



User Guide

Version 2.2a April 2008

THE PETRA USER GUIDE SET

General User Guide

Partner User Guide

Finance User Guide

Personnel User Guide

Conference Management User Guide

Financial Development User Guide

System Manager Guide

This guide →

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Chapter 1 Overview of the Personnel System

1.1 Personnel Principles used in PETRA

Types of Service

People join the Organisation for different lengths of time, and PETRA supports two different application procedures for short-term and long-term applications.

Short-term applications are used for people joining for less than 6 months. Many of these join under the **Global Challenge** programme, and participate in short-term campaigns. Others join under the STEP (Short Term Exposure Programme), which is used, for example, with the Ships.

Long-term applications are used for those who expect to spend longer with OM. Many people join under the **Global Action** programme, for an initial period of 1 or 2 years. Some others may join under the **Global Service** programme, often with a view of on-going work using professional skills and abilities in work with the Organisation.

Organisation Structure

The Organisation has many groups of people working in different countries. In order to co-ordinate the work effectively these teams are organised in a structure. Within OM there are a number of different **Areas** (for example Southern Africa or Western Europe). Within each Area, there are different **Fields** (for example Zimbabwe is a Field in the Southern Africa Area). There may be smaller sub-divisions within each Field, including **Teams**. A **Unit** in PETRA can be an Area, a Field or a team. PETRA allows this structure of Units to be recorded and altered (see section 4.4, Unit Hierarchy, page 55). **Campaigns** are a special sort of unit, which belong to the Field that is organising them.

Sending and Receiving Fields

Many people working with OM live and work in a country away from their home. For example, a person from France may work with OM in Switzerland. In this case the French office is that person's **Sending Field** (formerly known as **Home Office**), and Switzerland is the **Receiving Field** (formerly known just as **Field**) where they are working.

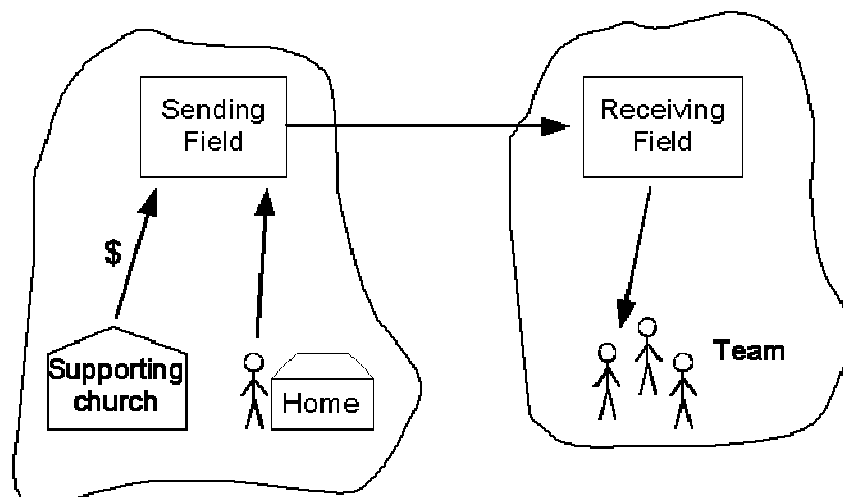


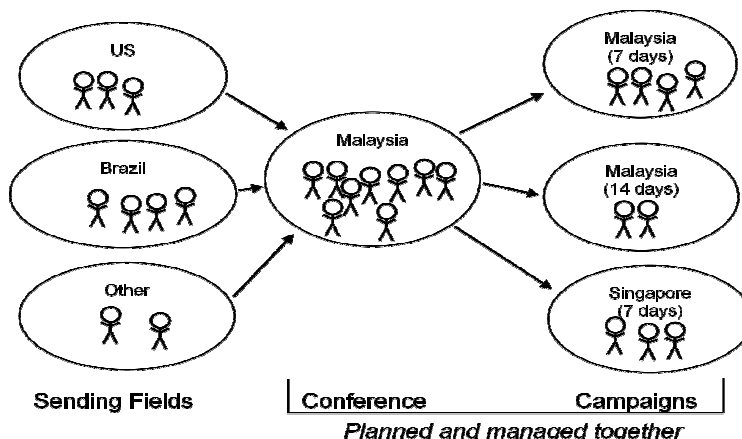
Figure 1-1 Members' Sending and Receiving Fields

Sometimes a person works in their own home country; in this case their Sending Field is also their Receiving Field. When someone wishes to work with the Organisation, they usually apply to their own Sending Field. The Sending Field passes information to Receiving Fields as necessary. The Sending Field also receives gifts from supporting churches and friends.

Short-term Participants

Many people first experience the Organisation by coming on a short-term campaign. The main type of short-term campaign is called **Global Challenge**, and Figure 1-2 shows an example.

Figure 1-2 Short-term Events



Here people from the US, Brazil and other countries are joining a summer campaign. First, they all go to a **conference** or (usually for one week) in, say, Malaysia. Some of them then stay in Malaysia (for two different lengths of time), some to Singapore. For most short-term events, the conference and the campaigns are organised together. Actually, these days there is normally a conference for each country (or pair of countries), but the same model applies, with people moving from a conference to join one of several teams. People who wish to join the campaign send an application to their Sending Field. The Sending Field enters all the relevant data in PETRA as a short-term application, and follows up references to check that the person is suitable. At intervals before the conference, all Sending Fields send or ‘download’ details of all applications to the person co-ordinating the conference and campaigns. This person then arranges the conference details (accommodation, fellowship groups, etc) and also sends the information on to the leaders of the individual campaigns, so that they know who will be coming. PETRA provides support in organising a conference, as described in the CONFERENCE MANAGEMENT USER GUIDE.

For short-term campaigns, the Sending Field will also collect the necessary funding support for the participant in advance of the Campaign.

Long-term Participants

With long-term applications, the Receiving Field must agree that the applicant is suitable for work in that Field. The Sending Field interviews the applicant, and then sends details to the Field where the person would like to work. If it is agreed, then the Sending Field arranges for the applicant to attend one of the two conferences (usually held in January and September). A representative of the Receiving Field will usually be at the conference and will also interview the candidate there, before they go on to join the team in the Field.

The Long-term application form asks for more information than is necessary for applications for short-term events. It is also necessary for the participant to arrange to raise the required level of financial support, usually calculated on a monthly basis. In addition, people working with the Organisation long-term will also have assessments to review their time and experiences at regular intervals. PETRA allows details of such discussions and goals for future action to be recorded.

Unit Job Descriptions

Many teams can be flexible in using staff with a range of skills. However, some jobs need specific skills. For example, a team involved in publishing literature for Central Europe may need people with specific language skills, people who can use Desk Top Publishing programs and people familiar with the world of publishing. Some Fields may also need a qualified accountant. PETRA allows Units to define such jobs, recording the job title, language skills needed, qualifications, other abilities, etc.

Job Assignments

The previous items indicate how the personnel system can record (1) details of people working with the Organisation or applying to join for a short-term or long-term period, and (2) details of the job positions applying to a particular Unit. PETRA also allows links to be made between these two. First, individuals working with the Organisation long-term have a **commitment** to spend a certain agreed with period with the Receiving Field. Second, if Job Descriptions have been set up, it is possible to make **job assignments** to record the people who are doing specific jobs in the Field.

1.2 Scope of Personnel System

The PETRA Personnel System allows offices to record details of all people working with the Organisation (and those applying to join it) and the jobs that they are doing. The Personnel System has two main subsystems called 'Individuals' and 'Units'.

The **Individual** subsystem is used to record all personnel data for people applying to work with OM, as well as those who have already joined. It enables personnel staff to keep the information entered during the application process up to date, and to add new information as it becomes available. Applications for short term and long term campaigns are supported. Personnel Data includes information for campaign applicants as well as long term staff. This means that personnel staff have a comprehensive set of data about each member under their care.

The **Unit** subsystem is used to maintain data about the Organisations teams. It can also be used to show the jobs available within the site covered by the PETRA installation. This will help personnel staff in the whole area of team management. If jobs have been set up for a unit, it is possible to record job assignments, that is where an individual is filling one of the job positions. Thus a link is provided between the individuals and units sub-systems.

Some important basic items of data (including addresses, phone numbers, etc) are entered through the PETRA Partner System. This applies to both individuals and to units. The Personnel System uses this data, and adds to it the additional data items required for personnel management.

NOTE To be able to add or change any data within the 2 subsystems the unit or individual must already exist in PETRA as a Partner. To create personnel records an individual must exist as a partner of type 'Person' as well as a partner of type 'Family'. The PARTNER USER GUIDE explains how to add and edit partners, including the address and relationships (i.e. to churches, other organisations, prayer secretary, parents).

Users of this guide should also obtain a copy of the GENERAL USER GUIDE and the PARTNER USER GUIDE which are referred to frequently by this guide.

This User Guide seeks to give a full explanation of the various features within the Personnel Module, with instructions on how to use the menus and screens it contains. It is essentially a help guide to using the module. Some help is given on how to use the module effectively within an office, but this user guide does not seek to explain all the procedures necessary for operating PETRA within the Personnel department of an office. It is recommended that local procedures for use of the PETRA Personnel module be produced to supplement this Guide.

1.3 Personnel Menu Structure

To open the Personnel Module, click on the Personnel icon in the *Petra Welcome Screen*. The *Personnel Screen* is displayed (Figure 1-3). The menu bar of this screen shows the possible options for action, and instructions in this User Guide assume that you are starting from this screen.

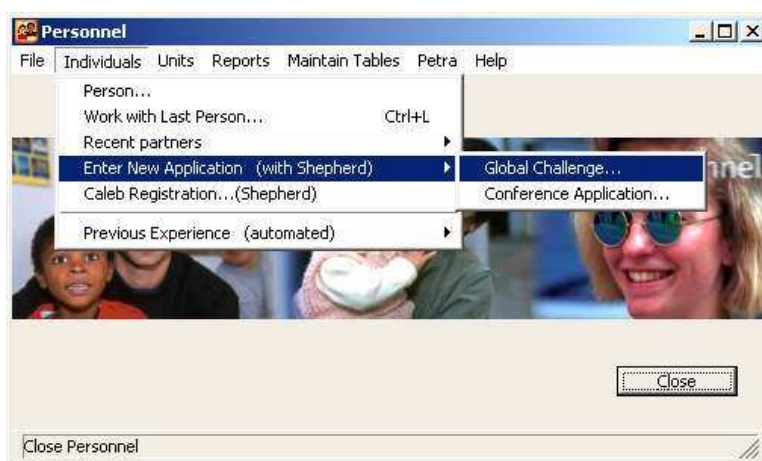
- **File** Allows you to browse short-term and long-term applications and to exit the Personnel module (alternative to using the **Close** button on the main *Personnel Screen*).

Figure 1-3 Main Personnel Screen with File menu open



- **Individuals** is the starting point for most personnel work with individuals.

Figure 1-4 Personnel Welcome Screen, showing Individuals menu



Person allows you to bring up the *Individual Data Screen*, the key screen for entering or amending any information about individual applicants or members of the organisation.

Work with Last partner is a short-cut to take you back to the *Individual Data Screen* of the last partner you worked with.

Recent partners is a short-cut to take you back to any of the last 10 partners.

Enter New Application (with Shepherd) has two sub-menus for entering applications for Global Challenge Campaigns or for Conferences

Caleb Registration .. (Shepherd) allows you to check that all the data required to register a Person with the Caleb system has been entered.

Previous Experience has two sub-menu items for automatically recorded campaign participation on a partner's record (and reversing the process).

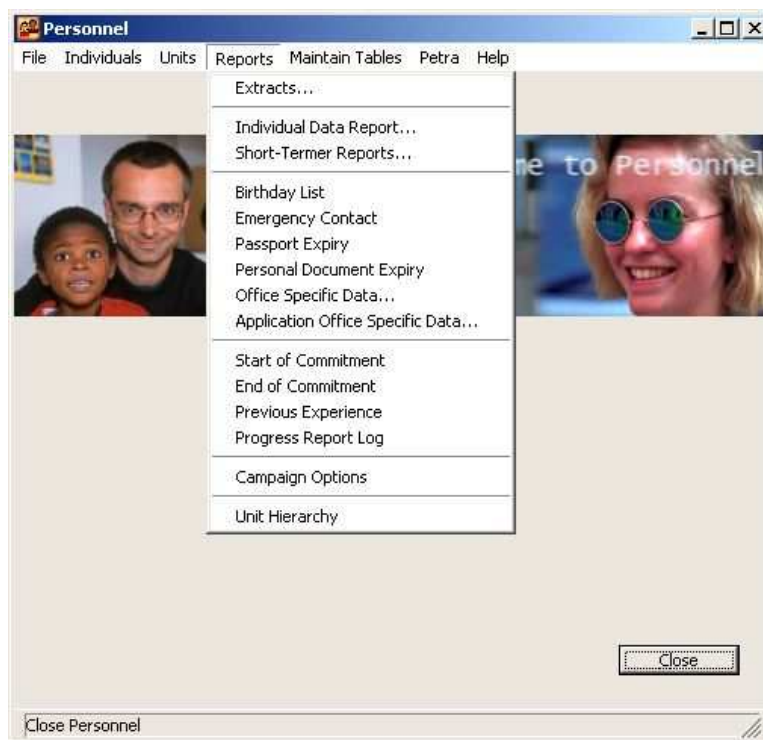
- **Units** allows you to record data about the structure of Units, together with the individual jobs associated with those units, and the skills required.

Figure 1-5 Personnel Welcome Screen, showing Units menu



- **Reports** allows you to create customised reports and print out data in a convenient form.

Figure 1-6 Reports Menu Options



- **Maintain Tables** allows you to edit the various 'Tables', which are really lists of items that can be used when filling in screens. Tables are explained in the GENERAL USER GUIDE, Types of Data.

As shown in Figure 1-7, this is a 2-level menu, with sub-menus. There are three groups of tables. Applications Tables allows you to edit the Tables associated with Applications to join an OM team. Event Tables allows you to edit the Tables associated with Congress and Campaign Events, such as travel to and from a congress. General Tables (the sub-menu shown) lets you edit the tables concerning personal information.

Figure 1-7 Maintain Tables Menu with General Tables Sub-menu



- **Petra** lets you to go to other the other PETRA modules. Select the module you wish to begin and this will open at the same time as the Personnel module. You can then work in two modules at the same time. You can use the equivalent menu in any other module to swap back and forward between modules or return to the *Petra Main Menu Screen*.
- **Help** The Help system is described in the GENERAL USER GUIDE. Help allows you to read the relevant sections of the User Guides on line. About Petra shows you which release of PETRA you are using, and which patches (updates) have been installed on your computer.

1.4 Structure of Personnel User Guide

The Guide is organised into 7 Chapters.

Chapter 1, Overview of the Personnel System

Chapter 2, Individual Personnel Data explains how to enter and edit personnel data, concentrating on more long-term data (information not related to a specific short-term application to join the Organisation).

Chapter 3, Applications explains how to enter and edit applications to work with the Organisation, both short-term and long-term.

Chapter 4, Units explains how to enter information about units, covering teams and fields throughout the Organisation and including the specific types of job relevant to a unit.

Chapter 5, Personnel Reports explains how to produce reports, which print out information from the Personnel database.

Chapter 6, Maintaining Tables explains how to change the options which appear in the various menu lists, called Tables.

Chapter 7, Event (Conference/Campaign) Maintenance covers some special operations to help manage data about Campaigns and Conferences.

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

Chapter 2 Entering Individual Personnel Data

This chapter and the next describe how to enter or edit data about individuals who are working with the Organisation, or joining one of its activities. This chapter covers all individual data entered through the Personnel system, except data about specific applications to join a campaign or conference or for longer term work with the Organisation (applications are explained in the next chapter). Since some basic data about an individual is entered in the Partner System (using the record of class Person), this chapter begins by summarising the different items of data, and where they are entered. The remaining part explains how to enter all the data items using the *Individual Data Screen*. There is a Personnel Data Shepherd, which provides a simple way of entering the most important items of data, and this is introduced later.

2.1 Individual Personnel Data - Where do I find it?

Although this chapter explains Personnel data, there is some use of data that is entered in the Partner System. Data relating to an individual who is participating in one of the Organisation's activities may be entered in a number of different places, as follows.

- **Partner Edit Screen (Family record):** basic address information, subscriptions, special type, bank accounts, relations, contacts, reminders.
- **Partner Edit Screen (Person record):** Many of the same items as for the Family, but related to the person, but also a little more individual information, like gender, date of birth and occupation.
- **Personnel System, *Individual Data Screen*:** all remaining individual data, both longer-term data and short-term data relating to individual campaign applications, etc.

Figure 2-1, page 14, summarises the main data items and the module area to which they belong. Remember to follow local office practice regarding what is entered on a Person record and what on a Family record.

Since it could be quite confusing knowing which items of data are essential, several Shepherds have been written to help guide you through the process. Currently there is one Shepherd that relates to general Personnel Data (the subject of this chapter) and two which cover different types of short-term application (see section 3.3, page 44). These Shepherds automatically take you to the correct place. So, for example, when entering an application for a completely new partner, the Shepherd will automatically take you to the Partner System to enter address information etc.

Some basic information must be entered through the Partner Module before the *Individual Data Screen* in the Personnel module can be used. This 'partner data' includes address, language, occupation, relationships (i.e. to churches, parents, children, and prayer secretaries), Family links (parents and children) and also date of birth. These are shown in the upper part of Figure 2-1.

This chapter explains how to access personnel data screens in order to enter or edit the information items in the lower box in the figure. Information about specific applications is covered in Chapter 3, page 37.

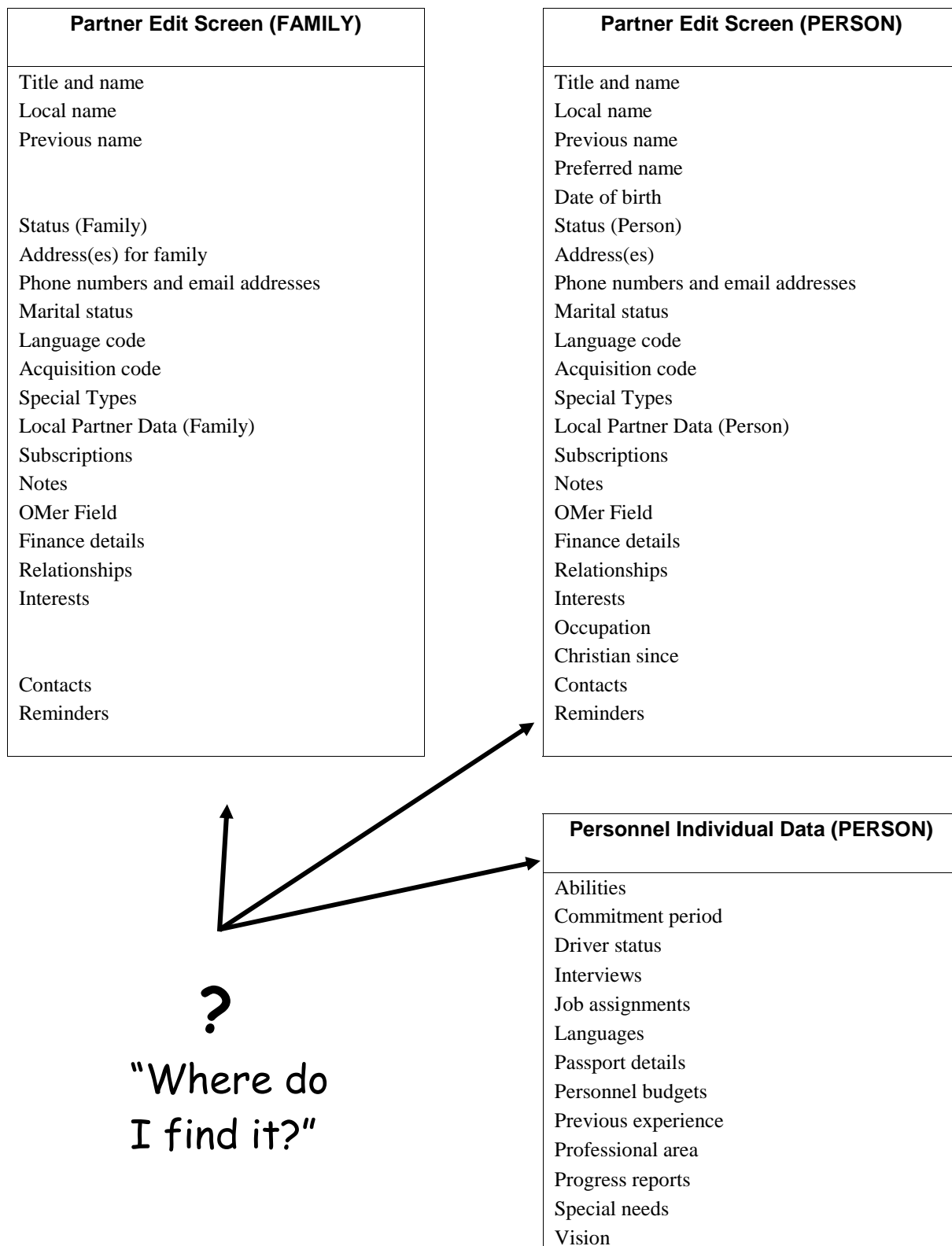


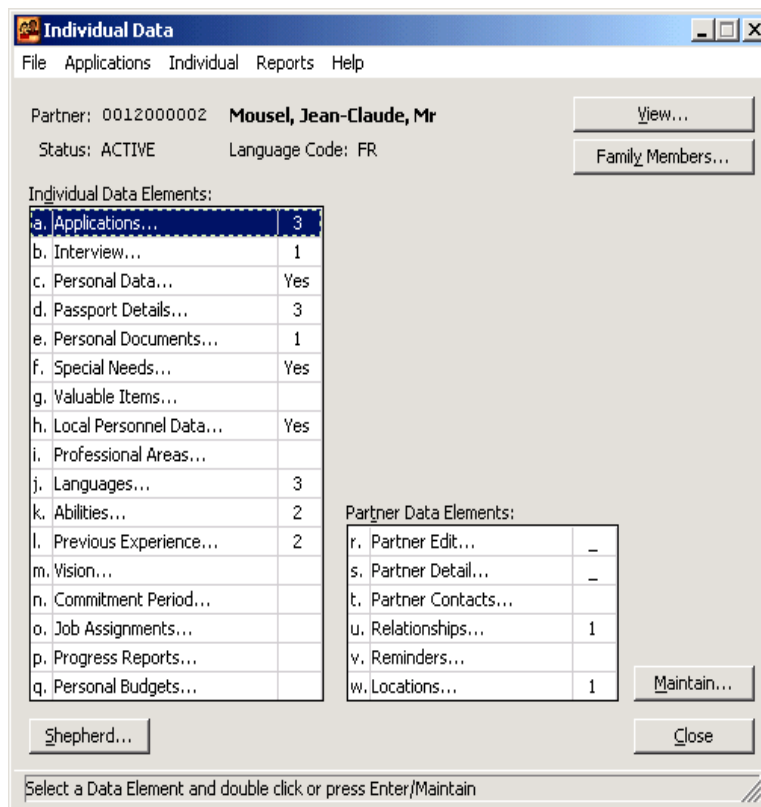
Figure 2-1 Summary of data items about a person, showing where the different items are entered.

2.2 Entering Permanent Individual Data

This section deals with entering (or editing) individual personnel data for a partner who already exists on your PETRA installation. If you are entering a completely new partner, then either use the Partner

System first, or, in the case of people who are actually applying to join the Organisation, the Application Shepherds (see next chapter).

1. On the menu bar of the *Personnel Welcome Screen*, select individuals, then Person. (If you have just worked with the partner, you can select Work with Last Partner.) A *Person Find Screen* appears. Use the Find screen to locate and highlight the Person whose data you wish to update, and click Accept. The *Individual Data Screen* for this person appears.



Individual Data

File Applications Individual Reports Help

Partner: 0012000002 **Mousel, Jean-Claude, Mr** View...

Status: ACTIVE Language Code: FR Family Members...

Individual Data Elements:

a. Applications...	3
b. Interview...	1
c. Personal Data...	Yes
d. Passport Details...	3
e. Personal Documents...	1
f. Special Needs...	Yes
g. Valuable Items...	
h. Local Personnel Data...	Yes
i. Professional Areas...	
j. Languages...	3
k. Abilities...	2
l. Previous Experience...	2
m. Vision...	
n. Commitment Period...	
o. Job Assignments...	
p. Progress Reports...	
q. Personal Budgets...	

Partner Data Elements:

r. Partner Edit...	-
s. Partner Detail...	-
t. Partner Contacts...	
u. Relationships...	1
v. Reminders...	
w. Locations...	1

Shepherd... Close

Select a Data Element and double click or press Enter/Maintain

Figure 2-2 Individual Data Screen - the starting point for entering all Personnel data

This screen is the starting point for entering or updating all Personnel Data.

Individual Data Elements The list on the left indicates the various elements of Personnel data (sometimes several items are in one group). To maintain any item on the list, select it and then click the **Maintain** button (or just double-click the item). Each item is explained in the sub-sections below, with the exception of Applications, which are considered in the next chapter.

Partner Data Elements The second list, on the right, refers to items which are part of the Partner system, but which it is often useful to edit from this screen.

Shepherd The **Shepherd** button starts the Personnel Data Shepherd, which provides a quick way of amending most of the important items. This Shepherd is described in section 2.3, page 31.

View The **View** button brings up a single screen which summarises certain key data.

Family Members If you click this button, a list appears of all the family members of the partner whom you are editing, sorted by Family ID (see Partner User Guide, Family Members). This allows you to switch to the *Individual Data Screen* of any other member of the family, making it easy to update the records of all members of a family at the same time.

The right-hand column in each lists shows whether entries have already been made in the categories shown. For example, in the example of Figure 2-2, it can be seen that some Personal details have been added, details of 2 passports have been entered, etc.

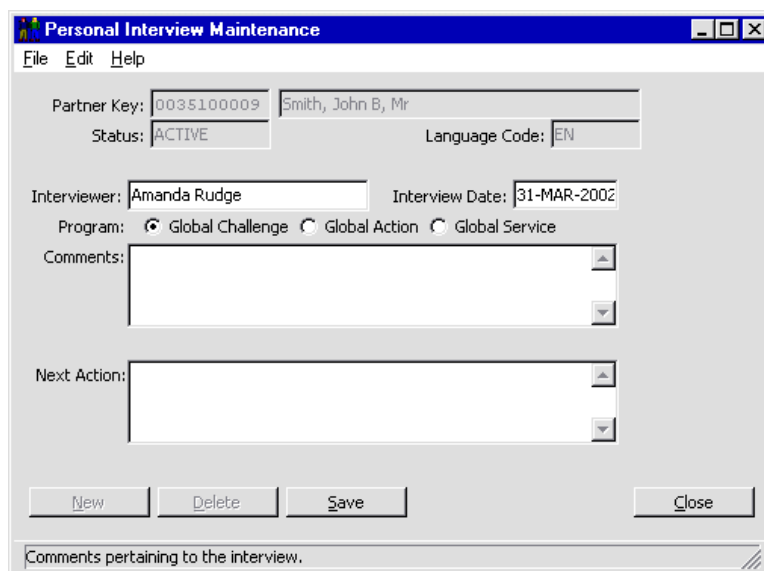
Tip - Short-cuts To move quickly to an item in the lists, just type the letter shown to the left of the item. For example typing 'm' will take you to Commitment Period.

2.2.1 Interviews

The Interview function keeps a record of interviews held by the Sending Field before an applicant joins the Organisation. To enter details of an interview,

1. From the *Individual Data Screen* (Figure 2-2, page 15), double click Interviews. The *Personal Interview List Screen* appears. To edit a previous interview, highlight it and click **Edit**; to enter a new interview, click **New**. The *Personal Interview Screen* appears.

Figure 2-3 Personal Interview Screen



2. Enter the name of the **Interviewer** and the **Interview Date**. Select the **Program** for which the applicant is applying. Make a note of **Comments** and the **Next Action** to be taken.
3. Click **Save**, then **Close** (or **New** to enter another record for this partner.). Click **Close** again to return to the *Individual Data Screen*.
4. **Printing an Interview Report** If you select File > Print, you will only print a record of the fact that an interview occurred; the Comments and Next Actions are not printed. To print this too, select File > Print Details.

2.2.2 Personal Data

Note In addition to the items described here, Personal Data used to include several fields which could be defined by the local office. These fields are now included in **Local Personnel Data** (see page 21).

The *Personal Data Screen* allows you to enter driving license details. To enter Personal Data, follow the instructions below.

1. On the menu bar of the *Personnel Welcome Screen*, select individuals, then Person. (If you have just worked with the partner, you can select Work with Recent Partners.) A *Person Find Screen* appears. Use the Find screen to locate and highlight the Person whose data you wish to update, and click **Accept**. The *Individual Data Screen* for this person appears.
2. From the *Individual Data Screen* (Figure 2-2, page 15), double click Personal Data. The *Personal Data Screen* appears.

Emergency Contacts can be viewed from this screen. Click the **Emergency Contact** buttons (marked in Figure 2-4) to see the contact details.

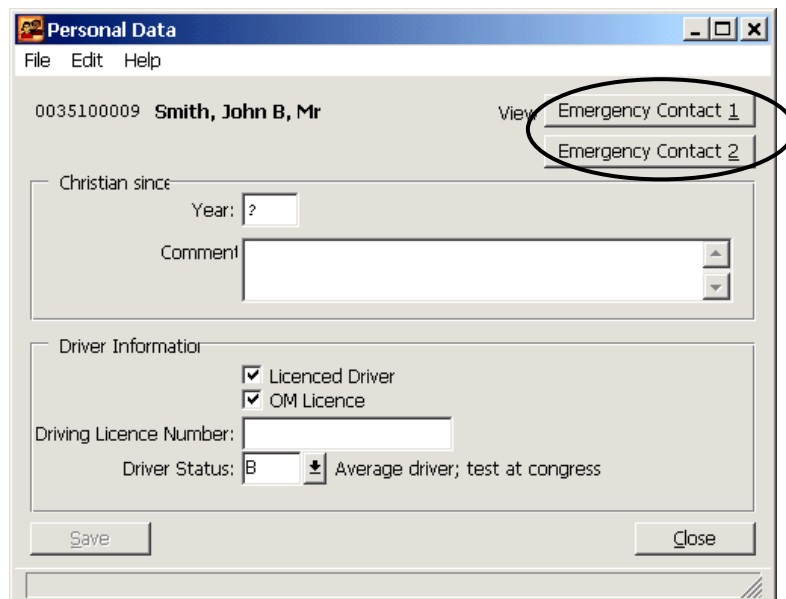


Figure 2-4 Personal Data Screen

3. Enter Data as follows

Chr'n since If required, a **Year** and **Comment** can be entered. **Warning** - This may be sensitive information.

Licensed Driver Check the box if the person has a valid driving license. Enter the number in **Driving License Number**.

OM License Check the box if the person has passed an OM driving test.

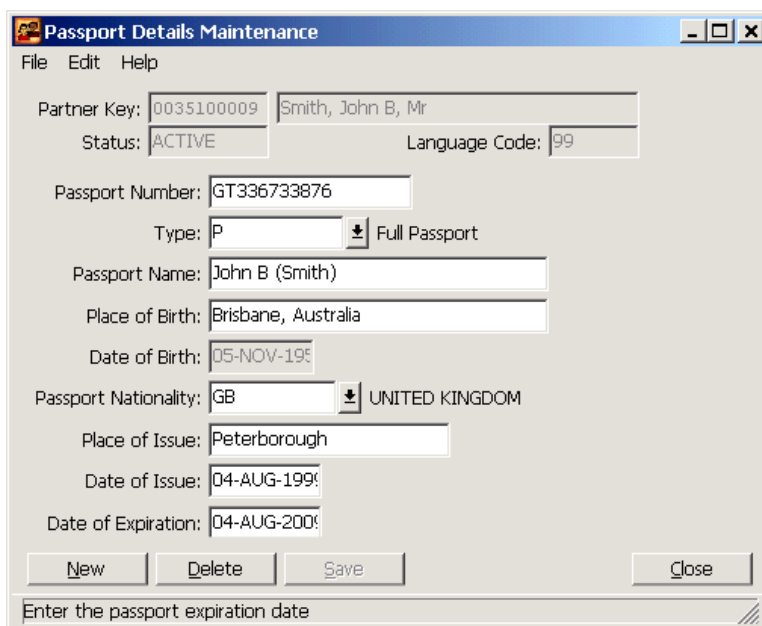
Driver Status Select the appropriate option. For drivers who are believed to be acceptable, but have not taken an OM driving test, select one of the options for 'Test at Conference'.

4. Click **Save**, then **Close**. Click **Close** again to return to the *Individual Data Screen*.

2.2.3 Passport Details

Use the *Passport Details Screen* to store a passport record for each passport an individual owns.

1. From the *Individual Data Screen* (Figure 2-2, page 15), double click **Passport Details**. The *Passport List Screen* appears. To edit a previous passport entry, highlight it and click **Edit**; to enter a new passport, click **New**. The *Passport Details Screen* appears.



The screenshot shows a 'Passport Details Maintenance' window with the following fields and values:

- Partner Key: 0035100009
- Smith, John B, Mr
- Status: ACTIVE
- Language Code: 99
- Passport Number: GT336733876
- Type: P (Full Passport)
- Passport Name: John B (Smith)
- Place of Birth: Brisbane, Australia
- Date of Birth: 05-NOV-1995
- Passport Nationality: GB (UNITED KINGDOM)
- Place of Issue: Peterborough
- Date of Issue: 04-AUG-1996
- Date of Expiration: 04-AUG-2004

Buttons at the bottom: New, Delete, Save, Close.

Footer text: Enter the passport expiration date

Figure 2-5 Passport Details List Screen

2. Enter the following passport data:

Passport Number Enter the Passport Number in the box provided.

Passport Type Select the Passport Type using the menu button.

Passport Name When you tab into this box, a small screen appears suggesting an appropriate format. If this is appropriate, click **OK**. If you do not want to use the selected name, edit it and then click **OK**. The Family name must be put in brackets (). To allow consistency with OMSS, the recommended name order is: first name, second name, (family name), e.g. John B (Smith).

Place of Birth Enter the place of birth stated on the passport, in the form of "Town, Country" (e.g. Brisbane, Australia)

(Date of Birth This is entered in the Partner Module. See the PARTNER USER GUIDE.)

Passport Nationality Enter the country for which this is a passport. So, for a Canadian passport, select Canada, even if the passport was actually issued at the Canadian embassy in Spain.

Place of Issue Enter the town/city where the passport was issued.

Date of Issue and Date of Expiration Enter the Date on which the passport was issued and the date on which it will expire.

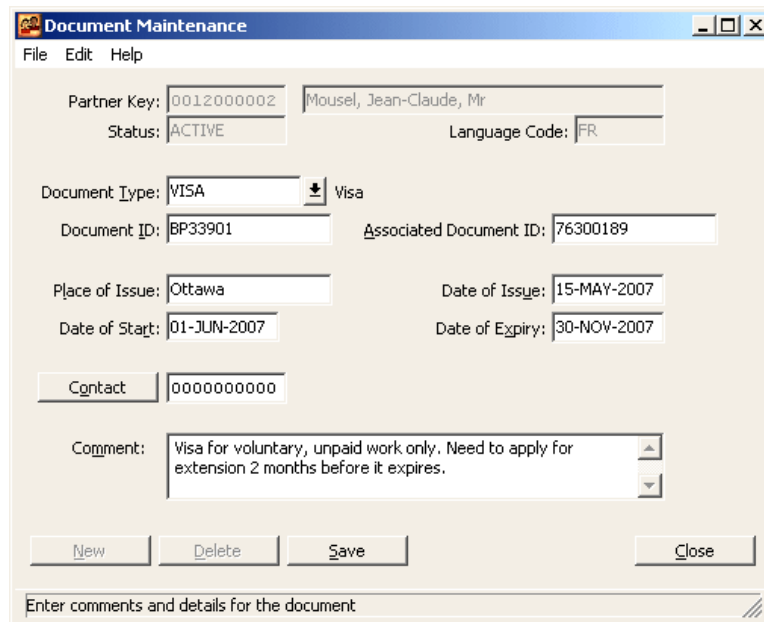
3. Click **Save**, then **Close** (or **New** to enter another record for this partner.). Click **Close** again to return to the *Individual Data Screen*.#

2.2.4 Personal Documents

Use Personal Documents to record details of other key documents, such as health insurance, visas, etc.

1. From the *Individual Data Screen* (Figure 2-2, page 15), double click **Personal Documents**. The *Personal Documents Maintenance Screen* appears.

Figure 2-6 Personal Documents Maintenance Screen



2. Enter special needs data as required:

Document Type Select the type of document. These are set up in the Personal Documents Table (6.3.5, page 89.)

Document ID and Associated Document ID Enter the reference numbers.

Place of Issue, Date of Issue, Date of Start, Date of Expiry Enter the appropriate dates..

Contact If there is a partner who is a contact for this, click **Contact** to bring up a find screen. An example might be the insurance company who issues a health insurance document.

Comment Add any comments that will be helpful in the future.

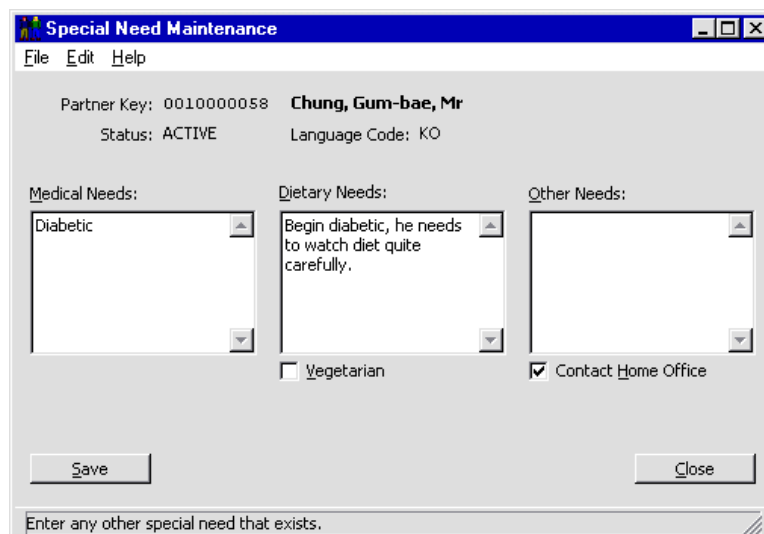
3. Click **Save**, then **Close**. Click **Close** again to return to the *Individual Data Screen*.

2.2.5 Special Needs

Use the *Special Needs Maintenance Screen* to record any special medical, diet or other needs.

1. From the *Individual Data Screen* (Figure 2-2, page 15), double click Special Needs. The *Special Need Maintenance Screen* appears.

Figure 2-7 Special Needs Maintenance Screen



2. Enter special needs data as required:

Warning Information held on PETRA cannot always guaranteed to be secure or confidential. Often, due to the sensitivity of such data, the information should be held confidentially at the Sending Field, and not entered on PETRA.

Medical Needs Enter whatever information needs to be recorded.

Dietary Needs Enter any necessary information about special food that this person might need for medical reasons.

Contact Sending Field If sensitive or confidential information is held at the Sending Field then do not enter the information but check this box.

Other Needs Enter any other special information not covered by the first two boxes.

3. Click **Save**, then **Close**. Click **Close** again to return to the *Individual Data Screen*.

2.2.6 Valuable item

Use the *Valuable Item Maintenance Screen* to record details of valuable items owned and carried by an individual working with the Organisation. This is particularly important for individual's travelling internationally within teams where customs records need to be kept (e.g. on ships). Any number of valuable items may be recorded, each as a separate valuable item record.

1. From the *Individual Data Screen* (Figure 2-2, page 15), double click **Valuable Item**. The *Valuable Items List Screen* appears. To edit a previous entry, highlight it and click **Edit**; to enter a new item, click **New**. The *Valuable Items Screen* appears.

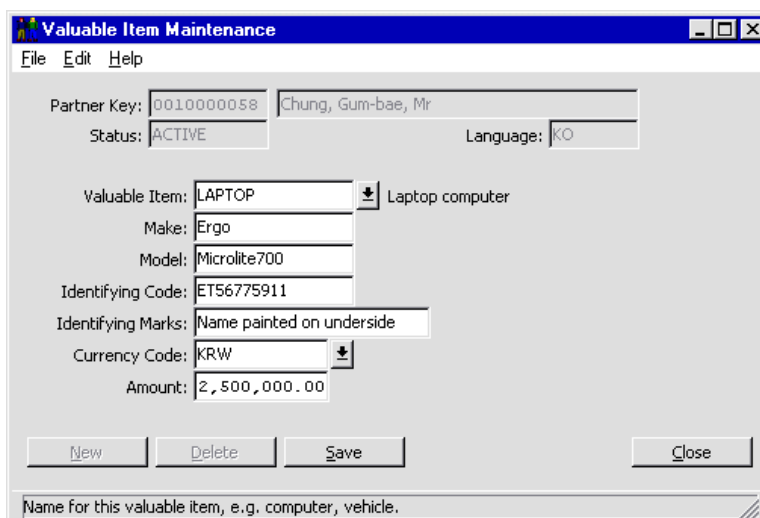


Figure 2-8 Valuable Item Maintenance Screen

2. Enter data as required:

Valuable Item Select the type of Valuable Item from the drop-down list. If the item is not there it may be useful to add it to the Valuable Items Table.

Make Enter the Make. This will normally be the name of the manufacturer.

Model Enter the Model name or number.

Identifying Code Enter the Identifying Code of the valuable item. This will normally be the serial number, which uniquely identifies this item from others of the same type.

Identifying Marks Enter details of any Identifying Marks on the valuable item. This is useful if the item has no identifying code. Identifying marks include any inscriptions, engravings or possibly minor damage which helps to identify the item.

Currency Code Use the button to select the Currency Code which is used to value the item.

Amount Enter the value of the item, using the currency selected above.

- Click **Save**, then **Close** (or **New** to enter another record for this partner.). Click **Close** again to return to the *Individual Data Screen*.

2.2.7 Local Personnel Data

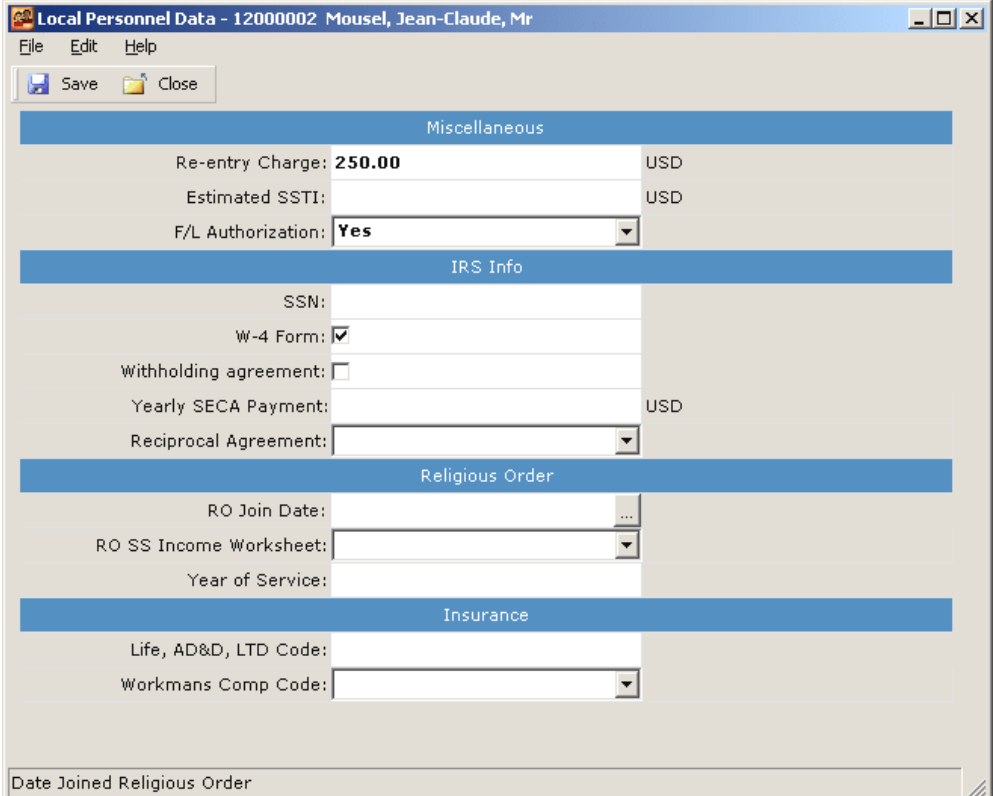
Note Local Personnel Data replaces the items previously known as **Office Specific Data** and the locally definable labels of **Personal Data**.

Local Personnel Data records are for storing personnel data which is only relevant to one office, and which will not therefore be exported to another office. The Local Personnel Data described here relates to personnel data for an individual. There is also Local Application Data, which relates to specific Applications (see section 3.4, page 47 for long-term applications) and Local Partner Data, used in the Partner Module.

Section 6.3.9, page 92, describes how the actual fields are set up by an office to meet its needs.

- From the *Individual Data Screen* (Figure 2-2, page 15), double click Local Personnel Data. The *Local Personnel Data Screen* appears.

Figure 2-9 Example of Local Personnel Data Screen (In this case, four different categories have been defined, and several data fields set up in each category.)



Local Personnel Data - 12000002 Mousel, Jean-Claude, Mr

File Edit Help

Save Close

Miscellaneous

Re-entry Charge: **250.00** USD

Estimated SSTI: USD

F/L Authorization: **Yes**

IRS Info

SSN:

W-4 Form: ☒

Withholding agreement: ☐

Yearly SECA Payment: USD

Reciprocal Agreement:

Religious Order

RO Join Date: ...

RO SS Income Worksheet:

Year of Service:

Insurance

Life, AD&D, LTD Code:

Workmans Comp Code:

Date Joined Religious Order

The labels on the left represent the fields that your office has set up. The blue bands are headings for the different categories.

- Enter data as required. The fields may be of different types, such as Text, Date, Number or Drop-down option lists.
- Click **Save**, then **Close**. Click **Close** again to return to the *Individual Data Screen*.

2.2.8 Professional Areas

Use the *Professional Areas Screen* to record details of professional qualifications and experience. Any number of professions may be recorded.

1. From the *Individual Data Screen* (Figure 2-2, page 15), double click Professional Areas. The *Professional Areas List Screen* appears. To edit a previous entry, highlight it and click Edit; to enter a new professional area, click New. The *Professional Areas Screen* appears.

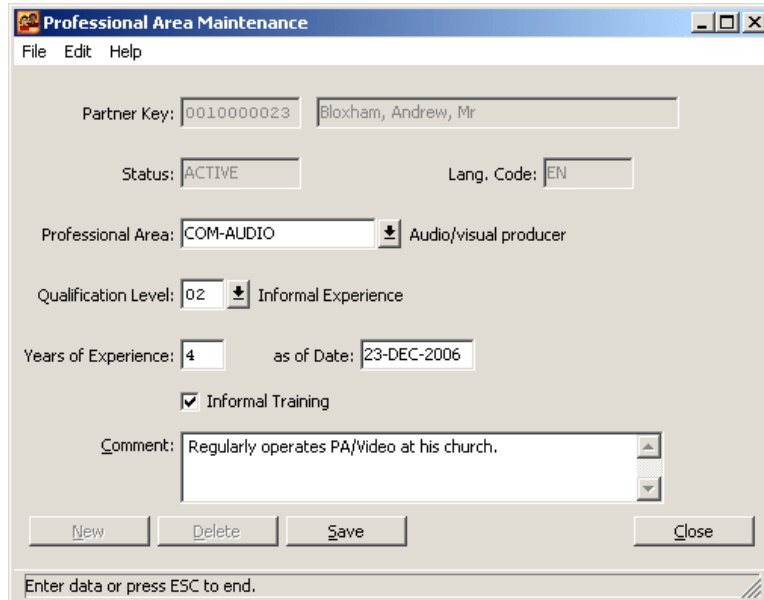


Figure 2-10 Professional Area Maintenance Screen

2. Enter data as required:

Professional Area Select the Professional Area which is most appropriate using the menu button. (To print a complete list of options follow the menu items from the Main Personnel Screen -> Maintain Tables -> General Tables -> Professional Area -> File -> Print.)

Qualification Level Select the highest Qualification Level the person has in this profession using the menu button.

Years of Experience Enter the number of completed years of experience the person has in this profession, and in the **as of Date** box enter the date on which this number was correct.

Informal Training If the person learned this profession without formal training then check the box.

Comment If required a comment can be added.

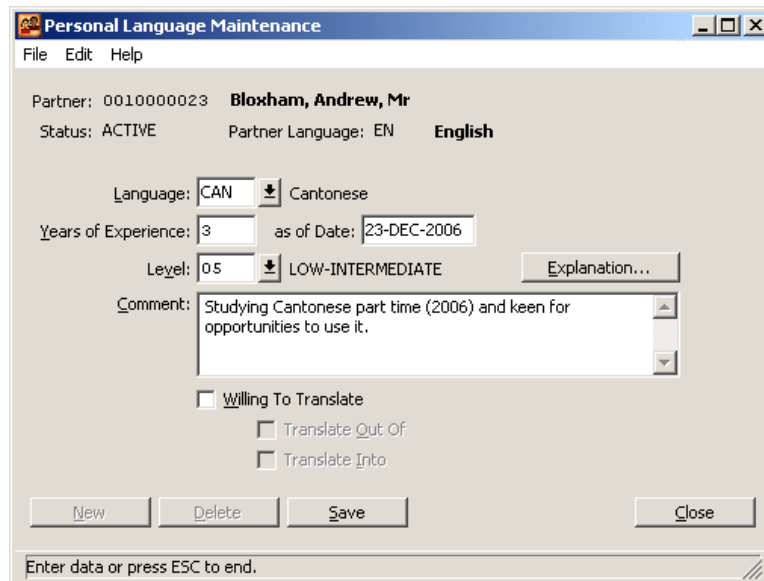
3. Click **Save**, then **Close** (or **New** to enter another record for this partner.). Click **Close** again to return to the *Individual Data Screen*.

2.2.9 Languages

Use the *Personal Language Maintenance Screen* to hold details of personal language skills and experience. Any number of languages may be recorded, each as a separate language record. In general the first language (**mother tongue**) is not recorded here; it is entered on the Person record from the *Partner Edit Screen*, Maintain > Additional detail.

1. From the *Individual Data Screen* (Figure 2-2, page 15), double click Language. The *Language List Screen* appears. To edit a previous entry, highlight it and click Edit; to enter a new language, click New. The *Personal Language Screen* appears.

Figure 2-11 Personal Language Maintenance Screen



2. Enter data as required:

Language Select the Language in which the person has some experience.

Years of Experience Type the number of Years of Experience with this language, and in the **as of Date** box enter the date that this number of years was true (normally today).

Language Level Select the person's level of ability in this language using the menu button. For a definition of the Language Level chosen, click on the **Explanation** button and an information box appears, which describes this Language Level.

Comment If required a comment can be added.

Willing to Translate Check this box if the person has said that they are willing and able to use this language to translate in a public setting.

Translate Into and Translate Out Of If the Willing to Translate box is checked, then two other boxes are available. Click the Translate Into box if the person is able to translate from their first language (shown as Partner Language at the top of the screen) into this language. Click the Translate Out Of box if the person is able to translate from this new language into their first language.

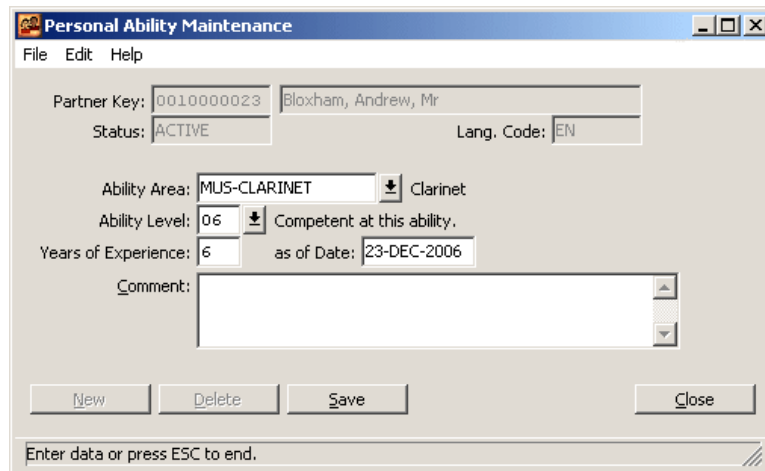
3. Click **Save**, then **Close** (or **New** to enter another record for this partner.). Click **Close** again to return to the *Individual Data Screen*.

2.2.10 Abilities

Use the *Personal Ability Maintenance Screen* to record details of skills and abilities a person possesses. This includes such things as musical abilities, special ministry skills, practical and office skills. Any number of personal abilities may be recorded for one partner.

1. From the *Individual Data Screen* (Figure 2-2, page 15), double click **Abilities**. The *Abilities List Screen* appears. To edit a previous entry, highlight it and click **Edit**; to enter a new ability, click **New**. The *Personal Ability Screen* appears.

Figure 2-12 Personal Ability Maintenance Screen



2. Enter data as required:

Ability Area Select the Ability Area which you wish to record using the menu button. (To print a complete list of options follow the menu items from the *Main Personnel Screen* > Maintain Tables > General Tables > Ability Area > File > Print.)

Ability Level Use the menu button to select the Ability Level which best describes the person's competence in this ability.

Years of Experience Type the number of years of experience in this ability, and in the **as of Date** box enter the date that this number was true (normally today).

Comment Use this field to record any key notes relating to this ability.

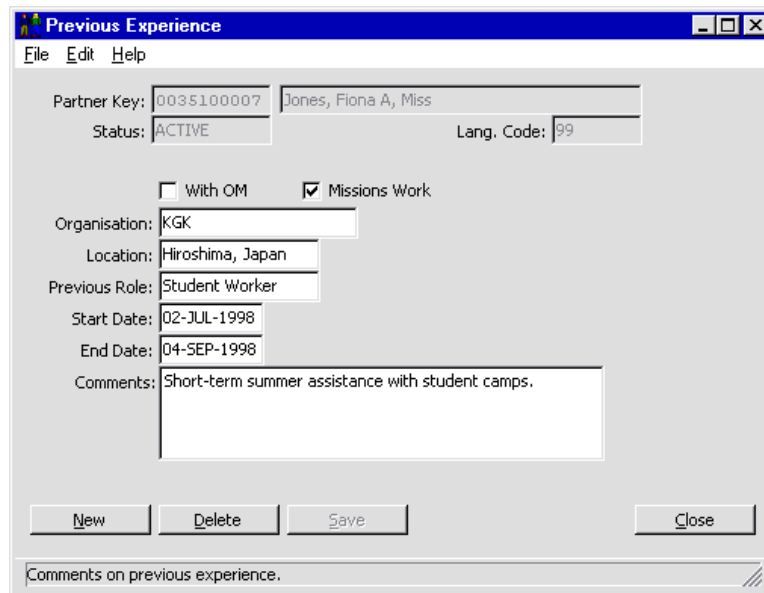
3. Click **Save**, then **Close** (or **New** to enter another record for this partner.). Click **Close** again to return to the *Individual Data Screen*.

2.2.11 Previous Experience

Previous Experience allows you to record any relevant experience which the partner has, which may be useful in the future (for example if you want to find someone who can give advice on a particular issue.) Any number of previous experiences may be recorded for a partner. To enter an experience:

4. From the *Individual Data Screen* (Figure 2-2, page 15), double click Previous Experience. The *Previous Experience List Screen* appears. To edit a previous entry, highlight it and click Edit; to add a new entry, click New. The *Previous Experience Screen* appears.

Figure 2-13 Previous Experience Maintenance Screen, showing typical data



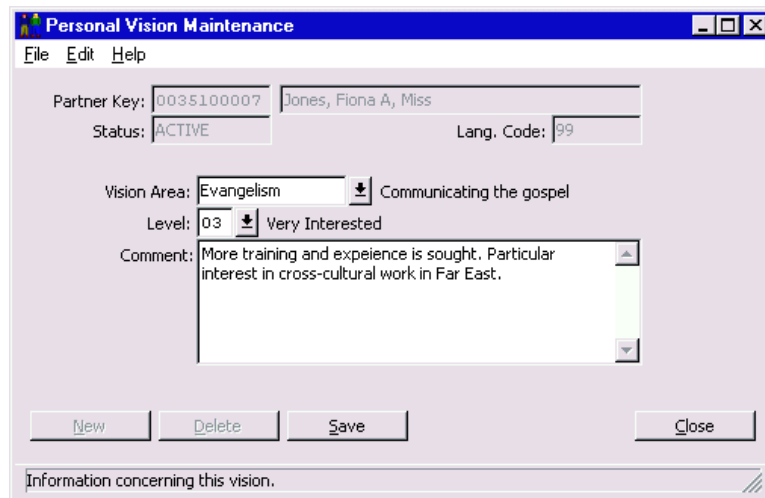
5. Enter data as required:
 - With OM** Check the box if the previous experience was within OM.
 - Missions Work** Check the box if the previous experience was in some sort of missions work.
 - Organisation** Enter the name of the organisation with whom the person was working.
 - Location** Enter the country or Field where this experience was gained.
 - Previous Role** Enter the post or position held within the organisation. If several different roles were held it may be best to enter these as separate previous experience records.
 - Start Date** and **End Date** Enter the dates relating to this previous experience.
 - Comments** Enter any additional comments about the previous experience (e.g. responsibilities held or special projects carried out).
6. Click **Save**, then **Close** (or **New** to enter another record for this partner.). Click **Close** again to return to the *Individual Data Screen*.
7. If the person has had more than one relevant past experience, further past experience records can be added by clicking the **New** button and repeating steps 1 - 3. There is a **New** button on both the *Past Experience List Screen* and on the *Past Experience Maintenance Screen* and both have the same effect.
8. When you have finished entering previous experience details click **Close** until you return to the *Individual Data Screen*.

2.2.12 Vision

Vision(s) are a person's ambitions and goals for the future, normally relating to an area of ministry that they wish to develop. Several different visions may be recorded, each as a separate vision record.

1. From the *Individual Data Screen* (Figure 2-2, page 15), double click **Vision**. The *Vision List Screen* appears. To edit a previous entry, highlight it and click **Edit**; to add a new entry, click **New**. The *Vision Screen* appears.

Figure 2-14 Personal Vision Maintenance Screen



2. Enter data as required:

Vision Area Select the Vision Area using the menu button. If the particular vision that you wish to enter is not on the list, select Other, and describe in the Comments box.

Vision Level Select the Vision Level for this vision using the menu button.

Comments Enter additional details to explain the vision if necessary.

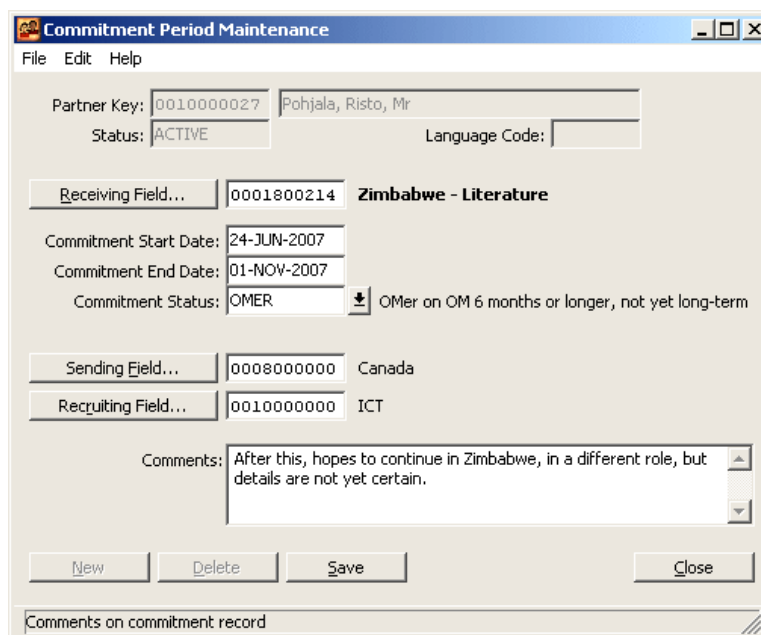
3. Click **Save**, then **Close** (or **New** to enter another record for this partner.). Click **Close** again to return to the *Individual Data Screen*.

2.2.13 Commitment Period

A **Commitment Period** is a period of time that a person has agreed to serve in a particular Field. Sometimes a person may have several valid commitments. For example, they may be working in Greece until 30 June, then helping with a special Campaign from 1 July to 15 September and then joining a team in Thailand from 16 September. Once all this has been agreed with the different Fields, they will have three Commitment Periods and each one is entered in PETRA as a separate commitment period record.

1. From the *Individual Data Screen* (Figure 2-2, page 15), double click **Commitment Period**. The *Commitment Period List Screen* appears. To edit a previous entry, highlight it and click **Edit**; to add a new entry, click **New**. The *Commitment Period Screen* appears.

Figure 2-15 Commitment Period Maintenance Screen



2. Enter data as required:

Receiving Field Select the Receiving Field for the job commitment by clicking the button and finding the correct Unit. The Receiving Field is the Field that the person will join for this commitment.

Commitment Start Date and Commitment End Date Enter the Commitment Start Date and Commitment End Date in the boxes provided. If you enter an End Date which is today's date or earlier, this means that this Commitment has already finished. A dialogue box will ask you if you wish this information to be used to create a Previous Experience record (see section 2.2.11, page 24).

Commitment Status Select the OM Status using the menu button. This is the OM status that will apply for the commitment that you are entering.

Sending Field Select the Sending Field (formerly known as Home Office).

Recruiting Office If the person was recruited by a Field which is different from the Sending Field, select this office.

Comments Enter any further details about the Commitment Period.

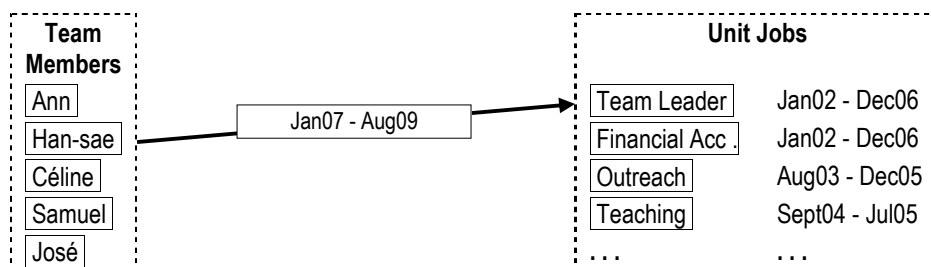
3. Click **Save**, then **Close** (or **New** to enter another record for this partner.). Click **Close** again to return to the *Individual Data Screen*.

2.2.14 Job Assignments (including Caleb Roles)

Use the *Job Assignment Maintenance Screen* to record the positions or responsibilities a person may have within a unit (Team or Field). Jobs may be full or part-time jobs (eg Teacher) but some may be Roles (eg an area of responsibility which may not necessarily be a main job.) Jobs can be set up for a unit as described in section 4.5, page 57, However, Petra can also set them up when an assignment is made, if they do not exist already. A separate job assignment record should be used for each job/role held in the unit. Figure 2-16 illustrates Job assignment.

Job assignment is especially important for the special Roles used in the Caleb system, to which PETRA exports data. For example, in Figure 2-16, Team Leader is a Caleb Role. During the period that Han-sae is assigned to this role (Jan 07 - Aug 09) he will be able to access information on Caleb that is appropriate for the Team Leader. Job assignments are exported periodically to Caleb to keep the access rights up-to-date (see the section on Caleb Export in the GENERAL USER GUIDE.)

Figure 2-16 Example of job Assignment. Han-Sae has been assigned Team Leader for the period Jan'02 to Aug'04.



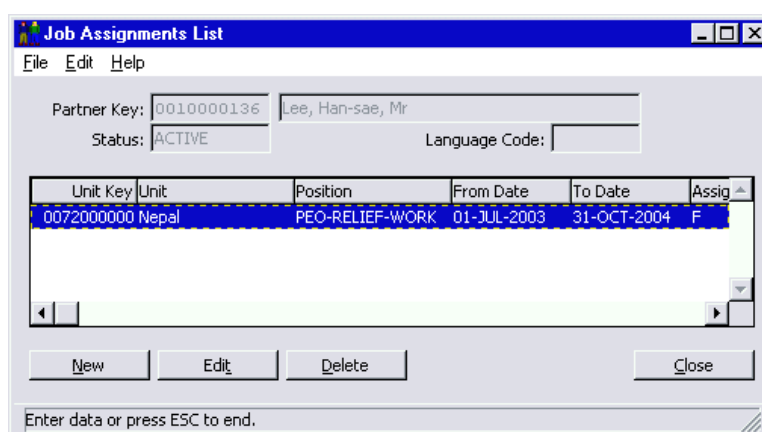
The following points are important.

- A person can be assigned to more than one Job/Role
- If a person is to be assigned to a Job/Role, then that Job must be created for the unit in which it applies. If the job does not exist already for the unit when you assign someone to it, PETRA offers to create it.
- The dates of the assignment needs to be given, but they do not need to be the same as the dates for which the job exists in the unit.

To assign someone to a role:

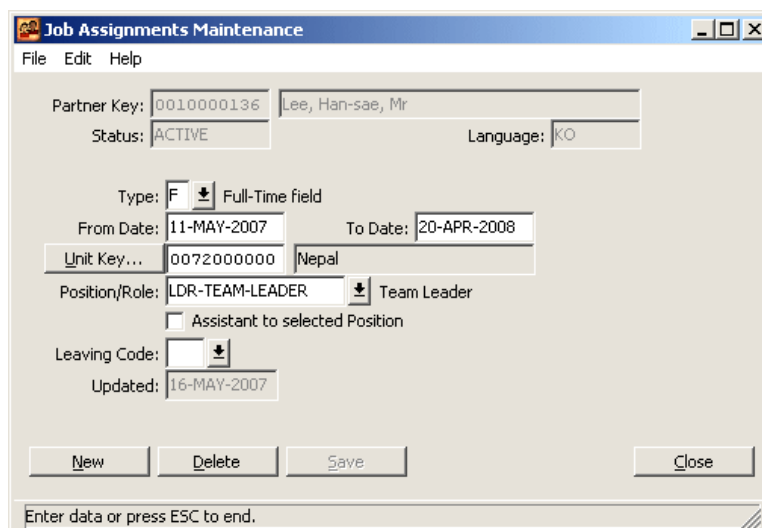
1. From the *Individual Data Screen* for the person to be assigned (Figure 2-2, page 15), double click Job Assignments. The *Job Assignments List Screen* appears, showing job assignments which have already been entered for this person.

Figure 2-17 Job Assignment Maintenance Screen



2. To edit a previous entry, highlight it and click **Edit**; to add a new entry, click **New**. The *Job Assignment maintenance Screen* appears.

Figure 2-18 Job Assignment Maintenance Screen. Since the job Team Leader has already been created for the unit Nepal, this position is shown in the lower portion of the screen.



3. Enter data as required:

Type Select the job assignment Type (eg full or part-time) using the menu button.

From Date and To Date Enter the start and finish dates for the job assignment.

Unit Key Identify the office where the job assignment is to be carried out by clicking on the menu button and finding the correct Unit.

Position Use the menu button to select an appropriate description of the Position to be held during the job assignment. When you select a position, then one or more entries may appear in the lower panel of the screen. These show jobs for the selected position that have already been set up in PETRA for that Unit (see section 4.5, page 57.) If the position has been entered more than once (for example with different dates), then it will appear more than once in the list.

Assistant If the job is as an assistant to one of the standard positions, check this box. Jobs as assistant are not normally defined separately.

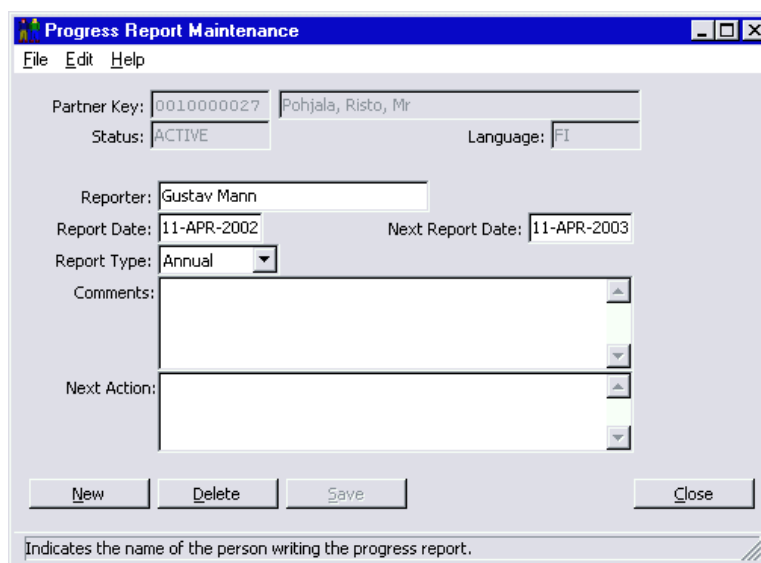
4. Click **Save**.
5. If you selected a position for which a job had been set up for that unit, then the job assignment is complete. Click **Close**. Click **Close** again to return to the *Individual Data Screen*. However, if no jobs had been set up for the position that you have selected, a warning message asks you if you wish to create a job of this position for this unit. If this is correct, click **Yes**. Further dialogue boxes will ask you to set the Job Type (see Figure 4-8, page 58.)

2.2.15 Progress Reports

Use the *Progress Report Screen* to keep a record of regular job evaluations carried out during and at the end of a person's commitment period. A separate progress report record should be used for each evaluation session.

1. From the *Individual Data Screen* (Figure 2-2, page 15), double click **Progress Reports**. The *Progress Reports List Screen* appears. To edit a previous entry, highlight it and click **Edit**; to add a new entry, click **New**. The *Progress Report Screen* appears.

Figure 2-19 Progress Report Screen



6. Enter data as required:

Reporter Enter the name of the person making the report.

Report Date and Next Report Date Enter the date of this progress report and the date in the future on which the next report should be made.

Report Type Select the Report Type using the menu button (eg annual, semi-annual).

Comments Use the Comments box to enter the main details of the report.

Warning In some countries there is a legal requirement to reveal all information held on a computer database about an individual to that individual if they should request it. Do not enter any information that you would not want the person to see.

Next Action Use the Next Action field to record the actions to be carried out as a result of this report.

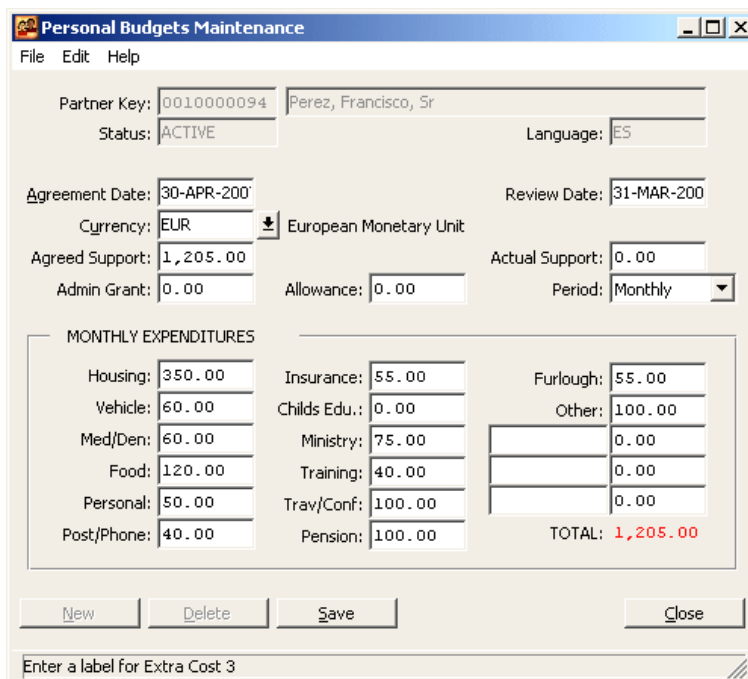
7. Click **Save**, then **Close**. Click **Close** again to return to the *Individual Data Screen*.

2.2.16 Personal Budgets

Use the *Personal Budgets Maintenance Screen* to record financial support arrangements for long term personnel. A number of separate 'Personal Budgets' records can exist at the same time, referring to different periods. This allows a record of old support figures to be kept even after figures are revised.

Note If a family or couple have a common budget it is not necessary to duplicate the same personnel records for every member of the family - the personnel records for one member of the family would normally be used.

1. From the *Individual Data Screen* (Figure 2-2, page 15), double click **Personal Budgets**. The *Personal Budget List Screen* appears. To edit a previous entry, highlight it and click **Edit**; to add a new entry, click **New**. The *Personal Budgets Screen* appears.



Personal Budgets Maintenance

File Edit Help

Partner Key: 0010000094 Perez, Francisco, Sr
 Status: ACTIVE Language: ES

Agreement Date: 30-APR-2007 Review Date: 31-MAR-2007
 Currency: EUR European Monetary Unit
 Agreed Support: 1,205.00 Actual Support: 0.00
 Admin Grant: 0.00 Allowance: 0.00 Period: Monthly

MONTHLY EXPENDITURES		
Housing: 350.00	Insurance: 55.00	Furlough: 55.00
Vehicle: 60.00	Childs Edu.: 0.00	Other: 100.00
Med/Den: 60.00	Ministry: 75.00	
Food: 120.00	Training: 40.00	
Personal: 50.00	Trav/Conf: 100.00	
Post/Phone: 40.00	Pension: 100.00	
		TOTAL: 1,205.00

New Delete Save Close

Enter a label for Extra Cost 3

Figure 2-20 Personal Budgets Maintenance Screen

2. Enter data as required:

Agreement Date Enter the date when the current long-term support figure was agreed. Also, in the **Review Date** box type the date when this support figure will next be reviewed.

Currency Select the Currency to be used in the Monthly Expenditure boxes using the menu button. This will normally be the currency of the country where the person is serving.

Agreed Support Enter the long-term support target figure, in your office's currency. This is the level of support which the person will attempt to get in each support Period (see 'Period' below).

Note You can change the currency type according to the needs of your office. To find out how to do that you need to go to FINANCE USER GUIDE.

Actual Support Enter the Actual Support in your office's currency. The Actual Support is the average amount of support received for this person in a support Period (see 'Period' below).

Admin Grant If the office is subsidising the person by an amount then type the amount in the Admin Grant box in your office's currency.

Allowance In the Allowance box enter the amount of regular living allowance, which is to be paid to this individual, in your office's currency. The figure entered should be the amount per support Period (see 'Period' below).

Period Select the support Period using the menu button. The support period is the period which applies to the Agreed Support, Actual Support, Admin Grant and Allowance figures above.

Monthly Expenditures Enter the appropriate figures in the currency selected above. When figures are typed in the Monthly Expenditure boxes the total monthly expenditure is automatically calculated and displayed as the **Total**. The table includes 3 fields at the end for which the labels are blank, and these can be used to note any other special items of expenditure (instead of just including them in the 'Other' category).

3. Click **Save**, then **Close**. Click **Close** again to return to the *Individual Data Screen*.

2.2.17 Partner Data Elements

The *Individual Data Screen* also allows direct access to a number of items of partner data, as listed in the Partner Data Elements list on the right of the screen (see Figure 2-2, page 15.) This allows a convenient way of entering or editing all relevant data from a single screen. The details of these screens are given in the PARTNER USER GUIDE, and mainly apply to the Person record; the following data elements often need to be added when entering Personnel Data for the first time.

Partner Edit Screen The Gender must be entered, and Special Types may need to be added.

Partner Detail Marital details and first language (mother tongue) need to be added.

Partner Contacts Gives direct access to partner system for recording a contact.

Relationships This must be used to add **Emergency Contact** details, and possibly **home supporting church**. Partner relationships are set up with these partners.

Reminders Gives access to partner system for setting up a reminder.

Locations When dealing with an application, a temporary address, such as a student's university address may need to be added.

2.3 Personnel Data Shepherd

Section 2.2 explained how to enter all the different elements of 'permanent' personal data (as opposed to the 'temporary' data relating to a specific application. (Of course there is not a clear distinction in all cases.) In practice it is often useful to update a number of items at one time, and the

Personnel Data Shepherd takes you through a number of the most important items. This Shepherd can also be used to review and edit data (unlike some of the other Shepherds, which you can only use to enter data for the first time.) To enter or edit personnel data using the Shepherd:

1. Select the Individual whose personal data you wish to maintain. From the *Individual Data Screen*, select Individual and then Enter/Update Data (with Shepherd), as shown below:

Figure 2-21 Upper part of Individual Data Screen showing Personnel Data Shepherd menu item



2. The Shepherd then takes you through a series of screens, each of which asks you for some items of data. The first Shepherd Screen is shown below.

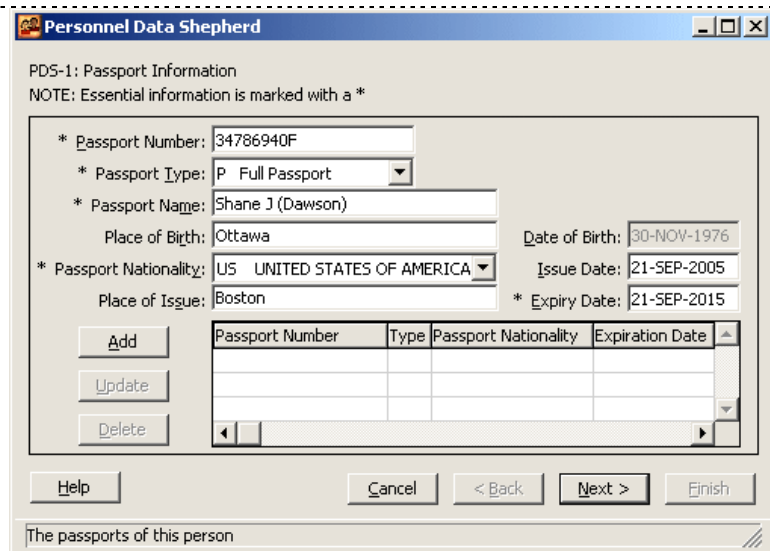
PDS-1 Passport Information

Enter all passport details in the upper 5 rows. The information marked with an asterisk (*) is essential, and must be entered. When you are ready, click the **Add** button. The information is then moved to the lower part of the screen. You can then enter a second passport if required.

To edit an existing passport, double-click it in the lower panel, and the data will appear in the top. Edit it and then click **Update**.

For additional information, see section 2.2.3, on page 17.

Click **Next >**.



PDS-1: Passport Information
NOTE: Essential information is marked with a *

* Passport Number: 34786940F
* Passport Type: P Full Passport
* Passport Name: Shane J (Dawson)
Place of Birth: Ottawa Date of Birth: 30-NOV-1976
* Passport Nationality: US UNITED STATES OF AMERICA Issue Date: 21-SEP-2005
Place of Issue: Boston * Expiry Date: 21-SEP-2015

Add Update Delete

Passport Number	Type	Passport Nationality	Expiration Date

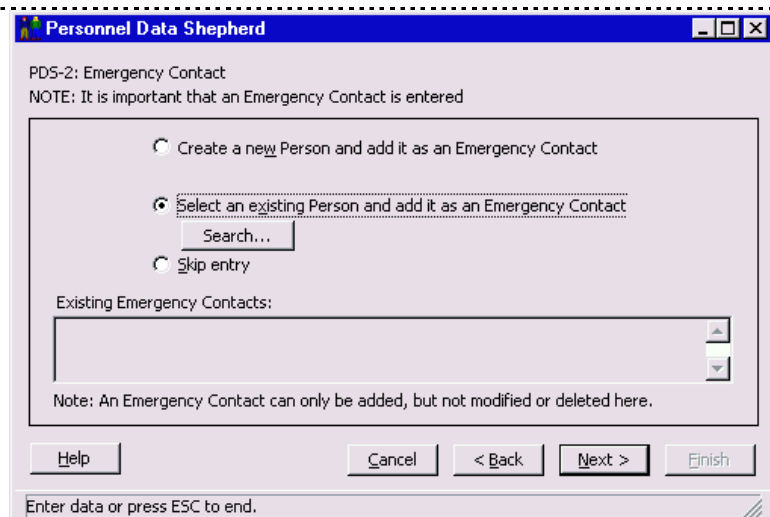
Help Cancel < Back Next > Finish

The passports of this person

PDS-2 Emergency Contact

There are three options. If you select the Create option, the new partner system will open, ready for you to enter a new partner of class Family, as the emergency contact. If you select the second choice and click the **Search** button, a Find screen opens to allow you to select an existing partner (the Find screen is set to Class Family, but this can be changed). If you Skip the Entry, no emergency contact will be entered.

For additional information, see the PARTNER USER GUIDE on Relationships.



PDS-2: Emergency Contact
NOTE: It is important that an Emergency Contact is entered

☐ Create a new Person and add it as an Emergency Contact
☒ Select an existing Person and add it as an Emergency Contact
☐ Skip entry

Search...

Existing Emergency Contacts:

Note: An Emergency Contact can only be added, but not modified or deleted here.

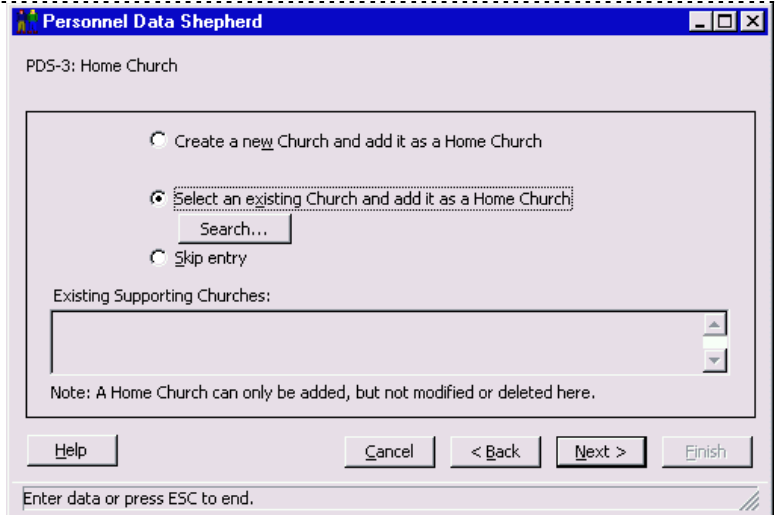
Help Cancel < Back Next > Finish

Enter data or press ESC to end.

PDS-3 Home Church

As with the previous screen, there are three options. You can Select an existing church, Create a new church as a partner, or Skip the entry. The selected church will have a relationship recorded.

For additional information, see the PARTNER USER GUIDE on Relationships.

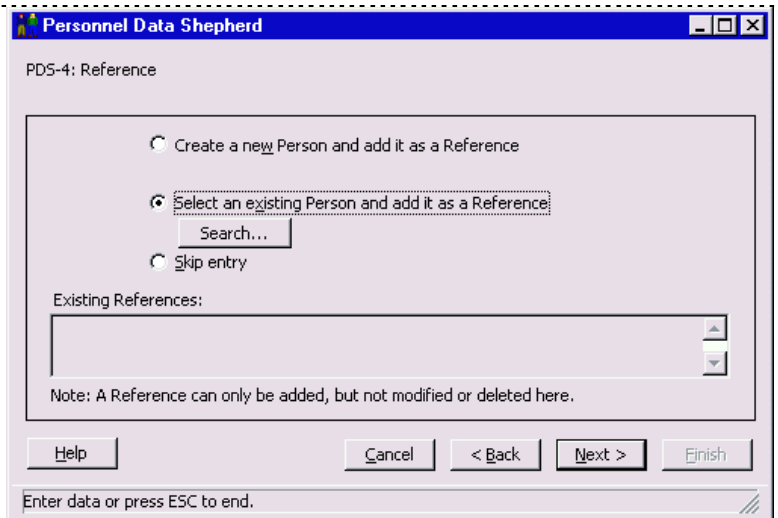


The screenshot shows the 'Personnel Data Shepherd' window with the title 'PDS-3: Home Church'. It contains three radio button options: 'Create a new Church and add it as a Home Church', 'Select an existing Church and add it as a Home Church' (which is selected), and 'Skip entry'. Below the options is a 'Search...' button. A list box labeled 'Existing Supporting Churches:' is empty. A note at the bottom states: 'Note: A Home Church can only be added, but not modified or deleted here.' At the bottom of the window are buttons for 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'. A status bar at the very bottom says 'Enter data or press ESC to end.'

PDS-4 Reference

Use the same options as with the previous screen to establish a relationship of type 'Reference' with a partner who gave a reference as to the suitability of this partner.

For additional information, see the PARTNER USER GUIDE on Relationships.



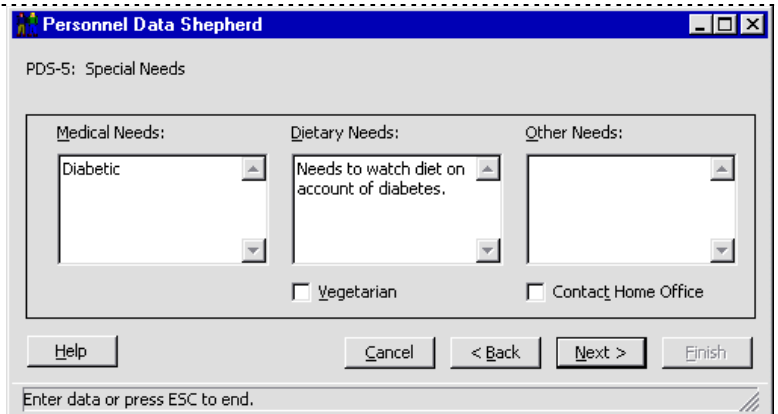
The screenshot shows the 'Personnel Data Shepherd' window with the title 'PDS-4: Reference'. It contains three radio button options: 'Create a new Person and add it as a Reference', 'Select an existing Person and add it as a Reference' (which is selected), and 'Skip entry'. Below the options is a 'Search...' button. A list box labeled 'Existing References:' is empty. A note at the bottom states: 'Note: A Reference can only be added, but not modified or deleted here.' At the bottom of the window are buttons for 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'. A status bar at the very bottom says 'Enter data or press ESC to end.'

PDS-5 Special Needs

Enter special needs if appropriate in the three boxes.

Warning Do not enter confidential, sensitive personal details into PETRA. Instead check the box labelled **Contact Sending Field**.

For more information see section 2.2.5, on page 19.



The screenshot shows the 'Personnel Data Shepherd' window with the title 'PDS-5: Special Needs'. It features three list boxes: 'Medical Needs:' (containing 'Diabetic'), 'Dietary Needs:' (containing 'Needs to watch diet on account of diabetes.'), and 'Other Needs:'. Below these are two checkboxes: 'Vegetarian' and 'Contact Home Office'. At the bottom of the window are buttons for 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'. A status bar at the very bottom says 'Enter data or press ESC to end.'

PDS-6 Previous Experience

This screen lets you to enter and edit records of previous experience.

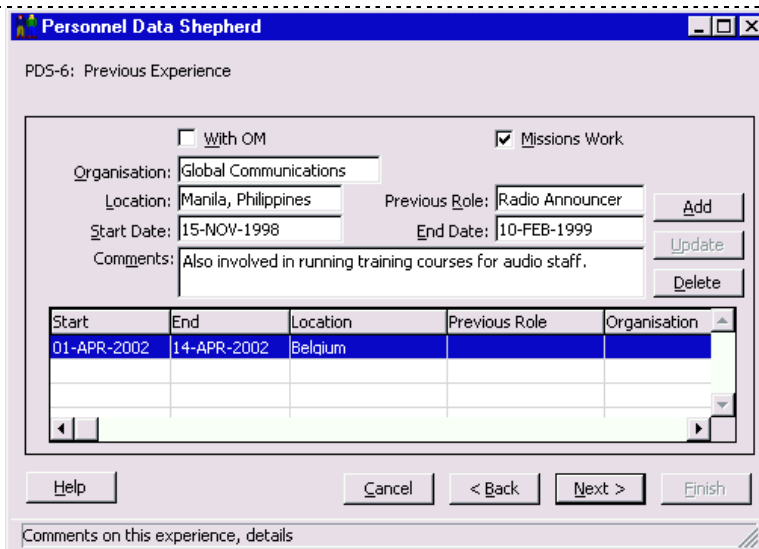
To enter a new record, fill in the boxes in the upper part of the screen and click **Add**.

The information is then transferred to the list in the lower part of the screen.

To edit an existing record, double-click it in the list. The information is then pasted to the top of the screen. After editing it, click **Update**. You must click **Update**; if you click **Add**, a new record will be pasted in.

To delete a record, select it and click **Delete**.

For more information, see section 2.2.11, on page 24.



Personnel Data Shepherd

PDS-6: Previous Experience

☐ With OM ☒ Missions Work

Organisation: Global Communications
 Location: Manila, Philippines
 Start Date: 15-NOV-1998
 Previous Role: Radio Announcer
 End Date: 10-FEB-1999
 Comments: Also involved in running training courses for audio staff.

Add **Update** **Delete**

Start	End	Location	Previous Role	Organisation
01-APR-2002	14-APR-2002	Belgium		

Help **Cancel** **< Back** **Next >** **Finish**

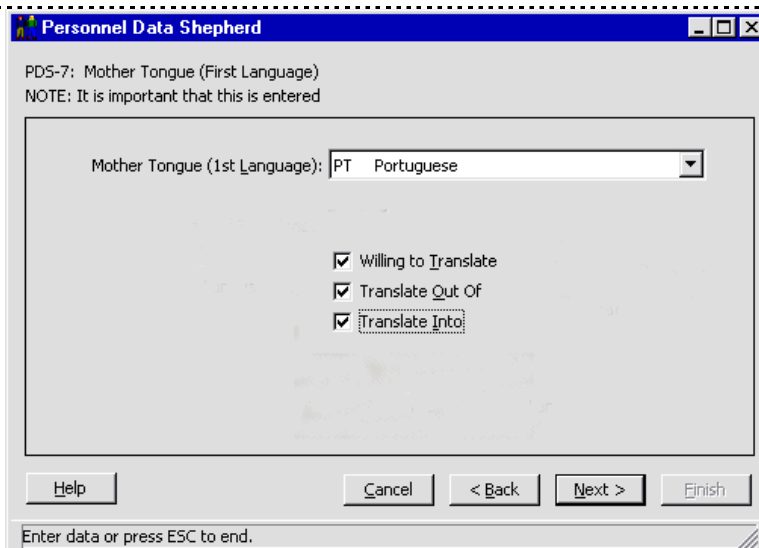
Comments on this experience, details

PDS-7 First Language

Select the **First Language** (Mother tongue) of the person.

If the person is willing to translate into or out of other languages (from/to their first language), check the boxes. This information needs to be read along with other language information to be entered in the following screen.

For additional information, see the PARTNER USER GUIDE, Person record, Additional Detail.



Personnel Data Shepherd

PDS-7: Mother Tongue (First Language)
 NOTE: It is important that this is entered

Mother Tongue (1st Language): PT Portuguese

☒ Willing to Translate
☒ Translate Out Of
☒ Translate Into

Help **Cancel** **< Back** **Next >** **Finish**

Enter data or press ESC to end.

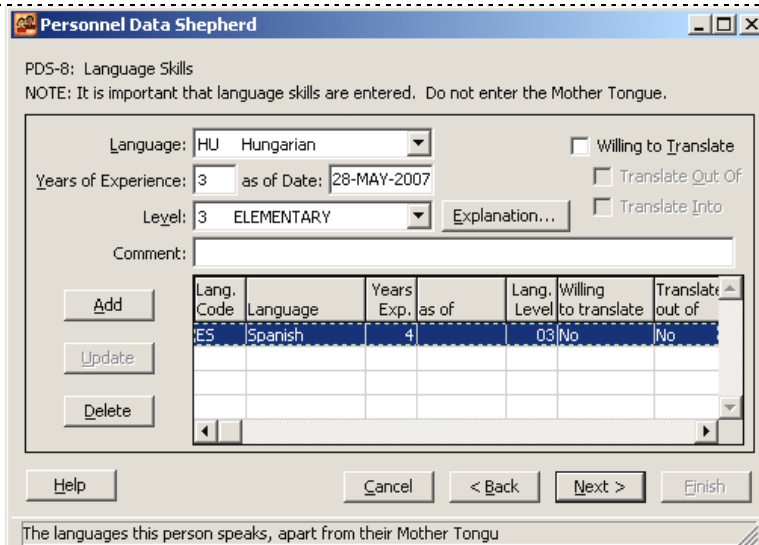
PDS-8 Language Skills

If the person can speak languages other than their first language, enter them here.

To add a new language, enter the data in the top part of the screen and click **Add**. The data is then transferred to the list in the lower part of the screen.

To amend an existing record, double click it in the lower part of the screen. The data is transferred to the upper part of the screen. Edit the data and click **Update**.

For additional information, see section 2.2.9, on page 22.



Personnel Data Shepherd

PDS-8: Language Skills
 NOTE: It is important that language skills are entered. Do not enter the Mother Tongue.

Language: HU Hungarian ☐ Willing to Translate
 Years of Experience: 3 as of Date: 28-MAY-2007 ☐ Translate Out Of
 Level: 3 ELEMENTARY ☐ Translate Into
 Comment:

Add **Update** **Delete**

Lang. Code	Language	Years Exp. as of	Lang. Level	Willing to translate	Translate out of
ES	Spanish	4	03	No	No

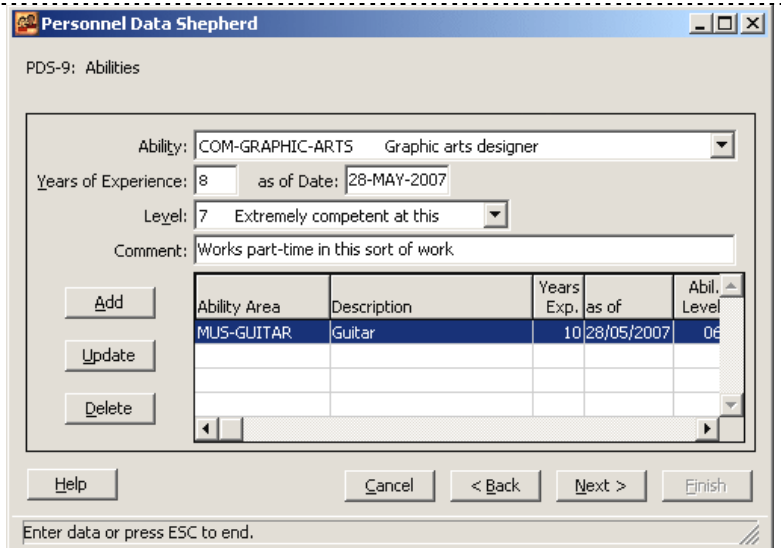
Help **Cancel** **< Back** **Next >** **Finish**

The languages this person speaks, apart from their Mother Tongue

PDS-9 Abilities

Enter abilities for the person. The technique is the same as for the previous screen (language skills).

For additional information, see 2.2.10, on page 23.



Personnel Data Shepherd
PDS-9: Abilities

Ability: COM-GRAPHIC-ARTS Graphic arts designer

Years of Experience: 8 as of Date: 28-MAY-2007

Level: 7 Extremely competent at this

Comment: Works part-time in this sort of work

Add
Update
Delete

Ability Area	Description	Years Exp.	as of	Abil. Level
MUS-GUITAR	Guitar	10	28/05/2007	06

Help Cancel < Back Next > Finish

Enter data or press ESC to end.

PDS-10 Driver Status

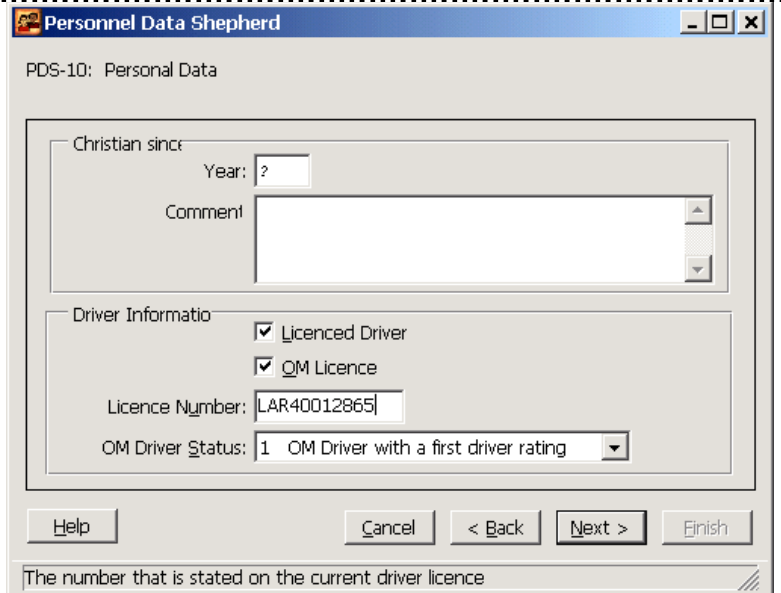
If desired, enter details of spiritual background, being aware that this information may be sensitive.

Enter details of the partner's ability to drive a car. Enter the number of the driving licence that they hold.

If they have taken an internal driving test for the organisation, note this.

Where appropriate, enter the internal driver status.

For additional information, see section 2.2.2, on page 16.



Personnel Data Shepherd
PDS-10: Personal Data

Christian since
Year: ?
Comment

Driver Information
☒ Licenced Driver
☒ OM Licence
 Licence Number: LAR40012865
 OM Driver Status: 1 OM Driver with a first driver rating

Help Cancel < Back Next > Finish

The number that is stated on the current driver licence

PDS-11 Summary

A summary is displayed of all data entered. If everything is correct, click **Finish**. This causes PETRA to save all the data you have entered.

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



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Chapter 3 Applications

This chapter explains how to enter applications from people who wish to join the Organisation for either a conference or short-term campaign, or a longer-term period of service.

Section	Item	Page No
3.1	Introduction to applications	37
3.2	Editing a short-term application (or entering one, the detailed method)	38
3.3	Entering a new short-term application using a Shepherd (basic information)	44
3.4	Entering or editing a long-term application	47
3.5	Browsing a list of all applications to a particular event.	49

Exporting applications is described in section 7.1, page 95.

3.1 Introduction to Applications

Each time a person applies to join any kind of program, campaign or conference the details of the application need to be entered. Data of these applications can also be changed and deleted or an application can be 'set on hold' or can be 'cancelled'. The following principles apply to Applications.

- **Short-term and Long-term Applications**

There are many types of programme that someone can join with OM, but these are classed as either Short-term or Long-term. Different information is required for the different situations, so different screens are used for short-term and long-term applications. Here are a few typical differences.

Short-term	Long-term
Normally the Sending Field can agree that a person can join.	The Receiving Field must agree that the person is suitable. This means that the home office must send a pre-selection form to the Field office.
Short-term campaign and conference are organised together	The service with the Field and the attendance at a Global Action conference are arranged separately.
The necessary funds are paid in one lump sum at the beginning.	Support is agreed on a monthly basis.

- **Applicants are Partners of Class Person!**

When someone applies to join the Organisation they must be entered as a partner (if they are not one already). Furthermore, they must have a partner record of class Person, as well as a record of class Family (see the PARTNER USER GUIDE). The Partner system records basic details such as address, and also important points such as language, gender (male/female), date of birth, etc. It is not possible to use the Personnel system to enter an application until the person has been entered as a partner.

- **Application Data and Personnel Data**

The Application menu (described in this Chapter) is used enter data about an application. However, it is also necessary to enter more 'permanent' data about an applicant. This is described in Chapter 2. Figure 2-1, page 14, summarises where all the different data items are entered.

- **Shepherds to Guide You**

PETRA now provides Shepherds that help you to enter the correct information without switching between lots of screens. Currently there are two application shepherds, the Short-term application

Shepherd (GC Application Shepherd, for Global Challenge), and the Conference Application Shepherd (to enter conference details for long-term applicants.)

3.2 Short-term Applications - Entering or Editing in Full

This section describes a full procedure for entering a short-term application. Although the Shepherds provide a simpler way of entering a new application for the first time, they cannot be used to make later changes, and so users need to be familiar with the 'full' process described here.

The procedure described here assumes that the partner has already been entered into PETRA as a partner of class Person and well as class Family.

1. From the menu bar of the *Personnel Welcome Screen*, select *Individuals* and find the person who is applying. The *Individual Data Screen* appears.

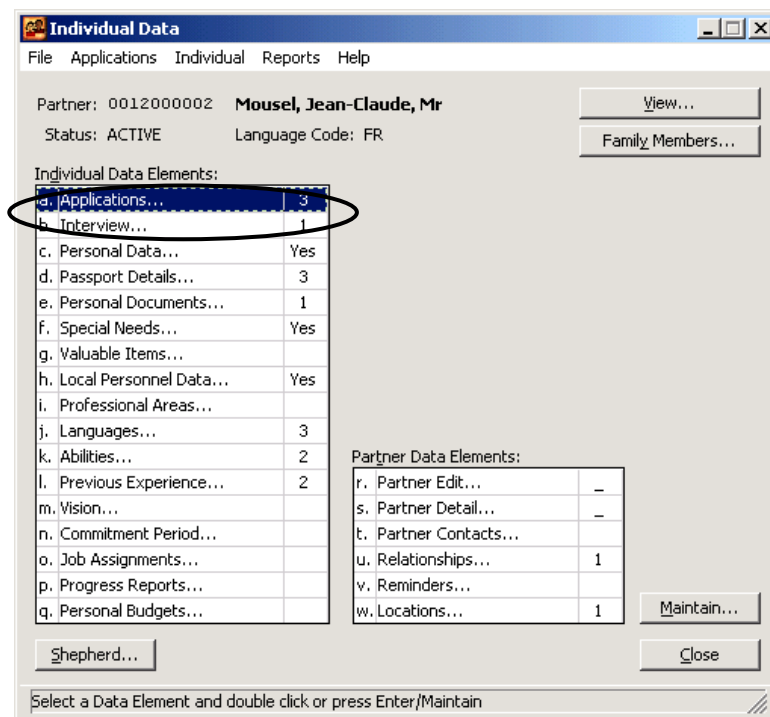


Figure 3-1 Individual Data Screen

2. Double click on Applications (or select Applications and click Maintain.) The *Application Browser* appears. This lists all existing applications for that person.

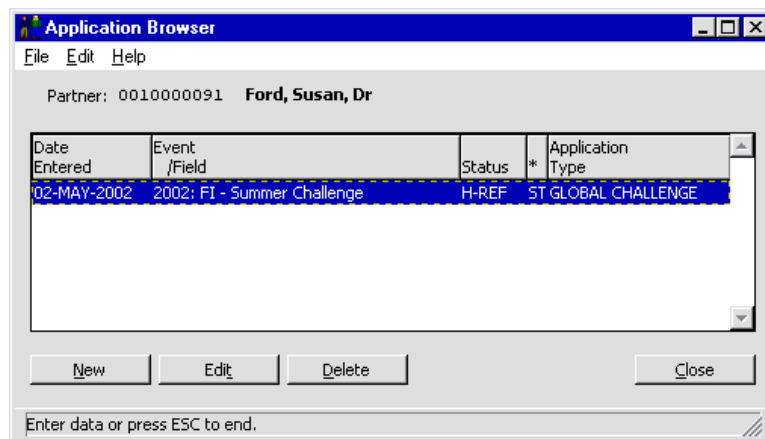
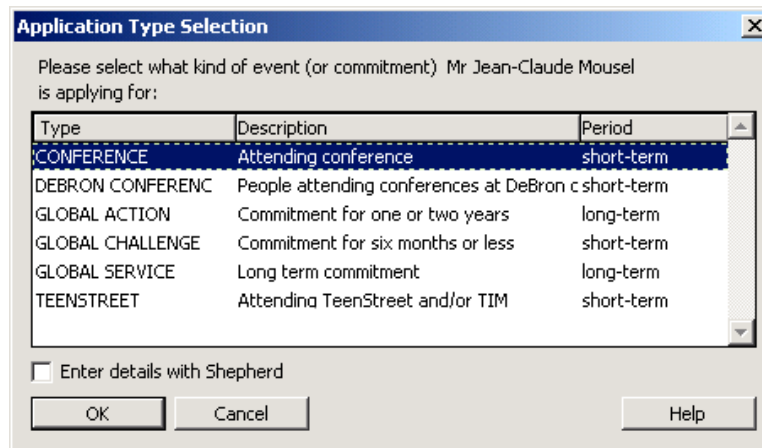


Figure 3-2 Application Browser, showing all existing applications for the person

- To edit an existing application, highlight the application and click Edit. This opens the *Application Browser* for this application. To enter a new application, there is an intermediate step. Click **New**. The *Application Type List* appears:

Figure 3-3 Application Type List



Application Type Selection

Please select what kind of event (or commitment) Mr Jean-Claude Mousel is applying for:

Type	Description	Period
CONFERENCE	Attending conference	short-term
DEBRON CONFERENC	People attending conferences at DeBron c	short-term
GLOBAL ACTION	Commitment for one or two years	long-term
GLOBAL CHALLENGE	Commitment for six months or less	short-term
GLOBAL SERVICE	Long term commitment	long-term
TEENSTREET	Attending TeenStreet and/or TIM	short-term

☐ Enter details with Shepherd

OK Cancel Help

- Select the type of application. The steps which will follow depend on the selection made at this stage. The options are as follows:

Global Challenge is the most common type of short-term application (Conference followed by Campaign). **TeenStreet** is identical for all practical purposes.

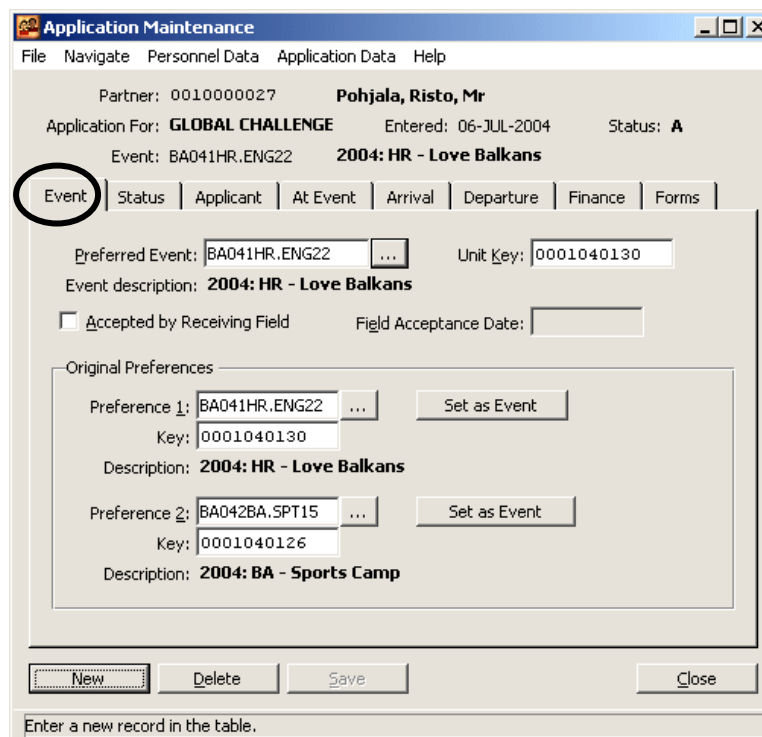
Conference is the same as Global Challenge, but simpler, since there is no campaign following the conference.

Global Action and **Global Service** are long-term applications (see section 3.4, page 47).

Note the check box to **Enter details with Shepherd**. This is only visible when Global Challenge or Conference are highlighted. In this section of the User Guide we are not considering use of Shepherds, so select Global Action, leave the Shepherd box unchecked, and click **OK**.

- The Application Maintenance Screen appears.

Figure 3-4 Application Maintenance - Event tab selected



Application Maintenance

File Navigate Personnel Data Application Data Help

Partner: 0010000027 **Pohjala, Risto, Mr**

Application For: **GLOBAL CHALLENGE** Entered: 06-JUL-2004 Status: **A**

Event: BA041HR.ENG22 **2004: HR - Love Balkans**

Event | Status | Applicant | At Event | Arrival | Departure | Finance | Forms

Preferred Event: BA041HR.ENG22 ... Unit Key: 0001040130

Event description: **2004: HR - Love Balkans**

☐ Accepted by Receiving Field Field Acceptance Date:

Original Preferences

Preference 1: BA041HR.ENG22 ... Set as Event

Key: 0001040130

Description: **2004: HR - Love Balkans**

Preference 2: BA042BA.SPT15 ... Set as Event

Key: 0001040126


Description: **2004: BA - Sports Camp**

New Delete Save Close

Enter a new record in the table.

This screen allows you to enter or edit all data relating to short-term applications. It can be seen that there are 6 tabs, and each shows different data. In Figure 3-4, the Event tab has been selected. Each of them will be described in turn.

6. **Event Tab** This is shown in the previous figure. Enter data as follows:

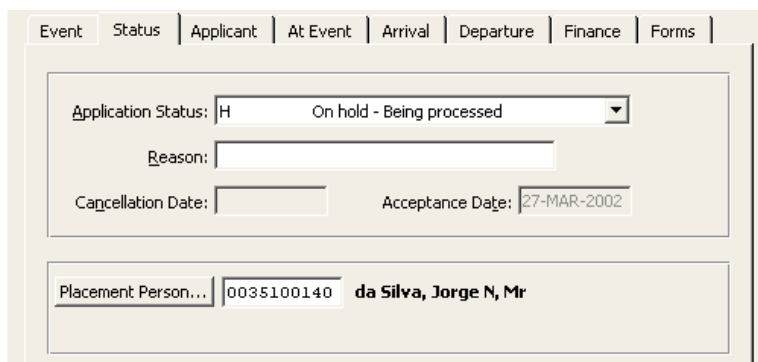
Preferred Event The preferred event is the event which is currently expected that the applicant will participate in. Click on the find button . On the Find screen, select the required event and click Accept. This is the applicant's first choice. See below for additional choices

Accepted by Receiving Field This check box allows you to record that the Receiving Field has agreed to this application, but this is not always used for short-term events. If used, then enter the date to record when acceptance was notified.

Original Preferences These fields let you record the candidate's original first and second choices of event. The first choice may be entered either in the Preferred Event field (above) or the first choice. In either case it is copied to the other, if the other field is blank. A second choice can also be entered. In rare occasions when it is not possible for an applicant to participate in either first or second choice events, the Preferred event box must be changed to the finally agreed destination.

7. **Status Tab** This is shown in Figure 3-5. Enter data as described.

Figure 3-5 Status tab on Application Maintenance Screen

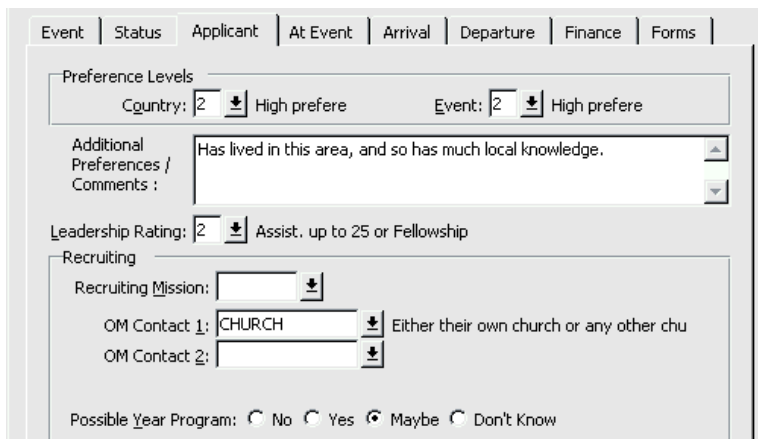


Application Status Use the drop-down box to select the status. Options include 'on hold' and 'cancelled'. If appropriate a brief comment can be put in the **Reason** box. In the case of Accepted or Cancelled, enter the **Date**.

Placement Person If required, it is possible to select a placement person. This is the person in the Sending Field who is dealing with this application. The placement person is able to browse those applications which have been assigned to him/her (see section 3.5, page 49).

8. **Applicant Tab** This is shown in Figure 3-6. Enter data as shown.

Figure 3-6 Applicant tab on Application Maintenance Screen



Country and Event Preference Levels These boxes can be used to indicate if the applicant has a particularly strong desire to join an event in this particular country or of this particular event.

Additional preferences/Comments Enter any comments that may be useful to the event organisers.

Leadership Rating Using the drop-down box record any information on ability to lead a team.

Recruiting Mission If the applicant was recruited through another mission, select the name.

OM Contacts These boxes allow you to record how the person heard about the organisation.

9. **At Event tab.** This is shown in Figure 3-7. Enter data as described, relating to **Event Roles**, etc.

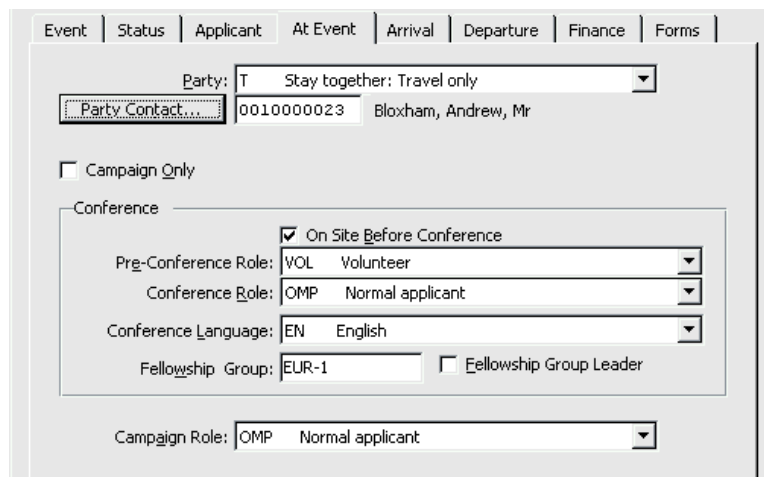


Figure 3-7 'At Event' tab on Application Maintenance Screen

Party If the person is coming as part of a group that may want to stay together, select the appropriate option. Click the **Party Contact** button to select the group's co-ordinator.

Campaign Only Check the box if the person is only participating in the campaign, and not the conference. (If you do this, the conference details are hidden.)

On Site Before Conference If the person is arriving early, click this box. In the **Pre-conference Role** box, select the role that they will have at this time.

Conference Role Select the main role that the person will have at the conference.

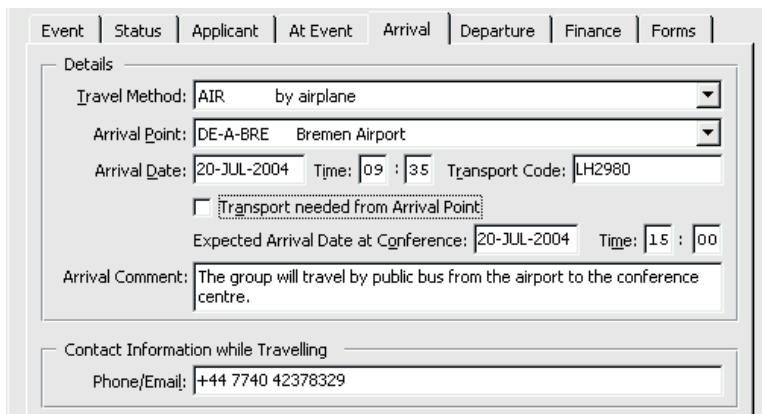
Conference Language Select the language that the person will use at the conference (this is relevant in cases where interpretation is provided.)

Fellowship Group Enter the fellowship group to which this person has been assigned. If they will lead a fellowship group, click the **Fellowship Group Leader** check box.

Campaign Role Use this box to indicate if the person will have any special role during the campaign.

10. **Arrival and Departure tabs** These two are similar. The **Arrival** Tab is shown in Figure 3-8, and **Departure** tab allows similar information to be recorded for departure.

Figure 3-8 Travel details tab on Application Maintenance Screen



Enter appropriate data for outward and return journeys.

Travel Method Select the method of travel (air, bus, train, etc.)

Arrival/Departure Point Select the arrival point from the drop-down list. These codes have a standard format. If the required arrival point is not shown, it can be added to the appropriate Table of entries (section 6.2.4, page 84); however, the appropriate office should be consulted to ensure that any new code is appropriate for local use, and will not cause confusion.

Date and Time Enter the date and time of arrival at the main arrival point (airport, train station, etc). If the person is travelling by air, this should be the arrival/departure time of the flight.

Note If the Travel method and Arrival Point are unknown, the date must also be cleared.

Transport Code Enter the flight number (or train, bus number, etc.)

Transport needed from arrival point Check this box if local transport needs to be arranged by the event organisers from the arrival point to the conference/campaign.

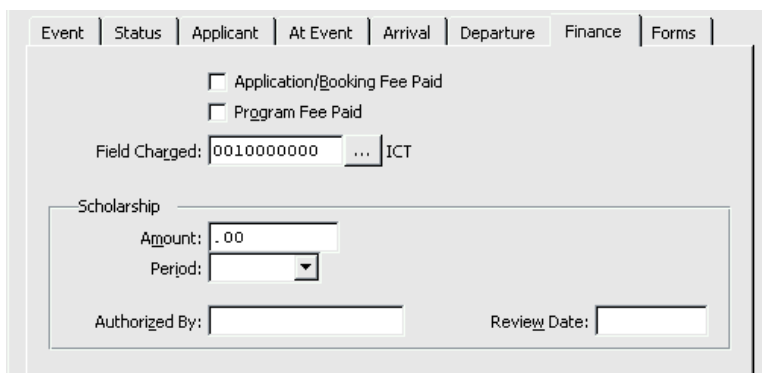
Expected Date of Arrival at Conference (and Time) Enter these times (unless you have asked the organisers to arrange this).

Arrival Comment This field can be used for additional information.

Contact Information while Travelling If appropriate enter a mobile phone number or email address to contact the person after they have started their journey. This applies to both Arrival and Departure, but the field is only shown for the **Arrival** tab.

11. **Finance Tab** This is shown in Figure 3-9. Enter data as described below

Figure 3-9 Finance tab on Application Maintenance Screen



Application/Booking Fee Paid Use the check box to record if the initial booking fee has been paid.

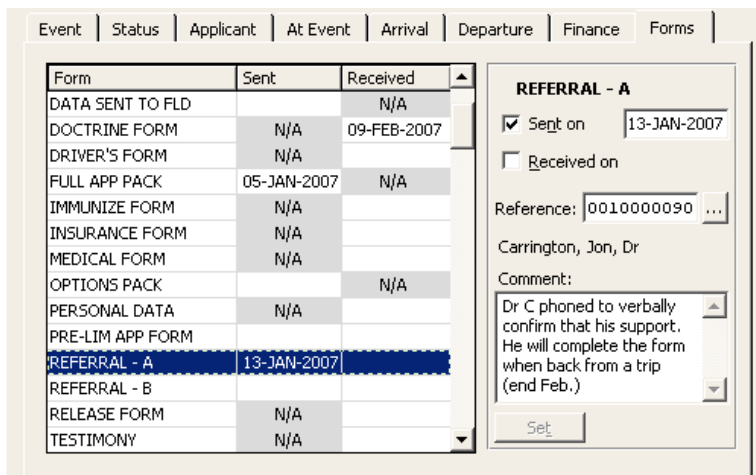
Program Fee Paid Use the check box to show if the full fee has been paid.

Field Charged Select the Field who will be charged by the conference/campaign organisers for this person's participation in the conference/campaign.

Scholarship (This applies more often to long-term applications.) If a subsidy is being provided, enter the **amount** and **period** (eg 100 \$ per month), the person who **authorised** this and the date it is to be **reviewed**.

12. **Forms Tab** This is shown in Figure 3-10. Enter data as described below.

Figure 3-10 Forms tab on Application Maintenance Screen



Form	Sent	Received
DATA SENT TO FLD		N/A
DOCTRINE FORM	N/A	09-FEB-2007
DRIVER'S FORM	N/A	
FULL APP PACK	05-JAN-2007	N/A
IMMUNIZE FORM	N/A	
INSURANCE FORM	N/A	
MEDICAL FORM	N/A	
OPTIONS PACK		N/A
PERSONAL DATA	N/A	
PRE-LIM APP FORM		
REFERRAL - A	13-JAN-2007	
REFERRAL - B		
RELEASE FORM	N/A	
TESTIMONY	N/A	

REFERRAL - A
☒ Sent on 13-JAN-2007
☐ Received on
 Reference: 0010000090 ...
 Carrington, Jon, Dr
 Comment:
 Dr C phoned to verbally confirm that his support. He will complete the form when back from a trip (end Feb.)
 Set

This screen allows you to keep a record of which forms have been sent or received. The panel on the right refers to the line that is highlighted on the left. In the example shown in Figure 3-10, a referral form was sent to the first reference person on 13 Jan 2007. On the right hand side it is possible to enter the date sent, a comment. If the person concerned with a form is a partner (for example in the case of the reference forms) then a partner key can be entered.

Highlight the appropriate Application Form as shown. Check the appropriate box, enter the date, and click **Set**. If you wish to remove an entry, highlight it, clear the box and the date and click **Set**. Similarly select a partner for a reference person (Referral A or B) and enter a comment and click **Set** then **Save**.

13. **Local Application Data** If required, enter local application data for this application. This is not currently a separate Tab. From the menu bar, select **Application Data**, then **Local Application Data**. Enter data as required, and click **Save** then **Close**.

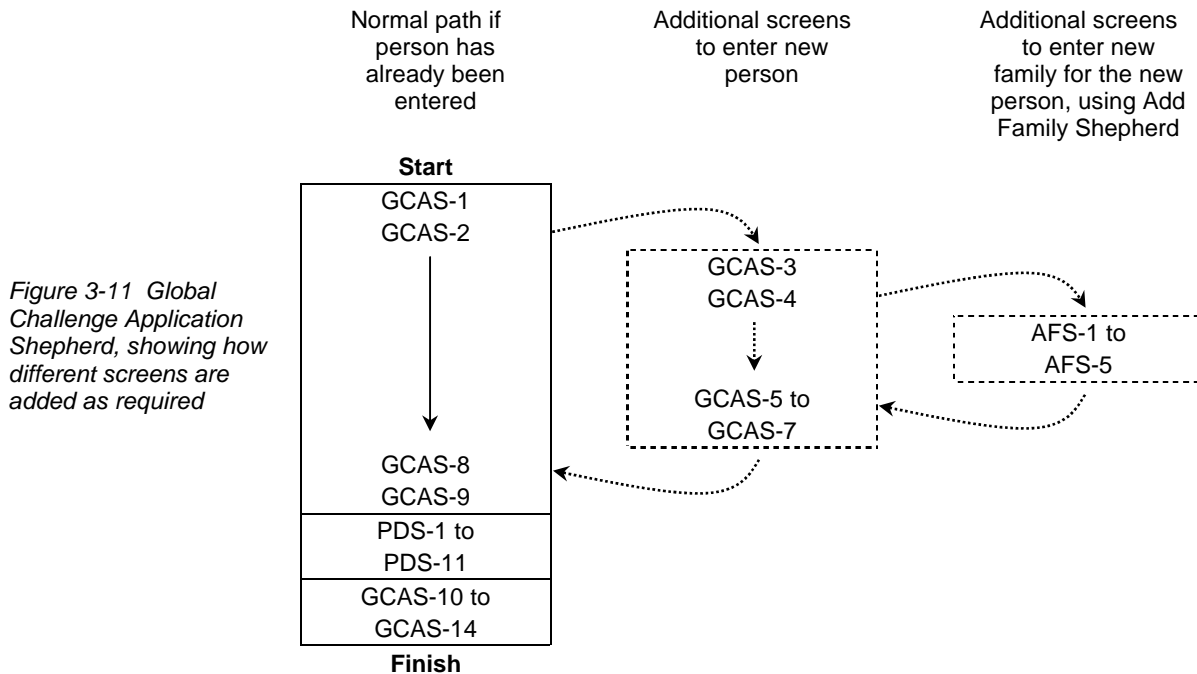
14. Click **Save** then **Close**.

3.3 Short-term Applications (Shepherds)

Shepherds lead you step-by-step through the process of entering a new application, so making it easy to check that no important data has been omitted. However, for editing or reviewing an existing application the 'full' process described in section 3.2, page 38, must be used. The Global Challenge Application Shepherd (GCAS) is for short-term events which include a conference followed by a campaign. The Conference Shepherd is for applications only to attend a conference. It is similar to the GCAS, but slightly shorter, since it omits data which is only relevant to campaigns. The description which follows here concentrates on the GCAS Shepherd, since this is longer.

If the person is completely new, then GCAS first runs the Add Person and Add Family Shepherds as an additional preliminary stage, allowing everything to be entered as a single operation. This is not a problem, but some users may wonder why the screen names keep changing. Normally the GCAS Shepherd will just present the minimum necessary number of screens, and will include some screens from the Personnel Data Shepherd (PDS). This is the left-hand column in Figure 3-11, page 44. If you

are using the application Shepherd to enter a new person, then some additional screens will be included (similar to the Add Person Shepherd in the Partner System.) Finally, if you are adding a new person, and there is no existing Family record, then you will also see the Add Family Shepherd screens.



3.3.1 Starting the Short-term Application Shepherd

There are several menus that give access to the GCA Shepherd, but the two recommended ones are listed below, the choice depending on whether or not you think that the applicant has already been entered into your PETRA system as a person.

Applicant not yet entered on PETRA

If you believe that the person has probably not yet been entered into your PETRA system, then it is convenient to enter the person and the application in a single operation. From the *Partner Welcome Screen*, select *Individuals -> Enter New Application*.

Figure 3-12 *Personnel Welcome Screen*, showing menu for entering application for new partner

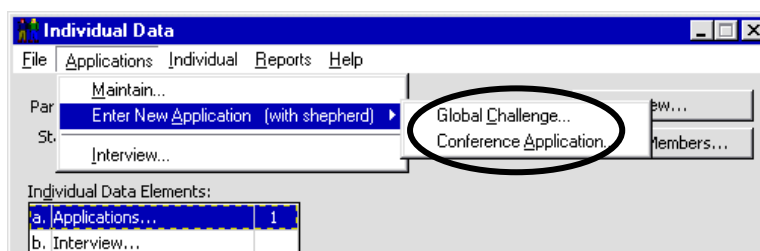


Applicant already entered as a person

Although you can use the previous procedure even if the person has already been entered into PETRA, in this case it is best to first go to the *Individual Data Screen* for that person. This allows you to check all previous and existing application data before starting to enter the new application. From the

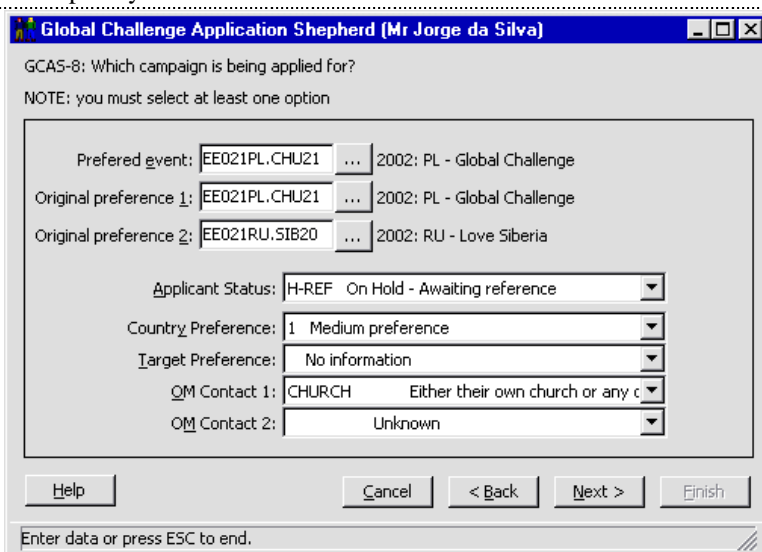
Personnel Screen, select Individuals and then find the partner. When the *Individual Data Screen* opens, select Applications->Enter New Application, as shown in Figure 3-13.

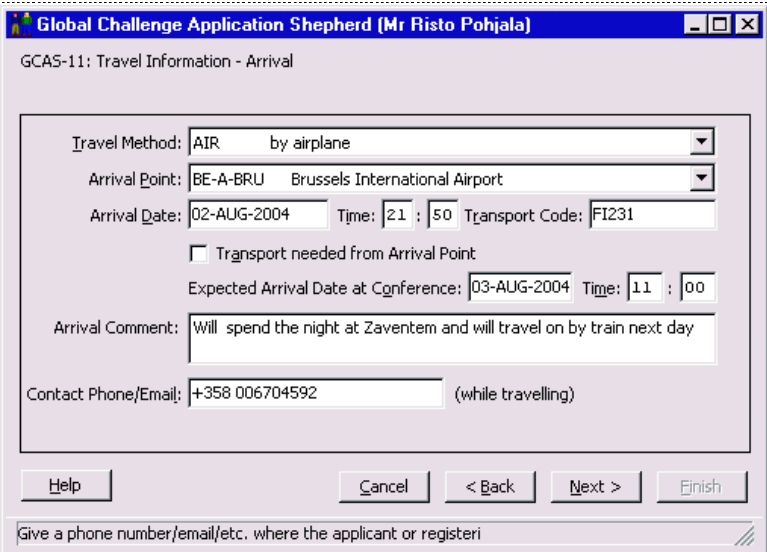
Figure 3-13 Individual Data Screen menu for entering a new application for an existing person



3.3.2 Using the Short-term Application Shepherd

The following table provides notes on the various Shepherd screens. Simple screen shots have omitted, but the more complex ones are included. For further advice on individual terms, see the fuller descriptions given in section 3.2, page 38.

Screen	Data to enter	Notes
GCAS-1	Select Site	Normally just click Next. A small number of offices manage more than one site, and this screen allows them to click the correct one.
GCAS-2	Title (eg Mr) and name	First name means personal name (in some languages it is not necessarily placed first!)
GCAS-3 to GCAS-6	Basic data for Person record and Family record	See PARTNER USER GUIDE, Add Partner Shepherds section
GCAS-7	Additional Address	Since many applicants are students with both a university and a home address, this screen allows you to enter an additional address. When the screen opens, click Find Address to find an address that has already been entered into PETRA, or New Address to enter a completely new address.
GCAS-8	Preferred Event	 <p>Click the button to select the Preferred Event. If the applicant has entered two choices, add these as the Original Preferences. Applicant Status - select from drop-down box Country and Target Preferences - only enter these if the applicant has expressed a particular interest in the country or type of ministry. OM Contacts - record how the applicant heard of the Organisation.</p>

Screen	Data to enter	Notes
GAS-9	Conference and Campaign Details	<p>Select the various Roles to show what the applicant's main function will be before the conference (if they are coming early), at the conference or during the campaign.</p> <p>Enter the Fellowship Group, if it has been decided, and indicate if the person will be leading a Fellowship Group.</p> <p>Record the Leadership Rating, if you have any information on this.</p> <p>Field to Charge - Select the Field who the conference organiser should charge for this person's participation.</p>
PDS-1 to PDS-11	<i>Personal Data Shepherd Information</i>	<i>These screens are explained in detail in section 2.3, page 31.</i>
GAS-10	Year Program	If appropriate, record the person's interest in a Year Program.
GAS-11	Travel (Arrival)	 <p>Select the Travel Method (car, bus, air, etc.)</p> <p>Select the major Arrival Point (eg airport or main railway station)</p> <p>Enter the Date and Time of arrival of the flight or train. If a flight, enter the flight number in Transport Code.</p> <p>If you want local travel from the airport/station to be arranged by the organiser, click the button to say so. If not, then enter the Expected Arrival Date and Time at the Conference.</p> <p>Under Arrival Comments, enter any special notes.</p> <p>Contact Phone/Email Enter, for example, a mobile phone number that can be used after the person has started their journey.</p>
GAS-12	Travel (Departure)	Enter similar details to Arrival
GAS-13	Comments/ Preferences	Enter any further comments which may be relevant to the Conference and Campaign organisers.
GAS-14	Summary	Check the summary details. If all is OK, click Finish .

3.4 Long-term Applications - Editing and Entering

When entering a long-term application, the following steps are necessary:

- The Applicant must be entered as a Person on the Partner System.
- The details of the application must be recorded (the subject of this section.)
- Additional Personnel Individual Data should be added as required (see Chapter 2.) This may include going back to the Partner System to enter additional detail (eg entering the emergency contact as a relationship.)

To enter application details for an existing partner:

1. Bring up the *Individual Data Screen* for the Partner, click **Applications**, select the type of Application (Global Action or Global Service) and click **OK**. This process is identical to that for the short-term application (see section 3.2, page 38, steps 1 to 4). The *Application Maintenance Screen* for long-term applications appears.

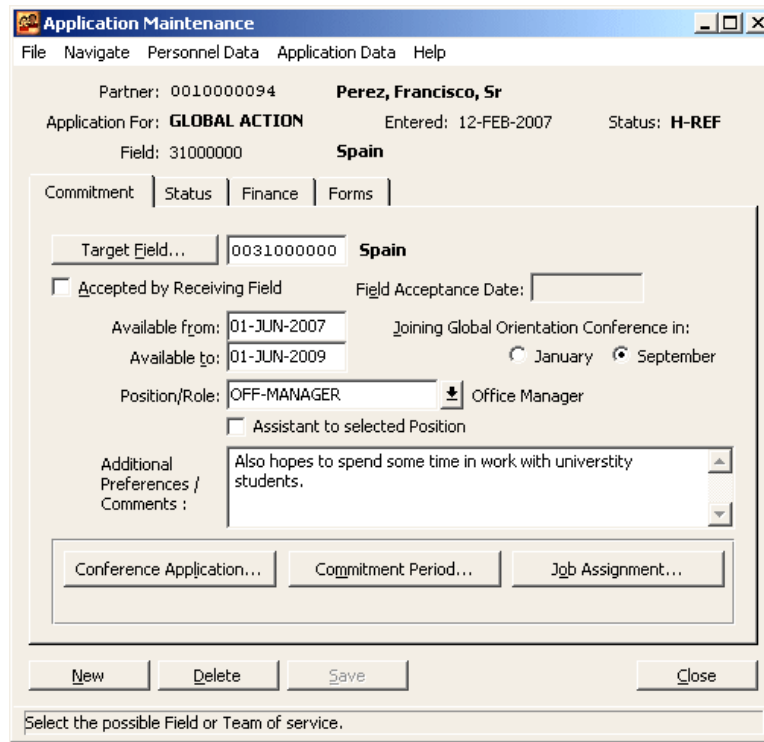


Figure 3-14 Application Maintenance Screen for Long-term applications, showing Status tab

This screen has four tabs. Enter data as follows.

2. **Commitment Tab** This is shown in Figure 3-14. Enter data as follows:

Target Field Click the button. On the Find screen, select the required Field and click **Accept**.

Accepted by Receiving Field This check box allows you to record that the Receiving Field has agreed to this application. If this is the case, enter the date when acceptance was notified.

Available from/to Enter the dates for which the applicant is available. These fields do not signify an actual commitment (that is entered below.)

Joining Conference Select the date that the partner will be joining a conference.

Position/Role If this is an application for a specific job/role, select it using the drop-down box. The Check box allows you to indicate that the application is to be an assistant to the position shown, rather than the main holder of that position.

Additional Preferences / Comments Add any comments relevant to this application.

The following three buttons are only enabled after the application has been saved.

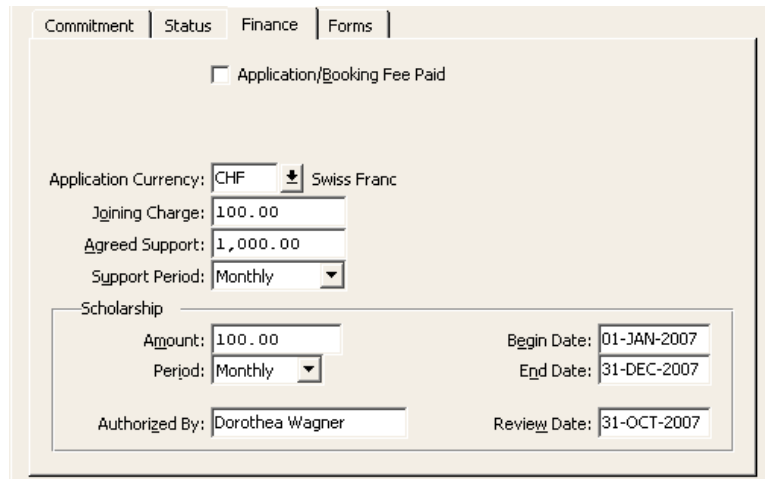
Conference Application If it is certain that the applicant can attend a particular new entrant's conference, click this button. This actually starts the screen to enter a new short-term application, just for the conference.

Commitment Period Click on this button to enter a commitment record for the partner. Obviously this should not normally be done until the Receiving Field has accepted the application. Enter the commitment as described in section 2.2.13, page 26.)

Job Assignment Use this button to assign the applicant to a job. (See section 2.2.14, page 27, for a more complete description of Job Assignments. Job assignments should normally only be done for an applicant after they have been accepted by the Receiving Field.

3. **Status Tab** This shows whether the application has been accepted by the Sending Field, and is identical to the short-term application. See the short-term **Status Tab** description on page 40.
4. **Finance Tab** This shows whether the basic joining fee has been paid, and the agreed level of support required.

Figure 3-15 Finance tab on Long-term Application Maintenance Screen



Application Fee Paid Check this box if you wish to record that the application fee has been received.

Application Currency Select the appropriate currency for this application.

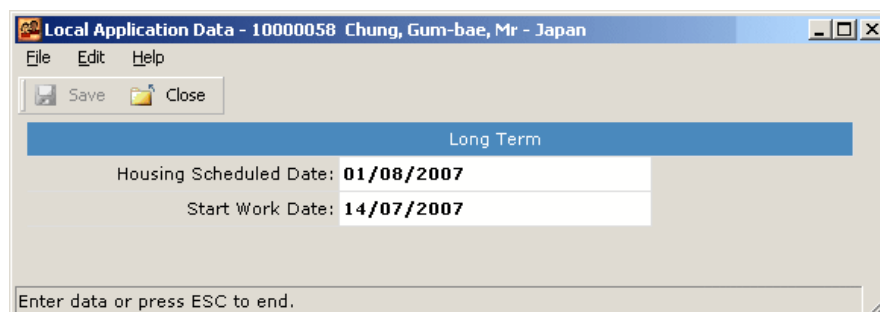
Joining Charge Enter the amount of the charge to join the program.

Agreed Support and Support Period Enter the appropriate figures, eg \$ 1,100 per month.

Scholarship If the person's application is to be subsidised, enter the **Begin** and **End** dates, the **Amount** and **Period**, the authorising person and the date that this is to be **Reviewed**.

5. **Forms Tab** This allows you to keep a record of which forms have been sent and received back in connection with this application. It is similar to the short-term application, so for further details see the short-term **Forms Tab** description on page 43.
6. **Local Application Data** If your office has set up local application data fields, these should be entered now. With the current version of PETRA, this does not appear as a tab, but from the menu bar item Application Data, then Local Application Data.

Figure 3-16 Local Application Data Screen, showing the two items that this office has set up in the category Long-Term



Enter the data as required. In the example, the office has set up one Category (Long Term) and two items in this category. Then click **Save** and then **Close** below the menu bar.

7. If appropriate, now enter additional personnel data using the menu items on the **Personnel Data** item on the menu bar (or the *Individual Data Screen* can be used). When all

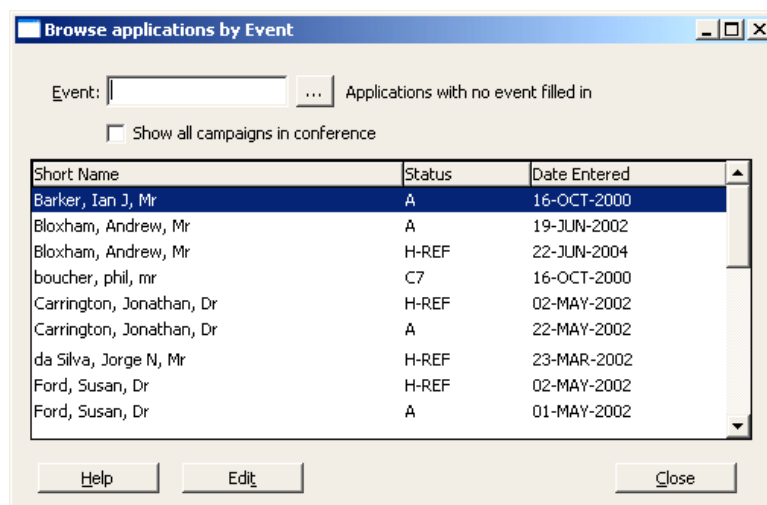
information is entered, click **Save**, then **Close**. If required now enter additional information from the Partner Edit Screen, such as Partner Details.

3.5 Browsing a List of Applications

PETRA allows a user in a Sending Field to browse all short-term or long-term applications entered on the system. This is done from the File menu on the Personnel welcome screen (Figure 1-3, page 10.)

3.5.1 Short-term Applications for an Event

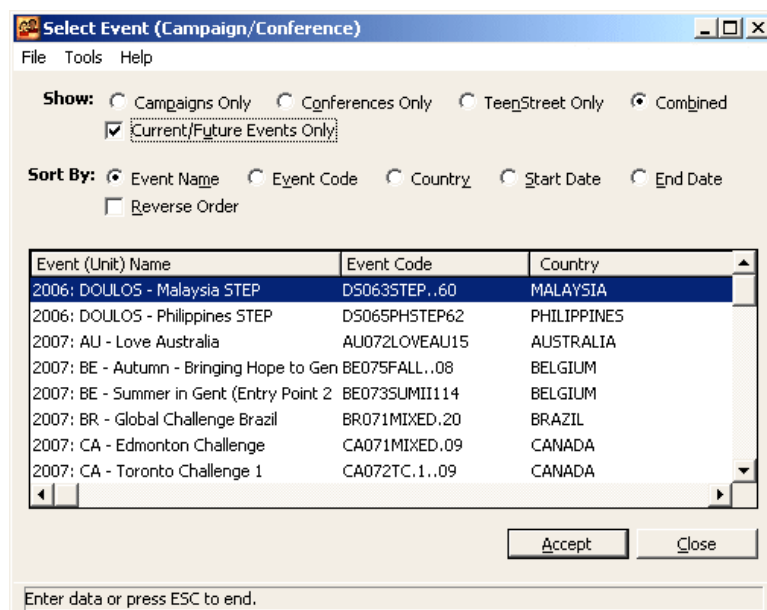
1. To browse short-term applications, from the *Personnel Screen* select **File**, then **Browse short-term applications by event**. The *Browse Applications by Event Screen* appears.



Short Name	Status	Date Entered
Barker, Ian J, Mr	A	16-OCT-2000
Bloxham, Andrew, Mr	A	19-JUN-2002
Bloxham, Andrew, Mr	H-REF	22-JUN-2004
boucher, phil, mr	C7	16-OCT-2000
Carrington, Jonathan, Dr	H-REF	02-MAY-2002
Carrington, Jonathan, Dr	A	22-MAY-2002
da Silva, Jorge N, Mr	H-REF	23-MAR-2002
Ford, Susan, Dr	H-REF	02-MAY-2002
Ford, Susan, Dr	A	01-MAY-2002

Figure 3-17 Browse application by event screen (short-term)

2. Initially the screen shows all short-term applications. To search for, and then select, the Event that you are interested in, click **...** to show the *Select Event Screen*.



Event (Unit) Name	Event Code	Country
2006: DOULOS - Malaysia STEP	DS063STEP..60	MALAYSIA
2006: DOULOS - Philippines STEP	DS065PHSTEP62	PHILIPPINES
2007: AU - Love Australia	AU072LOVEAU15	AUSTRALIA
2007: BE - Autumn - Bringing Hope to Gen	BE075FALL..08	BELGIUM
2007: BE - Summer in Gent (Entry Point 2	BE073SUMIII14	BELGIUM
2007: BR - Global Challenge Brazil	BR071MIXED.20	BRAZIL
2007: CA - Edmonton Challenge	CA071MIXED.09	CANADA
2007: CA - Toronto Challenge 1	CA072TC.1..09	CANADA

Figure 3-18 Select Event Screen, showing options

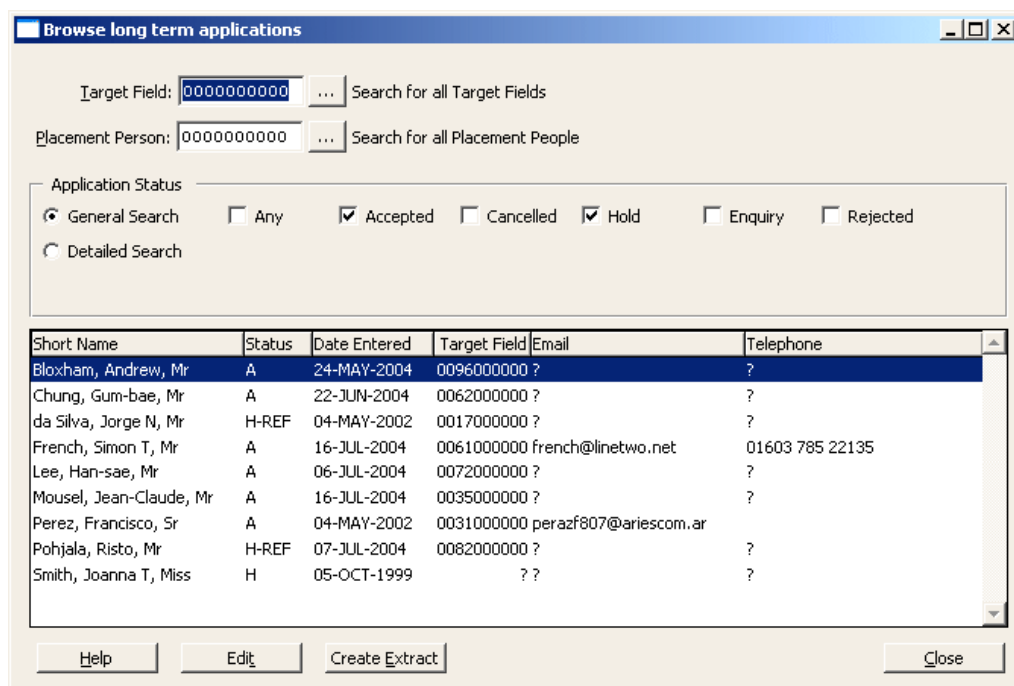
3. Scroll to the required event, and click **Accept**. To help you find the correct event, you can choose to **Show** just campaigns, conferences, etc or all in a Combined list. You can also choose

just to show **Current/Future** events (normally this box should be checked. You can also choose the order that the list of events should be **Sorted by**.

3.5.2 Long-term Applications

1. To browse long-term applications, from the *Personnel Screen* select *File*, then *Browse* long-term applications. The *Browse Applications by Event Screen* appears.

Figure 3-19 Browse application by event screen (short-term)



Short Name	Status	Date Entered	Target Field	Email	Telephone
Bloxham, Andrew, Mr	A	24-MAY-2004	0096000000 ?		?
Chung, Gum-bae, Mr	A	22-JUN-2004	0062000000 ?		?
da Silva, Jorge N, Mr	H-REF	04-MAY-2002	0017000000 ?		?
French, Simon T, Mr	A	16-JUL-2004	0061000000	french@linetwo.net	01603 785 22135
Lee, Han-sae, Mr	A	06-JUL-2004	0072000000 ?		?
Mousel, Jean-Claude, Mr	A	16-JUL-2004	0035000000 ?		?
Perez, Francisco, Sr	A	04-MAY-2002	0031000000	perazf807@ariescom.ar	
Pohjala, Risto, Mr	H-REF	07-JUL-2004	0082000000 ?		?
Smith, Joanna T, Miss	H	05-OCT-1999	??		?

2. The screen lists those long-term applications which are consistent with the criteria selected at the top of the screen.

Target Field or Placement Person If you wish to search just for applications to one Field, or applications being handled by one Placement Person, click [...] as appropriate. This brings up a Find screen to select the required Field or Placement Person.

Application Status The General Search allows you to select just applications with a specific status, such as “On Hold”. To see all applications (for the selected Target Field or Placement Person) select **All**. If you required a more detailed search for a specific status (such as “on Hold – awaiting reference” then select **Detailed Search**. A new button then appears – **Select Detailed Statuses ...**. Click this and then select the status(es) for which you wish to display applications.

3. When you have found the application you require you can select it and click **Edit**. Alternatively you can use the **Create Extract** button if you wish to create an extract of all applications displayed.

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

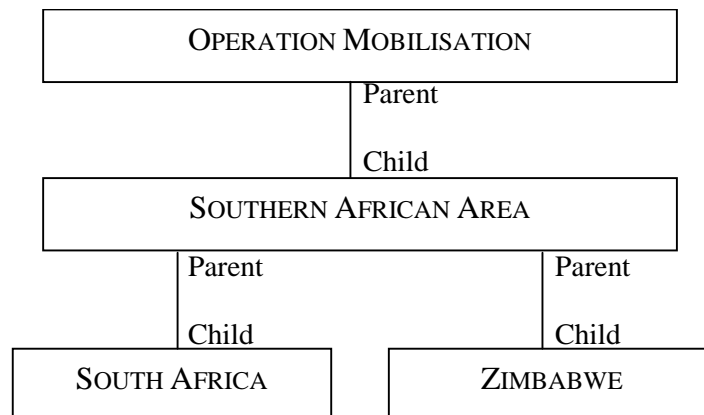
Chapter 4 Units

4.1 Introduction to Units

A Unit is the general term used in PETRA to refer to a team or Field (an area where members of the Organisation work). Most units are 'teams' and as such as fairly permanent. However, conferences and campaigns are also entered as units. This chapter is mainly concerned with units of the permanent type (either Sending Field or Receiving Field). Campaign and Conference Units are described in Chapter 7, Event (Conference/Campaign) Maintenance. Units must be entered as partners in PETRA before you can add any detail. Most permanent units will be entered when PETRA is installed. Temporary units, such as campaigns, will often be added by means of a central update of units, which can be imported, as described in the PARTNER USER GUIDE.

Unit Hierarchy In the Organisation, all units fit into a hierarchy, that is they report to a larger unit (known as their Parent Unit), and they may have smaller units reporting to them (known as their Child Units). This is illustrated in Figure 4-1

Figure 4-1 Example of Hierarchy Structure



Jobs For each **Unit** it is possible to define **Jobs**, such as team leader, accountant, or student worker. These job positions can exist, even if at present there is no-one to do them. Each job can be described further by adding additional descriptive labels. There are four types of label that can be associated with each job - Job **Abilities**, Job **Visions**, Job **Qualifications** and Job **Languages**.

The Units themselves can also have abilities, visions and languages associated with them. Obviously these will often reflect the similar attributes of the individual jobs within that unit.

The main features of units are as follows:

- **The Set of Units** The total set of units that exist on PETRA can be changed by creating new units and deleting existing units. See section 4.2, Creating new Units, page 54, and to find how these actions are performed.
- **Unit Hierarchy** The relationship of one unit to another is defined using Hierarchy. See section 4.4, page 55, for further details.
- **Unit Jobs** The job positions within each unit can be fully defined. Unit jobs are described in section 4.5, page 57. For each job position the job requirements can be defined as Job Ability, Job Language, Job Qualification and Job Vision. See sections 4.5.2 to 4.5.5, pages 59n, for further details.
- **Unit Abilities** A list of the total set of abilities desired within a unit can be maintained, as described in section 4.7, page 63. This list shall normally contain all the Job Abilities defined in

section 4.5.2, Job Ability, but may contain additional abilities not specified in any of the Unit Jobs.

- **Language** A list of the total set of language skills desired within a unit can be maintained, as described in section 4.7.2, Unit Language, page 65. This list normally contains all the Job Languages defined in section 4.5.3, Job Language, page 60 but may contain additional languages not specified in any of the Unit Jobs.
- **Vision** Vision is used to describe the intended direction or ministry of either an individual or a unit. It is possible for a number of different visions to co-exist and complement each other. A list of the total set of visions desired within a unit can be maintained, as described in section 4.7.3, Unit Vision, page 66. This list shall normally contain all the Job Visions defined in section 4.5.5, Job Vision, but may contain additional visions not specified in any of the Unit Jobs.
- **Costs** The cost associated with running a unit can be recorded as described in section 4.8, Unit Costs, page 66.
- **Evaluations** Regular evaluations of a unit's progress can be recorded as described in section 4.9, Unit Evaluations, page 67.

4.2 Creating new Units

When PETRA is installed, the main Fields of the Organisation are installed as Units. Any new Organisation Fields will normally be imported into PETRA (see PARTNER USER GUIDE for full details) but sometimes it may be necessary to create a new Unit. Also, short-term Campaigns are a special kind of unit and the creation of these is described in section 7.2, page 95.

Note It is recommended that new Units relating to the local office and regional office are created by the System Administrator. This procedure is fully described in the SYSTEM MANAGER USER GUIDE.

A new unit can be created from the Partner module (see the PARTNER USER GUIDE) or it can be created starting at the Personnel Screen as follows:

1. From the main *Personnel Screen* select *Units*. The *Partner Find Screen* appears.

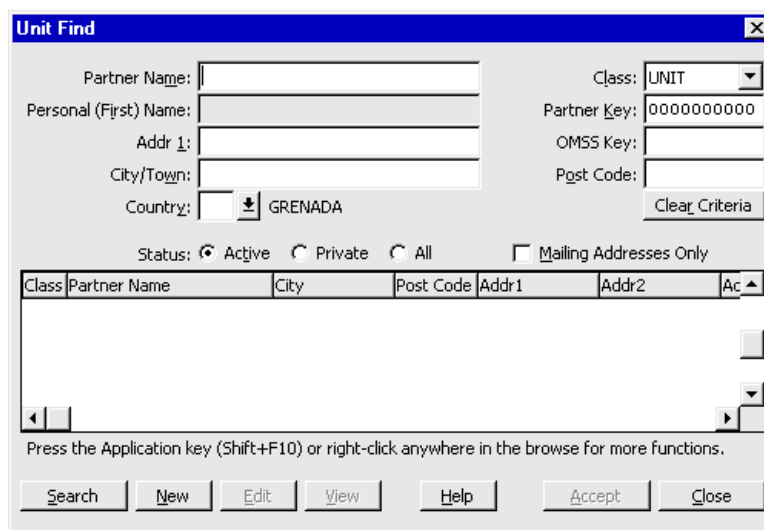


Figure 4-2 Partner Find Screen

2. Use the instructions found in the PARTNER USER GUIDE to add a new unit from the *Partner Find Screen*.
3. When you click on the **New** button to create a new unit, you will be asked if you wish to assign a 'parent' unit, to which the new unit belongs. Normally you should say 'Yes', and do this

immediately. However, you can select 'No' and do it later. The relationship between units is explained in section 4.4 Unit Hierarchy.

- Once the unit has been created, specific properties can be added to the new unit by following the instructions in sections 4.4 to 4.9 below.

4.3 Editing Units - the Unit Maintenance Screen

To view or add data to a unit, or to modify existing data in a unit, use the *Unit Maintenance Screen*.

- On the main *Personnel Screen* select **Units** and then **Unit**. A *Partner Find Screen* appears.
- Find the appropriate unit and click **Accept**. The *Unit Maintenance Screen* appears, showing the unit you have selected (Figure 4-3). This is the starting point for entering most Unit maintenance data.



Figure 4-3 Unit Maintenance Screen, showing Unit Maintenance menu

- The **Unit Maintenance** menu at the top of the *Unit Maintenance Screen* allows you to edit a number of items, as shown in Figure 4-3. These items are described in the following sections of this chapter.
- The **File** menu provides a simple way of jumping to the partner unit or a child unit.
- The **View** button provides a quick overview of the jobs, languages and costs that have been entered and also shows the parent of the unit.

Deleting a Unit

An existing unit cannot be deleted, but it can be marked with partner status **Inactive**, to avoid it showing up in lists of units. See the **PARTNER USER GUIDE** for further details on changing a partner's status.

4.4 Unit Hierarchy

As mentioned earlier, OM is organised into Areas and Fields and teams. The relationships between these Units, are called Unit hierarchy, and are described as parent-child relationships. A Parent unit co-ordinates the work of a number of child units.

Example: SOUTH AFRICA and ZIMBABWE are all Child units of the Parent unit SOUTHERN AFRICA AREA. Furthermore, SOUTHERN AFRICA AREA is itself a Child unit of the Parent unit OPERATION MOBILISATION. See Figure 4-1, on page 53.

There are some rules associated with hierarchy:

- A Parent unit can have any number of Child units attached to it

- Each Child unit can only be connected to one Parent unit.

4.4.1 Accessing and viewing Unit Hierarchy

The current hierarchy assignment for the selected unit can be viewed in the *Unit Structure List Screen*. From the pull-down menu on the *Unit Maintenance Screen* (Figure 4-3), select *Hierarchy*. The *Unit Structure List Screen* appears.

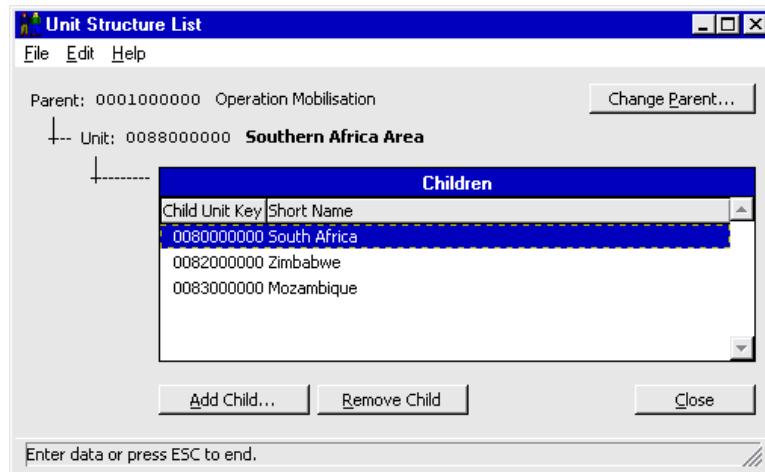


Figure 4-4 Unit Structure List Screen

Parent unit and Child unit assignments can be changed from this screen as explained in the following sections.

4.4.2 Adding a new Parent Unit

1. On the Unit Structure List Screen (Figure 4-4) click the **New Parent** button and the *New Parent Selection Screen* appears.

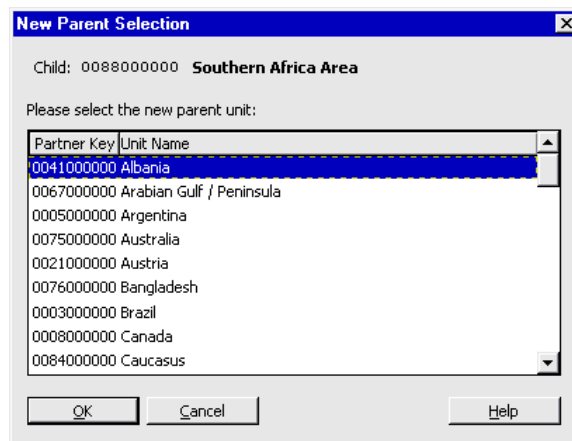


Figure 4-5 New Parent Selection Screen

2. Select a unit from the list which you want as the new Parent unit and click **OK**. Alternatively, if there is no suitable unit to use as the Parent, click **Cancel** and you will return to the *Unit Structure List Screen* with no assignment being made.
3. See section 4.4.3, Adding a new Child Unit, page 56 if you wish to add Child assignments. Otherwise click **Close** to return to the *Unit Maintenance Screen*.

4.4.3 Adding a new Child Unit

1. On the *Unit Structure List Screen* (Figure 4-4) click the **Add Child** button and a *Unit Find Screen* appears.

2. Select from the list the unit which you want as the new Child unit and click **OK**.
3. Note: You cannot use this screen to adopt a unit which already has a Parent. If you want to select a unit which already has a Parent you must first delete that Parent/Child assignment as described in section 4.4.4, page 57, or go to the Child unit and select a new parent.
4. Click **Close** to return to the *Unit Maintenance Screen*.

4.4.4 Deleting a Child Unit Assignment

A Child unit assignment can be deleted if the relationship is no longer valid or if you wish to reassign the Child unit to another Parent unit. This may be done either from the existing parent unit, or from the child unit itself.

1. Go to Unit Hierarchy for the existing Parent unit, as described in section 4.4.1. On the *Unit Structure List Screen* (Figure 4-4) highlight the Child unit assignment you wish to break and click the **Delete** button.
2. A message box appears that says: *You have chosen to delete this record. Do you really want to delete it?*

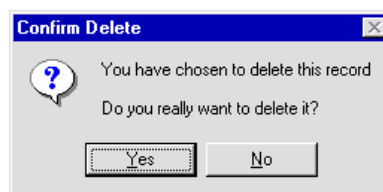


Figure 4-6 Confirm Delete Box

3. Click **Yes** only if you are really sure that you wish to delete this Child unit. If you are not sure that you want to delete the Child unit click **No** and the message box will disappear and nothing will be deleted.

Note Deleting a Child unit does not actually delete any units from the PETRA database. Instead, it breaks the assignment of the Child unit to the Parent unit.

4. Click **Close** to return to the *Unit Maintenance Screen*.

4.5 Unit Jobs

For each unit there are a number of jobs that may be identified as critical to the working of the unit. For example, each team needs a Team Leader. These jobs can be recorded in the *Unit Job Maintenance Screen* and form the basis of job vacancy reports.

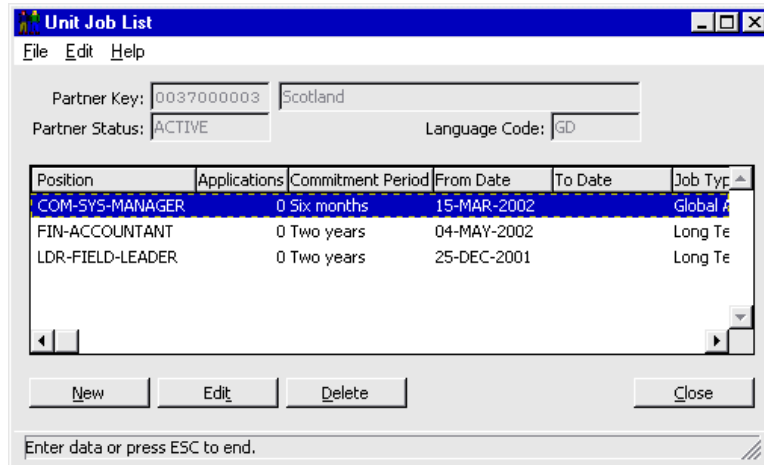
For each job there are associated records that identify different aspects of the job requirement. These form part of the unit job and are more fully explained in other sections as follows:

- **Job Ability** (See section 4.5.2, page 59)
- **Job Language** (See section 4.5.3, page 60)
- **Job Qualification** (See section 4.5.4, page 61)
- **Job Vision** (See section 4.5.5, page 62)

4.5.1 Adding or Editing Unit Jobs

1. From the menu bar of the *Unit Maintenance Screen* (Figure 4-3), select **Unit-Maintenance** and then **Jobs**. The *Unit Job List Screen* appears.

Figure 4-7 Unit Job List Screen



Unit Job List

File Edit Help

Partner Key: 0037000003 Scotland

Partner Status: ACTIVE Language Code: GD

Position	Applications	Commitment Period	From Date	To Date	Job Type
COM-SYS-MANAGER	0	Six months	15-MAR-2002		Global A
FIN-ACCOUNTANT	0	Two years	04-MAY-2002		Long Te
LDR-FIELD-LEADER	0	Two years	25-DEC-2001		Long Te

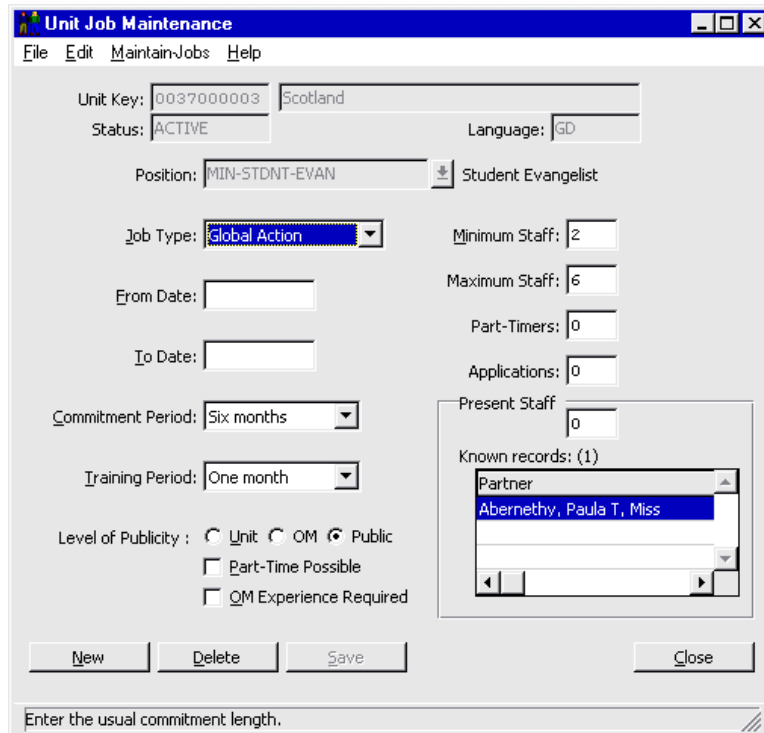
New Edit Delete Close

Enter data or press ESC to end.

This lists all existing job positions that have been entered for this Unit.

- To edit an existing job, highlight it and click **Edit**. To enter a new job, click **New**. The *Unit Job Maintenance Screen* appears.

Figure 4-8 Unit Job Maintenance Screen



Unit Job Maintenance

File Edit Maintain-Jobs Help

Unit Key: 0037000003 Scotland

Status: ACTIVE Language: GD

Position: MIN-STDNT-EVAN Student Evangelist

Job Type: Global Action

From Date:

To Date:

Commitment Period: Six months

Training Period: One month

Level of Publicity : ☐ Unit ☐ OM ☒ Public

☐ Part-Time Possible

☐ OM Experience Required

Minimum Staff: 2

Maximum Staff: 6

Part-Timers: 0

Applications: 0

Present Staff: 0

Known records: (1)

Partner: Abernethy, Paula T, Miss

New Delete Save Close

Enter the usual commitment length.

- Enter data as required:

Position Select the Position for the job using the menu button. The Position is the formal name for the job and has certain qualification requirements. Once the **Save** button has been pressed this box can no longer be edited.

Job Type Select the Job Type (short or long term) using the menu button.

From Date and To Date Enter the duration of the job.

Commitment Period Select the Commitment Period using the menu button.

Training Period Select the Training Period for this job using the menu button.

Level of Publicity Identify where the job will be advertised by selecting either UNIT, OM or PUBLIC for Level of Publicity.

Part-Time Possible Check the box if the job position could be filled by a part-time worker.

OM Experience Required Check the box if the Job Position requires someone who has relevant experience within OM.

Minimum Staff and **Maximum Staff** Enter the minimum and maximum number of staff, of the given Position, which the unit can accommodate.

Present Staff Enter number of staff, of the given Position, who are working within the unit now.

Part Timers Enter the current number of staff who can work part-time within the unit in the given position.

Applications Enter the number of applications for the given Position that are being processed.

Known Records This panel is for information only. It relates to Job Assignments (see section 4.6), and lists the people who are currently holding this post. In the example in Figure 4-8, up to 6 people can be accommodated as student evangelists, and Paula Abernethy is the only one recorded as assigned to this post.

4. Click the **Save** button to save the data you have already entered.
5. At this point you can choose to create Job Ability, Job Language, Job Qualification and Job Vision records associated with this unit job or you can choose to add these at a later date. See the following sub-sections sections for instructions on adding these records.
6. Click **Save**, then **Close** (or **New** if you wish to enter another unit job.)

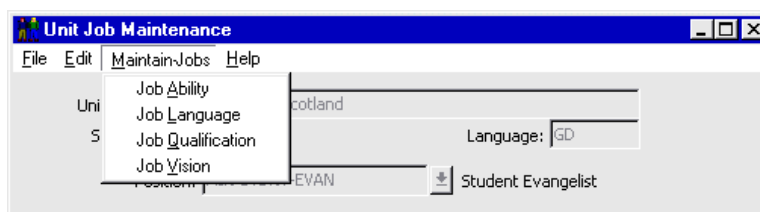
4.5.2 Job Ability

For each Unit Job record any number of Job Ability records may be attached. For example, the unit job record for a Field Leader may have Job Ability records for MIN-PASTORAL and MIN-COUNSEL. These Job Ability records are used to specify the capabilities a person needs to do the job.

Job Ability records are accessed from inside the *Unit Job Maintenance Screen*.

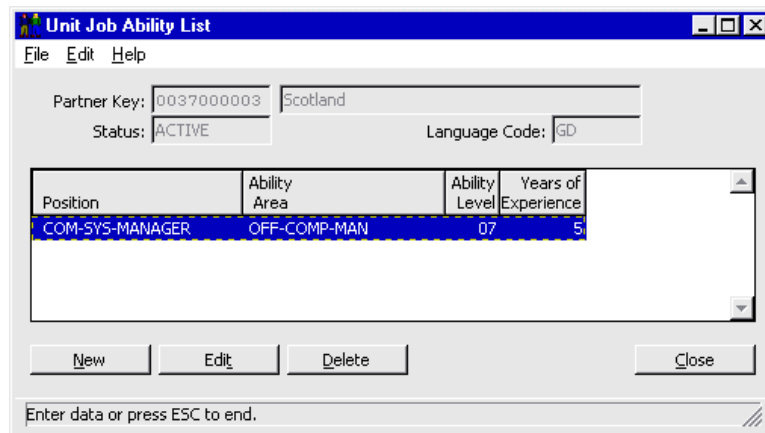
1. Open the *Unit Job Maintenance Screen* for the job that you wish to maintain (Figure 4-8).
2. On the menu bar, click Maintain-Jobs to see the various options available (Figure 4-9).

Figure 4-9 Maintain-Jobs menu on Job Maintenance Screen



3. From the Maintain-Jobs menu at the top of this screen select Job Ability. The *Unit Job Ability List Screen* appears.

Figure 4-10 Unit Job Ability List Screen



The screenshot shows the 'Unit Job Ability List' window. At the top, there's a menu bar with 'File', 'Edit', and 'Help'. Below it, there are input fields for 'Partner Key' (0037000003), 'Scotland', 'Status' (ACTIVE), and 'Language Code' (GD). A table lists job abilities with columns: Position, Ability Area, Ability Level, and Years of Experience. The first row is highlighted: COM-SYS-MANAGER, OFF-COMP-MAN, 07, 5. At the bottom, there are buttons for 'New', 'Edit', 'Delete', and 'Close'. A status bar at the very bottom says 'Enter data or press ESC to end.'

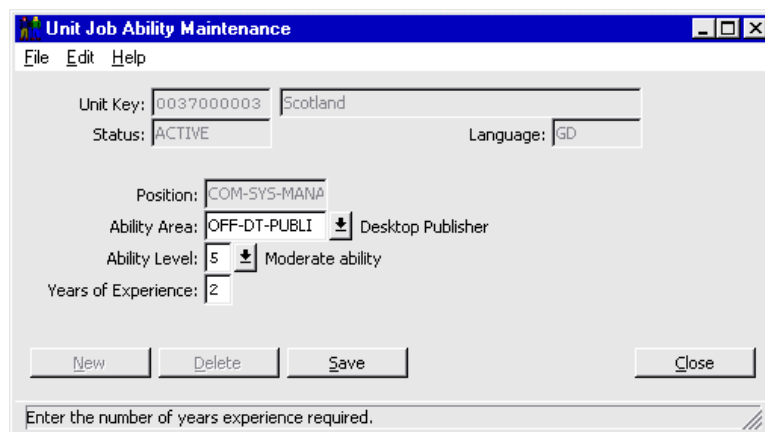
Position	Ability Area	Ability Level	Years of Experience
COM-SYS-MANAGER	OFF-COMP-MAN	07	5

Job ability records can be created, edited and deleted from this screen.

Example We are entering the abilities required for the job position of Computer Systems Manager. We have already entered that fact that he/she must have experience and ability as a computer manager (see Figure 4-10). We wish to add that some knowledge of desk-top publishing is also necessary.

- To enter a new job ability, click New. (To edit an existing job ability, highlight it and click **Edit**.) The *Unit Job Ability Maintenance Screen* appears showing the particular Job position.

Figure 4-11 Unit Job Ability Maintenance Screen



The screenshot shows the 'Unit Job Ability Maintenance' window. It has a menu bar with 'File', 'Edit', and 'Help'. Input fields include 'Unit Key' (0037000003), 'Scotland', 'Status' (ACTIVE), and 'Language' (GD). Below these, there are dropdown menus for 'Position' (COM-SYS-MANA), 'Ability Area' (OFF-DT-PUBLI), 'Ability Level' (5), and 'Years of Experience' (2). To the right of the 'Ability Area' dropdown, the text 'Desktop Publisher' is visible. At the bottom, there are buttons for 'New', 'Delete', 'Save', and 'Close'. A status bar at the very bottom says 'Enter the number of years experience required.'

- Enter Data as required:
 - Ability Area** Select the Ability Area required for the job using the menu button.
 - Ability Level** Select the required Ability Level for this ability using the menu button.
 - Years of Experience** Enter the number of years of experience in this ability which is required for the job.
- Click **Save**, then **Close** (or **New** if you wish to enter another ability for this job position.)

4.5.3 Job Language

For each Unit Job any number of Job Language records may be attached. These specify the language skills a person needs to do the job.

- Open the *Job Maintenance Screen* for the job that you are maintaining (see Figure 4-8).
- From the menu bar on the *Job Maintenance Screen*, select Job Language (see Figure 4-9). The *Job Language List Screen* appears.

- To edit an existing job language, highlight it and click **Edit**. To enter a new job language, click **New**. The *Unit Job Language Maintenance Screen* appears showing the particular Job position.

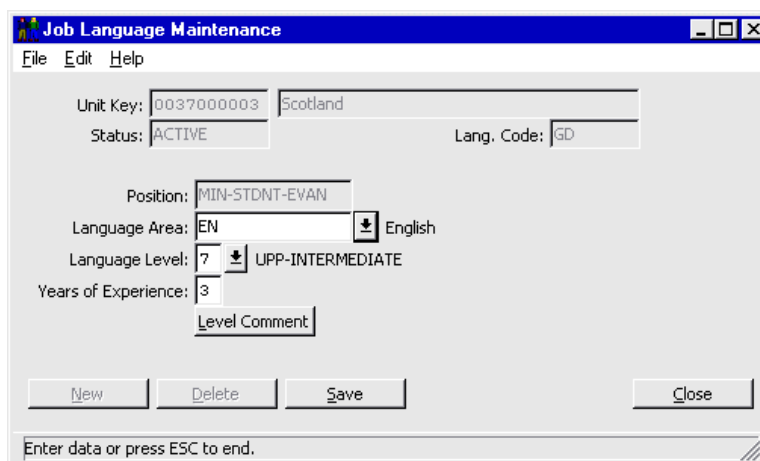


Figure 4-12 Job Language Maintenance Screen

- Enter data as required:

Language Area Select the Language Area using the menu button. The Language Area identifies the actual language needed for this particular job.

Language Level Select the Language Level using the menu button. The Language Level describes the competence required in using this language. To see a definition of the Language Level chosen click on the Level Comment and an information box appears which describes this Ability Level.

Years of Experience Enter the number of Years of Experience required in this language.

- Click **Save**, then **Close** (or **New** to enter an additional job language.)

4.5.4 Job Qualification

Each Unit Job can have one or more Job Qualifications associated with it. The Job Qualifications specifies any professional qualifications necessary to do the job.

- Open the *Job Maintenance Screen* for the job that you are maintaining (see Figure 4-8).
- From the menu bar on the *Job Maintenance Screen*, select Job Qualification (see Figure 4-9). The *Unit Job Qualification Maintenance Screen* appears showing the Job position.

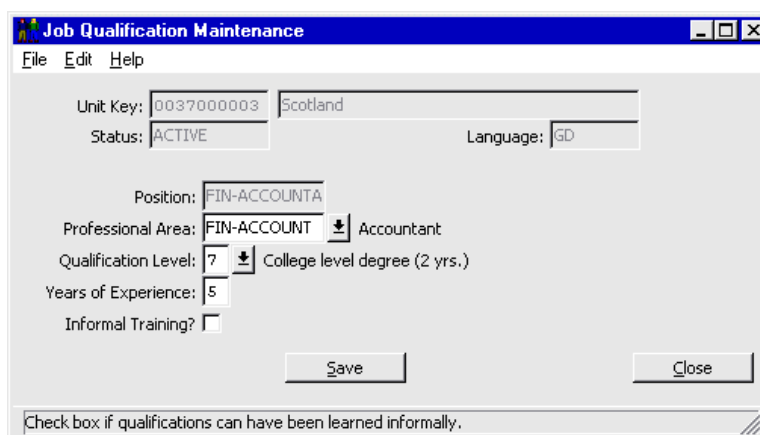


Figure 4-13 Job Qualification Maintenance Screen

- Enter data as required.

Professional Area Use the menu button to select the Professional Area in which a qualification is required for this job position.

Qualification Level Select the Qualification Level using the menu button.

Years of Experience Enter the number of Years of Experience, with this qualification, which is required for the job.

Informal Training If informal training is adequate, check this box.

4. Click **Save**, then **Close**.

4.5.5 Job Vision

For each Unit Job record any number of Job Vision records may be attached. These Job Vision records are used to identify the main focus or direction the person needs to have to fulfil the job. For example, if a team is involved in outreach, which intends to use a lot of music, the unit job of TEAM LEADER may be assigned Job Vision records for EVANGELISM and MUSIC.

1. Open the *Job Maintenance Screen* for the job that you are maintaining (see Figure 4-8).
2. From the menu bar on the *Job Maintenance Screen*, select **Job Vision** (see Figure 4-9). The *Job Vision List Screen* appears.
3. To edit an existing job vision, highlight it and click **Edit**. To enter a new job vision, click **New**. The *Unit Job Vision Maintenance Screen* appears showing the particular Job position.

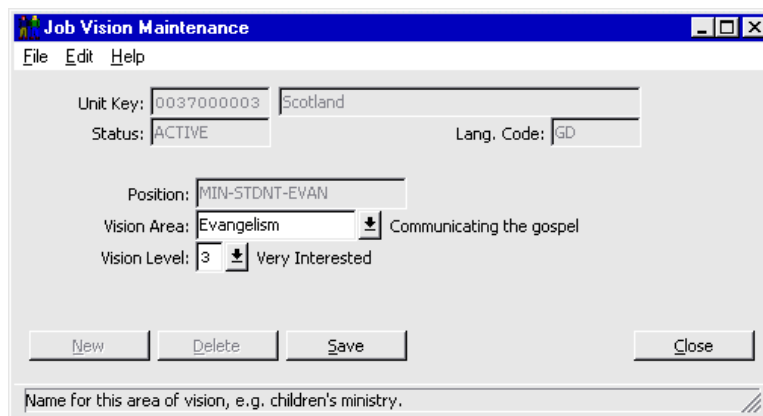


Figure 4-14 Job Vision Maintenance Screen

4. Enter data as required:

Vision Area Select the Vision Area required for the job using the menu button.

Vision Level Select the Vision Level for this vision area using the menu button.

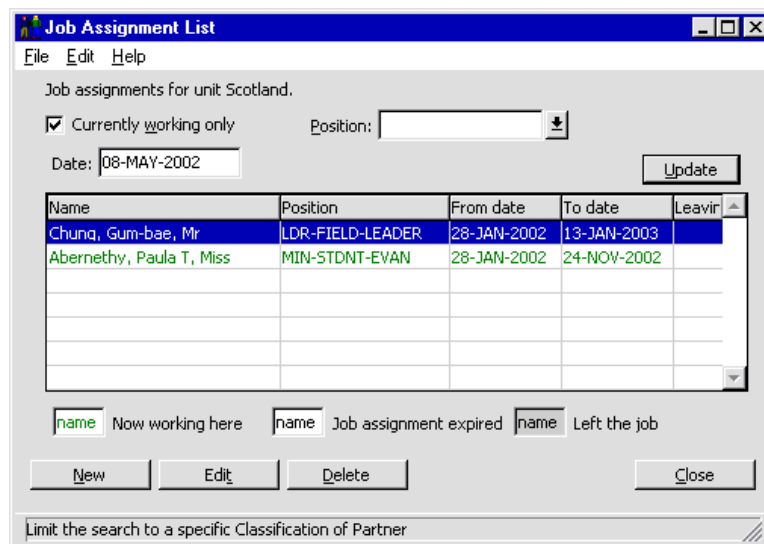
5. Click **Save**, then **Close** (or **New** to enter another vision record for this job).

4.6 Job Assignments

Most of the items in this chapter are concerned with the Unit, its job positions and requirements. In principle these exist, whether or not there is anyone to actually do any of the jobs! In this section we can actually assign a person to a job, and so record the people in the actual team. Job assignments can only be set up after the job to be assigned has already been entered (as in section 4.5.1, page 57).

1. To enter a job assignment:
2. From the menu bar of the *Personnel Screen*, select **Units**, then **Unit**, and use the *Find Screen* to find the unit that you wish to maintain. Click **Accept** and the *Unit Maintenance Screen* appears (as in Figure 4-3, page 55).
3. From the menu bar, select **Unit Maintenance**, then **Job Assignments**. The *Job Assignment List Screen* appears.

Figure 4-15 Job Assignment List Screen, showing two members assigned to the team



Job Assignment List

File Edit Help

Job assignments for unit Scotland.

☒ Currently working only Position:

Date: 08-MAY-2002

Name	Position	From date	To date	Leavir
Chung, Gum-bae, Mr	LDR-FIELD-LEADER	28-JAN-2002	13-JAN-2003	
Abernethy, Paula T, Miss	MIN-STDNT-EVAN	28-JAN-2002	24-NOV-2002	

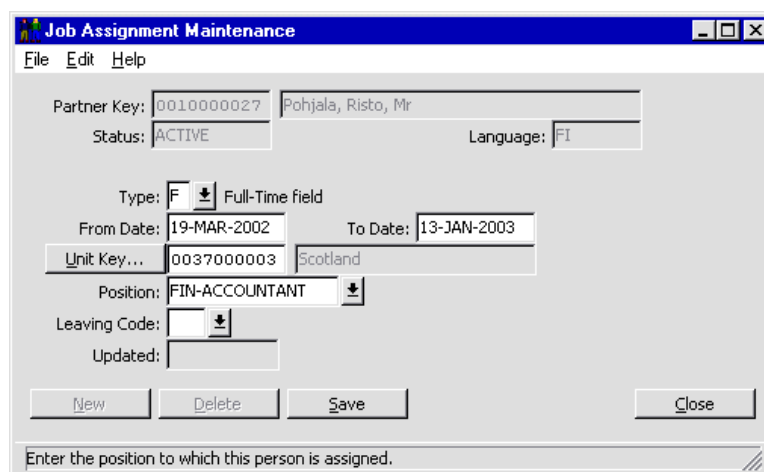
Now working here Job assignment expired Left the job

Limit the search to a specific Classification of Partner

This screen lists all the assignments that have been made. Initially the list shows assignments to all job positions that have been entered for this unit. If you wish just to see people assigned to one particular position, select this position from the drop-down **Position** box, and click **Update**.

- To enter a new assignment, click **New**. To update an existing assignment, highlight it and click **Edit**. The *Job Assignment Maintenance Screen* appears.

Figure 4-16 Job Assignment Maintenance Screen



Job Assignment Maintenance

File Edit Help

Partner Key: 0010000027 Pohjala, Risto, Mr

Status: ACTIVE Language: FI

Type: F Full-Time field

From Date: 19-MAR-2002 To Date: 13-JAN-2003

Unit Key... 0037000003 Scotland

Position: FIN-ACCOUNTANT

Leaving Code:

Updated:

Enter the position to which this person is assigned.

- Enter data as required.

Position Select the position from the drop-down box. The list only shows job positions that have been entered for the unit.

Type Select Full-time, part-time, etc.

From / To Date Select the period for this assignment. At present this is not linked to Commitment Records.

Leaving Code This is used when someone leaves a position, to record the reason.

- Click **Save**, then **Close** (or **New** if you wish to enter a new job assignment.)

4.7 Unit Abilities, Languages and Vision

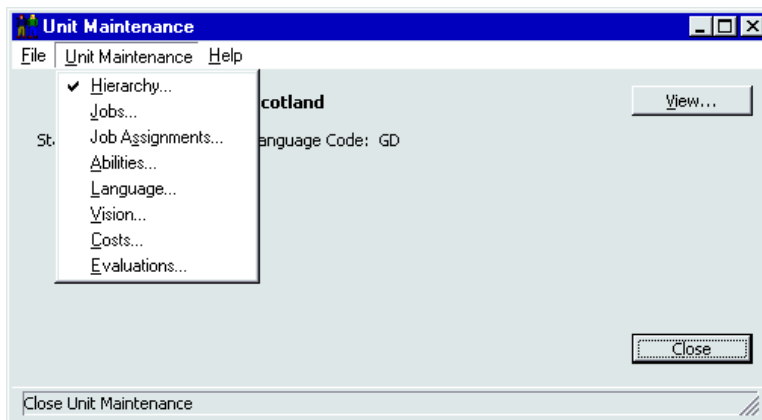
In the same way that required Abilities, Languages and Visions can be assigned to specific jobs in a unit, as described in section 4.5, they can also be assigned to the Unit as a whole. Often the Unit

abilities, languages and visions will reflect the key requirements of the team as a whole, and so will include many of the items specified in individual jobs.

To enter or edit Unit Abilities, Languages and Visions,

1. From the menu bar of the *Personnel Screen*, select **Units**, then **Unit**, and use the *Find Screen* to find the unit that you wish to maintain. Click **Accept** and the *Unit Maintenance Screen* appears.

Figure 4-17 Unit Maintenance menu on Unit Maintenance Screen



2. Select the item that you wish to maintain from the Unit Maintenance menu. The following subsections describe Unit Abilities, Unit Languages and Unit Visions.

4.7.1 Unit Abilities

Unit Ability records are used to specify the total set of abilities required within the unit as a whole. To work in a unit a person need not have all the abilities recorded but would probably need at least one of these abilities. Any number of Unit Ability records may be created for a particular unit.

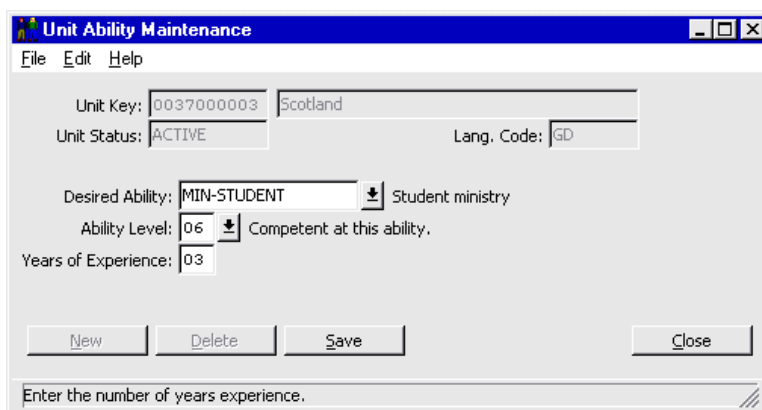
When seeking to identify whether an applicant is suitable for a particular unit the Unit Abilities would normally be checked.

Unit Ability records should not be confused with Unit Job Ability Records (section 4.5.2, page 59) which record the abilities associated with a specific job rather than the unit as a whole. However, any abilities defined in Unit Jobs would normally also be found under Unit Abilities.

To enter or edit Unit Abilities,

1. On the *Unit Maintenance Screen*, select **Unit Maintenance**, then **Abilities** (see Figure 4-17). The *Unit Ability List Screen* appears.
2. To edit an existing unit ability, highlight it and click **Edit**. To enter a new unit ability, click **New**. The *Unit Ability Maintenance Screen* appears.

Figure 4-18 Unit Ability Maintenance Screen



3. This is similar to the individual Job Ability Maintenance Screen (see section 4.5.2). Select the **Ability**, **Ability Level** and **Years of Experience** relevant to the work of the Unit.
4. Click **Save**, then **Close** (or **New** to enter another ability record for the Unit).

4.7.2 Unit Language

Unit Language records are used to specify the total set of language skills desired within the unit as a whole. To work in a unit a person need not have all these languages but would probably need at least one. Any number of Unit Language records may be created for a particular unit.

When seeking to identify whether an applicant is suitable for a particular unit the Unit Languages would normally be checked.

Unit Language records should not be confused with Unit Job Language Records (section 4.5.3, page 60) which record the language requirements for a specific job rather than the unit as a whole. However, any languages defined in Unit Jobs would normally also be found under Unit Languages.

To enter or edit Unit Languages,

1. On the *Unit Maintenance Screen*, select Unit Maintenance, then Languages (see Figure 4-17). The *Unit Language List Screen* appears.
2. To edit an existing unit language, highlight it and click **Edit**. To enter a new unit language, click **New**. The *Unit Language Maintenance Screen* appears.

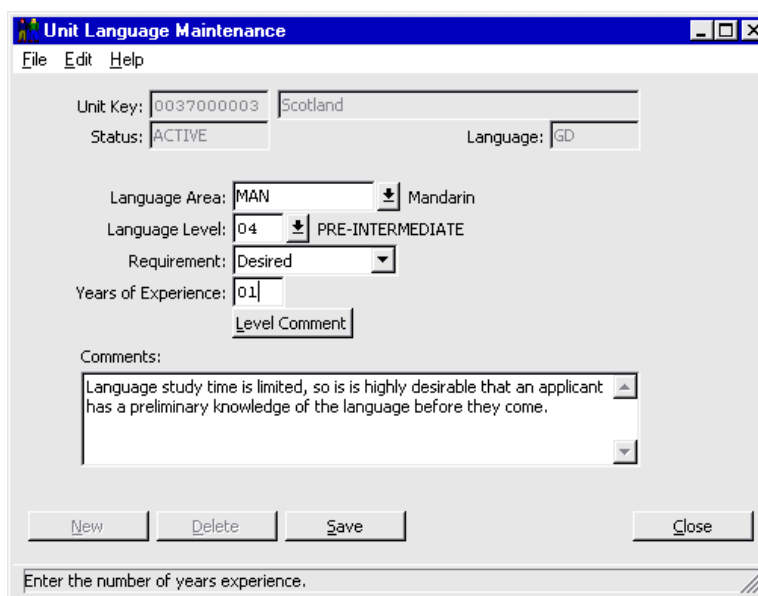


Figure 4-19 Unit Language Maintenance Screen

3. Enter data as required. This is similar to the individual *Job Language Maintenance Screen* (see section 4.5.3), but an additional field is added for comments.

Language Area Select the Language Area using the menu button.

Language Level Select the Language Level required for this language using the menu button. To obtain a definition of the Language Level chosen click on the **Level Comment** button and an information box appears which describes this Language Level.

Requirement Use the menu button to select whether this language is required or desired. A required language is one that an applicant must have to join the unit. A desired language is one that would be helpful for an applicant to have.

Years of Experience Enter the number of Years of Experience in this language which is required for the team or unit.

Comments In the Comments box enter any additional information regarding the use of this language in the unit.

4. Click **Save**, then **Close** (or **New** to enter another language record for this Unit).

4.7.3 Unit Vision

Unit Vision records are used to identify a set of visions desired within the unit as a whole. To work in a unit a person need not have all these visions but would probably need at least one. When seeking to identify whether an applicant is suitable for a particular unit the Unit Visions would normally be checked. For example, if a team is involved in outreach then visions such as EVANGELISM and MUSIC may be desired. A unit which has a large building and is seeking to expand would probably desire someone on the team to have a vision such as MAINTENANCE. Any number of Unit Vision records may be created for a particular unit.

Unit Vision records should not be confused with Unit Job Vision Records (section 4.5.5, page 62) which record the vision requirements for a specific job rather than the unit as a whole. However, any visions defined in Unit Jobs would normally also be found under Unit Visions.

1. On the *Unit Maintenance Screen*, select Unit Maintenance, then Visions (see Figure 4-17). The *Unit Vision List Screen* appears.
2. To edit an existing unit vision, highlight it and click **Edit**. To enter a new unit vision, click **New**. The *Unit Vision Maintenance Screen* appears.



Figure 4-20 Unit Vision Maintenance Screen

3. Enter data as required. This is similar to the individual *Job Vision Maintenance Screen* (see section 4.5.5).

Vision Area Select the Vision Area using the menu button.

Vision Level Select the Vision Level for this vision using the menu button.

4. Click **Save**, then **Close** (or **New** to enter another vision record for this Unit).

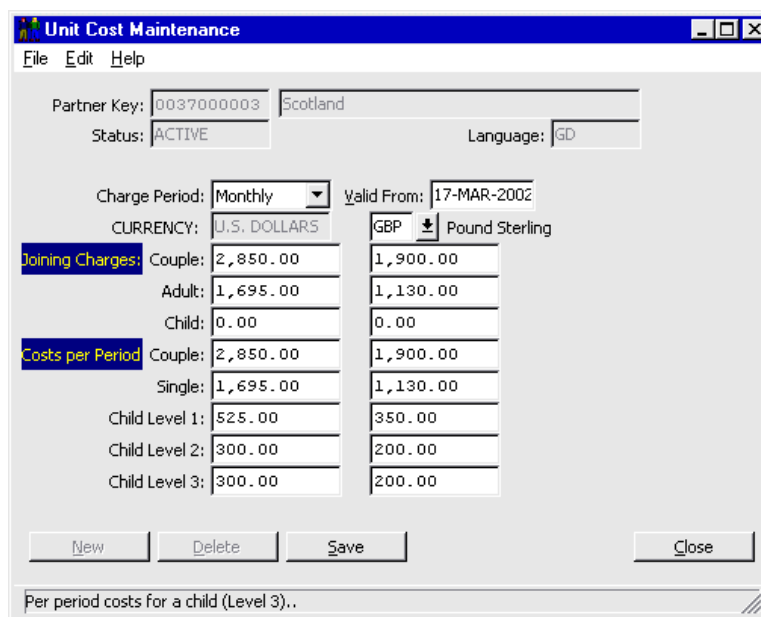
4.8 Unit Costs

Unit Cost records are used to keep track of the regular expenses of running the unit. When the costs change an existing record can be edited or a new record can be created. The advantage of creating a new record is that a history of previous costs can be maintained in separate records. Each record includes different costs for a couple, single person, children, etc. Amounts must be entered in US dollars, as well as local currency.

To create a cost record:

1. On the *Unit Maintenance Screen*, select Unit Maintenance, then Costs (see Figure 4-17). The *Unit Cost List Screen* appears.

- To edit an existing unit cost record, highlight it and click **Edit**. To enter a new unit cost record, click **New**. The *Unit Vision Maintenance Screen* appears.



The screenshot shows the 'Unit Cost Maintenance' window. It has a menu bar with 'File', 'Edit', and 'Help'. Below the menu bar, there are input fields for 'Partner Key' (0037000003), 'Status' (ACTIVE), 'Language' (GD), and 'Valid From' (17-MAR-2002). A 'Charge Period' dropdown is set to 'Monthly'. The 'CURRENCY' is set to 'U.S. DOLLARS', with a button to switch to 'GBP Pound Sterling'. The screen is divided into two main sections: 'Joining Charges' and 'Costs per Period'. Each section has a table with two columns for US Dollars and the local currency. The 'Joining Charges' table has rows for Couple, Adult, and Child. The 'Costs per Period' table has rows for Couple, Single, and three Child Levels. At the bottom, there are buttons for 'New', 'Delete', 'Save', and 'Close'. A status bar at the very bottom reads 'Per period costs for a child (Level 3)..'

Category	Unit	U.S. DOLLARS	GBP Pound Sterling
Joining Charges	Couple:	2,850.00	1,900.00
	Adult:	1,695.00	1,130.00
	Child:	0.00	0.00
Costs per Period	Couple:	2,850.00	1,900.00
	Single:	1,695.00	1,130.00
	Child Level 1:	525.00	350.00
	Child Level 2:	300.00	200.00
	Child Level 3:	300.00	200.00

Figure 4-21 Unit Cost Maintenance Screen

- Enter data as required:

Charge Period Select the Charge Period for the costs in this record, using the menu button.

Valid From Enter the date when the costs in this record start to apply.

Currency Select the local currency for the Unit using the menu button.

Couple, Adult and Child Enter the joining cost for a Couple, an Adult and a Child, in US Dollars and also in the local currency.

Couple, Single and Child Level 1/2/3 Enter the regular Costs per Period for a Couple, a Single and a Child, in US Dollars and also in the local currency. There are three child levels which can be set according to various factors such as age of child, number of children in family, etc, depending on local needs.

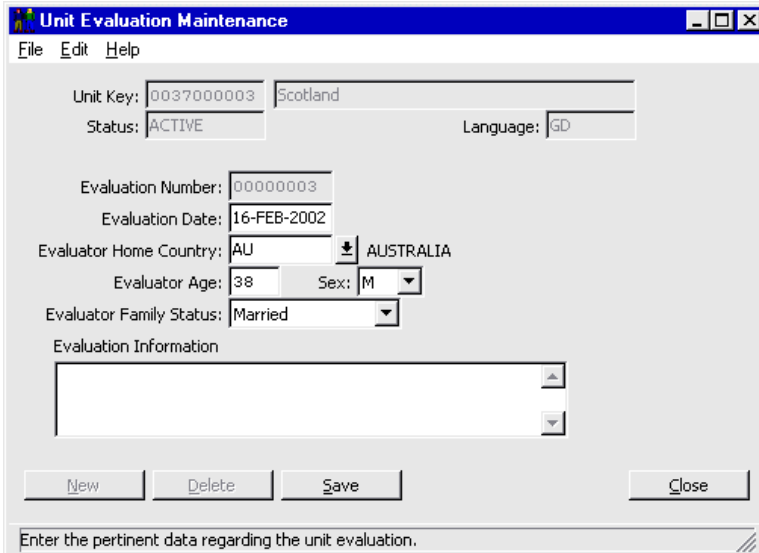
- Click **Save**, then **Close**, then **Close** again.

4.9 Unit Evaluations

Unit Evaluation records are used to record performance assessments or progress for a particular team or unit. It is assumed that these evaluations will be made regularly and a separate evaluation record will be created for each assessment made. Hence, any number of Unit Evaluation records may be created for a particular unit.

To create a Unit evaluation record:

- On the *Unit Maintenance Screen*, select Unit Maintenance, then Evaluation (see Figure 4-17). The *Unit Evaluation List Screen* appears.
- To edit an existing unit evaluation record, highlight it and click **Edit**. To enter a new unit evaluation record, click **New**. The *Unit Evaluation Maintenance Screen* appears.



The screenshot shows a Windows-style application window titled "Unit Evaluation Maintenance". It has a menu bar with "File", "Edit", and "Help". The form contains several input fields and dropdown menus:

- Unit Key:** 0037000003
- Status:** ACTIVE
- Language:** GD
- Evaluation Number:** 00000003
- Evaluation Date:** 16-FEB-2002
- Evaluator Home Country:** AU (dropdown menu showing AUSTRALIA)
- Evaluator Age:** 38
- Sex:** M (dropdown menu)
- Evaluator Family Status:** Married (dropdown menu)
- Evaluation Information:** A large text area for notes.

At the bottom, there are four buttons: "New", "Delete", "Save", and "Close". A status bar at the very bottom says "Enter the pertinent data regarding the unit evaluation."

Figure 4-22 Unit Evaluation Maintenance Screen

3. Enter data as required:

Evaluation Date Enter the Evaluation Date when the assessment is carried out.

Evaluator Home Country Select the Home Country of the evaluator using the menu button. This is the Home field of the person carrying out the evaluation.

Evaluator's Age and Sex The Evaluator's age and sex can be entered if important.

Evaluator Family Status Select the Evaluator Family Status using the menu button.

Evaluation Information In the Evaluation Information box enter the main details of the evaluation. As much or as little detail can be entered to sufficiently assess the unit.

4. Click **Save**, then **Close**, then **Close** again.

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

Chapter 5 Personnel Reports

PETRA provides many different reports relevant to the Personnel functions. It may be necessary from time to time to keep printed copies of PETRA information as a record of past data held on the system. For example, at a new recruits conference an organiser may want details of arrival and departure times for all the participants. A PETRA database which holds information about new recruits can be made to print a specific report for this purpose.

Full details about performing a print operation, including a description of all the printing options, are given in the GENERAL USER GUIDE, but this chapter introduces the specific reports relevant to Personnel.

There are four main types of Personnel Report, which are explained in this Chapter.

- **Special Personnel Reports** - these give information on all members of the Organisation entered in the office PETRA database.
- **Short-term Reports** - these give specific detail useful for short-term events, and can be set to include only those people attending a particular conference or campaign, or already listed in an existing extract.
- **Partner Pre-selection Form** - these relate to one particular application from one individual, and print details which can then be set to a potential Receiving Field.
- **General Reports** - These allow you to print information from almost any data entry screen.

The first two types of report can be printed from the Reports menu on the menu bar at the top of the main *Personnel Screen*.



Figure 5-1 Personnel Screen, showing Reports menu

The first item, Extracts, is a short-cut to the Extract function of the Partner Module (this allows you to select a group of partners, and is explained in the PARTNER USER GUIDE). Short-Term Reports leads to a further choice from a set of reports for short-term events. The remaining items are special personnel reports for all members of the Organisation held in the local database.

5.1 Special Personnel Reports

These are selected from the Reports menu (Figure 5-1). The different reports are listed in the table below. The general procedure is explained in section 5.1.1. However, several of the reports of special

features and these are explained in the sections that follow. The column “Page” in the table shows the page number for those reports that have additional information.

Report	Description	Page
Individual Data Report	Prints out all Personnel data on a selected member.	73
Birthday List	Lists birthdays for all Organisation members entered in the local PETRA database.	71
Emergency Contact	Lists emergency contact details for all Organisation members entered in the local PETRA database.	
Passport Expiry	Lists the dates that Organisation members’ passports expire.	
Personal Document Expiry	Lists the dates that some or all types of personal document expire.	
Local Personnel Data	Lists details entered for the partner under the local personnel data labels.	72
Local Application Data	Similar to local personnel data, but relates to data items used by the local office to manage applications.	72
GA Start of Commitment	List all people on database who have commitments starting between selected dates.	71
End of Commitment	Lists the dates that all current commitments end.	
Previous Experience	Lists the items of previous experience which have been entered in the local PETRA database.	
Progress Report Log	Lists the dates of all members’ progress reports.	
Campaign Options	Lists all those who have applied for campaigns, showing their preferred options.	72
Unit Hierarchy	When you select a unit, this gives a listing of all the dependent (child) units. You can choose whether to include campaigns or conferences.	

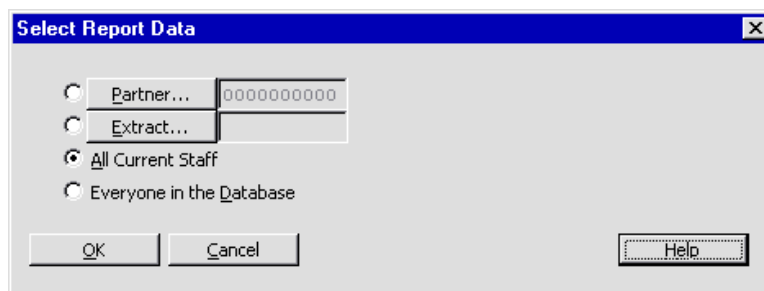
5.1.1 To Print a Report - General

The procedure for printing all the above reports is similar. Specific notes on individual reports follow the main description on how to print.

1. From the menu bar of the *Personnel Screen* (Figure 5-1), select **Reports**, then the report that you wish to print.
2. A screen appears asking you to select the data that you require. For most reports this is as shown in Figure 5-2. Select either an individual partner, an extract of partners, everyone in the Database or a Date Range. If you wish to select an individual partner or an extract, in either case a Find Screen appears to help you find the partner or the extract.

Tip – Last Partner/Extract If the partner or extract you require is the last one you worked on, click the circle to the left of the **Partner** or **Extract** buttons, and the last partner/extract used is automatically selected.

Figure 5-2 Select Report Data Screen, allowing you to select the partners required

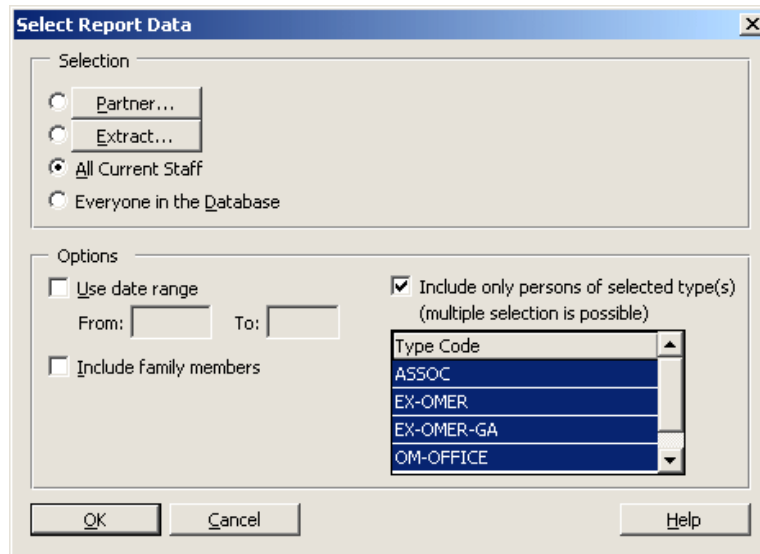


3. When you click **OK**, a *Start Print Screen* appears. Print in the normal way, as described in the GENERAL USER GUIDE. It is recommended to print to screen first, to ensure that the report is correct before printing to paper.

5.1.2 Birthday List Report

To print the **Birthday List Report**, follow the instructions above, but there are more options for selecting who to include. The *Select Report Data Screen* is as follows.

Figure 5-3 Select Report Data Screen for Birthday List Report



The screenshot shows the 'Select Report Data' dialog box. It has two main sections: 'Selection' and 'Options'. In the 'Selection' section, there are four radio buttons: 'Partner...', 'Extract...', 'All Current Staff' (which is selected), and 'Everyone in the Database'. In the 'Options' section, there are two checkboxes: 'Use date range' (unchecked) and 'Include family members' (unchecked). To the right of these is a checked checkbox 'Include only persons of selected type(s) (multiple selection is possible)'. Below this is a list box titled 'Type Code' containing four items: 'ASSOC', 'EX-OMER', 'EX-OMER-GA', and 'OM-OFFICE'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

The upper Selection allows you to specify all current staff or everyone in the database. The Options in the lower panel allow you to be more selective. (Only partners with status ACTIVE are shown.)

Use Date Range The **From** and **To Date** fields. Enter dates to give a report of all birthdays between these dates. The dates can span the end of a calendar year, so, for example, From November To January is possible.

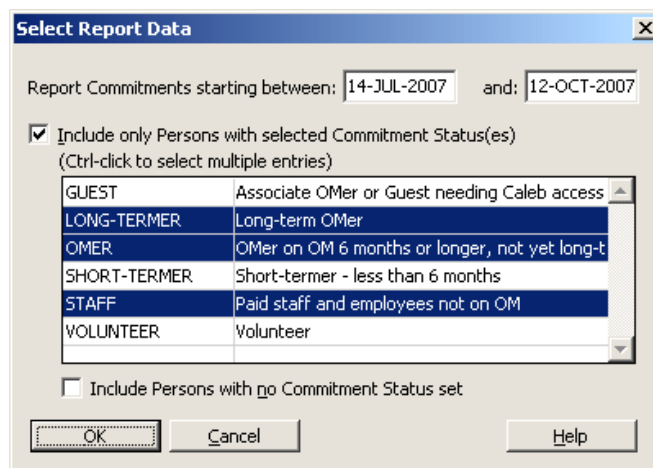
Include Family Members Check this box to include all other members of the families whose birthdays fall in the date range given.

Include only persons or selected types This list allows you to select only people marked with certain special types. When the screen is opened, all special types in the list are selected by default. If required, you can just click on the type that you want. To selected multiple types, hold down the <Ctrl> key while selecting.

5.1.3 Start of Commitment Report

Follow the instructions for printing a report, page 70, but the *Select Data Report Screen* will be as follows:

Figure 5-4 Select Report Data Screen for Start of Commitment Report, showing different commitment statuses



The screenshot shows the 'Select Report Data' dialog box for the Start of Commitment Report. It has a date range field at the top: 'Report Commitments starting between: 14-JUL-2007 and: 12-OCT-2007'. Below this is a checked checkbox 'Include only Persons with selected Commitment Status(es) (Ctrl-click to select multiple entries)'. Underneath is a list box with two columns: the first column lists commitment statuses, and the second column provides descriptions. The statuses listed are GUEST, LONG-TERMER, OMER, SHORT-TERMER, STAFF, and VOLUNTEER. At the bottom is an unchecked checkbox 'Include Persons with no Commitment Status set'. At the very bottom are 'OK', 'Cancel', and 'Help' buttons.

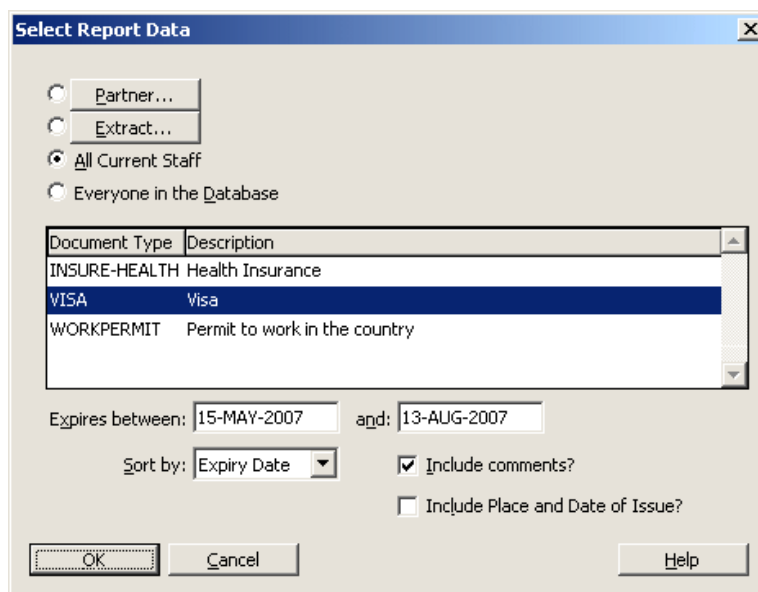
Commitment Status	Description
GUEST	Associate OMer or Guest needing Caleb access
LONG-TERMER	Long-term OMer
OMER	OMer on OM 6 months or longer, not yet long-t
SHORT-TERMER	Short-termer - less than 6 months
STAFF	Paid staff and employees not on OM
VOLUNTEER	Volunteer

When the screen opens, the check box at the upper left is not checked, and all commitments starting within the time range are included. If it is required to select certain types of commitment status, check this box. The main panel then opens, showing all the possible statuses. Select the one(s) you require. If you wish to include those for whom no commitment status has been sent (status 'UNKNOWN'), check the box at the bottom.

5.1.4 Personal Document Expiry Report

Follow the instructions for 5.1.1, 'To Print a Report - General' page 70, but in this case the *Select Data Report Screen* will be as follows:

Figure 5-5 Select Report Data Screen for Personal Document Expiry Report



Document Type	Description
INSURE-HEALTH	Health Insurance
VISA	Visa
WORKPERMIT	Permit to work in the country

Select one or more types of document for which the report should give the expiry dates. To selected multiple types, hold down the <Ctrl> key while selecting.

5.1.5 Campaign Options Report

For the Campaign Options report, you can select the year required (e.g. "2007") and/or the first two letters of the campaign code (for example "BE" for campaigns in Belgium.)

5.1.6 Local Personnel/Application Data Reports

The Local Personnel Data report and the Local Application Data report are a new style of report which gives the user much more flexibility as to which items are included. The reports work as follows:

- For the selected report, PETRA lists **all the relevant elements**, and offers a default layout.
- The user can choose to **add additional items** for the list of possible ones (or delete items) so that the report will include exactly what is required.
- The user can adjust the **size and position of the columns** showing the different elements, and then save the **report layout** for future use.
- The user can select which **order** the partners should be sorted in.
- Finally the user can select the **partner** or relevant **extract** of partners, and **generate** the report.

The following explains how to create the Local Personnel (or Application) Data reports.

1. From the menu bar of the Personnel Module screen select Reports, then Local Personnel Data or Local Application Data as required. The *Local Personnel (or Application) Data Screen* appears.

Control buttons >
Tabs >

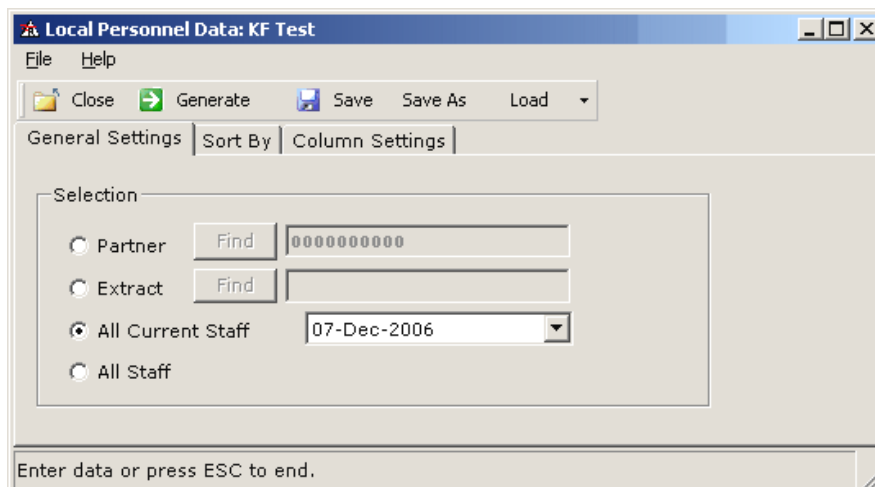


Figure 5-6 Local Personnel Data Report, showing control buttons and tabs.

The screen has three **Tabs**, which allow you to set up the structure of the report you require. The **Control buttons** allow you to save the structure, and to generate the report.

2. For the detail of how to use the various tabs and buttons, please see the description for Local Partner Data Reports, which is very similar. This is in the PARTNER USER GUIDE (at the time of writing this is section 7.4.2 on page 164 of the PARTNER USER GUIDE, but see the index entry for “local partner data, report”).

5.2 Individual Data Report

The Individual Data Report creates a complete printed record of all personnel information held on PETRA about an individual member. This report gives personnel data but does not include ALL information on this partner (for example it would not include information on gifts made). For a complete print of all data on that partner, ask the System Administrator to create a Full Partner Report, as described in the SYSTEM MANAGER USER GUIDE. If you are already working on a partner and have the *Individual Data Screen* open, then you can use the Report menu item on the menu bar (see Figure 2-2, page 15).

5.3 Short-term Reports

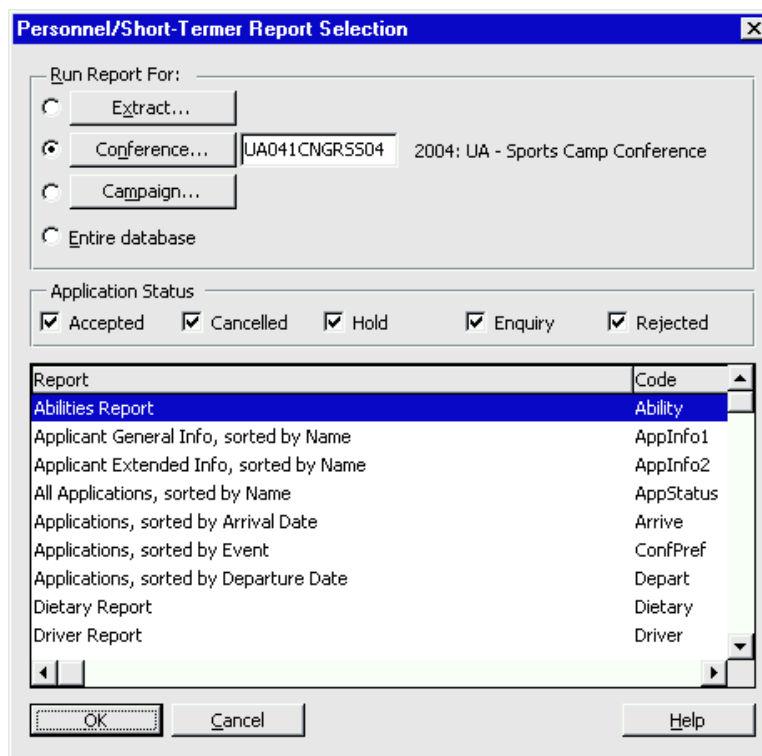
Short-term reports do not apply to everyone on the database, but allow you to choose the particular Conference, Campaign or Extract of interest. The different reports are as follows:

Report	Description
Abilities (Ability)	Lists partners' abilities as recorded in PETRA.
Applicant General Info (AppInfo1)	Lists basic information on all applicants, sorted by name.
Applicant Info 2 (AppInfo2)	Lists extended information on applicants, including some details such as Emergency Contact which are not included in AppInfo1.
Applicant Status (AppStatus)	Lists applications, showing the status (which are 'on hold', etc.)
Arrival Time (Arrive)	Lists arrival details of those attending an Event, sorted by arrival time
Event Preference (ConfPref)	Prints accepted applicants, sorted by the recorded Preferred Event, and showing original event preferences
Departure (Depart)	Lists departure details of all those attending an Event, sorted by departure time.

Dietary (Dietary)	Lists special dietary requirements for partners in the extract.
Drivers (Driver)	Lists names and status of all partners who have driving licence details recorded.
Emergency Contact (EmerCont)	Lists partners' emergency contact details and relationships.
Fellowship Groups (FellGrp)	Lists Fellowship Groups for those attending a conference.
Language (Language)	Lists the recorded language abilities for each partner.
Medical (Medical)	Lists special medical information recorded for partners (but not those marked 'Contact Sending Field').
Other Needs & Notes (Other Needs)	Lists contents or Other Needs and Notes fields of applications.
Party (Party)	Lists details of those travelling together in a group (party) to a conference.
Payment Status (PaymStat)	Lists partners showing whether conference/campaign/additional costs have been received.

To print a short-term report:

1. From the menu bar of the *Personnel Screen* select Reports, then Short-Term Reports. The *Personnel Report Selection Screen* appears.



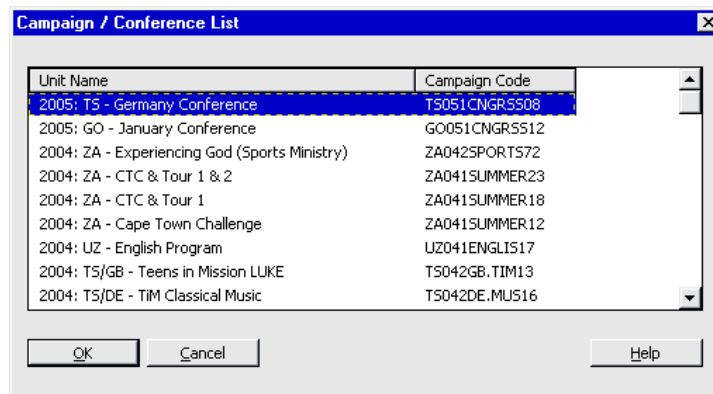
The screenshot shows the 'Personnel/Short-Term Report Selection' dialog box. It has a title bar with a close button. Inside, there's a section 'Run Report For:' with four radio buttons: 'Extract...', 'Conference...' (selected), 'Campaign...', and 'Entire database'. The 'Conference...' option is selected, and next to it is a text field containing 'UA041CNGR5504' and a label '2004: UA - Sports Camp Conference'. Below this is a section 'Application Status' with five checkboxes: 'Accepted' (checked), 'Cancelled' (checked), 'Hold' (checked), 'Enquiry' (checked), and 'Rejected' (checked). At the bottom is a list box with two columns: 'Report' and 'Code'. The list contains several reports, with 'Abilities Report' selected. The 'Code' for 'Abilities Report' is 'Ability'. Other reports include 'Applicant General Info, sorted by Name' (AppInfo1), 'Applicant Extended Info, sorted by Name' (AppInfo2), 'All Applications, sorted by Name' (AppStatus), 'Applications, sorted by Arrival Date' (Arrive), 'Applications, sorted by Event' (ConfPref), 'Applications, sorted by Departure Date' (Depart), 'Dietary Report' (Dietary), and 'Driver Report' (Driver). At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

Figure 5-7 Personnel Report Selection Screen

2. In the lower window, select the **report** that you wish to create.
3. Select the **Application Statuses** that you wish to be included in the report, by using the check boxes (Accepted, Cancelled, etc)
4. You must now select either the partners for whom you wish to run the report. The options are selected in the upper part of the screen. You can select an Extract, a Campaign or a Conference (the Conference will include all those due to attend Campaigns associated with that conference, even if they are marked 'Campaign only'.)

To select a Campaign, click on the **Campaign** button. The *Personnel Conference Find List* appears.

Figure 5-8 Personnel Reports Campaign Find Screen



Unit Name	Campaign Code
2005: TS - Germany Conference	TS051CNGRSS08
2005: GO - January Conference	GO051CNGRSS12
2004: ZA - Experiencing God (Sports Ministry)	ZA042SPORTS72
2004: ZA - CTC & Tour 1 & 2	ZA041SUMMER23
2004: ZA - CTC & Tour 1	ZA041SUMMER18
2004: ZA - Cape Town Challenge	ZA041SUMMER12
2004: UZ - English Program	UZ041ENGLIS17
2004: TS/GB - Teens in Mission LUKE	TS042GB.TIM13
2004: TS/DE - TIM Classical Music	TS042DE.MUS16

Select the Conference that you want, and click **OK**.

To select a Conference, click on the **Conference** button. A screen similar to the *Campaign Find* screen appears, but only listing Conferences.

To select an Extract, click on the **Extract** button. This allows you choose an existing extract.

Application Status use the check boxes to select which statuses of application you wish to include in the report.

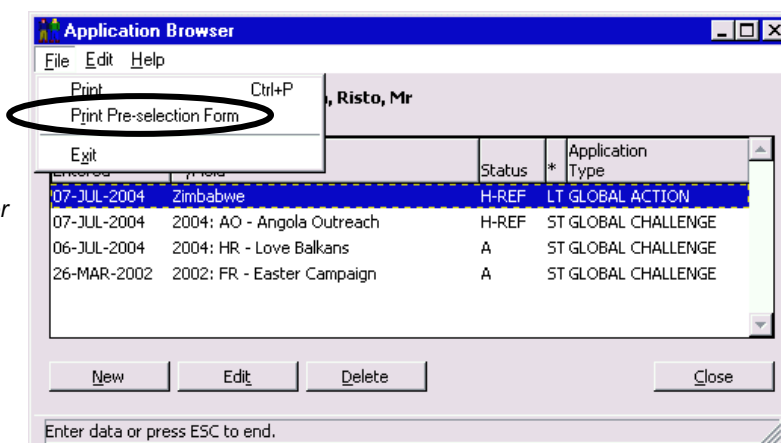
5. The *Start Print Job Screen* appears. Select the print destination and click **OK**.

5.4 Pre-selection form

The pre-selection form differs from the other Personnel Reports, since it normally relates to a single application from a single individual. It is therefore necessary to find and select the particular application required before printing the form. It is now available for both short-term and long-term applications. In future it may be possible to print the form with no application entered. To print a pre-selection form:

1. Open the *Application Browser Screen* as described for Figure 3-2 on page 38. Highlight the application of interest.
2. On the menu bar select File, then Print Pre-selection Form as shown in Figure 5-9.

Figure 5-9 Application Browser for a partner, showing Pre-selection Form menu item



Entered	Name	Status	Application Type
07-JUL-2004	Zimbabwe	H-REF	LT GLOBAL ACTION
07-JUL-2004	2004: AO - Angola Outreach	H-REF	ST GLOBAL CHALLENGE
06-JUL-2004	2004: HR - Love Balkans	A	ST GLOBAL CHALLENGE
26-MAR-2002	2002: FR - Easter Campaign	A	ST GLOBAL CHALLENGE

3. A form is printed giving the main items of information relating to the application, together with a number of other headings for items not entered in Petra. The form can be printed and then additional information added by hand. However, it may be better to print this to screen. It is then possible to select and copy this to the clipboard, and then paste it into a word-processor document, into which additional information can be typed before the form is sent to the Receiving Field.

5.5 General Personnel Reports

Almost all of the personnel data entry screens give access to producing a report on the corresponding information. There are two main types of general personnel reports:

- **Multiple Record reports** This type of report is normally produced from a 'list' type screen which shows a list of records. The report produced contains information on all the records shown in the 'list' screen.
- **Single Record reports** This type of report is normally produced from a 'maintenance' type screen which contains data entry fields. The report produced contains information on just the record shown in the 'maintenance' screen.

This concept of single and multiple records exist in many parts of the personnel module including: Unit Data (eg Jobs), the General Application Info Browser, Individual Data and Table Maintenance. Examples are given below, which are similar to producing all other reports from within the personnel module.

5.5.1 Multiple Record Reports

The following is an example of a report containing multiple records:

Example: We wish to print out all the jobs recorded for one unit.

1. From the menu bar at the top of the *Unit Maintenance Screen* for the unit in question, select **Jobs**. This brings up the *Unit Jobs List Screen*.

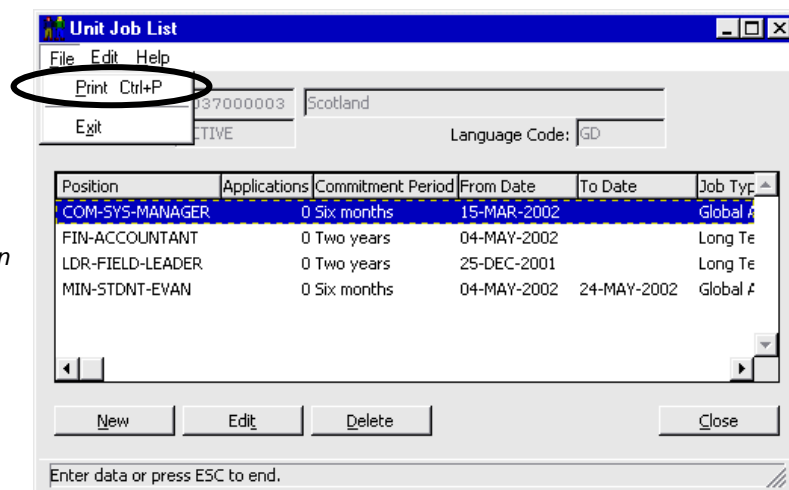


Figure 5-10 Unit Jobs List Screen, showing Print option on File menu

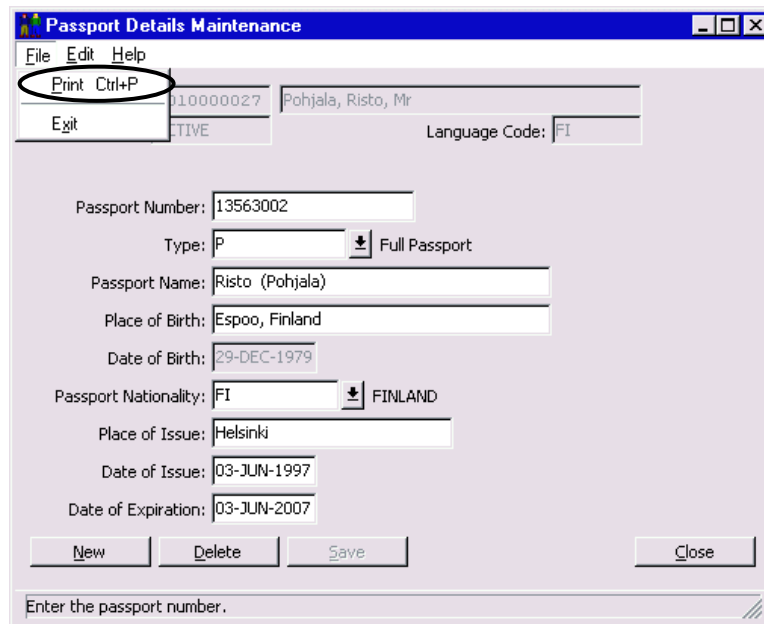
2. From the menu bar at the top of the *Unit Jobs List Screen* select **File** then **Print**. This brings up the *Start Print Job Screen*. Print in the normal way. The report printed will include the information in all the records in the list.

5.5.2 Single Record Reports

The following is an example of a report containing a single record:

Example: You wish to print out details of a passport for Risto Pohjala.

1. Open the *Passport Details Maintenance Screen* for Risto Pohjala, as described in section 2.2.3 on page 17. The screen appears, as shown in Figure 5-11.



Passport Details Maintenance

File Edit Help

Print Ctrl+P

Exit

010000027 Pohjala, Risto, Mr

ACTIVE Language Code: FI

Passport Number: 13563002

Type: P Full Passport

Passport Name: Risto (Pohjala)

Place of Birth: Espoo, Finland

Date of Birth: 29-DEC-1979

Passport Nationality: FI FINLAND

Place of Issue: Helsinki

Date of Issue: 03-JUN-1997

Date of Expiration: 03-JUN-2007

New Delete Save Close

Enter the passport number.

Figure 5-11 Passport Data Screen, showing Print option on File menu

2. From the File menu, select Print. A *Start Print Job Screen* appears, and the data on the screen will be printed in the normal way. This is possible from many screens within PETRA.

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

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Chapter 6 Maintaining Personnel Tables

When you enter data in PETRA, you often need to select an item from a list of possible choices. Each set of possible choices is stored in a list or "Table". Many tables are simply lists of short codes and their meanings, but some include more detailed information.

The PETRA Personnel System uses two groups of Tables:

- **Applications Tables** holds lists of choices relating to events and applications.
- **General Tables** hold lists of choices relating to the personnel data screens

When PETRA is installed, the tables contain a standard set of choices for each list. You cannot edit or delete these choices but you can stop any of these choices from appearing on PETRA menu lists by marking them as 'Unassignable'. You can add additional choices to the tables according to specific office needs. Only users who belong to the Group PERS-ADMIN can maintain personnel tables.

Section 6.1 below describes the general principle for maintaining all Tables. Sections 6.2 and 6.3 explain how to edit the details in each table for Applications and General Tables, respectively. All the Personnel Tables, and the relevant page numbers are listed below and on the next page.

Table	Contents	Page
Application Tables		
Application Types	The sort of event/service the application is for, in particular long/short-term	Pg. 83
Application Forms	The types of forms used for applications, seeking references, etc.	Pg. 81
Application Status	The status of an application (accepted, on-hold, cancelled, etc)	Pg. 82
Country/Event Preference Levels	Choices indicate how strongly an applicant wishes to go to particular receiving field.	Pg. 84
Leadership Rating	The sorts of the group that a person might be suitable to lead.	Pg. 85
Local Application Data	Any number of data fields that can be defined for use by the local office.	Pg. 86
OM contact	How the person heard about OM (eg friend, brochure, web-site, etc)	Pg. 86
Party Type	Whether an applicant is with a group for travel, whole event, etc.	Pg. 86
Event Role	The main role a person has at an event (speaker, OMer, counsellor, etc)	Pg. 85
Transport Types	Means of travel to/from an event (bus, railway, car, etc.)	Pg. 87
Arrival/Departure Points	Main arrival/departure points for events (airport, train station, etc.)	Pg. 84
General Tables		
Ability Area	Different skills relevant to the work of a team (almost every skill)	Pg. 88
Ability Levels	Level of competence in a particular skill or ability	Pg. 88
Professional Areas	Recognised professions	Pg. 93
Qualification Levels	Level of training/qualification, (eg university degree, doctorate, diploma, etc)	Pg. 93
Vision Areas	Areas of service	Pg. 94
Vision Levels	Degree of interest in an area of service	Pg. 94
Driver Status	Status as a driver on an event (eg OM driver, driver to be tested, etc)	Pg. 89
Positions	Positions (jobs) to be done within a team or field	Pg. 92
Job Assignment Types	Types of assignment to a job (full-time, part-time, visiting speaker, etc)	Pg. 88
Leaving Codes	Reasons for leaving an assignment	Pg. 91
Languages	Languages spoken by a person	Pg. 90
Language Levels	Level or ability in a language	Pg. 90
Local Personnel Data	Any number of data fields that can be defined for use by the local office.	Pg. 92
Passport Types	Types of passport (full, temporary, ID card, etc)	Pg. 92
Valuable Items	Items that may need to be recorded for insurance, police purposes	Pg. 93

Figure 6-1 List of Personnel Tables

6.1 Main Steps for Table Maintenance

There are three main steps in maintaining a Table. It is easiest to understand these if we look at an example.

Example: To add a Passport Type.

Step 1 - Find the table that you wish to change:

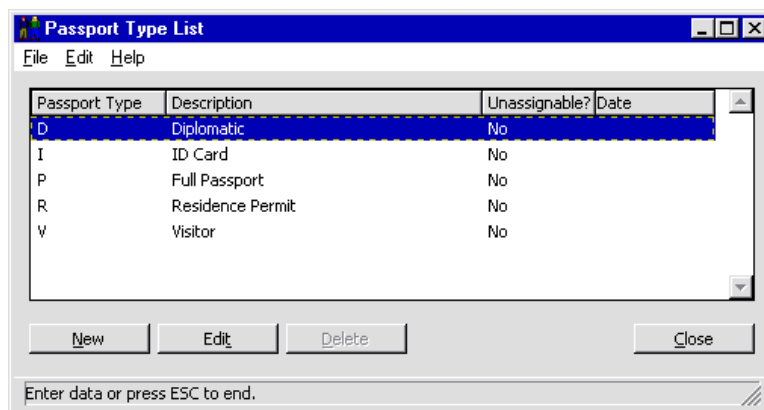
To find the appropriate table, click on **Maintain Tables** and then either the **Applications Tables**, **Event Tables** or **General Tables** menus at the top of the *Main Personnel Screen*. When you click on one of these you see a drop-down menu which allows you to choose the particular table that you wish to maintain. Figure 6-2 shows the **General Tables** drop-down menu.

Figure 6-2 Personnel Screen with General Tables menu open, showing Passport Type.



When you have selected the Table that you wish to change, you see a list of the possible choices for that particular data item. As an example, Figure 6-3 shows the Passport Type List Table (for maintaining or adding a passport type).

Figure 6-3 Passport Type List Screen



Step 2 - Select the Table Option:

You can now view the existing data in the list using the scroll bars. You can then use the buttons at the bottom of the screen either (i) to add a new item to the list, or (ii) to select an existing item to edit it, or (iii) to select an existing item on the list and delete it. You will not be able to delete an item if it is a standard system code or if it has been used already on your system. This List Screen looks similar for all Tables (although of course the content differs.)

Step 3 - Enter or Change the Data:

If you choose to add a new item, or edit an existing one, you are taken to an 'edit' screen which allows you to enter (or change) the details about that item. These screens are different for each Table, and are shown in the appropriate section below. As an example, if you wish to enter a new type of passport, Temporary, click **New** on the screen shown in Figure 6-3. The *Passport Type Maintenance Screen* appears. You can now edit the data in the white fields. For our example we can see the Passport Type and Description. Be careful in choosing the code for the passport type; once it is used, it cannot be changed, although the description can be changed. If we click the **Unassignable** check box to show that this type may no longer be assigned, a date box opens allowing us to enter the date that the type became unassignable. Changes to lists take effect immediately after saving.

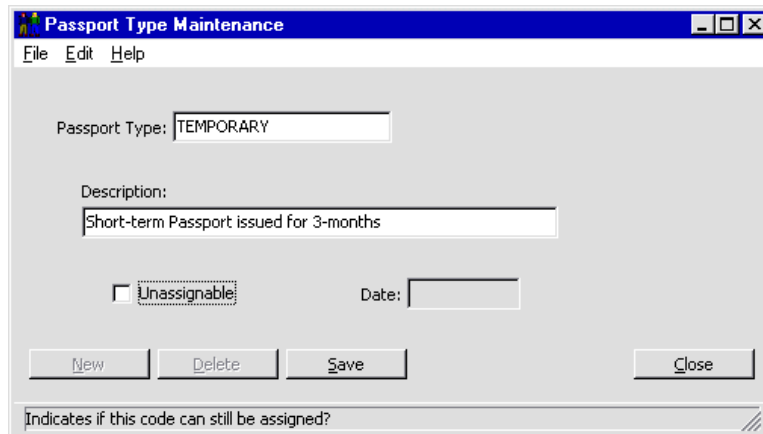

 A screenshot of the 'Passport Type Maintenance' window. The title bar says 'Passport Type Maintenance'. Below the title bar is a menu bar with 'File', 'Edit', and 'Help'. The main area contains a 'Passport Type:' label followed by a text box containing 'TEMPORARY'. Below that is a 'Description:' label followed by a text box containing 'Short-term Passport issued for 3-months'. There is an 'Unassignable' checkbox which is currently unchecked, and a 'Date:' label followed by an empty text box. At the bottom are four buttons: 'New', 'Delete', 'Save', and 'Close'. A status bar at the very bottom says 'Indicates if this code can still be assigned?'.

Figure 6-4 *Passport Type Maintenance Screen*

6.2 Application Tables

Applications Tables can be accessed from the main *Personnel Screen*. Select the appropriate individual table from the pull-down menu at the top of the screen.

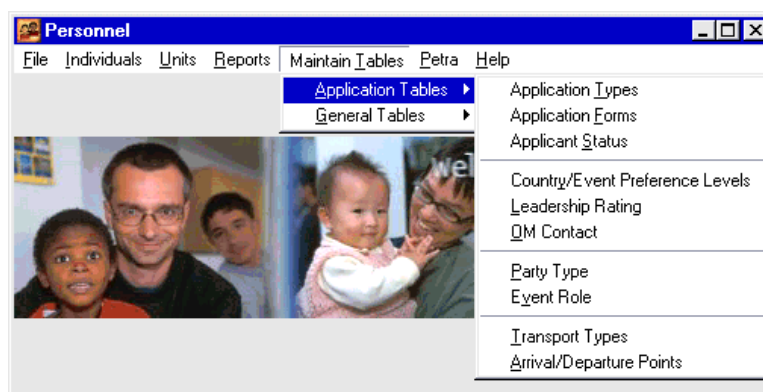

 A screenshot of the 'Personnel' window. The title bar says 'Personnel'. Below the title bar is a menu bar with 'File', 'Individuals', 'Units', 'Reports', 'Maintain Tables', 'Petra', and 'Help'. The 'Maintain Tables' menu is open, showing a sub-menu with 'Application Tables' and 'General Tables'. The 'Application Tables' sub-menu is further open, showing a list of tables: 'Application Types', 'Application Forms', 'Applicant Status', 'Country/Event Preference Levels', 'Leadership Rating', 'QM Contact', 'Party Type', 'Event Role', 'Transport Types', and 'Arrival/Departure Points'. The main area of the window shows a photograph of a family (a man, a woman, and two children).

Figure 6-5 *Personnel Screen, showing Applications Tables menu*

The Applications Tables sub-menu allows the tables listed to be maintained. These are described individually below (in alphabetical order).

6.2.1 Application Forms Table

The Application Forms Table controls the list of forms that appear on the Forms Tab of Long-term and Short-term applications (see Figure 3-10 on page 43). With some forms it is important to record that they have been received (eg an application); with others it is important to record that they have been sent (eg an acceptance letter). N/A means Not Applicable. To add or amend Application Form details:

1. From the *Personnel Screen* menu, select **Maintain Tables**, **Application Tables**, then **Application Forms**. The *App Form Types List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.

- To add a new Application Form, click **New**. To edit an existing Application Form, highlight it from the list and click the **Edit** button. The *Application Form Types Maintenance Screen* appears.

Figure 6-6 App Form Types Maintenance Screen



The screenshot shows the 'Application Form Maintenance' window. It has a menu bar with 'File', 'Edit', and 'Help'. The main area contains a 'Form Name' field with 'PASTOR REFERENCE' entered. Below it are two checked checkboxes: 'Received Form' and 'Sent Form'. Further down are four radio buttons: 'Long App.' (selected), 'Short App.', 'Both Apps.', and 'NONE'. At the bottom are four buttons: 'New', 'Delete', 'Save', and 'Close'. A status bar at the very bottom asks 'Is this a form that is received from an applicant?'.

- Enter or change data in the various fields as required:

Form Name The name of the application form. (This cannot be changed if the form is from the standard set of choices).

Received Form Check the box if you will want to record the date this form is received from an applicant.

Sent Form Check the box if you will want to record the date that the form is sent to an applicant.

Long App. / Short App. / Both Apps. / None Select whether this form should be viewed for short-term applications, long-term applications or both. None is used when a form is no longer used.

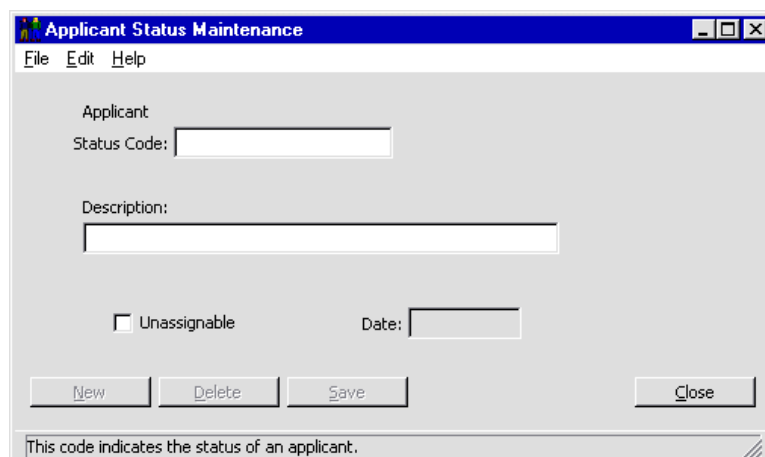
- Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.2.2 Applicant Status Table

The standard set of options should be adequate. However, to add or amend Applicant Status details:

- From the *Personnel Screen* menu, select **Maintain Tables, Application Tables**, then **Applicant Status**. The *Applicant Status List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
- To add a new Applicant Status, click the **New** button. To edit an existing Applicant Status, highlight it from the list and click the **Edit** button. The *Applicant Status Maintenance Screen* appears.

Figure 6-7 Applicant Status Maintenance Screen



The screenshot shows the 'Applicant Status Maintenance' window. It has a menu bar with 'File', 'Edit', and 'Help'. The main area contains an 'Applicant' label above a 'Status Code' field. Below that is a 'Description' label above a larger text field. Further down is an unchecked checkbox labeled 'Unassignable' and a 'Date' field. At the bottom are four buttons: 'New', 'Delete', 'Save', and 'Close'. A status bar at the very bottom says 'This code indicates the status of an applicant.'

3. Enter or change data in the various fields as required:

Applicant Status Code The short code for the Applicant Status.

Description Textual description for the Applicant Status .

Unassignable If you no longer want this option to be useable within PETRA, check this box.
You can then enter a **Date** in the box to show when this option was made unassignable

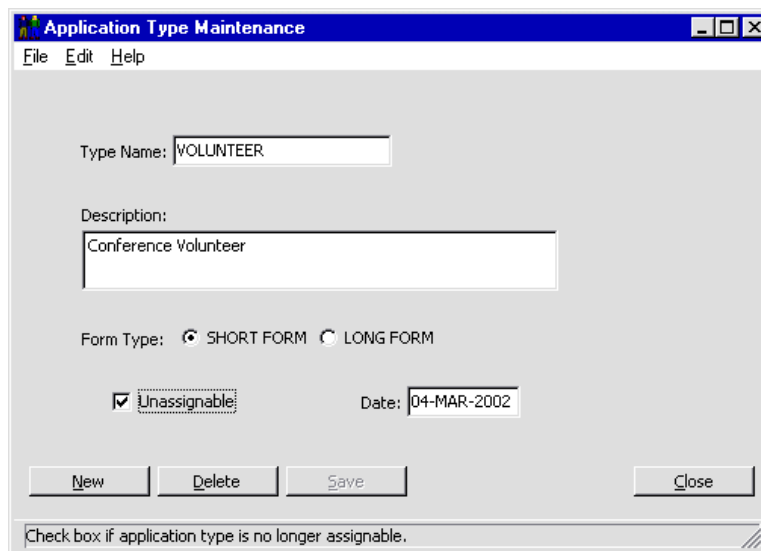
4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.2.3 Application Types Table

To add or amend Application Types details:

1. From the *Personnel Screen* menu, select *Maintain Tables, Application Tables*, then *Application Types*. The *Application Type List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Application Type, click the **New** button. To edit an existing Application Type, highlight it from the list and click the **Edit** button. The *Application Type Maintenance Screen* appears.

Figure 6-8 Application Type Maintenance Screen



3. Enter or change data in the various fields as required:

Type Name The name of the Application Type.

Description Textual description for the Application Type.

Long Form Type Click this button if this Application type should only be available for selection on Long Term Applications.

Short Form Type Click this button if this Application type should only be available for selection on Short Term Applications.

Unassignable If you no longer want this option to be useable within PETRA, check this box.
You can then enter a **Date** in the box to show when this option was made unassignable

4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.2.4 Arrival/Departure Points Table

These are the main travel termini (eg airports or train stations) to which people will travel before joining a conference or campaign. There is a standard format for these codes, since many offices may use them. New codes can be added for local needs, but it may be well to check with the Petra Development Team before doing this. Examples of codes using the standard format are as follows:

DE-A-FRA	Germany - Airport - Frankfurt
NL-T-ZWL	Netherlands -Train Station - Zwolle
GB-T-LONW	Britain - Train Station - London Waterloo

The first part is the standard country code (see Country Codes in Partner Tables). The second describes the type: (A-airport; B-bus station; T-train station;) The final part is a code for the actual point. If it is an airport, then the standard IATA airport code is used. If a train or bus station, these should describe the town (eg LON for London) and the name of the station (W for Waterloo).

To add or amend Arrival/Departure Point details:

1. From the *Personnel Screen* menu, select *Maintain Tables, Application Tables*, then *Arrival/Departure Point*. The *Arrival/Departure Point List Screen* appears, which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Arrival/Departure Point, click the **New** button. To edit an existing Arrival/Departure Point, highlight it from the list and click the **Edit** button. The *Arrival/Departure Point Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Arrival Point Code The short code for the Arrival Point .

Description Textual description for the Arrival Point.

Unassignable If you no longer want this option to be useable within PETRA, check this box.
You can then enter a **Date** in the box to show when this option was made unassignable

4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.2.5 Country/Event Preference Level Table

To add or amend Country/Event Preference Level details:

1. From the *Personnel Screen* menu, select *Maintain Tables, Application Tables*, then *Country/Target Preference Level*. The *Country/Event Preference Level List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Country/Event Preference Level, click the **New** button. To edit an existing Country/Event Preference Level, highlight it from the list and click the **Edit** button. The *Country/Event Preference Level Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Preference Level This is the numerical preference level (0 no preference, 2 high preference.)

Description Textual description for the Country/target Preference Level.

Unassignable If you no longer want this option to be useable within PETRA, check this box.
You can then enter a **Date** in the box to show when this option was made unassignable

4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.2.6 Event Role Table

Event Roles (previously called campaign codes) describe why someone is participating in a campaign or conference. In addition to Normal Applicants, people may be there as speakers, drivers, etc. To add or amend Event Role details:

1. From the *Personnel Screen* menu, select *Maintain Tables*, *Application Tables*, then *Event Role*. The *Event Role List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Event Role, click the **New** button. To edit an existing Event Role, highlight it from the list and click the **Edit** button. The *Event Role Maintenance Screen* appears.

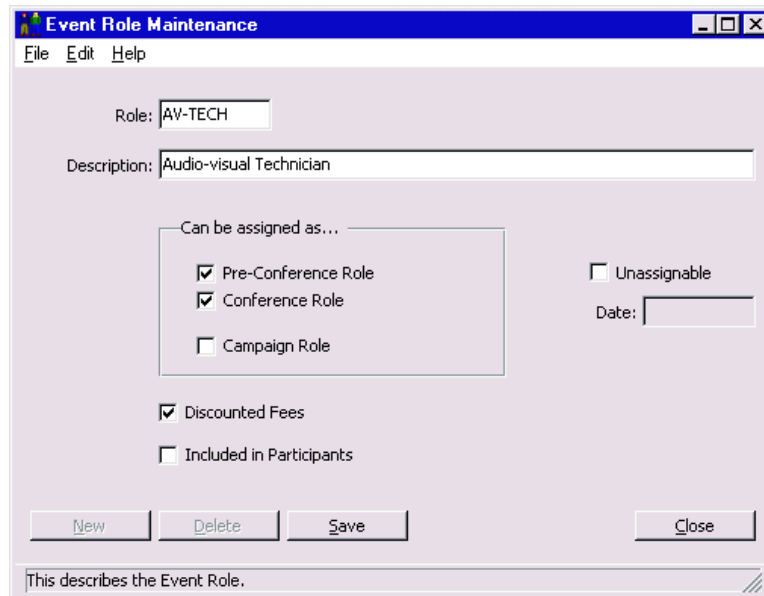


Figure 6-9 Event Role Maintenance Screen

3. Enter or change data in the various fields as required:
 - Role** The short code for the Event Role.
 - Description** Textual description for the Event Role.
 - Pre-Conference Role, Conference Role and Campaign Role** Check the boxes to show for which of the three different situations this role should be available.
 - Discounted Fees** Check this box if discounted fees should apply to someone taking on this role. This setting affects the calculation in the Conference Management Module.
 - Included in Participants** If this report is checked, then people with this role will be included in reports of Participants (participants are normal applicants, not leaders, exhibitors, etc.)
 - Unassignable** If you no longer want this option to be useable within PETRA, check this box. You can then enter a **Date** in the box to show when this option was made unassignable
4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.2.7 Leadership Rating Table

To add or amend Leadership Rating details:

1. From the *Personnel Screen* menu, select *Maintain Tables*, *Application Tables*, then *Leadership Rating*. The *Leadership Rating List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.

2. To add a new Leadership Rating, click the **New** button. To edit an existing Leadership Rating, highlight it from the list and click the **Edit** button. The *Leadership Rating Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Leadership Rating The short code for the Leadership Rating.

Description Textual description for the Leadership Rating.

Unassignable If you no longer want this option to be useable within PETRA, check this box.

You can then enter a **Date** in the box to show when this option was made unassignable

4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.2.8 Local Application Data Table

Local Application Data is used by an office to record data related to a specific application which is only relevant to that office. The local office can set up any number of special data fields to record this. This data is not exported when a partner is exported. PETRA contains two other similar types of locally-defined data: **Local Personnel Data**, which is used for general Personnel information, and **Local Partner Data**, which stores more general information about partners (not personnel data).

Local Application Data is set up from the *Personnel Screen* menu, by selecting Maintain Tables, Application Tables, then Local Application Data.

The procedure to follow is very similar to that for Local Partner Data, as described for the Partner module, so it is suggested that users refer to this (look for “local partner data, set up labels” in the index of the PARTNER USER GUIDE – at the time of writing it was section 3.6 on page 92.) The only difference is that Local Application Data only refers to partners of class Person, so there is no need to select the partner class.

6.2.9 OM Contact Table

OM Contact refers to the way that a person heard about the Organisation. Do not confuse it with contacts with partners, as entered in the Partner System. To add or amend OM Contact details:

1. From the *Personnel Screen* menu, select Maintain Tables, Application Tables, then OM Contact. The *OM Contact List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new OM Contact, click the **New** button. To edit an existing OM Contact, highlight it from the list and click the **Edit** button. The *OM Contact Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Contact Name The name for the type of OM Contact.

Description Textual description for the OM Contact.

Unassignable If you no longer want this option to be useable within PETRA, check this box.

You can then enter a **Date** in the box to show when this option was made unassignable

4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.2.10 Party Type Table

Party Type indicates the options where a group are participating together. To add or amend Party Type details:

1. From the *Personnel Screen* menu, select *Maintain Tables*, *Application Tables*, then *Party Type*. The *Party Type List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Party Type, click the **New** button. To edit an existing Party Type, highlight it from the list and click the **Edit** button. The *Party Type Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Party Type Code The short code for the Party Type.

Description Textual description for the Party Type.

Unassignable If you no longer want this option to be useable within PETRA, check this box. You can then enter a **Date** in the box to show when this option was made unassignable
4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.2.11 Travel Types Table

To add or amend Travel Type details:

1. From the *Personnel Screen* menu, select *Maintain Tables*, *Application Tables*, then *Travel Type*. The *Travel Type List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Travel Type, click the **New** button. To edit an existing Travel Type, highlight it from the list and click the **Edit** button. The *Travel Type Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Travel Type The name for the Travel Type.

Description Textual description for the Travel Type.

Unassignable If you no longer want this option to be useable within PETRA, check this box. You can then enter a **Date** in the box to show when this option was made unassignable
4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.3 General Tables

General Tables can be accessed from the main *Personnel Screen*. Select the appropriate individual table from the pull-down menu at the top of the screen.

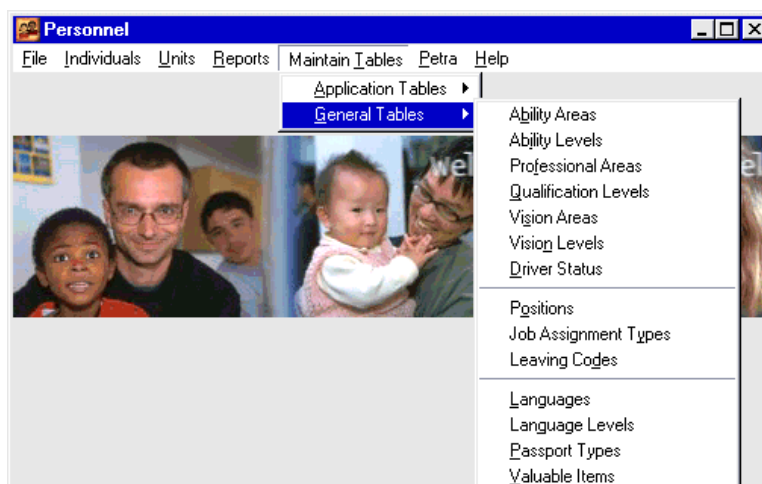


Figure 6-10 Personnel Screen, showing General Tables menu

The Applications Tables sub-menu allows the tables shown to be maintained. These are described individually below (in alphabetical order).

6.3.1 Ability Areas Table

Abilities, or Ability Areas, are used both for individuals, listing their skills, and for Units and Job positions, listing what is needed. To add or amend Ability Area details:

1. From the *Personnel Screen* menu, select *Maintain Tables, General Tables*, then *Ability Areas*. The *Ability Area List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Ability Area, click the **New** button. To edit an existing Ability Area, highlight it from the list and click the **Edit** button. The *Ability Area Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Ability Area The name given to the Ability Area.

Description Textual description for the Ability Area.

Unassignable If you no longer want this option to be useable within PETRA, check this box.
You can then enter a **Date** in the box to show when this option was made unassignable

4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.3.2 Ability Levels Table

To add or amend Ability Level details:

1. From the *Personnel Screen* menu, select *Maintain Tables, General Tables*, then *Ability Levels*. The *Ability Level List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Ability Level, click the **New** button. To edit an existing Ability Level, highlight it from the list and click the **Edit** button. The *Ability Level Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Ability Level The numerical Ability Level.

Description Textual description for the Ability Level.

Unassignable If you no longer want this option to be useable within PETRA, check this box.
You can then enter a **Date** in the box to show when this option was made unassignable

4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.3.3 Job Assignment Types Table

To add or amend Job Assignment Type details:

1. From the *Personnel Screen* menu, select *Maintain Tables, General Tables*, then *Job Assignment Types*. The *Job Assignment Type List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Job Assignment Type, click the **New** button. To edit an existing Job Assignment Type, highlight it from the list and click the **Edit** button. The *Job Assignment Type Maintenance*

Screen appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.

3. Enter or change data in the various fields as required:

Job Assignment Code The short code for the **Job Assignment Type**.

Description Textual description for the **Job Assignment Type**.

Unassignable If you no longer want this option to be useable within PETRA, check this box.
You can then enter a **Date** in the box to show when this option was made unassignable

4. Click , then (or to enter another option). Click again.

6.3.4 Driver Status Table

Normally the driver status should not be changed. However, you may need to add an entry for local requirements. To add or amend Driver Status details:

1. From the *Personnel Screen* menu, select *Maintain Tables, General Tables*, then *Driver Status*. The *Driver Status List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Driver Status, click the button. To edit an existing Driver Status, highlight it from the list and click the button. The *Driver Status Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Driver Status The short code for the Driver Status.

Description Textual description for the Driver Status.

Unassignable If you no longer want this option to be useable within PETRA, check this box.
You can then enter a **Date** in the box to show when this option was made unassignable

4. Click , then (or to enter another option). Click again.

6.3.5 Document Type and Document Type Category Tables

These two tables work together. It is possible to record details of personal documents, such as visas, health insurance, for a person. Since there are many possible **Document Types**, these are grouped into **Document Type Categories**, so, for example, we may have an Document Type Category INSURANCE and within this category we may have Document Types TRAVEL INS., HEATH INS., CAR INS., etc. Categories should be set up before individual Document Types because when you set up an Document Type, you must assign it to an existing Category.

Document Type Category Table

To enter a document type category:

1. From the *Personnel Screen* menu, select *Maintain Tables, General Tables*, then *Document Type Category*. The *Document Type Category List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Document Type Category, click the button. To edit an existing one, highlight it from the list and click the button. The *Document Type Category Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Document Type Category The short code for the Document Type Category. Choose this carefully, because it cannot be changed later.

Description A clear description of the document type.

4. **Unassignable** If you no longer want this option to be useable within PETRA, check this box. You can then enter a **Date** in the box to show when this option was made unassignable
5. Click , then (or to enter another option). Click again.

Document Type Table

To add or amend a document type:

1. From the *Personnel Screen* menu, select *Maintain Tables*, *General Tables*, then *Document Types*. The *Personal Document List Screen* appears, which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Personal Document type, click the button. To edit an existing one, highlight it from the list and click the button. The *Document Type Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Document Type The short code for the Document Type. Choose this carefully, because it cannot be changed later.

Description A clear description of the document type.

Category Select the category to which this document type belongs.

Unassignable If you no longer want this option to be useable within PETRA, check this box. You can then enter a **Date** in the box to show when this option was made unassignable

4. Click , then (or to enter another option). Click again.

6.3.6 Languages Table

To add or amend Language details:

1. From the *Personnel Screen* menu, select *Maintain Tables*, *General Tables*, then *Language*. The *Language List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Language, click the button. To edit an existing Language, highlight it from the list and click the button. The *Language Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Language Code The short code for the Language.

Description Textual description for the Language.

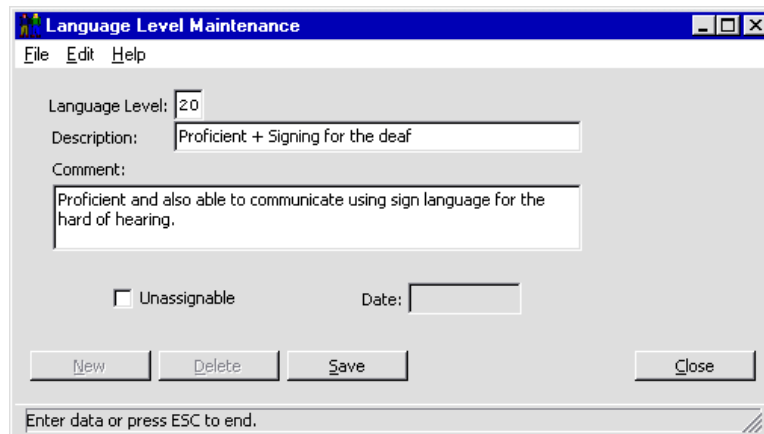
4. Click , then (or to enter another option). Click again.

6.3.7 Language Level Table

The language levels cannot be altered. However, it is possible to add additional requirements if required. To add or amend Language Level details:

1. From the *Personnel Screen* menu, select *Maintain Tables*, *General Tables*, then *Language Level*. The *Language Level List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Language Level, click the **New** button. To edit an existing Language Level, highlight it from the list and click the **Edit** button. The *Language Level Maintenance Screen* appears.

Figure 6-11 Language Level Maintenance Screen



3. Enter or change data in the various fields as required:
 - Language Level** The numerical Language Level.
 - Description** Textual description for the Language Level.
 - Comment** Enter this box the text you want to appear in an "information screen" when the Level Comment button is pressed in the *Personal Language Maintenance Screen* (Figure 2-11, page 23) or the *Unit Language Maintenance Screen* (Figure 4-19, page 65).
 - Unassignable** If you no longer want this option to be useable within PETRA, check this box. You can then enter a **Date** in the box to show when this option was made unassignable
4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.3.8 Leaving Codes Table

To add or amend Leaving Code details:

1. From the *Personnel Screen* menu, select *Maintain Tables*, *General Tables*, then *Leaving Code*. The *Leaving Code List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Leaving Code, click the **New** button. To edit an existing Leaving Code, highlight it from the list and click the **Edit** button. The *Leaving Code Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:
 - Leaving Code** The short code given to the Leaving Code.
 - Description** Textual description for the Leaving Code.
 - Unassignable** If you no longer want this option to be useable within PETRA, check this box. You can then enter a **Date** in the box to show when this option was made unassignable
4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.3.9 Local Personnel Data Table

Local Personnel Data is used by an office to record general (non-application) personnel data which is only relevant to that office. The local office can set up any number of special data fields to record this. This data is not exported when a partner is exported. PETRA contains two other similar types of locally-defined data: **Local Application Data**, which relates to specific applications, and **Local Partner Data**, which stores more general information about partners (not personnel data).

Local Personnel Data is set up from the *Personnel Screen* menu, by selecting *Maintain Tables*, *General Tables*, then *Local Personnel Data*.

The procedure to follow is very similar to that for Local Partner Data, as described for the Partner module, so it is suggested that users refer to this (look for Local Partner Data in the index of the PARTNER USER GUIDE – at the time of writing it was section 3.6 on page 92.) The only difference is that Local Personnel Data only refers to partners of class Person, so there is no need to select the partner class.

Note Local Personnel Data replaces the user-definable fields that previously existed in Office Specific Data and Personal Data.

6.3.10 Passport Type Table

To add or amend Passport Type details:

1. From the *Personnel Screen* menu, select *Maintain Tables*, *General Tables*, then *Passport Type*. The *Passport Type List Screen* appears as shown in Figure 6-3, page 80.
2. To add a new Passport Type, click the **New** button. To edit an existing Passport Type, highlight it from the list and click the **Edit** button. The *Passport Type Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Passport Type The short code given to the Passport Type (this cannot be changed if the form is from the standard set of choices).

Description Textual description for the Passport Type (this cannot be changed if the form is from the standard set of choices).

Unassignable If you no longer want this option to be useable within PETRA, check this box. You can then enter a **Date** in the box to show when this option was made unassignable

4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.3.11 Positions (Jobs and Roles) Table

This table lists the positions that a member can have in a team or office. These are known as jobs or roles in a unit. Some of the possible roles are important to the Caleb system, since they define rights to access certain parts of Caleb.

To add or amend Job Position details:

1. From the *Personnel Screen* menu, select *Maintain Tables*, *General Tables*, then *Positions*. *Position List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Position, click the **New** button. To edit an existing Position, highlight it from the list and click the **Edit** button. The *Position Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Position The name given to the Position.

Description Textual description for the Position.

Unassignable If you no longer want this option to be useable within PETRA, check this box.
You can then enter a **Date** in the box to show when this option was made unassignable

4. Click , then (or to enter another option). Click again.

6.3.12 Professional Area Table

To add or amend Professional Area details:

1. From the *Personnel Screen* menu, select *Maintain Tables*, *General Tables*, then *Professional Area*. The *Professional Area List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Professional Area, click the button. To edit an existing Professional Area, highlight it from the list and click the button. The *Professional Area Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Professional Area The name given to the Professional Area.

Description Textual description for the Professional Area.

Unassignable If you no longer want this option to be useable within PETRA, check this box.
You can then enter a **Date** in the box to show when this option was made unassignable

4. Click , then (or to enter another option). Click again.

6.3.13 Qualification Level Table

To add or amend Qualification Level details:

1. From the *Personnel Screen* menu, select *Maintain Tables*, *General Tables*, then *Qualification Level*. The *Qualification Level List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Qualification Level, click the button. To edit an existing Qualification Level, highlight it from the list and click the button. The *Qualification Level Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:

Qualification Level The numerical value for Qualification Level.

Description Textual description for the Qualification Level.

Unassignable If you no longer want this option to be useable within PETRA, check this box.
You can then enter a **Date** in the box to show when this option was made unassignable

4. Click , then (or to enter another option). Click again.

6.3.14 Valuable Item Table

To add or amend Valuable Item details:

1. From the *Personnel Screen* menu, select *Maintain Tables*, *General Tables*, then *Valuable Item*. The *Valuable Item Name List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.

2. To add a new Valuable Item, click the **New** button. To edit an existing Valuable Item, highlight it from the list and click the **Edit** button. The *Valuable Item name Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:
 - Valuable Item** The name given to the Valuable Item.
 - Description** Textual description for the Valuable Item.
 - Unassignable** If you no longer want this option to be useable within PETRA, check this box. You can then enter a **Date** in the box to show when this option was made unassignable
4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.3.15 Vision Area Table

To add or amend Vision Area details:

1. From the *Personnel Screen* menu, select *Maintain Tables, General Tables*, then *Vision Area*. The *Vision Area List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Vision Area, click the **New** button. To edit an existing Vision Area, highlight it from the list and click the **Edit** button. The *Vision Area Maintenance Screen* appears. This screen is similar to the *Passport Type Maintenance Screen* in Figure 6-4, page 81.
3. Enter or change data in the various fields as required:
 - Vision Area** The name given to the Vision Area.
 - Description** Textual description for the Vision Area.
 - Unassignable** If you no longer want this option to be useable within PETRA, check this box. You can then enter a **Date** in the box to show when this option was made unassignable
4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

6.3.16 Vision Level Table

To add or amend Vision Level details:

1. From the *Personnel Screen* menu, select *Maintain Tables, General Tables*, then *Vision Level*. The *Vision Level List Screen* appears which looks similar to the *Passport Type List Screen* in Figure 6-3, page 80.
2. To add a new Vision Level, click the **New** button. To edit an existing Vision Level, highlight it from the list and click the **Edit** button. The *Vision Level Maintenance Screen* appears. This screen is similar to the *Applicant Status Maintenance Screen* in Figure 6-7, page 82.
3. Enter or change data in the various fields as required:
 - Vision Level** The numerical value for Vision Level.
 - Description** Textual description for the Vision Level.
 - Unassignable** If you no longer want this option to be useable within PETRA, check this box. You can then enter a **Date** in the box to show when this option was made unassignable
4. Click **Save**, then **Close** (or **New** to enter another option). Click **Close** again.

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

Chapter 7 Event (Conference/Campaign) Maintenance

PETRA has some administrative functions for updating and copying special campaign information. Some of these are actually Partner module functions, but a reference is included here for convenience. The subjects referred to in this chapter are:

- Exporting campaign participants so that they can be imported by other PETRA installations.
- Loading a list of campaigns distributed from the central office, and creating a new local campaign.
- Preparing campaign information for archive purposes. This includes deactivating old campaigns, and automatically recording participation on individuals' personnel records.)

7.1 Exporting Application Data

As an office receives and processes applications for short term events such as Easter and Summer Campaigns there is a need to regularly send this information to the central administration office for the campaign. For most applications this is done by exporting the partners and sending the file to the conference/campaign organiser for loading into their PETRA system.

IMPORTANT Sending Fields must check that all necessary information has been entered before exporting. This includes not just data entered in the Application screens, but also information which is entered through the partner module, such as gender (for accommodation purposes), etc.

Applications can be exported using the facilities in the Partner module (see the PARTNER USER GUIDE, Chapter 4 for more detail on exporting extracts or individual partners.) To export applications:

1. Create a conference extract or a campaign extract for the required conferences or campaigns, giving it an appropriate name.
2. Go to the *Extract List Screen*, highlight the extract that you have just created. From the menu bar, select **File**, then **Export Partners in Extract**.
3. A dialogue box asks if you wish to export Person records as well as Family records. Click **Yes**, since applications are Person data. A new box asks you to select a file location for the export file. Choose a suitable folder and click **OK**. The data is exported into this folder as a text file, which can then be sent to the registering office.

7.2 Entering New Campaigns and Conferences

Campaigns and conferences are partners of class Unit, and Unit Type Campaign or Conference. Most of them are created centrally but it is possible to create local events.

7.2.1 Loading Centrally-generated Events

The central administration team will create all 'global' events, and distribute a file to all offices. This is just a list of partners (class Unit, since this is the class for events) in the form of an extract. To enter these into a local PETRA system it is only necessary to import the extract of partners, as described in the PARTNER USER GUIDE under Importing Extracts.

7.2.2 Creating a Conference / Campaign for Local Use

In exceptional circumstances Campaign units can be created at a local office, and this is described now.

NOTE It is recommended that this operation should be done by an experienced user of PETRA and that the System Administrator for PETRA in the office should be informed.

1. To create a new Campaign Unit follow the instructions given in the PARTNER USER GUIDE for "Entering a New Partner", of class Unit, using the following information:

Partner Name The name used for the unit should start with a four digit year, a colon (:), a space and a description, for example "2001: CA Easter". The use of this standard format helps when sorting a long list alphabetically.

Addressee Type - select Campaign

Special Type Select the Special Type 'Campaign'. This is used when producing reports on Campaigns.

Location Type Select Field.

From date and To Date Enter the start and finish dates of the campaign.

Mailing Addr. Leave this box clear.

2. From the Maintain menu of the *Partner Edit Screen*, select *Detail* and enter the following:

Unit Type Select a conference or campaign Unit type. Unless one of the following campaign type codes is entered, PETRA cannot recognise this as being a conference or campaign, and so it will not appear on the list of possible conferences to be set-up on your system.

GC-CONG	Global Challenge Conference
GA-CONF	Global Action Conference
TS-CONG	Teen Street Conference

Country Code Use the same code as the address

Language Code The main language to be used

Acquisition Code Enter Mailroom (Load is used for codes set up centrally by the PETRA team.)

Campaign Code The code should have 13 characters. The explanation below describes the form of centrally-generated codes. If you are setting up a local code, make sure that it is different from any centrally-generated codes, but it is recommended to follow the same format. Codes take the following form (the purpose of the characters is described below):

LLYYNEEEEEEDD

LL	Location - normally the country code of the organising unit, but GA - Global Action conferences, TS -Teen Street, ZZ - Staff Conference
YY	Year - 2-digit year, so for 2003, YY is 03
N	Number - Sequence number of the event at this location in this year, so for the second event in a particular country in a year, use 2. If there are more than 10 events in a country, then you can use letters, A, B, C, etc.

EEEEEE	<p>Event description - For simple events use a description like EASTER .</p> <p>For a conference or congress use CNGRSS. For campaigns split into two groups of 3 characters as below.</p> <p>First group of characters EEE - these give the country code of campaign, followed by a full-stop (.), eg ES. (Spain), but KOS (Kosova) because it has no country code), and TPT (Turning point - to distinguish from LUKE)</p> <p>Second group of characters EEE - these give the evangelism type:</p> <p>URB (urban) RUR (rural) MUS (Muslim) JEW (Jews) ASI (Asian) CHL (children) EAS (East European) CHU (with local church) CHP (church planting) MIX (mixed)</p>
DD	<p>Days - The number or days the event will last. This affects the conference cost. For a campaign, this is the total number of days for conference + campaign.</p>

Example: The code below is for campaign in Greece in 2001. It follows a conference in Albania, which is the first Albanian campaign in that year. The campaign involves a mixture of activities, and will last for a total of 28 days, including the initial conference.

AL011GR.MIX28

PETRA Support Team: If units are to be used in other offices, these must be created by the PETRA support team using keys under the OM root (0001000000). Before creating the first unit, set p_partner_ledger record for this to have the starting key YY0000, where YY is the current year, so for 2001, use 010000). This requires a special patch.

7.3 Changing Status of Campaign Units (Active / Inactive)

Information about short-term campaigns that have a limited duration (for example, a summer outreach) can continue to be held on PETRA after the event has passed. This allows a user to view the information but without it appearing in many of the menu options, which would otherwise be confusing.

Past campaigns can therefore be set to 'Inactive' status (this is sometimes called 'retired'). Campaigns are a type of Unit, and can be set to inactive status manually within the Partner module. (See information on 'Retiring a Partner' in the PARTNER USER GUIDE). However, because a large number of campaigns require to be set to inactive status each year, there are two special functions which can be used to change the active status of all campaign units in a given year:

- **De-activate Campaign Units** Sets the status of all campaign units for a chosen year to the inactive status. (PETRA actually looks for digits 3 and 4 in the campaign code.)
- **Activate Campaign Units** Re-sets the status of all campaign units for a chosen year to the active status.

When a campaign is 'inactive' it will only appear in the 'Partner Find - Unit' lists if the All search option is selected. Furthermore, an inactive campaign will not appear when producing a Conference Report.

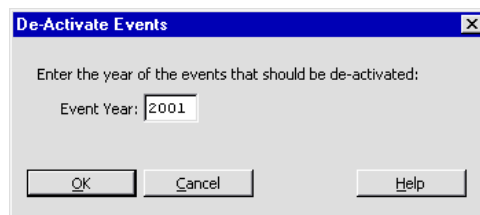
TIP The Activate and Deactivate functions can also be used when change the majority, but not all, of campaigns to the inactive status. *Example: In September, an office decides that it wants to change the status of 35 Easter and summer 2002 campaigns to 'in-active' as it prepares to enter campaign data for the 2003 campaigns. However, there are 3 remaining 2002 campaigns which need to be kept as 'active'. To do this use the De-activate Campaign Units function for the year 2002 and then change the status of the 3 remaining campaigns manually back to the 'active' status, using the Partner Module.*

7.3.1 De-activating Campaign Units

To change the status of all campaign units for a chosen year to 'in-active' follow the steps below:

1. From the menu bar at the top of the main *Personnel Screen* select **Units** then **De-Activate Campaign Units**. This brings up the *Events Activate / De-Activate Year Select Screen*.

Figure 7-1 Event Activate / De-Activate Year Select Screen



The dialog box titled "De-Activate Events" has a blue title bar with a close button (X). The main area is light gray and contains the text "Enter the year of the events that should be de-activated:". Below this is a text input field labeled "Event Year:" with the value "2001" entered. At the bottom, there are three buttons: "OK", "Cancel", and "Help".

2. In the **Event Year** box enter the year for which you want the Campaign or Conference events to be set to in-active status.
3. Click the **OK** button to complete the de-activation process.

7.3.2 Activating Campaign Units

To restore the status of all campaign units for a chosen year to 'active', the procedure is the almost the same as that described in section 7.3.1 for deactivating Campaign Units. However, to start it, from the *Personnel Screen*, select **Units**, and then **Activate Campaign Units**. Enter the Year for which you wish to reactivate campaigns and click **OK**.

7.4 Converting Campaigns into Previous Experience Records

A method is provided for taking the details of all campaigns and converting the information into Previous Experience records (see section 2.2.11, page 24.) for every campaign participant. This removes the need to create these records individually for every participant after they have completed a short-term campaign.

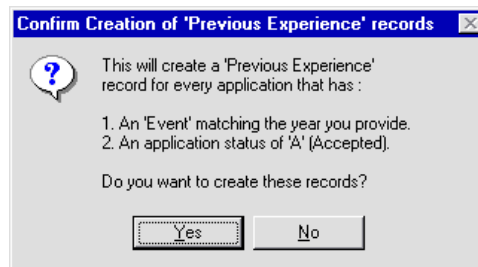
A method is also provided to reverse the conversion process in case it has been done by mistake.

7.4.1 Converting Campaigns to Previous Experience

To globally convert all campaign information into individuals' previous experience records follow the steps below:

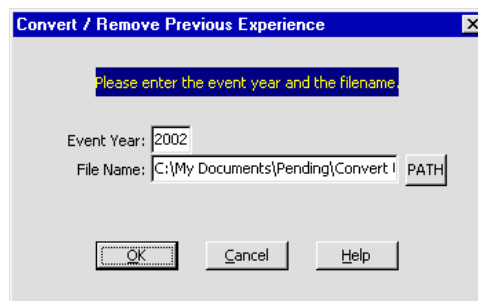
1. From the menu bar at the top of the main *Personnel Screen* select **Individuals** then **Previous Experience** then **Convert Campaign to Previous Experience**. This brings up the *Confirm Creation of 'Previous Experience' records Dialogue Box*.

Figure 7-2 Confirm Creation of 'Previous Experience' records Dialogue Box



2. As indicated in the dialogue box ensure that the two conditions are true for each campaign record you want converted to previous experience.
3. Click the **Yes** button to continue. The *Save Convert/Remove Report to...* file selection screen appears. This is just a file browse screen for your computer, showing all folders.
4. Select the location of the file where you want to make a copy of the converted data, and enter a file name (ending with .txt, since it will be a text file). Click the **OK** button. This will take you to the *Convert/Remove Previous Experience Screen*, with the pathname for the selected file shown in the box.

Figure 7-3 Convert to Previous Experience - select Year and File



5. Enter the year for which you wish to convert campaigns to previous experience. Click **OK**. A *Summary Report Screen* appears giving details of the Previous Experience records which have been created. Click on the **OK** button to complete the process.

7.4.2 Removing Campaigns from Previous Experience

If you wish to undo a conversion of Campaign information into Previous Experience records, the procedure to follow is very similar to that of making the conversion (section 7.4.1). Follow exactly the same procedure, except that on the Personnel Screen, select Individual, then Previous Experience, and then Remove Campaign Applications from Previous Experience. Once again you will be asked to name a text file where the results will be recorded to allow you to check them in case there is a problem.

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

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Chapter 8 Caleb Registration

The Caleb Registration Shepherd provides a simple way of ensuring that all relevant data has been entered for a partner before exporting from PETRA to Caleb. This is especially useful for new people.

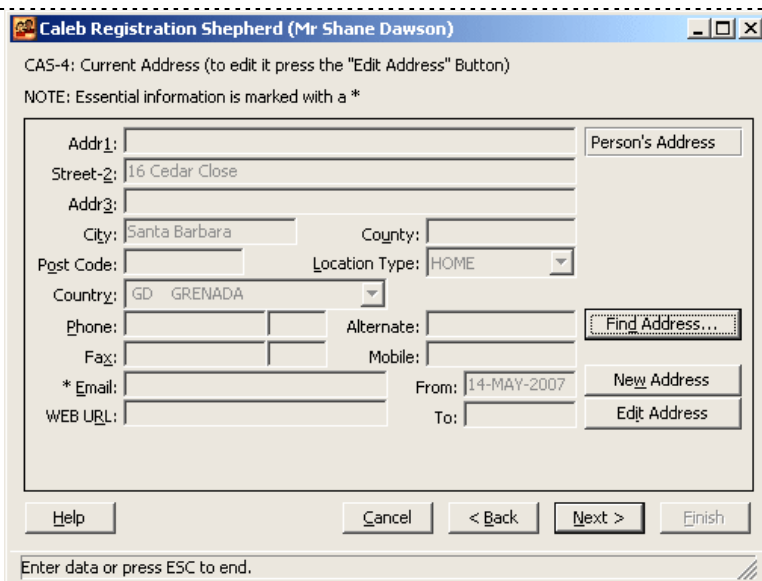
You can run the Caleb Registration Shepherd from either the main Personnel Module Screen (menu bar item **Individuals > Caleb Registration Shepherd**). Alternatively, if you are working on an individual, you can run this from the Individual Data Screen, (Figure 2-2, page 15), using the menu bar item **Individual > Caleb Registration Shepherd**.

The Shepherd takes you through screens to review the data needed in the Caleb Registration export, allowing you to check and enter any missing information. Most of the screens are simple, and it is obvious what to do. However, some screens are more complex, and these are explained below.

CAS-4 Current Address

The screen is initially disabled, showing the best address for the person. To edit the address, click **Edit Address**.

If you know that there should be a second address for a person, this can, in theory, be entered from this screen by clicking on **Find Address** for an address that already exists in PETRA or **New Address** for a completely new address. However, if this Shepherd screen does not show whether additional address have already been added for this partner, so if in doubt, always use the *Partner Edit Screen* rather than this Shepherd Screen.



Caleb Registration Shepherd (Mr Shane Dawson)

CAS-4: Current Address (to edit it press the "Edit Address" Button)

NOTE: Essential information is marked with a *

Address 1: Person's Address

Street 2: 16 Cedar Close

Address 3:

City: Santa Barbara County:

Post Code: Location Type: HOME

Country: GD GRENADA

Phone: Alternate: Find Address...

Fax: Mobile:

* Email: From: 14-MAY-2007 New Address

WEB URL: To: Edit Address

Help Cancel < Back Next > Finish

Enter data or press ESC to end.

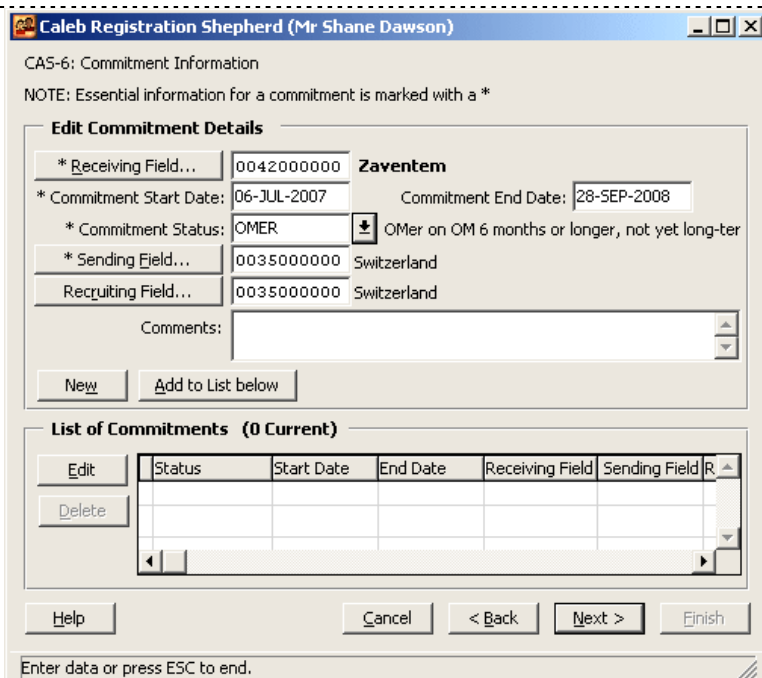
CAS-6 Commitment Information

This screen is used to enter details of commitments. More than one can be entered.

Enter the details of the first commitment in the upper part of the screen. For more information on commitments see section 2.2.13, page 26.

Click **Add to List Below** to transfer this commitment to the list of commitments in the lower half of the screen. To add a second commitment, click **New**.

To edit a commitment, double-click it in the lower list, to bring the details to the upper part of the screen. To delete a commitment, highlight it and click **Delete**.



Caleb Registration Shepherd (Mr Shane Dawson)

CAS-6: Commitment Information

NOTE: Essential information for a commitment is marked with a *

Edit Commitment Details

* Receiving Field... 0042000000 Zaventem

* Commitment Start Date: 06-JUL-2007 Commitment End Date: 28-SEP-2008

* Commitment Status: OMER OMER on OM 6 months or longer, not yet long-term

* Sending Field... 0035000000 Switzerland

Recruiting Field... 0035000000 Switzerland

Comments:

New Add to List below

List of Commitments (0 Current)

Edit	Delete	Status	Start Date	End Date	Receiving Field	Sending Field

Help Cancel < Back Next > Finish

Enter data or press ESC to end.

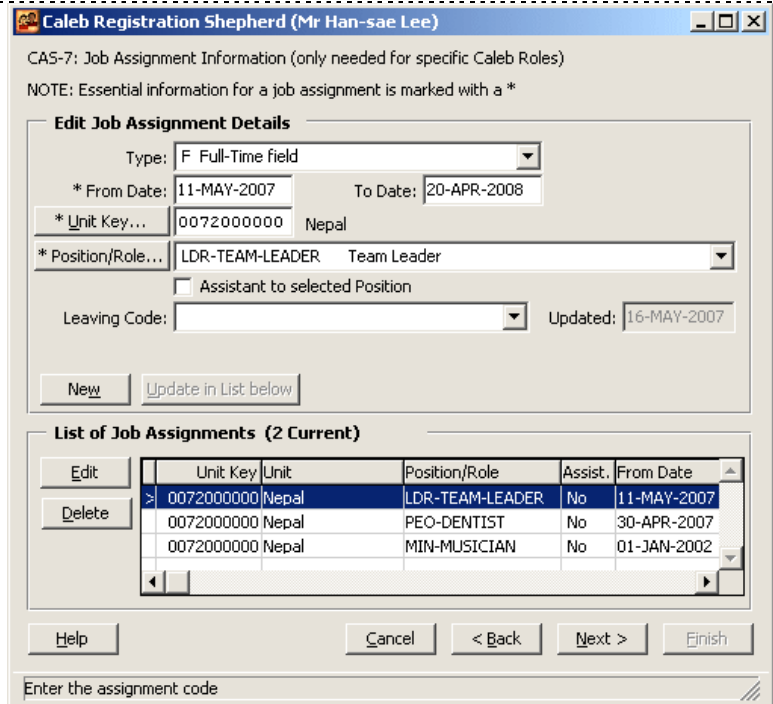
CAS-7 Job Assignment Details

This screen is used to enter details of commitments. More than one can be entered.

Enter the details of the first commitment in the upper part of the screen. For more information on commitments see section 2.2.13, page 26.

Click **Add to List Below** to transfer this commitment to the list of commitments in the lower half of the screen. To add a second commitment, click **New**.

To edit a commitment, double-click it in the lower list, to bring the details to the upper part of the screen. To delete a commitment, highlight it and click **Delete**.



Caleb Registration Shepherd (Mr Han-sae Lee)

CAS-7: Job Assignment Information (only needed for specific Caleb Roles)

NOTE: Essential information for a job assignment is marked with a *

Edit Job Assignment Details

Type: F Full-Time field

* From Date: 11-MAY-2007 To Date: 20-APR-2008

* Unit Key... 0072000000 Nepal

* Position/Role... LDR-TEAM-LEADER Team Leader

☐ Assistant to selected Position

Leaving Code: Updated: 16-MAY-2007

New **Update in List below**

List of Job Assignments (2 Current)

	Unit Key	Unit	Position/Role	Assist.	From Date
>	0072000000	Nepal	LDR-TEAM-LEADER	No	11-MAY-2007
	0072000000	Nepal	PEO-DENTIST	No	30-APR-2007
	0072000000	Nepal	MIN-MUSICIAN	No	01-JAN-2002

Edit **Delete**

Help **Cancel** **< Back** **Next >** **Finish**

Enter the assignment code

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

Index for Personnel 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.



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