

## Conference Administrator Guide

ServWare allows you to customize the system to support your conference needs. For example, you can:

- Create user accounts for your conference members and assign permissions to each account based upon the conference member’s role in your organization.
- Customize ServWare with your local utilities, referral agencies, and income and expense types.

All you need to run ServWare is a computer or tablet that is connected to the Internet. Simply open a browser window, such as Microsoft® Internet Explorer®, Google Chrome™, or Mozilla® Firefox® and enter www.ServWare.org in your browser’s address bar.

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## Conference Member Setup

As the administrator for your conference, you are responsible for several setup tasks that will enable your conference members to easily complete client and assistance request information. You can create user accounts for your conference members and assign the appropriate role to each user. The available options are:

- **User.** This role should be assigned to conference members who need to view or add information into ServWare, such as call takers and home visitors. Conference members who are assigned the **User** role will not have access to ServWare administrative tasks.
- **Conference Admin.** Users assigned the **Conference Admin** role can perform both administrator and user tasks. Typically a conference would only assign one or a limited number of conference administrators.

### Create Conference Member User Accounts

1. From the **Admin** menu, select **Conference Members**.
2. Click **New Conference Member**.
3. Enter the conference member information; fields with an asterisk are required.
4. If your conference will be tracking miles and hours in service, you can set **Default Miles** or **Default Hours** for a particular conference member if you would like these default values to automatically populate for the member when they create a new miles/hours in service entry in ServWare.
5. The following options can be selected for a member:
  - If the member you are creating wishes to be a **Conference Contact**, which means that they will receive communications from the ServWare team periodically about new releases, etc., then select the **Conference Contact** check box.
  - If your conference is set up as part of a district that can assign clients to conferences within the district, then you can select the **Referral Contact** check box for the member if the member wants to be notified of requests assigned to the conference by the district.
6. To send an email to the member with their account details, select the **Email Member Account Information** checkbox.
7. To display the member's name in selection lists throughout ServWare (such as home visitor, request assigned, etc.), then select the **Display in ServWare Selection Lists** option.

**NOTE:** If the individual is assigned to a request and then later removed from the selection lists, they will not be shown when the request is accessed in the future.

8. If you have defined member roles, they are available for selection from the **Primary Role** and **Secondary Role** lists. For more information about adding member roles, see [Define Landlord/Housing](#) Information. Landlord/housing provider information can be defined and then selected for rent/housing assistance requests. Conference users will be able to select the landlord/housing information that is defined when adding rent assistance requests.

To add landlord/housing information, from the **Admin** menu, select **Landlords/Housing**, and then click **New Housing Entry**. Enter the appropriate information for the housing provider. You can indicate if a 1099 will be required for the housing provider, and indicate if your conference has a copy of the housing provider's W9 (including the date you received it).

Conference members can also view this information from the **View > Landlords/Housing** page.

9. Define Member Roles.

10. When creating the **User Name** and **Password**, keep the following in mind:

- For the user name, use a common naming method, such as first initial + last name, that will be easy for conference members to remember.
- Password must contain between 8 and 20 characters, must contain one numeric character, one lower-case letter and one upper-case letter. Members can change their password later, if needed.

**NOTE:** When the conference user logs into ServWare for the first time, using the password that you created and provided to them, they will be prompted to change their password for security purposes.

11. Assign the appropriate role for each member.

- Most members should be assigned the **ServWare User** role.
- Administrators should be assigned the **Conference Administrator** role.
- Members who need to view information only, with no permission to add or edit information, should be assigned the **ServWare Readonly User** role.

12. Click **Save**.

## Delete Conference Member User Accounts

1. From the **Admin** menu, select **Conference Members**.
2. After located the conference member that you want to delete, click **Delete**. Confirm that you want to delete the selected conference member.

If the conference member that you are trying to remove is assigned to a request in the system, you will not be able to delete the member. In this case, you can choose to make the member **Inactive** instead.

## Client Import

ServWare administrators can import your clients into your conference from a Microsoft® Excel® file. There are specific requirements for the client import Excel file as follows:

- The columns must be in the following order (three columns are required):
  1. First Name (required)
  2. Last Name (required)
  3. Street Address Line 1 (required)
  4. Street Address Line 2
  5. City
  6. State Code (two letter abbreviation)
  7. Zip Code
  8. Home Phone (format 555-555-5555)
  9. Work Phone (format 555-555-5555)
  10. Birth Date (format mm/dd/yyyy)
  11. Last Four of SSN
  12. Driver's License Number
  13. Client Notes
  14. Last Request Date (format mm/dd/yyyy)
  15. Last Request Status (valid values Completed, Open, or Call Back)
  16. Last Request Notes

Some other guidelines to keep in mind:

- Do not use all capital letters for names or addresses
- Use consistent formatting for addresses (for example, always enter Drive as Dr. or spell out Drive)
- Last Request Notes are a good location for putting in past assistance information if it is available

## Conference Configuration

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Several screens that conference members will use to capture client and assistance request information require pre-populated information to make data entry quick and easy. As an administrator, it is your responsibility to make sure that these areas contain the appropriate information for your conference. You can add information as you go along, but it is best to populate the various areas with data that you currently use in your paper records before your conference members begin using ServWare.

On the following pages of this guide, you will find several screenshots that show the area of the application where the conference member will select the items that you create, followed by an explanation of how you can add items for that location.

### Define Assistance Types

Assistance types include the various types of assistance that you regularly provide to clients. Assistance types that you create are available for conference members to select when entering assistance request information. When defining assistance types, you can indicate that a quantity (qty) field is available for an assistance type. The qty field is then available for use on an assistance entry for the request.

To add assistance types, from the **Admin** menu, select **Assistance Types**, and then click **New Assistance Type**.

Assistance for Jack Sprat

\*Assistance Type: -- Select --

\*Value: -- Select --

Date Provided: [Empty]

Pending: [Empty]

Promised Date: [Empty]

Check Requested: [Empty]

Check Number: [Empty]

Notes: [Empty]

Save Cancel

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For the assistance type **Utilities**, you can capture additional information about the utility type so that it is available for selection when members add this assistance type. For example, you can add cable, gas, or electric companies for additional detail. The utilities you add are also available from the **View** menu. For details about adding utility categories, see [Add Utility Information](#). The image below shows where this information is available to your conference members.

Assistance for Alice Brown

\*Assistance Type: Utilities

Utility Name: -- Select --

\*Value: -- Select --

Date Provided: 07/21/2014

Pending:

Check Requested:

For in-kind assistance, you can add categories, such as food, clothing, or furniture, etc. For information about adding in-kind categories, see [Define In-Kind Categories](#).

For rent assistance, you can add landlord/housing providers. For information about adding landlord/housing providers, see [Define Landlord/Housing Information](#).

## Define Client Income and Expense Types

Client income types are used to capture information about household income such as employment income and child support. Client expense types includes information about household expenses such as rent and utilities. The items that you add will be available for selection from the Expense or Income lists when you are adding new clients to the system. You should have the most common income and expense types available for your members to select.

To add client income and expense types, from the **Admin** menu, select **Client Expense Types** or **Client Income Types**, and then click **New Expense Type** or **New Income Type**.

The screenshot shows the 'Income for Alice Brown' form in the ServWare interface. The 'Income Type' dropdown menu is open, showing the following options: Child Support, Social Security, Salary, HUD Utility Assistance, and Food Stamps. The form also contains fields for '\*Amount/Month', 'Date Verified', and 'Notes'. At the bottom, there are 'Save' and 'Cancel' buttons.

## Define Household Income Levels

If your conference has enabled the option to track household income levels (see [Conference Set Up](#)), you can define household income levels and then a level can be assigned to the household.

To add household income levels, from the **Admin** menu, select **Household Income Levels**. On the **Household Income Levels** page, click **New Income Level**. Household income levels that you add will be available for selection on the **Income** tab of the client record. Be sure to mark the levels “active” that you want available for selection.

The screenshot shows the 'Edit Income Level' form. It includes the following fields: '\*Level Name' (text input), 'Family Size' (text input), 'Monthly Inc Less Than' (text input), 'Annual Inc Less Than' (text input), and 'Notes' (text area). There is also an 'Active?' checkbox. At the bottom, there are 'Save' and 'Cancel' buttons.

## Define referral agencies

Referral agencies are organizations or agencies to whom you regularly refer your clients for additional assistance, for example, a local food pantry or community agency that provides utility assistance. The agencies that you add are then available for your members to select when indicating that a client has been referred outside of your conference for assistance.

To add referral agencies, from the **Admin** menu, select **Referral Agencies** and then click **New Referral Agency**.

Name	Phone	Website	Description	Active
Diakonia				✓
Red Cross				✓
St. Referral Conference				✓
SVDP SH@gmail.com			Generic Sacred Heart logon id	✓
SVDP SHCloth			Clothing Ministry	✓
SVDP SHFurn	941-575-8544		Furniture Ministry	✓
SVDP SHHW			Housewares Ministry	✓

Referral agencies that you add are available for selection on assistance requests in the **Referral Information** area.

Assistance Request - Christopher Test

Created by swuser5 on 01/07/2018 05:10 PM / Last Modified by swuser5 on 01/07/2018 05:48 PM

General | Family Members | Assistance | History

\*Status: Completed | \*Request Date: 01/07/2018 | Request Notes: food cards

Address: 1111 anywhere, Fairfield, OH 45014 | Contact Information: 513111-1111 (Home) (Mobile) | (Work)

Visit Details:  Home Visit,  Other Visit,  Visit Complete? | Assigned To (1): Demo, Joan | Assigned To (2): -- Select --

Scheduled Date: 01/07/2018 | Time hh:mm AM/PM: 12:00 AM | Duration (Minutes): 30 | Visit Notes:

**Referral Information**

Referred to Conference |  Referred to Agency

Agency 1: -- Select -- | Agency 2: -- Select -- | Agency 3: -- Select -- | Agency 4: -- Select --

Referral Note:

Save | Cancel

Additionally, referral agency information that you add can be viewed in one location by clicking the **View** menu and then selecting **Referral Agencies**.

## Add Utility Information

Utility categories (such as electric, water, and gas) can be selected while adding an assistance request. Additionally, detailed information about the utility can be viewed from the **View** menu in order to be helpful to conference members when working with clients and requests.

To add utility information, from the **Admin** menu, select **Utilities**. From the **Utilities page**, you can add, edit, and manage utilities that are used by your clients. For each utility, you can add the name, phone number, Website, and description. You can also specify if the utility is active. All active utilities will display on the **View > Utility Details** page as well as be available for selection when adding utility assistance on a request.

Name	Phone Number	Website	Description	Active
Charlotte County Utilities (CCU)			water	
DP&L	937-888-9898	<a href="https://www.dpandl.com/">https://www.dpandl.com/</a>	Local electric utility provider	✓
Florida Power & Light (FPL)			electric utility	
Montgomery County Water	937-323-1212	<a href="http://www.mcoho.org/departments/water_services/index.php">http://www.mcoho.org/departments/water_services/index.php</a>		✓
Vectren - Natural Gas	937-643-1232	<a href="https://www.vectren.com/">https://www.vectren.com/</a>		✓

## Define In-Kind Categories

In-kind categories are used to track the types of in-kind goods you are providing, such as food, clothing, furniture, etc. when you are entering assistance requests. The in-kind categories that you add are available for selection on the assistance request after selecting **In-Kind** as the **Assistance Type**.

To add in-kind categories, from the **Admin** menu, select **In-Kind Categories** and then click **New Category**. For each category, you must select either **Goods** or **Services**.

## Define In Service Categories

In-service categories are used to track the type of service you are providing, such as call taking or home visits, when you are tracking mileage and/or hours in service for your conference. The in-service categories that you add are then available from the **Mileage/Hours in Service** page that is accessed from the **Mi/Hrs** menu. Your conference must be set up to track mileage and hours in order for the **Mi/Hrs** menu to be available.

To add in-service categories, from the **Admin** menu, select **In-Service Categories** and then click **New In-Service Category**.

In-service categories that you add are available from the **In-Service Category** dropdown list on the **Mileage/Hours in Service** page.

The screenshot shows the 'Mileage/Hours in Service' form in the ServWare application. The form has a header with navigation links: Home, Clients, Requests, View, MI/Hrs, Reports, Finance, and Admin. The form fields are:
 

- \*Date: A text input field.
- Conference Member: A dropdown menu with '-- Select --'.
- Mileage: A text input field.
- Hours: A text input field.
- In-Service Category: A dropdown menu with '-- Select --' and a list of options: -- Select --, Call Taking, Home Visits, and Conference Meeting.
- Description: A text input field.

 At the bottom of the form are two buttons: 'Save' and 'Cancel'.

## Define Landlord/Housing Information

Landlord/housing provider information can be defined and then selected for rent/housing assistance requests. Conference users will be able to select the landlord/housing information that is defined when adding rent assistance requests.

To add landlord/housing information, from the **Admin** menu, select **Landlords/Housing**, and then click **New Housing Entry**. Enter the appropriate information for the housing provider. You can indicate if a 1099 will be required for the housing provider, and indicate if your conference has a copy of the housing provider's W9 (including the date you received it).

Conference members can also view this information from the **View > Landlords/Housing** page.

## Define Member Roles

Conference member roles can be defined and then selected for a member as a primary and/or secondary role. If your conference would like to add member roles, from the **Admin** menu, select **Member Roles** and then click **New Membership Role**. Roles that you want available for selection on the conference member record must be set to active.

## Define In Kind Categories

In Kind categories are used to track items that were donated to your conference and then provided as assistance to clients. All conferences are initially set up with the four standard in-kind categories – clothing, food, furniture, and other. You should not need to enter new in-kind categories unless you have some special circumstance that requires tracking of additional categories. The in-kind assistance type is available from the **Assistance Type** list for an assistance request. The **In-Kind Category** is a sub-list for the **In-Kind** assistance type.

To add In-Kind categories, from the **Admin** menu, select **In-Kind Categories** and then click **New Category**.

The screenshot shows the 'Assistance for Ann Able' form in the ServWare application. The form includes the following fields and options:

- \*Assistance Type:** In-Kind (dropdown menu)
- In-Kind Category:** -- Select -- (dropdown menu, currently open with options: Other, Clothing, Food, Furniture)
- \*Value:** (text input field)
- Date Provided:** (text input field)
- Pending:**
- Promised Date:** (text input field)
- Check Requested:**
- Check Number:** (text input field)
- Notes:** (text area)

At the bottom of the form, there are **Save** and **Cancel** buttons.

## Conference Set Up

Information about your conference can be captured on the **Conference Details** screen. You can access this screen from the **Admin** menu.

The screenshot shows the 'Conference Details - SW Demo' form in the ServWare application. The form is titled 'Conference Details - SW Demo' and includes a breadcrumb trail: Home > Clients > Requests > View > Mi/Hrs > Reports > Finance > Admin > SWadmin1 @ SW Demo. The form is divided into three tabs: 'Conference Details', 'Configuration Options', and 'Officers'. The 'Conference Details' tab is active, showing the following fields:

- \*Contact First Name: John
- \*Contact Last Name: Doe
- District: SW Demo District
- \*Address Line 1: 123 Main Ave.
- Address Line 2: (empty)
- City: Dayton
- State Code: OH
- Postal Code: (empty)
- Help Line Phone: 937-545-8974
- Work Phone: (empty)
- Home Phone: (empty)
- Mobile Phone: 513-432-3546
- Email: jdoe@gmail.com
- Default User Password: Password1
- Meeting Frequency: Twice Monthly
- Date of Founding: (empty)
- Date of Aggregation: (empty)
- Active Spiritual Advisor:
- Incorporated:

At the bottom left, there are 'Save' and 'Cancel' buttons. The footer of the form displays '2018 ServWare © org.servware-1.15.2-20180326-221625'.

In addition to general conference contact and address information, there are several configuration options that are available on the **Configuration Options** tab. Administrators can turn configuration options on or off as needed.

The following list describes the options that are available for use by conferences:

- **Report Period.** Select the report period (fiscal year or calendar year) that you want used for default annual report date ranges.
- **History Total Options.** Select the options for total calculations for friend in need history (that displays on the **History** tab of a client record). By default, all conferences are set up to show **All History**, **Current Year**, and **Previous Year**, however, as an administrator, you can select the history total options needed by your conference. Other options that are available include **Last 12 Months**, **Last 6 Months**, and **Last 3 Months**.
- **Direct Payment Voucher Tracking.** When this is enabled, your conference can track vouchers that your conference purchases for assistance, such as bus passes, Kroger gift card, gas cards, etc. When your conference is configured to track direct payment vouchers, then an assistance type can be flagged as DPV (direct payment voucher) and a quantity can be entered. This quantity is shown on the home page and is decremented as the DPV item is provided on assistance requests.
- **Mileage/Hours Tracking.** When this is enabled, the **Mi/Hrs** menu option will be available to conference members. On the **Mileage/Hours in Service** page, conference members can track their mileage and/or hours in service. This option also allows you to run **Mileage/Hours in Service** reports that are available from the **Reports** menu.

- **Conference Member Assignment on Req.** When this is enabled, a specific conference member can be assigned to the entire assistance request. A selection list will be available on the assistance request **General** tab. Enabling this option also makes another report available in the **Reports** menu – **Request Assignment Report**.
- **Conference Member Assignment on Assistance.** When this is enabled, a specific conference member can be assigned to an individual assistance item. A selection list will be available on the assistance item.
- **Record Call Intake Person.** When this is enabled, an intake person can be captured on an assistance request.
- **Case Number Support.** When this is enabled, you can specify if you want to assign case numbers to clients or requests.
  - **Case numbers on client records.** If you select this option, there will be a case number field available on a client that can either be auto generated or entered manually. Case numbers that are entered on the client record are copied to assistance requests that are created for that client. If you select the **Auto Generate Case Numbers** option for case numbers, the system will auto generate case numbers on the client records. Even if the case number is generated, it can be overridden. Case numbers must be unique within a conference.
  - **Case numbers on requests.** If you select this option, there will be a case number field available on a request that can either be auto generated or entered manually. If you select the **Auto Generate Case Numbers** option for case numbers, the system will auto generate case numbers on your requests. Even if the case number is generated, it can be overridden. Case numbers must be unique within a conference.
- **Financial Functions.** When this is enabled, the **Finance** menu is available in the top menu bar and provides access to the ServWare financial functions. You can also choose to restrict finance updates to only admin users.
- **Household Income Levels.** When this is enabled, household income levels can be defined and assigned to friends in need. For more information about adding household income levels, see [Define Household Income Levels](#).
- **File Uploads for All Users.** When this is enabled, all member in the conference will have the ability to upload files for the conference. When this is not enabled, only conference administrators can upload files.
- **Apply Phone Number Format.** When this is enabled, information entered in phone number fields must use the following format 555-555-5555.
- **Enter Default Mi/Hrs for Members.** When this is enabled, a default value for Mi/Hrs can be set for an individual conference member. The default amount would then be used for each new entry for that member.
- **Assign Conference Member Roles.** When this is enabled, roles can be defined and assigned to conference members. Administrators can perform the following tasks once this option is enabled:
  - **Define Member Roles.** From the **Conference Details** page, there will be a new **Admin** menu option, **Conference Member Roles**, that can be used to define roles for the conference (for example, call taker, home visitor, food pantry).
  - **Assign Member Roles.** Once member roles have been enabled for a conference, then primary, secondary, and other roles can be assigned to a member on the **Conference Member** page.
  - **Member Roles on Conference Member List.** If enabled conference member roles will display on the **Admin > Conference Members** page.

You can also add and edit conference officer details on the **Officers** tab of the **Conference Details** page. On the **Officers** tab, you can maintain a list of all active and non-active officers that includes their role within the conference.

**NOTE:** Districts that are configured to edit conference details also have the ability to enter conference officer information when editing a conference from the District **Home** page.

Conference Details - SW Demo  
Created by mstine on 09/21/2015 08:55 PM / Last Modified by mstine on 01/11/2017 10:41 PM

Conference Details Officers

New Officer

Active Officers

	Name	Role	Effective Date	End Date	Notes	
Edit	Jack Jones	Vice President	01/01/2017			Delete
Edit	Joe Admin	President	01/01/2017			Delete

Non-Active Officers

	Name	Role	Effective Date	End Date	Notes	
Edit	Beth SWadmin	President	01/01/2016	12/31/2016		Delete

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## Conference Calendar and Messaging

Your conference calendar and messages appear on your conference home page. Post important dates and scheduled visits on your calendar. Post conference messages for members to view on your home page. Only administrator users can create conference messages. To create a new message, from the **Admin** menu, select **Messages** and then click **New Message**. If you would like to send the message in an email to your conference members in addition to posting it to your home page, select the **Email to Members** option on the **Edit Conference Message** page.

To add an event to your home page calendar, from the **View** menu, select **Calendar Event** and then click **New Event**. Only administrator users can create calendar events. If you would like to send the calendar event information in an email to your conference members in addition to posting it to your home page, select the **Email to Members** option on the **Edit Calendar Event** page.

If you select the **Email to Members** option for either messages or calendar events, the information will be sent to all active conference members with an email address assigned.

## File Administration

ServWare provides a file administration area where you can save files that can be accessed by your conference members. The files can be organized by folders that you create. By default, only administrators can upload and manage files/folders in the file administration area. However, there is a conference configuration option that you can turn on to allow all conference members the ability to upload and manage files in this area. For more information about this configuration option, see the [Conference Set Up](#) section of this document.

There are three tabs on **File Administration** page that provide access to different files.

- **Conference.** The **Conference** tab can be used to upload files and create folders to organize groups of files for your conference. Files uploaded to this section can only be uploaded at the conference level.
- **District.** Files that are available on the **District** tab (this tab may not be available for your conference if you are not utilizing district features), can only be uploaded at the district level.
- **ServWare.** The ServWare documentation is available on the **ServWare** tab. Files that are available for viewing from this tab have been added by the ServWare administrator.

The screenshot displays the ServWare File Administration interface. At the top, there is a navigation menu with options: Home, Clients, Requests, View, M/Hrs, Reports, Finance, and Admin. The user is logged in as SWAdmin2 @ SW Demo. The main content area is divided into two sections: 'Conference Folders' and 'Conference Files'. Both sections have a search bar and a 'New Folder' or 'New File' button. The 'Conference Folders' section shows a table with columns for Folder Name, Description, and Date Created. It lists two folders: 'Call Takers' (Documents supporting call takers, 08/23/2016 06:45 PM) and 'Client Documents' (01/04/2018 09:30 PM). The 'Conference Files' section shows a table with columns for File Name, Description, Date Added, and Added By. It lists four files: '2015 SWIP Pantry List-Cent-Wash Twp.doc' (09/22/2015 09:23 PM, SWAdmin1), '2015-10 Home Visit Schedule.pdf' (09/22/2015 09:25 PM, SWAdmin1), 'Client Call Record.pdf' (Client Call Record Format, 11/19/2015 08:02 PM, SWAdmin2), and 'GUIDELINES FOR CALL TAKERS.docx' (09/23/2015 10:40 PM, SWAdmin1). A red arrow points to the 'New File' button in the 'Conference Files' section.

To create a folder to organize a set of files, do the following:

1. From the **Admin** menu, select **File Administration**.
2. On the **Conference** tab, click **New Folder**.
3. Enter a name and optional description for the folder.
4. Select the **Admin Access Only** flag if you want to only allow administrators the ability to view the folder and its contents. This would allow more sensitive documents to be put in a folder that only administrative users could access. Leave this option unchecked if you want the folder and its contents to be available to all users.
5. Click **Save**.

To upload files to the **Conference Files** area, do the following:

1. From the **Admin** menu, select **File Administration**.
2. In the **Conference Files** area, click **New File**.
3. Add a description for the file that are going to upload. This description should help your conference members understand the purpose of the file.
4. Browse to find the file on your computer or device.
5. After selecting the appropriate file, click **Save**.

Conference folders can be created and used to group files together. For example, you may want to create a call taker folder and upload files that pertain to the call taker activities. After you create a folder, you can upload files to the folder.

To update an existing files in the **Conference Files** area, do the following:

1. Locate the file that you want to replace.
2. Click **Edit** next to the file.
3. Browse and select the new file that you want to upload, add an optional description, and then click **Save**.  
The newly selected and uploaded file will replace the original file.

## Generating reports

To run report, select the appropriate item from the **Reports** menu. You can generate the following types of conference reports:

- **Help Line/Request Activity.** The **Help Line/Request Activity Report** provides a summary of assistance requests for the specified time period. The columns shown can vary based on the conference configuration options selected.
- **Request Activity.** The **Activity Summary Report** provides a summary report of monthly and fiscal year statistics showing assistance provided by your conference. Utilities and In-Kind categories are calculated both at the individual level (gas, electric, water, etc.), as well as at the top level. Be sure not to count the totals twice in your reporting.
- **Assistance Request Detail.** The **Activity Detail Report** displays the details of a specific assistance request, includes request history, and is useful for home visits. You can filter the report by assistance type to only show requests where that specific assistance type was provided. Keep in mind that the report may show assistance for other assistance types as well if they were also provided on the request.
- **Assistance Request Check Report.** The **Activity Checks Report** displays the details of checks that were written in association with assistance requests. In order to run this report, your conference must be

configured with the conference financial functions. See below for more information about the available financial options.

- **Request Assignment.** The **Request Assignment Report** is only available if your conference has enabled the **Conference Member Assignment on Req** configuration option for your conference. This option allows a specific conference member to be assigned to the entire assistance request. The **Request Assignment Report** displays all requests for a specific time period and who is assigned to each request.
- **Mileage/Hours in Service.** There are both a summary and detail mileage/hours in service report available. In order to run this report, you must have the **Mileage/Hours Tracking** ServWare Configuration Option enabled. For more information about this option, see the **Conference Set Up** section on the previous page.
- **Conference Member.** The **Conference Members Report** provides a summary report of active conference member contact information.
- **Conference Membership Summary.** The **Conference Membership Summary** report provides a summary of the demographics of the active conference members.

## Export Client or Request Data

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You have the ability to export client or request data from ServWare to an Excel file for your use. This may be useful if you want to sort or view the data in a different way than it is available in ServWare.

To export data from ServWare, do the following:

1. From the **Admin** menu, select **Export Client Data** or **Export Request Data**.
2. Locate the exported .csv file. This downloaded file is normally located at the bottom of your browser window.
3. Click the file to open it in Excel. You can then modify and save the data for your needs.

## Conference Finances

Financial functions can be enabled for a conference. If you would like to manage the financial functions of your conference in ServWare, you must request that these options be enabled for your conference. When the financial functions are enabled, a **Finance** menu is available to track conference expenditures, receipts, and deposits. You can create expenditure, receipt, and deposit types, if you want, and then you can run both summary and detail reports on these categories.

The screenshot displays the 'Expenditure Types' management page in ServWare. The interface includes a navigation bar with 'Home', 'Clients', 'Requests', 'View', 'MI/Hrs', 'Reports', 'Finance', and 'Admin'. The 'Finance' dropdown menu is open, showing options for 'Conference Expenditures', 'Conference Receipts', 'Conference Deposits', 'Expenditure Types', 'Receipt Types', 'Deposit Types', and various reports like 'Expenditure Summary Report' and 'Expenditure Detail Report'. The main content area shows a table of expenditure types with columns for Name, Description, and Active status. A search bar and a 'New Expenditure Type' button are also visible.

Name	Description	Active
Bus Pass - Tokens		✓
Costco Food	Food	✓
Electric - DPL		✓
Gas - Vectren		✓
IDs - Birth Certificates	IDs - BCs	✓
Kroger Food	Food	✓
Misc.		✓
Non Food Kroger	Taxable	✓
NonFood Costco	Taxable	✓
Office		✓

Showing 1 to 10 of 12 entries

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