This Users Manual is a work in progress. It concentrates on data entry, since this is the first concern. The section on reports (getting the data out again in useful formats), will be expanded in the next version of this manual.

This version of the NAFRA Internet Database Manual has been produced in a format which will be easily copied by the Regions for their local fraternities. To wit, the pages are loosely bound so that they can be removed for copying purposes, and copied on only one side to make duplication easier.

Regional Ministers may decide to omit Section 5 when providing copies to their local fraternities, as it is not relevant to the local fraternity.

If you find any discrepancies or need assistance, please contact us at admin@nafra-sfo.org
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# Introduction

The NAFRA Internet Database is intended to assist the National Fraternity in collecting and maintaining a list of the membership of the Order in the United States. Among the anticipated benefits of this system are:

- The ability to maintain a permanent record of the membership of the Order in the United States, for historical and administrative purposes;
- The ability of members who have lost their documentation to verify the date and place of their profession;
- The ability of the National Fraternity to determine an accurate profile of the membership of the Order, in order to be better able to serve the needs of the membership;
- The ability to provide TAU-USA, the national newsletter, to the entire membership;
- The ability for members with similar interest and ministries to find one another;
- The ability to improve communications within the Order;

# Access and Security

Great care has been taken to ensure the privacy and security of the data within the system. It should be noted that *none of the information collected in this system will be available to the public in any way.* Additionally, out of respect for the privacy concerns expressed by some members, access to the system, even within the Order, will be carefully limited.

As a result of this, many of the features described in this documentation will not be available to all users. Access to the system is limited with the intention that no user will be able to view or edit any more information than he or she actually needs. While some may view this as unnecessarily limiting the usefulness of the system, it is the only way to ensure that privacy concerns are respected.

There are three basic access levels available: national, regional, and local. National access is intended for members of the National Executive Council, and any others that the Executive Council determines to have a legitimate need to see the data. Each Regional Executive Council will receive one regional user account, which will allow access to information for the entire region. Each region will therefore be responsible for the maintenance of its own data. At its discretion, the Regional Executive Council may wish to delegate the maintenance of local fraternity data to each local fraternity. In this case, one local fraternity account will be made available to each local fraternity, upon request.

The system will require each user to change his or her user password regularly. Please guard your password safely. Please do not share it with anyone else, even members of your council. Part of the responsibility for the security of this system lies with each individual user. If another member of your council or your fraternity has a legitimate need to access the data, please request a new, separate user account for them.
3 General Information

There are several elements that are common throughout many parts of the system. In order to avoid repeating them throughout this document, they are described here.

3.1 Reports / Home / Logout Buttons

These buttons appear at the top-right of every page.

**Reports** – Click on this button to see a list of reports which you can obtain and use (see Section 9).

**Home** – Click on this button to return to the page that first appeared when you logged in. This is your “home page”.

**Logout** – Click on this button when you have finished your session. It will inform the system that you have finished, and it will end your connection to the database.

3.2 Submit / Reset / Cancel Buttons

On pages where data is entered or edited, three buttons appear at the bottom of the screen:

**Submit** – When you have finished editing or entering data, you must click on this button to send it to the database system. *Until you press this button, the data you have entered is not stored.* Please press this button only once, and wait for a response.

**Reset** – This button will clear all the data from the screen, and allow you to re-enter information from scratch.

**Cancel** – This button will exit the page you are on, without sending any data to the database. Use this if you have changed your mind, and want to return to the previous page without making any permanent changes to the data.

3.3 Required Fields

On pages where data is entered or edited, some of the fields will have a red star next to them. This star marks the fields where data must be entered before the “Submit” button can be clicked successfully. If you try to submit data without entering information in these fields, you will receive an error message.
4 Getting Started…

The NAFRA Internet database can be accessed by pointing your web browser to http://www.nafra-sfo.org/database/

When you do, you will see the following screen:

![Login Page](image)

Figure 1 - Login Page

In order to proceed, you must have been assigned a Login Id and password. If you are a first time user who has not yet been assigned a password, you must send your request via e-mail, through your Regional Minister, to admin@nafra-sfo.org. Please include your name, your e-mail address, and your reason for requesting access to the system. You will then receive an e-mail with your Login Id and password.

Enter this information in the “Login Id” and “Password” fields provided, and then click on the “Login” button.

If you have forgotten your password, you can click on the “Forgot Password” link. The system will send a new password to the e-mail address that is on record for you in the system. The system will not send login information to any other location.

The pages that will appear next depend on your access level. For the moment, we will assume that you are a regional user. In this case, you will see the “Regional Fraternity” page for your region. If you are a local user, continue reading at section 6. If you are a national user, you will be presented with the “National Fraternity” page. (The functions on this page are more or less identical to the analogous functions on the Regional page.)
5 Regional Fraternity Pages

5.1 Main Regional Fraternity Page
This page is divided into several sections:

5.1.1 Action Links

The top of this page shows a set of clickable links that will allow you to edit the information displayed on the page. These are:

**Edit Regional Fraternity** – This allows you to update the information shown in the “Regional Fraternity Details” section, such as the date of the region’s last Chapter of Elections, or most recent Fraternal Visit from the National Fraternity. (Such information will assist the National Executive Council in planning future visits). (See Section 5.2)

**Add Non-NAFRA Member** – This allows you to add people to the database who are not Secular Franciscans. In essence, this means local and regional Spiritual Assistants. Please use this feature with discretion. Do not add names of people not directly involved in your Regional Fraternity. (See Section 8.2).

**Add New Local Fraternity** – This feature is used to add a “newly forming group” (which will become a new local fraternity) to the database. Also, it can be used to add existing local fraternities that are not currently listed in the “Local Fraternities List” (see Section 5.3).
Assign Spiritual Assistants – This is used to add the names of your Regional Spiritual Assistants to the “Regional Spiritual Assistants” list (see Section 5.4). The Spiritual Assistant must already exist in the database. If he or she is not, you must add them using the “Add Non-NAFRA member” link discussed above.

Show Members – This will show a searchable list of all the members in your region (see Section 8.1)

Change Password – This will allow you to change your own user password. (see Section 8.3)

5.1.2 Regional Fraternity Details

Below the links is the “Regional Fraternity Details” section (see Figure 2). This provides a summary of the information which the database has for your region. If you are logging on for the first time, you may find that much of this information is missing.

This data can be updated, either by clinking on the “Edit Regional Fraternity” link at the top of the page, or the “Edit” link in the title bar of the “Regional Fraternity Details” section. This will bring you to the “Edit Regional Fraternity” page (see Section 5.2).

5.1.3 Regional Officers/Appointees

<table>
<thead>
<tr>
<th>Regional Officers/Appointees</th>
<th>Add Offices</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Position</strong></td>
<td><strong>Officers</strong></td>
</tr>
<tr>
<td>Minister</td>
<td>Terri Leone, SFD</td>
</tr>
<tr>
<td>Vice-Minister</td>
<td>Not Available</td>
</tr>
<tr>
<td>Secretary</td>
<td>Not Available</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Not Available</td>
</tr>
<tr>
<td>Formation Director</td>
<td>Not Available</td>
</tr>
<tr>
<td>District Councilor</td>
<td>Not Available</td>
</tr>
</tbody>
</table>

**Regional Spiritual Assistants**

Assign Regional Spiritual Assistant

No Data Available

<table>
<thead>
<tr>
<th>Local Fraternities List</th>
<th>Add Local Fraternity</th>
</tr>
</thead>
<tbody>
<tr>
<td>#</td>
<td>Name</td>
</tr>
<tr>
<td>----</td>
<td>------</td>
</tr>
<tr>
<td>69101</td>
<td>Saint Anthony Fraternity</td>
</tr>
<tr>
<td>69102</td>
<td>Cathedral</td>
</tr>
<tr>
<td>69103</td>
<td>Chrisaint The King</td>
</tr>
<tr>
<td>69104</td>
<td>Immaculate Concept</td>
</tr>
<tr>
<td>69105</td>
<td>Saint Joseph Fraternity</td>
</tr>
</tbody>
</table>

Figure 3 - Regional Fraternity Page (center)

The next section (see Figure 3) shows the elected Regional Executive Council members, and those members who have been appointed to some special position within the Region (e.g. Family Commission Chair). There are three columns:

**Positions** – This column lists the elected offices and appointed positions that your region uses. This will always include Minster, Vice Minster, Secretary, Treasurer, and Formation Director. Beyond these Constitutionally required positions, however, each region is likely to have additional positions on this list, including Commission Chairs, newsletter editors, etc. In order to add a new
position, click on the “Add Offices” link on the title bar. This will bring you to the “Add Offices” page (see Section 8.4).

**Officers** – This column shows the name of the person who holds this regional office or position. You can click on the name to view further details about that person.

**Actions** - This column shows the actions that can be taken regarding this office or position. These include:

- Assign New – Use this link to assign a new person to this office or position. It will bring you to the “SFO Members” page (see Section 8.1), where you can choose a name from the list of members.
- Remove – Use this link to remove the current name from this office or position.

### 5.1.4 Regional Spiritual Assistants

The “Regional Spiritual Assistants” section (see Figure 3), lists the Regional Spiritual Assistants. To add Spiritual Assistants to this list, click on the “Assign Regional Spiritual Assistant” link in the title bar. This will take you to the “Assign Regional Spiritual Assistants” page (see Section 5.4).

⚠️ Please note that the person in question must already be in the database before you can record their assignment as your Spiritual Assistant. If they are not in the database they must first be added to it. For Spiritual Assistants who are not Secular Franciscans, this is achieved using the “Add Non-NAFRA Members” page (see Section 8.2).

There are two columns:

- **Name** – This column shows the names of the Regional Spiritual Assistants. You can click on the name to view or edit further details about that person.
- **Actions** - This column shows the actions that can be taken regarding this Spiritual Assistant. These include:

  - Remove – Use this link to remove the name from the list of Regional Spiritual Assistants.

### 5.1.5 Local Fraternities List

The “Local Fraternities List” section (see Figure 3) shows a list of all the active local fraternities in the region. To add a fraternity to this list (whether it is an established fraternity, and emerging fraternity, or a newly forming group), click on the “Add Local Fraternity” link in the title bar. This takes you to the “Add Local Fraternity” page (see Section 5.3). There are three columns:

- **#** - This column displays the fraternity number, assigned by the National Fraternity. The first two digits are identical to the Region number.
- **Name** - This column shows the fraternity name, and the city and state where it is located. You can click on the name to view or edit further details about that fraternity. This will take you to the “Local Fraternity” page (see Section 6.1).
- **Actions** - This column shows the actions that can be taken regarding this fraternity. These include:

  - Edit - Use this link to edit details about the local fraternity. It will take you to the “Edit Local Fraternity” page (see Section 6.2).

### 5.1.6 Deactivated Local Fraternities List

The “Deactivated Local Fraternities List” section shows a list of all the inactive local fraternities in the region. There are three columns:

- **#** - This column displays the fraternity number, assigned by the National Fraternity. The first two digits are identical to the Region number.
**Name** - This column shows the fraternity name, and the city and state where it was located

**Actions** - This column shows the actions that can be taken regarding this fraternity. These include:

- **Edit** - Use this link to edit details about the inactive local fraternity. It will take you to the “Edit Local Fraternity” page (see Section 6.2).

### 5.2 Edit Regional Fraternity Page

#### 5.2.1 Regional Details

![Edit Regional Fraternity](image)

(Fields that are marked with an * are mandatory fields.)

- **Region Number** - Enter two digit region number
- **Regional Fraternity Name** - Saint Katharine Drexel Region
- **Description** - Eastern PA, Southern NJ, and DE
- **Establishment Date** - 2001
- **Official Seat** - Philadelphia, PA
- **Date of Last Election** - March 15, 2001
- **Date of Last Pastoral Visit** - March 15, 2000
- **Date of Last Fraternal Visit** - March 15, 2000
- **Notations** - you can enter maximum of 200 characters

The top of this page (see Figure 4) allows the user to view and edit the identifying details of the Region. It includes the following fields:

- **Region Number** – Two-digit regional identification number assigned by NAFRA
- **Regional Fraternity Name** – The official name of the Region
- **Description** – A brief geographical description of the Region
- **Establishment Date** – The date on which the Region was canonically established
- **Official Seat** – For administrative purposes, the “headquarters” of the Region.
- **Date of Last Election** – The date of the most recent Regional Chapter of Elections
- **Date of Last Pastoral Visit** – The date of the most recent Pastoral Visit from the Conference of National Spiritual Assistants.
- **Date of Last Fraternal Visit** – The date of the most recent Fraternal Visit from a member of the National Executive Council.
- **Notations** – This space is available to make brief miscellaneous comments, if needed.
5.2.2 Permanent Address and Contact Information

These sections (see Figure 5) allow the user to view and edit the permanent address and contact information for the Region, if any such information exists. This is intended solely for contact information that will not change over the long term. For example, the Region’s permanent office information, if any, should be entered here. Please do not enter the Minister’s address, or any other non-permanent information, in this space.

**Address 1-3** – Regional mailing address (e.g. street address or post office box).

**City** – city of Regional mailing address

**Country** – country of Regional mailing address (for our purposes, this will always be “USA”)

**State** – state of Regional mailing address

**State (if not listed)** – leave this blank. This field is included to allow the entry of non-USA mailing addresses, in the event that this database design may be used by CIOFS as a prototype.

**Zip/Postal Code** – Zip code of Regional Mailing address

**Phone 1-2** – Permanent Regional telephone numbers, if any

---

Figure 5 - Edit Regional Fraternity (bottom)
Fax – Permanent Regional fax number, if any
Email 1-2 – Permanent Regional e-mail addresses, if any
Website URL – Internet address of the Region’s web site
Receive TAU-USA – Should a copy of TAU-USA be sent to this address?

5.3 Add Local Fraternity

This page is used to add a new local fraternity to the Region. This may be an already established fraternity that is not yet listed in the database, or it may be an emerging fraternity or a newly forming group.

Figure 6 - Add Local Fraternity
Local Number – The 3-digit number assigned to this fraternity by the National Fraternity
Local Fraternity Name – The official name of this local Fraternity
Establishment Date – The date of the canonical establishment of this fraternity
Establishing Friar – The name of the friar who represented the friar Province which established this fraternity
Establishing Bishop – The name of the Bishop who approved the establishment of this fraternity in his Diocese
Status – Choose the status of this fraternity from this list. The options are, “Newly Forming Group”, “Emerging Fraternity”, or “Established”.
Affiliated Province – Choose from this list the name of the friar Province which provides altius moderamen to this fraternity.
Establishing Province - Choose from this list the name of the friar Province which established this fraternity.
Cessation Date – If this fraternity has been deactivated, enter the date on which this occurred.
Revival Date - If this fraternity has been deactivated, and then re-activated, enter the date on which this reactivation occurred.
Meeting Time – Enter the time when this local fraternity meets. For example, “1:00pm on Third Sundays”.
Regional Fraternity – This field displays the Regional fraternity to which this local fraternity belongs.
Date of Transfer of Assistance – If the altius moderamen for this fraternity has been transferred from the establishing friar Province to another, enter the date that this occurred.
Satellite of - If this fraternity is the satellite of another local fraternity, choose the “parent” fraternity from this list.
National Fraternity - This field displays the National fraternity to which this local fraternity belongs.
Date of Last Election – The date of the most recent local Chapter of Elections
Date of Last Pastoral Visit – The date of the most recent Pastoral Visit from the Conference of Regional Spiritual Assistants.
Date of Last Fraternal Visit – The date of the most recent Fraternal Visit from a member of the Regional Executive Council.
Notations – This space is available to make brief miscellaneous comments, if needed.
5.4 Assign Regional Spiritual Assistant

This page (see Figure 7) is used to choose a Regional Spiritual Assistant from a list of people. There are several ways to change the list of names that is displayed on the screen:

**Pick a letter** – Choosing a letter from the “alphabet bar” towards the top of the page will bring up a list of all the people whose last names begin with that letter.

**Search** – You can search for people by first name, middle name, or last name. Choose your option from the list box in the “Search” section, and enter the name for which you are searching. For example, to bring up a list of people with last name “Hilferty”, select “Last Name”, type in “Hilferty”, then click on the “Go” button. The list will appear.

The “People List” has five columns:

- **#** - A sequence number. This can be ignored.
- **First Name** – The person’s first name
- **Middle Name** – The person’s middle name
- **Last Name** – The person’s last name
- **Report Name** – The person’s name, as it will appear on reports, mailing labels, etc. You can click on the name to view further details about this person.
- **Actions** – This column shows the actions that can be taken regarding this person. These include:

  - **Assign** – This will assign this person as a Spiritual Assistant to the Region.
6 Local Fraternity Pages

6.1 Main Local Fraternity Page

This page is divided into several sections:

6.1.1 Action Links

The top of this page (see Figure 8) shows a set of clickable links that will allow you to edit the information displayed on the page. These are:

**Edit Fraternity** – This allows you to update the information shown in the “Local Fraternity Details” section, such as the date of the fraternity’s last Chapter of Elections, or most recent Fraternal Visit from the Regional Fraternity. (see Section 6.2) (Such information will assist the Regional Executive Council in planning future visits).

**Add SFO Member** – This is used to add a new fraternity member to the database (see Section 6.3). This could be an already professed member who is missing from the database, or a new Inquirer or Candidate. Do not use this feature to add someone who has transferred into your local
fraternity. This person probably already exists in the database, and should be transferred by their previous local fraternity.

**Assign Spiritual Assistants** – This is used to add the name of your local Spiritual Assistant to the “Local Spiritual Assistants” list (see Section 6.4). The Spiritual Assistant must already exist in the database. If he or she does not, you must contact your Regional Minister, to have them added.

**Show Members** – This will show a searchable list of all the members in your fraternity (see Section 8.1)

**Change Password** – This will allow you to change your own user password (see Section 8.3)

### 6.1.2 Local Fraternity Details

Below the links is the “Local Fraternity Details” section (see Figure 8). This provides a summary of the information which the database has for your fraternity. If you are logging on for the first time, you may find that much of this information is missing.

This data can be updated, either by clicking on the “Edit Fraternity” link at the top of the page, or the “Edit” link in the title bar of the “Local Fraternity Details” section. This will bring you to the “Edit Local Fraternity” page (see Section 6.2).

### 6.1.3 Local Officers/Appointees

The next section (see Figure 9) shows the elected Local Executive Council members, and those members who have been appointed to some special position within the fraternity (e.g. Family Commission Chair). There are three columns:

**Positions** – This column lists the elected offices and appointed positions that your fraternity uses. This will always include Minster, Vice Minster, Secretary, Treasurer, and Formation Director. Beyond these Constitutionally required positions, however, each fraternity may have additional positions on this list, including Commission Chairs, newsletter editors, etc. In order to add a new position, click on the “Add Offices” link on the title bar. This will bring you to the “Add Offices” page (see Section 8.4).

**Officers** – This column shows the name of the person who holds this fraternity office or position. You can click on the name to view further details about that person (see Section 7).

**Actions** - This column shows the actions that can be taken regarding this office or position. These include:

- **Assign New** – Use this link to assign a new person to this office or position. It will bring you to the “SFO Members” page (see Section 8.1), where you can choose a name from the list of members.
- **Remove** – Use this link to remove the current name from this office or position.
6.1.4 Local Spiritual Assistants

The “Local Spiritual Assistants” section (see Figure 9), lists the Local Spiritual Assistants. To add Spiritual Assistants to this list, click on the “Assign Local Spiritual Assistant” link in the title bar. This will take you to the “Assign Local Spiritual Assistants” page (see Section 6.4).

Please note that the person in question must already be in the database before you can record their assignment as your Spiritual Assistant. If they are not in the database they must first be added to it. For Spiritual Assistants who are not Secular Franciscans, this can only be achieved from the Regional or National access level.

There are two columns:

Name – This column shows the names of the Local Spiritual Assistants. You can click on the name to view or edit further details about that person.

Actions - This column shows the actions that can be taken regarding this Spiritual Assistant. These include:

Remove – Use this link to remove the name from the list of Local Spiritual Assistants.
6.1.5 Members Lists

<table>
<thead>
<tr>
<th>Active Professed Members</th>
<th>Add Member</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pauline Shepherd, SFO – Professed on: 01/01/2001</td>
<td></td>
</tr>
<tr>
<td>Terri Laone, SFO – Professed on: 01/01/2001</td>
<td></td>
</tr>
</tbody>
</table>

| Candidates |
| No Data Available. |

| Inquirers |
| No Data Available. |

| Inactive Members |
| No Data Available. |

| Deceased Members |
| No Data Available. |

Figure 10 - Local Fraternity Page (bottom)

Fraternity members are listed in the following five sections (see Figure 10):

**Active Professed Members** – This section shows a list of all the active professed members in the local fraternity.

**Candidates** – This section shows a list of all fraternity members who have participated in the Rite of Admission, but are not yet professed.

**Inquirers** – This section shows a list of all fraternity members who have been accepted as Candidates, but have not yet participated in the Rite of Admission.

**Inactive Members** – This section shows a list of all fraternity members who have been suspended, or dismissed, or have voluntarily withdrawn, according to the General Constitutions.

**Deceased Members** – This section shows a list of all members of the local fraternity who are deceased.

If you click on a person’s name, you will be taken to the “Member Details” page (see Section 7), where you can view and edit information regarding that person.
6.2 Edit Local Fraternity Page

6.2.1 Local Fraternity Details

Figure 11 - Edit Local Fraternity (top)

(Fields that are marked with an * are mandatory fields.)

* Local Number 101
Enter three digit local number

* Local Fraternity Name Saint Anthony Fraternity

Establishment Date month day year

Establishing Friar

Establishing Bishop

* Status Established

* Affiliated Province Most Sacred Heart of Jesus

Establishing Province Most Sacred Heart of Jesus

Cessation Date month day year

Revival Date month day year

Meeting Time

The top of this page (see Figure 11) allows the user to view and edit the identifying details of the fraternity. It includes the following fields:

Local Number – The 3-digit number assigned to this fraternity by the National Fraternity

Local Fraternity Name – The official name of this local Fraternity

Establishment Date – The date of the canonical establishment of this fraternity

Establishing Friar – The name of the friar who represented the friar Province which established this fraternity

Establishing Bishop – The name of the Bishop who approved the establishment of this fraternity in his Diocese

Status – Choose the status of this fraternity from this list. The options are, “Newly Forming Group”, “Emerging Fraternity”, or “Established”.

Affiliated Province – Choose from this list the name of the friar Province which provides altius moderamen to this fraternity.

Establishing Province - Choose from this list the name of the friar Province which established this fraternity.

Cessation Date – If this fraternity has been deactivated, enter the date on which this occurred.
Revival Date - If this fraternity has been deactivated, and then re-activated, enter the date on which this reactivation occurred.

Meeting Time – Enter the time when this local fraternity meets. For example, “1:00pm on Third Sundays”.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Regional Fraternity</td>
<td>Saint Katharine Drexel Region</td>
</tr>
<tr>
<td>Date of Transfer of Assistance</td>
<td>Select month, day, and year</td>
</tr>
<tr>
<td>Satellite of</td>
<td>Choose a local fraternity from the list</td>
</tr>
<tr>
<td>National Fraternity</td>
<td>NAFRA</td>
</tr>
<tr>
<td>Date of Last Election</td>
<td>Select month, day, and year</td>
</tr>
<tr>
<td>Date of Last Pastoral Visit</td>
<td>Select month, day, and year</td>
</tr>
<tr>
<td>Date of Last Fraternal Visit</td>
<td>Select month, day, and year</td>
</tr>
<tr>
<td>Notations</td>
<td>Enter notations, maximum of 200 characters</td>
</tr>
<tr>
<td>Diocese</td>
<td>Select from the list of Dioceses</td>
</tr>
<tr>
<td>Receive TAU-USA</td>
<td>Select Yes or No</td>
</tr>
</tbody>
</table>

Regional Fraternity – This field displays the Regional fraternity to which this local fraternity belongs.

Date of Transfer of Assistance – If the altius moderamen for this fraternity has been transferred from the establishing friar Province to another, enter the date that this occurred.

Satellite of – If this fraternity is the satellite of another local fraternity, choose the “parent” fraternity from this list.

National Fraternity - This field displays the National fraternity to which this local fraternity belongs.

Date of Last Election – The date of the most recent local Chapter of Elections

Date of Last Pastoral Visit – The date of the most recent Pastoral Visit from the Conference of Regional Spiritual Assistants.

Date of Last Fraternal Visit – The date of the most recent Fraternal Visit from a member of the Regional Executive Council.

Notations – This space is available to make brief miscellaneous comments, if needed.

Diocese – Choose from this list the Diocese in which the local fraternity is located.

Receive TAU-USA – Should a copy of TAU-USA be sent to the permanent address of the local fraternity? (This should ordinarily be set to “No”, as all fraternity members, and the Spiritual Assistants, will already receive their own copy.)
6.2.2 Permanent Address and Contact Information

These sections (see Figure 13) allow the user to view and edit the permanent address and contact information for the local fraternity, if any such information exists. This is intended solely for contact information that will not change over the long term. For example, the parish where the fraternity meets may be entered here. Please do not enter the Minister’s address, or any other non-permanent information, in this space.

Address 1-3 – Fraternity mailing address (e.g. street address or post office box).
City – city of fraternity mailing address
Country – country of fraternity mailing address (for our purposes, this will always be “USA”)
State – state of fraternity mailing address
State (if not listed) – *leave this blank*. This field is included to allow the entry of non-USA mailing addresses, in the event that this database design may be used by CIOFS as a prototype.

**Zip/Postal Code** – Zip code of fraternity Mailing address

**Phone 1-2** – Permanent fraternity telephone numbers, if any

**Fax** – Permanent fraternity fax number, if any

**Email 1-2** – Permanent fraternity e-mail addresses, if any

**Website URL** – Internet address of the fraternity’s web site
6.3 Add Member Page

This page (see Figure 14) is used to add local fraternity members to the database. 

**Prefix** – Mr., Mrs., Miss, Ms., Fr., Dr., etc.

**First Name** – Member’s first name

**Middle Name** – Member’s middle name

**Last Name** – Member’s last name or surname

### Figure 14 - Add Member

(Fields that are marked with an * are mandatory fields.)

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefix</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
</tr>
<tr>
<td>* Last Name</td>
<td></td>
</tr>
<tr>
<td>* Display Name</td>
<td></td>
</tr>
<tr>
<td>Birth Date</td>
<td>month: 3, day: 2, 1983</td>
</tr>
<tr>
<td>* Member Type</td>
<td>Professed, Candidate, Inquirer</td>
</tr>
<tr>
<td>Clergy</td>
<td>Lay</td>
</tr>
<tr>
<td>Acceptance Date</td>
<td>month: 1, day: 1, 2001</td>
</tr>
<tr>
<td>Admission Date</td>
<td>month: 1, day: 1, 2001</td>
</tr>
<tr>
<td>Local Fraternity where Admitted</td>
<td>-- select a fraternity --</td>
</tr>
<tr>
<td>Temporary Profession Date</td>
<td>month: 1, day: 1, 2001</td>
</tr>
<tr>
<td>Local Fraternity where Temporarily Professed</td>
<td>-- select a fraternity --</td>
</tr>
<tr>
<td>Permanent Profession Date</td>
<td>month: 1, day: 1, 2001</td>
</tr>
<tr>
<td>Local Fraternity where Permanently Professed</td>
<td>-- select a fraternity --</td>
</tr>
<tr>
<td>Receive TAU-USA</td>
<td>Yes, No</td>
</tr>
</tbody>
</table>

**Notations**
**Display Name** – Use this field to determine exactly how this person’s name should appear on reports, mailing labels, etc.

**Birth Date** – Member’s date of birth

**Member Type** – Select whether this person is a professed member, a Candidate, or an Inquirer

**Clergy** – If this person has received Holy Orders (Bishop, Priest, Deacon), select from this list.

**Acceptance Date** – Enter the date when this person was accepted as an Inquirer

**Admission Date** – Enter the date when this person participated in the Rite of Admission, and was admitted as a Candidate

**Local Fraternity where Admitted** – Choose from this list the local fraternity where this person was originally admitted as a Candidate.

**Temporary Profession Date (if applicable)** – If this person made a temporary profession of the SFO Rule, before making a permanent profession, enter the date of this temporary profession here.

**Local Fraternity where Temporarily Professed** - If this person made a temporary profession of the SFO Rule, before making a permanent profession, choose the name of the fraternity where they made the temporary profession from this list.

**Permanent Profession Date** – If this person is a permanently professed member, enter the date of their profession here.

**Local Fraternity where Permanently Professed** - If this person is a permanently professed member, choose the name of the fraternity where they made their profession from this list.

**Receive TAU-USA** - If this person is a permanently professed member, they are entitled to receive a free subscription to TAU-USA. In this case, make sure that “Yes” is selected.

**Notations** – This space is available to make brief miscellaneous comments, if needed. (For example, the reason for suspension or withdrawal.)

<table>
<thead>
<tr>
<th>Mailing List</th>
<th>Press Ctrl and click to select multiple Mailing List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Languages Known</td>
<td>Press Ctrl and click to select multiple Languages</td>
</tr>
<tr>
<td>Fluent Language</td>
<td>Press Ctrl and click to select multiple Language</td>
</tr>
<tr>
<td>Interests</td>
<td>Press Ctrl and click to select multiple interest</td>
</tr>
</tbody>
</table>

**Mailing List** – Use this field to select which mailing lists this person wishes to join.

**Languages Known** – Select the languages in which this person is fluent. You can select multiple languages by holding down the “Ctrl” button on your keyboard, and clicking on the names of the languages.

**Fluent Language** – Select the language this person uses most in their daily life.

**Interests** – From the list, select the ministries and apostolates in which the person engages. You can select multiple interests by holding down the “Ctrl” button on your keyboard, and clicking on them. This information may be useful in helping Secular Franciscans with similar interests find one another.
**contact information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 1</td>
<td>Member's mailing address (e.g. street address or post office box).</td>
</tr>
<tr>
<td>Address 2</td>
<td></td>
</tr>
<tr>
<td>Address 3</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>City of member's mailing address.</td>
</tr>
<tr>
<td>Country</td>
<td>Country of member's mailing address (for our purposes, this will always be “USA”).</td>
</tr>
<tr>
<td>State</td>
<td>State of member’s mailing address.</td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td>The Zip Code should be in one of the following formats: 90201 or 90210-1234.</td>
</tr>
<tr>
<td>Phone 1</td>
<td>All Phone numbers should be in the following format: 301-123-4567.</td>
</tr>
<tr>
<td>Phone 2</td>
<td></td>
</tr>
<tr>
<td>Mobile</td>
<td>Member’s cell phone number, if any</td>
</tr>
<tr>
<td>Fax</td>
<td>Member’s fax number, if any</td>
</tr>
<tr>
<td>Email 1</td>
<td>Member’s e-mail addresses, if any</td>
</tr>
<tr>
<td>Email 2</td>
<td></td>
</tr>
<tr>
<td>Website URL</td>
<td>Member’s personal web site, if any</td>
</tr>
</tbody>
</table>

**Address 1-3** – Member’s mailing address (e.g. street address or post office box).

**City** – City of member’s mailing address

**Country** – Country of member’s mailing address (for our purposes, this will always be “USA”)

**State** – State of member’s mailing address

**State (if not listed)** – Leave this blank. This field is included to allow the entry of non-USA mailing addresses, in the event that this database design may be used by CIOFS as a prototype.

**Zip/Postal Code** – Zip code of member’s Mailing address

**Phone 1-2** – Member’s telephone number, or numbers

**Mobile** – Member’s cell phone number, if any

**Fax** – Member’s fax number, if any

**Email 1-2** – Member’s e-mail addresses, if any

**Website URL** – Member’s personal web site, if any
6.4 Assign Local Spiritual Assistant

This page (see Figure 17) is used to choose a Local Spiritual Assistant from a list of people. There are several ways to change the list of names that is displayed on the screen:

Choose a letter – Choosing a letter from the “alphabet bar” towards the top of the page will bring up a list of all the people whose last names begin with that letter.

Search – You can search for people by first name, middle name, or last name. Choose your option from the list box in the “Search” section, and enter the name for which you are searching. For example, to bring up a list of people with last name “Hilferty”, select “Last Name”, type in “Hilferty”, then click on the “Go” button. The list will appear.

The “People List” has five columns:

# - A sequence number. This can be ignored.
First Name – The person’s first name
Middle Name – The person’s middle name
Last Name – The person’s last name
Report Name – The person’s name, as it will appear on reports, mailing labels, etc. You can click on the name to view further details about this person.
Actions – This column shows the actions that can be taken regarding this person. These include:

Assign – This will assign this person as a Spiritual Assistant to the fraternity.

Figure 17 - Assign Local Spiritual Assistant
7 Member Details

There is a set of pages which allow the user to view and edit information for an individual fraternity member. The principle one of these is the “Member Details” page.

This page (see Figure 18) shows information in two sections:

**Contact Information** – This section shows information as it was entered via the “Add Member” page (see Section 6.3 for the meanings of the fields).

**SFO Related Information** – This section shows information such as offices held within the Order, fraternity membership, and profession date.

Figure 18 - Member Details
The top of this page shows a set of clickable links that will allow you to edit the information displayed on the page. These are:

**Edit Profile** – This link allows the user to edit the member’s name, interests, languages spoken, etc. (see Section 7.1).

**Edit Address** – This link allows the user to edit the member’s address, phone numbers, e-mail addresses, and other contact information (see Section 7.2).

**Dismiss** – Click here to record the member’s dismissal from the Order, according to the General Constitutions. (see Section 7.3)

**Withdraw** – Click here to record the member’s voluntary withdrawal (temporary or definitive) from the Order, according to the General Constitutions. (see Section 7.4)

**Mark as Deceased** – Click here to record a member’s death. (see Section 7.5)

**Mark as Professed** – Click here to record the permanent or temporary profession of a Candidate. (see Section 7.6)

**Mark as Admitted** – Click here to record the date of the Rite of Admission of a Candidate. (see Section 7.7)

**Mark as Suspend** – Click here to record the suspension of a member from the fraternity, according to the General Constitutions. (see Section 7.8)

**Transfer** – Click here to record the transfer of a member from this local fraternity to another. *This is the proper way to record a transfer.* (see Section 7.9)

### 7.1 Edit Profile

This page allows you to edit a member’s name, birth date, notations, clerical status, mailing lists, interests, languages spoken, and whether they should receive a subscription to TAU-USA. The layout and fields on this page are very similar to those on the “Add Member” page. Please refer to Section 6.3 and Figures 14 and 15 for information on these fields.

### 7.2 Edit Address

This page allows you to edit a member’s basic contact information, including address, telephone numbers, e-mail addresses, and personal website. The layout and fields on this page are very similar to those on the “Contact Information” section of the “Add Member” page. Please refer to Section 6.3 and Figure 16 for information on these fields.

### 7.3 Dismiss Member

This page (see Figure 19) allows the user to record the dismissal of a member from the Secular Franciscan Order, according to Article 58(2-4) of the *General Constitutions*.

![Edit Member - Dismiss Member](image)

**Dismissal Date** – Enter the date on which the dismissal became effective.

It would be helpful to add a “Notation” on the “Edit Profile” page (see Section 7.1) explaining the reason for the dismissal.
7.4 Member Withdrawal

This page (see Figure 20) allows the user to record the voluntary temporary withdrawal of a member from the fraternity, according to Article 56 of the *General Constitutions*, or the voluntary definitive withdrawal of a member from the Order, according to Article 58(1) of the *General Constitutions*.

![Figure 20 - Member Withdrawal](image)

Temporary Withdrawal Date
Definitive Withdrawal Date

Enter the date only into the field that is appropriate to the event you wish to record.

Temporary Withdrawal Date - Enter the date on which the voluntary temporary withdrawal became effective.

Definitive Withdrawal Date - Enter the date on which the voluntary definitive withdrawal became effective.

7.5 Member Deceased

This page (see Figure 21) allows the user to record the date of death of a member of the Order.

![Figure 21 - Member Deceased](image)

Deceased Date

Deceased Date – Enter the date of death.
7.6 Profession
This page (see Figure 22) allows the user to record the fact that a Candidate has made a temporary or permanent profession in the Order.

![Figure 22 – Profession](image)

Temporary Profession Date – Enter the date on which the Candidate participated in the Rite of Temporary Commitment to the Gospel Life (see the Ritual of the Secular Franciscan Order).

Local Fraternity where Temporarily Professed – Choose from this list the name of the local fraternity where the Candidate participated in the Rite of Temporary Commitment to the Gospel Life.

Permanent Profession Date – Enter the date on which the Candidate participated in the Rite of Profession (see the Ritual of the Secular Franciscan Order).

Local Fraternity where Permanently Professed – Choose from this list the name of the local fraternity where the Candidate participated in the Rite of Profession.

7.7 Admission
This page allows the user to record the fact that an Inquirer has participated in the Rite of Admission (see the Ritual of the Secular Franciscan Order), and become a Candidate in the Order.

Admission Date – Enter the date on which the Inquirer participated in the Rite of Admission.

Local Fraternity where Admitted – Choose from this list the name of the local fraternity where the Candidate participated in the Rite of Admission.
7.8 Suspend Member

This page (see Figure 23) allows the user to record the suspension of a member from the fraternity, according to Article 56(2) of the General Constitutions.

*Suspend Date* - Enter the date on which the suspension became effective.

It would be helpful to add a “Notation” on the “Edit Profile” page (see Section 7.1) explaining the reason for the suspension.

7.9 Member Transfer

This page (see Figure 24) allows the user to record the transfer of a member to a different local fraternity, according to Article 55 of the General Constitutions. This is the proper way to record a transfer.

*Region* – Choose from this list the Region into which the member is transferring.

*Select a Local Fraternity* – Choose from this list the name of the local fraternity into which the member is transferring.

*Transfer Date* – Enter the date on which the transfer became effective.
8 General Purpose Pages

8.1 Member List

This page (see Figure 25) shows a list of members in the fraternity. There are several ways to change the list of names that is displayed on the screen:

Choose a letter – Choosing a letter from the “alphabet bar” towards the top of the page will bring up a list of all the people whose last names begin with that letter.

Search – You can search for people by first name, middle name, or last name. Choose your option from the list box in the “Search” section, and enter the name for which you are searching. For example, to bring up a list of people with last name “Jerostic”, select “Last Name”, type in “Jerostic”, then click on the “Go” button. The list of people who have the last name “Jerostic” will appear.

The “People List” has five columns:

# - A sequence number. This can be ignored.
First Name – The person’s first name
Middle Name – The person’s middle name
Last Name – The person’s last name
Report Name – The person’s name, as it will appear on reports, mailing labels, etc. You can click on the name to view further details about this person.

Actions – This column shows the actions that can be taken regarding this person. This will vary depending on what action the user was performing before arriving at this page. These may include:

Assign – This will assign this person to an office or position in the fraternity. (see Sections 5.1.3 and 6.1.3)
8.2 Add Non-NAFRA Member

This page (see Figures 26 and 27) allows you to add people to the database who are not Secular Franciscans. This will be used most commonly to add local, regional, and national Spiritual Assistants. Please use this feature with discretion. Do not add names of people not directly involved in the business of the Secular Franciscan Order.

Prefix – Mr., Mrs., Miss, Ms., Sr., Br., Fr., Dr., etc.
First Name – Person’s first name
Middle Name – Person’s middle name
Last Name – Person’s last name or surname
Display Name – Use this field to determine exactly how this person’s name should appear on reports, mailing labels, etc.
**Birth Date** – Person’s date of birth

**Order** – If this person is a member of an Order, select their Order from this list.

**Clergy** – If this person has received Holy Orders (Bishop, Priest, Deacon), select from this list.

**Affiliated Province** – If this person is a member of a religious Order, select their Province from this list.

**Mailing List** – Use this field to select which mailing lists this person wishes to join.

**Languages Known** – Select the languages in which this person is fluent. You can select multiple languages by holding down the “Ctrl” button on your keyboard, and clicking on the names of the languages.

**Fluent Language** – Select the language this person uses most in their daily life.

**Receive TAU-USA** – Should this person receive a copy of TAU-USA? This should be “Yes” for all Spiritual Assistants.

**Notations** - This space is available to make brief miscellaneous comments, if needed.

<table>
<thead>
<tr>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Address1</td>
</tr>
<tr>
<td>Address2</td>
</tr>
<tr>
<td>Address3</td>
</tr>
<tr>
<td>* City</td>
</tr>
<tr>
<td>* Country</td>
</tr>
<tr>
<td>* State</td>
</tr>
<tr>
<td>State (if not listed)</td>
</tr>
<tr>
<td>* Zip/Postal Code</td>
</tr>
<tr>
<td>The Zip Code should be in one of the following formats: 90201 or 90210-1234.</td>
</tr>
<tr>
<td>Phone 1</td>
</tr>
<tr>
<td>All Phone numbers should be in the following format: 301-123-4567.</td>
</tr>
<tr>
<td>Phone 2</td>
</tr>
<tr>
<td>Mobile</td>
</tr>
<tr>
<td>Fax</td>
</tr>
<tr>
<td>Email 1</td>
</tr>
<tr>
<td>Email 2</td>
</tr>
<tr>
<td>Website URL</td>
</tr>
</tbody>
</table>

![Figure 27 - Add Non-NAFRA Member (bottom)](image)
Address 1-3 – Person’s mailing address (e.g. street address or post office box).
City – City of Person’s mailing address
Country – Country of Person’s mailing address (for our purposes, this will always be “USA”)
State – State of Person’s mailing address
State (if not listed) – Leave this blank. This field is included to allow the entry of non-USA mailing addresses, in the event that this database design may be used by CIOFS as a prototype.
Zip/Postal Code – Zip code of Person’s Mailing address
Phone 1-2 – Person’s telephone number, or numbers
Mobile – Person’s cell phone number, if any
Fax – Person’s fax number, if any
Email 1-2 – Person’s e-mail addresses, if any
Website URL – Personal web site, if any

8.3 Change Password Page
This page (see Figure 28) allows users to change their own password. For security reasons, the system will require you to change your password periodically.

Figure 28 – Change Password

Old Password – Enter your current password here
New Password – Enter the password that you would like to have.
Confirm New Password – Re-enter the password you typed in the previous field. Since you are unable to see what you have typed in these fields, this will ensure that you did not make a typographical error, and so assign yourself a password that you did not intend.
8.4 Add Offices Page

This page (see Figure 29) allows you to select which offices your regional or local fraternity uses. The offices that you currently use are listed in the “Existing Offices” section. To add an additional office, select it from the list. You can select multiple offices by holding down the “Ctrl” key on your keyboard, and clicking on the offices you want to select.

If the office that you want to add is not listed, you can type it into the field on the right side of the screen.

![Add Offices](image)

Figure 29 - Add Offices
9 Reports

Clicking on the “Reports” button from any page will bring the user to the “Reports” page (see Figure 30). This page shows a list of reports that the user is able to obtain, based on the set of data that is available to that user. For example, a user with regional access will obtain reports containing data based on his or her own region only. Similarly, a user with local access will obtain reports containing data on his or her own local fraternity only.

The figure below shows the screen as it will appear to a regional user. Click on the name of a report to obtain that report.

List of Local Fraternities – This report lists basic information for each of the local fraternities within the region.

List of Members – This report shows a list of all members in the region, and some basic information about each member.

Members – Address – This report lists the names and addresses of all the members in the region.

Regional Officers/Appointments – This report lists the names, addresses, and positions of all those who hold a regional elected office or appointed position within the region.

Local Officers/Appointments – This report lists the names, addresses, and positions of all those who hold a local elected office or appointed position.

Regional Spiritual Assistants – This report lists the names and addresses of the Regional Spiritual Assistants.

Local Spiritual Assistants – This report lists the names and addresses of the persons who provide local Spiritual Assistance to the local fraternities within the Region.

Reports with Multiple Output Formats – This page allows the user to choose from a variety of output formats, and to filter the names in the report by local fraternity, interests, etc.