Welcome to the HT-MUMS VERSION HISTORY

(Older MUMS Version History = c:\mt2000\system\readme.rtf)

Version 24.12 Build 1. 12/20/2024 Changes for ATU Locals Only

• **ATU:** Fixed issue with using Status Code 31. Issue was that changing a member Status 10 to Status 31 (Resigned Member Still Working) showed up correctly on Coversheet but was not deducted from the Active counts for the following month.

It is recommended that locals using Status 31 to upgrade to this version and run the Step 1 of Monthend that corrects beginning counts.

Step1: Verify Report Closing Date							
📰 Adj Beg Balances	09/2024	🚖 🔦 Change					

Also locals need to remember to use 31 for members and not 32 or 33 that are for Fee Payers and Non-Members.

Version 24.10 Build 1. 10/1/2024 Changes for BCTGM Locals Only BCTGM Addon Programs (BDLDCS & BMWP)

- BCTGM-BCLDCS Updates:
 - System Control: Password required when attempting to delete the complete control records for a specific shop.

Password Dial	og		×
Enter Passwo	rd:		
	OK	Cancel	

 System Control "HELP" now presents a two page comprehensive list of options that should be reviewed prior to doing any deletes of steps or periods.

System Control	
Shop: Active	Find ? Help 👖 Close

BCLDC	S Control Record Features					
The following explains the diffe	erent results from changing Control Record Checkboxes					
 To Reset a Prelist and start it over prior to posting it: This is often done to allow for additional maintenance in MUMS before proceeding with a Prelist. 						
Uncheck the PreList Checkbox to start over	System Control Shop: 001 PreList Billing Input Edit Bal OK Post 09/22 Previod PreList Billing Input Edit Bal OK Post 09/22 Previod Pre					
Ok the warning.	Warning X					
Note: this only removes pending transactions not any posted history.	Changing the Prelist box to False will delete all existing transactions. Continue?					
 To do an additional Prelision This is done to acc prior postings for the 	st for the same period: ept a 2 nd check for the same period and NOT effect any ne same period.					
Click on the Input checkbox then click on the RESET PERIOD button.	System Control Shop: [001 F Active Period PreList Billing Input Edit Bal OK Post 09/22 F F F F F F I 10/22 F F F F F F F Active Active Period PreList Billing Input Edit Bal OK Post 09/22 F F F F F F F Reset Period Basic Options /Process Control					

- Step 1 Create/Update Prelist Billing
 - Fixed the Dues Amount on status code "B" Beck personnel.
 - Add New Member button is inactive for Canadian locals to remind them to add new members directly in MUMS. This is due to the format of the SIN number.

Payment Details

- Step 2 Update Checkoff
 - New Warning if Date Received is not within the current reporting period.
 - New Recalc Button in the heading of the Update Checkoff screen to force a recalculation of Trans Total and Balance.



- BCTGM-BMWP Updates:
 - New "HELP" button to present a review of Applying Overages to Dues

BMWP_Examples_of_Applying_Overages_to_Dues

MOST IMPORTANT NOTES:

- Total should always = Zero if applying overages to dues.
- Also the shop should be posted for the month.
- Batch ID should be YYYYMM01-SSS-OU (SSS=Shop Code)
- Batch Date must be within current reporting period and last day of the month.

xample 1: N Overa modify	Member ow ge = Dues. / the entries	wes one payment and We did not have to because total = \$0.00	Payment Month O1/31/2023 \$44	.00
,			Next Month)
ayment Details			0 /II -\$44	
Make Dues Payment Month	Amount			1
2 12/31/2022	\$44.00		(Over)/Under	
01/31/2023	\$44.00			
	1		Recalc Total \$0.00	1
			New Calculated Paid-Thru-Date	
Init Fee	ext Month		Override 01/31/2023 ~	
~		Example 2: Member	owes multiple payment a	nd
~		Example 2: Member Overage = dues. Sam	owes multiple payment a e as Example 1, we did no	nd ot
Cover)/Under	(\$88.00)	Example 2: Member Overage = dues. Sam need to alter any entrie	owes multiple payment a le as Example 1, we did nees.	nd ot
Over)/Under	(\$88.00)	Example 2: Member Overage = dues. Sam need to alter any entrie	owes multiple payment a le as Example 1, we did ne es.	nd ot
Over)/Under Recalc Total	(\$88.00) \$0.00	Example 2: Member Overage = dues. Sam need to alter any entrie	e as Example 1, we did nees.	nd ot
C (Over)/Under Recalc Total New Calculated Paid-Thru-D Override 01/31/2	(\$88.00) \$0.00 Date	Example 2: Member Overage = dues. Sam need to alter any entrie	e as Example 1, we did no es. Payment Details Make Dues Amou	nd ot
Over)/Under Recalc Total New Calculated Paid-Thru-D Override 01/31/2	(\$88.00) \$0.00 Date 2023 ~	Example 2: Member Overage = dues. Sam need to alter any entrie	r owes multiple payment a le as Example 1, we did no es. Payment Details Make Dues Amoun Payment Month Amoun 212/31/2022 \$44	nd ot
Override Ov	(\$88.00) \$0.00 Date 2023 ∽	Example 2: Member Overage = dues. Sam need to alter any entrie	r owes multiple payment a le as Example 1, we did no es.	nd ot
Cover)/Under	(\$88.00) \$0.00 >ate 2023 ~	Example 2: Member Overage = dues. Sam need to alter any entrie	r owes multiple payment a le as Example 1, we did no es.	nd ot .00 h



Version 24.08 Build 1. 8/12/2024 Changes for BCTGM Locals Only

- BCTGM: On Applicants (Status A) the Status Change now has option to change the person to "Inactive" (Status I). This to be used for Applicants that never become members.
- BCTGM: Withdrawal Card PDF that can be printed and is stored in the member's DOC tab, now only shows last 4 of SSN.
- BCTGM: Payment History Tab: Changed "Date/W/H" to be W/H Month"
- BCTGM: Individual Billing Statements: Now allows to exclude Over/Under Balances.
- BCTGM: New Standard Reports Financial Reports

 Payments by Shop (also an optional button in Monthend)

💾 Print PMT by Shop

BCTGM Payments by Shop [BCTGM Local 0081] - C ×							
Shop Option Date Range O Single Shop From: 07/26/2024 Image: All Shops To: 07/26/2024							
м « < р р и 🔛 🔛	м « < г м н 🔛 🔀						
Seq# Shop Batch-ID Date I	Rec'd Check # W/H Month #Per	Cap Dues In/Re	Fee Ovr/Und	Total Rec'd	Shop Nan	ne	

• Shop Billing Statements (also an optional button in BCLDCS)



🚳 BCTGM Billing by Shop	BCTGM Billing by Shop [BCTGM Local 0081] -								
Shop Billing Options					Concrate				
Shop:	<u> </u>								
Biling Month/Year:	:			-	<u>P</u> Help				
	Include Init Fee								
	Include Over/Under								
	Limit to one Pay	ment							
M 44 4 5 M M	Filter								
Seg# Name	Seq# Name Paid Thru-Date #Payment				Init Fee	Over/Under	Total		

• Optional Excel Output for <u>Billing by Shop</u> or <u>Payments by Shop</u>.

Close	Use the PRINT Feature in the program.	Printer Name: Brother HL-L2395DW series Printer Type: Brother HL-L2395DW series Printer Where:	Properties
Then Print bu Preview . Print Preview	tton on the	Page Range O All O Current Page Pages Enter page numbers and/or page ranges separated by commas. For example, 1,3,5-12. Print Print	s nber of <u>c</u> opies: <u>1</u> 2 2 1 2 1 2 Colla <u>t</u> e All pages in range
Here you can to File" and th type to "XLS I	request "Print en change the Data File"	Type: PDF File PDF/A-3 ZUGFeRD File Where: RTF File Word(doc) File Word(doc) Form File XLS Data File XLS Report File Xlsx Report File	tions Cancel

• BCTGM: Monthend:

 Step 1 – Reporting Date. You need to use the Change button to change a reporting period and get a password from MUMS support.

Password Dialog	×
Enter Password:	
ОК	Cancel

 Step 2 – Status Report now shows the following batch status on transactions to remind you on dues postings:

Unposted: There is an Open Batch that has been OKed but not Posted

NOTE: This will prevent you from closing the month. You will be reminded when you try to Close about any unposted dues Batch.

Open: There is an Open batch that has not been completed or OKed.

	110								
BCTGM Month End - 🗆 🗙									
Step1: Verify Reporting Period:									
07/2024 🚖 🕵 Change									
Step 2: Print Status Report									
Print Status Report									
Step 3: Print Coversheet									
Print Coversheet									
Step 4: Create Transaction File									
Create File View File									
Step 5: View Exceptions/Refunds/Adj									
View Exceptions/Refunds/Adj									
Step 6: Close Reporting Period									
Close the Month 08/2024									
<u>Exit</u> Edit/View Transactions									

Posted: Batch is Posted for this reporting period.

No Batch: No Open Batch for this reporting period for this Shop

- Step 3 New "Print PMT by Shop" feature same as found under Reports. But when pressed it reminds you to request the full month.
- Step 4 Create HQ Transactions

• Now processes all status



code changes even if there are no dues for a shop in the reporting period.

- \circ Also this step forces the proper local number in all transactions.
- Step 6 Close
 - Now this step checks all BCLDCS Batches and will STOP the CLOSE if it finds a batch that has been OKed and not POSTED.



BCTGM: Deduction History Maintenance

New Menu item *File* | *Table Operations* | *Ded History Maintenance*. This allows you to update the Dues Period and Paid-Thru-Date on MUMS Payment records. You start by entering the Control Number found at the end of the Payment History record.

		Payme	nt Hist	tory							
	Control	Number	Total I	Due	Dues Pe	eriod	I				
		282033		\$80.60	06/2024	l .					
0	You then enter this number into the new feature and it will display the Batch, the	MUN Enter Hi	IS Deduct	ion History M	faintenanc	e 628	2032		-		×
	member's name and the dates that can be modified.	C	ontrol#: Date:	06/05/2024	5282033						
0	Use OK to save your changed. You can use the NEXT button to change the next record	Dues Paid Thr	Batch: Name: Period: ru Date:	Batch 47 Washingtor 06/06/2024 06/06/2024	•]			
	in that batch.			🗸 ок	🗙 Ca	incel	▶ <u>N</u> EXT	? <u>H</u> elp)	<u>I</u> <u>C</u> lo:	se

Version 24.03 Build 2. 3/25/2024 Changes for All Locals

- ALL: When doing the Reports | Update New Reports feature, besides copying any new reports to the Custom folder, the feature will now remove any old reports starting with "Orion" that are no longer applicable to any existing MUMS users.
- ATU: Fix the Password security on change of Monthend reporting period. Now if you must change the reporting period you have to use the Change button and enter a password. You need to contact <u>Support@MUMS2000.com</u> for assistance.

	Password Dialog	×
Step1: Verify Report Closing Date Adj Beg Balances 09/2024 Change	Enter Password:	_

Version 24.02 Build 1. 2/15/2024 Changes for ATU Locals Only

NOTE: There are two major reasons that coversheet counts might not be correct: One is changing status codes with the wrong status date and the other is failure to properly close the month. Both of these issues are addressed in this set of ATU enhancements.

- ATU: New Validation on Status Changes to prevent future Monthend coversheet count errors.
 - Status Changes cannot be dated prior to Current Reporting Period.
 - Only Status Codes of 06,11-16,83 & 85 are allowed to have Status Dates > Current Reporting Period.
- ATU: On Status Change to Restatements, the Enrollment Date can be adjusted. Please note that if you change the Enrollment Date you must notify ATU HQ.
- ATU: Monthend Step 1: New Feature to adjust/repair beginning balances to fix prior count issues. Use of the new "Adj Beg Balance Button" will fix previous count issues and report the adjustments made.

	ATU Monthend Control Screen Step1: Verify Report Closing Date Adj Beg Balances	11/2023	•					
Adjust Beginning Coversheet Counts								
WARNING: You must have a good backup before continuing								
Note: The first time this run it will adjust for all prior Status Code issues.								
If this step continues to adjust counts in future months please call for support.								
	X Cancel	🗸 ОК						



You need to enter a "Y" and click on Run to run this function. The Print button can be used at any time to print out the adjustments made by this feature.

MUMS Automatic Coversheet Count Adjusted for ATU Local Performed on 11/06/2023 at 5:10:45 PM							
For Period 07/2023 beginning counts on coversheet changed as follows:							
	Active members (Line 1) Was:	942	Now:	942			
	Pensioned Prior \$2 (Line 13) Was:	9	Now:	9			
	Pensioned After \$4 (Line 20) Was:	26	Now:	26			
Note: Please Print this report and send a copy to ATU HQ with your month-end reports.							

A report will be displayed of the corrections made. It is anticipated that some changes will be made the 1st time you use this and no adjustments are expected in future monthends.

Note: When this feature changes a member's Status Code, a note will be created in the "Notes" folder to document the change of Status Code.

Note: If this feature does not run and displays an error, the program can be run outside of MUMS at C:\MT2000 folder

- ATU: Monthend Step 1: A password must be requested from support to change the Reporting Period so that a discussion can take place as to the reason to change the period.
- ATU: Monthend Step 2: Members with Status Codes of 11-16, 83 & 85 with Status Codes > current reporting period will be skipped and saved for proper month.
- ATU: Monthend Step 4: Blue sheet corrected to output Date of Death correctly based on status.

Version 24.01 Build 6. 1/10/2024 Changes for All MUMS Unions

- ALL: Protecting Notes and History Records. Additional security is established by using the existing Password Table. Changed "Codes" to "Cod/Not/His". If this option is not set to FULL, then the user cannot delete a Member's Notes or Payment History. Inquiry setting will still allow a user to view the MUMS code tables.
- Cod/Not/His None Inquiry Full

Version 24.01 Build 5. 1/5/2024 Changes for All MUMS Unions

- ALL: Status Code now displayed in Member's Heading Line.
- ALL: New Standard Member Reports:

Roster-Statistics by Status Member with Paid thru Dates and Base Wages Membership Counts by Employer

ALL: New Standard Financial Reports:
 Now Payment Papert R

New Payment Report-Batch Only New Payment Report-Details

- ALL: Eliminate "#Dues" & "Ref/Adj" side buttons not used.
- ALL: Termination Date on Financial Tab changed to Date of Death if Status 86-88.
- ALL: Eliminate unused Help menu items.
- ALL: New Reports Menu feature "Update New Reports" to be used to install new reports included with future HT-MUMS updates such as reference above.

Version 24.01 Build 1. 1/1/2024 Changes for CWA Locals Only

• CWA: Remove unnecessary Table Maintenance functions that were no longer valid.