



Guide

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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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PETRA System Manager Guide

Chapters

Chapter 1 Overview of System Manager	7
Chapter 2 System Setup	11
Chapter 3 Users.....	19
Chapter 4 Printing.....	27
Chapter 5 Startup and Shutdown	35
Chapter 6 Backup and Restore.....	39
Chapter 7 Housekeeping	43
Chapter 8 Patches	49
Chapter 9 System Manager Reports.....	51
Chapter 10 ODBC.....	55
Chapter 11 Troubleshooting	57
Chapter 12 Advanced Configuration	59
Index to System Manager Guide.....	61

Detailed Table of Contents

Chapter 1 Overview of System Manager	7
1.1 Access to System Manager	7
1.2 Scope.....	7
1.3 Menu Structure	7
1.4 Structure of this Guide	9
Chapter 2 System Setup	11
2.1 Sites.....	11
2.2 System Parameters	11
2.3 Language Specifics	13
2.3.1 Creating Month Names for your Language	13
2.3.2 Editing Existing Month Names.....	14
2.3.3 Deleting Month Names.....	15
2.4 Logon Message	15

2.4.1	Creating a New Logon Message	15
2.4.2	Editing a Logon Message	16
2.5	Module Setup	16
2.5.1	Finance & Ledger Setup	16
2.5.2	Regional Offices	16
2.5.3	Departments	17
2.6	Housekeeping and Reminders	17
2.6.1	Housekeeping and Reminders – Network Version	17
2.6.2	Housekeeping and Reminders – Standalone Version	17
Chapter 3	Users	19
3.1	Modules	19
3.1.1	Ledger Modules	20
3.2	User Groups	20
3.3	Creating a User	20
3.4	Editing a User	23
3.5	Retiring a User	23
3.6	Unretiring a User	24
3.7	Changing a User's Password	24
3.8	Editing a Group	24
Chapter 4	Printing	27
4.1	Forms	27
4.1.1	Form to Module Assignment	27
4.1.2	Creating a New Form	28
4.1.3	Editing a Form	29
4.1.4	Deleting a Form	29
4.1.5	Assigning a Form to a Module	29
4.1.6	Removing a Form from a Module	30
4.2	Labels	30
4.2.1	Creating Labels	30
4.2.2	Editing Labels	32
4.2.3	Deleting Labels	33
4.3	Printer Trays	33
4.4	Reprinting Reports	33
Chapter 5	Startup and Shutdown	35
5.1	The Network Version	35
5.1.1	Network Startup	35
5.1.2	Network Shutdown	35
5.1.3	Logging Off a User	35
5.2	The Standalone Version	37
5.2.1	Standalone Startup	37
5.2.2	Standalone Shutdown	37
Chapter 6	Backup and Restore	39
6.1	The Network Version	39
6.1.1	Network Backup	39
6.1.2	Network Restore	40
6.1.2.1	Database Restore	40
6.1.2.2	Full Restore	40
6.2	The Standalone Version	40
6.2.1	Standalone Backup	41

6.2.2	Standalone Restore	41
6.2.2.1	Database Restore.....	41
6.2.2.2	Full Restore.....	42
6.2.3	Moving Petra to a Different Drive	42
Chapter 7	Housekeeping	43
7.1	Housekeeping.....	43
7.1.1	Setting up Housekeeping	43
7.1.2	Network Housekeeping.....	44
7.1.3	Standalone Housekeeping.....	44
7.2	Archiving Reports.....	44
7.3	Purge Expired Addresses	45
7.4	Temporary Files.....	46
Chapter 8	Patches	49
8.1	Installing the Files.....	49
8.1.1	Network	50
8.1.2	Standalone.....	50
8.2	After Patching	50
Chapter 9	System Manager Reports.....	51
9.1	Partner Full Report.....	51
9.2	Expired Addresses	52
9.3	Tables Print	52
9.4	Current Users	52
9.5	Logins Log.....	52
9.6	Error Log.....	53
9.7	Report File Log.....	53
9.8	Database Log	53
Chapter 10	ODBC.....	55
10.1	ODBC Server	55
10.2	ODBC Driver	55
Chapter 11	Troubleshooting	57
Chapter 12	Advanced Configuration	59
12.1	Automatic Detection of User ID	59
12.2	Email Program	59
12.3	Number Format.....	59
12.4	Number of Licensed Users.....	60
12.5	Watchdog Process.....	60
12.6	Website	60
Index to System Manager Guide.....		61

You must back up PETRA regularly. If you do not, you will lose all your data – partner addresses, financial records – everything.

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Chapter 1 Overview of System Manager

The System Manager Module is used to perform functions which set up and manage the use of PETRA. These functions can be quite technical, and so should be carried out by an experienced user.

1.1 Access to System Manager

PETRA comes with a special User ID, SYSADMIN, who has access to the System Manager Module (and nothing else). The password for this user is given in the installation documentation. SYSADMIN is used to create other users, who can be given access to the System Manager Module by making them members of the SYSADMIN group. See the chapter on Users for details of how to do this.

1.2 Scope

Some of the System Manager functions will be used only once, when PETRA is first installed. Others, such as the User Maintenance functions will be used whenever someone joins or leaves the office. The Housekeeping functions should be performed on a regular basis as a matter of good practice.

PETRA comes in two versions: Network, installed on a Standard Linux Server and used by many people at once from Windows PCs; and Standalone, installed on a PC running Microsoft Windows and used by one person at a time. Some of the system management procedures are different depending on which version you have. Both versions are described in this manual.

1.3 Menu Structure

On entry to the System Manager module, the *System Manager Screen* is displayed. All procedures in this Guide are carried out from this screen.



Figure 1-1 System Manager Screen

- **File Menu** gives access to the Run command to install patches, the Partner Full Report to print all data about a Partner from the Finance, Partner and Personnel modules, and Purge Expired Addresses to remove unused addresses from the database.

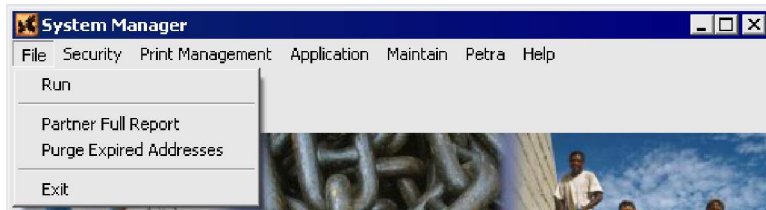


Figure 1-2 File Menu

- **Security Menu** is used to control who has access to PETRA, and the level of access that they have. You can also look at the Logins and Error Logs from here.

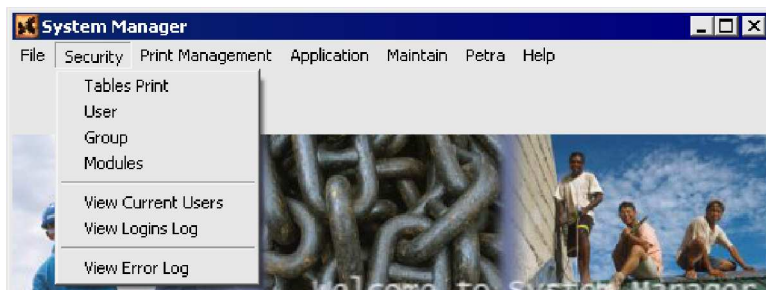


Figure 1-3 Security Menu

- **Print Management Menu** lets you set up the forms that PETRA uses to print (paper size, margins, and character size), including address labels. You can examine a printer's paper tray settings, which can be useful if you need to print form letters or receipts on different kinds of paper. Finally, this is where you can see what reports have been printed, and purge the old files.



Figure 1-4 Print Management Menu

- **Application Menu** is where you can run housekeeping functions.

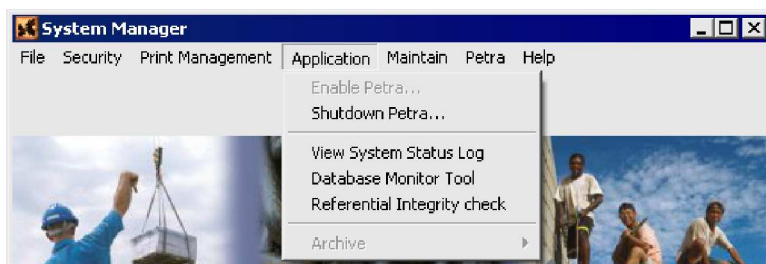


Figure 1-5 Application Menu

- **Maintain Menu** is used to set up PETRA before it can be used. It is also used to set the message users see when they log in, the language that dates appear in, and how the housekeeping functions operate.

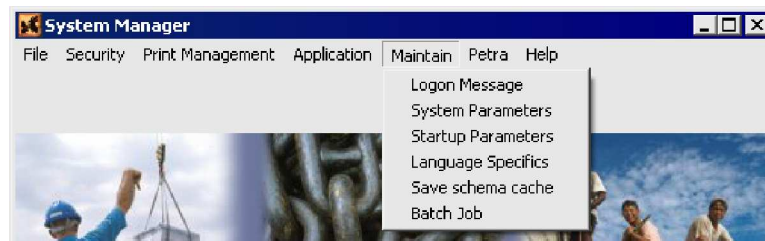


Figure 1-6 Maintain Menu

- **Petra Menu** (not shown) gives access to the other PETRA modules.
- **Help Menu** (not shown) gives access to the online help. The Help menu also shows the current patch level and patch history by selecting About Petra, and can be used to file a bug report.

1.4 Structure of this Guide

The Guide is organised into 12 chapters.

Chapter 1 Overview of System Manager

Chapter 2 System Setup explains how to set up PETRA before it is used for the first time.

Chapter 3 Users how to create users and give them access to what they need.

Chapter 4 Printing how to manage printing in PETRA.

Chapter 5 Startup and Shutdown how to start and stop PETRA.

Chapter 6 Backup and Restore how to keep your data when your computer breaks.

Chapter 7 Housekeeping tasks that need to be done regularly to delete old files and information that is out of date.

Chapter 8 Patches how to check what patches have been installed, and apply new ones.

Chapter 9 System Manager Reports explains the reports available to the System Manager.

Chapter 10 ODBC how to use PETRA data in other applications, such as Microsoft Access.

Chapter 11 Troubleshooting answers to some possible problems, and where to go for more help.

Chapter 12 Advanced Configuration explains the more technical configuration options which some system administrators will need to be aware of.

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

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Chapter 2 System Setup

Before PETRA can be used, it needs to be set up. This involves setting parameters that relate to your office and options for PETRA's behaviour. Once these settings have been entered, you will still need to create users (see chapter 3) and set up each module that they will use.

2.1 Sites

First you must tell PETRA which Site (that is, an Area, Field, or Office) it is going to be used for. Most offices will only need to set up one Site – their own. An office that handles data for two or more Sites (for example, a Field office that also handles the personnel administration for its Area) should set up each one. Once a Site has been set up, it can be used as the Site Key for your office, and PETRA will automatically provide partner keys as you create new partners.

If your Site Key is not in the Available Site list (for example if you are a Regional Office) it will have to be created as a unit in the Personnel Module. See Section 2.5.2 Regional Offices on page 16, and the Personnel User Guide.

1. From the *System Manager Screen*, select **Maintain** then **System Parameters** which will bring up the *System Parameters Maintenance Screen*.
2. From the **File** menu, choose **Add Site**. The *Installed Site List* appears.

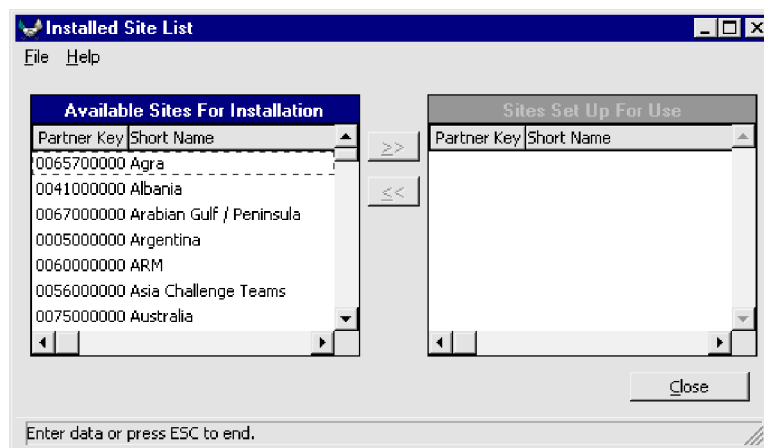


Figure 2-1 Installed Site List

3. Select your Site from the list of Available Sites, then choose the **>>** button to make it available for use.
4. To remove a Site from the Set Up list, select it and choose the **<<** button.
5. Choose **Close** to close the screen and return to *System Parameters*.

2.2 System Parameters

To enter the System Parameters, follow these steps:

1. From the *System Manager Screen*, select **Maintain** then **System Parameters** which will bring up the *System Parameters Maintenance Screen*.

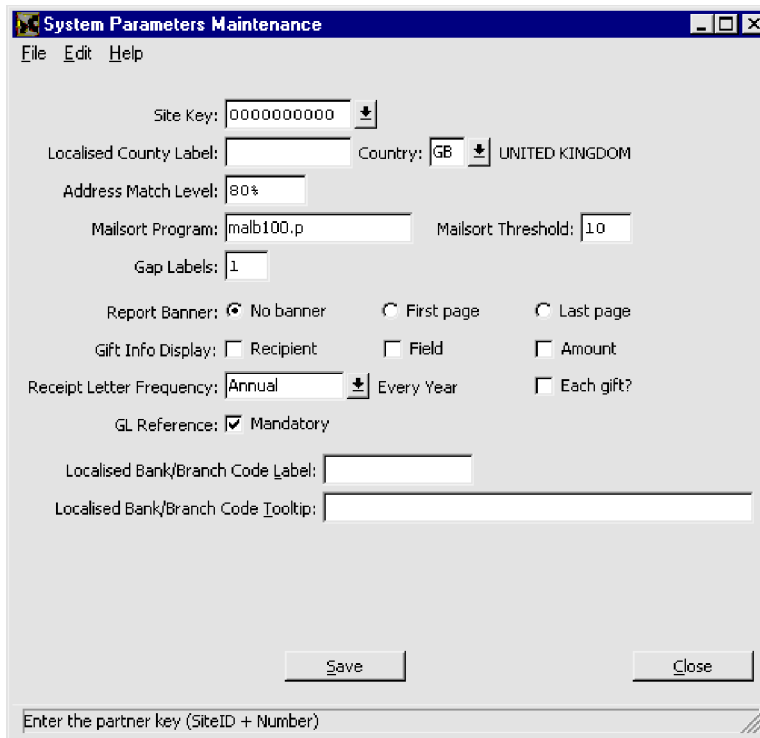


Figure 2-2 System Parameters Maintenance Screen

2. Enter the following fields:

Site Key This is the Partner Key for your office. This is where PETRA gets the site name that appears at the top of all reports, and it is very important for Caleb and when creating new partners. The drop-down list contains the sites that you set up in section 2.1 above.

Important: two offices must never have the same Site Key. See Regional Offices on page 16 if you have two offices working for the same Field or Area.

Localised County Label One of the fields of an address is called 'County'. This is appropriate in the UK, but other countries will use other names such as 'State', 'Region', 'Province' or 'Canton'. Set this to whatever is appropriate for you, and it will appear on the *Partner Edit Screen*.

Country Set this to your country.

Address Match Level Duplicate Address Check in the Partner Module checks your database to see if the same address has been entered more than once. The Address Match Level defines how close 2 addresses need to be before they are considered the same. A value of 0% would match any two addresses, regardless of their content. A value of 100% would only match addresses that are totally identical. The default of 80% should work in most cases.

Mailsort Program This is used to process mailings according to their destination, which can lead to lower postage costs. The default program is 'malb100'. If an alternative is required, contact the PETRA Development Team.

Mailsort Threshold This defines the minimum number of items in a mailsort bundle. If there are few items than the number specified here, they will be combined with the bundle for the nearest destination.

Gap Labels When printing address labels, some sites like to leave some blank labels between different postal zones. Other sites view this as a waste of labels. Here is where you change it.

Report Banner You can have an extra page print at the beginning or end of a report showing who printed it.

Gift Info Display The *Partner Edit Screen* can display certain gift information for a partner. Tick 'Recipient', 'Field' and/or 'Amount' if you want users of the Partner Module to see this data. Users can only see the ticked items if they have appropriate Finance access rights in addition to Partner access rights.

Receipt Letter Frequency Each partner has a setting saying how often they are to be sent receipt letters for their gifts. This is where you set the default value that new partners will be given when they are created.

Receipt Each Gift Each partner has a setting saying whether they will be sent a receipt for each gift. The alternative is a summary. The default that newly-created partners are given is specified here.

GL Reference When entering transactions into the General Ledger in the Finance Module, there is a field called 'Reference'. If you tick 'Mandatory' here, that field *must* be filled in. If 'Mandatory' is not ticked, the finance users can leave the reference blank.

Localised Bank/Branch Code Label Enter the name that you would use for a bank's branch code. For example, in the UK it would be "Sort Code"; in Austria, Germany and Switzerland "BLZ"; and in South Africa "Branch Code". This appears on screens displaying bank account details in the Partner and Finance Modules.

Localised Bank/Branch Code Tooltip Enter the help text that you would like to appear for the Bank/Branch Code field.

3. Choose **Save** to save the data, and **Close** to close the screen.

2.3 Language Specifics

Around the world, people write dates in different ways. Take, for example, '1/7/99'. In America, that means the 7th of January, while in England, it means the 1st of July. Most people would assume it refers to the year 1999, but it could equally mean 2099 or indeed any other century.

PETRA gets around this by always displaying dates in an internationally recognisable format: '1-JUL-1999'. In Language Specifics, you can enter the names of the months in your own language, so that your users do not have to use the English versions.

2.3.1 Creating Month Names for your Language

1. Go to the *Language Specifics List Screen* by selecting **Maintain** and **Language Specifics**.

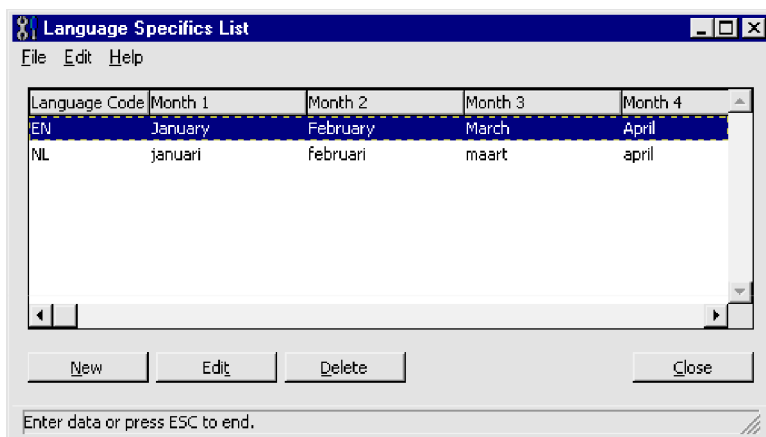


Figure 2-3 Language Specifics List

- Choose the **New** button, which will bring up the *Language Specifics Maintenance Screen*.

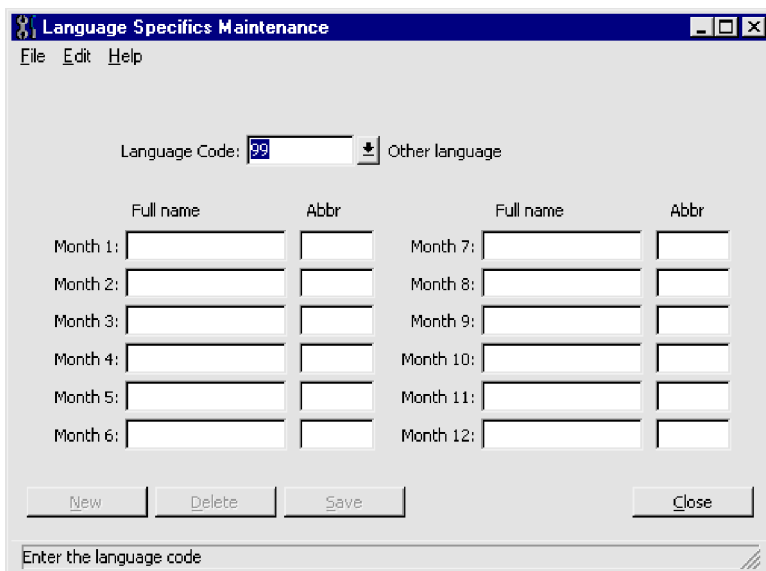


Figure 2-4 Language Specifics Maintenance Screen

- Enter the data in the fields as required:
 - Language Code** Select the code for your language.
 - Full Name** Enter the full name of each month in your language.
 - Abbr** Enter the abbreviated name of each month in your language e.g. Jan for January.
- Choose **Save** to save the data, and **Close** to close the screen.

2.3.2 Editing Existing Month Names

- From the *System Manager Screen* select **Maintain** and **Language Specifics**.
- Highlight the language you wish to edit and choose the **Edit** button.
- Edit the data as described in Section 2.3.1 above.
- To save the data, choose **Save** then **Close**.

2.3.3 Deleting Month Names

1. From the *System Manager Screen* select **Maintain** and **Language Specifics**.
2. Highlight the language you wish to delete and choose the **Delete** button, The *Confirm Delete Box* will ask *Do you really want to delete it?* If you are sure you want to, choose **Yes**.

2.4 Logon Message

When a user logs on to PETRA, a message is displayed on the *Petra Main Menu*. This is normally 'Welcome to Petra', but you can change it to anything you want, and even have different messages for users who speak different languages.

2.4.1 Creating a New Logon Message

1. From the *System Manager Screen*, select **Maintain** then **Logon Message**. This will bring up the *Logon Message List Screen* showing the messages in each language.

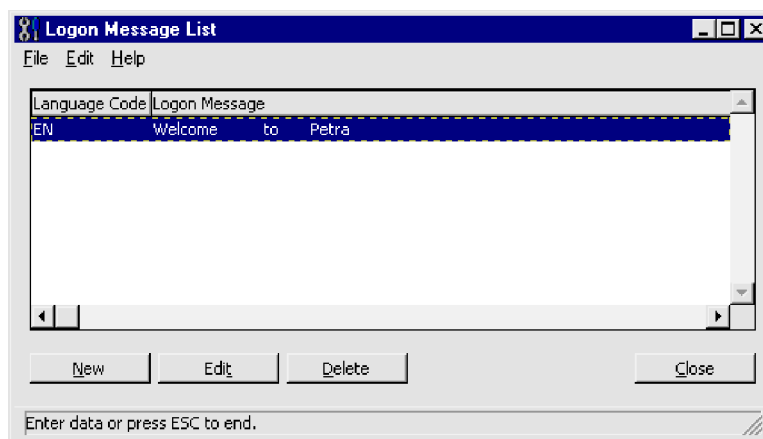


Figure 2-5 Logon Message List Screen

2. Choose **New** to bring up the *Logon Message Maintenance Screen*.

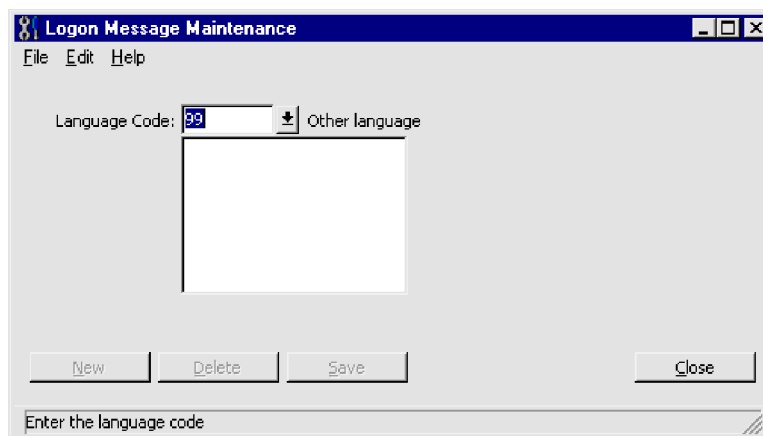


Figure 2-6 Logon Message Maintenance Screen

3. Enter the **Language Code** for your message, or select it from the list.
4. Type the text for your logon message in the large box.

5. To save it, choose **Save** then **Close**.

2.4.2 Editing a Logon Message

1. From the *System Manager Screen*, select **Maintain** then **Logon Message**. This will bring up the *Logon Message List Screen* showing the messages in each language.
2. Highlight the message you wish to edit and choose **Edit** to bring up the *Logon Message Maintenance Screen*.
3. Edit the message.
4. Choose **Save** to save your changes, then **Close**.

2.5 Module Setup

The individual modules with PETRA also need to be set up. Before you can do that, however, you will need to create users to access them, as discussed in the next chapter. The additional setup steps are:

- Finance & Ledger
- Regional Offices
- Departments

2.5.1 Finance & Ledger Setup

This is described fully in the Finance User Guide. If you are a Regional Office, set up the Finance Module with the ledger for your Main Office.

2.5.2 Regional Offices

Some fields consist of more than one office, for example Finance and Personnel may be located in different places, or you may have one or more other offices as well as your Main Office. A Finance office will normally be the Main Office with the field's standard Site Key, while a Personnel Office should be set up as a Regional Office. Regional Offices need to be created as new Units relating to your Main Office. The full instructions for creating new Units are found in the Personnel User Guide, but there are some special requirements for Regional Offices:

Partner Key must have the same ledger number (the first 4 digits) as the Main Office, have one digit to identify the office and end with 00000. *For example, the Swiss Office is ledger 0035. If they were to set up a Regional Office in Zurich, it could be given the key 0035200000. Other offices would be 0035300000, 0035400000 etc.*

Partner Class must be Unit.

Special Type Offices should have a Special Type of COSTCENTRE.

Unit Hierarchy The Regional Office must be a Child Unit of the Main Office.

Finance Ledger In the Finance Module, select **Ledger** then **Setup** then **Cost Centres** then **Link to Partner**. The *Valid Foreign Ledgers List* will appear. Highlight the Regional Office Unit and choose **Add**. On the *Maintenance Screen* that appears enter a Cost Centre number with a Type of **Local**.

Receipt Number If a Regional Office is receipting gifts, the receipt numbers should probably have a different starting point from the Main Office.

Site Key If you are the Regional Office, don't forget to set your site key when you have finished.

For consolidation at the Main Office, any Regional finance data will either be summarised and sent to the Main Office to be entered manually, or exported as batches which can be imported into the Main system.

2.5.3 Departments

Some fields prefer to have their Office split into Departments, and use the Personnel Commitment Record to assign individuals to these Departments. This allows financial reporting through department to see if each department is covering both ministry and personal living costs. Fields where living costs are pooled should not need this feature.

To set up Departments, create each one as a new Unit under your Office, according to the instructions in the Personnel User Guide. These Units should have the following characteristics:

Partner Key use the default Partner Key given on the *New Partner Screen*.

Partner Class must be Unit.

Special Type Departments should have a Special Type of COSTCENTRE.

Unit Hierarchy Departments should be Child Units to your Office.

Finance Ledger In the Finance Module, select *Ledger* then *Setup* then *Cost Centres* then *Link to Partner*. The *Valid Foreign Ledgers List* will appear. Highlight the Department Unit and choose *Add*. On the *Maintenance Screen* that appears enter a Cost Centre number with a Type of *Local*.

2.6 Housekeeping and Reminders

Housekeeping functions (see Chapter 7) and Partner Reminders (see the Partner User Guide) need to be run regularly.

2.6.1 Housekeeping and Reminders – Network Version

Configure how often you want to run housekeeping using the Housekeeping option on the `sysadm petra22` menu. Reminders are automatically processed early every morning.

2.6.2 Housekeeping and Reminders – Standalone Version

Reminders are run automatically when you log in to PETRA. Both Housekeeping and Reminders can be run manually from the Windows *Start* menu, *Programs* ► *Petra 2.2. Running Reminders* from the Windows Task Scheduler is not recommended, because attempting to send email while the computer is in a locked state can have unpredictable effects.

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

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Chapter 3 Users

Each person who uses PETRA must have their own User ID and password. The User ID controls what they have access to within PETRA. There are two special User IDs that come with PETRA:

- **GUEST** This user has very limited access. It can view, but not change any data.
- **SYSADMIN** This has already been discussed. It does not have access to any of the PETRA modules, but is used to set up and maintain the system.

Other users must be created by the System Manager.

There are two different kinds of things a PETRA user can have access to: screens, and data. For example, the easiest way to stop a member of the Personnel Department from looking at confidential financial data is to stop them using any of the Finance Module screens. However, people in the Finance Department may need to look up addresses, so they would have access to Partner Module screens – but only to read the data, not change it. Similarly, the Finance Manager should be able to create new accounts, but a data entry clerk should not.

PETRA is big, so it would be very complicated (and boring) if you had to go through every screen and data table each time you created a new user, giving and restricting access. Fortunately, PETRA provides two ways to make this much easier: modules and groups.

3.1 Modules

You will already be familiar with the terms ‘Partner Module’, ‘Finance Module’ and so on. A module is a group of PETRA screens. If a user has access to a module, they can use all the screens in that module. The full list of modules can be seen on the *Module List Screen* by selecting *Security* then *Modules*.

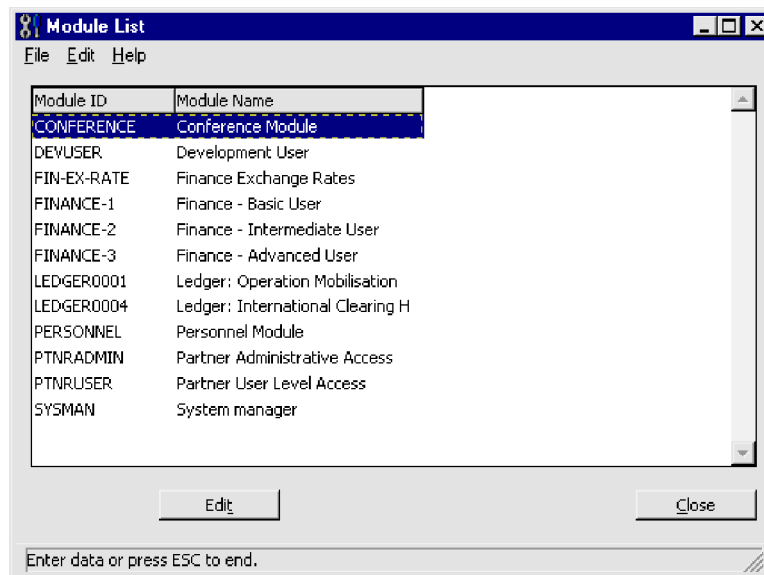


Figure 3-1 Module List Screen

You can see that Partner and Finance have been split into two or three modules. These represent different levels of access: a user of the Finance-3 module can use screens that a Finance-1 user cannot.

3.1.1 Ledger Modules

You can also see in Figure 3-1 two modules called 'Ledger0001' and 'Ledger0004'. These do not represent groups of programs. They represent ledgers. When a new ledger is created in Finance, the person who created it can obviously use it. But what about other users? You may want several ledgers on your system, with different people using each one. To allow ledger access to be restricted, each ledger also appears as a module. If you want to let someone use a ledger, you must give them access both to the Finance Module and to the ledger they need. This is fully explained later in 'Creating a User'. PETRA will warn you if you forget the ledger part when you create a user.

3.2 User Groups

A Group is a collection of module access and data access. Instead of setting up each user's module and data access individually, you make them a member of a Group. Then they can use everything that their Group can use. If they need more, you can make them members of more Groups until they have what they need. If you change the access level of a Group, everyone who is in that Group gets the new access too. This can be an easy way of making sure all your Finance users have access to your ledger. PETRA comes with a number of standard Groups already set up:

Group Name	Access Level
BANKENTRY	Bank Account and Credit Card entry
CONF-USER	Conference Management access
DEVADMIN	Financial Development administration
DEVUSER	Financial Development access
FINANCE-1	Basic Finance access
FINANCE-2	Intermediate Finance access
FINANCE-3	Advanced Finance access
GUEST	View basic Personnel and Partner data
PERS-ADMIN	Enter and view basic Personnel data Configure Personnel Module
PERS-USER	Enter and view basic Personnel data
PERS-VIEW	View basic Personnel data
PTNRADMIN	Enter and view basic Partner data Configure Partner Module
PTNRUSER	Enter and view basic Partner data
SYSADMIN	System Manager access
USER	General access – Partner, Personnel and Finance

3.3 Creating a User

1. From the *System Manager Screen* select **Security** then **User**. The *User List Screen* will appear.

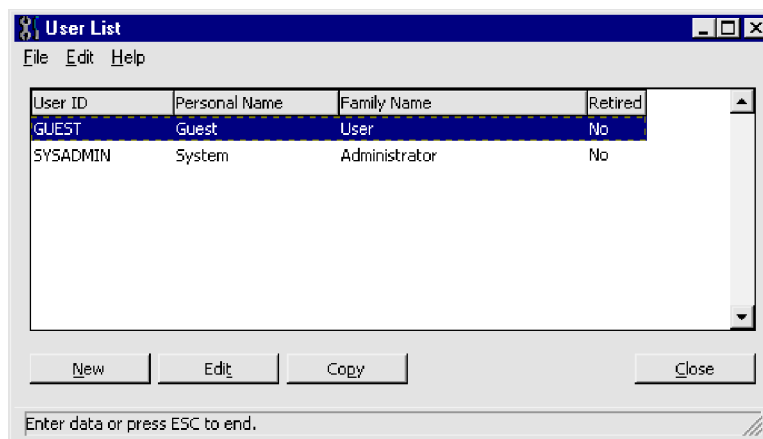


Figure 3-2 User List Screen

- Choose **New** which will bring up the *User Maintenance Screen*.

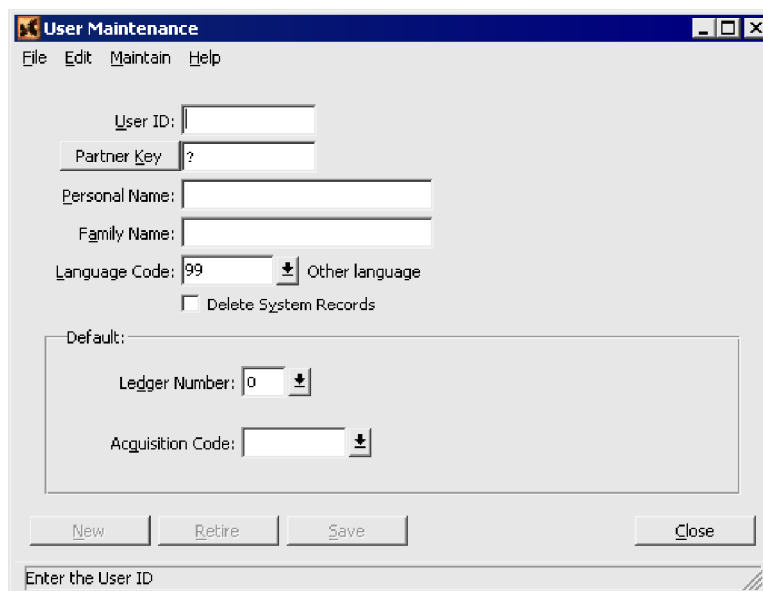


Figure 3-3 User Maintenance Screen

- Enter the fields required:

User ID must be at least 5 characters, without spaces. Normally it will be the same as the name with which the user logs on to the network or to Windows.

If you are very concerned about security, you can use a different name. In that case even if an unauthorised person managed to get in to Windows, they would still not know anything about how to log in to PETRA – not even a user name. See ‘Automatic Detection of User ID’ on page 59.

Partner Key links the user to an existing person record. This will automatically fill in the personal and family name fields. Financial Development users need to be linked to their person records in order to be made Foundation Owners (see the Partner User Guide).

Personal Name the user’s first or personal name.

Family Name their surname or family name.

Language Code their preferred language.

Delete System Records not currently used.

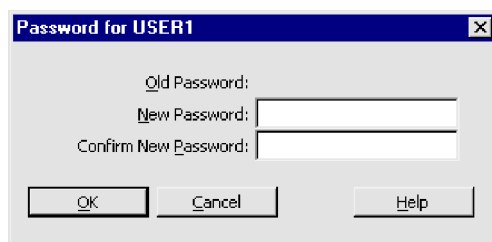
Ledger Number the ledger that the user wants to open automatically when they enter the Finance Module. This only makes sense if there is more than one ledger on your system.

Acquisition Code new partners created by the user get the acquisition code set here. If the user changes a partner's acquisition code, the new code becomes the default and is shown here.

4. Make sure the User ID is correct, then choose **Save** to create the user.

Once the User has been saved, the ID cannot be deleted or edited. Make sure it is correct before saving.

5. Give the user a password. Choose **Maintain** and **Password**. The *Password* dialogue box appears.



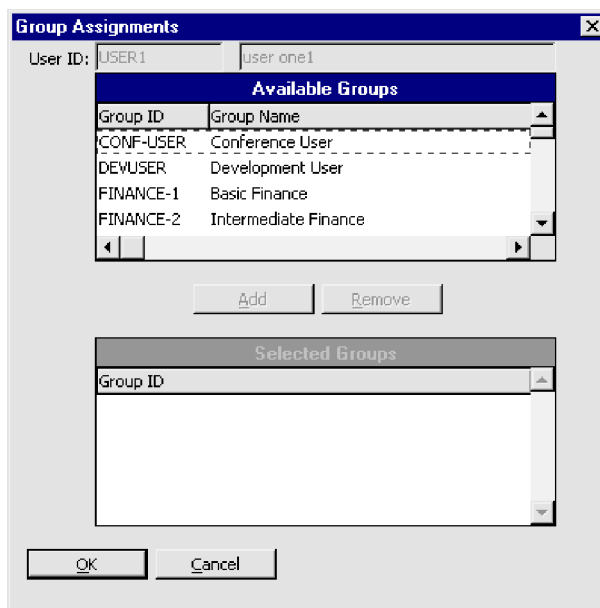
The dialog box titled "Password for USER1" contains three input fields: "Old Password:", "New Password:", and "Confirm New Password:". Below the fields are three buttons: "OK", "Cancel", and "Help".

Figure 3-4 Password Dialogue

6. Choose a password. Passwords must be at least 5 characters, and are case sensitive. You will not be able to see what you are typing, so you need to enter it in the New and Confirm boxes to prevent mistakes. Press [Return] or choose **Ok** when you have finished.

Note a common problem that prevents users logging in is having the keyboard Caps Lock turned on. If the password they enter differs in any way from what they were given here, it will not work.

7. Now you need to put the user in their groups. Choose **Maintain** again and this time choose **Group Assignments**. The *Group Assignments Screen* appears.



The "Group Assignments" dialog box shows the "User ID:" as "USER1" and "user one1". It features a table of "Available Groups" with columns "Group ID" and "Group Name". Below the table are "Add" and "Remove" buttons. At the bottom is a "Selected Groups" section with a "Group ID" field and an empty list box. "OK" and "Cancel" buttons are at the bottom.

Group ID	Group Name
CONF-USER	Conference User
DEVUSER	Development User
FINANCE-1	Basic Finance
FINANCE-2	Intermediate Finance

Figure 3-5 Group Assignments Screen

Highlight all the groups you want the user to be a member of. You can choose multiple groups by holding down the [Ctrl] key as you click on them. When you have selected all the groups you want, choose **Add**. You will see the groups appear in the bottom part of the screen. When you have finished, choose **OK**.

8. If the user has Finance access, and if you have any ledgers set up, you will need to give them access to their ledger. Choose **Maintain and Module Access Permissions**. The *User Module Access Permissions Screen* appears.

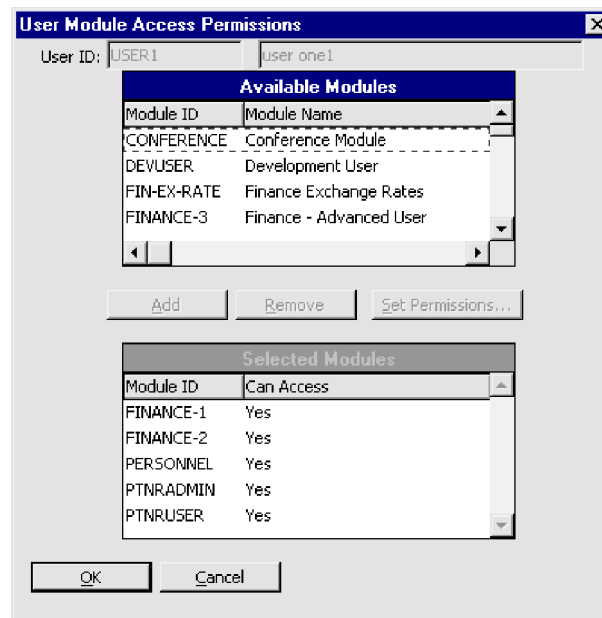


Figure 3-6 User Module Access Permissions Screen

Scroll down the list of Available Modules until you find the ledger. Select it and choose **Add**. You can select several ledgers by holding down [Ctrl] as you click on them. Choose **OK** when you have finished.

Tip This gives one user access to the ledger. You may find it more convenient to give their Group access to it instead. See 'Editing a Group' below.

9. The user is now ready. Close the *User Maintenance Screen*.

3.4 Editing a User

To alter an existing user:

1. On the *System Manager Screen*, choose **Security and User**.
2. Highlight the user you wish to edit and choose **Edit**.
3. Enter the new details as described in 'Creating a User' on page 20.
4. **Save and Close**.

3.5 Retiring a User

You cannot delete users once they have been created. When a person leaves the office, you disable their User ID by 'retiring' it. If they return, you can 'unretire' it.

1. On the *System Manager Screen*, choose **Security** and **User**.
2. Highlight the user you wish to retire and choose **Edit**.
3. On the *User Maintenance Screen* choose **Retire**.
4. The *Confirm Retire dialog box* appears. Choose **Yes** to retire the user.

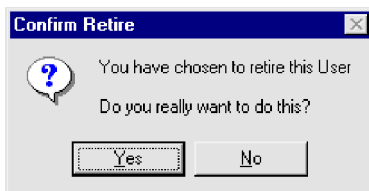


Figure 3-7 Confirm Retire Box

5. Close the *User Maintenance Screen*. The user will be shown as Retired on the *User List Screen*. A Retired user cannot log in to PETRA.

3.6 Unretiring a User

To re-activate a retired User ID:

1. On the *System Manager Screen*, choose **Security** and **User**.
2. Highlight the user you wish to retire and choose **Edit**.
3. On the *User Maintenance Screen* choose **Unretire**.
4. Close the *User Maintenance Screen*. The user will be shown as not Retired on the *User List Screen*, and they will be able to use PETRA again.

3.7 Changing a User's Password

A user can change their own password from the PETRA Main Menu by choosing **Options** and **Change Password** (see the General User Guide). If a user has forgotten their password, you will have to reset it for them:

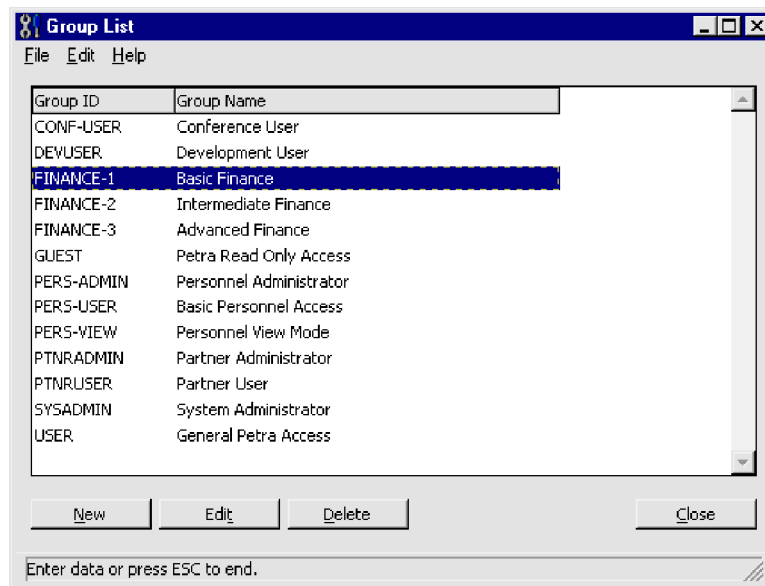
1. On the *System Manager Screen*, choose **Security** and **User**.
2. Highlight the user you wish to retire and choose **Edit**.
3. On the *User Maintenance Screen* choose **Maintain** and **Password**.
4. Enter and confirm the new password, then choose **OK**.

3.8 Editing a Group

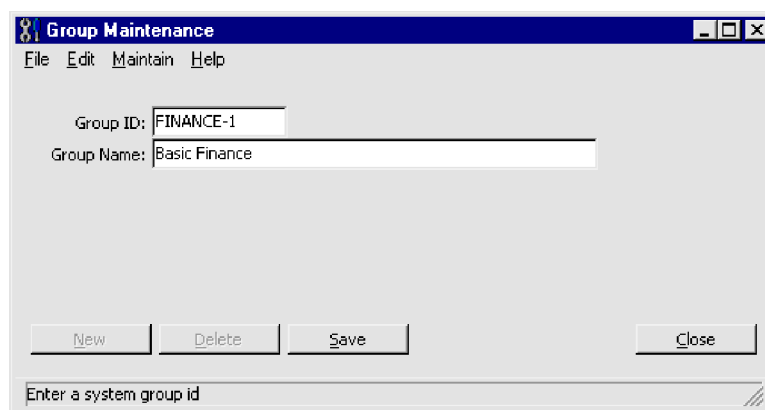
Normally, you should not need to edit PETRA's groups. If you only have one ledger though, and a large number of users need to access it, it can be convenient to add the ledger module to your Finance groups.

To add a module to a group:

1. From the *System Manager Screen*, select **Security** and **Group** to see the *Group List Screen*.

**Figure 3-8 Group List Screen**

2. Highlight the group you wish to edit. Choose **Edit** to bring up the *Group Maintenance Screen*.

**Figure 3-9 Group Maintenance Screen**

3. Choose **Maintain** and **Module Access Permissions** which will bring up the *Group Module Access Permissions Screen*.

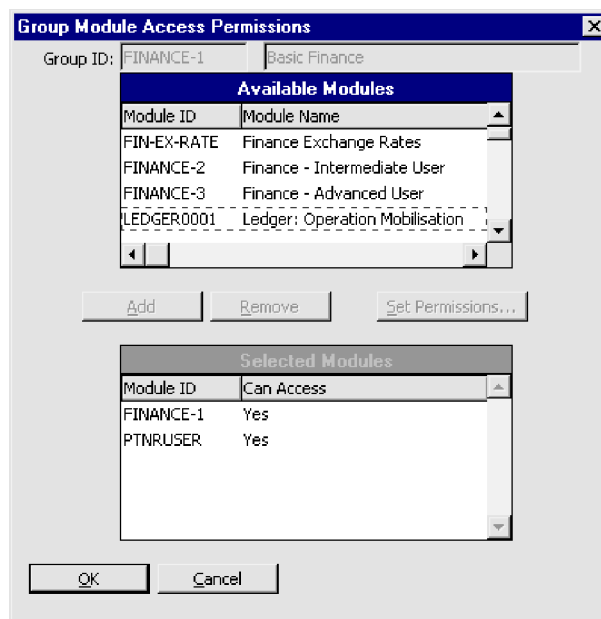


Figure 3-10 Group Module Access Permissions Screen

4. Scroll down the list of Available Modules until you find the ledger you want to add, and highlight it. You can select more than one ledger by holding down [Ctrl] as you click them, but don't do that unless you're *really sure* that everyone in that group needs *all* of the chosen ledgers.
5. Choose **Add** to add the ledger to the group, then **OK**.
6. Close the *Group Maintenance Screen*.

All users who were in this group will now have access to the ledger, and any new users who are put into this group will be given access to it automatically.

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

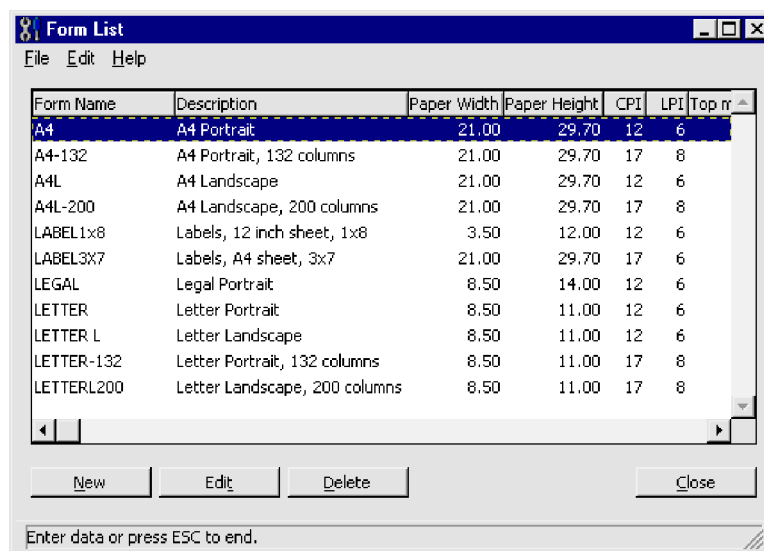
Chapter 4 Printing

PETRA is capable of producing several different kinds of printed output: reports, receipts, form letters and labels. These can be displayed on the screen, saved as text or html files, and emailed as well as being printed.

Most reports are 132 characters wide, so they need to be printed using a small font and with small margins. A few reports are even wider than this, and need to be printed in landscape format. Letters, on the other hand, look best with larger font and margins. To look after these different requirements, PETRA uses forms.

4.1 Forms

A form is a stored set of paper, margin and font settings. Everything you print to a particular form comes out looking the same way. PETRA comes with several forms built in, which allow you to print the standard reports and letters on common paper sizes. If you have any other kinds of paper, such as pre-printed receipts, you can easily create a new form with the correct settings. The forms and their descriptions can be seen on the *Form List Screen* by selecting **Print Management** then **Form**.



Form Name	Description	Paper Width	Paper Height	CPI	LPI	Top margin
A4	A4 Portrait	21.00	29.70	12	6	
A4-132	A4 Portrait, 132 columns	21.00	29.70	17	8	
A4L	A4 Landscape	21.00	29.70	12	6	
A4L-200	A4 Landscape, 200 columns	21.00	29.70	17	8	
LABEL1x8	Labels, 12 inch sheet, 1x8	3.50	12.00	12	6	
LABEL3x7	Labels, A4 sheet, 3x7	21.00	29.70	17	6	
LEGAL	Legal Portrait	8.50	14.00	12	6	
LETTER	Letter Portrait	8.50	11.00	12	6	
LETTER L	Letter Landscape	8.50	11.00	12	6	
LETTER-132	Letter Portrait, 132 columns	8.50	11.00	17	8	
LETTERL200	Letter Landscape, 200 columns	8.50	11.00	17	8	

Figure 4-1 Form List Screen

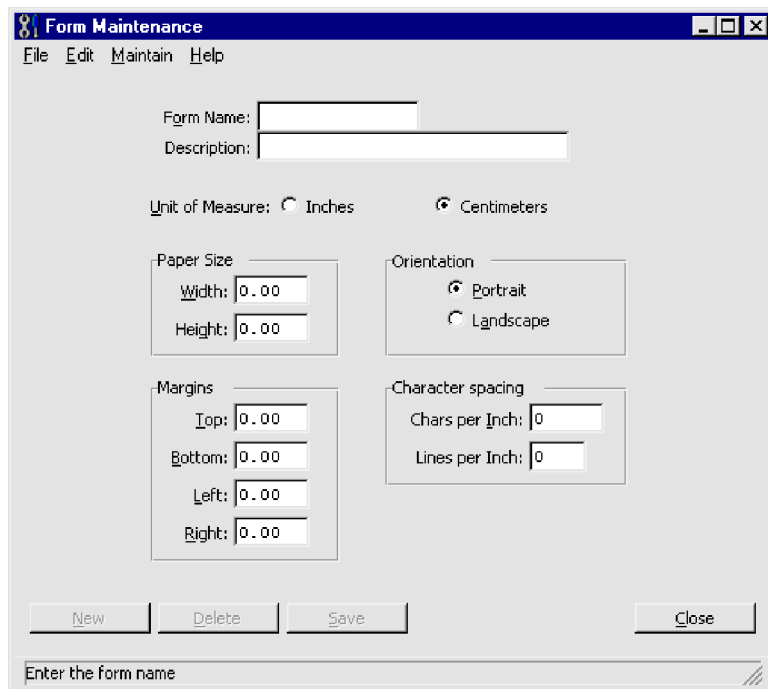
4.1.1 Form to Module Assignment

Not every PETRA module needs to be able to use every form. For example, the only thing you can print from System Manager is 132-column reports. You don't need any of the forms designed for writing letters. If the only paper size you use in your office is A4, you don't need any of the forms defined for other paper sizes. When you ask for a printout and the *Start Print Job Screen* appears, the only forms that will be available are the ones that have been assigned to the module you are printing from.

Note it is a common mistake to create a new form but forget to assign it to any modules. If your new form does not appear on the *Start Print Job Screen*, this is the reason.

4.1.2 Creating a New Form

1. From the *System Manager Screen*, select **Print Management** and **Form**. The *Form List Screen* will appear.
2. Choose **New**. The *Form Maintenance Screen* will appear.



The screenshot shows the 'Form Maintenance' window with a menu bar (File, Edit, Maintain, Help) and several input fields. At the top are 'Form Name' and 'Description' text boxes. Below them are radio buttons for 'Unit of Measure' (Inches and Centimeters, with Centimeters selected). The 'Paper Size' section contains 'Width' and 'Height' text boxes, both set to '0.00'. The 'Orientation' section has radio buttons for 'Portrait' (selected) and 'Landscape'. The 'Margins' section has four text boxes for 'Top', 'Bottom', 'Left', and 'Right', all set to '0.00'. The 'Character spacing' section has two text boxes for 'Chars per Inch' and 'Lines per Inch', both set to '0'. At the bottom are four buttons: 'New', 'Delete', 'Save', and 'Close'. A status bar at the very bottom says 'Enter the form name'.

Figure 4-2 Form Maintenance Screen

3. Enter the data required:

Form Name choose a name that easily reminds you of the size and format.

Description enter a longer description of what this form is for.

Unit of Measure choose **Centimeters** or **Inches**.

Paper Size enter the size of the paper in the units you chose.

Orientation choose **Portrait** or **Landscape**.

Margins enter the margins you want between the edges of the paper and the start of your text. If you enter 0, you will get the minimum possible margin for your printer.

Character Spacing enter the character size that you want as Characters per Inch and the line spacing as Lines per Inch. Note that these two settings are *always* in *inches*.

4. Save the new form.
5. Assign it to at least one Module. Choose **Maintain** and **Form** to **Module Assignment**. The *Modules Assigned to Form Screen* appears.

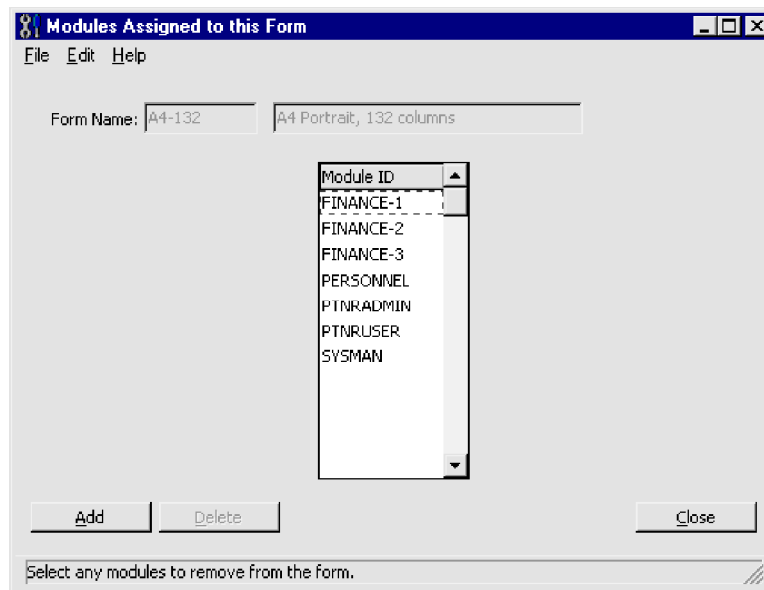


Figure 4-3 Modules Assigned to Form

6. Choose **Add** and a list of available modules appears. You can select more than one by holding down [Ctrl] as you click on them. Choose **Ok** when you have finished.
7. Close the *Modules Assigned to Form Screen*.

4.1.3 Editing a Form

To change an existing form, follow these steps:

1. From the *System Manager Screen*, choose **Print Management** and **Form** to bring up the *Form List Screen*.
2. Highlight the form you wish to edit and choose the **Edit** button to open the *Form Maintenance Screen*.
3. Enter the new details as described in 'Creating a New Form' above.
4. **Save** and **Close** the *Form Maintenance Screen*.

4.1.4 Deleting a Form

To delete a form that you will not need again, follow these steps:

1. From the *System Manager Screen*, choose **Print Management** and **Form** to bring up the *Form List Screen*.
2. Highlight the form you wish to delete and choose the **Delete** button.
3. The *Confirm Delete Box* will ask 'Do you really want to delete it?'. Choose **Yes** if you are sure.

4.1.5 Assigning a Form to a Module

This has already been discussed in 'Creating a New Form'. To add an existing form to more modules:

1. From the *System Manager Screen*, choose **Print Management** and **Form** to bring up the *Form List Screen*.
2. Highlight the form and **Edit** it.

3. On the *Form Maintenance Screen* menu, choose **Maintain** and **Form to Module Assignment**.
4. The modules the form already belongs to are listed on the *Form to Module Maintenance Screen*. Choose **Add** to add more.
5. Select the new modules from the list of available modules. You can select more than one by holding down **[Ctrl]** as you click them. Choose **Ok** when you have finished.
6. Close the *Modules Assigned to Form Screen* and *Form Maintenance Screen*.

4.1.6 Removing a Form from a Module

If you want to stop a form appearing in the list of forms on the *Start Print Job Screen* for a particular module, you can remove its assignment:

1. From the *System Manager Screen*, choose **Print Management** and **Form** to bring up the *Form List Screen*.
2. Highlight the form and **Edit** it.
3. On the *Form Maintenance Screen* menu, choose **Maintain** and **Form to Module Assignment**.
4. Select the modules you want to remove, and choose **Delete**.
5. If you are sure this is what you want, choose **Yes** on the *Confirm Delete Box*.
6. Close the *Modules Assigned to Form Screen* and *Form Maintenance Screen*.

4.2 Labels

PETRA can print addresses on sheets of sticky labels. There are a lot of different kinds of label paper though, so you have to tell PETRA which ones you are using. Label setup comes in two parts: the labels themselves, and the form they are printed on. The label settings tell Petra what size the individual labels are and how they are laid out on the page. The form settings, as before, give the size and margins of the whole page.

Note it is a common mistake to try to print labels on one of the standard report forms. If you do this, the margins and spacing will be wrong. Make sure you use the correct form for your labels.

PETRA comes with two types of label paper already set up:

Label Type	Form	Description
1x8	LABEL1x8	8 labels down a sheet of 11-inch continuous paper, suitable for dot matrix printers.
3x7	LABEL3x7	3 labels across and 7 down on a sheet of A4 paper, suitable for laser printers.

Note Petra still measures label sizes as an exact number of lines high, and an exact number of characters wide. Some new brands of label paper in Europe do not work using these measurements. Paper that does work has labels that are 63.5 x 38.1mm, such as 5 Star Laser Labels product code 296778, or Avery Addressing Labels product code L7160.

4.2.1 Creating Labels

To tell PETRA about a new type of label paper, follow these steps:

1. Create a form with the correct paper size and margins. See 'Creating a New Form' above. The Form Name should tell you what it is for. For example, if you are creating a form for 3 by 8 label paper, call it LABEL3x8.
2. From the *System Manager Screen*, choose **Print Management** and **Label** to bring up the *Label List Screen*.

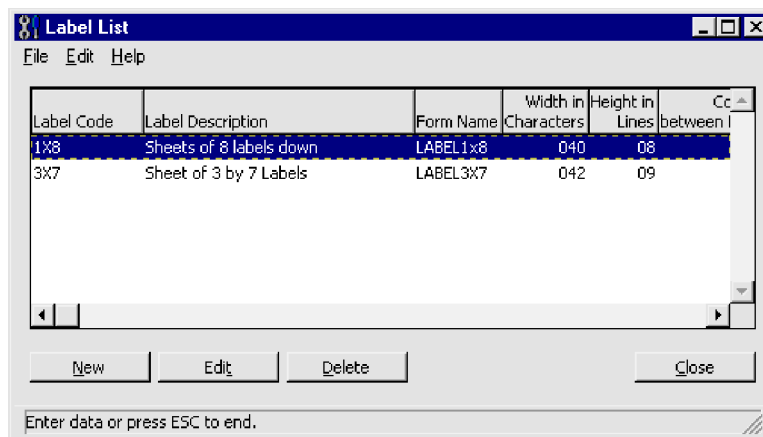
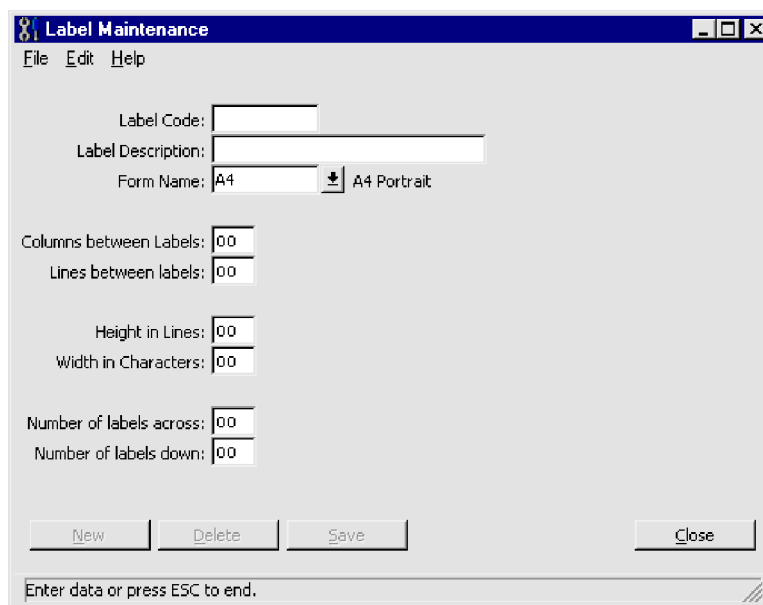


Figure 4-4 Label List Screen

3. Choose **New** to bring up the *Label Maintenance Screen*.



Label Code:
 Label Description:
 Form Name: A4 Portrait
 Columns between Labels:
 Lines between labels:
 Height in Lines:
 Width in Characters:
 Number of labels across:
 Number of labels down:

Figure 4-5 Label Maintenance Screen

4. Enter the settings for your labels. Figure 4-6 shows the measurements you will need:

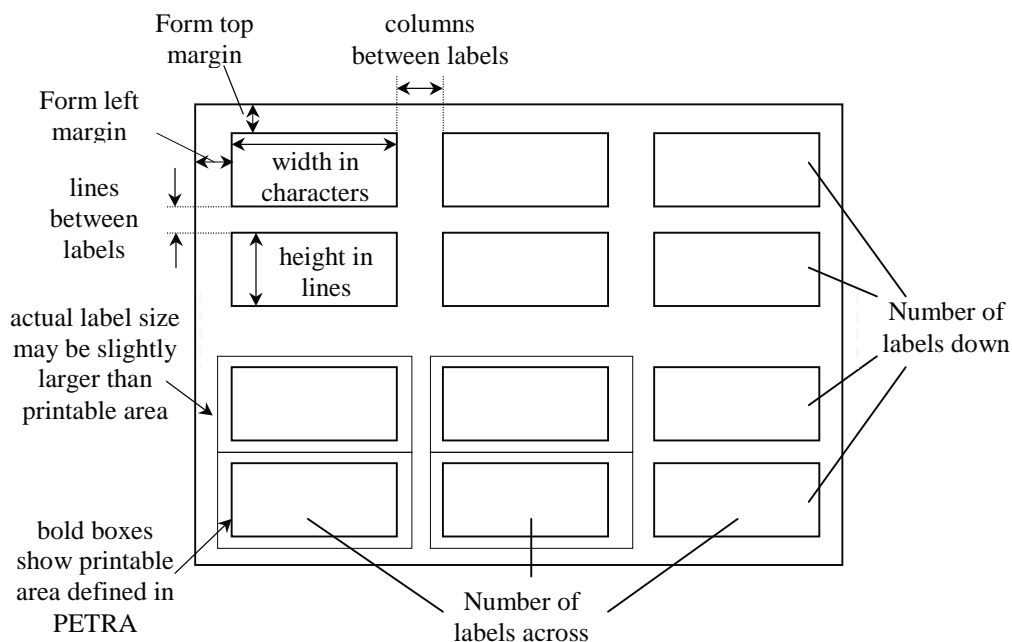


Figure 4-6 Label Measurements

Label Code a code for your new labels. It should tell you what kind of paper these settings are for.

Label Description a longer description.

Form Name select the form these labels should be used with.

Columns between labels the width *in characters* of the gap between the columns of labels. The Characters per Inch setting on the form tells you how wide each character is.

Lines between labels the height *in lines* of the gap between the rows of labels. The Lines per Inch setting on the form tells you how high each line is.

Height in Lines the number of lines that will fit on a label, at the Lines per Inch setting of the form. For example, labels 1.5 inches high would have a height of 9 lines with a 6 Lines per Inch form, but a height of 12 if the form had 8 Lines per Inch.

Width in Characters the number of characters that will fit across each label, at the Characters per Inch setting of the form. For example, labels 2.5 inches wide would have a width of 40 with a 16 Characters per Inch form, but a width of 30 with a 12 Characters per Inch form.

Number of labels across the number of labels across the page.

Number of labels down the number of labels down the page.

5. Save and Close the *Label List Screen*.

4.2.2 Editing Labels

To change the layout of a label sheet, follow these steps:

1. From the *System Manager Screen*, choose **Print Management** and **Label** to bring up the *Label List Screen*.
2. Highlight the label you wish to change and **Edit** it.

Enter the new data in the *Label Maintenance Screen* as described in 'Creating Labels' on page 30.

3. Save and Close the *Label Maintenance Screen*.

4.2.3 Deleting Labels

To delete labels that you are not going to use again:

1. From the *System Manager Screen*, choose `Print Management` and `Label` to bring up the *Label List Screen*.
2. Highlight the label you wish to change and `Delete` it. If you are sure this is what you want to do, choose `Yes` on the *Confirm Delete Box*.
3. `Close` the *Label List Screen*.

4.3 Printer Trays

On the *Start Print Job Screen*, you can specify which of your printer's paper trays you want the print job to be taken from. Sometimes, though, you need more control than this, for example if your form letters have two sections that need to be printed on different kinds of paper.

The `~Ytray.` command can be used in the form letter body (see the *Partner User Guide* for instructions on using form letters), but unfortunately it cannot take a tray name, only a code number. And each printer, of course, has its own set of code numbers for its trays.

From the *System Manager Screen*, select `Print Management` and `Paper Trays`. Now you can see the tray names and code numbers for each of your printers.

Remember if you have set up a form letter to use a specific printer's tray settings, it will almost certainly not work properly on any other printer. If you change printers, you will have to change the tray codes in the form letter as well.

4.4 Reprinting Reports

Users can reprint their own reports in the ways described in the *General User Guide*. If necessary, the *System Manager* can also reprint reports, like this:

1. From the *System Manager Screen*, choose `Print Management` and `View Report Files`.
2. Highlight the report you want to reprint and choose the `Print` button. The *Start Print Job Screen* will appear for the report you selected.
3. Select the options you want and choose `OK`.

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

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Chapter 5 Startup and Shutdown

This is one area where the Network and Standalone versions of PETRA are very different. On a network, PETRA will be active on your server all the time. On a standalone computer, it will normally be shut down unless you are using it.

5.1 The Network Version

5.1.1 Network Startup

When you start your Linux server, PETRA will be started automatically. Users will be able to connect to it from their workstations.

If it has been shut down for any reason, it may be started like this:

1. Log in to your Linux server as `root`.
2. Type `sysadm petra22`.
3. Select `Start`. A startup summary will be displayed.

Note the start option is not available from the *sysadm petra22 screen* if PETRA is already running.

5.1.2 Network Shutdown

When you shut down your Linux server, PETRA will be shut down cleanly. If you want to shut it down manually, you can do so:

1. Warn all your users, so that they can finish and work they are doing. The Finance Department may not like it if you shut down while they are running a month end. Try to avoid that.
2. Log in to your Linux server as `root`.
3. Type `sysadm petra22`.
4. Select `Stop`.
5. You will be asked 'Do you really want to shut down the database?': choose `Yes` if you really want to shut down. A shutdown summary will be displayed.

Anyone who was still using PETRA will be disconnected, and any work they had not saved will be lost.

Note The stop option is not available from the *sysadm petra22 screen* if PETRA is already shut down.

5.1.3 Logging Off a User

If a network user's computer crashes, the server should automatically disconnect their connection after a few minutes. If this did not happen, they might receive messages like 'Unable to edit this record. Partner Edit record is being edited by another user' when they logged back in to carry on what they were doing. If necessary, you can manually disconnect a user; it is a two-stage process now, because we are half-way through converting from the old Progress server to the new Petra server, and both used by different parts of PETRA. This is the procedure:

1. Log in to Linux as `root`.

2. Type `sysadm petra22`.
3. Select `ConnectedClients`.

ID	Client Connected since	Status Last activity	Computer Server Port	IP Address
38	MORAYH_38 14/11 08:22:44	Idle 14/11 08:22:47	dell150 2101	10.10.1.166
40	MORAYH_40 14/11 12:20:13	Idle 14/11 12:20:15	Dell150 2103	10.10.1.166
42	RICHARDP_42 14/11 14:58:23	Idle 14/11 14:58:26	Dell145 2102	10.10.1.174

(Currently connected Clients: 3; client connections since Server sta

In this example, connection 38 is the older of MORAYH's two connections, and is therefore the one that should be disconnected.

4. Select `Exit` to return to `sysadm`.
5. Select `Administration` then `Disconnect` to disconnect them from the Petra Server.
6. Choose the user you identified earlier (in this case number 38), and OK.
7. Now select `Monitor` to disconnect them from Progress.
8. Enter the number 8 to choose `Shut Down Database` to bring up a list of all users connected to the database, for example:
9. Enter the number 1 to choose `Disconnect a User`.

usr	pid	time of login	user id	tty	Limbo
27	12546	Wed Nov 14 12:20:14 2007	petraserver		no
28	3948	Wed Nov 14 12:20:07 2007	MORAYH	Dell150	no
29	12546	Wed Nov 14 14:58:25 2007	petraserver		no
30	1944	Wed Nov 14 14:58:18 2007	RICHARDP	Dell145	no
33	1756	Wed Nov 14 08:22:36 2007	MORAYH	Dell150	no

- 1 Disconnect a User
- 2 Unconditional Shutdown
- 3 Emergency Shutdown (Kill All)
- x Exit

Enter choice>

In this example, user number 33 corresponds to the connection we are trying to remove..

10. Enter the number 1 to choose `Disconnect a User`.
11. Enter the number of the user you want to disconnect.
12. Enter `x` to exit from that menu, then `q` to return to the `sysadm petra22admin` screen.
13. Press `[Esc]` until `sysadm` closes, then log off.

Note Accidentally disconnecting the wrong user will log them out of PETRA (and may annoy them), but will not damage the database.

5.2 The Standalone Version

5.2.1 Standalone Startup

To use PETRA, open the Windows Start Menu and choose Programs ► Petra 2.2 ► Petra 2.2 Standalone or double-click the Petra 2.2 Standalone icon on your desktop.

This will start both PETRA and the ODBC server, because part of the Finance Module, Accounts Payable, accesses data using ODBC. You will also be able to use other applications, such as Microsoft Access, to query data in Petra. See Chapter 10 ODBC on page 55 for more information about using ODBC; if you think PETRA is complicated already, wait till you try it like this.

If you want to look at your data in other applications without running PETRA, you can start the ODBC server manually. Open the Windows Start Menu and choose Programs ► Petra 2.2 ► Start ODBC Server. An MS-DOS window will appear briefly.

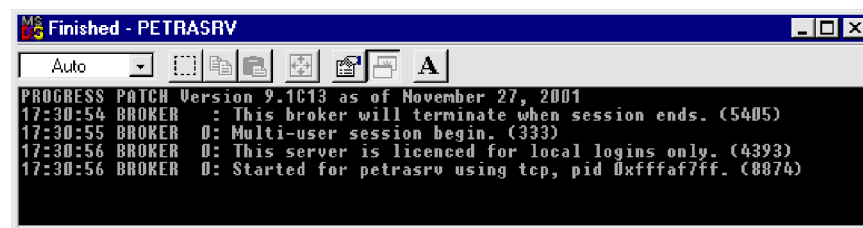


Figure 5-1 Start ODBC Server Summary

WARNING in very old versions of PETRA, if you received a 'database is already running' message, you could delete the petra.lk file. **DO NOT** do that in this version.

5.2.2 Standalone Shutdown

When you exit from PETRA, it closes down along with the ODBC server.

To shut down the ODBC Server if you started it manually, open the Windows Start Menu and choose Programs ► Petra 2.2 ► Stop ODBC Server. Enter 2 to choose Unconditional Shutdown.

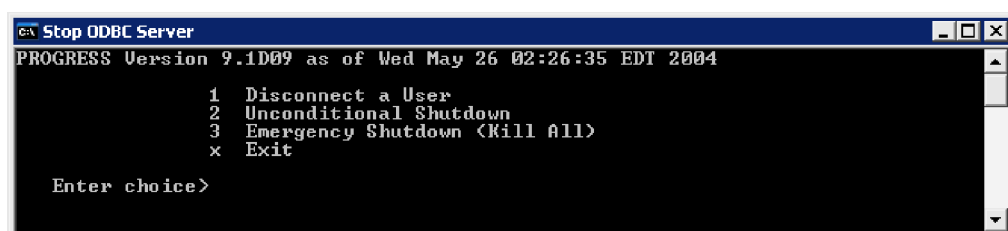


Figure 5-2 Stop ODBC Server Summary

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

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Chapter 6 Backup and Restore

You must back up PETRA regularly. If you do not, you will lose all your data – partner addresses, financial records – everything.

There are two steps involved in making a backup:

1. Creating a backup file, `petra.bak`, that contains all your data.
2. Copying `petra.bak` and any other files you need to keep to a tape, CD or zip-disk, and storing that in a fireproof safe. Keep several versions of these files – do not just use the same tape or disk over and over again.

Always use the PETRA backup commands to create `petra.bak`. **DO NOT** use Windows Explorer, MS-DOS copy command, Linux `cp`, or any other Operating System utility to try to copy any of the database files themselves.

Important in this version of PETRA, the database consists of several different files spread through a number of directories. **Not** just two files as it was in the previous version. *We really, really mean it about not copying them directly.*

The procedures are different for the Network and Standalone versions.

6.1 The Network Version

6.1.1 Network Backup

PETRA will be backed up by the normal overnight backup. This will be an ‘online’ backup, which means that PETRA will not be shut down. The `petra.bak` file is created at the start of the backup, then copied to tape along with everything else. The database files themselves are *not* copied to tape.

You can also make a manual backup, which gives you the option of naming the backup file. There are two ways of doing it: ‘online’ where you leave the database running, and ‘offline’ where you shut it down first. The advantages of an offline backup are that the backup file is smaller, you can verify it, and the database will start up faster if you restore from it. With an online backup, there may be a delay as work that was in progress during the backup is ‘rolled back’.

You should always make a manual backup **before a financial year end** and **before any upgrade**.

This is how you take a backup:

1. Log in to your Linux server as `root`.
2. Type `sysadm petra22`.
3. If you want an offline backup, warn your users that PETRA is going down for a few minutes, then shut it down by selecting `Stop`.
4. Select `Backup`. You will be prompted for a file name. Press `[Return]` to accept the default `petra.bak`, or type in a new name; Linux filename completion using the `[tab]` key works here. If you do not specify a full path name, the file will be stored in `/usr/local/petra/db22`. When the backup has completed a summary will be displayed.
5. To check it, select `Verify`. Note that *verify only* works with offline backups.
6. If this was an offline backup, select `Start` to start PETRA.

6.1.2 Network Restore

If you want to restore only the contents of the database, see ‘Database Restore’. For a full system restore, see ‘Full Restore’.

6.1.2.1 Database Restore

This will restore only the contents of your database. Report files and form letters will be left as they were.

1. Log in to your Linux server as `root`.
2. If restoring from the standard `petra.bak`, make sure that the version in `/usr/local/petra/db22` is the one you want. Copy it from your backup media if necessary.
3. Type `sysadm petra22`.
4. If PETRA is running, select `Stop` to shut it down.
5. Select `Restore`. You will be prompted for the name of a backup file. Press `[Return]` to accept the default `petra.bak`, or type in a new name; Linux filename completion using the `[tab]` key works here. If you do not specify a full path name, the file should be in `/usr/local/petra/db22`. If a version of Petra already exists, you will be asked ‘Do you want to over write it?’
6. A summary of the restore will be displayed.
7. Select `Start` to start PETRA.

6.1.2.2 Full Restore

This will fully restore the whole of PETRA, for example if you have installed a new hard disk in your server.

1. Log in to your Linux server as `root`.
2. Install PETRA from the most recent PETRA Install CD.
3. Restore these directories from your most recent backup:
 - `/usr/local/petra`
 - `/usr/local/samba/dat/petra`
 - `/usr/local/samba/app/Programs/Petra2`
4. Type `sysadm petra22`.
5. Select `Restore`. Press `[Return]` to select the default `petra.bak` file. A basic version of Petra was installed in step 2, which you should over write.
6. Check the restore summary for errors, then `Start` PETRA.

6.2 The Standalone Version

Unlike the Network version, there is no option to back up PETRA automatically. You must **create `petra.bak` each day, and make sure it is included on your regular system backups.**

You should also make an extra backup before a financial year end and before any upgrade.

6.2.1 Standalone Backup

1. Make sure that PETRA is completely shut down, including the ODBC Server.
2. Create petra.bak: Open the Windows Start Menu and choose Programs ► Petra 2.2 ► Backup Petra 2.2. You will be prompted for a file name; press [Return] to accept the default petra.bak, or type in a new name. If you do not specify a full path name, the file will be stored in Petra2\db22. A window will appear with a summary of the backup.

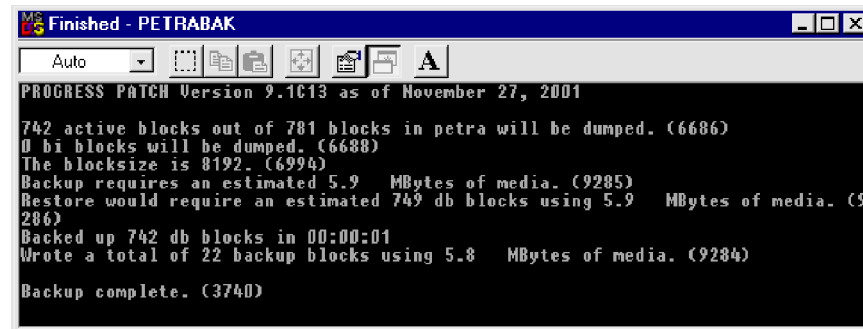


Figure 6-1 Backup Petra Summary

3. Use your normal backup program to copy the entire \Petra2 folder and its subfolders to tape, CD or zip-disk. This will preserve your archived reports, export files, form letters and patches along with petra.bak.

6.2.2 Standalone Restore

6.2.2.1 Database Restore

If you only want to restore to a previous version of your data, follow these steps:

1. If restoring from the standard petra.bak, make sure that the version in the \Petra2\db22 folder is the one you want. Copy it from your backup media if necessary.
2. Open the Windows Start Menu and choose Programs ► Petra 2.2 ► Restore Petra 2.2. You will be prompted for a file name; press [Return] to accept the default petra.bak, or type in a new name. If you do not specify a full path name, the file should be in Petra2\db22.
3. A window will appear and ask if you want to over write your current data. If that is what you really want to do, enter *y*. A summary of the restore will appear.

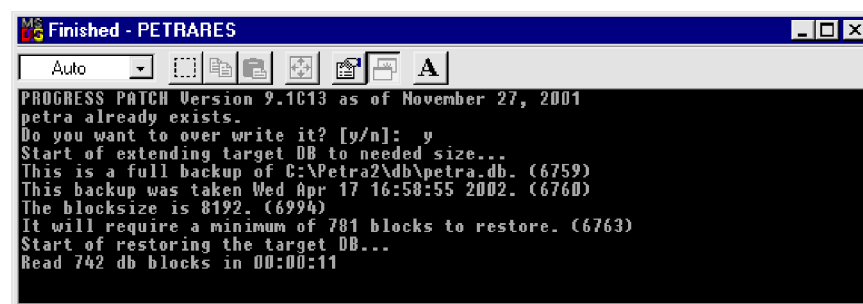


Figure 6-2 Restore Petra Summary

6.2.2.2 Full Restore

If you need to fully restore the whole of PETRA (for example if your hard disk broke, or was erased by a virus) then you need to follow these steps:

1. Install PETRA from the most recent PETRA Install CD.
2. Restore the entire \Petra2 folder from your most recent backup.
3. Open the Windows Start Menu and choose Programs ► Petra 2.2 ► Restore Petra 2.2. Enter the file name or [Return] to restore petra.bak.
4. Enter `y` when asked if you want to over write.

6.2.3 Moving Petra to a Different Drive

If you install another hard disk, or set up an encrypted drive, you may want to move PETRA to it. The procedure is similar to a full restore:

1. Back up the original version.
2. Install PETRA from the most recent PETRA Install CD to the new drive.
3. Copy the contents of the original \Petra2 folder **except the db22 subfolder** to the new drive. It is **important** that you keep the new versions of the files in the db subfolder.
4. Copy the original \Petra2\db22\petra.bak file to the \Petra2\db22 folder on the new drive.
5. Open the Windows Start Menu and choose Programs ► Petra 2.2 ► Restore Petra 2.2, enter the file name if appropriate, and enter `y` when asked if you want to over write.
6. Rename the original \Petra2 folder to \Petra2.old
7. When you are certain that PETRA is working properly from the new drive, delete the original \Petra2.old folders. Your AITA can advise you on special programs to delete data *securely*, if that is necessary: files deleted with Windows Explorer can be recovered by security experts!

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

Chapter 7 Housekeeping

PETRA keeps copies of every report that is printed, and every extract that is created (to find out about extracts, see the Partner User Guide). It also keeps logs of everyone who has logged in, and of certain errors. All these should have old data cleared out regularly. This can be done manually, as discussed in 'System Manager Reports' on page 51, but the easiest way to do it is to use the Housekeeping function.

7.1 Housekeeping

Before running Housekeeping, you must set it up in PETRA. On a Network version, you can have Linux run it automatically, but on a Standalone you must run it yourself.

7.1.1 Setting up Housekeeping

1. From the *System Manager Screen*, select **Maintain** and **Startup Parameters**. The *Startup Parameters Maintenance Screen* appears.

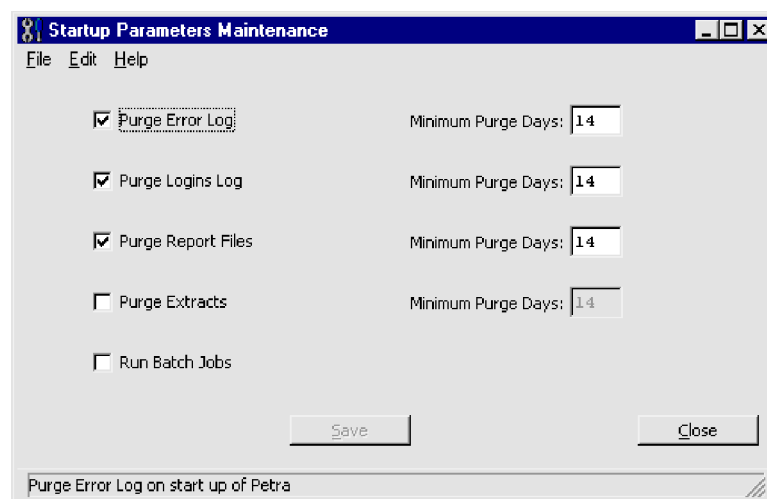


Figure 7-1 Startup Parameters Maintenance Screen

2. Choose what you want the Housekeeping to do:

Purge Error Log tick this if you want old entries to be cleared from the error log. Entries older than the Minimum Purge Days will be deleted (in this case, everything older than 14 days.)

Purge Logins Log tick this if you want the log of who has logged in to PETRA to be cleared. Again, anything older than Minimum Purge Days is deleted.

Purge Report Files tick this if you want old report files to be deleted. Once you have deleted a report, it cannot be reprinted, but see 'Archiving Reports' below to find out how to keep certain reports even when they are older than the Minimum Purge Days.

Purge Extracts tick this to remove all temporary extracts older than the Minimum Purge Days. A temporary extract is listed as Deletable on the *Extract Master List* and *Extract Master Maintenance Screens*.

Run Batch Jobs tick this to have Housekeeping run any batch print jobs. These are created when you set the Run Mode to Batch on the *Start Print Job Screen*.

Note you can create report files in this way under Linux, but they will not print out. You must log in to PETRA and use the reprint procedure described earlier in ‘Reprinting Reports’.

3. Save your settings and Close the screen.

7.1.2 Network Housekeeping

Running Housekeeping on the Network version will shut it down for about one minute, logging off any users. When run automatically, it runs at 4 o’clock in the morning, so this is unlikely to be a problem. If you choose to run it manually, it warns you that it will shut down, and asks if you want to continue.

To tell Linux when you want the Housekeeping to run:

1. Log in to Linux as root.
2. Enter `sysadm petra22`, and choose Housekeeping.
3. Choose how often you want it to run. Whichever options are enabled on the *Startup Parameters Maintenance Screen* are run automatically every day, week, or month, as you specify.
4. Choose OK to return to the *sysadm petra22 screen*.

When it runs, it sends an email to root with a report of what it has done.

NOTE Some sites may run their backup at 4 o’clock in the morning, too. This should not cause a problem, but there will be errors in the backup report if it tries to back up files that Housekeeping has deleted. The solution is to re-schedule the backup to an earlier time e.g. 22:00.

7.1.3 Standalone Housekeeping

1. Make sure that PETRA is completely shut down, including the ODBC Server.
2. Open the Windows Start Menu and choose Programs ► Petra 2.2 ► Housekeeping. As it runs, it will display its progress in an MS-DOS window.

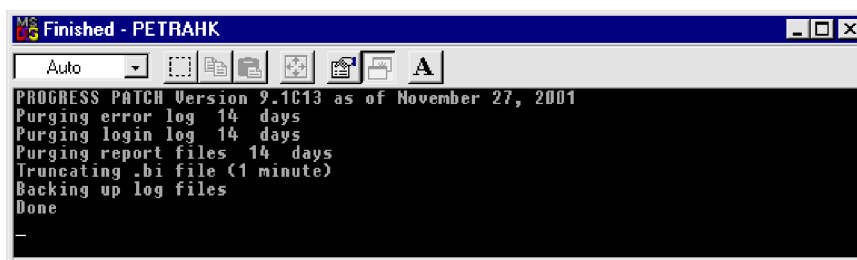


Figure 7-2 Houskeeping Summary

3. When the Housekeeping completes, you can close the window.

7.2 Archiving Reports

You may be required by law to keep certain financial reports for many years, but you do not want to keep everything you have ever printed for this long. PETRA allows you to specify certain reports for Housekeeping to archive instead of deleting them. Reports that have been archived are listed on the *View Report Files Screen* with ‘arc/’ in front the Report File Name.

To set up archiving:

1. From the *System Manager Screen*, select **Print Management** and **View Report Files**.
2. From the *View Report Files Screen*, select **Archiving** and **Reports to Archive**. The *Reports to Archive List Screen* appears.
3. Choose **New**. The *Reports to Archive Maintenance Screen* appears.

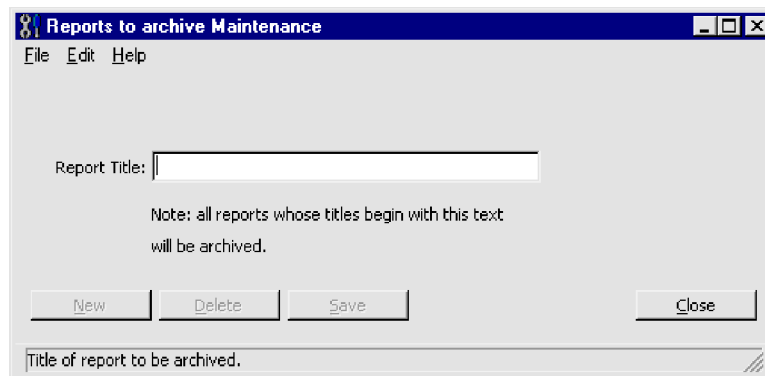


Figure 7-3 Reports to Archive Maintenance

4. **Report Title** is the title of the report you want to archive as it appears on the *View Report Files Screen*. All reports whose titles begin with this text will be archived instead of deleted. For example, entering **Donor Gift Receipt** would allow reports entitled “Donor Gift Receipt”, “Donor Gift Receipt – Batch:16” and “Donor Gift Receipt – Batch:8 Trans:2” to be archived.
5. **Save** and **Close** the screen.

7.3 Purge Expired Addresses

When a Partner moves house, you use the Partner Module to set the date their old address expires. After a time, PETRA may contain a lot of these old addresses that no-one is using any more. They are not removed automatically by Housekeeping, but you should do it manually on occasion. It is not really a good idea to delete addresses as soon as they expire because you may still need to refer to an old address (for example to check a donation).

To purge expired addresses:

1. From the *System Manager Screen*, select **File** and **Purge Expired Addresses**. The *Purge Addresses Box* appears.

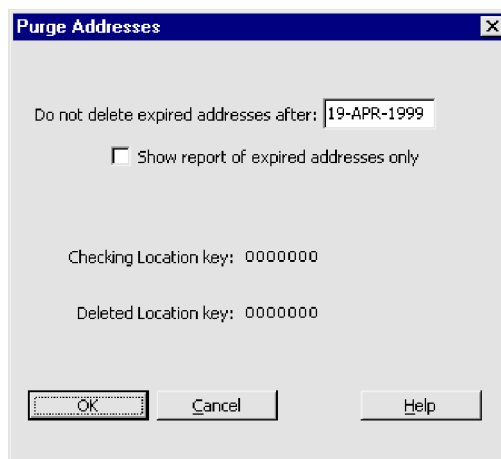


Figure 7-4 Purge Addresses Box

2. Enter the options you want:

Date addresses that expired after this date will not be deleted. You may decide to purge addresses that expired one year ago.

Show Report Only tick this if you want a report of the addresses that expired before the chosen date, but do not want to delete them yet.

3. Choose **OK** when you have finished.

Note this can take a long time. Try to run it when the office is not busy.

7.4 Temporary Files

PETRA can generate a large number of files outside the database. These are stored in the tmp directory.

Version	Tmp directory location
Network	/usr/local/samba/dat/petra/tmp22
Standalone	\Petra2\tmp22

The tmp directory has two subdirectories:

arc is where archived reports are kept. Do not delete anything from here, or you will lose the ability to reprint your archived reports.

Caution if you ever use the Linux 'find' command to delete files from the tmp directory, be *very careful* to tell it not to delete from the arc directory as well.

export is where files that are exported from PETRA go to by default, and where PETRA looks for files to import. Of course, it is better if each user creates and maintains their own directory for PETRA files, and manages the files within it.

Here is a description of the files you are likely to find in the tmp directory:

File Name	Type	Description
r???????.hdr r???????.rpt r???????.prt r???????.out	Report files	If you have any of these that are older than the reports listed on the <i>View Report Files Screen</i> then Petra has lost track of them and they will not be deleted by the report purge. Be careful if you use the Linux 'find' command to delete

		them: unless you use the '-maxdepth' parameter properly, it will descend into your 'arc' directory too and delete things you need to keep.
*.rqf	Email Control files	Created when emailing reports. For normal reports, these should be Deleted automatically along with the other report files, but the HOSA email uses a slightly different mechanism and the file may be left.
*.log	Log files	Created mainly by patches. They are not deleted automatically.
p_*	Export Partner and Extract files	These are not deleted automatically. Only the user who exported the data knows what it is for and how long it is needed.
*.csv	Finance Export files	These are not deleted automatically because only the user who created them can say how long each file needs to be kept.
*.txt	HOSA files	These are not deleted automatically.

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

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Chapter 8 Patches

The PETRA Development Team sometimes send out patches containing new versions of the program screens and updates to the data.

To see which version of PETRA you have, select the Help menu from any screen and choose `About Petra`. This will also tell you the program name and version for the screen you are on.



Figure 8-1 About Petra

If you want to see a list of all the patches that have been installed, choose `Patches`.

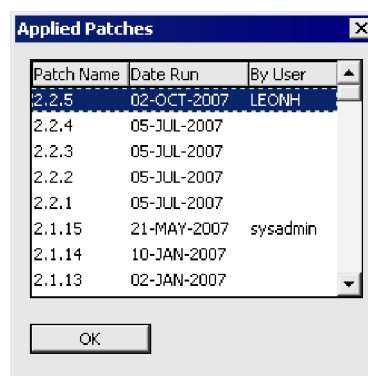


Figure 8-2 Applied Patches

On a Network version, you can also see the current patch from `sysadm` using `sysadm petra22 checkpatch` (the current version) and `sysadm petra22 checkpatches` (the full list).

When a patch is released we send out a notice to the `petra-info` email address at each field. The field I.T. Administrator needs to make sure that mail to this address is forwarded to everyone who needs it. This will include at least themselves, for the patches, and the Personnel Administrator, for notification of conference updates. You can also use the `Check Updates` button, or the `Petra Website` button to visit the website and check for yourself.

Patches are downloaded from the PETRA website, <http://www.ict-software.org/petra/>. You need to download different files for the Network and Standalone versions.

8.1 Installing the Files

Before you start you should read the Release Notes that accompany the patch. You can find these on the website with the patch files. Tell your users that you are updating PETRA, and what changes they can expect.

8.1.1 Network

PETRA needs to be shut down when installing a patch, so warn your users and make sure they log out. It only takes a couple of minutes.

1. Download the network patch .zip file to T:\Programs\Petra2\bin22\net-patches.
2. Log in as `root` on your server.
3. Shut down PETRA.
4. Run `sysadm petra22 patchpetra`.
5. Restart PETRA.

8.1.2 Standalone

1. Log out of PETRA.
2. Download the standalone patch .exe program and run it.

8.2 After Patching

Patches create a log file in the `tmp22` directory (see 'Housekeeping' on page 43), named `v_patch.log`. You should check this file to see what the patch has done.

----- End of Chapter 8 -----

Chapter 9 System Manager Reports

This chapter lists the various reports that are available to the System Manager, dealing with the operation of PETRA and with data security.

9.1 Partner Full Report

It is the law in many countries that a person must be able to see all information that is stored about them in any computer database. The Partner Full Report gives that information. It is part of the System Manager Module because it requires high level access through all of PETRA. To run the Partner Full Report:

1. From the *System Manager Screen*, select **File** and **Partner Full Report**.

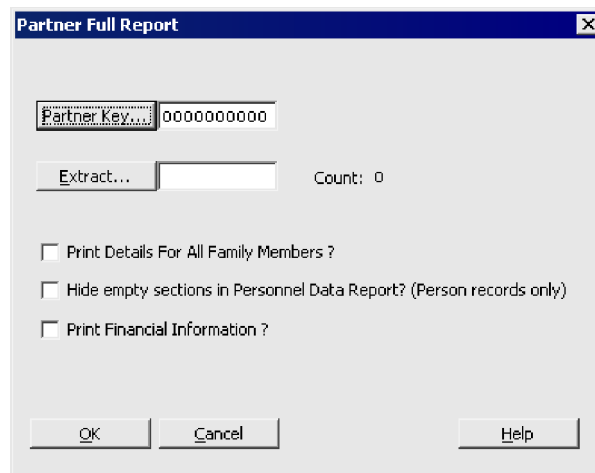


Figure 9-1 Partner Full Report Box

2. Select the options you want:

Partner Key if you want to print the report for a single partner, enter their key here, or choose the **Partner Key** button to bring up the *Partner Find Screen*.

Extract if you want to print it for all the partners in a particular extract, enter the name of the extract here, or choose the **Extract** button to bring up the *Extract Master Find Screen*.

Note printing the full report for an extract of partners can take a very long time.

Print Details For Family Members tick this if you want the details of all Person records attached to the Family you have chosen.

Hide empty sections tick this if you are printing a Person record and only want to see the parts of the Personnel Data Report that actually contain data.

Print Financial Information tick this if you want all financial details such as gifts.

3. Choose **OK**.

9.2 Expired Addresses

The Expired Addresses report has been dealt with in ‘Housekeeping’ on page 43. Tick the ‘Show Report Only’ box if you only want the report.

9.3 Tables Print

This is a report of all the tables in the database, with a brief description and listing the level of access that the groups and users have to them. To run it, select `Security` and `Tables Print` from the *System Manager Screen*.

9.4 Current Users

To see a list of who is currently logged in to PETRA, select `Security` and `View Current Users` from the *System Manager Screen*.

This report can be misleading, because it lists everyone who has logged on, but not logged off. If a user does not log off properly, for example because their computer crashed, they will still be listed here. To remove old entries, purge the Logins Log as below.

On a network, a more reliable way to see who is logged in is to log in to your server as `root` and choose the `ConnectedClients` option from the `sysadm petra22` screen.

9.5 Logins Log

The Logins Log is a list of everyone who has logged in, or tried to log in, to PETRA. If you get a lot of failed login attempts, it may be a sign that someone is trying to break in.

1. From the *System Manager Screen*, select `Security` and `View Logins Log`.

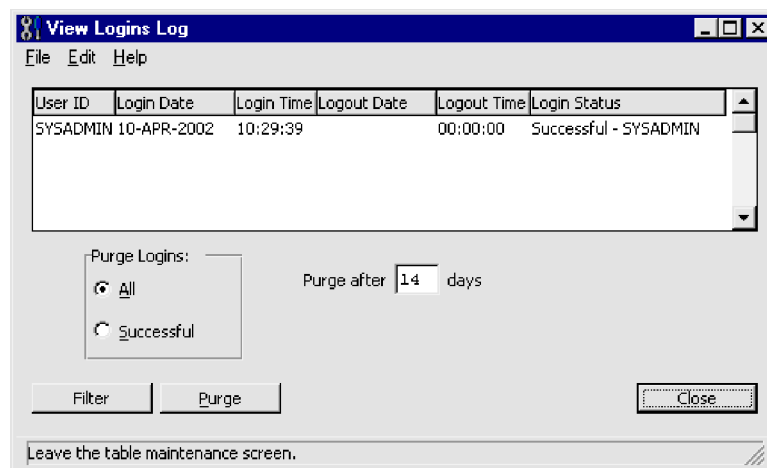


Figure 9-2 View Logins Log Screen

2. Choose `Filter` to view all the logins of a particular user, or between certain dates.
3. To manually purge the log, enter the number of days you want to keep, select `All` if you want to purge all entries older than this or `Successful` if you want to keep the invalid entries even if they are older, then choose `Purge`.

9.6 Error Log

The error log lists certain PETRA errors that have occurred.

1. From the *System Manager Screen*, select `Security` and `View Error Log`.
2. Again, you can filter the log by user or by date with the `Filter` button.
3. To purge the log, enter the number of days you want to keep, and choose `Purge`.

9.7 Report File Log

This shows all reports that are available to be reprinted, when they were printed, who printed them, and the report file name. You can find these files in the `tmp` directory (see 'Chapter 7 Housekeeping'). If the report file name starts with 'arc/' then the report has been archived and its files will be found in the `arc` directory.

1. From the *System Manager Screen*, select `Print Management` and `View Report Files`.
2. To reprint a report, choose the `Print` button.
3. To purge a single report, highlight the report, choose `Selected Report` and `Purge`. To purge old reports, select `Purge after` and enter the number of days you wish to keep, then choose `Purge`.
4. To set up the reports that you want to be archived instead of deleted, select `Archiving and Reports to Archive` from the menu (see 'Housekeeping').

9.8 Database Log

There are two logs of database activity kept outside of PETRA. To view them on a Network system:

1. Log in to Linux as `root`.
2. Type `sysadm petra22` and choose `Administration`.
3. Choose `ViewProgress` or `ViewPetraServer`.

----- End of Chapter 9 -----

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Chapter 10 ODBC

ODBC stands for Open DataBase Connectivity. It provides a standard way for programs to connect to databases. ODBC comes in two halves: driver and server. A program like Microsoft Access or Crystal Reports will use the ODBC driver to connect to the ODBC server and get data from PETRA.

10.1 ODBC Server

On Network versions, the ODBC server is started and shut down as part of PETRA, and you can use both PETRA and an ODBC program at the same time.

On Standalone versions, you can also use both at the same time, but you can also manually start the ODBC server when you want to use an ODBC program without running PETRA, and stop it when you have finished. This was discussed in detail in 'Startup and Shutdown' on page 37.

10.2 ODBC Driver

The ODBC driver was installed and configured when you installed PETRA. If you need to recreate or reconfigure it for any reason, follow these steps:

1. Open the Windows Start Menu and choose Settings ► Control Panel.
2. Choose Administrative Tools ► Data Sources (ODBC). When the ODBC Data Source Administrator appears, click the System tab.

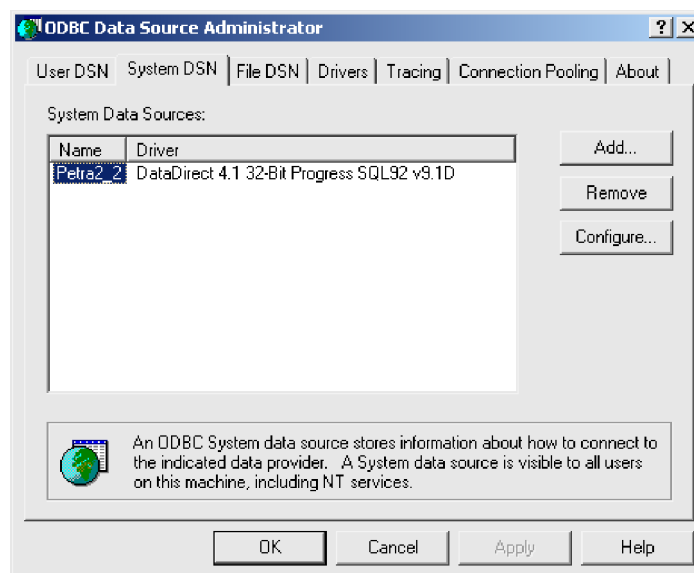


Figure 10-1 ODBC Data Source Administrator

3. Choose Add or Configure. When the Create New Data Source window appears, highlight DataDirect 4.1 32-Bit Progress SQL92 v9.1D and choose Finish. The ODBC Progress SQL92 Driver Setup window appears.

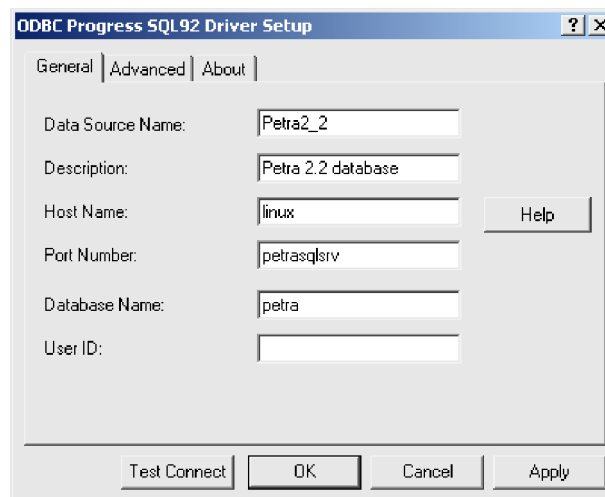


Figure 10-2 ODBC Progress SQL92 Driver Setup

Enter the fields as shown. For the Network version, **Host Name** should be the name of your server (usually `linux`) and **Port Number** should be `petrasqlsrv`. For a Standalone, **Host Name** should be `localhost` and **Port Number** should be `petrasqlsrv`.

4. Choose **OK**.

Each user needs their own User ID and password. These are different from the normal PETRA User ID's, and are administered using the separate ODBC User Manager program. This can run from **Start ► Programs ► Petra 2.2 ► ODBC User Manager**. The instructions are in the ODBC User Manager Manual, which is part of the online help within PETRA.

----- End of Chapter 10 -----

Chapter 11 Troubleshooting

If you have trouble with PETRA, the first person you should contact is your AITA. If your AITA cannot help, or if you *are* the AITA, you should email full details of your question or problem to petra-support@ict-software.org, including the version of PETRA and whether it is Network or Standalone. Please also say if you need a secure reply.

Here are some common questions and their answers:

Why must I use petra-support@ict-software.org instead of the helpful person who answered my last question?

There are 3 reasons for this. If you send an email to one person, they may:

1. Not be able to answer, and have to waste time forwarding it to the correct person.
2. Be away on holiday, conference or campaign. You could wait weeks for an answer.
3. Have left the organisation. You may not get an answer at all.

When you send to [petra-support](mailto:petra-support@ict-software.org), everyone on the Development Team sees it, so you *know* it has gone to the right person.

What is the SYSADMIN password?

It is given in the installation documentation on your CD. We want to list it in as few places as possible for security reasons.

I can't log in! PETRA says 'Invalid User ID/Password' but I'm sure I typed them correctly.

Check that the keyboard Caps Lock is turned off. Remember that passwords are case sensitive.

I'm trying to create a user, and I'm getting an error 'You have given this user access to FINANCE but not to any ledgers'.

This is not an error, it is just a reminder message. You can still close the *User Maintenance Screen* by choosing *Yes*. The user will still be able to run Petra, and create their own ledger if they are a member of the FINANCE-3 group. They will not be able to use any existing ledgers, though, and must *Cancel* from the *Select Ledger Box* if it appears when they enter Finance.

When I print labels, the margins are wrong and the addresses print off the labels.

You have probably selected the wrong form on the *Start Print Job Screen*. Select the form defined for these labels. If you are selecting the correct form, check that the margins are correct on the *Form Maintenance Screen*.

I'm trying to print using a particular form, but it does not appear on the *Start Print Job Screen*.

The form has not been assigned to the module you are printing from. See 'Assigning a Form to a Module' on page 29.

----- End of Chapter 11 -----

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Chapter 12 Advanced Configuration

There are some extra configuration options that can be set to change PETRA's behaviour. Most of the time these options do not need to be changed.

12.1 Automatic Detection of User ID

PETRA detects the ID of the user logged in to Windows, and automatically fills in the User ID on the Petra Login screen to match. On standalone systems where a default Windows user name is used, or on network systems where the network User IDs do not match the Petra ones, this is not always appropriate. To prevent PETRA from filling in the User ID, edit the file `C:\Petra2\ClientStandalone.config` (standalone) or `/usr/local/samba/app/Programs/Petra2/PetraClientNetwork.config` (network). Find the line

```
<add key="UseWindowsUserID" value="true" />
```

and change it to

```
<add key="UseWindowsUserID" value="false" />
```

12.2 Email Program

PETRA will normally be able to detect the email program you have installed but there are circumstances when it may not be able to do so. These include Pegasus Mail being run from the network F: drive without the installation program being run on the local computer. To tell PETRA where to find Pegasus, edit `/usr/local/samba/app/Programs/Petra2/petra22.ini` (network) or `C:\Petra2\petra22.ini` (standalone). Find the section called `[Petra]` and add an item

```
PegasusDir=f:\win95\pmail
```

pointing to the folder where Pegasus should be run from.

If you have Pegasus installed but want PETRA to try to use a MAPI-compliant email program instead (like Microsoft Word does), you can set

```
PegasusDir=MAPI
```

which causes PETRA to ignore Pegasus even if it does detect it. PETRA does not need to be restarted after changing this parameter.

12.3 Number Format

When you installed PETRA you chose language and country settings, which included the format of numbers: whether to write one thousand point zero one in the American format of 1,000.01 or the European format of 1.000,01.

If you find that the number format you are using is not suitable, you can change it by editing `/usr/local/samba/app/Programs/Progress/startup.pf` and `/usr/local/progress/startup.pf` (network) or `C:\Program Files\Progress\startup.pf` (standalone). Network users need to edit two files, one for the client and one for the server. In either case, there are two parameters that control the number format: `-numsep` controls the thousands separator, and `-numdec` controls the decimal character. Set them to the ASCII codes of the characters you want as shown in the table below, and restart PETRA.

American Format 1,000.01	European Format 1.000,01
-numsep 44 -numdec 46	-numsep 46 -numdec 44

12.4 Number of Licensed Users

This section is only relevant for network users. You can see the number of users you are licensed for on the `sysadm petra22admin` screen. To change it, select the `ChangeLicense` option. You must have purchased the correct number of licenses through petra-admin@ict-software.org before changing this.

After setting this option, you need to restart PETRA using `sysadm`.

12.5 Watchdog Process

The network version of PETRA runs an extra process, called the *watchdog*. This is supposed to tidy things up in the event of a server process crashing (it does not help with workstation crashes).

Unfortunately, it takes up one licensed user slot. If necessary, it can be disabled by commenting out the line beginning `$DLC/bin/prowdog` in `/etc/rc.d/init.d/petra22proserve` and restarting PETRA.

12.6 Website

If you need to use a web proxy server instead of the normal PETRA website, change the `Website` line in `/usr/local/samba/app/Programs/Petra2/petra22.ini` (network) or `C:\Petra2\petra22.ini` (standalone).

----- End of Chapter 12 -----

Index to System Manager Guide

Tip If using Adobe Reader to view online, you can jump to the page. Find the item in the index, click in the page number box on the toolbar, type in the page number you want, and press [Return]. This takes you immediately to the page.



- Acquisition Code, 22
- Address
 - Address Match Level, 12
 - labels, 8, 12
- arc directory, 46, 53
- Batch Jobs, 43
- Character Spacing, 28
- Characters per Inch, 28, 32
- Columns between labels, 32
- ConnectedClients, 36, 52
- Country, 12
- Date format, 13
- Delete System Records, 21
- delete users, 23
- Duplicate Address Check, 12
- export directory, 46
- Extract, 51
- Family Name, 21
- Finance-1, 19
- Finance-3, 19, 57
- forms, 8, 57
 - Form Description, 28
 - Form Name, 28, 32
- Gap Labels, 12
- Gift Info Display, 13
- GL Reference, 13
- GUEST, 19
- Height in Lines, 32
- Housekeeping, 7, 8
- Label
 - Code, 32
 - Description, 32
- Language Code, 14, 15, 21
- Ledger
 - Department, 17
 - Number, 22
 - Regional Office, 16
- Ledger security
 - group, 23, 24
 - user, 23, 57
- Lines between labels, 32
- Lines per Inch, 28, 32
- Localised County Label, 12
- Mailsort
 - Program, 12

- Threshold, 12
- Margins, 27, 28, 57
- Module List Screen, 19
- Month names, 13
- Number format, 59
- Number of labels across, 32
- Number of labels down, 32
- ODBC User Manager, 56
- Orientation, 28
- Paper Size, 28
- paper tray, 8, 33
- Partner
 - address, 45
 - Key, 12, 16, 17
 - Partner Edit Screen, 12
 - Partner Full Report, 8, 51
 - Partner Key, 51
- password, 19, 22, 24, 57
- patches, 41
- Patches, 9
- Pegasus Mail Directory, 59
- Personal Name, 21
- petra.bak, 39
- petra.lk, 37
- petra-info, 49
- petra-support@ict-software.org, 57
- Print Details For Family Members, 51
- Print Financial Information, 51
- Purge
 - Error Log, 43, 53
 - Expired Addresses, 8
 - Extracts, 43
 - Logins Log, 43, 52
 - Report Files, 43, 53
- Receipt Each Gift, 13
- Receipt Letter Frequency, 13
- reminders, 17
- Reports, 12
 - purge, 8
 - Report Banner, 13
 - Report File Name, 44
 - Report Title, 45
- Run command, 8
- Show Report Only, 46
- Site Key, 12, 16
 - removing Sites, 11
- support. *See* petra-support@ict-software.org
- SYSADMIN, 19
 - password, 7, 57
 - user, 7
- System Manager Screen, 7
- tmp directory, 46, 50, 53
- Unit of Measure, 28
- User ID, 19, 21, 57
 - Windows, 59
- User Maintenance, 7
- Users, number of, 60
- Wdog process, 60
- Width in Characters, 32

