

Sentinel User's Manual

Version 1.0

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1 Terms of Use

In consideration of your use of the Sentinel System, you agree that:

A) Use of the Sentinel System, database information stored within the Sentinel System, and electronic or paper records generated by the Sentinel System has been authorized and is intended solely for conducting official Valley business.

B) Database information stored within the Sentinel system and electronic or paper records generated by the Sentinel system may not be used for the personal gain of myself, staff members, or other individuals or corporations.

C) No other person or organization is authorized to access the Sentinel System using my account credentials.

2 Introduction

If you have any questions about this manual, please contact Dean Alban, Director of Computer Services, at the Supreme Council at 202-232-3579.

Sentinel is an online software tool designed for use by Valley officers and staff members that makes the Valley's job of managing Membership data easier and more efficient. The software system is made up of [data entry screens](#), [reports](#), and data management tools that unify virtually all Supreme Council and Valley-related data in a managed system.

Sentinel's various functions allow you to:

- ❖ Track name, address, and other personal information for Candidates, Members, and non-Members,
- ❖ Track Member activities and participation in Valley events, including plays, committees, and offices,
- ❖ Track dues and contributions, and produce reports using that information.

Your Valley's data resides on secure servers at the office of the Supreme Council, and is integrated with the main database used at the Supreme Council (Patriot). [Data changes](#) in the Supreme Council's Patriot database are reflected in the Sentinel system. For example, address changes made by the Supreme Council cascade immediately into Sentinel. Conversely, when you enter data changes into Sentinel, such as address changes, this information automatically is queued into the Supreme Council's database for review and acceptance by the Supreme Council staff without the need for re-entry. Although Sentinel will not replace all of the paperwork that you are required to submit to the Supreme Council, it will eliminate much of the duplicate data entry that occurs.

2.1 What Is a Relational Database?

Sentinel is a relational database system with a graphical user interface (GUI). A relational database is:

- ❖ A collection of various kinds of information from a variety of sources, stored in such a way that relationships can be defined between individual data items and groups of data items,
- ❖ A tool that organizes and coordinates the information in such a way that it can be retrieved and worked on easily,
- ❖ A way to quickly and efficiently analyze data, create reports, and ask and answer specific questions.

Relational databases also provide the following functions:

- ❖ Information storage,
- ❖ Information indexing,

- ❖ Format conversion,
- ❖ Information transfer.

2.2 What Is a Graphical User Interface?

A graphical user interface allows people to interact with computers in a visual way. You use the mouse and keyboard to enter and process information presented in a way that “makes sense” to humans, while the PC receives the information in a way that “makes sense” to computers.

2.3 How to Use this Manual

2.3.1 Document Hyperlinks

Throughout this manual, there are hyperlinks (also called links), which are words or phrases in an [underlined blue font](#). If you are using an electronic version of the manual, you can click on a hyperlink to take you directly to another part of the document.

2.3.2 Common Sentinel Features

The [Common Sentinel Features](#) section discusses the fields, buttons, links, and other items you see on screens throughout Sentinel. These features function alike everywhere they appear in the application.

2.3.3 Common Sentinel Errors and Error Messages

This is a [troubleshooting guide](#) that explains how Sentinel indicates that an error has occurred, and how to solve the problem that created the error. If the troubleshooting guide does not provide sufficient assistance, then your Valley Administrator may be able to assist you. Technical support for Sentinel is also available

2.3.4 Quick Reference Guides

[Quick reference guides](#) are step-by-step instructions for performing common tasks. Follow the steps in the order listed to complete the task.

2.3.5 Keyboard Shortcuts

[Keyboard shortcuts](#) are combinations of keystrokes that allow you to perform actions without using the mouse. Simply press all the listed keys simultaneously to perform the action. For example, **Ctrl + S** means that you should press the **Ctrl** key and the **S** key simultaneously.

3 System Requirements

- ❖ Windows-based PC (Windows 98 or above)
- ❖ Client PCs accessing Sentinel are required to use Internet Explorer (IE), version 5.5 or above
 - ❖ Security Policy must be [set at a minimum of Medium](#) in Internet Explorer
 - ❖ [Cookies must be enabled](#) in Internet Explorer.
 - ❖ If cookies are not enabled in Internet Explorer, you will see the following error message on the Sentinel Login Screen, as shown in Figure 1 below. (Cookies are small text files stored on the PC. The file stores information such as site preferences and personally identifiable information.)

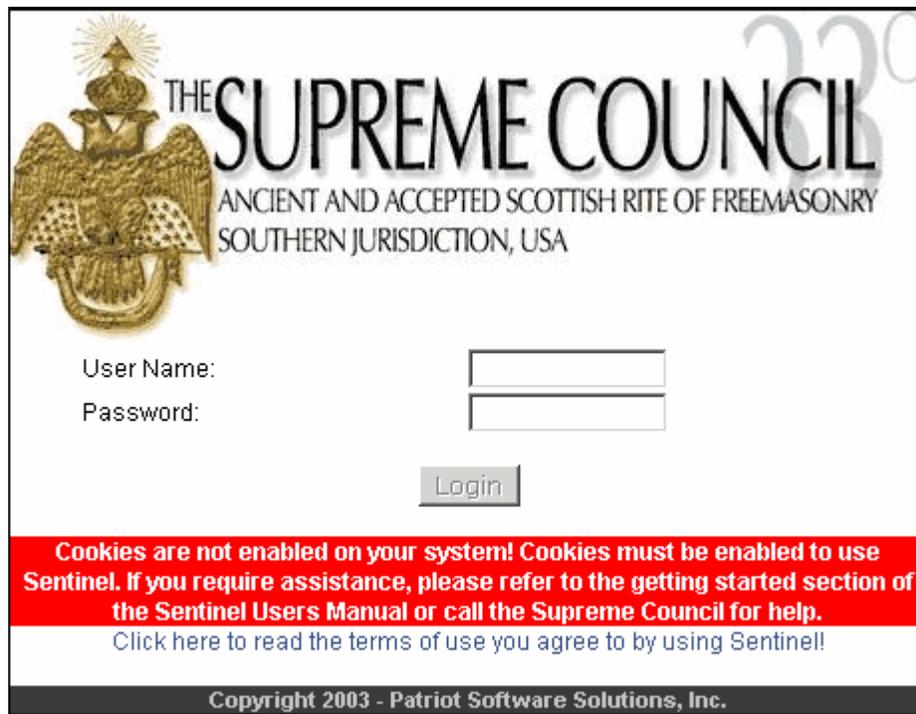


Figure 1: Sentinel Login Screen with Cookies Not Enabled Message

- ❖ Privacy setting must be [set at a minimum of Medium High](#) in Internet Explorer
- ❖ [Temporary Files](#) must refresh each time the screen is visited
- ❖ An Internet connection using a 56KB or faster modem
- ❖ Adobe Reader 5.0 or higher is required for certain reports and downloads. Adobe Reader may be downloaded for free at the following website: (<http://www.adobe.com/products/acrobat/readstep2.html>). Please note that using older versions of Adobe Reader or Adobe Acrobat may produce unpredictable results.

- ❖ Microsoft Word, Microsoft Access, and Microsoft Excel are required for certain data extracts, reports, and downloads

There are a few additional things you can do to keep Sentinel (and other programs) running at maximum efficiency.

- ❖ Enter data consistently—pay attention to capitalization, abbreviations, and hyphens
- ❖ Make sure that your PC has enough system memory (RAM) to run effectively
- ❖ Use the System Tools (Start > Programs > Accessories > System Tools) to clean up the hard drive, scan the hard disk, and defragment the hard drive regularly



Figure 2: Start > Programs > System Tools > Defragment

4 Getting Started

4.1 Accessing Sentinel

In order to access Sentinel, you must first open Internet Explorer (IE). Double-click on the **IE icon** on your desktop to begin.



Figure 3: Internet Explorer Icon

Next, enter the Sentinel application's address, **<http://sentinel.scot-rite.org>**, in the address bar.

4.2 Logging In

You need a username and password in order to log in to Sentinel. Ask your System Administrator for this information.

After you have opened the Sentinel website, the Login screen, shown in Figure 4 appears. The password field on the login screen is case-sensitive. For example, if your password is "Apples1", then Sentinel does not accept "apples1."

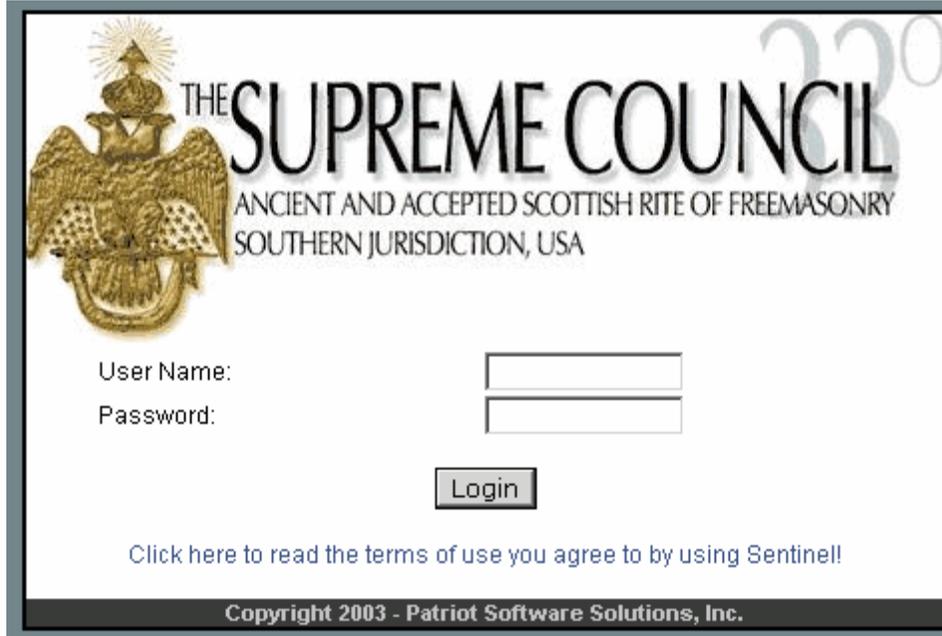


Figure 4: Sentinel Login Screen

Enter your username and password, then click the **Login** button.

Table 1: Sentinel Login Screen Fields & Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Username	Required	Enter your unique user ID. This field is case-sensitive.
Password	Required Field	Enter your password. . This field is case-sensitive, and accepts letters, numbers, and special characters (*, \$, %, etc.). Passwords must be at least five characters long and contain both letters and numbers.
Login Button	Action Button	Click on the button after you have entered your username and password.

Field/Button Name	Field/Button Information	Field/Button Description
Terms of Use	Hyperlink	Click on the hyperlink to review Sentinel's Terms of Use .

If your username and/or password is incorrect, you will see the error message shown in Figure 5 below:

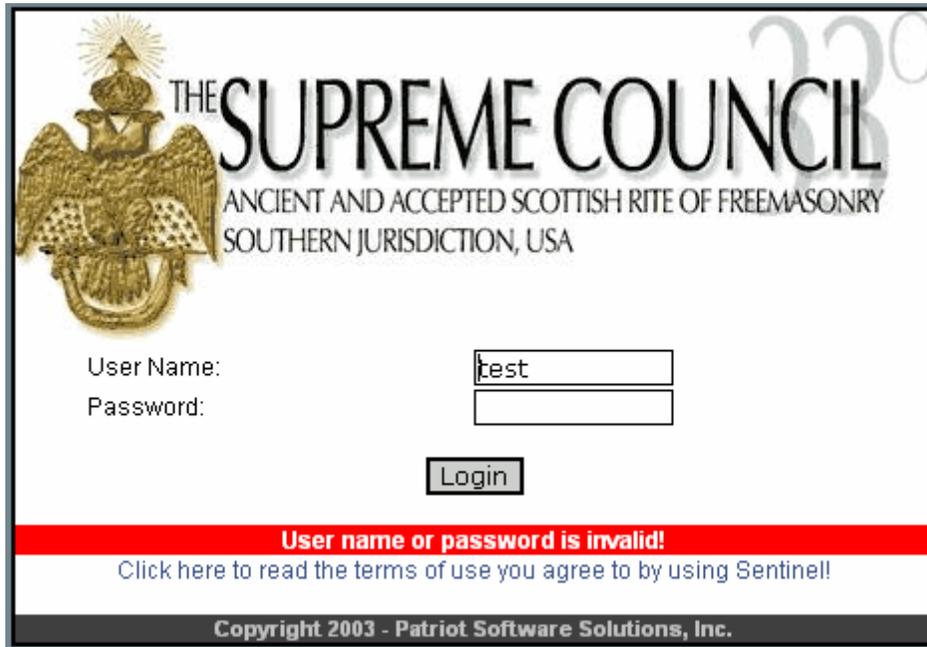


Figure 5: Failed Login Error Message

After you have logged in successfully, the Welcome screen (see Figure 6) appears.

Member Quick Lookup

Member Last Name: Member ID:

Sentinel Notifications

Date	Type	From	Description	Delete?
12/12/2003	Member Address Update	lindah	The address for Dean R Alban was updated by lindah on 12/12/03.	<input type="checkbox"/>
12/11/2003	Member Address Update	helter	The address for not found was updated by helter on 12/11/03.	<input type="checkbox"/>
12/11/2003	Member Address Update	skelter	The address for Dean R Alban was updated by skelter on 12/11/03.	<input type="checkbox"/>
12/11/2003	Member Address Update	skelter	The address for Dean R Alban was updated by skelter on 12/11/03.	<input type="checkbox"/>
12/11/2003	Member Affiliation Update	tfannin	Valley affiliation information for not found was updated by tfannin on 12/11/03.	<input type="checkbox"/>
12/11/2003	Member Affiliation Update	tfannin	Valley affiliation information for Dean R Alban was updated by tfannin on 12/11/03.	<input type="checkbox"/>
<input type="button" value="Delete All Checked Items"/>				

Figure 6: Sentinel Welcome Screen

Recent [notifications](#) from the Patriot system are listed, and the menu bar displays available options.

Table 2: Sentinel Welcome Screen Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Member Last Name	Search Criterion	Use this field to search for a person by last name
Member ID	Search Criterion	Use this field to search for a person by Member number
Find Button	Action Button	Click this button to initiate a search
Delete Checkbox	Indicator	Click in this check box so that a checkmark appears to indicate that you wish to delete the message.
Delete All Checked Items Button	Action Button	Click this button to delete selected messages.

4.3 Logging Out of Sentinel

When you have finished, please remember to log out of Sentinel by clicking the **Logout** menu option (Figure 7) in the upper right corner of any screen.



Figure 7: Logout Menu Option

The logout screen, shown in Figure 8 below, has a link to the [login screen](#).

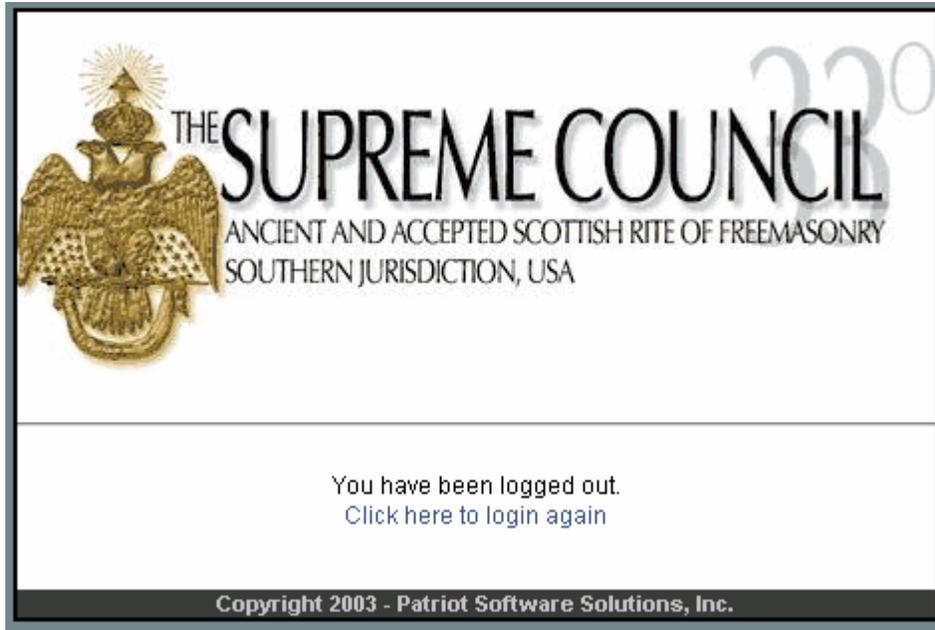


Figure 8: Sentinel Logout Screen

NOTE: Sentinel automatically logs you out after 45 minutes of inactivity.

Table 3: Sentinel Logout Screen Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Click Here to Login Again	Hyperlink	Click on the link to return to the Sentinel Login screen

4.4 Creating a Shortcut to Sentinel

You can create a shortcut to Sentinel in two different ways; you can use the **Favorites** function in Internet Explorer, or you can create a desktop shortcut.

4.4.1 Adding a Link in Favorites

To add the Sentinel web address to the Internet Explorer **Favorites** menu, navigate to the login screen [as described above](#). Then, go to the **Favorites** menu and select **Add to Favorites...**

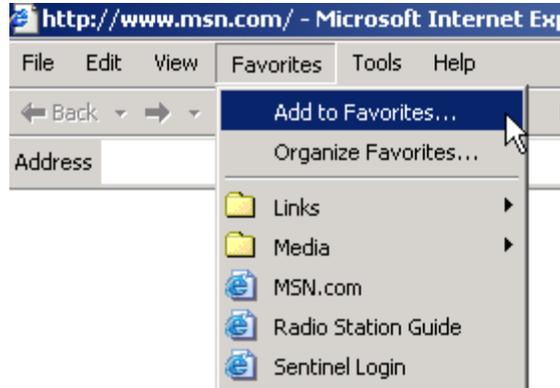


Figure 9: Add to Favorites

Next, name the link by typing into the **Name** area. Click **OK** to complete the process.

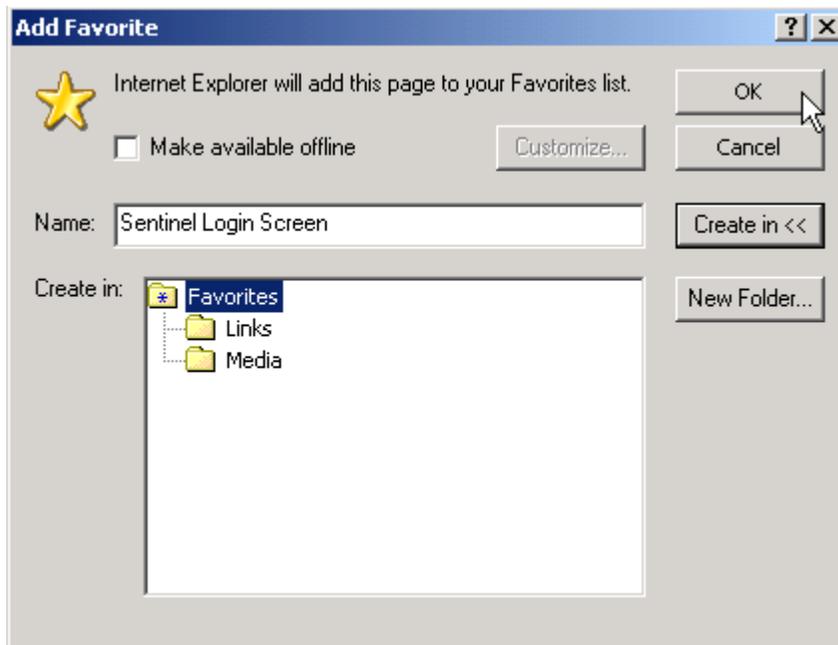


Figure 10: Naming & Saving a Link

Now, when you pull down the **Favorites** menu in Internet Explorer, you can see the link in the list.

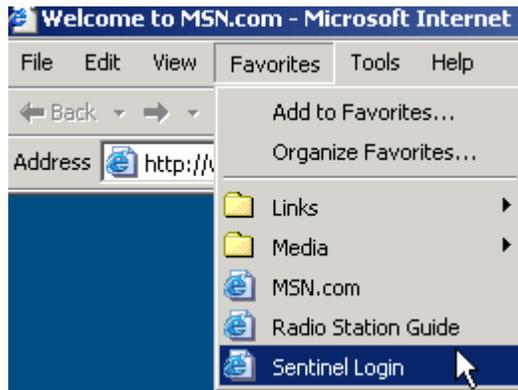


Figure 11: Sentinel Link Displays in Favorites Menu

4.4.2 Creating a Desktop Shortcut

To create a desktop shortcut, open IE and navigate to the Sentinel Login Screen [as described above](#). Then, right-click once anywhere in the Internet Explorer window. Select **Create Shortcut**.

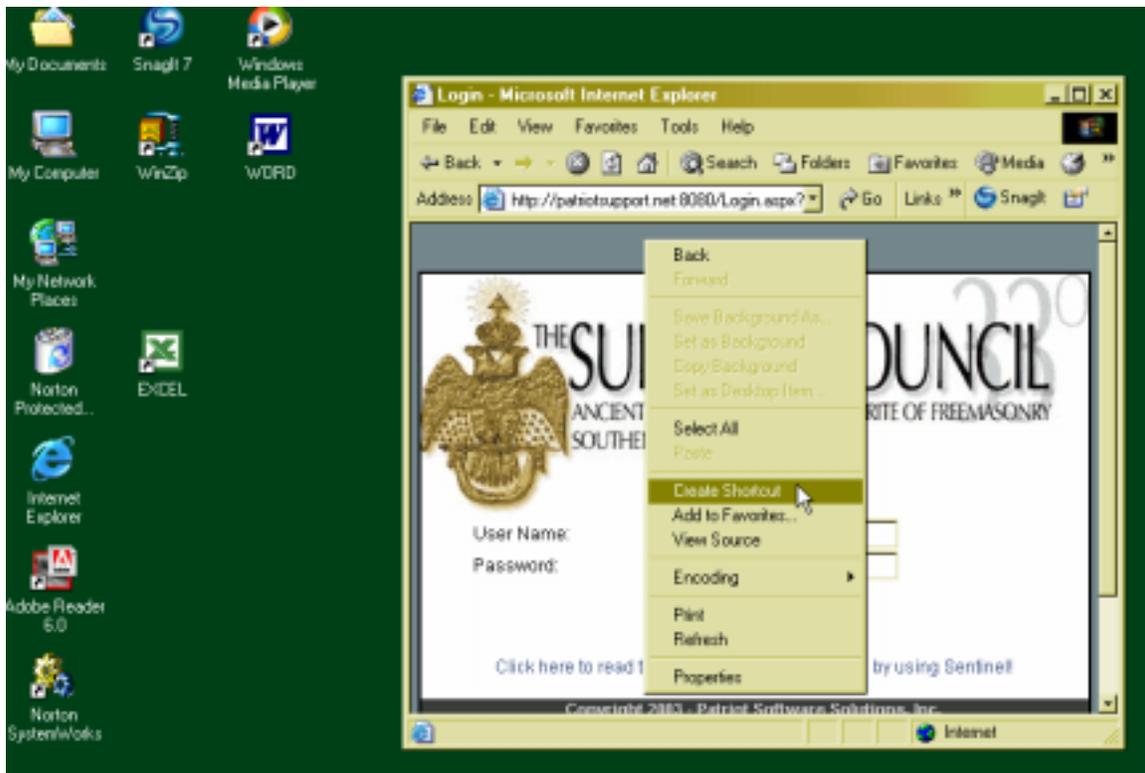


Figure 12: Create a Shortcut

An icon labeled "Login" appears on the desktop.



Figure 13: Login Icon

4.4.3 Renaming the Shortcut

You can rename the shortcut by clicking the right mouse button over it, and selecting **Rename** from the menu.

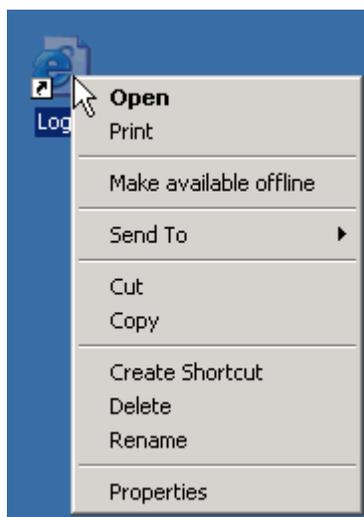


Figure 14: Right-click Menu

Type the new name for the shortcut into the text box, and press the **Enter** key when done.



Figure 15: Renamed Shortcut Icon

Double click on the new shortcut icon to access [Sentinel's login screen](#).

4.5 Internet Explorer Settings

This section leads you through all the required Internet Explorer setup for Sentinel. You can access each item individually by opening the **Internet Options** dialog box.

4.5.1 Setting the Security Policy

Open Internet Explorer. In the **Tools** menu, select **Internet Options**.

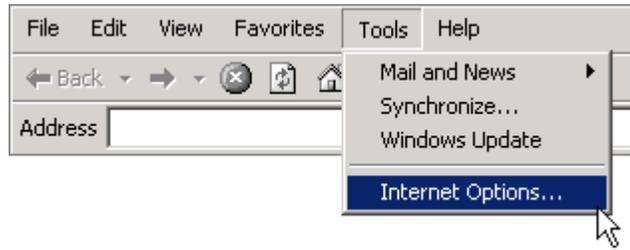


Figure 16: Tools > Options

The Internet Options dialog box opens.



Figure 17: Internet Options Dialog Box

Select the **Security** tab from the Internet Options dialog box

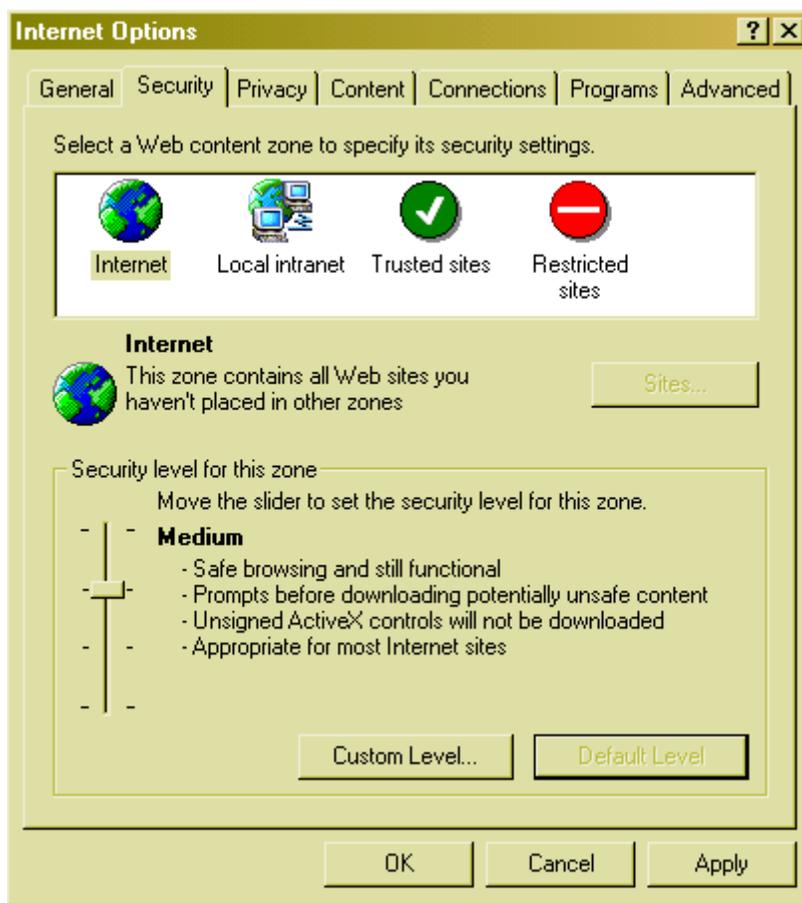


Figure 18: Internet Options - Security

If the dialog box on the screen does not resemble Figure 18 above, click on the **Default Level** button.

Move the slider until the level is **Medium**. Click **Apply** to change the setting.

4.5.2 Adjusting the Privacy Setting

Select the **Privacy** tab in the **Internet Options** dialog box.

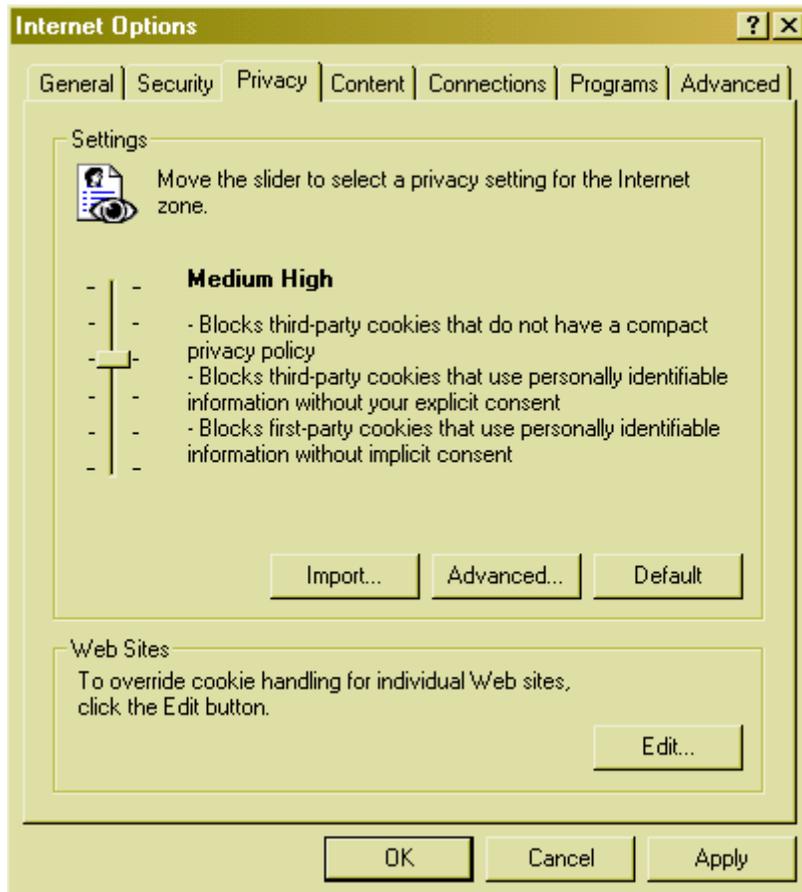


Figure 19: Internet Options - Privacy

Move the slider until the level is **Medium High**. Note that this setting also enables cookies, as required by Sentinel. Click **Apply** to change the settings.

4.5.3 Choosing Temporary Internet File Settings

Select the **General** tab in the **Internet Options** dialog box, if it is not already selected, as in Figure 20 below.

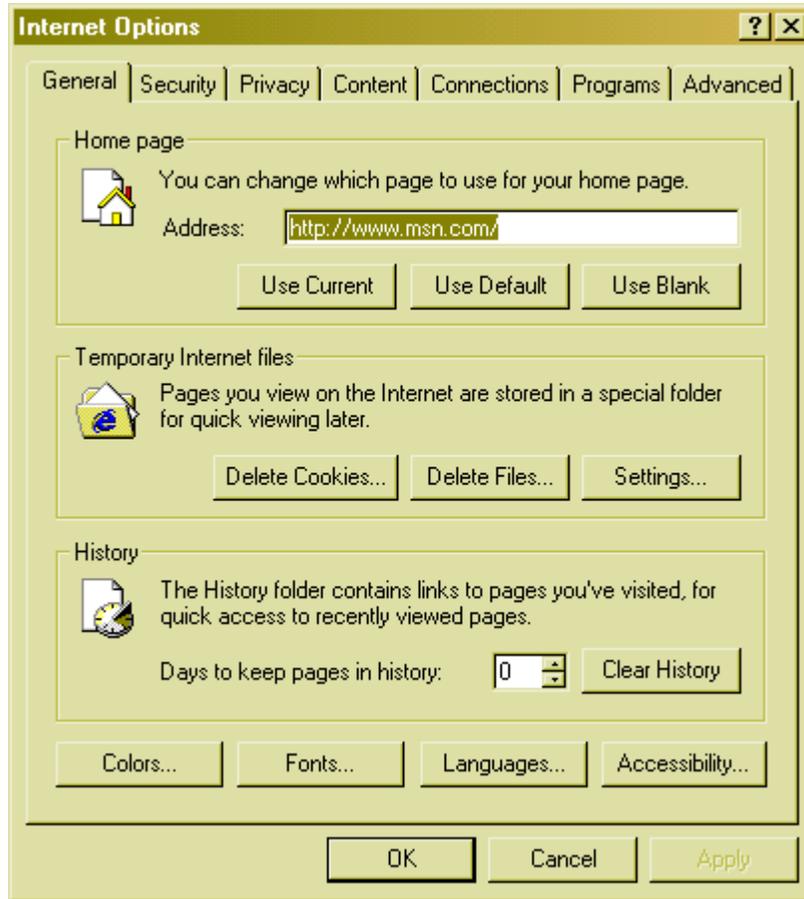


Figure 20: Internet Options Dialog Box

Click on the **Settings** button. The Settings dialog box opens.

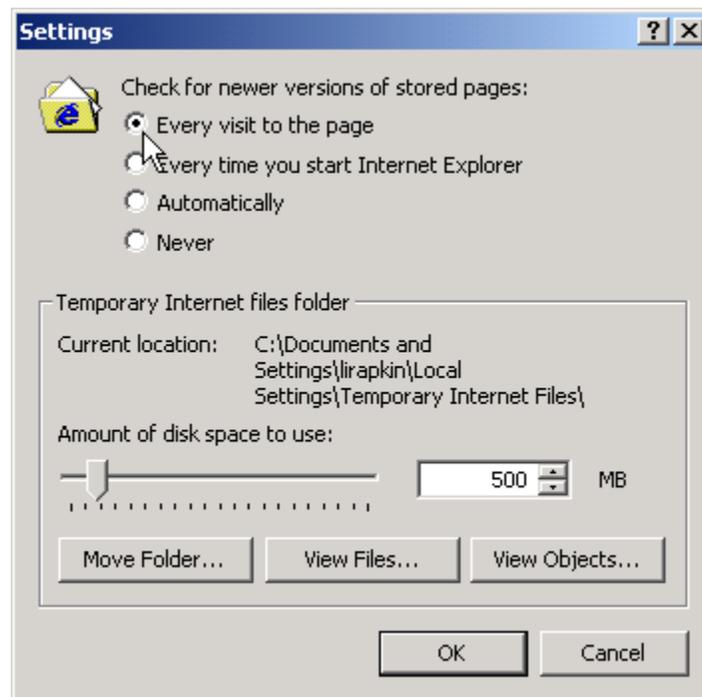


Figure 21: Settings Dialog Box

In the **Check for newer versions of stored pages** section (at the top of the dialog box), make sure that **Every visit to page** is selected. Click **OK**, and the Settings dialog box closes. Click **OK** again to close the Internet Options dialog box.

NOTE: You must make sure that the pages refresh each time you visit them, or the changes you have made recently may not be visible.

5 Sentinel Technical Support

When you encounter a technical issue or error that is not covered in the [Common Sentinel Errors and Error Messages](#) troubleshooting guide, your first resource is your Valley Administrator.

If your Valley Administrator is unavailable or unable to resolve the issue, then call Sentinel Technical Support at the Supreme Council, at (202) 232-3579.

If the Sentinel Technical Support is unable to resolve the issue, then your call will be forwarded to Tier II Technical Support.

6 Security

As a Sentinel user, your account's security settings dictate which areas of the system are available to you. These settings, established by your Valley's Sentinel Administrator, are based on a user role. The roles described in [User Accounts](#) have been established for Valley Administrators to assign to their staff when setting up Sentinel accounts.

NOTE: if you are the Valley's designated Administrator, the Supreme Council creates your account.

6.1 User Accounts

Only one Valley can be assigned to one user account at a time. However, the Supreme Council can reassign a Valley user's account to another Valley when necessary.

The various roles of a user of a Valley are:

6.1.1 Valley Administrator

A Valley Administrator accesses all areas with complete edit capability. Furthermore, the Valley Administrator has authority and complete control to [maintain accounts for other users](#) within the Valley, with the exception of the Valley Administrator account itself, which remains under the administration of the Supreme Council. This account can be assigned only by the Supreme Council. There is only one Valley Administrator account per Valley. See [Section 15: Administrative Users](#) for more information about Valley Administrator tools.

The administration of Sentinel, from the standpoint of the Supreme Council, includes the ability to:

- ❖ Override and reset a Valley user's password,
- ❖ Lock out a Valley user (deactivate an account)
- ❖ Delete a Valley user's account,
- ❖ Change a user's associated Valley.

The Supreme Council has control over all Valley accounts created, not just the Valley Administrator.

6.1.2 Valley User

A Valley User accesses all areas with complete edit capability.

6.1.3 Valley Read-Only User

A Valley Read-Only User accesses all areas in read-only mode.

NOTE: A special administrative account allows an administrative-level user to [select](#), at time of login, which Valley to modify. This type of account is reserved for use by Supreme Council staff Members only.

6.2 Passwords

All passwords in Sentinel must be at least five (5) characters long, and must contain some combination of letters and numbers. Special characters (*, %, \$, etc.) may be used in the password. Passwords do not expire, but may be reset by the [Valley Administrator](#).

7 Forms

Some paper forms have been superseded by Sentinel functionality. Table 4 below summarizes these changes.

Table 4: Forms Superseded by Sentinel Functionality

Form Name/Number	Replacement Sentinel Function
Demit Form	Request Statistical Change
Statement of Fees (Form 330)	Generate a Form 330 menu option
Change of Address/Status (Form 660)	Address Change: People Maintenance Status Change: Request Statistical Change
Non-Member change of address/status (Form 770)	People Maintenance

8 Common Sentinel Features

This section discusses the fields, [buttons](#), [links](#), and other items you see on screens throughout Sentinel. These features function alike everywhere they appear in the application.

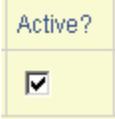
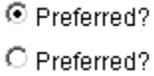
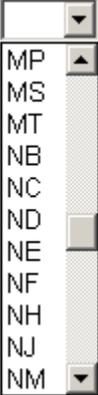
8.1 Field Types

Any place that you enter data is called a “field.” Fields may be optional or [required](#). You must complete all required fields on a screen in order to save your work. Optional fields may be left blank, or filled in later.

Some fields may be display-only, or [grayed out](#). Information in grayed-out fields remains visible, but cannot be modified.

NOTE: Fields with identical labels function identically throughout the Sentinel system. For example, a **Member ID** field is always a **Member ID** field, no matter which screen it appears on.

Table 5: Field Types

Field Type	Description
 <p>Text Box</p>	Type directly into the text box. Text boxes may limit the number of characters allowed. Text boxes may also require that the information be formatted in a certain way. For example, a currency field requires a decimal point and two places to the right.
 <p>Checkbox</p>	Checkboxes are used to answer a yes/no question. Left-click once inside the checkbox to indicate “yes” or “true.” Leave the check box blank to indicate “no” or “false.”
 <p>Radio Button</p>	Radio buttons are used to indicate a single choice among multiple options. Click the mouse inside the radio button next to the option you wish to select.
 <p>Drop-down Box</p>	Drop-down boxes are used to indicate single or multiple choices among multiple options. To indicate a single choice, click on the down arrow to display the choices, then scroll down to the option you wish to select. Click on your chosen option. To select multiple options in a single drop-down box, hold down the Ctrl key and click on each option that you wish to select. (This is very useful when you are searching—for example, you can search a tri-state area by selecting NY, NJ, and CT in the State field.) You can also select a contiguous range of options. Click on the first item in the list. Then, hold down the Shift key and click on the last item in a list.

8.2 Buttons

Table 6: Common Sentinel Buttons

Button	Description
	This button opens the appropriate Lookup dialog box; for example, Lookup a Person . Use this function to fill in text boxes.
	Click this button to add a record to the database. This button usually appears on screens that require data entry.
	Click this button to remove a record from the database. Please note that you cannot undo a record deletion.
	This button appears on screens that allow you to save a set of records as an MS Excel spreadsheet. For more information about this process, see Saving Reports and Data Extracts .
	Click this button to start a search, after you have filled in at least one search criterion.
	Click this button to indicate that you are ready to proceed to the next step in the process
	When you edit a record, the information that you change can affect other data items on the same screen. Clicking refresh allows you to see your changes.
	If reporting is available, based on the type of action you have performed, then you can see the list of available reports by clicking this button.
	Click this button to return to the most recent search results screen.
	Use this button to save a new record or changes to an existing record. (See Note below)
	Click this button to select a specific record and transfer its information to the process you are working on.
	Click this button to delete the information in the field.

NOTE: The **Save** button may have additional descriptive text, such as **Save Payment Information**.

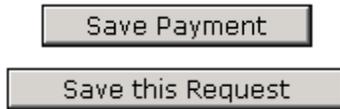


Figure 22: Save Buttons with Messages

8.2.1 Message Buttons

Message buttons have instructions on them that indicate what happens when you click on the button. Examples are shown in Figure 23 below.

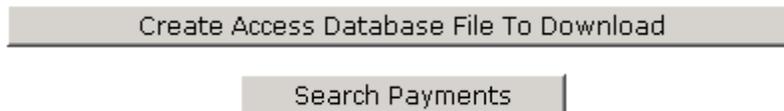


Figure 23: Message Buttons

8.3 Action Links

In some places, you may see a hyperlinked command, such as [\[OK\]](#), [\[Edit\]](#), or [\[Cancel\]](#). These action links have exactly the same functions as buttons with the same label. Usually, these links appear in tables.

To enter a new record, enter the information in the Add section of the table and click the **Add** link when complete.

If you wish to edit a particular record, click on the **Edit** action link in that row. The screen refreshes and you are able to edit the entire record. When you have made your changes, use the **Save** action link to update the record, or the **Cancel** action link to discard the changes.

You may delete the entire record by clicking on the **Delete** action link. In the following cases, you may not be able to delete a record:

- ❖ The record is required by the Sentinel System,
- ❖ There are other records related to the record you wish to delete,
- ❖ The record is controlled by the Supreme Council.

8.4 Click Here to Try Again

If a search does not find any matches, or a process is unsuccessful, Sentinel displays a message with that information. There is also a **Click Here to Try Again** link that takes you back to where you started and resets the screen so that you may try again. Use the **Click Here to Try Again** links in place of the Back button in your browser. Clicking on the link resets the screen, but clicking on the Internet Explorer Back button does not.

No matching people or member records were found based on the search criteria you supplied.

[Click Here to try again](#)

Figure 24: Click Here to Try Again Link

8.5 Screen Navigation

DO NOT use the Stop , Back , or Next  buttons in Internet Explorer. If you get lost in Sentinel, clicking the Refresh  button on the IE toolbar automatically returns you to the [Member Quick Lookup](#) screen.

DO NOT use the Enter key in place of the buttons on the Sentinel screens. The Enter key is disabled in Sentinel, and does not have any effect.

You may move from one field to the next in any Sentinel screen by pressing the **Tab** key. You may move to the previous field by pressing **Shift + Tab**

8.5.1 Sentinel Back and Next Buttons

The Sentinel **Back** and **Next** buttons move you to the previous or next screen in a sequence, respectively. These buttons appear in multi-step processes that involve more than one screen.



Figure 25: Sentinel Back & Next Buttons

8.5.2 Browsing Through Records and Search Results

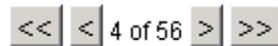


Figure 26: Sentinel Navigation Buttons

A button with a single forward arrow (>) moves you forward one record, i. e., from record #4 to record #5, for example. A button with a double forward arrow (>>) moves you to the last record in the record set. A button with a single backward arrow (<) moves you back one record, from record #5 to record #4, for example. A button with a double backward arrow (<<) moves you to the first record in the record set. The numbers in the middle describe the current record and total number of records.

8.5.3 Page Number Links

If you have more than one page of search results, the search screen allows you to page through your results by clicking on page number links. An ellipsis (...) indicates that there are more pages of records. Click on a page number to view a specific page, or on the ellipsis to get another set of page number links.

A horizontal row of page number links. The numbers 11 through 20 are visible, with ellipses at both ends. The numbers 15, 16, 17, and 18 are highlighted in a light yellow background.

Figure 27: Page Number Links

8.6 On-Screen Messages

When you have performed an action in Sentinel, such as saving data, you might see a message like those shown in Figure 28 appear on the screen after the screen refreshes.

A small rectangular message bar with a green background and a thin black border. The text "Saved!" is written in a bold, black, sans-serif font.

Figure 28: Message Bar Examples – Successful Operation

A small rectangular message bar with a yellow background and a thin black border. The text "No matching members found!" is written in a bold, black, sans-serif font.

Figure 29: Message Bar Examples – Incomplete/Unsuccessful Operation

When the message bar has a green background, the operation has been successful. When the message bar has a yellow or red background, the operation is not successful OR not complete. Read the message carefully to determine whether an error has occurred.

8.7 Sorting Data in Tables

Sentinel allows you to sort data in tables by clicking on the hyperlink in the table column heading.

A table with a light yellow background and a thin black border. The table has seven columns with the following headings: "Office", "Name", "Begin Date", "End Date", "In Office?", "Edit", and "Delete".

Figure 30: Table Column Heading Links

The column heading that you choose to use as a sort criterion changes to **bold** when you click on it. The first time that you click on the table column heading, all search results in the table (all pages) sort in alphabetical order (A-Z). The second time that you click on the same table column heading, all the search results in the table (all pages) sort in reverse alphabetical order (Z-A).

8.8 Searches

Any or all of the pieces of information in a record can be used in a search. Simply enter at least one search criterion, and the system provides a list of Members whose information matches the item(s) searched. Sentinel supports searches using greater than, less than, fragment (wildcard) matching, is blank and is not blank. You can employ Boolean search logic--AND or OR--using the **Join Search Elements with** drop-down box in the upper right corner of the screen. This drop-down box defaults to AND.

An example of a wildcard search is shown in Figure 31 below. Note that the asterisk (*) is used to indicate the wildcard. You can place the asterisk before, after, or in the middle of a search criterion. See the [Advanced Search Examples](#) section for more information about searches in Sentinel.

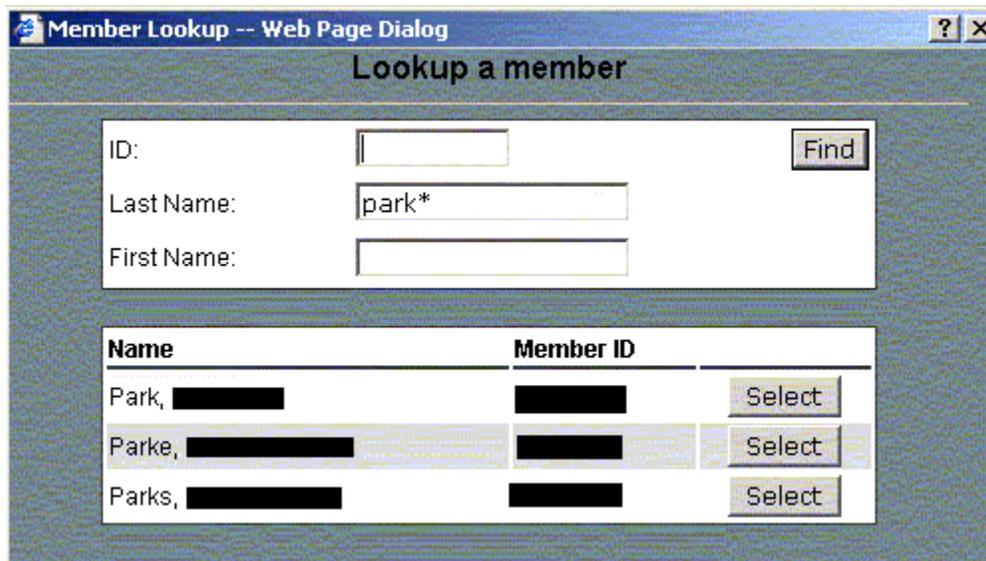


Figure 31: Wild Card Search Results

8.8.1 Search Results

When a search turns up fewer than thirty (30) matches, all of the records are displayed on one search results screen. When a search turns up thirty matches or more, then the records are grouped into pages of ten matches each. Use the [page number links](#) to navigate to other pages.

8.9 **Grayed-Out Fields and Buttons**

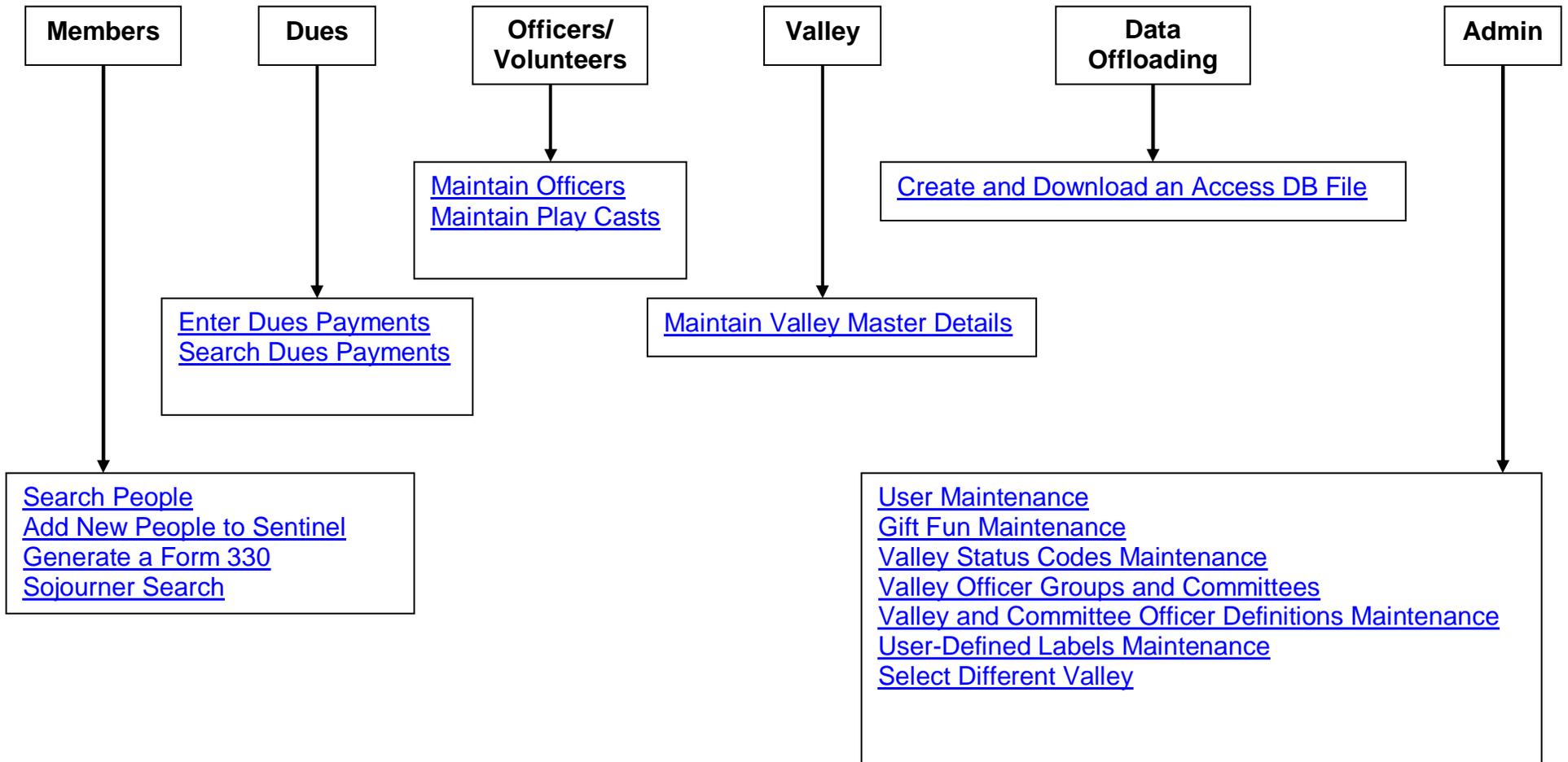
If a field cannot be edited, or a button is inactive, then its appearance changes so that it is “grayed out.”



Figure 32: Grayed-Out Fields and Buttons

Information in grayed-out fields remains visible, but cannot be modified. Buttons that are grayed out cannot be clicked. In some cases, grayed-out buttons may become active after you have made changes to editable fields on the screen, or after a screen refreshes.

9 Sentinel Menu Structure



10 Sentinel Notification System

Valley-level users are notified when changes have been made to records within their Valleys' system. The Sentinel Notification System (SNS) alerts a Valley of data changes that have been applied to its records by the Supreme Council. The Valley user can see whom at the Supreme Council made the change, as well as the date that the change was made. This notification process occurs automatically as Patriot broadcasts [data changes](#) to Sentinel. Messages appear on the [Sentinel Welcome Screen](#).



Figure 33: Sentinel Welcome Screen with Notifications

After you have read the messages, you can delete them on the [Welcome screen](#) in the SNS by clicking the mouse in the **Delete?** check box at the right of the message and clicking on the **Delete All Checked Items** button.

Examples of data changes applied to Sentinel that trigger an SNS message for the Valley are new Member processing, address changes, and Member status changes. Valley users may also use SNS to notify other Valleys and the Supreme Council in an ad hoc fashion. These messages are displayed on the Welcome screen.

All messages in the Sentinel Notification System are read-only.

If a notice arrives while you are working, a flashing red exclamation point appears in the upper left corner of the screen, as shown in Figure 34. If you click on the exclamation point, then the Welcome screen appears with the new SNS message.

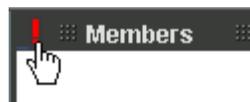


Figure 34: Sentinel New Message Indicator

11 Screens

NOTE: Some Sentinel functions are restricted to [higher-level users](#). You only see menu options that are available to your user account type.

11.1 Members

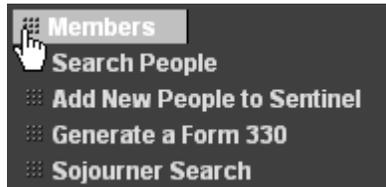


Figure 35: Sentinel Members Menu

11.1.1 Member Quick Lookup



Figure 36: Sentinel Member Quick Lookup Screen

This screen allows you to search for a Member by Last Name and/or Member ID number. It appears after the [Welcome](#) or [Select a Valley](#) screen, and whenever you click the Internet Explorer refresh  button. Please see the [Advanced Search Examples](#) for additional information about searching.

Table 7: Sentinel Member Quick Lookup Screen Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Member Last Name	Search Criterion	Use this field to search for a person by last name
Member ID	Search Criterion	Use this field to search for a person by Member number
Find Button	Action Button	Click this button to initiate a search

11.1.2 Search People

This screen has multiple tabs—[Profile](#), [Other Addresses](#), [Other Member Info](#), Offices/Volunteer/Groups, Donations, and Notes.

Sentinel allows you to search using criteria from any of the [People Maintenance](#) screens. You can combine search criteria from multiple screens (Profiles, Other Addresses, Donations, etc.) by entering the information on each screen and making sure that **AND** is selected in the **Join Search Elements** drop-down box. Please see the [Advanced Search Examples](#) for additional information about searching.

NOTE: The **Member ID** and **Join Search Elements** fields remain unchanged at the top of every screen in the People Search function.

After you have entered all the search criteria, click the **Find** button in the upper right corner of the screen. When the search has completed, Sentinel displays a list of results on the [Browse Search Results](#) screen.

NOTE: You must enter *at least one* search criterion, or the search will not return any records.

The screenshot shows the top navigation bar with tabs: Members, Dues, Officers/Volunteers, Valley, Data Offloading, Admin, and Logout. Below the navigation bar is a header: "Combine Search Criteria From The Below Areas. Click Find After You Have Filled In Your Criteria:". Underneath are five tabs: Profile, Other Addresses, Other Mem Info, Offices, and Donations. At the bottom, there is a "Member ID:" field with an input box, a red arrow pointing to a "Join Search Elements with:" label, a drop-down menu currently showing "AND", and a "Find" button.

Figure 37: Join Search Elements Drop-down Box

For example, you wish search for every person in the database who lives in New Jersey, whose last name starts with R, and is retired. On the **Profile** tab, enter R* in the **Last Name** box, and NJ in the **State** box. The, go to the **Other Member Info** tab, and select Retired in the **Job Status** drop-down box. Select AND in the **Join Search Elements** drop-down box, and click on the **Find** button.

11.1.2.1 Profile Tab

11.1.2.1.1 Simple/Expert Versions

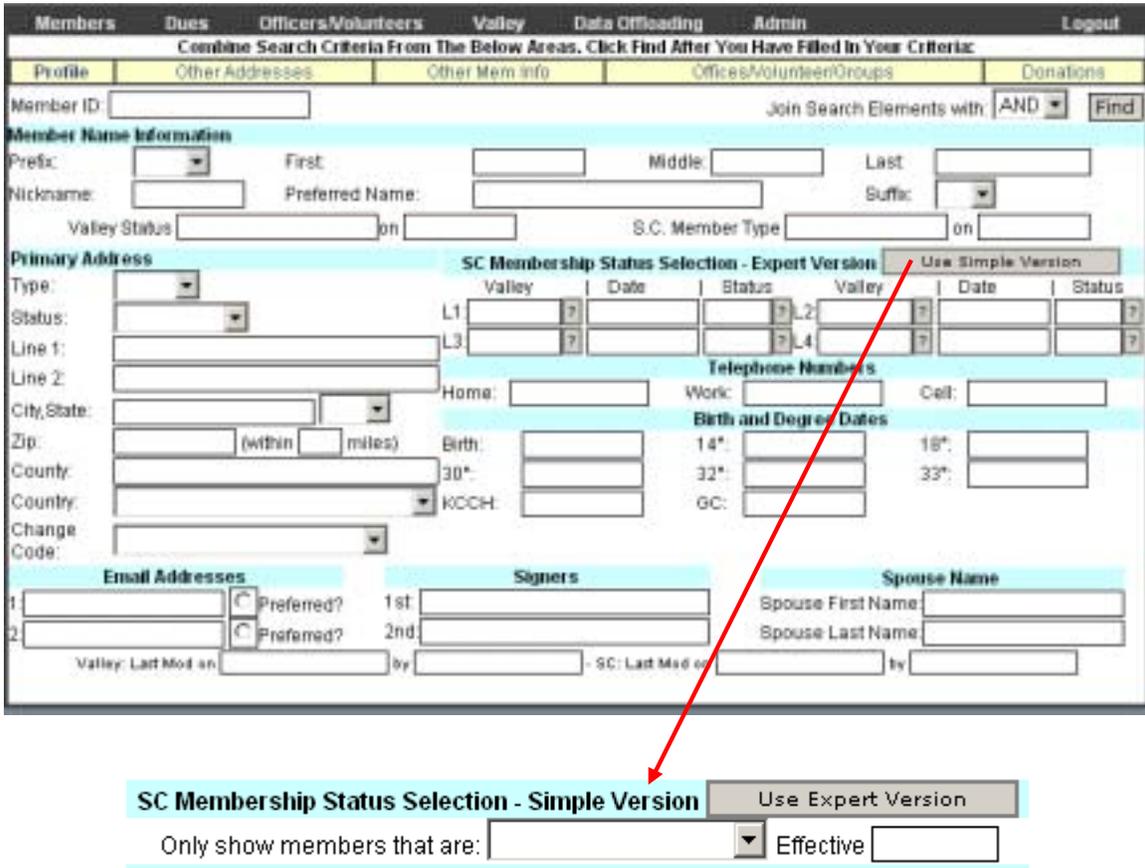


Figure 38: Simple Version

Table 8: Sentinel People Search – Profile: Simple Version Tab Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
SC Mem Valley, Eff Date and Status Code		
Only Show Members That Are	Search Criterion	Select the Member classification from the drop-down box
Since	Search Criterion	Use this field to search by the effective date of the Member classification
Use Expert Version Button	Action Button	Click to change to the Expert version of the Search screen

In the Expert version of the Search People screen, the **SC Membership Status** section changes to **SC Membership Status Selection**, and offers several fields that can be used as search criteria. The rest of the screen remains the same.

Figure 39: Expert Version

Table 9: Sentinel People Search – Profile: Expert Version Tab Fields and Buttons

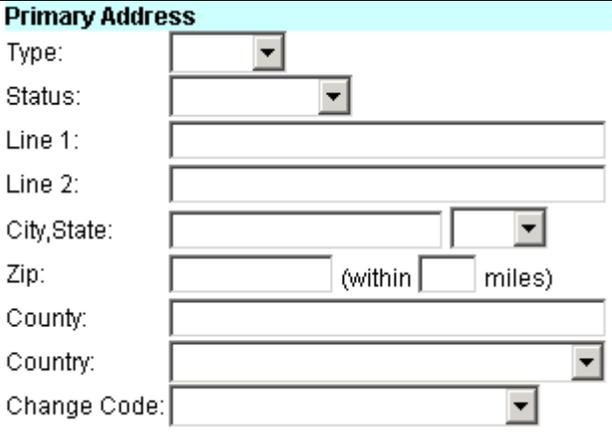
Field/Button Name	Field/Button Information	Field/Button Description
SC Mem Valley, Eff Date and Status Code		
L1-L4 – Valley	Search Criterion	Use the ? button to select a Valley/Orient combination, or type the information into the field
L1-L4 – Date	Search Criterion	Use this field to search by the level effective date
L1-L4 – Status	Search Criterion	Use the ? button to select the level status code, or type the information into the field
Use Simple Version Button	Action Button	Click to change to the Simple version of the Search screen

Table 10: Sentinel People Search – Profile Tab Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Member ID	Search Criterion	Use this field to search for a person by Member number
Join Search Elements With	Search Criterion	Select AND to search by all search criteria. Select OR to search by any search criteria.
Find Button	Action Button	Click this button to initiate a search
Member Name Information		
		
Prefix	Search Criterion	Select a prefix from the drop-down box
First	Search Criterion	Use this field to search for a person by first name
Middle	Search Criterion	Use this field to search for a person by middle name
Last	Search Criterion	Use this field to search for a person by last name
Nickname	Search Criterion	Use this field to search for a person by nickname
Preferred Name	Search Criterion	Use this field to search for a person by preferred name
Suffix	Search Criterion	Select a suffix from the drop-down box
Valley Status	Search Criterion	Use this field to search for a person by the assigned Valley Status code
On	Search Criterion	Use this field to search for a person by the date of the assigned Valley Status code
S. C. Member Type	Search Criterion	Use this field to search for a person by the Supreme Council member type

Field/Button Name	Field/Button Information	Field/Button Description
On	Search Criterion	Use this field to search for a person by the date of the Supreme Council member type

Table 11: Sentinel People Search – Profile Tab Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Primary Address		
		
Type	Search Criterion	Select the type of address from the drop-down box
Status	Search Criterion	Select the address status from the drop-down box
Line 1	Search Criterion	Use this field to search for a person by the first line of the street address
Line 2	Search Criterion	Use this field to search for a person by the second line of the street address
City	Search Criterion	Use this field to search for a person by city
State	Search Criterion	Use this field to search for a person by state
ZIP	Search Criterion	Enter the ZIP code that you wish to search. To search only in a specific ZIP code, leave the text box blank
(Within X miles)	Search Criterion	Enter the radius around the base ZIP code in miles. This field will only accept numbers. Wildcard searches are not available.
County	Search Criterion	Use this field to search for a person by county

Field/Button Name	Field/Button Information	Field/Button Description
Country	Search Criterion	Use this field to search for a person by country
Change Code	Search Criterion	Select the address change notification type/reason from the drop-down box.

Table 12: Sentinel People Search – Profile Tab Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Telephone Numbers		
Telephone Numbers		
Home: <input type="text"/> Work: <input type="text"/> Cell: <input type="text"/>		
Home	Search Criterion	Use this field to search by a home phone number
Work	Search Criterion	Use this field to search by a work phone number
Cell	Search Criterion	Use this field to search by a cell phone number
Birth and Degree Dates		
Birth and Degree Dates		
Birth: <input type="text"/> 14°: <input type="text"/> 18°: <input type="text"/> 30°: <input type="text"/> 32°: <input type="text"/> 33°: <input type="text"/> KCCH: <input type="text"/> GC: <input type="text"/>		
Birth	Search Criterion	Use this field to search by a birth date
14°	Search Criterion	Use this field to search by a fourteenth degree date
18°	Search Criterion	Use this field to search by a eighteenth degree date
30°	Search Criterion	Use this field to search by a thirtieth degree date
32°	Search Criterion	Use this field to search by a thirty-second degree date
KCCH	Search Criterion	Use this field to search by a KCCH date
GC	Search Criterion	Use this field to search by a GC date
33°	Search Criterion	Use this field to search by a thirty-third degree date

Table 13: Sentinel People Search – Profile Tab Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Email Addresses		
<div style="background-color: #e0f7fa; padding: 5px; margin-bottom: 5px;">Email Addresses</div> 1: <input type="text"/> <input type="radio"/> Preferred? 2: <input type="text"/> <input type="radio"/> Preferred?		
1	Search Criterion	Use this field to search by an email address
2	Search Criterion	Use this field to search by an email address
Preferred?	Search Criterion	Click in the radio button to indicate that the email address is the person's primary email address
Signers		
<div style="background-color: #e0f7fa; padding: 5px; margin-bottom: 5px;">Signers</div> 1st: <input type="text"/> 2nd: <input type="text"/>		
1 st	Search Criterion	Use this field to search using the name of the first signer for that person
2 nd	Search Criterion	Use this field to search using the name of the second signer for that person
Spouse Name		
<div style="background-color: #e0f7fa; padding: 5px; margin-bottom: 5px;">Spouse Name</div> Spouse First Name: <input type="text"/> Spouse Last Name: <input type="text"/>		
Spouse First Name	Search Criterion	Use this field to search using the first name of the person's spouse
Spouse Last Name	Search Criterion	Use this field to search using the last name of the person's spouse

Table 14: Sentinel People Search – Profile Tab Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Modifications		
Valley: Last Mod on <input type="text"/> by <input type="text"/> - SC: Last Mod on <input type="text"/> by <input type="text"/>		
Valley: Last Mod By	Search Criterion	Use this field to search using the username of the Valley person who most recently modified the record
Valley: Last Mod On	Search Criterion	Use this field to search using the date of the most recent modification of the field by a Valley user
SC: Last Mod By	Search Criterion	Use this field to search using the username of the Supreme Council person who most recently modified the record
SC: Last Mod On	Search Criterion	Use this field to search using the date of the most recent modification of the field by a Supreme Council user

11.1.2.2 Other Addresses Tab

Figure 40: Sentinel Search People – Other Addresses Screen

This screen is used to search using alternate addresses. The address fields function exactly the same in both alternate addresses.

Table 15: Sentinel People Search – Other Addresses Tab Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Member ID	Search Criterion	Use this field to search for a person by Member number
Return Button	Action Button	Click this button to return to the most recent search results screen.
Save Button	Action Button	Use this button to save a new record or changes to an existing record.
Member ID	Search Criterion	Use this field to search for a person by Member number
Type	Search Criterion	Select the type of address from the drop-down box
Status	Search Criterion	Select the address status from the drop-down box

Field/Button Name	Field/Button Information	Field/Button Description
Line 1	Search Criterion	Use this field to search for a person by the first line of the street address
Line 2	Search Criterion	Use this field to search for a person by the second line of the street address
City	Search Criterion	Use this field to search for a person by city
State	Search Criterion	Use this field to search for a person by state
ZIP	Search Criterion	Use this field to search for a person by ZIP Code
County	Search Criterion	Use this field to search for a person by county
Country	Search Criterion	Use this field to search for a person by country
Change Code	Search Criterion	Select the address change notification type/reason from the drop-down box.

11.1.2.3 Other Member Info Tab

Members Dues Officers/Volunteers Valley Data Offloading Admin Logout

Profile Other Addresses **Other Mem Info** Offices/Volunteer Groups Donations Text Notes

Member ID: 10363852 **H. G. Wells** Return << < 3 of 10 > >> Save

Job Information

Employer: Job Title: Author

Job Status: Job Code: Creative Arts

User Defined Fields (Valley administrators: Set field descriptions under "Admin")

Favorite Color Inseam

License Plate Sample Label 4

Sample Label 5 Sample Label 6

Sample Label 7 Sample Label 8

Sample Label 9 Sample Label 10

Member Dues Summary

Current Dues Year:

Current Statement Code:

Current Status Code:

Current Year Total Paid:

Current Year Due Balance:

Past Due Balance:

Total Balance Due:

Blue Lodge Information

Lodge Name:

Lodge Number:

Lodge City:

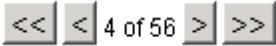
Lodge State:

Show Yearly Dues Details

Figure 41: Sentinel Search People – Other Member Info Screen

This screen is used to search using job information, user-defined fields, dues information, and Blue Lodge information.

Table 16: Sentinel People Search – Other Member Info Tab Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description						
Member ID	Search Criterion	Use this field to search for a person by Member number						
Return Button	Action Button	Click this button to return to the most recent search results screen.						
	Action Buttons	A button with a single forward arrow (>) moves you forward one record. A button with a double forward arrow (>>) moves you to the last record in the record set. A button with a single backward arrow (<) moves you back one record. A button with a double backward arrow (<<) moves you to the first record in the record set. The numbers in the middle describe the current record and total number of records.						
Save Button	Action Button	Use this button to save a new record or changes to an existing record.						
Job Information								
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2" style="background-color: #e0f7fa;">Job Information</td> </tr> <tr> <td>Employer: <input style="width: 150px;" type="text"/></td> <td>Job Title: <input style="width: 150px;" type="text"/></td> </tr> <tr> <td>Job Status: <input style="width: 60px;" type="text" value="Current"/></td> <td>Job Code: <input style="width: 150px;" type="text"/></td> </tr> </table>			Job Information		Employer: <input style="width: 150px;" type="text"/>	Job Title: <input style="width: 150px;" type="text"/>	Job Status: <input style="width: 60px;" type="text" value="Current"/>	Job Code: <input style="width: 150px;" type="text"/>
Job Information								
Employer: <input style="width: 150px;" type="text"/>	Job Title: <input style="width: 150px;" type="text"/>							
Job Status: <input style="width: 60px;" type="text" value="Current"/>	Job Code: <input style="width: 150px;" type="text"/>							
Employer	Search Criterion	Use this field to search for a person by current employer						
Job Status	Search Criterion	Select the job status from the drop-down box						
Job Title	Search Criterion	Use this field to search for a person by job title						
Job Code	Search Criterion	Select the job code from the drop-down box						
User Defined Fields								

Field/Button Name	Field/Button Information	Field/Button Description
User Defined Fields		
User Field 1:	<input type="text"/>	User Field 2:
User Field 3:	<input type="text"/>	User Field 4:
User Field 5:	<input type="text"/>	User Field 6:
User Field 7:	<input type="text"/>	User Field 8:
User Field 9:	<input type="text"/>	User Field 10:
[Field Name]	Search Criterion	Use this field to search for a person by the user-defined field data item

Table 17: Sentinel People Search – Other Member Info Tab Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Member Dues Summary		
<p>Member Dues Summary</p> <p>Current Dues Year: <input type="text"/></p> <p>Current Statement Code: <input type="text"/></p> <p>Current Status Code: <input type="text"/></p> <p>Current Year Total Paid: <input type="text"/></p> <p>Current Year Due Balance: <input type="text"/></p> <p>Past Due Balance: <input type="text"/></p> <p>Total Balance Due: <input type="text"/></p>		
Current Dues Year	Search Criterion	Use this field to search for a person by the current four-digit dues year
Current Statement Code	Search Criterion	Use this field to search for a person by the current statement code
Current Status Code	Search Criterion	Use this field to search for a person by the current dues status code
Current Year Total Paid	Search Criterion	Use this field to search for a person by the current amount of money paid for the year
Current Year Due Balance	Search Criterion	Use this field to search for a person by the current amount of money owed for the year
Past Due Balance	Search Criterion	Use this field to search for a person by the current amount of the past due balance
Total Balance Due	Search Criterion	Use this field to search for a person by the current amount of the total balance owed

Table 18: Sentinel People Search – Other Member Info Tab Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Blue Lodge Information		
<div style="background-color: #e0ffff; padding: 5px;">Blue Lodge Information</div> Lodge Name: <input type="text"/> Lodge Number: <input type="text"/> Lodge City: <input type="text"/> Lodge State: <input type="text"/>		
Lodge Name	Search Criterion	Use this field to search for a person by Blue Lodge name
Lodge Number	Search Criterion	Use this field to search for a person by Blue Lodge number
Lodge City	Search Criterion	Use this field to search for a person by Blue Lodge city
Lodge State	Search Criterion	Select the Blue Lodge state from the drop-down box

11.1.3 Browse People Search Results

The Browse People Search Results screen appears when Sentinel completes a [people search](#).

56 Members Found

Member ID	Name	Preferred Address
55 [REDACTED]	Smith, [REDACTED]	Baltimore, MD 21222-3952
99 [REDACTED]	Smith, [REDACTED]	Downingtown, PA 19335-1190
97 [REDACTED]	Smith, [REDACTED]	Taneytown, MD 21787-2513
97 [REDACTED]	Smith, [REDACTED]	Chesapeake Bch, MD 20732-3633
86 [REDACTED]	Smith, [REDACTED]	Sykesville, MD 21794-5208
73 [REDACTED]	Smith, [REDACTED]	Arnold, MD 21012-2049
90 [REDACTED]	Smith, [REDACTED]	Forest Hill, MD 21050-2804
10 [REDACTED]	Smith, [REDACTED]	Baltimore, MD 21234
55 [REDACTED]	Smith, [REDACTED]	Baltimore, MD 21236-1040
55 [REDACTED]	Smith, [REDACTED]	Severna Park, MD 21146-2156

1 2 3 4 5 6

Figure 42: Sentinel Browse Member Search Results Screen

Search results are displayed ten at a time. You can page through the results by clicking on any of the [page number hyperlinks](#) at the bottom center of the screen. Each Member ID, Name, and Preferred Address is a link to the [Profile](#).

Table 19: Sentinel Browse People Search Results Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Member ID Link	Hyperlink	Click on the link to view the related record
Name Link	Hyperlink	Click on the link to view the related record
Address Link	Hyperlink	Click on the link to view the related record
New Search Button	Action Button	Click on the button to discard the current search results and begin a new search
Export to Excel Button	Action Button	This button appears on screens that allow you to save a set of records as an Excel spreadsheet. For more information about this process, see Saving Reports and Data Extracts .

Field/Button Name	Field/Button Information	Field/Button Description
Reports Button	Action Button	Click this button to see the list of available reports.

The following reports are available from the Browse People Search Results screen:

- ❖ [Blue Lodge Information Report](#)
- ❖ [Degree Date Listing](#)
- ❖ [Member Directory Listing](#)
- ❖ [Member Dues Information](#)
- ❖ [People Labels](#)

11.1.4 Add New People to Sentinel

This screen closely resembles the [Profile](#) screen. The major difference is that this screen is used to add new information to the Sentinel database, while the Profile and other People Maintenance screens edit information that already exists. The information that you enter feeds into many other functions in Sentinel, including searches, reports, data extracts, and other Sentinel functions. For this reason, you should enter as much information as possible when you create a new record. However, you can always go back and edit the record, or add information to it, using the [People Maintenance](#) functions.

NOTE: DO NOT create a new record every time you wish to add or edit information to a person's record. Use the [Search People](#) screen to locate the appropriate existing record, then use the Profile and other People Maintenance screens to edit the existing record. **It is extremely important to avoid creating duplicate records.** If you think you have created a duplicate record, notify your Valley Administrator and call Sentinel Technical Support at the Supreme Council, at (202) 232-3579.

Figure 43: Sentinel Add New People to Sentinel Screen

This screen can be used to add any kind of People record to the Valley's Sentinel database—Members, Candidates, vendors, members' spouses, and other non-members.

After you have entered all the information that you wish to include, click the **Save** button to add the new record to the database.

Table 20: Add New People to Sentinel Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Member Name Information		
		
Prefix	Optional Field	Select a prefix from the drop-down box
First	Required Field	Enter the person's first name
Middle	Optional Field	Enter the person's middle name
Last	Required Field	Enter the person's last name
Nickname	Optional Field	Enter the person's nickname
Preferred Name	Required Field	The Preferred Name is the name that appears in large letters at the top of the People Maintenance screens.
Suffix	Optional Field	Select a suffix from the drop-down box
Valley Status	Optional Field	This field defaults to Candidate, but you may change the Valley Status code using the drop-down box. Options in the Valley Status drop-down box can be edited using the Valley Status Code Maintenance screen.
On	Optional Field	Record the effective date of the current Valley Status code
Birth Date	Optional Field	Enter the person's birth date
Save Button	Action Button	Use this button to save a new record or changes to an existing record.

Table 21: Add New People to Sentinel Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Primary Address		
<div style="background-color: #e0ffff; padding: 5px;"> <p>Primary Address</p> <p>Type: <input type="text" value="Home"/></p> <p>Status: <input type="text" value="Good"/></p> <p>Line 1: <input type="text"/></p> <p>Line 2: <input type="text"/></p> <p>City,State: <input type="text"/> <input type="text"/></p> <p>Zip: <input type="text"/></p> <p>Country: <input type="text"/></p> <p>Change Code: <input type="text" value="Original Add"/></p> </div>		
Type	Optional Field	Select the type of address from the drop-down box
Status	Optional Field	Select the address status from the drop-down box
Line 1	Optional Field	Enter the first line of the street address
Line 2	Optional Field	Enter the second line of the street address
City	Optional Field	Enter the city
State	Optional Field	Enter the state
ZIP	Optional Field	Enter the ZIP code
Country	Optional Field	Enter the country
Change Code	Optional Field	Select the address change notification type/reason from the drop-down box. Please note that whenever you change or add an address, you must change or add the Change Code also.

Table 22: Add New People to Sentinel Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Job Information		
Job Information		
Employer: <input type="text"/> Job Title: <input type="text"/> Job Status: <input type="text" value="v"/> Job Code: <input type="text" value="v"/> Line 1: <input type="text"/> Line 2: <input type="text"/> City, State: <input type="text"/> <input type="text" value="v"/> Zip: <input type="text"/> Country: <input type="text" value="v"/>		
Employer	Optional Field	Enter the employer's name
Job Title	Optional Field	Enter the person's job title
Job Status	Optional Field	Select the person's job status from the drop-down box
Job Code	Optional Field	Select the person's job code from the drop-down box
Line 1	Optional Field	Enter the first line of the employer's street address
Line 2	Optional Field	Enter the second line of the employer's street address
City	Optional Field	Enter the employer's city
State	Optional Field	Enter the employer's state
ZIP	Optional Field	Enter the employer's ZIP code
Country	Optional Field	Enter the employer's country

Table 23: Add New People to Sentinel Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Lodge Information		
<div style="background-color: #e0f7fa; padding: 5px; margin-bottom: 5px;">Lodge Information</div> Name: <input type="text"/> Number: <input type="text"/> City: <input type="text"/> State: <input type="text"/>		
Name	Optional Field	Enter the Blue Lodge name
Number	Optional Field	Enter the Blue Lodge number
City	Optional Field	Enter the Blue Lodge city
State	Optional Field	Select the Blue Lodge state from the drop-down box
Telephone Numbers		
<div style="background-color: #e0f7fa; padding: 5px; margin-bottom: 5px;">Telephone Numbers</div> Home: <input type="text"/> Work: <input type="text"/> Cell: <input type="text"/>		
Home	Optional Field	Enter the person's home phone number
Work	Optional Field	Enter the person's work phone number
Cell	Optional Field	Enter the person's cell phone number
Email Addresses		
<div style="background-color: #e0f7fa; padding: 5px; margin-bottom: 5px;">Email Addresses</div> 1: <input type="text"/> <input type="radio"/> Preferred? 2: <input type="text"/> <input type="radio"/> Preferred?		
1	Optional Field	Enter the person's first email address
2	Optional Field	Enter the person's second email address
Preferred?	Optional Field	Click in the radio button to indicate that the email address is the person's primary email address. This is the email address that is used by Patriot.

Table 24: Add New People to Sentinel Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Signers		
<div style="background-color: #e0f7fa; padding: 2px; margin-bottom: 5px;">Signers</div> 1st: <input style="width: 150px; height: 15px;" type="text"/> 2nd: <input style="width: 150px; height: 15px;" type="text"/>		
1 st	Optional Field	Enter the name of the first signer for that person
2 nd	Optional Field	Enter the name of the second signer for that person
Spouse Name		
<div style="background-color: #e0f7fa; padding: 2px; margin-bottom: 5px;">Spouse Name</div> Spouse First Name: <input style="width: 150px; height: 15px;" type="text"/> Spouse Last Name: <input style="width: 150px; height: 15px;" type="text"/>		
Spouse First Name	Optional Field	Enter the first name of the person's spouse
Spouse Last Name	Optional Field	Enter the last name of the person's spouse

11.1.5 People Maintenance

People Maintenance refers to a series of screens used to keep track of personal information. People Maintenance is not a menu option; in order to find a record, use the [Search People](#) screen. The People Maintenance screens are:

- ❖ [Profile](#)
- ❖ [Other Addresses](#)
- ❖ [Other Member Information](#)
- ❖ [Offices/Volunteers](#)
- ❖ [Donations](#)
- ❖ [Notes](#)

People Maintenance can be used to keep track of both Members and non-Members (for example, a Member's spouse may have a separate record in the database.) However, certain screens in People Maintenance, such as Offices, only apply to Members.

11.1.5.1 Profile

The screenshot displays the 'Profile' screen for member H. G. Wells. At the top, there are navigation tabs: Members, Dues, Officers/Volunteers, Valley, Data Offloading, Admin, and Logout. Below these are sub-tabs: Profile, Other Addresses, Other Mem Info, Offices/Volunteer Groups, and Donations. The member ID is 3, and the name is H. G. Wells. The 'Member Name Information' section includes fields for Prefix (Dr.), First (Herbert), Middle (George), Last (Wells), Nickname (H. G.), Preferred Name (H. G. Wells), and Suffix. The Valley Status is Member, effective on 1/7/2004. The 'Primary Address' section shows a Home address at 18 Bluebird Lane, Baltimore, MD. The 'Telephone Numbers' section has fields for Home, Work, and Cell. The 'Birth and Degree Dates' section includes Birth (9/21/1986), 14*, 18*, 30*, 32*, 33*, and GC. The 'Email Addresses' section shows hgwells@tmemachin.com as the preferred email. The 'Spouse Name' section shows Isabel Wells. At the bottom, it notes the record was last modified on 1/7/2004 by Franklin - Supreme Council.

Figure 44: Sentinel Member Profile Screen

The Profile screen is used to edit information in existing records. It closely resembles the [Add New People to Sentinel](#) screen. The major difference is that this screen is used to edit information that already exists, while the **Add New People to Sentinel** screen is used only to add new information to the Sentinel database.

NOTE: DO NOT create a new record every time you wish to add or edit information. Use the [Search People](#) screen to locate the appropriate existing record, then use the Profile and other People Maintenance screens to edit the existing record. **It is extremely important to avoid creating duplicate records.** If you think you have created a duplicate record, notify your Valley Administrator and call Sentinel Technical Support at the Supreme Council, at (202) 232-3579.

Options in the Valley Status drop-down box may be set by a [Valley Administrator](#) using the [Valley Status Code Maintenance](#) screen.

Table 25: Sentinel Profile Fields and Buttons

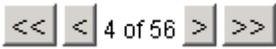
Field/Button Name	Field/Button Information	Field/Button Description
Member ID	Informational Field	Displays the person's Member ID number, if applicable
Return Button	Action Button	Click this button to return to the most recent search results screen.
	Action Buttons	A button with a single forward arrow (>) moves you forward one record. A button with a double forward arrow (>>) moves you to the last record in the record set. A button with a single backward arrow (<) moves you back one record. A button with a double backward arrow (<<) moves you to the first record in the record set. The numbers in the middle describe the current record and total number of records.
Save Button	Action Button	Use this button to save a new record or changes to an existing record.

Table 26: Sentinel Profile Fields and Buttons

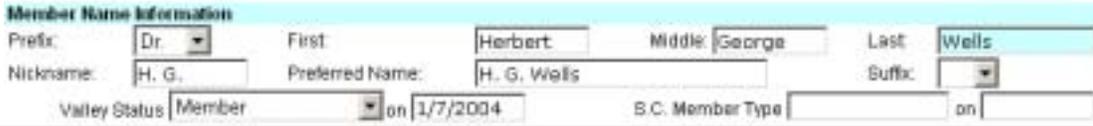
Field/Button Name	Field/Button Information	Field/Button Description
Member Name Information		
		
Prefix	Optional Field	Select a prefix from the drop-down box
First	Required Field	Records the person's first name
Middle	Optional Field	Records the person's middle name
Last	Required Field	Records the person's last name
Nickname	Optional Field	Records the person's nickname. Used as the Preferred Name in Patriot.
Preferred Name	Required Field	The Preferred Name is the name that appears in large letters at the top of the People Maintenance screens.
Suffix	Optional Field	Select a suffix from the drop-down box
Valley Status	Optional Field	This field defaults to Candidate, but you may change the Valley Status code using the drop-down box. Options in the Valley Status drop-down box can be edited using the Valley Status Code Maintenance screen.
On	Optional Field	Records the effective date of the current Valley Status code
S. C. Member Type	Informational Field	Displays the Supreme Council membership type.
On	Informational Field	Displays the effective date of the Supreme Council membership type.

Table 27: Sentinel Profile Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Primary Address		
<p>Primary Address</p> <p>Type: Home ▾</p> <p>Status: Good ▾</p> <p>Line 1: 18 Bluebird Lane</p> <p>Line 2:</p> <p>City,State: Baltimore MD ▾</p> <p>Zip:</p> <p>County:</p> <p>Country:</p> <p>Change Code: Original Add ▾</p>		
Type	Optional Field	Select the type of address from the drop-down box
Status	Optional Field	Select the address status from the drop-down box
Line 1	Optional Field	Records the first line of the street address
Line 2	Optional Field	Records the second line of the street address
City	Optional Field	Records the city
State	Optional Field	Records the state
ZIP	Optional Field	Records the ZIP code
Country	Optional Field	Records the country
Change Code	Optional Field	Select the address change notification type/reason from the drop-down box. Please note that whenever you change or add an address, you must change or add the Change Code also.

Table 28: Sentinel Profile Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description																		
S. C. Mem Valley, Eff Date and Status Code																				
<div style="display: flex; justify-content: space-between; align-items: center;"> SC Membership Status Selection - Expert Version Use Simple Version </div> <table style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <tr> <td style="width: 25%; text-align: center;">Valley</td> <td style="width: 25%; text-align: center;">Date</td> <td style="width: 25%; text-align: center;">Status</td> <td style="width: 25%; text-align: center;">Valley</td> <td style="width: 25%; text-align: center;">Date</td> <td style="width: 25%; text-align: center;">Status</td> </tr> <tr> <td>L1: <input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?</td> <td><input style="width: 80%; border: 1px solid #ccc;" type="text"/></td> <td><input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?</td> <td>L2: <input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?</td> <td><input style="width: 80%; border: 1px solid #ccc;" type="text"/></td> <td><input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?</td> </tr> <tr> <td>L3: <input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?</td> <td><input style="width: 80%; border: 1px solid #ccc;" type="text"/></td> <td><input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?</td> <td>L4: <input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?</td> <td><input style="width: 80%; border: 1px solid #ccc;" type="text"/></td> <td><input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?</td> </tr> </table>			Valley	Date	Status	Valley	Date	Status	L1: <input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?	<input style="width: 80%; border: 1px solid #ccc;" type="text"/>	<input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?	L2: <input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?	<input style="width: 80%; border: 1px solid #ccc;" type="text"/>	<input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?	L3: <input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?	<input style="width: 80%; border: 1px solid #ccc;" type="text"/>	<input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?	L4: <input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?	<input style="width: 80%; border: 1px solid #ccc;" type="text"/>	<input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?
Valley	Date	Status	Valley	Date	Status															
L1: <input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?	<input style="width: 80%; border: 1px solid #ccc;" type="text"/>	<input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?	L2: <input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?	<input style="width: 80%; border: 1px solid #ccc;" type="text"/>	<input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?															
L3: <input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?	<input style="width: 80%; border: 1px solid #ccc;" type="text"/>	<input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?	L4: <input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?	<input style="width: 80%; border: 1px solid #ccc;" type="text"/>	<input style="width: 80%; border: 1px solid #ccc;" type="text"/> ?															
S. C. Mem Valley, Eff Date and Status Code [Request Statistical Change] link	Hyperlink	Click on the link to open the Request Statistical Changes dialog box																		
L1-L4 – Valley	Informational Field	Displays the Valley/Orient information																		
L1-L4 – Date	Informational Field	Displays the level effective date																		
L1-L4 – Status	Informational Field	Displays the level status code																		
Telephone Numbers																				
<div style="background-color: #e0f7fa; padding: 5px; text-align: center; margin-bottom: 5px;">Telephone Numbers</div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Home: <input style="width: 90%; border: 1px solid #ccc;" type="text"/></td> <td style="width: 33%;">Work: <input style="width: 90%; border: 1px solid #ccc;" type="text"/></td> <td style="width: 33%;">Cell: <input style="width: 90%; border: 1px solid #ccc;" type="text"/></td> </tr> </table>			Home: <input style="width: 90%; border: 1px solid #ccc;" type="text"/>	Work: <input style="width: 90%; border: 1px solid #ccc;" type="text"/>	Cell: <input style="width: 90%; border: 1px solid #ccc;" type="text"/>															
Home: <input style="width: 90%; border: 1px solid #ccc;" type="text"/>	Work: <input style="width: 90%; border: 1px solid #ccc;" type="text"/>	Cell: <input style="width: 90%; border: 1px solid #ccc;" type="text"/>																		
Home	Optional Field	Records the person's home phone number																		
Work	Optional Field	Records the person's work phone number																		
Cell	Optional Field	Records the person's cell phone number																		

Table 29: Sentinel Profile Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Birth and Degree Dates		
Birth and Degree Dates		
Birth:	<input type="text"/>	14°: <input type="text"/>
30°:	<input type="text"/>	18°: <input type="text"/>
KCCH:	<input type="text"/>	32°: <input type="text"/>
		33°: <input type="text"/>
	GC: <input type="text"/>	
Birth	Search Criterion	Records the person's birth date
14°	Search Criterion	Records the person's fourteenth degree date
18°	Search Criterion	Records the person's eighteenth degree date
30°	Search Criterion	Records the person's thirtieth degree date
32°	Search Criterion	Records the person's thirty-second degree date
KCCH	Search Criterion	Records the person's KCCH date
GC	Search Criterion	Records the person's GC date
33°	Search Criterion	Records the person's thirty-third degree date
Email Addresses		
Email Addresses		
	1: <input type="text"/>	<input type="radio"/> Preferred?
	2: <input type="text"/>	<input type="radio"/> Preferred?
1	Optional Field	Records the person's first email address
2	Optional Field	Records the person's second email address
Preferred?	Optional Field	Click in the radio button to indicate that the email address is the person's primary email address

Table 30: Sentinel Profile Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Signers		
<div style="background-color: #e0ffff; padding: 2px; margin-bottom: 5px;">Signers</div> 1st: <input type="text"/> 2nd: <input type="text"/>		
1 st	Optional Field	Records the name of the first signer for that person
2 nd	Optional Field	Records the name of the second signer for that person
Spouse Name		
<div style="background-color: #e0ffff; padding: 2px; margin-bottom: 5px;">Spouse Name</div> Spouse First Name: <input type="text"/> Spouse Last Name: <input type="text"/>		
Spouse First Name	Optional Field	Records the first name of the person's spouse
Spouse Last Name	Optional Field	Records the last name of the person's spouse

11.1.5.2 Other Addresses

Figure 45: Sentinel Member Profile - Other Addresses Screen

Use this screen to record additional addresses. You can change this information without affecting the Preferred Address. You can enter two additional addresses, for a total of three per record. Fields with identical labels function identically in both Alternate Addresses.

Table 31: Sentinel Other Addresses Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Type	Optional Field	Select the type of address from the drop-down box
Status	Optional Field	Select the address status from the drop-down box
Line 1	Optional Field	Records the first line of the street address
Line 2	Optional Field	Records the second line of the street address
City	Optional Field	Records the city
State	Optional Field	Records the state
ZIP	Optional Field	Records the ZIP code
Country	Optional Field	Records the country

Field/Button Name	Field/Button Information	Field/Button Description
Change Code	Optional Field	Select the address change notification type/reason from the drop-down box. Please note that whenever you change or add an address, you must change or add the Change Code also.

11.1.5.3 Other Member Information

Figure 46: Sentinel Member Profile - Other Member Information Screen

This screen is used to record job information, dues summary information, Blue Lodge information, and other data items in the user-defined fields. Information in user-defined fields is *not* shared with Patriot.

Table 32: Sentinel Other Member Info Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Job Information		
Job Information		
Employer:	<input type="text"/>	Job Title: <input type="text"/>
Job Status:	<input type="text" value="Current"/>	Job Code: <input type="text"/>
Employer	Optional Field	Records the employer's name
Job Title	Optional Field	Records the person's job title
Job Status	Optional Field	Select the person's job status from the drop-down box
Job Code	Optional Field	Select the person's job code from the drop-down box

Table 33: Sentinel Other Member Info Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
User-Defined Fields		
User Defined Fields		
User Field 1:	<input type="text"/>	User Field 2:
User Field 3:	<input type="text"/>	User Field 4:
User Field 5:	<input type="text"/>	User Field 6:
User Field 7:	<input type="text"/>	User Field 8:
User Field 9:	<input type="text"/>	User Field 10:
[Field Name]	Optional Field	The Valley Administrator defines the fields using the User Defined Labels Maintenance screen. Each field holds a maximum of 50 characters, including spaces. Enter the information indicated by the label. Information in these fields is used only by Sentinel.
Member Dues Summary		
Member Dues Summary		
	Current Dues Year:	<input type="text" value="0"/>
	Current Statement Code:	<input type="text" value="C"/>
	Current Status Code:	<input type="text"/>
	Current Year Total Paid:	<input type="text" value="0"/>
	Current Year Due Balance:	<input type="text" value="-34.50"/>
	Past Due Balance:	<input type="text" value="0"/>
	Total Balance Due:	<input type="text" value="-34.50"/>
<input type="button" value="Show Yearly Dues Details"/>		
Current Dues Year	Optional Field	Records the current four-digit year for dues owed
Current Statement Code	Optional Field	Records the current statement code
Current Status Code	Optional Field	Records the current dues status code
Current Year Total Paid	Optional Field	Records the current amount of money paid for the year
Current Year Due Balance	Optional Field	Records the current amount of money owed for the year
Past Due Balance	Optional Field	Records the current amount of the past due balance

Field/Button Name	Field/Button Information	Field/Button Description
Total Balance Due	Optional Field	Records the current amount of the total balance owed
Show Yearly Dues Details Button	Action Button	Opens the Dues Details dialog box .
Lodge Information		
<p>Blue Lodge Information</p> <p>Lodge Name: <input type="text"/></p> <p>Lodge Number: <input type="text"/></p> <p>Lodge City: <input type="text"/></p> <p>Lodge State: <input type="text"/></p>		
Name	Optional Field	Records the Blue Lodge name
Number	Optional Field	Records the Blue Lodge number
City	Optional Field	Records the Blue Lodge city
State	Optional Field	Select the Blue Lodge state from the drop-down box

11.1.5.4 Offices/Volunteers

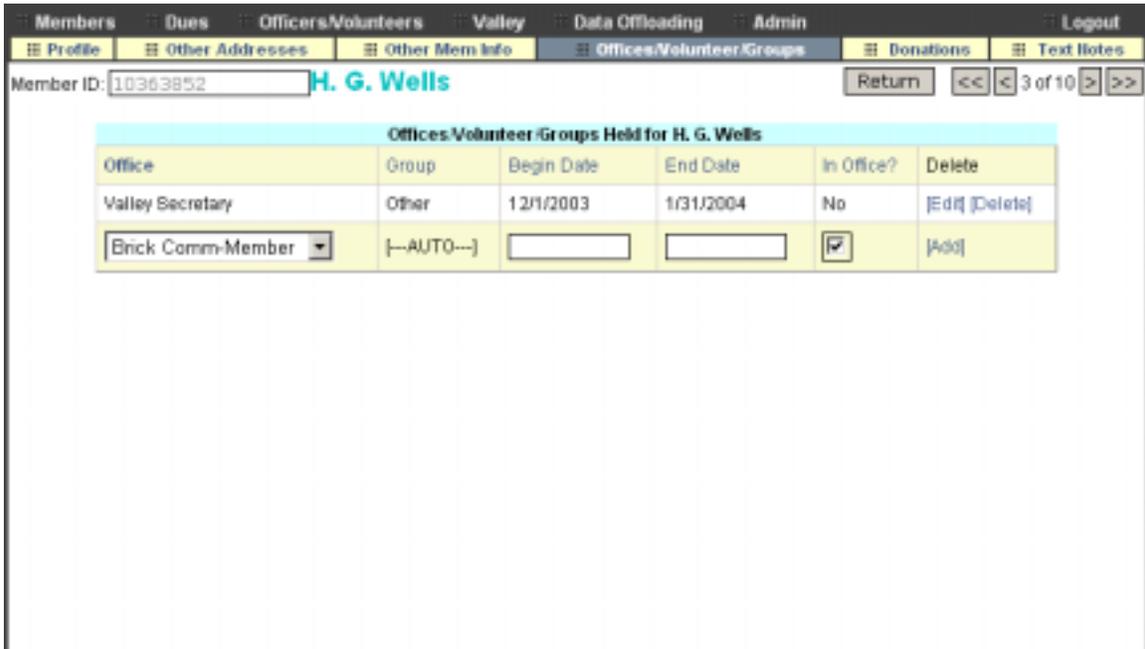
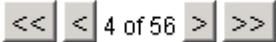


Figure 47: Sentinel Member Profile - Offices/Volunteers Screen

This screen records the offices and volunteer positions that are currently or previously were held by the Member.

Table 34: Sentinel Offices/Volunteers Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Return Button	Action Button	Click this button to return to the most recent search results screen.
	Action Buttons	A button with a single forward arrow (>) moves you forward one record. A button with a double forward arrow (>>) moves you to the last record in the record set. A button with a single backward arrow (<) moves you back one record. A button with a double backward arrow (<<) moves you to the first record in the record set. The numbers in the middle describe the current record and total number of records.

Field/Button Name	Field/Button Information	Field/Button Description
Office	Required Field	Select the Office from the drop-down box. Options in the Office drop-down box may be set by a Valley Administrator using the Valley Officer and Committees screen.
Group	Informational Field	Sentinel automatically completes the Group, based on the information entered in the Office drop-down box.
Begin Date	Optional Field	Enter the effective start date of the term in office
End Date	Optional Field	Enter the effective end date of the term in office
In Office	Optional Field	When a Member no longer holds an office, it is not necessary to delete the record. Instead, edit the record by adding an End Date and removing the check mark from the In Office checkbox.

11.1.5.5 Donations

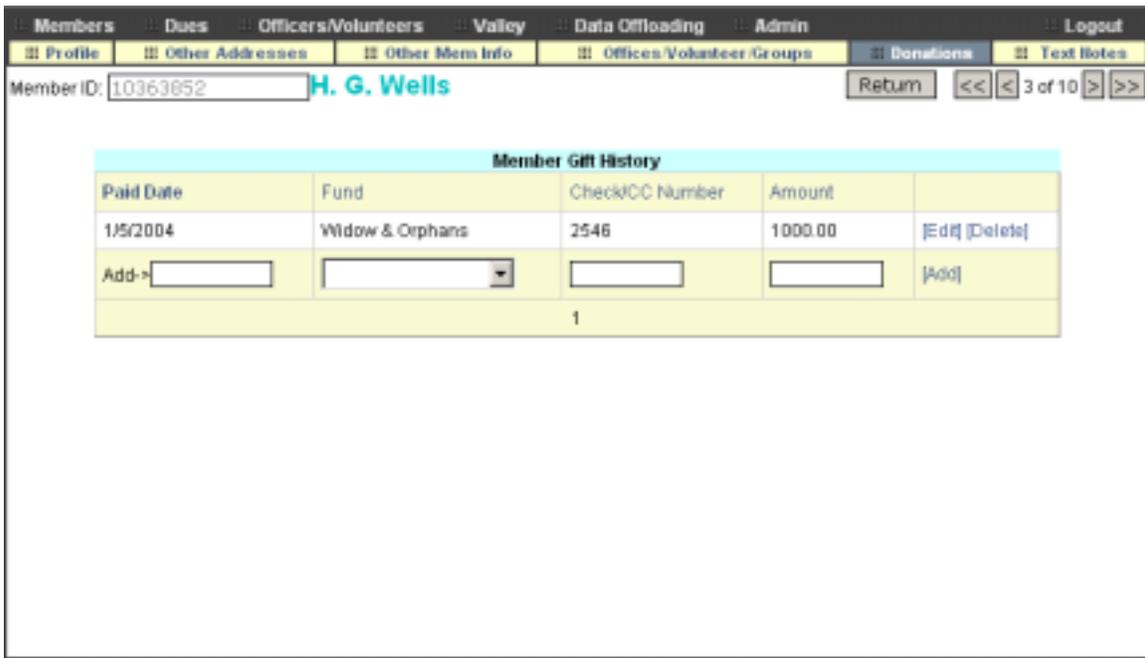
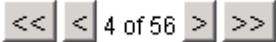


Figure 48: Sentinel Member Profile - Donations Screen

This screen lists information pertaining to all the donations previously given by a Member, including the date, amount, and specific fund. This is also where new gifts are recorded.

Table 35: Sentinel Donations Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Return Button	Action Button	Click this button to return to the most recent search results screen.
	Action Buttons	A button with a single forward arrow (>) moves you forward one record. A button with a double forward arrow (>>) moves you to the last record in the record set. A button with a single backward arrow (<) moves you back one record. A button with a double backward arrow (<<) moves you to the first record in the record set. The numbers in the middle describe the current record and total number of records.
Paid Date	Required Field	Records the date of the donation

Field/Button Name	Field/Button Information	Field/Button Description
Fund	Required Field	Select the fund from the drop-down box Options in the Fund drop-down box may be set by a Valley Administrator using the Gift Fund Maintenance screen.
Check/CC Number	Optional Field	Records the check or credit card number used to make the donation
Amount	Required Field	Records the amount of the donation
Edit Link	Action Link	Click the link to edit the record
Delete Link	Action Link	Click the link to delete the record
Add Link	Action Link	When you have completed the text of the Note, click the Add link to save the information

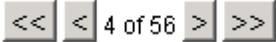
11.1.5.6 Notes



Figure 49: Sentinel Member Profile - Notes Screen

This screen allows you to attach free-form text notes to a record. You may add as many text notes to a record as required. Notes are not shared with Patriot.

Table 36: Sentinel Notes Screen Fields & Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Member ID	Informational Field	Displays the person's Member ID number, if applicable
Return Button	Action Button	Click this button to return to the most recent search results screen.
	Action Buttons	A button with a single forward arrow (>) moves you forward one record. A button with a double forward arrow (>>) moves you to the last record in the record set. A button with a single backward arrow (<) moves you back one record. A button with a double backward arrow (<<) moves you to the first record in the record set. The numbers in the middle describe the current record and total number of records.
Edit Link	Action Link	Click the link to edit the record
Delete Link	Action Link	Click the link to delete the record
Add Link	Action Link	When you have completed the text of the Note, click the Add link to save the information

Field/Button Name	Field/Button Information	Field/Button Description
Category	Optional Field	Select the Note category from the list provided. Options are set by the Valley Administrator using the Notes Category Maintenance screen.
Textual Note	Optional Field	Enter a note up to 7000 characters long

If you need to add a Notes Category, and you do not have access to the Admin menu, ask your System Administrator for assistance.

11.1.6 Generate a Form 330

This function replaces the paper version of the Form 330.

11.1.6.1 Generate a Form 330 – Initial Screen

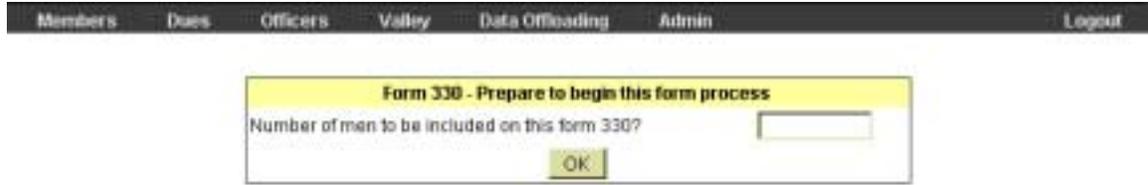


Figure 50: Sentinel Generate a Form 330 – Initial Screen

Table 37: Sentinel Generate a Form 330 – Initial Screen Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
OK Button	Action Button	Click this button to indicate that you are ready to proceed to the next step in the process
Number of men to be included on this Form 330	Required Field	You can add as many people as you like to the Form 330. Simply enter the number in the box provided.

When you click the **OK** button, Sentinel moves to the Generate a Form 330 Data Entry screen.

11.1.6.2 Generate a Form 330 – Data Entry Screen

This screen is used to select the people who will be invested, and to record the date of investiture. Information entered on this screen is sent to Patriot.

11.1.6.2.1 Special Instructions

Please read all the instructions before filling out the form.

ONLY USE THIS ONLINE FORM TO COMPLETE INITIATIONS, ADDITIONAL DEGREES, AND/OR AFFILIATIONS FROM OTHER JURISDICTIONS!

1. For each line, select the new member from your member list using the ? button.
2. Enter the appropriate dates of investitures.
3. Use the box below each member's selected name to indicate if the member is:
 - ❖ An initiation,
 - ❖ Receiving additional degrees, or
 - ❖ Affiliating from another jurisdiction
4. When done, click the Save button.
5. On the next screen, select **Click here to generate your Form 330 report** and print the report on 8.5" x 11" paper.
6. Enclose your Valley's check with the Form 330 you just printed and submit to the Supreme Council as usual. There is no need to submit a hand-written, yellow Form 330. The computer version is acceptable.

#	New Member	Chapter Date	Lodge Date	Council Date	Consistory Date
1	[?]				
	Type any special processing instructions for this new member here!				
2	[?]				
	Type any special processing instructions for this new member here!				
3	[?]				
	Type any special processing instructions for this new member here!				

[Save]

Figure 51: Sentinel Generate a Form 330 – Data Entry Screen

Table 38: Sentinel Generate a Form 330 – Date Entry Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
New Member	Required Field	Click on the ? button use the Lookup a Person function for each New Member text box. To enter a specific person's name into the Form 330, click the Select button on that particular row of search results.
Chapter Date	Optional Field	Date of investiture in the chapter
Lodge Date	Optional Field	Date of investiture in the lodge
Council Date	Optional Field	Date of investiture in the council
Consistory Date	Optional Field	Date of investiture in the consistory
Describe here if this is an:	Optional Field	Indicate if this is an: initiation, additional degree, or affiliation from other jurisdiction
Save Button	Action Button	Use this button to save a new record or changes to an existing record.

11.1.6.3 Generate a Form 330 – Generate Form Screen

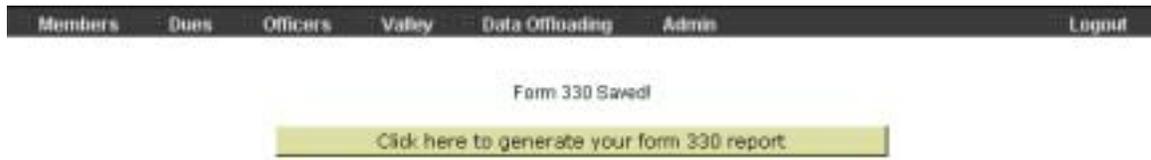


Figure 52: Sentinel Generate a Form 330 – Generate Form Screen

This is the final step in the process of generating a Form 330. All you need to do is click the **Click here to generate your Form 330 report** button, and go through the [Save/Download process](#).

11.1.7 Sojourner Search

The Sojourner Search function allows you to find Members who are paying dues to a lodge in a ZIP code that is different from their current home ZIP code. For example, a Member may reside in Florida, but pay dues to a lodge in his previous home state of Minnesota. The full Member record is not accessible, because the Member—and therefore, the Member record—belongs to a different Valley.

NOTE: *Sojourner searches are limited by Orient.* If the radius entered extends past the Orient's border, the search results will **not** include matches from another Orient.

The Sojourner Search screen has two tabs, **Sojourner ZIP Code Radius** tab and the **Sojourner ZIP Code Listing** tab. Each tab performs a different kind of search.

Searches may take a few minutes, so please click the **Search** button only *once* and allow the search to complete. You will see a message like the one shown in Figure 53 below. Click the **OK** button to continue.

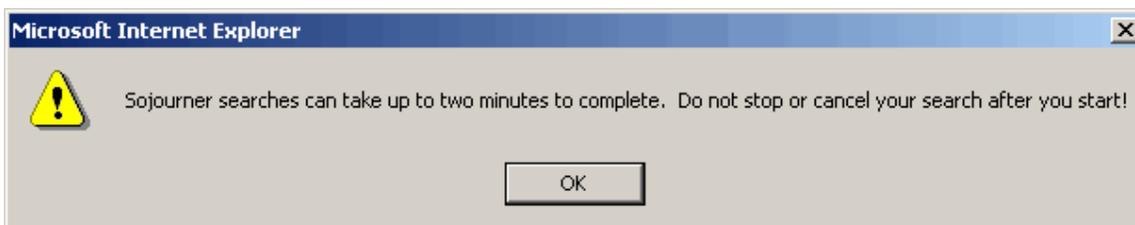


Figure 53: Sojourner Search Warning Message

DO NOT click on the IE Stop button and start the search again after it has started; doing so only slows down the server, and repeated attempts may cause the server to malfunction.

After you click the **OK** button, you will see a message on the screen that acknowledges that the search is underway.



Figure 54: Search in Progress Message

When the search is complete, you will see your results on the [Sojourner Search Results](#) screen.

11.1.7.1 Sojourner ZIP Code Radius Tab

The screenshot shows a web interface for a search function. At the top, there is a navigation bar with links: Members, Dues, Officers/Volunteers, Valley, Data Offloading, Admin, and Logout. Below this is a search interface with two tabs: 'Sojourner Zip Code Radius Search' (active) and 'Sojourner Zip Code Listing Search'. The main content area contains the text: 'To create a radius Sojourner search, enter the base zip code and the surrounding radius distance in miles:'. Below this text are two input fields: 'Base Zip Code:' followed by a text box, and 'Mileage Range From Base:' followed by a text box. Below the input fields is a 'Search' button.

Figure 55: Sentinel Sojourner Search – ZIP Code Radius

This search functions similarly to the [ZIP code radius search](#) on the Search People screen.

Table 39: Sentinel Sojourner ZIP Code Radius Search Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Base ZIP Code	Search Criterion	Enter the ZIP code around which you wish to search. NOTE: This field will not accept wildcard searches.
Miles Range from Base	Search Criterion	Enter the number of miles for the radius of the search.
Search Button	Action Button	Click this button to find matching records

11.1.7.2 Sojourner ZIP Code Listing Tab



Figure 56: Sentinel Sojourner Search – ZIP Code Listing

Table 40: Sentinel Sojourner ZIP Code Listing Search Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
ZIP Code List	Search Criteria	<p>You may enter a single ZIP code, multiple ZIP codes, a range of ZIP codes, or several ranges of ZIP codes as search criteria.</p> <p>Separate each ZIP code or ZIP code range in the list to search with a comma. <i>Example:</i> 46201, 46202, 46220-46226, 46228</p> <p>When you enter a range of ZIP codes, put a hyphen between the first and last ZIP codes. <i>Example:</i> 46201-46210</p> <p>Separate multiple ranges with commas. <i>Example:</i> 46201-46210, 47401-47410, 49601-49610</p> <p>NOTE: This field will not accept wildcard searches.</p>
Search Button	Action Button	Click this button to find matching records

11.1.8 Sojourner Search Results



Figure 57: Sentinel Sojourner Search Results Screen

This screen displays a list of all Members from other Valleys who have a Primary Address within the selected radius of the base ZIP code. Complete Member Records from other Valleys are not available, nor is the information displayed on the Sojourner Search Results screen editable.

Table 41: Sentinel Sojourner Search Results Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
New Search Button	Action Button	Click on the button to discard the current search results and begin a new search
Export to Excel Button	Action Button	This button appears on screens that allow you to save a set of records as an MS Excel spreadsheet. For more information about this process, see Saving Reports and Data Extracts .
Reports Button	Action Button	Click this button to see the list of available reports.

The following reports are available from the Sojourner Search Results screen:

- ❖ [Blue Lodge Information Report](#)
- ❖ [Degree Date Listing](#)
- ❖ [Member Directory Listing](#)
- ❖ [Member Dues Information](#)
- ❖ [People Labels](#)

11.2 Dues

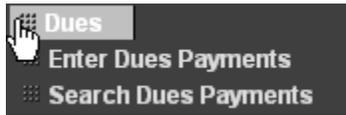


Figure 58: Sentinel Dues Menu

11.2.1 Create a New Dues Payment Batch

This screen opens when you select **Enter Dues Payment** from the Dues menu.

 A screenshot of a web form titled "Dues Payment Entry". The title bar is light blue and contains the text "Dues Payment Entry" and "Please Provide Deposit Date for this Payment Batch". Below the title bar, there is a label "Deposit Date:" followed by a text input field. At the bottom of the form is a grey button with the text "Proceed To Payment Entry".

Figure 59: Sentinel Create a New Dues Payment Batch Screen

This screen is the first step in the Dues Payment Entry process.

Table 42: Sentinel Create a New Dues Payment Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Deposit Date	Required Field	Enter the deposit date
Proceed to Payment Entry Button	Action Button	Click on the button to go to the next step

11.2.2 Enter Dues Payment

The screenshot shows the 'Enter Dues Payment' screen in the Sentinel application. At the top, there is a navigation bar with the following items: Members, Dues, Officers/Volunteers, Valley, Data Offloading, Admin, and Logout. The main content area is titled 'Enter Dues Payment' and contains a form with the following fields and buttons:

- Navigation: <<, <, 1 of 1, >, >>, Save Payment, Reports
- Member ID: 10363852, ?
- Name: H. G. Wells
- Total Due: -49.50
- Check Number: [Empty]
- Dues Payment Amount: [Empty]
- Box 1 Amount: [Empty]
- Almoner's Fund Line 1: [Empty]
- Widows & Orphans: [Empty]
- Deposit Date: 2/4/2004
- Member's Primary Address: 18 Bluebird Lane
- Line 2: [Empty]
- City: Baltimore
- State: MD
- Zip: [Empty]
- Country: [Empty]
- Change Source: [Empty]
- Buttons: Show Yearly Dues Details, Update Address

Figure 60: Sentinel Enter Payment Screen

This screen is the second step in the Dues Payment Entry process. Click on the ? button use the [Lookup a Member](#) function for each payment that you wish to enter. To enter a specific person's name on the payment screen, click the **Select** button on that particular row of search results. When you select the Member, Sentinel retrieves the Member Record dues information, and refreshes the screen. The Member's Primary Address information and name are automatically filled in. Information in this screen is shared with Patriot.

NOTE: If you enter an amount in the Dues Payment Amount text box that is more than the amount due, Sentinel notifies you. You may proceed to enter the amount, and the appropriate credit amount shows on the Member's record.

After you have entered all the payment information, click the **Save** button. Sentinel saves the information to the database and refreshes the screen. The refreshed screen is blank so that you can enter another payment.

If you wish to review a dues payment record that you have already created, then use the back arrows (< or <<) to scroll through the record. Some of the text boxes have been grayed out and can no longer be edited. Also, the buttons are different.

Enter Dues Payment Saved!

2 of 2

Member ID: ... Name:
 Total Due: **Member's Primary Address**
 Check Number: Line 1:
 Dues Payment Amount: Line 2:
 Box 1 Amount: City:
 Box 2 Amount: State:
 Box 3 Amount: Zip:
 Deposit Date: Country:
 Change Source:

Figure 61: Sentinel Saved Payment Record

NOTE: Dues payments may not be edited after the information has been saved. To change the information, delete the payment record and re-enter the information in a new record. Then, save the new record.

Table 43: Sentinel Enter Dues Payment Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
	Action Buttons	A button with a single forward arrow (>) moves you forward one record. A button with a double forward arrow (>>) moves you to the last record in the record set. A button with a single backward arrow (<) moves you back one record. A button with a double backward arrow (<<) moves you to the first record in the record set. The numbers in the middle describe the current record and total number of records.
Save Payment Button	Action Button	Use this button to save a new record or changes to an existing record
Reports Button	Action Button	Click this button to see the list of available reports

Field/Button Name	Field/Button Information	Field/Button Description
Member ID	Required Field	Enter the Member ID number or use the ? button to search for a Member
Name	Required Field	If you have selected the Member ID using the Member Lookup function, then this information is filled in automatically.
Total Due	Required Field	Records the total amount owed by the Member
Check Number	Optional Field	Enter the number of the check used to pay the dues
Dues Payment Amount	Required Field	Enter the amount of the Dues payment
Box 1 Amount	Optional Field	If the member has made an additional donation to a gift fund, enter the amount in this field
Box 2 Amount	Optional Field	If the member has made an additional donation to a gift fund, enter the amount in this field
Box 3 Amount	Optional Field	If the member has made an additional donation to a gift fund, enter the amount in this field
Deposit Date	Informational Field	Displays the date entered on the Create a New Dues Payment Batch screen
Show Yearly Dues Details	Action Button	Opens the Dues Details dialog box

Table 44: Sentinel Enter Dues Payment Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Member's Primary Address		
<div style="background-color: #e0f7fa; padding: 5px; margin-bottom: 10px;">Member's Primary Address</div> Line 1: <input type="text"/> Line 2: <input type="text"/> City: <input type="text"/> State: <input type="text" value="▼"/> Zip: <input type="text"/> Country: <input type="text"/> Change Source: <input type="text"/> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Update Address"/> </div>		
Line 1	Optional Field	Records the first line of the street address
Line 2	Optional Field	Records the second line of the street address
City	Optional Field	Records the city
State	Optional Field	Records the state
ZIP	Optional Field	Records the ZIP code
Country	Optional Field	Records the country
Change Code	Optional Field	Select the address change notification type/reason from the drop-down box. Please note that whenever you change or add an address, you must change or add the Change Code also.
Update Address Button	Action Button	Click the button to edit the member's address information

11.2.3 Search Dues Payments

Please see the [Advanced Search Examples](#) for additional information about searching.

Figure 62: Sentinel Search Dues Payments Screen – Before Searching

This screen is used to search for dues payment information. After the search is complete, the information displays and the buttons on the screen changes to the [Search Dues Payments Results](#) screen.

Table 45: Sentinel Search Dues Payment Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Search Payments Button	Action Button	Click to search for dues payment records that match the criteria you have entered
Member ID	Search Criterion	Use this field to search by Member ID number. Enter the Member ID number or use the ? button to search for a Member.
Last/First Name	Search Criterion	Use this field to search by Member name. Enter the Member's last name in the first box and/or the member's first name in the second box
Check Number	Search Criterion	Use this field to search by check number

Field/Button Name	Field/Button Information	Field/Button Description
Dues Payment Amount	Search Criterion	Use this field to search by the amount paid for dues
Box 1 Amount	Search Criterion	Use this field to search by the amount donated to the gift fund
Box 2 Amount	Search Criterion	Use this field to search by the amount donated to the gift fund
Box 3 Amount	Search Criterion	Use this field to search by the amount donated to the gift fund
Deposit Date	Search Criterion	Use this field to search by deposit date
Entered by	Search Criterion	Use this field to search by the name of the person who created the deposit record
Entered on	Search Criterion	Use this field to search by the date that the deposit record was created

You can run the [Dues Payment Processing](#) report from this page by clicking the Reports button and selecting **Dues Payment Processing**.

11.2.4 Search Dues Payments Results

4 Payments Found

Member ID	Name	Deposit Date	Payment Amount
55 [REDACTED]	Smith, [REDACTED]	12/1/2003	1000.0000
55 [REDACTED]	Smith, [REDACTED]	12/17/2003	0
55 [REDACTED]	Smith, [REDACTED]	12/17/2003	0
97 [REDACTED]	Smith, [REDACTED]	12/17/2003	0

Figure 63: Sentinel Search Dues Payments Results Screen

This screen provides links to the dues payment records that match the search criteria entered on the [Search Dues Payments](#) screen.

Table 46: Sentinel Browse Dues Search Results Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Member ID Link	Hyperlink	Click on the link to view the related record
Name Link	Hyperlink	Click on the link to view the related record
Deposit Date Link	Hyperlink	Click on the link to view the related record
Payment Amount Link	Hyperlink	Click on the link to view the related record

11.2.5 View Dues Payment



Figure 64: Sentinel View Dues Payment Screen

This screen appears after you have selected a dues payment record to view from the [Search Dues Payments Results](#) screen.

NOTE: Fields that are grayed out may not be modified. Buttons that are grayed out are not operational.

Table 47: Sentinel View Dues Payments Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
	Action Buttons	A button with a single forward arrow (>) moves you forward one record. A button with a double forward arrow (>>) moves you to the last record in the record set. A button with a single backward arrow (<) moves you back one record. A button with a double backward arrow (<<) moves you to the first record in the record set. The numbers in the middle describe the current record and total number of records.
Delete Payment Button	Action Button	Click this button to delete the payment record from the database. You cannot undo this action.
Reports Button	Action Button	Click this button to see the list of available reports

Field/Button Name	Field/Button Information	Field/Button Description
Member ID	Informational Field	Displays the Member ID number
Name	Informational Field	Displays the Member's name
Check/CC Number	Informational Field	Displays the check or credit card number used to make the original payment
Amount Boxes	Informational Fields	Displays the amount designated for each fund, if any
Deposit Date	Informational Field	Displays the date that the deposit record was created
Show Yearly Dues Details Button	Action Button	Opens the Dues Details dialog box .

You can run the [Dues Payment Processing](#) report from this page by clicking the Reports button and selecting **Dues Payment Processing**.

11.3 Officers/Volunteers

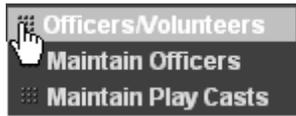


Figure 65: Sentinel Officers/Volunteers Menu

11.3.1 Valley Officer Maintenance

This screen is used to maintain the Valley's officer structure in Sentinel. Officer assignments automatically transfer to Patriot. This screen has both a search function and a data entry function. It functions similarly to the [Play Cast Maintenance](#) screen.

When you first open this screen, the entire list of Valley officers is displayed. Information on this screen is shared with Patriot.

Office	Group	Name	Begin Date	End Date	In Office?	
						[Add]

1

Figure 66: Sentinel Officer Maintenance Screen

If you wish to see only a subset of the list, you can narrow it down using the **Find** function at the top of the screen. Select your criteria in the drop-down boxes in the top section of data fields, and click the **Find** button. You must select at least one item in order to sort out the list.

Table 48: Sentinel Valley Officer Maintenance Fields and Buttons

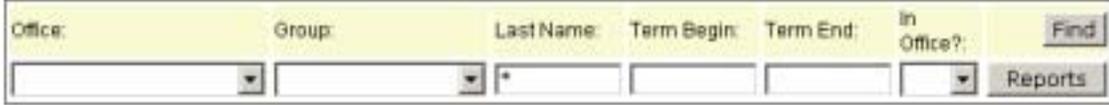
Field/Button Name	Field/Button Information	Field/Button Description
Search		
		
Find Button	Action Button	Click this button to start a search, after you have filled in at least one search criterion.
Reports Button	Action Button	Click this button to see the list of available reports
Office	Search Criterion	Options in the Office drop-down box may be set by a Valley Administrator using the Valley Officer and Committees screen. Select the office that you wish to search for.
Group	Search Criterion	Select the group that you wish to search for
Last Name	Search Criterion	Enter the last name of the officeholder that you wish to search for
Term Begin	Search Criterion	Select the start date of the office record that you wish to search for
Term End	Search Criterion	Select the end date of the office record that you wish to search for
In Office	Search Criterion	Select either active or inactive officer records

Table 49: Sentinel Valley Officer Maintenance Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description																																																																																				
Add																																																																																						
17 Officers Found																																																																																						
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Active	Optional Field	Indicate whether the officeholder is currently active by placing a check mark in the checkbox																																																																																				

11.3.2 Play Cast Maintenance

This screen is used to maintain information about cast Members for Degree plays. The cast lists for Degree plays 4-32 are defined in Sentinel and ready for use. This tool allows Valleys to keep track of all the Members who know a specific part in a Degree play. The last date that the Member performed the role also appears on the play cast record, if you choose to enter this information. This screen functions similarly to the [Valley Officer Maintenance](#) screen.

7 Cast Members Found

Role	Play	Name	First Acted	Last Acted	Active?	
1st Voice	04*	Alban, [REDACTED]	10/10/2002		Yes	[Edit] [Delete]
2nd Voice	04*	Adshead, [REDACTED]	12/15/2000	12/15/2003	Yes	[Edit] [Delete]
3rd Voice	04*	Alban, [REDACTED]			Yes	[Edit] [Delete]
Asst. Expert	04*	Pairo, [REDACTED]	1/15/1999	10/19/2003	Yes	[Edit] [Delete]
Capt. of Guard	04*	Marlin, [REDACTED]		1/1/2003	Yes	[Edit] [Delete]
Master of Ceremonies	04*	Jones, [REDACTED]	10/2/1998	5/11/2003	Yes	[Edit] [Delete]
Orator	04*	Smith, [REDACTED]			Yes	[Edit] [Delete]
<input type="text"/>	<input type="text"/>	<input type="text"/> ? x	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	[Add]

1

Figure 67: Sentinel Play Cast Maintenance Screen

This screen is used to maintain the various casts for plays in Sentinel.

When you first open this screen, the entire list of people who have participated in plays is displayed. If you wish to see only a subset of the list, you can narrow it down using the search function at the top of the screen. Select your criteria in the top section of data fields, and click the **Find** button. You must select at least one item in order to sort out the list.

Table 50: Sentinel Play Cast Maintenance Fields and Buttons

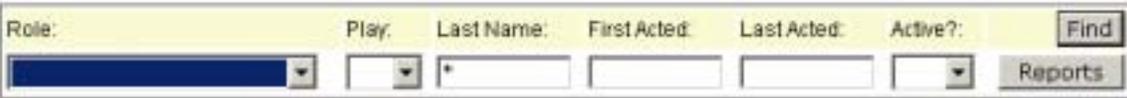
Field/Button Name	Field/Button Information	Field/Button Description
Search		
		
Find Button	Action Button	Click this button to start a search, after you have filled in at least one search criterion.
Reports Button	Action Button	Click this button to see the list of available reports
Role	Search Criterion	Select the role that you wish to search for.
Play	Search Criterion	Select the play that you wish to search for
Last Name	Search Criterion	Select the last name of the member that you wish to search for
First Acted	Search Criterion	Select the earliest date that the member first acted in the play
Last Acted	Search Criterion	Select the most recent date that the member acted in the play
Active	Search Criterion	Select either active or inactive members records

Table 51: Sentinel Play Cast Maintenance Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description																																																															
Add																																																																	
<i>7 Cast Members Found</i>																																																																	
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Active	Optional Field	Indicate whether the member is currently active in the play by placing a check mark in the checkbox																																																															

11.4 Valley

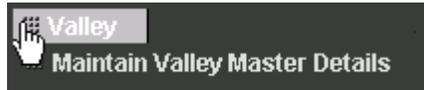


Figure 68: Sentinel Valley Menu

11.4.1 Maintain Valley Details

 A screenshot of a web-based form titled 'Maintain Valley Details'. The form is organized into several sections:

- Navigation:** Members, Dues, Officers/Volunteers, Valley, Data Offloading, Admin, Logout.
- Header Fields:** ValleyIDName: 344, Baltimore, Orient: Maryland, Save, Refresh.
- Official Address Information:**
 - Line 1: Baltimore SR Bodies
 - Line 2: 3800 N. Charles Street
 - City, State: Baltimore, MD
 - Zip, Country: 21218-1805, USA
 - Valley Phone: 410-243-3200
 - Valley Fax: 410-243--3232
 - Valley Email: aasr@erol.net
 - Valley Website:
- Renewal Address Information:**
 - Line 1: Baltimore SR Bodies
 - Line 2: 3800 N. Charles Street
 - City, State: Baltimore, MD
 - Zip, Country: 21218-1805, USA
- Invoice Address Information:**
 - Line 1: SEC A&A Scottish Rite
 - Line 2: 3800 N. Charles Street
 - City, State: Baltimore, MD
 - Zip, Country: 21218-1805, USA
- Dues:**

Level1Amount:	12.3300	SpecialAmount1:	100.0000
Level2Amount:	1.0000	SpecialAmount2:	21.0000
Level3Amount:	12.2000	SpecialAmount3:	43.3300
Level4Amount:	12.0000	SpecialAmount4:	43.2200
		SpecialAmount5:	52.3000
- Dues Notices Funds:**
 - Box 1 Fund for Notice Description: Widow & Orphans
 - Box 2 Fund for Notice Description: Almoner's Fund2
 - Box 3 Fund for Notice Description:

At the bottom, there is a small text line: 'Last Sentinel Valley mod by samartin on: 12/20/2003 - Last Supreme Council mod by on:'

Figure 69: Sentinel Maintain Valley Details Screen

This screen maintains detail information about the Valley. Some data items, such as the Valley ID/Name, and Orient are not editable, and display only for informational purposes.

Three types of addresses can be maintained on this screen—the official address for the Valley, the renewal address, and the invoice address. Please note that all address fields on the screen function exactly alike. Dues and Gift Fund information are also maintained on this screen.

11.4.1.1 Dues

The dues amount for each level can be set individually. This item is used in calculations and reports throughout Sentinel. Dues information is shared with Patriot.

Table 52: Sentinel Maintain Valley Details Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
ValleyIDName: <input type="text" value="344"/> <input type="text" value="Baltimore"/> Orient: <input type="text" value="Maryland"/> <input type="button" value="Save"/> <input type="button" value="Refresh"/>		
Save Button	Action Button	Use this button to save a new record or changes to an existing record.
Refresh Button	Action Button	When you edit a record, the information that you change can affect other data items on the same screen. Clicking refresh allows you to see your changes.
Valley ID	Informational Field	Displays the Valley's ID number
Valley Name	Informational Field	Displays the Valley's Name
Orient	Informational Field	Displays the Valley's Orient

Table 53: Sentinel Maintain Valley Details Fields and Buttons

NOTE: Address fields function identically for all types of addresses.

Field/Button Name	Field/Button Information	Field/Button Description
Address Information		
Official Address Information		
Line 1:	<input type="text" value="Baltimore SR Bodies"/>	Valley Phone: <input type="text" value="410-243-3200"/>
Line 2:	<input type="text" value="3800 N. Charles Street"/>	Valley Fax: <input type="text" value="410-243--3232"/>
City,State:	<input type="text" value="Baltimore"/> <input type="text" value="MD"/>	Valley Email: <input type="text" value="aasr@erol.net"/>
Zip, Country:	<input type="text" value="21218-1805"/> <input type="text" value="USA"/>	Valley Website: <input type="text"/>
Renewal Address Information		
Line 1:	<input type="text" value="Baltimore SR Bodies"/>	
Line 2:	<input type="text" value="3800 N. Charles Street"/>	
City,State:	<input type="text" value="Baltimore"/> <input type="text" value="MD"/>	
Zip, Country:	<input type="text" value="21218-1805"/> <input type="text" value="USA"/>	
Invoice Address Information		
Line 1:	<input type="text" value="SEC A&A Scottish Rite"/>	
Line 2:	<input type="text" value="3800 N. Charles Street"/>	
City,State:	<input type="text" value="Baltimore"/> <input type="text" value="MD"/>	
Zip, Country:	<input type="text" value="21218-1805"/> <input type="text" value="USA"/>	
Line 1	Optional Field	Records the first line of the street address
Line 2	Optional Field	Records the second line of the street address
City	Optional Field	Records the city
State	Optional Field	Records the state
ZIP	Optional Field	Records the ZIP code
Country	Optional Field	Records the country
Valley Phone	Optional Field	Records the Valley's primary phone number
Valley Fax	Optional Field	Records the Valley's primary fax number
Valley Email	Optional Field	Records the Valley's primary email address
Valley Website	Optional Field	Records the URL of the Valley's website

Table 54: Sentinel Maintain Valley Details Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Dues		
Dues		
Level1Amount:	<input type="text" value="12.3300"/>	SpecialAmount1: <input type="text" value="100.0000"/>
Level2Amount:	<input type="text" value="1.0000"/>	SpecialAmount2: <input type="text" value="21.0000"/>
Level3Amount:	<input type="text" value="12.2000"/>	SpecialAmount3: <input type="text" value="43.3300"/>
Level4Amount:	<input type="text" value="12.0000"/>	SpecialAmount4: <input type="text" value="43.2200"/>
		SpecialAmount5: <input type="text" value="52.3000"/>
Level1Amount	Optional Field	Records the annual dues amount for a Level 1 membership
Level2Amount	Optional Field	Records the annual dues amount for a Level 2 membership
Level3Amount	Optional Field	Records the annual dues amount for a Level 3 membership
Level4Amount	Optional Field	Records the annual dues amount for a Level 4 membership
SpecialAmount1	Optional Field	The Special Amount boxes are for alternate dues amounts. These special dues amounts are applied to the Member record in the Dues Master Record function.
SpecialAmount2	Optional Field	
SpecialAmount3	Optional Field	
SpecialAmount4	Optional Field	
SpecialAmount5	Optional Field	
Dues Notices Funds		
Dues Notices Funds		
Box 1 Fund for Notice Description:	<input type="text" value="Test Fund 1"/>	
Box 2 Fund for Notice Description:	<input type="text" value="Almoner's Fund2"/>	
Box 3 Fund for Notice Description:	<input type="text" value="Widow & Orphans"/>	
Box 1 Fund for Notice Description	Optional Field	The choices for the drop-down boxes in this are set in the Gift Fund Maintenance screen. Use these drop-down boxes to select the funds that appear on the Dues renewal notices.
Box 2 Fund for Notice Description	Optional Field	
Box 3 Fund for Notice Description	Optional Field	

11.5 Data Offloading

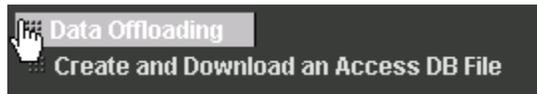


Figure 70: Sentinel Data Offloading Menu

Sentinel can prepare a snapshot of Valley data in an MS Access format, available for download. Additionally, each Valley may trigger a regeneration of the MS Access snapshot to be downloaded. A regenerated snapshot needs about an hour to complete.

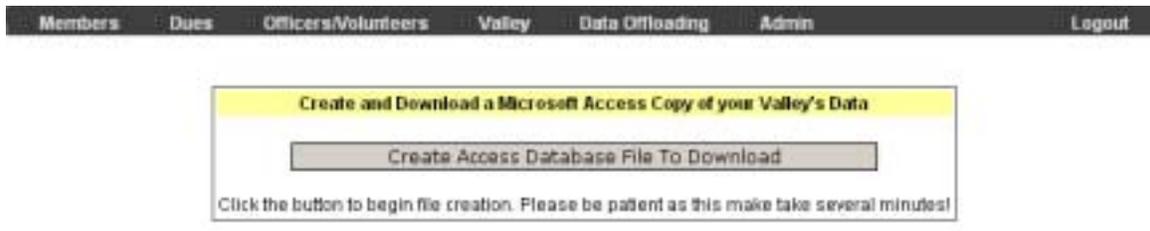


Figure 71: Sentinel Data Offloading Screen

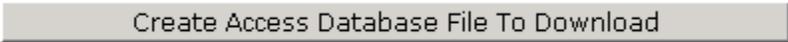
This local copy of the database may be used for secure storage, disconnected data browsing, and custom reporting using any reporting tool that supports MS Access.

The Valley's snapshot database includes the following tables:

- ❖ Member Table
- ❖ Activity Table
- ❖ Registration Table
- ❖ Gift History Table
- ❖ Valley Information Table
- ❖ Officers Table
- ❖ Committee Assignments Table
- ❖ Casts Table

11.5.1 Create and Download an MS Access Database

To create a snapshot database, select this option from the Data Offloading menu. Simply click the button to start the process.



Create Access Database File To Download

Figure 72: Sentinel Database Creation Button

After the database has been created, Sentinel displays a message like the one shown in Figure 73 below, and allows you to download the database.

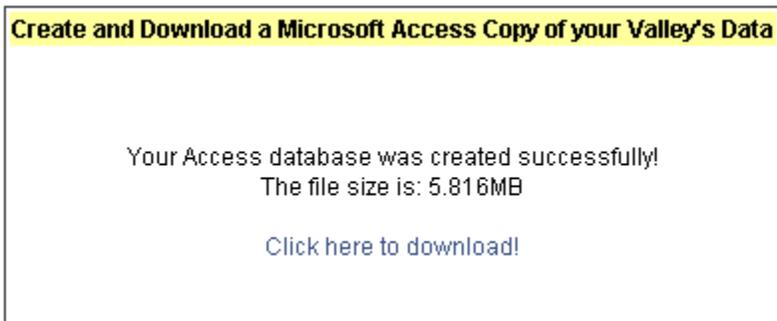


Figure 73: Sentinel Database Creation Message & Link

Click the **Click here to download** link and follow the [steps to save a file](#).

12 Dialog Boxes

12.1.1 Lookup a Person

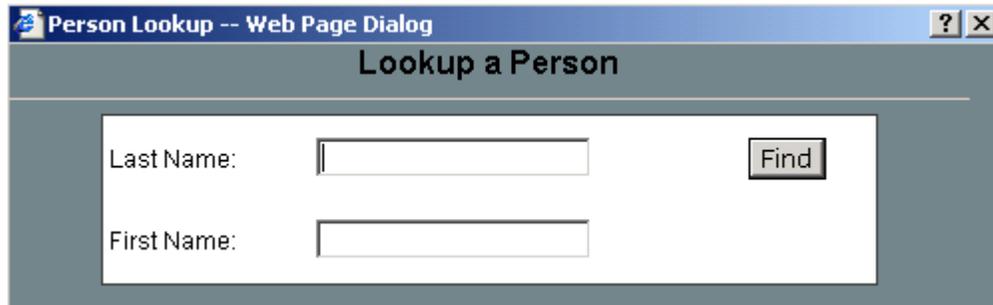


Figure 74: Sentinel Lookup a Person Dialog Box

This dialog box is a simplified search screen. You can search by last name, first name, or both. Please note that Sentinel finds exact matches only. For example, if you type “Wells” into the last name text box, variant spellings such as “Welles” do not appear.

Please see the [Advanced Search Examples](#) for additional information about searching.

Table 55: Sentinel Lookup a Person Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Find Button	Action Button	Click this button to initiate a search
First	Search Criterion	Use this field to search for a person by first name
Last	Search Criterion	Use this field to search for a person by last name

12.1.2 Lookup a Member

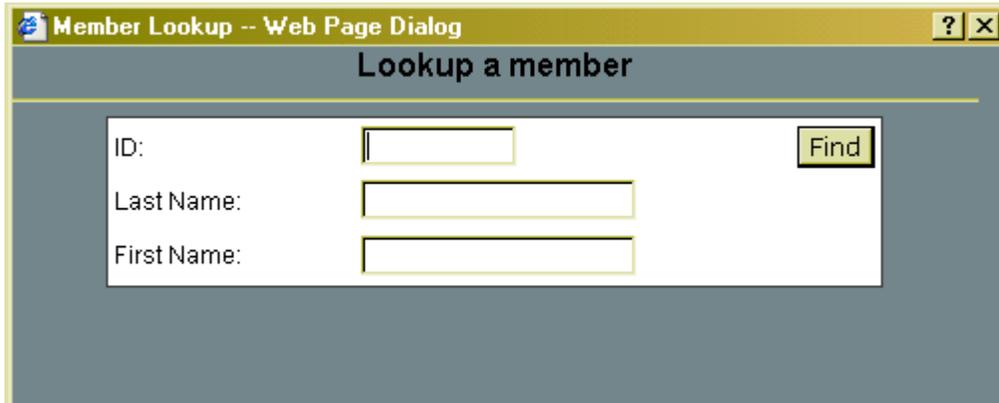


Figure 75: Sentinel Lookup a Member Dialog Box

This dialog box is a variation of the [Lookup a Person](#) dialog box. The only difference is that the Lookup a Member dialog box offers the additional option of searching by a Member ID number. (You can search by any combination of Member ID, last name, and first name.) Please note that Sentinel finds exact matches only. For example, if you type “Wells” into the last name text box, variant spellings such as “Welles” do not appear.

Please see the [Advanced Search Examples](#) for additional information about searching.

Table 56: Sentinel Lookup a Member Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Find Button	Action Button	Click this button to initiate a search
ID	Search Criterion	Use this field to search for a person by member ID number
First	Search Criterion	Use this field to search for a person by first name
Last	Search Criterion	Use this field to search for a person by last name

12.1.3 Request Statistical Change

Access this function by clicking on the **SC Valley Membership, Effective Date, and Status Code** link on the [Member Profile](#) screen.

Request Statistical Change For Member

Current Membership Status for Member			
Level	Valley	Status	Effective Beginning On
Lodge:	Baltimore	D	
Chapter:	Baltimore	D	
Council:	Baltimore	D	
Consistory:	Baltimore	D	

Proposed Membership Status for Member			
Level	Valley	Status	Effective Beginning On
Lodge:	Baltimore		
Chapter:	Baltimore		
Council:	Baltimore		
Consistory:	Baltimore		

Optional note explaining this request

Save this Request

http://patriotssupport.net:8080/People/RequestStatistical Internet

Figure 76: Sentinel Request Statistical Change Dialog Box

Status may be changed at any level or combination of levels. For each level changed, please enter a status effective date.

Current statistical information is displayed for informational purposes, but cannot be edited. When a change is requested, the information is [queued for review](#) by the Supreme Council. Until the requested change is reviewed, no further statistical changes can be requested for the same record. If you attempt to enter another change before the previous change is processed, the system produces the message shown in Figure 77 below (with appropriate information):

There is a pending request from lirapkin submitted on 1/13/2004 2:11:40 PM that has not been processed by the Supreme Council. No further statistical changes may be requested until the current request is reviewed.

Figure 77: Previous Request Statistical Changes Message

The **Save This Request** button does not appear, and you cannot save your changes.

Table 57: Sentinel Request Statistical Change Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description																								
Current Membership Status Information																										
Request Statistical Change For Member																										
<table border="1"> <thead> <tr> <th colspan="4">Current Membership Status for Member</th> </tr> <tr> <th>Level</th> <th>Valley</th> <th>Status</th> <th>Effective Beginning On</th> </tr> </thead> <tbody> <tr> <td>Lodge:</td> <td>Salisbury</td> <td>D</td> <td>3/22/1999</td> </tr> <tr> <td>Chapter:</td> <td>Salisbury</td> <td>D</td> <td>4/12/1999</td> </tr> <tr> <td>Council:</td> <td>Salisbury</td> <td>D</td> <td>4/19/1999</td> </tr> <tr> <td>Consistory:</td> <td>Baltimore</td> <td>C</td> <td>5/1/1999</td> </tr> </tbody> </table>			Current Membership Status for Member				Level	Valley	Status	Effective Beginning On	Lodge:	Salisbury	D	3/22/1999	Chapter:	Salisbury	D	4/12/1999	Council:	Salisbury	D	4/19/1999	Consistory:	Baltimore	C	5/1/1999
Current Membership Status for Member																										
Level	Valley	Status	Effective Beginning On																							
Lodge:	Salisbury	D	3/22/1999																							
Chapter:	Salisbury	D	4/12/1999																							
Council:	Salisbury	D	4/19/1999																							
Consistory:	Baltimore	C	5/1/1999																							
Valley	Informational Fields	Displays the Valley where the Member was invested with the level																								
Status	Informational Fields	Displays the member status code for the level																								
Effective Beginning On	Informational Fields	Displays the effective date for the level																								

Table 58: Sentinel Request Statistical Change Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description																				
Proposed Membership Status Information																						
<div style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;">Proposed Membership Status for Member</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Level</th> <th style="width: 20%;">Valley</th> <th style="width: 20%;">Status</th> <th style="width: 20%;">Effective Beginning On</th> </tr> </thead> <tbody> <tr> <td>Lodge:</td> <td><input type="text" value="Salisbury"/></td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> </tr> <tr> <td>Chapter:</td> <td><input type="text" value="Salisbury"/></td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> </tr> <tr> <td>Council:</td> <td><input type="text" value="Salisbury"/></td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> </tr> <tr> <td>Consistory:</td> <td><input type="text" value="Baltimore"/></td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> </tr> </tbody> </table> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Optional note explaining this request</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div> </div> <p style="text-align: center; margin-top: 10px;"><input type="button" value="Save this Request"/></p> </div>			Level	Valley	Status	Effective Beginning On	Lodge:	<input type="text" value="Salisbury"/>	<input type="text" value=""/>	<input type="text" value=""/>	Chapter:	<input type="text" value="Salisbury"/>	<input type="text" value=""/>	<input type="text" value=""/>	Council:	<input type="text" value="Salisbury"/>	<input type="text" value=""/>	<input type="text" value=""/>	Consistory:	<input type="text" value="Baltimore"/>	<input type="text" value=""/>	<input type="text" value=""/>
Level	Valley	Status	Effective Beginning On																			
Lodge:	<input type="text" value="Salisbury"/>	<input type="text" value=""/>	<input type="text" value=""/>																			
Chapter:	<input type="text" value="Salisbury"/>	<input type="text" value=""/>	<input type="text" value=""/>																			
Council:	<input type="text" value="Salisbury"/>	<input type="text" value=""/>	<input type="text" value=""/>																			
Consistory:	<input type="text" value="Baltimore"/>	<input type="text" value=""/>	<input type="text" value=""/>																			
Valley	Informational Field	Displays the Valley where the Member was invested with the level																				
Status	Optional Field	Select the status code you wish to request to change																				
Effective Beginning On	Optional Field	Enter the desired effective date for the change																				
Optional note explaining this request	Optional Field	Enter a brief explanation of the reason that the change was request and any other pertinent information																				
Save This Request button	Action Button	Use this button to save a new record or changes to an existing record																				

12.1.4 Find a Valley

This dialog box only appears on the Expert version of the Profile tab of the [People Search](#) screen. Clicking on a ? button next to the first box for a level in the Expert section opens the dialog box.

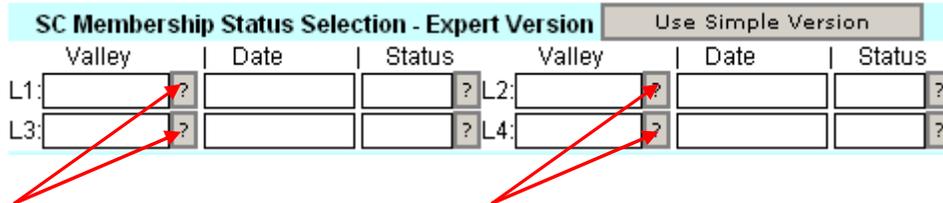


Figure 78: People Search Screen - Profile Search - Expert Version

The dialog box displays a list of Valley names, along with the Orient for each Valley. Clicking the **Select** button enters the information into the appropriate field for the search.

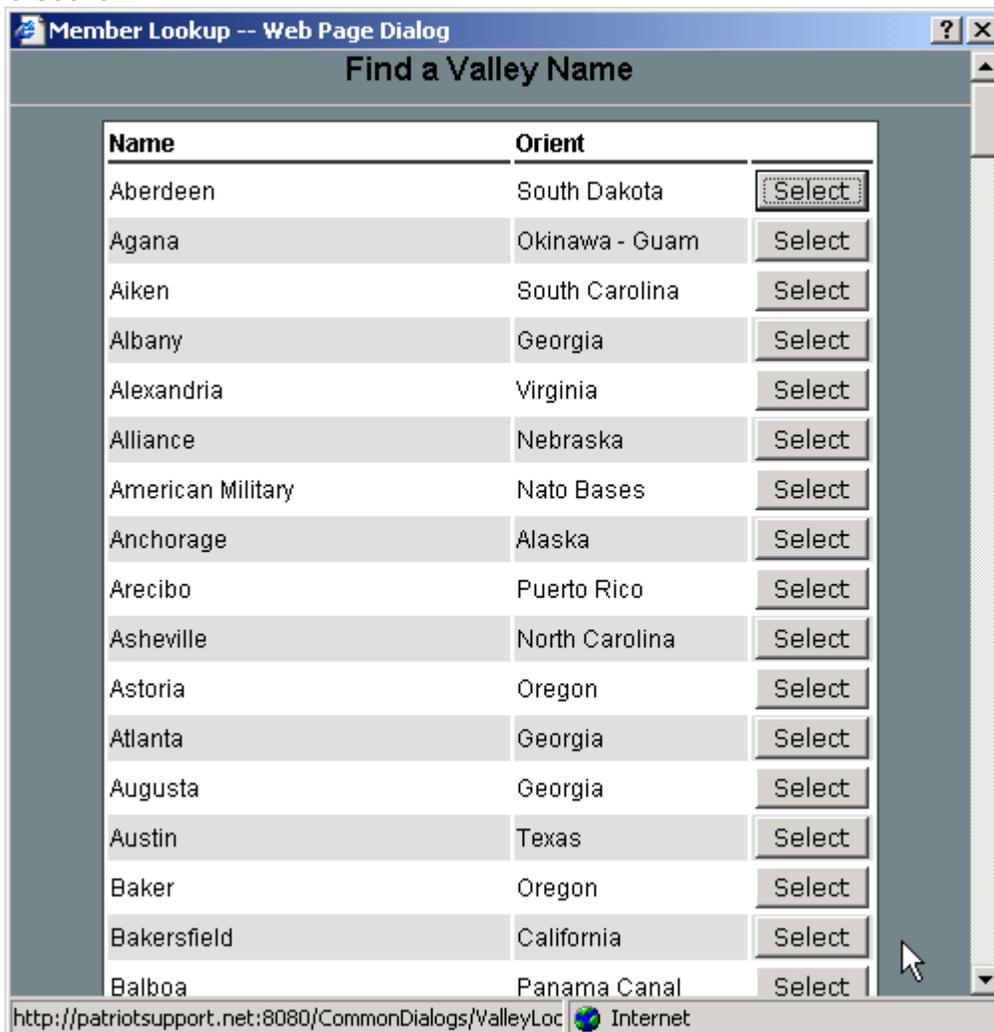


Figure 79: Find a Valley Dialog Box

12.1.5 Dues Details

Access this function by clicking on the **Show Yearly Dues Details** button on the [Other Member Info](#) screen.

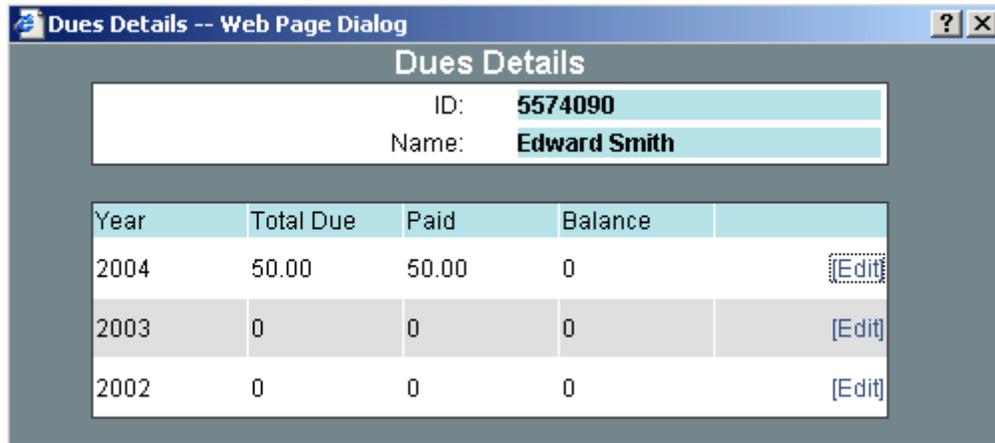


Figure 80: Sentinel Dues Details Dialog Box

A year-by-year record of dues information available in Sentinel displays in the dialog box.

Table 59: Sentinel Request Statistical Change Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Total Due	Optional Field	Records the total amount due for the year indicated
Paid	Optional Field	Records the total amount paid for the year indicated
Balance	Optional Field	Records the balance due for the year indicated
[Edit]	Action Link	Click on the link in the appropriate row to edit the record

13 Reports

13.1 Saving/Downloading Reports

No matter which report you are saving, the process is the same. When you have run the report and elected to save it (rather than open it for immediate viewing), Sentinel/Windows opens a series of dialog boxes to lead you through the process.

The first step is to choose whether to view or save (download) the file. Windows opens a File Download dialog box. To save the file, click the **Save** button. To view the file, click the **Open** button. If you do not wish to proceed, click the **Cancel** button.

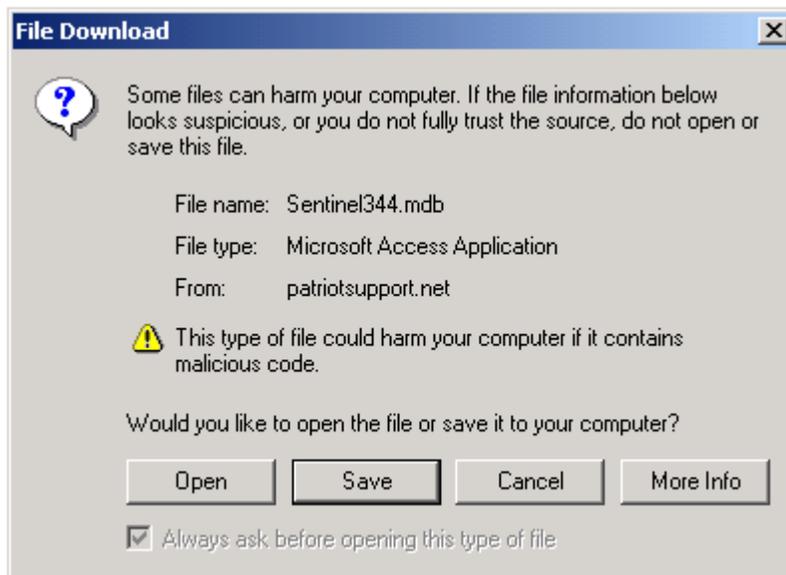


Figure 81: File Download Dialog Box

If you choose to view the file, then Adobe Reader opens automatically and displays the file. If you decide that you would like to save the file, then click on the **Save** icon  in Adobe Reader and follow the Save procedure.

If you prefer to download the file and click the **Save** button, then the **Save As** dialog box opens. Navigate to the place where you wish to save the file. Enter the name of the file in the **File name** drop-down box, and make sure that the **Save as type** drop-down box shows the correct file type.

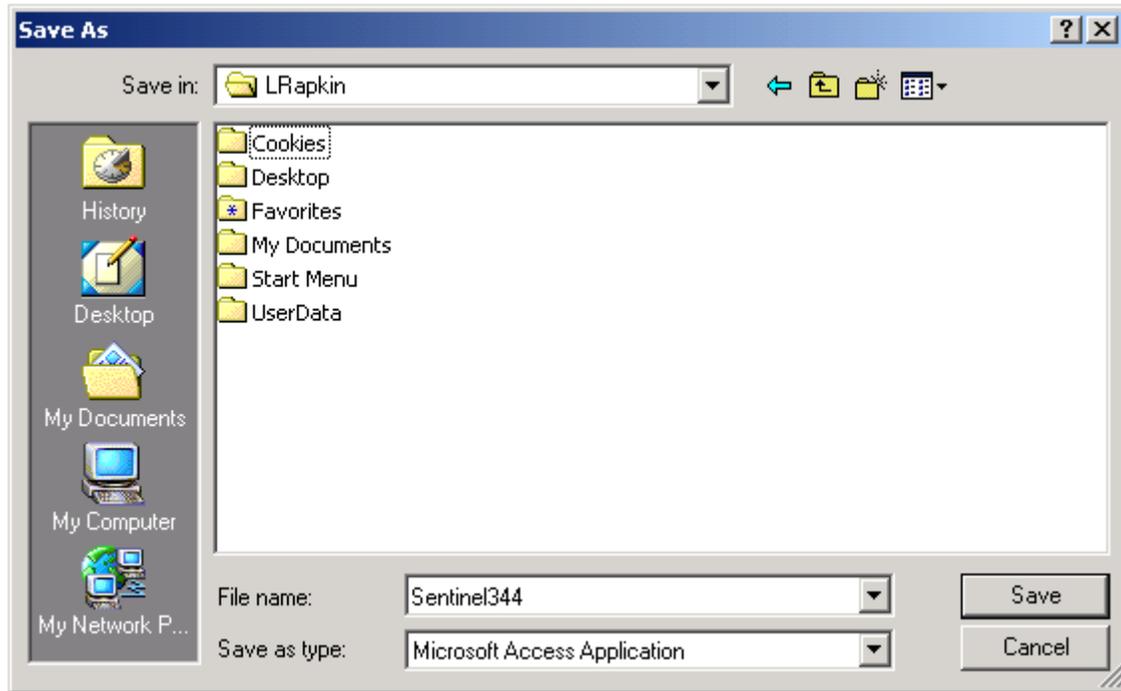


Figure 82: Save As Dialog Box

To complete the process, click the **Save** button. To abort the process, click the **Cancel** button.

13.2 Output Formats

13.2.1 Crystal Reports (Crystal HTML Viewer Document)

Crystal Reports works behind-the-scenes to format information for printable reports. The displayed report is read-only, but may be printed.

13.2.2 PDF

PDF is a read-only format. You can view or save a PDF file from Sentinel. However, you must have an Adobe program (Reader, Acrobat, etc.) installed in order to view the file. [Adobe Reader](http://www.adobe.com/products/acrobat/readstep2.html) may be downloaded for free at the following website: (<http://www.adobe.com/products/acrobat/readstep2.html>).

13.2.3 MS Word

MS Word files are read/write, provided you have MS Word installed on your PC. You can view or save an MS Word file from Sentinel.

13.2.4 MS Excel

MS Excel files are read/write, provided you have MS Excel installed on your PC. You can view or save an MS Excel file from Sentinel.

13.3 Blue Lodge Information Listing

13.3.1 Generating the Report

Access the report from the [Search Member Profiles – Search Results](#) screen. After you have completed a search, click the Reports button. Select the Blue Lodge Information Listing report by clicking on it. Then, click the **Next** button.

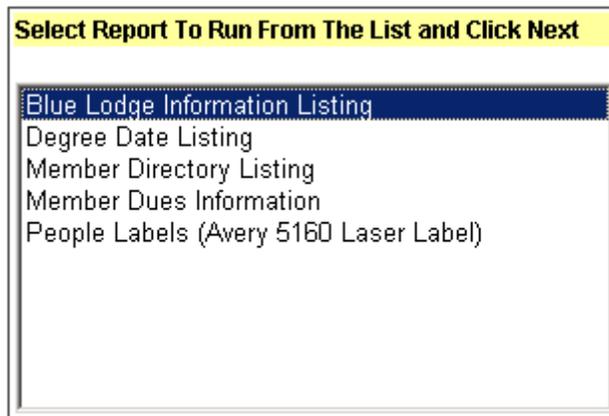


Figure 83: Select the Blue Lodge Report

13.3.2 Report Parameters

Select the format for the report output using the drop-down box, and click the **Next** button to generate the report.

The screenshot shows a web application interface with a navigation bar at the top containing the following items: Members, Dues, Officers/Volunteers, Valley, Data Offloading, Admin, and Logout. The main content area features a form titled "Report: Blue Lodge Information Listing". Below this title is a sub-section titled "Select Parameters for this Report". This section contains four rows of parameters, each with a label and a drop-down menu:

Report: Blue Lodge Information Listing	
Select Parameters for this Report	
Output my report formatted as:	Crystal HTML Viewer Document
First Sort Order	Alpha by Name
Second Sort Order	Lodge City
Third Sort Order	Lodge State

At the bottom of the form, there are two buttons: "< Back" and "Next >".

Figure 84: Blue Lodge Report Parameters

13.3.3 Report Content

- ❖ Member ID Number
- ❖ Preferred Name
- ❖ Lodge Name/Number
- ❖ Lodge City/State

13.4 Degree Date Listing

13.4.1 Generating the Report

Access the report from the [Search Member Profiles – Search Results](#) screen. After you have completed a search, click the Reports button. Select the Degree Date Listing report by clicking on it. Then, click the **Next** button.

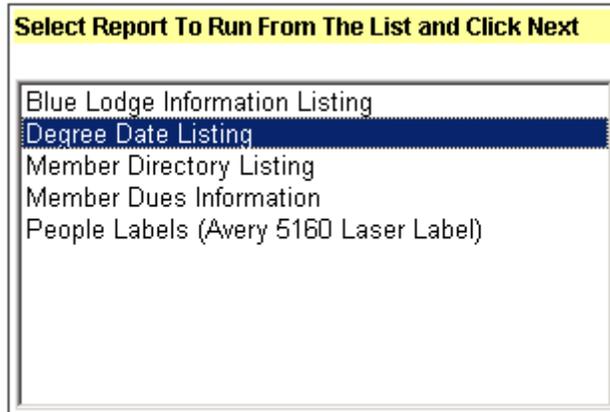


Figure 85: Select the Degree Date Listing Report

13.4.2 Report Parameters

Select the format for the report output and the sort criteria using the drop-down boxes, and click the **Next** button to generate the report.

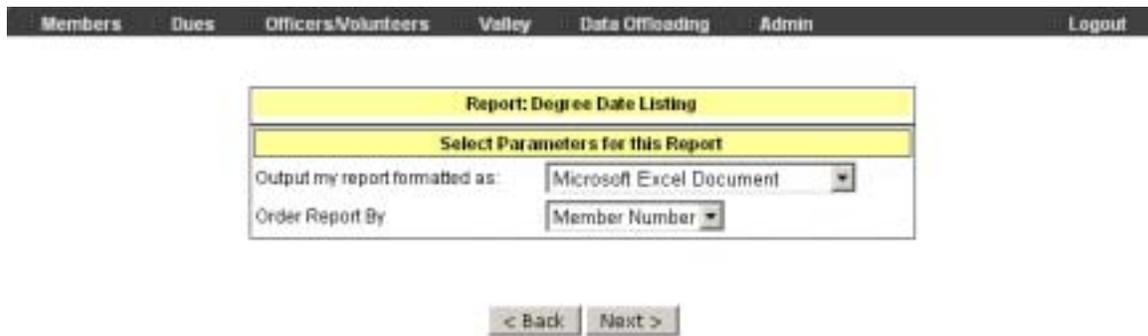


Figure 86: Degree Date Report Parameters

13.4.3 Report Content

- ❖ Person ID
- ❖ Name
- ❖ 14° (Date)
- ❖ 18° (Date)
- ❖ 30° (Date)
- ❖ 32° (Date)
- ❖ 33° (Date)
- ❖ KCCH (Date)
- ❖ GC (Date)

13.5 Member Directory Listing

13.5.1 Generating the Report

Access the report from the [Search Member Profiles – Search Results](#) screen. After you have completed a search, click the Reports button. Select Member Directory Listing report by clicking on it. Then, click the **Next** button.

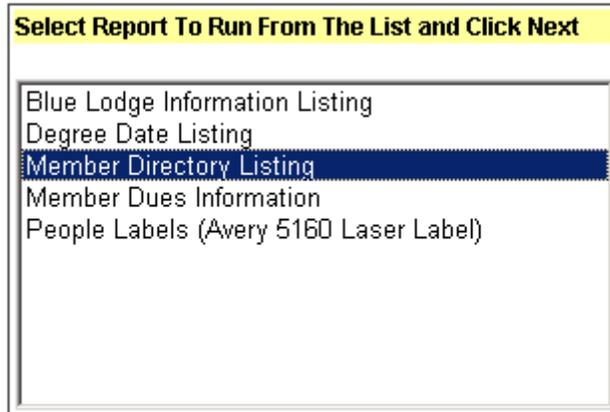


Figure 87: Select the Member Directory Report

13.5.2 Report Parameters

Select the format for the report output and the sort criteria using the drop-down boxes, and click the **Next** button to generate the report.

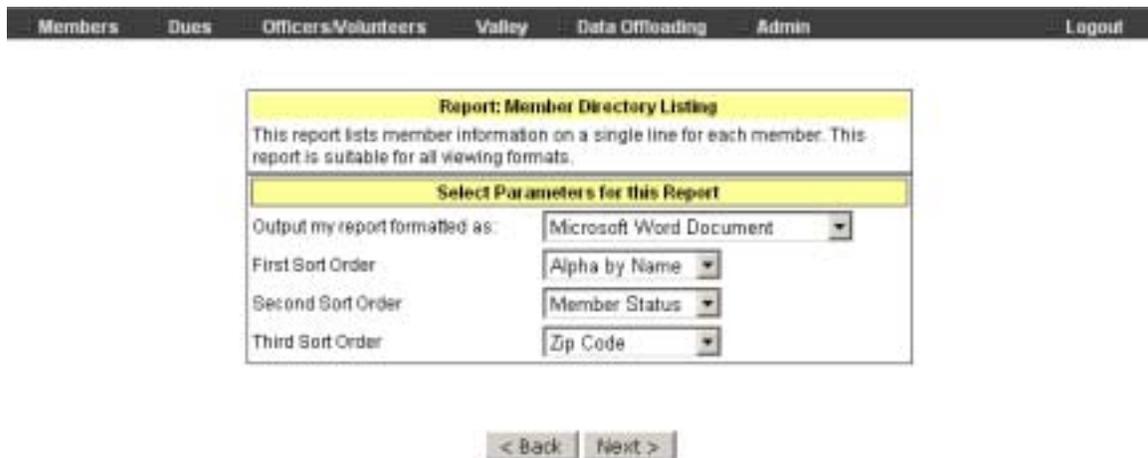


Figure 88: Member Directory Listing Report Parameters

13.5.3 Report Content

- ❖ Member Name
- ❖ Member Status
- ❖ Preferred Address
- ❖ Home Phone #
- ❖ Work Phone #
- ❖ Cell Phone #
- ❖ Email Address (Preferred Email)

13.6 Member Dues Information Report

13.6.1 Generating the Report

Access the report from the [Search Member Profiles – Search Results](#) screen. After you have completed a search, click the Reports button. Select the Member Dues Information report by clicking on it. Then, click the **Next** button.

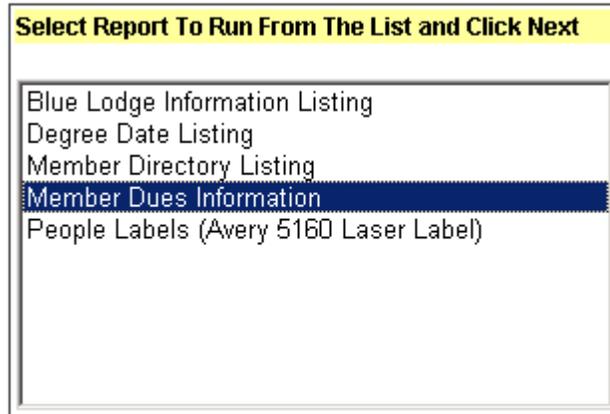


Figure 89: Select the Member Dues Report

13.6.2 Report Parameters

Select the format for the report output using the drop-down box, and click the **Next** button to generate the report.



Figure 90: Member Dues Information Report Parameters

13.6.3 Report Content

- ❖ Member ID #
- ❖ Member Name
- ❖ Current Dues Year
- ❖ Current Dues Code
- ❖ Current Statement Code
- ❖ Current Balance
- ❖ Past Due Balance
- ❖ Current Year Total Paid
- ❖ Total Balance

13.7 People Labels

13.7.1 Generating the Report

Access the report from the [Search Member Profiles – Search Results](#) screen. After you have completed a search, click the Reports button. Select the People Labels report by clicking on it. Then, click the **Next** button.

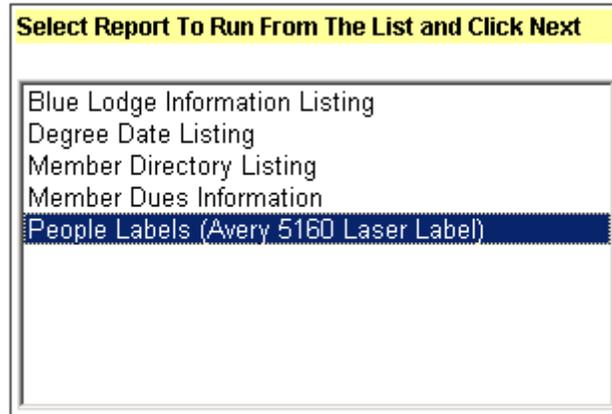


Figure 91: Select the People Labels Report

13.7.2 Report Parameters

Select the format for the report output and the sort criteria using the drop-down boxes, and click the **Next** button to generate the report.

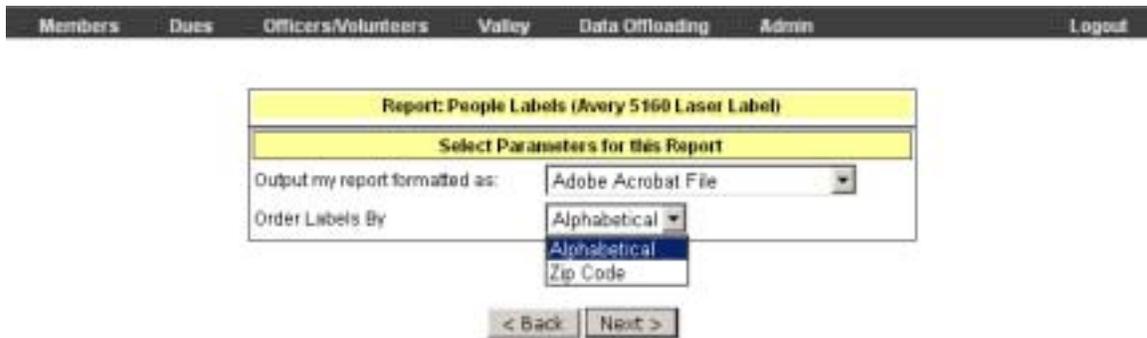


Figure 92: People Labels Report Parameters

NOTE: For large mailings, a ZIP code sort is preferred, but not required, by the U. S. Postal Service for ease of processing.

13.7.3 Report Content

- ❖ Name
- ❖ Member Number (if applicable)
- ❖ Address
- ❖ City/State/ZIP

13.7.4 Printing Labels

Sentinel automatically formats this report for Avery 5160 labels. An MS Word file formats the labels for easy printing. Load the blank label sheets into the printer according to the printer manufacturer's instructions, or hand-feed the blank labels if the printer allows.

NOTE: The correct way to hand-feed or insert a sheet of blank labels into a printer varies according to manufacturer and model. If you are unsure how to do this, check the printer's user manual for instructions.

13.8 Dues Payment Processing Report

13.8.1 Generating the Report

Access the report from the [Search Dues Payments](#) screen. After you have completed a search, click the Reports button on the [Search Dues Payments Results](#) screen. Select the Dues Payment Processing report by clicking on it. Then, click the **Next** button.



Figure 93: Select Dues Payment Processing Report

13.8.2 Report Parameters

Select the format for the report output, the level of detail (Detail/Summary) and the sort criteria using the drop-down boxes, and click the **Next** button to generate the report.

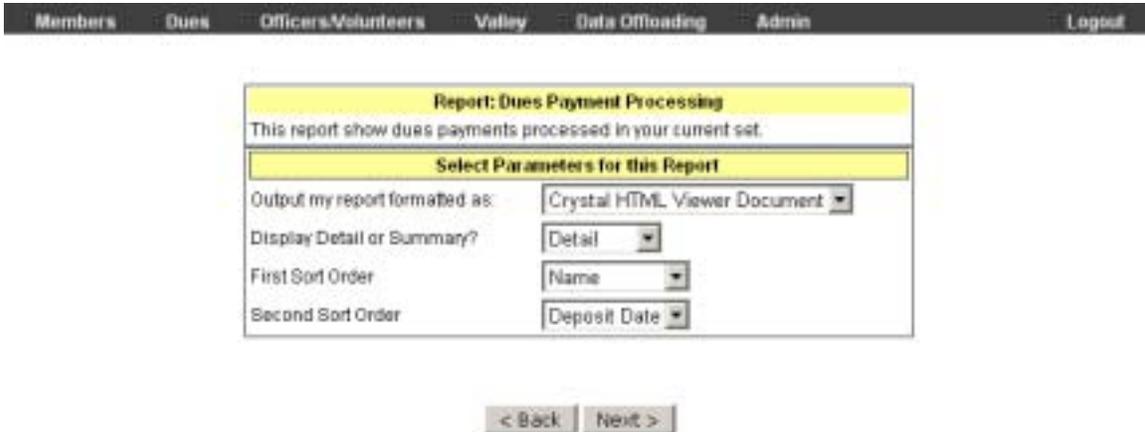


Figure 94: Dues Payment Processing Report Parameters

13.8.3 Report Content

13.8.3.1 Summary

- ❖ Member Name
- ❖ Member ID
- ❖ Deposit Date
- ❖ Check/CC Number
- ❖ Dues Amount
- ❖ Check Total
- ❖ Subtotals
 - ❖ Subtotal of each of the three fund contributions (Boxes 1,2 and 3)
 - ❖ Subtotal of dues payments applied to previous years
 - ❖ Subtotal of dues applied to current year
 - ❖ Subtotal of unearned dues (Dues collected for an ensuing year or years)

13.8.3.2 Detail

- ❖ Member Name
- ❖ Member ID
- ❖ Deposit Date
- ❖ Check/CC Number
- ❖ Payment Amount
- ❖ Dues applied to year XXXX
- ❖ Subtotals
 - ❖ Subtotal of each of the three fund contributions (Boxes 1,2 and 3)
 - ❖ Subtotal of dues payments applied to previous years
 - ❖ Subtotal of dues applied to current year
 - ❖ Subtotal of unearned dues (Dues collected for an ensuing year or years)

14 Data Extracts

Data extracts are customizable reports based on searches. You must perform a search in order to create a data extract. Data extracts function identically, no matter the source of the data. The People Profile Search data extract example is used throughout the manual.

14.1 Creating a Data Extract

14.1.1 Access Data Extract Function

Data extracts are accessed by clicking the **Reports** button on any Search Results page. When the list of reports appears, select **Extract a dataset** and click the **Next** button. This action sends you to the [Select a Dataset](#) screen.

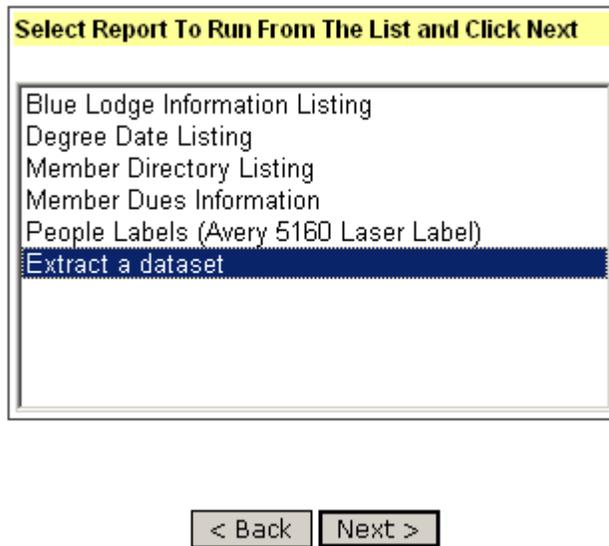


Figure 95: Extract a Dataset

Table 60: Sentinel Report Selection Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Next Button	Action Button	Moves you to Select a Dataset screen
Back Button	Action Button	Returns you to Search screen

14.1.2 Select a Dataset

Available choices vary according to the type of search you have performed. Select a dataset from the list of choices by clicking on it with the mouse, and click the **Next** button. This action sends you to the [Select Fields for Extract](#) screen.

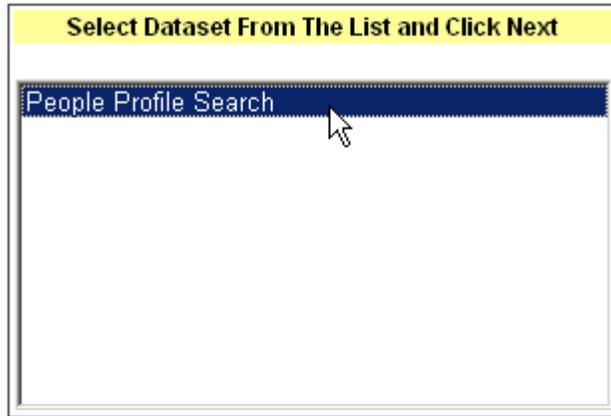


Figure 96: Select a Dataset

Table 61: Sentinel Dataset Selection Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Next Button	Action Button	Moves you to Select Fields for Extract screen
Back Button	Action Button	Returns you to Report Selection screen

14.1.3 Select Fields for Extract

When you create a data extract, you are pulling information directly out of the Sentinel database tables. Therefore, the available data items that you see in the list may not always be identical to the field labels that you see on a search screen. Also, the available data items will be in alphabetical order, rather than the order that you see on the screen.



Figure 97: Select Fields for Extract

When you have completed your selection, click the **Next** button. This sends you to the [Select a Format](#) screen.

Table 62: Sentinel Select Fields for Extract Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Check All Files	Selection Checkbox	Click inside the box to select all available fields. There may be several dozen fields, so this may take a few minutes.
Selected	Selection Checkbox	Use these checkboxes to select individual data items
Next Button	Action Button	Moves you to Select a Format screen
Back Button	Action Button	Returns you to Select a Dataset screen

14.1.4 Select Format for Extract

14.1.4.1 Output Formats

Output format options are:

- ❖ MS Word
- ❖ MS Excel

All output files are read/write, provided you have MS Word/MS Excel installed on your PC.

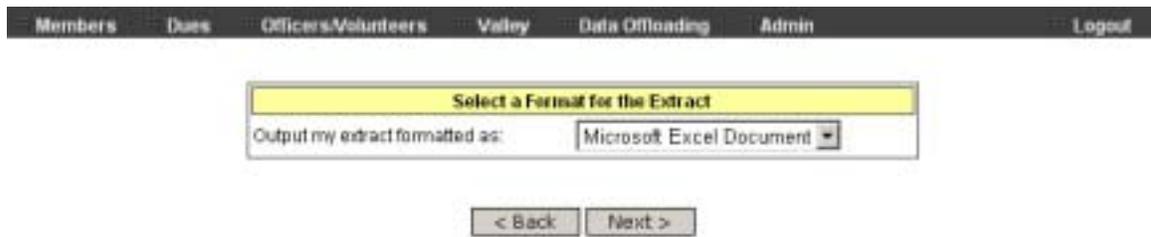


Figure 98: Select an Output Format

After you have selected the format for the data extract, click the **Next** button. This will begin the [save/download procedure](#).

Table 63: Sentinel Select Fields for Extract Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Output my extract formatted as:	Selection Drop-down Box	Choose MS Word for a text document or MS Excel for a spreadsheet.
Next Button	Action Button	Begins the save procedure
Back Button	Action Button	Returns you to Select Fields for Extract screen

14.2 Saving/Downloading Data Extracts

No matter which data extract you are saving, the process is the same. When you have completed the dataset, field, and format selection process, Windows opens a series of dialog boxes to lead you through the process.

Windows opens a File Download dialog box. To save the file, click the **Save** button. To view the file, click the **Open** button. If you do not wish to proceed, click the **Cancel** button.

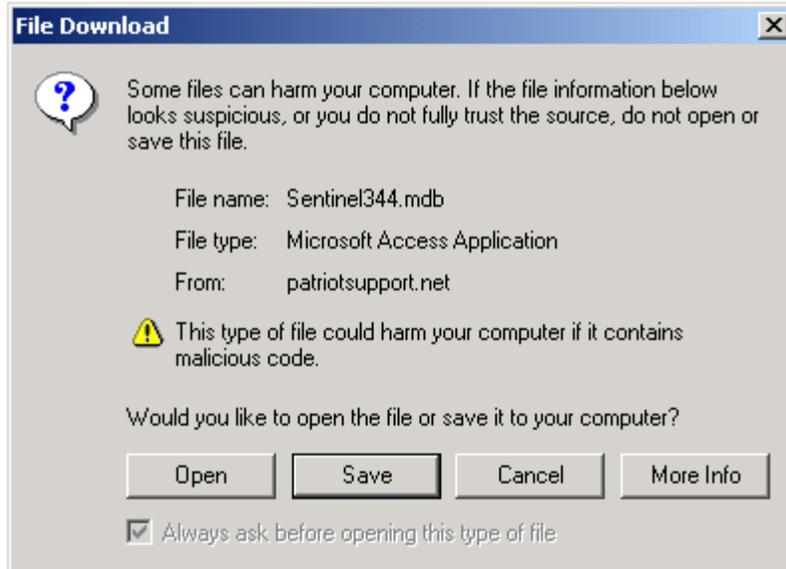


Figure 99: File Download Dialog Box

If you choose to view the file, then the appropriate program opens automatically and displays the file. If you decide that you would like to save the file, then click on the **Save** icon  and follow the Save procedure.

If you prefer to download the file and click the **Save** button, then the **Save As** dialog box opens. Navigate to the place where you wish to save the file. Enter the name of the file in the **File name** drop-down box, and make sure that the **Save as type** drop-down box shows the correct file type.

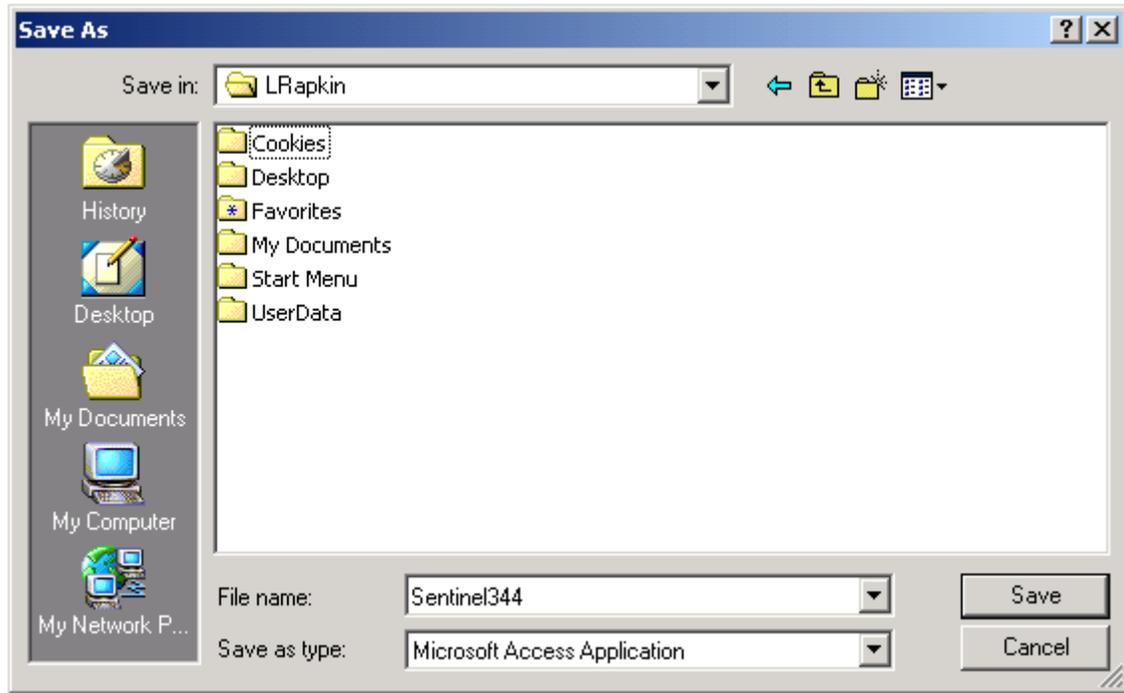


Figure 100: Save As Dialog Box

To complete the process, click the **Save** button. To abort the process, click the **Cancel** button.

14.2.1 The Final Product

After you have completed the [save procedure](#), you can open your data extract using the program appropriate to the file format.

	A	B	C	D	E	F	G	H	I
	CalculatedSCERDate	CalculatedSCStatus	InitiationDate	KCCHDate	LastModBy	LastModOn	LevelIDDate	LevelIDStatusCode	LevelIDStatusDesc
1									
2		Active	10/5/1979 0:00		Conversion	11/4/2003 0:00		D	D
3		Active	11/13/1976 0:00		Conversion	11/4/2003 0:00		D	D
4		Active	10/13/1965 0:00	10/17/1977 0:00	Conversion	11/4/2003 0:00		B	B
5		Active	3/5/1977 0:00		Conversion	11/4/2003 0:00		D	D
6		Active	4/15/1973 0:00		Conversion	11/4/2003 0:00		D	D
7		Active	11/13/1961 0:00		Conversion	11/4/2003 0:00		B	B
8		Active	3/20/1974 0:00		Conversion	11/4/2003 0:00		D	D
9		Active	4/11/1966 0:00		Conversion	11/4/2003 0:00		B	B
10		Active	11/10/1973 0:00		Conversion	11/4/2003 0:00		D	D
11		Active	10/13/1965 0:00		Conversion	11/4/2003 0:00		B	B
12		Active	3/4/1971 0:00		Conversion	11/4/2003 0:00		D	D
13		Active	11/18/1963 0:00		Conversion	11/4/2003 0:00		B	B
14		Active	11/10/1973 0:00	10/21/1991 0:00	Conversion	11/4/2003 0:00		D	D
15		Active	9/26/1963 0:00		Conversion	11/4/2003 0:00		B	B
16		Active	11/17/1952 0:00		Conversion	11/4/2003 0:00		B	B
17		Active	10/5/1983 0:00		Conversion	11/4/2003 0:00		D	D
18		Active	3/1/1989 0:00		Conversion	11/4/2003 0:00		D	D
19		Active	3/1/1989 0:00		Conversion	11/4/2003 0:00		D	D
20	12/1/2002 0:00	Inactive	9/27/1991 0:00		Conversion	11/4/2003 0:00	12/1/2002 0:00	J	J
21	3/12/1993 0:00	Active	3/21/1973 0:00	10/3/2001 0:00	Conversion	11/4/2003 0:00	3/12/1993 0:00	N	N
22	11/6/1993 0:00	Active	11/5/1993 0:00		Conversion	11/4/2003 0:00	11/5/1993 0:00	D	D
23	11/6/1993 0:00	Active	11/5/1993 0:00		Conversion	11/4/2003 0:00	11/5/1993 0:00	D	D
24	4/27/1996 0:00	Active	4/27/1996 0:00		Conversion	11/4/2003 0:00	4/27/1996 0:00	D	D
25	9/27/1987 0:00	Active	9/20/1987 0:00		Conversion	11/4/2003 0:00	9/20/1987 0:00	D	D
26	10/23/1999 0:00	Active	10/23/1999 0:00		Conversion	11/4/2003 0:00	10/23/1999 0:00	D	D
27		Active	4/5/1981 0:00		Conversion	11/4/2003 0:00		D	D
28		Active	10/5/1979 0:00		Conversion	11/4/2003 0:00		D	D
29	11/13/2002 0:00	Deceased	11/13/1976 0:00		Conversion	11/4/2003 0:00	11/13/2002 0:00	O	O
30		Active	9/27/1967 0:00		Conversion	11/4/2003 0:00		B	B
31		Active	3/5/1988 0:00		Conversion	11/4/2003 0:00		B	B
32	10/5/2002 0:00	Deceased	3/21/1973 0:00		Conversion	11/4/2003 0:00	10/5/2002 0:00	O	O
33		Active	4/18/1978 0:00		Conversion	11/4/2003 0:00		D	D
34		Active	11/13/1976 0:00		Conversion	11/4/2003 0:00		D	D

Figure 101: Data Extract Displayed in MS Excel

15 Administrative Users

15.1 Data Updates

There are three classes of data flow between Sentinel and Patriot. Each flow is described below, along with general rules for how updates are applied:

15.1.1 Data Entry in Sentinel That Updates Non-Sensitive Patriot Data

Non-sensitive data is data that pertains to the dues system. Data changes pertaining to the dues system automatically update the dues records for the corresponding Member in Patriot automatically, and is not reviewed.

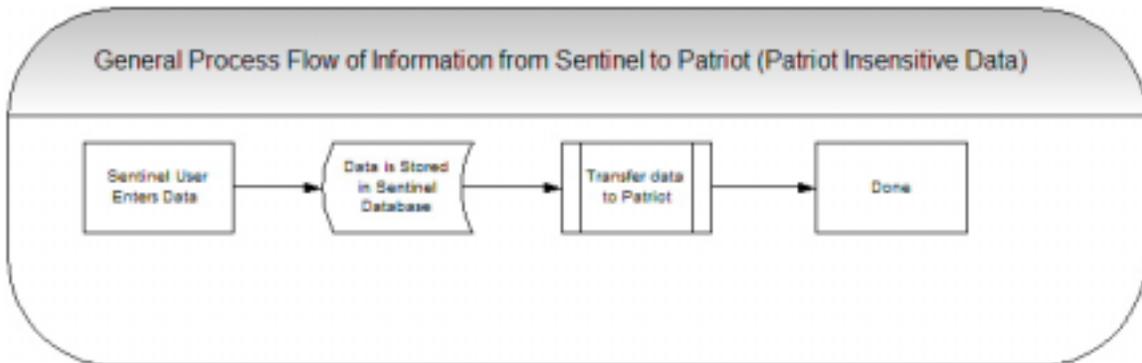


Figure 102: Flow of Non-Sensitive Information from Sentinel to Patriot

15.1.2 Data Entry in Sentinel That Updates Sensitive Patriot Data

Sensitive data refers to address updates, names changes, officer changes, and Member statistical changes. In these scenarios, the data does not automatically update Patriot, but is queued for review by Patriot users. This review process in Patriot ends with a message sent to the Valley through the [Sentinel Notification System](#).

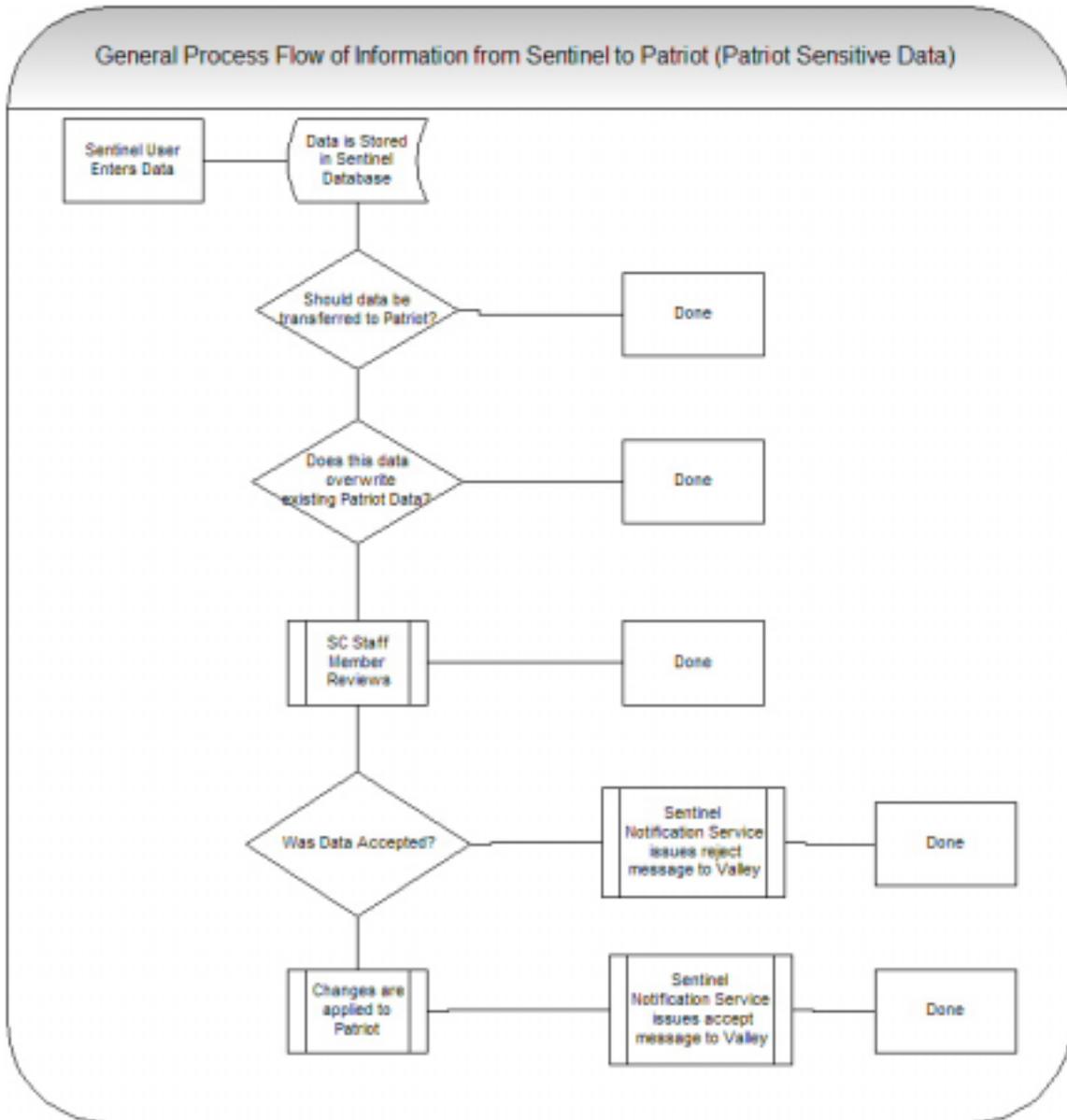


Figure 103: Flow of Sensitive Information from Sentinel to Patriot

15.1.3 Data Entry in Patriot That Updates Sentinel

Data entered in Patriot always overrides the Sentinel data. When this occurs, the Valley receives notification of the change through the [Sentinel Notification System](#).

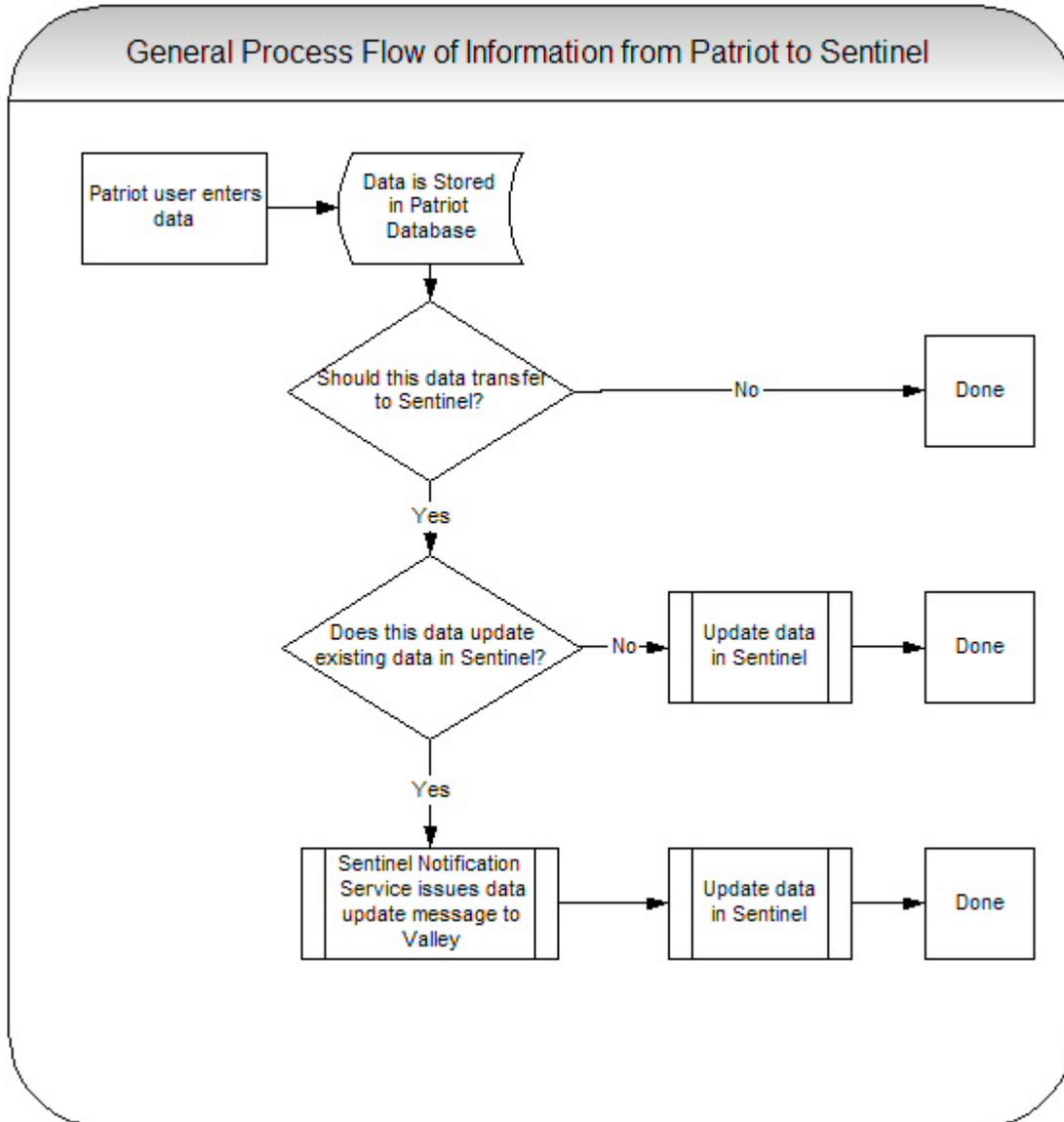


Figure 104: Flow of Information from Patriot to Sentinel

15.2 System Security

All communication between the Sentinel application server and the client PC is encrypted by 128-bit Secure Socket Layers. This encryption level is the current industry standard for data-communication encryption over the Internet.

15.3 Valley Administrators

A Valley Administrator accesses all areas with complete edit capability, and has authority and complete control to maintain accounts for other users within the Valley (with the exception of the Valley Administrator account itself). This section describes additional screens and functions available to Valley Administrators

15.4 Dual/Plural Member Records

Sentinel maintains records for each Valley associated with a dual/plural Member, while Patriot maintains a single record for the dual/plural Member. This gives the Supreme Council one set of name/address/phone and degree date information for a Member, while giving each Valley discretion in viewing and maintaining its own Member record.

When a Valley wishes to change a Member's address, the change is ultimately approved or disapproved by a Supreme Council staff member. If the change is approved, all Sentinel addresses for other Valleys sharing that Member are notified via the [Sentinel Notification System](#) and updated. If not approved, address changes are not applied to the primary address in Patriot, and other Valleys do not receive the change. However, the Valley that made the original change still shows the Member's new address in Sentinel, and is notified via the Sentinel Notification System that the address in Sentinel is out of sync with the Patriot system. The Supreme Council can always override a Valley by processing an address change in Patriot. All Valleys associated with the Member are notified via the Sentinel Notification System that a new address change has been processed and applied to the existing Sentinel address.

15.5 Select a Valley Screen

Your permissions may allow you to work with more than one Valley's data. Therefore, it is necessary for you to select a Valley before proceeding with work. The Select a Valley screen is where that selection is made.

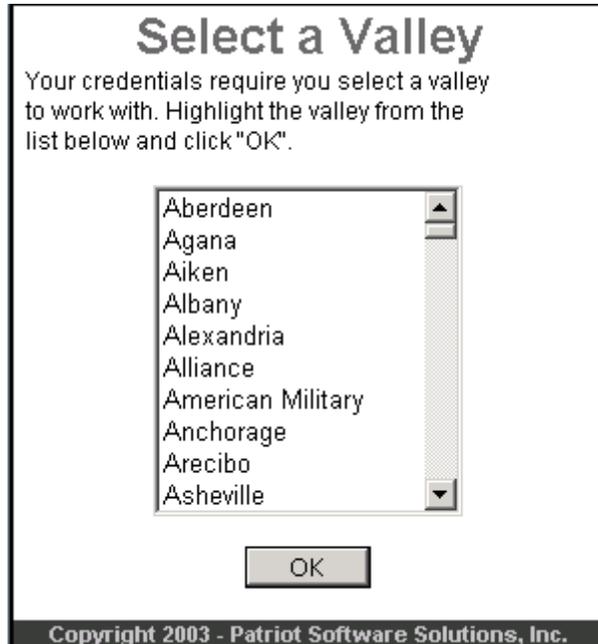


Figure 105: Sentinel Select a Valley Screen

Select the Valley by highlighting it with the mouse and clicking **OK**. If you wish to change Valleys without having to log out and log in again, go to the Admin menu and click on the **Select Different Valley** menu option. The Select a Valley screen opens.

15.6 Admin Menu Functions

NOTE: The Admin Menu is not available to all users; access is based on user account type.

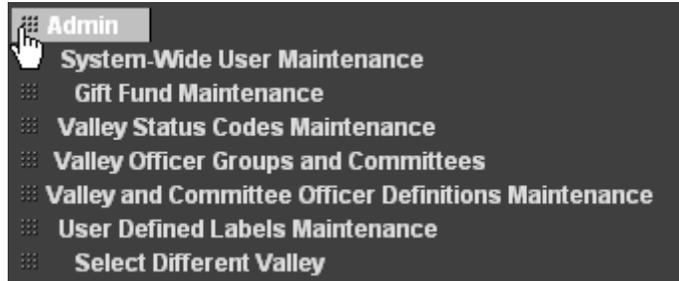


Figure 106: Sentinel Admin Menu (All Options Displayed)

15.6.1 User Maintenance

The screenshot shows a web interface for 'System-Wide User Maintenance'. At the top right is an 'Add' button. Below it is a table with the following data:

Login Name	Valley Name	Orient Name	Permission
alovas		Georgia	Valley Administrator
cedic	Omaha		Valley Administrator
dalban			Valley Administrator
dhawthome	Wichita		Valley Administrator
gframe		West Virginia	Valley Administrator
jkahn	Washington		Valley Administrator
jmarshall	Baltimore	Maryland	Valley Administrator
jrobinette	Cumberland		Valley Administrator
lhazelg	Baltimore		Valley Administrator
lrapkin			Valley Administrator

At the bottom of the table area, there is a page number '12'.

Figure 107: Sentinel User Maintenance Screen

This screen is used to select an account to modify. All of the user accounts that can be managed are displayed in the results table. To edit the user account, click any one of the links.

Table 64: Sentinel User Maintenance Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Add Button	Action Button	Click this button to create a new user account
Login Name Link	Hyperlink	Click on the link to edit the user account

Field/Button Name	Field/Button Information	Field/Button Description
Valley Name Link	Hyperlink	Click on the link to edit the user account
Orient Name Link	Hyperlink	Click on the link to edit the user account
Permission Link	Hyperlink	Click on the link to edit the user account

15.6.2 Edit User Account

Login Name:
 NEW Password:
 NEW Password Confirmation:
 Full Name (First and Last):
 Email:
 Valley:
 Orient:
 User Role:

Last modified by on 12:00:00 AM

Figure 108: Sentinel Edit User Account Screen

This screen is used to create, delete, or edit user accounts. You can also use the screen to

- ❖ Reset passwords,
- ❖ Set permissions,
- ❖ Update email accounts.

Table 65: Sentinel Edit User Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Login Name	Required Field	Records the username
NEW Password	Optional Field*	Sets the user's password
NEW Password Confirmation	Optional Field*	Confirms the user's password
Full Name	Required Field	Records the user's full name
Email	Optional Field	Records the user's email address
Valley	Optional Field	Records the user's Valley
Orient	Optional Field	Records the user's Orient
User Role	Required Field	Records the user's Role

* This field is required when a new user account is created. When the user account is maintained, the field is optional; you do not need to reset the password every time you edit the user account.

15.6.3 Gift Fund Maintenance

Gift Funds Maintenance					
Fund Code	Fund	Line 1 Msg (30 chars max)	Line 2 Msg (30 chars max)	Number in Use	
ALMONER	Almoner's Fund2	Almoner's Fund Line 1	Almoner's Fund Line	0	[Edit] [Delete]
TEST	Test Fund 1			2	[Edit] [Delete]
TEST2	Test Fund 2			2	[Edit] [Delete]
TEST3	Test Fund 3			1	[Edit] [Delete]
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		[Add]
1					

Figure 109: Sentinel Gift Fund Maintenance Screen

This screen is used to add, delete, and modify gift fund records. The [table column headings](#) are links that can be used to sort the records alphabetically.

Gift Funds Maintenance					
Fund Code	Fund	Line 1 Msg (30 chars max)	Line 2 Msg (30 chars max)	Number in Use	
ALMONER	Almoner's Fund2	Almoner's Fund Line 1	Almoner's Fund Line	0	[Edit] [Delete]
TEST	Test Fund 1			2	[Edit] [Delete]
TEST2	Test Fund 2			2	[Edit] [Delete]
<input type="text" value="TEST3"/>	<input type="text" value="Widow & Orphans"/>	<input type="text" value="Widows & Orphans"/>	<input type="text" value="Gift Fund"/>		[Save] [Cancel]
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		[Add]
1					

Figure 110: Sentinel Gift Fund Maintenance Screen – Edit Mode

The screen refreshes when you change to edit mode, and you are able to edit the Fund Name and both lines of the message. Sentinel automatically audits changes to the fund record by recording the username and the date of each modification.

Gift fund information appears on dues notices, is used to generate reports, and is parsed for financial information.

Table 66: Sentinel Gift Fund Maintenance Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Fund Code	Required Field	Records the Fund Code
Fund Name	Required Field	The Fund Name is used to populate the Dues Notices Fund drop-down boxes on the Maintain Valley Details screen. Enter the fund name exactly as you wish it to appear on the screen.

Field/Button Name	Field/Button Information	Field/Button Description
Line 1	Required Field	Records the first line of information about the fund
Line 2	Required Field	Records the second line of information about the fund

15.6.4 Valley Status Code Maintenance

Valley Status Code Maintenance

Valley Status Code	Valley Status Description	Number in Use	
CANDIDATE	Candidate	18	[Edit] [Delete]
MEM	Member	1	[Edit] [Delete]
NONMEM	Non-Member	0	[Edit] [Delete]
SPOUSE	Spouse	0	[Edit] [Delete]
Vendor	Vendor/Svc. Provider	0	[Edit] [Delete]
<input type="text"/>	<input type="text"/>		[Add]

1

Figure 111: Sentinel Valley Status Code Maintenance Screen

This screen is used to define the categories that are used to classify [People](#) records. You can also see the number of People records in each category.

You may delete the entire record by clicking on the Delete action link. Please note that only status codes with a count of zero may be deleted.

Table 67: Sentinel Valley Status Code Maintenance Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Valley Status Code	Required Field	Records the Valley Status Code
Valley Status Description	Required Field	Enter the Valley Status description exactly as you wish it to appear on the screen.

15.6.5 Valley Officer Groups and Committees

Group Name	Required By System?	Number in Use	
Brick Committee	No	0	[Edit] [Delete]
Chapter	Yes	5	[Edit] [Delete]
Consistory	Yes	2	[Edit] [Delete]
Council	Yes	1	[Edit] [Delete]
Lodge	Yes	4	[Edit] [Delete]
Mortar Committee	No	0	[Edit] [Delete]
Other	Yes	0	[Edit] [Delete]
<input type="text"/>	No		[Add]
1			

Figure 112: Sentinel Valley Officer Groups and Committees Screen

This screen is used to define the groups and committees that are used to classify [Officer and Volunteer](#) records. You can also see the number of records in each category. Items in this table are used to populate the drop-down box on the [Valley and Committee Officer Definitions Maintenance](#) screen.

You may delete the entire record by clicking on the Delete action link. Please note that only groups with a count of zero may be deleted.

Table 68: Sentinel Valley Officer Groups and Committees Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Group	Required Field	Select the group to which the office belongs
Edit Link	Action Link	Click the link to edit the record
Delete Link	Action Link	Click the link to delete the record
Add Link	Action Link	When you have completed the text of the Note, click the Add link to save the information

15.6.6 Valley and Committee Officer Definitions Maintenance

Valley and Committee Officer Definitions Maintenance

Group	Office Name	Office Rank	Required By System?	Number in Use	
Council	Commander	1	Yes	1	[Edit] [Delete]
Consistory	Master of Kadosh	1	Yes	2	[Edit] [Delete]
Brick Committee	Istes	1	No	0	[Edit] [Delete]
Lodge	Venerable Master	1	Yes	4	[Edit] [Delete]
Chapter	Wise Master	1	Yes	5	[Edit] [Delete]
Add=	<input type="text"/>	<input type="text"/>	No		[Add]
1					

Figure 113: Sentinel Valley and Committee Officer Definitions Maintenance Screen

This screen is used to define the Office and Committee roles that are used to classify Officer and Volunteer records. You can also see the number of records in each category.

You may delete the entire record by clicking on the Delete action link. Please note that only groups with a count of zero may be deleted.

Table 69: Sentinel Valley Officer Groups and Committees Fields and Buttons

Field/Button Name	Field/Button Information	Field/Button Description
Group	Required Field	Select the group to which the office belongs
Office Name	Optional Field	Enter the name of the office as it appears on the other Sentinel screens
Office Rank	Optional Field	Rank refers to the office's position within a group (organizational level or committee). In the example above, Master of Kadosh is the highest rank in the Consistory group, and Wise Master is the highest rank in the Chapter group. Rank is used to sort records in reports and data extracts. Enter a number that indicates the office's relative position in the group.

15.6.7 User-Defined Label Maintenance

Edit User Defined Field Labels

1. Favorite Color	6. Sample Label 6
2. Inseam	7. Sample Label 7
3. License Plate	8. Sample Label 8
4. Sample Label 4	9. Sample Label 9
5. Sample Label 5	10. Sample Label 10

Figure 114: Sentinel User-Defined Label Maintenance Screen

There are ten fields on the [Other Member Info](#) screen that can be customized to reflect a Valley's particular needs. This screen is used to assign a label to those fields. Simply type the label for each field in the appropriate text box and click the **Save** button. You do not need to label all the fields.

NOTE: User-defined fields have a maximum length of 50 characters.

15.6.8 Select Different Valley

Selecting this menu option opens the [Select a Valley](#) screen so that you can change Valleys without having to log out and log in again.

16 Common Sentinel Errors and Error Messages

This is a troubleshooting guide that explains how Sentinel indicates that an error has occurred, and how to solve the problem that created the error.

When you encounter a technical issue or error that is not covered in this troubleshooting guide, your first resource is your Valley Administrator. [Technical support](#) is also available.

16.1.1 Errors in Individual Fields

Fields with errors show a yellow background, as in Figure 115 below, when you try to save or move on to the next step in a process. You must correct the error in the marked field(s) to proceed.



Figure 115: Field with Yellow Background Indicating an Error

This error occurs because the information you have entered is [formatted incorrectly](#), or is inappropriate for the field type. For example, entering a ZIP code in a phone number field results in this error. The [message bar](#) may provide additional information in some cases.

16.1.2 Required Fields

Required fields have an aqua background, as shown in Figure 116.



Figure 116: Required Field with Aqua Background

All required fields on a screen *must* have data in them in order to proceed. If you try to proceed without information in one or more required fields, you receive a required field error message. If the screen is a search screen, Sentinel simply returns a **No Matching Records Found** message, as shown in Figure 117 below.

No matching people or member records were found based on the search criteria you supplied.

[Click Here to try again](#)

Figure 117: No Matching Records Found Message

On any other kind of screen, Sentinel displays an error message that lists the required fields, like the one in Figure 118 below.



Figure 118: Required Fields Error Dialog Box

In addition, the screen refreshes and displays a list of required fields, as shown in Figure 119.

The following fields must be entered to save this page:

- Last Name
- First Name
- Preferred Name
- Preferred Address Line 1

Figure 119: Required Fields List on Screen

Fill in all required fields on the screen to eliminate this error.

16.1.3 Content Edit Checks

Sentinel checks the format of certain data items, such as phone numbers, dates, email addresses, and ZIP codes. For example, if you enter only four digits in a ZIP code field, then Sentinel prompts you to correct the error. Table 70 below describes correct field formats.

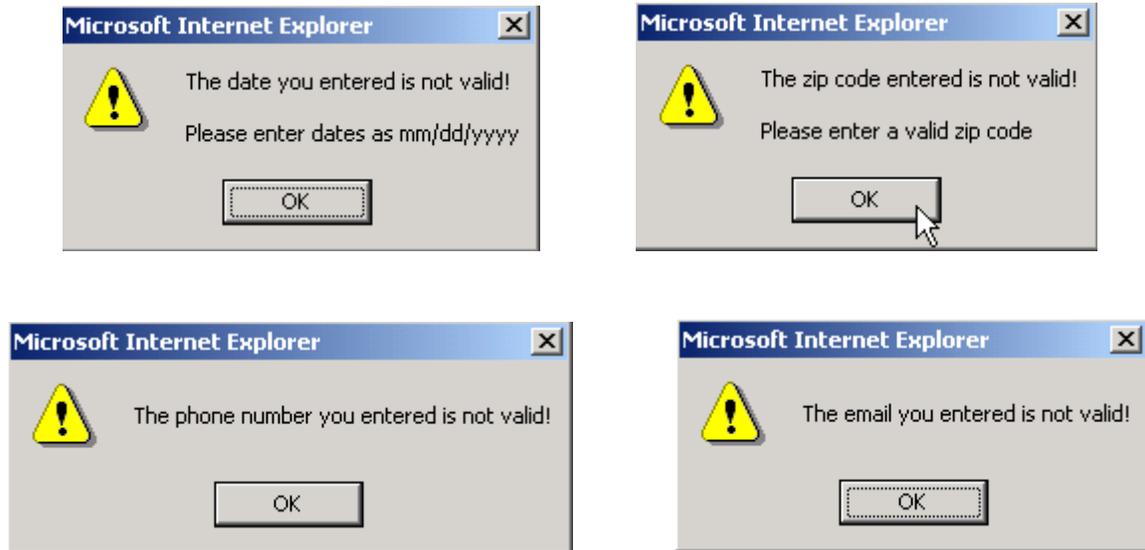


Figure 120: Sample Sentinel Edit Check Error Messages

NOTE: When entering dates, phone numbers, and ZIP codes it is not necessary to include hyphens or parentheses. Sentinel automatically formats these fields. When entering a dollar amount, be sure to include the decimal point and two digits to the right of the decimal point (cents amount), even if it is .00.

To eliminate the error, click **OK** in the error message dialog box to close it, and re-enter the information in the field using the correct format.

Table 70: Sentinel Field Formats

Field Type	Correct Format
ZIP code	5 digits (46220) or 5 digits + 4 digits (46220-4184)
Phone Number	Area code and 9 digits (317-555-1212)
Dates	Two-digit month, two-digit day, four-digit year (12/01/2004)
Email	XXXX@XXXXX.XXX
Dollar Amounts	Automatically formats to two decimal places <i>For example, if you enter 100, then Sentinel formats the amount as 100.00. If you enter 1.000, then Sentinel formats the amount as 1.00.</i>
Year	Four-digit year (2004)

16.1.4 General Errors

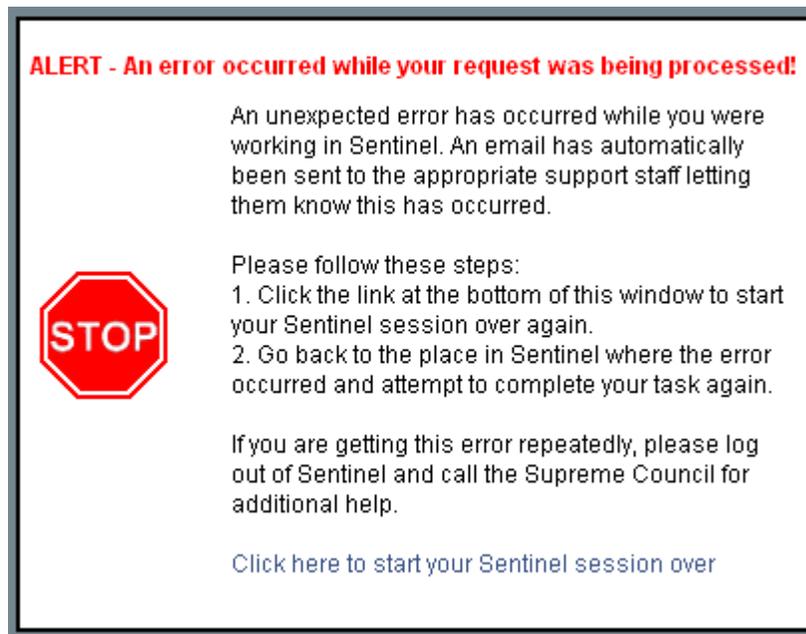


Figure 121: Sentinel General Error Message

The general error message appears whenever there is an error in the system that is “unexpected,” or unanticipated the programmers who created the Sentinel program. A detailed email message is sent automatically to the System Administrator to inform him or her of the circumstances and nature of the error.

When this error appears, follow these steps:

1. Click the **Click here to start your Sentinel session over link**,
2. [Log in](#) to Sentinel normally,
3. Go back to the place in Sentinel where the error occurred, and attempt the exact same task again.

If you get the same error repeatedly (three times or more), log out of Sentinel and call the Supreme Council for help at (202) 232-3579.

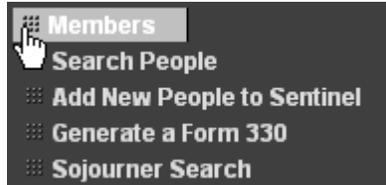
17 Task Quick-Reference Guide

This section may be photocopied by authorized Sentinel users without violation of copyright.

Quick reference guides are step-by-step instructions for performing common tasks. Follow the steps in the order listed to complete the task.

17.1 Add a Candidate to the Sentinel Database

1. Select [Add New People to Sentinel](#) from the **Members** menu



2. Enter as much information as possible about the Candidate. At the very least, you must enter:
 - ❖ Last Name
 - ❖ First Name
 - ❖ Preferred Name
 - ❖ Preferred Address Line 1
3. Select Candidate in the **Valley Status** drop-down box
4. Enter the effective date of the Candidate Status in the **on** box

Valley Status on

5. Click the **Save** button

Save

17.2 Change a Candidate Record to a Member Record

1. Search for the Candidate using the [Member Quick Lookup](#) or [People Search](#) screen
2. Select the Candidate record from the [Browse People Search Results](#) screen by clicking on a hyperlink
3. On the [Profile](#) tab of the record, change **Valley Status** from Candidate to Member
4. Enter the effective date of the Member Status in the **on** box

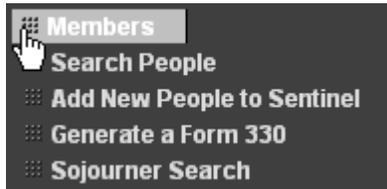
Valley Status on

5. Click the **Save** button

Save

17.3 Generate a Form 330

1. Select [Generate a Form 330](#) from the Members menu



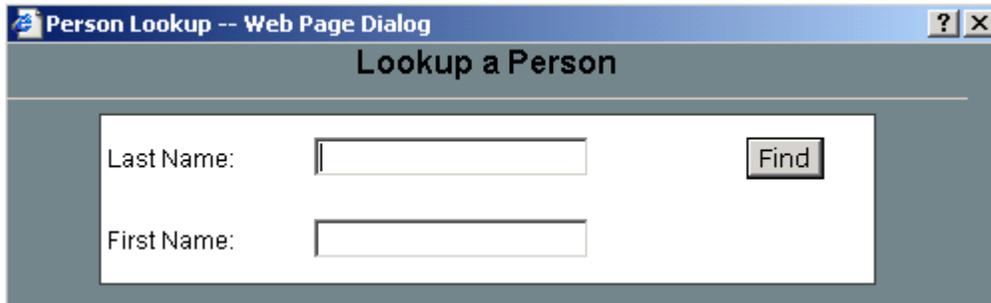
2. Enter the number of initiates in the **Number of men to be included on this form 330?** box

Number of men to be included on this form 330?

3. Click the OK button and wait for the [Data Entry](#) screen to appear



4. Using the ? button and the [Lookup a Person](#) dialog box, search for the person who will be invested. When you click the **Find** button, Sentinel searches for matching records and the screen refreshes, showing the search results.



5. In the **Lookup a Person** dialog box, click the **Select** button that is in the same row as the name of the person to be invested.

Name	Member ID	
Alban, Marigold Russell	-1	Select

6. Sentinel automatically records that person's name in the **New Member** box and close the **Lookup a Person** dialog box.



7. Enter the effective date of the investiture in the Chapter in the Chapter Date box

Chapter Date

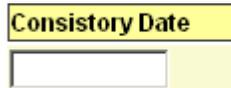
8. Enter the effective date of the investiture in the Lodge in the Lodge Date box

A yellow rectangular box with the text "Lodge Date" in bold black font at the top. Below the text is a white rectangular input field with a thin black border.

9. Enter the effective date of the investiture in the Council in the Council Date box

A yellow rectangular box with the text "Council Date" in bold black font at the top. Below the text is a white rectangular input field with a thin black border.

10. Enter the effective date of the investiture in the Consistory in the Consistory Date box

A yellow rectangular box with the text "Consistory Date" in bold black font at the top. Below the text is a white rectangular input field with a thin black border.

11. Enter the reason for the Form 330 (initiation, additional degrees, affiliation from other jurisdiction) in the large text box.

A long, thin, light gray rectangular text box with a thin black border. The text inside reads: "Describe here if this is an: INITIATION, ADD'L DEGREES, AFFILIATION FROM OTHER JURISDICTION!"

12. Click the **Save** button.

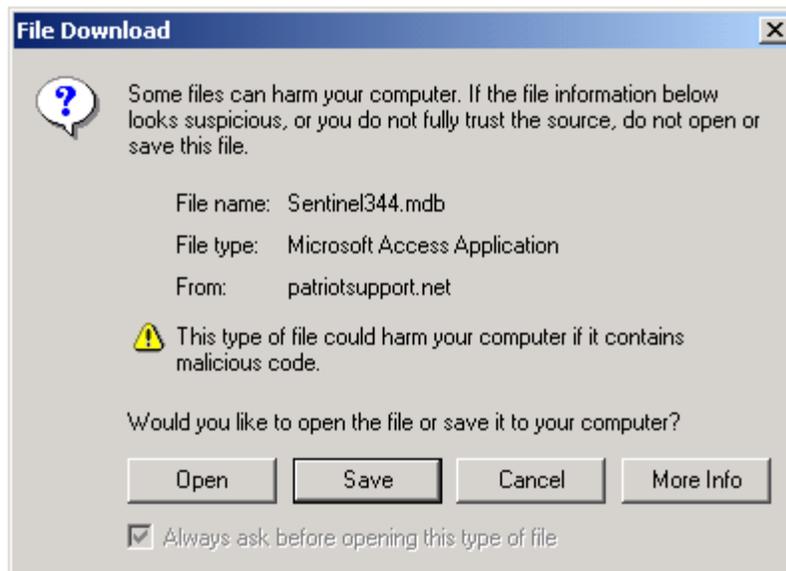
A gray rectangular button with the text "Save" in black font.

13. Sentinel saves the information you have entered and opens the [Generate Form](#) screen.

14. Click the **Click here to generate your form 330 report** button

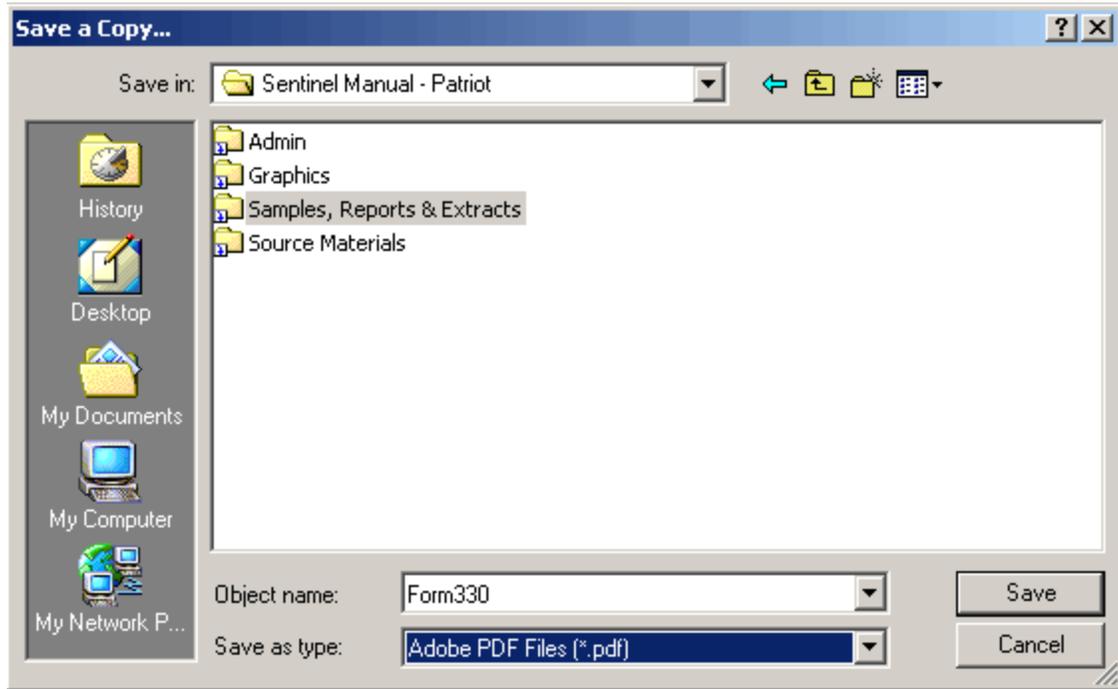
A wide, thin, light gray rectangular button with a thin black border. The text inside reads: "Click here to generate your form 330 report".

15. The **File Download** dialog box opens. Click the **Open** button.



16. Adobe Reader opens and the completed Form 330 displays. Click the print icon  to print the form.

- ❖ If you want to save the Form 330, click the save icon .
- ❖ The **Save a Copy** dialog box opens.
- ❖ Name the file and click the **Save** button



17.4 Request a Statistical Change (Non Form 330)

1. Search for the Member using the [Member Quick Lookup](#) or [People Search](#) screen
2. Select the Member record from the [Browse People Search Results](#) screen by clicking on a hyperlink
3. On the [Profile](#) tab of the record, click the **SC Mem Valley, Eff Date and Status Code [Request Statistical Change]** link.

[SC Mem Valley, Eff Date and Status Code \[Request Statistical Change\]](#)

4. Sentinel opens the [Request Statistical Change](#) dialog box.

Request Statistical Change For Member

Current Membership Status for Member			
Level	Valley	Status	Effective Beginning On
Lodge:	Baltimore	D	
Chapter:	Baltimore	D	
Council:	Baltimore	D	
Consistory:	Baltimore	D	

Proposed Membership Status for Member			
Level	Valley	Status	Effective Beginning On
Lodge:	Baltimore		
Chapter:	Baltimore		
Council:	Baltimore		
Consistory:	Baltimore		

Optional note explaining the request

Save this Request

http://patriotssupport.net:8080/People/RequestStatistical Internet

5. Enter the new Status and the effective date of the new Status for the Lodge, Chapter, Council, and Consistory. Enter an explanatory note in the large box.
6. Click the **Save this Request** button. Sentinel queues the request for review by the Supreme Council.

17.5 Change an Address, Phone Number, or Email Address

1. Search for the Member using the [Member Quick Lookup](#) or [People Search](#) screen
2. Select the Member record from the [Browse People Search Results](#) screen by clicking on a hyperlink
3. On the [Profile](#) tab of the record, change the address, phone number, or email address information as necessary.

Primary Address

Type:

Status:

Line 1:

Line 2:

City,State:

Zip:

County:

Country:

Change Code:

Telephone Numbers

Home: Work: Cell:

Email Addresses

1: Preferred?

2: Preferred?

NOTE: You can edit any information in the entire profile (on any tab) that is not grayed out.

4. After all the changes are made, click the **Save** button.

18 Keyboard Shortcuts

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Keyboard shortcuts are combinations of keystrokes that allow you to perform actions without using the mouse. Simply press all the listed keys simultaneously to perform the action.

Table 71: Sentinel Keyboard Shortcuts

Function	Shortcut
Copy	Ctrl + C
Cut	Ctrl + X
Paste	Ctrl + V
Select All	Ctrl + A
Send cursor to beginning of field	Home
Send cursor to end of field	End
Move cursor to the next field	Tab
Move cursor to the previous field	Shift + Tab

NOTE: Normal Windows shortcuts are functional in Sentinel.

19 Advanced Search Examples

If you wish search for more than one possible match in a single field, such as searching for last names that are Martin, Parker, or Smith, then you can enter two or more search criteria in a single field, so long as the search criteria are separated by a comma. For the above example, you can enter "Martin, Parker, Smith" in the **Last Name** field. This functionality is available in alphanumeric fields only (not dates or currency).

19.1 Selecting Search Criteria in Drop-down Boxes

If you are using search criteria from a drop-down box, you can select multiple options in a single drop-down box by holding down the **Ctrl** key and clicking on each option that you wish to select. You can also select a contiguous range of options. Click on the first item in the list. Then, hold down the **Shift** key and click on the last item in a list.

19.2 Alphanumeric Text Field Searches:

"Is Null" Matches anything where the field is blank.

"Is Not Null" Matches anything where the field is not blank. ' "

19.2.1 Asterisks

"*" Asterisk matches any characters

19.2.1.1 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)

19.2.2 Underscores

"_" Underscore Matches any single character

19.2.2.1 Examples:

"Mar_in" Matches items with anything in the fourth position. Would match Martin, Marlin, Markin

19.2.3 Hyphens

"-" Hyphen allows range searches

19.2.3.1 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.

19.2.4 Greater Than

">" Greater than Matches values alphabetically after the criteria

19.2.4.1 Examples:

"> M" Matches anything beginning with an M and everything in the alphabet coming after the letter M. Would match Max, Maxine, Nancy, Paul

19.2.5 Less Than

"<" Less than matches values alphabetically after the criteria

19.2.5.1 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.

19.3 Date Field Searches:

"Is Null" Matches anything without a date.

"Is Not Null" Matches anything with a date (functions the same as wildcard "*").

19.3.1 Asterisks

"*" Asterisk Matches any dates

19.3.1.1 Examples:

"*" Matches any date.

19.3.2 Greater Than

">" Greater than matches dates after the criteria date

19.3.2.1 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

19.3.2.2 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.

19.3.3 Less Than

"<" Less than matches dates before the criteria date

19.3.3.1 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

19.3.3.2 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.

19.3.4 Hyphen

"-" Hyphen allows date range searches. These searches are inclusive.

19.3.4.1 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

19.4 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 "*").

19.4.1 Asterisks

"*" Asterisk searches are not supported for numeric fields. Instead, use ">0" or "Is Not Null" when looking for anything with a numeric value.

19.4.2 Greater Than

">" Greater than matches values more than the criteria amount

19.4.2.1 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.

19.4.2.2 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.

19.4.3 Less Than

"<" Less than matches values less than the criteria amount

19.4.3.1 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.

19.4.3.2 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.

19.4.4 Hyphen

"-" Hyphen allows numeric range searches. These searches are inclusive.

19.4.4.1 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

20 Glossary

Application: A piece of software designed to perform a specific task or set of tasks

Browser: (also, Web browser) Software used to surf the Internet/World-wide Web. Internet Explorer (IE) is a browser commonly used by PCs.

Candidate: A prospective Member who has not yet completed initial degree work

Case-sensitive: A field that is case-sensitive checks the capitalization of letters. For example, a case-sensitive field does not accept "adams" in place of "Adams."

Cookie: A small text file stored on the PC. The file stores information such as site preferences and personally identifiable information.

Data extract: A collection of information drawn directly from the tables in the Sentinel database

Dialog box: A special window opened to solicit a specific response

Download: Transferring data from one computer to another computer or peripheral device, such as a disk drive; also, information that has been transferred in this way

Edit check: An edit check is an automatic examination of data entered in a field to make sure that the information is complete and correct for the field type

Ellipsis: A punctuation mark that looks like three periods in a row (...). Used to indicate that there is more to see; indicates additional pages in a search results set.

Field: Any area such as a check box, drop-down box selection, radio button, or checkbox that stores data

Firewall: A security program that filters incoming data

Format: 1) The structure or organization of data; 2) File type (MS Excel, PDF, etc.)

GUI: Graphical User Interface; software that allows people to interact with computers in a visual way

Hyperlink: (Also, link) a word, symbol, image, in an electronic document that links to another such element in the same document or in another electronic document. Click on the link to activate it.

Icon: Image on the computer screen that represents a program, file, function, etc.

IE: Internet Explorer, Microsoft's web browsing program

ISA: Internet Security and Acceleration

Keyboard shortcut: Combinations of keystrokes that allow you to perform actions without using the mouse

MS: Microsoft

Operating system: Program that maintains files, runs other programs, and handles devices such as the monitor, mouse, and keyboard

Output: Information produced by the computer; usually displayed on a screen or printed

Patriot: The database program used by the Supreme Council

PC: Personal Computer

PDF: Portable Document Format, a graphics file type

Relational database: A collection of information organized into linked tables

SC: Supreme Council; this abbreviation often appears on field labels

Screen refresh: Information makes a round trip to the server, changes are saved, and the screen is reset for the next action

Server: A computer with a great deal of memory and a specialized operating system that is set up to send data to and receive data from other computers

SNS: Sentinel Notification System

SSL: Secure Socket Layer

URL: Universal Resource Locator, website address displayed in the address bar of a browser

Wildcard: A character that is used to represent one or more unknown or variable characters in a search

Windows: Microsoft's PC operating system program

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