

DRIVING THE SOFTWARE

Here are a few notes on how to use the software which you may find useful as you start to navigate your way around.

- From any screen you can access help by clicking on the ? at the top right.
- All screens can be driven by using the mouse or the keyboard.
- The package is menu driven. A single click on a menu selection will take you to the program. When in the program, the 'Exit' button will take you back to the menu.
- The database is NOT updated from any program until the 'Record' button is pressed. There is always a 'Cancel' button displayed alongside the 'Record' button that allows you to abort the current input.

Using * and ^ in Grids

Type*	A/c	Fund	Reference	Audit	Value(£)*	D*	Comment	*
Don		EA-CR	helenbrown		50.00		Donation booking	
MT#		EA-CR	helenbrown		20.00		Manou transfer	

- An asterisk (*) in a grid column header indicates that extra information can be displayed via a 'double click' in that column for the appropriate grid entry.
- Similarly, a '^' symbol indicates that a 'right click' will display further selections.

The Navigation Bar



- These navigation controls will appear at the top right of the screen in many of the maintenance and enquiry programs.
- Clicking on the up arrow will select the first record in the group, left arrow the previous record, right arrow the next record and down arrow the last record in the group.
- Where available, the large 'C' icon will display a record count.

The programs in the package are split into four types: **Maintenance, Inputs, Enquiries and Reports.**

Maintenance Programs

These programs are used for adding and maintaining the basic elements of the system and are consistent in the way they are driven. An example is Donor Maintenance.

To ADD a new element e.g. a donor: in the Donor Maintenance program, press the Add button, complete the required fields (mandatory entries are marked with an asterisk) and press Record when complete.

To UPDATE an existing element e.g. a donor record: in the Donor Maintenance program, search and select the required donor record, press the Update button, complete the required amendments and press Record when complete.

To DELETE an existing element e.g. a donor record: in the Donor Maintenance program, search and select the required donor record, press the Delete button, you will be asked to confirm that you really mean to delete the record and, if so, the record is deleted. Note that numerous checks are made by the system to ensure that you are allowed to delete the record.

Input Programs

These programs are used to enter transaction data, for example Receipt Input, Payment Input, Gift Aid Donations.

The entry screens are normally split into a header with normal entry fields at the top and a grid in the lower section of the screen for the entry of the detail lines. Mandatory entries are marked with an asterisk.

Movement around the grid section is via the mouse or the up, down, left and right arrow keys (similar to a spreadsheet).

Enquiry and Report Programs

These are fairly self explanatory. See below for a list of the report program search controls.

Don't forget, you are not going to update the database using these programs and so you can experiment with confidence. (Suggest that you start by using Preview rather than Print for reports.)

There are many reports included in the software.

All the reports allow you to enter criteria to determine what information is displayed. Where the field has a * it means that a selection needs to be made. There are a number of different options in the operator field. Here is an explanation of each one:-

any value all the records are selected.

between a pair of values must be entered as the start and end values for a range to be selected. The range between "A" and "CZZZZ" would produce a list of records with first character in the range A to CZZZZ [inclusive].

not between as above, except that records other than those in the range are selected.

like enables matching using the first character of a code or with the wildcards "%" and "?". The value A% would produce a list of all records starting with the letter "A". ?A% produces a list of items where the second character is "A".

not like as above, except that records other than those specified are selected.

= equal to, an exact match.

<> not equal to.

> / < greater than (a numeric value), or later (alphabetically or date wise) or less than (a numeric value), or earlier (alphabetically or date wise)

>= / <= greater than or equal to/ less than or equal to.