



 Owner's Manual

# Church Census System

Overview; Managing Census



visit us on the web at [www.RaicheConsultants.com](http://www.RaicheConsultants.com)

# Table of Contents

Using this manual .....	4
System Overview .....	4
Installing the program .....	5
Networking .....	6
Setting up the program.....	7
Customizing for your parish .....	7
Manage Census .....	8
Family Tab .....	8
Table Updates .....	9
Parish Info.....	11
General Information for the remaining Tables: .....	13
Marriage.....	14
Mass Attend .....	14
Special Needs.....	15
Activity .....	16
Religion.....	17
Relationships.....	18
Catholic schools:.....	19
Family Activity .....	19
Language.....	21
Occupation .....	22
Public School .....	23
Church Names.....	23
Visit Reasons .....	24
Preferences .....	25
Update/View .....	27
General information on the following sections.....	27
Add New Family.....	27
Delete Family.....	29
Change Family Number.....	30
Error message – unsuccessful change.....	31
List Available\Used Numbers.....	32
Data Entry .....	33
Members Tab .....	37
Manage Activity.....	37
Activity Management.....	38
Individual Activities.....	39
All Activities/Labels: .....	40
Leaders Report/Labels .....	41
Member Rosters/Labels .....	42
Add Members.....	43
Delete (all members).....	45
Update Email/Cell by Activity.....	45
Minister Management .....	46

Create List..... 48  
Report..... 48  
Labels for All ..... 49  
Member Interests ..... 49  
    Entering Member Interests..... 50  
    Managing Member Interests ..... 50  
    Reports ..... 51  
    Labels ..... 52  
Clear All Interests ..... 52

# **Raiche Consultants Church Census System Owner's Manual**

## **Using this manual**

This manual will help you navigate through the Census program by taking you through each of the menus and every entry in each menu. Actual screens will be displayed with a description of the features shown.

## **System Overview**

The Raiche Consultants Catholic Church Census system is a completely integrated system for managing your parish. It started as a DOS program in 1985, designed with the help of a parish priest. Through the years it has evolved, and in 1994 was re-written in Windows. It continues to be an active and growing program with one yearly update based on input from you, the users of the system.

Currently the Census program runs on Access 2007 runtime. Most of today's Windows-based computer systems today are capable of handling our program. Windows XP/Vista/7 is appropriate. More memory and a faster processor will make the system work better. For screen resolution we highly recommend using 1024 x 768. Reports are designed to print on a laser or ink jet printer.

The Census System can run on a single computer, or on a network. There is also a version for "yoked" parishes.

Since the users themselves are our greatest source of suggestions, many different parish situations are already incorporated into the system.

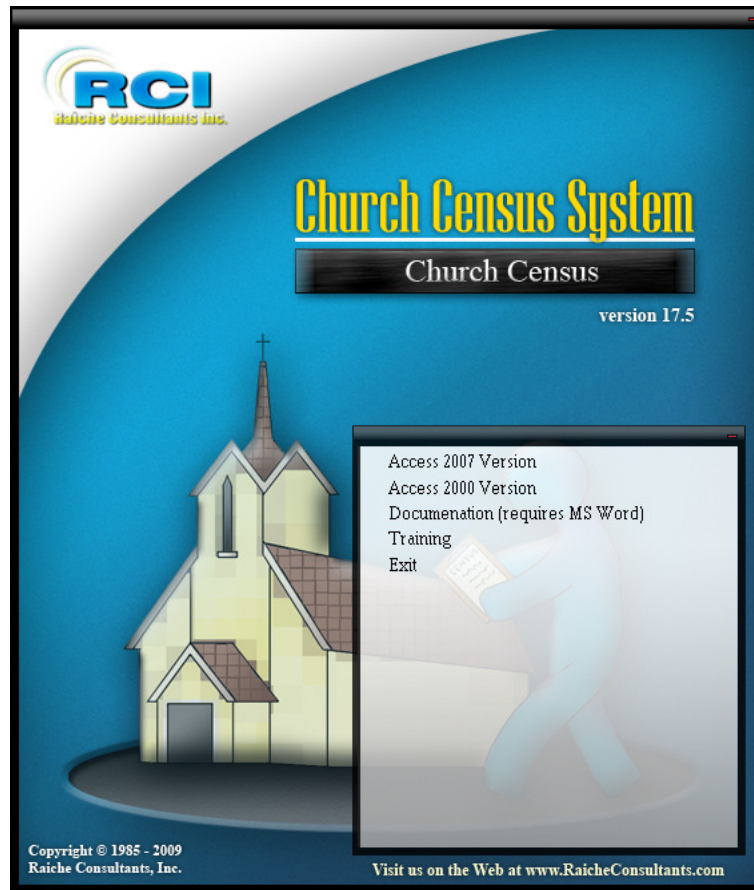
As with any computer system it is only as good as the input. Raiche Consultants Inc. accepts no responsibility for accuracy of the output. It is up to the individual user to verify the correctness of the output.

This program is the property of Raiche Consultants, Inc. and is written in Microsoft Access. You are not permitted to alter the code of the program without permission of the authors. However, any changes you make to the code will be overwritten when the updates are installed. Raiche Consultants is not responsible for errors or the performance of the original program if you choose to add to or alter the code in any way.

Please contact Raiche Consultants if you have any suggestions for improvements or enhancements.

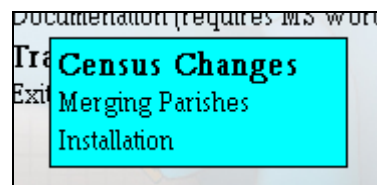
## Installing the program

The installation CD is menu driven. Once you place the CD in your drive a menu similar to this one for version 17.5 will appear.



Ver. 17.5

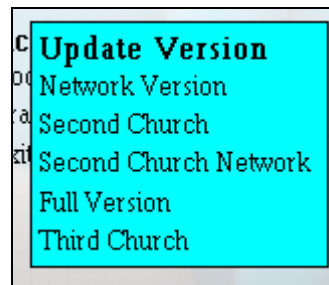
First click on *Training* and this (or a similar) menu will appear.



Ver. 17.5

Click on *Installation* and a brief audio/visual presentation will assist you in the proper setup procedure.

Clicking on either *Access 2007 version* or *Access 2000 version* will give you the list of options you need to install the program on each computer.



Ver. 17.5

## Networking

The system can be used as a network program without any modifications. You must network your computers and designate one as the controlling (main) computer.

Install the system on the controlling computer as you would any stand-alone system. After it is installed, set up the C:\Census directory as a shared directory. On *each* of the other computers set up a drive mapping to the \Census directory on the main computer as a "k:" drive. You can then install the Network Version (also known as "k" version, named after the drive mapping). This version can be installed on as many computers as you have on the network.

Each computer must have its own copy of MS Access, but they do not need to be the same version, i.e. you can mix Access 2007 and Access 2000. Each computer must have a drive mapping as "k" to the main computer.

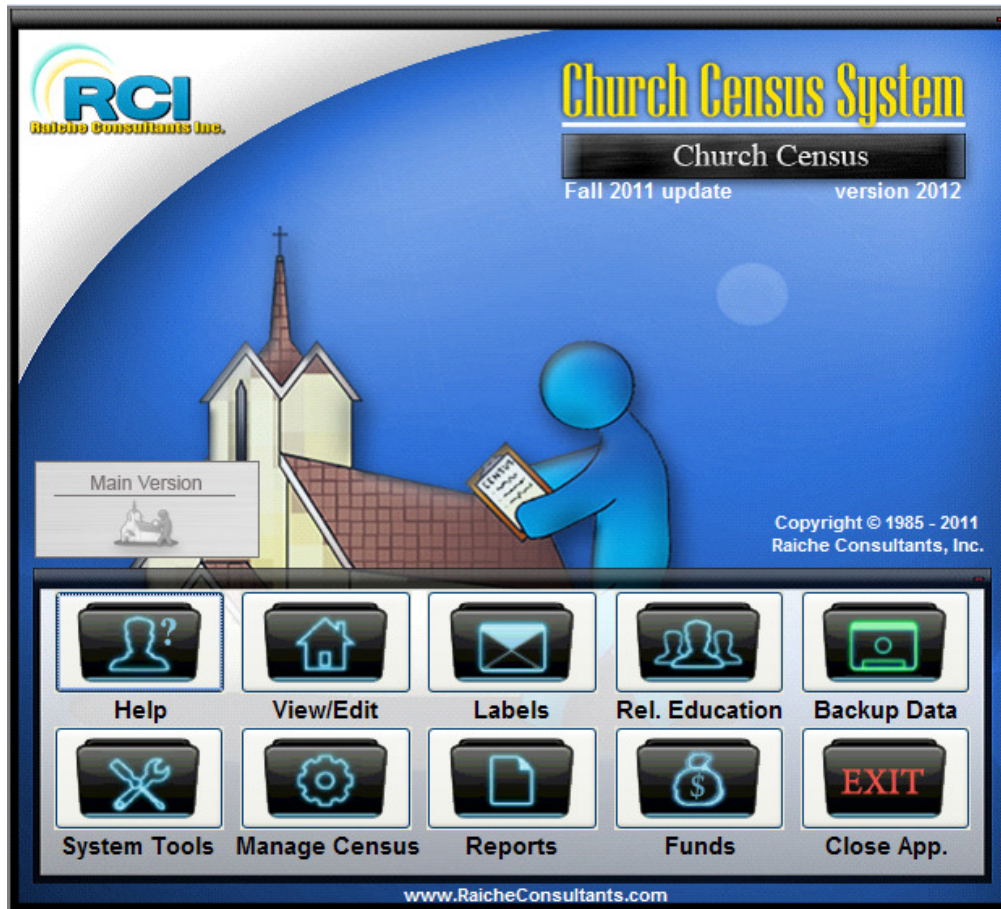
**See documentation included with your installation disk for "K" drive instructions.**

Important: the main computer **MUST** be turned on when you are running the Census System on any of the networked computers. Otherwise you will not have any data on your screen.

If for some reason you break the "k" connection, you must re-map the system to reestablish the sharing of data with the Census System.

# Setting up the program

## *Customizing for your parish*

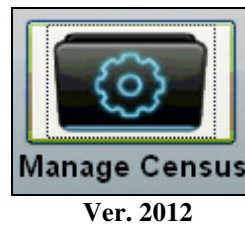


Ver. 2012

Before you enter in any of your data there are some items you should consider. The first item to understand is that a unique identifier must be assigned to each family. Rather than having random, meaningless numbers we use the Family Number assigned for weekly contributions. This number appears on the weekly envelopes. Families that do not receive weekly envelopes are assigned a number in a special range.

For the purpose of this application a “family” is defined as anyone receiving an envelope number. If a husband, wife and adult child all live in the same house, but receive their own envelopes, they are each considered their own family.

## ***Manage Census***



This menu has several selections to help you input and manage your data. It is designed to get you directly to some of the more important tools quickly. We will examine each one separately.

Clicking this button will open the following screen:



Ver. 2012

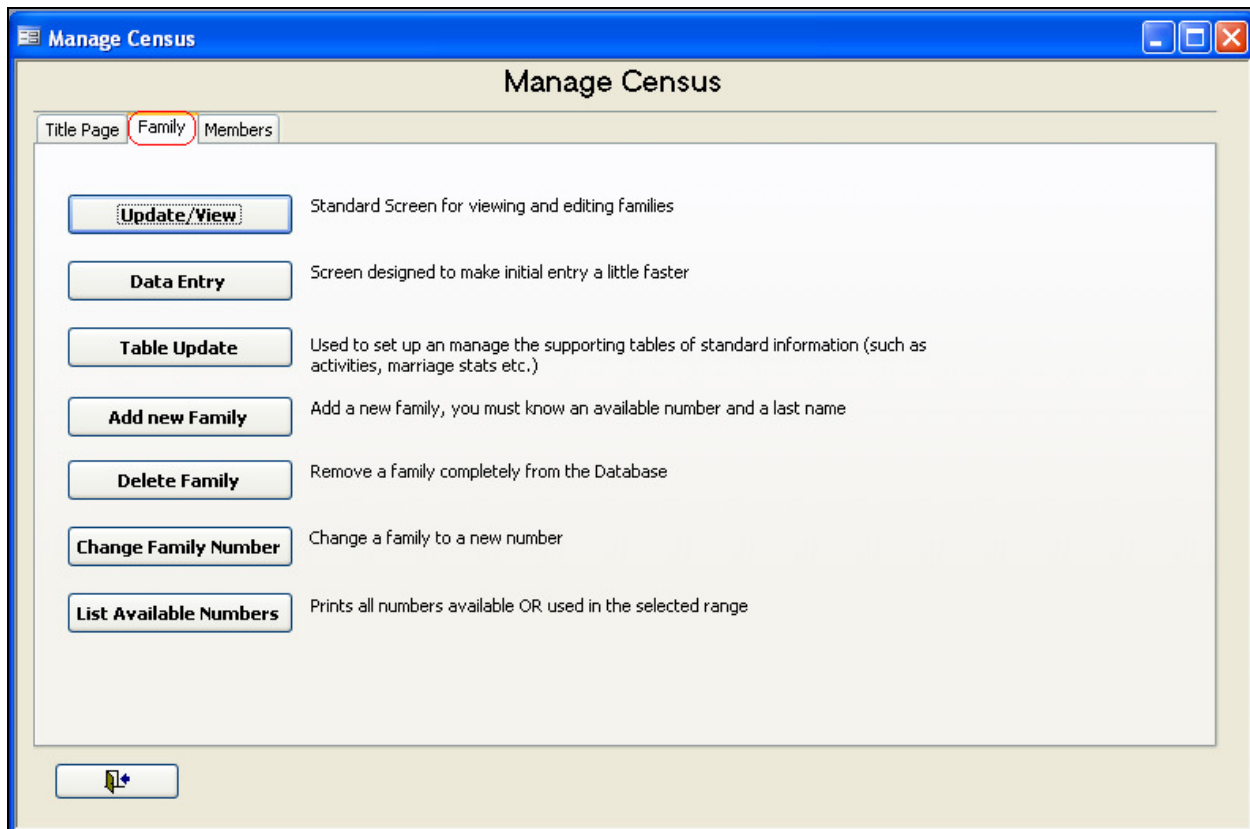
New in version 17.5 are Tabs on the menu screen. Drop-down menus are being replaced with Tabs which are organized to help you find quickly the information you need.

This menu uses Family and Member tabs.

### ***Family Tab***

Clicking the Family Tab opens this menu:





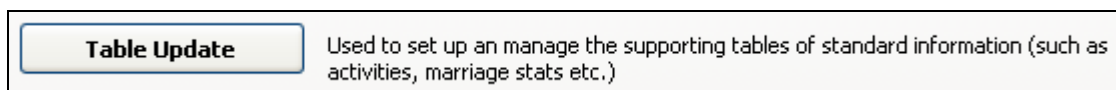
Ver. 2012

## Table Updates

One of the most powerful tools in this program is the ability to create drop-down lists of common entries to speed up data input, and keep these entries consistent. The program is very flexible in allowing you to set up these lists for the many different drop downs by using terms and categories familiar with your parish. All of the lists are pre-filled with sample items. You may choose to modify, add to or delete from these. You can control the contents of these tables by selecting *Table Updates*.

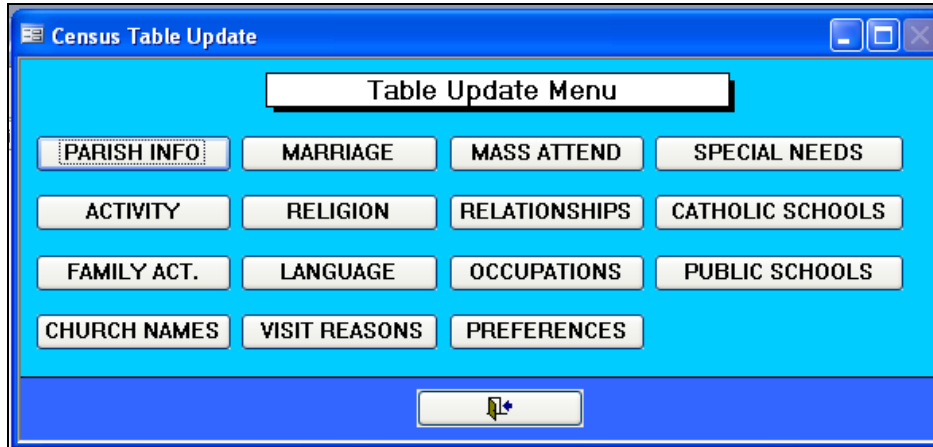
*It is suggested that you look over these options and set this up prior to entering any data.*

You can always add additional items as needed, but you should **NEVER** delete an item that is currently in use.



Ver. 2012

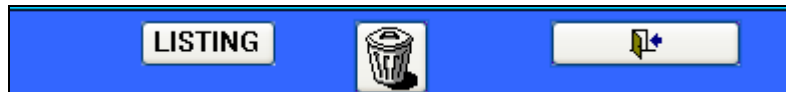
Upon clicking on *Table Update* you will see the following screen. The following pages will take you through each selection.



Ver. 2012

**Special Note:**

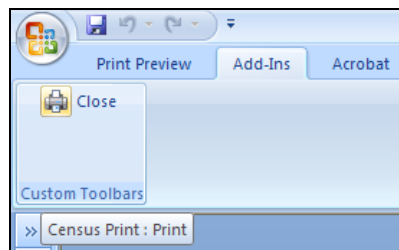
At the bottom of each screen (except Parish Info) these icons will appear.



Ver. 2012

Clicking **LISTING** will show *on screen* the complete contents of the table shown.

The Report Window:



Ver. 2012

With the new Access runtime, the screens will appear different.

This screen shows a combination of a printer icon (left) and the Close command.

Clicking the Printer icon will print the list. (Shown highlighted by the mouse pointer)

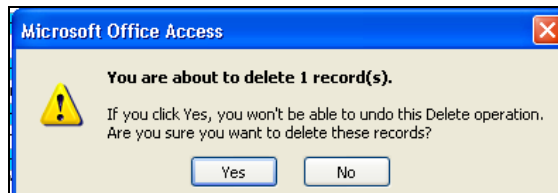
Clicking Close closes the report window.

**To delete a record**, highlight the line you wish to delete, and click the trash can icon.



Ver. 2012


When you click the icon, this message will appear:



Ver. 2012

Click **Yes** to complete the deletion – there is no recovery from this action.  
Click **No** to cancel the command.

To close the window:

Click the Door icon  will close the window.

## Parish Info

Parish Information is essential for identifying your parish on letterheads and reports in addition to operating parameters. Each item is explained below.



Clicking this button opens the following screen:

Parish Information		
<b>Information</b>		
<b>Parish Name:</b>	St. Columkille Parish	
<b>Street:</b>	1400 Saint Jude Ln.	
<b>PO Box:</b>		
<b>City:</b>	Southbridge	
<b>Phone:</b>	413-555-7878	
<b>Zip:</b>	11544	
<b>State:</b>	MA	
<b>Diocese Name:</b>	Diocese of Fall River	
<b>Home Minister Code:</b>	EMH	
<b>Home Parish:</b>	St. Columkille Parish	
<b>Class Start Memo:</b>		
Religious Education Classes (CCD) for 2002/2003 begin the week of September 22, 2002.		
Grades K-5 begin on Tuesday, September 21 at 3:40 p.m. for one hour.		
Grades 6-8 begin on Monday, September 20 at 3:30 p.m. for one hour.		
Grades 9-11 begin on Monday, September 20 with Mass in the church at 7:15		
<b>Fund Information</b>		
<b>Current Accounting Month:</b>	May	
<b>Fund 1:</b>	Regular	
<b>Fund 2:</b>	Diocesan	
<b>Fund 3:</b>	Special	
<b>Fund 4:</b>	Maintenance	
<b>Annual Drive:</b>	test fund	
<b>Envelope Breakdown</b>		
	<b>Start</b>	<b>End</b>
<b>Regular</b>	1000	7999
<b>School:</b>	5000	5999
<b>Inactive Mail:</b>	6000	7999
<b>Inactive No Mail:</b>	8000	8999
<b>Moved/Deceased:</b>	9000	9999

Ver. 2012

**Name/Address:** enter your parish information.  
These will appear on the letterhead of your reports.

**Diocese Name:** Enter your diocese name.

**Home Minister Code:** code is taken from the *Activity* table. More information in later sections.

**Home Parish:** Select your parish from this drop-down. If your parish is not on this list, you can add it in the Church Names table. This will be used on the *Member-Sacrament* page.

**The Class Start Memo** is used on the Religious Education startup form. This should be updated yearly as needed prior to printing the startup form. See Religious Education Menu for more information.

**Fund Information:** You also have the opportunity to rename any of Fund 1 – 4 entries. You should not change these during the year. See the *Fund Menu* section for an explanation of how these are used, including *Annual Drive* and *Current Accounting Month*.

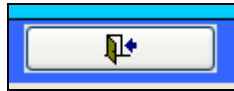
**Envelope Breakdown:** You must also decide on the ranges for your envelope (family) numbers. This is the key to the data file and a number *must* be assigned to every family.

► **NOTE:** *All envelope number fields must have a value entered.* Regardless of the values you enter, the ranges **MUST** be consecutive (see screen image – above).

The intentions of these ranges are as follows:

- **Regular:** These families receive weekly printed envelopes.
- **School:** This is for comment only. Used by some parishes to identify any family that has students in Catholic schools.
- **InAct-Mail:** (Inactive but receiving mailings): This must start at the next number from the end of Regular. These families attend church and should receive mailings, but do not receive envelopes.
- **InActive No Mail:** (Inactive receiving no mailings): These are families that are kept on the books, but do not regularly attend church, do not receive envelopes, and do not receive parish mailings.
- **Moved/Deceased:** These families have moved out of the parish, or all members are now deceased. They are kept on file for historical reference or they still have funds recorded against them. They are excluded from all reports.

Press **EXIT**



to save changes, and return to the *Table Update* menu.

## General Information for the remaining Tables:

Each of the tables in *Table Update* contains information which you will see in drop-down lists throughout the program. The items in each list consist of two parts: an ID code (which you can create) that does not appear but is used by the program, and the descriptive phrase (which you can also create/modify) that is seen both on screen and in reports.

**A word of caution:** once you begin entering in data, do not change any codes. Changing a code will make information non-retrievable. Once a code is used then changed, the program will not be able to locate the original entries – the data is lost.

**Suggestion:** if you need to change a description, do so, but leave the code as is.

Some codes are required by the program. One of these is **HH – Head of Household**. Changing or deleting this code will cripple the program causing blank screens and poor reports.

Each Table screen works basically the same way:

**To add a new entry,** scroll to the bottom and click in the empty field.

Once you begin to type, a new blank line will appear below the current one.

**To change an existing entry,** click in the field and type.

To delete an entry, click in the grey area to the left of the entry, then press the Trash can icon. You will be asked to confirm the deletion. Click Yes.

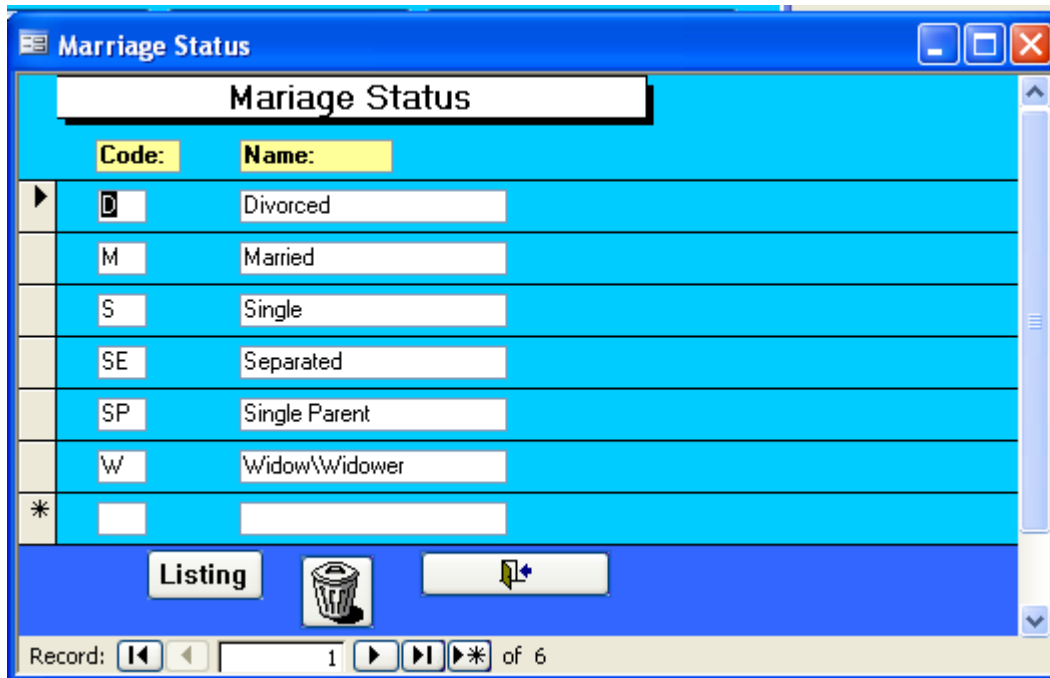
Listing gives you a report of the complete table.

## Marriage

This table contains the more common descriptions for Marriage Status.



Clicking this button opens the following window



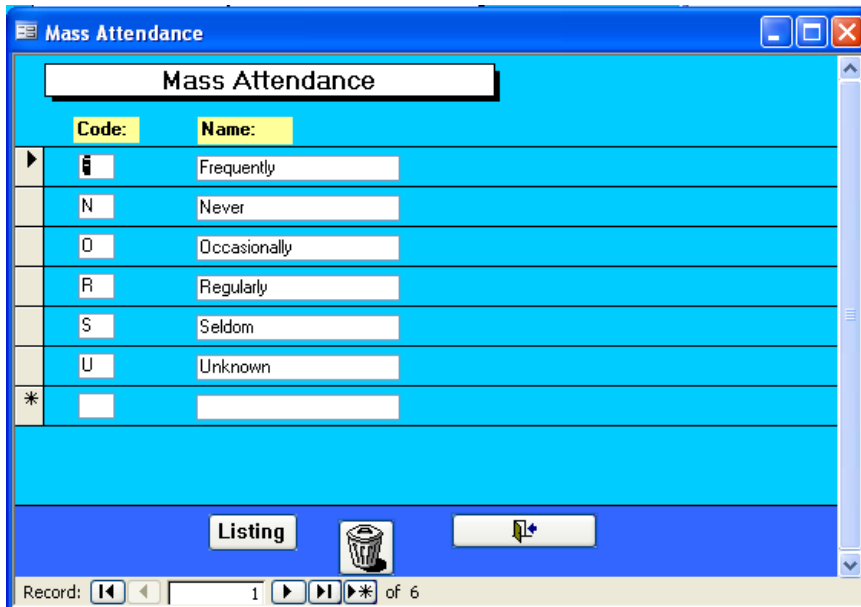
Ver. 2012

## Mass Attend

This table contains the more common descriptions for Mass Attendance.



Clicking this button opens the following window



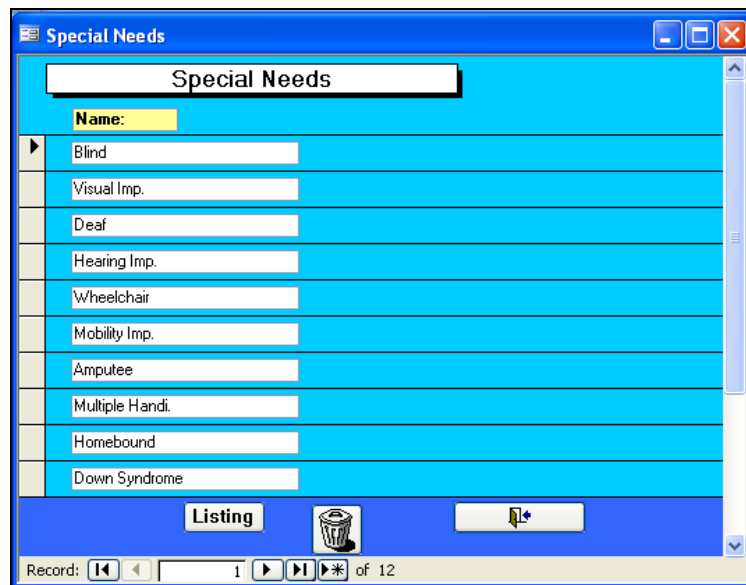
Ver. 2012

## Special Needs

This table contains descriptions of conditions requiring special attention for staff and volunteers. Reports are available to identify individuals in need of special attention.



Clicking this button opens the following window



Ver. 2012

## Activity

This table contains a comprehensive listing of all your parish's activities/ministries for *individual members*. A sample list is included which you can modify as needed.



Clicking this button opens the following window:



Ver. 2012

As you see, the Code field can be used in several ways. Duplicates are NOT allowed. Click **Listing** to see/print out the complete list of activities.



**ACTIVITIES**

<u>Code</u>	<u>Activity</u>	<u>Code</u>	<u>Activity</u>
TCI	200 Club	RET	Rel Ed Teacher
AdS	Adult Altar Server	SI	Shutin
ASF	Altar Serv. Funerals	SC1	Spec Class: Contr NonAct
AS	Altar Server	SA	Stewardship Drive
ASo	Altar Society	U	Usher
Aa	Annual Appeal	WC	Women's Club
BS	Bible Study	YG	Youth Group
C	Choir/Cantor		

Ver. 2012

## Religion

Not everyone in your parish's families is Catholic. This is a way to retain complete information on all family members, and respect their choice of worship.



Clicking this button opens the following window:



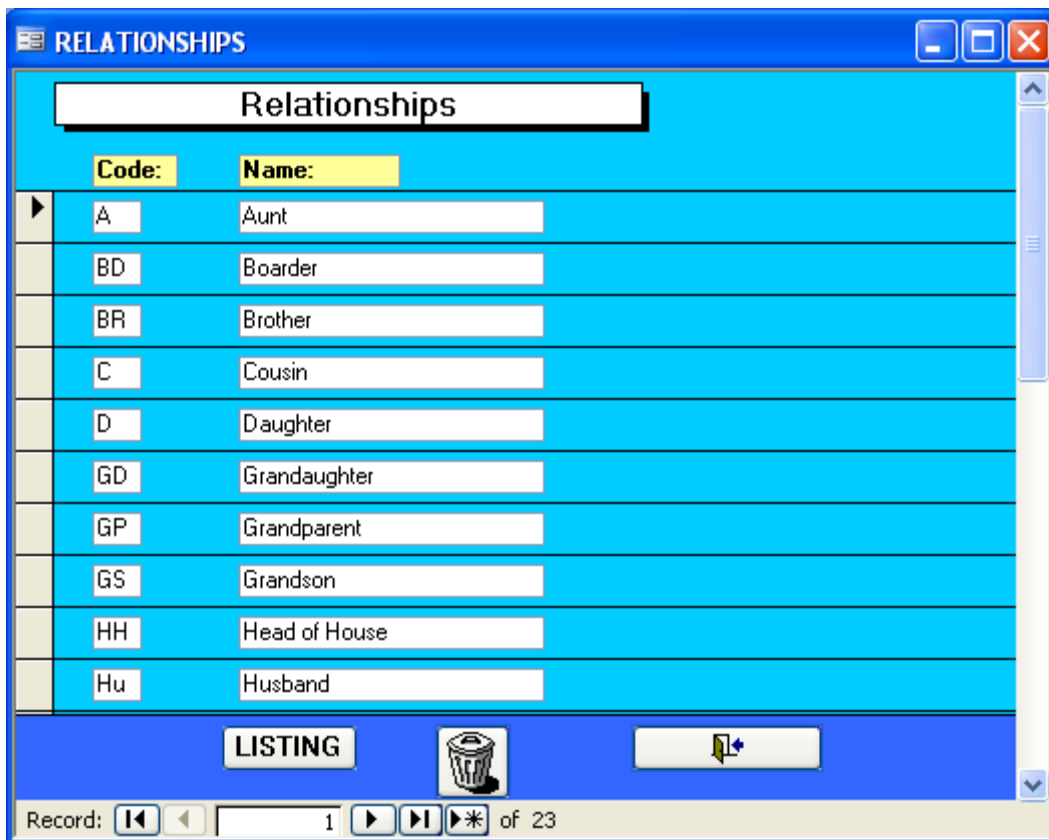
Ver. 2012

## Relationships

This table will establish a **Head of Household (REQUIRED – code HH)** and how each family member relates to the Head. You may change the *description* of Code **HH**, but it **MUST** be used for the program to function properly.

**RELATIONSHIPS**

Clicking this button opens the following window:



The screenshot shows a software window titled "RELATIONSHIPS". At the top, there is a search bar containing the text "Relationships". Below this is a table with two columns: "Code:" and "Name:". The table contains the following entries:

Code:	Name:
A	Aunt
BD	Boarder
BR	Brother
C	Cousin
D	Daughter
GD	Grandaughter
GP	Grandparent
GS	Grandson
HH	Head of House
Hu	Husband

At the bottom of the window, there is a "LISTING" button, a trash can icon, and a "Record:" field showing "1 of 23".

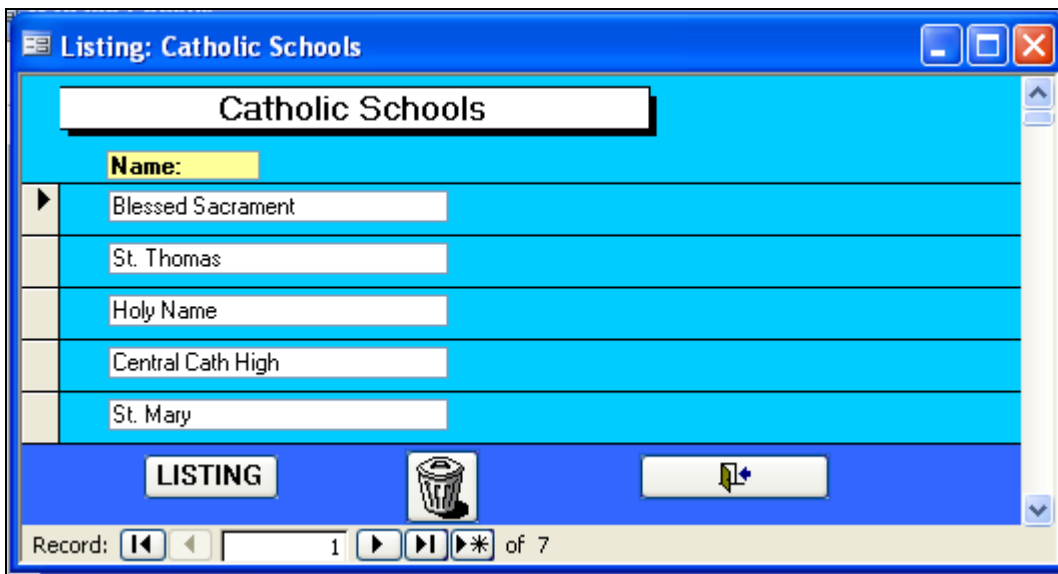
Ver. 2012

## Catholic schools:

This table contains the names of Catholic schools where your parish children attend. This is important when identifying children for religious education classes. There is also a listing for public schools.

**CATHOLIC SCHOOLS**

Clicking this button opens the following window:



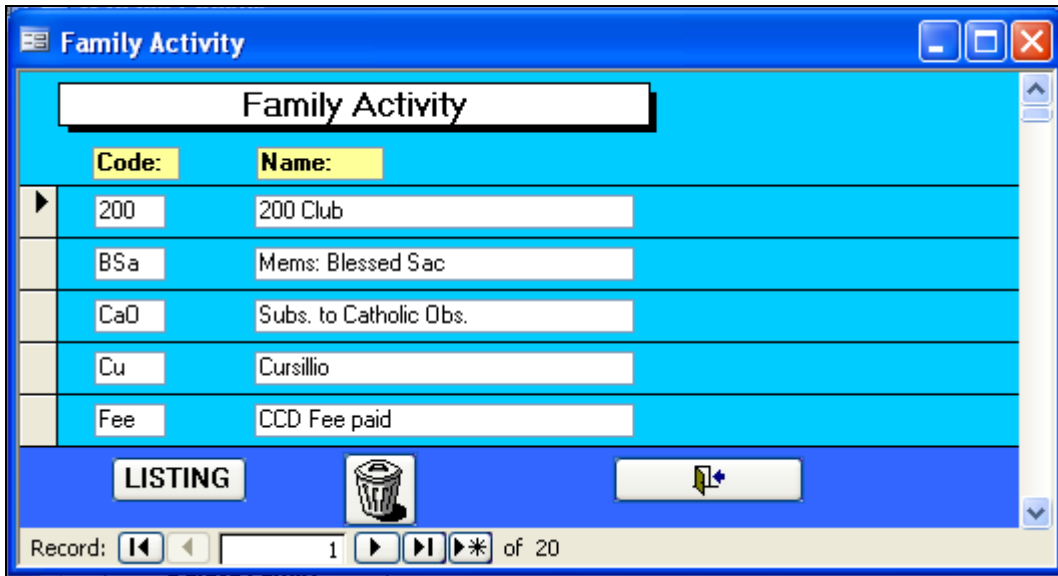
Ver. 2012

## Family Activity

Family Activities are activities related to an entire family, not just an individual person. As shown in the examples below, this has the flexibility to record/track more than activities.

**FAMILY ACT.**

Clicking this button opens the following window:



Ver. 2012

**Please note:** the following examples are abbreviated to match the sample screen above. Some examples are shown below:

The use of “*Mems: Blessed Sac*” is an example of a family active in your parish, but they belong to another parish.

“*Subs. To Catholic Obs*”. Indicates this family subscribes to the diocesan newspaper.

“*CCD Fee paid or Waived*” helps track these payment statuses.

There is no limit to the variety of ways you can group and report on your parish families.

## Language

This table allows you to identify the various languages spoken within the parish. As you will see, each member has TWO language options:

- **Language** (meaning the primary spoken language), and
- **Secondary** language to identify a person who is bi- or multi-lingual.



Clicking this button opens the following window:

Name	
English	<input type="text"/>
French	<input type="text"/>
Spanish	<input type="text"/>
Porteguese	<input type="text"/>
Sign Language	<input type="text"/>
Polish	<input type="text"/>
Korean	<input type="text"/>
Chez	<input type="text"/>
*	<input type="text"/>

Record: 1 of 8

Ver. 2012

## Occupation

This table records all the occupations of your parishioners. This is useful if the pastor needs, for example, a carpenter, electrician or plumber for the parish property. Another use is to identify teachers (for Religious Education) or musicians (for the choir).



Clicking this button opens the following window:

Name:
Accountant
Administrative Assistant
Attorney
Bank Supervisor
Bookkeeper
Business Manager
Carpenter
Certified Home Health Aide

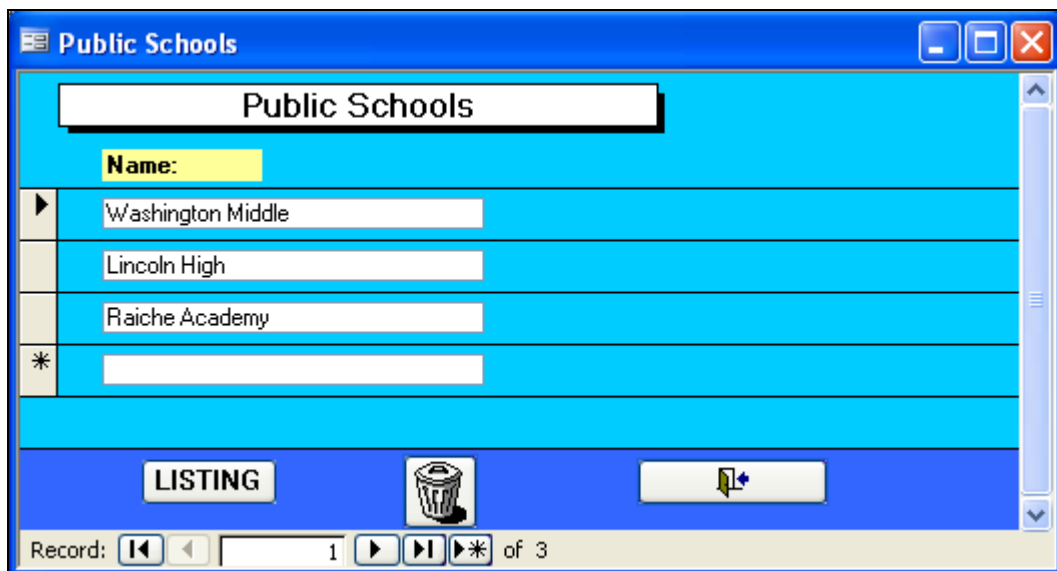
Ver. 2012

## Public School

This table contains the names of public schools where your parish children attend. This is important when identifying children for religious education classes.



Clicking this button opens the following window:



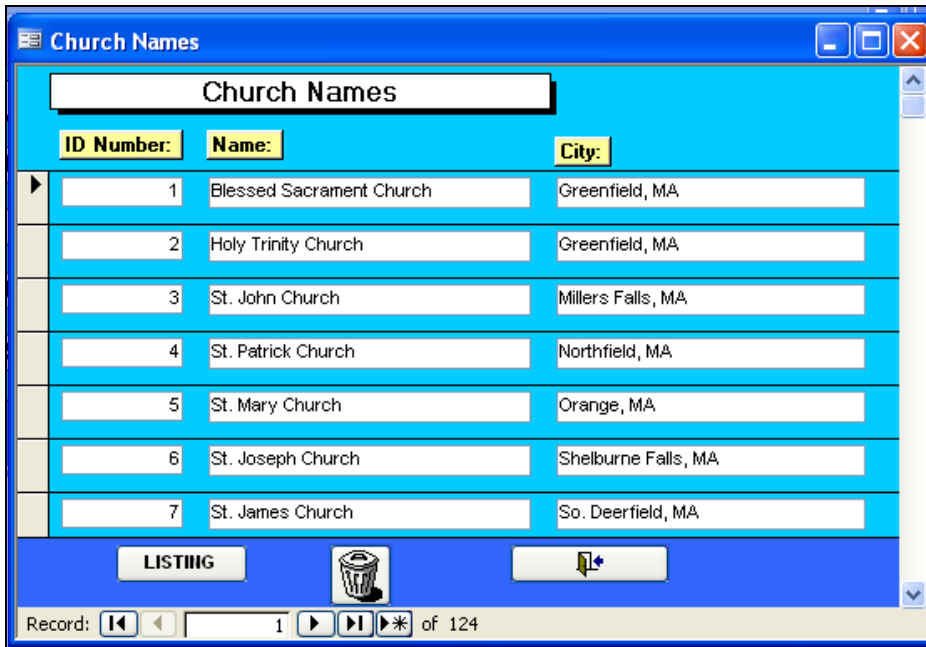
Ver. 2012

## Church Names

Pre-loaded in the Census System are all the parishes within the Springfield diocese, even those that existed before the mergers began. These names are primarily used on the Sacrament page in the Member section. Since sacraments are received (conferred) in parishes outside the diocese, you may find it useful to add these parish names to this list. This can be done here or on the Sacrament page of any member.



Clicking this button opens the following window:



Ver. 2012

## Visit Reasons

On the Family page is an option for Home Visits. This table records the common reasons for a home visit.



Clicking this button opens the following window:





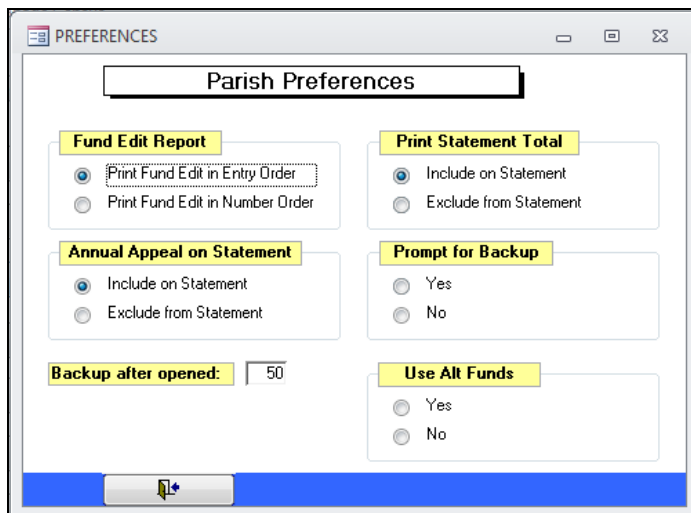
Ver. 2012

## Preferences

We try to accommodate requests from all parishes, sometimes these request are the direct opposites of each other. When this is the case we try to resolve this by allowing each parish to choose their own preferences.



Clicking this button opens the following window:



Ver. 2012

There are a few items that can be changed at the parish level.

*Fund Edit Report:* the two options currently available are:

- Print Fund Edit report in **Entry order** or **Numeric order**.

After a batch of envelopes is entered you have the option to print an edit report showing each envelope that was entered in that batch. Most people like the report to be printed in the same order that the envelopes were entered, making it easier to verify in case of a discrepancy. On the other hand some people like to have this printed in alphabetical order by last name. You can choose one or the other.

*Annual Appeal on Statement:* you can:

- Include/Exclude the Annual Appeal amount from the annual statement.

You have the option to include the amount pledged to the annual appeal on the year end fund statement. If you did not use the census system to record this or want to rely on the diocese to report this information then you can choose to exclude this from printing on the statement.

*Statement Total page* – This is not currently used.

*Prompt for Backup:*

This gives you a checkbox allowing you the option to turn on/off the Backup Prompt dialog box.

*Backup after opened:*

Is used to indicate how many times the program is opened before the user is prompted to perform a backup.

For those who are really good about backing up their data, you may not want to be nagged by the program. The program keeps an internal counter, similar to the way Quicken and QuickBooks does and counts each time the program is opened. Once that counter exceeds the number entered on this screen it will prompt you to do a backup. Once you answer “yes” it resets the internal counter to 0. The higher the number on this screen the less often you will be prompted for a backup. The maximum is 999.

More on **Backup** and **Restore** can be found in the **System Tools** manual.

## Update/View

Update/View is the main portal to the Census Program. For a full discussion of this area of the program, see manuals Update-View pt. 1 (for family information) & pt. 2 (for member information).



Ver. 2012

Information found in these manuals will help you understand some of the features described here.

## General information on the following sections

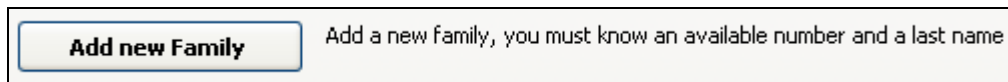
Discussion in this section assumes you have an understanding of the envelope numbering system for you parish, and that you have read the previous section under:

### Table Updates – Parish Info

The term **Family Number** is used within the program. This is the number which appears on the parish's weekly envelopes (**envelope number**). These terms are fully interchangeable.

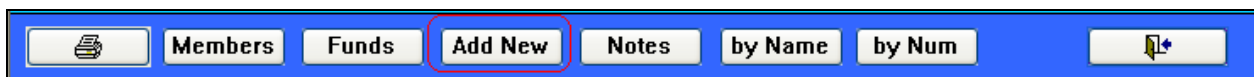
## Add New Family

When a new family joins the parish you need to assign to them an envelope number and begin to enter their data into the program.



Ver. 2012

Clicking this button (above) or the **Add New** button at the bottom of the Family Membership Record screen (shown below)



Ver. 2012

will open this screen:

**CREATE NEW FAMILY**

New Family Number  Last Name:

Ver. 2012

To create a new family record, enter the envelope number chosen for this family.

Press **TAB** or click in the **Last Name** field.

Enter the family's **Last Name**. Be sure the spelling is correct. Press **TAB** or click **OK**.

The **Family Membership Record** page (Family Screen) opens.

This is the main screen for the Census program.

**Family Membership Record**

Find Family:

**Personal Information** Family Number: 1025

Last Name: Cascade  
 Secondary Name: Flood  
 Salutation: Mr & Mrs  
 Head Of House: Ronald  
 Middle Initial: F  
 Full Middle Name:  
 NickName: Ronnie  
 Suffix:  
 Spouse's 1st Name: Tina  
 Approx Yr Joined: 2000  
 Date Joined: 2/5/2000  
 Previous Parish: St. Joseph, Attleboro, VT

**Last Update**  
10/20/2009

Street Num: 45  
 Street Name: Slave St.  
 P#O# Box: Suite 4  
 City/Town: Hungary  
 State: MA  
 Zip Code: 01195  
 Home Phone: 555-999-0202 Unlisted: N  
 Business Phone: 555-900-2099  
 Fax Number: 666-999-0993  
 Family Cell Num:  
 Family E-mail:

Home Communion: N Name:  
 Home Communion Minister:  
 Home Communion Comment: Home Visits

**Family Activity**

200

Family Members: 1 Notes: 0 Section: F Area: 6

**RELIGIOUS EDUCATION - Family Information**

# Children in Program 0 Fee Paid: \$0.00  
 Registered, no fee due

**Other Options**

Envelopes used   
 Date of Last Contribution Prior month: 3/8/2005  
 Label Select   
 Primary Record   
 Temporarily Inactive   
 Reason:

Ver. 2012

The family screen will appear containing **ONLY** the following:

- Last name (also shown in Find Family drop-down)
- Salutation (Mr. & Mrs. by default)

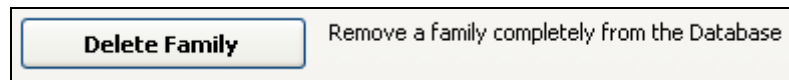
- Family Number
- A few other fields which contain zeros
- Primary Record checkbox is checked

You must enter all the remaining family information.

- Missing information can be added at anytime.
- Changes are easily made by re-typing over the error.

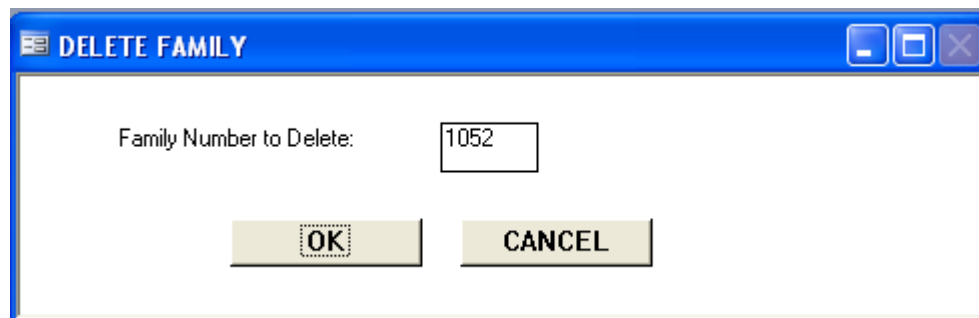
## Delete Family

A family is deleted when they no longer live in, or participates in the parish. Deleting a family removes all of their data *including any funds contributed*.



Ver. 2012

Clicking this button opens the following window:



Ver. 2012

(The *Family Number to Delete* field will be blank).

Enter the **Family Number** for the family you wish to delete. Press **OK**, and you open this screen:

Ver. 2012

If the family has funds in their record, you will see this here. In some cases, you may wish NOT to delete the family. Deleting will remove the Funds from parish totals. You may then choose to change the family number into the Inactive range. At this point, press **Cancel**.

When you choose to delete the family, enter your initials and the reason for the deletion. Press **OK**.

The *date, family number, name, address, funds on record, your initials* and the *reason for delete* go into the Deletion History file. (See **Deletion History** in the **Reports** section for more information).

## Change Family Number

There will be times when a family number needs to be changed. Then may not want to receive any mailings, or they may have moved but you need to keep their records on file.

In a parish merger situation, the ability to change the number is important. Each parish situation is different.

Ver. 2012

Clicking this button opens the following window:

Ver. 2012

Enter the existing **Family Number** in **Current:** field.

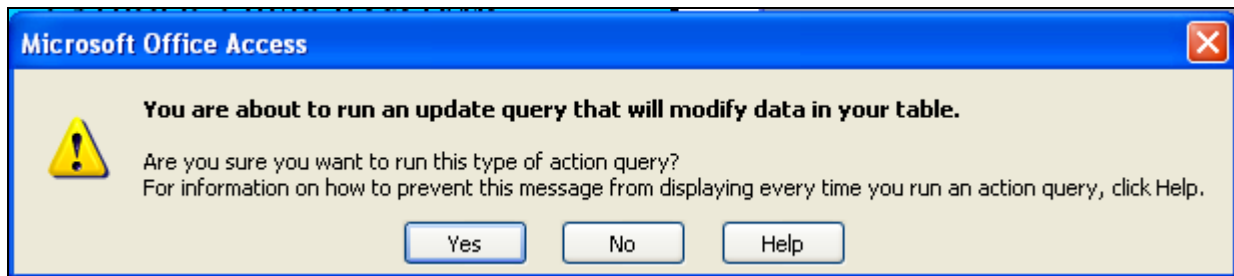
Press **Tab** or **Enter** to change fields.

Enter the **NEW Family Number** in **New:** field.

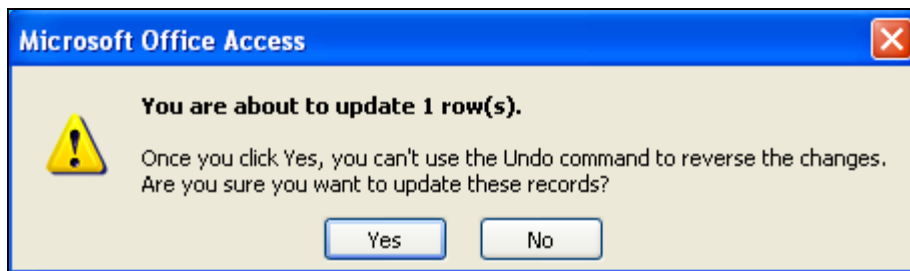
Press **OK**.

This message will appear. This is required, and is not an error message.

If you want to make the change, press **Yes**, otherwise, press **No** to cancel the change.



Pressing **Yes** will open the following message which is meant to confirm the change.



**BE SURE** that the message in the window reads “. . .update 1 row(s).”

If it says 0 rows, the change will not work. Press **No** and try again.

If it says more than 1 row, you have a different problem. Press **No** and try again.

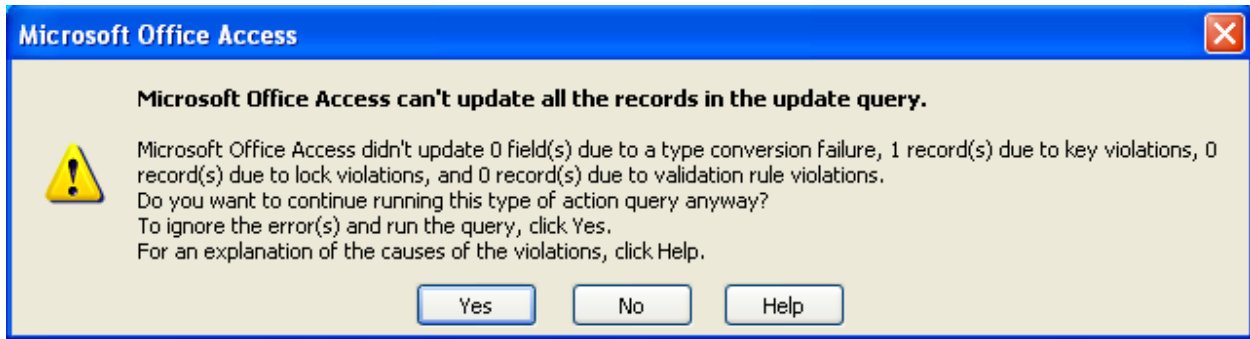
Should this occur again, contact our office for assistance.

Press **Yes** to complete the change.

**When the change is successful**, the Change Family Number box will again be on the screen with the fields blank. This is to allow you to make additional changes without having to open the screen each time. When you are finished making changes, press **Cancel** to clear the screen.

## **Error message – unsuccessful change**

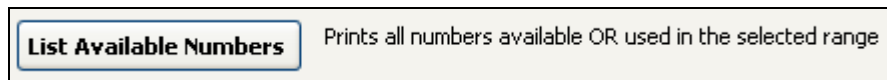
However, if the change is unsuccessful, in particular if the number chosen is already in use, you will open this screen:



Whether you press **Yes** or **No**, the screen clears, and the change does not happen. This is to prevent your data from being corrupted.

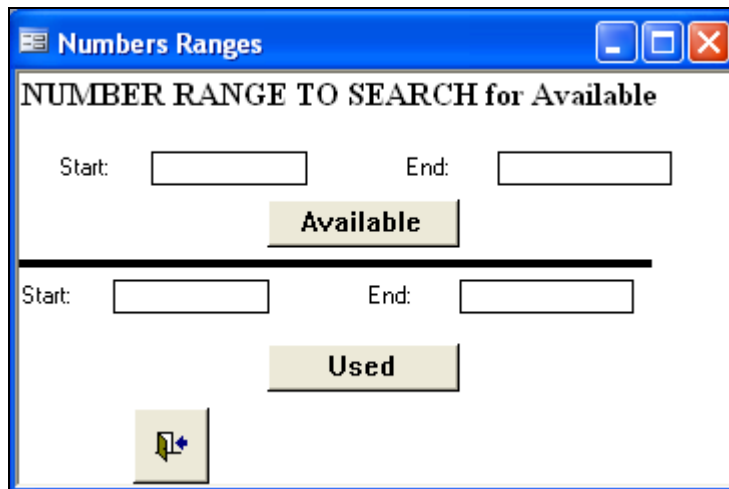
You now have to redo the change making sure you have an available number.

## List Available\Used Numbers



Ver. 2012

Clicking this button opens the following window:



Ver. 2012

To find **Available Numbers** enter a **Start** and **Stop** value in the appropriate boxes. Click **Available** and a report will appear on the screen.

To print this report, click the Printer icon at the top of the screen.



<b>Available Numbers</b>		
<b>Unused Family Numbers</b>		
1000	1024	1055
1001	1026	1056
1002	1027	1058
1003	1028	1059
1004	1029	1060
1005	1031	1062
1006	1032	1063

Ver. 2012

To find *Used Numbers* enter a Start and Stop value in the appropriate boxes.

Click **Used** and a report will appear on the screen.

To print this report, click the Printer icon at the top of the screen.

<b>Used Numbers</b>		
<b>Used Family Numbers between</b>	<b>1200</b>	<b>And 1300</b>
1203		
1221		
1254		
1271		
1296		
1298		

Ver. 2012

## Data Entry

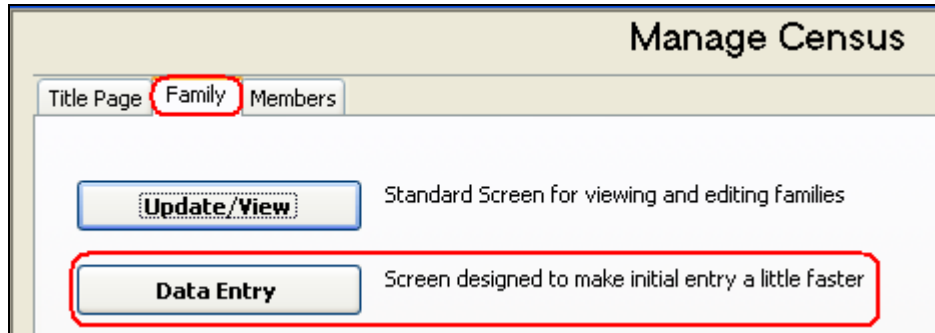
If you have a large amount of data to input, especially if you are just beginning to use this program, there is an entry port called Data Entry. This does not use multiple windows for inputting your data, but a two-window system where you can just scroll down to each field.

Click **Manage Census**



Ver. 2012

Select the Family tab



Ver. 2012

Click **Data Entry** to open the following window:

A screenshot of the "Family Record" form. The form has a blue header with the title "Family Record". Below the header, there is a "Find Family:" search box. The main content area is divided into two columns. The left column contains "Personal Information" fields: Family Name (Cascade), Secondary Name (Flood), Salutation (Mr & Mrs), Head of House (Ronald), Middle Initial (F), NickName (Ronnie), Suffix, Spouse's 1st Name (Tina), Approx Yr Joined (2000), Date Joined (2/5/2000), and Previous Parish (St. Joseph, Attleboro, VT). The right column contains "Address Information" fields: Street Name (Slave St.), Street Num (45), P.O. Box (Suite 4), City/Town (Hungary), State (MA), Zip Code (01195), Home Phone (555-999-0202), Business Phone (555-900-2099), Fax Number (666-999-0993), Home Communion (N), and Home Communion Minister. Below these fields are buttons for "Print Labels:" and "Last Update" (10/20/2009). At the bottom of the form, there is a "Family Information" section with a "Family Activity" dropdown menu (set to 200) and a "Delete Act." button. To the right of this section is a "RELIGIOUS EDUCATION - Family Information" box with fields for "# Children in Program" (0) and "Fee Paid" (\$0.00). At the bottom of the form, there are buttons for "Members:", "ADD FUNDS", and a refresh icon.

Ver. 2012

Although this feature resembles the regular input screens, it is fully functional. Notice that if some of the fields are missing, we are in the process of updating this feature. The major fields are included to allow you to get in the critical data quickly.

To get to the second page, click **Members**. This window opens:

**Members**

**Member Information**

<b>Family Number:</b>	1025
<b>Envelope #:</b>	2736

<b>First name:</b> <input type="text" value="Ronald"/>	<b>Cell Phone:</b> <input type="text" value="555-909-2233"/>
<b>MI:</b> <input type="text" value="T"/>	<b>E-Mail:</b> <input type="text" value="up@down.com"/>
<b>Last name:</b> <input type="text" value="Cascade"/>	
<b>Mem Suffix:</b> <input type="text"/>	
<b>Relationship:</b> <input type="text" value="Hu"/>	
<b>Date of Birth:</b> <input type="text" value="2/15/1985"/>	<b>City Of Birth:</b> <input type="text" value="Newton, MA"/>
<b>Religion:</b> <input type="text" value="C"/>	
<b>Maiden name:</b> <input type="text"/>	
<b>M/F:</b> <input type="text" value="M"/>	
<b>Reg:</b> <input type="text" value="Y"/>	
<b>Baptized:</b> <input type="text" value="Y"/>	<b>Bap Book:</b> <input type="text" value="h"/>
	<b>Bap Page:</b> <input type="text" value="h"/>
<b>bap mm:</b> <input type="text" value="03"/>	<b>Bap DD:</b> <input type="text" value="20"/>
	<b>Bap yr:</b> <input type="text" value="1985"/>
<b>Bap Church Num:</b> <input type="text" value="Holy Family Church"/>	<b>Bap City:</b> <input type="text" value="Holyoke, MA"/>
	<b>Bap Church:</b> <input type="text" value="Holy Family Church"/>
<b>First communion:</b> <input type="text" value="y"/>	<b>Comm Book:</b> <input type="text" value="k"/>
	<b>Comm Page:</b> <input type="text" value="k"/>
<b>comm mm:</b> <input type="text" value="6"/>	<b>Comm dd:</b> <input type="text" value="8"/>
	<b>Comm Yr:</b> <input type="text" value="1989"/>
<b>Comm Church Num:</b> <input type="text" value="St. Adalbert Churc"/>	<b>Comm City:</b> <input type="text" value="Bondsville, MA"/>
	<b>Comm Church:</b> <input type="text" value="St. Adalbert Church"/>
<b>Confirmed:</b> <input type="text" value="Y"/>	<b>Con Book:</b> <input type="text" value="k"/>
	<b>Con Page:</b> <input type="text" value="k"/>
<b>con mm:</b> <input type="text" value="5"/>	<b>Con dd:</b> <input type="text" value="20"/>
	<b>Con Yr:</b> <input type="text" value="1998"/>
<b>Con Church Num:</b> <input type="text" value="Notre Dame Churc"/>	<b>Con City:</b> <input type="text" value="Pittsfield, MA"/>
	<b>Con Church:</b> <input type="text" value="Notre Dame Church"/>
<b>Marital status:</b> <input type="text" value="m"/>	<b>Mar Book:</b> <input type="text" value="k"/>
	<b>Mar Page:</b> <input type="text" value="k"/>
<b>Mar DD:</b> <input type="text" value="6"/>	<b>mar mm:</b> <input type="text" value="16"/>
	<b>Mar Yr:</b> <input type="text" value="2000"/>

Ver. 2012

This is the top half of the entry screen for members. To speed up data entry, all the fields are listed on a single page instead of separate pages. This example shows the top half of the page, the lower half is shown below.

Mar Church:	<input type="text"/>	Mar City:	<input type="text" value="u"/>	Mar Church Num:	<input type="text" value="0"/>
Marriage_Town:	<input type="text" value="lll"/>				
Married by priest:	<input type="text" value="y"/>	Attend mass:	<input type="text" value="F"/>		
Occupation/School:	<input type="text" value="Fireman"/>				
Choose Handicap:	<input type="text" value="Needs Oxygen"/>				
Occupation/Company:	<input type="text" value="erty"/>				
Language Proficiency:	<input type="text" value="English"/>	Secondary Language:	<input type="text" value="French"/>		
CCD Grade:	<input type="text" value="0"/>	CCD Section:	<input type="text" value="p"/>	CCD Handicaped:	<input type="text" value="n"/>
CCD Room:	<input type="text" value="66"/>	CCD-t:	<input type="text" value="N"/>	CCD Section-t:	<input type="text"/>
CCD:	<input type="text" value="N"/>	CCD Room-t:	<input type="text"/>	CCD Grade-t:	<input type="text" value="0"/>
Prev Rel Ed:	<input type="text" value="No"/>	Catholic School:	<input type="text" value="Other"/>		
Pre Rel Ed Church:	<input type="text" value="q"/>	CCD Special Needs desc:	<input type="text" value="g"/>		
Pre Rel Ed city:	<input type="text" value="q"/>	Rel Ed Home Class:	<input type="text" value="No"/>		
Pre Rel Ed Grade Compl:	<input type="text" value="q"/>	CCD Fund Number:	<input type="text" value="g"/>		
Rel Ed Emg Name:	<input type="text" value="q"/>	CCD Home Class:	<input type="text" value="g"/>		
Rel Ed Emg Phone:	<input type="text" value="q"/>	CCD Home Class phone:	<input type="text" value="g"/>		
Rel Ed Second Contact:	<input type="text" value="q"/>	ConfClass:	<input type="checkbox"/>	ConfSponFormRecd:	<input type="checkbox"/>
REI Ed Sec Relationship:	<input type="text" value="q"/>	ConfSponsor1:	<input type="text"/>		
Rel ED Sec Street:	<input type="text" value="ty"/>	ConfSpon1Note:	<input type="text"/>		
Rel Ed Sec City:	<input type="text" value="yt"/>	ConfSpon1Verified:	<input type="checkbox"/>		
Rel Ed Sec State:	<input type="text" value="rt"/>	ConfSponsor2:	<input type="text"/>		
Rel Ed sec Zip:	<input type="text" value="45666"/>	ConfSpon2Note:	<input type="text"/>		
REI Ed Sec Phone:	<input type="text" value="5559997898"/>	ConfSpon2Verified:	<input type="checkbox"/>		
ConfName:	<input type="text" value="n"/>	ConfNameForm Recd:	<input type="checkbox"/>		
ConfBishopName:	<input type="text" value="n"/>	Age:	<input type="text" value="24"/>		
Handicapped:	<input type="text"/>				
comment:	<input type="text"/>				

Ver. 2012

All the critical information for this member is on this screen. To navigate this page, you can either use the Tab key or the Enter key. There is an **Exit** button at the bottom of this screen. This will bring you back to the first screen.



Ver. 2012

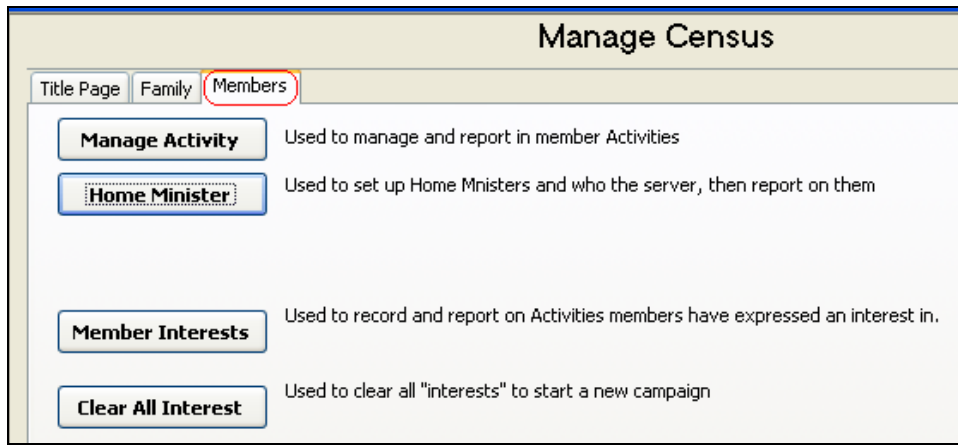
**IMPORTANT NOTE:** Once you have completed working in this section, especially if you have entered **NEW** families, you **MUST** press the **ADD FUNDS** button. You only need to press it once at the end of your session. Should you fail to complete this step and find Fund information missing, you can return to this page and press **Add Funds** again.

<input type="button" value="Members"/>	<input type="button" value="ADD FUNDS"/>	<input type="button" value="Exit"/>
--	--	-------------------------------------

Ver. 2012

## Members Tab

Clicking the Members Tab opens this menu:

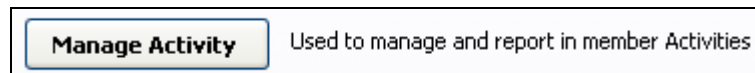


Ver. 2012

This section will assist you in managing data pertaining to individual members. The utilities included here have very powerful capabilities allowing a great deal of flexibility for your parish.

### Manage Activity

Member Activities is anything that an individual can participate in including ministries such as lector, choir, etc. These activities are found in the Table Update section (see Table of Contents of this manual to direct you to this section).

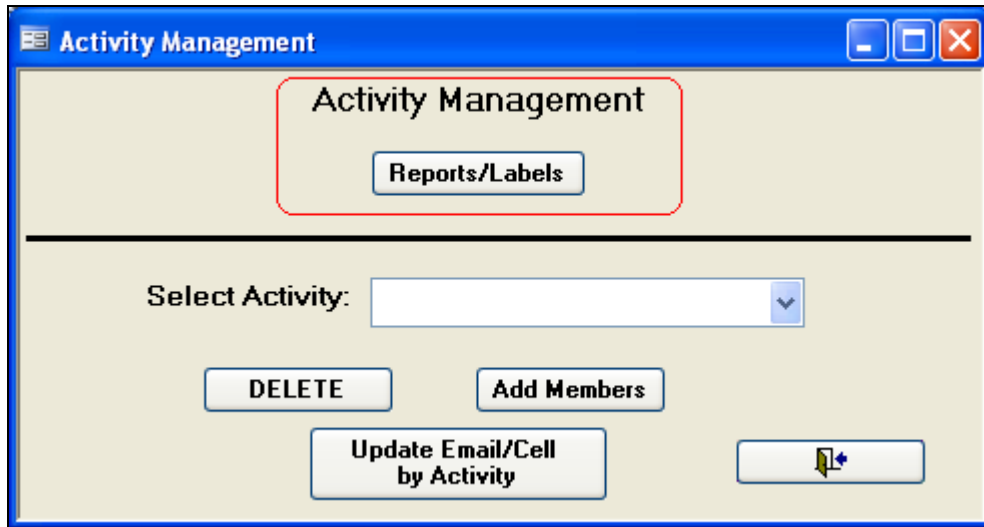


Ver. 2012

**Note:**  
**Before using any reports or labels  
there must be members with Activities.**

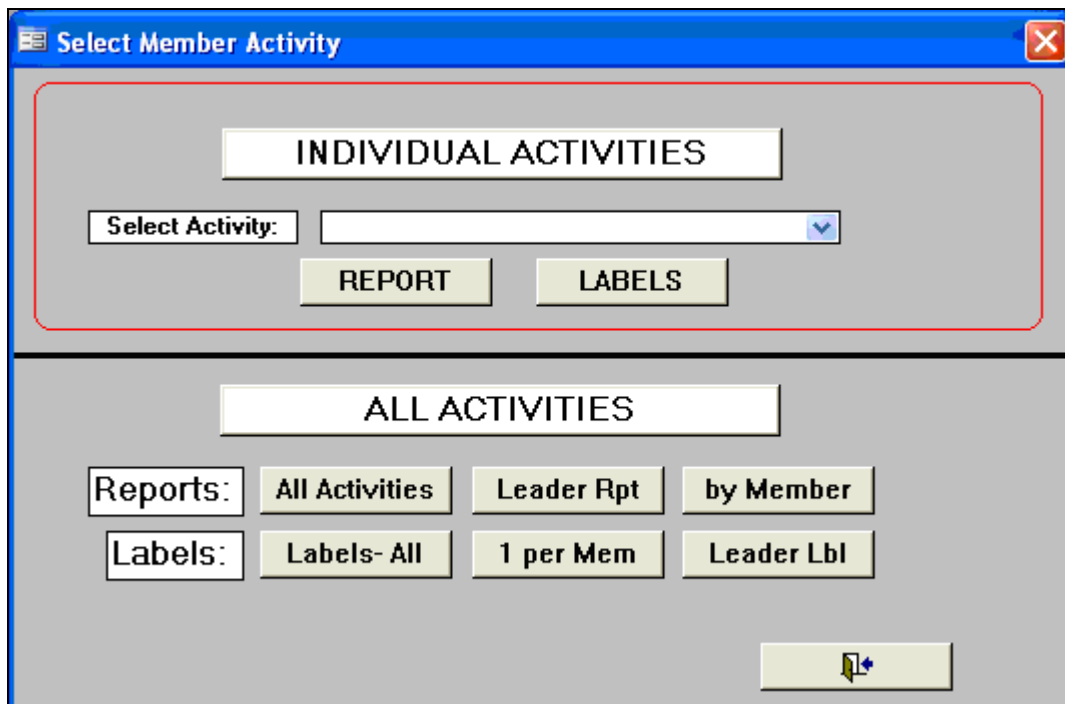
Clicking this button opens the following window:

## Activity Management



Ver. 2012

Select the **Activity Management: Report/Labels** button will open this screen:



Ver. 2012

## Individual Activities

Under **Individual Activities**, select any activity that appears in your Activity table (see Table Updates – Activity). Once you select an activity, you can obtain either a report or a sheet of labels for that activity.

Ver. 2012

Ver. 2012

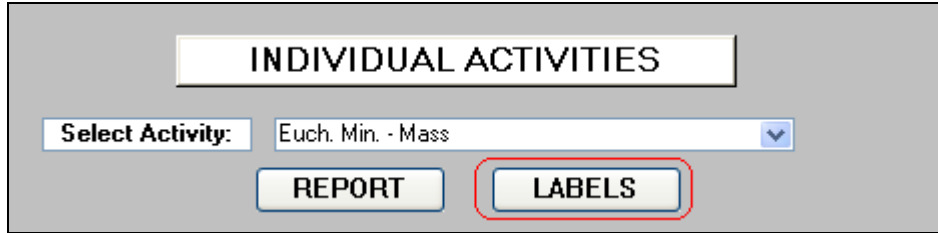
### Sample report for *Eucharistic Ministers: Mass*

St. Columkille Parish 1400 Saint Jude Ln. Southbridge, MA 11544							
<b>Member Activity Roster</b>							
01-Feb-07		<b>Euch. Min. - Mass</b>					
Leader	Title	Name	Address	Home Phone	Unl	Cell Phone	E-Mail
<input type="checkbox"/>		<i>Harold Badd</i>	186 Cranberry Ln. Mytown, MA 11025	413-555-1212	N	413-555-1212	Me@Me.com
<input type="checkbox"/>		<i>Thomas Cream</i>	85 Walnut St. Leeville, MA 03313	413-555-1212	N	413-555-1212	Me@Me.com
<input type="checkbox"/>		<i>Mary Cream</i>	85 Walnut St. Leeville, MA 03313	413-555-1212	N	413-555-1212	Me@Me.com
<input checked="" type="checkbox"/>	Contact Person	<i>Erica Waterman</i>	8 Adams St. Mytown, MA 11025	413-555-1212	N	413-555-1212	Me@Me.com

Ver. 2012

Notice the report is in landscape format; the selected ministry is in the header, and the Contact Person is identified.

Since this is only sample data, the phone numbers and e-mail addresses are the same. In an actual report, correct information will appear.



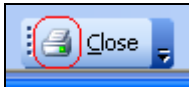
Ver. 2012

Clicking **Labels** button opens this screen.

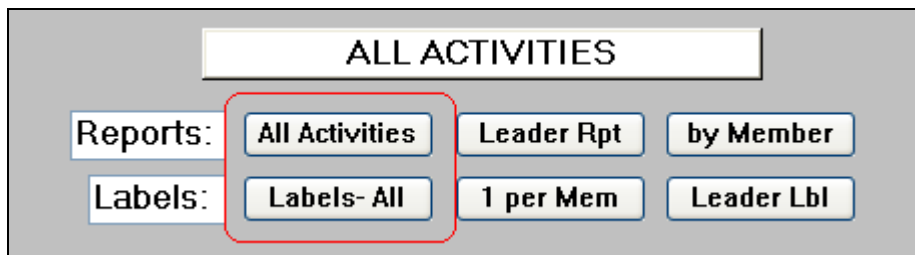
Thomas M Cream Jr. 85 Walnut St. Leeville, MA 03313	Thomas C Cream 85 Walnut St. Leeville, MA 03313	Mary D Cream 85 Walnut St. Leeville, MA 03313
Erica Wateman 8 Adams St. MyTown, MA 11025		

Ver. 2012

Clicking the **Printer** icon will print the labels.  
Clicking **Close** will close the screen.



### All Activities/Labels:



Ver. 2012



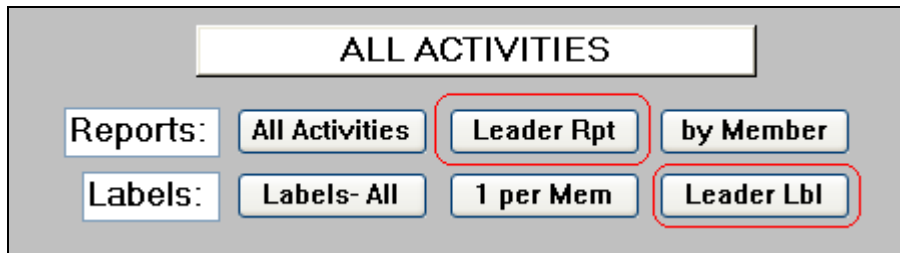
Clicking **All Activities** gives you a continuous report, in landscape format, listing each activity with its membership. Below is shown a partial report:

Activity Summary							
<i>Adult Altar Server</i>							
Title / Leader	Name	Address	Town	Home Phone	Unlisted	Cell Phone	E-Mail
Senior server	<input checked="" type="checkbox"/> Dorman, James	2 Cliff Dr.	Your Town	413-555-1212	n	413-555-1212	Me@Me.com
<i>Bible Study</i>							
Title / Leader	Name	Address	Town	Home Phone	Unlisted	Cell Phone	E-Mail
Coordinator	<input checked="" type="checkbox"/> Badd, Paula R.	186 Cranberry Ln.	MyTown	413-555-1212	N	413-555-1212	Adventureousone@verizon.net
<i>Euch. Min. - Home</i>							
Title / Leader	Name	Address	Town	Home Phone	Unlisted	Cell Phone	E-Mail
	<input type="checkbox"/> Adams, James	8 Church St.	Your Town	413-444-2323	N	413-555-1212	Me@Me.com
	<input checked="" type="checkbox"/> Alden, Wayne	93 Gail St.	Your Town	413-555-1212	Y	413-555-1212	Me@Me.com

Ver. 2012

Clicking **Labels – All** gives you a label sheet for each member. The labels are shown on the screen, where you can review, then print them.

## Leaders Report/Labels



Ver. 2012

Clicking on **Leader Rpt** gives you a complete listing of activities that have designated leaders. Shown is a sample report:

Activity Leaders								
Activity	Family Number	Name	Address	Home Phone	Unl	Cell Phone	E Mail	Title
Euch. Min. - Home	3009	Wayne Alden	93 Gail St. Your Town, MA	413-555-1212	Y	413-555-1212	Me@Me.com	
Women's Club	3204	Paula R Badd	186 Cranberry Ln. MyTown, MA	413-555-1212	N	413-555-1212	Adventureousone@verizon.net	President
Bible Study	3204	Paula R Badd	186 Cranberry Ln. MyTown, MA	413-555-1212	N	413-555-1212	Adventureousone@verizon.net	Coordinator
Parish Council	1398	Tim dthy W Begine	61 Easy St. MyTown, MA	413-555-1212	N	413-555-1212	Me@Me.com	Chairman
Lector	3240	Thomas M Cream Jr.	85 Walnut St. Leeville, MA	413-555-1212	N	413-555-1212	Me@Me.com	Contact Person
Men's Club	3240	Thomas C Cream	85 Walnut St. Leeville, MA	413-555-1212	N	413-555-1212	Me@Me.com	Chairman
Adult Altar Server	5362	James Dorman	2 Cliff Dr. Your Town, MA	413-555-1212	n	413-555-1212	Me@Me.com	Senior server
Youth Group	1030	Linda Gingers	61 Walnut St. Your Town, MA	413-555-1212	N	413-555-1212	Me@Me.com	Team Leader
Euch. Min. - Mass	2364	Erica Waterman	8 Adams St. MyTown, MA	413-555-1212	N	413-555-1212	Me@Me.com	Contact Person

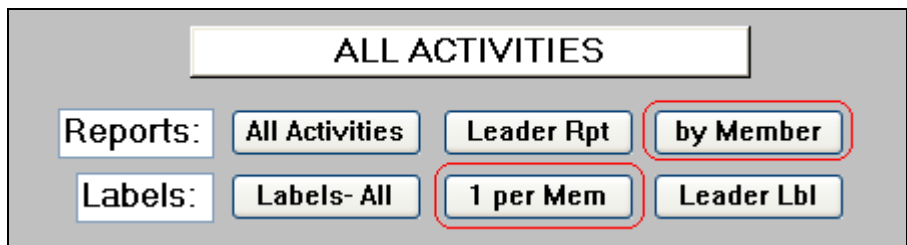
Ver. 2012



Clicking on “**Leader Lbl**” button gives you a label sheet with a label for each leader. If a person is leader for more than one activity, their name *will appear* more than once. The labels are shown on the screen, where you can review, then print them.

Since the labels are standard format, they are not shown here.

## Member Rosters/Labels



Ver. 2012

Clicking **by Member** opens a report that lists **ALL** activities that an individual has joined. Below is a sample report:

<i>Member Activity</i>	
Adams , James	Gingers , Linda
Euch. Min. - Home	Youth Group
Euch. Min. - Mass	Nickerson , Benjamin J
Alden , Wayne	Youth Group
Euch. Min. - Home	Nickerson , M. Grant
Badd , Harold F	Youth Group
Euch. Min. - Mass	Wateman , Erica
Badd , Paula R	Euch. Min. - Mass
Women's Club	
Bible Study	

Ver. 2012

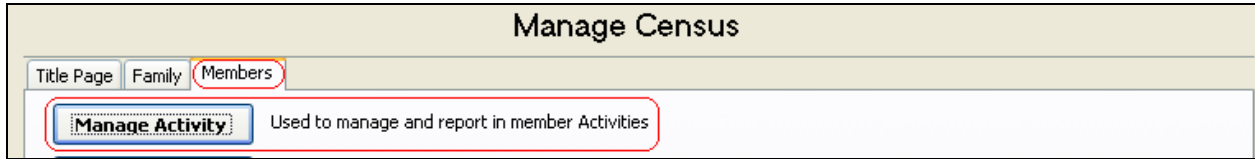


By clicking “**1 per Mem**” button you will receive only **ONE LABEL** for each member, regardless of how many activities they are in.

Since the labels are standard format, they are not shown here.

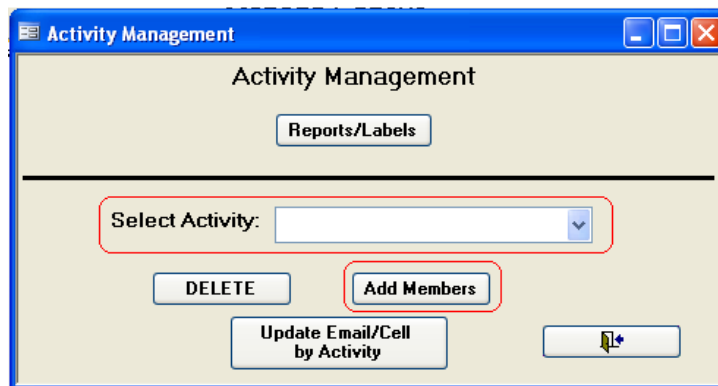
## Add Members

Return to the Tab screen and open Manage Activity



Ver. 2012

Clicking this button opens the following window:



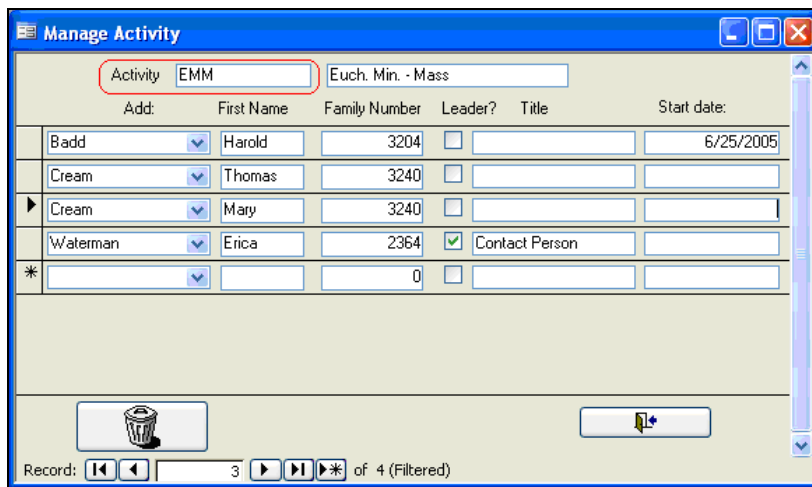
Ver. 2012

First, select an activity from the drop-down list.

For this example, we will select "Euch. Min. – Mass"

Second, click **Add Members**.

This screen will open:

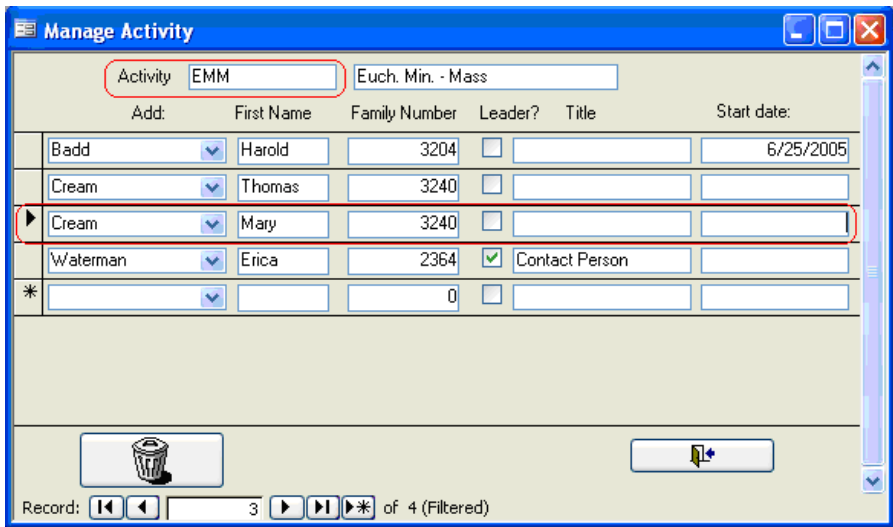


Ver. 2012

Notice the **Activity Code** is shown at the top of the window, plus the name of the activity.

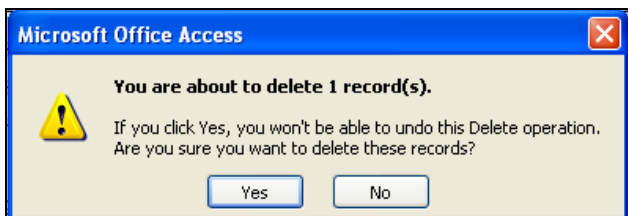
**To add members:** Add member's names using the drop-down list.

Once selected, the **First Name** and **Family Number** fields will be filled in for you. You can add the **START DATE** for each person (for when they joined), and designate a leader or co-leaders, and assign them a title of your choosing.



Ver. 2012

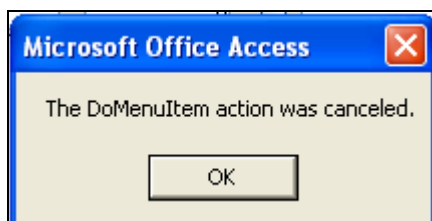
**To delete a person:** select their line (click with mouse) then press the trash can. You will be asked to confirm the deletion.



Ver. 2012

Choose **Yes** or **No**.

Should you choose **No**, another dialog box appears:



Ver. 2012

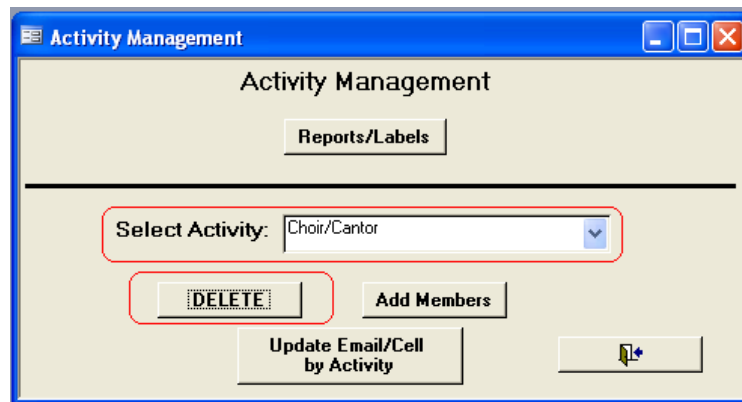
Click to clear it. You will see some members names are now missing.

**DO NOT PANIC.** Exit the screen and open it again. All your data is returned to the screen unharmed.

Should you choose **Yes**, the name is deleted. There is no dialog box to validate the change.

## Delete (all members)

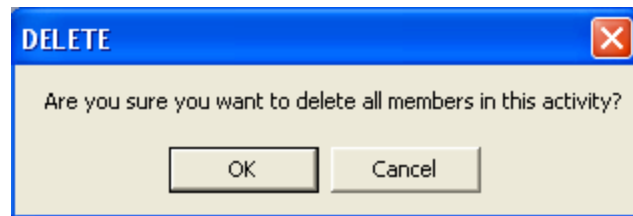
Returning to the activity management screen, you can delete the entire membership from a selected activity:



Ver. 2012

In this case, you will delete **ALL** members of the Choir/Cantor activity. Select the desired activity, and then press the **Delete** button.

The following screen will appear:

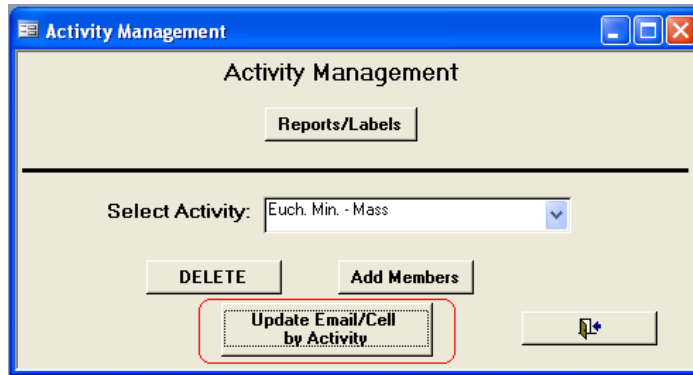


Ver. 2012

Clicking **OK** will clear the members. **Cancel** will clear the above box, and no action is taken.

## Update Email/Cell by Activity

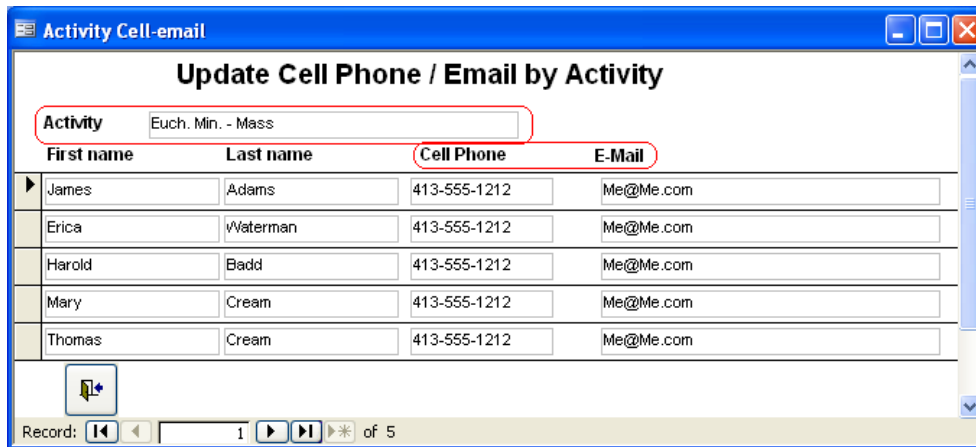
Allows you to quickly update the email addresses and/or cell phone numbers of all members of a selected activity,



Ver. 2012

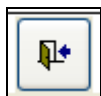
Select the activity you want to update from the drop-down list.  
Click the **Update** button.

This screen will appear:



Ver. 2012

All the members of this activity will be shown. You can easily update the member information from this screen by clicking in the field and making the correction.

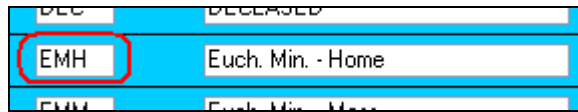


Click this button to close the window.

## Minister Management

This function tracks Eucharistic Ministers who visit homes and/or hospitals and the people they serve.

**Set-up:** For this function to work properly, you must place the **CODE** for Home Ministers from the **Manage Census > Family tab > Table Update > Activity** table (see below)



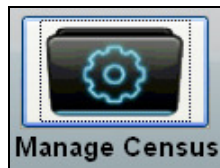
Ver. 2012

and place it on the **Parish Info** screen as shown below:

<b>Diocese Name:</b>	Diocese of Fall River
<b>Home Minister Code:</b>	EMH
<b>Home Parish</b>	St. Columkille Parish

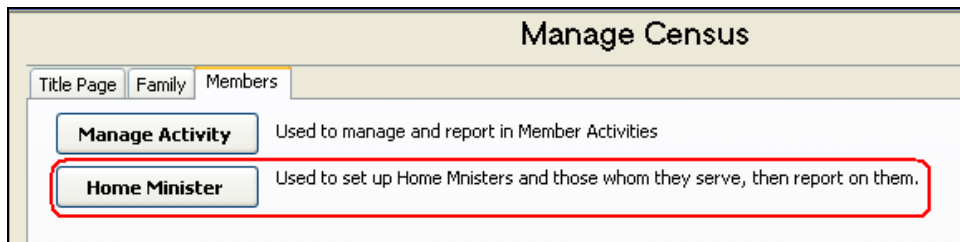
Ver. 2012

Close all windows and return to the main menu, then  
Click on this button:



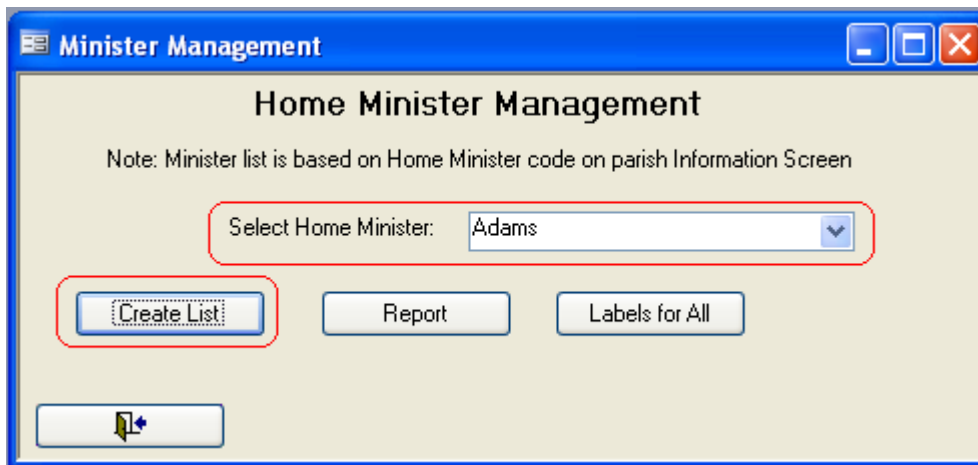
Ver. 2012

This window will open:



Ver. 2012

From the Members tab select Home Minister to open the following window:

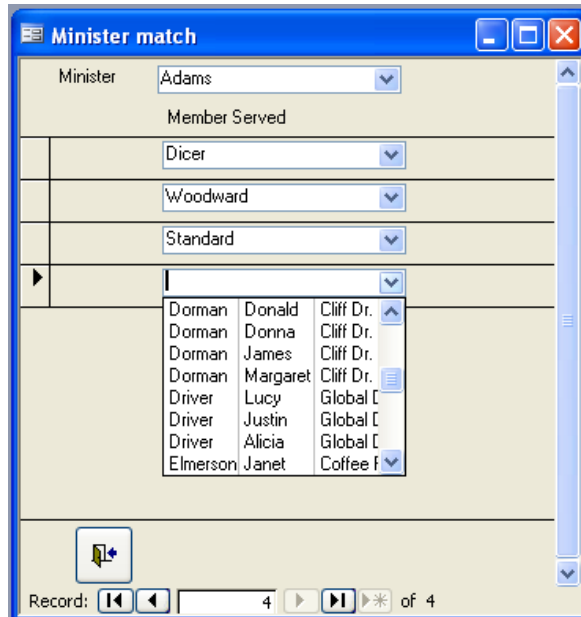


Ver. 2012

In this case, we will look at Mr. Adams and the people he is serving. You **MUST** select a name before *Creating List* or *Report*.

## Create List

Click **Create List** to open this window:



Ver. 2012

Notice the minister's name at the top. Three parishioners' names are already selected, and the drop-down is open (by you) to make the next selection. There is no limit to the number of names you can select.

## Report



Ver. 2012



Select a minister's name and click **Report** to see this report:

St. Columkille Parish 1400 Saint Jude Ln. Southbridge, MA 11544				
<i>Home Minister Report</i>				
<i>Name</i>	<i>Street</i>	<i>Town</i>	<i>Home Phone</i>	
Alden Wayne				
Addition, Josephine	582 Cranberry Ln. Apt. 5J	MyTown, MA 11025	413-555-1212	
King, Jake	30 Southern View	Your Town, MA 22022	413-555-1212	
Lawler, Christina	54 Berry Patch	Your Town, MA 22022	413-555-1212	

Ver. 2012

The minister's name appears at the top, followed by the people he serves.

## Labels for All



Ver. 2012

Selecting **Labels for All** gives you a full listing of all parishioners who are receiving Home Communion from all ministers.

Label pages display on screen, from there you can print them.  
Since the labels are in standard format, they are not shown here.

## Member Interests

Member Interests is a function that allows you to enter and track the names of parishioners who are interested in a particular ministry or activity.

## Entering Member Interests

The screenshot displays a web application interface for entering member information. At the top, there are navigation tabs for 'Members', 'SACRAMENT', and 'RELIGIOUS ED.'. Below this is a 'Member Information' section with the following fields:

- Family number: 5027
- Member Num: 2316
- First Name: Christine
- MI: [empty]
- Middle Name: [empty]
- Last Name: Browns
- Suffix: [empty]
- Relationship: W
- Registered: N
- Cell Phone: 413-555-1212
- Maiden name: Rome
- M/F: F
- E-Mail: Me@Me.com
- Religion: LU
- Date of Birth: 9/9/1963 46
- Language Proficiency: [empty]
- City Of Birth: X
- Secondary Language: [empty]
- Occupation/Company: Speech Therapist
- Temporary Address section with 'Print Label' checkbox and fields for 'Address Street' and 'City-State-Zip'.
- Handicapped: [empty]
- Date Deceased: [empty]
- Help button

Below the member information is the 'Activities and Interests' section, which is highlighted with a red box. It contains two columns:

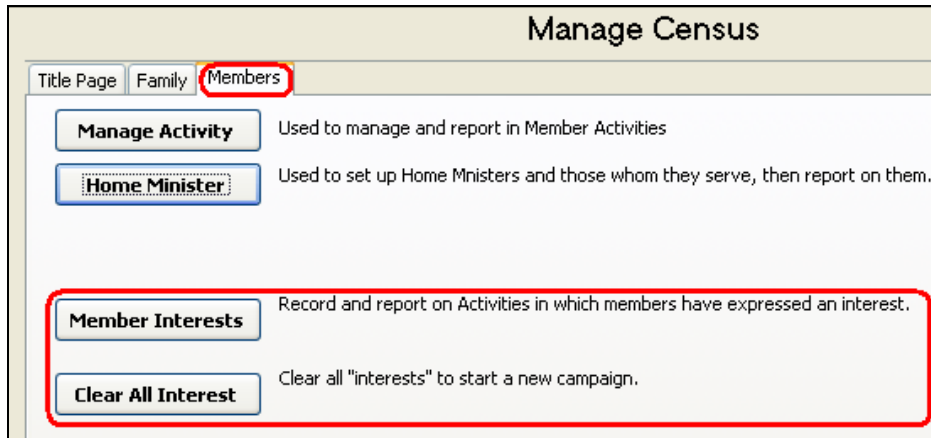
- Current Activities:** A drop-down menu with one entry.
- Interested In:** Two drop-down menus with entries 'BS' and 'C'.
- Buttons for 'Delete Act.' are located below each column.

Ver. 2012

On the Member screen, next to the **Current Activities** is **Interested In**. This section uses the same drop-down lists as the Current Activities. Simply drop the list and select the activity/ministry you need. There is no limit to the number of entries per member.

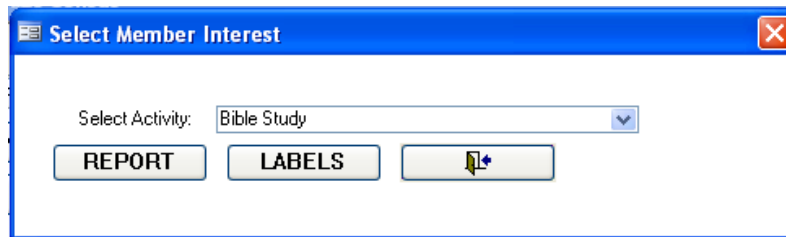
## Managing Member Interests

Once you have entries, you can create reports and generate labels from the Member Interests function.



Ver. 2012

. Select Member Interests to open this window:



Ver. 2012

From this window choose either Report or Labels. For this example Bible Study has been chosen.

## Reports

<b>St. Columkille Parish</b> <b>1400 Saint Jude Ln.</b> <b>Southbridge, MA 11544</b>				
<hr/>				
<b>Member Interested In</b>				
<i>13-Apr-10</i>		<b>Bible Study</b>		
<hr/>				
<b>Name</b>	<b>Address</b>	<b>Home Phone</b>	<b>Unlisted</b>	
<hr/>				
<i>Christine Browns</i>	38 Second St. MyTown, MA 11025	413-555-1212	N	
<i>Ronald Cascade</i>	45 Slave St. Suite 4 Hungary, MA 01195	555-999-0202	N	
<hr/>				
<b>Total Members 2</b>				

Ver. 2012

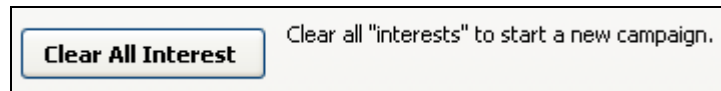
You must create a report for each activity as needed. There is no comprehensive report for all ministries.

## Labels

Selecting Labels will generate a label page for each activity as needed. Since the labels are standard format, there are no samples shown.

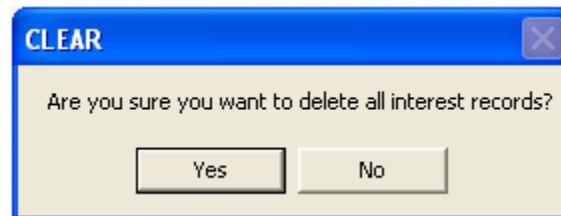
## Clear All Interests

Each year you may want to clear out all interests to begin a new round of acquiring volunteers.



Ver. 2012

Clicking this button (above) will open this window:



Ver. 2012

Choosing Yes will clear all Interests in the census system.  
Choosing No will end the command without clearing any records.