

# **Getting Started with MORI**

## ***What is MORI***

MORI is an online replacement for the Masonic Lodge Secretaries System (MLSS). It includes all functionality that was included in MLSS.

MORI differs significantly from MLSS because it uses the Grand Lodge database to manage all of its information. The secretaries of the lodges will have direct access to the same database used by Grand Lodge. No longer will Grand Lodge and the individual lodges be using copies of information and need to keep them in sync.

## ***Where is MORI***

MORI is available using your web browser at: <http://mori.nymasons.org:8080/mori/>

## ***The MORI Menu***

When you first arrive at the MORI page you will see a menu at the top, which includes the Help, Language, and Account items. Become familiar with the menu, as you will use it to navigate the system and access different functions.

Placing your mouse pointer over the menu will cause it to open up, allowing you to select the function you need to use.

## ***Creating Your Account***

The first step in using MORI is creating your account. On the MORI page using the menu go to: Account -> Create Account. You will need your Grand Lodge number, the number of a lodge you belong to and your birth date. Step through the screens by filling in the forms and hitting the appropriate button at the bottom.

You will need to enter a password of your choice for your account, which must be a minimum of eight characters and a mixture of letters and numbers.

## ***Why do we use a password and a key?***

Once you have created your account MORI will assign you an account key. This is an additional piece of information that is required to access your account. We use this to create a more secure system, discouraging hackers from attempting to access the account due to the greater amount of information needed.

## ***Getting and Inserting Your Key***

After your account has been created Grand Lodge will mail you a letter containing your key. Once you have received the letter go to the MORI page. On the menu go to: Account -> Insert Key. Enter the key in the form, and click the button to insert the key into your browser.

You will only need to insert this key once to be able to access your account on MORI.

Note for advanced users if you use multiple computers or web browsers to access MORI you will need to enter the key into each computer or web browser.

### ***Logging in for the First Time***

Once you have inserted your key on the menu go to: Account -> Login. Fill in the form with your Grand Lodge number and the password that **you** created, and click the button.

## **Using MORI Everyday**

### ***Logging In***

Go to the MORI page. The login form will come up by default. Enter your Grand Lodge number and the password **you** created, and click the button.

### ***Managing Your Roster***

#### **Finding a Brother**

On the menu go to: Membership -> Find Member. This will bring up a form that will allow you to search for members, and widows in your lodge. You are only allowed to look up records for you lodge.

The form contains fields for last name, first name, Grand Lodge number, and status. By default the results exclude deceased, suspended and expelled brothers. Should you want to include them click the appropriate check box to add them to the results.

Once you have done a search, if there are any matching brothers you will see a list of them. This list is scrollable within the page. If there are more brother than will fit on the list, there will links to page through the results.

Next to each brother/person there are four buttons: Summary, Edit, View and Profile.

Clicking the Summary button will change the brief display of information presented at the bottom of the page. This will allow you to get a quick look at a brother's information to make sure you are working on the correct record.

Clicking the Edit button will bring the brother up in the edit form.

Clicking the View button will bring up the information on the brother in read only mode.

Clicking the Profile button will produce a PDF file of the brother's Masonic history.

#### **Editing a Brother's Information**

By clicking the Edit button on the Find Member results page you will open that member's information in edit mode.

The Edit Member screen contains a multi-tabbed form. Look along the top of the form and you will see tabs labeled: member data, contact info, lodge affiliation, events, and lodge info. Click the tabs to become familiar with how they function. Each tab contains information pertaining to a particular area. Any field that is editable will appear in a small box. Click into the box or use the tab key to navigate the form.

## **Editing an Address**

To edit a brother's address look them up using the Find Member screen, click the edit button, then click the contact info tab.

Edit the address to your liking. Then select the change source, either lodge, member or post office corresponding to where you received the new address information from.

## **Entering a Registry Event**

To enter a registry event such as passed, raised, dimitted, etc. look up the member using the Find Member function, then click the edit button, then click the events tab. On this page there is a drop down list of possible events next to the "Add Event" label. This list will only contain the events that are Constitutionally allowed given your role as a secretary and the brother's Masonic status. Select the appropriate event, enter the date of the event to the right, and click the add button.

**NOTE: It is unnecessary to send a Registry Form to the Grand Secretaries office for events you have added using MORI. Should you need a certificate of dimit or clearance though, you will still need to contact the Grand Secretaries office.**

## **Adding a New Member**

To add a new member to your roster go to: Membership -> Add Member

## **Adding a Widow to Your Roster**

To add a new widow to your roster go to: Membership -> Add Member. Fill in the form, selecting the Widow option, just below the Spouse name field.

## **Adding a New Domestic Affiliate**

To add a new Domestic Affiliate go to: Membership -> Add Affiliate. Fill in the form selecting your lodge, as the lodge to affiliate with. If you are adding an Honorary member check the Honorary check box. After you have completed the form click the "Next" button.

The next page will show you the brother's Masonic status in Grand Lodge, as well as the other domestic lodges they are affiliated with. If the brother is in good standing click the confirm key to add the member to your lodge.

Once you have added a member to your lodge you will be forwarded to the Find Member screen. This allows you to immediately look the member up, edit them, and set their Lodge Member Type.

## **Adding a New Foreign Affiliate**

### **What is a foreign affiliate?**

A foreign affiliate is any Mason who wishes to join a lodge in your Grand Jurisdiction who does not belong to a lodge in your Grand Jurisdiction.

Before you can vote on the petition for affiliation of a foreign Mason you must get clearance to do so from your Grand Lodge via the Grand Secretary.

## **How does MORI handle foreign affiliates?**

The MORI system is designed to collect information about foreign affiliates, which is conveyed to your Grand Lodge to allow them to check the status of the brother. Once the brother's status has been ascertained the affiliation will either be approved or denied.

If your Grand Lodge approves a petition for affiliation by a foreign Mason, then and only then can the lodge ballot on the petition.

## **Entering a Petition for a Foreign Affiliate**

On the main menu go to: Membership -> Add Foreign Affiliate. Fill in the form. You will need to fill in the brother initiating, passing and raising date, as well as the lodge from which he is affiliating. You will need to select the Grand Jurisdiction under whose authority he received his degrees, and whose lodge he currently belongs.

## **Checking the Status of a Foreign Affiliation**

On the main menu go to: Membership -> Pending Foreign Affiliations.

This page is broken into four sections: New, Pending, Approved and Denied. Pending foreign affiliations when first entered into the system, before Grand Lodge has taken any action on them, will be in the new section. Once Grand Lodge has begun to work on a petition it will be in the pending section. If a petition has been approved it will be moved to the approved section. If a petition is denied it will be moved to the denied section.

While a petition is moving through the process there will be notes attached to it, which can be reached through the link in the options column. These notes will allow you to see what actions Grand Lodge has taken, and what responses they have received from the foreign jurisdiction.

## ***Managing Lodge Information***

### **Dues Management**

### **Overview**

### **Creating Member Types**

On the main menu go to: Lodge -> Member Types

## **Boot Strapping Dues**

## **Creating Dues Entries for a New Year**

## **Entering a Member Payment**

## **Editing Dues/Arrears**

## **Recommended Web Browser – Mozilla Firefox**

### ***Comaptible Browsers***

The MORI system has been designed to be compatible with a wide range of web browsers. MORI is compatible with the following browsers:

On Microsoft Windows: MS Internet Explorer 6+; Mozilla Firefox

On Apple Mac OS X: Apple Safari; Mozilla Firefox; Mozilla Camino

On Linux: Mozilla Firefox

### ***Mozilla Firefox***

MORI is extensively tested and primarily developed in Mozilla Firefox. It is recommended that you use Firefox for best results. Firefox is free software, and can be downloaded from <http://www.mozilla.org/>.

## **Quick Guide**

Find a member: Membership -> Find Member

Edit a member: Membership -> Find Member; Enter your search and click the search button; Click the “Edit” button next to the member you want to edit.

Enter a registry event: Membership -> Find Member; Enter your search and click the search button; Click the “Edit” button next to the member you need to add the event for; Click the “Events” tab; Select the type of event from the list, enter the date and click the “Add” button.

Print a member’s profile: Membership -> Find Member; Enter your search and click the search button; Click the “Profile” button.