SVdP Database Tutorial

This document is now under development. It is usable as is, but you will occasionally see a reference to St Elizabeth Ann Seton. The reason is this document was originally written for SEAS. It is being modified for St. Patrick's.

Introduction

The SVdP database is an Internet based application that can be used to manage the data and processes associated with a SVdP conference. Some of this data is sensitive, so all transactions are secure. The database is backed up every night in case there is a hard disk failure on the server. Using the Internet gives access 24/7 to anyone anywhere in the world – as long as they are authorized to access the data.

In general there is a base record for each entity (client, member, apartment, conference) and there are history records to keep track of clients who need help more than one time (one history record for each time the client is helped). There are also records to keep track of meeting minutes, schedule, volunteer hours / miles or food distribution.

There are now 13 conferences using this database, and each conference is very different. Some of the conferences even have displays that are different because their process is different. This document uses the word "client" for a person being helped; some conferences prefer neighbor or friend. Each conference has its own database, but all use the same server. The software is free, but there is a small charge to pay for the use of the server.

When using the database, you will find a lot of fields that St. Patrick's does not use. That is because the screens are shared with so many different conferences.

The Home Page

To get into the St. Patrick's database, the first thing you must do is go to the home page. The address of the home page is https://parishplus.com/StPatrick/SVdP/web.htm. The home page is unique for St. Patricks, unlike most of the other pages we will look at in this tutorial. There is a lot of information on the home page, but since this is a tutorial on the database, we will only look at the database section:

Database	
Enter SVdP Database	Enter the St. Patrick SVdP Database (Password Required)
File Upload	Transfer file from PC to Web site (Restricted)
Database tutorial	Tutorial in PDF format

Enter SVdP Database. This is used to actually enter the database to either just look at the records therein, or to actually add and/or update the data. All users must have a password. When the password is assigned, it is associated with a level of access:

- **Read Only**. This level allows the user to look at the data but not change anything. The database is protected from this user.
- **Modify:** This level allows the user to add/update any data in the database.
- **Owner:** Also called **Admin**. This level allows the user to set up passwords; to make modifications to the appearance of some of the screens; and to actually create some reports.

File Upload. This is used to load non-database files to the ParishPlus server. For example, the home page is uploaded with this function. Another example is the minutes of chapter meetings. This access is restricted.

Database Tutorial. This is the file you are reading. This file has been done in Word, saved as a .PDF and uploaded with the file upload function.

Logging In

When you want to use the database, the first thing you do is log onto the home page as described above. You then select **Enter SVdP Database** by clicking the link.

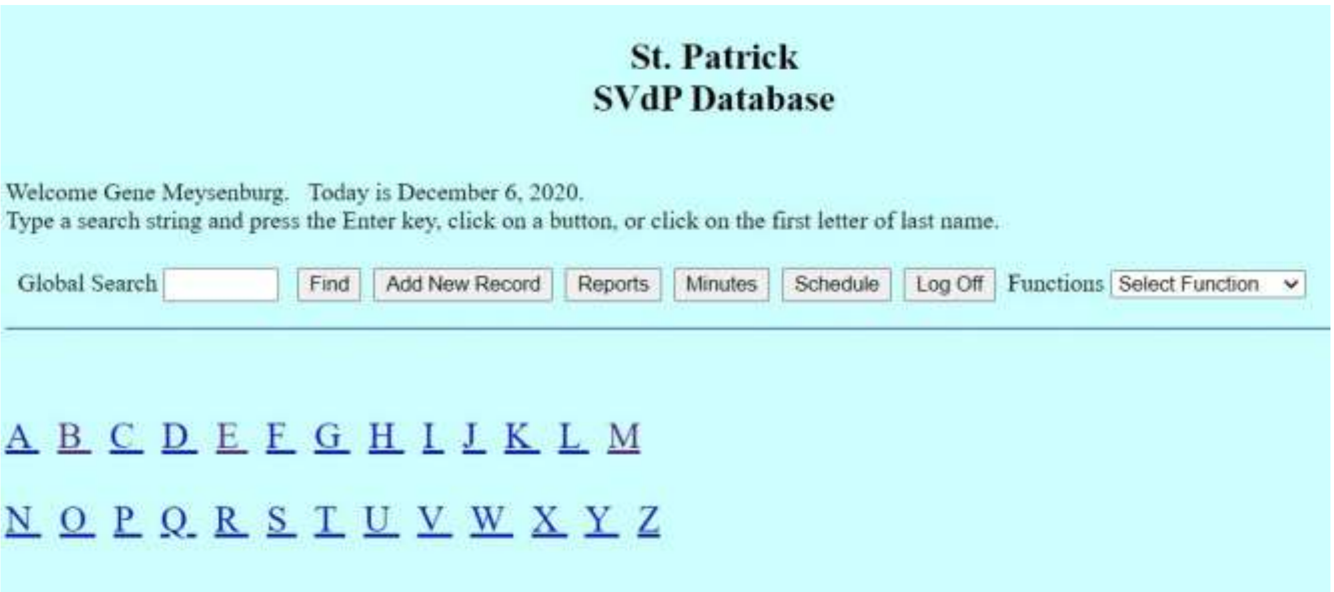
When you first run the database program, the screen that is displayed is a log in form.

Enter your name and the password assigned to you, and click on the "**Submit Password**" button. A record with the name of the member is required in the database before the member can log in. The passwords are assigned by the database admins. Both fields are case sensitive and the name must match the name in the record. Bill Goodmember is not the same as William Goodmember or even bill goodmember. If the password is correct, a cookie is stored on your device. What this means is that you will not have to log on again from this computer or phone. This is fine if your machine is secured like at your home. However, if you have a portable machine like a laptop or phone and you lose it, the finder will have access to the database. On these machines, you must log off.

Also, if you are using a machine at the SVdP office, you must log off or the next user will be logged on under your member name.

Once you get successfully longed on, the next screen displayed is called the "A to Z" screen.

"A to Z" Screen



When you log on, this is the first screen you will see.

The buttons on the top are used to navigate to the functions you want to run. The letters are used to quickly get to the base records if you know the last name.

Global search – searches all the records (base records as well as history records) for a string.
Find – Find a record by last name, first name, phone number, record number or case number
Add New Record – used to add a record to the database
Reports – Displays a list of the available reports, one button per report
Minutes – Contains links to the minutes of Conference meetings
Schedule – Currently not used at St. Patrick's
Log Off – This button is used to log off the database.
Functions – drop down with other options

The contents of the Functions drop down (for St. Patrick's) are the following:

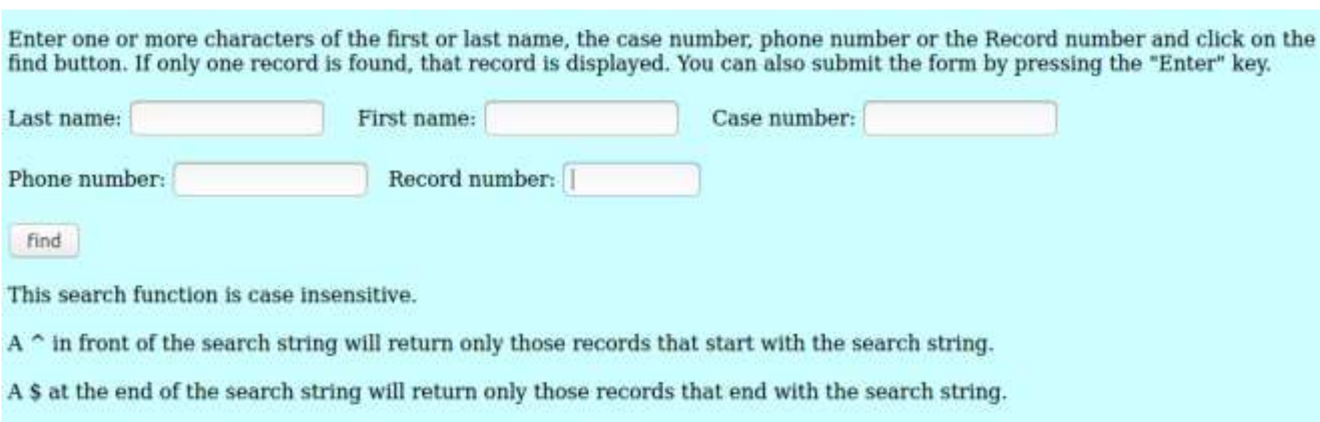
- **Home** - links to the A to Z screen
- **Display All** – display all records
- **Search / Email** – search base records & email function
- **Search History** – search history records
- **Help Form** – process online help requests
- **Find Dup. Records**- find duplicate records
- **Help** – online help function
- **Merge Records** – merge two records
- **Undelete Record** – undelete a record that has been deleted
- **Help** – General help function. Applies to all conferences
- **Web page** – display conference SVdP page
- **Council map** – display the council map

Global Search

The Global search is a fast way to find a record if you know something reasonably unique about the record you are looking for. Part of the last name or phone number are examples. But a search for something like "rent" would return a list of any record with rent in it – way too many records to be useful.

Find

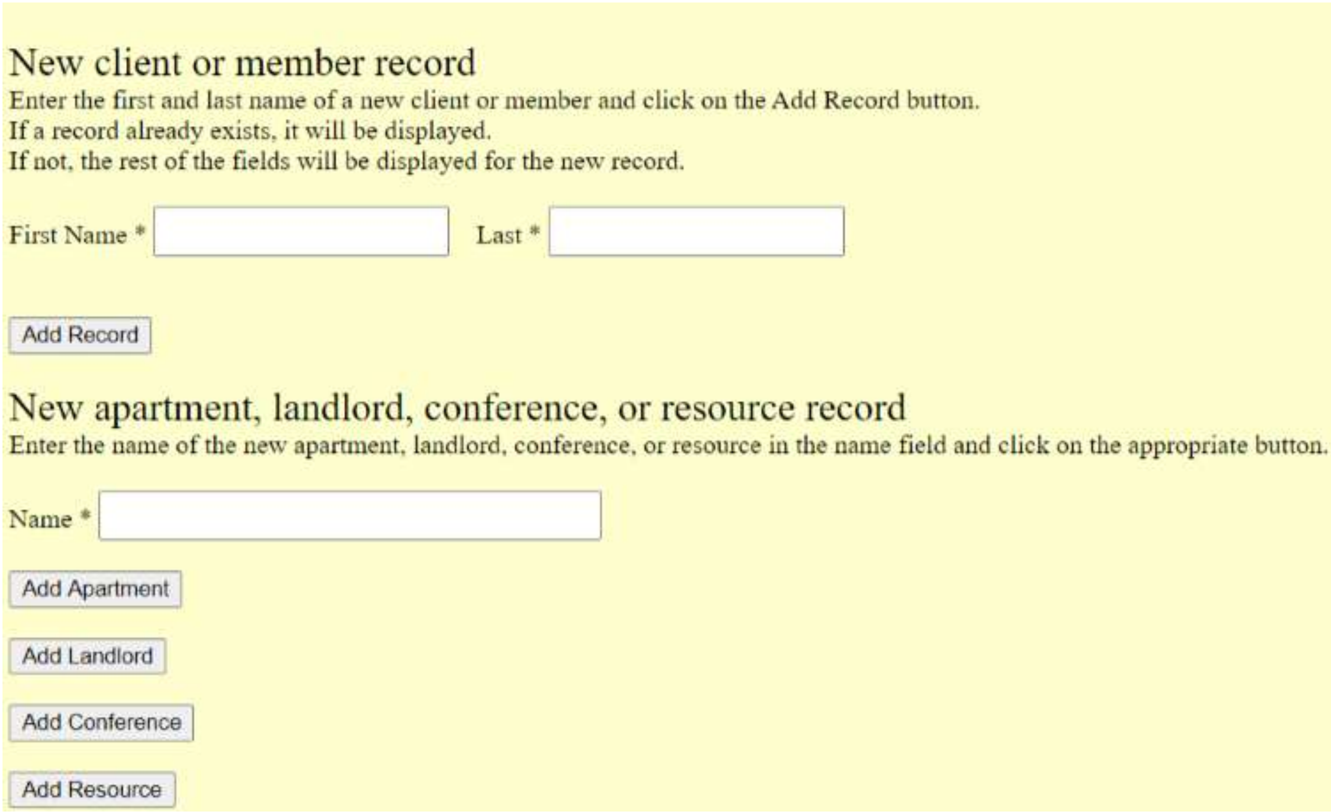
This is a fast way to find a record by record number, last name, first name, phone number or case number. Find by record number only works on the primary records (it does not find history records).



Add New Record

Two Functions**:**

1) Client or Member Record: To add a new record, enter the first and last name and click on the Save New Record button. If the client record already exists, a different display is displayed. If not, a new record is generated and the display is in edit mode to enter additional data.
2) For new apartment, Landlord, Conference or Resource records, enter the name in the Name field and click on the appropriate button.


New client or member record

Enter the first and last name of a new client or member and click on the Add Record button.
If a record already exists, it will be displayed.
If not, the rest of the fields will be displayed for the new record.

First Name * Last *

Add Record

New apartment, landlord, conference, or resource record

Enter the name of the new apartment, landlord, conference, or resource in the name field and click on the appropriate button.

Name *

Add Apartment

Add Landlord

Add Conference

Add Resource

If the client has the same name, it is probably best to add a number after the last name like Lopez 2. That way a search for Lopez [last name] will display both records and additional information so the correct record can be selected; however, the database will allow two client records with the same name.

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Starting here, the tutorial needs updating. Some of the discussion is not applicable to St. Pats
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Reports

The Report function displays a list of reports that are available. Click on the report to run it. The owner of the database can add reports or edit existing reports. There is also a special report that facilitates communication to all the members.

Office Schedule – Displays the current member schedule for this week.
Aid Report – Not used.
Aid Report2 – This report lists by date the clients who received our help, and the help we provided.
Apartment / Client – This report displays the apartment names and the record number of the clients who live in each apartment house.
Apartment Summary – Displays the apartments and the amount we have paid them during a selected time frame.
Case Report – Not used.
Donor Report – Not used.
Interview Report – Not used.
Volunteer Report – Not used.
All Members – Displays the list of all the St. Patrick's members.
Export Client List – A list of all the clients on the database.
Apartment Report – A list of all the apartments in our apartment file.
Housing Payment Log – A list of all clients and the housing payments made to each one.
Financial Activity Log – A list of the activity on each client on the database.

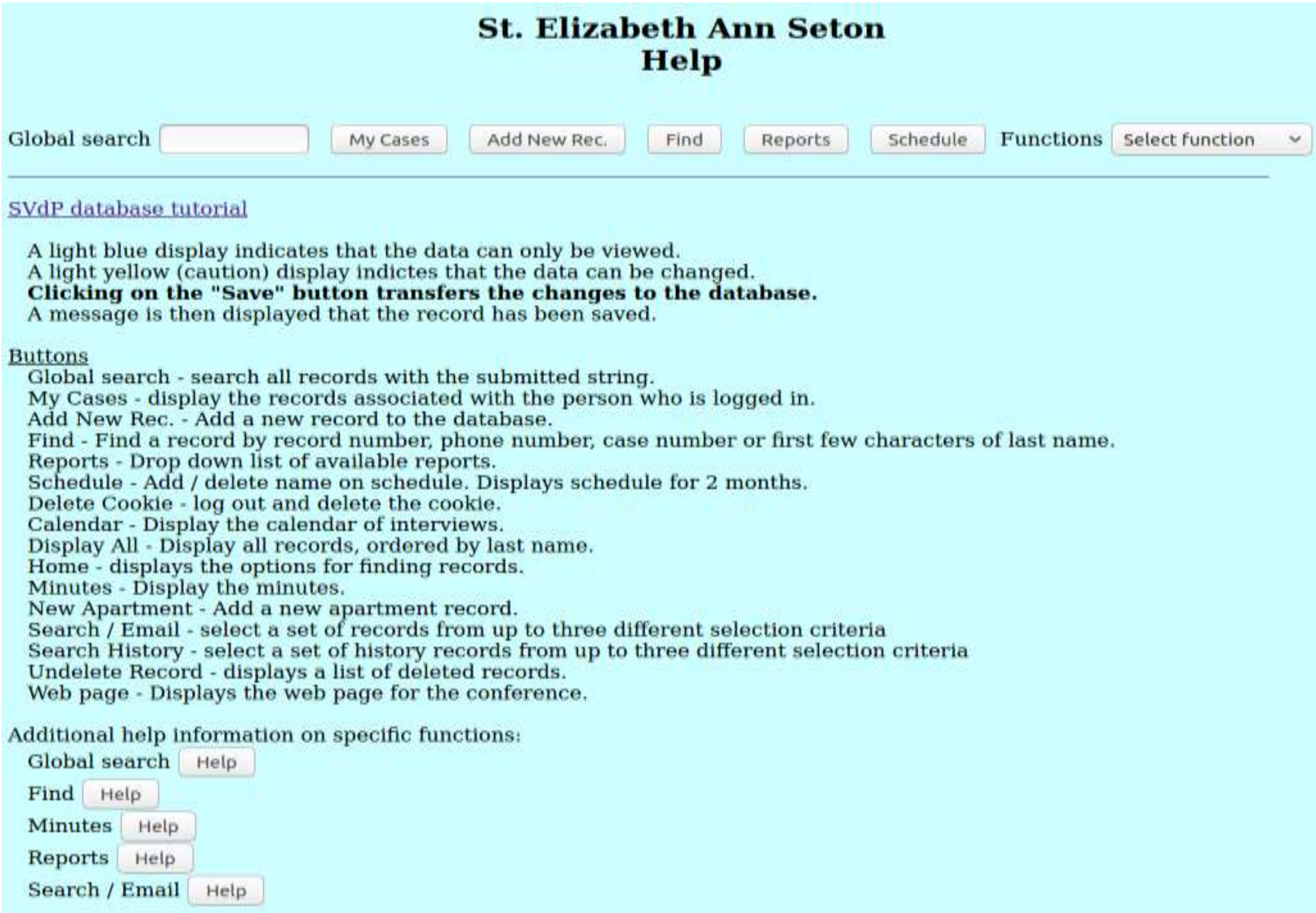
Schedule

The schedule function allows a member to view the schedule or to sign up for a role or to delete the sign up for a role. If a role is available, clicking on the number will sign up the member. Clicking on the number again will delete the sign up. Clicking on the name will display the record for that member. The schedule is displayed for two months, the current month and the next month.

The schedule function is not used by St. Patrick's at this time.

Display All
Displays all the records. Some members like to use this display and then use the Ctrl F key to search for the record they want.
Help
Displays a help screen. The "Help" button is context sensitive – the help displayed depends on which

function you are in. The first part is displayed below:


St. Elizabeth Ann Seton
Help

Global search [ ] My Cases | Add New Rec. | Find | Reports | Schedule | Functions | Select function

SVdP database tutorial

A light blue display indicates that the data can only be viewed.
A light yellow (caution) display indictes that the data can be changed.
Clicking on the "Save" button transfers the changes to the database.
A message is then displayed that the record has been saved.

Buttons
Global search - search all records with the submitted string.
My Cases - display the records associated with the person who is logged in.
Add New Rec. - Add a new record to the database.
Find - Find a record by record number, phone number, case number or first few characters of last name.
Reports - Drop down list of available reports.
Schedule - Add / delete name on schedule. Displays schedule for 2 months.
Delete Cookie - log out and delete the cookie.
Calendar - Display the calendar of interviews.
Display All - Display all records, ordered by last name.
Home - displays the options for finding records.
Minutes - Display the minutes.
New Apartment - Add a new apartment record.
Search / Email - select a set of records from up to three different selection criteria
Search History - select a set of history records from up to three different selection criteria
Undelete Record - displays a list of deleted records.
Web page - Displays the web page for the conference.

Additional help information on specific functions:
Global search Help
Find Help
Minutes Help
Reports Help
Search / Email Help

Search / Email

The search function selects a set of records based on one to three criteria and can be used to send email to the people whose records have been selected.

Example:

field	comparison	value
Status	=	Member

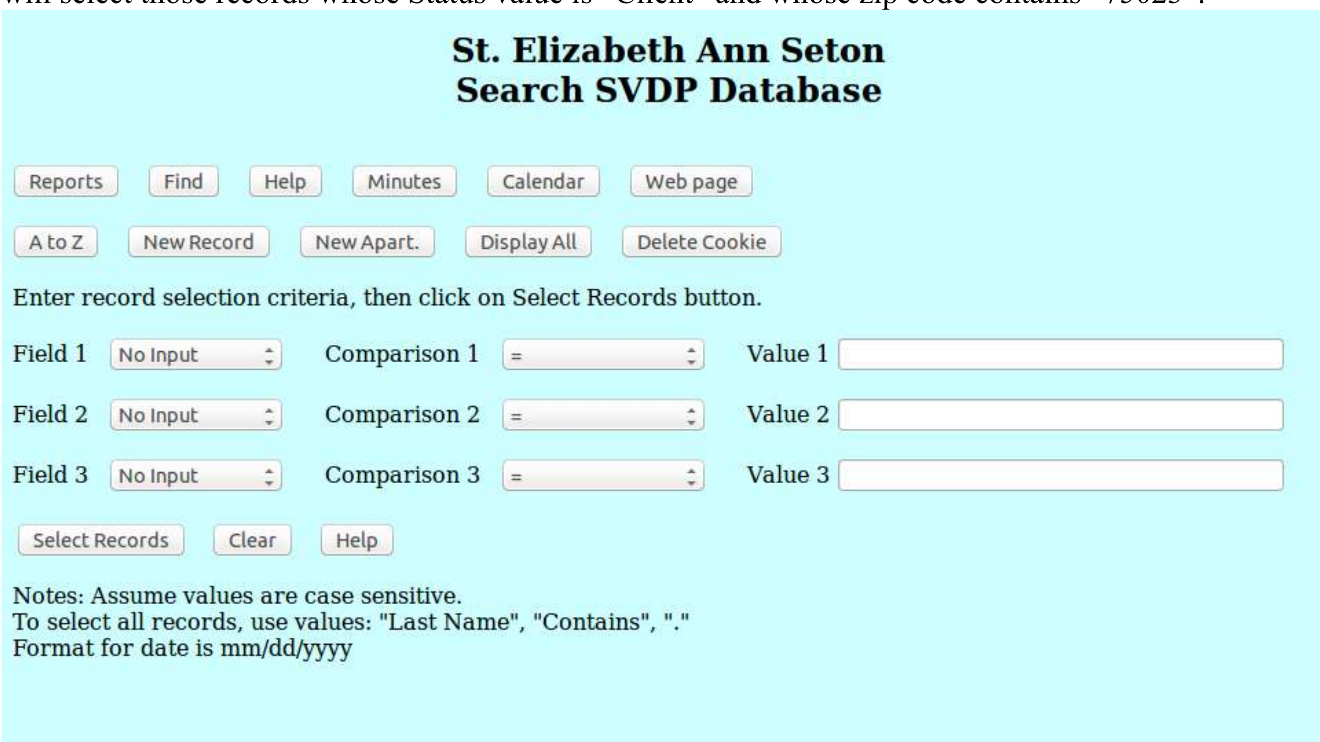
will select those records whose status value is “Member”. This is useful for the secretary to send out a message that the minutes are ready to be reviewed.

Each record that s selected has a checkbox. The checkbox value is checked if that record has an email address and not checked if there is no email address. The checkboxes can be clicked on or off to select or deselect a record.

Example 2:

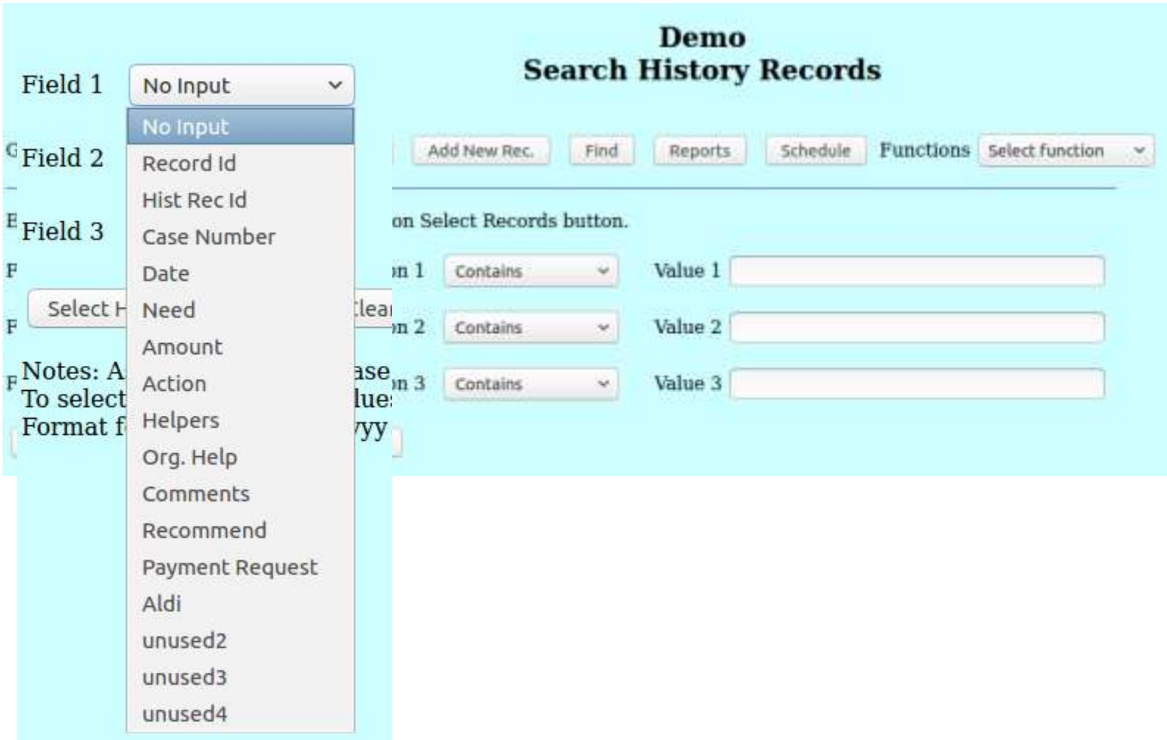
field	comparison	value
Status	=	Client
ZIP	Contains	75023

will select those records whose Status value is “Client” and whose zip code contains “75023”.



Search History

The search history function works like the Search / Email function but on the contents of the history records.



Merge Records
The merge records function can be used to merge two records. The record numbers are used to select the two records to be merged. Normally the user would then delete the source record.

Find Dup. Records
This function lists the records that have the same name.
Minutes
The minutes from the most recent 4 meetings are displayed. If other minutes are desired, the user can select the year and month or quarter, then click on the Display Minutes button. Anyone can add minutes, but only a database owner can edit them.

Web page
This button displays the SVdP web page. This page would contain links to other sites, documents like the SVdP process or resource books, and current information like meeting results. The contents are managed by the conference.

St. Elizabeth Ann Seton
SVdP Web Page

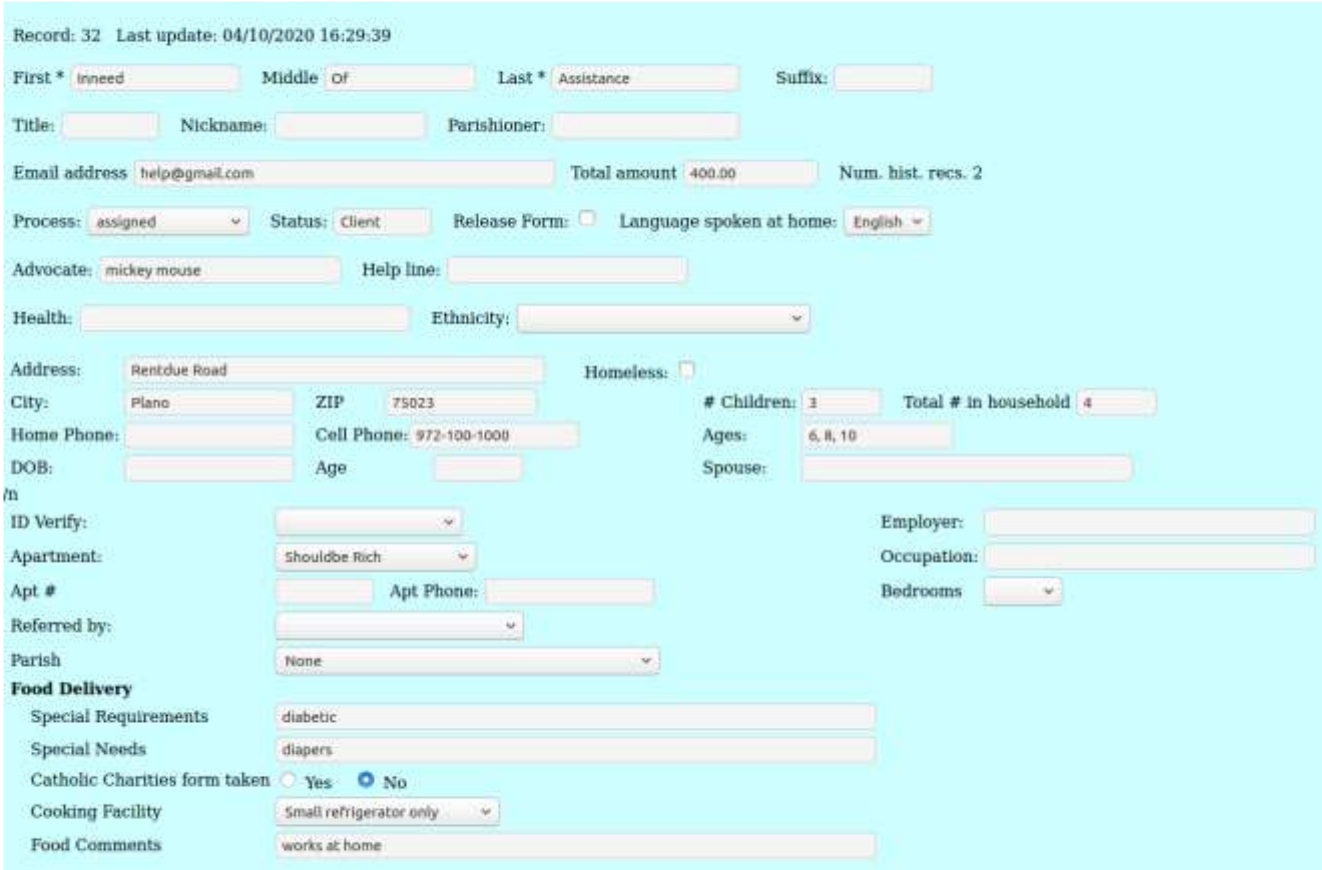
Help Line 972-648-7207

Other web pages	
St. Elizabeth Ann Seton	parish web site
SVDP Frederic's E-Gazette	web address of E-Gazette
Dallas Conference Map	Dallas Conference map
MLP web page	Mini Loan Program web page
Database	
SVDP database - member	SVDP database for members
SVDP database - owner	SVDP database for owners
File Upload	Transfer file from PC to Web site
FileShare	Share the file
Database tutorial	Tutorial in PDF format
Meeting	
Weekly Meeting	Agenda, report, client review in PDF format
Client Summary Spreadsheet	Client summary in xlsx format
Resources	
Picture Directory	Password protected
Resource Book	SEAS Resource Book in PDF format
Assistance Center of Collin County	Assistance Center of CC in PDF format
Additional Resources 1	Additional resources in PDF format
Additional Resources 2	Additional resources in PDF format
Samaritan Inn	clients can call: 972-632-1290 ext 231 between 10:00 am and 1:00 pm
Financial Assistance Resources	Financial Assistance Resources in PDF format
Food Resources	Food resources in PDF format

Client Record
To modify any base record you must first click on the button “Modify”. You can modify the record and then click on the “Save” button. **If you forget to click on the “Save” button your modifications will not be saved in the database.**
The record functions, conference dependent, may include the following:

Modify – click this button to modify this record (edit mode).
Delete – mark the record as deleted [does not delete the record]
Attach file – attach a file to this record
Transfer History – transfer history records to a different client record.
Print – print this page
Intake – conference dependent
Online form - conference dependent
Add food record – add a food record to this record
Prev Rec. - display the previous record
Next Rec. - display the next record
Send ER – send an emergency request message to the officers (conference dependent).

When you are in an existing record, you can attach a file to that record. This is very useful in storing the client Release form. You would scan it in and attach it to the client record.
Click on Choose File and navigate to where the file is located. Then enter a description (example: Release form), then click on the “Upload File” button.
There are many fields for a base record. The only required data is first and last name. The base record has 4 conference definable fields.



Record: 32 Last update: 04/10/2020 16:29:39

First * Inneed Middle Of Last * Assistance Suffix:

Title: Nickname: Parishioner:

Email address help@gmail.com Total amount 400.00 Num. hist. recs. 2

Process: assigned Status: Client Release Form: Language spoken at home: English

Advocate: mickey mouse Help line:

Health: Ethnicity:

Address: Rentdue Road Homeless:

City: Plano ZIP 75023 # Children: 3 Total # in household 4

Home Phone: Cell Phone: 972-100-1000 Ages: 6, 8, 10

DOB: Age Spouse:

/n

ID Verify: Employer:

Apartment: Shouldbe Rich Occupation:

Apt # Apt Phone: Bedrooms

Referred by:

Parish None

Food Delivery

Special Requirements diabetic

Special Needs diapers

Catholic Charities form taken Yes No

Cooking Facility Small refrigerator only

Food Comments works at home

Note that the number of history records (2) and the total amount of aid is summarized on the line with the email address. This helps if the conference has defined limits. For the amount to be correct, the amount in each history record must be correct.

Rest of client record.

All income and expenses are monthly.

Income (0)		Expenses (0)	
Wages		Rent/Mortgage	
TANF		Food	
Food Stamps		Electricity	
Vet. Benefits		Water	
SSI / SSDI		Gas	
Worker's Comp		Telephone	
Child Support		Health Insurance	
Medical / CHIP		Car Payment / Insurance	
WIC		Gasoline	
Subsidized Housing		Medical Bills / Prescriptions	
Other		Child Care / School	
		Credit cards / Loans	
		Other / Internet / Cable	

Help line comments

Need Rent Assistance Now
02/22/2018 10:22:47 - Help_678.txt

SCOR

The base record is followed by the Food records and the History records. For the Demo database, someone defined one of the definable fields SCOR. It is a text field with up to 255 characters.

Food Report Add Food Record

Record ID	5 Modify Record Delete Record Generated on 04/07/2020, Last updated on 04/08/2020
Requested Date	04/06/2010
Date Delivered	
Delivered By	John Medaille
Number of Boxes	2
TEFAP signed	No

History Record

Each client record should have only one base record, but should have a history record for each time they made a request.

A history record can be modified, so it does not have to contain all the information when it is first generated.. Here is a sample history record.

History Add New History

Record ID	63 Modify Record Delete
Case Number	try'this
Date	06/14/2019
Needs list	
Need	something from O'Grady
Amount	0.00
Action	O'leary
Recommend	pay the bill to smart'y
Payment Request	Method of approval (CM, ER, AD): check # check date: Amount: _________________________ Client account # Payee information Name: address 1: address 2: Contact name: Contact Phone #: Special payment instructions:
Helpers	Russ Keenan and o'henry
Organization Help	someone else's problem
Comments	ER sent on 08/02/2019 at 08:31:35. won't work
Aldi	
Landlord Name	None Name not in apartment records.
Landlord Payment	0.00
Payment date	
Check Nbr.	
Date sent to Council	

New Apart. Record

Undelete Record

The user can delete a record, but the contents are still available. If a record needs to be undeleted, the user clicks on the Undelete Record option. Clicking on "Click Here" in row 1 will undelete record 41 for Jim Bob.

Volunteer Record

A member has the option of adding volunteer records to keep track of hours and miles. This is handy for the annual report that is required by the Council and for an individual who can itemize on taxes. To add a new record, click on the Add Vol. Record button. Fill in the data, then click on Save Volunteer Record.

Volunteer records are summarized when a member record is displayed.

Volunteer Records Add Vol. Record

Date	Hours	Miles	Activity	Modify
02/12/2018	2.0	7.0	home visit	Click Here
02/02/2017	11.0	20.0	4 HV, 1 MEETING	Click Here
08/27/2016	5.0	0.0	conversion of database to Spanish	Click Here
08/27/2016	2.1	3.5	Database - add volunteer record	Click Here
06/21/2016	1.2	2.3	advocate for #200 and #255	Click Here
03/28/2015	1.0	3.0	Advocate for #255	Click Here

Total hours = 22.3
Total miles = 35.8

Delete cookie

What is a cookie?

A cookie is a small, named piece of data that is stored on your device (PC, laptop, tablet, smartphone).

What do cookies do?

A cookie is often used to authorize access to secure data.

A cookie can also be used to keep track of data like what you searched for last.

When you access the SVdP database, the server executes the SVdP program. The program asks for the cookie. If no cookie is returned by the device, the program sends the login screen. When a member enters the correct information into the login form, a cookie is stored on their device. When a cookie is present, the program displays the A to Z screen.

The cookie is used as authorization that the person who has the device should have access to the data. If you click on the button "Delete Cookie", the cookie is deleted and you have to log in again the next time you access the database. This s like saying: "this device is no longer authorized to access the database."

The problem:

If a person loses a mobile device and has accessed the SVdP database, whoever has the device has access to the data.

Solutions:

Anyone using a mobile device should delete the cookie when they are done. Anyone who loses a device should notify us (me) immediately, and I can lock out access to the database from that person.

Thank you for protecting access to this sensitive data on a mobile device.