



USER GUIDE

RCS-IMPACT Reporting Application **(Business Intelligence Technology using APEX)**

IMPACT **Intelligent Monitoring of Performance and Activities**

[Abstract](#)

A reference guide to the essential features of APEX and the Festival Reporting module

RCS-APEX-Provincial Users (TO_V.2)

Table of Contents

Introduction	3
How to Login To the Festival Reporting Module	3
Home Page	4
Changing Your Password.....	4
Festival Reports.....	6
Page Layout.....	8
Downloading Data to Excel	10
Downloading Individual Lodge Reports	11
Customising Data	12
Accessing APEX options	12
Column Headings	12
Search Bar	13
Actions Menu	13
Actions Menu - A look at the Options Available	14
Actions → Select Columns	14
Actions → Filter	14
Actions → Rows Per Page	15
Actions → Format → Sort.....	15
Actions → Format → Control Break	16
Actions → Format → Highlight	16
Actions → Format → Aggregate	17
Actions → Format → Chart.....	17
Actions → Format → Group by.....	18
Actions → Format → Pivot	18
Actions → Flashback.....	19
Actions → Save Report	19
Actions → Reset.....	20
Actions → Help	20
Selected Report Customisation Options.....	20
Sharing Customised Reports (Report Administrators Only)	21
Maintenance (Data Administrators Only).....	23
Viewing Amendments.....	23
UGLE Lodge Membership Stats.....	24
Festival Lodge Membership Stats	24

Creating Festival Lodge Membership Stats.....	25
Editing /Deleting an Existing Lodge Entry	26
Lodge / Chapter Town or Group Maintenance	27
Adding a Town or Group	27
Editing a Town or Group	28
Inactivate a Town or Group	28
Delete a Town or Group.....	28
Lodge / Chapter Area or Centre Maintenance	29
Adding an Area or Centre.....	29
Editing an Area or Centre.....	30
Inactivate an Area or Centre	30
Delete an Area or Centre	30
Lodge / Chapter Group Assignments	31
Assigning a Lodge or Chapter to a Town or Group	31
Edit / Deleting a Lodge / Chapter Group Assignment.....	33
Honorifics Maintenance	34
Creating Lodge / Chapter Honorifics.....	35
Editing Lodge / Chapter Honorifics	36
Creating a Member Honorific	37
Editing Member Honorifics	37
Creating Lodge Festival Targets	38
Editing /Deleting an Existing Lodge Entry	39
DD Forecast End Date	40
Visualisation	41

Introduction

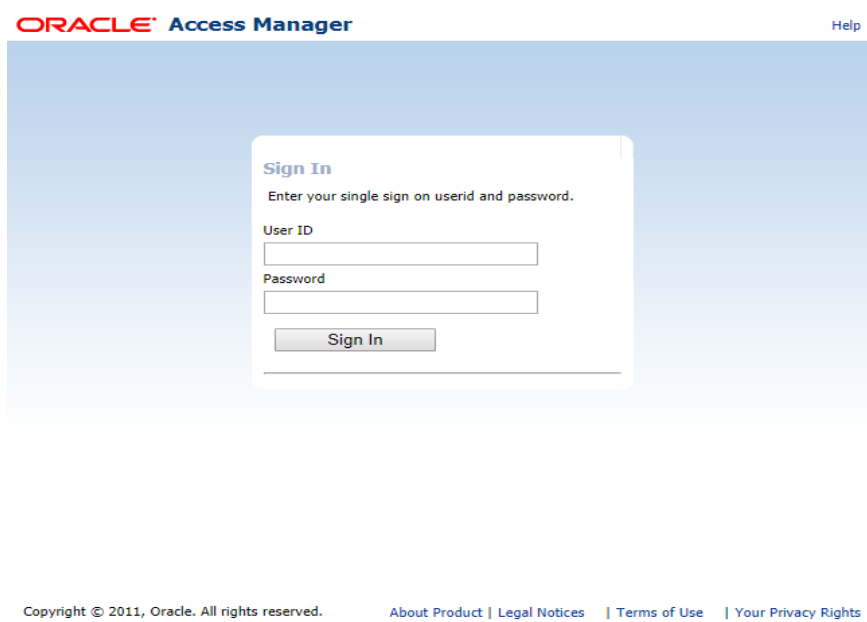
The Festival Reporting Module is a Business Intelligence Tool that has been developed using Oracle's **Application Express (APEX)**. APEX is a fully featured Integrated Development Environment (IDE) used to develop a vast array of applications, ranging from simple table driven applications, spreadsheet replacement applications, and complex interactive applications to Business Intelligence solutions.

How to Login To the Festival Reporting Module

To log into APEX you must first log into Oracle Access Manager (OAM) – this security layer authenticates and verifies your user account and allows access to applications developed using Oracle technologies. OAM is the gateway to all Oracle (and therefore APEX) applications.

To login do the following:

- In your browser type in the following URL: <https://adelphi2.ugle.org.uk/apex/f?p=110>
- Log in to OAM with your account details (usually your first Initial and Surname, i.e. PTAYLOR for Philip Taylor)

The screenshot shows the Oracle Access Manager (OAM) Sign In page. At the top left is the 'ORACLE Access Manager' logo, and at the top right is a 'Help' link. The main content area has a light blue background. In the center is a white box titled 'Sign In' with the instruction 'Enter your single sign on userid and password.' Below this are two input fields: 'User ID' and 'Password'. A 'Sign In' button is positioned below the password field. At the bottom of the page, there is a copyright notice 'Copyright © 2011, Oracle. All rights reserved.' and four links: 'About Product', 'Legal Notices', 'Terms of Use', and 'Your Privacy Rights'.

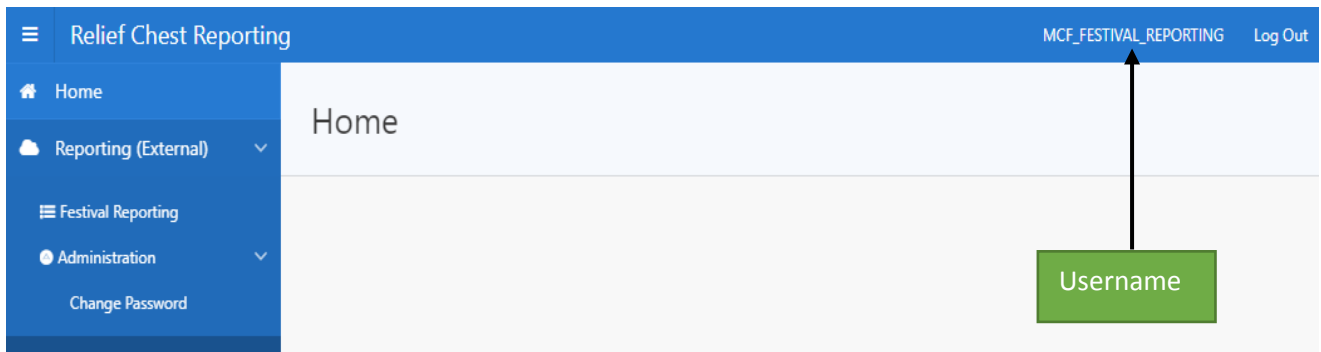
When you have logged into OAM you can then log into APEX as below:

- Log in to APEX with the same username as above and your password (note these are different user accounts and as such *can* have different passwords)

The screenshot shows the APEX Log In page. The title 'APEX Log In' is highlighted in yellow at the top left. Below it are two input fields: 'Username' and 'Password'. A blue 'Log In' button is located at the bottom right of the form.

Home Page

When you log in the Home page is displayed as below. From here you can change your password or go straight to Festival Reporting Pages



Changing Your Password

Click **Change Password** to access the Change Password page –

- Enter in your current APEX password and your new password
- Press the Change Password button

A screenshot of the 'Change Password' form. The breadcrumb trail at the top reads 'External Provincial Users / Administration /'. Below this is the title 'Change Password'. The form itself is a light gray box with the title 'Change Password' at the top. It contains two input fields: 'Current Password' and 'New Password'. To the right of the 'Current Password' field is a blue button labeled 'Change Password'. At the bottom left of the form is a blue button labeled 'Close'.

Please note that this will change your **APEX** user account password only.

In order to change your **OAM** user account password you must request this service from your Allocated support. ***If you are an ADELPHI 2 user then you need to request a new password from your existing contact.*** An automated email will be sent to the email address registered to your user account containing a temporary password.

The process from there is as below:

- Log into Adelphi 2 using this URL <https://adelphi2.ugle.org.uk/ADelphi2/faces/master.jspx> (Adelphi 2 is the application that in effect runs OAM and as such is the place to change your OAM password)
- The change password page (below) will be displayed
 - Enter in the temporary password from the automated email
 - Enter in your new password
 - Repeat the password
 - Press OK

Note the following password format rules:

- Must contain at least one uppercase letter
- Must contain at least one lowercase letter
- Must contain at least one number
- Must contain at least one special character (\$ or #)
- Must be at least 8 characters in length



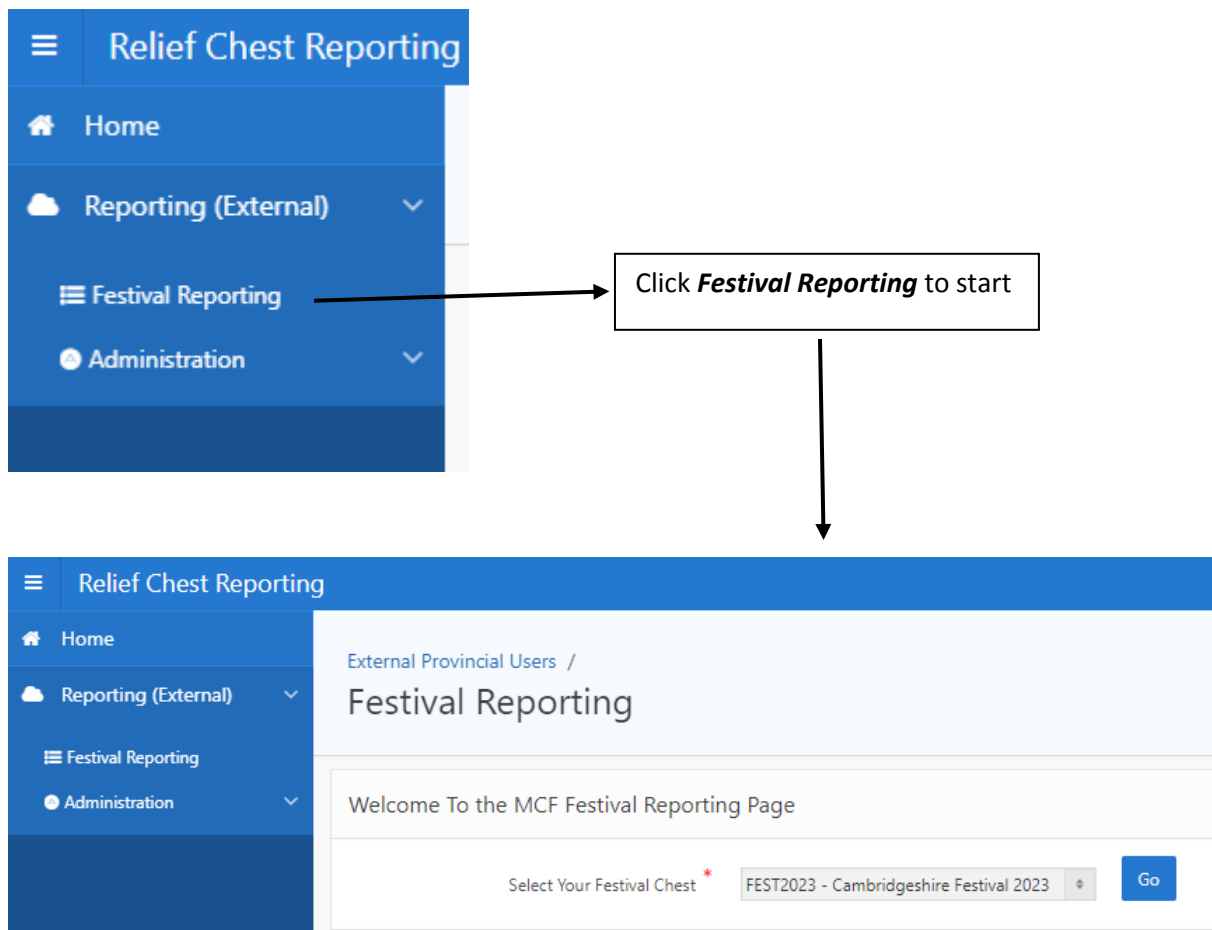
UNITED GRAND LODGE
OF ENGLAND

* Current Password

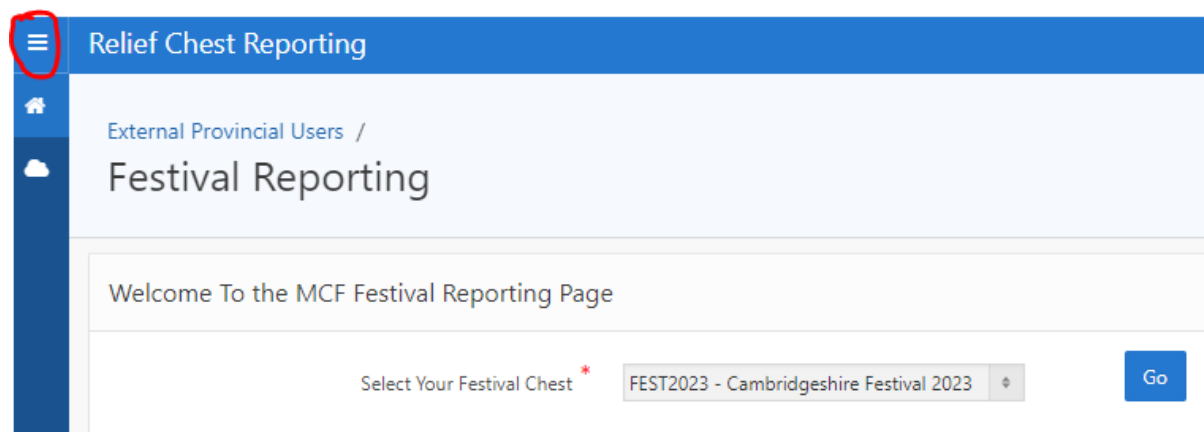
* New Password

* Confirm Password

Festival Reports



To maximise the page real estate click on the three lines above the menu as below



This user has access to FEST2023 – Click **Go** to access the Reporting Data

The reporting data is retrieved from a dedicated reporting area and displayed on the main Festival Reporting Page.

A couple of things to note -

The reporting data has been crystallised by the Relief Chest month-end process. When month end is run all Festival data is queried, computed and stored in a set of dedicated tables, therefore they will remain unchanged until the next month-end process is run.

The date of crystallisation is displayed below – this is important as it lets you know when the data was last updated.

An 'As at date' is also displayed, again this is important as it lets you know the period the reporting data covers, i.e. from the Chest opened date to the 'as at date'.

Relief Chest Reporting MCF_FESTIVAL_REPORTING Log Out

External Provincial Users /

Festival Reporting For FEST2023

Festival Report for FEST2023 (Cambridgeshire Festival 2023) as at 31-JAN-2019. Report crystallised on: 31-JAN-2019

Balance Error Text Here

Download the Complete Report to Excel

Reconciliation Lodge Lodge Summary Member Member Summary Contract Type Summary Lodge Grouping Summary Tools Notes

Reconciliation

Report Total	£227,781.55
Less Donations Made	£184,887.71
Closing Balance as per Reporting	£42,893.84
Closing Balance as per Relief Chest Statement	£42,893.84
Balance Difference	£0.00

Now we know the parameters of the reporting data the next thing to look at is the reconciliation data – this is the same principle as used in the Festival spreadsheets. A balance Difference of £0.00 indicates that the reporting data agrees with the statement data. If there is a difference then this is highlighted with the following text (which is displayed below the difference plus it remains visible above the reporting data as indicated)

A Balance error exists in the Festival Report - The two closing balances in the Reconciliation Tab should agree. Please contact your Allocated Support.

Page Layout

The Festival Reporting page is split into 5 sections all of which can be expanded and contracted as below.

Festival Reporting

▶ Main Festival Report for FEST2023 (Cambridgeshire Festival 2023) as at 30-APR-2019. Report Crystallised on: 02-MAY-2019

▶ Secondary Festival Report for FEST2023 (Cambridgeshire Festival 2023) as at 30-APR-2019. Report Crystallised on: 02-MAY-2019

▶ Maintenance

▶ Visualisation

▶ Visualisation Examples

▼ Main Festival Report for FEST2023 (Cambridgeshire Festival 2023) as at 30-APR-2019. Report Crystallised on: 02-MAY-2019

RefreshShare a Report

Real Time Festival Total£534,250.89?

ReconciliationSummaryLodgeLodge SummaryMemberMember SummaryToolsNotes

Reconciliation

▼ Secondary Festival Report for FEST2023 (Cambridgeshire Festival 2023) as at 30-APR-2019. Report Crystallised on: 02-MAY-2019

▼ Maintenance

Refresh


Lodge MembershipsLodge / Chapter StructureHonorificsLodge Festival TargetsDD Forecast End Date

Lodge Memberships


UGLE Lodge Membership StatsFEST2023 Lodge Membership Stats

UGLE Lodge Membership Stats

Page 8 of 42

 Visualisation


Refresh

Download All Charts 

Festival Totals by lodge

Downloading Data to Excel

Assuming we have a zero balance difference, you can download the data to Excel if you wish. This can be done in one of two ways. To generate one spreadsheet with multiple tabs click the

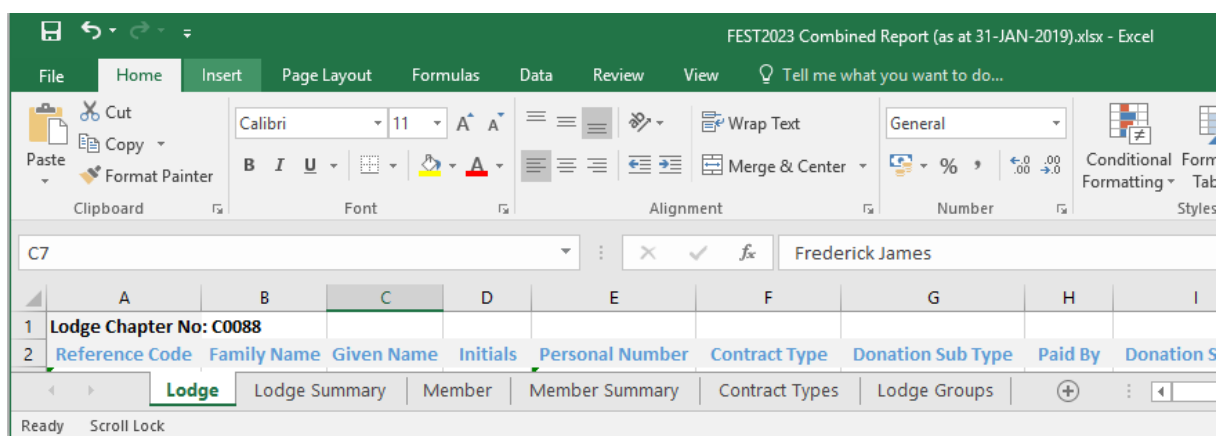
[Download the Complete Report to Excel](#) 

button.

This button remains visible when you are in the Festival Report section of the page.

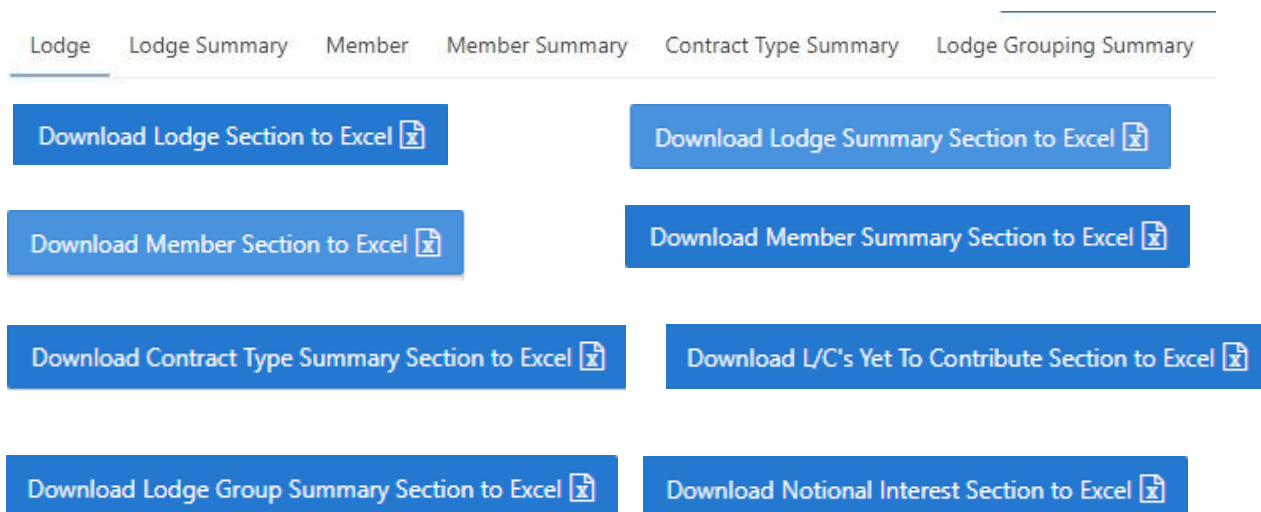
▼ Festival Report for FEST2023 (Cambridgeshire Festival 2023) as at 31-JAN-2019. Report crystallised on: 31-JAN-2019

Example Excel Report



Alternatively, you can download each section of the report separately by pressing the download button located in each of the Reporting tabs as below:

Reporting Tabs



Each downloaded file has the following naming convention

- Chest Number – Report description - (as at date), i.e.
 - *FEST2023 Combined Report (as at 31-JAN-2019).xlsx*
 - *FEST2023 Lodge Report (as at 31-JAN-2019).xlsx*


Festival Reporting User Guide

When you download the data using the download to Excel buttons mentioned above, it is important to remember that the Excel spreadsheet will contain exactly what is being displayed on screen including any highlighting, i.e. it is 'wysiwyg' (What you see is what you get).































This allows you to tailor your download for a specific purpose by hiding / rearranging columns, filtering data plus a whole host of other data manipulation tools and functions some of which are described in the next section of this guide.

Downloading Individual Lodge Reports

Individual reports for each unit within the province covered by the festival can be downloaded by pressing this button.

[Download Individual Lodge Reports to Excel](#) 

The result is a zip file containing individual Excel files – as this is not generated from on-screen data there is no highlighting.

This PC > Downloads > FEST2023 Individual Lodge Report (as at 31-JAN-2019).zip					
Name	Type	Compressed size	Pass...	Size	Ratio
 FEST2023 Lodge Report for C0088 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	13 KB	No	14 KB	9%
 FEST2023 Lodge Report for C0112 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	8 KB	No	9 KB	11%
 FEST2023 Lodge Report for C0441 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	14 KB	No	15 KB	9%
 FEST2023 Lodge Report for C0859 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	19 KB	No	21 KB	9%
 FEST2023 Lodge Report for C2107 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	18 KB	No	20 KB	10%
 FEST2023 Lodge Report for C2727 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	11 KB	No	12 KB	9%
 FEST2023 Lodge Report for C3201 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	14 KB	No	15 KB	9%
 FEST2023 Lodge Report for C3532 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	15 KB	No	17 KB	9%
 FEST2023 Lodge Report for C4087 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	8 KB	No	9 KB	10%
 FEST2023 Lodge Report for C7333 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	39 KB	No	44 KB	12%
 FEST2023 Lodge Report for C7429 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	18 KB	No	19 KB	10%
 FEST2023 Lodge Report for C8374 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	16 KB	No	17 KB	9%
 FEST2023 Lodge Report for FEST2023 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	75 KB	No	86 KB	13%
 FEST2023 Lodge Report for L0088 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	12 KB	No	13 KB	8%
 FEST2023 Lodge Report for L0441 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	16 KB	No	17 KB	8%
 FEST2023 Lodge Report for L0809 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	24 KB	No	26 KB	9%
 FEST2023 Lodge Report for L0859 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	12 KB	No	13 KB	8%
 FEST2023 Lodge Report for L1492 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	32 KB	No	35 KB	9%
 FEST2023 Lodge Report for L2107 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	10 KB	No	11 KB	9%
 FEST2023 Lodge Report for L2684 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	8 KB	No	9 KB	10%
 FEST2023 Lodge Report for L2727 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	31 KB	No	34 KB	11%
 FEST2023 Lodge Report for L3201 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	12 KB	No	13 KB	8%
 FEST2023 Lodge Report for L3532 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	9 KB	No	10 KB	10%
 FEST2023 Lodge Report for L4087 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	15 KB	No	16 KB	7%
 FEST2023 Lodge Report for L4334 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	14 KB	No	15 KB	8%
 FEST2023 Lodge Report for L4520 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	10 KB	No	11 KB	9%
 FEST2023 Lodge Report for L5810 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	18 KB	No	20 KB	7%
 FEST2023 Lodge Report for L6125 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	24 KB	No	26 KB	8%
 FEST2023 Lodge Report for L6179 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	10 KB	No	11 KB	9%
 FEST2023 Lodge Report for L6704 (as at 31-JAN-2019).xlsx	Microsoft Excel Worksheet	19 KB	No	20 KB	8%

Customising Data

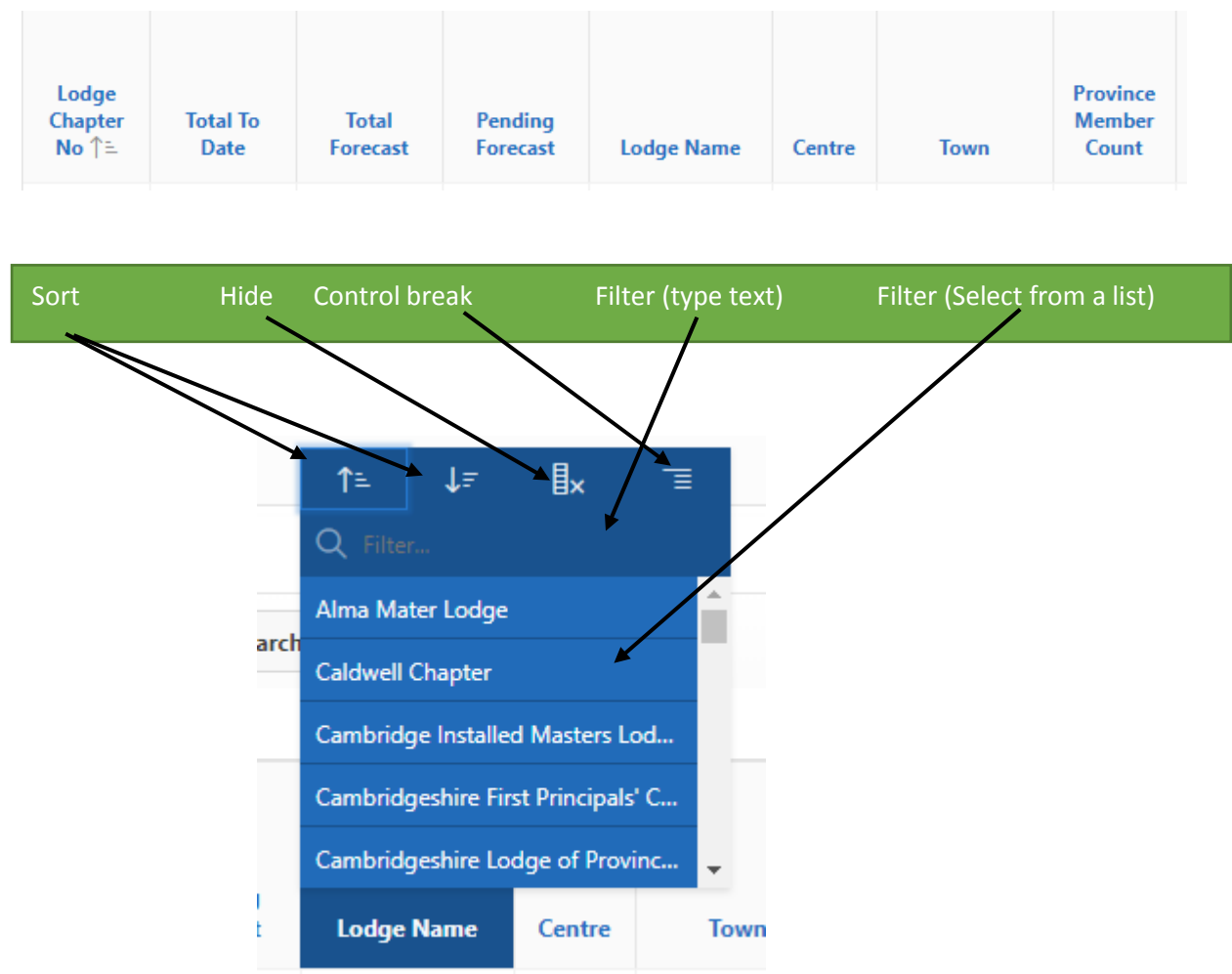
As mentioned APEX allows you to customise your data to view on-screen or to download. These customisations can also be saved in APEX as reports against your user account allowing you to build up your own personal library of reports.

Accessing APEX options

Column Headings

Clicking on any column heading, as below, reveals a submenu that allows you to sort the data, hide the column, add a control break and filter by typing in text next to the magnifying glass or by selecting from the list of values for that column.

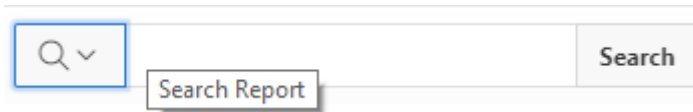
Column headings



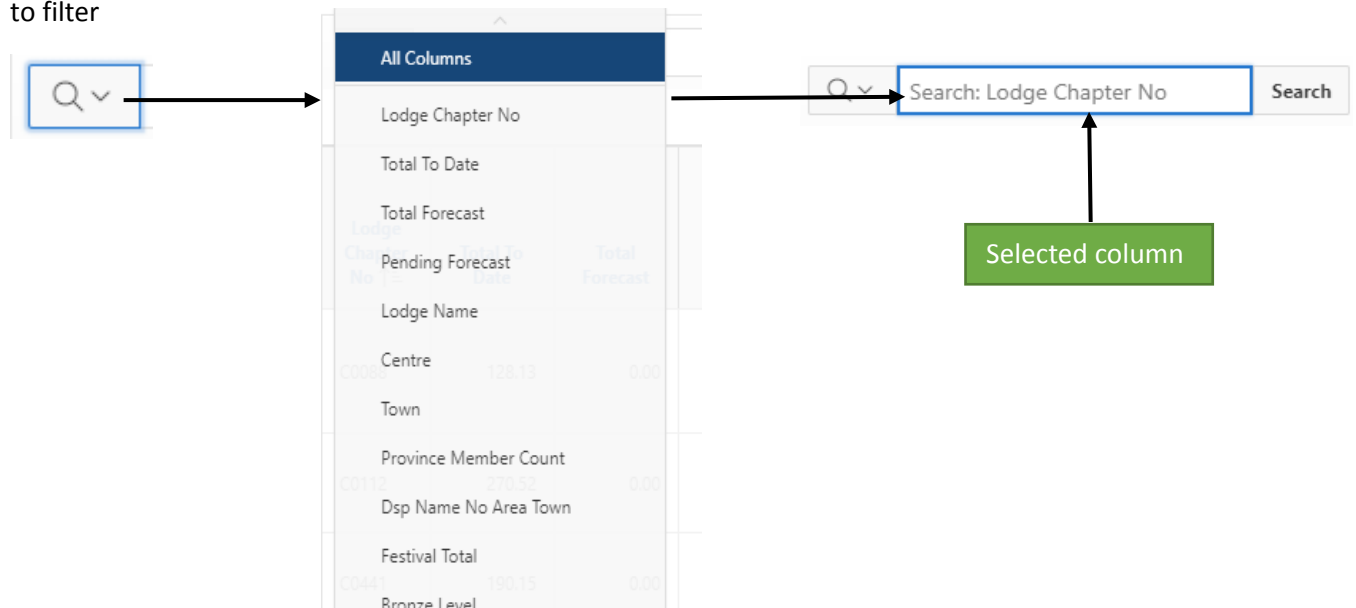
Search Bar

You can also filter your data at row or column level using the Search Bar

Row level – type in the box to search for text in any column of the report data

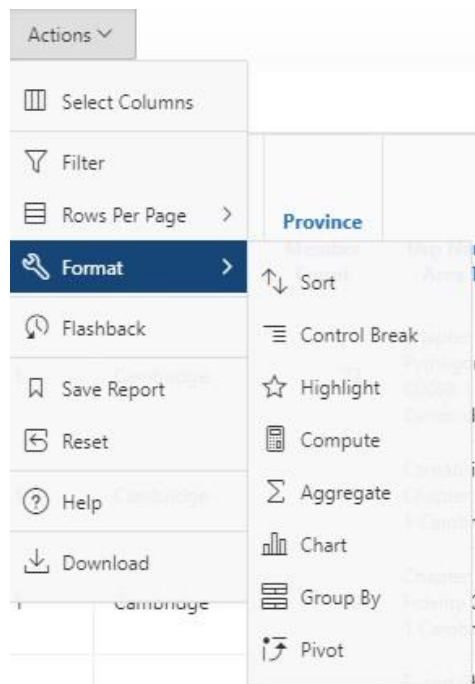


Column Level – Click on the magnifying glass below, select a column from the list, type in your text to filter



Actions Menu

The same options, as well as a few others, are available from the APEX Actions menu – these options from the Actions menu also offer increased functionality.

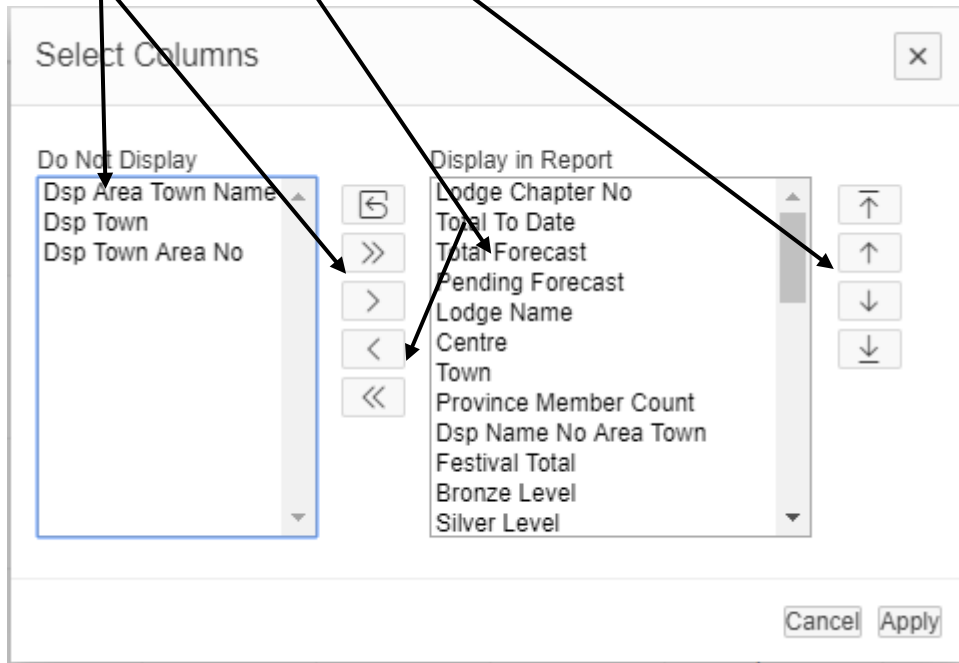


Actions Menu - A look at the Options Available

Actions → Select Columns

Allows you to:

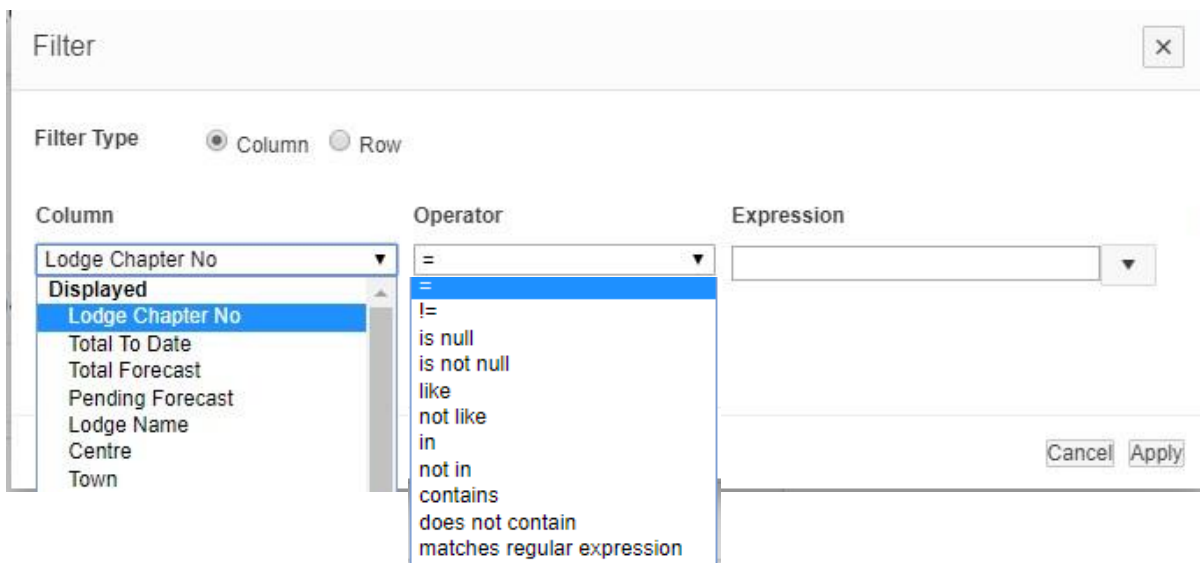
- Re-order columns
- Hide columns
- Add columns



Actions → Filter

Allows you to filter on any column using an array of operators.

Multiple filters can be added one at a time



Actions → Rows Per Page

Allows you to select the number of rows visible on the page

1

5

Summary10

15

20

25

50

100

1000

All

Format

Actions → Format → Sort

Allows you to sort by multiple columns simultaneously

Sort

	Column	Direction	Null Sorting
1	Lodge Chapter No	Ascending	Default
2	- Select Column -	Ascending	Default
3	- Select Column -	Ascending	Default
4	Displayed	Ascending	Default
5	Lodge Chapter No	Ascending	Default
6	Total To Date	Ascending	Default
	Total Forecast	Ascending	Default
	Pending Forecast	Ascending	Default
	Lodge Name	Ascending	Default
	Centre		
	Town		
	Province Member Count		
	Dsp Name No Area Town		
	Festival Total		

CancelApply

Actions → Format → Control Break

Allows you to add multiple Control Breaks – Every time the value of the control break changes the report adds a break, which is a blank line. This blank line is where any aggregates are displayed.

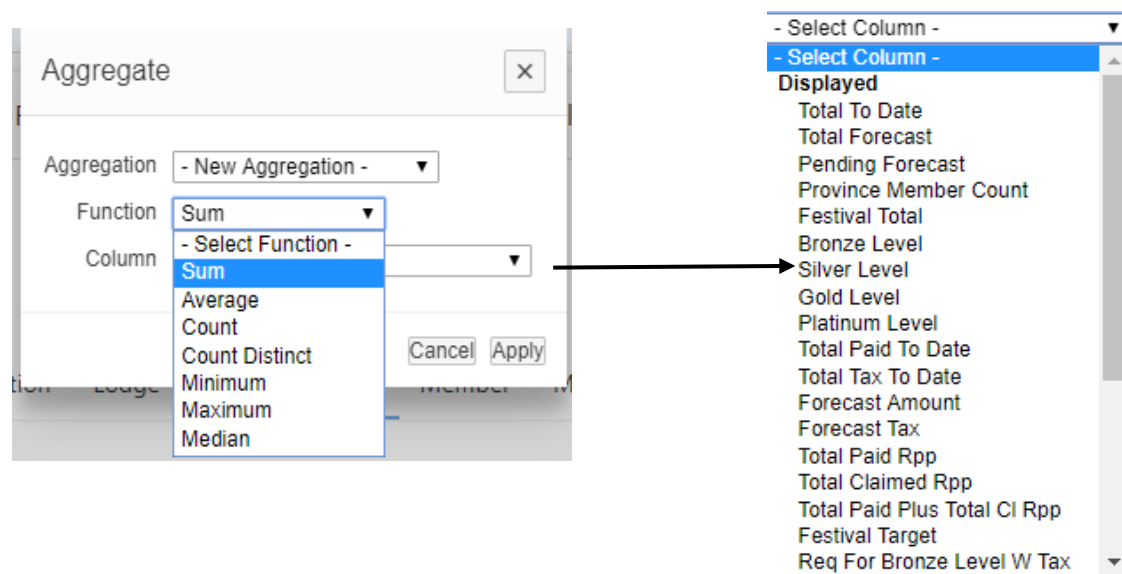
	Column	Status
1	Lodge Chapter No	Enabled
2	- Select Column -	Enabled
3	- Select Column -	Enabled
4	Displayed	Enabled
5	Lodge Chapter No	Enabled
6	Total To Date	Enabled
	Total Forecast	Enabled
	Pending Forecast	Enabled
	Lodge Name	Enabled
	Centre	Enabled
	Town	Enabled
	Province Member Count	Enabled
	Festival Total	Enabled
	Bronze Level	Enabled

Actions → Format → Highlight

Allows you to add multiple highlighting at row or single cell level, i.e. you may want to highlight a row in red where a donor has donated more than £1000. You can highlight the background, foreground or both

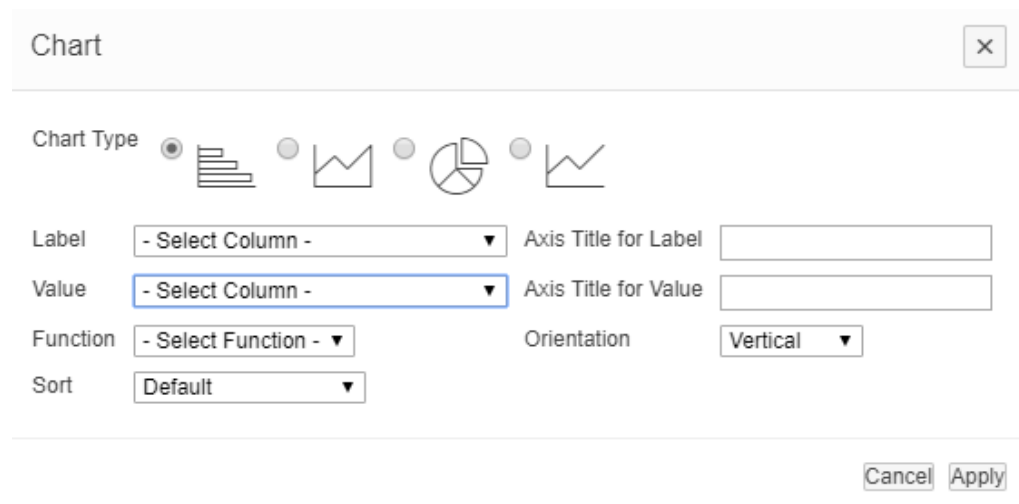
Actions → Format → Aggregate

Allows you to perform maths functions on number columns, mainly used to calculate subtotals and counts.



Actions → Format → Chart

Allows you to generate a range of charts based on the reporting data.



Actions → Format → Group by

Allows you to add multiple columns to group your data by whilst performing a maths function on a number column. Typically, this is used to provide totals and counts for a given column value, i.e. if you wanted to know how much money had been donated by Lodges that had gained an honorific then you can group by honorific and sum the total to date.


Group By
×

1 Honorific Achieved
2 - Select Group By Column -
[Add Group By Column](#)

Functions	Column	Label	Format Mask	Sum
1 Sum	Total To Date		999G999G999G999G990	<input type="checkbox"/>
2 - Select Function -	- Select Column -			<input type="checkbox"/>

[Add Function](#)

Cancel Delete Apply



Honorific Achieved	Sum Total To Date
BRONZE	8,920
-	216,487
GOLD	2,375

Actions → Format → Pivot

Includes multiple options to create pivot tables enabling you to report on trends in your data

Pivot
×

Pivot Columns
1 - Select Pivot Column -
[Add Pivot Column](#)

Row Columns
1 - Select Row Column -
[Add Row Column](#)

Functions	Column	Label	Format Mask	Sum
1 - Select Function -	- Select Column -			<input type="checkbox"/>

[Add Function](#)

Cancel Apply

Actions → Flashback

Oracle stores any data changes in an internal flashback table that by default is purged after 3 hours. This then allows you to step back in time to view your data as it was before changes were made.

Flashback
×

A flashback query allows you to view the data as it existed at a previous point in time.

As of minutes ago.

Cancel Apply

Actions → Save Report

Allows you to save your customised report options as a named report. This named report can then be selected from a list. Here we are saving a report called Lodges in Cambridge.

Save Report
×

Save
(Only displayed for developers)

Name

Description

Cancel Apply

The saved report can now be accessed as below

1. Primary Report
⬆

Default
1. Primary Report
Private
1. Lodges in Cambridge

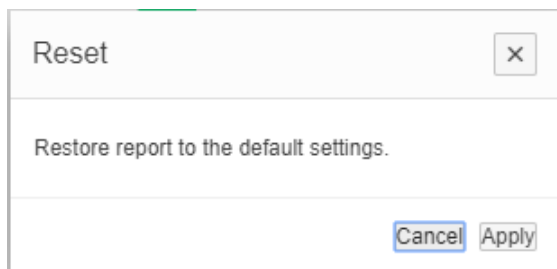
Rows

Actions
⬇

The Primary Report now represents the base report - as developed with no additional customisations. You are now able to easily switch between your customised reports and return to the primary one. As previously mentioned, saved reports are stored against your user account and as such remain private to you.

Actions → Reset

Removes any unsaved customisations from the report on view, this applies to any report whether it be the Primary report or a saved report.

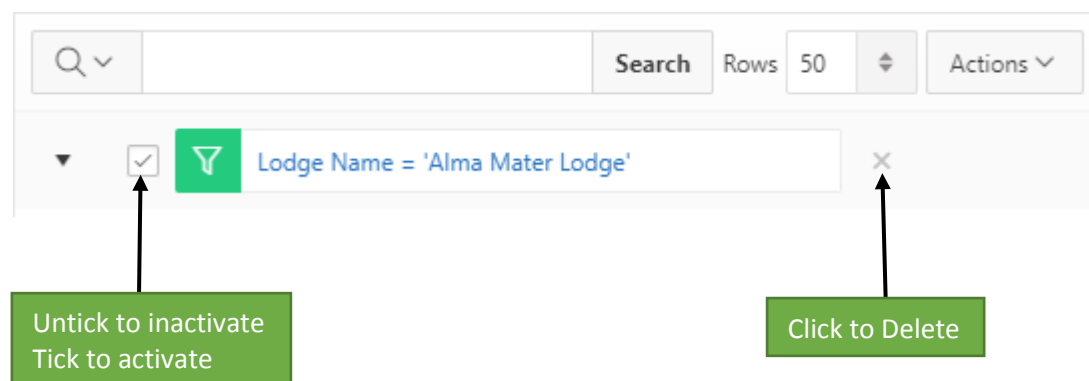


Actions → Help

Provide more help for interactive reports.

Selected Report Customisation Options

Whenever a report is customised, the customisation options used are displayed on screen below the search bar. This not only allows you see the report parameters at-a-glance but it also enables you to inactivate/activate or delete the option(s) selected, see below.



Sharing Customised Reports (Report Administrators Only)

Once you have saved your customisations, they can be shared with any other user within your province as well as with the Relief Chest staff (this is particularly useful for troubleshooting purposes). See below.

Main Festival Report for FEST2023 (Cambridgeshire Festival 2023) as at 30-APR-2019. Report Crystallised on: 02-MAY-2019

Refresh
Share a Report

Share My Report With Another User (External)

Share with User

Report Type To Share

Saved Report To Share

Share

Search Dialog

Search

%

David CAMERON (FEST2023)

Dilhani JAYASINGHE

Elizabeth OXENHAM

Justin Alexander James CURTIS (FEST2023)

Karen DYE

Mark SHIELDS (FEST2023)

Paul GILLINGWATER (FEST2023)

Ross PILLER

Row(s) 1 - 8

Festival Reporting User Guide

Report Type To Share

Honorifics for a Chapter
Honorifics for a Lodge
Honorifics for a Member
IR Area Centre
IR Contract Type Summary
IR DD Forecast End Date
IR Festival Summary
IR Lodge
IR Lodge Grouping Summary
IR Lodge Summary
IR Lodge Targets
IR Lodge groups
IR Member
IR Member Summary
IR Notes
IR Prov Lodge Stats
IR Real-time Reporting
IR Towns Groups
IR UGLE Lodge Stats

Saved Report To Share

E0154 - Base Report
Test Report

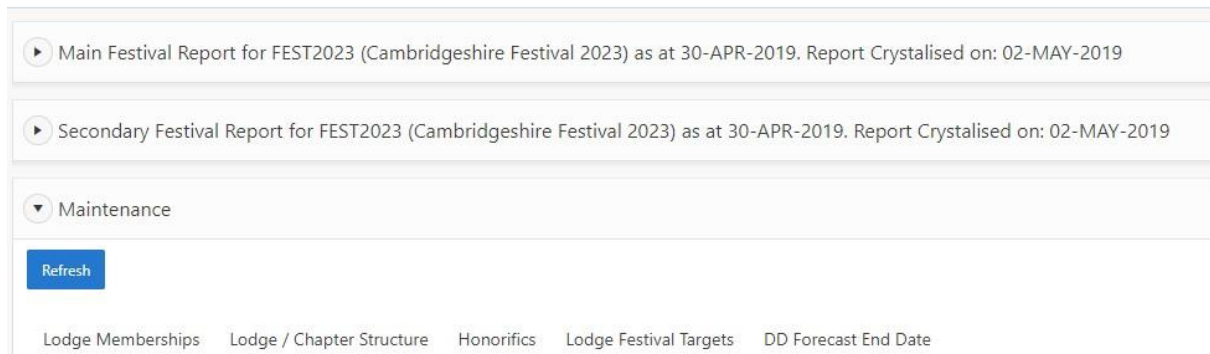
In summary – select the user you want to share a report with, select the report type (this is the location of the report), finally select the actual report name (as previously saved) and press Share.

The selected user will now have access to the report as below:

Q	Search	1. Test Report	Rows 50	Actions
▼	Saved Report = "Test Report"	Default		
		1. Primary Report		
		Private		
		1. Test Report		
		Public		
		1. Donations to Date		
		2. E0154 - Base Report		

Maintenance (Data Administrators Only)

The maintenance area of the Festival Reporting Page is located immediately below the Festival Report area. The easiest way to access this is to collapse the Festival Report areas by clicking the triangles as below.

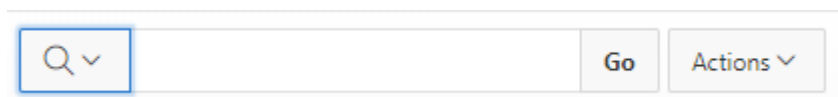


The Maintenance area consists of the following tabs

- Lodge Memberships
 - UGLE Lodge Membership Stats
 - FEST2023 Lodge Membership Stats
- Lodge / Chapter Structure
 - Lodge / Chapter Town or Group Maintenance
 - Lodge / Chapter Area or Centre Maintenance
 - Lodge / Chapter Group Assignments
- Honorifics
 - Honorifics for a Lodge
 - Honorifics for a Chapter
 - Honorifics for a Member
- Lodge Festival Targets
- DD Forecast End Date

Viewing Amendments

After making a change to your Festival data you need to refresh the tab to view the amendment, to do this click in the search bar of the tab in question and press return.



UGLE Lodge Membership Stats

Strictly speaking, there is no data in this tab for a festival to maintain, however it has been included here so that you can view the membership stats, according to UGLE, in real time (the data is updated overnight to take into account joiners and leavers). The data gives you an opening membership balance for the period in question and a closing membership balance for the same period, it also includes the Lodge status.

<div> <input type="text"/> <input type="button" value="Search"/> Rows 50 <div> <input type="button" value="Actions"/> </div> </div>							
1 - 44 of 44							
Province	Start Date	End Date	Lodge / Chapter Number	Lodge / Chapter Name	Memberships at Start Date	Memberships at End Date	Lodge / Chapter Status
Cambs.	01-JAN-2019	31-JAN-2019	C2107	Saint Etheldreda	44	44	Normal
Cambs.	01-JAN-2019	31-JAN-2019	C2727	Caldwell	61	63	Normal
Cambs.	01-JAN-2019	31-JAN-2019	C3201	St Wendreda	48	50	Normal
Cambs.	01-JAN-2019	31-JAN-2019	C3532	Cantabrigia	42	42	Normal
Cambs.	01-JAN-2019	31-JAN-2019	C4087	St Andrew	44	44	Normal

Festival Lodge Membership Stats

Some festivals calculate their Lodge honorifics as a multiple of the honorific level and the membership count – in order to do this Festival Lodge membership stats must be created, this can be done at any time and will take immediate effect. Once created they can be easily adjusted or deleted. Below you can see that Festival Lodge stats have been created for FEST2023.

<div> UGLE Lodge Membership Stats FEST2023 Lodge Membership Stats Lodge / Chapter Town or Group Maintenance Lodge / Chapter Area or Centre Main </div>						
FEST2023 Lodge Membership Stats						
<div> <input type="text"/> <input type="button" value="Search"/> Rows 50 <div> <input type="button" value="Actions"/> </div> </div>						
1 - 44 of 44						
	Province	Lodge No ↑	Lodge Name	Province Member Count	Ugle Member Count	Ugle Member Count As At
	Cambs.	C0088	Chapter of Pythagoras	72	67	31-JAN-2019
	Cambs.	C0441	Chapter of Fidelity	69	65	31-JAN-2019
	Cambs.	C0809	Etheldreda Chapter	63	61	31-JAN-2019
	Cambs.	C0859	Euclid Chapter	65	65	31-JAN-2019

Creating Festival Lodge Membership Stats

To create a set of stats simply press the button below.

Create / Refresh Lodge Memberships

As the name suggests this is a dual-purpose button, if you do not have any Festival Lodge membership stats then pressing the button will create a complete set of stats for you. All of the Lodges and Chapters within your province will be created using the UGLE stats as a starting point.

Pressing the button when you already have a set of stats will add any newly consecrated Lodges and Chapters from within your province to the list. If you prefer you can manually add Lodges and Chapters by pressing the button below – this may be because not all Lodges and Chapters are required to have an entry or if you want to create an entry for other orders, other units or lodges / Chapters that are not in your province.

Add A Lodge / Chapter Record

Add A Lodge

Add a Lodge for FEST2023

Lodge Number *

Lodge Name *

Lodge Member Count *

Exit

Save

Simply complete all the fields and press Save (a red asterisk denotes a mandatory field). The application prevents you from creating duplicate entries as below

1 error has occurred

ORA-20000: A lodge record for C0088 already exists

Add a Lodge for FEST2023

Lodge Number *

Lodge Name *

Lodge Member Count *

c0088


test

98

Note the validation is case insensitive – C0088 is the same as c0088

Editing /Deleting an Existing Lodge Entry

Having set-up your Festival Lodge Stats they can be individually amended by clicking the pencil symbol next to the entry in question, see below

	Cambs.	C0088	Chapter of Pythagoras	72	67
---	--------	-------	-----------------------	----	----

↓

Edit Lodge Entry C0088 for FEST2023 ×

Province ^{*} Cambs.

Lodge Name Chapter of Pythagoras

Province Member Count 72

Notes

Delete Cancel

Save

You can amend the name, Province Member count, add any notes or delete the entry altogether. Deleting requires a confirmation as below.

×

Would you like to perform this delete action?

Cancel

OK

Lodge / Chapter Town or Group Maintenance

If your province has towns or groups that individual Lodges and Chapters belong to and you want to report on this then the Provincial structure must be entered. Once entered the Lodges and Chapters can be assigned to the Town or group. Below you can see some Towns for FEST2023.

UGLE Lodge Membership Stats	FEST2023 Lodge Membership Stats	Lodge / Chapter Town or Group Maintenance	Lodge / Chapter Area or Centre Maintenance	Lodge / Chapter (
Lodge / Chapter Town or Group Maintenance				
<div> <input type="text"/> <input type="button" value="Search"/> Rows 50 <input type="button" value="Actions"/> <input type="button" value="Add A Town / Group"/> </div>				
1 - 8 of 8				
	Town / Group	Default Area / Centre	Active	
	Cambridge	-	Yes	
	Chatteris	-	Yes	
	Ely	-	Yes	

Adding a Town or Group

To add a Town or group press the button below and complete the fields in the form, again the application prevents you from creating duplicates.

Add A Town / Group

Add A Town Or Group For

FEST2023

Town / Group *

Default Area / Centre

Notes

You can set your towns and groups to have a default area or centre – will we discuss setting you Areas and Centres in the next section – simply select the value from the list before saving. With the Towns or Groups created they can be used in the Lodge Chapter assignment tab, if the Town or Group has a default Area / Centre it will be used in the assignment process but can be overridden.

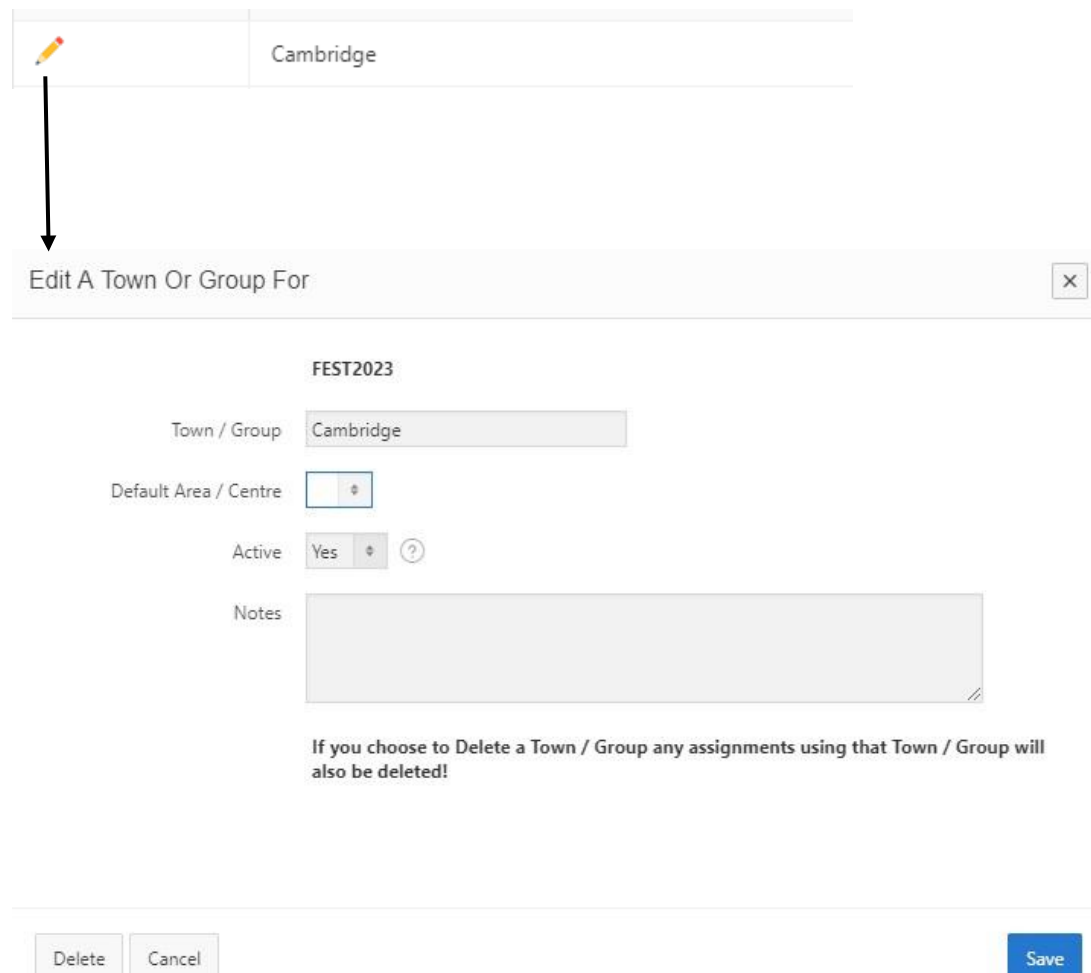
The question mark next to the Default Area / Centre field shows additional help for the item as below

Default Area / Centre

This will be the default when a Lodge / Chapter is assigned to this Town / Group

Editing a Town or Group

You can amend the Town or Group name, the default Area/Centre, set the active status, add any notes or delete the entry altogether



The screenshot shows a table with one row containing a pencil icon and the text 'Cambridge'. An arrow points from the pencil icon to a modal dialog box titled 'Edit A Town Or Group For'. The dialog box contains the following fields:

- FEST2023** (header)
- Town / Group**: Text input field containing 'Cambridge'.
- Default Area / Centre**: Dropdown menu with a blue arrow icon.
- Active**: Radio button labeled 'Yes' with a question mark icon.
- Notes**: Text area for adding notes.

Below the fields, a warning message reads: 'If you choose to Delete a Town / Group any assignments using that Town / Group will also be deleted!'. At the bottom of the dialog are three buttons: 'Delete', 'Cancel', and 'Save'.

Inactivate a Town or Group

Change Active from Yes to No to inactivate the town or group, this simply means it will no longer be available for any future assignments, any previous assignments using the town or group will remain untouched.

Delete a Town or Group





Press the Delete button to delete a Town or group altogether (confirmation required) – if the town or group had been used for an assignment then that assignment record will also be deleted!

Lodge / Chapter Area or Centre Maintenance

If you need to further sub divide your Lodge / Chapter assignments you can add an Area or Centre. Once entered the Lodges and Chapters can be assigned to the Area or Centre. Below you can see some Areas for FEST2023.

UGLE Lodge Membership Stats FEST2023 Lodge Membership Stats Lodge / Chapter Town or Group Maintenance Lodge / Chapter Area or Centre Maintenance Lodge

Lodge / Chapter Area or Centre Maintenance

Q ▾	Search	Rows	50	⬆ ⬇ ⬆	Actions ▾	Add An Area / Centre
1 - 8 of 8						
	Area / Centre	Active	Notes			
	1	Yes	-			
	2	Yes	-			
	3	Yes	-			
	4	Yes	-			

Adding an Area or Centre

To add an Area or Centre press the button below and complete the fields in the form, again the application prevents you from creating duplicates.

Add An Area / Centre

Add An Area / Centre ✕

FEST2023


Area / Centre

Notes

Cancel Save

Editing an Area or Centre

You can amend the Area or Centre, set the active status, add any notes or delete the entry altogether.

	Area / Centre
	1

↓

Edit An Area / Centre For ×

FEST2023

Area / Centre:

Active: ☒ Yes ☐ No

Notes:

If you choose to Delete an Area / Centre any assignments using that Area / Centre will be updated to remove the assignment - The Town / Group entry will remain

Delete

Cancel

Save

Inactivate an Area or Centre

Change Active from Yes to No to inactivate the area or centre, this simply means it will no longer be available for any future assignments, any previous assignments using the area or centre will remain untouched.

Delete an Area or Centre

Press the Delete button to delete an area or centre altogether (confirmation required) – if the area or centre had been used for an assignment then that assignment record will be amended to remove the assignment the town or centre assignment will remain.

Lodge / Chapter Group Assignments

Having previously set up the province structure, the Lodge / Chapter assignments can be made, below you can see some assignments for FEST2023.

UGLE Lodge Membership Stats FEST2023 Lodge Membership Stats Lodge / Chapter Town or Group Maintenance Lodge / Chapter Area or Centre Maintenance Lodge / Chapter Group Assignments

Lodge / Chapter Group Assignments

Q Search Rows 50 Actions

Add A Lodge Group Assignment

1 - 50 of 55

	Lodge / Chapter Number	Lodge / Chapter Name	Town / Group	Area / Centre	Notes
	C0003	University Chapter	Cambridge	1	-
	C0088	Chapter of Pythagoras	Cambridge	1	-
	C0112	Cambridgia Chapter	Cambridge	1	-
	C0441	Chapter of Fidelity	Cambridge	1	-
	C0660	Hereward Chapter	March	5	-

Assigning a Lodge or Chapter to a Town or Group

Press the button below and complete the fields on the form. The Lodge/Chapter is selected from a searchable list of values (see next page). The Town/Group and Area/Centre values are selected from a select list (see next page).

Add A Lodge Group Assignment

Add A Lodge Group Assignment For



FEST2023

Lodge No *

Town / Group *

Area / Centre

Notes

Lodge No (Searchable List of Values)

The field contains the Lodges and Chapters in the province, press up arrow indicator, click on a lodge / Chapter entry or type in a Lodge / Chapter number in the search dialog to select a Lodge / Chapter.

Lodge No *

↑

Search Dialog ×

Search

%

C0384 - Star of Gwynedd (Normal)

C0597 - St Cybi (Normal)

C0606 - Segontium (Normal)

C0755 - Gogarth (Normal)

C0998 - Welchpool (Normal)

C1143 - Royal Denbigh (Normal)

C1336 - Sir Watkin (Normal)

C1477 - Mold (Normal)

C1488 - St Eleth (Normal)

C1509 - Eryri (Normal)

C1583 - Corbet (Normal)

Town / Group (Select List) – Select a Town, if the town has a default Area / Centre it will be selected for you in the Area / Centre filed, however this can be changed.

Town / Group *

→

Town / Group

Area / Centre

Notes

Cambridge

Chatteris

Ely

March

Newmarket

UNALLOCATED

Whittlesey

Wisbech

Area / Centre (Select List)

Area / Centre

→

Area / Centre

Notes

1

2

3

4

5


6


7

8

Edit / Deleting a Lodge / Chapter Group Assignment

You can amend the assignment by changing the Town / Group value, the Area/Centre value, add any notes or delete the entry altogether.

	Lodge / Chapter Number	Lodge / Chapter Name
	C0003	University Chapter



Edit A Lodge Group Assignment For
 ✕

FEST2023

Lodge / Chapter Number C0003

Lodge / Chapter Name * University Chapter

Town / Group * Cambridge

Area / Centre 1

Notes

Delete Cancel

Save

Honorifics Maintenance

Lodge/Chapter and member honorifics are created and maintained in the same way through their dedicated tabs. The honorifics can be created and amended at any time with the results calculated in real-time in the reporting data tabs that use this data. This allows you to see the effect of the saved honorific values. Below you can see the current honorific values for FEST2023.

[UGLE Lodge Membership Stats](#)
[FEST2023 Lodge Membership Stats](#)
[Lodge / Chapter Town or Group Maintenance](#)
[Lodge / Chapter Area or Centre Maintenance](#)
[Lodge / Chapter Group Assignments](#)
[Honorifics Maintenance](#)

Honorifics Maintenance

[Lodge](#)
[Chapter](#)
[Member](#)

Lodge

Honorifics Maintenance					
Lodge Chapter Member					
<input type="text"/> <input type="button" value="Go"/> <input type="button" value="Actions"/>					
	Honorific	Hon Level $\downarrow \uparrow$	Multiply Level By Member Count	Multiplier Source	Include Tax
	PLATINUM	750	Yes	MEMBER	Yes
	GOLD	500	Yes	MEMBER	Yes
	SILVER	450	Yes	MEMBER	Yes
	BRONZE	300	Yes	MEMBER	Yes

Chapter

Lodge Chapter Member					
<input type="text"/> <input type="button" value="Go"/> <input type="button" value="Actions"/>					
	Honorific	Hon Level	Multiply Level By Member Count	Multiplier Source	Include Tax
	PLATINUM	5000	No	UNIT	Yes
	GOLD	2500	No	UNIT	Yes
	SILVER	1500	No	UNIT	Yes
	BRONZE	750	No	UNIT	Yes

Member

Lodge Chapter Member			
<input type="text"/> <input type="button" value="Go"/> <input type="button" value="Actions"/>			
	Honorific	Hon Level	Include Tax
	GRAND PATRON	1500	Yes
	PATRON	1000	Yes
	VICE PATRON	750	Yes
	STEWARD	400	Yes

Creating Lodge / Chapter Honorifics

To create an honorific press the button and complete the fields in the form below. The Create Honorifics button is displayed in each of the Honorific tabs whilst there are honorifics still to be created. Once they have all been created the button is no longer visible.

The honorific select list contains a list of the honorifics that can be used, the list will automatically exclude honorifics that have already been used thus ensuring duplicates cannot be created.

The Multiply Level By Member Count field ensures the honorific level is dynamic and will result in tailored honorific levels for each Lodge depending on the previously entered Festival Lodge Membership stats.

The Include Tax field instructs the application to include or exclude Gift Aid tax reclaims when calculating honorific holders.

Create Honorifics

Add A Lodge Honorific For ×

FEST2028

Honorific *

Hon Level £ *

Multiply Level By Member Count?

Include Tax *

Notes

Honorific *

BRONZE
SILVER
GOLD
PLATINUM

Below Bronze and Silver honorific Levels have already been created, therefore they have been excluded from the select list

Honorific *

GOLD
PLATINUM

Page 35 of 42

Editing Lodge / Chapter Honorifics

You can amend Lodge and Chapter honorifics by pressing the pencil next to the honorific in question and editing the form below.

Lodge
Chapter
Member

	Honorific	Hon Level ↓	Multiply Level By Member Count
	SILVER	1000	No

Edit A Lodge Honorific For

FEST2028

Honorific
SILVER

Hon Level £

Multiply Level By Member Count?

Includes Tax

Notes

Created By
TOATES
Created Date
25-FEB-2019

To delete the honorific press the delete button (a confirmation message will be displayed). This will remove any calculated honorifics.

Creating a Member Honorific

To create a member honorific press the button and complete the form below.

The Include Tax field instructs the application to include or exclude Gift Aid tax reclaims when calculating honorific holders.

Create Honorifics

Add A Member Honorific For

FEST2028

Honorific*

Hon Level £*

Include Tax*

Notes

STEWARD

VICE PATRON

PATRON

GRAND PATRON

Editing Member Honorifics

You can amend a member honorific by pressing the pencil next to the honorific in question and editing the form below.

Lodge
Chapter
Member

Q

Go

Actions

	Honorific	Hon Level	Include Tax
	STEWARD	450	Yes

Edit A Member Honorific For

FEST2028

Honorific STEWARD

Hon Level* 450

Include Tax* Yes

Notes

Delete

Cancel

Save

To delete the honorific press the delete button (a confirmation message will be displayed). This will remove any calculated honorifics.

Creating Lodge Festival Targets

Lodge Festival Targets
DD Forecast End Date

Create / Refresh Lodge Festival Targets

Add A Lodge / Chapter Record

To create a set of targets simply press the button below.

Create / Refresh Lodge Memberships

As the name suggests this is a dual-purpose button, if you do not have any Festival Lodge targets then pressing the button will create a complete set of Lodges / Chapters for you. All of the Lodges and Chapters within your province will be created using the UGLE data.

Pressing the button when you already have a set of targets will add any newly consecrated Lodges and Chapters from within your province to the list. If you prefer you can manually add Lodges and Chapters by pressing the button below – this may be because not all Lodges and Chapters are required to have an entry or if you want to create an entry for other orders, other units or lodges / Chapters that are not in your province.

Add A Lodge / Chapter Record

Add a Lodge For Festival Target
×

Add a Lodge for FEST2023

Lodge Number *

Lodge Name *

Lodge Target *

Exit

Save

Simply complete all the fields and press Save (a red asterisk denotes a mandatory field). The application prevents you from creating duplicate entries. See below:

Add a Lodge For Festival Target

1 error has occurred

ORA-20000: A lodge record for C3532 already exists

Add a Lodge for FEST2023

Lodge Number *
c3532

Lodge Name *
test


Lodge Target *
1000

Exit
Save

Note the validation is case insensitive – C3532 is the same as c3532

Editing /Deleting an Existing Lodge Entry

Having set-up your Festival Lodge targets they can be individually amended by clicking the pencil symbol next to the entry in question, see below

	Lodge / Chapter Number	Lodge Name	Lodge Festival Target
	C3532	Test	10000

Edit Lodge Entry For Lodge Festival Target

Lodge / Chapter Name *
Test

Festival Target £ *
10000

Notes

Delete
Cancel
Save

You can amend the name, the target amount, add any notes or delete the entry altogether. Deleting requires a confirmation as below.

✕

Would you like to perform this delete action?

Cancel
OK

DD Forecast End Date

The DD Forecast End Date is the maximum date up to which Direct Debit forecasts are made to. For instance if a direct Debit has been set-up as indefinite then the forecast for that DDI will be up to the DD End date as specified. The DD Forecast End date is defaulted to the Festival End date plus one month.

The DD Forecast End Date can be modified by clicking the pencil and selecting or entering a new date, as below.

DD Forecast End Date

Go
Actions ▾

	Chest Code	Direct Debit Forecast End Date	Modified By
✎	FEST2023	11-JAN-2024	-

Edit Direct Debit Forecast End Date
✕

DD Forecast End Date *

11-JAN-2024

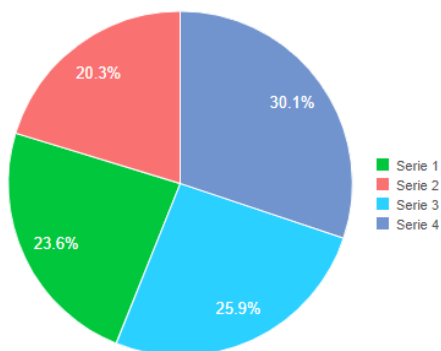
📅

Visualisation

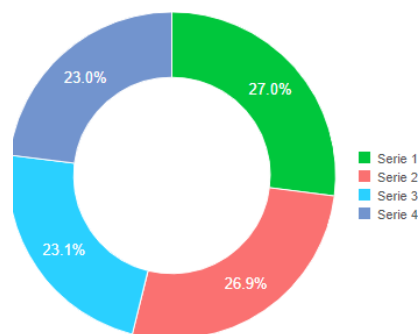
A number of visualisation or charting objects are available in the APEX builder, more than are available to end-users. The current list is below with some examples.

Bar
Area
Bar
Box Plot
Bubble
Combination
Dial Gauge
Donut
Funnel
Gantt
Line
Line with Area
Pie
Polar
Pyramid
Radar
Range
Scatter
Stock

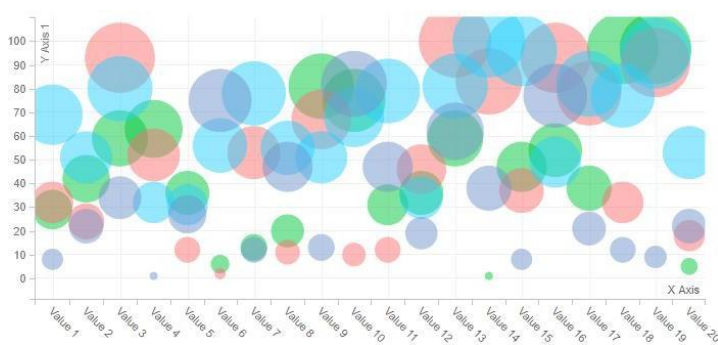
Pie Chart



Donut



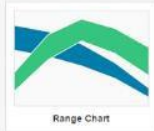
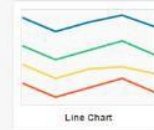
Bubble



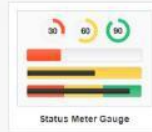
Festival Reporting User Guide

Data Visualizations

Charts



Gauges



Others

