

# Statistical Report Program for the Training Institute

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Reference Guide

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# 1 The Basics

## 1.1 Purpose of the Program

The *Statistical Report Program for the Training Institute (SRP Institute)* was developed at the Bahá'í World Centre to assist institute coordinators in the collection and maintenance of basic statistical information on the institute process at the cluster level. Through the program, the institute coordinator can maintain records of all institute-related activities—children's classes, junior youth groups and study circles—that are taking place in a cluster, as well as the locations where these activities are taking place and the individuals who are associated with the activities, either as participants or as facilitators, and whether registered as Bahá'is or not. The program can also generate a number of reports that may be helpful for planning purposes, or in supporting the day-to-day activities of the institute coordinator.

The program uses a geographic hierarchy to organize the data in the database and produce statistical information. The records of every individual and activity are associated with a locality record, which, in turn, is associated with a record of the cluster, region and national community to which it belongs. If the *Statistical Report Program (SRP)* is already implemented in a cluster, it is possible to obtain an "Area file" from the Secretary of the Area Teaching Committee, or the person maintaining the program on behalf of the Committee, and to import this file into the *SRP Institute* in order to get a head start on the entering of information on locations and individuals. Upon importing an Area file into the *SRP Institute*, the records in that file of all believers who have either completed at least one course of the training institute, or who are listed as currently participating in a children's class or junior youth group, are added to the *SRP Institute* database. Similarly, the records of all localities where these believers reside are also added to the *SRP Institute* database, including the records of the cluster, region and national community these localities belong to. If the *SRP* is not maintained at the cluster level, but at the regional or national level instead, such an Area file can be obtained from the regional or national statistics officer. If the *SRP* is not maintained for the cluster at all, then all location and individual records will have to be entered manually.

Regarding the recording of information on activities in the program, it is important to note the following: children's classes and study circles are considered single activities organized around a specific grade or the study of a particular book. As such, when that particular grade, or the study of that particular book, is finished, the activity comes to an end, and the record of that activity in the program would be marked as completed. Information on junior youth groups is recorded differently. The junior youth group typically has a lifespan of two to three years, during which the group studies a number of junior youth books, or texts. In this case, the *group* is considered the activity, and the study of the texts a sub-activity. Every time the group completes the study of a text, the activity record of the group is updated with this information. The activity record itself would only be marked as completed after the group as a whole has completed the study of all the books or no longer meets.

The program allows for some flexibility in recording information about the participants in an activity. It is possible to enter for each activity just the *number* of participants—for example, when detailed information on the names and contact details of the participants in an activity is not readily available—and this information is used for the purpose of generating the various statistical summary reports. In addition, it is possible to associate the individual records of the participants with the

corresponding activity records, and this information is used for the purpose of generating reports on activities and individuals.

## 1.2 Finding Your Way around the Program

Figure 1 below displays the main elements comprising the general framework of the program.

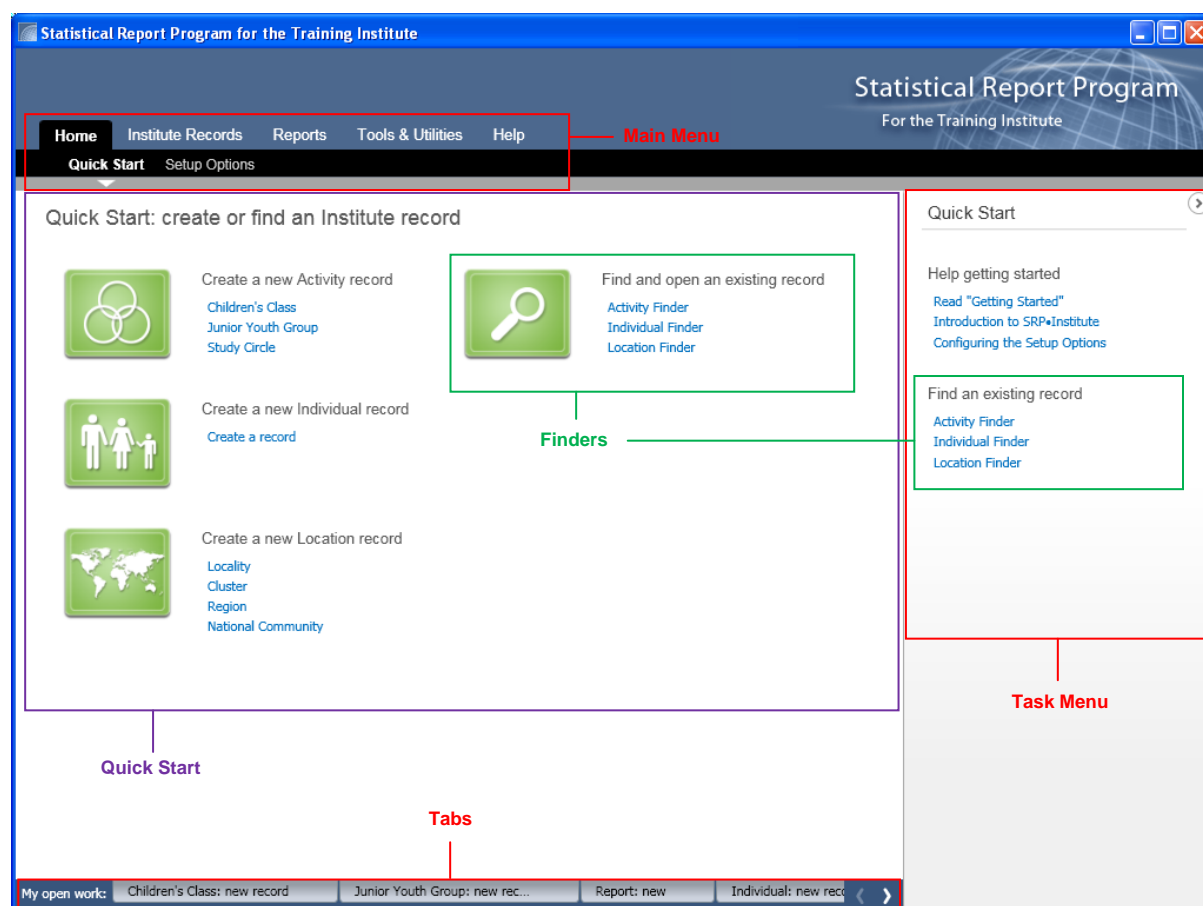


Figure 1 - Framework of the Program

### 1.2.1 Main Menu

All the functions of the *SRP Institute* can be accessed through the main menu. The main menu is divided into several sections that allow for the carrying out of tasks such as the creation and finding of records, and the generation of reports. Navigating through the main menu of the program does not cause any tabs (see below) to be opened.


### 1.2.2 Quick Start

All the functions available in the Institute Records section are conveniently grouped in the Quick Start menu which can be accessed under Home in the main menu.

### **1.2.3 Tabs**

Whenever a record is created or opened in the program, or a report is generated, a new tab opens at the bottom of the window. The tabs allow you to have several records or reports open at the same time and navigate between them. When the number of open tabs fills the program window to overflowing, you can use the left and right arrows at the bottom of the window to scroll between the first and the last tab. Tabs can be closed by clicking the *Close* or *Close Record* button on each form, or the 'x' on the right side of each tab.

### **1.2.4 Task Menu**

For anything displayed in the main workspace, corresponding information and links are presented in the task menu. If needed, this task menu can be collapsed using the arrow on the top right of the pane , thereby extending the size of the workspace.

### **1.2.5 Finders**

Existing records can be opened using the three Finders that are available in the program. The Finders are accessible through some of the main screens or the task menu.

## 2 Institute Records

The program allows for the creation and maintenance of records on locations, activities, and individuals. The paragraphs below describe in some detail how these records can be created and later edited as needed.

### 2.1 Creating New Location Records

In order to track the activities of the institute process in a cluster, the program requires that a geographical hierarchy has already been created in the program of the localities, cluster, region, and national community where the activities of the training institute are taking place and the participants reside. Without this geographical hierarchy, it will not be possible to enter data on activities or individuals into the program. When the *SRP Institute* is first implemented in a cluster, this geographical hierarchy can be obtained by importing the “Area file” from the *SRP*, (see Chapter 4.1). Where such a file does not exist in a cluster, this information needs to be entered manually, as described below.

Follow the steps outlined below, and in this specific order, to create the minimal geographic hierarchy needed to begin entering data.

#### 2.1.1 Creating a National Community Record

Select **Institute Records** from the main menu, and then select **Locations**. Click on the [National Community](#) link under **Create a new Location record**. A new form will open in a separate tab.

1. Enter the name of the national community in the designated field.
2. Save your changes and close the record.

#### 2.1.2 Creating a Region Record

Select **Institute Records** from the main menu, and then select **Locations**. Click on the [Region](#) link under **Create a new Location record**. A new form will open in a separate tab.

1. Enter the name of the region in the designated field.  
Note: If there is no regional level of Bahá’í administration in the country, the name of the national community should be entered here.
2. Under **National Community**, select the name of the national community from the dropdown menu.
3. Save your changes and close the record.

#### 2.1.3 Creating a Cluster Record

Select **Institute Records** from the main menu, and then select **Locations**. Click on the [Cluster](#) link under **Create a new Location record**. A new form will open in a separate tab.

1. Enter the name of the cluster in the designated field.
2. Under **Region**, select the name of the region from the dropdown menu.
3. Save your changes and close the record.

### 2.1.4 Creating a Locality Record

Select **Institute Records** from the main menu, and then select **Locations**. Click on the [Locality](#) link under **Create a new Location record**. A new form will open in a separate tab.

1. Enter the name of the locality in the designated field.
2. Under **Cluster**, select the name of the cluster from the dropdown menu.
3. Save your changes and close the record.

## 2.2 Creating New Individual Records

When an Area file is imported into the *SRP Institute*, the records in that file of all believers who have either completed at least one course of the training institute, or are currently participating in a children's class or a junior youth group, are added to the *SRP Institute* database. It is likely that, in addition to these individuals, there are others who are currently participating in the activities of the training institute, and for each of these individuals a separate record will need to be created in the program.

These are the steps typically followed in creating a new individual record:

Select **Institute Records** from the main menu, and then select **Individuals**. Click on the [Create a record](#) link under **Create a new Individual Record**. A new form will open in a separate tab where information on the Individual can be recorded.

On the Basic Information tab:

1. Select the name of the **Locality** where the individual resides from the dropdown list. Alternatively, you can use the [Find a Locality](#) link to search for the name of a locality in the Location Finder.  
Note: In order to associate an individual record with a locality, the record for that locality must already exist in the program.
2. Enter the **First name** of the individual in the field provided.
3. Enter the **Family name** of the individual.
4. Select the **Gender** of the individual.
5. Enter the **Estimated age** of the individual or the exact **Date of birth** (if known) in the fields provided.  
Note: the **Age category** will automatically be calculated based on the estimated age or the date of birth of the individual; this field is disabled for entering data.
6. Select whether or not the individual is a **Registered Bahá'í**. If unknown, mark the field as unknown.
7. Enter the **Email contact address**, the **Home address**, and the **Main contact phone**, if known.



#### On the Study History tab:

No information can be entered on this tab, but every time an individual is associated with an activity, whether as a participant or as a facilitator, a row will be added to this table. You can choose to display either the full table, or show the rows separately by role.

#### On the All Books and Courses tab:

If an individual has participated in a children's class, junior youth group, or study circle prior to the implementation of the program, information on grades and books completed can be entered on this form as follows:

1. Choose an activity type from the drop down list
2. Check the grades or books that an individual has completed.

However, once the program has been implemented, the various grades and books in this form are checked automatically, and there would be no need to do this manually. In this case, the Date Completed column in the table will show either that the individual is currently attending a particular grade or course, or the date that this activity was successfully completed.

When you are done, click the *Save* button to save the information and then the *Close Record* button to close the record. It is suggested you click the *Save* button regularly as you update the information in the form.

## **2.3 Creating New Activity Records**

The program allows for the creation and maintenance of three types of activity records: children's classes, junior youth groups, and study circles. The sections below describe how new records for each of these activities can be created in the program.

### **2.3.1 Creating a New Children's Class Record**

When a new children's class is initiated in a cluster, use the [Children's Class](#) form to create a record of the activity. This form allows for the recording of basic information on a children's class, such as the locality in which the class is held, the grade of the class, the name of the facilitator(s), and the start and end date of the class. It also allows for the recording of information on the number and names of the participants in the class.

These are the steps typically followed in creating a new children's class record:

Select **Institute Records** from the main menu, and then select **Activities**. Click on the [Children's Class](#) link under **Create a new Activity Record**. A new form will open in a separate tab where information on the children's class can be recorded.

#### On the Basic Information tab:

1. Select the name of the **Locality** where the children's class is taking place from the dropdown list. Alternatively, you can use the [Find a Locality](#) link to search for the name of a locality in the Location Finder.

Note: In order to associate a children's class record with a locality, the record for that locality must already exist in the program.

2. Select the **Grade** of the children's class.
3. Under **Started**, select the month and year the children's class began. Leave the **Completed** checkbox blank until such time as the lessons in the grade have all been completed or the class no longer meets.
4. Click the **Add Facilitator** button to find the individual record of the children's class teacher and associate it with the children's class. It is possible to associate more than one teacher with the class.

On the Participants tab:

1. Enter the total number of participants in the children's class and the number of children from Bahá'í families.
2. Click the **Add Participant** button to find the individual records of the children who are participating in the class and to associate them with the activity. If a record for one or more participants has not yet been created in the program, you can use the link [Create a new Individual record](#) to do this. This will open a new form while keeping the current form open in the background. After you have successfully created a new record for a participant and saved the information, you can associate the record of the participant with the children's class by repeating this step.

Note: If you add the names of additional participants to the activity later, you can click the [Update to match the list below](#) link in this form to re-calculate the total number of children and the number from Bahá'í families entered in Step 1 above.

When you are done, click the *Save* button to save the information and then the *Close Record* button to close the record. It is suggested you click the *Save* button regularly as you update the information in the form.

### 2.3.2 Creating a New Junior Youth Group Record

When a new junior youth group is initiated in a cluster, use the [Junior Youth Group](#) form to create a record of the activity. This form allows for the recording of basic information on a junior youth group, such as the locality in which the group meets, the start and end date of the group, the name of the facilitator(s), and whether or not the group is carrying out service projects. The form includes a tab called Study History where the books studied by the junior youth group can be progressively recorded. It also allows for the recording of information on the number and names of the participants in the group.

These are the steps typically followed in creating a new junior youth group record:

Select **Institute Records** from the main menu, and then select **Activities**. Click on the [Junior Youth Group](#) link under **Create a new Activity Record**. A new form will open in a separate tab where information on the junior youth group can be recorded.

On the Basic Information tab:

1. Select the name of the **Locality** where the junior youth group generally meets from the dropdown list. Alternatively, you can use the [Find a Locality](#) link to search for the name of a locality in the Location Finder.  
Note: In order to associate a junior youth group record with a locality, the record for that locality must already exist in the program.
2. Under **Group started**, select the month and year the junior youth group began. Leave the **Group ended** checkbox blank until such time as the group has completed the entire program or no longer meets.
3. Click the **Add Facilitator** button to find the individual record of the junior youth animator and to associate it with the group. It is possible to associate more than one animator with the group.
4. Check the field **The group is carrying out service projects** if this is the case.

On the Study History tab:

1. Select the **Book** that the group is currently studying from the dropdown list.
2. After this is done, select under **Started** the month and year the study of this book began. Leave the **Completed** checkbox blank until such time as the group has completed the study of the book.

On the Participants tab:

1. Enter the total number of participants in the junior youth group as well as the number of junior youth from Bahá'í families.
2. Click the **Add Participant** button to find the individual records of the junior youth who are participating in the group and to associate them with the activity. To do this, first select the relevant book title from the dropdown list. If a record for one or more participants has not yet been created in the program, you can use the link [Create a new Individual record](#) to do this. This will open a new form while keeping the current form open in the background. After you have successfully created a new record for a participant, and saved the information, you can associate the record of the participant with the junior youth group by repeating this step.

Note: If you add the names of additional participants to the activity later, you can click the [Update to match list for the “current book” below](#) link in this form to re-calculate the total number of junior youth and the number from Bahá'í families entered in Step 1 above.

When you are done, click the *Save* button to save the information and then the *Close Record* button to close the record. It is suggested you click the *Save* button regularly as you update the information in the form.

### 2.3.3 Creating a New Study Circle record

When a new study circle is initiated in a cluster, use the [Study Circle](#) form to create a record of the activity. This form allows for the recording of basic information on a study circle, such as the locality where the study circle takes place, the book that is being studied, the name of the facilitator(s), and the start and end date. It also allows for the recording of information on the number and names of the participants in the study circle.

These are the steps typically followed in creating a new study circle record:

Select **Institute Records** from the main menu, and then select **Activities**. Click on the [Study Circle](#) link under **Create a new Activity Record**. A new form will open in a separate tab where information on the study circle can be recorded.

On the Basic Information tab:

1. Select the name of the **Locality** where the study circle is taking place from the dropdown list. Alternatively, you can use the [Find a Locality](#) link to search for the name of a locality in the Location Finder.  
Note: In order to associate a study circle record with a locality, the record for that locality must already exist in the program.
2. Select the **Book** being studied.
3. Under **Started**, select the month and year the study circle began. Leave the **Completed** checkbox blank until such time as the study of the book is completed.
4. Click the **Add Facilitator** button to find the individual record of the tutor of the study circle and associate it with the activity. It is possible to associate more than one tutor with a study circle.

On the Participants tab:

1. Enter the total number of participants in the study circle and the number of participants who are registered as Bahá'ís.
2. Click the **Add Participant** button to find the records of the individuals who are participating in the study circle and to associate them with the activity. If a record for one or more participants has not yet been created in the program, you can use the link [Create a new Individual record](#) to do this. This will open a new form while keeping the current form open in the background. After you have successfully created a new record for a participant, and saved the information, you can associate the record of the participant with the study circle by repeating this step

Note: If you add the names of additional participants to the activity later, you can click the *Update to match the list below* link in this form to re-calculate the total number of participants and the number of participants who are registered as Bahá'ís entered in Step 1 above.

When you are done, click the *Save* button to save the information and then the *Close Record* button to close the record. It is suggested you click the *Save* button regularly as you update the information in the form.

## 2.4 Finding and Editing Records

Existing records can be opened using one of the “finders”. There are three finders in the program, each for a specific purpose: the location finder, the individual finder, and the activity finder. The sections below describe briefly how the finders can be used.

### 2.4.1 Location Finder

The purpose of the location finder is to search for and open an existing record of a location—a locality, cluster, region or national community.

Below are the steps typically followed in finding the record of a location.

Select **Institute Records** from the main menu, and then select **Locations**. Click on the [Location Finder](#) link under **Find and open an existing record**. A new window will open where location records can be searched for. Alternatively, the finder can be opened through the link in the task menu on every screen.

1. Choose one of the following options under **Find a**:

<b>Locality</b>
<b>Cluster</b>
<b>Region</b>
<b>National Community</b>

2. After selecting an option, enter one or more search terms or leave the field blank to *show all*, and then click the *Find* button.

Note: it is possible to enter only part of a word as a search term.

3. Once you have found the record of the location you are searching for, open the record in one of the following ways:

- Select the record and then click the *Open* button.
- Use the mouse to double-click on the record.
- Use the keyboard to select the record with the arrows and then press enter.

Note: The *Open* button will be disabled until the record is selected.

### 2.4.2 Individual Finder

The purpose of the individual finder is to search for, and open, an existing record for an individual.

Below are the steps typically followed in finding the record of an individual.

Select **Institute Records** from the main menu, and then select **Individuals**. Click on the [Individual Finder](#) link under **Find and open an existing record**. A new window will open where individual records can be searched for. Alternatively, the finder can be opened through the link in the task menu on every screen.

1. Choose one of the following options under **Find a person by**:

<b>Name</b>	To search by the first, middle, or last name of an individual or a combination of these three
<b>Locality</b>	To search by the locality where the individual resides
<b>Home address</b>	To search by the home address of an individual
<b>Age Category</b>	To search by the age category of an individual, i.e., child, junior youth, youth, or adult
<b>Activity Type</b>	To search by an activity (whether completed or currently in progress) that an individual is associated with as a facilitator or a participant. For example: → Children's Class → Junior Youth Group → Study Circle → Grade 3 → Spirit of Faith → Arising to Serve

2. After selecting an option, enter one or more search terms or leave the field blank to *show all*, and then click the *Find* button.

Note: it is possible to enter only part of a word as a search term.

3. Once you have found the record of the individual you are searching for, open the record in one of the following ways:
  - Select the record and then click the *Open* button.
  - Use the mouse to double-click on the record.
  - Use the keyboard to select the record with the arrows and then press enter.

Note: The *Open* button will be disabled until the record is selected.

### 2.4.3 Activity Finder

The purpose of the activity finder is to search for, and open, an existing record for an activity.

Below are the steps typically followed in searching for the record of an activity.

Select **Institute Records** from the main menu, and then select **Activities**. Click on the [Activity Finder](#) link under **Find and open an existing record**. A new window will open where activity records can be searched for. Alternatively, the finder can be opened through the link in the task menu on every screen.

1. Choose one of the following options under **Find an activity by**:

<b>Locality</b>	To search by the locality where the activity takes place
<b>Activity Type</b>	To search by the type of activity: Examples are:  <ul style="list-style-type: none"> <li>➔ Children's Class</li> <li>➔ Junior Youth Group</li> <li>➔ Study Circle</li> <li>➔ Grade 3</li> <li>➔ Spirit of Faith</li> <li>➔ Arising to Serve</li> </ul>
<b>Facilitators Name</b>	To search by name of the facilitator

2. After selecting an option, enter one or more search terms or leave the field blank to *show all*, and then click the *Find* button.

Note: it is possible to enter only part of a word as a search term.

3. Once you have found the record of the activity you are searching for, open the record in one of the following ways:
  - Select the record and then click the *Open* button.
  - Use the mouse to double-click on the record.
  - Use the keyboard to select the record with the arrows and then press enter.

Note: The *Open* button will be disabled until the record is selected.

#### 2.4.4 Editing a Children's Class Record

When information about a children's class has changed, you can open the activity record and modify the information in the form. When the children in a children's class have completed a particular grade, the record of that class should be closed by marking the record as completed and entering a completion date. This can be done as follows:

Search for the children's class record using the activity finder, and open the record.

On the Basic Information tab:

1. Check the **Completed** field for the grade and select the month and year that the grade was completed.

Review the Participants tab to ensure that the list includes only those participants who have completed the grade. By default all participants listed are marked as having successfully completed the grade.

When you are done, click the *Save* button to save the information and then the *Close Record* button to close the record.

## 2.4.5 Editing a Junior Youth Group Record

When information about a junior youth group has changed, you can open the activity record and modify the information in the form. Every time the members of a junior youth group complete the study of one book and start the study of another book, the following steps should be taken to update the information in the program.

Search for the junior youth group record using the activity finder, and open the record:

### On the Study History tab:

1. Check the **Completed** field for the book that is listed under “Currently studying” and select the month and year that the book was completed.
2. Click the *Move to Study History* button. The book should now be listed under “Study History”.  
Note: The start and complete date of a book can be added even after it is moved to the study history by clicking [edit](#) on the record.
3. If the group has moved on to the study of the next book, select the **Book** that the group is now studying from the dropdown list at the top of the form under “currently studying” and select the month and year the study of this book began.

### On the Participants tab:

1. Under participant details, choose the book the group has just finished studying.
2. Edit the list of participants, if necessary, to ensure that only those individuals who completed the study of the book are marked accordingly. By default all participants listed are marked as having successfully completed the book.
3. Return to participant details, and now choose the book the group is currently studying. The *Copy Participants* button now becomes enabled.
4. Click the *Copy Participants* button and a pop-up window will appear.
5. Select the book previously studied and then click the *Copy List* button to add all these individuals as participants in the study of the current book.  
Note: After you have copied the list of participants from the previous book you can still modify this list by adding or removing participants. You can also choose not to use the *Copy Participants* feature and add the participants individually as you had done previously. Once you have added a participant individually, the *Copy Participant* button becomes disabled.
6. If needed, update the total number of participants in the junior youth group as well as the number of junior youth from Bahá'í families.

When the junior youth group has completed the study of all available books or the group no longer meets, the record of the group should be closed as follows:

### On the Basic Information tab:

1. Check the **Group ended** box, and select the month and year that the group ceased to exist.

When you are done, click the *Save* button to save the information and then the *Close Record* button to close the record.



### 2.4.6 Editing a Study Circle Record

When information about a study circle has changed, you can open the activity record and modify the information in the form. When the participants in a study circle have completed their study of a book, the record of that study circle should be closed by entering a completion date. This can be done as follows:

Search for the study circle record using the activity finder, and open the record:

On the Basic Information tab:

1. Check the **Completed** field for the book and select the month and year that the book was completed.

Review the Participants tab to include only those participants who have completed the study of the book. By default all participants listed are marked as having successfully completed the book.

When you are done, click the *Save* button to save the information and then the *Close Record* button to close the record.

## 3 Reports

The reports in the *SRP Institute* provide readily accessible data organized so as to assist the coordinator in his or her day-to-day work and for the purpose of planning for growth. The program includes a number of reports to assist in this regard. They are organized into three main sections: Summary Reports, Activity Reports, and Individual Reports.

The following sections describe the content of the various reports, and how they can be generated.

### 3.1 Report Types

#### 3.1.1 Summary Reports

##### Children's Classes

Ongoing Children's Classes	Displays the number of children's classes; the number of participants; the number of teachers; the number of individuals who have completed Book 3; and of those the percentage that is serving as a teacher of a children's class.
Participation by Grade	Displays the number of children in each grade.

##### Junior Youth Groups

Ongoing Junior Youth Groups	Displays the number of junior youth groups; the number of participants; the number of animators; the number of individuals who have completed Book 5; and of those the percentage that is serving as an animator of a junior youth group.
Participation by Book	Displays the number of junior youth studying the various books of the junior youth program.

##### Study Circles

Ongoing Study Circles	Displays the number of study circles; the number of participants; the number of tutors; the number of individuals who have completed Book 7; and of those the percentage that is serving as a tutor of a study circle.
Participation by Book	Displays the number of participants studying the various books in the sequence of courses.

### Pyramid of Human Resources

Pyramid of Human Resources

Displays the number of individuals who have completed each book in the sequence of courses.

### **3.1.2 Activity Reports**

#### Children's Classes

Ongoing Children's Classes

Displays each class showing the locality where the activity is taking place; the start date; the total number of children participating in the class as well as the number of children from Bahá'í families; the name of the teacher; and the contact details of the teacher.

#### Junior Youth Groups

Ongoing Junior Youth Groups

Displays each group showing the locality where the activity is taking place; the start date; the total number of junior youth participating in the group as well as the number of junior youth from Bahá'í families; the number of books the group has already completed; whether or not the group is participating in service projects; the name of the animator; and the contact details of the animator.

*Progress Report*

For each group in the list of ongoing junior youth groups, this report displays the name, age, and gender of each junior youth with a mark showing which books in the program he or she has already completed and which book he or she is currently studying.

#### Study Circles

Ongoing Study Circles

Displays each group showing the locality where the activity is taking place; the start date; the end date; the total number of participants in the study circle as well as the number of Bahá'í participants; the name of the tutor; and the contact details of the tutor.

### 3.1.3 Individual Reports

Human Resource Development	Displays a list of all the individuals recorded in the program with a mark showing which grades, junior youth books or books from the main sequence of courses they have completed or are currently studying.
Facilitators	Displays a list of those individuals who have facilitated, or are currently facilitating, any of the activities with a mark showing which grades or books they have experience facilitating, including those currently in progress.



## 3.2 Generating a Report

These are the steps typically followed in generating a report.

Select **Reports** from the main menu, and then select **Summary Reports**, **Activity Reports** or **Individual Reports**. On the screen that opens, select the particular report you want to generate. This will open a new tab where the report parameters can be entered.

1. Select a *report type*.
2. Choose the *geographic level* for which you would like to generate the report, i.e., locality, cluster, region, or national community.
3. In the *listed by* field select the geographic level at which you want to view the report. This is always one or more levels below the *geographic level* you have selected in step 3.
4. Set the *reporting period* as “current” or, when available, as of a “selected date”.
5. Finally, select the name of the *locality*, *cluster*, *region* or *national community* for which you would like to generate the report. The *Run Report* button now becomes enabled.
6. Click the *Run Report* button to generate the report. Depending on the size of the report, this may take a few seconds.

## 3.3 Exporting or Printing a Report

Once a report is generated, it is possible to print it or export it to another format, such as an Excel spreadsheet or a Word document. To print a report, click the print icon  in the report toolbar, or click on the [Print this record](#) link in the task menu. To export a report to Excel, Word or PDF, click the export icon  in the report toolbar, or the respective link in the task menu. Exporting the report to an Excel spreadsheet allows for such things as sorting and filtering that are otherwise not possible in the program itself.

## 4 Tools & Utilities

### 4.1 Importing an Area file from the Statistical Report Program

This feature is generally used only when the *SRP Institute* is first implemented in a cluster, and when data on the Bahá'í population in that cluster is already available through an “Area file” from the *SRP*—the program typically maintained by the Area Teaching Committee in a cluster.

An Area file refers to an electronic data file that can be generated by the *SRP* and contains the records of localities and believers residing in a cluster. When an Area file is imported into the *SRP Institute*, the records of all believers in that file who have either completed at least one course of the training institute, or are currently participating in a children's class or junior youth group are added to the *SRP Institute* database. Similarly, all records of the localities where these believers reside are also added to the *SRP Institute* database. In this way, you get a head-start and do not have to enter manually the records of all these individuals and localities.

In clusters where the *SRP* is implemented, the latest Area file can usually be obtained from the secretary of the Area Teaching Committee, or the person designated to work with the program on behalf of the Area Teaching Committee. In clusters where the *SRP* is not available, for example, because of the lack of computer facilities, it may be possible to obtain the Area file from the regional or national statistics officer. If no data is available for the cluster at all, then all location and individual records will have to be entered manually (See Chapter 2.1).

Once you have obtained the relevant Area file, select **Tools & Utilities** from the main menu, and then select **Export & Import**. Click on the link [Import an Area file from the Statistical Report Program](#), browse to the folder where the file is located, select it and then follow the prompt.

A progress bar will appear in a popup window. Once the file is successfully imported, click ok and the progress bar will disappear.

As mentioned, importing an Area file is generally only done once, when the *SRP Institute* is first introduced in a cluster. However, it is possible to import an Area file more than once. In that case, any records that have already been imported will be ignored and new entries found will be added to the *SRP Institute* database.

### 4.2 Backup & Restore

#### 4.2.1 Backup Database

The Backup Database function allows you to create an electronic file of all the data in your database. This file is known as a Backup file which should be created on a regular basis and saved to a location other than the computer on which the program is installed, such as an external hard-drive or another computer. If the database becomes corrupted or accidentally deleted, the most recent backup file can be used to restore the data in the database. Backup files have the extension .srpib.

To generate a Backup file, select **Tools & Utilities** from the main menu, and then select **Backup & Restore**, click on the link [Backup Database](#) and then follow the prompts.

#### 4.2.2 Restore Database

The Restore Database function allows you to restore the database from a Backup file that was previously created. You would normally only use this function when the database becomes corrupted or accidentally deleted.

**IMPORTANT!** During the restore process, all current records in your database will be deleted and replaced by the records in the Backup file which will be current as of the time it was created.

The application will need to restart in order to complete the restore process.

To use the Restore Database function, select **Tools & Utilities** from the main menu, and then select **Backup & Restore**, click on the link [Restore Database](#) and follow the prompts.

## 5 What to do if....

### **...you are not able to save the data on a form?**

If you click the *Save* button at the bottom of a form, the button should become disabled until another change to the form is made. If the button does not become disabled, then it is possible that one or more required fields have not been filled in. If this is the case, a red star will appear on the tab at the top of the form. The fields on this form that still need to be filled in will have a red box around them.

### **...you want to use the *SRP Institute* in a different language?**

Presently, the program is available in English, French and Spanish. The language can be changed at any time by reinstalling the program and selecting one of these three languages from the drop down menu. During this process, the data already entered into the database will automatically be kept.

### **...a newer version of the *SRP Institute* becomes available?**

A newer version of the program can be installed on top of the current version. There is no need to uninstall the current version of the program; all the data in the current version should automatically be moved to the new version.

### **...there is more than one institute coordinator who wants to work with the program at the cluster level?**

At the moment, there is no support yet for the exchange of information, the program is best used on only one computer at the cluster level. Functionality to support more than one coordinator is currently being developed and will be available in a subsequent version of the program.

### **...you want to use the program for more than one cluster?**

Information can be entered in the program for as many clusters as needed. However, the current version of the program does not support the transmission of information for each cluster. As such, if you have been maintaining data for multiple clusters and now want to hand over responsibility for part of the clusters to another individual, you need to first create a backup of the entire database (Tools & Utilities > Backup & Restore), and then send this backup file to this individual. After he or she has successfully restored the data in the database, he or she should delete all the information that does not pertain to the cluster(s) for which he or she now has responsibility. Functionality to support the transmission of cluster level data is currently being developed and will be available in a subsequent version of the program.

### **...the program does not allow you to create a new Locality record?**

This could happen when the program is being used for the first time and a geographic hierarchy of locations has not yet been created. Before a Locality record can be created, it is necessary to first create a National Community record, a Region record and a Cluster record in that particular order. If a geographic hierarchy has already been created, the program may not allow you to create a new

locality record if the name of that locality already exists in the program within the same geographic hierarchy.

**...the program does not allow you to create a new Cluster record?**

This would happen when the program is being used for the first time and a geographic hierarchy of locations has not yet been created. Before a Cluster record can be created, it is necessary to first create a National Community record and a Region record in that particular order. If a geographic hierarchy has already been created, the program may not allow you to create a new cluster record if the name of that cluster already exists in the program within the same geographic hierarchy.

**...the program does not allow you to create a new Region record?**

This would happen when the program is being used for the first time and a geographic hierarchy of locations has not yet been created. Before a Region record can be created, it is necessary to first create a National Community record. If a geographic hierarchy has already been created, the program may not allow you to create a new region record if the name of that region already exists in the program within the same geographic hierarchy.

**...an existing activity has ended?**

If an existing activity has ended, the record of that activity should be closed. Use the Activity Finder to search for and open the activity record, and then check the “Completed” checkbox on the Basic Information tab and enter a completion date for the activity. Review the Participants tab to include only those participants who have completed the study of the book. By default all participants listed are marked as having successfully completed the book. Save and close the record afterwards.

**...a person moves from one locality to another within the cluster for which you are responsible?**

When a person moves from one locality to another, you can search for the record of that individual by using the Individual Finder. After you have opened the record, make the appropriate changes to the Locality and Home Address fields on the Basic Information tab. Save and close the record afterwards.

**...a person is no longer residing in the cluster for which you are responsible?**

At the moment there is no facility to export an individual record in the database to send to the coordinator in another cluster. Functionality to support this is currently being developed and will be available in a subsequent version of the program. For the time being, you are encouraged not to delete the individual record from the database.

**...the *Find* button on one of the Finders is disabled?**

Before the *Find* button becomes enabled, it is necessary to first select the “Find an [activity / individual / location] by....” option.

**...the *Open* button on one of the Finders is disabled?**

The *Open* button only becomes enabled when a record is selected in the finder.



### **...an Exception Report is generated?**

An “Exception Report” is generated automatically when an error occurs in the program. This can be during installation, or during normal use of the program. When such a report is generated, and you are connected to the Internet, you are encouraged to click the *Email* button, which generates a message that can be sent to the email address [srpi@bwc.org](mailto:srpi@bwc.org). If you are not connected to the Internet, use the *Save* button to save the message on your computer or an external drive, and then later send the file by email to [srpi@bwc.org](mailto:srpi@bwc.org).

### **...you accidentally moved the junior youth book currently studied to the study history?**

When the “Move to Study History” button is clicked prematurely and the junior youth book hasn’t actually been completed yet by the group, it’s not possible to reverse the action in a single step. Rather, the same book and start date would need to be entered again under “currently studying”, and then, in the Participants tab, the current book would need to be selected and the list of participants copied from the book that had accidentally been moved to the study history. After this is done, the book that was accidentally moved to study history can be removed using the [Remove](#) link.

### **...a facilitator of an activity is replaced while the activity is still going on?**

Open the record of the activity using the Activity Finder, and, on the Basic Information tab, associate the record of the new facilitator with the activity using the *Add Facilitator* button. To keep both the previous and the current facilitator associated with the activity, simply leave both records there and ensure that the boxes in front of their names are checked.

If you do not wish to keep the record of the previous facilitator associated with the activity, click on the [Remove](#) link to sever the association. Alternatively, you can just uncheck the box in front of the name of the previous facilitator. In both these cases, the activity will no longer be displayed in the Study History tab of the Individual record of the previous facilitator.

### **...a participant does not complete a grade or book?**

By default, when an activity is marked as completed, the participants associated with the activity are marked as having successfully completed that activity. If a participant has dropped out of an activity, or otherwise not successfully completed the grade or book, the Completed checkmark next to his or her record on the Participant tab of an activity should be unchecked, or the entire record removed.

### **...the *Copy Participants* button in the Participants tab of the record for a junior youth group is disabled?**

In order to copy participants from another book into the selected book, you would need to remove all the individuals participating in the selected book. By doing this, the button will become enabled again. Once participants are copied from another book, you can use the add participants button to re-add those participants that may have been removed.

**...you want to search only for activities that are currently in progress?**

On the **Institute records > Activities** page, there is a tab that works like the activity finder except that it only shows activities that are currently in progress.

**...one or more records you have previously entered into the program seem to have disappeared or can no longer be accessed?**

If this happens, it is possible that the database's search index is no longer working correctly and needs to be rebuilt. To do this, you can use the *Rebuild Search Index* button which can be found under **Home** in the Setup Options. If rebuilding the search index doesn't solve the problem, it is possible that a more serious error has occurred. In this case, you are encouraged to bring this to the attention of the person named by the National Spiritual Assembly as the contact person for the implementation of the program in your country, who in turn will be able to refer the problem to the Department of Statistics at the Bahá'í World Centre.

## **6 Features to be Added Later**

### **Sharing data between coordinators at the cluster level**

The current version of the program supports the maintenance of data by only one coordinator in each cluster, and there is no facility to share the data maintained in the program between various coordinators. It is anticipated that a subsequent version of the program would provide support for a scheme of coordination in which data can be exchanged between up to three institute coordinators in each cluster.

### **Sharing data between geographic levels**

The current version of the program does not support the transfer of data from the cluster level to the level of the region or the national community, or the international level. It is anticipated that a subsequent version of the program would provide such support. For the time being, therefore, the program is to be used at the cluster level only.

It is possible for data on multiple clusters to be maintained in the program. However, there is currently no support for the transfer of that information from one geographic level to the next.

### **Marking individuals as no longer residing in a cluster**

The current version of the program does not allow for records of individuals to be marked as “no longer residing in the cluster”, for example, as a result of an individual moving out of the cluster or having passed away. This is a feature that will be added in a subsequent version of the program.

Since the program supports the generation of historical reports, there would generally never be a need to delete records from the program, unless, of course, a record was erroneously created to begin with.

### **Merging records in the database**

Functionality to support the merging of duplicate records is currently being developed and will be available in a subsequent version of the program.