Cemetery Manual

UAN
UNIFORM
ACCOUNTING
NETWORK

OHIO AUDITOR OF STATE
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CEMETERY INTRODUCTION

Welcome to the Uniform Accounting Network program. This manual is a reference guide for the UAN Cemetery Software, a component of the Uniform Accounting Network. The manual contains procedures for the operation of the UAN Cemetery Software applications; it does not address general governmental procedures.

It is not necessary to have previous computer experience to use the system. The goal in developing the applications and this manual is to produce a uniform system for Ohio local governments that is easy to use regardless of computer experience.

The structure of the manual has been designed to guide you through the UAN Cemetery Software application. The manual has been divided into three main parts: **Transactions, Maintenance** and **Reports & Statements**. The sections within each part follow the layout of the menu options in the software.

TRANSACTIONS

The Transactions part of the UAN Cemetery Manual contains a section for each application listed on the Transaction menu of the UAN Cemetery Software. These applications include Burials, Owners and Plot Transactions which has Buy Back, Deeds & Transactions, Sell and Transfer functionality. In Transactions, you will find the applications you will access most frequently to complete your everyday duties in your role as Cemetery Sexton.

MAINTENANCE

The Maintenance section of the UAN Cemetery Manual contains a part for each area located on the Maintenance menu of the UAN Cemetery Software. These areas include Cemetery activities such as Burial Details, Cemetery Design, Entity Information, Plot Detail, Structures, and Wars as well as Systems activities covering Backups, Change Password, Entity Setup, Re-index Database, User Preferences, and Users. In Maintenance, you will find all of the areas needed to establish the foundation during the initial setup of the UAN Cemetery Software and to perform ongoing housekeeping tasks.

REPORTS & STATEMENTS

The Reports & Statements section of the UAN Cemetery Manual contains a section for each report grouping listed on the Reports and Statements menu of the UAN Cemetery Software. These include reports for Bequests, Burial Details, Cemetery Summary, Grave, Plot Details, Sales and Fees, Transaction Log and Veteran reports. Included are

descriptions of the various log, detail and summary reports that can be generated by the software.

SCREEN NAVIGATION

At the top and/or bottom of each screen there are button selections that are regularly used to choose the action to be taken with the selected item(s). Not all buttons may be available on a specific screen. On any given screen, required fields to save a record will display as green; optional fields, which can be edited at a later time if desired, are displayed as white.

The buttons are defined below:

Add – Used to add transactions or maintenance items to the system.

Activate – Used to activate a selected record.

Deactivate – Used to deactivate a selected record.

Edit – Used to modify a selected record.

Delete – Used to remove a selected record (if no other historical transactions have occurred against the record).

Display – Used to display a selected record on the screen for review. The system will not permit changes to be made to the information being displayed.

Close – When this button is selected on a transaction screen, the system closes the screen. The screen can also be closed by clicking on the 'x' located on the tab (top left of transaction screen) beside the name of the transaction area.

Map – Used to plot and display the location of a record containing Longitude and Latitude coordinate information properly formatted using WGS84 Decimal Degrees (for Example, The Ohio Statehouse coordinates are Latitude: 39.961176 Longitude: -82.998794) using ArcGIS. You can then further Save the image displayed or Print the image as shown on the screen.

TRANSACTIONS

The sections in this part of the manual are:

- **Burials**

- **Owners**

- **« Plot Transactions**

    o   **Buy Back**

    o   **Deeds & Transactions**

    o   **Sell**

    o   **Transfer**

BURIALS

OVERVIEW

Information for a burial can be added for a plot and information for an existing burial can be edited, deleted or displayed. To edit, delete or display information for a burial, the user can manually search the list grid for the burial or the list grid can be filtered to limit the burials that are displayed.

DELETE

Burial information can be deleted, but the history of the burial will be saved.

STEPS TO ACCESS

Cemetery → Transactions → Burials

You can Add, Edit, Delete or Display a Burial as well as close the Burial window.

DATA REQUIREMENTS

Field	Type	Required	History	Comment
Plot	Label	N/A	N/A	
Reset Grid Filters	Button	N/A	N/A	**Add:**

				Clears all grid column filters on Plots Pick List **Edit or Display:** Hidden
Plot	Pick List	N/A	N/A	^ Plots Pick List Displays formatted Plot name Status: **Occupied**: If a burial exists for the plot **Purchased**: If the latest owner is not the cemetery **Available**: If the latest owner is the cemetery **Edit or Display:** Read Only
Grave	Group Box	N/A	N/A	
Status	Pick List (20)	No	No	^ Grave Status Pick List Pick List of Grave Statuses Display: *GraveStatuses* *GraveStatusName* Save: *Burials* *CodeIDGraveStatus*
Permit #	Text (15)	No	No	*Burials* *PermitNumber*
(NL)	Label	N/A	N/A	"Select decedent from Owner box OR manually enter decedent on the tab below."
Owner	Pick List (100)	No	N/A	^ Owner Pick List Pick list of active Owners An Owner selection is not required

				If and Owner is selected from the Pick List, default the values for First, Middle, Last and Suffix from the selected Owner Not Saved
Decedent	Page Tab	N/A	N/A	
Name	Group Box	N/A	N/A	
First	Text (30)	Yes	Yes	Default the value for First from the selected Owner when an Owner is selected from the Pick List *Burials* *FirstName*
Middle	Text (30)	No	Yes	Default the value for Middle from the selected Owner when an Owner is selected from the Pick List *Burials* *MiddleName*
Last	Text (30)	Yes	Yes	Default the value for Last from the selected Owner when an Owner is selected from the Pick List *Burials* *LastName*
Suffix	Text (4)	No	Yes	Default the value for Suffix from the selected Owner when an Owner is selected from the Pick List *Burials* *Suffix*
Maiden	Text (30)	No	Yes	*Burials* *MaidenName*
Details	Group Box	N/A	N/A	
Birth	Label	N/A	N/A	See MM, DD and YYYY
MM (NL)	Numeric (2)	Yes*	No	*Required only if DD is not blank 1 – 12 (or blank)

				Burials *BirthMonth*

DD (NL)	Numeric (2)	No	No	1 – 31 (or blank)
				
				If DD is not blank and MM is 2, 4, 6, 9, or 11, then DD cannot be 31
				
				If DD is not blank and MM is 2, then DD cannot be 30
				
				If DD is not blank and MM is 2 AND either A **or** B is true:
				    A. YYYY is not divisible by 4
				    B. YYYY is divisible by 100 but not 400
				then DD cannot be 29
				
				Burials
				BirthDay

YYYY (NL)	Numeric (4)	Yes*	No	*Required only if MM is not blank 1600 – 2100 (or blank) *Burials* *BirthYear*
Death	Label	N/A	N/A	See MM, DD and YYYY
MM (NL)	Numeric (2)	Yes*	No	*Required only if DD is not blank 1 – 12 (or blank) *Burials* *DeathMonth*
DD (NL)	Numeric (2)	No	No	1 – 31 (or blank) If DD is not blank and MM is 2, 4, 6, 9, or 11, then DD cannot be 31 If DD is not blank and MM is 2, then DD cannot be 30 If DD is not blank and MM is 2 AND either A **or** B is true: A. YYYY is not divisible by 4

				B. YYYY is divisible by 100 but not 400 then DD cannot be 29 *Burials* *DeathDay*
YYYY (NL)	Numeric (4)	Yes*	No	*Required only if MM is not blank 1600 – 2100 (or blank) *Burials* *DeathYear*
Burial	Label	N/A	N/A	See MM, DD and YYYY
MM (NL)	Numeric (2)	Yes*	No	*Required only if DD is not blank 1 – 12 (or blank) *Burials* *BurialMonth*
DD (NL)	Numeric (2)	No	No	1 – 31 (or blank) If DD is not blank and MM is 2, 4, 6, 9, or 11, then DD cannot be 31 If DD is not blank and MM is 2, then DD cannot be 30 If DD is not blank and MM is 2 AND either A **or** B is true: A. YYYY is not divisible by 4 B. YYYY is divisible by 100 but not 400 then DD cannot be 29 *Burials* *BurialDay*
YYYY (NL)	Numeric (4)	Yes*	No	*Required only if MM is not blank 1600 – 2100 (or blank) *Burials* *BurialYear*
Age	Numeric (3)	No	No	Minimum value is 0 (or blank) *Burials* *Age*

Sex (NL)	Radio Button (3)			• Male (SexMale Value = M) • Female (SexFemale Value = F) • Unknown (SexUnknown Value = U) (Default) *Burials* *Sex*
Resident	Check Box	No	No	*Burials* *IsResident*
Veteran	Check Box	No	No	When Veteran is checked the Wars grid is available to add or delete wars When Veteran is not checked the Wars grid is Read Only and blank *Burials* *IsVeteran*
Communicable Disease	Check Box	No	No	*Burials* *IsCommunicableDisease*
Relation to Owner:	Pick List / Text (15)	No	No	^ Relation to Owner Pick List Self-building list of relationships of the decedent to the owner(s). Pick from the list of saved relationships or allow client to enter a new relationship. *Burials* *OwnerRelationship*
Fees	Group Box	N/A	N/A	
Open / Close	Money (11,2)	No	No	Minimum value is 0 (or blank) *Burials* *OpenCloseFeeAmount*
Paid	Check Box	No	No	*Burials* *IsOpenCloseFeePaid*
Exhumation	Money (11,2)	No	No	Minimum value is 0 (or blank)

				Burials *ExhumationFeeAmount*
Paid	Check Box	No	No	*Burials* *IsExhumationPaid*
Other	Money (11,2)	No	No	Minimum value is 0 (or blank) *Burials* *OtherFeeAmount*
Paid	Check Box	No	No	*Burials* *IsOtherFeePaid*
Bequest	Money (11,2)	No	No	Minimum value is 0 (or blank) *Burials* *BequestAmount*
Paid	Check Box	No	No	*Burials* *IsBequestPaid*
Bequest Date	Label	N/A	N/A	See MM, DD, YYYY
MM (NL)	Numeric (2)	Yes*	No	*Required only if DD is not blank 1 – 12 (or blank) *Burials* *BequesMonth*

DD (NL)	Numeric (2)	No	No	1 – 31 (or blank)
				
				If DD is not blank and MM is 2, 4, 6, 9, or 11, then DD cannot be 31
				
				If DD is not blank and MM is 2, then DD cannot be 30
				
				If DD is not blank and MM is 2 AND either A **or** B is true:
				  A. YYYY is not divisible by 4
				  B. YYYY is divisible by 100 but not 400
				then DD cannot be 29
				
				Burials
				BequestDay

YYYY (NL)	Numeric (4)	Yes*	No	*Required only if MM is not blank 1600 – 2100 (or blank) *Burials*

				BequestYear
Details	Memo (512)	No	No	Does not accept newline character *Burials* *BequestInformation*
Death	Group Box	N/A	N/A	
Cause	Memo (512)	No	No	Does not accept newline character *Burials* *CauseOfDeath*
Place	Memo (512)	No	No	Does not accept newline character *Burials* *PlaceOfDeath*
Wars	Group Box	N/A	N/A	
Wars Grid (NL)	Grid	N/A	N/A	Grid is Read Only and blank when Veteran is not checked, otherwise allow to add and delete wars Grid does not have a Check Box column Do not allow a war to be added multiple times
• Name	Pick List / Text (40)	No	No	^ War Pick List (Add row) Column (Text) is Read Only See Back End data for saving instructions Display: *Wars* *WarName* Save: *BurialWarLinks* *WarID*
• Delete	Icon	N/A	N/A	
Additional Information	Page Tab	N/A	N/A	

Show	Radio Button (3)	No	N/A	• All Items (Default) • Items With Values ~~(Default)~~ Not Saved
(NL)	Label	N/A	N/A	"These fields are established in: Maintenance > Burial Details"
Burial Details Grid (NL)	Grid	N/A	N/A	No Check Box column **Items With Values:** Include all Burial Additional Details for this Burial that have a value **All Items:** Include all active Burial Additional Details (with or without a value for this Burial) plus any inactive Burial Additional Details with a value for this Burial
• Name ~~Description~~	Text (40)	N/A	N/A	Read Only See Back End data for saving instructions Display: *BurialAdditionalDetails* *BurialAdditionalDetailName* Save: *BurialAdditionalDetailValues* *BurialAdditionalDetailID*
• Value	Memo (512)	No	No	See Back End data for saving instructions *BurialAdditionalDetailValues* *DetailValue*
Comments:	Memo (512)	No	No	Does not accept newline character *Burials* *Comments*

Plot's Existing Burials	Label	N/A	N/A	
Existing Burials Grid (NL)	Grid	N/A	N/A	All Grid columns are Read Only For display purposes only (not Saved) No Check Box column Burials (other than this Burial) for this Plot
• Last Name	Text (30)	N/A	N/A	*Burials* *LastName*
• First Name	Text (30)	N/A	N/A	*Burials* *FirstName*
• Middle Name	Text (30)	N/A	N/A	*Burials* *MiddleName*
• Suffix	Text (4)	N/A	N/A	*Burials* *Suffix*
• Maiden Name	Text (30)	N/A	N/A	*Burials* *MaidenName*
• Birth Date	Text (10) ~~Date~~	N/A	N/A	Formatted MM/DD/YYYY *Burials* *BirthMonth* *BirthDay* *BirthYear*
• Death Date	Text (10) ~~Date~~	N/A	N/A	Formatted MM/DD/YYYY *Burials* *DeathMonth* *DeathDay* *DeathYear*
• Burial Date	Text (10) ~~Date~~	N/A	N/A	Formatted MM/DD/YYYY *Burials* *BurialMonth* *BurialDay* *BurialYear*
• Veteran	Text (3)	N/A	N/A	If IsVeteran is 1, Then 'Yes', Else 'No' *Burials* *IsVeteran*
• Grave Status	Text (20)	N/A	N/A	*GraveStatuses* *GraveStatusName*

Files	Page Tab	N/A	N/A	
Files	Group Box	N/A	N/A	
Add	Button	N/A		Opens file browser to choose a file File must be less than 10MB if NOT an image If file is an image type: If the height or width is greater than 4,000px, rescale the longest side to 4,000px (maintain aspect ratio) and store as JPG compressed to 70% quality. If height & width are both less than 4,000px and file type is JPG (or JPEG), store file as-is. If height & width are both less than 4,000px and file type is NOT JPG or JPEG, convert file to JPG at 70% quality. *BurialFiles* *BurialFile*
Files	Grid			Single-clicking a row displays a preview of the file in the Preview image box Double-clicking a row opens the file with the default program for that file type Delete with row selected to delete a file
(NL)	Label	N/A	N/A	Single click a row to preview. Double click to open the file. Click and press Delete key to delete the file.

File Name		N/A		Filename of imported file *BurialFiles* *BurialFileName*
Size		N/A		File size in KB (in format ###,### KB) Not saved
Date Modified		N/A		Modified date of the file *BurialFiles* *BurialFileModifiedDate*
Preview (NL)	Image	N/A		Shows a preview of any clicked-on file row
Created By	Text (20)	N/A	No	Read Only Only visible in edit and display modes Display: UserName Saved: UserID *Burials.CreatedByUserID* *Users.UserName*
Created Date	Date	N/A	No	Read Only Only visible in edit and display modes *Burials* *CreatedDateTime*
Modified By	Text (20)	N/A	Yes	Read Only Only visible in edit and display modes Display: UserName Saved: UserID *Burials.UpdatedByUserID* *Users.UserName*

Modified Date	Date	N/A	Yes	Read Only Only visible in edit and display modes *BrrialFiles* *UpdatedDateTime*

HOW TO ADD A BURIAL

Step 1: Click on the **Add** button.

Step 2: Select the **Plot** which will be used for the Burial from the drop down menu.

Step 3: Select the **Status** designation(s) for the Burial from the drop down menu. (Buried, Cremated, Disinterred, Reserved or Vandalized).

Step 4: Enter the **Permit** number.

Step 5: Select the decedent from the **Owner** drop down menu or manually enter Decedent information within the tab below.

Step 6: *Decedent Tab:* Enter the Decedent (person to be interred) Information.

Manually enter Decedent information within the tab or review/edit the information as entered if the Owner of the plot was selected above.

Name Section

Step 1: Enter **First Name** (Required).

Step 2: Enter **Middle Name.**

Step 3: Enter **Last Name** (Required).

Step 4: Enter **Suffix.**

Step 5: Enter **Maiden** (pre-marriage) name if desired.

Details Section

Step 1: Enter **Birth Date** of the Decedent.

Step 2: Enter **Death Date.**

Step 3: Enter **Burial Date.**

Step 4:   Enter **Age** at time of death.

Step 5:   Select if Decedent was a **Male, Female or Unknown.**

Step 6:   Select if Decedent was a **Resident.**

Step 7:   Select if Decedent was a **Veteran**. War Service can be noted in the **Wars** section below.

Step 8:   Select if Decedent had a **Communicable Disease** at the time of Death.

Step 9:   Select or enter the **Relation to Owner** by making a selection from the drop down menu or by manually entering the information.

Fees Section

Step 1:   Enter any **Open/Close** Fee. Mark the checkbox if the fee has been paid.

Step 2:   Enter any **Exhumation** fee. Mark the checkbox if the fee has been paid.

Step 3:   Enter any **Other Fees** Fee. Mark the checkbox if the fees have been paid.

Step 4:   Enter any **Bequest** amount. Mark the checkbox if the amount has been paid.

        Step 4a: Enter the **Bequest Date.**

        Step 4b: Enter **Details** regarding the Bequest in the memo field provided.

Death Section

Step 1:   Enter the **Cause** of Death within the memo field.

Step 2:   Enter the **Place** of Death within the memo field.

Wars Section

Step 1:   It the Decedent has been indicated as a Veteran by marking the checkbox above, the **Wars** in which the Decedent participated can be added.

        Step 1a: Select the **War** applicable to the Decedent and click the Up arrow. It will be added to the Burial information. Proceed to add each War applicable.

Step 2:   *Additional Information Tab:* This tab will show any available Additional Information regarding:

        Step 2a: **Burial Details** as established within Maintenance can be entered.

> **Step 2b:** **Comments** regarding the Burial can be entered if desired.

> **Step 2c:** Any previous Burials in the plot can be reviewed at this time.

Step 3: *Files Tab:* This tab will show any available Files, such as photos or documents associated with the burial.

Step 4: Click the **Save** button to save the data entered and **Close** to exit the form.

SUGGESTED REPORTS & STATEMENTS

Steps to Access: Cemetery → Reports and Statements → Grave Reports

> Graves Occupied Summary

> Graves Occupied Detail

> Graves Occupied Additional Detail

Steps to Access: Cemetery → Reports and Statements → Burial Details Report

OWNERS

OVERVIEW

An Owner in the UAN software is an individual that can own one or more burial plots.

DELETE

Only owners that have never purchased a burial plot may be deleted.

STEPS TO ACCESS

Cemetery → Transactions → Owners

DATA REQUIREMENTS

Field	Type	Required	Additional Information
Name			
First	Text (30)	Yes	
Middle	Text (30)	No	
Last	Text (30)	Yes	
Suffix	Text (4)	No	
Status	Radio Button (2)	N/A	
Address	Group Box		
Line 1	Text (40)	No	
Line 2	Text (40)	No	
City	Text (25)	No	
State	Text (2)	No	
ZIP	Zip (5,4) or (3,3)	No	
Email	Text (40)	No	
Contact	Group Box		
Phone	Phone (3,3,4)	No	
Ext	Numeric (4)	No	
Cell	Phone (3,3,4)	No	
Residing Entity	Group Box		
Name	Text (40)	No	
Type	Text (40)	No	
County	Text (40)	No	

State	Text (40)	No	
Comments	Memo (512)	No	
Plots Owned	Group Box		
Plots (NL)	Grid		
• Deed Number	Text (15)	N/A	
• Purchase Date	Text (10)	N/A	
• Status	Text (7)	N/A	
• Cemetery	Text (40)		
• Structure Type Name …	Text (40)		
• Grave	Text (40)		
Created By	Text (20)	N/A	
Created Date	Date	N/A	
Modified By	Text (20)	N/A	
Modified Date	Date	N/A	

HOW TO ADD AN OWNER

Step 1:   Click on the **Add** button.

Name Section

Step 1:   Enter **First Name** (Required).

Step 2:   Enter **Middle Name.**

Step 3:   Enter **Last Name** (Required).

Step 4:   Enter **Suffix.**

Step 5:   Enter **Status** (active or inactive).

Address Section

Step 1:   Enter **Address Line 1** of the Owner.

Step 2:   Enter **Address Line 2** of the Owner.

Step 3:   Enter **City.**

Step 4:   Enter **State.**

Step 5:   Enter **ZIP** code.

Step 6:   Enter **Email** address.

Contact Section

Step 1:   Enter **Phone** number of the Owner.

> **Step 1a:** Enter **Ext**ension information for the phone number if necessary.

Step 2:   Enter **Cell** Phone number of the Owner.

Residing Entity Section

Step 1:   Enter the **Name** of the Owner's residing entity.

Step 2:   Enter the **Type** (Township, Village, or City) of the Owner's residing entity.

Step 3:   Enter the **County** of the Owner's residing entity.

Step 4:   Enter the **State** of the Owner's residing entity.

NOTE: Residing Entity information can be defaulted in if entered in Cemetery→ Maintenance→ Entity Setup→ Owners. **When adding new Owners ONLY.**

Comments Section

Step 1:   Enter **Comments** regarding the Owners at this time.

Step 2:   Click the **Save** button to save the data entered and **Close** to exit the form.

NOTE: *Plots Owned field:*

When in Edit or Display mode, this field will display any Plots owned by the selected owner. **This field will be blank when Adding a new Owner.**

SUGGESTED REPORTS & STATEMENTS

Steps to Access: Cemetery → Reports and Statements → Grave Reports

> Graves Purchased

Steps to Access: Cemetery → Reports and Statements → Sales and Fees Reports

> Sales

BUY BACK

OVERVIEW

Plots with no burials can be bought back by the cemetery.

STEPS TO ACCESS

Cemetery → Transactions → « Plot Transactions – Buy Back

DATA REQUIREMENTS

Field	Type	Required	Comment
Deed Number	Text (15)	No	Read Only and Blank for Buy Back
Date			
MM (NL)	Numeric (2)	Yes*	*Required only if DD is not blank 1 – 12 (or blank)
DD (NL)	Numeric (2)	No	1 – 31 (or blank)
YYYY (NL)	Numeric (4)	Yes*	*Required only if MM is not blank
Paid	Radio Button (2)	N/A	
Price Per Plot	Money (11,2)	No	Read Only and Blank for Buy Back
Plots Selected	Numeric (5)	N/A	Read Only
Total Price	Money (11,2)	N/A	Read Only Calculated = Price Per Plot x Plots Selected
Comments	Text (512)	No	
Seller(s)			
Sellers Panel (NL)	Panel	N/A	
Sellers	Grid	N/A	All columns are Read Only Displays owner(s) of selected plots in Plots grid. Blank if no plots are selected
• First	Text (30)	N/A	
• Middle	Text (30)	N/A	
• Last	Text (30)	N/A	
• Suffix	Text (4)	N/A	
• City	Text (25)	N/A	
• State	Text (2)	N/A	
Plot(s)	Group Box	N/A	

(NL)	Label	N/A	
Cemetery	Drop Down (40)	Yes	
Reset Grid Filters	Button	N/A	Resets all grid column filters and clears any Plot selections
Plots (NL)	Grid	Yes*	All columns in the grid are read only (except the Checkbox column) * At least one Plot
• Deed Number	Text (15)	N/A	Read Only
• Purchase Date	Text (10)	N/A	Read Only
• Structure Type Name …	Text (24)	N/A	Read Only
• Grave	Text (24)	N/A	Read Only

HOW TO BUY BACK PLOTS

Step 1:   Enter **Date**.

Step 2:   Enter **Comments** if any.

Sellers Tab Section

Step 1:   Select **Cemetery.**

Step 2:   Select **Plot(s)**. Multiple plots can be selected but they must all have a single owner.

Step 3:   Review **Seller(s)** information which populated once a plot(s) was selected.

Step 4:   Select **Save** and then **Close**.

DEEDS AND TRANSACTIONS

OVERVIEW

Information about the latest plot transaction can be updated or displayed for any plot and a deed can be printed or reprinted for plots that have an owner. Deeds can be printed with one plot per deed, or with multiple plots on a deed if all the selected plots have the same owner(s) and are in the same cemetery. (One plot per deed is the only option when the plots do not all have the same owner(s) or the plots are not all in the same cemetery.) When printing one plot per deed and multiple plots are selected, after a deed is printed the next plot will be loaded automatically. There is also an option to print a blank deed.

STEPS TO ACCESS

Cemetery → Transactions → « Plot Transactions – Deeds and Transactions

DATA REQUIREMENTS

Field	Type	Required	Comment
Owners	Numeric (3)	Yes*	*Required and Editable for Print Blank Read Only for Print Deed **Print Blank:** Number of blank lines to print in the owner section of the deed Defaults to 1 Cannot be less than 1 **Print Deed:** Calculate = Number of owners in owners grid
Plots	Numeric (3)	Yes*	*Required and Editable for Print Blank Read Only for Print Deed **Print Blank:** Number of blank lines to print in the plots section(s) of the deed Defaults to 1 Cannot be less than 1 **Print Deed:** Calculate = Number of plots in plots grid
Signatories	Numeric (3)	Yes*	*Required and Editable for Print Blank

			Read Only for Print Deed **Print Blank:** Number of blank lines to print in the signatories section(s) of the deed Defaults to the greater of 3 or the number of active Officials Cannot be less than 1 **Print Deed:** Calculate = Number of officials selected in signatories grid
Deed Number	Text (512)	No	Hidden for Print Blank Editable for Print Deed, but does not accept newline character. **Print Deed:** Defaults to all unique deed numbers for plots in plots grid (comma-space separated) Ordered by default plot grid order
Signatories			
Entity	Group Box		
Name	Text (30)	N/A	Read Only
Type	Text (8)	N/A	Read Only
County	Text (10)	N/A	Read Only
Plats Information			
Entity Full Name	Text (40)	N/A	Read Only
Plats Location	Text (40)	N/A	Read Only
Signatories			
• Checkbox	Checkbox	N/A	Selected Officials to print on deed Default unchecked The selected signatories will remain selected when switching between deeds.
• Name	Text (40)	N/A	Read Only Not Saved
• Title	Text (40)	N/A	Read Only Not Saved
Date	Date	No	Date to print on Deed Not Saved
Owners / Plots			
Sum			

Sum Edit (NL)	Radio Button (2)	N/A	
Sum (NL)	Text (512)	No	Read Only if Sum Edit is "Use Default"
Paid By	Group Box		
Paid By Edit (NL)	Radio Button (2)	N/A	
Paid By (NL)	Text (1024)	No	Read Only if Paid By Edit is "Use Default"
Heirs	Radio Button (3)	Yes	Read Only and set to "Their" if multiple owners in owners grid
Owners			
• Name	Text	N/A	Read Only
• Address	Text	N/A	Read Only
• Entity	Text (40)	N/A	Read Only
• Type	Text (40)	N/A	Read Only
• County	Text (40)	N/A	Read Only
• State	Text (40)	N/A	Read Only
Plots			
• Deed Number	Text (15)	N/A	Read Only
• Purchase Date	Text (10)	N/A	Read Only Formatted MM/DD/YYYY
• Cemetery	Text (40)	N/A	Read Only Not Saved
• Structure Type Name …	Text (40)	N/A	Read Only Not Saved
• Grave	Text (40)	N/A	Read Only
Deed Format			
Deed Format (NL)	Radio Button (2)	N/A	
(NL)	Label	N/A	Defaults can be edited in: Maintenance →Entity Setup under the Deed Format tab
Header	Group Box		
Header Edit (NL)	Radio Button (2)	N/A	Editable if Deed Format is "Override Below"
Header (NL)	Memo (512)	Yes	Read Only when "Use Defaults"

Terms & Conditions			
Terms & Conditions Edit (NL)	Radio Button (3)	N/A	Editable if Deed Format is "Override Below"
Terms & Conditions (NL)	Memo (2048)	Yes	Read Only when "Use Defaults"
Paper Size			
(NL)	Radio Button (2)	N/A	
Other	Group Box		
Print Notary Block	Check Box	N/A	
Created By	Text (20)	N/A	Read Only
Created Date	Date	N/A	Read Only
Modified By	Text (20)	N/A	Read Only
Modified Date	Date	N/A	Read Only

HOW TO PRINT A BLANK DEED

Step 1: Click **Print Blank** button.

HOW TO EDIT A TRANSACTION

A previously completed transaction can be edited to revise information such as:

- o **Deed Number.**

- o **Date**.

- o If Plot was **Paid** for. (Yes or No).

- o **Price per Plot**.

- o **Comments**.

Step 1:   Select the **Plot(s)** desired to edit.

Step 2:   Click the **Edit** button.

Step 3:   Revise as necessary then click the **Save** button.

HOW TO PRINT A DEED

You will typically need to print a Deed to recognize and make official a plot sale or transfer. Please note you can only print deeds for plots that have Owners.

Step 1:   Select the **Plot(s)** desired to print deed.

Step 2:   Click on the **Print Deed** button.

Signatories Tab Section

Step 1:   Review the **Deed** Number to make sure it is correct. It can also be revised at this time.

Step 2:   Select the **Officials** who will be the **Signatories** who will sign the deed.

Step 3:   Enter the **Date** of Signatories' execution.

Owners/Plots Tab Section

Step 1:   The **Sum** field can be overridden by using the radio button indicating such and then that field can be edited as desired.

Step 2:   The **Paid by** field can be overridden by using the radio button indicating such and then that field can be edited as desired. Heir choices can be made to indicate the proper pronoun to use within the deed (His, Her, Their)

Step 3:   Review **Owner** and **Plot** information at this time to enhance accuracy.

Deed Format Tab Section

Step 1:   Review defaults which were established in **Maintenance – « System - Entity Setup.**

Step 2:   Selecting the Override radio button allows you to revise the Header and/or Terms and Conditions noted on the deed.

Step 3:   Review the **Paper Size, Letter or Legal**

Step 4:   Review the Other- Print Notary Block field to determine if default needs to be revised.

Step 5:   You may now proceed to **Preview** the appearance of the deed, **Print** it on the paper selection previously indicated or **Close** out of the screen.

SELL

OVERVIEW

Plots can be sold to one or more owners.

STEPS TO ACCESS

Cemetery → Transactions → « Plot Transactions – Sell

DATA REQUIREMENTS

Field	Type	Required	Comment
Deed Number	Text (15)	No	
Date			
MM (NL)	Numeric (2)	Yes*	*Required only if DD is not blank 1 – 12 (or blank)
DD (NL)	Numeric (2)	No	1 – 31 (or blank)
YYYY (NL)	Numeric (4)	Yes*	*Required only if MM is not blank
Paid	Radio Button (2)	N/A	
Price Per Plot	Money (11,2)	No	
Plots Selected	Numeric (5)	N/A	Read Only
Total Price	Money (11,2)	N/A	Read Only Calculated = Price Per Plot x Plots Selected
Comments	Text (512)	No	
Purchaser(s)			
Purchaser(s)	Grid		
• Primary Owner	Radio Button	N/A	
• Purchaser	Drop Down^	Yes*	
• City	Text (25)	N/A	Read Only
• State	Text (2)	N/A	Read Only
• Add New	Button	N/A	Only shown in Add row
• X	Button	N/A	Removes row from grid
Plot(s)	Group Box	N/A	
(NL)	Label	N/A	
Cemetery	Drop Down (40)	Yes	

Reset Grid Filters	Button	N/A	Resets all grid column filters and clears any Plot selections
Plots (NL)	Grid	Yes*	All columns in the grid are read only (except the Checkbox column) * At least one Plot
• Deed Number	Text (15)	N/A	Read Only
• Purchase Date	Text (10)	N/A	Read Only
• Structure Type Name …	Text (24)	N/A	Read Only
• Grave	Text (24)	N/A	Read Only

HOW TO SELL A PLOT

Step 1:   Enter the **Deed Number.**

Step 2:   Enter **Date**.

Step 3:   Select if Plot was **Paid** for. (Yes or No).

Step 4:   Enter **Price per Plot**.

Step 5:   Enter **Comments** if any.

Purchasers Tab Section

Step 1:   Select a **Primary Owner.** Click the up arrow to place owner in the grid. If the owner does not already exist in the system, click the Add New field to open the Add Owner form. Select any additional **Owners**, if applicable.

Step 2:   Select **Cemetery.**

Step 3:   Select **Plot(s).** Multiple plots can be selected to sell at once.

Step 4:   Click **Save.**

Step 5:   A message will appear. **"Print a deed for the selected plots?"** If yes, the Print Deed form will display. See the How to Print a Deed instructions under the Deeds and Transactions section of this manual.

TRANSFER

OVERVIEW

Plots can be transferred from a current owner to a new owner. Plots with one or more burials cannot be bought back by the cemetery or transferred to new owners.

STEPS TO ACCESS

Cemetery → Transactions → « Plot Transactions – Transfer

DATA REQUIREMENTS

Field	Type	Required	Comment
Deed Number	Text (15)	No	
Date			
MM (NL)	Numeric (2)	Yes*	*Required only if DD is not blank 1 – 12 (or blank)
DD (NL)	Numeric (2)	No	1 – 31 (or blank)
YYYY (NL)	Numeric (4)	Yes*	*Required only if MM is not blank
Paid	Radio Button (2)	N/A	
Price Per Plot	Money (11,2)	No	
Plots Selected	Number (5)	N/A	Read Only
Total Price	Money (11,2)	N/A	Read Only Calculated = Price Per Plot x Plots Selected
Comments	Text (512)	No	
Seller(s)			
Sellers Panel (NL)	Panel	N/A	
Sellers	Grid	N/A	All columns are Read Only Displays owner(s) of selected plots in Plots grid. Blank if no plots are selected
• First	Text (30)	N/A	
• Middle	Text (30)	N/A	
• Last	Text (30)	N/A	
• Suffix	Text (4)	N/A	
• City	Text (25)	N/A	
• State	Text (2)	N/A	

Purchaser(s)			Hidden for Buy Back
Purchaser(s)	Grid		
• Primary Owner	Radio Button	N/A	
• Purchaser	Drop Down^	Yes*	
• City	Text (25)	N/A	Read Only
• State	Text (2)	N/A	Read Only
• Add New	Button	N/A	Only shown in Add row
• X	Button	N/A	Removes row from grid
Plot(s)	Group Box	N/A	
(NL)	Label	N/A	
Cemetery	Drop Down (40)	Yes	
Reset Grid Filters	Button	N/A	Resets all grid column filters and clears any Plot selections
Plots (NL)	Grid	Yes*	All columns in the grid are read only (except the Checkbox column) * At least one Plot
• Deed Number	Text (15)	N/A	Read Only
• Purchase Date	Text (10)	N/A	Read Only
• Structure Type Name …	Text (24)	N/A	Read Only
• Grave	Text (24)	N/A	Read Only

HOW TO TRANSFER PLOT OWNERSHIP

Step 1: Enter the **Deed Number.**

Step 2: Enter **Date**.

Step 3: Enter **Price per Plot**.

Step 4: Enter **Comments** if any.

Sellers Tab Section

Step 1: Select **Cemetery.**

Step 2: Select **Plot(s)**. Multiple plots can be selected if they have the same owner(s).

Step 3: Review **Seller(s)** information which populates after selecting the plot(s).

Purchaser Tab Section

Step 1: Select a **Primary Owner.** Click the up arrow to place owner in the grid. If the owner does not already exist in the system, click the Add New field to open the Add Owner form. Select any additional **Owners**, if applicable.

Step 2: Click **Save.**

Step 3: A message will appear. **"Print a deed for the selected plots?"** If yes, the Print Deed form will display. See the How to Print a Deed instructions under the Deeds and Transactions section of this manual.

MAINTENANCE

The Maintenance section of the UAN Cemetery Manual contains a part for each area located on the Maintenance menu of the UAN Cemetery Software.

The sections in this part of the manual are:

- **Burial Details**

- **Cemetery Design**

- **Plot Details**

- **Plot Editor**

- **Structures**

- **« System**

  o **Backups**

  o **Change Password**

  o **Entity Setup**

  o **Reindex Database**

  o **Users Preferences**

  o **Users**

- **Wars**

BURIAL DETAILS

OVERVIEW

Burial Details allows the user to define categories of information about burials that are not pre-programmed into the system. The purpose is to define custom categories of data necessary for the efficient operation of the user's cemetery. Burial Details may be defined here, and then the values (details) assigned on a per burial basis. Every active Burial Detail is available to be assigned to any burial, but a burial is not required to use any Burial Details.

DELETE

A Burial Detail cannot be deleted unless there are no burials using the category. A Burial Detail can be marked as inactive to prevent future use, but will not delete any values already assigned to existing burials.

STEPS TO ACCESS

Cemetery → Maintenance → Burial Details

DATA REQUIREMENTS

Field	Type	Required	Additional Notes
Burial Details			
Name	Text (40)	Yes	
Status (NL)	Radio Button (2)	N/A	
Created By	Text (20)	N/A	Read Only Only visible in edit and display modes
Created Date	Date	N/A	Read Only Only visible in edit and display modes
Modified By	Text (20)	N/A	Read Only Only visible in edit and display modes
Modified Date	Date	N/A	Read Only Only visible in edit and display modes

HOW TO ADD A BURIAL DETAIL

Step 1: Click on the **Add** button.

Step 2: Enter **Name** of Burial Detail (Required).

Step 3: Select **Status**.

Step 4: Select **Save** and then **Close**.

CEMETERY DESIGN

OVERVIEW

This is where a new cemetery can be designed and new plots can be added to an existing cemetery using the Add functionality. Note that after a cemetery has been designed, the structures used (i.e. sections, lots, etc) and their hierarchy cannot be changed. This is also an area where the user can add geographic locations using WGS84 latitude and longitude information, photos, plot details and other additional fields using the edit functionality.

DELETE

A plot that has never been purchased or was purchased and then bought back by the cemetery can be deleted. A plot with an owner or burial cannot be deleted.

STEPS TO ACCESS

Cemetery → Maintenance → Cemetery Design

DATA REQUIREMENTS

Field	Type	Required	Additional Information
Plot	Text	N/A	Read Only
Location			
Latitude	Numeric (10,8)	No	Must be between -90 and 90
Longitude	Numeric (11,8)	No	Must be between -180 and 180
Photo 1			
Photo 1 (NL)	Image	N/A	Displays saved Photo 1 (if any) for plot. Scales image to fit into available space. Clicking image (if any) opens photo popup.
Add / Change	Button	N/A	Opens file browser to choose an image file for Photo 1
Delete	Button	N/A	Deletes Photo 1 if one exists
Photo 2			
Photo 2 (NL)	Image	N/A	Displays saved Photo 2 (if any) for plot. Scales image to fit into available space. Clicking image (if any) opens photo popup.

Add / Change	Button	N/A	Opens file browser to choose an image file for Photo 2
Delete	Button	N/A	Deletes Photo 2 if one exists
Plot Details			
Show	Radio Button (2)	N/A	
Plot Details			
• Name	Text (40)	N/A	Read Only
• Value	Text (512)	No	
Additional Files			
Add	Button	N/A	
Additional Files			
(NL)	Label	N/A	Single click a row to preview. Double click to open the file. Click and press Delete key to delete the file.
• File Name		N/A	Filename of imported file
• Size		N/A	File size in KB (in format ###,### KB)
• Date Modified		N/A	Modified date of the file
Preview (NL)	Image	N/A	Shows a preview of any clicked-on file row
Created By	Text (20)	N/A	Read Only Only visible in edit and display
Created Date	Date	N/A	Read Only Only visible in edit and display
Modified By	Text (20)	N/A	Read Only Only visible in edit and display modes
Modified Date	Date	N/A	Read Only Only visible in edit and display modes

HOW TO ADD A PLOT

Step 1:   Select the **Add Plots** button.

Cemetery Design Wizard

Step 1:   Click the **Next** button.

Step 2:   Select a **Cemetery** (Required). Click the **Next** button.

Step 3:   Select the next **Structure** that you want to add to the selected cemetery. A selection may be required for existing cemeteries containing each structure**.** Note that after a cemetery has been designed, the structures used (i.e. sections, lots, etc) and their hierarchy cannot be changed. Continue selecting Structures and clicking next until you have finished adding all the necessary structures.

Step 4:   Select the desired **Graves.**

Step 5:   Review the **New Cemetery Plots.** (You can select the **< Back** button if any revisions are necessary at this time.)

Step 6:   Click the **Finish** button.

HOW TO EDIT A PLOT

Step 1:   Select a **Plot**.

Step 2:   Click the **Edit** button.

Location

Step 1:   Enter optional **Latitude** in WGS84 Decimal Degrees format (+ or - 90).

Step 2:   Enter optional **Longitude** in WGS84 Decimal Degrees format (+ or - 180).

Photo 1 and Photo 2

Step 1:   Select or revise the photo by selecting the **Add/Change** Button.

Step 2:   Browse to the desired file using Windows Explorer. Double click on the file.

Plot Details Section

Step 1: Add or Edit the values of Plot Details established on the Plot Details screen.

Additional Files

Step 1: Click the **Add** Button.

Step 2: Browse to the desired file using Windows Explorer. Double click on the file.

PLOT DETAILS

OVERVIEW

Plot Details allows the user to define categories of information about plots that are not pre-programmed into the system. The purpose is to define custom categories of data necessary for the efficient operation of the user's cemetery. Plot Details may be defined here, and then the values (details) assigned on a per plot basis. Every active Plot Detail is available to be assigned to any plot, but a plot is not required to use any Plot Details.

DELETE

A Plot Detail cannot be deleted unless there are no plots using the category. A Plot Detail can be marked as inactive to prevent future use, but will not delete any values already assigned to existing plots.

STEPS TO ACCESS

Cemetery → Maintenance → Plot Details

DATA REQUIREMENTS

Field	Type	Required	Additional Information
Plot Additional Detail Categories			
Name	Text (40)	Yes	Name must be unique
Status (NL)	Radio Button (2)	N/A	
Created By	Text (20)	N/A	Read Only Only visible in edit and display modes
Created Date	Date	N/A	Read Only Only visible in edit and display modes
Modified By	Text (20)	N/A	Read Only Only visible in edit and display modes
Modified Date	Date	N/A	Read Only Only visible in edit and display modes

HOW TO ADD PLOT DETAILS

Step 1:   Click the **Add** button.

Step 2:   Enter **Name** of Plot Detail (Required).

Step 3: Select **Status**.

Step 4: Click **Save** and then **Close**.

PLOTS EDITOR

OVERVIEW

The Plots Editor allows the user to quickly change Plot Details or Locations (Latitude/Longitude) for multiple plots.

Plot Details can be edited either in groups or individually. When editing in groups, a Plot Detail must be selected, a value must be entered for the selected category, and plots must be selected for which to apply the value. When editing individually, a Plot Details category must be selected, and values may be entered individually for the desired plots.

Locations (Latitude/Longitude) may only be edited individually for the desired plots.

Users with the Transactions/Reports or Read-Only roles can access the Plots Editor in a display mode. They will be able to select Plot Details (and the detail name) or Location and can sort or filter the grid, but they will be unable to make any changes. Users with the Administrator role have full access to the functionality of the Plots Editor.

STEPS TO ACCESS

Cemetery → Maintenance → Plots Editor

DATA REQUIREMENTS

Field	Type	Required	Additional Information
Edit			
Edit	Radio Button (2)	N/A	
Plot Details (NL)	Drop Down (40)	Yes*	*Required when Edit is "Plot Details" Read only and blank when Edit is "Locations"
By			
By	Radio Button (2)	N/A	• Group (Default) • Individual Read only and "Individual" if Edit is "Locations" Resets to "Group" if Edit selection changes to "Plot Details"

Set Values To: *(If By is "Group")* Plots: *(If By is "Individual")*	Memo (512)	No	Field visible only when Edit By is "Group" When Edit By is "Group" this value will be saved for the selected Plots (or removed from the selected Plots if the value is blank) This box is Read Only for users with the Transactions/Reports or Read-Only roles
Reset Grid Filters	Button	No	
Plots			
• (Checkbox)	Checkbox	Yes*	**By is "Group"** Visible *At least one **By is "Individual"** Hidden This column is hidden for users with the Transactions/Reports or Read-Only roles
• Cemetery	Text (40)	N/A	Read Only
• Structure Type Name …	Text (40)	N/A	Read Only
• Grave	Text (40)	N/A	Read Only
• Value	Memo (512)	N/A	Read Only
• New Value	Memo (512)	Yes*	**By is "Group"** Read Only and hidden **By is "Individual"** Editable and visible *At least one New Value must be changed This column is hidden for users with the Transactions/Reports or Read-Only roles
Plots *(Locations)*	Grid	Yes*	Read Only Lists all Plots
• (Checkbox)	Checkbox	No	Read only
• Cemetery	Text (40)	N/A	Read Only
• Structure Type Name …	Text (40)	N/A	Read Only

• Grave	Text (40)	N/A	Read Only
• Lat	Numeric (10,8)	N/A	Read Only
• Long	Numeric (11,8)	N/A	Read Only
• New Lat	Numeric (10,8)	Yes*	*At least one New Lat must be changed Must be between -90 and 90
• New Long	Numeric (11,8)	Yes*	*At least one New Long must be changed Must be between -180 and 180

HOW TO EDIT PLOT DETAILS

Step 1:   Select a **Plot Detail.**

Step 2:   Select if the Plot Detail will be applied to a **group** of selections or an **individual** selection.

Step 3:   If you selected by group in step 2, enter a value in the **Set Values To** field.

Step 4:   If you selected by group in step 2, place a checkmark by the plots where you want to apply the value. If you selected by individual in step 2, enter a value in the value column of the grid.

Step 5:   Click **Save** and then **Close**.

HOW TO EDIT LOCATIONS

Step 1:   Select **Locations.**

Step 2:   Enter a latitude or longitude in the WGS84 Decimal Degrees format in the **New Lat** and **New Long** fields for each plot desired.

Step 3:   Click **Save** and then **Close**.

<div style="border:1px solid #000;">

STRUCTURES

</div>

OVERVIEW

Structures control how cemeteries are organized. The organization is made up of Structure Types and Structures. Examples of structure types include cemetery, section, lot, and grave. A cemetery includes a hierarchy to define the order of how the structures are organized (i.e. a Cemetery may have Sections, Sections may have Lots, and Lots have Graves). The Cemetery and Grave structure types are required and cannot be removed.

Users can activate additional structure types and place them in the hierarchy if desired. When organizing a cemetery, Cemetery will always be the first item in the hierarchy and Grave will always be the last item in the hierarchy. All other types are optional for the organization of a new cemetery. Note that after a cemetery has been designed, the structures used (i.e. sections, lots, etc) and their hierarchy cannot be changed.

The Structures area works unlike any other area of the software. For each structure type, you may have multiple (named) structures of the given type (e.g. Sections with names 1, 2, 3, 4, etc. and Graves with names A, B, C, etc.). In order to add, edit, or delete structures of a particular type (e.g. grave A), you must first select the structure type (e.g. Grave) and click the Edit button to access the list of available structures (e.g. graves). Structures of type Cemetery have additional details for the cemetery location (address).

DELETE

Structure types cannot be deleted. Any structure type that is not required can be deactivated. Cemetery and grave are the only required structure types and cannot be deactivated. Named structures of a structure type can be deleted, but only named structures that are not associated with any plots in an existing cemetery can be deleted.

STEPS TO ACCESS

Cemetery → Maintenance → Structures

DATA REQUIREMENTS

Field	Type	Required	Additional Information
Structure Type	Group Box		
Name	Text (20)	Yes	Must be unique
Status (NL)	Radio Button (2)	N/A	

Structures			
Show	Radio Button (3)	N/A	
Structures (NL)	Grid	No	
• Name	Text(40) (a) or Text(24) (b)	Yes	Must be unique for the Structure Type (a) 40 characters for Cemetery (b) 24 characters for all other Structure Types
• Active	Checkbox	N/A	Default status: checked
• Details	Button	N/A	Only visible when Structure Type is Cemetery
• Delete	Icon	N/A	
Created By	Text (20)	N/A	Read Only Only visible in edit and display modes
Created Date	Date	N/A	Read Only Only visible in edit and display modes
Modified By	Text (20)	N/A	Read Only Only visible in edit and display modes
Modified Date	Date	N/A	Read Only Only visible in edit and display modes

HOW TO EDIT STRUCTURE TYPES AND ADD NEW STRUCTURES

There are 2 System-defined Structure Types that cannot be revised: Cemetery and Grave.

Step 1: Select a **Structure Type** and click on the **Edit** button.

Step 2: Edit the **Name** of the Structure Type, if desired.

Step 3: Add, Edit, or Delete the **Structures** in the list grid or Add row, if desired. Cemetery structures have an additional […] button in the grid or Add row that, when clicked, opens a form for the location (address) of the cemetery.

Step 4: Select **Save** and then **Close**.

BACKUPS

OVERVIEW

The backup copy is used to restore previously backed up information to the computer in the event the information on the computer is lost or cannot be used. If a backup is made and stored in a safe location off site, the local government's data can be quickly and easily restored to another computer.

Backups may be optionally enforced by a user with the Administrator role by selecting the option to enforce a backup schedule in Entity Setup. If the backup enforcement schedule has been selected, backups of the Cemetery database must be made at least every 30 days. If desired, a shorter backup interval may be specified in Entity Setup. Entities that will manage their own server backup process can disable the UAN backup timer in Entity Setup.

A user with either the Administrator or Transactions/Reports role may initiate a backup at any time regardless of the backup schedule. Users with the Read-Only role cannot initiate a backup or restore. Completing a Cemetery backup successfully will reset the backup timer. If backups are enforced and the interval has passed, a message for the required backup will be displayed when a menu item is selected. Selecting OK will open the backup screen to initiate a backup. The backup can be postponed one day by selecting Cancel when the message for the required backup is displayed. The backup may continue to be postponed by selecting Cancel when the message is displayed again the next day.

Backups may be saved to any location other than the hard drive on which the SQL server resides. The backup defaults and save location can be different for each user who makes a backup, and the backup defaults and save location that were previously saved for a user will be automatically loaded into the backup screen the next time that user initiates a backup. Any save location will be specific for the computer that is initiating the backup and may need to be changed when initiating a backup from a different computer..

For entities that will manage their own server backup process, the UAN backup timer can be disabled in Entity Setup by a user with the Administrator role.

STEPS TO ACCESS

Maintenance → « System - Backups

Field	Type	Required	Comment
Backup File	Group Box	N/A	

Name	Text (50)	Yes	Not Saved
Database Settings	Group Box	N/A	
Use default user credentials	Check Box	N/A	This Check Box will be checked when the current user has not previously made a backup.
Only uncheck this if instructed by UAN!	Label	N/A	
Server Name	Text (50)	N/A	Read Only Not Saved Path to the SQL database (usually (local)\SQLEXPRESS)
Database	Text (50)	N/A	Read Only Not Saved UANCemetery
User Name	Text (50)	Yes*	**If "Use default user credentials" is checked:** Read Only UANCemetery (default User Name) **If "Use default user credentials" is unchecked:** Editable and Required
Password	Text (50)	Yes*	**If "Use default user credentials" is checked:** Read Only Default password for Cemetery **If "Use default user credentials" is unchecked:** Editable and Required Display password as asterisks (*)
Backup Destination	Group Box	N/A	
Backup Destination (NL)	Radio Button (3)	N/A	• CD or DVD (Value = CDRom) • Flash or USB Drive (Value = USB) • Network Drive or Other (Default: Value = Other)

			"CDRom", "USB", or "Other"
CDorDVD (NL)	Text (200)	Yes*	Always Read Only **If Backup Destination is CDRom:** Required Click Browse button to select the path **If Backup Destination is not CDRom:** Blank
Browse (CDorDVD)	Button	N/A	**If Backup Destination is CDRom:** Enabled Button click will open a form to select the path for CDorDVD **If Backup Destination is not CDRom:** Disabled
USB (NL)	Text (200)	Yes*	Always Read Only **If Backup Destination is USB:** Required Click Browse button to select the path **If Backup Destination is not USB:** Blank
Browse (USB)	Button	N/A	**If Backup Destination is USB:** Enabled Button click will open a form to select the path for USB **If Backup Destination is not USB:** Disabled
Other (NL)	Text (200)	Yes*	Always Read Only **If Backup Destination is Other:** Required Click Browse button to select the path **If Backup Destination is not Other:** Blank
Browse (Other)	Button	N/A	**If Backup Destination is Other:** Enabled Button click will open a form to select the path for Other

			If Backup Destination is not Other: Disabled

HOW TO PERFORM A BACKUP

Step 1:   Name the backup File. The default name of the Backup File will be 'UAN Cemetery Backup' with the software's current version, processing date and time. Changing the UAN Backup name is optional. If you elect to rename the default backup file, please use a distinguishable name so recent backup files can be identified.

Step 2:   Next select the destination of the UAN Cemetery Backup File. To designate a media storage devise, select the radio button to the left of corresponding icon. Select 'Browse' to choose the file path (location) where the Backup File will be saved to. The backup options and the unique characteristics of each are described below.

1. **CD or DVD**: This is the default option unless another backup option has been used in the past. The default folder to for backup storage will be 'UANBackups'. This folder will be automatically created if it isn't already present on the CD or DVD. To change the destination folder, click on 'Browse', then a 'DriveSelect' window will open. Double click on the CD or DVD drive letter to display the available folders on the disc. Select the folder that the backup should be saved to and click 'OK'.

2. **USB Drive:** USB drives can be small pocket sized flash drives, or the larger external drives that require a USB cable and power adaptor. The default folder to for backup storage will be 'UANBackups'. This folder will be automatically created if it isn't already present. Click on 'Browse' to open the 'DriveSelect' window that will display the available USB drives connected to your PC. Double click on the USB drive to display the available save to 'UAN Backups'. If there are no folders, the backup will be saved to the root of the drive. Select the folder that the backup should be saved to and click 'OK'.

3. **Network Drive or Other:** This option gives you the ability to store your backup on any drive that is accessible to your computer over a network or any non USB external hard drive. You will also be able to save to a local hard drive as long as the operating PC is not the database server. (i.e. If you are a single PC user, you cannot save backups to the local hard drive.) Click on 'Browse' and all available network drives will

display in the 'DriveSelect' window. (If a network drive is not available in this window, you may need to log back into the network or contact your IT Administrator.)

Recommendation: Develop and maintain a good rotation schedule for your backup media.

Step 3: 'SQL Server' area is used when the UAN Cemetery software is installed on a network server. If your UAN Cemetery software is not installed on a network server, leave the 'Use default user credential' check box checked and proceed to Step 4.

Recommendation: If the UAN Cemetery software resides on a SQL server, consult with your network administrator for proper policies and procedures before proceeding to Step 5.

Step 4: Select the **Start** button. As the backup progress, the status bar to the left of the Start button will populate. After the backup is complete, a message that the backup is complete will appear in the Status Window. Your UAN Cemetery Backup is now completed.

Reminder: The longer a system is used without making a backup, the greater the risk of data being lost should a problem occur.

CHANGE PASSWORD

OVERVIEW

User passwords must be changed at least every 3 months, and also after being reset by an administrator to "uan". Upon login, if the current date is on or after the user's password expiration date, the user will be presented with and forced to complete the Change Password screen before gaining access to any other area of the software.

None of a user's previous 4 passwords may be reused. Passwords must contain at least 8 characters, must not begin or end with a space, and must include characters from at least 2 of the following 4 categories:

1) Lowercase letters (abcdefghijklmnopqrstuvwxyz)
2) Uppercase letters (ABCDEFGHIJKLMNOPQRSTUVWXYZ)
3) Digits (0123456789)
4) Special characters (`~!@#$%^&*()_+-=[]\;',./{}|:"<>?)

STEPS TO ACCESS

Maintenance → « System - Change Password

DATA REQUIREMENTS

Field	Type	Required	Additional Information
User Name	Text (20)	No	• The system automatically pulls in the user name.
Current Password	Text (20)	Yes	• Enter the current password. It must match.
New Password	Text (20)	Yes	• Enter the new password.
Verify Password	Text (20)	Yes	• Enter the new password again. It must match what was entered in the prior field for the new password.

HOW TO CHANGE THE PASSWORD

Step 1: When the Change Password screen appears, the system will automatically pull in the User Name presently logged-in. Enter the **Current Password**.

Step 2: Enter the **New Password**.

Step 3: In the **Verify Password** field, re-enter the new password.

Step 4: Click on the **Save** button to change the password. *(Selecting **Close** on this step will exit without saving the new password.)*

Step 5: Click the **Close** button to exit the Change Password form after the new password has been saved. *(The system displays a message in the bottom left corner of the Change Password form to confirm the new password has been saved.)*

ENTITY SETUP

OVERVIEW

Entity Setup allows defaults to be set for various options used throughout the Cemetery software. Entity Setup settings apply to all users. Only users assigned to the Administrator role can access Entity Setup.

STEPS TO ACCESS

Cemetery → Maintenance → « System - Entity Setup

DATA REQUIREMENTS

Field	Type	Required	Comment
Entity Information	Tab		
Entity			
Entity Name	Text (30)	Yes*	Read Only unless user is the system user (ApplicationCache.UsersCurrentLogin.IsSystem = True) Display: UANEnitityNameDecrypted Saved: UANEnitityName *Entities* *UANEnitityName*
Entity Type	Text (8)	Yes*	Read Only unless user is the system user (ApplicationCache.UsersCurrentLogin.IsSystem = True) *Entities* *UANEntityType*
County	Text (10)	Yes*	Read Only unless user is the system user (ApplicationCache.UsersCurrentLogin.IsSystem = True) Display: UANEntityCountyDecrypted Saved: UANEntityCounty *Entities* *UANEntityCounty*

UAN Entity ID	Numeric	Yes*	Read Only unless user is the system user (ApplicationCache.UsersCurrentLogin.IsSystem = True) Display: UANEntityIDDecrypted Saved: UANEntityID *Entities* *UANEntityID*
Village Name Print (NL)	Radio Button (2)	N/A	• Print name as "Abc Village" (Value = 0) • Print name as "Village of Abc" (Value = 1) Visible only for Villages. *Entities* *UANVillageOf*
Plats Information			
Entity Full Name	Text (40)	Yes	During conversion, if the user either did not import a cemetery data file or the value from the cemetery data file is blank, default to the formatted entity name (without the county). *Entities* *CemeteryEntityName*
Plats Location	Text (40)	Yes	*Entities* *CemeteryPlatsLocation*
(NL)	Label	N/A	(on file in the office of the)
Officials	Tab		See Officials document for more information
Deed Format	Tab		
Header	Group Box		
Header Edit (NL)	Radio Button (2)	N/A	• Plots Sold (Default: Value = 10) • Text Below: (Value = 11) *Entities* *CodeIDDeedHeader*
Header (NL)	Memo (512)	Yes*	When the selection for Header Edit is: **Plots Sold**:

			Read only Do not remove existing text **Text Below**: Editable *Required *Entities* *DeedHeaderText*
Terms & Conditions	Group Box		
Terms & Conditions Edit (NL)	Radio Button (3)	N/A	• Plots Sold (Default: Value = 10) • Text Below: (Value = 11) • Omitted (Value = 12) *Entities* *CodeIDDeedTerms*
Terms & Conditions (NL)	Memo (2048)	Yes*	When the selection for Terms & Conditions Edit is: **Plots Sold**: Read only Do not remove existing text **Text Below**: Editable *Required **Omitted**: Read only Do not remove existing text *Entities* *DeedTermsText*
Other	Group Box		
Print Notary Block	Check Box	N/A	Default Checked *Entities* *HasDeedNotaryBlock*

Paper Size	Group Box		
(NL)	Radio Button (2)	N/A	• Legal (Default: Value = 13) • Letter (Value = 14) *Entities* *CodeIDDeedPaperSize*
Signature Lines	Group Box		
Left Side	Spin (1)	N/A	Values 1 through 7 only Default to 1 (v 2.0 install) *Entities* *DeedSignatureLinesLeft*
Right Side	Spin (1)	N/A	Values 2 through 8 only Default to number of active items in Officials grid (Officials tab) (v 2.0 install) *Entities* *DeedSignatureLinesRight*
Footer	Group Box		
Print Page Numbers	Checkbox	N/A	Defaults checked / True (version 2.0) *Entities* *IncludeDeedPageNumbers*
Owners	Tab		
Address Defaults (New Owners)			
City	Text (25)	No	*Entities* *DefaultOwnerCity*
State	Text (2)	No	*Entities* *DefaultOwnerState*
ZIP	Zip (5,4) or (3,3)	No	*Entities* *DefaultOwnerZipCode*

Residing Entity Defaults (New Owners)			
Name	Text (40)	No	*Entities* *DefaultResidingEntityName*
Type	Text (40)	No	*Entities* *DefaultResidingEntityType*
County	Text (40)	No	*Entities* *DefaultResidingCountyName*
State	Text (40)	No	*Entities* *DefaultResidingStateName*
Backups	Tab		
Backup Interval			
Enforce Backup	Checkbox	N/A	When unchecked, set Days to 30 and make read only Default checked *Entities* *IsBackupEnforced*
Days (NL)	Spin (2)	Yes	Must be between 1 and 30 inclusive Read Only when Enforce Backup is unchecked Default value is 30 *Entities* *BackupInterval*
(NL)	Label	N/A	This setting cannot exceed 30 days.
Created By	Text (20)	N/A	Read Only Display: UserName Saved: UserID *Entities.CreatedByUserID* *Users.UserName*
Created Date	Date	N/A	Read Only *Entities* *CreatedDateTime*
Modified By	Text (20)	N/A	Read Only

			Display: UserName Saved: UserID *Entities.UpdatedByUserID* *Users.UserName*
Modified Date	Date	N/A	Read Only *Entities* *UpdatedDateTime*

HOW TO EDIT ENTITY SETUP

Entity Information Tab

Step 1: Review **Entity Name, Entity Type, County** where Entity resides and **UAN Entity** ID are noted here. **This information cannot be revised by the Entity. If any of this information appears incorrect, please contact UAN Support.**

Step 2: **Entity Full Name** and **Plats Location** can be revised as necessary.

Officials Tab

To Add an Official:

Step 1: Select the **Add** button

Step 2: Enter full **Name** of Official

Step 3: Enter or select **Title**

Step 4: Select **Save** then **Close**.

Deed Format Tab

Note that these deed format options are defaults, and can be modified at the time of printing a deed.

Step 1: **Header** information to be printed on deed: Choice of **Plots Sold** or **Text** as entered in this section of the Entity Setup.

Step 2: **Terms and Conditions** to be printed on deed: Choice of **Plots Sold**, **Text** as entered in this section of the Entity Setup or **Omitted** from the Deed.

Step 3:   **Other**: A **Notary Block** can be printed on the deed if this selection has a checkbox.

Step 4:   **Paper Size:** Selection of **Letter** (8 ½" x 11") or **Legal** (8 ½" x 14") paper can be made with the radio button indicating choice.

Backup Tab

Step 1:   Checkmark **Enforce Backup** if backups should be enforced according to the interval setting below. **UAN suggests leaving this check marked.**

Step 2:   Verify or select the **UAN Backup Interval** setting. *(The setting is defaulted to **Require a UAN Backup every 30 days**.)*

Step 3:   Click **Save** then **Close**.

Owners Tab

Step 1:   **Address Defaults (New Owners):** City, State and Zip for Owner's address can be added and will default in when adding a new owner.

Step 2:   **Residing Entity Defaults (New Owners)** Name, Type, County and State for the Residing Entity can be added and will default in when adding a new owner.

Step 3:   Click **Save** then **Close**.

REINDEX DATABASE

OVERVIEW

UAN Support recommends clicking the **Reindex Database** menu option as a first step to resolving minor technical issues with the UAN Cemetery software. Clicking this menu item will open a message that says **Reindexing Database, please wait …** The message will close when it is complete".

The reindex database process generally takes a just few minutes and is also safe to do at any time as preventive maintenance to increase system responsiveness.

STEPS TO ACCESS

Maintenance → « **System - Reindex Database**

USER PREFERENCES

OVERVIEW

User Preferences allow each user to set defaults for various options used throughout the UAN software. For example, a user can specify the default paper size for most reports, if the main menu is maximized by default, etc. Unlike Entity Setup settings which apply to all users, the settings in user preferences only apply to the user who saves them.

STEPS TO ACCESS

Maintenance → « System – Users Preferences

DATA REQUIREMENTS

Field	Type	Required	Comment
System	Tab		
Main Window – Startup Size	Group Box		
(NL)	Radio Button (2)	N/A	• Maximize main window (Default) • Use 75% of display area
Expandable Forms – Popup Size	Group Box		
(NL)	Label	N/A	All forms with grids are expandable.
(NL)	Radio Button (2)	N/A	• Maximize all expandable forms • Use UAN defaults by form (Default)
Reports	Tab		
Standard Paper Size	Group Box		
	Radio Button (3)	N/A	• Use UAN defaults by report (Default) • Set all to Letter (8.5 x 11) • Set all to Legal (8.5 x 14)
(NL)	Label	N/A	These only set the paper defaults. Paper options will also be available to choose when printing each report. Deed defaults are set in Entity Setup > Deed Format.

Standard Paper Orientation	Group Box		
	Radio Button (3)	N/A	• Use UAN defaults by report (Default: Value = 0) • Set all to Portrait (Tall) • Set all to Landscape (Wide)
Display – Report Viewer Size	Group Box		
	Radio Button (2)	N/A	• Maximize report viewer • Use 75% of display area (Default)
Modified By	Text (20)	N/A	Read Only
Modified Date	Date	N/A	Read Only

HOW TO EDIT USER PREFERENCES

System Tab

Step 1: Verify or select the **Main Window – Startup Size**. *(The setting is defaulted to Maximize Main Window.)*

Step 2: Verify or select the **Expandable Forms – Popup Size**. *(The setting is defaulted to Use UAN defaults by form.)*

Reports Tab

Step 1: Verify or change the **Standard Paper Size** setting. *(The setting is defaulted to Use UAN defaults by report.)*

Step 2: Verify or change the **Standard Paper Orientation**. *(The setting is defaulted to Use UAN defaults by report.)*

Step 3: Verify or change the **Display – Report Viewer Size**. *(The setting is defaulted to Use 75% of display area.)*

Step 4: Click **Save** then **Close**.

USERS

OVERVIEW

A User is a person who has been granted access to the Cemetery system. Only the administrator can add or maintain users.

A user must be assigned to a role to specify the user's access to available screens and functions and if the user has read only access or the ability to enter transactions.

The Administrator role is assigned to the first user added to the system, and at least one Administrator user must be active at all times. A user assigned to the Administrator role may only be deleted, deactivated, or assigned to another role if at least one other active user is also currently assigned to the Administrator role.

STEPS TO ACCESS

Maintenance → « System - Users

DATA REQUIREMENTS

Field	Type	Required	History	Comment
User				
User Name	Text (20)	Yes	No	Read Only in Edit mode. Unique
Role	Drop Down (Single) (20)	Yes	Yes	^Roles Drop Down
Status	Radio Button (2)	N/A	Yes	• Active (Default: Value = 1) • Inactive (Value = 0) Cannot mark the only active administrator inactive.
Created By	Text (20)	N/A		Read Only Only visible in edit and display modes
Created Date	Date	N/A		Read Only Only visible in edit and display modes
Modified By	Text (20)	N/A		Read Only Only visible in edit and display modes
Modified Date	Date	N/A		Read Only Only visible in edit and display modes

HOW TO ADD A USER

Step 1:   Click the **Add** button.

Step 2:   Enter the **User Name**.

Step 3:   Select the **Role** for the user to be added.

Step 4:   Verify the **Active** radio button is selected. *(The system automatically defaults the radio button to **Active**).*

Step 5:   Click **Save** then **Close**.

Step 6:   The system will display a message stating that a new user has been added and will display the **User Name** and **Password**. The password will expire upon the first login. Click on the **OK** button.

Step 7:   Click on the **Close** button to exit the Add User form.

WARS

OVERVIEW

A war is an armed conflict that military veterans may have participated in. The following are the system defined wars:

- French and Indian War
- American Revolution
- War of 1812
- Mexican-American War
- Civil War
- Spanish-American War
- World War I
- World War II
- Korean War
- Vietnam War
- Persian Gulf, Desert Storm
- War in Afghanistan
- Operation Iraqi Freedom

The system wars established by UAN are permanent and cannot be deleted, but may be edited (status only), activated, deactivated, or displayed. Additional wars may be added for future conflicts not in the permanent list.

STEPS TO ACCESS

Cemetery → Maintenance → Wars

DATA REQUIREMENTS

Field	Type	Required	Comment
War			
Name	Text (40)	Yes	Must be unique
Status (NL)	Radio Button (2)	N/A	
Created By	Text (20)	N/A	Read Only Only visible in edit and display modes
Created Date	Date	N/A	Read Only Only visible in edit and display modes

Modified By	Text (20)	N/A	Read Only Only visible in edit and display modes
Modified Date	Date	N/A	Read Only Only visible in edit and display modes

HOW TO ADD A WAR

Step 1:   Click the **Add** button.

Step 2:   Enter **Name** of War (Required).

Step 3:   Select **Status**.

Step 4:   Click **Save** and then **Close**.

REPORTS & STATEMENTS

The Reports & Statements section of the UAN Cemetery Manual contains a part for each area located on the Reports & Statements menu of the UAN Cemetery Software.

The sections in this part of the manual are:

- **Bequest Reports**

- **Burial Details Report**

- **Cemetery Summary Report**

- **Grave Reports**

- **Plot Details Report**

- **Sales and Fees Reports**

- **Transaction Log Report**

- **Veteran Reports**

On each of the report screens, there are several different selections available to modify how a report will be displayed or printed. The system has each selection defaulted to a standard option, but some of the selections can be changed depending on the report. There is a **date** selection area which enables a report to be limited by the date of death, birth, burial, bequest and/or Sale/Transfer. The **paper** size (letter or legal) and orientation (portrait or landscape) can also be modified. Some reports may have the selection to **search** what data is pulled into the report. There is also a **sorting** selection which enables data on the report to be sorted by certain criteria.

Note that where "Locations as indicated by Structure listing" is indicated, the grave location is depicted using the Structure tree (Cemetery, Section, Plot, Grave, etc).

At the bottom of each report screen there are also button selections to choose whether the report is printed, displayed, saved to a PDF file, exported to a Microsoft Excel file or closed. The buttons are defined below:

Print – Options to select the number of copies, orientation (portrait or landscape), paper size and paper type will all be available by clicking the Properties button of the Print box.

Display – The selected information will be displayed on the screen for review.

Save PDF – When this button is selected for a report, the system will display the Save As box to save the report as a PDF file in the _UAN_EFiles folder. The system automatically defaults a file name for the report to be saved as, but the file name can be changed.

Export – This button is only enable for reports with Export in the name. The system will display the Save As box to save the report as a Microsoft Excel file in the _UAN_EFiles folder. The system automatically defaults a file name for the report to be saved as, but the file name can be changed.

Close – The system closes the report screen. The report screen can also be closed by clicking on the 'x' located on the tab (top left of report screen) beside the name of the report.

BEQUEST REPORTS

BEQUESTS

The **Bequests** report provides information about bequests – monies left in trust with the entity to manage a request such as flowers placed on a grave on a birthday or anniversary. It includes the Cemetery name, Grave Location as indicated through a structure listing, Occupant of the Grave, the amount left, the Date the bequest was made, if the Bequest is Paid in full or not, and Details listing the activity the bequest supports. The report can be sorted by Plot or Occupant.

BEQUEST RECEIVABLES REPORT

The **Bequests Receivable** report provides information about bequests – monies left in trust with the entity to manage a request such as flowers placed on a grave on a birthday or anniversary – that have not been paid in full (the Receivable portion). The report includes the Cemetery name, Grave Location as indicated through a structure listing, Occupant of the Grave, the remaining amount of the Bequest yet to be paid, the Date the bequest was made, and Details listing the activity the bequest supports. The report can be sorted by Plot or Occupant.

BEQUEST EXPORT

The **Bequest Export** option enables bequest information to be saved as a Microsoft Excel file. After the transactions to be included are selected, click on the Export button. The system will display the Save As box to save the report as a Microsoft Excel file in the _UAN_EFiles folder. The system automatically defaults a file name for the report to be saved as, but the file name can be changed.

BURIAL DETAILS REPORT

BURIAL DETAILS LISTING

The **Burial Details Listing** report provides information on user defined categories of information about burials that are not preprogrammed into the system. It includes the Cemetery name, Burial Detail name, section, lot, grave, occupant, and the Burial Detail value.

CEMETERY SUMMARY REPORT

The **Cemetery Summary** report provides a current sales summary of the cemetery. It shows: 1) The number of graves available and purchased and of those purchased which are occupied and unoccupied; 2) Summary breakdowns of Sales and Fees showing both Received amounts and amounts still Receivable.

GRAVE REPORTS

GRAVES LISTING

The **Graves Listing** report provides information about all graves. It includes the Cemetery name, Grave Location as indicated through a structure listing and the Owner of the grave, Occupant of the grave (if any), and the Location of the Grave in Longitude and Latitude format.

GRAVES AVAILABLE

The **Graves Available** report provides information about all plots that are currently Available. It includes the Cemetery name, Grave Location as indicated through a structure listing and the Location of the Grave in Longitude and Latitude format.

GRAVES PURCHASED

The **Graves Purchased** report provides information about all plots that have been purchased. It includes the Cemetery name, Grave Location as indicated through a structure listing, the Owner of the grave, and the Occupant of the grave (if any).

GRAVES RESERVED

The **Graves Reserved** report provides information about all plots that are currently Reserved (owned but empty). It includes the Cemetery name, Grave Location as indicated through a structure listing and the Owner of the grave.

GRAVES OCCUPIED SUMMARY

The **Graves Occupied Summary** report provides information about all plots that are currently Occupied. It includes the Cemetery name, Grave Location as indicated through a structure listing and the Occupant of the grave.

GRAVES OCCUPIED DETAIL

The **Graves Occupied Detail** report provides detailed information about all plots that are currently Occupied. It includes the Cemetery name, Grave Location as indicated through a structure listing and detailed Occupant information including: Occupant of the grave, Age at time of death, Birthdate, date of Death, Burial date, Sex of the Occupant, indication if the Occupant was a resident of the entity and Permit Number.

GRAVES OCCUPIED ADDITIONAL DETAIL

The **Graves Occupied Additional Detail** report provides extensive detailed information about all plots that are currently Occupied. It includes detailed location including the Cemetery name, Grave Location as indicated through a structure listing, Grave Status, Geophysical Location, Burial Details and Comments. The detailed Occupant information including: Occupant of the grave, Cause of Death, Place of Death Age at time of death, Birthdate, date of Death, Burial date, Sex of the Occupant, indication if the Occupant was a resident of the entity and Permit Number.

GRAVES EXPORT

The **Graves Export** option enables Graves information to be saved as a Microsoft Excel file. After the Transactions to be included are selected, click on the Export button. The system will display the Save As box to save the report as a Microsoft Excel file in the _UAN_EFiles folder. The system automatically defaults a file name for the report to be saved as, but the file name can be changed.

PLOT DETAILS REPORT

PLOT DETAILS LISTING

The **Plot Details Listing** report provides information on user defined categories of information about plots that are not preprogrammed into the system. It includes the Cemetery name, Plot Detail name, section, lot, grave, owner, and the Plot Detail value.

SALES AND FEES REPORTS

SALES

The **Sales** report provides information about all plots that have been sold. It includes the Cemetery name, Grave Location as indicated through a structure listing, the Owner of the grave, Date of purchase transaction, Amount of Sale Received and Amount Receivable.

FEES

The **Fees** report provides information about all plots that are currently Reserved and have any fee amounts. It includes the Cemetery name, Grave Location as indicated through a structure listing, the Owner of the grave, date of purchase transaction, Amount of Fees Received and Amount of Fees Receivable.

RECEIVABLES

The **Receivables** report provides information about all graves that still have open Receivables. It includes the Cemetery name, Grave Location as indicated through a structure listing, the Owner of the grave, date of purchase transaction, Amount of Sales Receivable and Amount of Fees Receivable.

SALES AND FEES EXPORT

The **Sales and Fees Export** option enables Sale and Fees information to be saved as a Microsoft Excel file. After the Transactions to be included are selected, click on the Export button. The system will display the Save As box to save the report as a Microsoft Excel file in the _UAN_EFiles folder. The system automatically defaults a file name for the report to be saved as, but the file name can be changed.

TRANSACTION LOG REPORT

TRANSACTION LOG

The **Transaction Log** report lists all of the detailed information for transactions processed through the system during the specified reporting period. The detailed information shown on the report varies depending on the type of transaction.

TRANSACTION LOG EXPORT

The **Transaction Log Export** option enables Transaction Log information to be saved as a Microsoft Excel file. After the Transactions to be included are selected, click on the Export button. The system will display the Save As box to save the report as a Microsoft Excel file in the UAN_EFiles folder. The system automatically defaults a file name for the report to be saved as, but the file name can be changed.

VETERAN REPORTS

ALL VETERANS

The **All Veterans** report provides information about all plot occupants who were marked as Veterans. It includes the Cemetery name, Grave Location as indicated through a structure listing, Occupant of the Grave, the age at time of death, and the War, if any participation. The report can be sorted by Plot or Occupant.

WAR VETERANS

The **War Veterans** report provides information about all plot occupants who were indicated as Veteran participants of Wars. It includes the Cemetery name, Grave Location as indicated through a structure listing, Occupant of the Grave, the age at time of death, and the War, if any participation. The report can be sorted by Plot or Occupant.

VETERAN EXPORT

The **Veteran Export** option enables Veterans information to be saved as a Microsoft Excel file. After the Transactions to be included are selected, click on the Export button. The system will display the Save As box to save the report as a Microsoft Excel file in the _UAN_EFiles folder. The system automatically defaults a file name for the report to be saved as, but the file name can be changed.