

User Guide

Version 2.2 November 2007

THE PETRA USER GUIDE SET

This guide →

- General User Guide
- Partner User Guide
- Finance User Guide
- Personnel User Guide
- Conference Management User Guide
- Financial Development User Guide
- System Manager Guide

This document is provided to assist users of the PETRA program, but Operation Mobilisation disclaims all responsibility for the use to which the both the program and the documentation contents may be put. The documentation and the PETRA program itself are subject to change without notice.

© 2007 Operation Mobilisation All rights reserved. No part of this document may be reproduced or transmitted in any form without the permission of Operation Mobilisation.

Operation Mobilisation
Information Technology Department
PO Box 27
Carlisle
Cumbria CA1 2HG
United Kingdom

Tel: +44-1228-615-100
Fax: +44-1228-515-607
Email: petra-support@ict-software.org

Document History

General User Guide				
Version	Date	Sections changed	Notes on Main Changes	Author
2.0	1 April 02	All, esp. Chs 1 & 6	Updated for version 2.0. New, more readable introduction. Changes to chapter 6 (printing)..	Ken Fitchew
2.1	1 Nov 04	1.2, 2.2.1 3.2, 4.6.3, 5.3, 7	Updated for PETRA 2.1 New chapter 7 on Caleb Export; Help system altered; continuous page numbers in User Guides; bug report added; section on short-cuts revised.	Ken Fitchew
2.2	1 Nov 07	All	Chapter 3 on basic operations updated.	Ken Fitchew

Petra General User Guide

Chapters

Chapter 1	Introduction to PETRA.....	5
Chapter 2	The PETRA User Guides	15
Chapter 3	The PETRA User Interface.....	19
Chapter 4	Introduction to Using PETRA.....	20
Chapter 5	Logging in to PETRA	29
Chapter 6	Printing from PETRA	35
Chapter 7	Exporting Data to Caleb	41
Appendix 1	Summary of PETRA Features.....	43
	Index to General User Guide.....	45

Detailed Table of Contents

Chapter 1	Introduction to PETRA.....	5
1.1	What is PETRA?.....	5
1.2	What does PETRA do?.....	6
1.3	Parts of PETRA	10
1.3.1	Partner Module	10
1.3.2	Finance Module	11
1.3.3	Personnel Module	11
1.3.4	Conference Manager.....	12
1.3.5	Financial Development	12
1.3.6	System Manager	12
1.4	Users and Access Rights.....	12
1.5	Legal and Ethical Issues.....	13
1.6	Implementation of PETRA	13
1.6.1	Organisation of PETRA Sites	13
1.6.2	System Requirements	13
1.7	Structure of the General User Guide.....	14
Chapter 2	The PETRA User Guides	15
2.1	The User Guide Set.....	15
2.2	Special Symbols and Words	16
2.2.1	User Guide Notation	16
2.2.2	PETRA Vocabulary	16
2.3	Screen Pictures.....	17

Chapter 3 The PETRA User Interface	19
3.1 On-screen Tips.....	19
3.2 Keyboard Short-cuts	19
Chapter 4 Introduction to Using PETRA.....	20
4.1 Types of Data.....	20
4.2 Typical Screens.....	21
4.3 Standard Menus	23
4.3.1 File Menu.....	23
4.3.2 Edit Menu	23
4.3.3 Find Menu	23
4.4 Entering Data in Screens	24
4.4.1 Character Sets	24
4.4.2 Date Format	24
4.4.3 Number Formats	25
4.5 Undo and Cancel	25
4.6 Help System.....	26
4.6.1 Using Help.....	26
4.6.2 Upgrade History	27
4.6.3 Reporting Bugs.....	27
4.7 Shepherds.....	28
Chapter 5 Logging in to PETRA.....	29
5.1 Preparation.....	29
5.2 Logging in.....	29
5.3 The PETRA Main Menu Screen.....	30
5.4 Logging Out.....	31
5.5 Changing Your Password	32
5.6 User Defaults	32
Chapter 6 Printing from PETRA.....	35
6.1 Overview of Printing	35
6.2 How to Print.....	36
6.2.1 Printing a Simple Report to Screen	36
6.2.2 Changing the Print Destination.....	37
6.2.3 Reprinting a Report	38
6.2.4 Batch Mode Printing.....	39
Chapter 7 Exporting Data to Caleb.....	41
7.1 Relation of Caleb to PETRA	41
7.2 To export data from PETRA to Caleb	41
Appendix 1 Summary of PETRA Features.....	43
Index to General User Guide.....	45

Chapter 1 Introduction to PETRA

1.1 What is PETRA?

PETRA is a computer-based information system, which is designed to help the administration of an international mission group working in different countries with local offices.

The purpose of PETRA is to provide a high quality information system, which will help a local office to keep control of all its information. This is important because much of the information relates to people; if they are to be treated with respect and integrity, then an office must be careful in keeping the data about them accurate and up-to-date.

Partners In PETRA, the word 'Partner' is used to describe anyone who is helping the organisation in working towards its goals. Partners include individuals who support the Organisation through gifts, churches, organisations who supply goods and services, members of staff, and internal units (sub-divisions of the Organisation).

PETRA is designed to reduce the burden of office administration and so free people's time in order that a local team can concentrate on fulfilling its main vision and aims. PETRA can help:-

- by reducing time both to enter and retrieve information;
- by providing a standard way of handling financial accounting;
- by improving 'service to the customers' (i.e. the group's Partners);
- by increasing the information available for Donor Development;
- by making it easier to transfer information from one office to another.

PETRA contains six different parts (or modules): Finance, Partner, Personnel, Financial Development, Conference Manager and System Manager. These are integrated with each other and allow the user to record and access information about Partners and perform such functions as managing accounts, mailing publications and managing personnel records for service, campaigns, etc.

PETRA is intended to be easy to use. It is helpful if new users already have some experience of using a computer with a windows-type display and a mouse, but no additional knowledge should be necessary. It has been designed for use in offices worldwide, and a later version will allow use of any language script (both Roman and non-Roman).

Because of the different languages, ways of working, etc., PETRA has been made very flexible. Many items can be changed and adapted to local needs. However, many of the additional facilities are optional; a local office can start by using the basic facilities and ignore the rest until they are needed. In some situations, PETRA will assume a 'normal' or 'default' value unless the user chooses a different one. Often the default value will be suitable and there is no need to change it.

PETRA has been developed over a number of years following consultation with representatives from all Areas and disciplines with the Organisation. As far as possible it has been made compatible with established ways of working using the existing OMSS computer system, and OMSS data can be loaded into PETRA.

PETRA is being developed and upgraded continually, to add new features and fix bugs reported by users. The development team is dependent upon users feeding back comments on the program itself and on the User Guides, so that appropriate improvements can be made in the future.

1.2 What does PETRA do?

In this section we will paint a picture of what PETRA does. This will not tell you anything about how to use PETRA, but it will introduce some of the key ideas and terms used in PETRA.

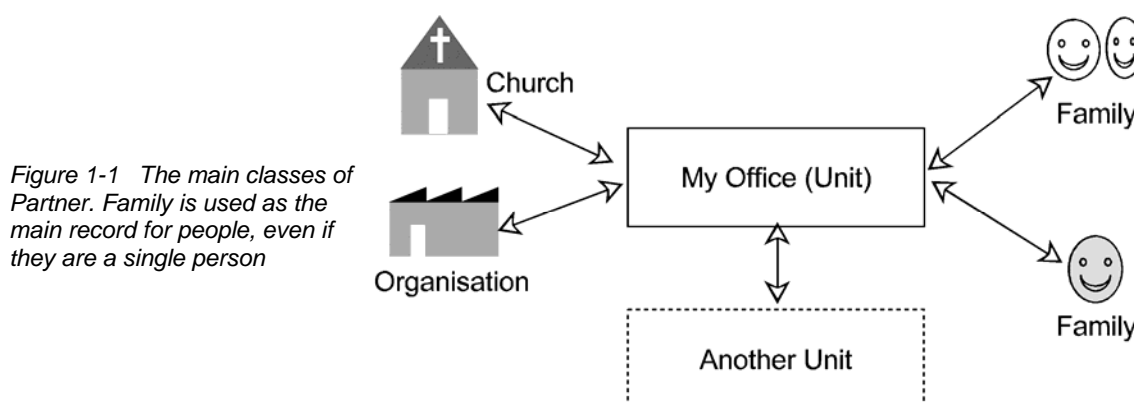
Who are Partners?

PETRA is just a tool to help manage the data used by the different offices that form part of an Organisation. The idea is that each office is basically independent, but by using the same tools, it is easy to exchange information.

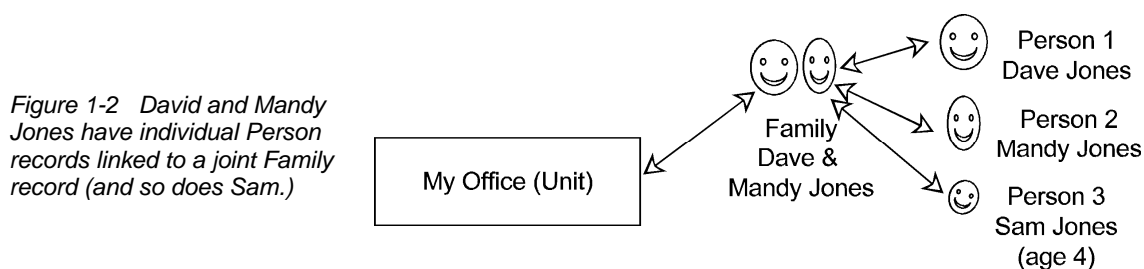
Let's look at an office. Nothing happens without relations with other people and groups, and in PETRA, everyone that the office deals with is called a **Partner**. Partners may be people or organisations. In fact PETRA uses several different **classes** of partner, since slightly different data needs to be stored for each. People are the most common, and we look at them below. Two of the classes, **churches** and **organisations** are fairly obvious (organisations include companies that we buy items from). Another common class of partner is a **Unit**, a term used to refer to the internal sub-divisions or offices of the Organisation. Your office is a Unit, and it will exchange information with other units.

People (Families and Persons!)

Finally we have people - the largest group of partners. The reason we left them until last is that people are more complicated than you might think! With many people, for example a married couple who support the Organisation, we only need basic information, like name, address and a record of donations. We treat the couple as one, and we call them a partner of class **Family**. PETRA uses this term, **Family**, even if the supporter is a single person.



However, in some situations, we need to record individual information, such as **date of birth, gender**, etc, which cannot apply to a couple. PETRA does this by using a fifth class of partner record, known as class **Person**. However, a Person record is only used for additional information; it is not the main record of the partner's address etc.



Person records are always linked to a **Family record**, so in the case of a couple, there will be two person records linked to one Family record. If they have children, there will be more. The Family

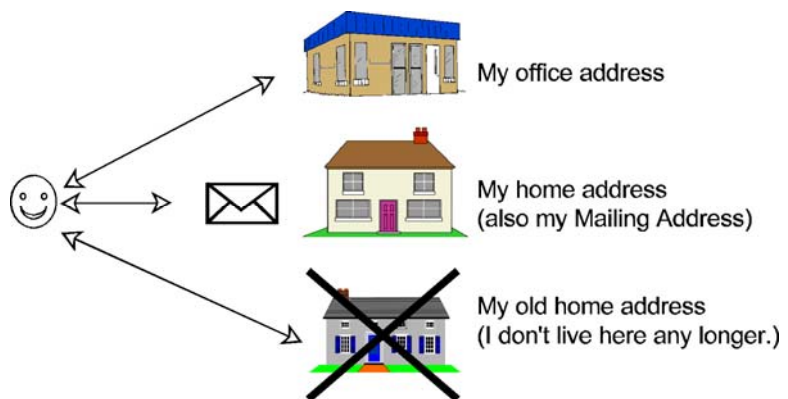
Identification or **Family ID number** is used to keep track of the different person records linked to a family.

Sometimes Partners cease to interact with the Organisation. However, we cannot delete them, because their records may be required for financial reasons, for example if they have given a donation in the past. To manage this PETRA uses the idea of **Partner Status**. Most partners will be of status **Active**, but they may be **Retired**, or **Deceased**.

Where do partners live?

We must record a partner's **address**, so that we know how to contact them. However, they may have more than one address - for example a private address and an office address. PETRA stores addresses separately from partners, and calls them **locations**. One partner can have several address locations. However, we need to know which address to send any mail to, and so we make one address the **Mailing Address**.

Figure 1-3 Petra has 3 addresses recorded for this partner, but only one is the Mailing Address.



Of course sometimes two or more partners may **share** the same address, even if they are not members of the same family (for example, several members of a team may share a house). PETRA lets you use the same address for a number of different partners.

Keeping in touch

Many supporting partners want to receive newsletters, but which ones? There may be several different types of newsletter or magazine, and these are called **publications**. You can set up **subscriptions** to publications; these are called subscriptions, even if you do not have to pay for them. PETRA will keep a list of everyone who receives a particular publication, and will help you print mailing labels to send them out.

Of course an office may want to send special letters to groups of partners, and it is necessary to keep track of who received which mailing. To do this PETRA lets you set up **Mailing Codes** to record a particular mailing event (such as sending an invitation to a particular meeting.) However, there may also be many more *ad hoc* contacts with individual partners, by letter, phone or e-mail, and you can also enter a record of these **Contacts** for future use. You can also set up **Reminders** so that PETRA reminds you to contact a partner at some future date.

Sometimes it is useful to record relationships which partners have with each other. It is possible to record, for example that a church partner is a supporter of a member partner. These **Relationships** can be recorded between any two partners, and they are not the same as the family relationships set up between an individual (person) and a family record.

Partners aren't all the same

As mentioned, it is often necessary to contact a group of partners of a particular type. How can we distinguish them? PETRA lets you record a partner of as being of a **Special Type** (or several Special

Types); so, for example, an individual partner might be a BOARD member of the Organisation, and a PASTOR, and a FORMER MEMBER (3 Special Types).

Of course, when mailing a whole group of partners, we need a means of grouping them. Sometimes we want to contact everyone who lives in a certain area, or everyone who has given a donation within the last 3 months, or who is a Pastor. You can create **Extracts**, which are just lists of partners and their mailing addresses to use for such purposes, and there are many ways to identify them. You may want to send a similar letter to every member of one of these groups, but to include each partner's particular details. PETRA can produce such 'mail merge' letters, which are called **Form Letters**.

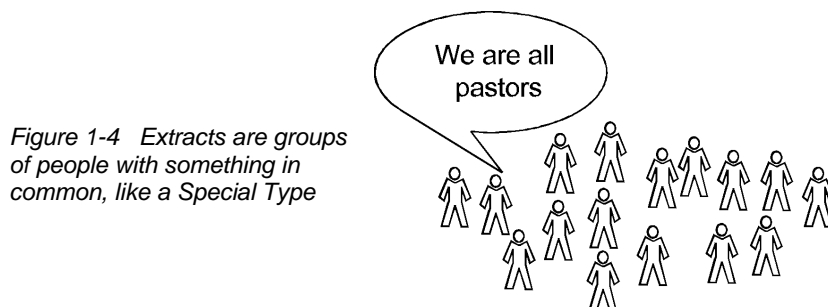


Figure 1-4 Extracts are groups of people with something in common, like a Special Type

Personnel - Joining a team

People join the Organisation in two main ways. Some send in a **short-term application** to take part in a particular short-term **Campaign**, while others send in a **long-term application** to join the Organisation for a longer period. People will apply to their **Sending Field** (normally in the country where they live), but will work in a **Receiving Field**, often, but not always, in a different country.

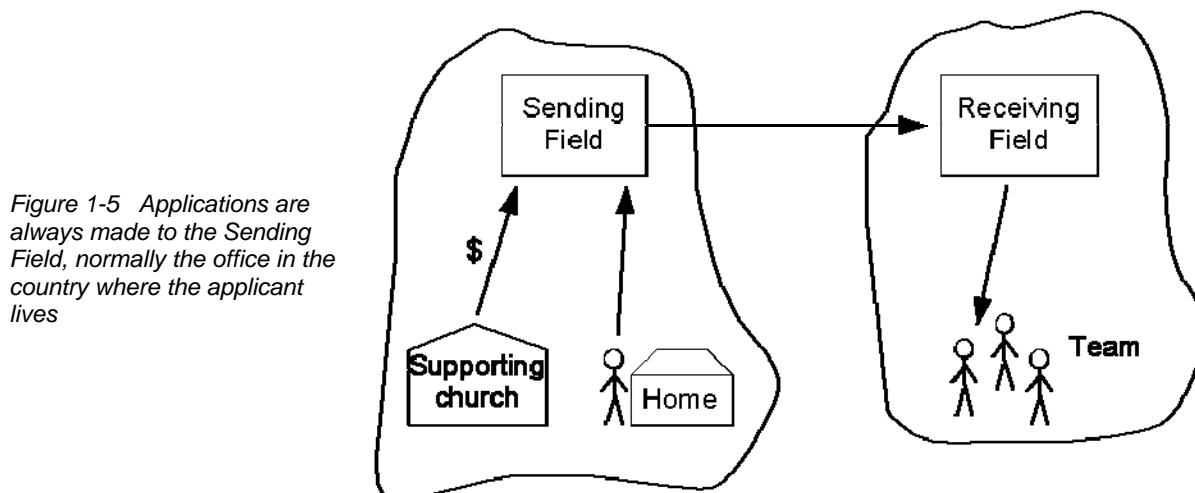


Figure 1-5 Applications are always made to the Sending Field, normally the office in the country where the applicant lives

PETRA helps the Sending Fields process these applications. In both cases it is necessary to enter a lot more **Personnel Data** (for example passport number, driving licence details, etc). You can also record an individual's **professional areas, abilities, language skills, special needs** (dietary or medical) etc.

When people join the organisation for a longer period of time need (as the result of a long-term application), it is important to record the exact dates that they will be joining a particular Unit (in this case a Field Office.) PETRA does this by creating **Commitment Records** that give the start and finish dates.

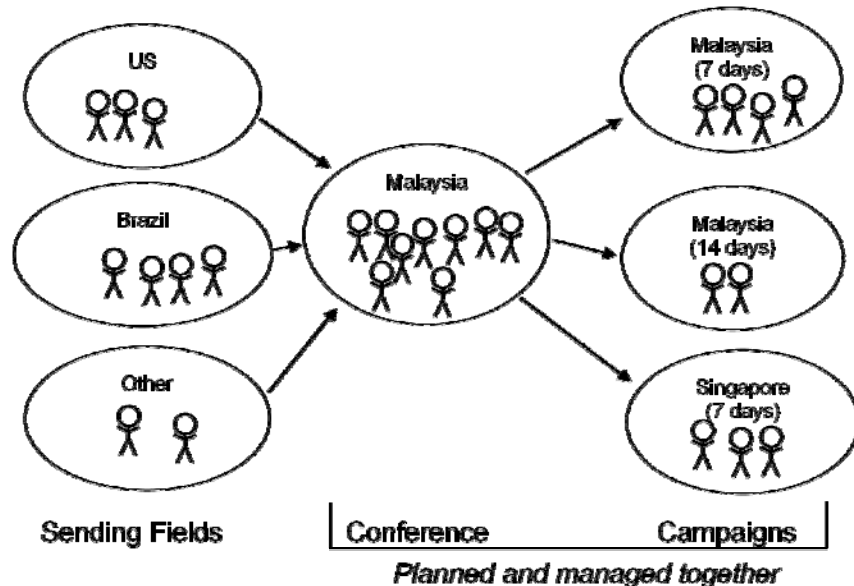
Conferences and Campaigns

Short-term campaigns usually have a **Conference** for the first few days, and people joining long-term also attend a conference. Campaigns and conferences are often called **Events** in PETRA. Application

details include **travel details**, such as **arrival** and **departure** times. Some people have a special function at a conference or campaign, such as **TEAM LEADER**, and these are called **Event Roles**.

Someone needs to co-ordinate all the applications to a particular campaign, and so home offices need to **export** details of all the partners who have submitted applications to the relevant organiser. PETRA lets you export all the relevant information into a file, which can be sent to the organiser, who then **imports** it into his/her system.

Figure 1-6 Short-term campaigns often start with a conference. The Home Offices of participants must export the applications to the Conference Organiser.



After a conference or campaign, PETRA can record that an individual has taken part in that event by creating a record of **Previous Experience**.

Organising a Conference

Actually organising a conference can be quite complicated, and so PETRA has a **Conference Management** module to help. The organiser can set up the **conference costs**, including any **discounts** for children, staff members, etc. The organiser can also set up a **Venue**, which includes details of the **rooms** available for **accommodation** at the conference site. After setting up the conference, the organiser can then **load the attendees** into the Conference Management System. You can then assign attendees to rooms for sleeping accommodation, and to **work groups**, etc. When the conference actually begins, PETRA can record **arrival** and **departure times**, print **badges** and help with arranging **local transport**. Finally it can arrange for appropriate **invoices** to be produced for the other various unit offices who sent people to the conference.

Different sorts of Unit

By the way, conferences and campaigns are actually treated by PETRA as a special sort of Unit. However, Units generally refer to the Home and Field Offices, mentioned above. These offices are actually grouped into areas, and there is a **Unit Hierarchy** showing which offices report to which others within the Organisation. For each Unit it is possible to define **Job Positions**, that is the sorts of jobs and number of people that are needed. The jobs can be described according to the **Job Abilities**, **Job Qualifications**, etc needed for that job. It is also possible to record that an individual person has been assigned to fill one of these positions, using the **Job Assignment** procedure.

Finance - Looking after the Money

A major part of PETRA is the Finance module for keeping the Organisation's accounts. Many Offices (Units) will use just one **Ledger**, for their own fund. Because the Organisation works with people from many countries, PETRA's finance system can handle multiple currencies. Many transactions are

entered in the **General Ledger**. Several separate **Transactions** are entered together in a **Journal**. A number of Journals are then entered in a **Batch**, and finally, when everything is ready, the Batch is **Posted** (which means that it is stored permanently in the system.)

Gifts are entered into the **Gift Entry** or **Gift Receipting** system, which automatically posts them to the General Ledger. The Gift Entry system allows you to enter the reason that the gift was given, and the use to which it should be put (called the **Motivation**.) Receipts will be sent to the donor for every gift, or at intervals as requested, and known as the **receipt frequency**.

Figure 1-7 Petra's Gift Entry system allows the donor to say where they wish the gift to go (the Motivation).



Finance works on a monthly cycle; when all batches relevant to a month have been posted, the **Month End Closing** procedure is completed. The closing automatically generates a number of reports. There is also a **Year End Closing** procedure.

£ → \$ → € → ¥ → ?

Because there are many offices working in different currencies, it is necessary to control the foreign currency exchange. Otherwise there is a risk that one office is changing pounds sterling to US dollars, while another unit is changing US dollars to pounds, therefore losing money in the exchange. To do this in the most efficient way possible, each month the **International Clearing House (ICH)** receives an **ICH Stewardship Report** from the PETRA system of each office, and consolidates the currency transfers in the most efficient manner.

Linked to the General Ledger is a system known as **Accounts Payable**. This is used to record all **invoices** received and the dates they are due. It can also be used to print cheques and record payment.

1.3 Parts of PETRA

Within PETRA, there are six different parts, or 'modules', which meet the different needs described in section 1.2. It is intended that further facilities will be provided in later releases of the software. Appendix 1 to this User Guide contains a more detailed list of PETRA Features.

The modules are integrated; for example, a supporter's name and address details can be entered using the Partner module, and these details may then be used in the Finance module to record a donation and issue a receipt.

1.3.1 Partner Module

This stores information about individual partners, and uses this data, for example to print address labels for all partners who subscribe to a particular publication. A partner is a person, church, organisation, internal unit of the Organisation - in fact almost any body that has an address. If you have a contact with a partner and want to record information about that contact, the partner's information is entered into PETRA. Examples of partners are donors, prayer partners, applicants to join the activities of the Organisation, churches, business contacts, debtors and creditors. The organisation's local offices are also partners, as are certain 'events', such as conferences and campaigns.

- **Partner data** PETRA can store a variety of information about partners, including address details, publications to be received, donations, and relationships with other partners (for example a church

is a supporter of a particular member). Partners can be marked as being of any number of different special types (e.g., pastor, or board member).

- **Partner groupings** Partners can be grouped into any number of different groups (also called extracts). This makes it easy to send a letter to a particular group of partners. Groupings can be based on many different types of criteria.
- **Publications** PETRA supports an unlimited number of publications and assists with preparing mailing labels for publications, both free and those with a paid subscription.
- **Contacts** An office may have many contacts with one partner, by letter, phone or face-to-face. If different people talk to that partner, it is important that details are recorded to avoid embarrassing situations (where a partner has to repeat everything to a different person). PETRA allows you to record contacts made and brief details.

1.3.2 Finance Module

The Finance system comprises a complete accounting package which allows local records to be kept in a form which is fully compatible with the Organisation's Accounting Policy. The heart of the accounts system is a multi-currency General Ledger, complemented by integrated sub-systems such as Gift Receipting. The accounts system is designed to be flexible so that changes of organisation can be handled easily.

- **General Ledger** In the General Ledger, the cost centres, account codes and account structure are defined during set-up. The General Ledger operates in a base currency and supports multi-currency transactions. Entries can be made in an on-line or a batch approach. The General Ledger is self-balancing.
- **Gift Receipting** PETRA can support single gifts, regular gifts and grouped gifts, and the production of gift reports, etc.
- **Accounts Payable** This sub-system is used to record and manage the payment of invoices.
- **Budgets** The Budget system is a tool to help generate accurate budget forecasts and to track performance against budget.

1.3.3 Personnel Module

The Personnel Module stores data on individuals working with the Organisation and new applications. In addition it records details of the organisational units, since these may relate to where individuals can work. This information is much more detailed and specific than that stored in the Partner Module.

- **Personnel information** includes education, job history, skills and abilities, areas of interest and vision, vaccinations, etc. The level of detail required depends upon the programme that they are joining.
- **Application Details** including which programme, length of time available, etc.
- **Conference and Campaign Information**, including people attending, accommodation, travel details, etc. This information is forwarded to the conference manager.
- **Current and past positions in the Organisation** This includes start and end dates and the teams in which the person worked.
- **Organisation Structure (Units)** Information can be stored on a team's job positions and recruiting and staffing needs.
- **Skills and vision** Some posts require specific skills and vision. In others they are desirable, but perhaps not essential. PETRA allows you to record the skills required for a job, and also to indicate the how desirable or necessary they are (essential or just useful).

1.3.4 Conference Manager

This module is for the use of people organising conferences. It helps you manage accommodation, groups, travel, special needs, charging, discounts, billing, etc.

- **Accommodation** PETRA stores details of a conference site (a Venue), relating to rooms available, number of beds, etc, and helps you assign attendees to appropriate rooms (male/female, family, etc.)
- **Charging** After you have entered the charges for the conference, and discounts of various types, PETRA provides details for use in charging the appropriate office of the Organisation.
- **Conference Groups** Attendees can be allocated to various types of group for activities during the conference.
- **Printing** In addition to printing reports, PETRA also prints badges and invoices.
- **Travel** Details of arrival and departure times of those attending can be printed in reports.

1.3.5 Financial Development

This module is to assist in financial planning, but providing data on donors, commitments, special funds, etc. *[This module only has limited functionality at present.]*

1.3.6 System Manager

This is a more technical module, which allows the System Administrator to set up PETRA to meet the needs of a particular office.

- **Security** Two types of security are provided. All users must log on using a pass-word to prevent unauthorised access. Secondly, legitimate users will only have access rights to certain parts of the system, or to certain functions within a part. Some users may be authorised to view information but not to change it.
- **Help System** PETRA provides an on-line help system. In Release 2, this is limited to providing information from the User Guides.
- **Printing** PETRA will print to normal Windows printers.
- **Importing/Exporting Data** Partner and personnel data can be imported from the OMSS system and imported from or exported to other PETRA sites. Files are imported or exported as text files with comma separated variable (.csv) format.
- **Reporting** Each part of PETRA allows relevant standard reports to be generated. These can be printed immediately or (for large jobs) as a batch job overnight. Reports are saved as files and can be reprinted (until old reports are deleted). Special ad hoc reports can be created and customised using the Crystal Reports package, to meet specific needs not met by the standard reports.

1.4 Users and Access Rights

To use PETRA, a User must first 'log in'. Each User has a separate User Identification (User ID) and password, which they use to log on. PETRA can be set up to run in 'single-user mode' on a small computer, or in 'multi-user mode' in which several users can log in at the same time from different computers. New users need to be set up by the System Administrator.

Not all users need to be able to use all the facilities of PETRA. In order to protect the data from being changed accidentally, and to ensure confidentiality where necessary, users can only access those modules that they need to use. These access rights are set by the System Administrator.

1.5 Legal and Ethical Issues

It is essential that local offices consider how they use PETRA, in order to meet local legal requirements. Since PETRA holds information about people, it is also important to ensure that they are treated with respect and fairness. The following examples explain typical issues.

- **Data Protection** In many countries, laws exist to protect the rights of individuals from the abuse of data held on computers. One result of this is that partners may need to be told that data about them is held on computers. If they request it, they must be given a copy of that data. PETRA provides a special facility to print out this sort of report (the Partner Full Report described in the SYSTEM MANAGER USER GUIDE). Care should also be taken that everything entered about a partner is accurate and polite. Quite apart from the legal implications, the values of the Organisation demand respect for and courtesy to be shown towards individuals.
- **Confidentiality** Partner data is held by the office strictly for the use of the Organisation. The use of an information management system such as PETRA makes it very easy to produce lots of reports, but these must be kept in an appropriate level of confidence.
- **Accuracy** In order to show respect to Partners, it is important to enter data carefully, and to give consideration to all requests, whether they come by letter, phone, visit, etc.

1.6 Implementation of PETRA

1.6.1 Organisation of PETRA Sites

The PETRA system can be adapted for different types of organisation structure, but it is intended to be suitable for an organisation with many different regional offices or 'Fields'. Key parameters are defined centrally, but each office can run individually. Updates to the programme are distributed from the central design department. Some types of data can be exported from one site and/or imported into another when required (for example data on partners, gift batches and campaigns).

Usually each Field will operate as an individual site, with its own copy of PETRA. Each Field is defined as being a PETRA **site** and is given a unique series of numbers. The site uses numbers from this range to give a unique **partner key** to each partner registered at that site. Large Fields or those which have a range of activities may need to operate with different **regional offices**, each of which will operate as an independent site. The System Manager module allows this to be set up as required.

1.6.2 System Requirements

PETRA is run on an ordinary desktop PC using Windows 98SE or later. It can be run either from a stand-alone PC in single-user mode or from a PC connected to a network server running OM Linux, where several users can log in simultaneously.

Warning If using Windows XP, it is recommended to change the Windows display settings to Classic style. If this is not done, the additional width of XP menu bars, etc causes PETRA not to display properly.

For the network version, the requirements are as follows:

Requirement	Network Server	Network Client	Stand-alone
Operating System	OM Standard Linux 1.4 or above	Micorsoft Windows 98SE, Me or XP Professional	Micorsoft Windows 98SE, Me or XP Professional
Processor	200 MHz Pentium	100 MHz Pentium (200 MHz recommended)	166 MHz Pentium (200 MHz recommended)
RAM	128 MB (256 MB recommended)	128 MB (256 MB recommended)	128 MB (256 MB recommended)

Requirement	Network Server	Network Client	Stand-alone
Free disk space	1 GB	100 MB	400 MB
CD-ROM drive	Yes	Yes	Yes

1.7 Structure of the General User Guide

The contents of the GENERAL USER GUIDE are arranged as follows:

Chapter 1, Introduction to PETRA, explains what PETRA does and how it can be used.

Chapter 2, The PETRA User Guides, introduces the different User Guides (of which this volume is one part) explaining some of the special words used.

Chapter 3, Basic Computing Operations in PETRA, provides an introduction to using computers with windows and a mouse

Chapter 4, Using PETRA, introduces typical operations that will be necessary to use PETRA, as an introduction to the type of procedures necessary.

Chapter 5, Logging on to PETRA, explains how to log on and off from PETRA

Chapter 6, Printing, give instructions for printing reports (this section is essential for printing reports from all modules of PETRA).

Chapter 7, Caleb Export, explains how to export partner data to the Caleb system (a separate IT support system which provides up-to-date information on financial support and special roles for members of the organisation.)

Appendix 1, Summary of PETRA Features, provides a more technical description of PETRA.

----- End of Chapter 1 -----

Chapter 2 The PETRA User Guides

The PETRA User Guides aim to provide a reference for all users of PETRA in order to explain what it does and how to make it do what you want. However, PETRA is only a tool to assist a local office; it is not an Office Manager, and it is not the role of the User Guides to explain good office practice. Occasionally the User Guides offer advice on how PETRA might be used, but it is important for an office to develop local procedures to complement the information in the User Guides.

2.1 The User Guide Set

The PETRA documentation (User Guide) is arranged in 5 parts, corresponding to the different modules (one additional module is still being developed):

1. **GENERAL USER GUIDE** (the one you are reading) provides a general introduction to PETRA, and includes essential information to help a new user get started. It also includes some information that is common to all the other parts, such as printing a report.
2. **PARTNER USER GUIDE** explains how to enter all names and addresses used by PETRA, in particular all applicants, churches, donors, prayer partners, and other organisations. This is also where subscriptions for publications are entered and relationships between partners are recorded, e.g. a (person) partner being the pastor of a (church) partner. The PARTNER USER GUIDE also explains how to send form letters. This volume will be of interest to all PETRA users.
3. **FINANCE USER GUIDE** explains how to use all the financial accounting functions of PETRA, e.g. tracking income and expenditure with a main focus on gift entry and financial reporting. This volume is for bookkeepers, accountants and others with a financial responsibility in the Field.
4. **PERSONNEL USER GUIDE** explains how to enter information regarding applicants to join campaigns and existing members, and also internal Units. This volume is for those involved with recruitment and personnel management, including sending people to campaigns.
5. **CONFERENCE MANAGER USER GUIDE** explains how to use the conference manager module in setting up and running conferences. In general this will only be used by a small number of experienced personnel users.
6. **FINANCIAL DEVELOPMENT USER GUIDE** will describe how to use PETRA to strengthen relationships between donors and prayer partners by tracking their particular interests and involvement with the Organisation in the past. For example it will show how to track those with an interest in a particular Field, type of work or individual member. This volume is aimed at those involved with public relations and partner development.
7. **SYSTEM MANAGER GUIDE** explains how to add new Users to PETRA and to control which parts of PETRA they are allowed to use. It also explains how to manage other technical aspects of the system. This part will be of interest to those responsible for managing PETRA and the computer systems.

Each User Guide is divided into a number of chapters. In each Guide Chapter 1 introduces the module and gives an introduction to the contents of that User Guide.

At the end of each User Guide there is an index for that Guide. At present there is no overall index.

2.2 Special Symbols and Words

2.2.1 User Guide Notation

The User Guides use different type-faces and styles for special purposes.

Format	Use
Bold type	For the names of data fields on the screen in which you type data, for example, First Name
<i>Italic type</i>	For the name of a screen, for example <i>Partner Edit Screen</i>
Courier type	For the names of menus and for choices within those menus, and for command buttons
<brackets>	The name of a key on the keyboard, for example the <Enter> key
Button	A box round the text is used for the names of buttons on screen.

In each User Guide, the pages are numbered continuously through the document, but the figure numbers refer to the chapter they are in. For example, in Chapter 3 of a User Guide, the diagrams are Figure 3-1, Figure 3-2, etc.

2.2.2 PETRA Vocabulary

A general glossary of Information Technology terms is available in all offices, and this explains many of the terms used in the User Guides. A number of special terms are used in this manual to refer to parts of menus and screens. These are introduced in Chapter 3 of this Guide.

A small number of words have special meanings in PETRA. These are usually explained in the different User Guides, but the following list gives some of the more important ones.

Words with a Special Meaning in PETRA	
Class	Used to distinguish different sorts (or classes) of partner, e.g. churches or people. See the PARTNER USER GUIDE.
Edit	To change data which has already been entered into PETRA. See also Maintain.
Extract	An extract is a small list of items which has been 'extracted' (or taken) from the complete list. For example, from all the partners living in a country we may wish to make a list of just those living in one city. This shorter list is an extract.
Family	Used to indicate all people who are partners, individuals as well as couples. See the PARTNER USER GUIDE.
Maintain	To maintain an item means to alter it in some way to bring it up to date. Sometimes this means the same as to edit it. However, in a few cases there is a difference. For example in a list of partners, 'maintaining' the list means adding or deleting partners; 'editing' the list means altering the name or description of the list.
Motivation	The purpose for which a donation is to be assigned.
Partner Key	A number such as 0035100034 which is different for each partner. PETRA uses the numbers to organise the data.
Person	Special class of partners who are individuals and have extra information stored, in addition to that entered in their 'Family' record. See the PARTNER USER GUIDE.
Shepherd	An automatic sequence of screens to help guide the user through complex data entry.
Table	A standard list of codes and their meanings. For example, The Language Table lists codes such as AF, AR, etc for Afrikaans, Arabic, etc. These lists give fixed choices, but can usually be altered by local offices to meet their needs.

2.3 Screen Pictures

The User Guides include many pictures, which illustrate what you see on the computer screen. These may not appear exactly as you see them on your computer for two reasons.

- New screens will usually appear blank, and you must begin by filling in all data. In the User Guides, screens are often shown with some typical data already entered.
- Slight differences may result from the settings on your computer (in particular some items on the screen may appear grey or white depending upon the Windows settings as set under Control Panel/ Display/ Appearance).
- For many screen shots in the user guides, the height of the screen has been reduced, by partially cropping blank portions of the screen. This is to save space and so reduce the number of pages in the printed version.

----- End of Chapter 2 -----



This page is blank

Chapter 3 The PETRA User Interface

It is assumed that users of PETRA will be familiar with the basic interface of typical applications running on a Windows or Macintosh type of computer. However, there are a few points that it is good to be aware of.

3.1 On-screen Tips

In some screens, PETRA includes “context-sensitive” advice on what should be entered in a field. This is mainly done by use of the prompt bar, at the bottom of the window. When you click in (or tab to) a data field, the prompt line at the bottom of the screen suggests what to do for that field.

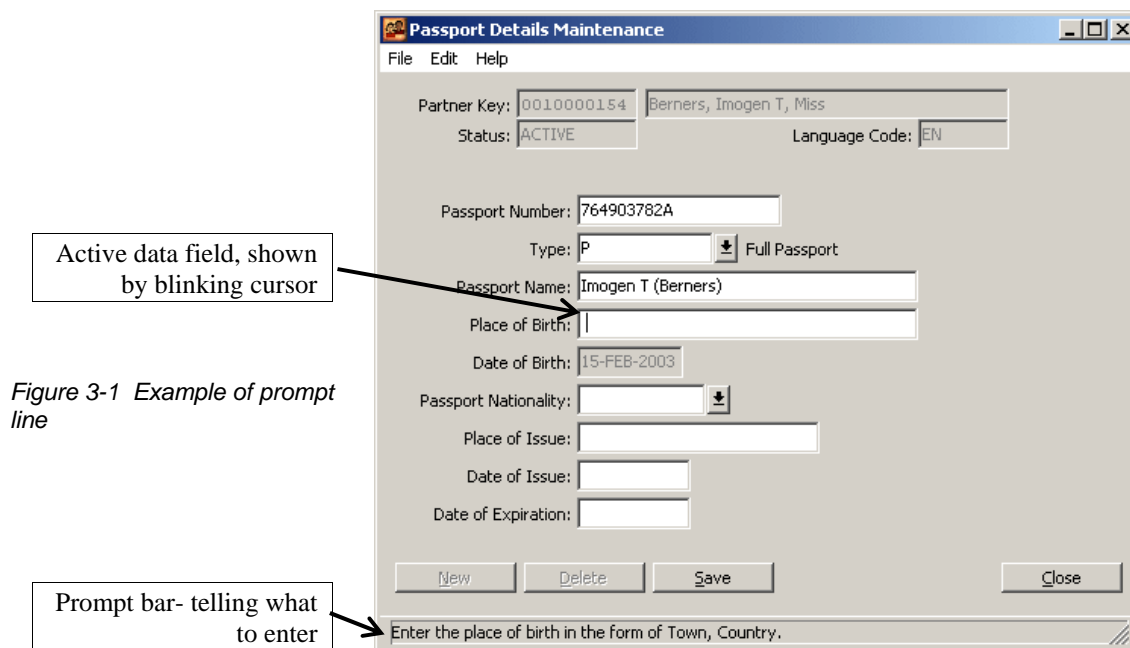


Figure 3-1 Example of prompt line

A few of the more recent screens also include a ‘Tool Tips’. This is information which appears when you use the mouse to ‘hover’ over an item without actually entering anything.

3.2 Keyboard Short-cuts

For almost all operations, you can use the mouse to click in the data field which you wish to edit. However, it can be quicker to work from the keyboard, and there are several ways to use the keyboard to move around on the screen.

- **Moving between data fields (<Tab> key)** When a screen contains several blank fields, you can move between the fields either by clicking with the mouse or by using the <TAB> key to move you to the next field. <SHIFT> + <TAB> moves you back to the previous field.
- **Entering data** When you have finished entering all data in a screen, use the <Enter> or <Carriage Return> key. You can often use this key instead of the <TAB> key to move you to the next field, but there are a few situations where the effect is different e.g. in the *Find Screen*.

Warning – Entering Data When you enter data into a field, it is often necessary to use the <Tab> key to move out of that field before you can Save. PETRA cannot save unless it is clear that you have finished entering data in a field.

- **Moving up and down a list** Instead of the scroll bars, the **cursor keys** on the keyboard (↑ ↓ ← →) can be used to move up and down a list. Select any item in the list and then use the cursor keys to move up or down. The item currently selected is highlighted. To move up and down a list more rapidly, use the <Page Up> or <Page Down> keys.

Tip - Scrolling Long Lists When there is a long list, PETRA can take a long time to scroll to the end of the list, and the slider on the scroll bar seems to be stuck at the bottom, even though it is not the end of the list. Use the <End> key to go directly to the end of a list. This loads all entries quickly, and the scroll bar slider then works effectively.

- **Short Cuts** Many items on a screen are marked with one letter underlined. This shows a keyboard short-cut. If you hold down the <Alt> key and type the underlined letter, the effect is the same as clicking with the mouse on that item.
- **Drop-down Menus** Some button menus allow you to type the code directly into the box beside the button. In others, typing the first letter is an alternative to scanning the list and using the mouse to select. (Type more than once if there are several options with the same first letter).
- **Copy, Cut and Paste** In Edit screens, it is possible to select text and then to copy it, cut it and paste it elsewhere using the standard Windows key combinations:

Copy <Ctrl> + C

Cut <Ctrl> + X

Paste <Ctrl> + V

----- End of Chapter 3 -----

Chapter 4 Introduction to Using PETRA

The other User Guides give detailed instructions for using the various PETRA modules. However, there are several items which are common to all modules, and this chapter explains some of them.

4.1 Types of Data

PETRA is a database that allows you (1) to enter items of data, (2) to organise them so that they are linked together and (3) to use them to produce output. For example you may enter names of people and gifts of money, link them together to show who gave the gift and who it is to support, and use the data to produce reports and receipts and address labels to send the receipts.

The various screens and menus help you do all this. There are two types of data that you may input. First there is 'free' data like a name, which can have any spelling, or an amount of money, which can have any value. Secondly there are items where you must choose one from a set of possibilities, such as a list of publications. Normally there is a special menu with a list of codes to make this easy. Each list of choices is kept in a **table**. Some of these lists are fixed, but most can be modified to meet the needs of a local office. Free data is normally typed into an empty box. Fixed choices are often selected using drop-down button menus which show the list of possible codes.

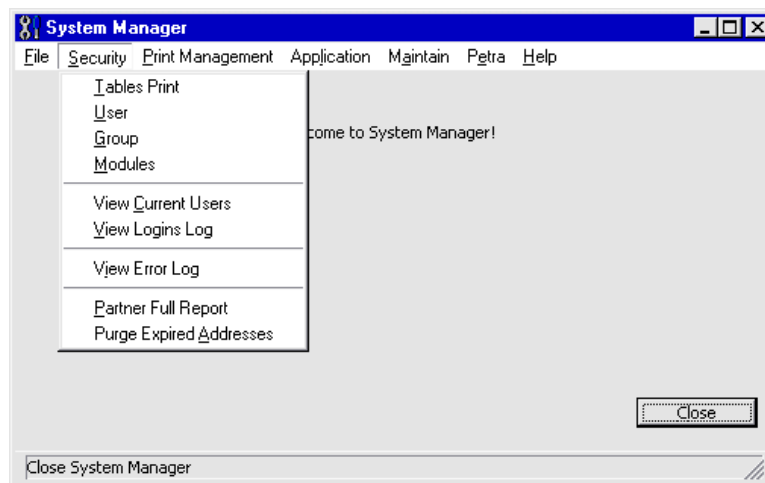
4.2 Typical Screens

PETRA has many different screens for different operations, but there are a few standard types of screen which are often used.

Menu Screen

Each module opens with a welcome screen, which allows you to select the required operation. As an example, the *System Manager Welcome Screen* is as below. This type of screen just offers menus to move to another screen.

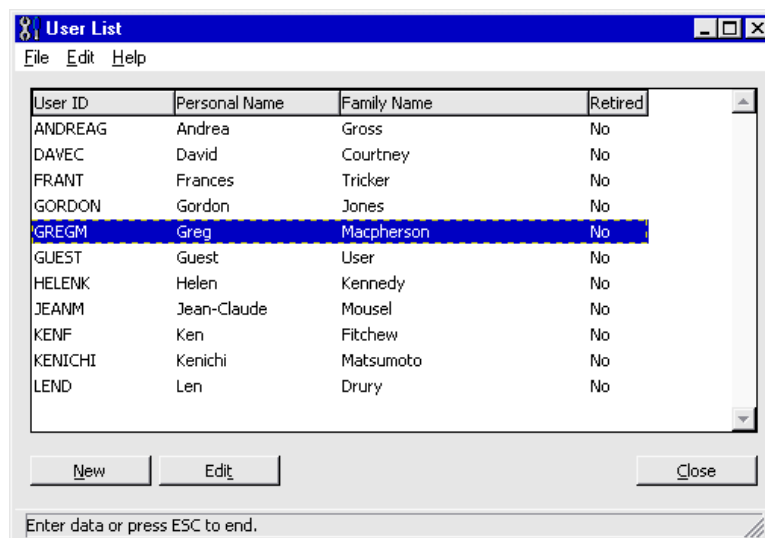
Figure 4-1 Welcome screen for System Manager Module



List Screen

If you select *User* from the drop-down menu in the example in Figure 4-1, you will see the *User List Screen* (Figure 4-2). List screens offer a list of items that you may wish to edit. Their purpose is to allow you to choose one from a list of items.

Figure 4-2 List Screen showing a list of users



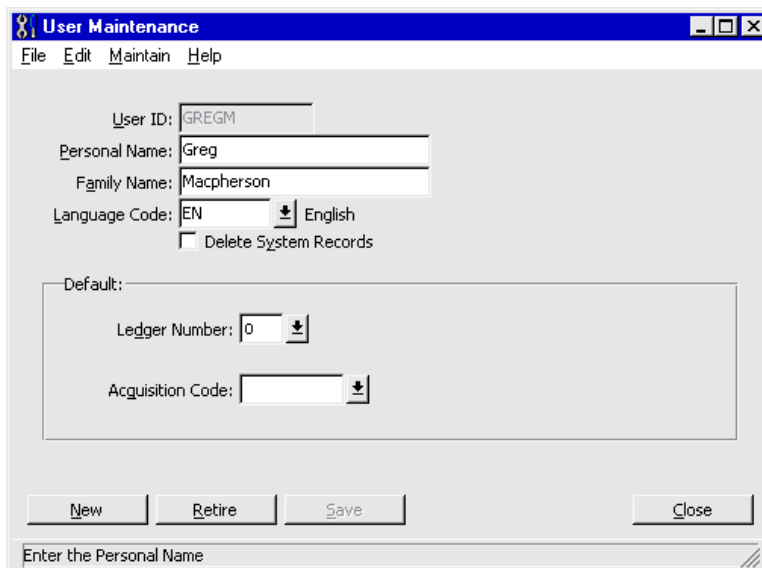
In this type of screen, you select from the list the user whom you wish to edit, by using the mouse or cursor keys. Then click the **Edit** button. To add a new user, click the **New** button.

In many list screens it is possible to resize the window, resize individual columns or drag columns to a different place, making it easier to see all the information that you are interested in.

Maintenance Screen

Maintenance and Edit Screens display data that you can change. They are blank if you are entering new data, or display existing data for you to change. If you select a user from the list screen in Figure 4-2, and click the **Edit** button, you will see data that can be edited, as shown below. On some screens, when you click in a field to make it active, the prompt bar at the bottom of the screen tells you what to do.

Figure 4-3 Maintenance Screen for entering or changing data



The 'User Maintenance' window has a menu bar with 'File', 'Edit', 'Maintain', and 'Help'. The main area contains the following fields and controls:

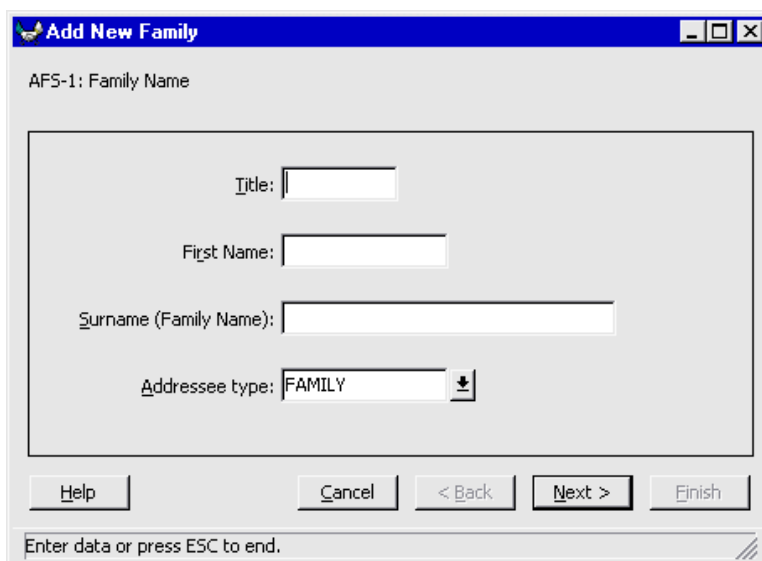
- User ID: GREGM
- Personal Name: Greg
- Family Name: Macpherson
- Language Code: EN (dropdown menu showing 'English')
- ☐ Delete System Records
- Default:
 - Ledger Number: 0 (dropdown menu)
 - Acquisition Code: (dropdown menu)

At the bottom are buttons for 'New', 'Retire', 'Save', and 'Close'. A status bar at the very bottom says 'Enter the Personal Name'.

Shepherd Screen

In order to help you through some processes (such as entering a new partner) PETRA includes a few Shepherds. When you start a shepherd, it guides through the necessary steps, making sure that you do not miss out any essential information. Once you open start following a shepherd, you are presented with each screen in turn. After entering data on a screen, you can go on to the Next screen; you can also go Back to the previous screen to check or amend data that you have already entered. These screens therefore have buttons marked **Next >** and **< Back**. For more information on Shepherds, see section 4.7, page 28.

Figure 4-4 A Typical screen from a Shepherd, showing the Next and Back buttons



The 'Add New Family' window has a title bar with a small icon and the text 'Add New Family'. The main area contains the following fields and controls:

- AFS-1: Family Name
- Title: (text field)
- First Name: (text field)
- Surname (Family Name): (text field)
- Addressee type: FAMILY (dropdown menu)

At the bottom are buttons for 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'. A status bar at the very bottom says 'Enter data or press ESC to end.'.

4.3 Standard Menus

Several menu items are present in the Menu Bar of almost all screens, namely File, Edit, Menus and Help.

4.3.1 File Menu

The File menu normally has only two options:

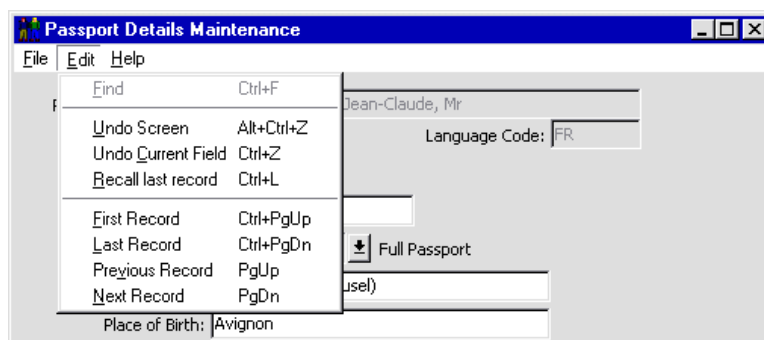
- **Print** will print the data shown on the screen as a report (see Chapter 6, 'Printing').
- **Exit** provides a quick way to close the screen without saving any changes that have been made.

4.3.2 Edit Menu

The contents of the Edit menu are different for different screens. However, it often allows you to undo data entry before the screen is saved. More importantly, it allows you to move up and down a list making changes to a number of items without having to return to the list screen to select the next item. Figure 4-5 shows a typical Edit menu, and the options are explained below. In this case, the partner can have several passport records, so Next Record means go on to the next set of passport details.

The figure shows keyboard short cuts (Chapter 3, section 3.2) alongside the menu items.

Figure 4-5 A Typical Edit Menu from the Menu Bar



The various menu items are in three groups: a find facility; options for undoing; and options for moving up and down a list.

Find Opens a Find screen to help you find a record (see section 4.3.3).

Undo Screen Undoes all the unsaved changes that you have made to the screen displayed

Undo Current Field Undoes the changes that you have made to the active data field

Recall Last Record Brings back the last record that you were working on

First Record Goes to the first record in the list

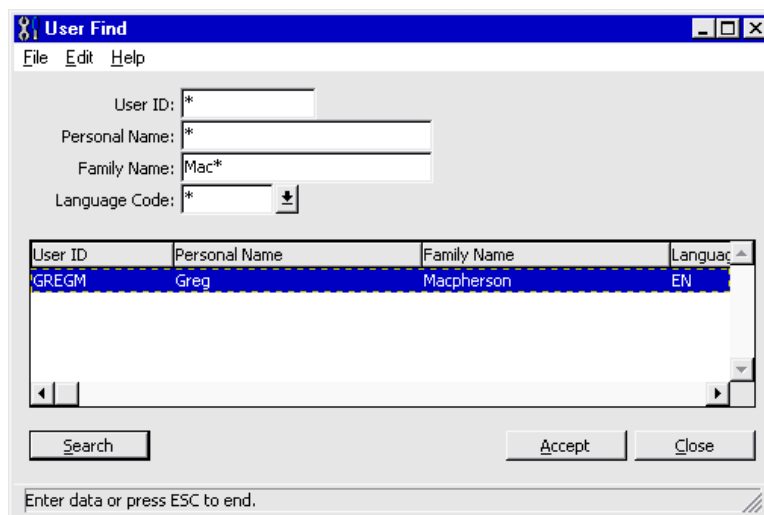
Last Record Goes to the last record in the list

Previous Record Goes to the record which is before the current one

Next Record Goes to the record which is after the current one

4.3.3 Find Menu

For many List Menus (see for example Figure 4-2), there is a Find facility (available from the Edit menu on the Menu Bar). This helps you find an item in a list if you are not quite sure of the exact spelling. If you click on this menu item, you see a Find screen as follows:



User ID	Personal Name	Family Name	Language
GREGM	Greg	Macpherson	EN

Figure 4-6 Find Screen for Users

This screen allows you to search for any user, by entering the data that you are sure of. For example, you might want to find a user called Elizabeth, but you don't know her family name. Type 'Elizabeth' in the **Personal Name** data field, and click the **Search** button. A list will appear in the lower box of all users with the personal name Elizabeth. You can then highlight the correct one and click the **Accept** button.

The wildcard '*' represents any characters, and can be useful if you are not sure of the spelling. For example, you might not be sure whether the name is spelled 'Elizabeth' or 'Elisabeth'. In the personal name field type '*beth'. The Find facility will then find all users whose personal name ends in '-beth'.

4.4 Entering Data in Screens

There are several different types of field in which you enter data (the blank boxes on a screen). Some fields are 'free form' - you can enter anything, like a name or address. A second type of field require data in a certain form (for example you must put a number into the field asking for the amount of a gift).

4.4.1 Character Sets

When entering names and addresses, most keyboard characters can be used, including accented characters (é, ñ, å, etc). However, do not use double quote marks (") since this character is reserved for a special purpose in exporting and importing data. Use single quotes (') instead. (Double Quotes may be used in setting up address layouts and in form letters, but not elsewhere.)

The characters '>' and '<' are used in form letters to mark places where text will be inserted in a letter. The two symbols indicate text which the same for each partner (>) and text which is different for each partner (<).

4.4.2 Date Format

Many screens in PETRA require you to enter a date. A simple example is shown in Figure 4-7.

Figure 4-7 Typical Screen Showing a Date Field



The date is always displayed showing the name of the month. However, it can be entered either using the name of the month (e.g. 25DEC2002) or using only numbers, for example:

25DEC2002

DDMMYYYY for example 25122002, for 25/12/02 in Europe

MMDDYYYY for example 12252002, for 12/25/02 in America

The numerical date format is set up by the System Administrator as European or American. To enter a numerical date, just type the eight numbers according to the format. You do not need to type '/'. The names of months can be set for the local language (see the SYSTEM MANAGER USER GUIDE).

Tips for entering dates

- Short-cuts are possible, using the number of days from today.

For today, type	=	and then	<Enter>
For 30 days after today, type	+30	<Enter>	
For yesterday, type	-1	<Enter>	
- If you make a mistake double-click in the box to highlight the date, and type the whole date in again.
- If you wish to clear the field completely, double-click to select the whole field, type a question mark '?', and then press the <Tab> key.
- Often PETRA will show today's date as a default. If this is what you want, there is no need to change it.
- It is not always necessary to type the full year. If you type just DDMM (or MMDD), then PETRA will assume you want to enter the current year, and enter it again. If you leave out the century and just enter, for example, 251202 (or 122502 for American format), PETRA will default to 19YY for years 80-99 and 20YY for years 00-79.

4.4.3 Number Formats

PETRA can be set up to use either a comma ',' or a full-stop '.' for the decimal point (see the SYSTEM MANAGER USER GUIDE). However, when a comma ',' is set as the decimal marker, exported '*.csv' files which are exported will be in the format '*.;sc'. In addition the format of currencies can be set up as required as described in the FINANCE USER GUIDE.

4.5 Undo and Cancel

Most operations in PETRA require you to enter data into a screen and then click **Save** to record those changes. Once data has been saved, there is no automatic way to undo it. However, while you are editing a screen it is possible to undo the changes that have been made to either one data field, or to a complete record. This is done by using the **Edit** menu (see section 4.3.2, page 23).

In most operations you can stop what you are doing by clicking the **Cancel** button or the **Close** button. This closes the screen; any changes which have not been saved are ignored.

4.6 Help System

In almost all PETRA screens there is the facility to call for help or advice on what to do next. If screens have a Menu Bar, then Help is one of the menu items shown there. For screens which do not have a Menu Bar, a Command Button provides Help.

The Help facility displays the User Guides (like the document you are reading). These are in PDF format, and so may be read using the Adobe Reader program, which is launched automatically (or can be downloaded from this screen if it is not already on your computer.)

4.6.1 Using Help

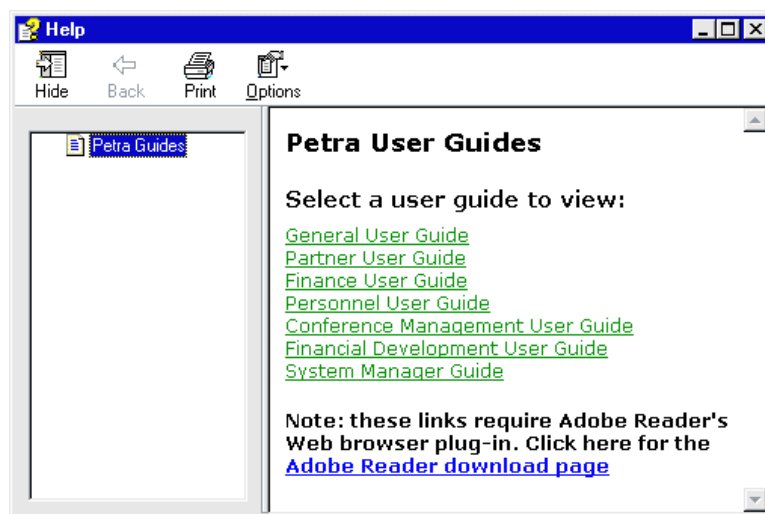
The help menu gives several different options as shown in Figure 4-8.

Figure 4-8 Help Menu from Menu Bar



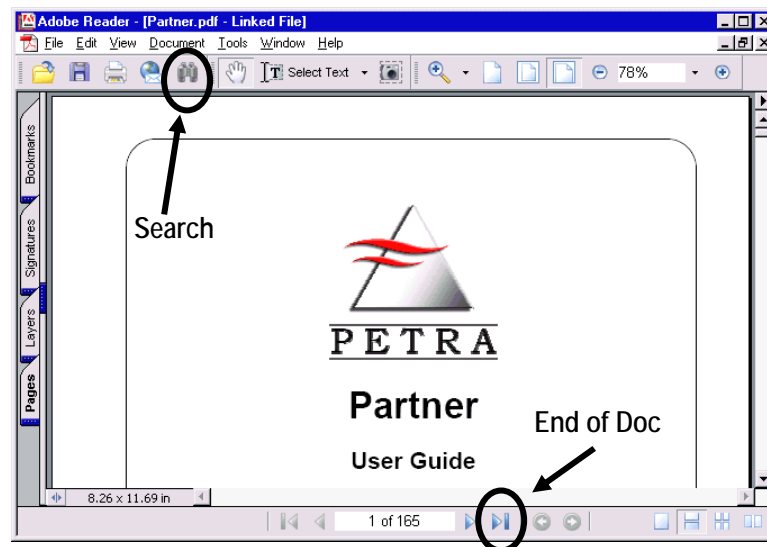
1. When you click on Petra Help, the first *Help Screen* appears:

Figure 4-9 PETRA Help Screen



2. From the list on the right-hand side, select the User Guide that you wish to consult. There may be a slight delay, since your computer will first open the Adobe Reader program, and then display the user guide in a special Adobe Window.

Figure 4-10 Typical Help Screen



3. The document may now be read like any other PDF document. To find what you want, you may find it easiest to go to the index at the end of the document. To do this, click on the 'End of Document' button on the navigation bar at the bottom of the screen (circled in Figure 4-10). This shows the relevant page number in the User Guide. Then click once in the box showing the page number the bottom bar of the screen and press the <return> or <enter> key on the keyboard. You will be taken to the page you require.
4. An alternative is to use the Search facility (see icon highlighted at the top of Figure 4-10). This allows you to search the text of the document for a word or phrase. However, it should only be necessary to use this if you cannot find what you need in the index.
5. Close Adobe Reader and the Help Screen, by clicking on ☐ at the top right of the window.

4.6.2 Upgrade History

The Help System also allows you to check which version of PETRA you are using. This is important if you need to discuss issues with the Support Team. To check the history, go to the PETRA Help menu, and select About Petra. A screen appears listing the version number and a program name. You should make a note of both of these if you need to report a problem to the PETRA team.

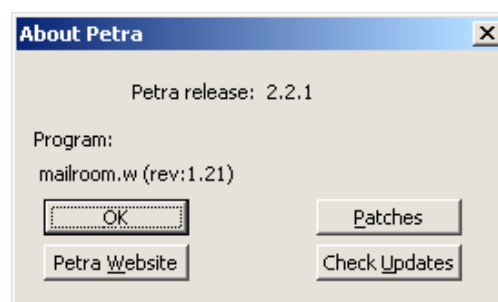


Figure 4-11 Typical Help Screen

To check which patches have already been run on your installation, click . To visit the Petra Website to check for new patches, click . There is also a button to visit the to view other information about PETRA.

4.6.3 Reporting Bugs

Occasionally PETRA users may find identify some aspect of PETRA which does not appear to work correctly. It is important to report this to the Development Team so that any bugs can be corrected in future upgrades. To report a bug:

First make clear notes of the problem. Go to the screen that caused the problem, and from that point select Help -> About Petra, as described in section 4.6.2. Note the program name, since this shows which mini-program within PETRA caused the problem.

From the *Petra Main Menu Screen*, select Help, then Bug Report. The *Bug Report Screen* appears.

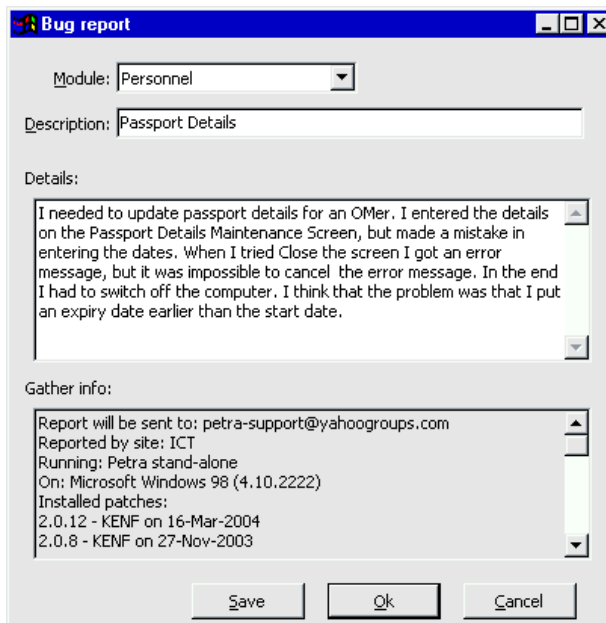


Figure 4-12 Typical Bug Report

Select the **Module** you were using, and enter **Description** and **Details**. Try to provide as much information as possible, even if it does not seem important, so that the Development Team have a good chance of reproducing the fault and fixing it.

Click **[OK]**. The report will be sent to the PETRA Development Team.

4.7 Shepherds

Some operations in PETRA involve entering many items of data, and it is easy to forget some items. To make these operations easier, PETRA includes 'Shepherds'. These guide you through key tasks, such as entering a new partner. When you run a Shepherd, a simple screen appears asking for the first items of data required. The user enters these and then clicks on the button marked **[Next]**. This brings up a second screen asking for more data. This continues until all key data has been entered. It is possible at any stage to click a **[Back]** button, to check or correct an earlier stage. The last screen contains a **[Finish]** button, which completes the process. Figure 4-4, page 22, shows a typical screen.

It is not necessary to use Shepherds. The conventional screens can still be used, and users must know how to use them, since Shepherds do not allow all details to be entered, and they cannot be used later to change data. However, they help make basic operations quicker and easier.

The Shepherds are described in the individual User Guides, and exist to help processes for the partner, finance and personnel modules. It is planned that more Shepherds will be added with later releases of PETRA.

----- End of Chapter 4 -----

Chapter 5 Logging in to PETRA

5.1 Preparation

PETRA has been designed so that people can use it without much knowledge of computers. However, it is good to learn to use a computer for simple operations like word-processing before using PETRA, so that you know how to use the keyboard and mouse to enter and edit data.

Before you can use PETRA, it must be installed on the computer you are using. The 'Release Notes' that come with the PETRA software explain how to do this. Alternatively the PETRA installation team will install it for you. After installation, PETRA must be 'configured' for you before you can use it. This is explained in the SYSTEM MANAGER USER GUIDE, and is normally done by the System Administrator. If in doubt, check with the person who is responsible for your computer systems.

Getting Started

Before you can use PETRA, you must have your own **User ID** and **Password**. Your System Administrator will normally give these to you, although later on you can change your own password.

After you switch on your computer, you will usually see the general Windows desktop. It will contain several icons (little pictures or symbols), including the PETRA icon, which you can see in the header at the top of this page. To start PETRA, use your mouse to double-click on the PETRA icon.

5.2 Logging in

To log on to PETRA, take the following steps.

1. Open PETRA. To do this, find the PETRA icon (or symbol) on the computer screen, point to it with the mouse, and double-click. The programme loads, and after a few seconds, the *Petra Login Screen* appears:

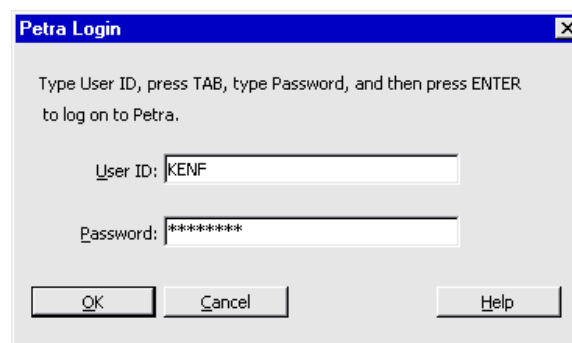


Figure 5-1 Petra Login Screen

Follow the instructions shown on the screen, as follows.

2. Enter your **User ID** (your personal User Identification name)
3. Press the <Tab> key on your keyboard. This will move the cursor to the second box, **Password**.
4. Type your password, being careful to use the correct case of letters. Upper or lower case are different, so if your password is 'APPLES3', and you type 'apples3' you will be rejected. When you type in the box, the letters appear as '*' They are not shown on screen, since otherwise someone else could see your password as you typed it in.
5. Either press the <Enter> key on your keyboard, or point to the **OK** button with the mouse and click once.

6. If you are successful, you will be logged in to PETRA, and the *Petra Main Menu Screen* will appear (see Figure 5-2).

If you have made a mistake, you receive a warning message 'Access Denied'. Check the **User ID** and **password** and try again. You are allowed three attempts. After this the login screen will be removed, and you have to start again. If you have further problems, consult your System Administrator.

Passwords The System Administrator will give a temporary password to each new user. Each user should change their password, at regular intervals, for security reasons. This is explained in section 5.5, 'Changing Your Password' on page 32.

5.3 The PETRA Main Menu Screen

When you log in, you see the *Petra Main Menu Screen*.



Figure 5-2 *Petra Main Menu Screen*

This screen is the starting-point for all PETRA operations. There are two ways to continue from this screen. The large buttons in the centre of the screen allow you to open one of the PETRA modules (Development, Finance, etc.).

To open a Petra Module

Most users will want to go directly to one of the PETRA modules. To open the finance module, for example, use the mouse to point to the large button near the centre of the screen, labelled Finance. Click once, and the Finance module opens. To use this module, refer to the FINANCE USER GUIDE. Do the same to open any of the other modules, and then refer to the appropriate User Guide.

Menu Bar options

At the top of the *Petra Main Menu Screen*, there are four other items, labelled: File, Options, Petra and Help. To use these, point with the mouse to the word, and click. The menu options for this item appear in a 'drop-down' list. For example, when you click on Options, you see several

possible choices (User Defaults and Change Password), as shown in Figure 5-3. To select one of the sub-menu items, point to it with the mouse and click once.

Figure 5-3 Upper part of Main Menu Screen showing Options menu items



The various possibilities, for the four different menus, are as follows:

Menu	Sub-menus	Item	Section in this Guide
File	Login	Logs out the existing user, and brings up the Login Screen again. This allows one user to log out and another one to login, without exiting from PETRA.	6.2.2
	Reprint report	Takes you directly to the screen for re-printing reports. This provides a quick way to reprint an existing report. See the sections on reports in the other User Guides, as well as the section shown in this Guide.	
	Caleb Export	Exports data from PETRA to the Caleb system.	
	Exit	Logs out the user and exits from PETRA.	
Options	User Defaults	Allows the user to 'customise' some small details of PETRA for his/her requirements.	5.6
	Change Password	Allows the user to change his/her existing password to a different one.	5.5
	Display/Hide Picture	Displays/hides a rocky mountain picture on the opening screen, to remind you of PETRA!	
Menus	Partner Finance Personnel Conference Management Financial Development System Manager	These menu items open the different PETRA modules. The effect is the same as clicking on the large buttons in the centre of the screen.	
Help	Search	Brings up the help facility to search for instructions and advice on different topics.	4.6
	Contents	Provides detailed instructions on Help.	
	How to use Help	Provides a simple way to report a bug to the Development Team.	
	Bug report	Shows which version of PETRA is running. Clicking Patches shows which update patches have been applied.	
	About Petra		

5.4 Logging Out

When you have finished working, you must log out and exit from PETRA. It is very important to exit from PETRA at the end of a session. If the computer is switched off without exiting, there may be problems when you next wish to login, and the System Administrator may need to reset the programme before you can use it.

To log out, check that all screens in PETRA are closed, except for the *Main Menu Screen*. From the menu bar click on **File**, to show menu items. There are now two choices to exit.

- If there is no further need to use PETRA for this session, click on **Exit**. PETRA logs you out and closes.
- If there is another user waiting to use PETRA, click on **Login**. PETRA will log you out, and then display the *Login Screen* ready for the next user to enter their User ID and password.

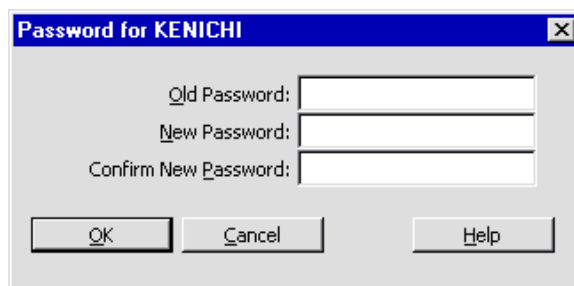
5.5 Changing Your Password

Each user of PETRA has their own password. These passwords should be changed at regular intervals to ensure that the data on PETRA is kept secure. Passwords must be at least three characters long, and can contain any number or letter. They are 'case sensitive', which means that there is a difference between upper and lower case letters (a, b, c are not the same as A, B, C).

To change your password:

1. Log on to PETRA.
2. From the Menu Bar, select **Options**, then **Change Password**. The *Password Screen* appears:

Figure 5-4 Password Screen used to change password



3. Enter data, using the <Tab> key to move between each box.
Old Password Type your existing password
New Password Type your new password
Confirm New Password Type your new password a second time.
4. Click **OK**.
5. When you next login, use the new password.

5.6 User Defaults

In entering data, etc., PETRA allows the user many choices. However, sometimes one particular user will normally use one particular choice. PETRA can be set up so that when this user is logged in, PETRA will normally assume a particular choice of Ledger. This is the default choice (the default is that option which is assumed if no attempt is made to change it).

In addition to the items mentioned below, PETRA remembers some options that a user selected the last time he or she entered a new partner, and assumes the same as the default values (the actual information is for receipt frequency, language and acquisition code). These are explained in the PARTNER USER GUIDE.

To set up User Defaults:

1. The user for whom the defaults are to be set must log in so that the *Main Menu Screen* is open.
2. From the menu bar, select **Options**, then **User Defaults**. The *User Defaults Screen* appears.

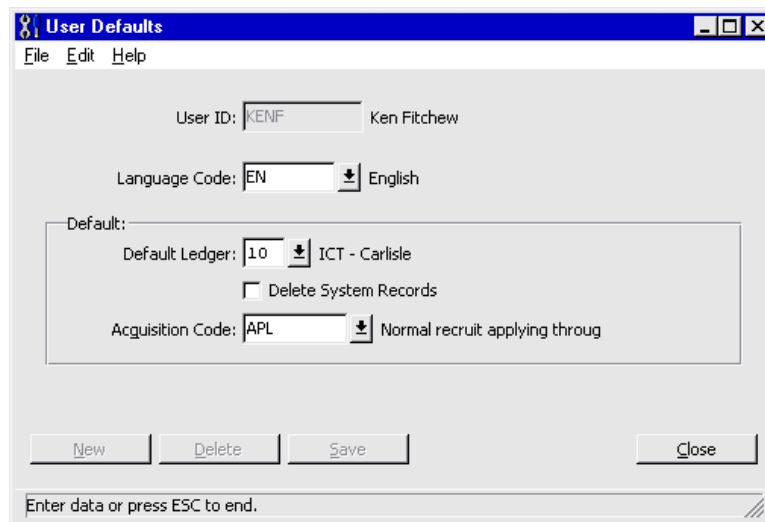


Figure 5-5 User Default Screen

3. Enter the required default options as below:

Default Ledger From the drop-down menu, select the most common ledger that you wish to use as the default.

Language Code Select your preferred language. At present this only affects the welcome message after logging on, but in later releases it will present other items in the selected language.

Note User defaults have also been included in the partner module. When a user enters certain items of partner data, PETRA remembers what was selected, and uses this as the default entry for the next partner. This works for the following items (see the PARTNER USER GUIDE): Acquisition Code, Language Code, Receipt Every Gift and Receipt Letter Frequency. This also applies to the 'Mailing Address' setting on the *Partner Find Screen*.

Acquisition Code You can set the acquisition code that will be used next time you enter a new partner. However, as noted in the Note box, this setting is now 'sticky', so later selections will be remembered and become the new default.

Delete System Records [Not yet available] This box should be empty. This facility will only for use by the System Administrator, since it gives rights to delete certain system records.

4. Click .

----- End of Chapter 5 -----

This page is blank

Chapter 6 Printing from PETRA

There are two aspects to printing: setting up the printer, and the printing operation itself. Setting up a printer is done by the System Administrator, and is explained in the SYSTEM MANAGER USER GUIDE. This also covers setting the size of paper and labels that will be used.

The reports, etc that can be printed from PETRA can also be sent directly by e-mail, using the Pegasus Mail program, which is used by many offices. The e-mail procedure is very similar to normal printing, and is done from the same Print commands. However, data is sent to the email program instead of to the printer. The additional instructions are explained in a section later in this chapter.

6.1 Overview of Printing

Using a printer is a necessary function of all the PETRA modules (Partner, Finance, Personnel, etc.). The main principles are the same and are explained in this chapter. The actual reports are of course very different for the different modules, and further detail is given in each User Guide.

The main items to be printed are:

- **Reports** PETRA provides many types of standard report, such as lists of partners, accounts, personnel records, etc. These are described in the different User Guides.
- **Labels or envelopes** The Partner module prints these for mailing purposes. The PARTNER USER GUIDE explains this in more detail.
- **Form letters** These are letters to be sent to a number of different partners, which are 'customised' for each partner. This means that the main part of the letter is the same, but each letter is slightly different (for example it contains the partner's name and address at the top). The PARTNER USER GUIDE explains how to write and print a form letter. A major use is in providing Gift summaries and acknowledgement letters.
- **Receipts** Official receipts for gifts are printed from the Finance module. The layout of these can be adjusted by the user, although not to the same extent as for Form Letters. However, the issuing of receipts is strictly controlled by the accounting procedures in the Finance module.

In addition to these main print jobs, PETRA also has a print menu on most screens, allowing you to print the data relating to the item that you are editing. For example, full details of a partner can be printed from the *Partner Find Screen*.

Key Principles of Printing

There are a number of terms used in printing which need to be explained.

- **Reports** For most print jobs PETRA collects data and assembles it into a **report** before sending it to the printer. Reports are stored for a time (as set by the System Administrator), and so it is possible to **reprint** a previous report.
- **Run Mode** Normally you will wish to print immediately, but there are some jobs which can take a very long time, and should be done at a time when the office is not busy. These can be delayed so that the print job is done in **batch mode** when the System Administrator decides it is the best time to do it.
- **Print Destination** You can send reports to any printer set up in Windows, but you can also send them to other **destinations**. You may wish to see the data on your computer **screen**, before putting it on paper. It is a good idea to do this when you are using a report for the first time, so that you can check that everything is correct, and avoid wasting paper or labels. You can then

reprint the report if all is well. You can also send the report to a **file** (either a plain text file, or formatted HTML), or send it by **email**. Take care with email regarding security, because email can be intercepted and read by anyone on the Internet.

6.2 How to Print

6.2.1 Printing a Simple Report to Screen

The main steps in printing using the normal or 'default' settings are shown in the following example. Some print jobs require additional stages in preparing the data to print. The example starts from a typical screen from section 4.2, but you can try this from many other screens.

Example: Print details of the list of authorised PETRA users, shown in Figure 4-2. Print this to the computer screen in order to view it before printing to paper.

1. On the *User List Screen* (Figure 4-2), select the **File** menu on the menu bar, and then the item **Print**. The *Start Print Job Screen* appears.

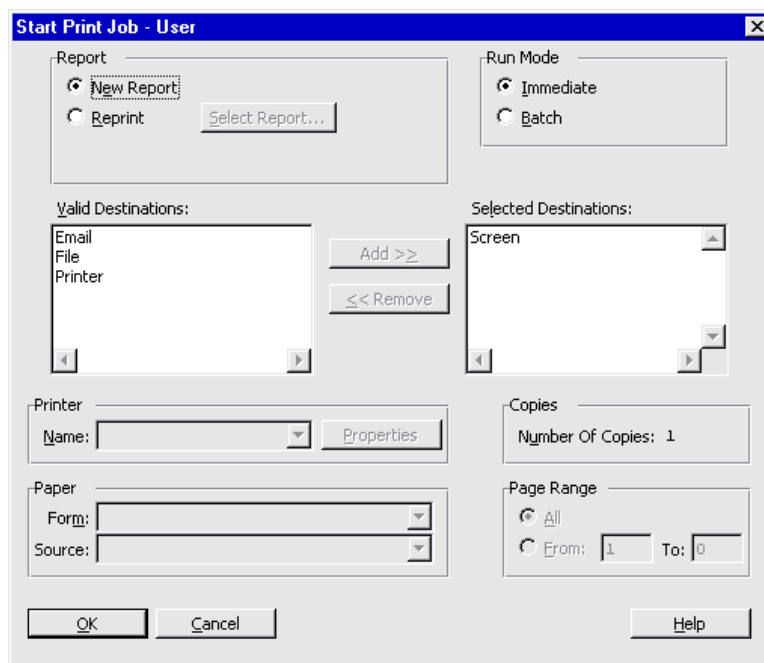


Figure 6-1 Start-Print Job Screen

2. At the top of the screen select **New Report** and **Immediate Run mode**. The two panels in the middle of the screen allow you to select the print destination. The right-hand box shows the destination currently selected, and the left-hand box shows the other possible destinations. In our example, we want destination **Screen**, so no change is necessary. Section 6.2.2, page 37 will explain how to change the print destination when necessary.
3. Click **OK**. The report will now be printed to the computer screen.

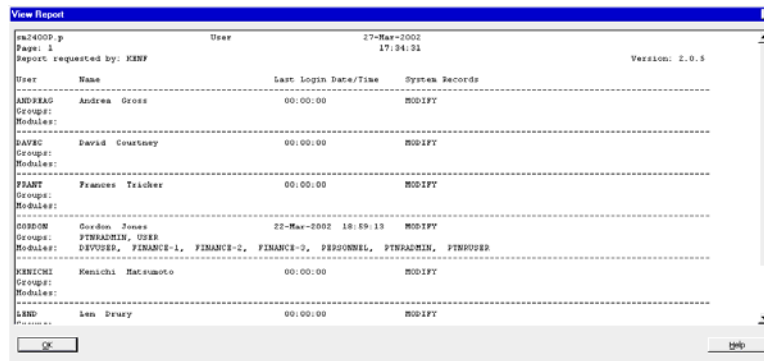


Figure 6-2 Results of printing User List to screen

- The print job has been finished, so when you have finished viewing the data, click OK.

TIP - Note the time! When you print a report which you may need to reprint again, write the time in your diary. When a report is reprinted, you need to know the date and time that it was first printed; otherwise you cannot identify it in the list of previous reports.

6.2.2 Changing the Print Destination

In the example in section 6.2.1, the print destination was the Screen. After printing to screen, and checking that the report is correct, it is necessary to change the print destination. The procedure is described by continuing the example.

Example (continued): The Start Print Job Screen is at present set to print to the computer screen. We wish to change this to print to a Canon laser printer.

- Figure 6-1 shows that screen is selected as print destination. Click on Screen in the right-hand box, and then click the Remove button. This moves 'screen' from the selected destination list to the left-hand box (it stays in the left-hand box, because it is still a possible choice, and you could move it back again.)
- In the left-hand box, click on Printer to highlight it, and then click the Add button. Printer now moves to the right-hand box to show that it is now the new destination for the print job, as shown in Figure 6-3.

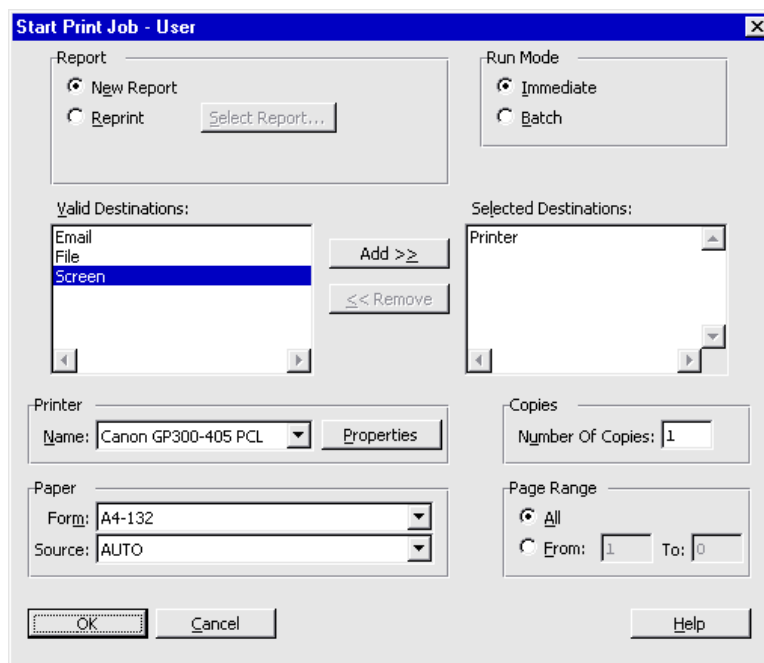


Figure 6-3 Print Screen showing Printer as selected destination

- Now that Printer has been selected, the lower dialogue boxes are clear. Select the printer, and paper to print to (Form), number of copies and page range (Note that "To page 0" will print to the end of the report. Click **OK**, and the report will be printed to the selected printer.

It is possible to select more than one type of printer destination at the same time. The different types of destination are as follows:

- **Printer** This is the most usual destination for paper copies.
- **Screen** Displays the report on the computer screen to allow a visual check
- **File** Allows you to save the report in a text file. A separate dialogue box asks you to choose a file-name and directory for the file. If you choose an existing file, PETRA asks you if you wish to **Append** the data to the existing file, that is to add it to the end of the existing file, or to **Overwrite**, which means to replace the file with the new report.
- **E-mail** This will send the report to an e-mail destination. Emailing is explained in more detail in the PARTNER USER GUIDE.

Reports printed to Screen, File and Email are continuous. Other reports are broken into 66-line pages.

6.2.3 Reprinting a Report

As mentioned in the introduction, PETRA stores reports for a few days after printing. If you have printed a report to screen, and it is satisfactory, it is not necessary to generate the same report again when you print to paper; instead you can reprint the report that you have just created.

Example: Reprint the report of PETRA users (section 6.2.1) onto paper.

To reprint an existing report, first open the *Start Print Job Screen* as described in section 6.2.1. This is also available from the File menu on the main opening screen for PETRA.

- In the top left of the screen click Reprint, and then the Select Report button. The *Select Report Screen* appears, showing the previous print operations (the latest is at the top of the list).

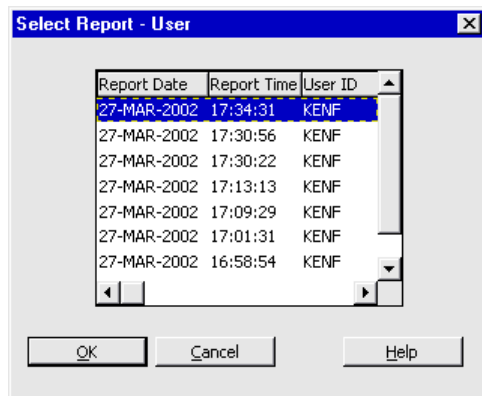
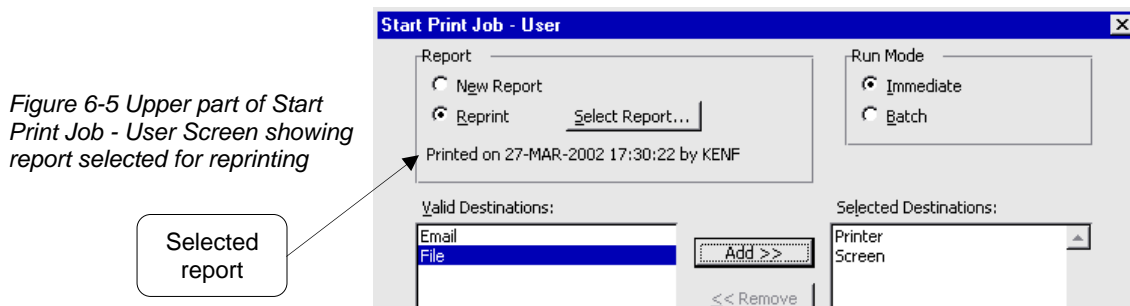


Figure 6-4 Select Report

- From the list select the report that you printed before, by reference to the date and time when you produced the report. Click **OK**. This returns you to the *Start Print Job Screen*, which has now been updated to show the selected report to be reprinted. Continue printing as before.



6.2.4 *Batch Mode Printing*

Some print jobs take a long time, especially certain reports relating to a large number of partners. The time to actually print the report may be short, but the computer takes a long time to put the data into the necessary form. PETRA allows such reports to be printed in **Batch Mode**, which means that the operation does not take place immediately. Instead, it is recorded in a list of jobs to be done later. The 'batch' of jobs like this is started by the System Administrator at a time when the computer is less busy (usually overnight).

To print in batch mode, select `Batch` from the *Start Print Job Screen* (Figure 6-1). Select the report and the print destination and click . PETRA then displays a confirmation message to tell you that the job has been submitted for printing later.

----- End of Chapter 6 -----



This page is blank

Chapter 7 Exporting Data to Caleb

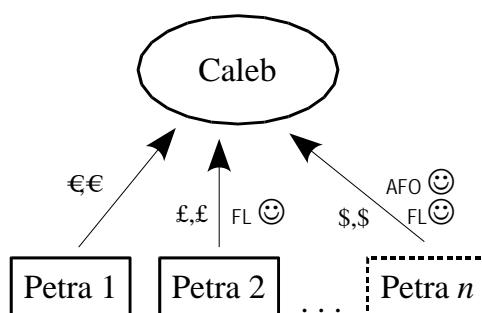
7.1 Relation of Caleb to PETRA

Caleb is the Organisation's web-based information system, which allows members to access and post information appropriate to their position. For example: (1) the Financial Management module of Caleb allows members of the organisation to see the latest position on gifts given for their support, and leaders to check figures for their field or key ministry projects, etc; (2) The Advertising and Administration module allows Personnel officers to publicise opportunities to serve; and (3) the Information Sharing module will allow others to share information using the Intranet functions.

PETRA has two roles in supporting Caleb.

- Since all gifts are entered via PETRA, gift data needs to be exported to Caleb, so that members and those responsible for projects can view the current position on gifts.
- The right of an individual to access certain functions in Caleb (e.g. to advertise an opportunity to serve) depends on the roles that they have been assigned in the Organisation, and PETRA is used by Personnel offices to assign these roles. So, this information on individuals' roles also needs to be exported to the Caleb system.

Figure 7-1 Relation of PETRA to Caleb. All PETRA installations export data on gifts received and people's roles



Tip Additional information on Caleb is available to authorised users on the Caleb web-site:
www.om.org/caleb/training

When the Caleb Export function is used, the following data is exported to the Caleb System. During the export operation it is possible to alter the dates for which such data applies (e.g. gifts during the last 45 days).

Type of data	Main data items exported
For each donation	donor and recipient partner keys, date, amount, currency, source ledger, comments, etc.
For each donor	partner key, name, address information, anonymous flag, etc.
For each person (non-donor)	name, family key, address information, home office
For each field	partner key, address information, etc
For each role	partner key of person, role name, field to which the role applies, start date and end date of period the person holds that role.

7.2 To export data from PETRA to Caleb

Data should be exported to Caleb whenever a new batch of Gift Entries have been posted (See FINANCE USER GUIDE) or Roles have been updated (see Job Assignments in the PERSONNEL USER GUIDE.) Some offices may find it convenient to do this at fixed times, for example on a weekly basis. The data which can be exported from PETRA to Caleb depends on the access rights of the PETRA user.

1. From the main *Petra Main Menu Screen* (see Figure 5-2, page 30), select **File**, then **Caleb Export**. The first time that a Caleb Export is made from a PETRA installation, a *Password*

Screen appears. (This password will be transmitted to Caleb along with every export.) Enter the password provided by your Area Personnel Officer. Click **OK**.

- The *Caleb Export* Screen appears:

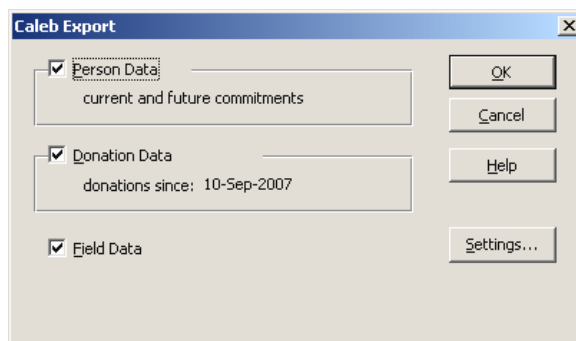


Figure 7-2 Caleb Export Screen

At this point it is possible simply to click the check boxes to select which items of data will be exported using default settings for the time period. However, it is possible to alter the period for which data should be exported by clicking **Settings**. The check boxes will be described below, along with the settings.

- Click **Settings**. The *Caleb Export Settings* Screen appears.

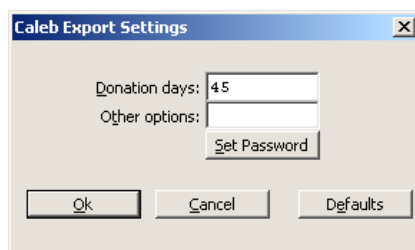


Figure 7-3 Caleb Export Settings Screen

Person Data If the Person Data box is checked, then Person details are exported for all persons who have a current commitment or future record

Person Donation Data If this box is checked, then details are exported for all gifts in support of individuals (Motivation GIFT) which were recorded in entry batches which were closed within the past Y days, where Y is set using the Settings option.

Y is set in the **Person donation days** field (in the example all donations entered in batches closed within the last 45 days.)

Other options Currently this is a spare field.

Set Password If required, this button can be used to change the Caleb password.

Field Data If this box is checked, data about your PETRA field is exported.

- When all settings have been adjusted as required, click **OK**. Select the required items using the check boxes on the *Caleb Export Screen*, and click **OK** again. The relevant data is then encrypted and attached to an email ready to be sent to Caleb when you next use your email program.

----- End of Chapter 7-----

Appendix 1 Summary of PETRA Features

PETRA is being continuously upgraded. The following list of features relates mainly to Release 2.1. Additional features are already planned for later releases.

System / Feature	Impact / Benefit
------------------	------------------

General Features

On-Line Help	Will be available at all levels in the system. Allows the User Guides to be viewed.
Undo	In most places it is possible to undo screen entries, but only before a screen has been saved.
Multi-lingual	The language for data entry is selected with PETRA is installed.
Security	Login: Users of PETRA must have a unique identification and password to gain access. Programs and Files: View, Add, Change, and Delete access permissions can be assigned to an individual or to a group of individuals.
Printing	All devices that use Windows printer drivers are supported.
Electronic Mail	The system supports the Pegasus Mail package, and other MAPI-compliant email clients
Operating Systems	Client runs on Microsoft Windows 98SE and above. The server can also be run on OM Standard Linux.
Look-ups (Finds)	Keys: Search for a record based on entered information.(Version 1) Browse Facility: A browse option exists for many input windows.
Audit Trail	Date of last change is recorded for all records, not just financial records.
Export and Import	Exchange of data with other sites by exporting and importing partner data.
Shepherds	Short sequence of screens to guide the user through complex operations.

System Manager

Login Log	Allows the system manager to see who has used the system, and when.
Error Logs	All errors in a program are saved to allow the support team to quickly and easily ascertain the problems which have occurred in a system.
Transaction Journaling	In the event of a major error, the software will automatically roll back the changes to maintain the integrity of the data base. It is also possible to roll forward when needed.
Site-specific Settings	Site-specific settings for certain parameters. Security management and user management.

Partner

Categories	Family, Person, Organisation, Church, Internal organisational Unit, Conference, Bank, Conference venue
Postal Sorts	Sorting by postcode. Special sort orders can be provided by special request for offices with a sufficiently large mailing list to qualify for postage reductions.
Number of Addresses	Keeps all Home and Business addresses - previous, current, and future. This includes seasonal, delivery address, and mailing addresses.
Phone, Fax, E-mail, URL	Keeps each of these by address.
Separated Names & Addresses	Names and addresses are stored in separate records. So, an address is stored only once in the system even if it is used by 100 people.
Relationships with other partners	Any partner can be related to other partners via a user defined relationship, such as a church being recorded as a supporter of a member.
Finance Details	Bank accounts for partners and credit cards.
Contact History	Records contacts that have been made with a person. If an office chooses to use this option it will require discipline for maximum benefit.
Subscriptions	Manages free and paid publications and other items sent on a regular basis.

System / Feature	Impact / Benefit
Personalised Greetings	A user can define a specific greeting for a partner which is then used for all 'mass' correspondence from that user to the partner.
Reminders	Reminders to contact a partner at a future date can be set up.
Status	Active, Inactive (hasn't given in the last x months or years), Deceased.
Selection of Partners	Partners can be grouped according to different criteria, such as address, partner type, etc, for many operations where a group of partners are to be treated alike.
Family Members	Linking of individual persons who are members of the same family.
Form Letters /Mailmerge	Form letters and mailmerge facilities for contacting multiple partners.
Local Partner Data	Any number of fields can be defined for flexible local use in an office.
Partner Management	Merging of duplicate or complementary entries.

Personnel

Unit (Team) Management	A unit is an organisational operating entity in the Organisation. (e.g. Finland, European Co-ordinating Office, Finance Dept in UK)
Applications	Handles all applications for all campaigns and positions in the Organisation.
Personnel Data	Maintains data about people serving in the Organisation.
Travel	Manages travel information for people participating in events.
Applicant & Personnel Data	The amount of data retained will depend on the length of time that the person is serving. A minimal amount is needed for short term people; for longer term people job history, education, employment and skills can be added..
Pre-Selection	An applicant's data – can be passed on to the Field(s) of their choice.

Conference Management

Venues and accommodation	Conference sites can be set up with buildings and rooms
Costs	Attendance costs, including discounts, accommodation, etc.
Attendee Records	Attendance, arrivals, departures, etc can be entered and monitored.
Attendee Management	Management of groups, printing labels, reports, etc
Accounting	Production of invoices and accounting reports

Accounts

Self Balancing	The General Ledger will always be in balance.
Multi-Currency	- Able to handle transactions in currencies other than the base currency. - Produce reports in any currency
Audit Trails	Able to track transactions from its source to its output and vice versa.
No Prior Posting	Transactions cannot be back-dated to previous period.
Recurring Journal Entries	Each section of the financial system allows for the definition of recurring transaction entries.
Account Codes	Define a multi-level structure.
Cost Centres	Define a multi-level structure.
Financial Calendar	Maximum of 20 periods.
General Ledger	Record all financial transactions.
Gift Receipting	Receipt all gifts. This includes recurring gifts (Direct Debit, Standing Orders, Post-dated cheques).
Accounts Payable	???
Budgeting System	Records budget for the next financial year; tracks actual performance against budget. Procedures to help generate budget. These are defined by account and include options to apply inflation rate using average of expenditure in last year.

----- End of Appendix 1 -----

Index to General User Guide

Note: Many of the topics introduced in this GENERAL USER GUIDE are covered in more detail in the other User Guides for the individual PETRA modules (see section 2.1, ‘The User Guide Set’, for a description of the contents of each User Guide).

Tip If using Acrobat Reader to view on line, you can jump to the page. Find the item in the index, click once in the box at the bottom of the Reader screen to highlight the field, type the page number you want, and then press the <Enter> or <Rtn> key. This takes you immediately to the page.



- | | |
|----------------------------|----------------------------------|
| abilities, 8 | Field Office, 8 |
| access rights, 12 | File menu, 23 |
| accommodation, 9 | finance module, 11 |
| accounting system, 11 | financial development, 12 |
| accounts payable, 10 | Find menu, 23 |
| address, 7 | form letters, 8, 15 |
| application, 8 | general ledger, 10, 11 |
| audit trail, 43 | gift receipting, 11 |
| badges, 9 | gifts, 10 |
| batch, 10 | Help system, 12, 26 |
| budgets, 11 | history, upgrades, 27 |
| Caleb export, 41 | ICH Stewardship Report, 10 |
| calendar, 44 | import, 9 |
| campaign, 8 | importing data, 12 |
| character sets, 24 | International Clearing House, 10 |
| class of partner, 6, 16 | invoices, 10 |
| commitment, 8 | job abilities, 9 |
| conference, 8 | job positions, 9 |
| conference management, 9 | job qualifications, 9 |
| conference manager, 12 | journal, 10 |
| contacts, 7 | keyboard short-cuts, 19 |
| contacts with partners, 11 | language skills, 8 |
| csv file format, 25 | ledger, 9 |
| cursor keys, 20 | local transport, 9 |
| data protection, 13 | location, 7 |
| date format, 24 | logging in, 29 |
| decimal point format, 25 | logging out, 31 |
| default value, 5 | mailing address, 7 |
| discounts, 9 | mailing codes, 7 |
| edit, 16 | maintain, 16 |
| Edit menu, 23 | modules of PETRA, 10 |
| entering data, 19, 24 | month end closing, 10 |
| event roles, 9 | motivation, 10 |
| events, 8 | number format, 25 |
| export, 9 | OMSS, 5 |
| exporting data, 12 | partner |
| extract, 11, 16 | class, 16 |
| extracts, 8 | contacts, 11 |
| family, 16 | definition, 5 |
| family (partner class), 6 | special type, 11 |
| family ID number, 7 | partner key, 13, 16 |

- partner module, 10
- partner status, 7
- password, 30
 - changing, 32
- person, 16
- personnel data, 11
- personnel module, 11
- PETRA
 - introduction, 5
- posting a batch, 10
- previous experience, 9
- printing, 35
 - batch mode, 35, 39
 - print destination, 35
 - print to file, 38
 - reports, 35
 - reprinting, 38
- professional areas, 8
- publications, 7, 11
- recall last record, 23
- receipt frequency, 10
- records, 23
- regional office, 13
- relationships, partner, 7
- release number, 27
- reports, 12
- rooms, 9
- screen appearance, 17
- security, 12, *See also* access rights
- Shepherds, 28
- site, 13
- special needs, 8
- special type (partner), 7
- status (partner), 7
- subscription, 11
- subscriptions, 7
- system manager, 12
- tables, 16, 20
- terminology, 16
- transactions, 10
- travel details, 9
- type (partner), 7
- undo options, 25
- Unit, 6
- unit hierarchy, 9
- upgrades, 27
- user defaults, 32
- User Guides, 15
 - notation, 16
- user ID, 30
- wildcard, 24
- Windows XP, display, 13
- work groups, 9