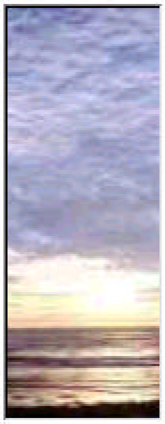

COSP Manual

March 10, 2001

COSP is a membership program for Windows 95 or later. Its use is intended for tracking, sorting, and generating reports for donations and other monies collected throughout the year. It was created for church oriented organizations; however, it can be used for any organization that needs to manage collections from its members.

COSP generates a database file containing the members' information which includes name, address, phone and a section for notes. It also maintains records of all donations made by each member and what the donation was for. All information within the database can be searched and filtered to achieve a desired result. COSP will generate reports based on your selection which includes membership reports, accountant reports, and query reports. COSP can generate an address data file from the members' information that can used to create mail merge documents, addressing envelopes, labels and stickers.

Since many churches and charity organizations use volunteers to work with membership information, mistakes can easily occur. COSP was designed to be easy to use. A volunteer could start entering in donations after 10 minutes of instruction. There are different password protected levels in COSP, keeping personal information private. All member information, passwords, and data is encrypted into a single COSP database file, which will have a .csp extension.

Installation

In the instructions below, we are assuming that D is the drive letter of your CD drive. If D is not the drive letter for your CD drive, substitute the correct letter.

To install from the CD:

If you are running Windows 95, you must first install Decomp95. This program is located on the CD. Insert the CD into your CD drive. Click on Start on the Windows Task Bar, click on RUN, and type in D:\ Decomp95 and press enter. Decomp95 will load and update your system. You must restart your computer to continue. Again Click on Start on the Windows Task Bar, click on RUN, and type in D:\ Setup and press enter. The Setup program will guide you through the installation process. If Setup finds more of your system files are out of date, Setup will advise you that it cannot continue, and you must restart your computer before it can complete the installation. Restart your computer. Run Setup again. Setup will try to pick up where it left off and finish installing COSP.

Starting COSP

Click on Start on the Windows Task Bar, click on Programs, click on COSP folder tab and then click on COSP. You can alternately double click on any COSP database file, which will have a .csp extension, and COSP will start up and load the database file that you double clicked on. If COSP is already running, you cannot start another instance of COSP.

When you first start COSP, you will be in Standard Mode. Some options and menu items will not be available to you. See Standard Mode for a detailed description.

If you start COSP using the Start menu, COSP will load without an active database. To open an existing COSP database, click on File and then on Open Database to select a COSP file. You can also click on the Open icon on the toolbar. There is a example database located in the folder where you installed COSP, called Sample.csp. To start a new database, click on File and then on New Database, and then on New Blank Database. You can also click on the New Blank Database icon on the toolbar. You must choose a name and a folder for the new database. COSP will generate a new database with a default member called Our Visitor, which is for misc. cash donations from visitors. See Our Visitor for a detailed description. CTRL+B is the hot-key for New Blank Database. CTRL+O is the hot-key for Open Database.

Administrator Mode

Administrator Mode allows you to set and delete executive passwords. To select Administrator Mode, Click on Mode and then on Administrator. Enter in the Administrator password and click OK. By default the Administrator password is cosp. Passwords are not case sensitive. A window will appear showing a small data grid with all the executive names and passwords. One of the names is Administrator. The name Administrator cannot be edited or deleted, but the associated password can be changed.

You can have many users, each with a different password. To enter a new user and password, click on Add New. A new entry will be added with "user" as the default name and "cosp" as the default password. To change either the name or password, highlight the item and enter in the correct information. Passwords must be four characters long. To delete a user and password, select the row by clicking in the narrow column on the left side of the grid. You can also click inside the Name or Password cell of the user you want to delete. Click on the Delete button. You will be asked to confirm your deletion. If you select yes, the user will be deleted. Click on OK to close the Administrator window. CTRL+W is the hot-key for Administrator Mode.

New Database, Setting Properties
First COSP Database

When you make a new database for your organization, you will have to change the property values so that your current information will appear on the printouts. First you will need to switch to Executive Mode. Click on Mode and then on Executive. You can also click on the Executive toolbar icon. Type cosp (the default password) in the input window and click on OK. Click on File and then on Properties. A window will appear showing you the current information. Enter in the new information that you want to appear on the printouts. You can enter in any text you want as long as it's within the limit of characters. A default logo will also appear on the reports. If you do not want a logo to appear, leave the logo line blank, or you can choose any bmp or jpg picture instead. Click on the browse button to select a different logo. The logo picture is not stored in the database, only its path and name. If the database file is moved to another computer, the logo may not be available. Your new database will have one member which is named Our Visitor for anonymous donations. To add new members, see Adding Members. CTRL+I is the hot-key for Properties.

Our Visitor List

The first record of the database is named Our Visitor List by default. Donations and other monies which are not associated with a particular member should be added to this record. The name for record one can be changed to anything you like. See Executive Mode for more information. You cannot delete the first record of the database.

Adding Members

You can add members in Standard and Executive Modes. Click on Edit and then on Add Member, or click on the Add Member toolbar icon. A window will appear with empty text boxes. Enter in the information about the new member. The first three lines must be filled in to continue. Enter in any pertinent information in the Notes section. This information can be birthdays, groups or clubs that the member might be involved in, or even if the member has children. This information can used in sorting and filtering for special reports. See Filtering. When you're finished entering data, click on OK to accept the new member. Member information can be changed at a later time in Executive Mode. See Executive Mode for more information. Each member will automatically be assigned a member ID, which COSP uses to distinguish members with similar names. This number will remain the same even after compressing and repairing the database however, if the database is Cloned and Cleared, the member ID number will be changed. For more information see Clone and Clear. In Standard Mode, pressing <ENTER> with the Rapid Search list box empty will bring up the Add Members screen. CTRL+M is the hot-key for Add Member.

Deleting Members

To delete a member from a database, you must be in Executive Mode. See Executive Mode. Click on Edit and then on Delete Member, or click on the Delete Member toolbar icon. A warning window will appear asking you to confirm your action and require that you press the ALT key and then click on OK to complete the deletion. The member and all information will be deleted. All donations collected from this member will be transferred to Our Visitor. A deleted member will not show up on any reports created after the member is deleted. The donations will appear under Our Visitor. CTRL+E is the hot-key for Delete Member.

Adding Donations

Standard Mode

Standard Mode makes use of Rapid Search. There are several ways to use Rapid Search. You can start typing in the last name and then the first name of the member <u>separated by a space</u>.

Note: Rapid Search is not case sensitive.

For example: smith john

The list box below will list all names that match the text as you typed it in. The list box will also show the address of the member. If only one name is listed in the list box, it will become highlighted. Press <ENTER> at this point and that member's donation screen will appear. In this example, if there are several John Smiths, all the John Smiths will be listed. You can double click on the John Smith you want based on his address, or you can type another space and begin entering in the address to further eliminate names. This approach is useful because many donations are made by check and the member's name and address are readily available.

Another way to select a name in Rapid Search is to use the member's initials. Type in the initials, last initial first, separated by a space.

For example: s j

The list box below will again list all the members whose last name starts with s and first name starts with j. You can use any amount of characters from the last and first name to fill the list box, as long as you use last name first and separate them with a space.

For example: smi jo

The list box below will again list all the members whose last name starts with smi and first name starts with jo.

You can also add a donation using the scroll arrows. When you load a database, the last member will be displayed in the text boxes in the upper left-hand corner. By clicking on the scroll arrows at the bottom of the screen, the text boxes will scroll through all the members. When the correct member is shown, you can click on Edit and then on Add Donation, or click on the Add Donation toolbar icon, to bring up the Add Donation input window.   CTRL+A is the hot-key for Add Donation.

Single Donations

In the box labeled Amount, enter in the amount of the donation. If there is a check number, enter that number in the Check number box. In the Destination box, you can either scroll down and choose a destination from the list or type in a new destination. If you choose an item from the list, the Remove Item From List button will be enabled. Click on this button to remove the selected destination from the list. When you enter in a new destination, the Add Item To List button is enabled. Click this button to add the new destination to the list if it will be used in the future. Make sure the drop list box is not extended when entering in a new item. The current date will be displayed in the date box. You can change this date if it is not correct. To save from changing the date each time a donation is added, you can change the date and check the Remember Date option to maintain the new date until COSP is restarted. Click on OK to enter the new donation.

Multiple Donations

If the donation is for multiple destinations, usually in the form of a check, choose the Multiple Donation option. To use this option, enter in a check number and select the Multiple Donation option. When you choose Multiple Donation, the Destination box is disabled, because you will choosing multiple destinations later. Enter in the amount, date, and click on OK. The input window now displays two new text boxes labeled as Balance and Amount, both in bold print. The Balance box will contain the current balance of the check amount. Enter in an amount in the Amount box, select a destination for that amount and click OK. That donation will be added to the database and will be deducted from the current balance. Continue entering donations until you reach a zero balance. Upon reaching a zero balance, the input window will close. If you click cancel at any time, all donations for that check number will be cancelled. The Add Item and Remove Item buttons are still active with multiple donations.

Adding Donations
Executive Mode

You must be in Executive Mode. See Executive Mode. Rapid Search is not available in Executive Mode. By clicking on the scroll arrows at the bottom of the screen, the text boxes will scroll through all the members. When the correct member is shown, click on Edit and then on Add Donation, or click on the Add Donation toolbar icon, to bring up the Add Donation input window. See Adding Donations in Standard Mode for details on using the input window. CTRL+A is the hot-key for Add Donation.

Deleting Donations

You must be in Executive Mode. See Executive Mode. On the left-hand side of the data grid there is a gray border with an arrow pointing to one of the rows. This is the *selected* row. One of the rows is always selected. If there are many rows, you may need to scroll up or down to find the selected row. Choosing Delete Donation will affect the row that is selected. To Delete a donation, select the row by clicking in the gray border next to the row you wish to delete. The row will highlight in blue. Click on Edit and then on Delete Donation. You can also click on the Delete Donation toolbar icon. A window will appear asking you to confirm the delete action. Choosing Yes will delete that donation from the database. Deleted donations cannot be recovered since the file on disk is automatically updated. If you click inside one of the cells instead of on the gray border, you have indicated that you wish to edit the contents of that cell. This turns the toolbar and the menu off. To exit the cell edit mode, click on one of the data cells at the top of the screen such as First Name or Notes. For more information on cell editing, refer to the Executive Mode section. CTRL+D is the hot-key for Delete Donation

Standard Mode

When COSP first starts, it is in Standard Mode. In Standard Mode, you can open a database, add donations, add new members, or start a new database. This is the safest mode for inexperienced users. In this mode, personal information such as previous donations and totals are hidden. Almost all of the functions are disabled, such as printouts, member deletion, and filtering. Standard Mode is designed primarily for data entry from personal checks and cash donations. To return to Standard Mode from Executive Mode, click on Mode and then on Standard, or click on the Standard toolbar icon. F6 is the hot-key for Standard Mode. For further information see Adding Donations and Adding Members.

Executive Mode

Executive Mode activates all the options in COSP. To select Executive Mode, Click on Mode and then on Executive, or click on the Executive toolbar icon. Enter in an Executive or Administrator password and click OK. Passwords are not case sensitive. You can have many users, each with a different password. To enter, change, or delete an executive password, select Administrator Mode. For further information see Administrator Mode.

The Rapid Search window is replaced with a data grid displaying the information about the current member. By clicking on the scroll arrows at the bottom of the screen, the text boxes will scroll through all the members. The current member and associated information appears in the text boxes above. A running total is displayed in blue along with a total number of donations in green. The data grid can display data in Member View or List View. See Member View or List View for more information. The information in the data grid and the text boxes above can be edited in Executive Mode. You can change or correct the data in each of the cells as long as the new data meets the requirements for its respective cell. For example, a donation amount must be a positive number and not text. A new date entry must qualify as a date. A new check number must be a number and not text. To remove a check number, enter zero. You cannot change a Payment ID number. COSP uses this number internally. If a donation was entered for the wrong member, you can change the Member ID number in the data grid to the correct Member ID number. This will move the donation to the correct member. If the new Member ID number does not exist, the change will not take affect. The data grid will update and re-sort after a change is made. Data in the text boxes above can also be changed in Executive Mode, except for the Member ID text box.

To change member information located in the text boxes at the top of the screen, double click on one of the text boxes. An input window will open prompting you for the new data. First Name, Last Name, and Address text boxes must contain data. The text box will highlight in blue to indicate which text box is being edited. To edit the Notes, double click on the Notes text box and enter data. No window will appear.

To change information inside the data grid, click inside one of the cells. When one of the cells is selected, the toolbar disappears. The menu and member scrollbar also become inactive. This is to prevent those functions from being used while you are changing data. Change the information and leave that cell by pressing <ENTER>, <TAB>, or click another cell. To cancel editing, press <ESC> before leaving the cell. The original data should return to that cell.

Caution should be used when making changes. When changes are made, the database will automatically be updated. These are permanent changes to the database file saved on the hard drive or disk. You will not be prompted to save changes. You can always change the information back if it is not correct. F7 is the hot-key for Executive Mode.

Member View

Member View is the default display when Executive Mode is selected. Member View fills the data grid with the current member's information. The current member's name and address is shown in the text boxes above. When you click on the scroll arrows at the bottom of the screen to cycle through the members, the data grid updates with each new member. The information shown in the data grid belongs to the current member. The total number of donations is shown in green and the total of viewable list is also updated in blue. The data grid can be sorted or filtered to aid in finding data or results. See Sort By and Filter for more information. Data can be changed as described in Executive Mode. To switch to Member View from List View, click on Filter and then on Member View, or click on the Member View toolbar icon. F11 is the hot-key for Member View.

List View

List View is available in Executive Mode. List View gives you an opportunity to see all the donations from all the members together in the data grid. To select List View, click on Filter and then on List View, or click on the List View toolbar icon. The scroll arrows at the bottom of the screen will disappear. If you click in one of the cells in the data grid, the text boxes above will update with the member information that corresponds to the cell you have selected. The data grid can be sorted or filtered to aid in finding data or results, see Sort By and Filter for more information. Data can be changed as described in Executive Mode. F12 is the hot-key for List View.

View Toolbar

You must be in Executive Mode. See Executive Mode. You can select whether to view the Toolbar or not by checking or unchecking the Toolbar selection. Click on View and then on Toolbar to toggle the selection.

Sort By

You must be in Executive Mode. See Executive Mode. In Executive Mode, a grid showing all donations is displayed in the lower half of the screen. The grid is sorted by Payment Date by default when the database is opened. You can choose to sort the grid by either Payment Date, Payment ID, Payment Amount, Check Number, Destination, or Payment Date. Click on View and then on Sort By, and then choose one of the items in the list to change the sort order. Each sort option has a hot-key equivalent. F1-F5 are the hot-keys for Sort By and they will also change the sort order.

Sort by Payment ID	F1	Sort by Destination	F4
Sort by Payment Amount	F2	Sort by Payment Date	F5
Sort by Check Number	F3		

Filter
Filter Members

You must be in Executive Mode. See Executive Mode. Filtering Members is only available in Member View. To select Filter Members, click on Filter and then on Filter Members, or click on the Filter Members toolbar icon. The Filter Member window will open. Enter data in the cells corresponding to the fields that you want to filter. To find all last names that start with S, enter in S* in the Last Name cell and click on OK. The * is used as a wildcard. Only the members whose last name begins with S will be visible. The text in the Member data cells on the main screen will turn blue as a reminder that some of the names may be filtered out. To show all members again, click on Filter Members and leave all cells blank and click on OK. You can enter criteria in more than one cell if needed. To find all last names that start with S and live in a city starting with C, enter in S* in the Last Name cell and C* in the City cell, and click on OK. To find all members who have a telephone number listed in the database, enter * in the phone cell and click OK. Only members having data in the phone cell will be visible. You can type son, daughter, or some other known fact about the member in the member's Notes cell when they are added to the database. Then you can find all members that are similar. To find members who have a daughter, you can select Filter Members and enter Daughter* in the Notes cell and click on OK. All members that have the word daughter or daughters in the Notes cell will be visible. You can enter the word Choir in a member's Notes cell if they are in the choir. You can then find all members of the choir for a mailing list. Filter criteria is not case sensitive. You can print out a statement of the filter results. See Print; Current Filtered Statement. F8 is the hot-key for Filter Members.

Filter
Filter Donations

You must be in Executive Mode. See Executive Mode. Filtering Donations is available in both Member View and List View. Filtering Donations looks slightly different in each view. You can print out a statement of the filter results. See Print; Current Filtered Statement. F9 is the hot-key for Filter Donations.

Filter Donations in List View

Remember that in List View, all donations from all the members are listed in the grid. To select Filter Donations, click on Filter and then on Filter Donations, or click on the Filter Donations toolbar icon. The Filter Donations window will open. Choose an operator such as >, <, or = from the drop down box for one of the data fields. Enter the criteria for that field and click OK. To find all donations greater than $100, choose the > operator from the drop down box under Payment Amount. Then enter in 100 in the data field next to the operator and click on OK. Only entries that have a payment amount greater than $100 will be visible. The text will also turn blue as a reminder that some of the data is filtered out. You can enter criteria in more than one cell if needed. To find all entries less than $500 and also all entries for the Mission, choose the < operator below Payment Amount and enter in 500 in the data field next to the operator. Then choose Exactly from the drop down box below Destination. In the field next to the Destination operator, enter in Mission and click on OK. Only entries that meet the criteria will be visible. To show all data again, click on Filter Donations and leave all cells blank and click on OK.

Filter Donations in Member View

In Member View, only the current member's donations are listed in the grid. When you apply a Donation Filter, the grid will display the donations that meet the filter criteria for that member. You can click on the scroll arrows at the bottom of the screen to cycle through the members and view the results of the filter on each member. The grid text will also turn blue as a reminder that some of the data is filtered out. If the current member does not have any donations that meet the criteria, the grid will appear empty. Applying a Donation Filter works the same as described above in Filter Donations in List View.

Print Reports

Description

You must be in Executive Mode. See Executive Mode. To print reports, click on File and then on Print, or click on the Print toolbar icon. The Print Report window will open. When selecting items in the list, you can select the first item, hold down the SHIFT key and select the last item to highlight an array of items. You can also hold down the CTRL key and select multiple items that are non-sequential. The Select All Dates box is checked by default. If you want a statement for a particular date range uncheck this box and enter in the date range you want. A starting and ending date are required. After you have made your print choices, click on OK. COSP will switch to Print Preview and show the report, including a Summary page. You can maneuver through the pages by clicking on the page arrows at the lower left-hand corner of the screen. To jump to a particular page, highlight the page number between the arrows and enter in the page number you want and press ENTER. When you are ready to print, click on the Print icon at the top of the Print Preview screen. You can export the report as a text document by clicking on the Export icon also at the top of the Print Preview screen. When you are finished printing, click on the X in the upper right hand corner to close Print Preview. For more information on setting up the properties on the reports see New Database. CTRL+P is the hot-key for Print Report.

Member Statements

Open the Print Report window as described above. Click on the button next to Member Statements. The names of all the members in the current database will be listed in the list box on the right. Highlight the member(s) whose statements you want to print. Set the dates as needed. Click on OK. A statement will be generated for each member selected showing the donations within the date range. Each report will be sorted by payment date.

Accountant Statement

Open the Print Report window as described above. Click on the button next to Accountant Statement. Set the dates as needed. Click on OK. A statement will be generated for the accountant showing all donations within the date range, including totals. The report will be sorted by payment date.

Category Statements

Open the Print Report window as described above. Click on the button next to Category Statements. The names of all the categories in the current database will be listed in the list box on the right. Highlight the categories you want to print. Set the dates as needed. Click on OK. A statement will be generated for each category selected showing the donations within the date range. Each report will be sorted by payment date.

Current Filtered Statement

Open the Print Report window as described above. Click on the button next to Current Filtered Statement. Click on OK. A statement will be generated for the current filter you have applied to the database as described in Filter Members and Filter Donations. The Date Range text boxes are disabled for this report since the filter may have its own date criteria.

Mail Merge Data File

Open the Print Report window as described above. Click on the button next to Mail Merge Data File. The names of all the members in the current database will be listed in the list box on the right. Highlight the member(s) that you want to include in the mail merge. Click on OK. The Save File window will open prompting you for a file name for the Mail Merge Data File. The defa ult name is "Default Merge.rtf". Choose a path and a file name for the mail merge file. Click on Save. The data for the selected members will be saved in Rich Text Format. You can now use a label program or word processor to create mail merges, labels, or envelopes by loading in the data file you created as the source file. Read the documentation for your word processor for more information on mail merge. Creating mail merge files with COSP is a convenient way of printing envelopes since all the member information is already stored in the database.

Repair / Compress

You must be in Executive Mode. See Executive Mode. Most of the time Repairing and Compressing won't be necessary. When you delete members from the database, the data is deleted but the space used is not freed up. The space is used for future members. If you delete many members and would like to reduce the file size of the database, you can compress it to free up all the allocated space used by deleted members. If you encounter errors with a database, you can select Repair/Compress to try and correct the errors. To Repair or Compress, click on File and then on Repair/Compress. The current database will close and COSP will try to repair and compress the file. A window will appear displaying the results and then the same database will reopen in Standard Mode. CTRL+R is the hot-key for Repair/Compress.

Clone and Clear

Instead of having one database that keeps data over a period of several years, you may want to start a new database at the start of each year. This will also help COSP to run faster. To save you from typing each member's name and address into the new database, Clone and Clear can be used to duplicate a database and remove all donations. To Clone and Clear a database, open the database file you want to clone. You must be in Executive Mode. See Executive Mode. Click on File and then on New Database, and finally on Clone and Clear. A window will open prompting you for a filename and folder path for the new database. Enter a new name in the File Name text box, and click on Open. The old database will close. A new database having the name you entered will open in Standard Mode. The new database will have a record for each member of the old database but will have no donations. All the organizational information listed under Properties will be transferred to the new database. All passwords will also be transferred. CTRL+C is the hot-key for Clone and Clear.

COSP Hot-Keys Reference Sheet

Add Donation	Ctrl + A
Add Member	Ctrl + M
Administrator Mode	Ctrl + W
Clone & Clear	Ctrl + C
Close Database	Ctrl + L
Delete Donation	Ctrl + D
Delete Member	Ctrl + E
Executive Mode	F7
Exit	Ctrl + X
Filter Donations	F9
Filter Members	F8
List View	F12
Member View	F11
New Blank Database	Ctrl + B
Open Database	Ctrl + O
Print	Ctrl + P
Properties	Ctrl + I
Repair / Compress	Ctrl + R
Sort by Check Number	F3
Sort by Destination	F4
Sort by Payment Amount	F2
Sort by Payment Date	F5
Sort by Payment ID	F1
Standard Mode	F6

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