# SAMIS II

# **ROLLS MANAGEMENT, REPORTS, & CHARTS**



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## OVERVIEW

SAMIS stands for The Salvation Army Management Information System. It is a software program that stores statistical data and provides various reports based on this data. The program is designed from a Chart of Statistics and is the mandated collection tool for statistics in the Canada and Bermuda Territory for all Ministry Units.

SAMIS is not only a repository for the Territory's statistical data, it will, over time, be a mine of information useful not only in charting the levels and extent of Salvation Army activity but also essential in successful planning for the future.

## LOGGING ON

The SAMIS System access is available through saDashboard at <u>http://www.sallynet.ca</u> for the Canada and Bermuda Territory. Log onto saDashboard.

- 1. Click **SAMIS** from program ribbon in left pane.
- 2. Type your Username.
- 3. Type your password.
- 4. Click Log In.

#### saDashboard

Canada & Bermuda Territory



## **MEMBERSHIP ROLLS**

All regular members in attendance to the church should be included in the rolls membership in one of these categories. It is expected that membership rolls will be updated on a monthly basis. This enables the reports to be more accurate at all levels of the organization.

## **CATEGORIES OF MEMBERSHIP**

There are five categories of rolls membership within The Salvation Army.



## **FLOW OF MEMBERSHIP**

This chart outlines the regular flow of membership across the membership rolls.



## **FRIENDS ROLL**

This chart outlines the possible flow of members into the Friends Roll. Please notice the exception as these are not standard movement throughout the rolls.



# SENIOR RECRUITS ROLL

This chart outlines the possible flow of members into the Senior Recruits Roll.



# JUNIOR SOLDIER ROLL

This chart outlines the possible flow of members into the Junior Soldier Roll.



# SENIOR SOLDIER ROLL

This chart outlines the possible flow of members into the Senior Soldier Roll.



# ADHERENTS ROLL

This chart outlines the possible flow of members into the Senior Soldier Roll.



## **UPDATE ROLLS**

In SAMIS 4.0 you enter the roll statistics in the category in which you want to add members and choose the category in which the roll is coming from.

## **ENTER ROLLS**

1. Click Action, Update Rolls.



2. Click Select to display the grid to enter statistics.

Program Activity	<u>Members End of</u> Last Month	<u>Members Now on</u> <u>Roll</u>	<u>Stat</u> Entered?	Enter/Edit Statistics
Adherents Roll	117	117		Select
Friends Roll	140	140		Select
Recruits Roll - SR	2	3	$\checkmark$	Select
Junior Soldiers Roll	50	49		Select
Senior Soldiers Roll	234	234		Select

- 3. Enter statistics into the desired membership roll category.
- 4. Click Save.



5. As soon as you save the statistics you will see the change in the table displayed.

Program Activity	<u>Members End of</u> Last Month	Members Now or <u>Roll</u>		Enter/Edit Statistics
Adherents Roll	117	117		Select
Friends Roll	140	140		Select
Recruits Roll - SR	2	3	Members now	Select
Junio Members at the end	50	49	on roll	Select
of last month	234	234 N	otice an increas	e <u>Select</u>
			of one	

## SAMIS II – Rolls Management, Reports, & Charts

Program Activity	<u>Members End of</u> Last Month	<u>Members Now on</u> <u>Roll</u>	<u>Stat</u> Entered?	Enter/Edit Statistics
Adherents Roll	117	117		Select
Friends Roll	140	140		<u>Select</u>
Recruits Roll - SR	2	3	$\checkmark$	Select
Junior Soldiers Roll	50	49 🦯	Members no on roll	ow Select
Senic Members at the er of last month	234	234 N	otice a decrea	ase

Changes for Active Month: Details of changes for month							
Activity Detail	Adherants Friends Sr. Recruits Jr. Soldier Sr. Soldier						
Add - from Adherents Roll							
Add - from Friends Roll							
Add - from Senior Recruits Roll							
Add - from Junior Soldiers Roll	<b>5</b> 1						
Add - from Senior Soldiers Roll							
Add - from another Corps							
Add - Other	Details of changes for month						
Add - Reinstated	Details of changes for month Additions are shown in blue						
Remove - to Adherents Roll							
Remove - to Adherents Roll Remove - to Friends Roll							
Remove - to Senior Recruits Roll	<b>5</b>						
Remove - to Junior Soldiers Roll							
Remove - to Senior Soldiers Roll							
Remove - to Another Corps	Details of changes for month						
Remove - Other	Removals are shown in red						
Remove - PTG/Deceased							
Enrolled							

## **EDIT ROLLS**

Roll Changes for month of **November 2012** displayed below. To reverse any of the changes, you have to go into the month the statistics were added. Then **reverse** by using **negative number** in same field as statistic added **originally**. In the example below, we are going to reverse changes made to Sr. Soldier roll.



The outcome of the changes above are reflected in the total members now on roll.



We are going to reverse one of the two we added to Sr. Soldiers from Adherents.

Enter Roll Changes for: Senior Soldiers Roll



## SAMIS II – Rolls Management, Reports, & Charts

All Changes, for All Rolls, in Select	ed Month:	Cha	nged statis	tics			
Activity Detail	Adhera		Friends	Sr. Recruits	Jr. Soldier	Sr. Soldier	Now 1 added to
Add - from Adherents Roll	$\uparrow$					7 1	Sr. Soldiers
Add - from Friends Roll							from Adherents
Add - from Senior Recruits Roll							
Add - from Junior Soldiers Roll						1	
Add - from Senior Soldiers Roll							
Add - from another Corps						1	
Add - Other						1	
Add - Reinstated						1	
Remove - to Adherents Roll							
Remove - to Friends Roll							
Remove - to Senior Recruits Roll		/					
Remove - to Junior Soldiers Roll							
Remove - to Senior Soldiers Roll					1		
Remove - to Another Corps							
Remove - Other							
Remove - FTG/Deceased	moved from dherents					2	
	unerents						
Enrolled						3	

The totals for the month change also to reflect the changes we made above.

## REPORTS

SAMIS contains numerous reports that may be used for a variety of reasons. Most of the reports are generated in pdf format so Adobe Reader is required to view the reports. However, a couple of the reports can be created in Microsoft Excel or Microsoft Word format.

## **CREATE REPORTS**

#### 1. Click Reports, Create Reports.



#### 2. Select desired report in the list to create the report.

Report Type	Report Name	Select Report
MU	Corps Membership Collection Form	Select Click Select
MU	Corps Ministries Health Summary	Select
MU	Detailed Average Attendance Report	Select
MU	Detailed Total Attendence Report	Select
MU	First time Seekers Report	Select
MU	Growth History - Overview	Select
MU	Statistics Detail Report	Select
MU	Women's Ministry Report	Select

#### 3. Report parameters are displayed on the right of the window.



4. Confirmation that the report was submitted is displayed at top of window.

Submitted the following Request(s): • Corps Membership Collection Form		Success message	
---	--	-----------------	--

## **VIEW CREATED REPORTS**

Viewing the report will be determined by the format of the report.

1. Click View Reports tab.

Area Division Stat	istics Readiness Finance Territory Master View Reports	View Repo
	MINISTRY UNIT REPORT - OPTIONS	
Select Dates Period Start: Period End:	2012 September September	
Closed Locations?	Scude Closed Locations     Include Closed Locations	
Select Division: Select Location:	Ontario Great Lakes Division V Cambridge Citadel V	
	Submit Clear	
Co	mpleted Reports can be found in View Reports Tab.	

2. Click on report link to open the report.

View Submitted Reports							
		Ret	iresh (Last C	Enable Timer Disable Timer			
Rep. No	Order Date	Completed Date	Status	Report Link	User Report Name	Delete Report	
3040	10/14/2012 10:52:38 AM	10/14/2012 10:52:45 AM	Completed	Corps Membership Collection Form	lin_greenham_fs_Corps Membership Collection Form_2	<u>Delete</u>	
Report link							
	Previously Submitted Reports are available here. Reports are enailable for 5 days. Citic on a Report to Open.						

- 3. Report opens in Adobe Reader, Microsoft Word, or Microsoft Excel format, depending upon what you have requested.
- 4. Place your mouse towards the bottom of the report to activate tool bar for Adobe Reader.



## **PRINT REPORTS**

The report must be displayed on the screen to print the report.

#### PRINT REPORT IN ACROBAT READER

1. Click Print.



- 2. Choose a printer for the report if you have more than one printer installed.
- 3. Click **Print**.



## PRINT REPORT IN MICROSOFT EXCEL OR WORD

1. Click File, Print.



- 2. Choose a printer for the report if you have more than one printer installed.
- 3. Click Print.

Print	
Printer: HP Officejet Pro 8500 A910   Properties Advar	iced Help 🕖
Copies: 1	
Pages to Print	Comments & Forms
• All	Document and Markups
🗇 Current page	
© Pages 1-2	
More Opti Click drop-down to choose	printer
Page Sizing & manuning	
Size Poster 😨 Multiple 🕋 Booklet	
Size Options:	
Fit	
C Actual size	
Shrink oversized pages	
Choose paper source by PDF page size	
Print on both sides of paper	
Orientation: Auto portrait/landscape	
Portrait	
C Landscape	
Want to print colors as gray & black?	
	Page 1 of 2
Page Setup	Print

## SAVE REPORTS

The reports may be one of three formats. The procedure for saving the report will depend upon the format that you run it in. Reports must be displayed on screen to be able to save the report.

#### SAVE REPORT IN ACROBAT READER

1. Click Save.



- 2. Choose the location to save the file.
- 3. Type a name for the report.
- 4. Click Save.



## SAVE REPORT IN MICROSOFT EXCEL OR WORD

- 1. Click Report link to open the report.
- 2. Click Save or Save as.



## **CHECK FOR UPDATED REPORTS**

If the report has not completed processing, you can check to update completion of report. The report is ready to open when the Report Link is underlined.



- 1. Click **Refresh** to check immediately for report completion update.
- 2. Click Enable Timer to check for report completion update every minute.

Re	efresh	Re	ifresh E	IBMITTED REPORT Inable Timer Disable Timer Scked st: 11:12:27 AM)	ble Timer	
						Delete Report
3040 S	iteratus of re	10142012 10:52:45 AM	Completed	Cores Membership Collection Form	lin_greenham_fs_Corps Membership Collection Form_2	Delete
			Reports ar	ted Reports are available here. re available for 5 days. n a Report to Open.		

- 3. When timer is enabled the last time the report was refreshed for updates is displayed.
- 4. Click **Disable Timer** when the report has been updated.

Refresh	Enable Timer	Disable Timer		Disable Timer	
(La	ast Checked at: 12:54:	47 PM)	st time re	port status was u	pdated

## **DELETE REPORTS**

Reports remain on the View Reports page for 5 days unless it is deleted.

1. Click **Delete**.

			VIEW SU	UBMITTED REPORTS		
		Ref		Enable Timer Disable Timer		
Rep. No	Order Date	Completed Date	Status	Report Link	User Report Name	Delete Report
3040	10/14/2012 10:52:38 AM	10/14/2012 10:52:45 AM	Completed	Corps Membership Collection Form	lin_greenham_fs_Corps Membership Collection Form_2	Delete
					Delete	
			Reports a	tted Reports are available here. are available for 5 days. on a Report to Open.	Re	ports availab

2. Click OK to delete report.



## **COMMON REPORTS**

#### The Statistics Detail Report

This is the most used report at the MU level. It shows every single entry that was entered at the MU level in the period chosen and can be used to get information not available in other reports. This report can be useful in identifying where entries are incorrect and need to be adjusted. This report can be created in Adobe Reader, Microsoft Excel, or Microsoft Word format.

the salvation army	· - canada and bermuda		statistics detail report
period: august 2012 - au	gust 2012		Corps Name
service	activity	detail	total

#### SAMIS II - Rolls Management, Reports, & Charts

#### The Corps Membership Collection Form

This is a part of the annual review package. It provides the corps details on members added and removed as well as movement between the rolls. Aside from being part of the annual review document it's useful for the unit to print off the report prior to the annual review since it will show them areas where the rolls are incorrect so that they can adjust them. Note this report is only applicable to corps. The report is created in Adobe Reader format.

CORPS MEN	MBERSHIP	Collection	Form		Corps:	Cor	ps Name				Division:	Ontario Gre	at Lakes Divis	ion				
September 2012	eptember 2012 to September 2012																	
		Added												Removed				
	# of Member at End of Prior Period	# Transferred from Gr. Soldiers Roll	# Transferred from Recruits Roll	# Transferred from Jr. Soldiers Roll	# Transferred from Adherents Roll	# Transferred from Friends Roll	# Transferred from other Corps	# Reinstated	# Other	# Transferred to Gr. Soldiers Roll	# Transferred to Recruits. Roll	# Transferred to Jr. Soldiers Roll	# Transferred to Adherents Roll	# Transferred to Friends Roll	# Transferred to Another Corps	# Promoted to Glory	# Removed (Requires DHQ Approval)	Members Now on Roll
Sr. Soldiers	168	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	168
Sr.Recruits	15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	15
Jr. Soldiers	13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	13
Adherents	215	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	215
Friends	72	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	72
Total	483	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	483
" These figures n	nust reconcile with	h the number of r	names on your	Corps rolls at th	e end of the ye	ar.				-								

"These figures will be adjusted in SAMIS by DHA following your submission of the completed collection form & the addition & removal worksheets A completed Growth History page will be provided for you at the DHQ review visit.

#### **Corps Ministries Health Summary**

This report details information that compares this year to last year and to 10 years ago. The information is grouped by purpose. Eg. Youth Outreach, Sr. Outreach, Youth Discipleship etc. This report is more commonly used by corps and DHQ than the total or average attendance report since almost all the information that is in those reports is available here. The report is created in Adobe Reader format.

period: september 2012 - september 20	)12						Corp	s Name	
		period selected			1 year ago			5 years ago	
piritual development	average	meetings	attendance	average	meetings	attendance	average	meetings	attendance
Sunday Morning	0	0	0	119	4	476	135	5	677
Sunday Evening	0	0	0	0	0	0	42	3	125
Bible Study, Prayer & Praise	0	0	0	10	2	19	8	3	25
Women's Ministries	0	0	0	15	11	170	20	2	40
Men's Fellowships	0	0	0	24	1	24	25	1	25
Adult Fellowship	0	0	0	0	0	0	0	0	0
Over 55 Clubs	0	0	0	32	1	32	37	1	37
Sunday School (Sunday)	0	0	0	16	3	49	34	4	136
Sunday School (midWeek)	0	0	0	0	0	0	0	0	
Junior Action	0	0	0	7	2	13	1	1	1
Youth Groups	0	0	0	10	5	49	7	2	14
Sr. Seekers 1 (total)		period selected			1 year ago 9			5 years ago 0	
Jr. Seekers 1 (total)		0			9			0	
Sr. Seekers Other (total)		0			9			0	
Jr. Seekers Other (total)		0			0			0	
Junior Soldiers Enrolled		0			0			0	
Adherants Added		0			0			0	
Senior Soldiers Enrolled		0			0			0	
ommunity care ministries		period selected			1 year ago			5 years ago	
Number of Persons Visited					23			62	
Number of Hours		0			32			15	
Number of Institutional Meetings		٥			1			0	
olunteer hours		period selected			1 year ago			5 years ago	
Regular Volunteer Hours		0			0			0	
Casual Volunteer Hours		٥			0			0	
nemberships		period selected			1 year ago			5 years ago	
		period selected 13			1 year ago 16			5 years ago 24	
nemberships		13 215			16 215			24 248	
nemberships Junior Soldiers		13			16			24	

#### Detailed Total Attendance Report

This may be a redundant report but it has been requested by corps after it was removed so it was created again. It provides a comparison of this year and last for the major discipleship statistics as well as the adult fellowship activities. This report is created in Adobe Reader format.

the salvation army - canada and bermu	la															detailed	total att	endance	report
period: september 2012 - september 2012																Corp	s Nam	e	
Ministry Unit	Sunday Cur	AM Pre	Sunday Cur	PM Pre	Sunda Schoo Cur		Sunday Sch Midweek Cur F		Bible Stu Cell Grou Cur		Alpha Cour Cur I	se Pre	Women Ministries Cur Pre	Ci	Adult Fellowship ir Pre		ver Clubs Pre	Men' Fellows Cur	
Cambridge Citadel	0	476	0	٥	٥	49	٥	٥	0	19	0	٥	0 14		0 0	0	32	٥	۰
Total:	۰	478	٥	0	0	49	0	0	0	19	۰	٥	0 14		• •	•	32	۰	0

#### Detailed Average Attendance Report

Same as the corps total attendance report except it provides average per meeting by dividing the total attendance by # of meetings. This report is created in Adobe Reader format.

the salvation army - can	ada and bermu	da							deta	iled average att	endance report
period: september 2012 - septem	ber 2012									Corps Name	
Ministry Unit	Cell Group Cur Avg Pre Avg	Sunday AM Cur Avg Pre Avg	Sunday PM Cur Avg Pre Avg	Sunday School Cur Avg Pre Avg	Sunday School Midweek Cur Avg Pre Avg	Bible Study Cur Avg Pre Avg	Alpha Course Cur Avg Pre Avg	Women Ministries Cur Avg Pre Avg	Adult Fellowship Cur Avg Pre Avg	Over 55 Clubs Cur Avg Pre Avg	Men's Fellowships Cur Avg Pre Avg
Cambridge Citadel	0 0	0 119	0 0	0 16	0 0	0 10	0 0	0 14	0 0	0 32	0 0
Total:	0 0	0 119	0 0	0 16	0 0	0 10	0 0	0 14	0 0	0 32	0 0

#### First Time Seeker Report

This report identifies where first time seekers were made in the corps. Each activity has the detail "first time seekers" available for it so this report is useful when corps, divisions or THQ need to delve into the stats further to determine which programs created first time seekers in a corps. This report can be created in Adobe Reader, Microsoft Excel, or Microsoft Word format.

the salvation army - canada and bermuda		First Time Seeker Report
period: september 2012 - september 2012		Corps Name
	Totals	
Junior Seekers 1 - Camp		
Family Camp	0	
Moms & Tots Camp	0	
Corps Retreats	0	
Music Camp - Junior	0	
Jr. Solder Camp	0	
Winter Camp	0	
Sunday School Camp	0	
Sports/Youth Express	0	
Youth Councils Camp (Jr.)	0	
Teen Fresh Air Camps	0	
Beaver Camp	0	
Cub Camp	0	
Jr Fresh Air Camps	0	
Pioneer Club Camp	0	
Brownie Camp (Burmuda)	0	
Other Outreach Camp	0	
Total Junior Seekers 1 - Camp	0	

#### SAMIS II – Rolls Management, Reports, & Charts

#### The Growth History Overview Report

This report is a part of the annual review package. It provides a comparison of all key information for this year, the last year and 5 years ago. It's also the report that is most commonly handed out by corps to officers who request information from them. This report is only used at the corps level. This report is created in Microsoft Excel format.

Corps Name		G	Growth His September 201	Ontario	Great Lakes Divi	icion		
- Official Salvation Army Rolls	2002	2011	2012	Senior Average Attendances (By # Meetings)	2002	2011	2012	
Senior Soldiers	0	172	168	Senior - Primary Worship Service	143 ( 5)	119(4)	0(0)	
Senior Recruits	0	15	15	Senior - Secondary Worship Service	74 ( 4)	0(0)	0(0)	
Junior Soldiers	0	16	13	Alpha	0(0)	0(0)	0(0)	
Adherents	0	215	215	Discipleship Groups *	14 ( 1)	10 ( 2)	0(0)	
Total IHQ Official Membership	0	418	411	Healing & Wholeness (Recovery Ministries)	0(0)	0(0)	0(0)	
Friends	0	63	72	Men's Ministries	17 ( 1)	24 ( 1)	0(0)	
TOTAL Canada & Bermuda Membership	0	481	483	Senior Ministries	25 (1)	32 ( 1)	0(0)	
Membership Registers	2002	2011	2012	Youth Average Attendances (By # Meetings)	2002	2011	2012	
Cradle Roll Register Member	0	23	23	Sunday School	52 ( 5)	16 ( 3)	0(0)	
Sunday School Register Members	0	54	54	Weekday Sunday School	0(0)	0(0)	0(0)	
CCM Members	28	15	15	Children's Outreach/Fellowship **	0(0)	11 ( 2)	0(0)	
Healing & Wholeness Ministry # Trained Facilitators	0	0	0	CROSSzone & CROSStraining (Corps Cadets)	9(6)	0(0)	0(0)	
Seniors Ministries Members	46	64	64	Junior Action	0(0)	7 (2)	0(0)	
Men's Ministries Members	25	25	25	Pioneers & Kid's Club	0(0)	0(0)	0(0)	

#### The Women's Ministry Report

This report details information on women's ministry activity at the MU level. The tabs at the bottom of the report indicate the different areas corps could have. So Home League, Focus Groups etc. are listed there. For all intents and purposes this report isn't needed at the MU level since most will only have 1 or 2 activities occurring but it's there to be consistent with the Divisional reports. This report is created in Microsoft Excel format.

Women's Ministries Attendance/S Division: Ontario Great Lakes Div								
Period: September 2012 - Septem	nber 2012							
		(Rallies /			TS - IN COI Teas / Dinn		ing / etc)	
					Spiritual		<i>. , ,</i>	
Ministry Unit					# of Families	# of Soldiers	# of Adherents	# of Young People
	# Meetings / Events	# Attending	Seekers 1st	Seekers Other	linked thru WM	made thru WM	made thru WM	linked thru WM
Corp Name	0	0	0	0	0	0	0	
Total	0	0	0	0	0	0	0	

#### Youth Discipleship Report (Total)

This report compares total attendance from this year to last for all youth discipleship activities individually including Sunday School, Midweek School, Jr. Action, Cross Zone, Cross Training, Children's Worship, VBS, Pioneers and Kid's Clubs. Note Pioneers and Kid's clubs are outreach at some corps and discipleship at other but will be included in only one report.

#### Youth Discipleship Report (Average)

This report will be the same as the above report but showing average per meeting instead of total attendance.

#### Youth Outreach Report (Total)

This report will compare total attendance from this year to last for all youth outreach activities individually including Jr. Youth Group, Sr. Youth Group, Guiding, Scouting, Sports Action and all similar activities. Note Pioneers and Kid's clubs are outreach at some corps and discipleship at other but will be included in only one report.

#### Youth Outreach Report (Average)

This report will be the same as the above report but showing average per meeting instead of total attendance.

## CHARTS

There are a couple charts built into SAMIS that provides a variety of information.

1. Click Action, Charts.



#### Sunday AM Attendance Chart

This chart shows the total Sunday AM attendance for the current year and for each of the previous 5 years.



#### <u>Members on Roll Chart</u> This chart shows the current rolls to date for the

Selected Month
Members on Roll



Right click on the chart to get options



## Hover over the charts to get percentages.

## Primary Purpose Activity Chart

This chart shows the activities by primary purpose for the month. It varies depending upon the month. If there were no activities for the month, you would not see the category.

#### Age Target Activities Chart

This chart shows the activities based on age for the month. It varies depending upon the month. If there were no activities for the month, you would not see the category.



You can also display the percentages and options with these charts as the Members on Roll chart above.

## LOGGING OUT OF SAMIS

You can log out of Kettle Program in one of two ways.

1. Click Log Out in upper right pane of SAMIS Program.

