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The Planned Giving Online Recording System has been created by The Salvation Army Australia Southern Territory, for use by Corps, Division and Territories to record weekly giving and report on personal and corporate Giving to God.

The Recording System is a simple web browser that can be used by anyone with access to the world-wide-web and an allocated User ID. Users with basic computer skills will find the program easy to use.

We believe the outcome of using this product will be:

- Accountable, confidential and secure management
- Confident corps recorders
- Informed Corps Officers
- Encouraged personal givers

This Recording System will assist your Corps in the management of congregational giving. This system will be used in conjunction with the processes and policies for managing Corps Finances, as stated in the *Orders and Regulations for Corps Secretaries and Treasurers*, which includes the requirement that at least two unrelated signatures are included on record sheets, records are kept on The Salvation Army premises and stored for 7 years.

**Territorial Planned Giving Team**

Australia Southern Territory

April 2014

Further Note:

The Australia Eastern Territory no longer uses the terminology of the Southern Territory. This manual has been prepared by the Southern Territory so it will contain their terminology. However, we have endeavoured to put next to some of these the equivalent position in the AUE Territory.

Some portions of this manual will have images from the Southern Territory Manual.
DATA STRUCTURE OF THE ONLINE RECORDING SYSTEM

OVERVIEW

DATABASE FOR TERRITORY

Within the Database for the Territory are the following data fields:

- ID *(Should never be changed - will normally be set to “1”)*;
- Description *(Name of the Territory)*;
- Operation Director *(Persons Name)*;
- E-Mail *(Operation Director’s email address)*.

The settings for the Recording System are held within this part of the database also and they are:

- Recording System Administrator E-Mail; *(Operation Director)*
- Maximum Program Years; *(1-99)*
- Application E-Mail *(the email address, that welcomes and Passwords are sent from)*;
- Help Desk Phone Number *(Information Technology Department)*

Five other unique data elements that belong to the Database for a Territory are:

- Areas;
- Users;
- Consultants;
- Reduction Reasons;
- Letter Conditions.

These 5 data elements are detailed more fully on the next pages.
AREAS

The data contained within an ‘Area’ is:

- ID (Assigned by Recording System when created);
- Area Name;
- DPGC Name (Generous Life Coach);
- E-Mail (This is the email address of the GLC).

Corps’ do not exist in the Areas data, but rather are assigned to one of the Areas through the Corps’ data. (See Figure 1.1)

USERS

The data contained within a ‘User’ is:

- ID (Automatically assigned by the Online Recording System when created);
- User Name (Preferred protocol – firstname.surname);
- Password (Automatically generated by the Online Recording System, when the User is created and emailed to the address as provided in the E-Mail data field);
- Password Question;
- Password Answer;
- E-Mail;
- Role (Access level – TPGC (Territorial Generous Life Operations Coordinator), DPGC (Generous Life Coaches), Corps Recorder, Data Entry);
- Corps assigned to.

The User data provides the mechanism to access the Online Recording System data, with the provision for multi-User access, with access level restrictions. There are four security/access levels with varying degrees of functionality. The security levels are:

- TPGC (Unlimited access to all areas of the Online Recording System);
- DPGC (Administrative access to all Corps elements as assigned, can be limited);
- Corps Recorder (Access to all Corps elements as assigned);
- Data Entry (Limited access to Corps elements that involve Weekly Giving only and no access to Family Unit data as assigned).

TPGC level Users do not require any assignment to specific Corps, because this User access level, by definition, has access to all Corps in all Divisions. All other access levels may be assigned to all Corps; however, they are usually limited to one Corps or one Division respectively.

CONSULTANTS

The data contained within a ‘Consultant’ is:

- Name.

This data item maintains a list of the names of Consultants who have provided consultancy services to Corps’ Programs. The active Consultants in this list can be selected as the Consultant responsible for a Program, when the Program is created. When a Consultant becomes Inactive, they remain on this list indefinitely. The Recording System does not allow for their removal. This is because they may be still linked to an Active Program, even beyond their incumbency. (The IT Administrator for the Recording System can remove them).
REDUCTION REASONS

The data contained within a ‘Reduction Reason’ is:

- Description *(Of the reduction)*;
- Code *(Numeric order 1 - )*;
- Display Order *(The order you wish them to appear in the reduction drop down box)*.

The above data provides the reasons that are displayed and are able to be applied, when a Family Unit’s participation is reduced. *(The reason a person changes, or concludes giving by envelope)*.

LETTER CONDITIONS

The data contained within a ‘Letter Condition’ is:

- Description *(Type of data required)*;
- SQL Condition *(SQL – Standard Query Language)*.

When a mail merge is conducted under the Correspondence menu, there are a number of merge conditions that can be applied, so that only the participants that you want are filtered into the merge. The SQL Condition determines which participants will be merged.

CORPS

This is a special data element of the Database for Territory, as in itself; it contains other data elements that belong uniquely to it.

Within the ‘Corps’ are the following data fields:

- Area;
- Corps Name;
- Address1;
- Address2;
- Suburb;
- State;
- Postcode;
- Officer’s Name *(Corps Officers)*;
- Recorder’s Name;
- Recorder’s Email;
- Planned Giving Co-ordinator;
- Phone Number.

Two other unique data elements that belong to a Corps are:

- Meetings;
- Letters.
MEETINGS

The data contained within a 'Meeting' is:

- Meeting Type;
- Description;
- Start Date *(Related to Program start, or new Meeting start during Program period).*

This data element facilitates an entry on the weekly Giving page, for open plate amounts to be applied to for the particular meeting.

LETTERS

The data contained within a 'Letter' is:

- Letter Title;
- Letter Text.

This data element is the merge letter from which mail merging is provided.

PROGRAMS

This is a special data element of the Corps, as in itself, it contains other data elements that belong uniquely to it.

Within the 'Program' are the following data fields:

- Pledge Sunday;
- Number of Years *(1-99)*;
- Projected End Date of Program;
- Start EFT (non-printed) envelope at;
- Local Cost;
- THQ Cost;
- Program Goal;
- Consultant;
- Program Status *(Current, Completed, Pending, Inactive).*

Two other unique data elements that belong to a Program are:

- Weekly Giving;
- Survey List.

WEEKLY GIVING

The data contained within a 'Weekly Giving' is:

- Giving Week;
- Giving amounts for each allocated participation envelope number;
- Open Plate Meetings Giving.
SURVEY LIST

The data contained within a Survey List, is the same as that for a Family Unit, except that the Survey List does not contain the participation data element. See Family Unit data below.

FAMILY UNITS

This is a special data element of the Program, as in itself, it contains other data elements that belong uniquely to it.

Within a ‘Family Unit’ are the following data fields:

- Salutation (Rank or any special designation eg. ‘Doctor’);
- Forename;
- Surname;
- CorrespondenceName;
- Address Line 1;
- Address Line 2;
- Suburb;
- State;
- Postcode;
- Mail (does the individual want to receive Planned Giving Mail).

The unique data element that belongs to a Family Unit is:

- Participation.

PARTICIPATION

The data contained within ‘Participation’ is:

- Participation (the type of participation that it is);
- Frequency;
- Giving Method;
- Envelope;
- Pledge Value $;
- Start Week;
- Status.
### ACCESS LEVELS TO DATA

The **access level** that is assigned to a User, will determine what data can be accessed. Other than TPGC, the data that is available, applies only to the Corps* that the User has been assigned to.

The following table shows the data that is accessible from the various access levels:

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Corps Recorder</th>
<th>DPGC (Generous Life Coach)</th>
<th>TPGC (Territorial Generous Life Operations Coordinator)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly Giving</td>
<td>Weekly Giving</td>
<td>Weekly Giving</td>
<td>Weekly Giving</td>
</tr>
<tr>
<td>Survey List</td>
<td>Survey List</td>
<td>Survey List</td>
<td>Survey List</td>
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<tr>
<td>Meetings</td>
<td>Meetings</td>
<td>Meetings</td>
<td>Meetings</td>
</tr>
<tr>
<td>Letters</td>
<td>Letters</td>
<td>Letters</td>
<td>Letters</td>
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<tr>
<td>Family Units</td>
<td>Family Units</td>
<td>Family Units</td>
<td>Family Units</td>
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<tr>
<td>Participation</td>
<td>Participation</td>
<td>Participation</td>
<td>Participation</td>
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<tr>
<td>Programs</td>
<td>Programs</td>
<td>Programs</td>
<td>Programs</td>
</tr>
<tr>
<td>Corps*</td>
<td>Corps</td>
<td>Corps</td>
<td>Corps</td>
</tr>
<tr>
<td>Consultants</td>
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<td>Territory Data Fields</td>
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</tr>
<tr>
<td>Application Settings</td>
<td>Application Settings</td>
<td>Application Settings</td>
<td>Application Settings</td>
</tr>
</tbody>
</table>

* The DPGC access level, only has access to the Corps data, to which it has been assigned. For this reason the DPGC should not be responsible for adding Corps, as even though they are permitted to by the Recording System, the Corps will not be visible to them until access is granted.
### CONTROL FEATURES OF THE ONLINE RECORDING SYSTEM USER INTERFACE

The Online Recording System, although it has the look and feel of many Web page Applications, has some icons and User interface facilities that may require explanation.

#### CHANGE DETAILS ICON

![Icon](image)

The general use of this icon throughout the Online Recording System, is to take you to the Change Details screen of whatever item you are looking at.

In a Family Unit Management screen, this means editing the name and address details of the Family Unit.

In a Weekly Giving screen, it means editing the Giving for the Corps for that week (this is helpful for EFT/Direct Debit givers when the data comes in later due to waiting for bank statements).

#### INACTIVATE/REMOVE ICON

![Icon](image)

This icon is used to make the item that you are viewing on the screen, that it is associated with, inactive. In some instances it will actually remove the item (delete it).

#### REACTIVATE ICON

![Icon](image)

This icon is used to make the item that you are viewing on the screen, which it is associated with, reactivate. This icon will only be visible for something that is inactive.

#### SHOW PARTICIPATION ICON

![Icon](image)

This icon only appears on the Family Unit Management Screen and it is used to view the Family Units participation details. This is a sub menu that behaves in the same way as the other menus in the Online Recording System.

#### SHOW REDUCTION ICON

![Icon](image)

Identical to the Show Participation Icon, except that it takes you into the reduction details screen for the Family Unit. This icon only becomes active for a Family Unit that has participation.

#### DELETE ICON

![Icon](image)
Be careful with this icon! It appears on the User menu and it allows you to delete the User from the Online Recording System (there is no “Are you sure you want to delete” prompt – once clicked, they are gone!) It also appears on the Program menu so that a completely empty program can be removed.

**BLUE TEXT**

Whenever blue text appears in the Online Recording System (for example, “Add Family Unit”) clicking on the text will do what it says. When your mouse cursor is over this, it will change to indicate that the text is active like any hyperlink in normal Web browsing.

**BOLD & UNDERLINED NUMBERS IN THE DARK BLUE BOTTOM RIBBON**

When there are more items than can be displayed on the screen, bold (white) numbers will appear in the bottom (dark blue) ribbon. The underlined number indicates the number of the current screen you are on and any others are active “clickable” links to take you to the next screen as numbered. The text behaves as described above for “Blue Text” of the indicated numbers. Because the underlined one is the current screen number that you are looking at, this text is not active and does not do anything. As below…

<table>
<thead>
<tr>
<th>125, 300 Elgin Road</th>
<th>Box Hill South - Victoria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Victoria Street</td>
<td>Box Hill - Victoria</td>
</tr>
<tr>
<td>Estella Street</td>
<td>Glen Iris - Victoria</td>
</tr>
</tbody>
</table>

1 2 3 4 5 6 7 8 9 10...

Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.
USING THE ONLINE RECORDING SYSTEM

ALL ACCESS LEVELS

LOGGING IN

To log into the Online Recording System you will need to have a User Name allocated to you. A form will need to be submitted through your Territorial Administrator (of the Online Recording System). This form contains personal details and relevant details to ensure that the Recording System is synched to you as the User and at the right level as a User.

Once this has been processed, you will be sent an automatic email confirming this. The email will include the URL to get to the login page, your Username and your Password. Also included in the email will be your unique Security Question and matching Answer, which you will need to provide, should you forget your Password and need to reset your User Account. When your User Account is reset again, an email will be sent to you with your existing Username and New Password. For this reason, it is important to keep your email address up to date with the THQ Online Recording System Administrator, should you change your email address. *(Remember some Online Recording System Users do not use Lotus Notes, but things like hotmail, gmail etc.)*

Using the URL that is included in the email, go to it through an internet browser.

The following screen will display, where you can enter your Username and Password:
FORGOTTEN PASSWORD

If you forget your Password then at the login screen click on the “Forgot your Password?” link, which will display the following window:

When you enter your User Name, the next window will display, prompting you to correctly enter the answer to your Security Question:

If you are able to correctly answer the question, the following message will display, to confirm that the login account has been reset and that you will receive via email your New Password:

If you are not able to correctly answer your security question, or your email address details have changed and so you are not able to receive the email, then you will need to contact the Online Recording System Administrator, to have your account corrected at an administrative level.
CHANGING YOUR PASSWORD

It is strongly recommended that after a Password has been assigned to a new User Account, or it has been reset, then it is changed to something that is easy for you to remember. The Password must comply with the following rules:

- Minimum length 7 characters;
- 1 Character, at least, must be a non-alphanumeric (eg. !, @, #, $, %, ?).

It is also recommended, for the purpose of maintaining a secure system, that Passwords are not something that can be guessed by people who know you. Also, do not allow Internet Explorer to remember the Password for you, since that will mean that any person who has access to your computer, will also have access to your Online Recording System User Account.

To change your Password, click on the Password menu:

The following window will appear, where you will be required to enter your current Password and your New Password twice. Then click Change Password:

Provided your Password complies with the rules, the following window will appear to confirm your Password has been changed:

Click Continue to return to the home screen.
HOME

When you log in, the screen that you see displayed is the “Home” screen. Clicking on the Home menu, returns you to this screen. For Users that are allocated to more than one Corps, this screen enables you to select the different Corps (and Divisions) that you may have access to:

Prior to the commencement of a New Program, a Pending Program will appear as a separate selection option on the Home screen under the title “Select a Programme.” Once a Program begins, the Pending Program status will be set to “Current”, so there will be two Current Programs. Care must be taken to differentiate between the two and ensure that the correct data is placed with the correct Program. (You can have two “Current” Programs for a 13 week period, while one Program is completing and one is beginning. This allows for any “late” giving to one Program, and might happen where Direct Debit needs to be added from the corps bank statement, or where a Monthly or Yearly gift is made and it falls into the ‘Old’ Current Program. It allows for a period of grace).

The Home screen allows you to see which Program is currently selected, displays data about the selected Program and enables you to choose between which Program you are actively working on:

At 13 weeks into a New Program, the previous ‘Old’ Program will be marked as completed and hidden away from the Home screen, so that it can no longer be selected (or changed).
WEEKLY GIVING

To enter the Weekly Giving, click on the Weekly Giving menu (the most common action).

From the commencement of a Program, the first Sunday after Pledge Sunday will be the first one to be available for Weekly Giving entry. Click the blue text, “Add New Weekly Giving”, to add the next weekly Giving. The Online Recording System does not allow for weeks to be skipped, since chronologically, they always exist. When there is a week where no offering is received (eg. Commissioning), a week should be added and no data recorded against it. This results in a zero offering week, where the week exists but there is no Giving data recorded against it.

If a Weekly Giving entry needs to have additional Giving recorded against it (eg. EFT), or a correction needs to be made, then clicking on the “Change Weekly Giving Details” icon, in the Action column, will open the Weekly Giving entry for editing.
The Weekly Giving Data entry screen allows you to fill in the pledge amounts against the envelope numbers. At anytime, the “Recalculate totals” button will update the totals at the bottom of the screen – This does not save the data!

The Open Plate amounts for the designated meetings are entered at the bottom of the Giving screen. Clicking “OK” saves the Weekly Giving entry and “Cancel” returns to the Weekly Giving Management Screen without saving.
For Data Entry Users, the only report that is available is the **Weekly Giving Report**. This report displays and provides the facility to printout any entered **Weekly Giving** entry.

Once you have clicked the **Weekly Giving** menu, under the Reports menu, the following screen will display:

Select the week that you wish to display/print and then click the “View Report” button.
The report will view as shown below:

![Weekly Giving Report](image)

To print the report, select “Acrobat (PDF) file” as the export format and click the “Export” text. You will then be asked what you want to do with the file that is being exported.

![File Download](image)

Click “Open” button, which will open the file on Acrobat Reader, where you will be able to print it from. Acrobat (PDF) is a document type, which presents the best, as far as overall formatting is concerned and it is easier to send via email, if required.
LOGOUT

After any work is completed, the User should always logout from the Online Recording System. As a security measure, this will time out the Internet Explorer for the Online Recording System internet pages. If you wish to logback in and do further work you will need to close the Internet Explorer browser completely before being able to logback in.

Click on the logout menu to logout.
CORPS RECORDER ACCESS LEVEL

The Corps Recorder Access Level has management access to all data at the Corps level at their Corps. For this reason, the Corps Recorder Access Level must be considered a position of trust, which requires sensitive handling of privileged information.

ADMINISTRATION

Corps Recorders are able to enter (or alter) the names of the meetings that have an offering where open plate Giving will be received. This name then appears on the Weekly Giving page, so that the open plate offering amount can be recorded for the specific meeting (by name) for that week. This assists Corps who have multiple meetings.

MEETINGS

Click on the Administration, Meetings menu to access the Meetings management screen:

From this screen, new meetings can be added, Meetings activated or deactivated:

From the above screen it can be seen that there will be two Meetings active on the weekly Giving entry sheet, for recording open plate Giving. These are: Prayer Meeting and Other.

The meeting, Family Worship, has been made inactive, which means it will not appear on the weekly Giving data entry. It could, at anytime, be reactivated by clicking on the Reactivate Meeting icon.
In the same way, the active Meetings could be taken off the Weekly Giving data entry, by clicking on the Inactivate Meetings icon (the red X). If you wish to change the details of a meeting, clicking on the Change Meetings Details icon, will provide the Meetings Detail window, that will allow you to edit the fields for that meeting.

To add a new meeting, click on the text “Add New Meeting”:

![Screenshot of Meeting Management interface]

The Meetings type can be set to the following values:

- AM1;
- AM2;
- PM1;
- PM2;
- OTHER.

The description can be whatever the name of the Meeting is *(this is what will appear on the Weekly Giving data entry)*.

The Start Date can be set by clicking on the calendar icon and choosing the date you require. This does not effect when the date appears on the Weekly Giving data entry.

Click “OK” button to save the new meeting, or “Cancel” to return to the Meetings Management screen without saving.
The Family Unit menu, is where all data is accessed that has anything to do with the Family Units activities in your Corps’ Program. The data includes: name and address details, pledge participation and envelope numbers. Every Program has its own Family Unit data and changes to Family Unit data in one Program, will not affect another.

The Family Unit Management, provides the facility to Manage the “directory” of your Corps’ membership. All details that are necessary to maintain the data that is relevant for Planned Giving recording, monitoring and pledge participation, is contained within the Family Unit Management menu of the Online Recording System.

The data from this Management menu is exportable through the Survey List menu. The purpose of this is detailed later in this manual.

To Manage Family Units, click on Family Unit Management to access the Family Unit Management screen:

From this screen you can Manage the Family Units of the Corps’ current Program, by adding new family units, making family units inactive, reactivating inactive family units, altering details, adding or altering participation and adding or altering reductions to participations:
At some point in time (after Pledge Sunday) you may wish to flag a Family Unit as Inactive. This may mean that while a Family Unit may be happy to receive the teaching material on Giving, they are not willing to participate through envelope giving in the Program. To make them Inactive, click on the Inactivate Family Unit icon (the red X) and the Family Unit will be marked with a red dot to indicate that they are Inactive. To Reactivate a Family Unit that is marked as Inactive, click on the Reactivate Family Unit icon (orange and green arrows).

To edit the details of a Family Unit, click on the Change Family Details icon.

To add a new Family Unit to the data, click on the text, “Add New Family Unit”:

Fill in the details and click the “OK” button. Clicking the “Cancel” button will return to the Family Unit Management screen without making any changes.
PARTICIPATION

Clicking on the Show Participation icon 🔄 in the Family Unit Management screen, takes you to the Participation management for a Family Unit:

The above screen will appear for a Family Unit which has not yet had any Participation allocated to it. Click on the text, “Add new Participation for [name]”, to add pledge information for this Family Unit.

When you are adding or editing Participation, the above window will display. Fill in the fields as are required.

**Note:** If, after entering an envelope number, the red text appears *(as circled above)* warning you that the number is currently in use by someone else, you must change the envelope number to another unallocated number, before you click OK. The Online Recording System will let you have multiple Family Units allocated to the same number, but this should never be done.

Even if a Participation is by Envelope Only, an amount must be placed in the “Pledge Value $” field, otherwise it is not saved. The amount should either be 0, or an estimate of what is anticipated from this Envelope Only participant. *(Currently $5 per single, and $10 per couple, unless otherwise known).*

It is important that the Start Week is set correctly, especially if a Participation is being added later in the Program. Start Weeks that are set beyond the date they are intended to begin, require administrative intervention to rectify.
Once you have the details correct, click OK, which will save the Participation and return you to the Participation Management screen:

![Participation Management Screen]

The data displayed, now shows that for the specific Family Unit, their Participation begins from Week 1. They have been allocated cartridge envelope number 3. Participating as a pledge giver, on a weekly basis by cash or cheque in the offering, for an amount of $50.00/wk. The Weekly Giving value is always shown here as being calculated per week, (so fortnightly, monthly or any other frequency of Giving will show the calculated per week figure in this place).

If any details of this Participation need to change, then click on the Change Participation Details icon.

Change the details and click OK.

If at any time the Participation was to cease, then click on the Inactivate Participation Icon:

![Inactivate Participation Icon]
Ensure that the End Week is set to the last week that the Family Unit Participated and click OK:

The Participation Management screen now shows that the Participation for this Family Unit was active from weeks 1 to 10, but is now marked as inactive (Red dot), meaning that no further weeks beyond week 10 will be able to be entered against this envelope number. While this is the only Participation for this Family Unit, this Participation can be reactivated by clicking on the Reactivate Participation icon and clicking OK. The Participation will now be shown with a Green dot and indicates the week from which this Participation commenced.

When a Family Unit requests a “change” to their Participation, this actually means, in general, that they are adding a new Participation. (They are Participating at a new level – thus, New Participation.) Click on “Add new Participation for [name of person]” in the Participation Management screen.

As before, the Participation details window will come up, where you will complete all of the required fields and click OK.

Note: A Participation Start Date can only be set to a date later than any previously existing Participation Start dates.

Once the details are correct, click OK:

The Participation Management screen now shows that the Family Unit’s participation from week 1 through to week 10 was $50.00/wk as shown in the previous example, and now from week 11, it is fortnightly, direct debit Giving of $120.00, which equates to $60.00/wk.

Essentially, this page is saying that an original participation, starting at week 1, of $50.00 per week, has now “changed” to $120.00 per fortnight, as from week 11.

Clicking on the text, “Return to Family Unit”, will take you back to the Family Unit Management screen.
REDUCTIONS

A Reduction provides the means to reduce the overall value of a Pledge. This is helpful when a Family Unit gets behind in their Giving and wishes to reduce their overall pledge value, so as to continue in their commitment without having to catch up the amount with which they are behind.

Clicking on the Show Reduction icon in the Family Unit Management screen, takes you to the Reduction management for a Family Unit:

To add a Reduction, click on the text, “Add new reduction for ...” and this will bring up the screen for entering the Reduction information as shown below:

Select a pre-determined reason from the Reason list, choose the week from when the Reduction needed to be applied and then enter the amount of the reduction. Clicking the “OK” button will save the Reduction. Clicking the “Cancel” button will exit without any Reduction being saved.
The overall value of the pledge has now been Reduced by the Reduction amount and this can be edited with the Change Reduction Details icon. The Reduction can be deleted by clicking on the Delete Reduction icon (which in this circumstance is the Red X). The weeks behind, in the reports, will now be adjusted by this Reduction value.

SURVEY LIST

The Survey List menu enables you to export the Family Unit data to an excel spreadsheet, so that mailing labels, and directory information can be utilised. To access this feature, click on the Family Unit, Survey List menu:

If a Survey List has never been run for this Program, the following screen will appear:

Although the Survey List data originates from the Family Unit data, it is a separate list. To add the Family Unit data to the Survey List, you must click on the text, “Add Family Units”.
To select all the Family Units, click the text, “Select All”, or click on each box to select those that you wish to include in the Survey List. Click OK.

The Family Units have now been transferred to the Survey List.

Note: Anytime a new Family Unit is added to the Program, it will need to be added to the Survey List as well, in order to export its data. Family Units can be excluded from the export, by clicking on the Inactivate Survey List icon next to their name (red X). To export the Family Unit Data, click the text, “Create Survey List Invitation”.
To export the entire Family Unit data that is currently in the Survey List, select “All Family Units on the Survey list” and click OK.

The following window will pop up where you can choose to either open the exported data into Windows Excel, or ‘Save’ it as a file to be opened later:

**REMOVE FAMILY UNITS**

This menu enables you to remove Family Units from the Program. Family Units who have participated in the Program with Giving data recorded against them, cannot be removed and will not be suggested as candidates for removal. To access this feature, click the Family Unit, Remove Family Units menu:
The following list of names will appear, with the reason as to why they are available for removal:

You can click the text, “Select All” to select all of the names, or click the individual tick boxes next to the names that you want removed. Click ‘OK’ when you have selected the names of those that you wish to remove.

The above screen appears, to confirm the names of those that you have selected for removal. Clicking OK will remove the Family Units from the Program.

**Note:** Be careful using this function, because the name and details will have to be completely re-entered if removed by accident.
The Correspondence menu provides simple mail merge facilities so that quarterly letters can be produced to inform Family Units of progress through the Planned Giving Program.

LETTERS

The Letters are part of the Corps’ data and therefore span across Programs, meaning that the same letter can be used over many Programs, over many years.

To access the Letters, click on the Correspondence, Letters menu:

The Letters are displayed where they can be changed, inactivated, reactivated or a new Letter can be added.

When a Letter is deactivated, a red dot appears next to its name, instead of the normal green dot. This means that the Letter will not be available for merging from the Mail Merge facility. To reactivate a deactivated Letter, click on the Reactivate Letter icon (orange and green arrows). To deactivate a Letter, click on the Inactivate Letter icon (red X). To change a Letter, click on the Change Letter Text icon.
When changing or adding a new Letter, the following screen will appear:

When adding a new Letter, ensure that a title is entered in to the Letter Title entry box at the top, otherwise the Letter will not save, because it has not been given a name.

All the merge-able fields are available to be inserted in the Letter using the “Field List” pull-down menu. Selecting a field from this list will insert it in the Letter at the current cursor position, within the text editing window. The merge fields appear as text in the Letter surrounded by the # character.

When you feel that your Letter is complete, scroll down and click the OK button to save it.

The provision of the Letter editing facility within the Online Recording System is not to provide the power of a full Word Processing system, but rather to provide the means of reporting to the Family Units, the progress of their participation in the Planned Giving Program. For this reason, the text editing capabilities of the Letter editing should always be viewed as “simple” text editing and nothing more. Provision for the inclusion of graphics, like signatures and headers, is not available; however these can be accommodated by printing these onto plain paper first by an external Word Processing system and then treating the pre-printed paper as letterhead, with the Mail Merge facility.

**MAIL MERGE**

The Mail Merge provides the ability to produce letters to the participants in the Program, which reports on their progress. This facility uses the Letters prepared (As in the previous Section entitled “Letters”) under the Letters menu. It also allows you to select which quarter you want the data extracted from, and a further selection criterion to allow you to choose which data is merged into the final resultant letters.
Although the preparation of the letter is provided through the means of a simple text editor system, the mail merge facility provides a powerful tool to selectively produce reporting letters to the Family Units participating in the Program. The Mail Merge is very reliant on a quality letter form and simple text.

To access the Mail Merge feature, click on the Correspondence, Mail Merge menu:

The following screen will appear, which has the feel of a report screen, where you can select the merge criterion:

From this screen, select the Quarter and Condition that you want the merge data to come from, and then select the Letter that you want the data merged into. Click the View Report button. The merged
letters will appear as shown below:

To view and print these letters as one letter per page, select the Export file format as, “Acrobat (PDF) file” and click on the text, “Export” next to it.

Click on the Open button and the file will launch into Acrobat Reader, where you can view each entry and print all or selected letters.
For Corps Recorder Users, there are a number of reports that are available to provide reporting capabilities of the Planned Giving data for a Corps. It must be remembered, that reports only provide feedback on data inputted into the Recording System. When giving data is entered on a weekly basis, and kept as up to date as possible, the reports will have the greatest impact for providing a well maintained and monitored 3-Year Giving Cycle.

**FAMILY UNIT REPORT**

The Family Unit Report provides details of all Family Units who are currently participating through pledge Giving or envelope only Giving. This report details: The envelope number, Family Unit Names, participation type, the original value of the participation and the current value of the participation.

This report provides the quickest method of finding the name associated with an envelope number. It also provides an ‘expected’ total weekly figure from pledge givers at the bottom of the report.

To access this report click on the Report, Family Unit menu:

The following report will be displayed:
This report can be exported in the available file export formats and printed.

**BEHIND SCHEDULE REPORT**

The Behind Schedule Report provides a detailed report of the current status of participants who are behind, measured against what they have pledged. This Report is different from all other reports found in the Recording System, in that it calculates on the most recent Sunday's date, whether the Giving data has been entered or not. This means that if the report is run before the most recent Sunday's Giving data has been entered, then participation will be behind by the amount of un-entered weeks.

This report provides the means for the Corps Recorder to identify Family Units that may require a pastoral response.

To access this report, click on the Report, Behind Schedule menu:

The following screen will appear, requiring you to select a quarter.
Select a quarter and then click the View Report button:

It is important to note the following:

- The Pledge Amount column is always calculated as the weekly value of the pledge;
- The Pledged Quarter, Given Quarter and Balance Quarter columns, are the ONLY columns that are affected by the selected Quarter;
- All other data in this report is calculated to the most recent actual Sunday.

This report can be exported in the available file export formats and printed.
The Individual Giving Report provides a 'personal statement of giving' to a participant. This is usually provided on request; however, it can also be the primary means of communicating personal giving, if required. The Individual Giving Report provides complete detail of the selected Family Unit’s Giving and participation information. It is a form of statement that replicates exactly the data that has been entered.

To access this report click on the Report, Individual Giving menu:

The following screen will appear requiring you to select an individual Family Unit.

Select an individual Family Unit and then click the View Report button:
This report details all Giving and participation for the individual Family Unit that has been selected.

The value of the pledge in this report is always calculated and displayed as the weekly amount.

This report can be exported in the available file export formats and printed.
INDIVIDUAL GIVING BULK FORMAT REPORT

This report provides the capability of producing multiple single reports, for all participants Individual Giving Reports. (This may be very valuable should a Corps Officer wish to inform all participants at the same time – as an example: Some financial crisis has occurred whereby finance locals need to indicate transparency or good accountability).

To access this report, click on the Report, Individual Giving Bulk Format menu:

Note that unlike the Individual Giving Report where you first select a participant, this report launches immediately – generating the Individual Giving Report of all participants.

Note also that there is a warning in red that the report may take time to generate, depending on the number of participants that you have in your Corps. Please be patient.

Any record (participant) can now be selected and the report can be exported in the various supported file formats for bulk printing.
The Quarterly Progress Report is a detailed report of the Corps' Planned Giving progress within a selected quarter. It presents a cumulative 'picture' over multiple quarters during the program.

To access this report, click on the Report, Quarterly Progress menu:

The following screen will appear, requiring you to select a quarter.
Select a quarter and then click the View Report button:

This report can be exported in the available file export formats and printed. The Quarterly Report provides Corps, Division and Territorial leadership, the opportunity to sign and date the report, before following their own internal operating procedures.

For formatting purposes this report should be exported in Excel. This is because the report (unscaled) is too big to fit in a single page width and will result in it being printed over 4 pages.

After exporting in Excel, go to Page Setup, and select, “1 page wide” for the “fit the printing” option.

The report will now print out as two pages or a single double-sided sheet.
The Corps Analysis Report provides a monthly summary of the Corps’ participation and Giving information, as well as graphs that show the monthly amounts over the life of the current Program. It is critical that you understand that data in the report is delayed by two months, so as to allow for any delays that annual leave and direct banking information may cause to impact upon the accuracy of the data. The delay of the data in the report, means that if you were to look at this report on the 1st of June (and any other day in the month of June) then the data displayed in this report will be for the month of April.

To access this report, click on the Report, Corps Analysis menu:

The following report will appear:
This report can be exported in the available file export formats and printed.