

Secretary's Helper Version 4 Installation and Version 3 Conversion Quick Instructions

The instructions which follow are basic and should be sufficient to allow an Alpha Tester

- to install Secretary's Helper Version 4,
- verify the location of all files,
- run the program,
- create a new database, and
- convert the data files from Secretary's Helper Version 3 to Version 4.
- Basic navigation within the application.

Installation

As normal with a Windows Installation, run the Installation program and accept all defaults.

After Installation, check the following:

Secretary's Helper program is call SecHelp4.exe and should be located at C:\Program Files (x86)\Linshaw\
The Database does not exist at this moment.

Run the program.

The Application

Secretary's Helper Version 4, like similar products, has two parts

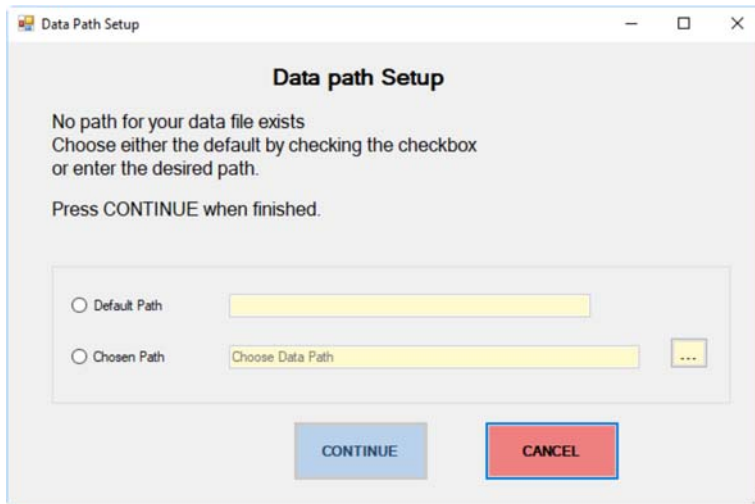
- The program which manipulates the data—this has been done using Microsoft Visual Studio
- The database which is a Microsoft Access database.

You do not need a full version of Microsoft Access installed on your machine but you will require the Microsoft Access database engine. You will prompted the first time that you run the program if this is not on your system.

The engine can be downloaded free of charge from the Microsoft Download site.

Create Data Path

The program will open and run, the Data Path setup form.



You may choose the Default Path (C:\SecHelp4Data\) Or Choose a path of your own, including Network drives. DropBox, etc.

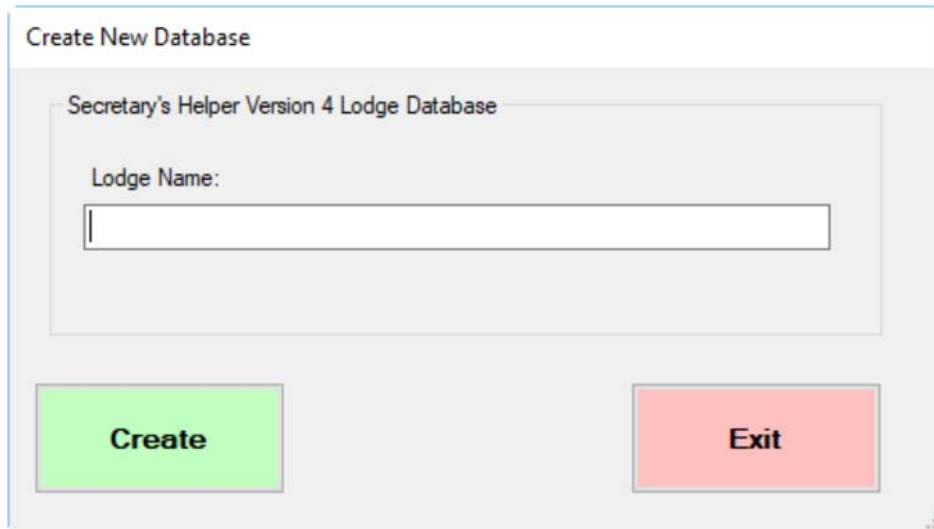
To select the folder of your choice, click on the



NOTE: This path relates to ALL databases (Lodges) that you may install on the current machine. It is can be modified later.

Press the CONTINUE button when finished.

Create Database



The “Create New Database” option requires that you enter the name of the Lodge, this can be changed easily later. (Does not accept some characters including the single quote mark ('))

Click on the “Create (New Database)” button.

You are done.

Setup Lodge

After setting creating the database, it is opened in the program and you are shown the Lodge Information screen.

You must setup specific Lodge values which is new to Version 4 and is important for the conversion of your data from Version 3.

Setting up Lodge defaults

It is important to now set up the defaults as they apply to THIS Lodge.

Lodge Information

Lodge

Lodge Name:

Address:

Phone:

Email:

Website:

Corporate No.

GL Return:

Grand Lodge

GL Name:

Address:

Phone:

Fax:

Contact:

Email:

Website:

Anniversary Date Calculation

Initiation

Lodge Installation

First Sunday of January

Lodge Year Start: Current Year(s) (2018)

Grand Lodge Installation

First Sunday of January

Grand Lodge Year Start: (2018)

For the conversion of current Lodge and Grand Lodge Officers to work correctly, you must set both the Lodge and Grand Lodge Installations and SAVE the record. This will show the “current” Lodge and Grand Lodge years for your verification.

Lodge Installation

First Saturday of December

Lodge Year Start: Current Year(s) (2018)

Grand Lodge Installation

Second Saturday of June

Grand Lodge Year Start: (2018 - 2019)

After saving the record, a new button is displayed:

Click on this button to start the process of converting Secretary’s Helper Version 3 records to Version 4 records.

NOTE: A conversion can only be done into an empty database, that is, no member records.

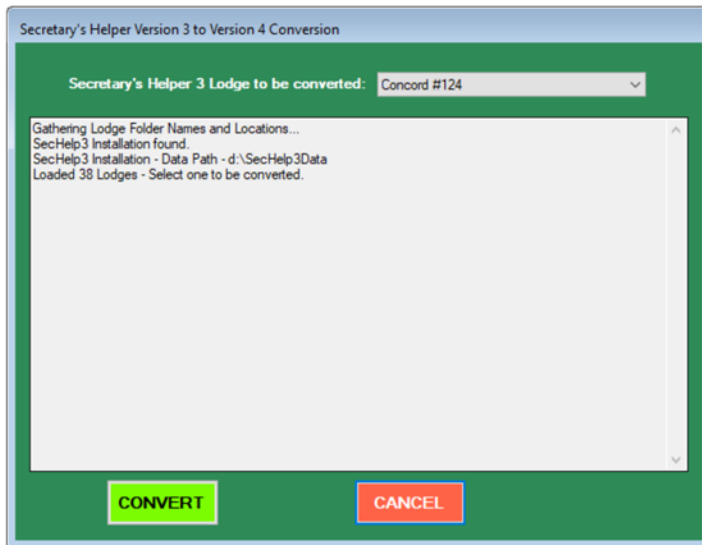
Converting Secretary's Helper Version 3 Data

To get going, you pressed the **Convert SH3 → SH4** button which was displayed in the bottom left portion of the Lodge Information screen.

This opens the first of the conversion forms.

Pre-Conversion Stage 0

The process searches for all data files which are on the computer. If it automatic part doesn't work, you will be prompted to manually select the location of the data—default was C:\SecHelp3Data



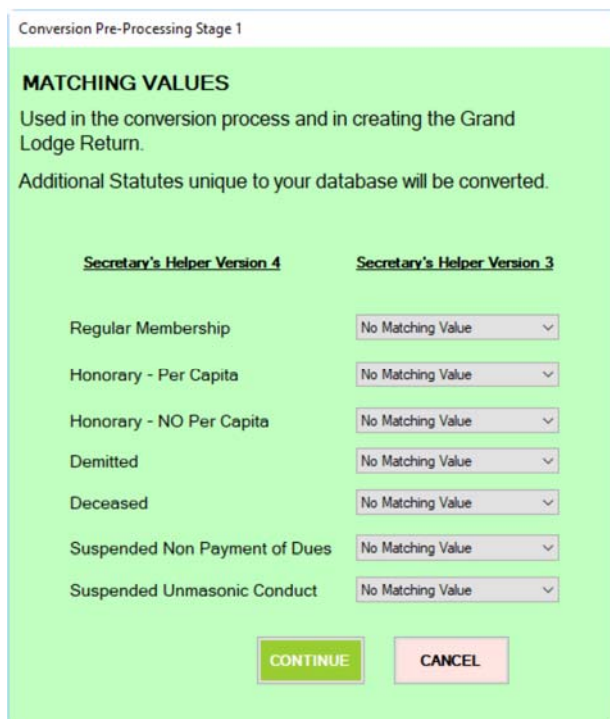
Select the Lodge to be converted and press

CONVERT

This will start the process and will open the Pre-Conversion Stage 1 window.

HINT: If you manually select the data folder and you are told they don't exist, try one level higher in the data structure tree.

Pre-Conversion Stage 1



Select the matching value for each item from the Version 3 selection.

NOTE: One per line MUST be chosen. EACH must be different. If this is not possible STOP, go back into Secretary's Helper Version 3 and fix the Statuses.

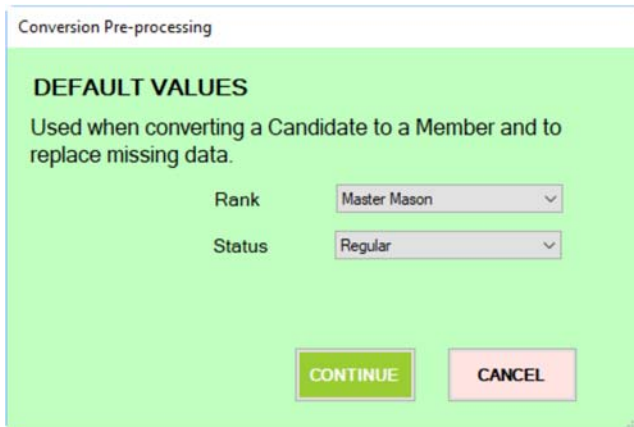
When matching is complete, press

CONTINUE

NOTE: By making this selection at conversion, you will no longer be required to enter it each time you run the Grand Lodge Membership Return (Semi-Annual)

You must now set a couple of default values.

Default Values



Conversion Pre-processing

DEFAULT VALUES

Used when converting a Candidate to a Member and to replace missing data.

Rank: Master Mason

Status: Regular

CONTINUE CANCEL

Choose the default values from the pull down lists and press

CONTINUE

The processing will now continue and you will see a log being written in the Conversion window. This log is also being stored and you may access it immediately by pressing

OPEN LOGFILE

Any data which has not been possible to write into a field will be listed and it will also be listed in either Comments or Petition Comments on the Member record.

The main variance comes from not having fields for Reading the Petition etc. in Version 4. This information is transferred to the Petition Comments for each member.

Data from Concordant bodies and related organizations is placed in Member Comments as it was not possible to convert it due to the necessity of additional information.

CLOSE

Your conversion is complete. Your Lodge Member Data is displayed.

Basic Navigation—Members

Users of Version 4 will immediately be very familiar with the interface of Version 4. There are quite a few changes: IN the grey are at the top is a pulldown menu for which items you want displayed—Active, Archived (Version 3 removed), or All. The default is “Active”.


Move your mouse across the buttons at the top, to see what they are setup for.


Only 3 tabs instead of 9.

Extra items on tab 1— Partner Relationship; Occupational Class (future statistical use); Checkbox for **Mailing List Label** (if this is checked a mailing label will be produced when requested in bulk); checkbox for **excluding member** from email List (When sending emails to members, this version generates an email for all members who have an email 1 address and who are not excluded).

When printed on a report, **phone numbers** are no longer shown as “Home”, “business” but shown if they are checked to be listed (maximum of two) and as “Preferred” and “Other”.

When printed on a report, only one **email address** is shown.

When the SMTP Server is setup in Version 4 and an email address is present, then an icon for sending an email only to that email address is shown to the right of the email address — 

Where you see a button with 3 dots, this signifies a sub-item, eg., address.  Clicking on this button opens up a screen to perform the necessary editing.

Extra Items on tab 2— Historical references, current officers, rank and status are controlled by History Events (NEW). This allows for several different things including, multiple entries for Affiliations etc. and for holding the offices of Junior Warden, Senior Warden and Master. An Asterisk (*) signifies the event took place in another Lodge (** for initiation)

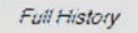
| | |
|-------------|---------------------------------|
| Joining | |
| Initiation: | Wednesday, February 03, 1965 ** |
| Recess: | Wednesday, February 24, 1965 |
| JW Year: | 1973* |
| SW Year: | 1974*, 1980* |
| WM Year: | 1975*, 1981*, 2000-2001* |

NOTE: This is a LODGE database—Affiliations, Restorations, Left Lodge Dates, etc. only refer to THIS LODGE. If you wish to keep track of information from other Lodges, use the comment fields.

Breaks in service are now covered.

| | |
|--------------------------------------|--------|
| Years of Service based on Initiation | 53 |
| Service Adjustment | 0 Days |

HINT: Especially where there are multiple breaks, I would recommend keeping details in the comment section.

 The “Full History” button opens a screen for looking at and changing the history of the member. Overall it is self-explanatory. The one caveat must be that to add a new option such as an office under “Lodge Membership”, it is necessary to go to “Tools” | “Table Maintenance” | “History Event Definitions” select the correct Event Type (pulldown at top) and do so.

Tab 3 is very similar to the one for Petitions in version 3 except that the date fields for reading the Petition and Balloting etc. no longer exist. If you wish to store this information, enter it into the “Comments re Petitions” section.

Basic Navigation—Other Changes

- All reports and labels will be found on a single pulldown menu item “Print”.
- All reports are Portrait orientation—some are two lines for each item.
- Changes to supporting tables (eg. Grand Lodge Fees) are made in “Tools” | “Table Maintenance”.
- If you compare the statistical information relative to age in Version 3 and Version 4, you will find a slight difference due to the format of calculation—Version 4 is more accurate.
- As you are now able to keep offices held for every year in a member record, you can also update your database in advance of your installation by using the correct year(s) and providing the Installation Date is properly set in the Lodge Information, your Lodge Officers will change automatically on the day following the installation.
- In “Options”, there is the facility to enable a debug log. Do not turn it on unless you are asked to do so as it will slow your program and create a sizeable log file.
- In “Options”, you can move the location of your Database. This will also move the database.
- In “Options”, there are several “Nudges” to allow for slight variations in printers.
- In “Options”, the choice of labels is limited and if more are required, they will be added.
- In “Options”, Envelope Orientation is dependent upon individual printers and the printing of envelopes may not work on all printers.
- Email Lists: The standard email lists are created using the logic of a person meeting the criteria (eg. Past Master), having an email address and not being excluded. Additional email lists may be created in “Tools” | “Table Maintenance” | “Email Lists” and individuals added to that list under “Tools” | “Email” | “Define Email Groups” (An example would be the volunteers to man the Lodgeroom at Heritage Park or Fort Edmonton).
- A Candidate form: Enter your candidate and convert him to be a member by pressing one button—works for both Initiates and Affiliates.

BOTTOM LINE

GO PLAY!

To remove an unnecessary database, just delete it from the data folder—make sure you are careful!!!