28/2015	3	$70.00	3	$70.00	$.00		
10/21/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/21/2015	1	$130.00	1	$130.00	$.00		
10/23/2014	Credit Card Payments	Sentinel V1 batch by Online Payment for 10/23/2014	1	$10.00	1	$10.00	$.00		

Over time your batch list will get very long. You can control the amount of batches displayed by entering a date range in the box labeled, "Only show batches between."

As an example, to show only batches entered from 10/21/2015 through 10/28/2015, you would enter the following date range and click the **Go** button.

Select an Existing Batch

Only show batches between 10/21/2015 and 10/28/2015 Go Clear

Sentinel displays the batches created between those two dates:

Select an Existing Batch

Only show batches between 10/21/2015 and 10/28/2015 Go Clear

Batch Date	Batch Type	Batch Name	Batch Count	Batch Total	Actual Count	Actual Total	Difference		
10/28/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/28/2015	3	$70.00	3	$70.00	$.00		
10/21/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/21/2015	1	$130.00	1	$130.00	$.00		

To enter additional payments in an existing batch, click the hand icon for the batch that you wish to open. For our example, let's use the "Bank Deposit" batch with "Batch Date" 10/21/2015.

Add Dues Payment to Batch

Number of payments: 1, Batch Date: 10/21/2015, Batch Total: $130.00

Member ID	Name	Deposit Date	Dues Amount	Box 1 Amount	Box 2 Amount	Box 3 Amount	Total Payment Amount	Payment Origin	
11138105	Randall, Joe	10/21/2015	$130.00	$0.00	$0.00	$0.00	$130.00	Manually entered	
1									

Notice in the above display that the **Add Dues Payment to Batch** table that the "Payment Origin" is "Manually entered." Remember! All Bank Deposit batches are either check or cash payments, which means that a Sentinel user "Manually entered" the payment into the system. You will always want to group all of your cash and/or check payments in a **Bank Deposit** batch and all credit card payments in a **Credit Cards Payments** batch.

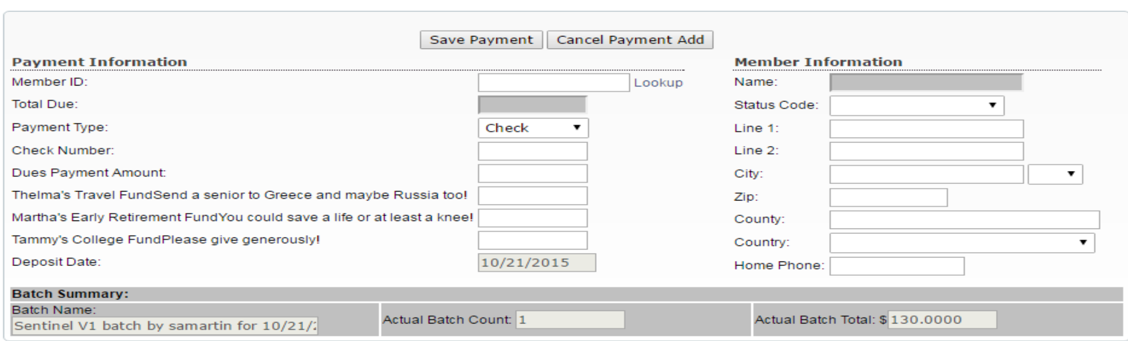
3. Click the Add Dues Payment to Batch button.

Add Dues Payment to Batch

Number of payments: 1, Batch Date: 10/21/2015, Batch Total: $130.00

Member ID	Name	Deposit Date	Dues Amount	Box 1 Amount	Box 2 Amount	Box 3 Amount	Total Payment Amount	Payment Origin	
11138105	Randall, Joe	10/21/2015	$130.00	$0.00	$0.00	$0.00	$130.00	Manually entered	

4. The payment screen opens. Adding payments to an existing batch is the same as adding payments to a new batch, so follow steps 3 through 10 of the preceding section.



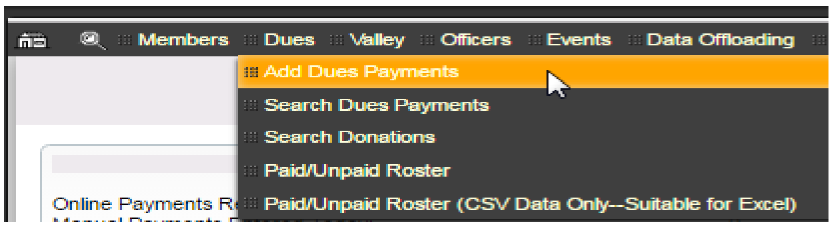
5.2C CREDIT CARD PAYMENTS

All Valleys can process credit card transactions using Sentinel. The process is secure and uses authorize.net which is a certified credit card processing provider. No credit card information is stored in Sentinel. Please note that authorize.net charges a credit card processing fee for each transaction: However, the Supreme Council pays 50 percent of the service fee.

Sentinel handles credit card dues payments the same way that the system handles check and cash payments. You can add a new credit card payment batch or add credit card payments to an existing batch. Therefore, if you are not familiar with the payment entry process, review the two preceding sections: Add a New Dues Batch and Add Payments to an Existing Dues Batch .

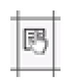
Follow these instructions to process credit card dues payments:

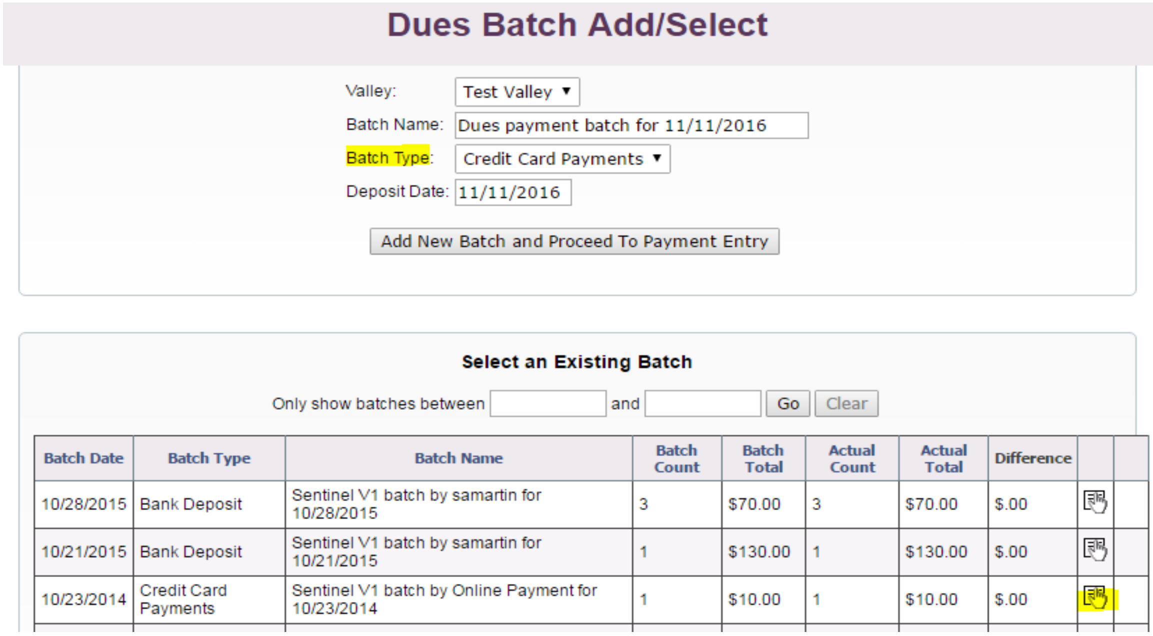
1. Click the **Add Dues Payment** option on the **Dues** tab on the Sentinel black menu bar.



2. The Dues Batch Add/Select screen opens.

   If you are creating a new credit card payment batch, choose **Credit Card Payments** from the **Batch Type** dropdown menu.

   If you want to **Select and Existing Batch,** click the hand  icon next to the **Credit Card Payments** batch that you want to open.


Dues Batch Add/Select

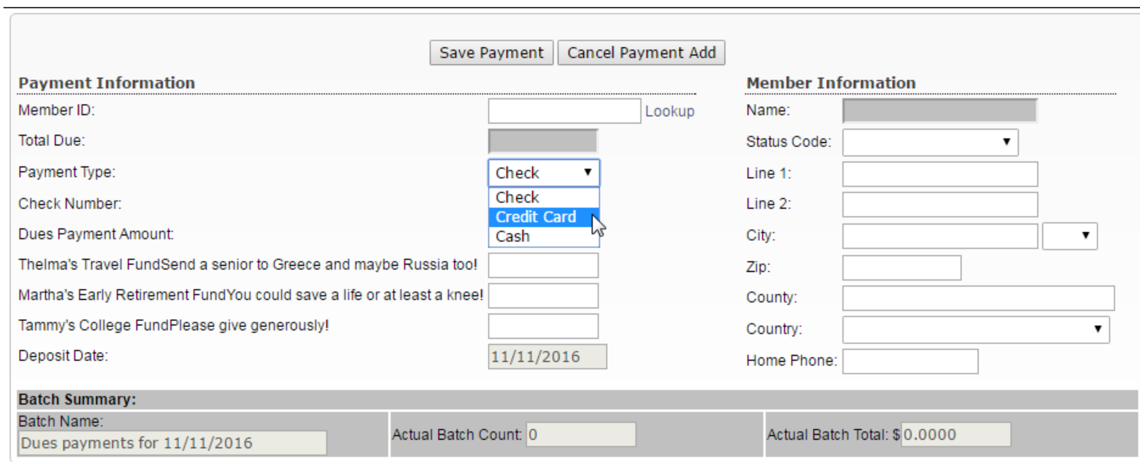
Valley: Test Valley
Batch Name: Dues payment batch for 11/11/2016
Batch Type: Credit Card Payments
Deposit Date: 11/11/2016
Add New Batch and Proceed To Payment Entry

Select an Existing Batch

Only show batches between and Go Clear

Batch Date	Batch Type	Batch Name	Batch Count	Batch Total	Actual Count	Actual Total	Difference		
10/28/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/28/2015	3	$70.00	3	$70.00	$.00		
10/21/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/21/2015	1	$130.00	1	$130.00	$.00		
10/23/2014	Credit Card Payments	Sentinel V1 batch by Online Payment for 10/23/2014	1	$10.00	1	$10.00	$.00		

3. The payment screen opens. Enter the **Member ID** and click the **Tab** key on your keyboard to load the member's payment information or click the **Lookup** link to search for a member's record. Choose "Credit Card" from the **Payment Type** dropdown menu.

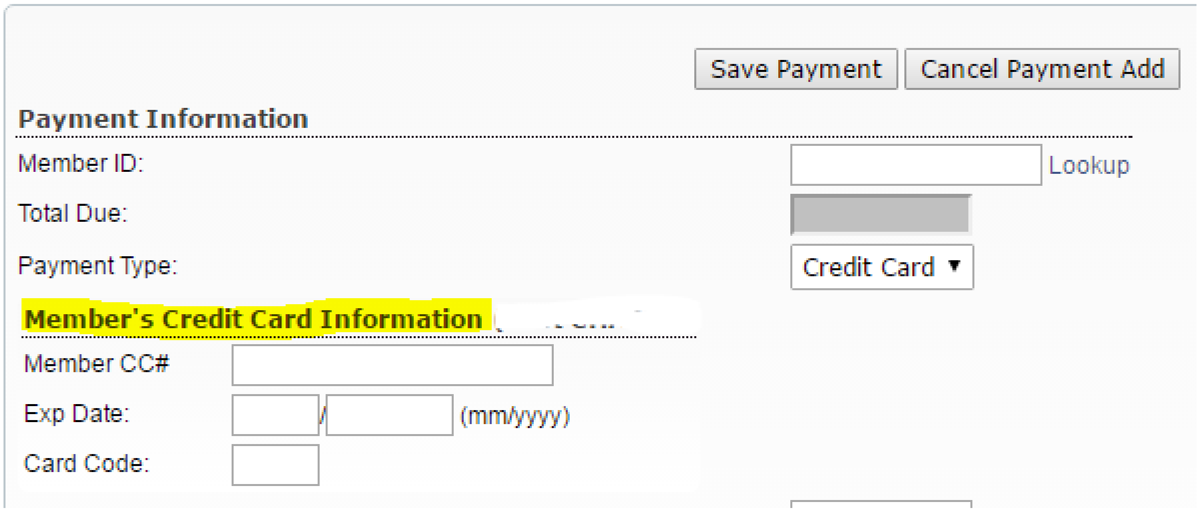

Save Payment Cancel Payment Add

Payment Information
Member ID: Lookup
Total Due:
Payment Type: Check
Check
Credit Card
Cash
Check Number:
Dues Payment Amount:
Thelma's Travel FundSend a senior to Greece and maybe Russia too!
Martha's Early Retirement FundYou could save a life or at least a knee!
Tammy's College FundPlease give generously!
Deposit Date: 11/11/2016

Member Information
Name:
Status Code:
Line 1:
Line 2:
City:
Zip:
County:
Country:
Home Phone:

Batch Summary:
Batch Name: Dues payments for 11/11/2016
Actual Batch Count: 0
Actual Batch Total: $ 0.0000

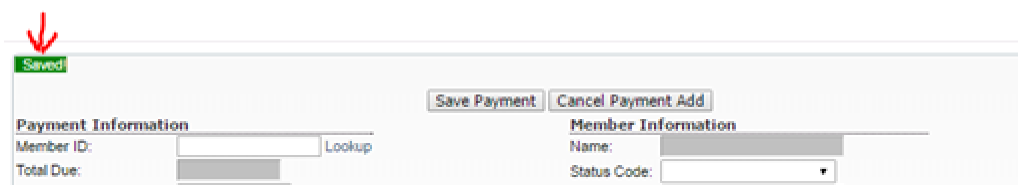
4. The screen will change to display the credit card information boxes. Enter the credit card information.



5. Complete the process by checking the balance due for accuracy. If you are entering an overpayment or underpayment, edit the **Dues Payment Amount**. Enter any charitable donations that apply and make any address updates as needed.

6. Click the **Save Payment** button.

7. Sentinel confirms that the payment was successful by displaying **"Saved"** in the upper left corner of the screen. The payment area is cleared so that you can enter your next payment.

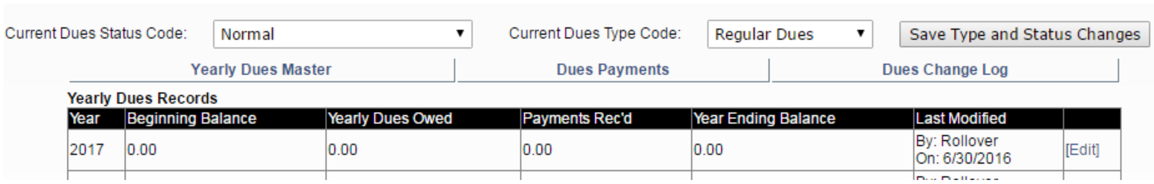


5.3 EDIT DUES PAYMENTS

You may find it necessary to change a member's total dues owed amount for a year or to correct and overpayment amount. The following sections will explain these procedures.

5.3A CHANGING THE TOTAL DUES OWED

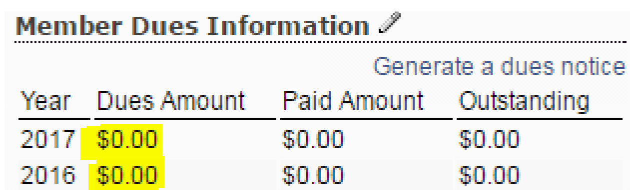
For this example we will use the record of a recently affiliated member. When a member first joins a Valley, his dues balance is set to zero. This applies to affiliated members, reinstated members (in some cases), and initiated members. A new member's record will look like the following:



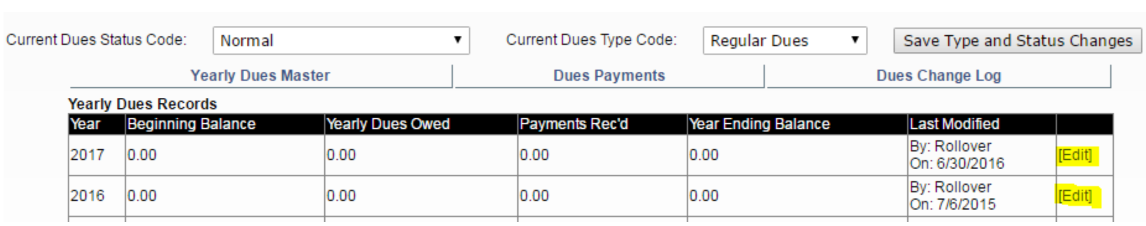
If the member has paid a certain amount or is going to be billed a certain amount, you will need to enter the **Beginning Balance** in his dues record. Follow these steps:

1. Display the member's **Profile** screen by performing a search for his record

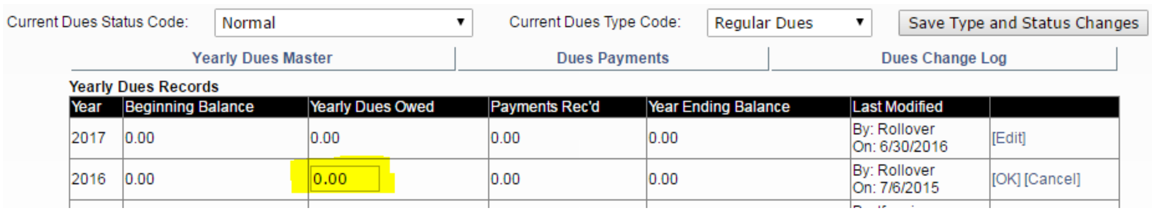
2. Locate the **Member Dues Information** section on his Profile screen. Your display should look similar to the following. The years you will see displayed are dependent on the individual member's payment history. Our sample member has been reinstated in 2016, but notice that he has no dues payment information for 2016 and 2017 displayed in his dues record.



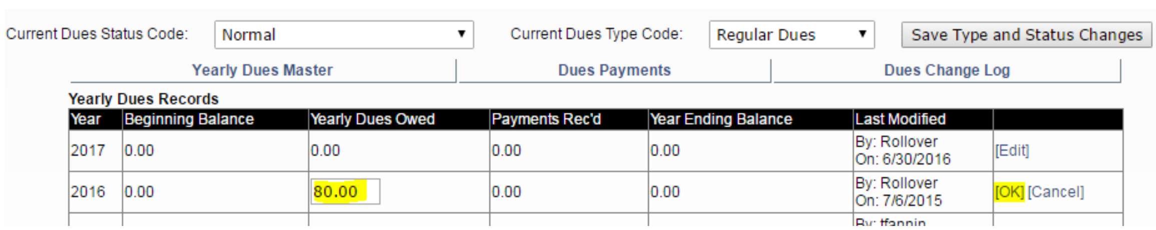
3. To change the **Dues Amount**, click the "pencil" icon next to Member Dues Information or hover your mouse pointer over the dues area and click anywhere in the darker gray area. The dues edit screen will open.
4.



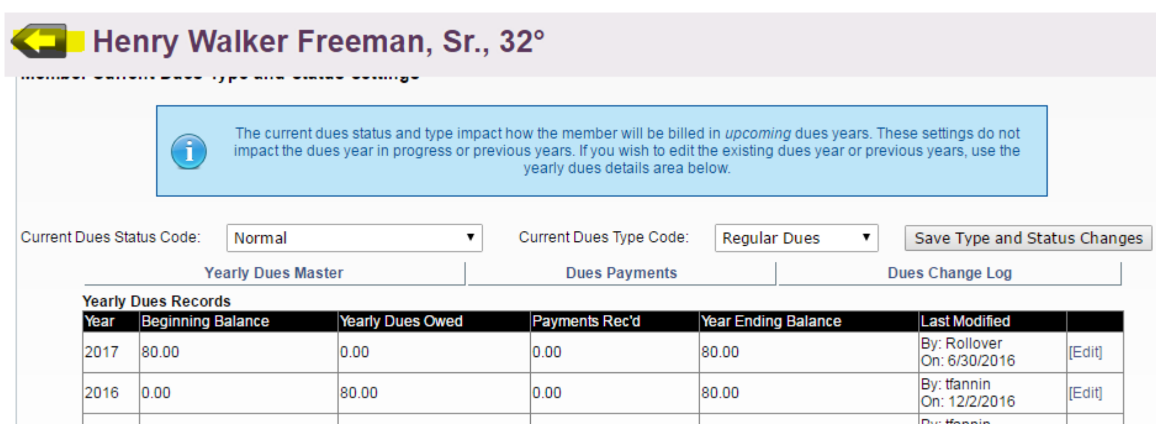
5. To enter a balance due for 2016 click the **Edit** button. A box will appear around the Yearly Dues Owed. Click in the box to replace 0.00 with the correct amount. For this example we will use 80.00.



5. Here is the edited amount. Click the **OK** button to save your change.



To confirm the change on the member's **Profile** screen, click the arrow in the upper corner of the screen. This will take you to his back to his **Profile**.



His Member Dues Information now shows him owing $80.00 for 2016. Follow the same instructions to edit his 2017 dues.

Member Dues Information

Generate a dues notice

Year	Dues Amount	Paid Amount	Outstanding
2017	$0.00	$0.00	$0.00
2016	$80.00	$0.00	$80.00
2014	$0.00	$0.00	$0.00

5.3B ADJUST A MEMBER'S DUES RECORD TO CORRECT AN OVERPAYMENT

In Sentinel, when you edit a previous payment amount, we call it an "**Adjustment.**" SentinelV1 users should note that the correction of an overpayment in this version of Sentinel is different from the way you handled it in version 1. SentinelV1 allowed the user to edit the **Paid Amount** by simply overwriting the existing **Paid Amount**. To enforce stricter accounting and to create a "paper trail," Sentinel will not allow this type of overwriting.

In Sentinel, to correct a **Paid Amount**, you will enter a new transaction. For our example, we will use a member who owed for 2016 and 2017 at a total amount of $160. He paid $80 for 2016, but his payment was incorrectly applied as $160. Here is his current payment information that Sentinel displays prior to the adjustment.

Member Dues Information

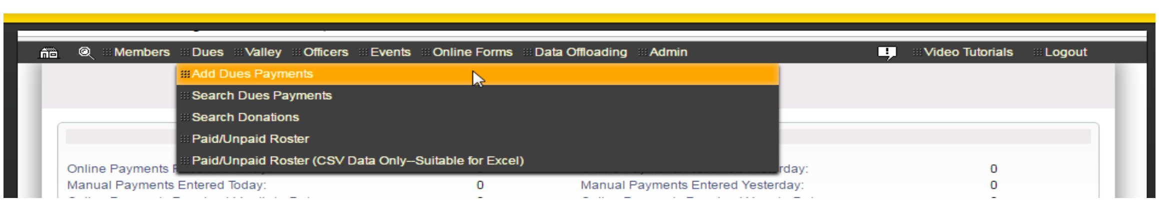
Dues Balance: $0.00
Last payment rec'd on 12/2/2016
Dues Status: Normal
Dues Type: Regular Dues

Generate a dues notice

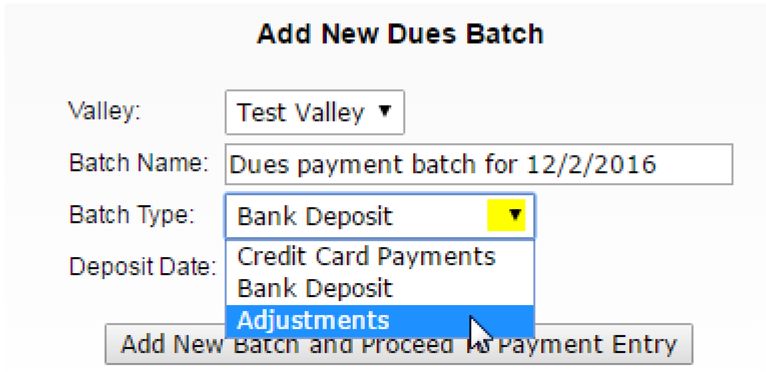
Year	Dues Amount	Paid Amount	Outstanding
2017	$80.00	$80.00	$0.00
2016	$80.00	$80.00	$0.00
2014	$0.00	$0.00	$0.00

Here are the instructions for creating an "Adjustment" transaction to change his amount paid from $160.00 to $80.00.

1. Select **Dues** on the Sentinel menu. Click **Add Dues Payments**.



2. Under **Add New Dues Batch**, use the dropdown arrow to open **the Batch Type** menu. Click on **Adjustments** to select it.



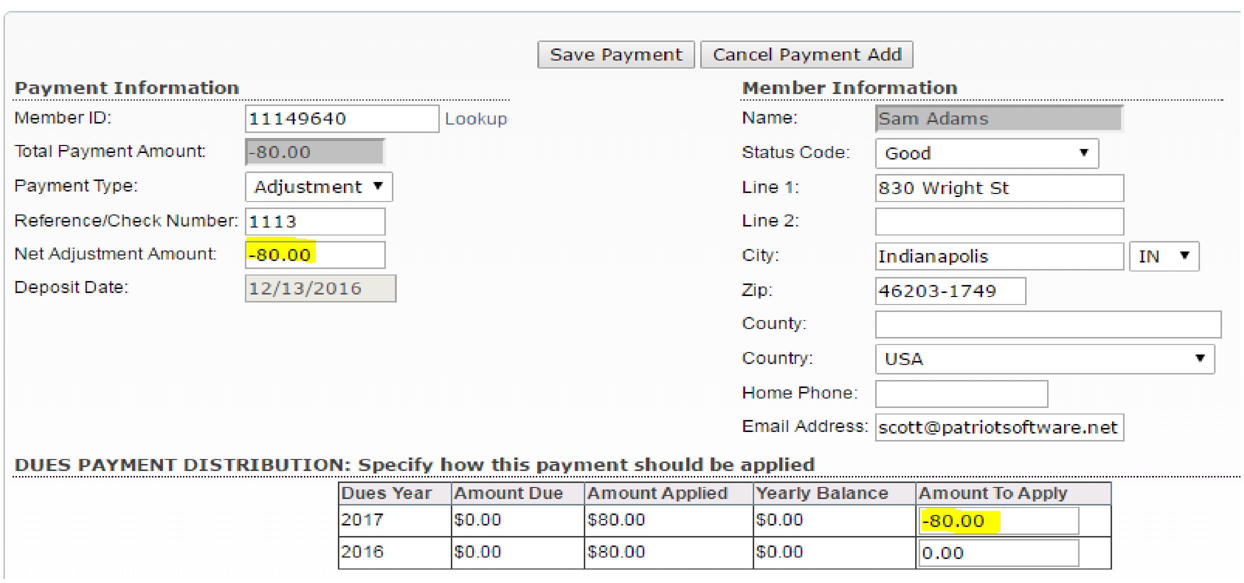
3. Click **Add New Batch and Proceed to Payment Entry**.

4. On the **Valley Dues Adjustment** screen, enter his **Member ID** and press the **Tab** button on your keyboard. Sentinel will load his payment information and contact information.

5. For this example, we are adjusting a payment made originally by "Check.," Add the check number of the original payment (optional but recommended).

   To reduce the incorrect payment amount from $160.00 to $80.00, type **-80.00** in the **Net Adjustment Amount**. This tells Sentinel to subtract $80.00 from his payment amount. Be sure to include the minus sign. Press the **Tab** button on your keyboard to refresh the screen.

   When you clicked the Tab button, Sentinel automatically placed -80.00 in the 2017 year at the bottom of the screen.



6. Click the **Save Payment** button to apply the -$80.00 adjustment amount to 2017. Now, if you go back to the member's **Profile** screen and check his Dues Payment Information, you will see that the incorrect payment for $80.00 has been removed from the 2017 row, and he now owes for that year.

Grand Total Dues Balance: $80.00

The member's grand total balance is the sum of all yearly net balances.

Year	Dues Amount	Paid Amount	Yearly Net Balance
2017	$80.00	$0.00	$80.00
2016	$80.00	$80.00	$0.00

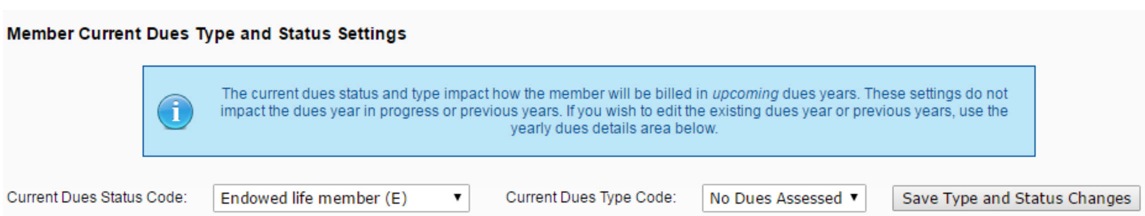
Show More

5.4 LIFE MEMBERSHIP MANAGEMENT

We can define Life Membership in two ways: Members who pay a lump sum to purchase a Life Membership and members who are considered Life Members after achieving the 50-year mark. The following sections show you how to create records for paid Life Members and 50-year Life Members.

5.4A PAID LIFE MEMBERS

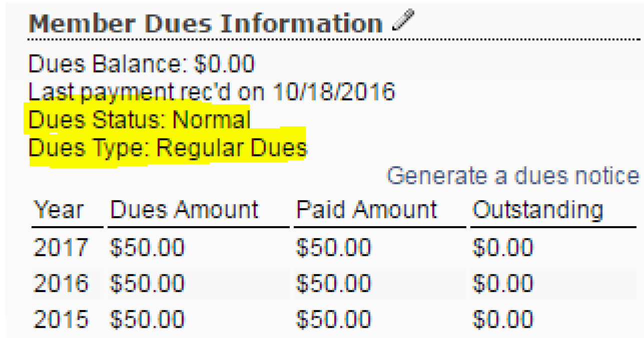
Valleys refer to paid Life Memberships in three ways: Life Member, Perpetual Member, or Endowed Member. Sentinel uses the "Endowed Member" term, and **the Current Dues Status Code** is set to **Endowed Life member (E),** and the **Current Dues Type Code** is set to **No Dues Assessed**.



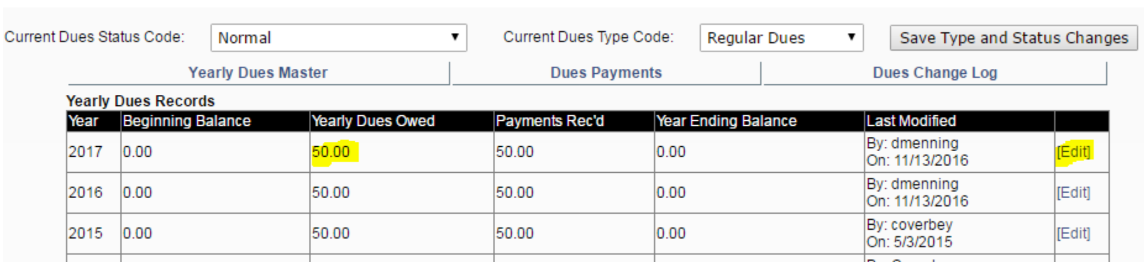
To change a member's dues record from dues paying to Endowed Life Member, follow these steps:

1. Display the member's **Profile** screen by performing a search for his record.

2. Locate the **Member Dues Information** section on his Profile screen. Your display should look similar to the following. The years you will see displayed are dependent on the individual member's payment history.



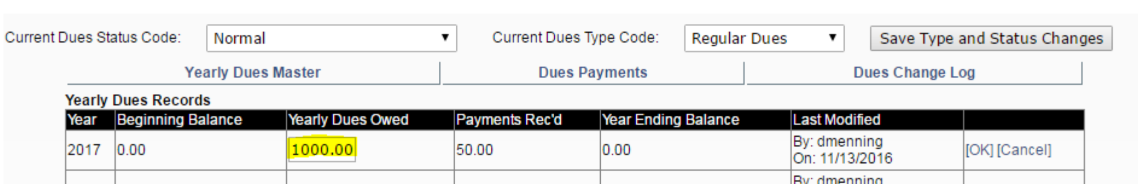
3. To change the member's **Dues Status**, **Dues Type**, and **Dues Amount**, click the "pencil" icon next to **Member Dues Information** or hover your mouse pointer over the dues area and click anywhere in the darker gray area. The dues edit screen will open.



4. For this example, we are using a member who has paid his annual dues through 2017; however, he is now purchasing a Life Membership in the amount of $1,000. Therefore, you will need to edit his Yearly Dues Owed to accept the $1,000 payment.

   To update his **Yearly Dues Owed**, click the **Edit** button on the 2017 payment row and enter $1000.00 as his **Yearly Dues Owed**.

5. Click the **OK** button to save the change.



Notice that the member has already made a $50.00 payment for 2017. If this $50.00 is to be applied to the purchase of his Life Membership, then he has a remaining balance due of $950.00. Use Go to Dues and Add Dues Payments to process his payment.

Current Dues Status Code: Normal ▼ Current Dues Type Code: Regular Dues ▼ Save Type and Status Changes

Yearly Dues Master | Dues Payments | Dues Change Log

Yearly Dues Records

Year	Beginning Balance	Yearly Dues Owed	Payments Rec'd	Year Ending Balance	Last Modified	
2017	0.00	1,000.00	50.00	950.00	By: tfannin On: 12/2/2016	[Edit]

6. After adding the $950.00 payment, his **Member Dues Information** on his member **Profile** will look like the following:

Member Dues Information

Dues Balance: $0.00
Last payment rec'd on 12/2/2016
Dues Status: Normal
Dues Type: Regular Dues

Generate a dues notice

Year	Dues Amount	Paid Amount	Outstanding
2017	$1,000.00	$1,000.00	$0.00
2016	$50.00	$50.00	$0.00
2015	$50.00	$50.00	$0.00

7. The $950.00 payment has been applied to 2017 and added to the $50.00 already paid. He has a zero balance due, but his **Dues Status** and **Dues Type** do not yet show him as an Endowed Life Member. To change this go back to his member Profile screen and click on his **Member Dues Information** to display the **Edit** screen.

8. Select Endowed Life Member (E) and No Dues Assessed. Click the Save Type and Status Changes button.

Current Dues Status Code: Endowed life member (E) ▼ Current Dues Type Code: No Dues Assessed ▼ Save Type and Status Changes

Yearly Dues Master | Dues Payments | Dues Change Log

Yearly Dues Records

Year	Beginning Balance	Yearly Dues Owed	Payments Rec'd	Year Ending Balance	Last Modified	
2017	0.00	1,000.00	1,000.00	0.00	By: tfannin On: 12/2/2016	[Edit]

Adding an Endowed Member (also called Life and Perpetual) seems like a lot of steps, but it is actually on three steps:

1. Edit the dues to show the new balance due
2. Apply the payment
3. Update the Current Dues Status Code and Current Dues Type Code

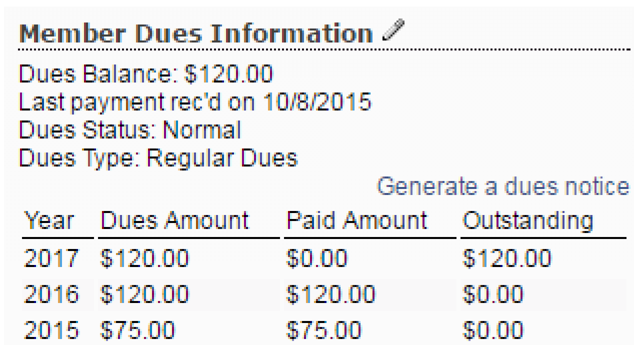
5.4B 50-YEAR LIFE MEMBER MANAGEMENT

Some Valleys consider 50-Year members as Life Members, but other do not. If yours is a Valley that exempts 50-Year members from dues payment, follow these steps to identify your 50-Year members as Life Members.

To change a member's dues record from dues paying to Endowed Life Member, follow these steps:

1. Display the member's **Profile** screen by performing a search for his record.

2. Locate the **Member Dues Information** section on his Profile screen. Your display should look similar to the following. The years you will see displayed are dependent on the individual member's payment history.

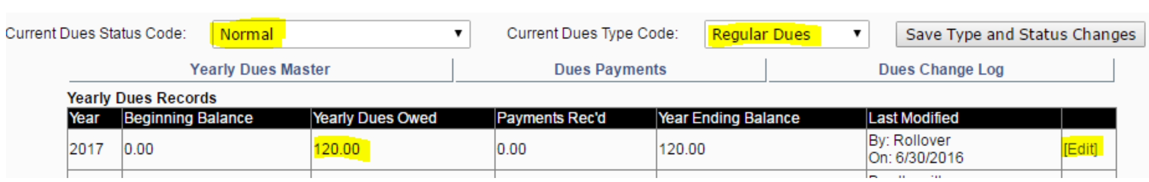

Member Dues Information

Dues Balance: $120.00
Last payment rec'd on 10/8/2015
Dues Status: Normal
Dues Type: Regular Dues

Generate a dues notice

Year	Dues Amount	Paid Amount	Outstanding
2017	$120.00	$0.00	$120.00
2016	$120.00	$120.00	$0.00
2015	$75.00	$75.00	$0.00

3. To change the member's **Dues Status**, **Dues Type**, and **Dues Amount**, click the "pencil" icon next to **Member Dues Information** or hover your mouse pointer over the dues area and click anywhere in the darker gray area. The dues edit screen will open.


Current Dues Status Code: Normal   Current Dues Type Code: Regular Dues   Save Type and Status Changes

Yearly Dues Master | Dues Payments | Dues Change Log

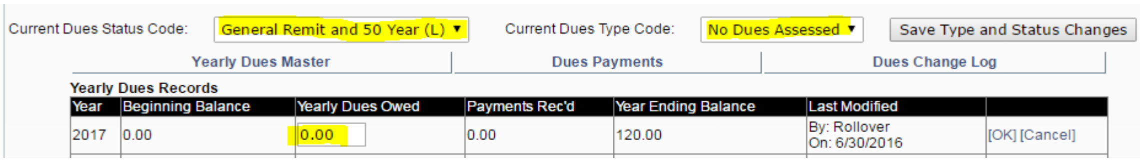
Yearly Dues Records

Year	Beginning Balance	Yearly Dues Owed	Payments Rec'd	Year Ending Balance	Last Modified	
2017	0.00	120.00	0.00	120.00	By: Rollover On: 6/30/2016	[Edit]

4. Change the Current Dues Status Code to General Remit and 50-Year Life and change the Current Dues Type Code to No Dues Assessed.

5. Next, click the **Edit** button and change the **Yearly Dues Owed** amount to 0.00.

   Your changes should look like the following.



6. Click the **Save Type and Status Changes** button to save your changes.

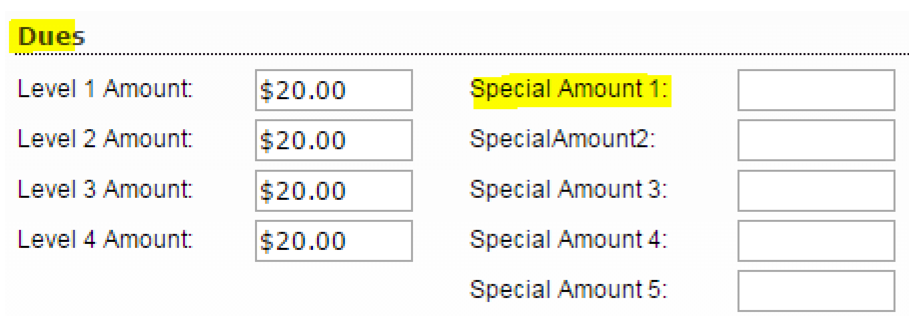
5.5 SPECIAL DUES AMOUNTS

Every Valley sets an amount of yearly dues owed by its members. Some Valleys set an amount, such as $100, to be paid by each member annually. However, there may be members for which you might want to charge a different amount than the $100. There are several reasons that a Valley might want to adjust yearly dues based on a member's particular health of financial circumstances. This decision is up to the Orient and Valley.

To accommodate different yearly dues amounts, Sentinel provides up to five dues options called **Special Dues Amounts.** Once Sentinel is programmed to accept these special dues amounts, the system will automatically produce dues notices that display the special amount, rather than the full dues amount. And the system will continue to apply this amount until you elect to change it.

You can view and manage these amounts on the **Valley** tab on Sentinel's main menu bar. To display the **Special Dues Amount** section, hover the mouse pointer over **Valley** and click **Valley Details.** Locate the Dues section on the lower left area of the page.

Your **Dues** area will differ from the following based on information that you have already entered for your Valley. The Valley dues amount is displayed on the left. The sample Valley distributes its $80 annual dues over the Lodge, Chapter, Council, and Consistory. (Levels 1, 2, 3, 4). The **Special Amount** boxes 1 through 5 are displayed on the right.



If you have members who will pay an amount other that what is required for Lodge, Chapter, Council, and Consistory members (displayed in the left column), then you will need to enter the dollar amount in the **Special Amount** box/boxes. For instance, you may have a single member or a group of members that you want to bill $50 each year. The first step to making this happen is to enter $50 in one of your Special Amount boxes. Since the Special Amount box #1 is empty, we will place the $50 amount in that box. We also have a group of members who will be billed for $20. We will place the $20 in Special Amount box #2.

Creating a Special Dues Amount is a two-step process: 1) Set the dues amount on the Valley page. 2) Update the member's dues record on his Profile page.

After apply the above updates, our information now looks like the following display:

Dues

Level 1 Amount:	$20.00	Special Amount 1:	$50.00
Level 2 Amount:	$20.00	SpecialAmount2:	$20.00
Level 3 Amount:	$20.00	Special Amount 3:	
Level 4 Amount:	$20.00	Special Amount 4:	
		Special Amount 5:	

Now that we have told Sentinel that we have members who will pay $50 and members who will pay $20, we have to tell Sentinel who these members are. Follow these steps:

1. Use the Lollipop Search or the Member Ad-Hoc search to display the **Profile** page of the member that is to invoiced $20 for annual dues.

2. On the member's Profile page, locate the **Member Dues Information** in the rightmost column on the page. There is a Pencil icon displayed (see below in yellow). Anytime you see this pencil icon in Sentinel, you can click on it to edit information.

Member Dues Information

Status: Normal — Generate a dues notice
Type: Regular Dues
Last payment rec'd on 1/14/2017

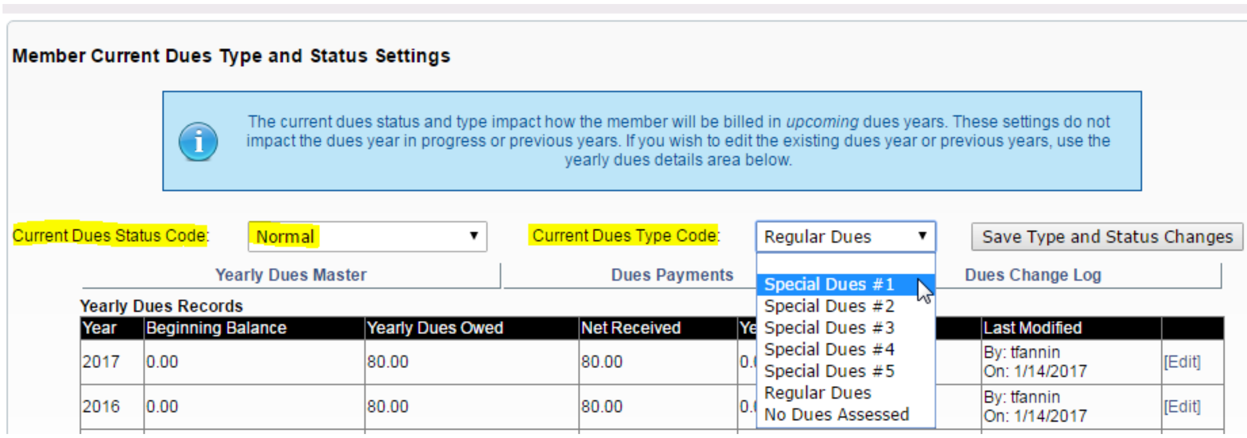
Grand Total Dues Balance: $0.00

The member's grand total balance is the sum of all yearly net balances.

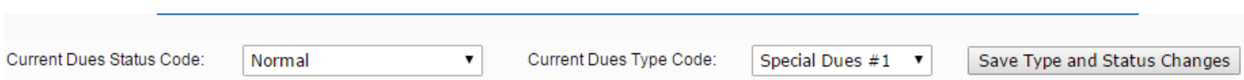
Year	Dues Amount	Paid Amount	Yearly Net Balance
2017	$80.00	$80.00	$0.00
2016	$80.00	$80.00	$0.00
2014	$80.00	$80.00	$0.00

3. Click the **Pencil** to open the edit screen. If the **Current Dues Status Code** is not set to **Normal**, use the dropdown menu to change it to **Normal**. The "Normal" setting identifies the member as a dues-paying member as opposed to a Life Member or dues-remitted member.

   Now we want to tell Sentinel to regularly invoice this member for $50 which we assigned to Special Dues Amount #1. Use the **Current Dues Type Code** dropdown menu to highlight Special Dues #1.



4. Your screen should now resemble the following display. Click the **Save Type and Status Changes** button to apply your update.

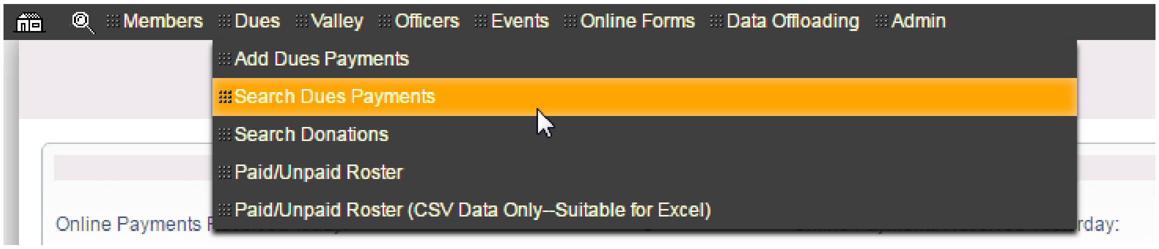


   You have now updated the member's dues record to automatically calculate his yearly dues for $50. Follow the same steps for any other members that you wish to assign to Special Dues #1 or any other Special Dues amounts that you have created.

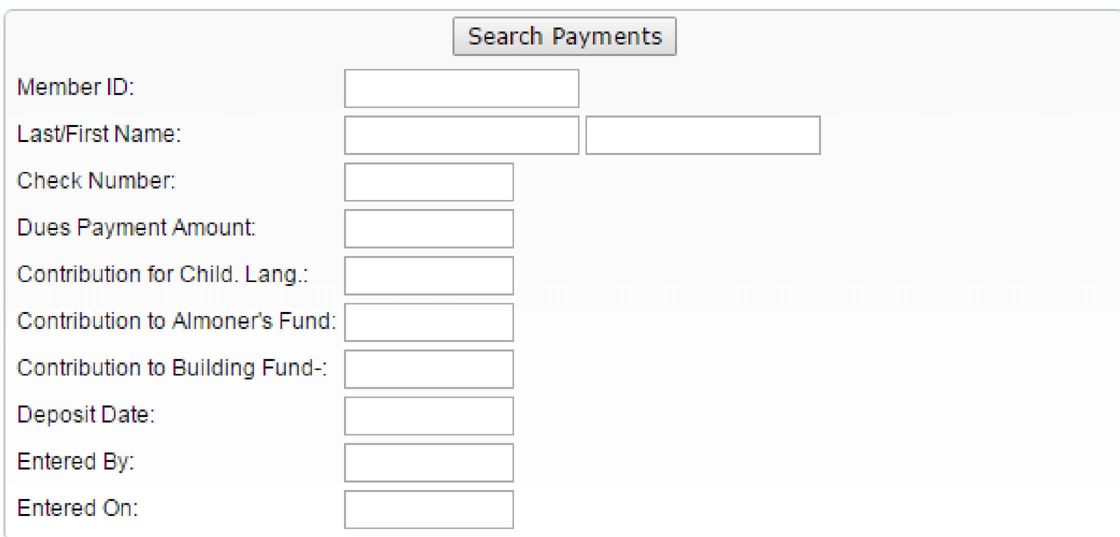
   Keep in mind that any outstanding amount due for past years will be added to this $50. Therefore, if past dues are being waived, you will need to remove any past due amount in his record. For instructions on editing dues amounts, see Section 5.3

5.6 SEARCH DUES PAYMENTS

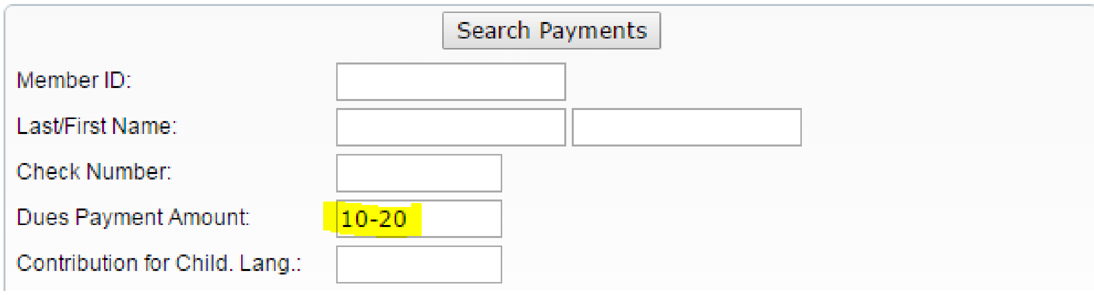
All payments entered can be searched and displayed on the screen and displayed as reports. The **Search Dues Payments** feature is located on the **Dues** menu.



1. Click **Search Dues Payments** to open the search screen. You can search using any of the boxes available on the screen. For example, if you wanted to see all the payments made by one member, enter his **Member ID** and click **Search Payments** or you can enter his **Last/First Name** and click **Search Payments**.

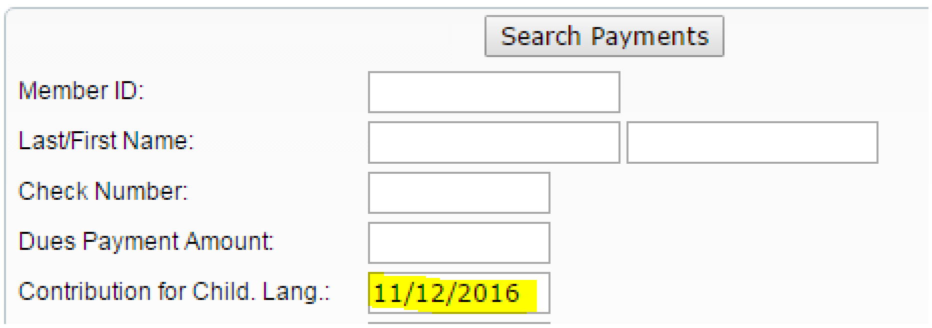


2. You can search for a single **Dues Payment Amount** or a range by adding the dollar amount or range amount in the **Dues Payment Amount** box like this:

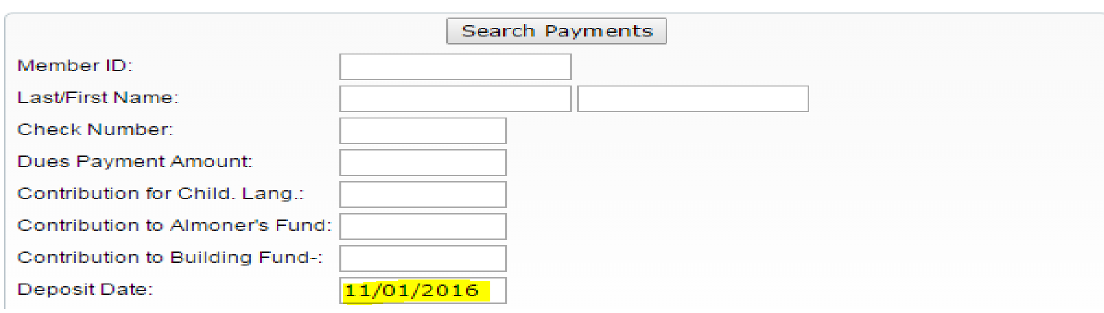


3. You can search for donations for the three funds displayed on a dues notice. This box is a date search. You can enter a single date or a date range (Date Range Example: 01/01/2016-12/31/2016.

Please Note! Additional donation searches will be covered in the next section, Search Donations.



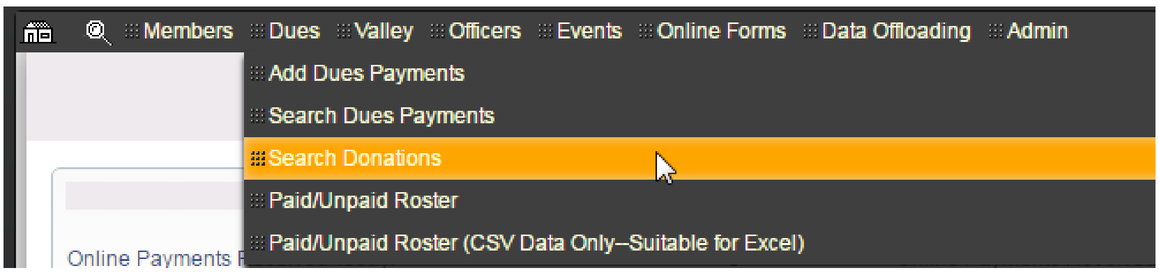
4. You can search by Deposit date for a single date or a date range (Date Range Example: 01/01/2016-12/31/2016).



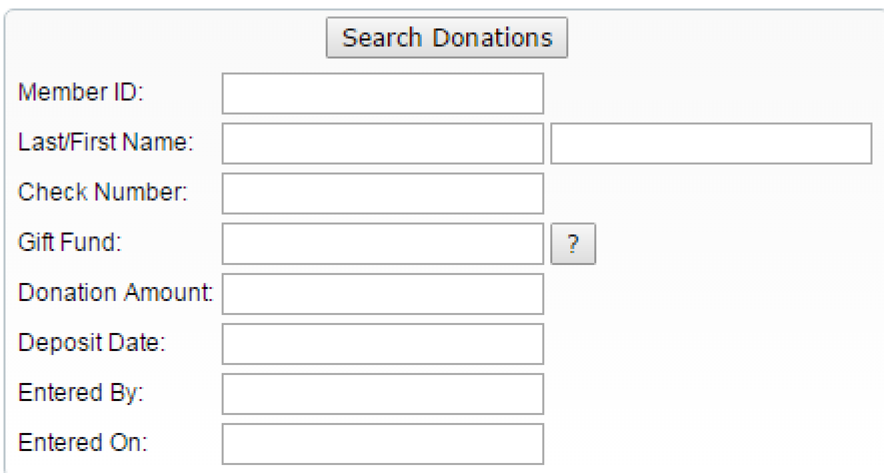
5. You can search by Entered By, Entered On, and you can use multiple search boxes as in the following search that looks for all entries by user "tsmith" made on "11/01/2016."

5.7 SEARCH DONATIONS

All donations entered can be searched and displayed on the screen and displayed as reports. The **Search Donations** feature is located on the **Dues** menu.

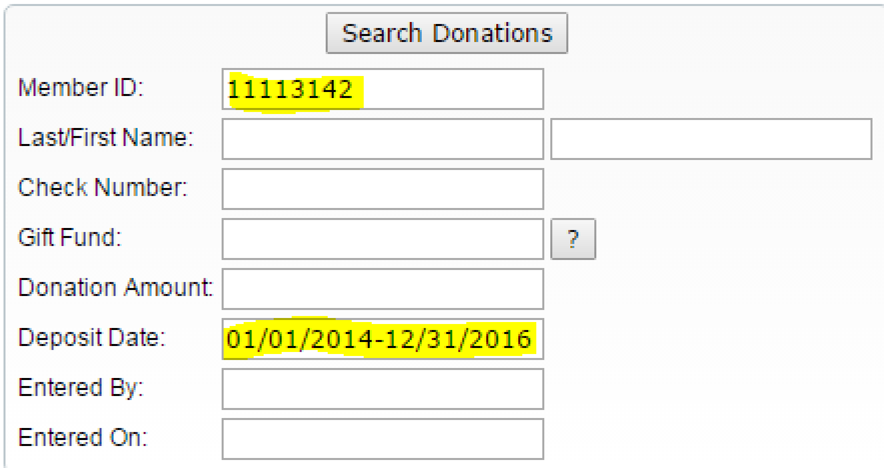


1. Click **Search Donations** to open the search screen.

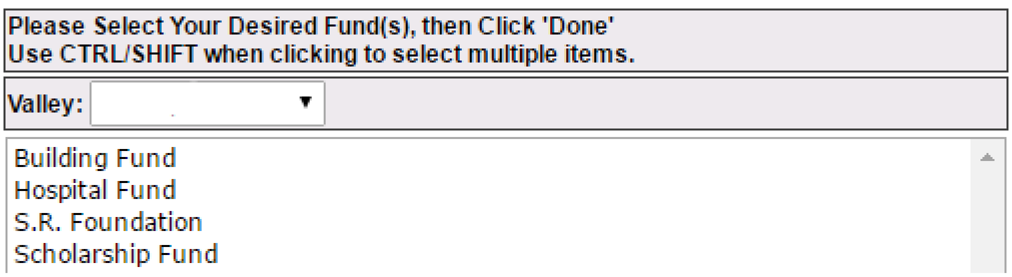


2. You search by entering search criteria in the boxes. For example, search for all donations made by a single member by entering his **Member ID** and click **Search Donations** or you can enter his **Last/First Name** and **click Search Donations**.

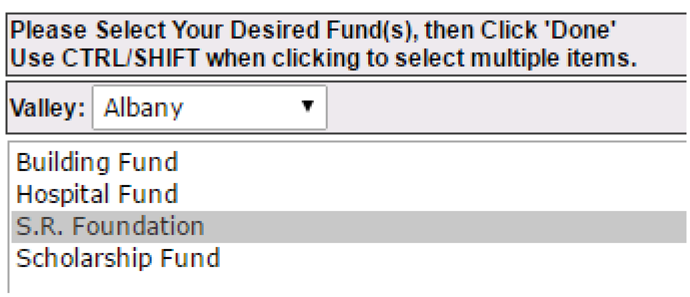
3. You can search on multiple fields. For example, you can find all donations made by a member during a defined period by entering his **Member ID** or name combined with a date range in the **Deposit Date** field. Your search would look like the following:

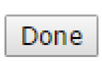


4. You can search for all gift funds. First, click the question mark  on the **Gift Fund** line to display all of the Valley's gift funds (charities).

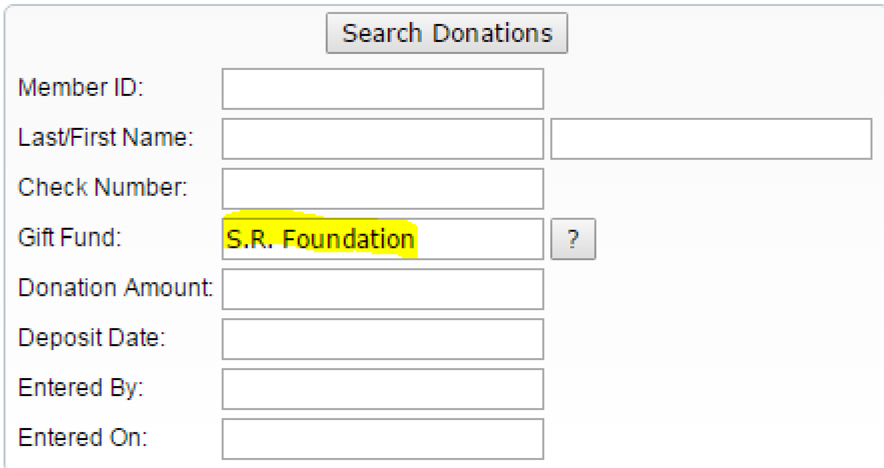


5. Highlight the **Gift Fund** that you want to search on. Tip! You can search on multiple funds by holding down the Ctrl key on your keyboard while you select multiple Gift Funds.



6. Click the **Done**  button at the bottom of the screen. Sentinel will display your selection in the search form.

7. Click **Search Donations** to display all donations to the S. R. Foundation.



5.8 PAID/UNPAID ROSTER

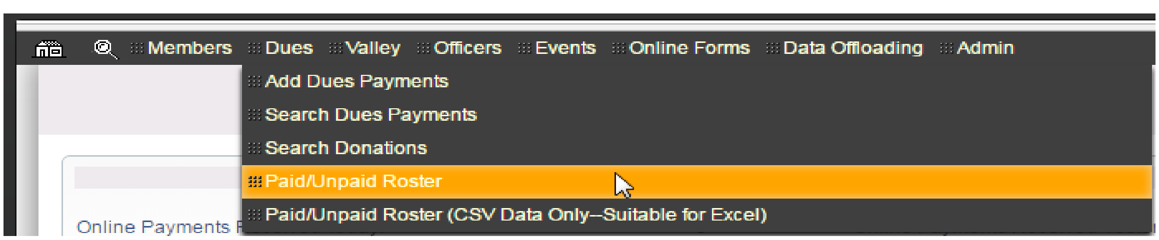
The **Paid/Unpaid Roster** is a predefined report of the current dues status for every member in your Valley. This roster is a point-in-time report—That is, it displays the dues status of the members at the time you view the report.

You have two Paid/Unpaid Report Options: pdf document and Excel spreadsheet.

5.8A PAID/UNPAID ROSTER AS A PDF DOCUMENT

A pdf document is a static report that cannot be sorted. What you see is what you get.

1. To view the report, click the Paid/Unpaid Roster option on the Dues menu.



2. Leave the report output format set to **Adobe Acrobat File**.

Paid/Unpaid Roster

Paid/Unpaid Roster

Select Parameters for this Report

Output my report formatted as: Adobe Acrobat File

< Back | Run Report

3. Click **Run Report**. The report is displayed in up to three sections: Deceased Life Member Roster, Paid Roster and Unpaid Roster,

Here is a sample page from the Deceased Life Member Roster

Valley of Charlotte / Orient of North Carolina
Deceased Life Member Roster (Perpetual)

Page 1 of 62

MEMBER NAME	MEMBER NUMBER	S C	D C	CONTRIBUTIONS BOX 1	BOX 2	BOX 3	AMOUNT DUE HISTORY PAST DUE	CURRENT	TOTAL	PAYMENT HISTORY Y-T-D	LAST	DATE
Arkwright, Peter	000154500	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Bates, William Floyd	007882418	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	650.00	05/09/2008
Bolick, Neal Clarence	000549865	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	09/08/2010
Bowers, William Crowell	000596999	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	65.00	10/06/2006
Brown, Earle Porter	000719476	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	325.00	10/02/2008
Cansler, John Henry, Jr	000915470	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Here is a sample of a page from the Paid Roster. This roster includes paid Life Members (Dues code E) and 50-Year Life Members (Dues code L).

Valley of Charlotte / Orient of North Carolina
Paid Roster

Page 3 of 62

MEMBER NAME	MEMBER NUMBER	S C	D C	CONTRIBUTIONS BOX 1	BOX 2	BOX 3	AMOUNT DUE HISTORY PAST DUE	CURRENT	TOTAL	PAYMENT HISTORY Y-T-D	LAST	DATE
Abernathy, Donald Kendrick	008131831			0.00	0.00	0.00	0.00	0.00	0.00	110.00	110.00	09/14/2016
Abernathy, Jacob Ray, Jr	010364021			0.00	0.00	0.00	0.00	0.00	0.00	110.00	110.00	10/07/2016
Abernathy, James Edward	006986459			0.00	0.00	0.00	0.00	0.00	0.00	110.00	110.00	09/14/2016
Alterizio, Philip , Jr	000092619	L		0.00	0.00	0.00	0.00	0.00	0.00	0.00	20.00	10/25/2010
Altom, Kenneth K, Jr	000093914			0.00	0.00	0.00	0.00	0.00	0.00	110.00	110.00	10/14/2016
Archer, William Mack	011112525	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	650.00	12/03/2008

Here is a sample page from the Unpaid Roster.

12/02/2016
Page 35 of 62

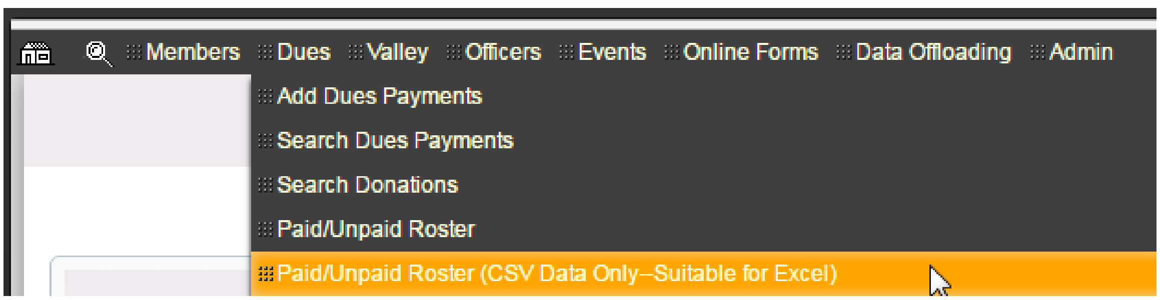
Valley of Charlotte / Orient of North Carolina
Unpaid Roster

MEMBER	MEMBER	S	D	------- CONTRIBUTIONS -------			-------- AMOUNT DUE HISTORY --------			-------- PAYMENT HISTORY --------		
NAME	NUMBER	C	C	BOX 1	BOX 2	BOX 3	PAST DUE	CURRENT	TOTAL	Y - T - D	LAST	DATE
Bingham, Johnny Allan	011151185			0.00	0.00	0.00	0.00	110.00	110.00	0.00	0.00	
Binnick, Warren Stewart	006986574			0.00	0.00	0.00	0.00	110.00	110.00	0.00	110.00	02/11/2016
Bisesti, Robert	011145443			0.00	0.00	0.00	0.00	110.00	110.00	0.00	110.00	12/01/2015
Black, David Jackson	007301310			0.00	0.00	0.00	110.00	110.00	220.00	0.00	110.00	12/19/2014

5.8B PAID/UNPAID ROSTER AS AN EXCEL SPREADSHEET

The Excel version of the Paid/Unpaid Roster is a display of the “raw” dues data that goes into the predefined pdf version of the Paid/Unpaid Roster. Unlike the pdf version, the Excel version will allow you to move columns and sort data. As with the pdf version, the Excel version is a point-in-time report. It displays the dues data for each member as it exists at the time you run the report.

1. To view the Paid/Unpaid Roster as an Excel spreadsheet, click Dues and choose Paid/Unpaid Roster (CSV Data Only-Suitable for Excel).



2. The Excel report displays. There are no sections to this report. You can manipulate the report as you see fit.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	PersonID	Prefix	FirstName	PrefFirstN	MiddleNa	LastName	LineageLa	FullName	Suffix	Statemen	DuesCode	LastPayDate	LastDuesE	Year2Amc	Year1Amc	CurrentAr	PaidYTD	LastPayAn	Box1Amo	Box2An
2	154500		Peter	Peter		Arkwright		Peter Arkwright		E				0	0	0	0	0	0	
3	7882418		William	William	Floyd	Bates		William F Bates		E		5/9/2008 0:00		0	0	0	0	650	0	
4	549865		Neal	Neal	Clarence	Bolick		Neal C Bolick		E		9/8/2010 0:00		0	0	0	0	0	0	
5	596999		William	William	Crowell	Bowers		William C Bowers		E		10/6/2006 0:00		0	0	0	0	65	0	
6	719476		Earle	Earle	Porter	Brown		Earle P Brown		E		10/2/2008 0:00		0	0	0	0	325	0	
7	915470		John	John	Henry	Cansler		John H Ca	Jr	E				0	0	0	0	0	0	
8	8076754		Robert	Robert	Nixon	Cuthrell		Robert N Cuthrell		E		11/18/2013 0:00		0	0	0	0	0	0	

CHAPTER 6: CHARITABLE DONATIONS

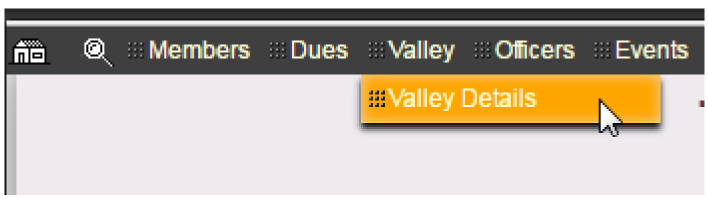
Valleys can create as many **Charitable Donation Funds** as needed and can choose up to three of those funds to print on member dues notices. These **Dues Notices Funds** appear on the dues notices that you print using Sentinel. They also appear on the dues notices mailed by the Supreme Council on the Valley's behalf (Valley Billing System).

The following sections will show you how to create new funds, edit existing funds, and assign up to three funds to be displayed on dues notices.

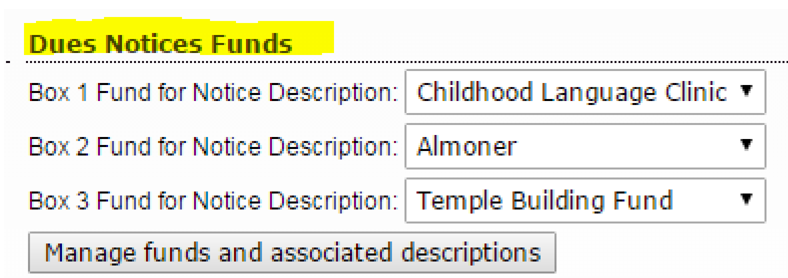
6.1 CREATE NEW CHARITABLE FUNDS

The **Dues Notices Funds** section displays on the **Valley** page in Sentinel. You will also create and manage funds on the **Valley** page. Your existing charitable donation funds are already displayed in Sentinel. To locate them, follow these instructions.

1. Hover the mouse pointer over **Valley** on Sentinel's main menu and click on **Valley Details**.



2. On the Valley page, locate **Dues Notices Funds** in the lower right corner of the page. For our example, there are three funds that have been chosen to appear on all dues notices. We will come back to this. For now, let's learn how to create new funds.



3. **Click on Manage funds and associated descriptions** to view the funds setup for your Valley. Your page should resemble the following display depending on how many funds your Valley already has setup.

Below are the funds that have been set up in your valley.

Add Fund

Fund code	Fund name	Notice line 1 description	Notice line 2 description		
Test	Childhood Language Clinic	Tax Deductible	Tax Deductible	Box 1 Assigned	
Test2	Almoner	Not Tax Deductible	Not Tax Deductible	Box 2 Assigned	
Test3	Temple Building Fund	Not Tax Deductible	Not Tax Deductible	Box 3 Assigned	
Test5	Scholarship Fund	Tax Deductible	Tax Deductible	Not used on dues statements	

Reading from left to right the table begins with the Fund Code, Fund name, Notice line 1 description, Notice line 2 description, and the Box 1,2,3 assignment. Notice line 1 and line two descriptions are the messages that will print on the dues notice for the fund. The Box 1, Box 2, Box 3 assignment is the order in which you want those funds to display. Notice that the **Scholarship Fund** is labelled, "Not used on dues statements." Sentinel automatically inserts this description for all funds not selected for the dues notices.

4. Now, let's create a new fund. Click **Add Fund** to display a blank form

Edit Valley Charitable Fund Definition

Save Cancel

Fund Name:

Fund Code:

(10 chars, max. Only letters. No spaces, numbers, special characters, etc.)

Below are the line decriptions that will appear on the dues statements when (and IF) this fund is included as one of the box 1, 2 or 3 funds. If this fund is not selected to appear as a box 1, 2 or 3 fund on the dues statements, these statement lines are not used.

Statement Line 1 Text (30 characters, maximum):

Statement Line 2 Text (30 characters, maximum):

Statement Box Assignment

5. Fill in your information on the form. If you want the fund name and fund messages to appear on the dues notices, use the drop down menu for **Statement Box Assignment** and choose Box 1, 2, or 3. If you are not assigning the fund to a box, leave it blank. Click the **Save** button.

   For this example, we are telling Sentinel that we want the SR Library and Museum fund to appear as Box 3 on the dues notices. Here is the completed form.

Save Cancel

Changes Saved

Fund Name: SR Library and Museum

Fund Code: Lib/Museum

(10 chars, max. Only letters. No spaces, numbers, special characters, etc.)

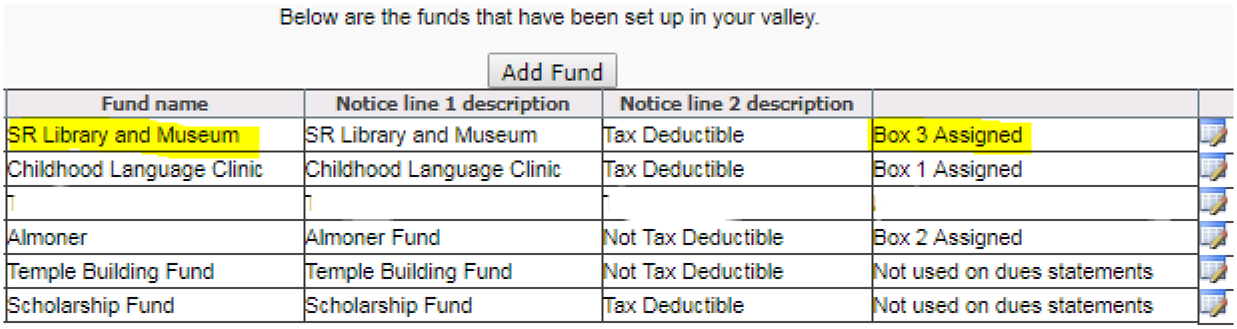
Below are the line decriptions that will appear on the dues statements when (and IF) this fund is included as one of the box 1, 2 or 3 funds. If this fund is not selected to appear as a box 1, 2 or 3 fund on the dues statements, these statement lines are not used.

Statement Line 1 Text (30 characters, maximum): SR Library and Museum

Statement Line 2 Text (30 characters, maximum): Tax Deductible

Statement Box Assignment: Statement Box 3

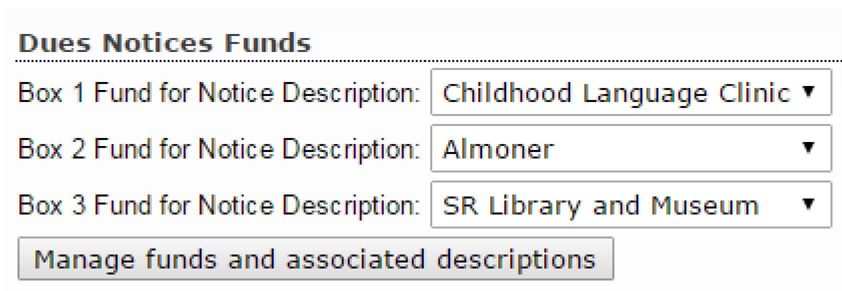
6. To return to the list of funds once you have saved your newly created fund, click the **Cancel** button. This will not cancel your saved entry. It will return you to the previous screen. Your list of funds should now display your new fund at the top of the list with the Box 3 designation. Notice that the Temple Building Fund is no longer assigned to Box 3. Sentinel automatically removed that designation when you assigned the SR Library and Museum to Box 3.


Below are the funds that have been set up in your valley.

Add Fund

Fund name	Notice line 1 description	Notice line 2 description		
SR Library and Museum	SR Library and Museum	Tax Deductible	Box 3 Assigned	
Childhood Language Clinic	Childhood Language Clinic	Tax Deductible	Box 1 Assigned	
Almoner	Almoner Fund	Not Tax Deductible	Box 2 Assigned	
Temple Building Fund	Temple Building Fund	Not Tax Deductible	Not used on dues statements	
Scholarship Fund	Scholarship Fund	Tax Deductible	Not used on dues statements	

Also, Sentinel updated the **Valley** page to display the new Box 3 fund.



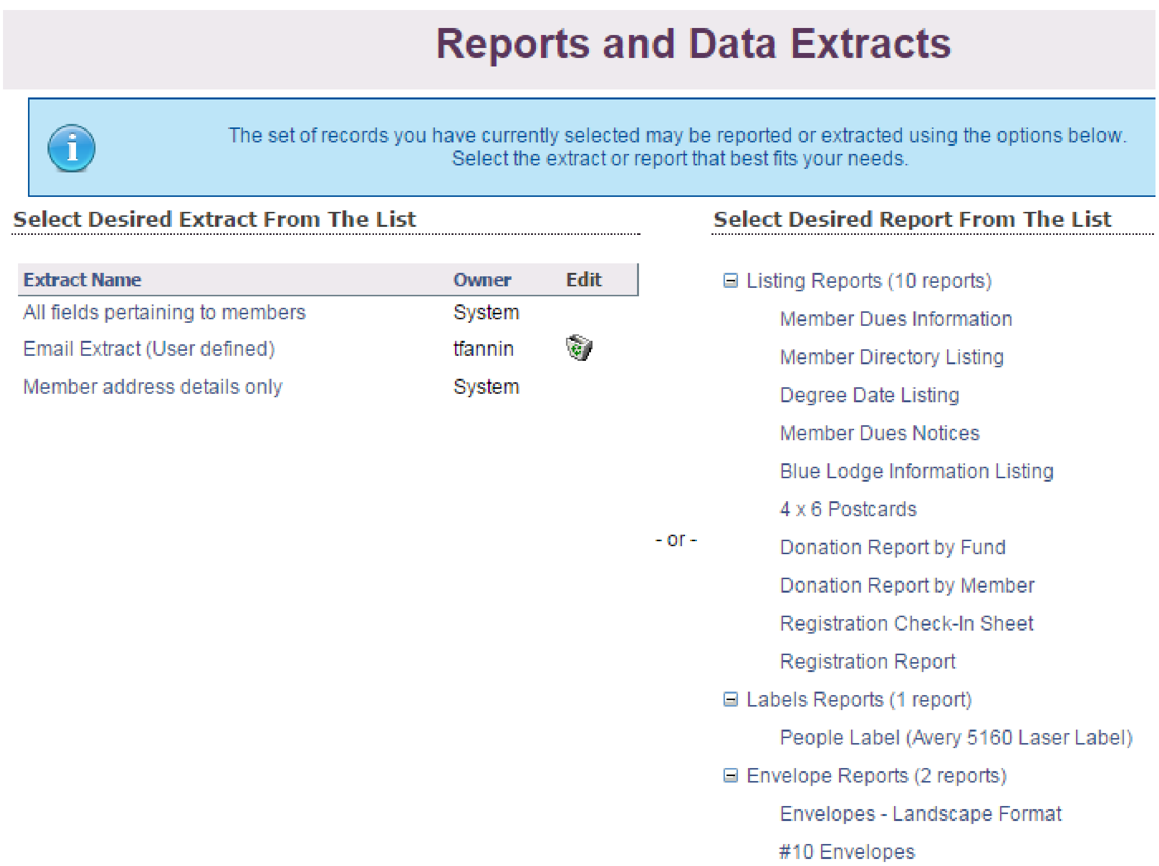
CHAPTER 7: REPORTS AND DATA EXTRACTS

There are two basic ways to create reports in Sentinel: Predefined Reports and Extracts. A predefined (also called "canned" reports) is already built into the system so that all you have to do is click a link to run the report. Examples of predefined reports are Avery 5160 labels, Member Directory Listing, and Donation Report by Fund. In the **Reports and Data Extracts** figure below, the reports under **Select Desired Report from the List** are all predefined reports.

Data Extracts allow the user to build a custom report by choosing the information from a list that you want to include in the report. Once you have created your data extract, you can save it for future use.

In the figure below, the data extract section is shown under **Select Desired Extract from the List**. You will use **All fields pertaining to members** or the shorter list, **Member address details only** to build your data extract. Notice that these two **Extract Names** are owned by the System. This means that they exist for all users and cannot be deleted. The **Email Extract** was created by user tfannin. We know this because Sentinel identifies it as (User defined). Notice that it has the trash can icon to the right. This means that the owner can delete the extract at any time.

The following sections will explain **Predefined Reports and Data Extracts** in more detail.

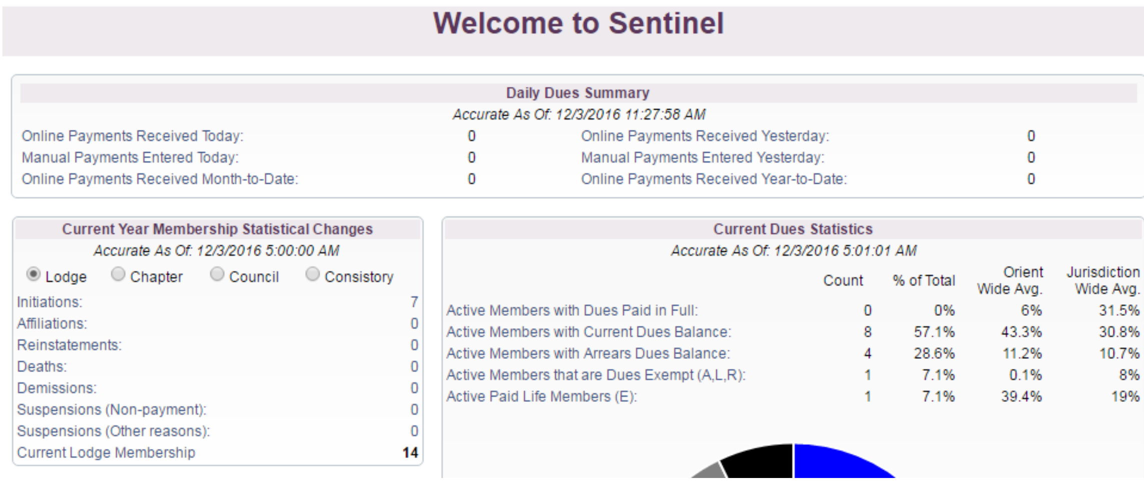


7.1 PREDEFINED REPORTS

Predefined Reports are located in several areas in Sentinel. You will find them on the Welcome to Sentinel Screen (see also Chapter 1), the Members tab under Search Members (see also Chapter 3), and as reporting options for any search that you perform in Sentinel (see also Chapter 3).

7.1A PREDEFINED REPORTS ON THE WELCOME TO SENTINEL SCREEN

Chapter 1 is dedicated to defining predefined reports on the **Welcome to Sentinel Screen**, so it is suggested that you go back and review that Chapter, but here is a reminder screenshot. All of the entries on the screen under **Daily Dues Summary, Current Year Membership Statistical Changes, and Current Dues Statistics** are live links to a report.



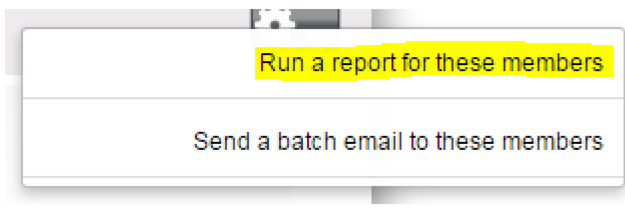
Follow these steps to create your report:

1. For our example, we will search for a list of Initiations under Current Year Membership Statistical Changes.

   Click on **Initiations** to display the list of names.

2. When the results list displays on your screen, click the gear  in the upper right corner.

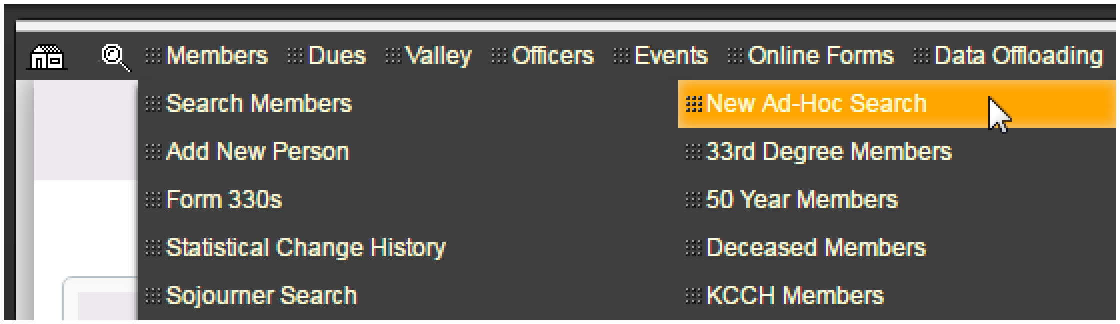
3. Click **Run a report for these members.** Notice also that you can send a batch email to these members by clicking that link.



4. Select any of the predefined reports from the list by clicking on the report name.

7.1A PREDEFINED REPORTS ON THE MEMBERS TAB.

Several **Predefined Reports** are located on the **Members** tab: Ad-Hoc Search Reports, 33rd Degree Members, 50 Year Members, Deceased Members, and KCCH Members. Let's take a look at each report.



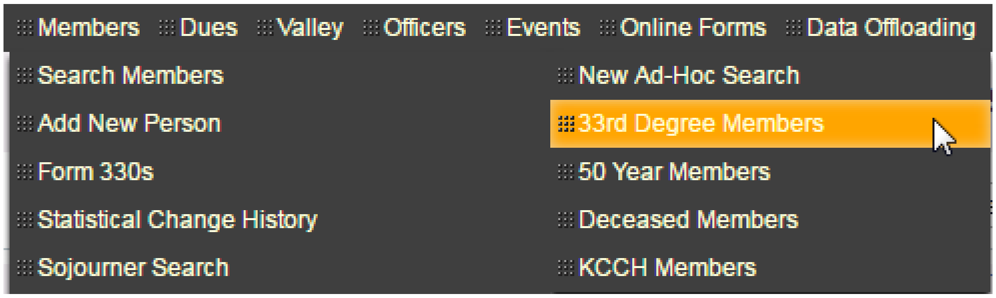
7.2 MEMBER AD-HOC SEARCH REPORTS

Before you can create a **Member Ad-Hoc Search Report**, you must first create a **New Ad-Hoc Search**. Chapter 3 is dedicated entirely to Member Ad-hoc searches. The Chapter also includes instructions for running your reports, so we will not repeat the process here. Therefore, please see Chapter 3 for member searches and member reports.

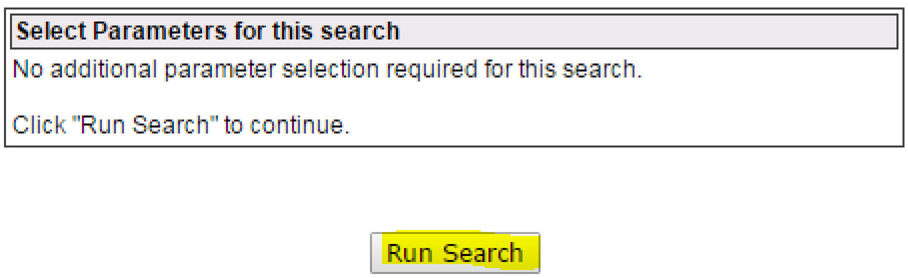
The important point to remember is that reports are created using the gear icon in the upper corner of search results screen. The following is a list of predefined reports available for Member Ad-Hoc Search Results. We will not define each of these reports, as most of them are self-explanatory.

7.2A 33RD DEGREE MEMBER REPORT

1. Click on 33rd Degree Members on the Members tab.



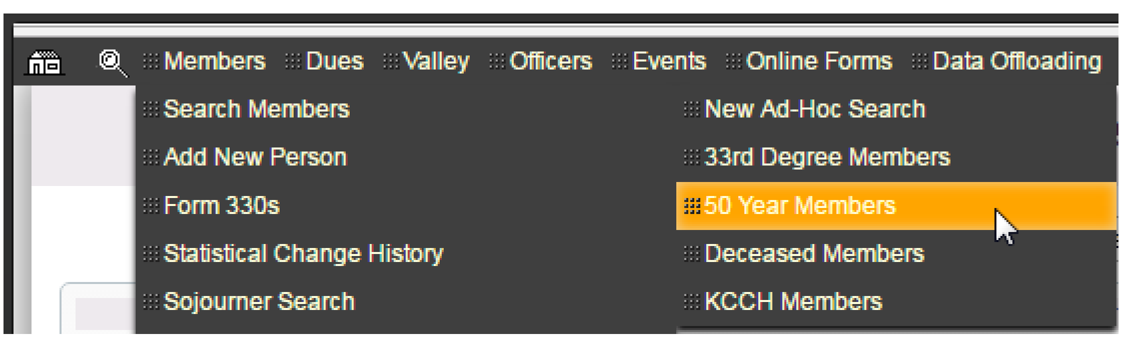
2. Click on **Run Search** to display the results.



3. To create a report, click the gear in the upper right corner. No matter how you run a search, the steps for creating a report are virtually always the same—that is, you click the gear in the upper right corner.

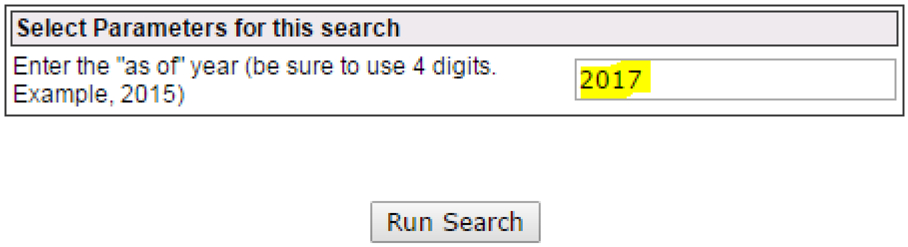
7.2B 50-YEAR MEMBERS REPORT

The **50-Year Members** report is located on the Member tab.

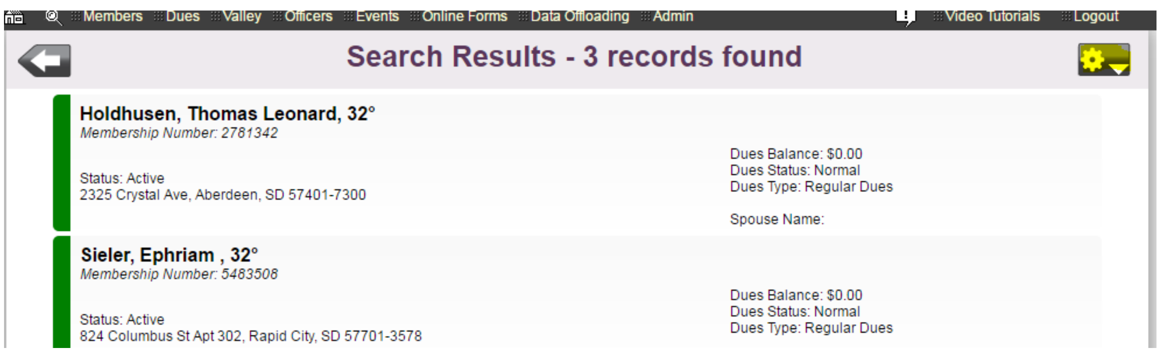


1. Click on **50 Year Members.**

2. Enter the "as of" year. For our example, we are using 2017 to find all active members who are potentially eligible for their 50-year award in 2017. We say "potentially" because Sentinel does not calculate breaks in membership.



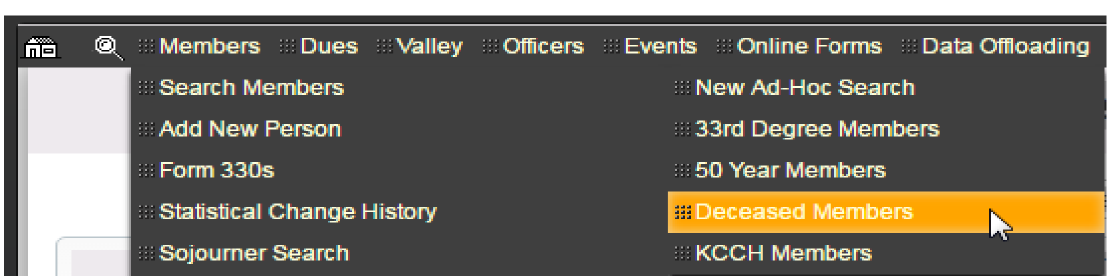
3. Click **Run Search** to display the results.



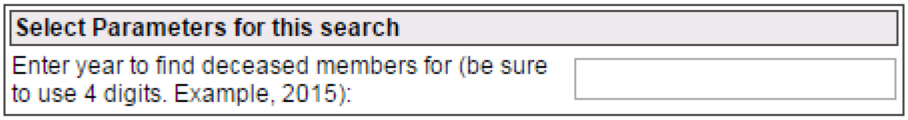
4. To create a report, click the gear  in the upper right corner. No matter how you run a search, the steps for creating a report are virtually always the same—that is, you click the gear in the upper right corner. To complete your report, see steps 2 – 4.

7.2C DECEASED MEMBERS REPORT

The **Deceased Members** report is located on the Members Tab.

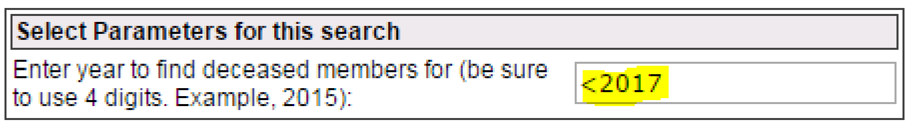


1. Click **Deceased Members** to open the search screen.

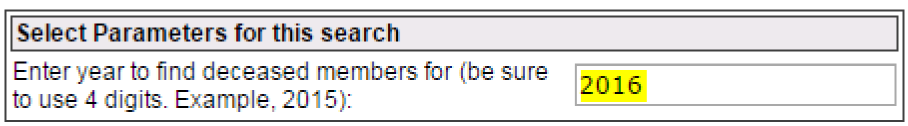


2. There are multiple search criteria that you can enter to create a report of deceased members.

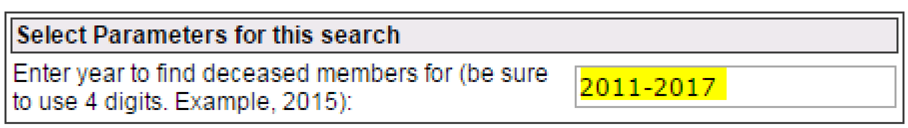
- To find a complete list of all deceased members, enter the date of the next year. For example, if the current year is 2016, enter **<2017** (all dates less than 2017) in the search box.



- To find a list for only one year, enter only that year in the search box.



- To find a list for multiple years, enter the range of years as in 2011-2016.

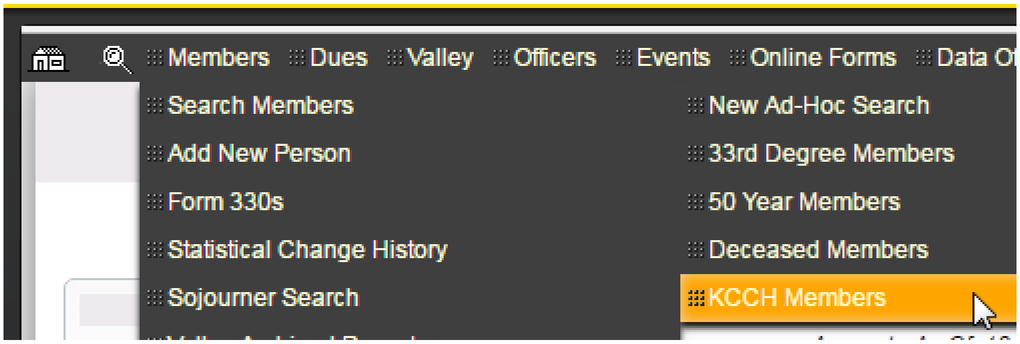


3. Click **Run Search** to display the results of the search.

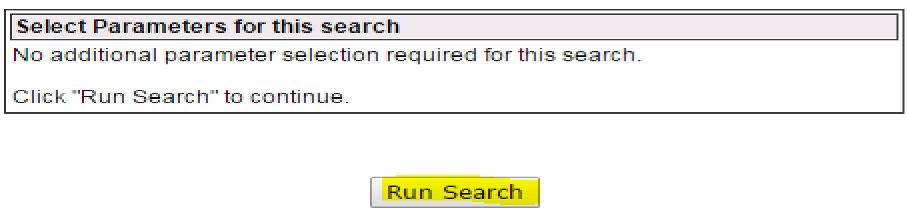
4. To create a report, click the gear  in the upper right corner. No matter how you run a search, the steps for creating a report are virtually always the same—that is, you click the gear in the upper right corner.

7.2D KCCH MEMBERS SEARCH

The **KCCH Members** search is located on the **Members** tab.



1. Click on **KCCH Members** to run the report.
2. Click on **Run Search** to display the results.



3. The results display. To create a report, click the gear in the upper right corner. No matter how you run a search, the steps for creating a report are virtually always the same—that is, you click the gear in the upper right corner.

7.3 DATA EXTRACTS

To review, **Data Extracts** allow the user to build a custom report by choosing the information from a list that you want to include in the report. Once you have created your data extract, you can save it for future use.

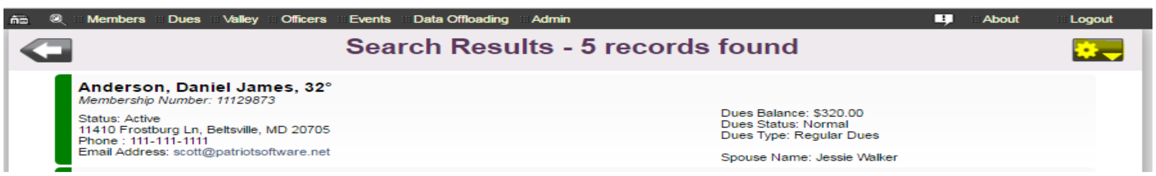
Data Extract Reports are located in several areas in Sentinel. You will find them on the Welcome to Sentinel Screen (see also Chapter 1), the Members tab under Search Members (see also Chapter 3), and as reporting options for any search that you perform in Sentinel (see also Chapter 3).

Once you have completed your search, and the search results are displayed on the screen, you can create several different types of reports.

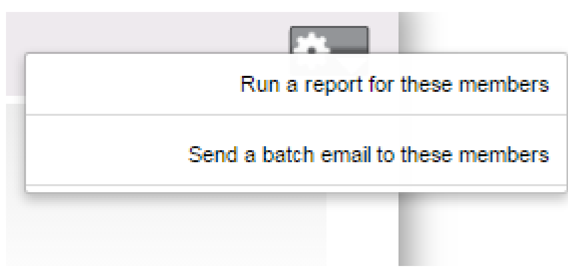
Follow these instructions to perform a **Data Extract:**

1. Create a search so that your results are displayed on the screen. For instructions on creating searches, see Chapter 1, Chapter 3, and Chapter 7:f Predefined Reports.

2. On the **Search Results** screen of any search, click the gear in the upper right corner of the Sentinel screen.

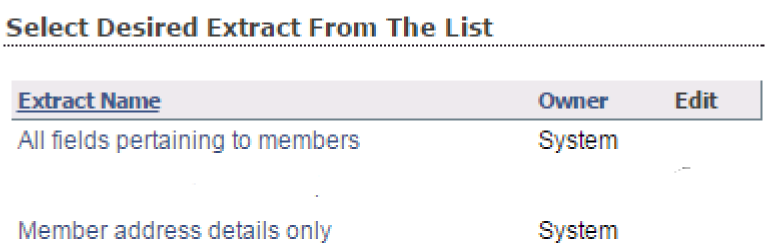


3. Click the option to **Run a report for these members**.



4. The **Reports and Data Extracts** screen will open.

The Data Extract menu displays in the left column. Under Select Desired Extract from the List. You have two options under Select Desired Extract from the List: All fields pertaining to members and Member address details only. Clicking on either of these options will open a screen to display a list of information which will allow you to build your own report by selecting the information topics that you want presented in your report. All fields pertaining to members is a long list which provides every field option in sentinel. Member address details only is a short list which contains name and address information.



To view these lists, click each name to open it. It is up to you to decide which list you will use to build your report. For our example, we will use the shorter list, **Member address details only**. **All fields pertaining to members** works exactly the same way, so what you learn here will also apply to that list.

5. Click on **Member address details only** to open it.

Select Desired Extract From The List

Extract Name	Owner	Edit
All fields pertaining to members	System	
Member address details only	System	

6. The **Data Extract** lists opens. This is the list of fields that you can include in your report. Remember! We are using the short list, for more options, use **All fields pertaining to members**.

For this example we want to create an Excel spreadsheet containing the PPersonID (member ID), first name, last name, suffix, address, and phone number. We want the list to be in alphabetical order by last name/first name.

Select and order fields for your extract

Reset Fields | Delete Checked | Delete Unchecked | Save Template | Next >>

Check/Uncheck All:

Field Sequence	Data Extract Field	Field Delete	Field Order
0	PPersonID		
1	Prefix		
2	FirstName		
3	MiddleName		
4	LastName		
5	Suffix		
6	LastCommaFirstName		
7	PrefAddrLine1		
8	PrefAddrLine2		
9	PrefAddrCity		
10	PrefAddrState		
11	PrefAddrZip		
12	PrefAddrCountry		
13	HomePhone		
14	SentinelID		
15	FullName		

7. Select the **Data Extract Fields** to be included in the spreadsheet by clicking the check box in the **Field Delete** column.

8. Once finished, your list should look like the following display. Notice the checkmarks in the fields that will be included.

If you made a mistake and want to start over, click the **Reset Fields** button.

Reset Fields | Delete Checked | Delete Unchecked | Save Template | Next >>

Check/Uncheck All: ☐

Field Sequence	Data Extract Field	Field Delete	Field Order
0	PPersonID	☑	↓ ↑
1	Prefix	☐	↓ ↑
2	FirstName	☐	↓ ↑
3	MiddleName	☐	↓ ↑
4	LastName	☐	↓ ↑
5	Suffix	☐	↓ ↑
6	LastCommaFirstName	☑	↓ ↑
7	PrefAddrLine1	☑	↓ ↑
8	PrefAddrLine2	☑	↓ ↑
9	PrefAddrCity	☑	↓ ↑
10	PrefAddrState	☑	↓ ↑
11	PrefAddrZip	☑	↓ ↑
12	PrefAddrCountry	☐	↓ ↑
13	HomePhone	☑	↓ ↑
14	SentinelID	☐	↓ ↑
15	FullName	☐	↓ ↑

9. Now you want to remove the unwanted fields. **Click Delete Unchecked** at the top of the window. The unwanted fields are removed.

Select and order fields for your extract

Reset Fields | Delete Checked | Delete Unchecked | Save Template | Next >>

Check/Uncheck All: ☐

Field Sequence	Data Extract Field	Field Delete	Field Order
0	PPersonID	☐	↓ ↑
1	LastCommaFirstName	☐	↓ ↑
2	PrefAddrLine1	☐	↓ ↑
3	PrefAddrLine2	☐	↓ ↑
4	PrefAddrCity	☐	↓ ↑
5	PrefAddrState	☐	↓ ↑
6	PrefAddrZip	☐	↓ ↑
7	HomePhone	☐	↓ ↑

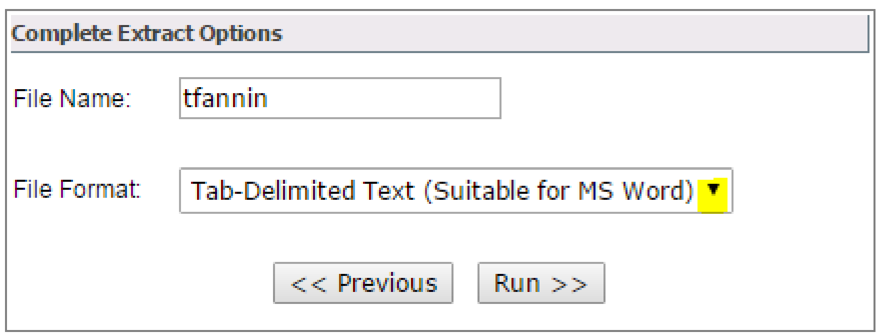
Notice the up-and-down arrows in the Field Order Column. Use these arrows to determine how you want your columns to display in your spreadsheet. For example, if you want the phone number to follow the member's name, click the upward arrow on the phone number row. The **Home Phone** will move up the list. Keep clicking the arrow next to it until it is placed where you want it.

Here is the result of moving **Home Phone** under **LastCommaFirstName:**

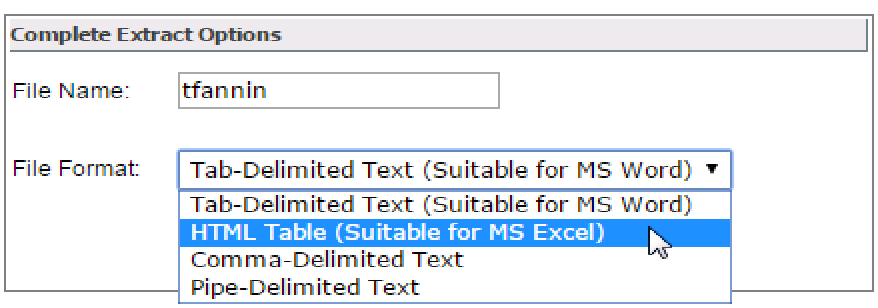
Field Sequence	Data Extract Field	Field Delete	Field Order
0	PPersonID		
1	LastCommaFirstName		
2	HomePhone		
3	PrefAddrLine1		
4	PrefAddrLine2		
5	PrefAddrCity		
6	PrefAddrState		
7	PrefAddrZip		

10. If this is a data extract that you plan to use over and over, you can save it for future use by clicking **Save Template**. For now, we will click **Next** to proceed and come back to saving templates a little later.

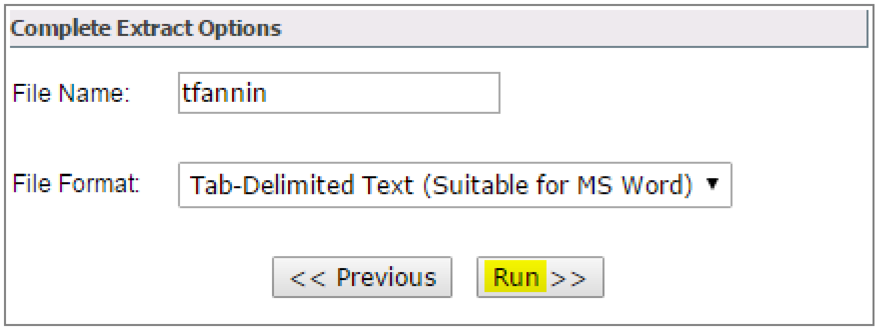
11. Sentinel will ask how you want to output your report.



12. Click the downward arrow to open the **File Format** menu. You have four output options to choose from, but for our example, we will choose HTML Table (Suitable for MS Excel).

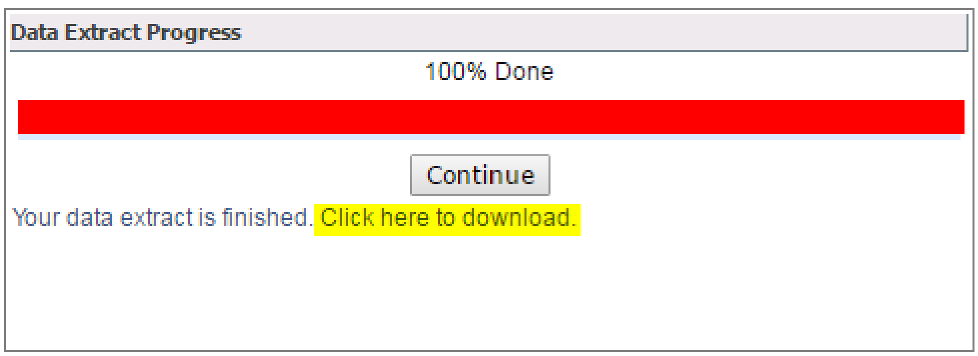


13. Click the **Run** button to create the spreadsheet.



14. You now have two options. If for some reason you do not want to open the report, click the **Continue** button to return to the result list to start over; otherwise, click the **Click here to download** link.

Your file will download according to the method used by your browser. For example, if you are using Google Chrome, the downloaded file will appear in the lower left corner of your screen. You can now open and save the file.

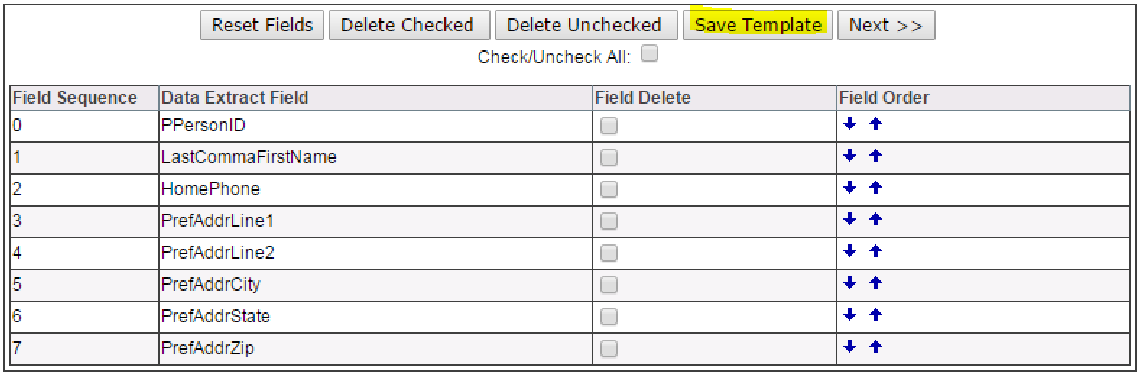


7.3A SAVING A DATA EXTRACT TEMPLATE FOR FUTURE USE

The previous section showed you how to create a Data Extract. If you are unfamiliar with this process, please review the **Data Extract** .

Once you have completed steps 1 – 10 of the previous section and have selected the fields that you want to include in your data extract, you can follow these instructions to save that extract so that you do not have to build it again. Sentinel will store the extract fields for you so that you can use them whenever needed. It is important to point out that Sentinel does not store the results (names) included in the extract; it stores the field names that you want to include in the extract.

Here are the field names that we want to store for future use.

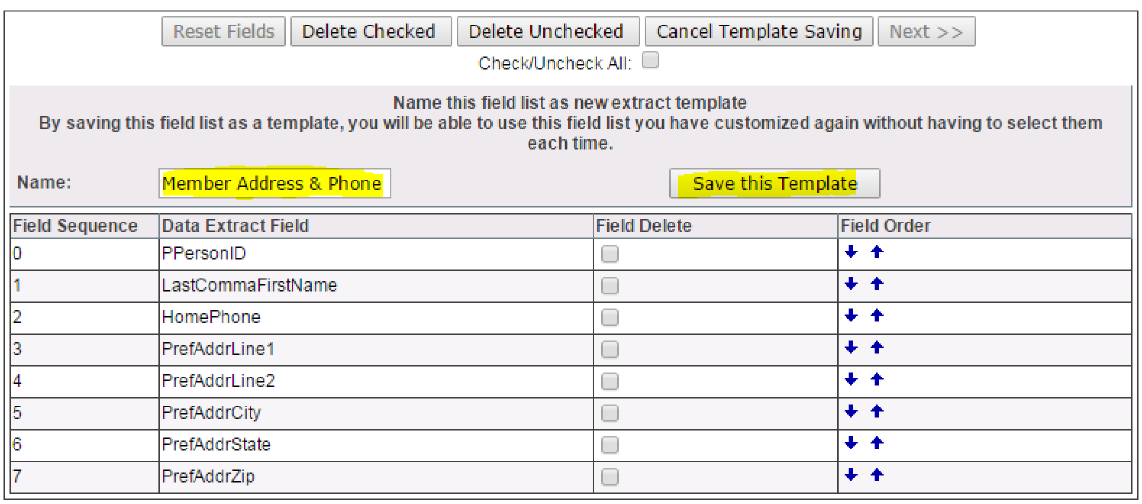

Reset Fields | Delete Checked | Delete Unchecked | Save Template | Next >>

Check/Uncheck All:

Field Sequence	Data Extract Field	Field Delete	Field Order
0	PPersonID		
1	LastCommaFirstName		
2	HomePhone		
3	PrefAddrLine1		
4	PrefAddrLine2		
5	PrefAddrCity		
6	PrefAddrState		
7	PrefAddrZip		

To save this data extract list, follow these instructions:

1. Click the **Save Template** button.
2. Give the data extract a name. For this example, we will use “Member Address & Phone.”
3. Click the **Save Template** button.


Reset Fields | Delete Checked | Delete Unchecked | Cancel Template Saving | Next >>

Check/Uncheck All:

Name this field list as new extract template

By saving this field list as a template, you will be able to use this field list you have customized again without having to select them each time.

Name: Member Address & Phone

Save this Template

Field Sequence	Data Extract Field	Field Delete	Field Order
0	PPersonID		
1	LastCommaFirstName		
2	HomePhone		
3	PrefAddrLine1		
4	PrefAddrLine2		
5	PrefAddrCity		
6	PrefAddrState		
7	PrefAddrZip		

4. The next time you create a search and then click the gear to run a report, your saved extract will appear as an option under **Extract Name**. Notice that it is not owned by the "system." It is owned by user tfannin. The extracts that you create and save will show your username under **Owner**. When you no longer want the extract to appear in the list, click the **trash can** to delete it.

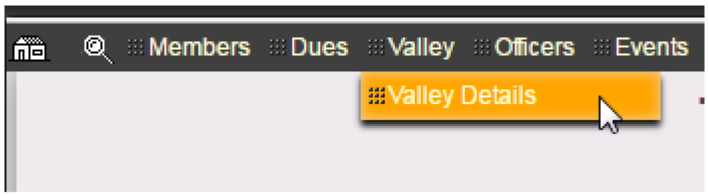
Select Desired Extract From The List

Extract Name	Owner	Edit
All fields pertaining to members	System	
Member Address & Phone (User defined)	tfannin	
Member address details only	System	

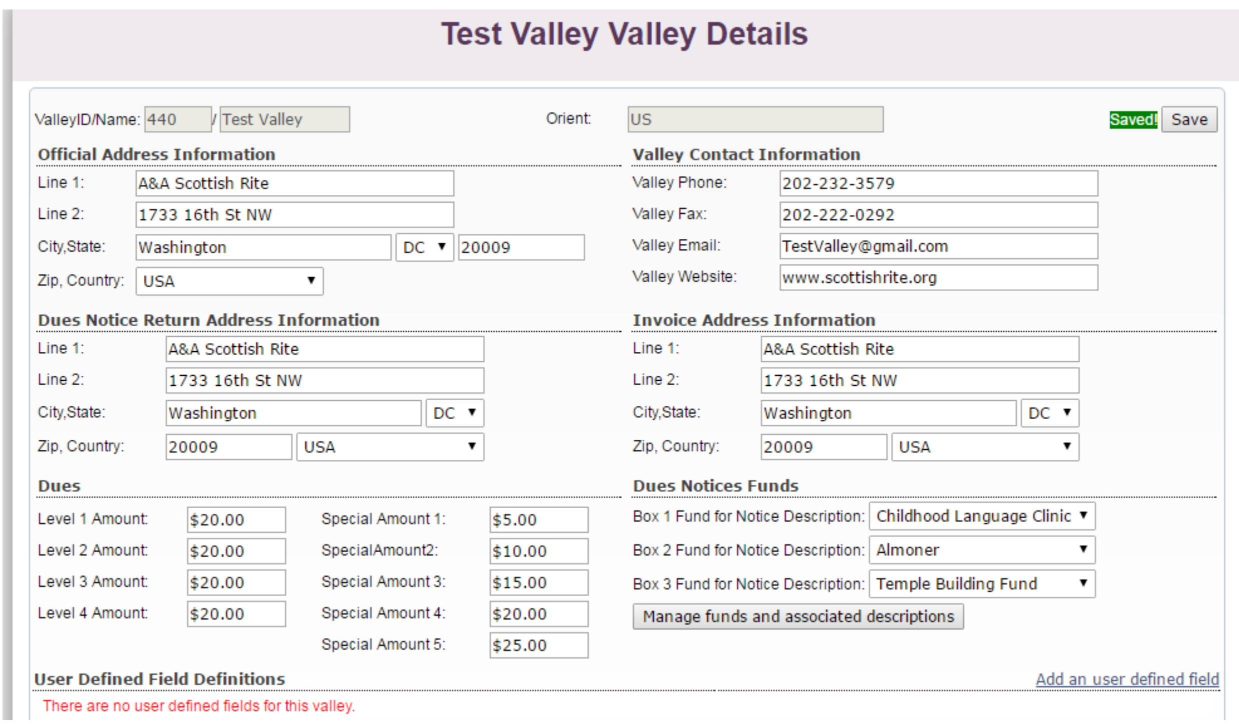
CHAPTER 8: VALLEY

The **Valley** page is where you will store details about your Valley such as contact information and yearly dues. You will also use the Valley page to add and maintain Dues Notice Funds and all other charitable funds (see Chapter 7) and to create User Defined Field Definitions (See Chapter 8).

The **Valley** tab is located on the main Sentinel menu bar. Hover the mouse pointer over the **Valley** heading to open the menu. There is only one option on the Valley menu: **Valley Details.**



Click **Valley Details** to display your Valleys information.

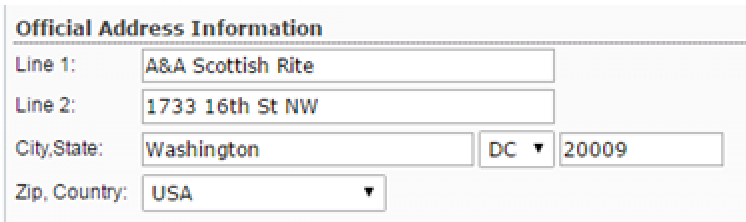


Let's look at each section of the Valley page in more detail.

8.1 OFFICIAL ADDRESS INFORMATION

The **Official** address is your Valley's primary or preferred address. This is the address that the Supreme Council considers to be your main contact address for mail. Always ensure that it is displaying correctly. If you change this address in Sentinel, be sure to contact the Office of the Executive Director at 202-232-3579 to report the address change.

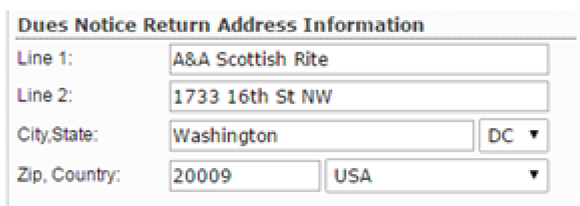
> **IMPORTANT! Report all Valley address changes and other contact information changes to the Supreme Council's Office of the Executive Director by letter, phone, or email.**



8.2 DUES NOTICE RETURN ADDRESS INFORMATION

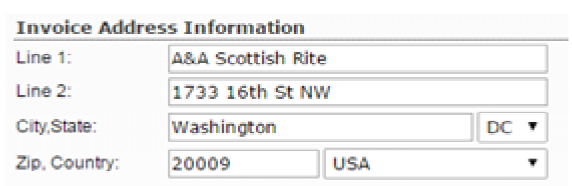
The **Dues Notice Return Address** is the address that your Valley wants printed as the return address on dues notices mailed out to members. For most Valleys, the **Official Address** and **Dues Notice Address** will be the same. However, there are some Valleys that use a Post Office box or other alternate address for dues notices.

Always ensure that this address is current, and as with all contact information, if you change the address, notify the Office of the Executive Director by calling 202-232-3579.



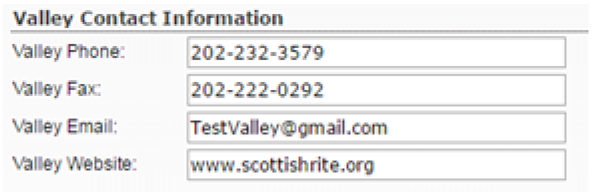
8.3 INVOICE ADDRESS INFORMATION

The Supreme Council's Office of Finance mails all written invoices to the Valleys **Invoice Address.** Always ensure that this address is current. If you change the address, contact the Office of Finance at 202-232-3579.



8.4 VALLEY CONTACT INFORMATION

Use these boxes to record your main phone number, fax number (if applicable), email address, and Valley Website (if applicable). When changing this information, be sure to contact the Office of the Executive Director at 202-232-3579.

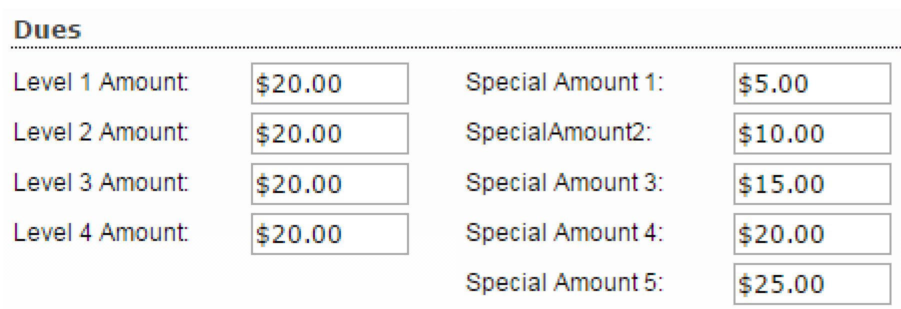


Valley Contact Information

Valley Phone:	202-232-3579
Valley Fax:	202-222-0292
Valley Email:	TestValley@gmail.com
Valley Website:	www.scottishrite.org

8.5 DUES

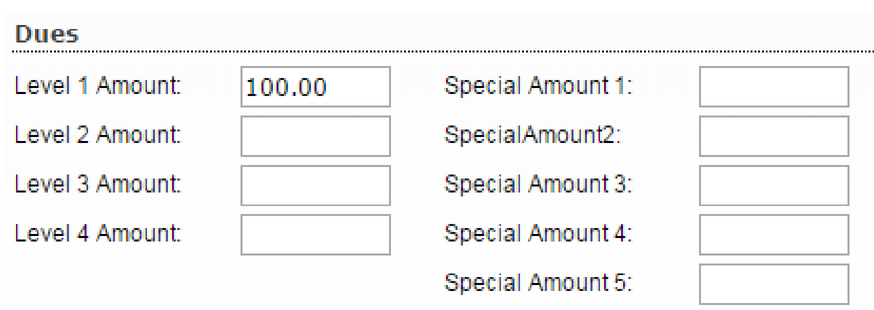
This section displays the Valley's annual dues breakdown in the left column and any "special dues" amounts in the right column.



Dues

Level 1 Amount:	$20.00	Special Amount 1:	$5.00
Level 2 Amount:	$20.00	SpecialAmount2:	$10.00
Level 3 Amount:	$20.00	Special Amount 3:	$15.00
Level 4 Amount:	$20.00	Special Amount 4:	$20.00
		Special Amount 5:	$25.00

Not all Valleys break their dues down by membership Level, and not all Valleys have "special dues" amounts. For those Valleys, their **Dues** information would look more like the following example:



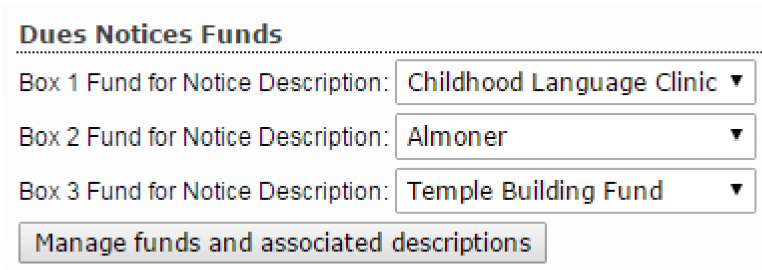
Dues

Level 1 Amount:	100.00	Special Amount 1:	
Level 2 Amount:		SpecialAmount2:	
Level 3 Amount:		Special Amount 3:	
Level 4 Amount:		Special Amount 4:	
		Special Amount 5:	

8.6 DUES NOTICE FUNDS

You can print up to three requests for donations on a dues notice. These donation requests appear on the dues notices that you print using Sentinel. They also appear on the dues notices mailed by the Supreme Council on the Valley's behalf (Valley Billing System).

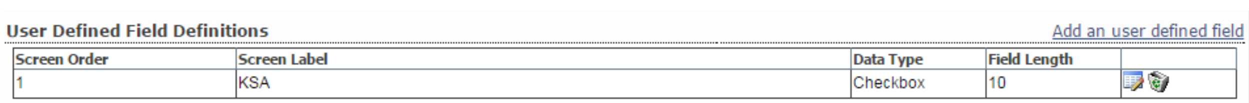
The **Dues Notices Funds** section displays the donation requests that your Valley selects to print on the dues notices.



For more information on managing funds, see Chapter 6.

8.7 USER DEFINED FIELD DEFINITIONS

User Defined Field Definitions allow you to create your own custom information boxes that display on each member's Profile screen. In the previous version of Sentinel, these fields were displayed on the Other Mem Info screen and were limited to ten boxes. In Sentinel, you can create as many custom, labelled boxes as you need.



User Defined Field Definitions — Add an user defined field

Screen Order	Screen Label	Data Type	Field Length	
1	KSA	Checkbox	10	

For instructions on creating and maintaining User Defined Fields, see Chapter 13.

CHAPTER 9: OFFICERS

The Officers' section of Sentinel allows you to record your required Valley officers which at a minimum include the Valley Secretary, Venerable Master, Wise Master, Commander, and Master of Kadosh as they apply to your Valley. These officers are considered "System-wide" officers as they apply to most Valleys. In addition to these "System-Wide" officers, you may create as many office "**Groups**" and "**Office Definitions**" as needed for your Valley. An example of a Group could be your Scholarship Committee. Within this committee, you may have Brothers who hold such Office Definitions as President, Vice President, and Member. The following sections will explain how to manage these groups and offices.

All officers past and present should be maintained in Sentinel. Do not delete officers who are "Not in Office."

9.1 ADD AN OFFICER TO A "SYSTEM-WIDE" OFFICE

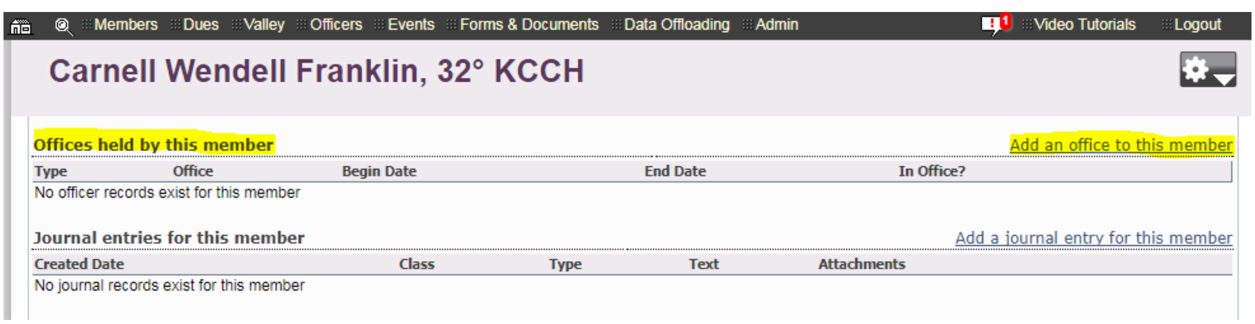
As stated above, a "**System-Wide**" officer is a Valley Secretary, Venerable Master, Wise Master, Commander, or Master of Kadosh. Sentinel has already created these **Office Definitions** for you. Thus, all you have to do is assign a Brother to one of these office positions.

There are two ways to add a System-Wide Officer. You can do this directly on the Brother's **Profile** page or under the **Offices** tab. The following sections will explain both methods. It is up to the user to decide which method is preferable.

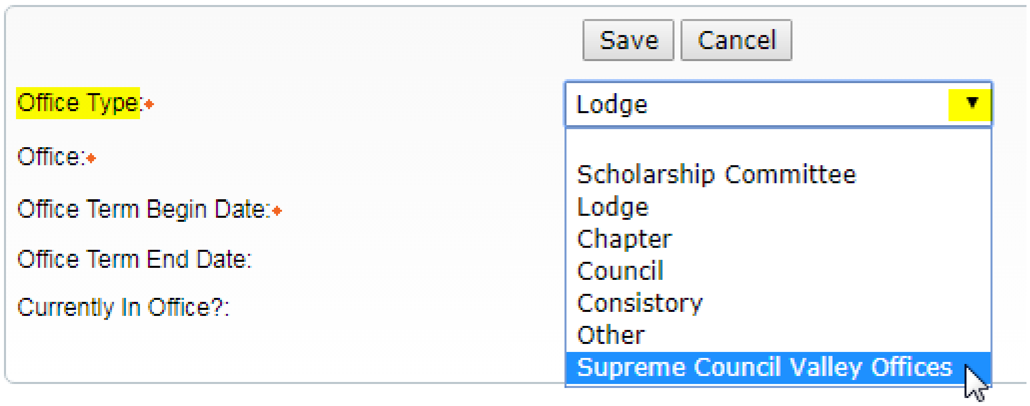
9.1A ADDING AN OFFICER USING THE PROFILE PAGE

You may assign a brother to an officer position by accessing his **Profile** page (member record). For this example, we will assign Carnell Franklin (Test Valley Member) to the office of Venerable Master.

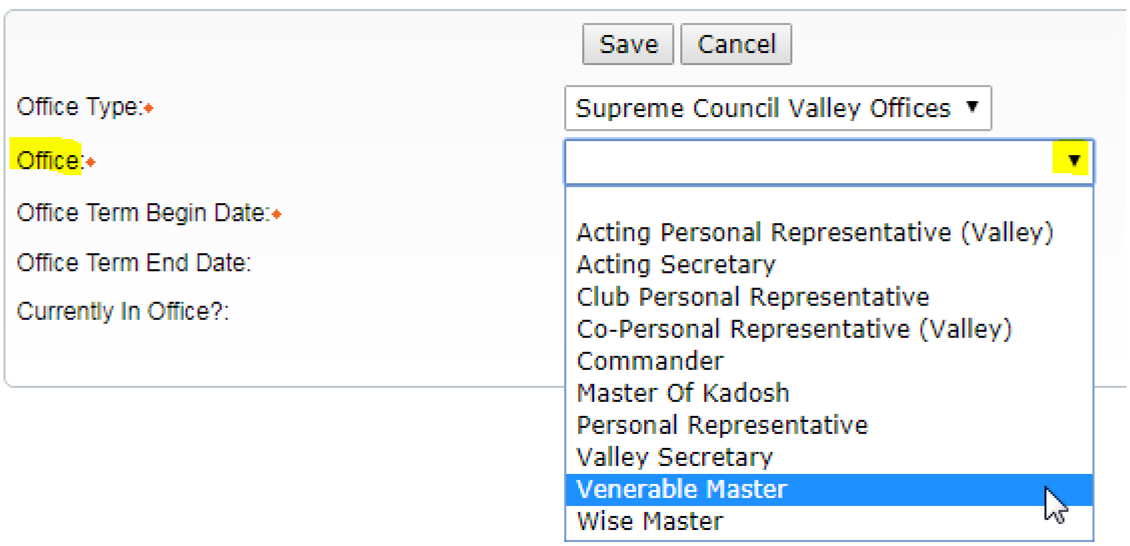
1. On the Brother's Profile page, scroll down until you find the heading that states, "**Offices held by this member**." Click the link at the right **to Add an office to this member**.



2. When the **Officer Add** page appears, click the downward arrow to choose the **Office Type**. Because the Venerable Master is required by the Supreme Council, it is located under Supreme Council Valley offices. **Click on Supreme Council Valley Offices**.

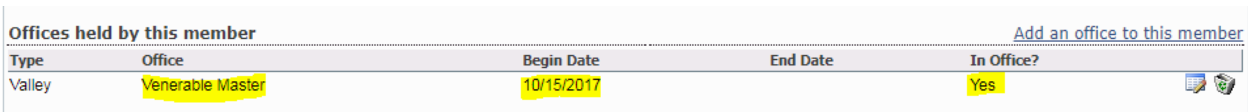


3. When you chose **Supreme Council Valley Offices**, Sentinel loaded the offices assigned to this group. To view them click the downward arrow on the Office line. Scroll down and choose Venerable Master.



4. Complete the form by entering an **Office Term Begin Date**. If you know the **Office Term End Date**, you may enter it, otherwise, leave it blank. If the Brother is currently holding the office, click the **In Office** checkbox. To finish, click the **Save** button.

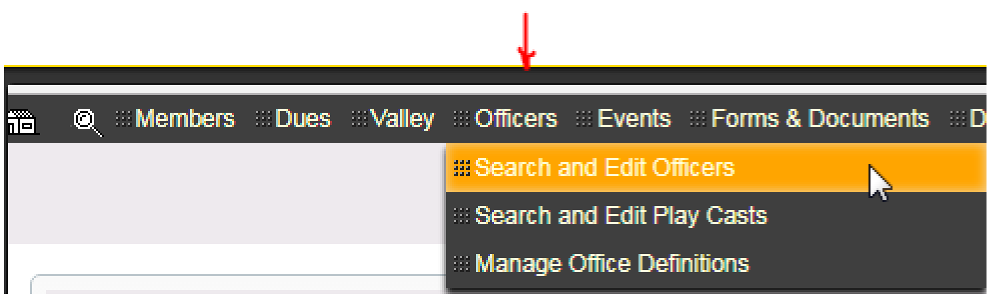
When you return to the Brother's Profile page, the office will display under **Offices held by this member**.



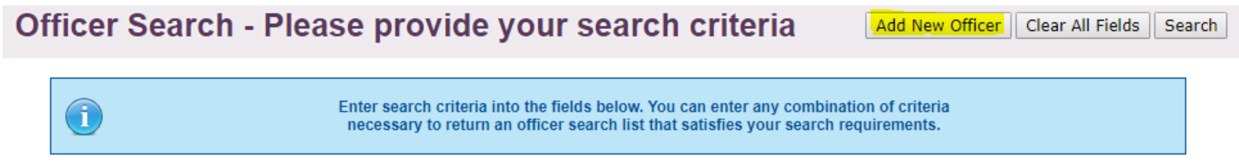
9.1B ADDING AN OFFICER USING THE "OFFICES" MENU

Follow these instructions to add a Brother as an officer using the "Officers" tab on Sentinel's black menu bar.

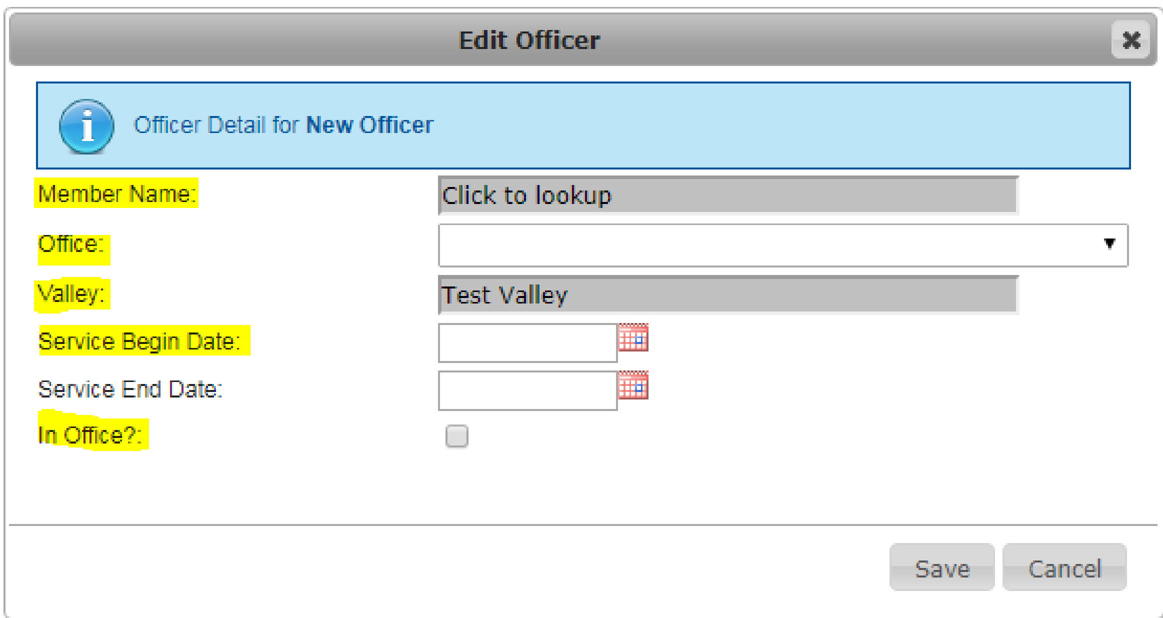
1. Place your mouse pointer over **Members** on the black menu bar and click on **Search and Edit Officers**.



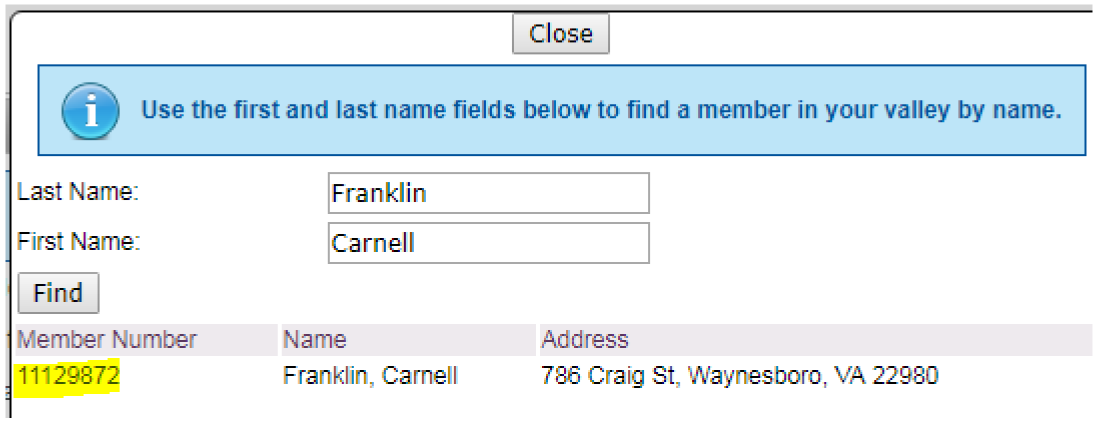
2. Click the **Add New Officer** button.



3. The **Edit Officer** page opens. Don't be confused by the "Edit Officer" heading, you will be adding an officer. You will add your new officer by looking up his name (Click to Lookup) and choosing his office from the dropdown menu (Office). Your Valley will automatically be displayed (Valley). You will enter a **Service Begin Date**. If you know the **Service End Date**, you may enter it, but it is not mandatory. Last, if the Brother is currently filling the officer position, click the **In Office** checkbox .

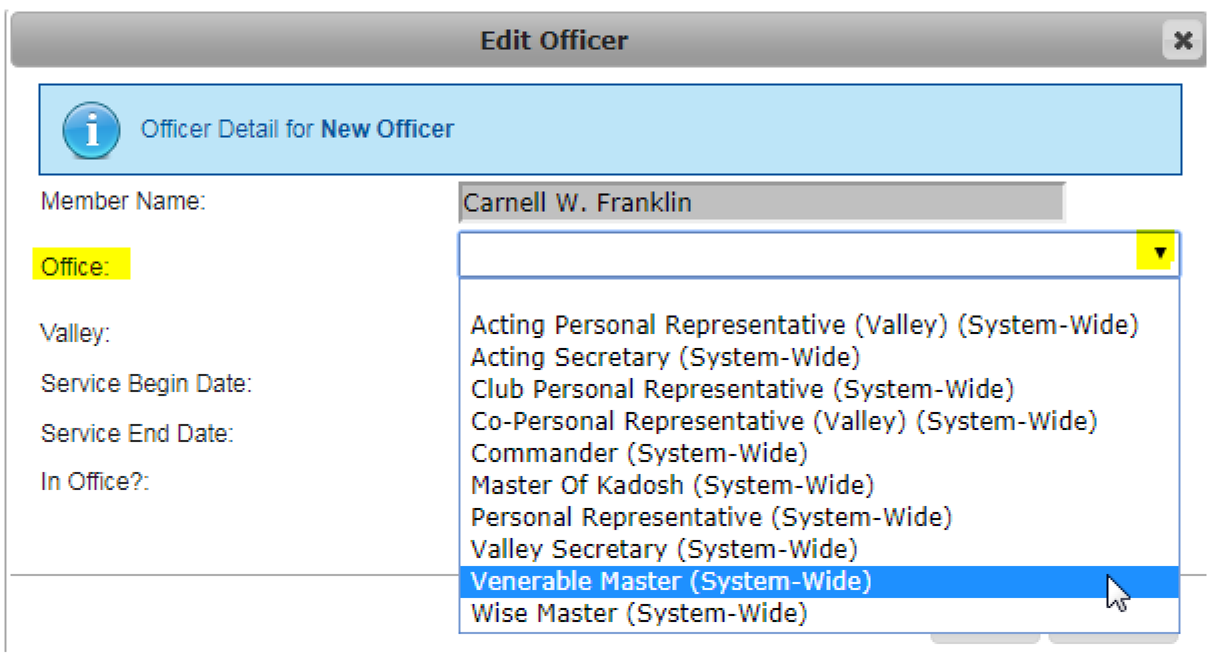


4. Add the Member Name by clicking on the shaded area that says **Click to lookup.** Enter the Brother's Last Name and First Name. Sentinel will search and then display the member. Please note, if you have more than one Brother with the same name entered, both records will display. Choose the correct Brother by clicking on his **Member Number**.



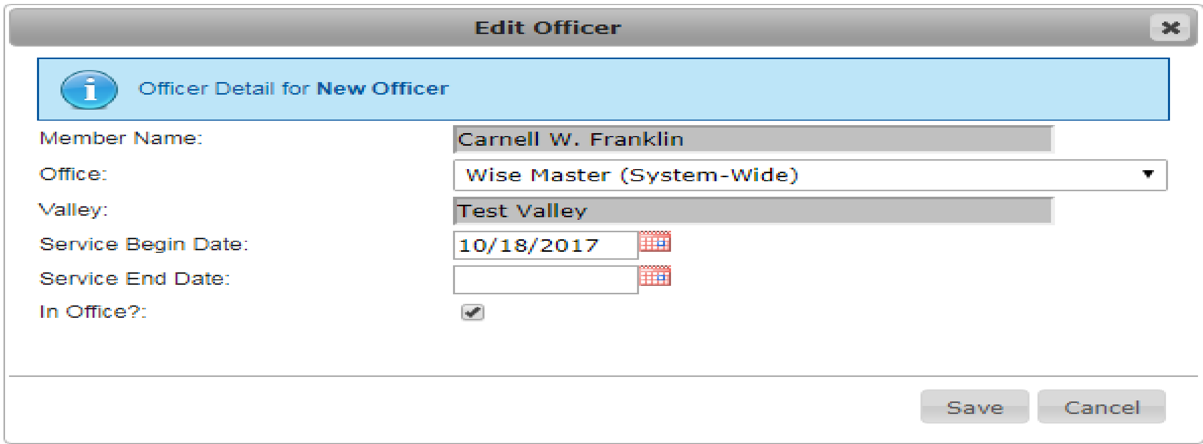
5. When you clicked on the **Member Number** in step four, Sentinel returned to the officer form page and auto-populated the **Member Name** with the Brother's name.

   Next, click the downward arrow on the **Office** line to assign the Brother to an office. The Office menu displays all offices that are System-Wide. For this example, we will assign Carnell Franklin to the office of Venerable Master by highlighting and clicking on that office.

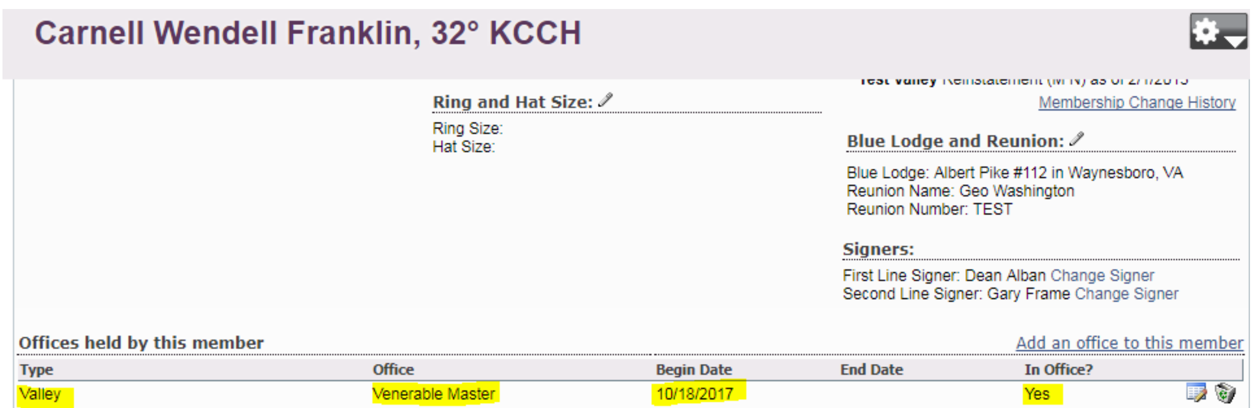


6. Finish by using the popup calendar to enter the **Service Begin Date**. If you know the **Service End Date,** you may enter it. If the Brother is currently serving in the office position, click the **In Office** checkbox.

Click the **Save** button to finish.



When you return to the Brother's Profile (main record), the office will be displayed under **Offices held by this member**.

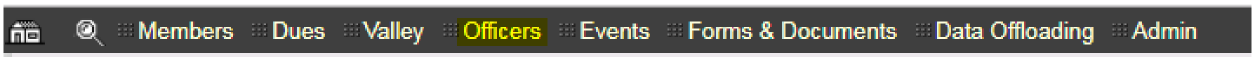


9.2 SEARCH AND EDIT OFFICERS

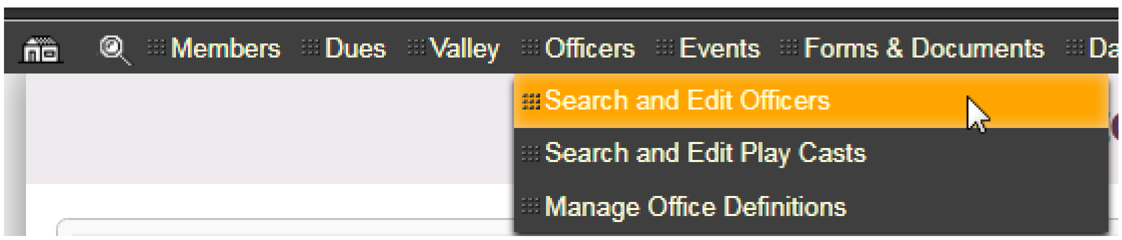
Sentinel records all of the officers that have been entered in Sentinel for your Valley, unless, of course, a Valley user has deleted them. We strongly suggest that you maintain a record of all current officers that are tagged as "In Office" and all past officers that are tagged as "Not in Office" and never delete these records. This will become clearer as we go along. For now, let's find all the officers who are already recorded in your Valley.

9.2A OFFICER SEARCH

The **Officers** tab displays on Sentinel's black menu bar.

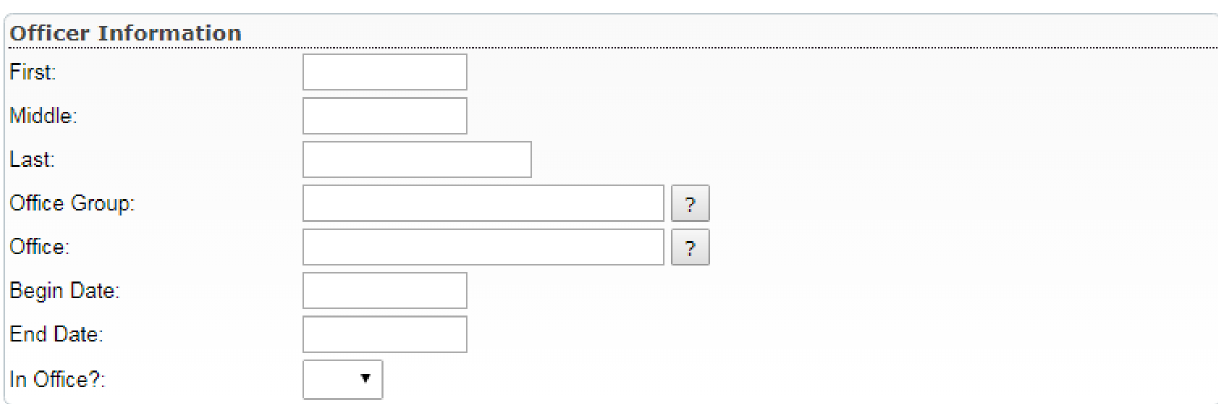


1. Position your mouse pointer on **Officers** on the black menu bar to open the dropdown menu. Left-click on **Search and Edit Officers** to open the search box.

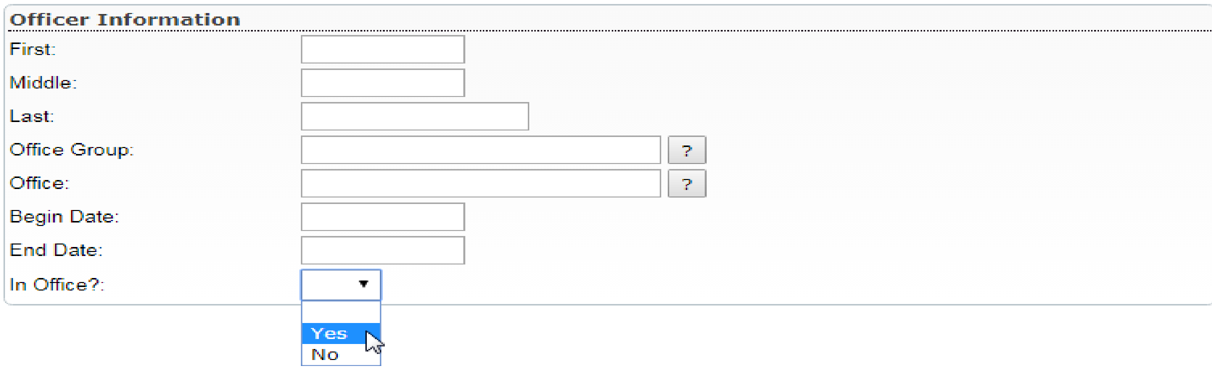


Notice that **Search and Edit Play Casts** is listed in the menu. We will disregard this entry at present and return to it in Chapter 8. Right now we are only concerned with **Search and Edit Officers** and **Manage Office Definitions**.

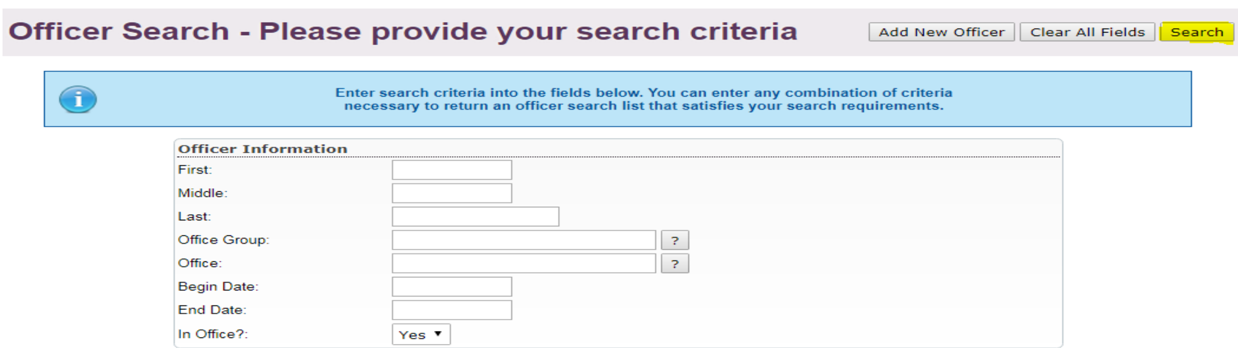
2. The Officer search form will display all available search fields. You may search on a single field or a combination of fields.



3. To display a list of all officers assignments in your Valley who are currently "In Office, on the line labeled **In Office**, click the dropdown menu arrow and left-click on **Yes**.

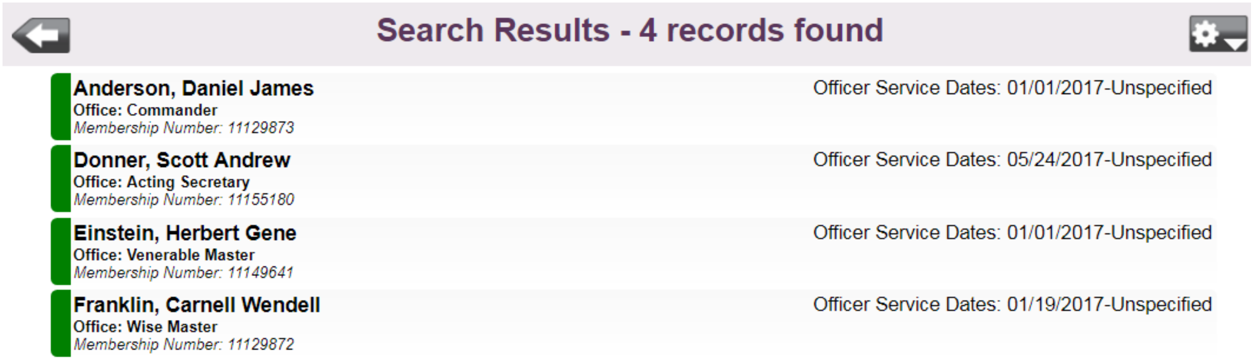


4. To display the results, click the Search button in the upper right corner of the screen.



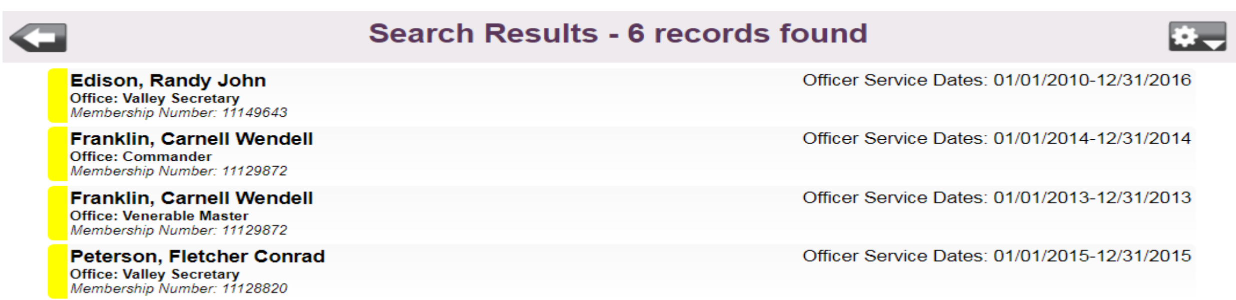
5. The results display. Of course, your list will be different and possibly much longer. The **Officer Service Dates** located to the right of each name indicate when the Brother took office. The end date is "Unspecified" because the Brother still holds the office and the end date is has not been entered.

   Notice that the color coding to the left of each name is green. Green always indicates "active" status in Sentinel.



6. Now, let's find the inactive officers. Choose **No** from the **In Office** dropdown menu and click the **Search** button to display the results.

7. The results display.



The list for officers who are **Not in Office** will show beginning and ending **Officer Services Dates** provided the Valley has updated the records correctly. Also, the color coding to the left of each name is yellow, which is the color Sentinel uses for "inactive" status.

9.2B EDIT OFFICER RECORDS

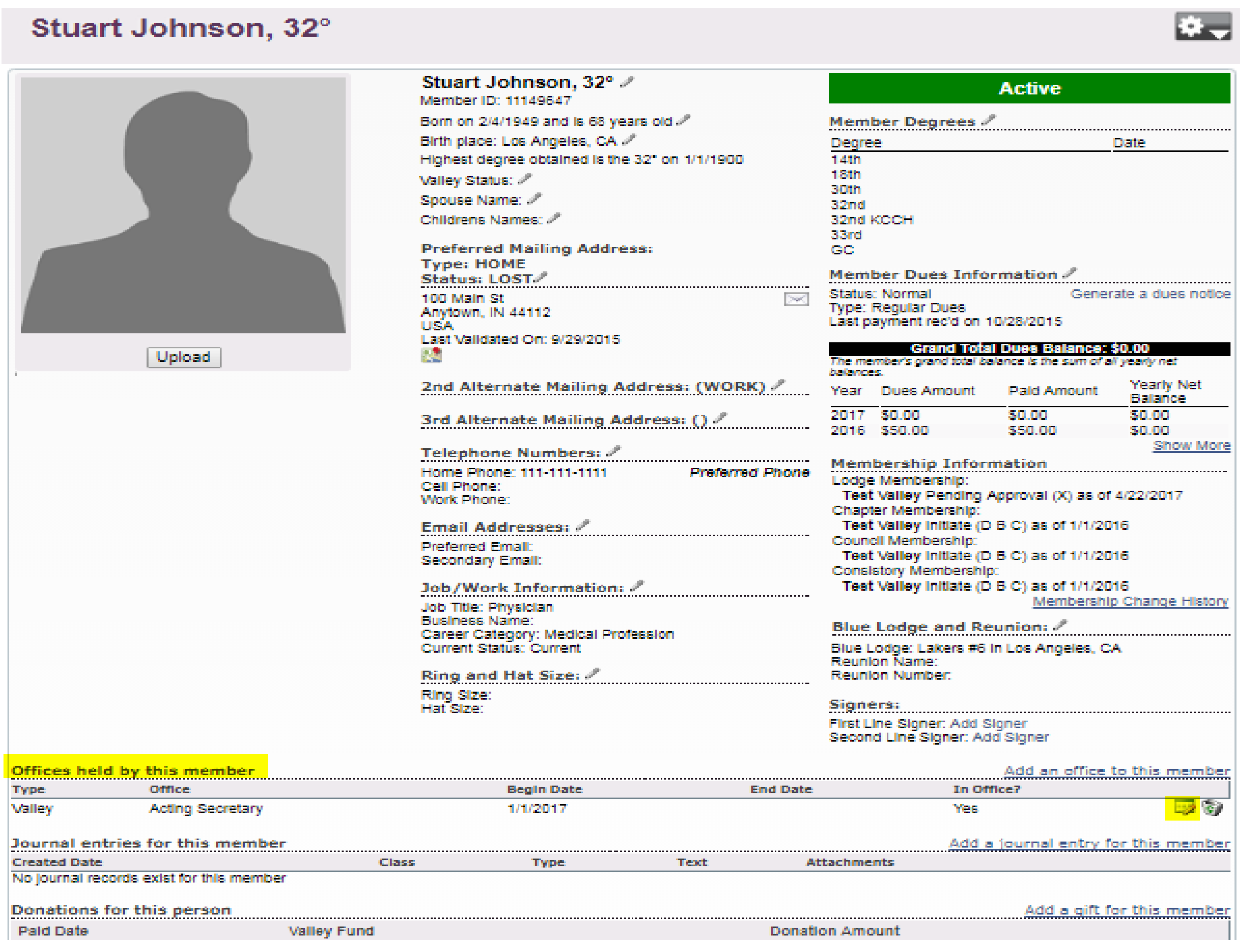
All officer records may be edited. Most common edits include entering beginning and ending **Officer Service Dates** and changing the **In Office** status. It may also be necessary to delete an officer record if an incorrect name was assigned to the office. It may also be necessary to change the “Office” description for a Brother if an incorrect office was entered. This section will explain these procedures.

9.2B.1 Editing Officer Service Dates and In Office Status

Service Dates and **In Office** status may be edited on the Brother’s main record screen called his **Profile** screen.

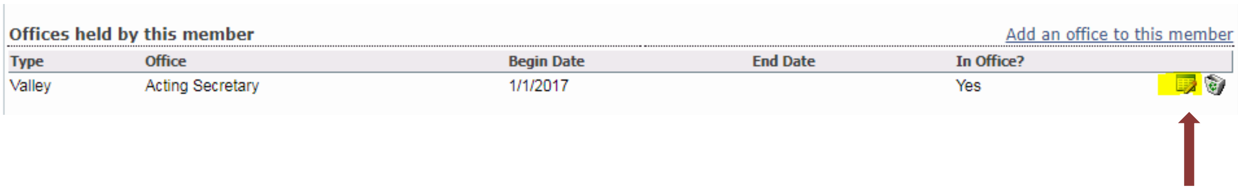
1. Use the Hourglass or New Ad-Hoc Search to access the member’s **Profile** screen (If you need a refresher on member searches, see Chapters 2 and 3).

2. For this example, we will edit the **Services Dates** and **In Office** status of Stu Johnson who was the Acting Secretary, but he no longer holds that office. To make this change, scroll down his Profile screen and find **Offices held by this member**.



3. His entry shows that he holds the office of Acting Secretary, his **Begin Date** was 1/1/2017, and his **In Office** Status is set to "Yes." We want to enter and **End Date** and set his **In Office** status to "No."

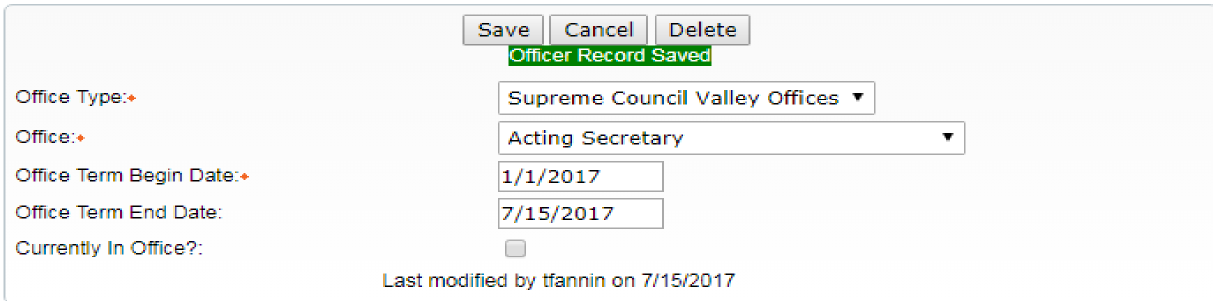
Click on the edit icon to open the edit window).



4. The edit window opens to display the current information.

5. Enter the **Office Term End Date** and uncheck **the Currently in Office** checkbox. Click the **Save** button to finish.

6. Once the record is saved, Sentinel displays Officer Record Saved.



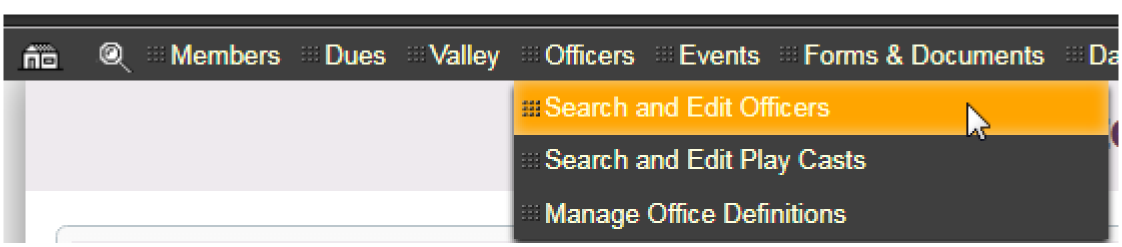
9.2B.2 Editing an Office Position

Valley Secretary, Venerable Master, Chairman, and Member are all examples of "Office" positions. The only time a user should change an Office position is if that position was entered incorrectly. You don't want to overwrite a correct record. For example, if a Brother serves as Venerable Master in 2016 and then becomes the Wise Master in 2017, you will want to retain that 2016 entry and change it to **Not in Office.** Next, you would create a new **In Office** entry for that Brother's 2017 position as Wise Master. Keeping good records will create a history of office holders.

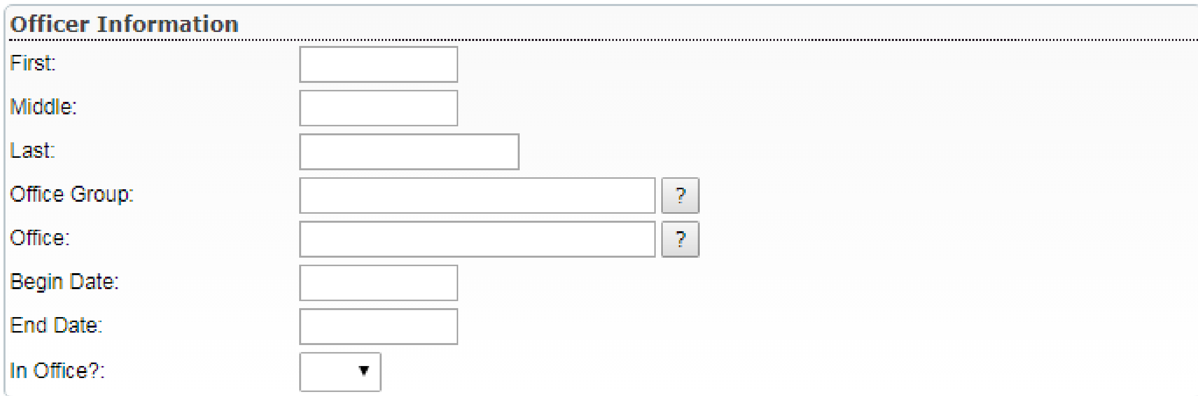
Now, let's edit an **Office** position. John Q, Mason is mistakenly assigned to the office of Venerable Master, but his correct office is Wise Master, you can very easily change his office by performing a simple edit.

In the previous section, we edited an Office on the Brother's Profile screen, but there is another way to edit a record, and that is by performing an **Office** search. Follow these steps.

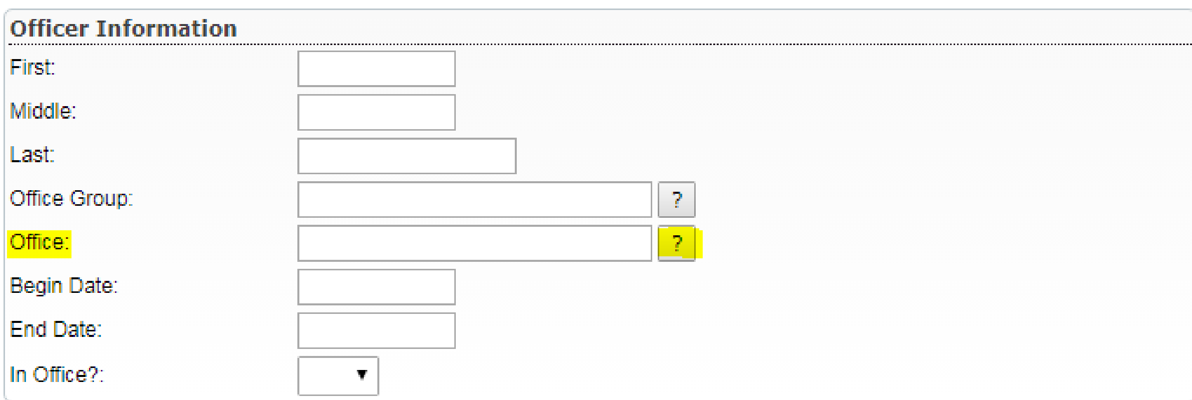
1. On the Offices tab dropdown menu, choose **Search and Edit Officers**.



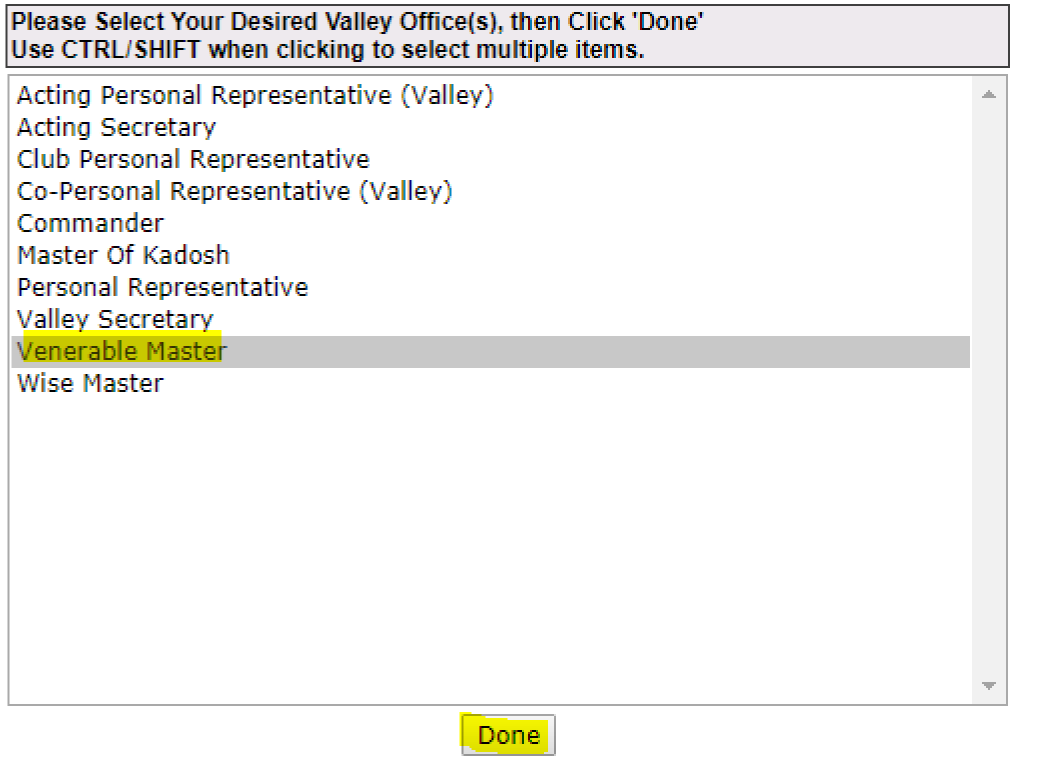
2. The **Office** search window opens.



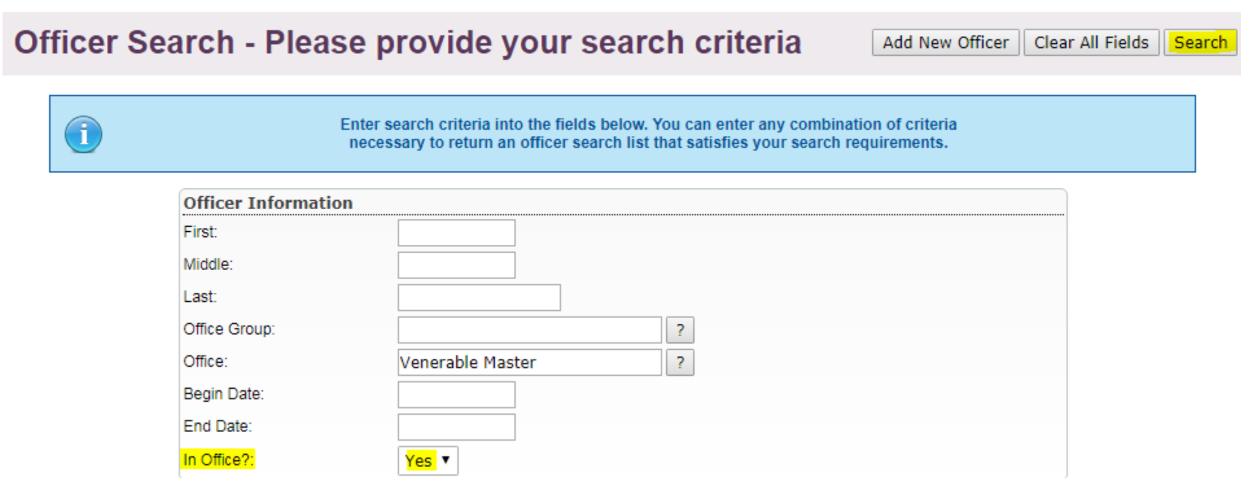
3. You can search using any search box or combine searches. For this example we will search for the office of Venerable Master with an **In Office** status of **Yes**. You can type Venerable Master in the Office box or click the **question mark** on the **Office** line to choose Venerable Master from a list of preloaded offices.



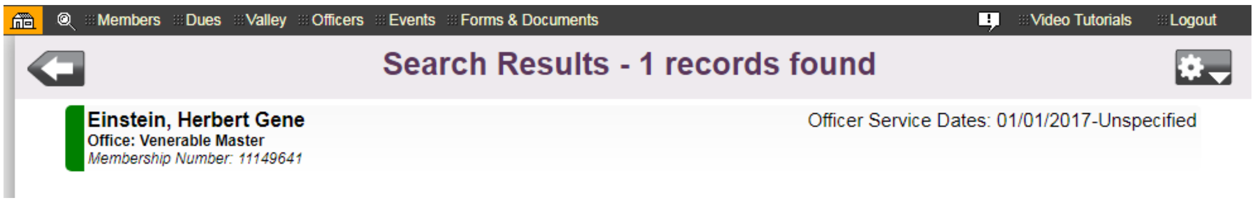
4. If you clicked the question mark, you will see the following list. Highlight Venerable Master and click the **Done** button.



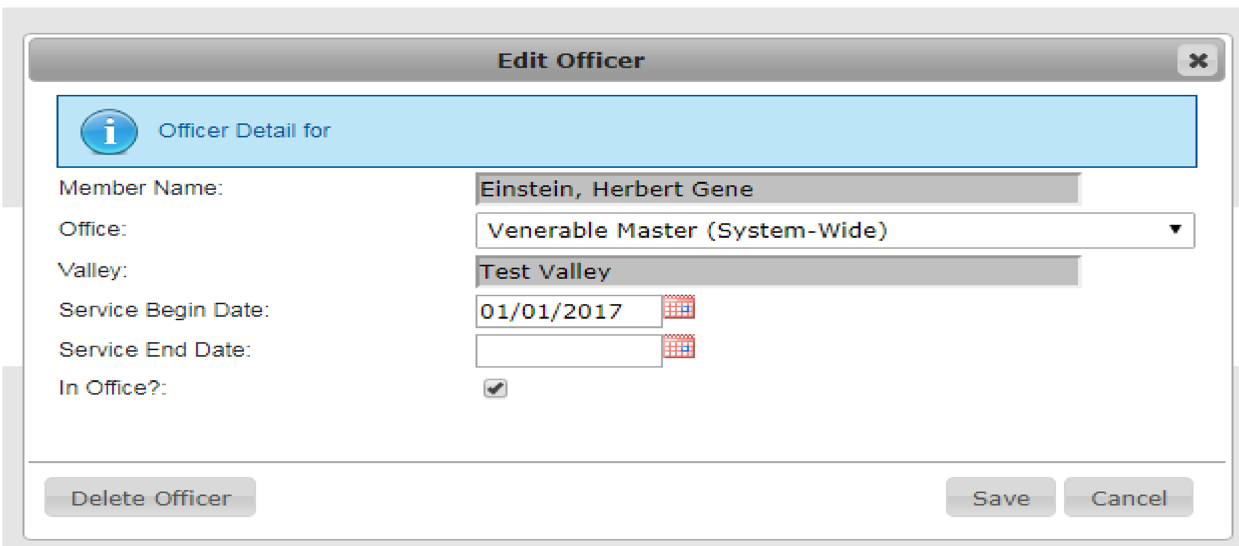
5. The screen was returned with Venerable Master in the Office box. Next, click the dropdown menu on the **In Office** line and select **Yes**. Click the **Search** button.



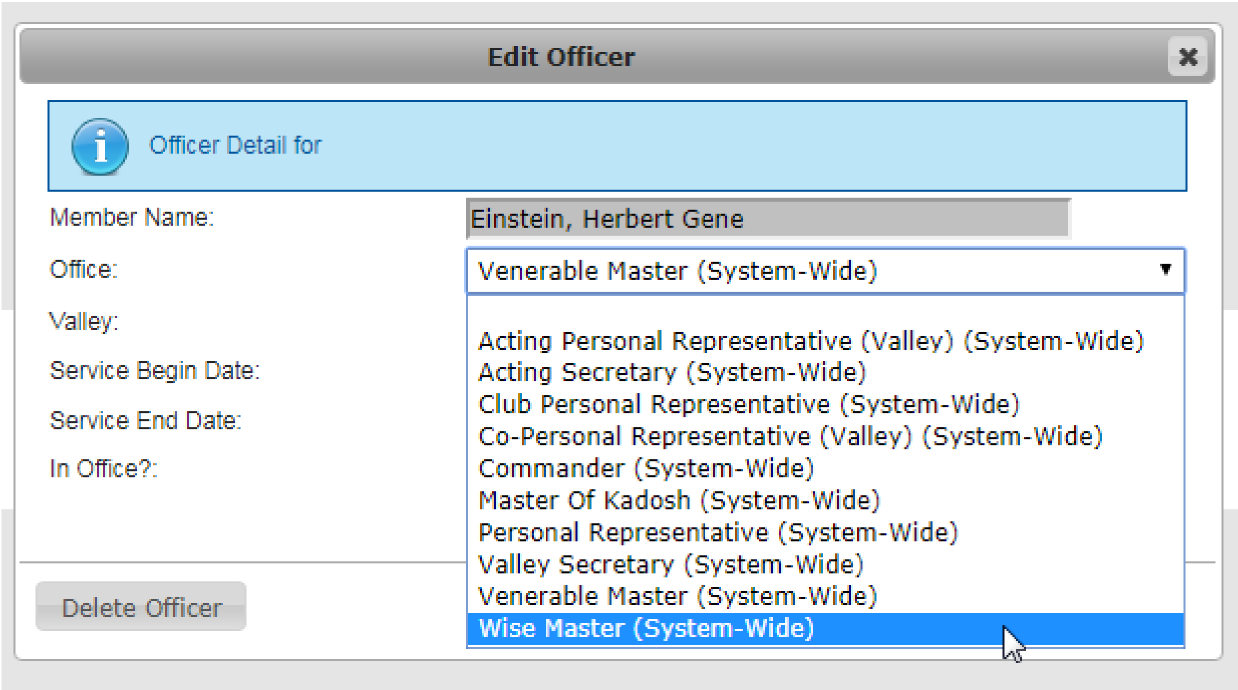
6. Sentinel returns the Venerable Master who is currently in office. Remember! Our goal is to change his incorrectly entered position as Venerable Master to Wise Master. Click on his name to open the edit window.



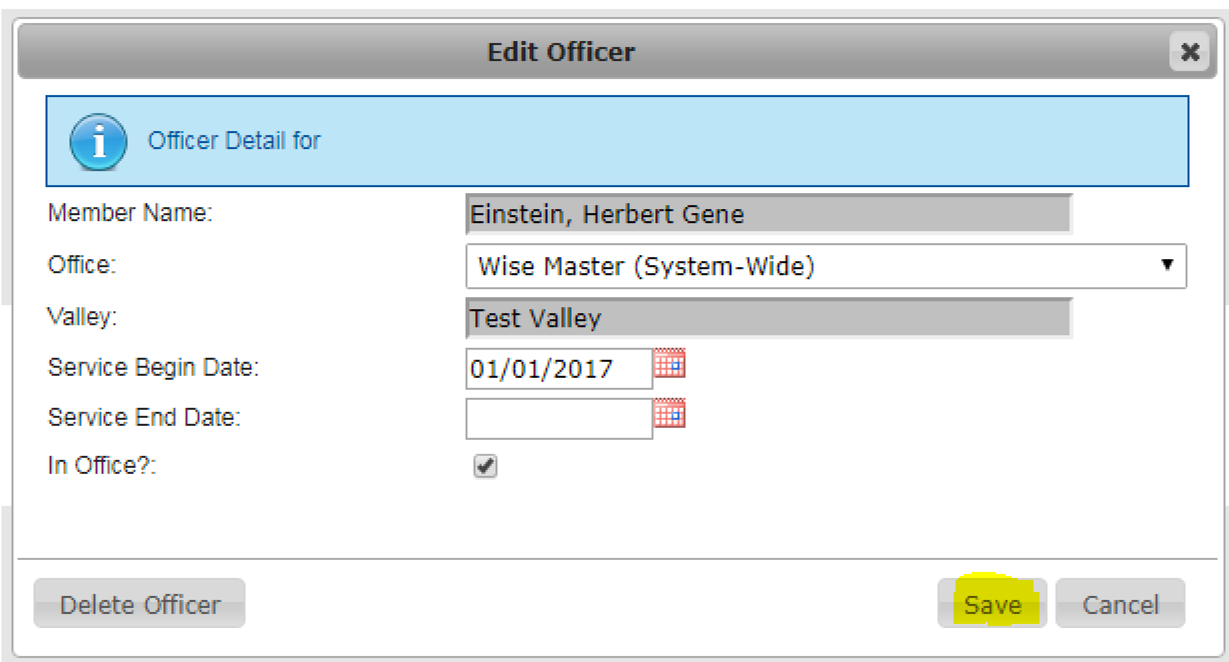
7. The **Edit Office** window opens.



8. To change his office to Wise Master, click the dropdown arrow on the **Office** line to open the selection menu. Click Wise Master to select it. Notice again that all of the options in this menu are labeled "System Wide." This means that these options are available to all Sentinel users in all Valleys. Al Valley can create its own offices that are not seen by all Valleys. We will explain this feature later in this Chapter.



9. Click the **Save** button to finish.



9.3 DELETING AN OFFICER

The only time that you will want to delete an officer is if that person was entered by mistake or has duplicate entries in the same office; otherwise, you will want to retain his record so that your Valley will have a history of his officer activity.

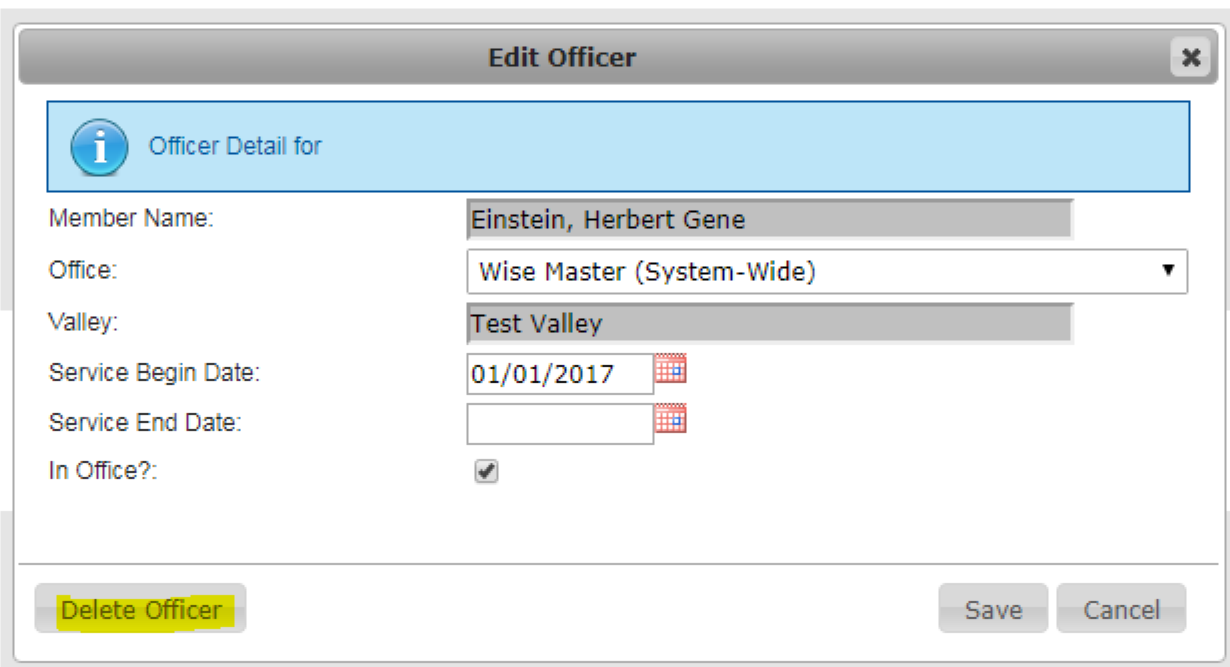
There are two methods for deleting an officer. It can be done on the **Edit Officer** screen and also on the Brother's Profile screen.

9.3A DELETING AN OFFICER USING THE EDIT OFFICER EDIT SCREEN

Follow these steps to delete an officer using **Edit Officer**.

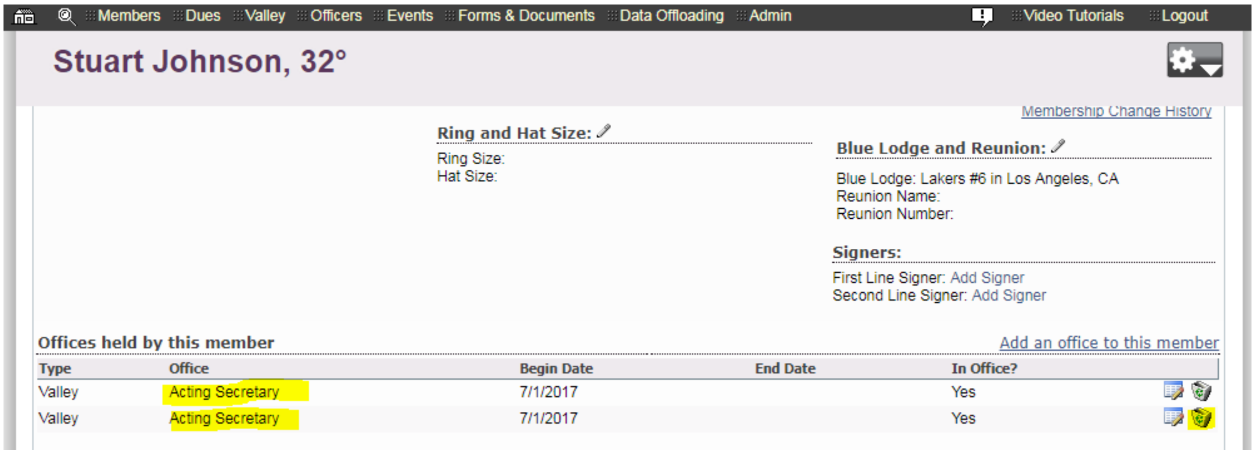
1. Earlier in this Chapter you learned how to edit an officer record using one of two methods: accessing the **Edit Officer** screen from the member's Profile or accessing the **Edit Officer** screen by performing an Office search. We won't go through these steps again, but if you need a refresher, see the two preceding sections and choose which method you prefer.

   Once you have the **Edit Officer** screen displayed for the officer that you want to delete, simply click the **Delete Officer** button.

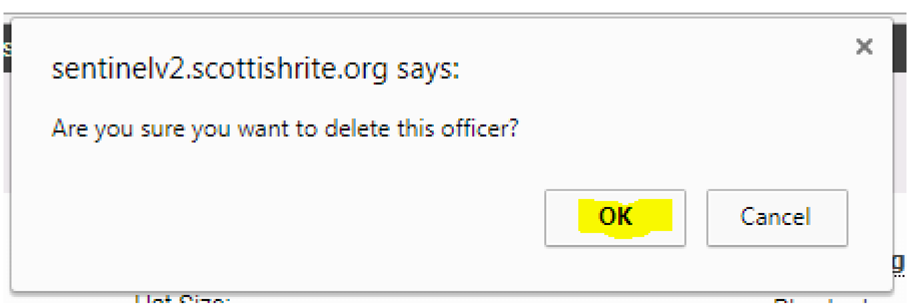


Search and display the Profile screen (his main membership page) and scroll down the page until you see **Offices held by this member**. For this example we are using the Profile screen for Stu Johnson that displays two entries for Acting Secretary. To delete one of the duplicate entries, click the **Trash Can** icon.

Deleting an Officer Using His Profile Screen



2. Sentinel will ask if you are sure you want to delete this entry. Click **OK** to delete the duplicate record.

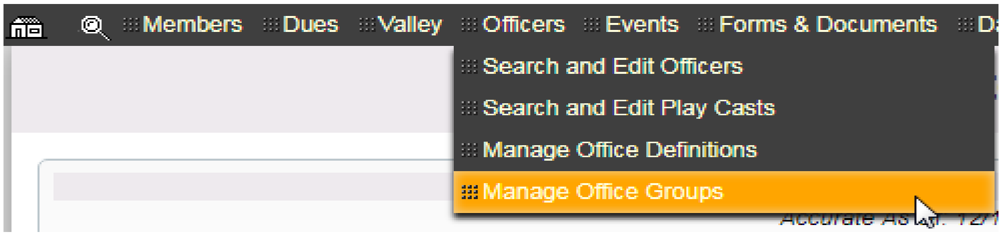


9.4 OFFICER GROUPS: CREATING NEW GROUPS AND NEW OFFICER DEFINITIONS

In the previous sections of Chapter 7, we showed you how to add and edit offices that were already assigned to the pre-defined **Group** called **System Wide**. However, each Valley may create its own Groups and officer types. An example of a Valley Group might be a Degree committee or an event committee. Within these committees, the Valley may assign offices such as chairman, president, vice president, or member.

Follow these instructions to create a new **Officer Group**.

1. For this example, we will add a new **Officer Group** called "Membership Committee." Hover your mouse pointer over **Officers** on Sentinel's black menu bar and click **on Manage Office Groups**.



2. The Add page will open. Your page may look very different depending on how many Groups your Valley has already created. To add a new Group, it may be necessary to scroll to the bottom of the list to find the blank **Group** field with the **Add** button.

Office Groups

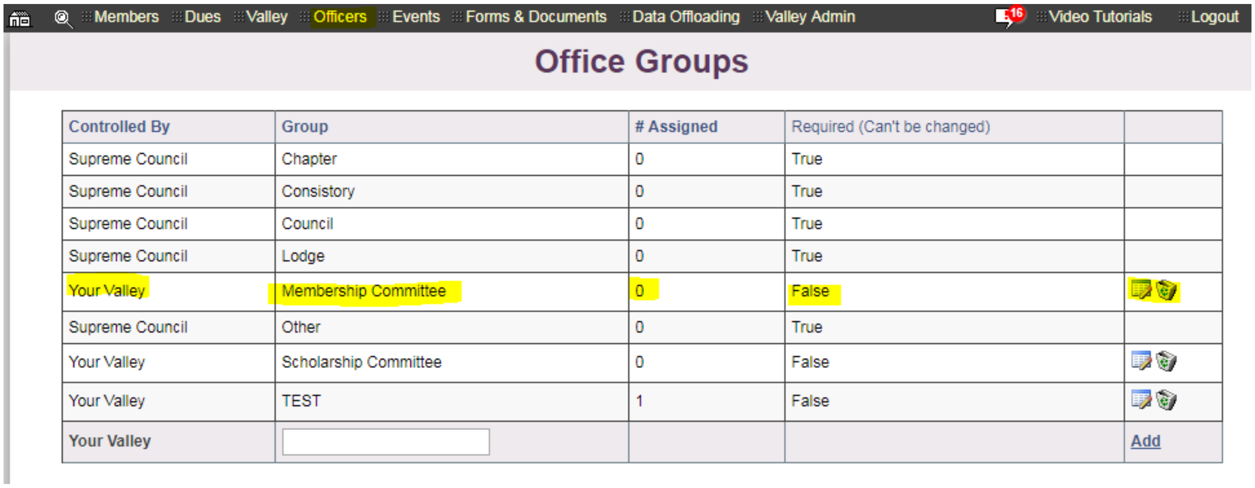
Controlled By	Group	# Assigned	Required (Can't be changed)	
Supreme Council	Chapter	0	True	
Supreme Council	Consistory	0	True	
Supreme Council	Council	0	True	
Supreme Council	Lodge	0	True	
Supreme Council	Other	0	True	
Your Valley	Scholarship Committee	0	False	
Your Valley	TEST	1	False	
Your Valley				Add

3. Click in the empty box and type the name for your new Group. We are using "Membership Committee" for this example.

Your Valley	Membership Committee			Add

4. Click the **Add** button to save your new Group. Now, when you go back and click on **Officers** on the menu and choose **Manage Office Groups**, you will see your new Group displayed in the list.

However, an Office Group serves no purpose without an Officer assigned to it, so we will cover this in the following section.



Controlled By	Group	# Assigned	Required (Can't be changed)	
Supreme Council	Chapter	0	True	
Supreme Council	Consistory	0	True	
Supreme Council	Council	0	True	
Supreme Council	Lodge	0	True	
Your Valley	Membership Committee	0	False	
Supreme Council	Other	0	True	
Your Valley	Scholarship Committee	0	False	
Your Valley	TEST	1	False	
Your Valley				Add

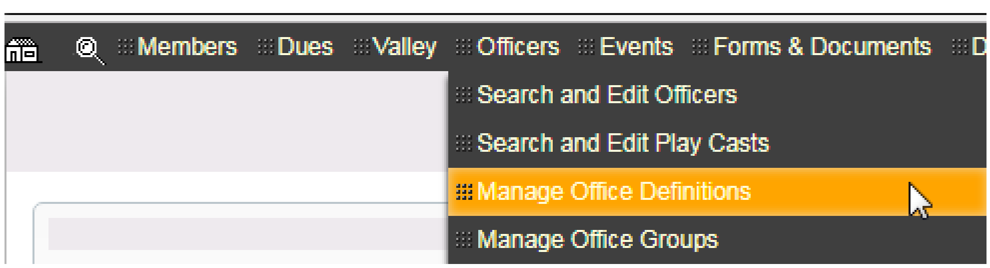
OFFICER DEFINITIONS: CREATING OFFICER POSITIONS FOR OFFICE GROUPS

In Section 9.4 we created a new **Officer Group** called Membership Committee. Now, we will assign **Officer Definitions** to the Group. Think of an Officer Definition as the President, Vice President, Chairman, or general member of a committee.

Follow these instructions to create new Officer Definitions.

1. For this example we two Office Definitions, President and Member, to the Membership Committee Group that we created in Section 9.4.

2. Hover your mouse pointer over **Officers** on Sentinel's black menu bar and click on **Manage Office Definitions.**



3. Your Office Definitions page may look much different than the following depending on how many officers are already defined in your Valley. If the list is very long, it may be necessary to scroll down the page until you come to the bottom line with the blank fields.

   We are going to add the **Office Definition** of “President” to the Membership Committee. Thus, click the downward arrow in the **Group** column to open the menu and choose Membership Committee from the list.

   Next, type “President” as the **Office Name**.

   Enter the **Office Rank** as the number 1. This ranks the President as the top-level member of the committee.

   Click the **Add** button to save your new Office Definition.

Office Definitions

Controlled By	Group	Office Name	Office Rank	# Assigned	
Supreme Council		Acting Personal Representative (Valley)	200	0	
Supreme Council		Acting Secretary	202	2	
Supreme Council		Club Personal Representative	225	0	
Supreme Council		Co-Personal Representative (Valley)	300	0	
Supreme Council		Commander	80	2	
Supreme Council		Master Of Kadosh	90	0	
Supreme Council		Personal Representative	110	0	
Your Valley	TEST	Test Officer	201	0	
Supreme Council		Valley Secretary	100	3	
Supreme Council		Venerable Master	60	3	
Supreme Council		Wise Master	70	1	
Your Valley		President	1		Add

Chapter
Consistory
Council
Lodge
Membership Committee
Other
Scholarship Committee
TEST

4. Repeat above steps 1-3, but this time, create an **Office Definition** for “Member.” Now, you will have a new committee that has a President assigned to it and an **Office Definition** to assign people as “Members.” You do not need to create multiple “Member” definitions. For example, if the committee has five members, you would assign all of them to the “Member” category that you created.

   For instructions on how to assign members to groups, see Sections 9.1A and 9.1B.

CHAPTER 10: PLAY CASTS (SEARCH AND EDIT)

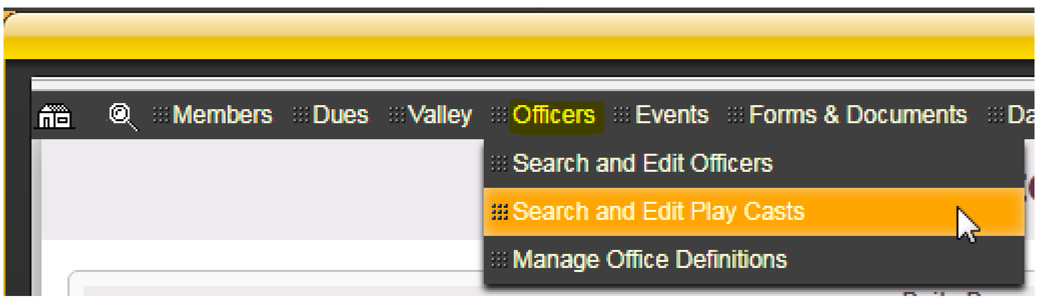
Sentinel allows the Valley to assign Brothers to play cast roles for the 4° through the 32°. The play cast roles were introduced in Sentinel, version 1. The roles initially available in Sentinel were in accordance with the modern roles. However, because Valleys often use variations of plays and play roles, the Grand Executive Director allowed for flexibility in the roles that may be maintained in Sentinel. Thus, if the roles for the Degrees for which your Valley performs are not displayed in Sentinel, please contact the Supreme Council Computer Services to request that the roles be customized for your Valley.

The following sections will explain how to search, add and edit play role assignments.

10.1 DISPLAYING PLAY CAST ROLES

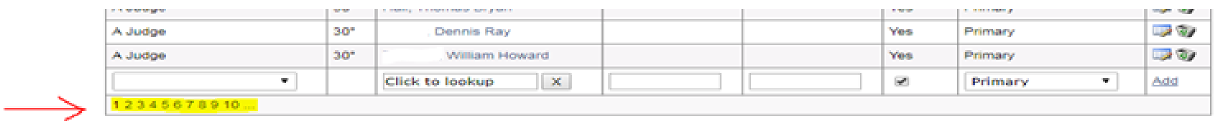
Search and Edit Play Casts is located on the Officers dropdown menu. To display a list of Brothers assigned to all or certain play casts, follow these steps.

1. Hover your mouse pointer over the Officers tab and click on **Search and Edit Play Casts.**



2. The **Search and Edit Play Casts** page opens and displays the names of Brothers already assigned to a role. Ten names display on each page. The user can sort the list by clicking the column heading: **Role, Play, Name, First Acted, Last Acted, Active?, or Status?**

Ten names are displayed on each page. The pages are numbered in the lower left corner of the page. If your Valley has more than ten officers, click on “2” to display the next set of ten names, and so forth.

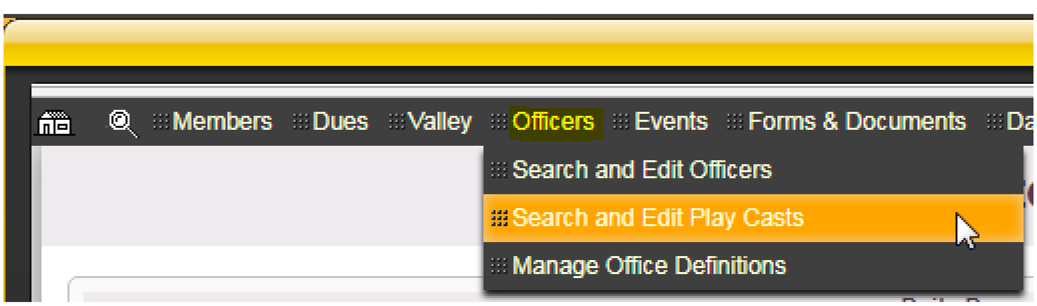


Please note that names have been purposefully altered for these displays for privacy purposes.

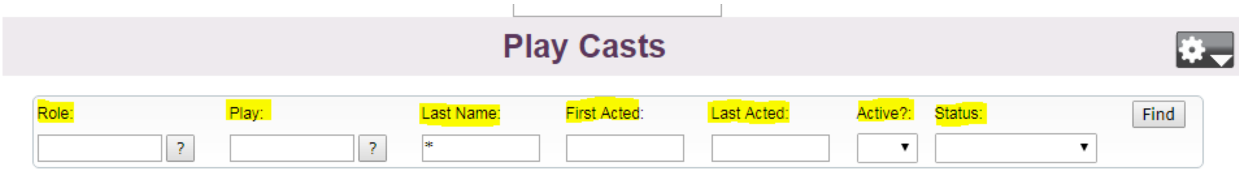
10.2 SEARCHING PLAY CAST ROLES

Sentinel allows the user to search by **Role, Play, Last Name, First Acted** (date**), Last Acted** (date), **Active** (yes, no), and **Status** (Primary, Alternate, etc.)

1. Hover your mouse pointer over the Officers tab and click on **Search and Edit Play Casts.**



2. The search boxes display. The search is performed by adding search criteria to the boxes and clicking the **Find** button. The user can search on a single box on a combination of boxes.



To search on a **Role** and/or **Play**, click the question mark to display a list of options. To search for a name, type the name in the **Last Name** text box and click the **Find** button.

First Acted and **Last Acted** are date boxes that can be combined with any other criteria. For example, select a **Role**, and **Play** and enter the date of the play to search for the Brother who performed the role on the date selected and the Role and Play selected.

Active is a Yes/No box. If this box is set to **Yes**, this indicates that the Brother is currently assigned to the role. If the box is set to **No**, this indicates that he is no longer assigned to the role.

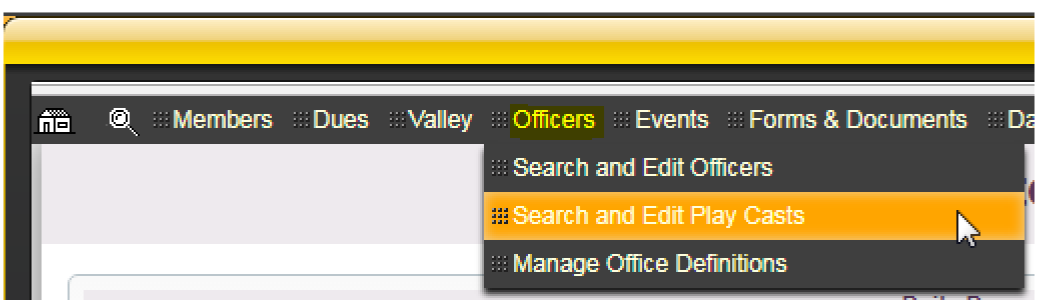
Status describes the Reunion to which the Brother is assigned to a role. The options are **Primary, Spring Primary, Fall Primary, Alternate, Spring Alternate, and Fall Alternate**. These Status descriptions were entered by Valley request and may be used as needed by each Valley.

10.3 ADDING A MEMBER TO A PLAY ROLE

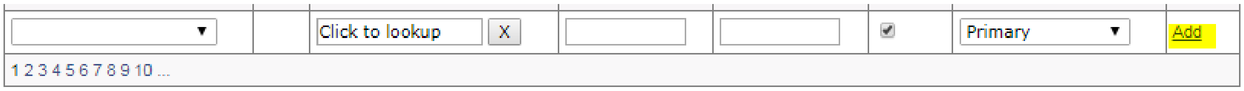
Sentinel allows a user to assign a Brother to a **Play Role** by first choosing the play (4° - 32°) and then choosing the role for that play (Orator, Master of Ceremonies, Captain of the Guard, and so forth).

Follow these instructions to assign a Brother to a play role.

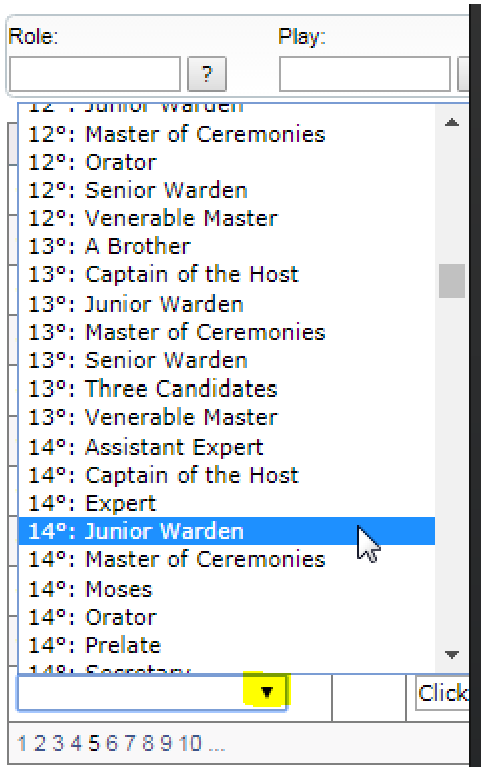
1. Hover your mouse pointer over the Officers tab and click on **Search and Edit Play Casts.**



2. The **Play Cast** page displays with a list of members assigned to roles. If your Valley displays a long list of names, scroll to the end of the list of names to find the "Add" boxes.

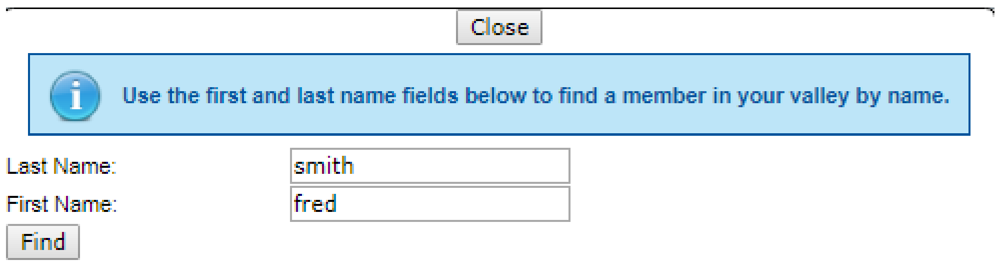


3. To choose the role that is being assigned, click the downward arrow to open the Role menu. Select the Role by clicking on its name. The Role should now be highlighted in blue. We are using 14° Junior Warden for this example.



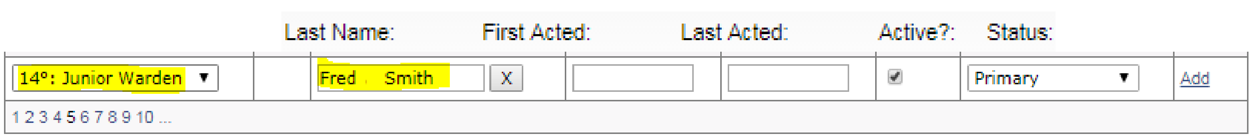
4. Choose the member whom you are assigning to the role of Junior Warden by clicking directly in the **Click to Lookup** box.

5. The lookup box opens. Type the **Last Name** and **First Name** in the appropriate boxes. For this example, we are assigning Fred Smith to the role of Junior Warden. Click the **Find** button to search for Fred Smith among your membership.

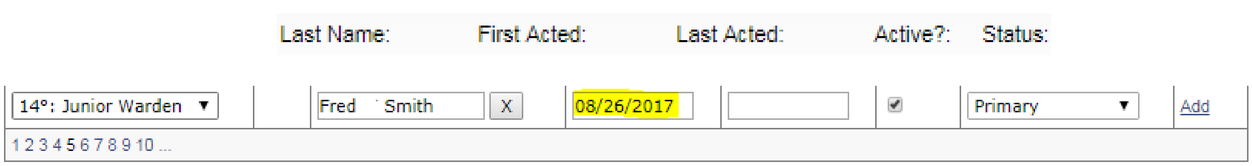


6. The search returned two members with the name, "Fred Smith." *Please note that the ID names and addresses have been intentionally blocked out. You will be able to view this information for your members.*

Select the correct Fred Smith by clicking on his name. Your Add page should now look like the following:

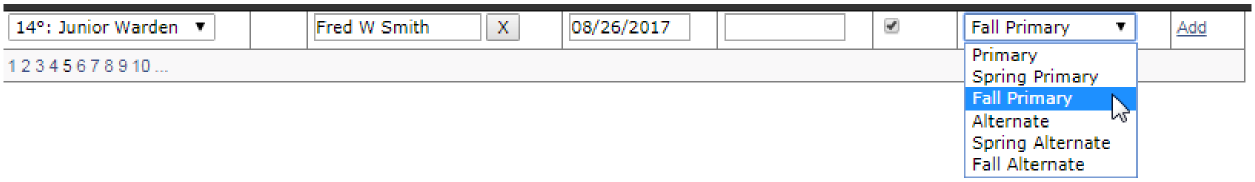


7. Enter the **First Acted** and **Last Acted** dates (is applicable). For this example, we will leave the **Last Acted** date empty because we do not know how long the member will be assigned to this role. Next, if the Brother is currently assigned to the role, click the **Active** check box.

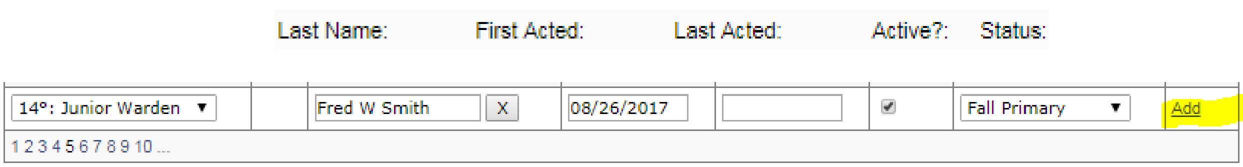


8. The final step is to choose a **Status**. The status indicates which Class (Spring or Fall) and whether the Brother is assigned as the **Primary** or **Alternate** player. Use these descriptions as you see fit.

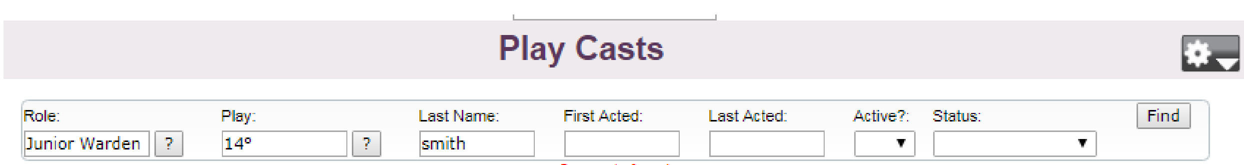
   Click the downward arrow to open the dropdown menu. Select the **Status** by clicking on its name to highlight the name in blue. We are choosing Fall Primary.



9. Your Add page should look like the following. Click the **Add** button to save your role addition.



10. To ensure that Fred Smith was added as the 14° Junior Warden, perform the following search.



Sentinel returns the following information.

CHAPTER 11: EVENTS

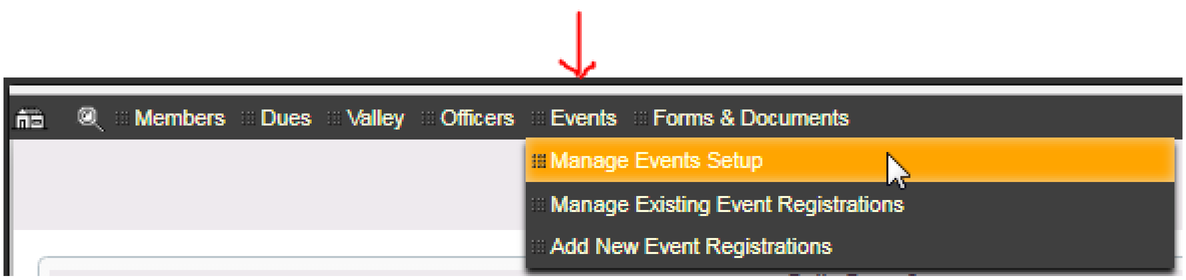
The Events feature in Sentinel is a tool for creating events specific to a Valley. Whether it is a Reunion, stated meeting, or a social gathering such as a potluck dinner, Sentinel provides the management tools to create your event and register guests with up to five different package costs.

The **Events** section is also linked to the Online Member Portal at My.ScottishRite.org. By clicking a checkbox in Sentinel, your Valley can advertise its events to your members who access the Member Portal. This will be explained further in the following sections.

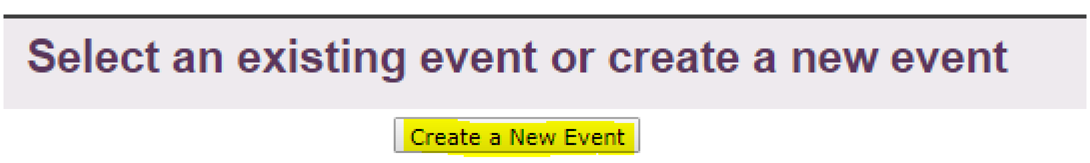
11.1 CREATE A NEW EVENT

Following these instructions to create a new Valley event.

1. The **Events** tab is located on Sentinel's black menu bar. To view the Events menu, hover your mouse pointer over **Events**.



2. Click on **Manage Events Setup**. When the Events page opens, click on **Create a New Event**.



3. The **Event Setup and Definition** page opens. This is where you will create your event and define the event's package costs if needed.

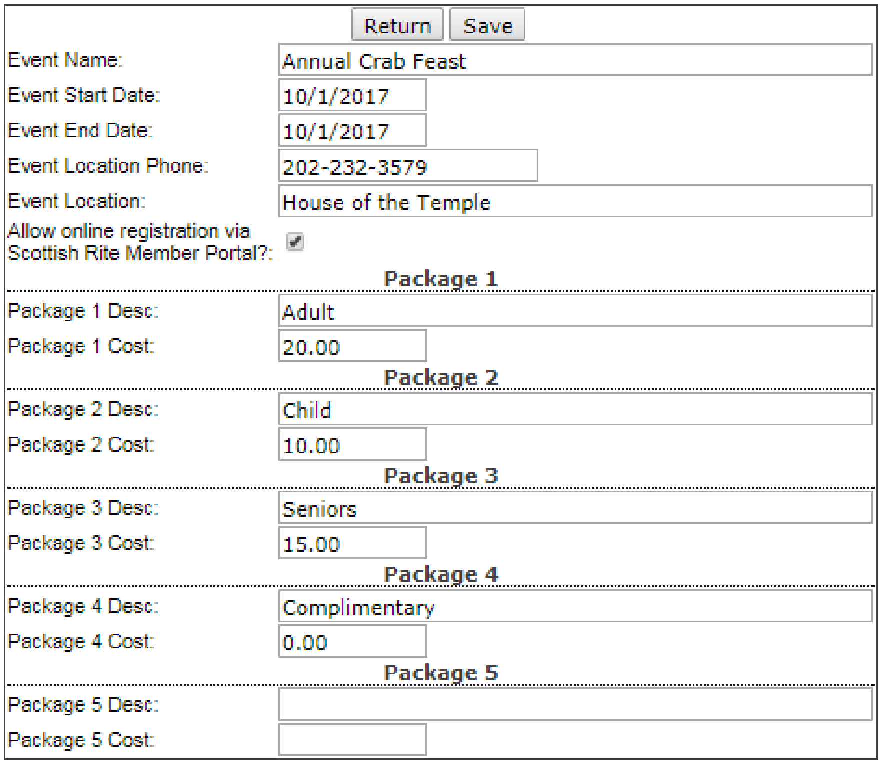
The following is a completed event form for the Annual Crab feast. It has four package costs entered. Depending on the event, it may have no package costs or up two five package costs. Also, the option to **Allow online registration via Scottish Rite Member Portal?** is checked. This is a yes/no checkbox. Checking the box indicates that you want this event to be displayed to your members when they access the Online Member Portal at my.scottishrite.org. *Please note that the wording is misleading and will be changed. Members can only view your event listing, they cannot actually register online.*

Event Setup and Definition - Adding New Event Setup Record

	Return Save
Event Name:	Annual Crab Feast
Event Start Date:	10/1/2017
Event End Date:	10/1/2017
Event Location Phone:	202-232-3579
Event Location:	House of the Temple
Allow online registration via Scottish Rite Member Portal?:	☑
	Package 1
Package 1 Desc:	Adult
Package 1 Cost:	20.00
	Package 2
Package 2 Desc:	Child
Package 2 Cost:	10.00
	Package 3
Package 3 Desc:	Seniors
Package 3 Cost:	15.00
	Package 4
Package 4 Desc:	Complimentary
Package 4 Cost:	0.00
	Package 5
Package 5 Desc:	
Package 5 Cost:	

4. Once the form is completed, click the **Save** button at the top of the form. The event has been saved, and you are now ready to add registrants.

Event Setup and Definition - Adding New Event Setup Record

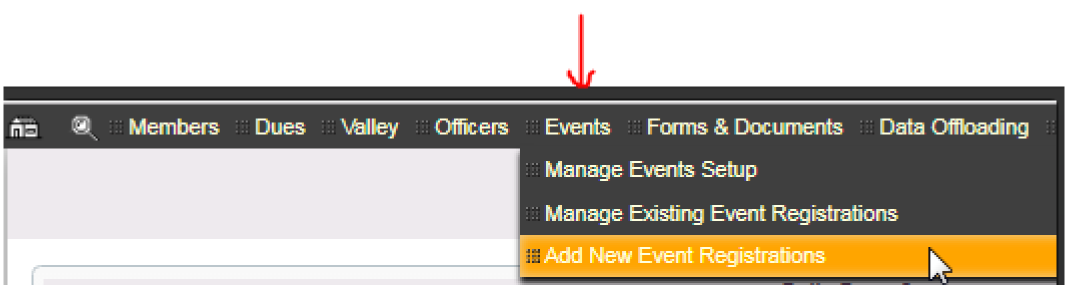

Return Save

Event Name:	Annual Crab Feast
Event Start Date:	10/1/2017
Event End Date:	10/1/2017
Event Location Phone:	202-232-3579
Event Location:	House of the Temple
Allow online registration via Scottish Rite Member Portal?:	☑
Package 1	
Package 1 Desc:	Adult
Package 1 Cost:	20.00
Package 2	
Package 2 Desc:	Child
Package 2 Cost:	10.00
Package 3	
Package 3 Desc:	Seniors
Package 3 Cost:	15.00
Package 4	
Package 4 Desc:	Complimentary
Package 4 Cost:	0.00
Package 5	
Package 5 Desc:	
Package 5 Cost:	

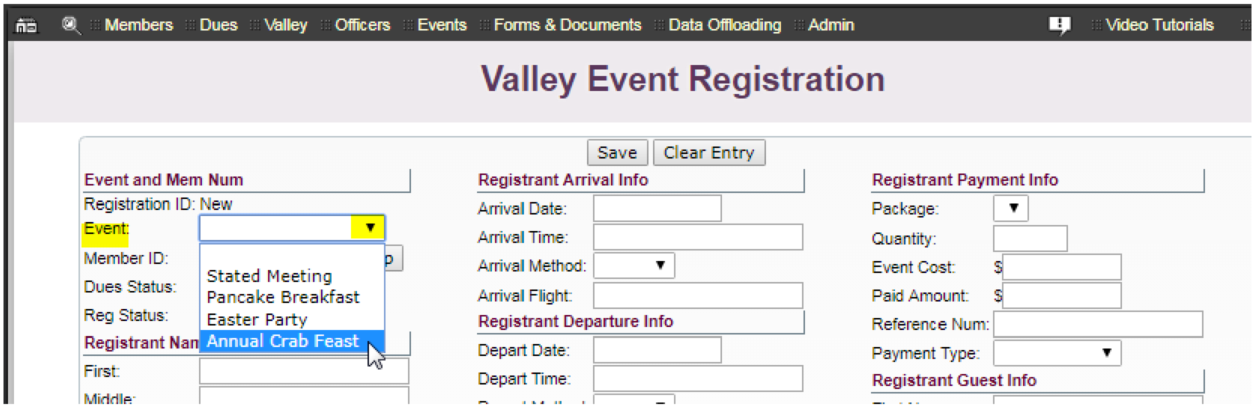
11.2 ADD REGISTRANTS TO AN EVENT

This section will instruct you on how to add registrants to an event that has already been created in Sentinel Events.

1. Hover your mouse pointer over **Events** on Sentinel's black menu bar. Click on **Add New Event Registrations**.



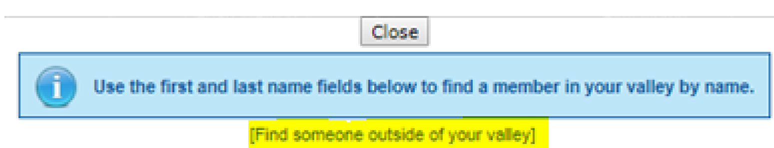
2. To add a registrant to an event, first select the event by clicking the downward arrow next to **Event**. Highlight the event in blue by clicking on the name of the event. We are selecting the **Annual Crab Feast** for this example.



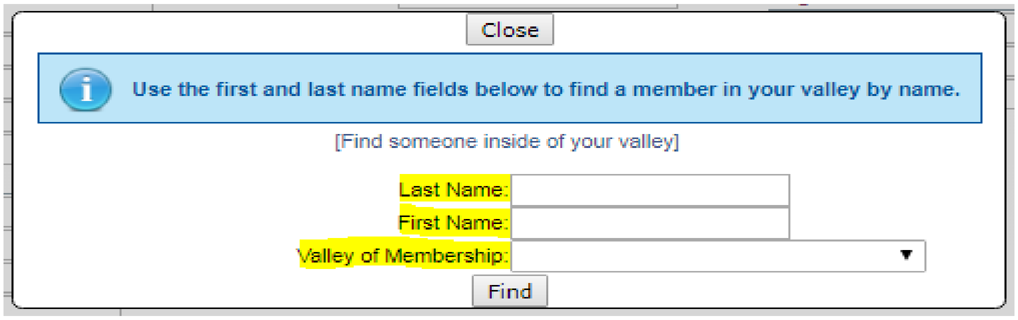
3. If the registrant is a member in your Valley, Sentinel will auto-populate his name and contact information in the form. If the registrant is not a member in your Valley, skip this step and manually enter all of his or her information starting with **Registrant's Name**. However, for this example, we will assume that the member is affiliated with your Valley.

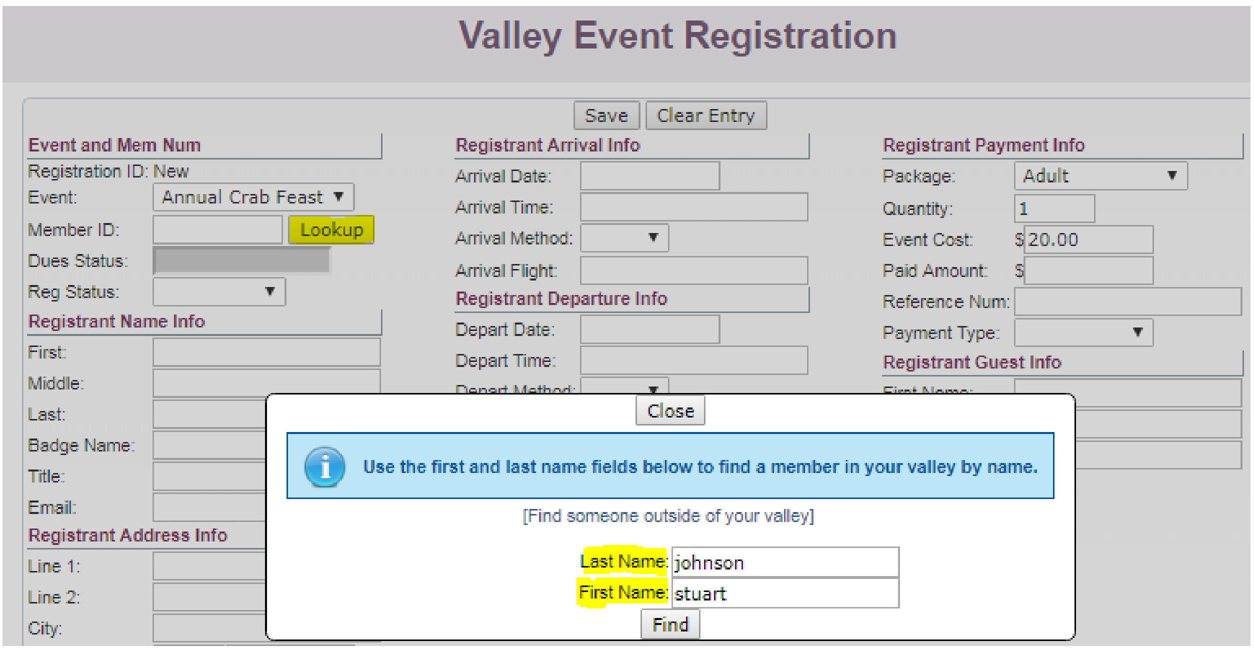
   First, if you have the Brother's Member ID, type it into the **Member ID** box, and then click the **Tab** key on your keyboard. This action will write his information to the registration page. If you do not have the Brother's Member ID, click the **Lookup** button and type in his **Last Name** and **First Name**. Click the **Find** button.

   PLEASE NOTE: You may also register Brothers who are not a member in your Valley by clicking on **Find Someone outside of your Valley.**

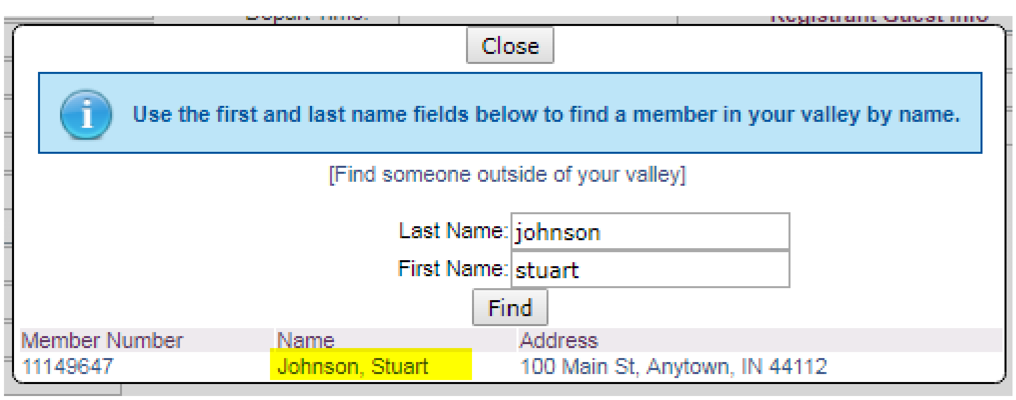


   You will need to know his Last Name, First Name, and Valley to use this feature.

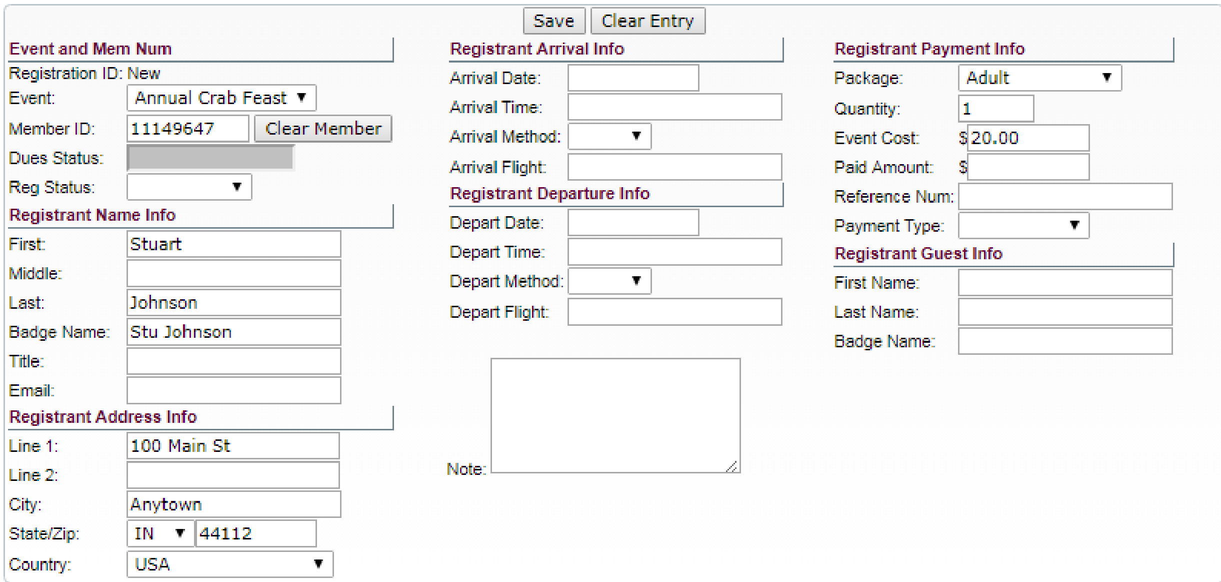




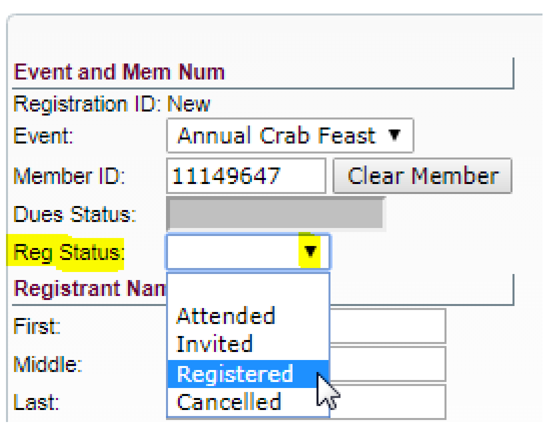
4. The **Lookup** box will display any Brother in your Valley with the name that you entered. Click the Brother's name to select him.



5. When you click the Brother's name, Sentinel will automatically display the Brother's contact information in the registration form as in the following. Next, choose his **Reg Status** (Registration Status).



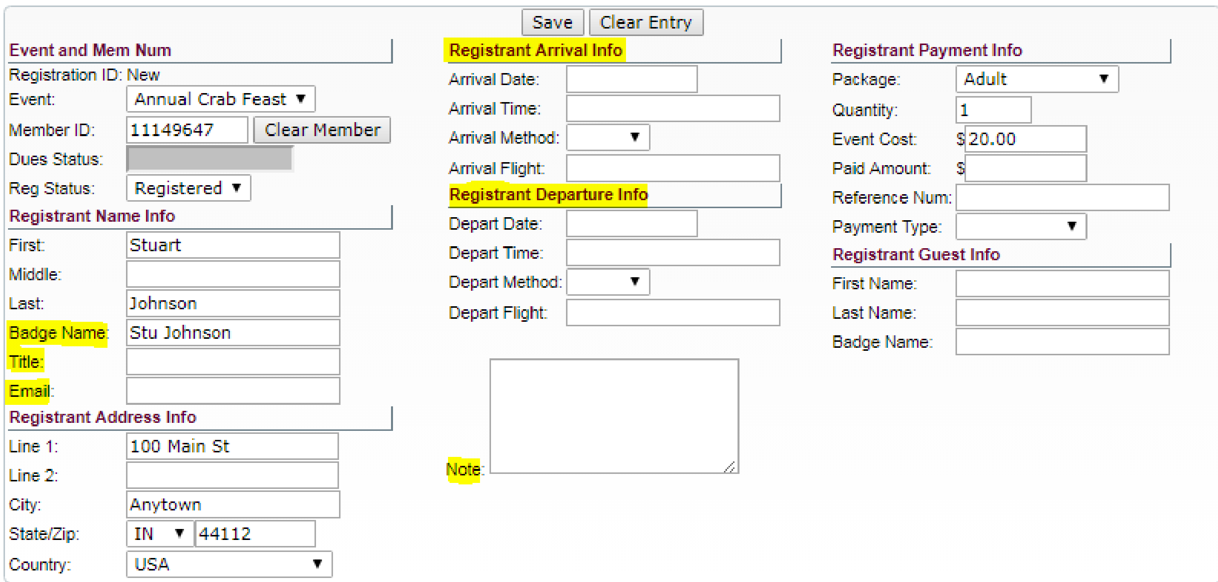
6. All registrants must have a **Registration Status**. Choose a registration status by clicking the downward arrow next to **Reg Status**. The options are **Attended, Invited, Registered, and Canceled**. Select a status by clicking on it to highlight it in blue. For this example we are using **Registered**.



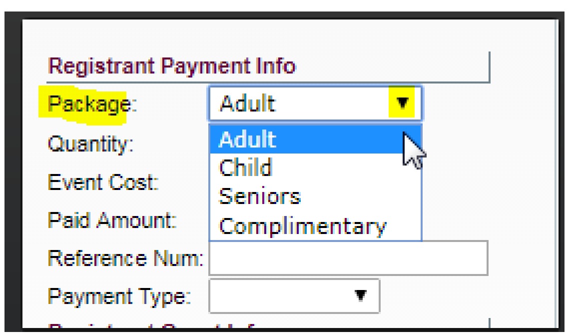
7. Complete the form by entering the remaining information. The **Badge Name** is optional. If your attendees will be given a name badge, enter the name in this box as you want it to appear on the badge such as Stu Johnson or Bro. Stuart Johnson, 32°.

   The attendees **Title** is optional as is the **Registrant Arrival** Info and **Registrant Departure Info**. If there is no email address shown and one is available, enter it in the Email box.

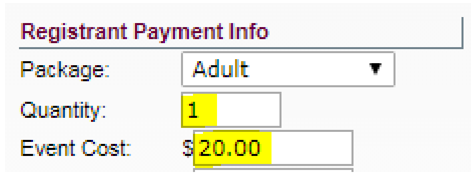
   Next, enter the **Registrant Payment Info**.



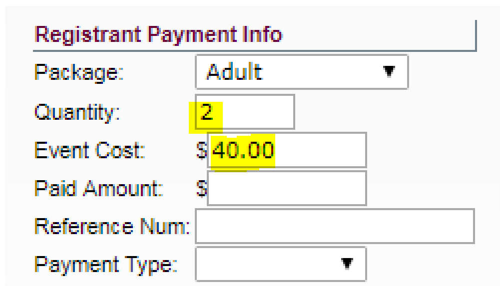
8. All registrants must have **Registrant Payment Info** entered even if the event has no fee assessed. First, choose the **Package** by clicking the downward arrow to open the package menu. For this example, we are choosing **Adult**.



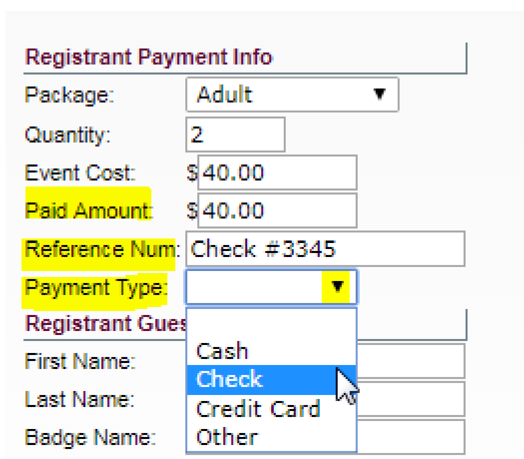
After choosing "Adult," the page will refresh to show the package cost as in the following:



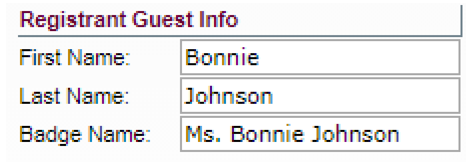
If your change the quantity number, the page will calculate the cost based on the quantity entered. For example, if you enter a quantity of two, the Event Cost will calculate to $40.00 as in the following:



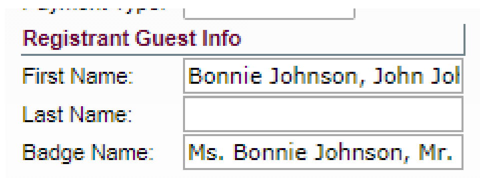
9. Next, if the attendee has paid, enter the **Paid Amount**; else leave it blank until the member pays. The **Reference Num** can be used as you see fit. For this example we will enter a check number. Choose a **Payment Type** by clicking the downward arrow to open the menu.



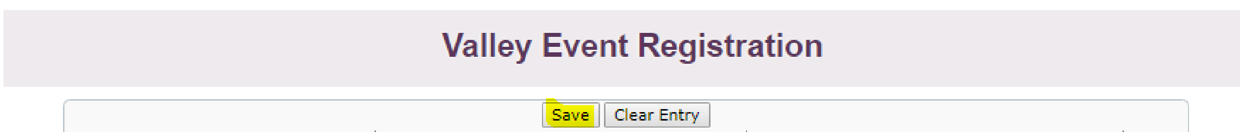
10. Finally, enter **Registrant Guest Info**.



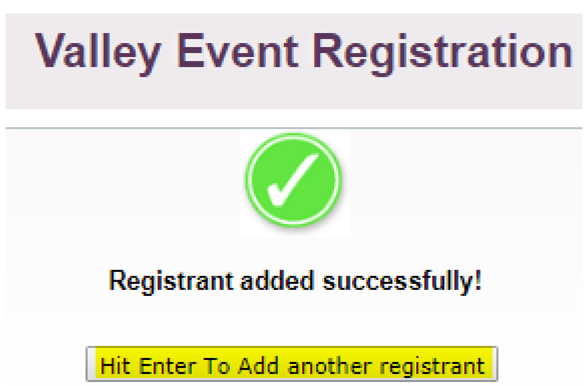
If the attendee has more than one guest, you can enter a string of names separated by a comma.



11. To finish, click the **Save** button at the top of the screen. If for some reason you do not want to save the entry, click the **Clear Entry** button.



Your registrant has been saved to the Annual Crab Feast event and the following message displays giving you the option to **Hit Enter to Add another registrant**.



11.3 MANAGE EXISTING EVENT REGISTRATIONS (SEARCH AND EDIT)

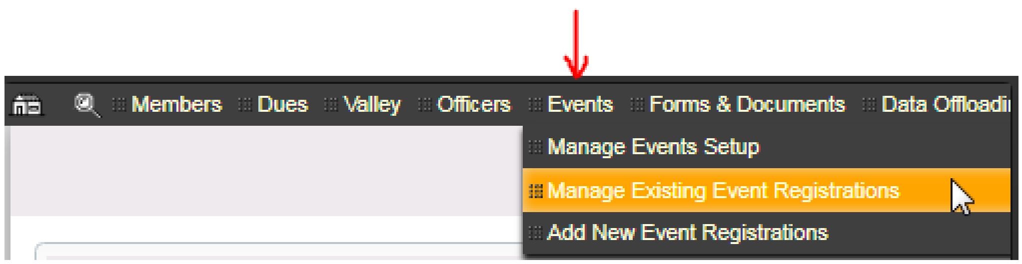
The **Manage Existing Event Registrations** feature allows the user to search for registration information, create attendee reports or edit information for attendees who are already registered for an event. For example, the user can update a registration to **Canceled**, enter a **Note**, enter or change guest information, delete the registration, and so forth.

In this section, we will focus on searching, editing and deleting registrants. We will cover reports in the next section.

11.3A SEARCH REGISTRATIONS

To search for events and information associated with those events, use **Manage Existing Event Registrations** located on Sentinel's black menu bar as shown below.

1. Hover your mouse pointer over **Events** and click on **Manage Existing Event Registrations**.



2. The search page opens. You can search on any blank box on the page and combine boxes to build searches.

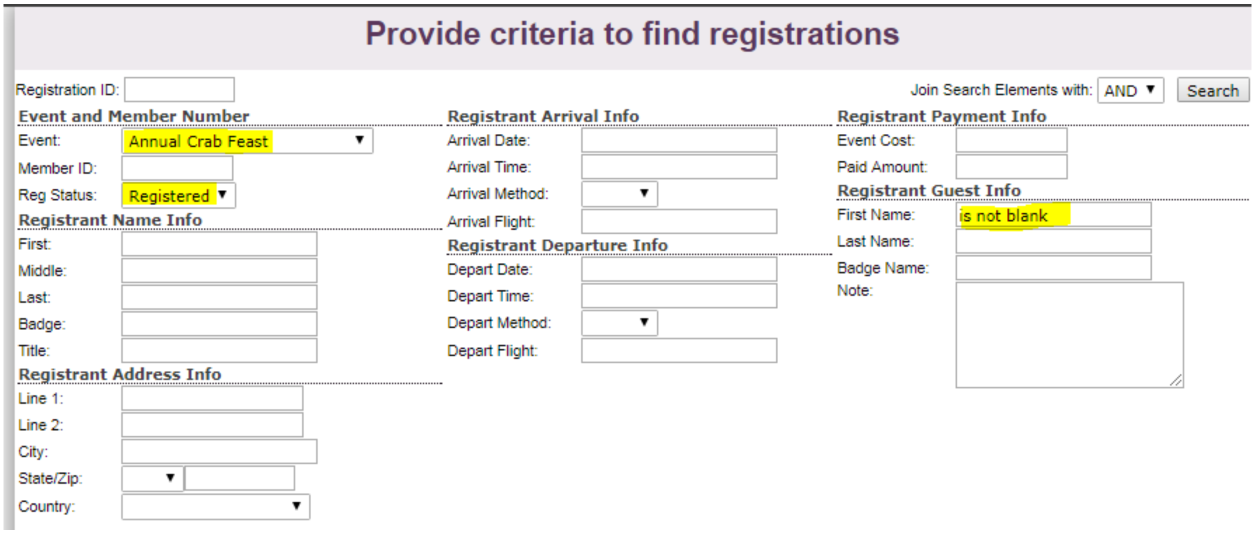
   To explain how this works, we will search for all of those registered for the Annual Crab Feast who are bringing a guest.

   3a. Choose the **Event** by clicking on the downward arrow and click on Annual Crab Feast.

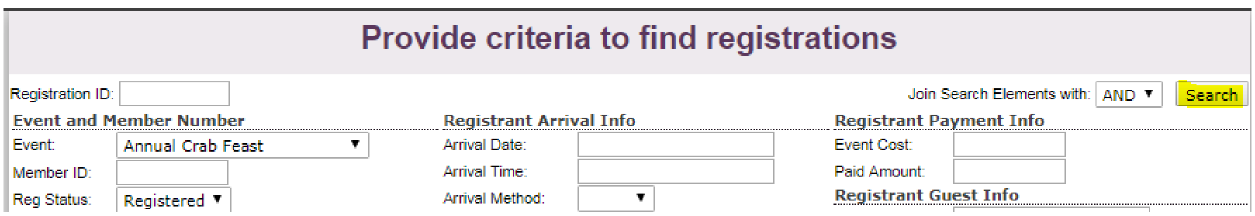
   3b. Choose a **Reg Status** of "Registered."

   3c. To include only the registrants who are bringing a guest, type **Is not blank** in **the First Name** box in the **Registrant Guest Info** section. This instructs Sentinel to look for all registrants of the Annual Crab Feast who have a value (name) in the **First Name** box.

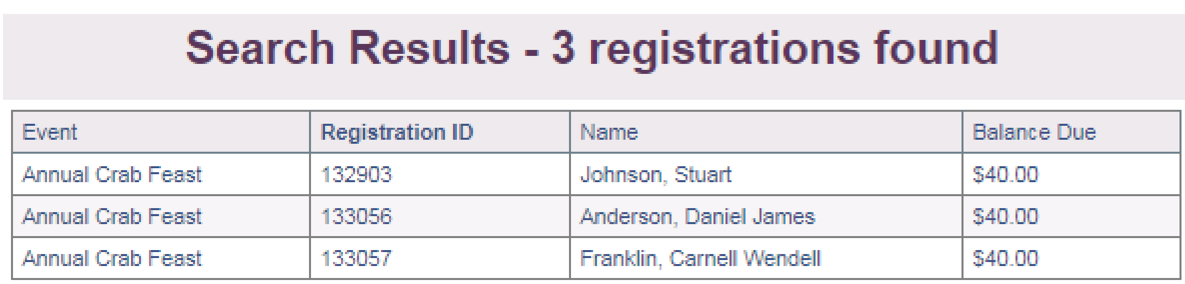
   You search should look like the following display:



3. To run the search, click the **Search** button in the upper right corner.



4. Sentinel displays the results of your search. From here you can click on a name to view the information or click the gear in the upper right corner to create a report.



Search Results - 3 registrations found

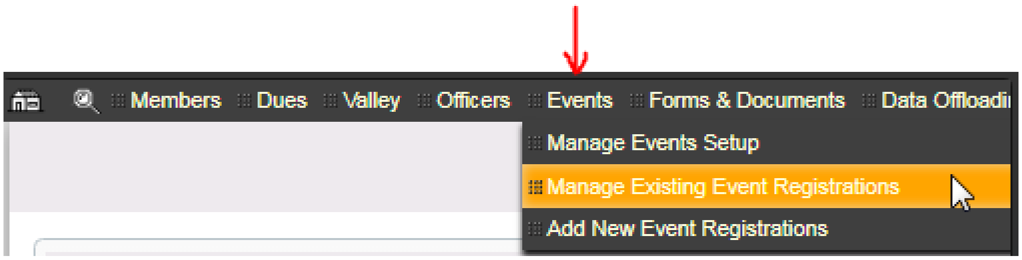
Event	Registration ID	Name	Balance Due
Annual Crab Feast	132903	Johnson, Stuart	$40.00
Annual Crab Feast	133056	Anderson, Daniel James	$40.00
Annual Crab Feast	133057	Franklin, Carnell Wendell	$40.00

All searches work the same, thus we will not describe the steps for all of them because they are too numerous. However, if you have issues with entering the criteria for a search, please contact Computer Services for instructions.

11.3B EDITING EVENT REGISTRANT INFORMATION

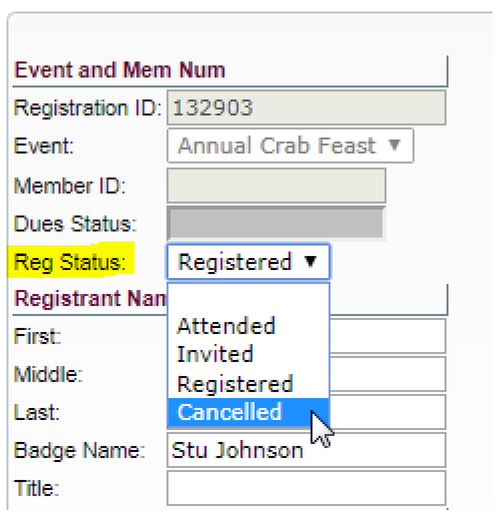
To edit registrant information, use **Manage Existing Event Registrations** located on Sentinel's black menu bar as shown below.

1. Hover your mouse pointer over **Events** and click on **Manage Existing Event Registrations**.

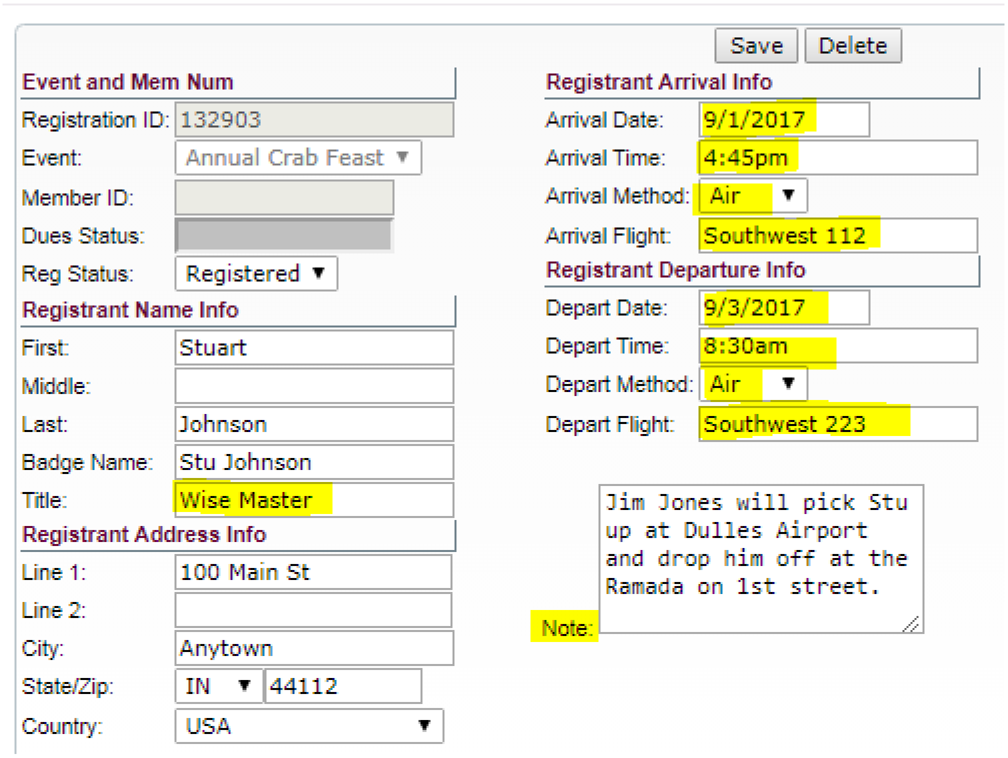


2. A typical registration screen is displayed below. You may edit any information on the screen.

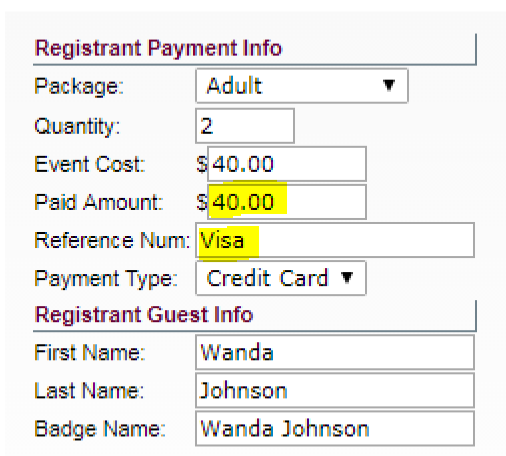
   2a. You may change the **Reg Status** (Registration Status) from **Registered** to **Canceled** by using the dropdown menu.



2b. You may enter a **Title** or set an **Arrival** and **Departure** date with travel information along with an instructional **Note**.



2c. You may record the registrant's payment of fees. **PLEASE NOTE! Never enter credit card numbers or social security numbers in Sentinel as the storage of this type of personal information is regulated by law.**



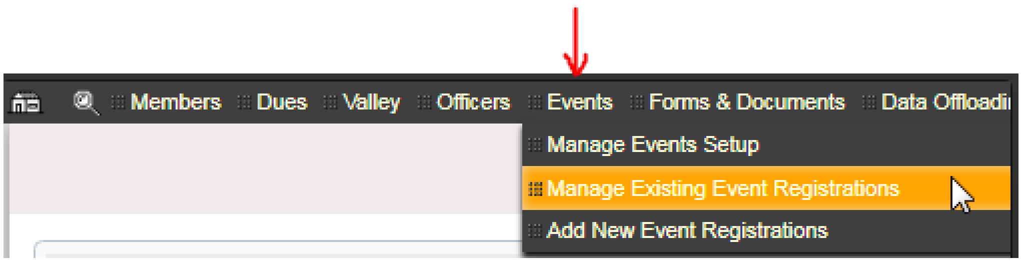
3. When updating registrant information, always be sure to click the **Save** button.

11.3C DELETING A REGISTRANT ENTRY

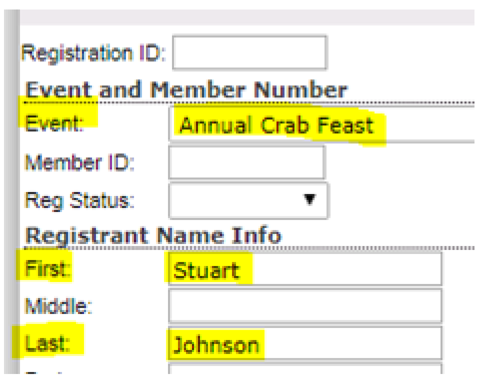
If for some reason you need to delete a registration rather than mark it as "Canceled," follow these instructions.

To delete registrant information, use **Manage Existing Event Registrations** located on Sentinel's black menu bar as shown below.

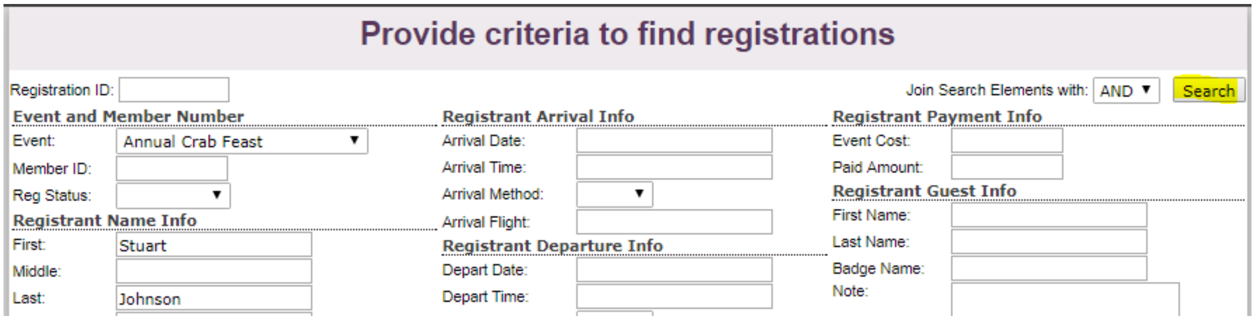
1. Hover your mouse pointer over **Events** and click on **Manage Existing Event Registrations**.



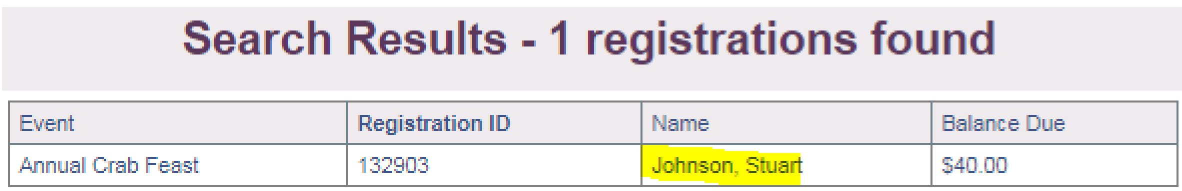
2. The search page opens. Choose the event for which the person is registered and type the name of the registrant that you want to delete in the name boxes.
3.



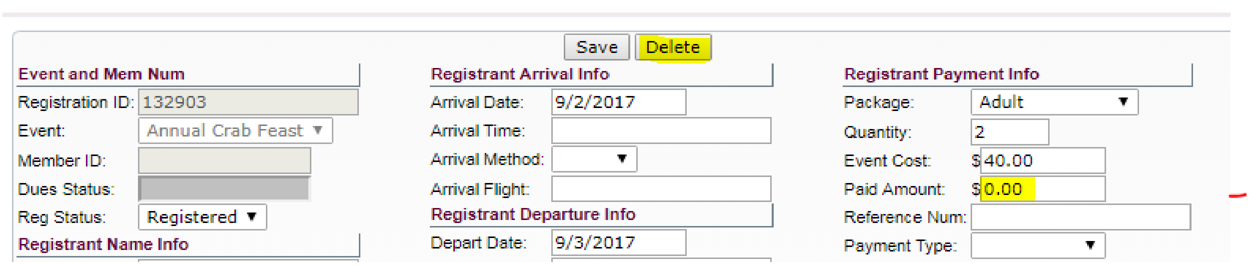
4. Click the **Search** button in the upper right corner.



5. The results page will display. Click on his name to display his registration page.



6. When his registration page displays, check to see if he has paid and is due a refund; otherwise, click the **Delete** button. Remember! Once a registrant is deleted, the registration cannot be restored by the system.

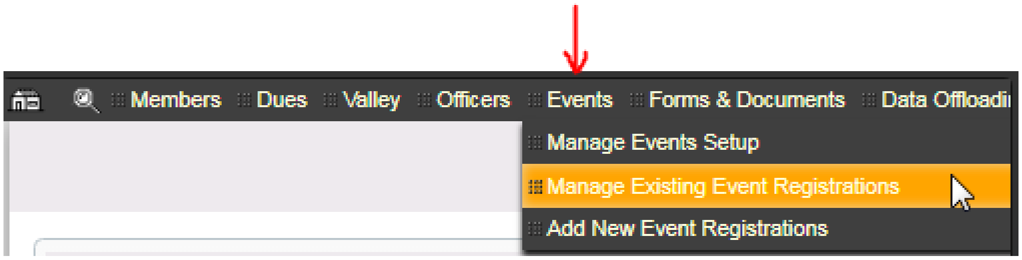


11.4 CREATING REGISTRATION REPORTS

Registration reports are created by performing a data extract. The user will first perform a search that will display the names of the registrants to be included in the report. Next, the user will build an extract that will display the specific information that will be included in the report. If you need instructions on how to perform a search see the section in this chapter entitled **Manage Existing Event Registrations (Search and Edit).**

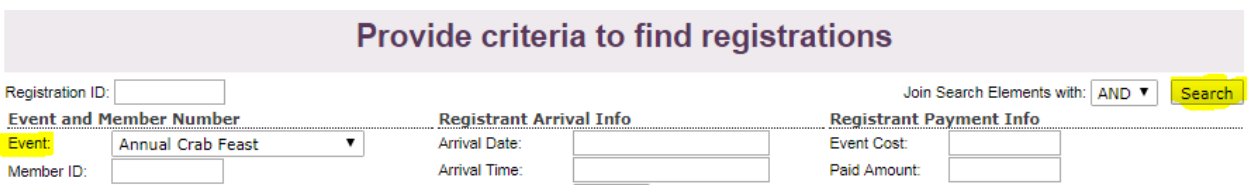
Follow these instructions to create registration reports.

1. Hover your mouse pointer over **Events** and click on **Manage Existing Event Registrations**.

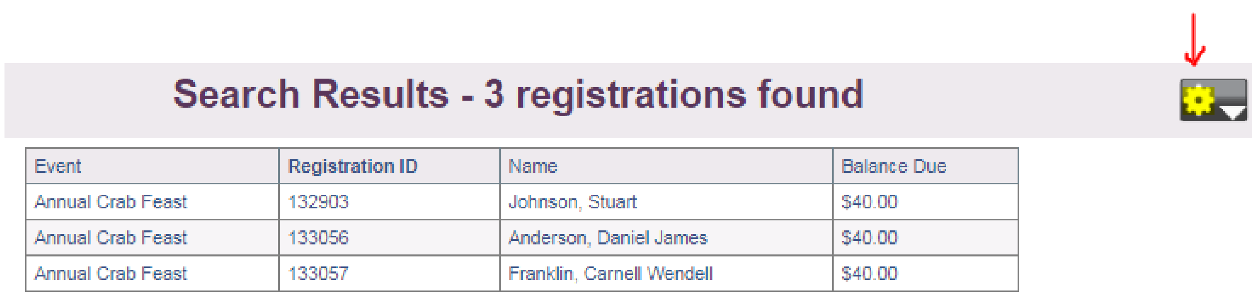


2. The search page opens. For this example, we will create a check-in roster for all persons registered for the Annual Crab Feast. The report will include the registration ID name, balance, due, paid amount, and the name of any guests.

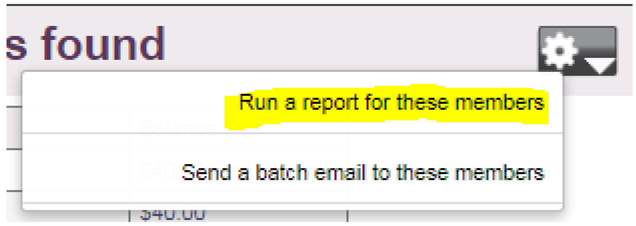
Create the search by choosing the event from the dropdown Event menu. We are selecting the Annual Crab Feast. Next, click the **Search** button.



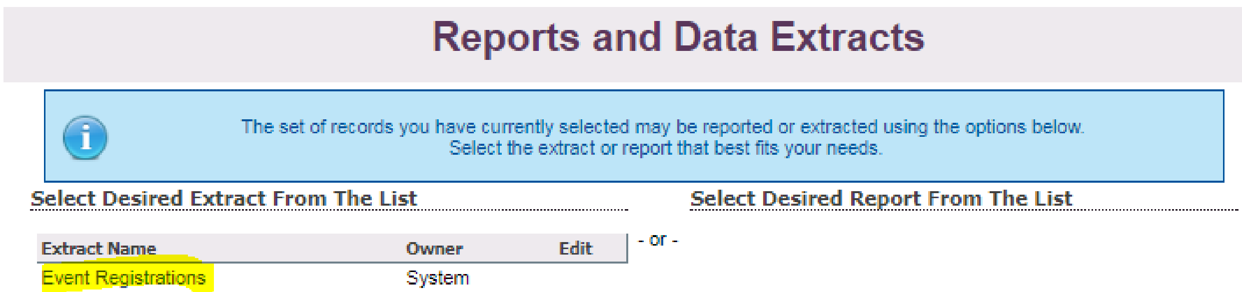
3. Sentinel displays the results of the search. Next, click the **Gear** in the upper right corner.



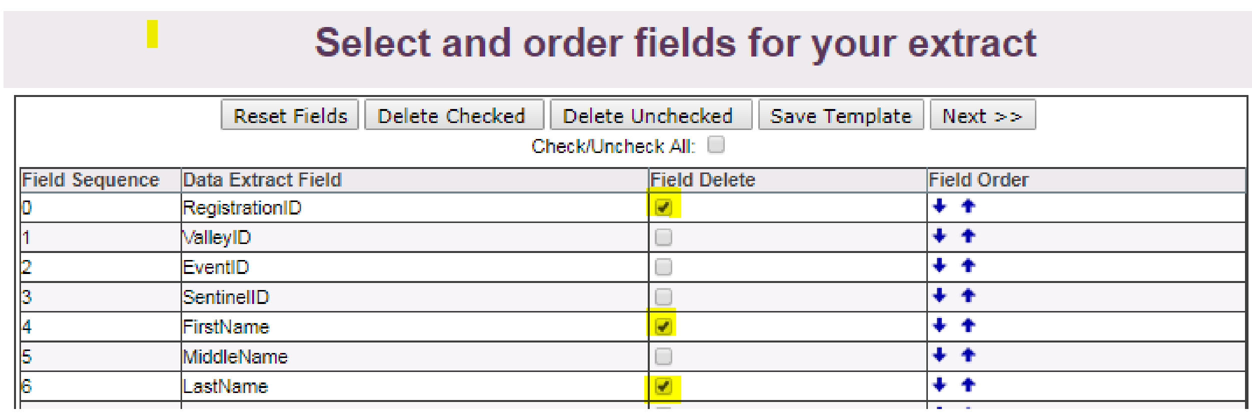
4. When the menu opens, click on **Run a report for these members**.



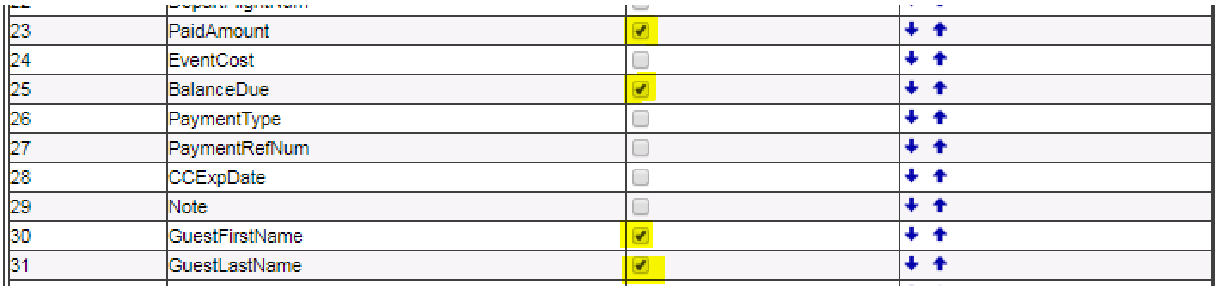
5. On the **Reports and Data Extracts** page, click on **Event Registrations**.



6. The extract page opens to display a list of **Data Extract Fields**. There are a total of 55 fields that the user may choose to build a report. To select a field to include in a report, check the box next to the name of the field. In the display below, the Registration Id, First Name, and Last Name are checked.

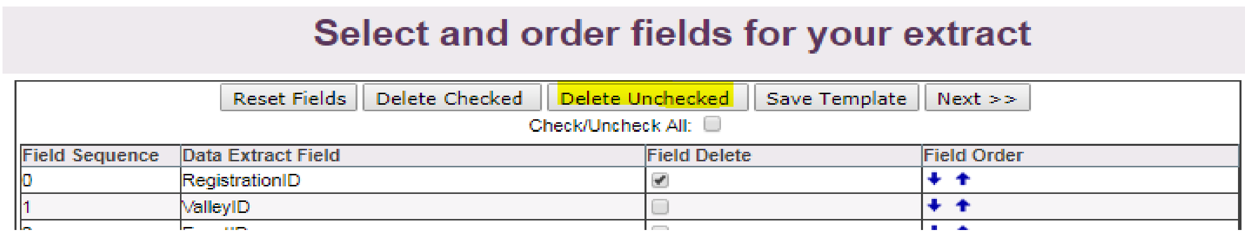


Because we are creating a check-in report we will also select the payment information and the guest information. You may, of course, include other fields as needed.



23	PaidAmount	✓	
24	EventCost		
25	BalanceDue	✓	
26	PaymentType		
27	PaymentRefNum		
28	CCExpDate		
29	Note		
30	GuestFirstName	✓	
31	GuestLastName	✓	

7. Once all fields are selected, you can save this extract for future use by clicking **Save Template;** otherwise, click the **Delete Unchecked** button at the top of the table to clear all of the unchecked fields.



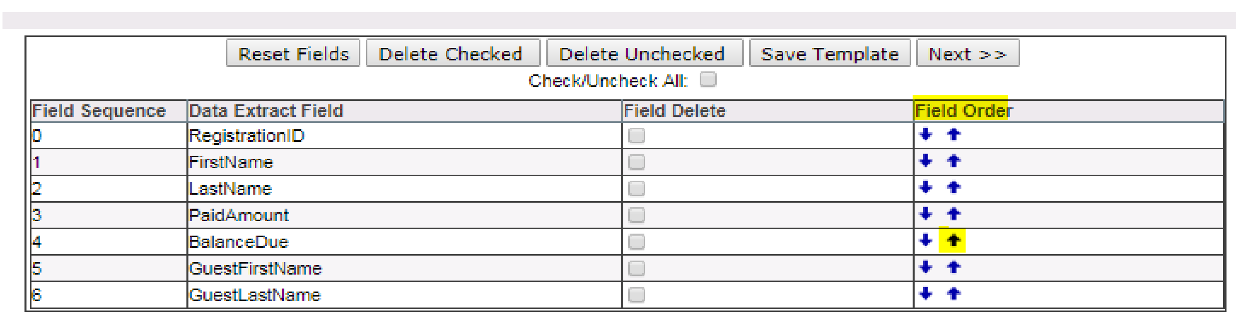
Select and order fields for your extract

Reset Fields | Delete Checked | Delete Unchecked | Save Template | Next >>

Check/Uncheck All:

Field Sequence	Data Extract Field	Field Delete	Field Order
0	RegistrationID	✓	
1	ValleyID		

8. Sentinel displays only the selected fields for the report, and the fields will display in the report in the order listed. To change the order, use the **Field Order** up-and-down arrows. We would prefer that **Balance Due** appears in the report before **Amount Paid**. To change the **Field Sequence**, click the upward pointing arrow next to **Balance Due**.

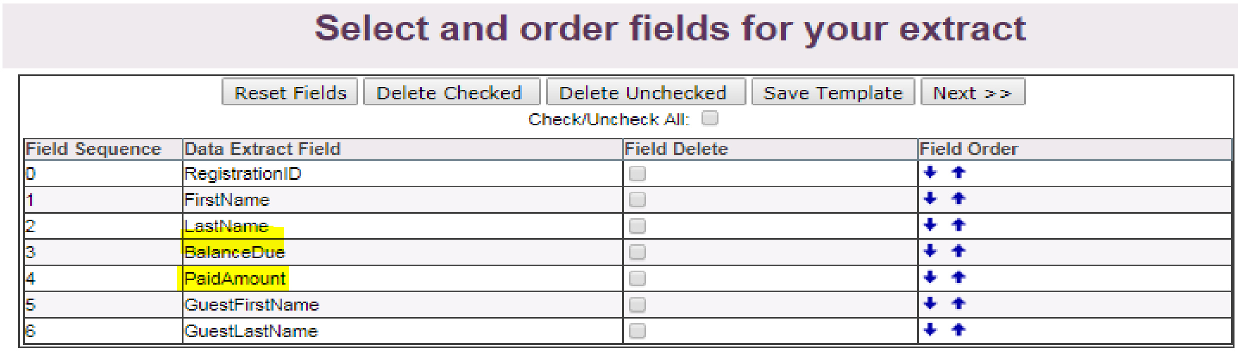


Reset Fields | Delete Checked | Delete Unchecked | Save Template | Next >>

Check/Uncheck All:

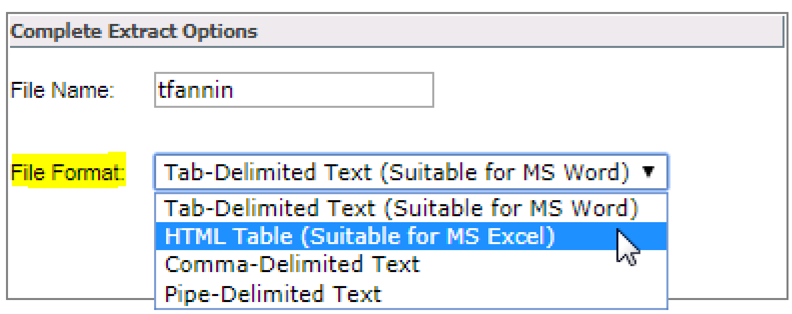
Field Sequence	Data Extract Field	Field Delete	Field Order
0	RegistrationID		
1	FirstName		
2	LastName		
3	PaidAmount		
4	BalanceDue		
5	GuestFirstName		
6	GuestLastName		

Now, the Balance Due is displayed above Amount Paid.



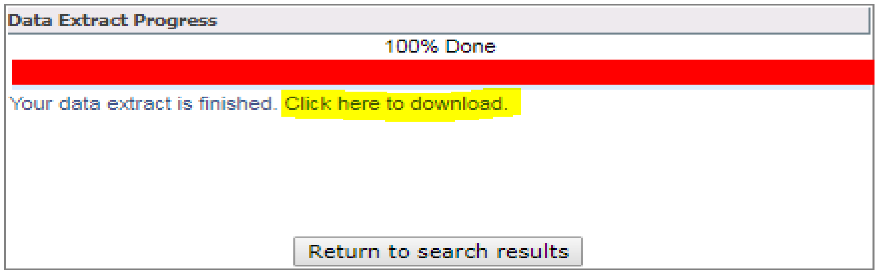
9. Now that the fields are in the correct order, click the **Next** button.

10. Choose the **File Format**. We will use **HTML Table (Suitable for MS Excel).**



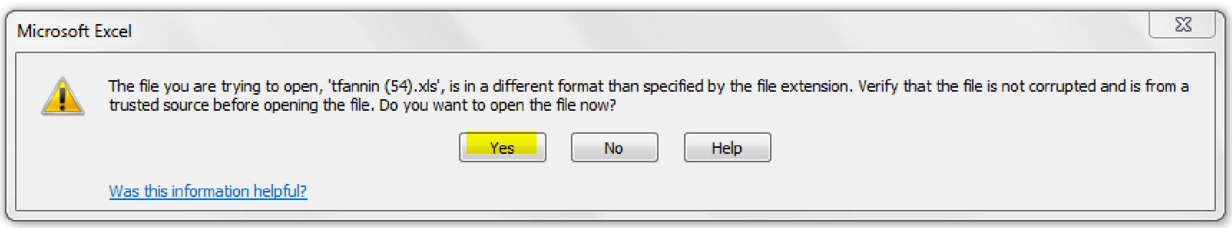
11. Click the **Run** button.

12. Click on **Click here to download**.



13. Google Chrome displays the download in the lower left corner of your screen. If you are using another browser, check your browsers instructions if you do not know how to open a downloaded document.

14. If this message appears, it means that you are using a version of Excel that is different that Sentinel's version. Click **Yes** to continue.



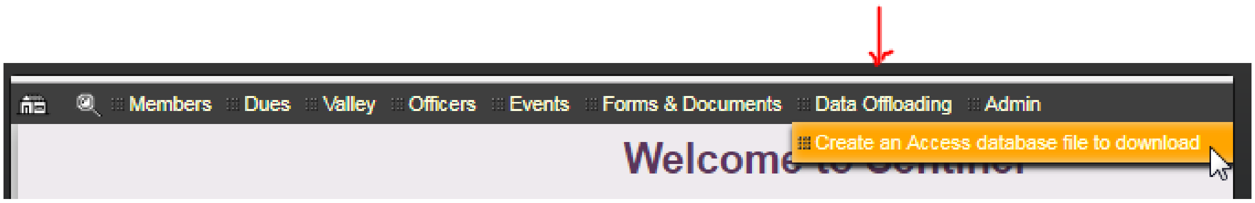
15. Sentinel displays the finished check-in report. We can see which registrants are paid and unpaid. At this point you can customize your Excel spreadsheet. We will manually add a column named **Attended** that can be used at the event to record members who actually attended.

RegistrationID	FirstName	LastName	BalanceDue	PaidAmount	GuestFirstName	GuestLastName	Attended
132903	Stuart	Johnson	40	0			
133056	Daniel	Anderson	40	40	Laura	Anderson	
133057	Carnell	Franklin	40	40	Jessica	Franklin	

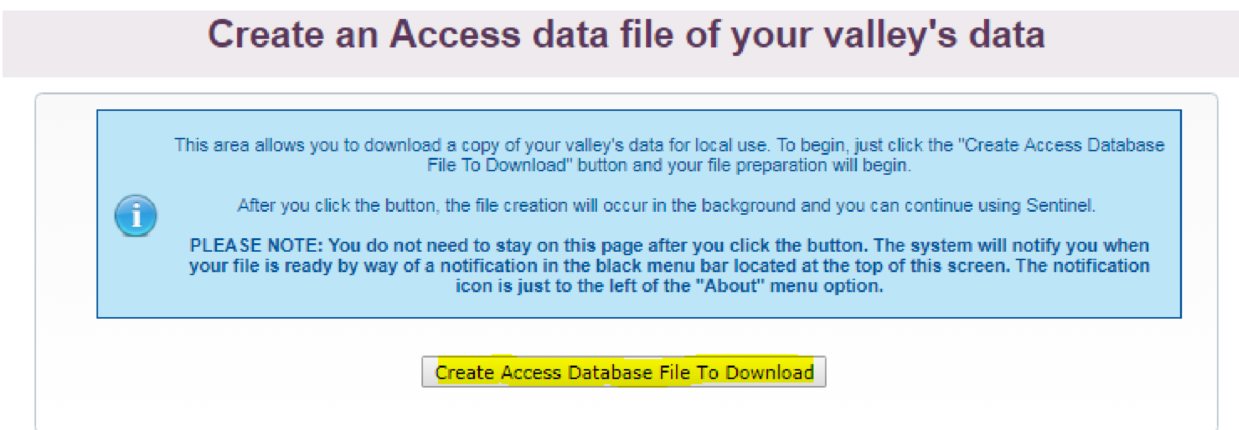
Data Offloading allows the user to create a Microsoft Access database file that can be imported into Microsoft Access for local Valley use.

Follow these instructions to create the data file:

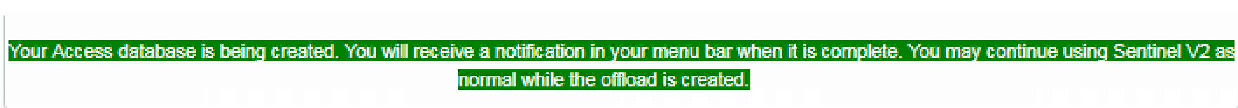
1. Data Offloading is located on Sentinel's black menu bar. Hover your mouse pointer over **Data Offloading** and click on **Create an Access database file to download**.



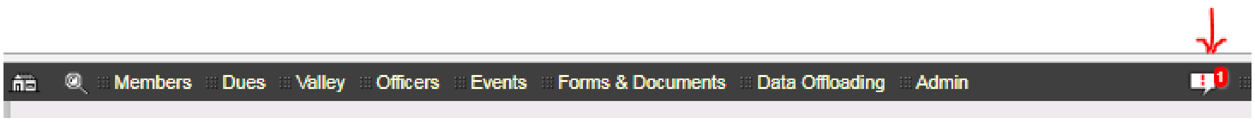
2. Click **Create Access Database File to Download**. As explained in the instructions in blue below. You do not have to stay on the download page while the file is being created. Sentinel will notify you when the file is complete.



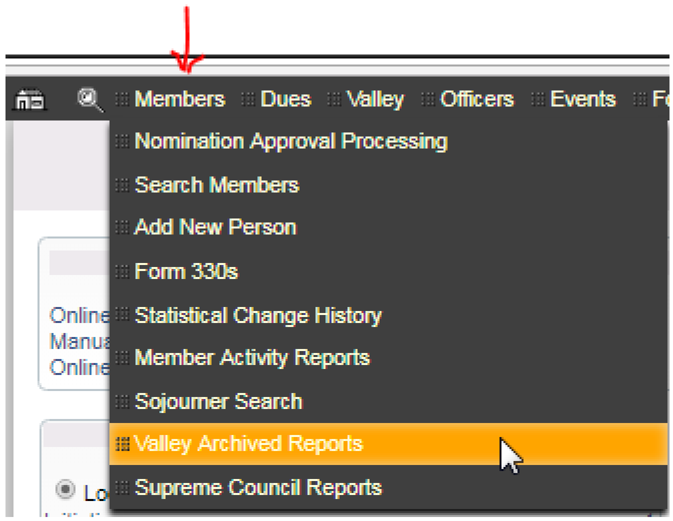
3. When you click the Download button, this message will appear:



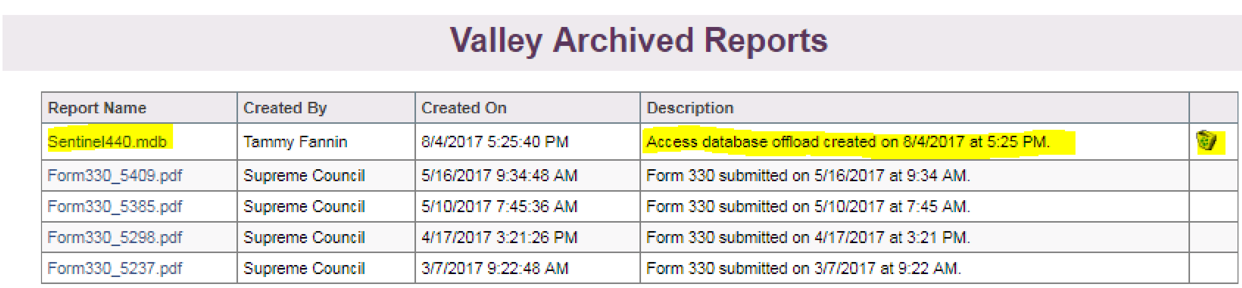
4. When the file is completed. Sentinel will display a red notification signal on the black menu bar.



5. The file is downloaded to **Valley Archived Reports** located on the **Members** menu on Sentinel's black menu bar.



6. Click on **Valley Archived Reports** to display the download. The file extension "mdb" indicates that this is a Microsoft database file that can be imported into Microsoft Access. The file may be deleted at any time by clicking the trash can that is located at the right of the entry.



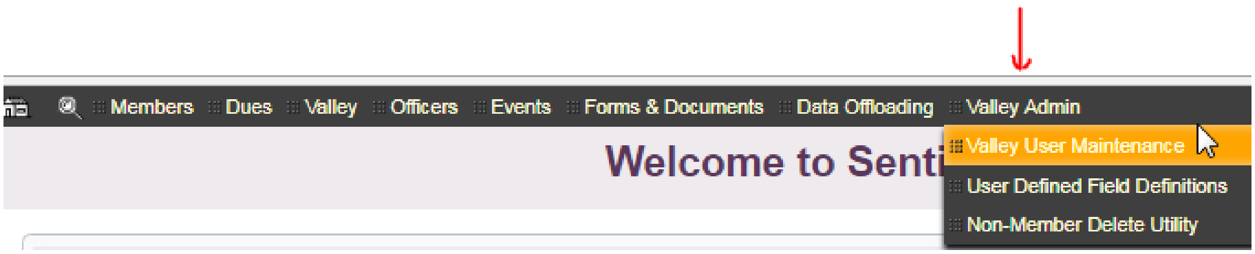
Valley Archived Reports

Report Name	Created By	Created On	Description	
Sentinel440.mdb	Tammy Fannin	8/4/2017 5:25:40 PM	Access database offload created on 8/4/2017 at 5:25 PM.	
Form330_5409.pdf	Supreme Council	5/16/2017 9:34:48 AM	Form 330 submitted on 5/16/2017 at 9:34 AM.	
Form330_5385.pdf	Supreme Council	5/10/2017 7:45:36 AM	Form 330 submitted on 5/10/2017 at 7:45 AM.	
Form330_5298.pdf	Supreme Council	4/17/2017 3:21:26 PM	Form 330 submitted on 4/17/2017 at 3:21 PM.	
Form330_5237.pdf	Supreme Council	3/7/2017 9:22:48 AM	Form 330 submitted on 3/7/2017 at 9:22 AM.	

CHAPTER 13: VALLEY ADMIN

Only Sentinel users with a Valley Admin permission level will have access to the Valley Admin menu. Each Valley should have a Sentinel Valley Administrator. This person is usually the Valley Secretary, although a Valley may have multiple Sentinel Valley Administrators. Administrators can create, edit, and delete Sentinel user accounts, create User Defined Labels, and delete non-member records.

Sentinel Valley Administrators will see the Valley Admin tab displayed on Sentinel's black menu bar. The Valley Admin menu displays three options: Valley User Maintenance, User Defined Field Definitions, and Non-Member Delete Utility.



The following sections will explain these three menu options and their features in detail.

13.1 VALLEY USER MAINTENANCE

The Valley Admin tab is only visible on Sentinel black menu bar for Sentinel Valley Administrators. Administrators can create, edit, and delete Sentinel accounts for users in their Valley. **PLEASE NOTE! Orient User Accounts must be authorized by an SGIG or Deputy, and can only be created by the Supreme Council Computer Services staff at the direction of the SGIG or Deputy.**

13.1A DISPLAYING USER ACCOUNTS

To display **Valley User Accounts**, follow these instructions:

1. On the **Valley Admin** tab on Sentinel's black menu bar, click on **Valley User Maintenance** to open the **Maintain Valley User's** page. This page will display all user accounts in your Valley. We are using a Test Valley for these instructions so that no real user information is shown. Your Valley's name will be displayed where you see, "Test Valley."

   The table displays the Login Name of the user and Valley name. If any users in your Valley have an Orient account, the Orient name will be displayed where you see, "US" in the table below. The table also displays the date and time that the user last logged into Sentinel. If no date and time is shown, the user has not accessed the system.

Maintain Valley Users

User accounts displayed below are your valley accounts or accounts from valleys within your current selection.

Add New User

Login Name	Valley Name	Orient Name	Last Login
lmason	Test Valley		
qcarter	Test Valley		
TestOrient	Test Valley	US	3/8/2017 2:44:21 PM
tlfannin	Test Valley		8/4/2017 8:03:52 PM

2. To see the user's full account, click on his or her **Login Name**. The user account should resemble the following. Passwords are encrypted in the database and are not visible to any user. The User Screen Permissions show that Larry Q. Mason is a Valley Level Admin with the highest permission level.

Larry Q. Mason

Save Add Delete Return

Login Name:	lmason
NEW Password:	
NEW Password Confirmation:	
Full Name (First and Last):	Larry Q. Mason
Email:	lqm@comcast.net

Last modified by tlfannin on 10/4/2016

User Screen Permissions

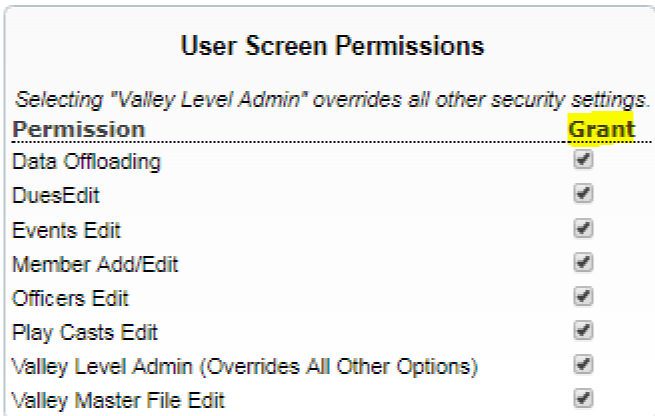
Selecting "Valley Level Admin" overrides all other security settings.

Permission	Grant
Data Offloading	☑
DuesEdit	☑
Events Edit	☑
Member Add/Edit	☑
Officers Edit	☑
Play Casts Edit	☑
Valley Level Admin (Overrides All Other Options)	☑
Valley Master File Edit	☑

13.1B USER PERMISSION LEVELS

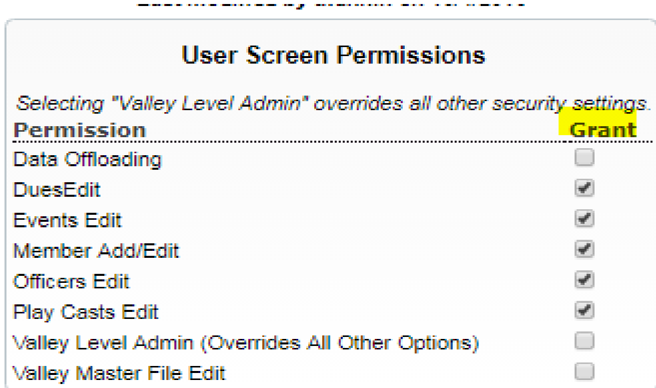
In the previous version of Sentinel there were three permission levels: Valley Administrator, Valley User, and Read Only. Sentinel still allows for these permission levels, but there is more flexibility to choose what areas of Sentinel a Valley User may update. Here are the permission level definitions:

1. A **Sentinel Valley Administrator** has full permission and is set by granting all permission levels as in the following display.

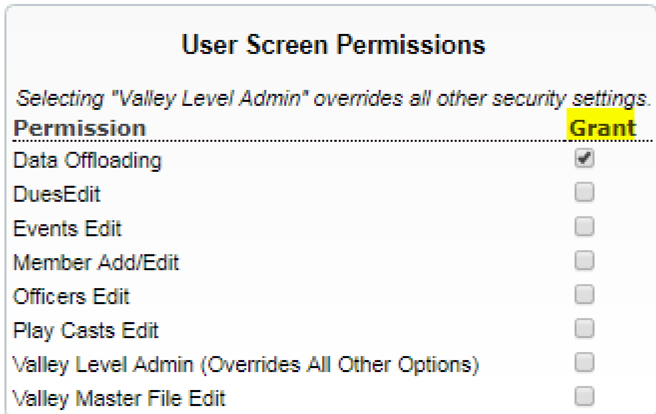


2. A **Valley User** is allowed to update member information in accordance with the permissions selected for the user. **PLEASE NOTE: A Valley User should never have Valley Level Admin checked, as this will result in making the user a Valley Administrator with full permissions.**

   In the following display, the **Valley User** may update information only in the Sentinel areas checked. This Valley User can enter and edit dues payments, Event information, new member information, Officer information, and Play Cast information. The **Valley User** will *not* have access to the **Valley** tab to update Valley contact information or set dues rates and so forth, nor will the user have the **Valley Admin** tab displayed on the menu bar.



3. A **Read Only** account user may view member information but cannot edit any information. The **Read Only** account will have no permission granted with the exception of **Data Offloading** if the Valley chooses to grant this permission.

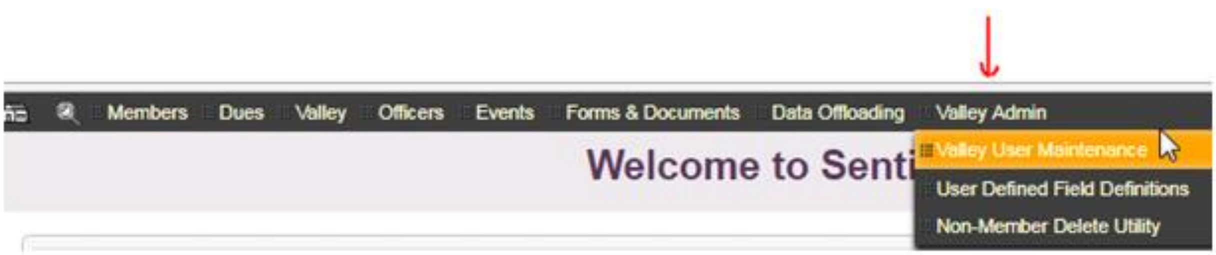


13.1C ADDING A NEW USER

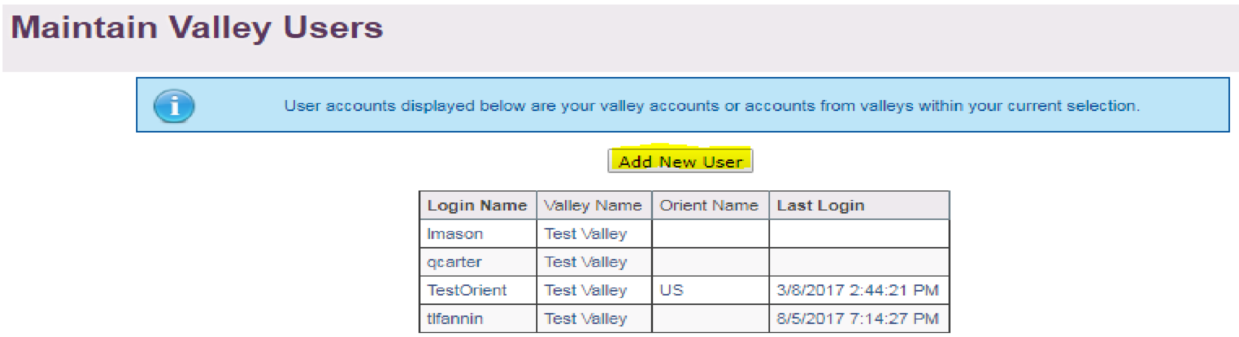
Only Sentinel Valley Administrators may add new Sentinel user accounts. This section assumes that the Valley Administrator understands the different user permission levels. If not, please see the previous section explaining **User Permission Levels.**

Follow these instructions to create a new user account:

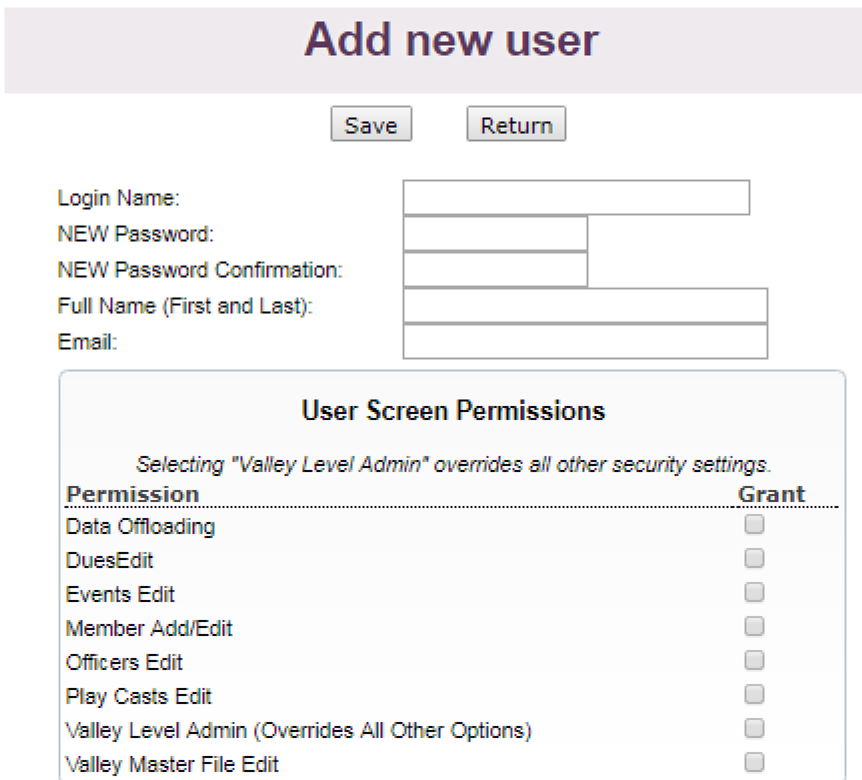
1. Hover the mouse pointer over **Valley Admin** on Sentinel's black menu to open the menu. Click on **Valley User Maintenance**.



2. The **Maintain Valley Users** page opens. Click on **Add New User**.



3. The **Add New User** page opens.



3a. Enter a **Login Name** that contains the user's first initial and last name. Do not create accounts with general Login Names like "Guest" or "Valley." All user accounts must be identified by a person's name.

IMPORTANT! Never create a user account for general users such as "Guest" or "Valley." Always use the first initial and last name of the user.

PLEASE NOTE: When you save the new user information, if you receive a message that the Login Name is already in use, insert the user's first and second initial and last name as the Login Name.

3b. Enter a password of at least eight character spaces with at least one uppercase letter and one number. Confirm the password.

3c. Enter at least the first and last name of the user.

3d. Enter the email address of the user. The Supreme Council Computer Services will use this email address contact the user with Sentinel information and updates. Keep these emails up to date.

3e. Set the user's permission level by checking the permission checkboxes that apply. If you are unsure of the permission levels, see the previous section, **User Permission Levels.**

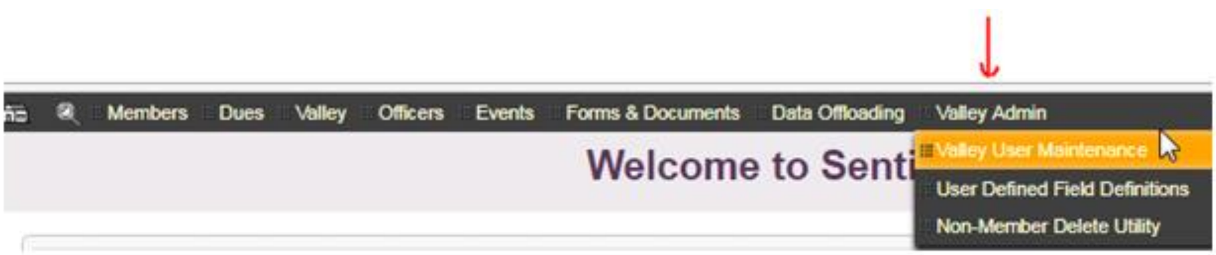
4. To finish, click the Save button at the top of the page.

13.1D DELETING A USER ACCOUNT

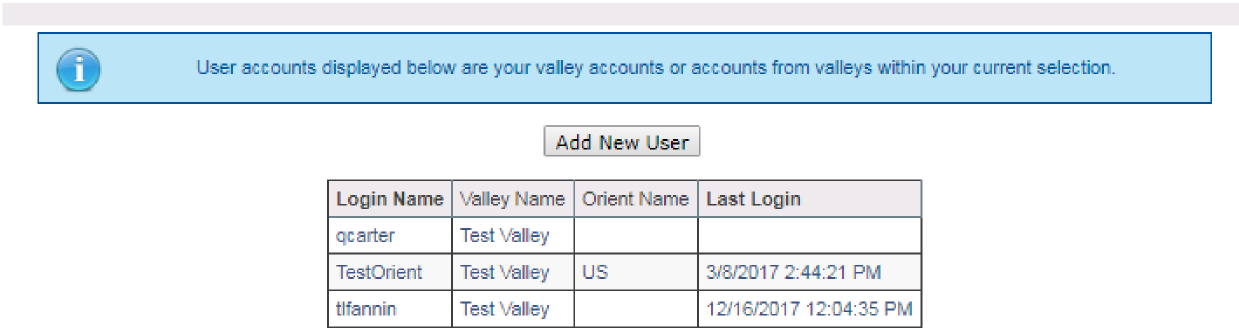
It is the Valley Sentinel administrator's responsibility to delete unused Sentinel accounts and "generic" accounts such as "Guest" or "ScottishRite," as these accounts pose a security risk. When a Sentinel user retires or their position is terminated for any reason, the administrator will delete the account immediately.

Follow these instructions to delete unused or generic user accounts.

1. Hover the mouse pointer over **Valley Admin** on Sentinel's black menu to open the menu. Click on **Valley User Maintenance**.

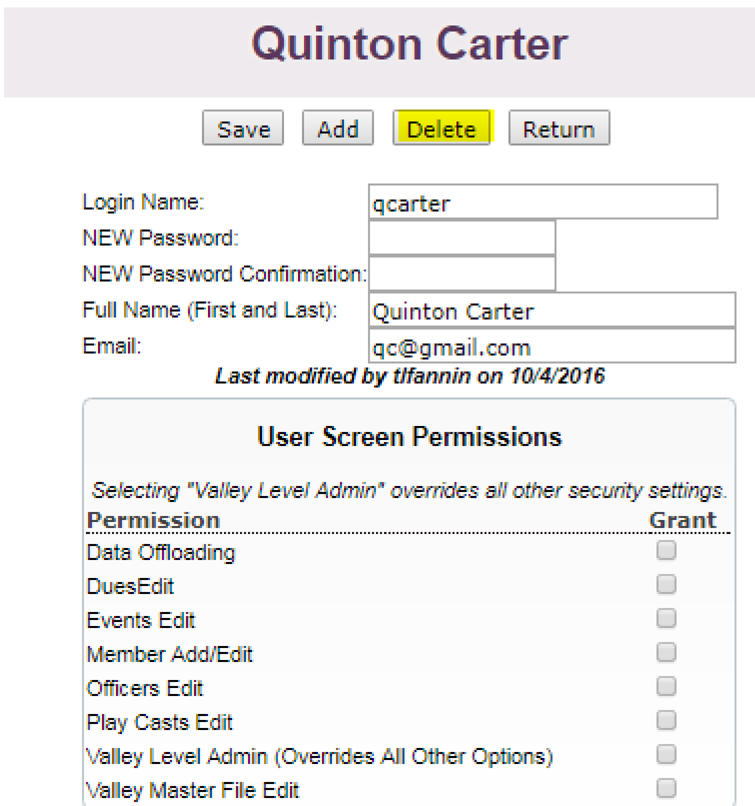


2. The **Maintain Valley Users** page opens to display all the user accounts. To delete an account, click on the **Login Name** of that account. For this example, we will delete the account with Login Name "qcarter."



Login Name	Valley Name	Orient Name	Last Login
qcarter	Test Valley		
TestOrient	Test Valley	US	3/8/2017 2:44:21 PM
tlfannin	Test Valley		12/16/2017 12:04:35 PM

3. Click on the name to open that user's account. Your user account page should be similar to the following.



4. Click the **Delete** button to permanently remove the account.

13.1E CREATING USER DEFINED FIELD DEFINITIONS

User Defined Fields are additional fields that a Sentinel Valley Administrator creates to hold additional information about a Brother. These fields are unique to your Valley—that is, the fields that a Valley Administrator creates in his Valley will not be visible in another Valley. Once created, these fields appear on the Profile page (main member record) for all members.

The following **User Defined Fields** were created for a Valley. The display shows that this member was sent a birthday card and also a get well card. The KSA box is checked indicating that he is a member of the Knights of St. Andrew. The number of **User Defined Fields** that a Valley can create is unlimited.

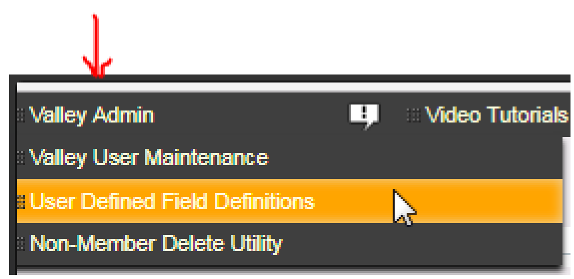
A Sentinel Valley Administrator may create an unlimited amount of User Defined Fields.

User defined fields for this person Save User Defined Field Values

Field	Value	Last Modified On	Last Modified By
Birthday Card Sent	1/26/2016		
Get Well Card	5/6/2017		
KSA	☑		

Follow these instructions to create **User Defined Field Definitions:**

1. Hover the mouse pointer over **Valley Admin** on Sentinel's black menu bar. Click on **User Defined Field Definitions.**



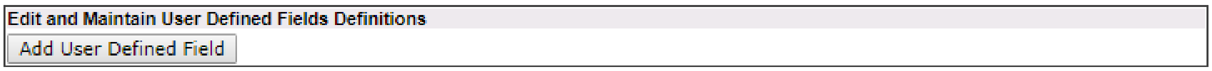
2. The **User Defined Fields** page opens. Your Valley may already have User Defined fields. If so, your page may resemble the following:

Edit and Maintain User Defined Fields Definitions

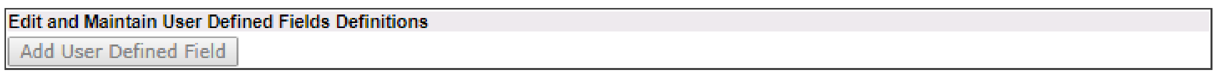
Screen Sequence	Screen Label	Field Data Type	Maximum Field Length	Validation Type	
1	Birthday Card Sent	Date	10		
2	Get Well Card	Date	10		
2	KSA	Checkbox	10		

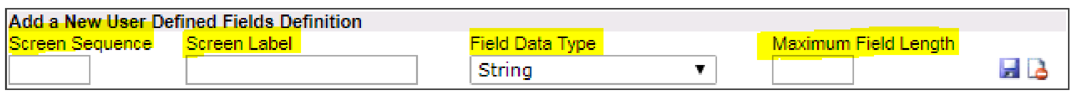
Add User Defined Field

If your Valley does not have User Defined Fields already created, your page will be blank as in the following display:



3. To create a new field, click on **Add User Defined Field**. The add page will open.





4. Next, enter information about your new field.

   4a. The **Screen Sequence** tells Sentinel the order in which the field will be displayed (1,2,3,4, etc.) if you have multiple User Defined Fields.

   4b. The **Screen Label** is the name of the new field such as **Birthday Card Sent**.

   4c. The Field Data Type defines the field format such as date, character string (text field), money, or checkbox.

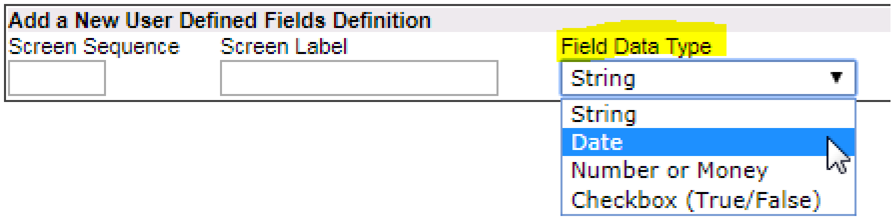
   4d. The Maximum Field Length is the total number of character spaces needed for the field.

5. As an example, we will create a User Defined Field for **Birthday Card Sent** that will have a Screen Sequence of 1, a Field Data Type of "Date," and a Maximum Field Length of 10 (10 spaces are needed for a date.

   5a. Enter the number "1" (no quotes) in the Screen Sequence box.

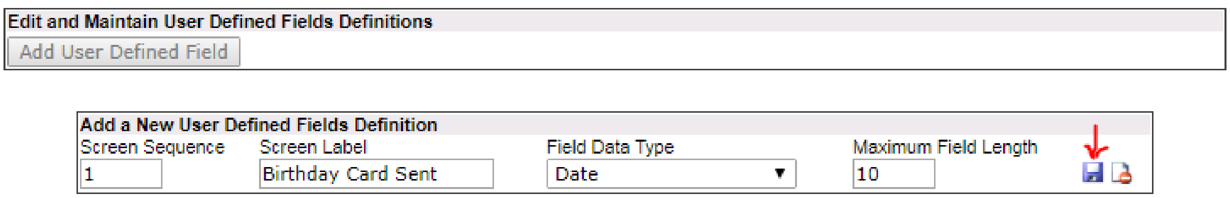
   5b. Enter **Birthday Card Sent** in the Screen Label box.

   5c. Click the downward arrow under **Field Data Type** to open the menu. Click on **Date** to select it.



5d. Enter the number "10" (no quotes) in the **Maximum Field Length** box to allow for ten storage spaces.

6. Your completed form should resemble the following display. Click the **Save** icon to finish and save. The **Save** icon is indicated by the red arrow below.



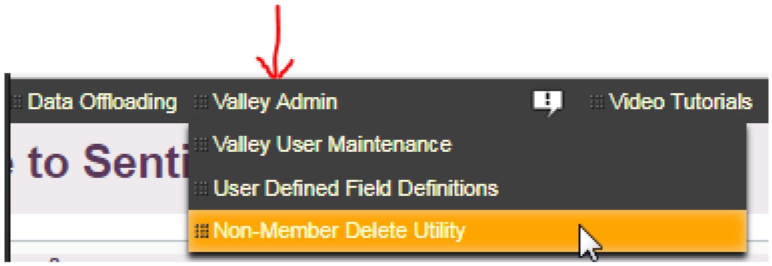
PLEASE NOTE: Regardless of the Field Data Type needed (String, Date, Number or Money, Checkbox), you will follow the same steps to create your new field. However, when creating a True or False Checkbox, you will still need to enter a Maximum Field Length. You may enter the number 10.

13.1F NONMEMBER DELETE UTILITY

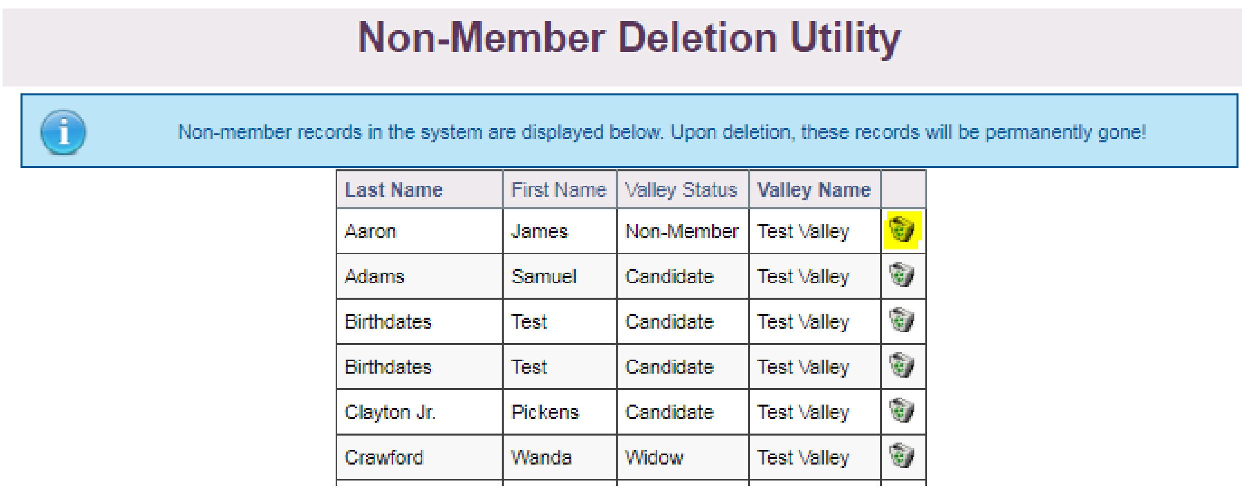
Valleys may add new Degree Candidates at any time as well as records such as those for Blue Lodges, widows, and other members not affiliated with their Valley. Usually, the purpose for adding non-members is to send them a Valley bulletin or other information. These records are controlled by the Valley—that is, Valley Administrators or Valley users create the records, and it is the Valley's responsibility to maintain their information. However, only a Sentinel Valley Administrator may delete these **Non-member** records when they are no longer needed. Also, a Sentinel Valley Administrator may delete a **Candidate** record if that record was entered incorrectly, or if the Candidate decides not to participate in a Reunion or if the **Candidate** record was mistakenly added more than once resulting in duplicate records.

Follow these steps to delete unneeded **Candidate** or **Non-member** records.

1. Hover the mouse pointer over **Valley Admin** on Sentinel's black menu bar. Click on **Non-member Delete Utility.**



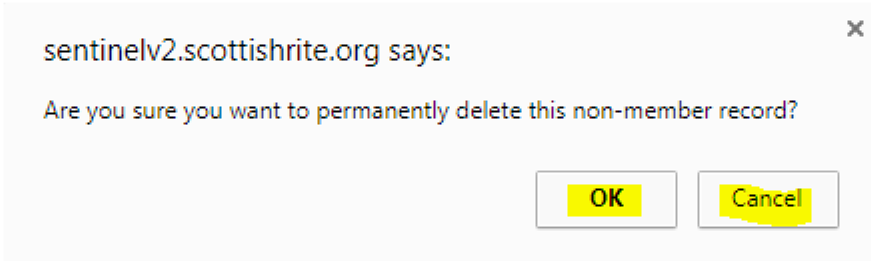
2. The **Non-Member Deletion Utility** page opens and displays all of the records that are eligible for deletion. To delete a record, click the **Trashcan icon** to the right of the name.


Non-Member Deletion Utility

Non-member records in the system are displayed below. Upon deletion, these records will be permanently gone!

Last Name	First Name	Valley Status	Valley Name	
Aaron	James	Non-Member	Test Valley	
Adams	Samuel	Candidate	Test Valley	
Birthdates	Test	Candidate	Test Valley	
Birthdates	Test	Candidate	Test Valley	
Clayton Jr.	Pickens	Candidate	Test Valley	
Crawford	Wanda	Widow	Test Valley	

3. Sentinel will ask if you are sure you want **to permanently delete this non-member record** (Candidates are considered non-members until they are reported to the Supreme Council on Form 330). Click on **OK** to delete the record, else click on **Cancel** to proceed without deleting. When you click the **OK** button, Sentinel will redisplay the list of non-members, and the deleted record will be gone. Once a record is deleted, it cannot be restored without manually adding the entire record once again.



13.2 ORIENT USER ACCOUNTS

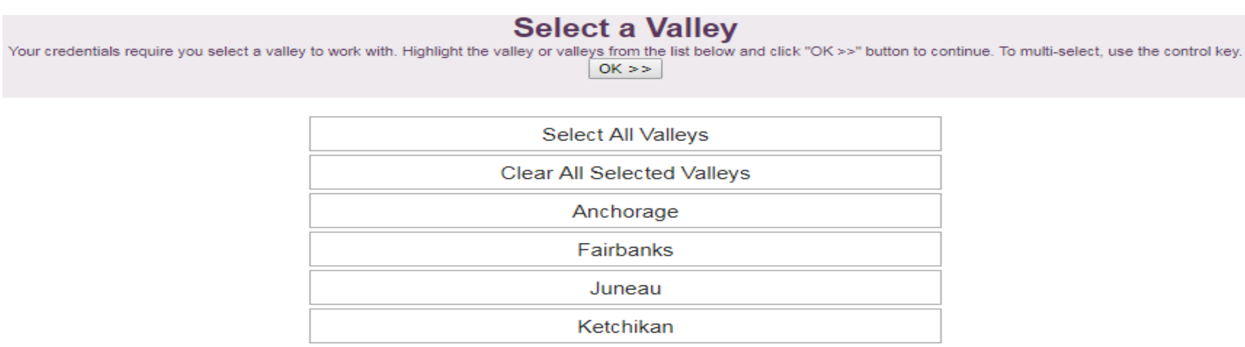
An Orient-wide account allows the user access to all Valleys in the Orient. SGIGs and Deputies all have Orient accounts. Additionally, the SGIG or Deputy may designate others to have Orient accounts. Orient accounts are created by the Supreme Council Computer Services staff and only after written authorization from an SGIG or Deputy.

An Orient account allows for the following functions:

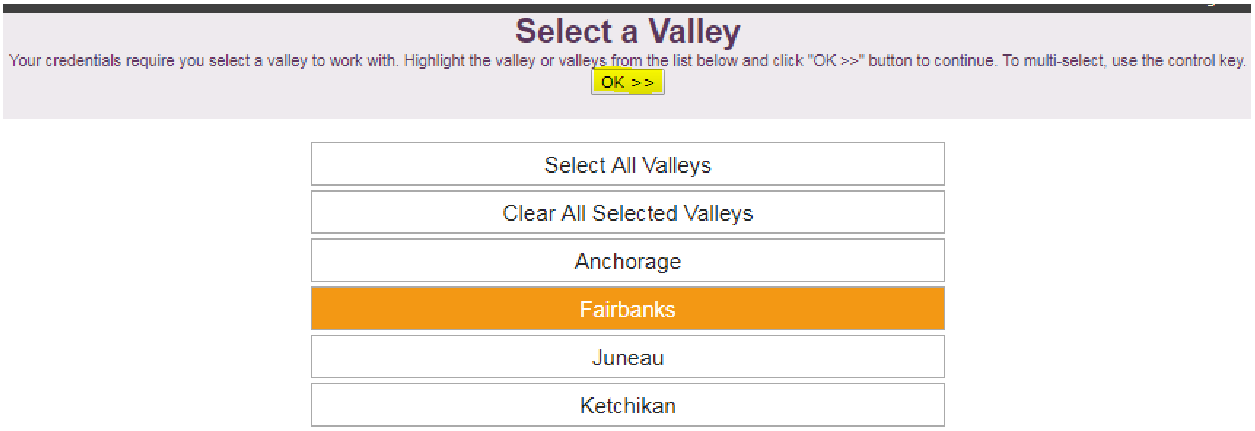
1. Access all of the Valleys in an Orient using one username and password
2. Perform search among all Valley in an Orient in one search.
3. Toggle among Valleys in one Orient without logging out of Sentinel to choose another Valley
4. View the Welcome Screen statistics for each Valley without logging out of Sentinel to choose another Valley

13.2A ORIENT ACCOUNT: ACCESS A SINGLE VALLEY

When a regular Valley user logs into Sentinel, that user will have access to only one Valley. By comparison, when an Orient user logs into Sentinel, he or she will see all Valleys displayed as in the following display for an Orient user account for Alaska.

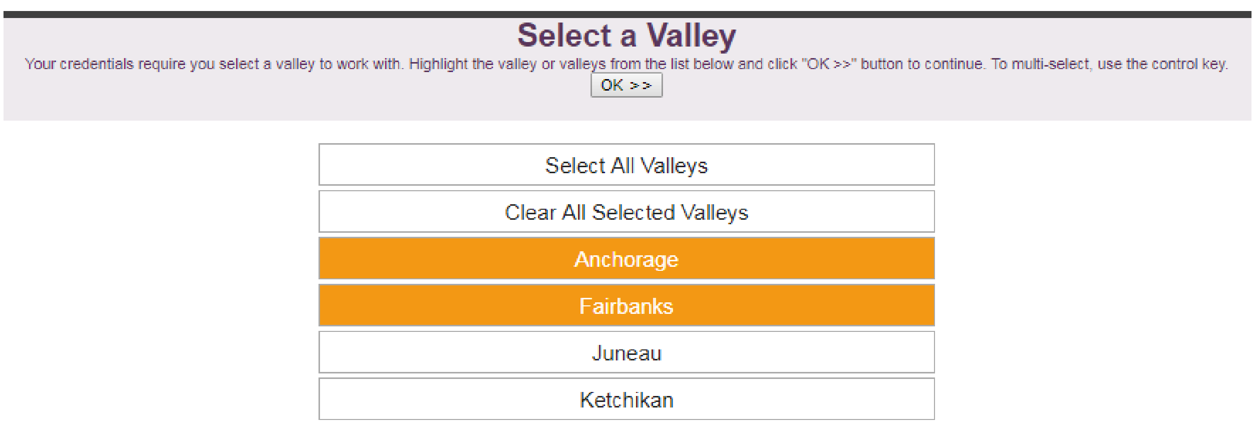


To access a single Valley, click on the Valley name to highlight it, and then click the **OK** button under **Select a Valley.** Sentinel will open to that Valley's **Welcome to Sentinel** page.

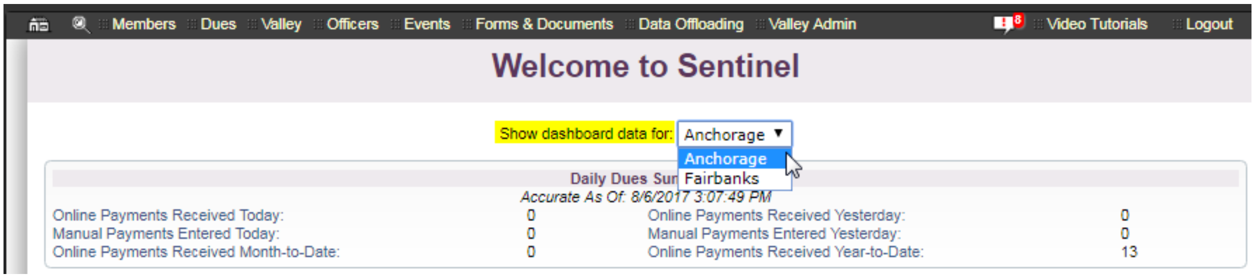


13.2B ORIENT ACCOUNT: ACCESS MULTIPLE VALLEYS

Once the Orient user has logged in to Sentinel, the list of Valleys in the Orient are displayed. To access more than one Valley, but not all Valleys, click on the Valley name to select them as in the following display. Next, click the **OK** button.



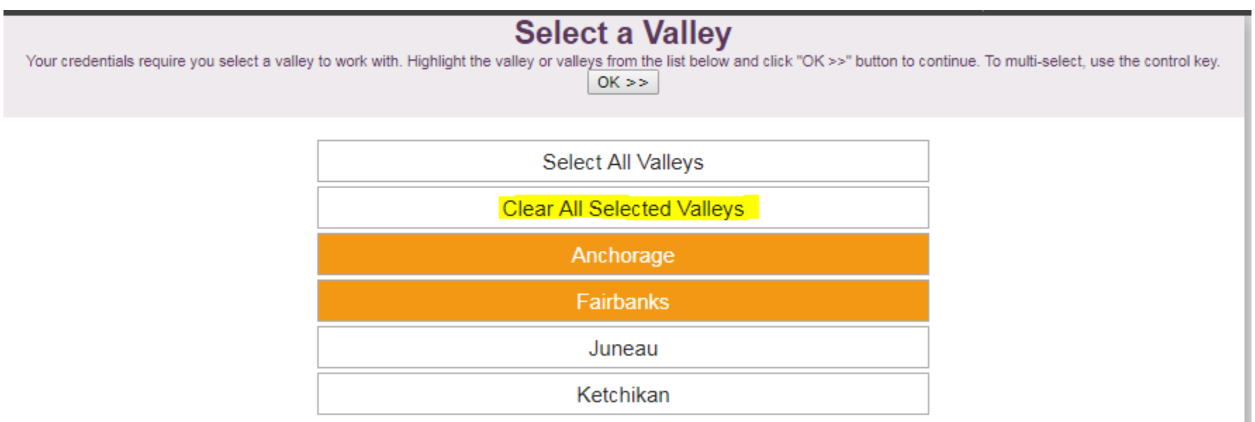
Sentinel will display the **Welcome to Sentinel** page for the first Valley. To change to the Welcome screen to the second Valley selected, use the dropdown arrow next to **Show dashboard date for** and click on the Valley name in the menu.



To return to the **Select a Valley** page, click the link in the lower right corner of the Sentinel that displays the following:

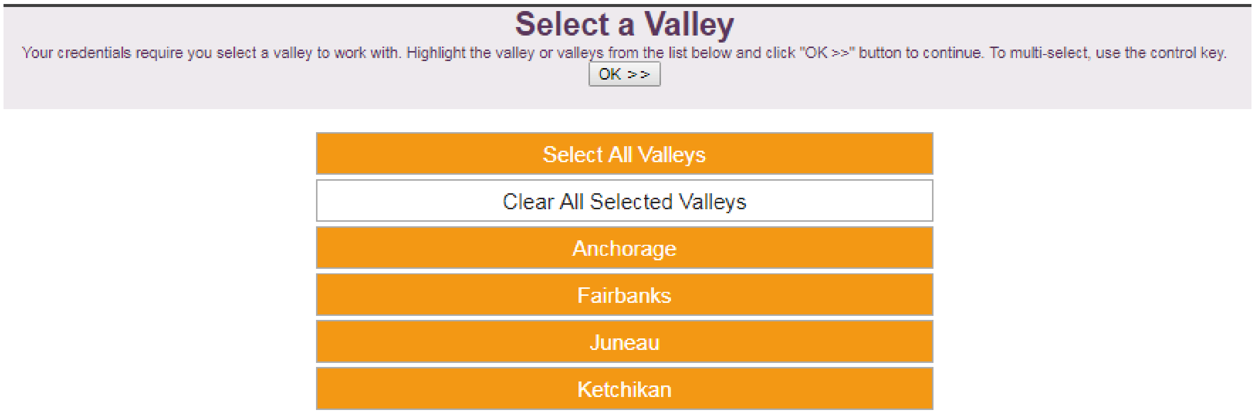
Change Valley Selection (4 currently selected)

This action will take you back the to Select a Valley page as seen below. Sentinel retains the last Valley or Valleys that were accessed, thus it is a good practice to click on **Clear All Selected Valleys** before making another selection.

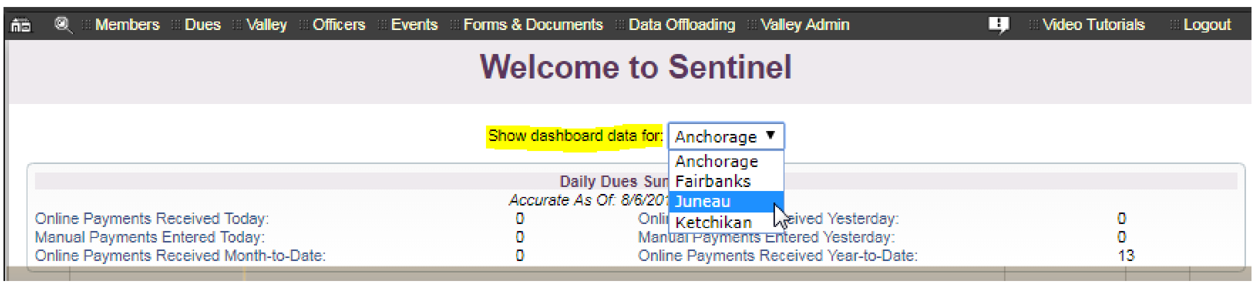


13.2C ORIENT ACCOUNT: SELECT ALL VALLEYS

After logging into Sentinel, an Orient user may access all Valleys in the Orient by simply clicking **Select All Valleys** as in the following display.



Sentinel will open to the Welcome to Sentinel page for the first Valley in the list. However, the user can toggle among Valleys by clicking the downward arrow next to **Show dashboard data for** and clicking a Valley name.



Sentinel will also indicate that 4 Valleys are selected by displaying the following message in the lower right corner of the screen. You may click this link at any time to return to the **Select a Valley** page.

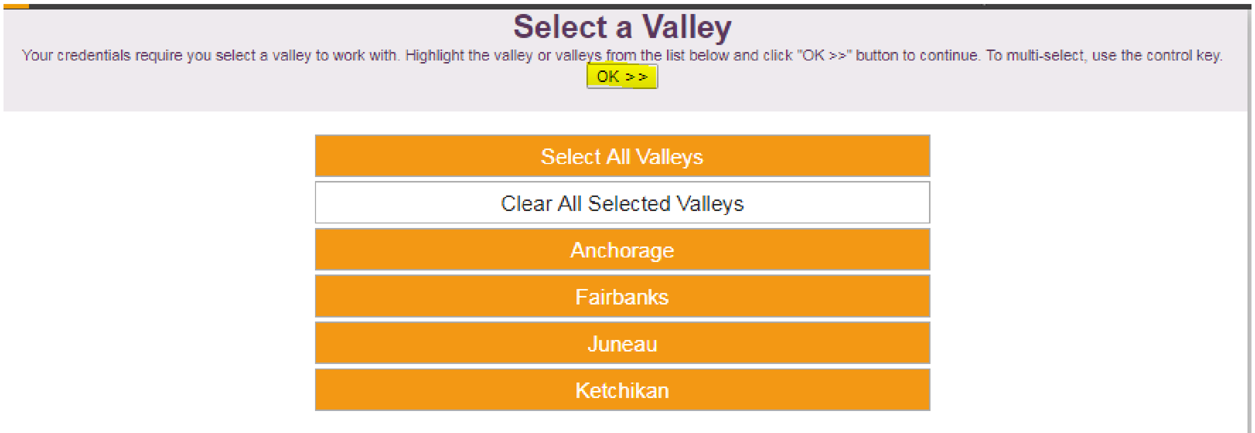
Change Valley Selection (4 currently selected)

13.2D ORIENT ACCOUNT: PERFORMING MULTIPLE VALLEY SEARCHES

Multiple Valley searching allows an Orient user to create aggregate reports without logging into each Valley in the Orient and performing separate searches. Select all Valleys on the **Select a Valley** page and then perform the search. Sentinel will query all Valleys in the Orient and return a total amount.

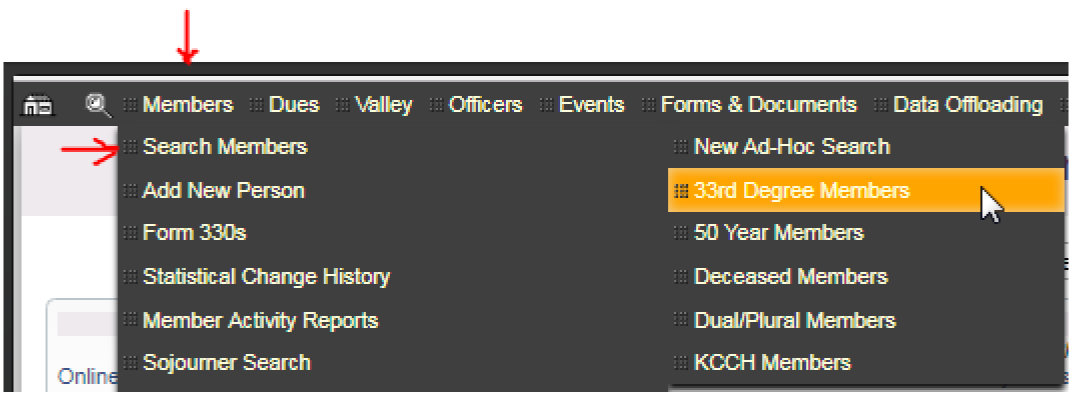
For this example we will search for all 33° members in the State of Alaska.

1. Log in to the Orient account and click on **Select all Valleys**. Click the **OK** button.

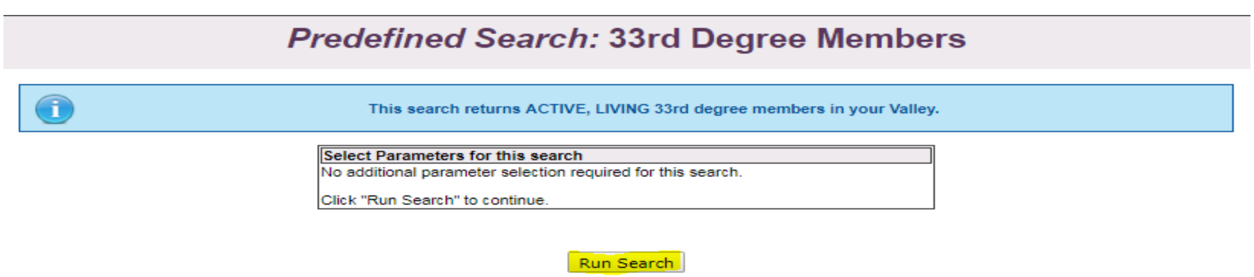


2. All searches, extracts, and reports work the same when multiple Valleys are selected. Thus, all of the instructions in this manual that apply to single-Valley search apply to multiple-Valley searches as well.

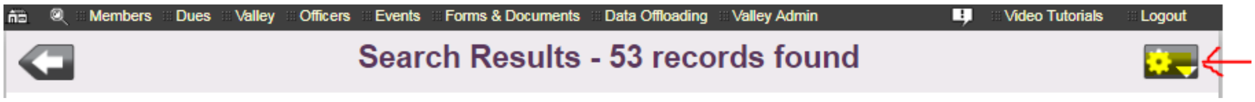
   To search for 33° members among the Valleys selected, hover the mouse pointer over **Members** on Sentinel's black menu bar. Then hover the mouse pointer over **Search Members**. On the submenu, click on **33rd Degree Members** to select it.



3. The ***Predefined Search*: 33rd Degree Members** page opens. Click on **Run Search**.



4. Sentinel returns 53 members who are 33° among the four Valleys in Alaska. The names and addresses will also be displayed. For privacy reasons, we have excluded that information from the below display.



To create a detailed report, including contact information, phone number, email address, Valley affiliation, 33° date, and so forth, click the Gear in the upper right corner. For instructions on creating reports and data extracts, see **Chapter 6, Reports and Data Extracts.**

13.2E VALLEY MEMBER STATUS MAINTENANCE

Valley Member Status Maintenance allows a Sentinel administrator to create new status categories to assign to members. There are two statuses which are assigned by the system: Candidate and Pending SC Approval. In addition to these, the administrator can create other Valley Statuses as needed such as "Widow" or "Blue Lodge." The administrator creates the status using **Valley Member Status Maintenance** located on the **Admin** menu.

Never delete the Candidate or Pending SC Approval Status. They are required to complete a Form 330 for Initiates.

Follow these instructions to create a new **Valley Status**:

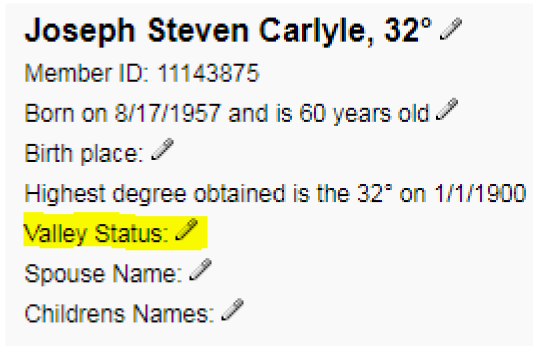
1. Hover the mouse pointer over **Admin** to open the menu. Click on **Valley Member Status Maintenance.**

2. For this example we will create a 50-Year Member status. Enter a **Status Code** which is a short description and enter the **Valley Status Description** which is the status name to be assigned to a member record. Next, click the **Add** button.

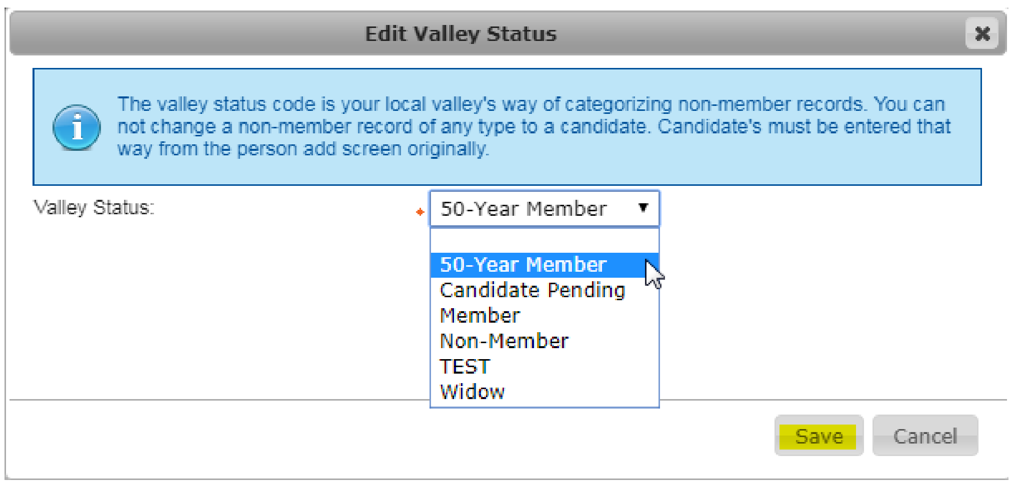
Valley Status Definitions

Valley Status Code	Valley Status Description	Number in Use	
CANDIDATE	Candidate	0	
Non Member	Non Member	1	
Pending	Pending SC Approval	0	
Widow	Widow	0	
50-Year	50-Year Member		Add

3. Now, to use the new Valley Status and assign it to a member, access that member's Profile page (main record). Click on **Valley Status** to open the menu.



4. Select **50-Year Member** from the dropdown menu. Click the Save button. The status is now assigned to the member's record on his Profile page.

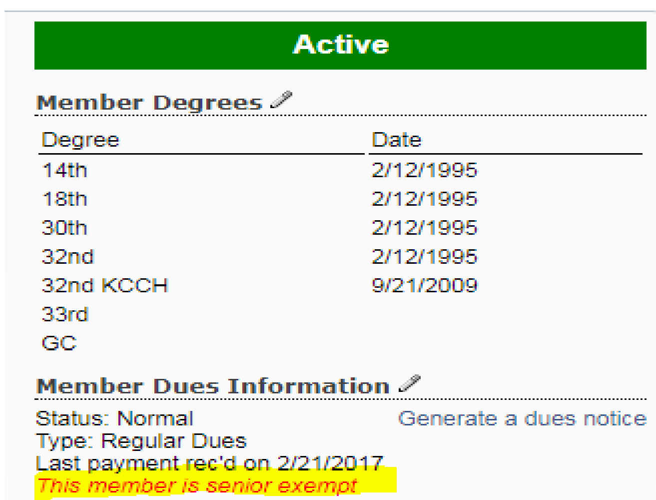


The Grand Commander may waive the Supreme Council's annual per capita assessment on certain "senior" members in conjunction with their Valley's waiving their annual dues. **Waivers, when granted by the Grand Commander, will be for one per capita year only.** To be eligible, members must meet at least one of the following criteria:

> **Valleys cannot enter a Senior Member status in Sentinel. This can only be done by the Supreme Council Computer Services staff after the senior exemption is approved by the Grand Secretary General upon receipt of a Form 80s.**

1. Be 80 years or older and in financial need
2. Be a 50-year member and in financial need

Valleys request a senior member waiver by submitting a Form 80(s) to the Office of the Executive Director. Computer Services emails this form to the Valley Secretary in March of each year. Completed forms must be signed by the Orient's Sovereign Grand Inspector General or Deputy. Once the form is received and approved by the Grand Executive Director, the Membership Services staff, adds the following statement to the senior member's Profile page in Sentinel under **Member Dues Information**.



This "senior status" will remain in the member's record until the final per capita assessment is performed on or about February 1 of each year. For example, the final per capita assessment for 2017 will be performed on or about February 1 of 2018. After that date, the senior status is removed for 2017, and the process begins anew for 2018.

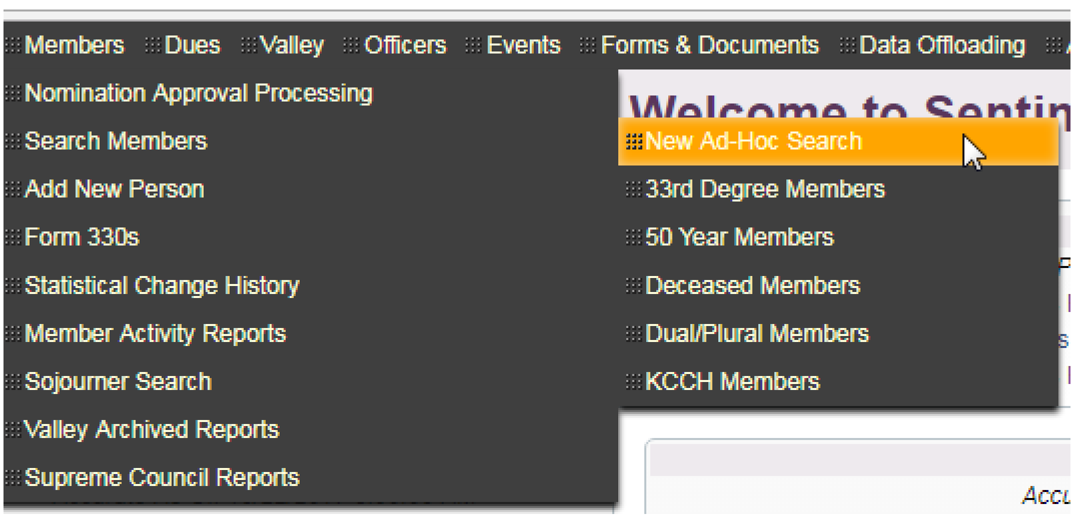
For Valley Billing Valleys (Supreme Council prints your Valley's dues notices), to ensure that members do not receive a dues notice with a balance due, the senior exemption Form 80(s) should be submitted between March and May of each year. The Computer Services staff will email a form and notify you of the deadline for submitting. Valleys that manage their own dues mailings (non-Valley Billing Valleys) have until December 31 to report.

*For additional information regarding the annual per capita assessment, see **The Statutes of the Supreme Council**, Article XI, Sec. 6 and the Valley Secretary's Manual.

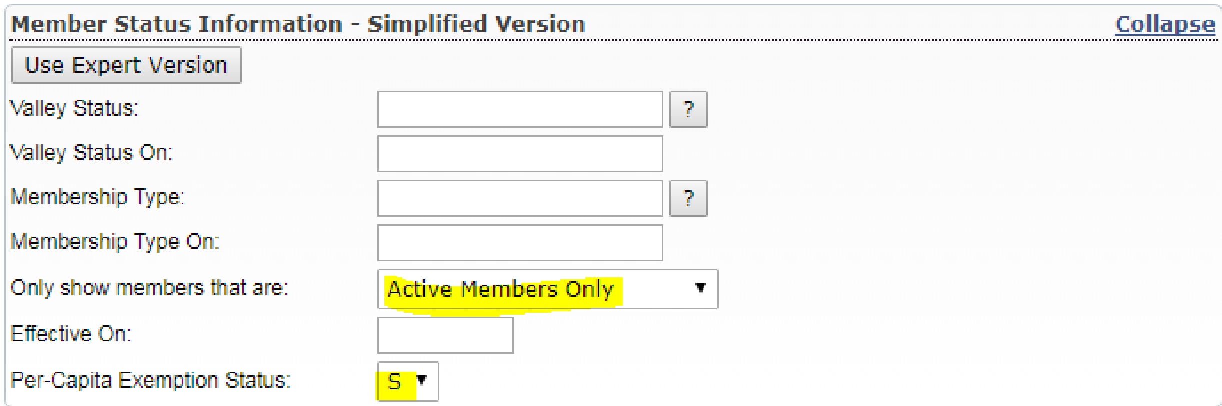
13.1 SENIOR MEMBER SEARCH

A Valley can search for Brother's with the Senior Member exemption and create reports. Follow these instructions to find all senior members in your Valley.

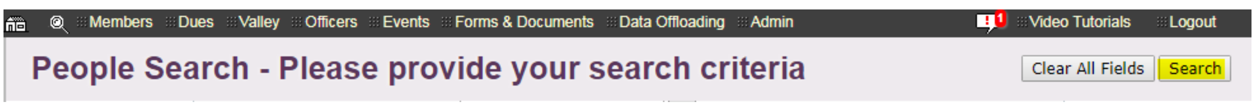
1. Click on **Members** on the black menu bar. On the submenu, position your mouse pointer over **Search Members**, and then slide to the next submenu and click on **New Ad-Hoc Search**.



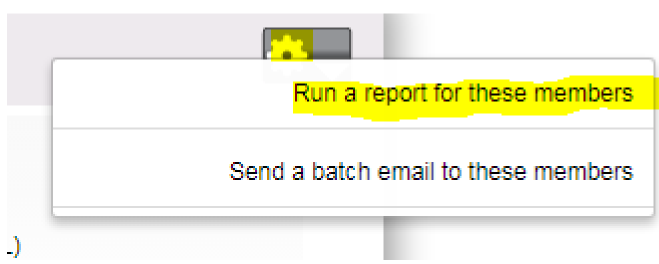
2. On the **People Search** page under **Member Status information – Simplified Version,** set "Only show members that are" to **Active Members Only**. For **Per-Capita Exemption Status**, select the "S" code for seniors.



3. Click the Search button in the upper right corner of the screen. The results will appear on your computer screen. Please note, if no results appear, check your search criteria. If your search criteria is correct, but no results were given, your Valley does not have any senior exemptions recorded.



4. To create a report for your seniors, click the gear in the upper right corner of the screen and choose **Run a report for these members**. On the report page, you may create a data extract that you build yourself, create mailing labels or envelopes, or choose from several pre-defined reports. These reports are covered in Chapter 3, Creating a Report Based on Search Results, thus we will not repeat the process here.



Alpha-Numeric Search Terms and Operators

There are many ways that you can search within Sentinel. The following is a list of helpful terms and operators that you can use.

"Is Null"	Matches anything where the field is blank.
"Is Not Null"	Matches anything where the field is not blank. '

Asterisks

"*"	Asterisk matches any characters

Examples:

"Martin*"	Matches anything beginning with "Martin". Would match Martin, Martinez, Martinize, Martini
"Mar*"	Matches anything beginning with "Mar". Would match Marlin, Martin, Martini
"*tin*"	Matches anything containing "tin". Would match Tin, Tines, Augustine, Abtin
"*"	Matches anything (including blank fields)

Underscores

"_"	Underscore Matches any single character

Examples:

"Mar_in"	Matches items with anything in the fourth position. Would match Martin, Marlin, Markin

Hyphens

"-"	Hyphen allows range searches

Examples:

"A-B"	Find anything beginning with the letters A or B. Would match Adams, Anderson, Benic, Brown

NOTE: If you want to look up something that has a hyphen and shouldn't be treated as a range search, enter a ~ (tilde) before the hyphen and it treats the hyphen as a literal search character. You cannot use other wildcard characters when searching with the tilde for a literal hyphen. Greater Than

“>” Greater than Matches values alphabetically after the criteria

Examples:

“> M” Matches anything beginning with an M and everything in the alphabet coming after the letter M. Would match Max, Maxine, Nancy, Paul

Less Than

“<” Less than matches values alphabetically after the criteria

Examples:

“< M” Matches anything beginning with letters before the letter M in the alphabet. This would match Adam, Bill, or John. However, it would *not* match Mark.

Date Field Searches:

“Is Null” Matches anything without a date.

“Is Not Null” Matches anything with a date (functions the same as wildcard "*").

Asterisks

“*” Asterisk Matches any dates

Examples:

“*” Matches any date.

Greater Than

“>” Greater than matches dates after the criteria date

Examples:

“> 01/01/2002” Finds anything after 1/1/2002. Would match 4/1/2002, 1/1/2003, etc. Would not match 1/1/2002 or before.

NOTE: the space between the greater than sign and the date is optional.

“>=” Greater than or equal to matches dates on or after the criteria date

Examples:

“>= 01/01/2002” Finds anything on or after 1/1/2002. Would match 1/1/2002, 4/1/2002, 1/1/2003, etc. Would not match 12/31/2001 or before.

NOTE: the space between the equal sign and the date is optional.

Less Than

"<" Less than matches dates before the criteria date

Examples:

"< 01/01/2002" Finds anything before 1/1/2002. Would match 1/1/1980, 12/31/2001, etc. Would not match 1/1/2002 or after.

NOTE: the space between the less than sign and the date is optional.

"<=" Less than or equal to matches dates on or before the criteria date

Examples:

"<= 01/01/2002" Finds anything on or before 1/1/2002. Would match 1/1/2002, 1/1/1980, 4/1/2001, etc. Would not match 1/2/2002 or after.

NOTE: the space between the equal sign and the date is optional.

Hyphen

"-" Hyphen allows date range searches. These searches are inclusive.

Examples:

"1/1/2001-4/1/2001" Finds anything on or after 1/1/2001 and on or before 4/1/2001. i.e., 1/1/2001, 2/5/2001, 4/1/2001. Would not match 12/31/2000 or 4/2/2001

Numeric Field Searches (Including Money):

"Is Null" Matches anything without a numeric value.

"Is Not Null" Matches anything with a numeric value (functions the same as an asterisk wildcard "*").

Asterisks

"*" Asterisk searches are not supported for numeric fields. Instead, use ">0" or "Is Not Null" when looking for anything with a numeric value.

Greater Than

">" Greater than matches values more than the criteria amount

Examples:

> 50 Finds anything greater than 50. Would match 50.01, 51, 60, etc. Would not match 49.99, 50 or less.

>49.99 Would match 50, 51, 49.9999 (this usually is not a number seen in Sentinel, however). Would not match 49.99, 35, 49.98.

***NOTE:** the space between the greater than sign and the criteria is optional.*

“>=” *Greater than or equal to matches values equal to or more than the criteria amount.*

Examples:

>= 50 Finds anything equal to or more than 50. Would match 50, 50.00, 51, 60, etc. Would not match 49.99 or before.

NOTE: the space between the equal sign and the criteria is optional.

Less Than

“<” *Less than matches values less than the criteria amount*

Examples:

< 50 Finds anything less than 50. Would match 49.99, 0, 25, -15, etc. Would not match 50, 50.00 or more.

NOTE: the space between the less than sign and the criteria amount is optional.

“<=” Less than or equal to matches numbers equal to or less than the criteria amount.

Examples:

<= 50 Finds less than or equal to 50. Would match 50, 50.00, 35, etc. Would not match 50.01 or more.

NOTE: the space between the equal sign and the number is optional.

Hyphen

“-“ Hyphen allows numeric range searches. These searches are inclusive.

Examples:

50-60 Finds anything equal to or more than 50 and equal to or less than 60. Would match 50, 50.01, 55, 59.99, 60.00, etc. Would not match 49.99, 60.01

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