

Cemetery Manual

UAN
UNIFORM
ACCOUNTING
NETWORK

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Uniform Accounting Network – Cemetery Manual

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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

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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**
 - **Buy Back**
 - **Deeds & Transactions**
 - **Sell**
 - **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.

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.

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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.

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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:** If 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

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Graves Occupied Detail

Graves Occupied Additional Detail

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

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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

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

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

Step 1a: Enter **Extension** 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

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BUY BACK

OVERVIEW

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

STEPS TO ACCESS

Cemetery → Transactions → « Plot Transactions – Buy Back

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**.

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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

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:

- **Deed Number.**
- **Date.**
- If Plot was **Paid** for. (Yes or No).
- **Price per Plot.**
- **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.

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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.

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SELL

OVERVIEW

Plots can be sold to one or more owners.

STEPS TO ACCESS

Cemetery → Transactions → « Plot Transactions – Sell

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.

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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

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**
 - **Backups**
 - **Change Password**
 - **Entity Setup**
 - **Reindex Database**
 - **Users Preferences**
 - **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.

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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

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

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.

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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.

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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

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

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**.

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- 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**.

STRUCTURES

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

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.

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- 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**.

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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

HOW TO PERFORM A BACKUP

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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.*

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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.*

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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

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.)*

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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

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.

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- 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

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**.

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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

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.

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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

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.

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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.

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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).

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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.

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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.

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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.