

Giving Online Recording System Manual – Data Entry Level

Version 2.0

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The Salvation Army

Windows User

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*Generous
Life*



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FORENOTE

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:

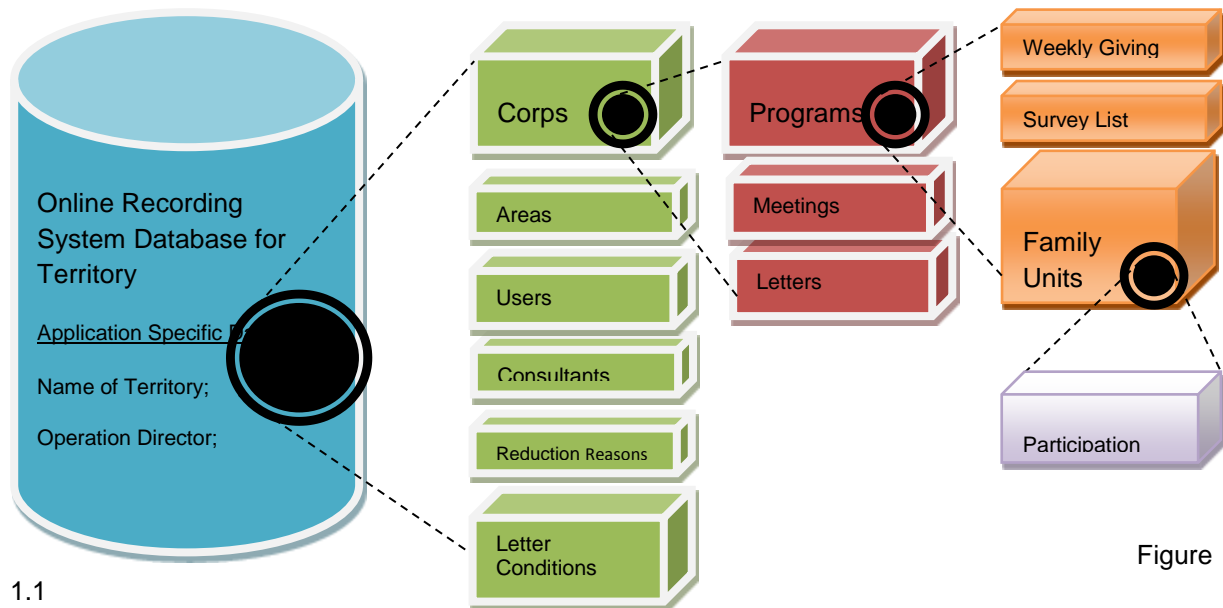
The Australia Eastern Territory no longer uses the terminology of the Southern Territory. This manual has been prepared by the Southern Territory so it will contain their terminology. However, we have endeavoured to put next to some of these the equivalent position in the AUE Territory.

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:

Data Entry	Corps Recorder	DPGC (Generous Life Coach)	TPGC (Territorial Generous Life Operations Coordinator)
Weekly Giving	Weekly Giving	Weekly Giving	Weekly Giving
	Survey List	Survey List	Survey List
	Meetings	Meetings	Meetings
	Letters	Letters	Letters
	Family Units	Family Units	Family Units
	Participation	Participation	Participation
		Programs	Programs
		Corps*	Corps
		Consultants	Areas
			Users
			Consultants
			Reduction Reasons
			Letter Conditions
			Territory Data Fields
			Application Settings

* 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



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



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



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



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



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





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...

126, 300 Elgar Road	Box Hill South - Victoria			
/ictoria Street	Box Hill - Victoria			
Estella Street	Glen Iris - Victoria			

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:

The screenshot shows a web page for 'Planned Giving Login'. At the top left is the Salvation Army logo. To its right, the text reads 'AUSTRALIA EASTERN TERRITORY PLANNED GIVING'. On the top right, there is a tagline 'Spiritual Journey to Generosity'. The main content area features a login form with a blue header 'Planned Giving Login'. The form has two input fields: 'User Name:' and 'Password:'. Below the password field is a 'Log In' button. At the bottom of the form is a blue link that says 'Forgot your password?'. The entire page is framed by a blue horizontal bar at the top and bottom.



FORGOTTEN PASSWORD

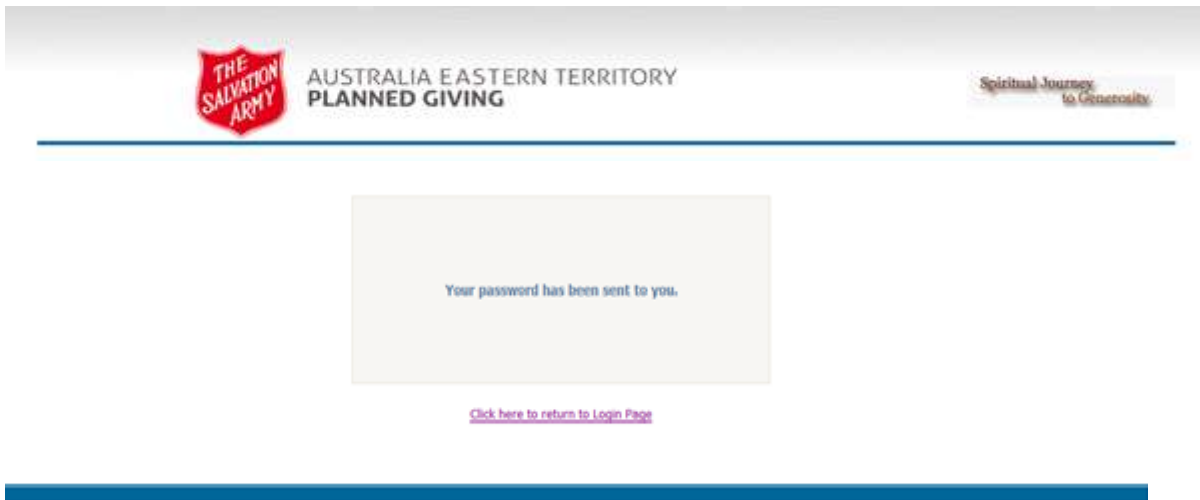
If you forget your Password then at the login screen click on the “Forgot your Password?” link, which will display the following window:



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 screenshot shows the 'AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING' website. The navigation menu includes 'Home', 'Weekly Giving', 'Reports', 'Password', and 'Logout'. The 'Password' menu item is circled in green. Below the navigation bar, there are dropdown menus for 'Select Division' (Territorial Headquarters Division) and 'Select Corps' (Booth Memorial Corps). A 'Programme' dropdown is also visible, showing 'Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 120, Last Collection: 27/05/2012'. The footer contains 'Planned Giving 4.11 - Copyright 2011 The Salvation Army, Inc.'

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

The 'Change Your Password' dialog box has a blue header. It contains three input fields: 'Password:' with a masked field of 8 dots, 'New Password:' with a masked field of 8 dots, and 'Confirm New Password:' with a masked field of 8 dots. At the bottom, there are two buttons: 'Change Password' and 'Cancel'.

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

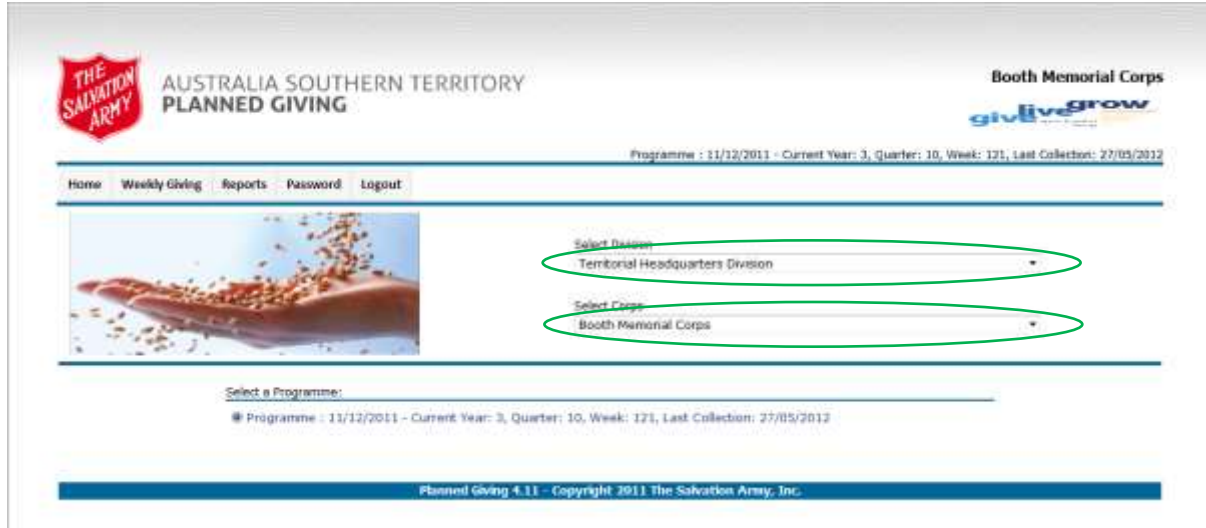
The 'Change Password Complete' dialog box has a blue header. The main text reads 'Your password has been changed'. At the bottom right, there is a 'Continue' button.

Click Continue to return to the home screen.



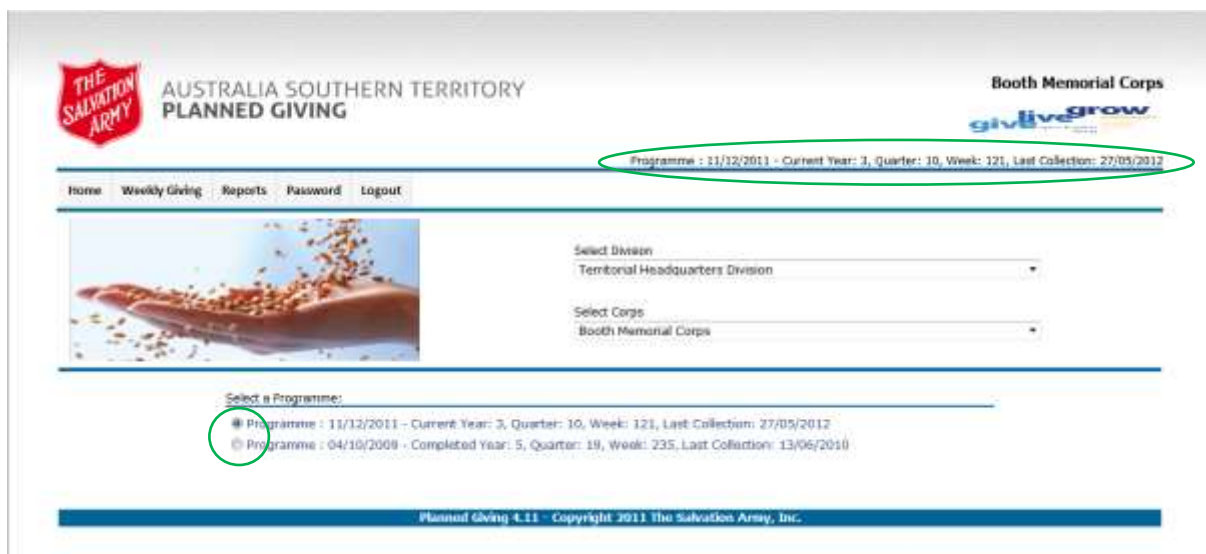
HOME

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*).

THE SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY PLANNED GIVING Booth Memorial Corps givewebgrow

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012

Home **Weekly Giving** Reports Password Logout

Weekly Giving Management

[Add New Weekly Giving](#)

Week	Start Date	Participation	Open Pledge	Reduction	Action
24	27/05/2012	\$550.00	\$30.00	\$125.00	[icon]
23	20/05/2012	\$243.00	\$100.00	\$0.00	[icon]
22	13/05/2012	\$203.00	\$75.00	\$0.00	[icon]
21	06/05/2012	\$215.00	\$150.00	\$0.00	[icon]
20	29/04/2012	\$345.00	\$150.00	\$250.00	[icon]
19	22/04/2012	\$0.00	\$0.00	\$0.00	[icon]
18	15/04/2012	\$140.00	\$102.50	\$0.00	[icon]
17	08/04/2012	\$845.00	\$24.98	\$0.00	[icon]
16	01/04/2012	\$0.00	\$0.00	\$0.00	[icon]
15	25/03/2012	\$0.00	\$0.00	\$0.00	[icon]
14	18/03/2012	\$1,685.00	\$145.55	\$0.00	[icon]
13	11/03/2012	\$402.15	\$5,000.00	\$0.00	[icon]
12	04/03/2012	\$395.00	\$640.00	\$8.00	[icon]
11	26/02/2012	\$291.15	\$130.00	\$0.00	[icon]
10	19/02/2012	\$160.00	\$60.00	\$0.00	[icon]

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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 SALVATION ARMY AUSTRALIA SOUTHERN TERRITORY **PLANNED GIVING** Booth Memorial Corps
givelivegrow

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012

Home Weekly Giving Reports Password Logout

Weekly Giving Management Recalculate Totals

Weekly Giving Details

Giving Week: Week 020 @ 29 Apr 2012

1 5.00	2 5.00	3 10.00	4 25.00
5 30.00	6 35.00	7	8
9	10 40.00	11 45.00	12
13 50.00	14	15	16
17 0.00	18	19	20
21	22	23	Envelope Subtotal: 245.00
25	26 0.00	27	24 0.00
29	30	31	28
33	34	35	32
37	38 0.00	39 100.00	36
			40 0.00
			Envelope Subtotal: 100.00
			Envelope Total: 345.00
			Prayer Meeting: 0.00
			Open Plate Total: 150.00
			Weekly Giving Total: 495.00

Family Worship: 150.00
other: 0.00

Recalculate totals OK Cancel

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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.



REPORTS

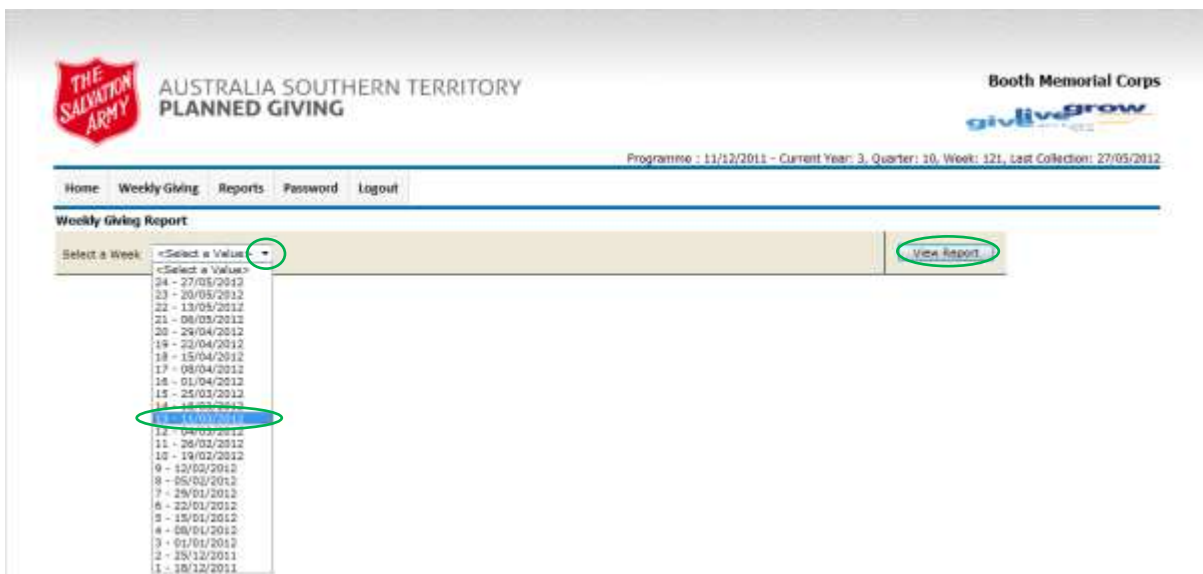
WEEKLY GIVING

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

Select a Week: 13 - 11/03/2012

Programme : 11/12/2011 - Current Year: 3, Quarter: 10, Week: 121, Last Collection: 27/05/2012

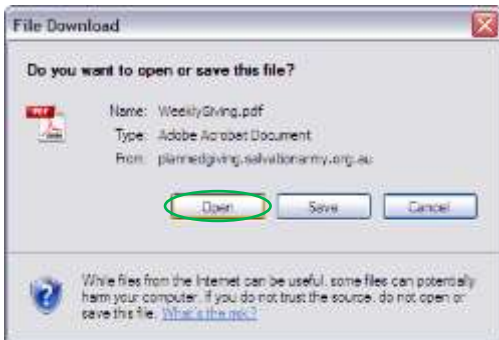
Home Weekly Giving Reports Password Logout

Select a format: **Export**

- Select a format
- XML file with report data
- Excel (containing 25 columns)
- Acrobat (PDF) file**
- HTML (web browser)
- Excel
- TIFF file
- Word

1	50.00	2	40.00	3	46.18	4	300.00
5	60.00	6	100.00	7	0.00	8	0.00
9	0.00	10	1.00	11	5.00	12	0.00
13	0.00	14	0.00	15	0.00	16	0.00
17	0.00	18	0.00	19	0.00	20	0.00
Subtotal							402.15
Total Cash							\$402.15
Total Non Cash							\$0.00
Envelope Total							\$402.15
Family Worship							5,000.00
Prayer Meeting							0.00
Other							0.00
Open Plate Total							\$5,000.00

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.



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.

