

FAQs from 2016 Winter Training

Topics Include

- Configuration
- Online Registration
 - Keywords
 - Data Clean Up
- Comprehensive Report

Parish Data System (PDS) - Church Office

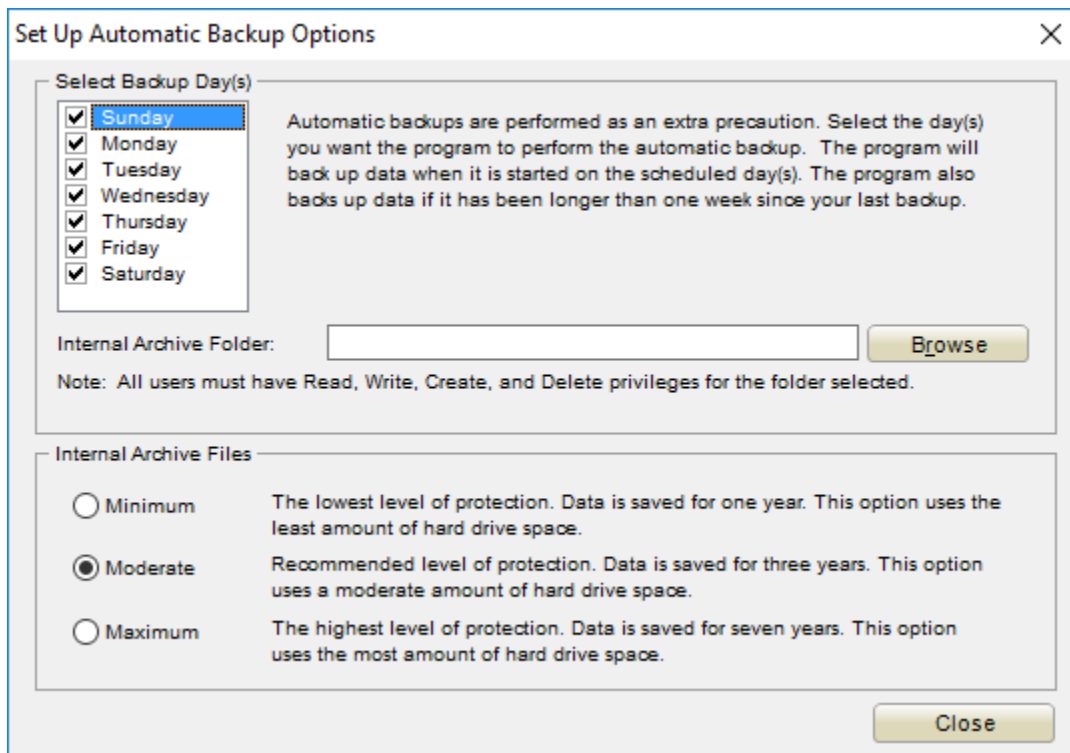
Archdiocese of Seattle

Q. How often should I back-up my PDS data? How?

A. We recommend that you have your PDS program set to automatically backup the first time a user opens the program daily. We also recommend that you do two manual backups to USB flash drives (hand held or external hard drive) at least once a week. Take one of these offsite and leave one on-site. Rotate these backups each time.

☒ To setup PDS to automatically backup your data daily, go to:

File | Backup/Restore | Backup Options. Set your back up to the following:



NOTE: The internal Archive Folder will be blank if it is pointed to the hard drive of the data serving computer. If available, it would be best practice to click the BROWSE button and store these backups on another computer on your network. This provides some redundancy in case your data server hard drive fails.

Q. How do I go about reprinting a batch?

A. You can reprint a batch using the following procedure if you know the batch number.

☒ To reprint a batch of contributions, go to:

Contributions | Reports | Listing Reports | One Line Posting Report by Batch Number

On the Funds to Print screen, be sure to enter a date range that would include all the items that were in the original batch. Also, include any fund numbers to which you posted.

On the Select the Families screen, be sure to include active and inactive families and then enter the batch number of the batch you're trying to re-print. In our example, the batch number is 1234:

Q. How do we advance the grade for all members once a year?

A. If you are trying to keep your grade level information accurate in Church Office, you'll need to run the grade advancement process once a year. We recommend the summertime as it's an easy time to remember to do this as the students are transitioning between grades at that time.

☒ To Advance Student Grades:

Do a manual backup by going to File | Backup/Restore | Backup Current Data

Then start the advancement process by selecting Members | Processes | Grade Promotion

Complete the screen like that shown here. This is a partial screen with the younger grades not showing, but this shows the Grade 12 students being promoted to HS Graduate and their relationship/type changing to Young Adult.

Promote From Grade	Promote To Grade	Change Type to Young Adult
4	5	<input type="checkbox"/>
5	6	<input type="checkbox"/>
6	7	<input type="checkbox"/>
7	8	<input type="checkbox"/>
8	9	<input type="checkbox"/>
9	10	<input type="checkbox"/>
10	11	<input type="checkbox"/>
11	12	<input type="checkbox"/>
X 12	HS Graduate	<input checked="" type="checkbox"/>

Q. What is the process for changing a child to young adult?

A. See the Grade Promotion FAQ above.

Q. If a contribution batch needs to be amended/edited, can you go into an existing batch or do you have to create a new one?

A. You can edit items that were posted by the Batch Quick Posting method by going to the individual Contribution screen for an individual family. Entries can be manually edited or removed directly on this screen. We recommend re-printing the batch report after making these changes.

You cannot ADD items to a batch that has already been posted. You would need to enter any new contributions under a different batch number.

Q. We did not do start dates when we entered our ministry information, can we modify these in a group process?

A. Yes, you can globally alter the start dates for your recently entered ministry information.

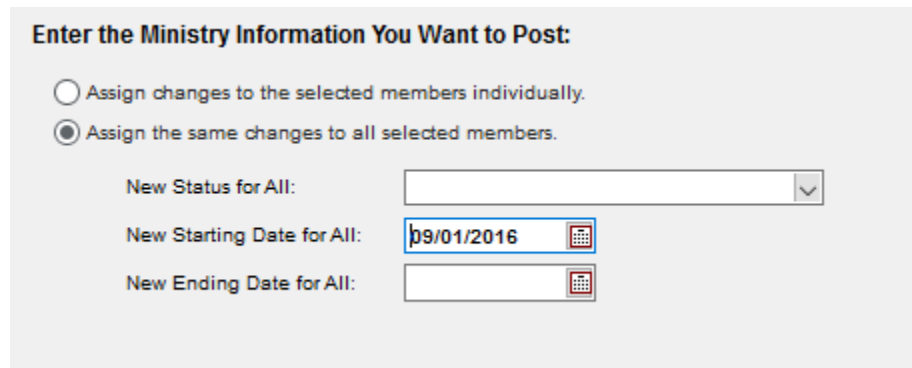
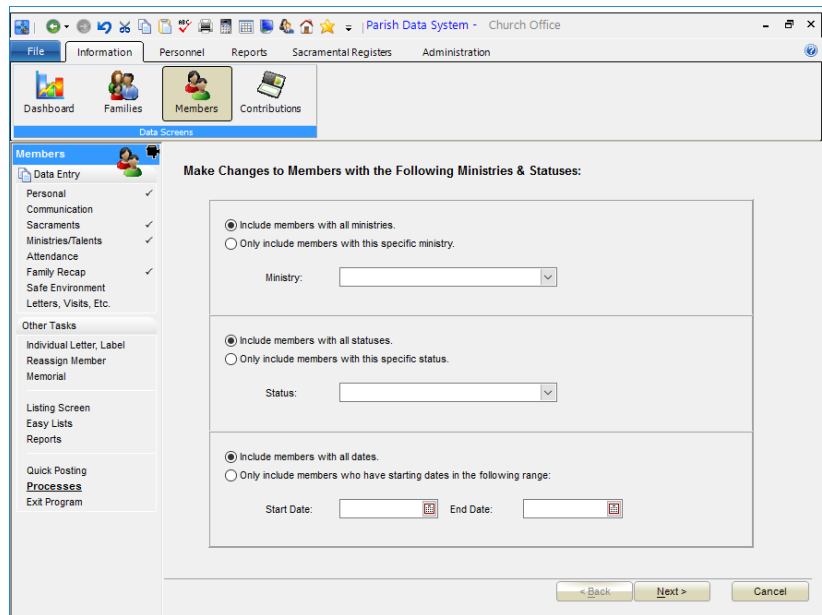
✕ To globally alter ministry information, go to:

Members | Processes | Change Ministries

If you want to change all the ministry information, leave the first screen as shown here –

Click NEXT and then on the second screen, leave the checkbox set for Post Changes for All Members and click NEXT again.

Then, check the box to Assign the same changes to all selected members and enter the Start Date information as shown here -

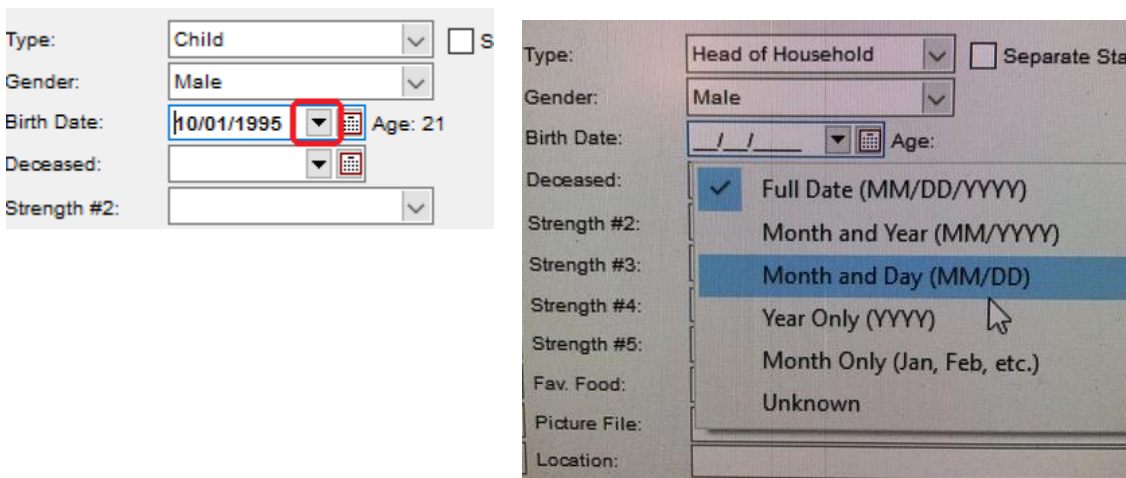


Q. How do we move an Adult child to their own family?

A. There is a Reassign Member button available on each MEMBER screen. Selecting this button will walk you thru the process of moving an individual member to a new family or to an existing family.

Q. Can you format the date of birth field to just collect year or month and year?

A. Most date fields in Church Office, version 7 and above allow you to modify the display for the date information. To the right of the date information, there is a pull-down arrow that allows you to select the following options:



Q. How do I merge duplicate families?

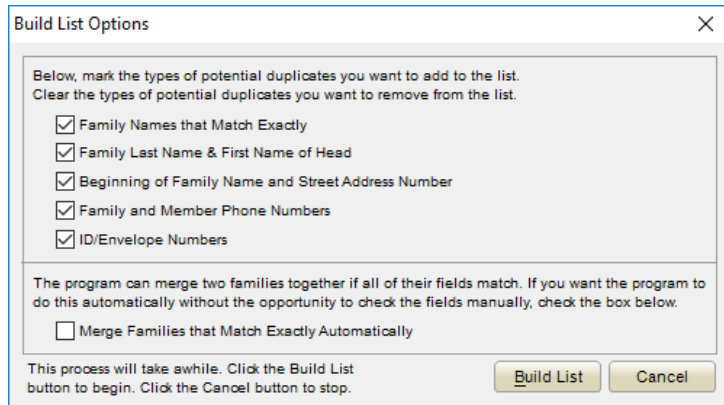
A. There is a process built-in to Church Office that helps search for and combine duplicate families and members.

☒ To Combine Families and/or Members:

Do a manual backup by going to File | Backup/Restore | Backup Current Data

Then, go to File | System Processes | Combine Families

The process will display the following options screen, that will help do an automatic search for duplicate families -



Build List Options

Below, mark the types of potential duplicates you want to add to the list. Clear the types of potential duplicates you want to remove from the list.

- Family Names that Match Exactly
- Family Last Name & First Name of Head
- Beginning of Family Name and Street Address Number
- Family and Member Phone Numbers
- ID/Envelope Numbers

The program can merge two families together if all of their fields match. If you want the program to do this automatically without the opportunity to check the fields manually, check the box below.

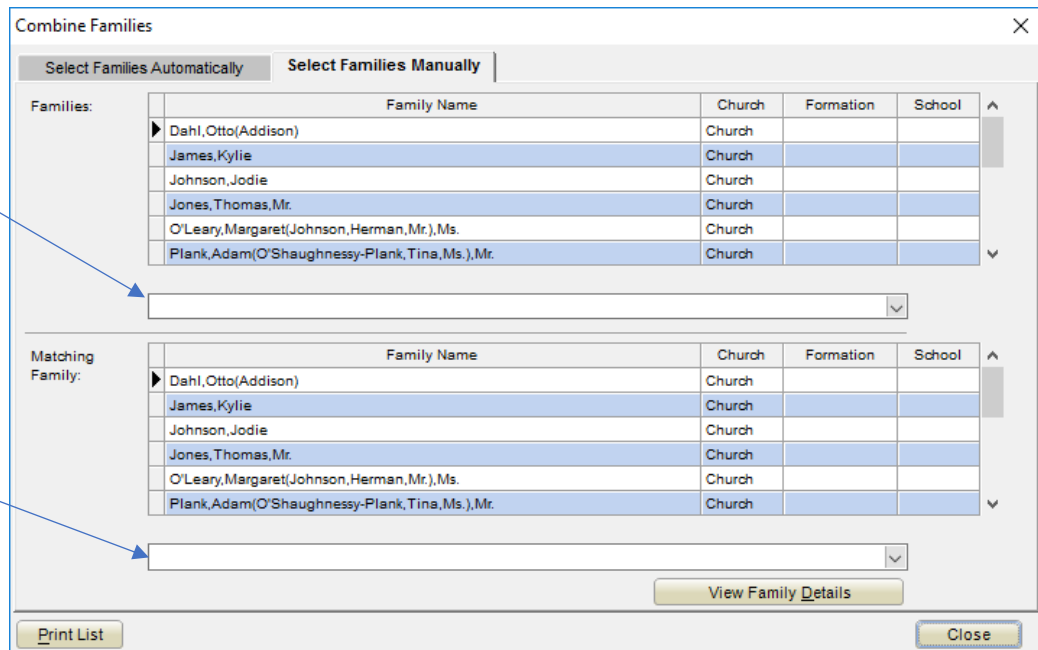
Merge Families that Match Exactly Automatically

This process will take awhile. Click the Build List button to begin. Click the Cancel button to stop.

Click BUILD LIST to continue. The system will display any matching families that are located. You can also click the MATCH FAMILIES MANUALLY tab at the top of the next screen:

Then, select a family in the top section here

Next, select the family that you want to combine them with here



Combine Families

Select Families Automatically | **Select Families Manually**

Families:

Family Name	Church	Formation	School
▶ Dahl, Otto(Addison)	Church		
James, Kylie	Church		
Johnson, Jodie	Church		
Jones, Thomas, Mr.	Church		
O'Leary, Margaret(Johnson, Herman, Mr.), Ms.	Church		
Plank, Adam(O'Shaughnessy-Plank, Tina, Ms.), Mr.	Church		

Matching Family:

Family Name	Church	Formation	School
▶ Dahl, Otto(Addison)	Church		
James, Kylie	Church		
Johnson, Jodie	Church		
Jones, Thomas, Mr.	Church		
O'Leary, Margaret(Johnson, Herman, Mr.), Ms.	Church		
Plank, Adam(O'Shaughnessy-Plank, Tina, Ms.), Mr.	Church		

Then, click VIEW FAMILY DETAILS to begin the process of selecting which field info from each family you want to retain. When you are satisfied with your selections, click COMBINE FAMILIES and then the process will show you the members in the family for you to decide how to bring the member records into alignment.

Q. How do we clean up our email lists? I want emails on the member communication screen instead of the family screen.

A. We recommend placing individual MEMBER emails on their respective MEMBER COMMUNICATION tab. This will allow you to send email to selected church members based on age, keyword, status, grade, language or any other identifier that you may wish to use.

ALSO be sure put an email on the FAMILY screen to enable you to email ENTIRE FAMILIES for parish updates, events etc.

Q. *How do I separate givers from non-givers?*

A. When running financial reports, you can use the following fields on the Additional Selections tab:

Fund Totals Grand Total Paid: This is the total paid for the funds selected for the date range selected. A selection of Fund Totals Grand Total Paid is greater than 0 would include only those families that have given money.

Fund Totals Grand Total Due: This is the total pledge due for the funds selected for the date range selected. A selection of Fund Totals Grand Total Due is greater than 0 would include only those families that have a pledge due.

Q. *What should we do when we get error reports?*

A. Periodically, PDS operations will result in an error message being displayed. Most of the time these will be 'Access Violations' of some type or another. In most cases, exiting the program and re-opening the program will resolve these. If you continually receive Access Violation errors on a specific computer, please contact Bryan Gummersall for assistance with resolving.

If you ever receive a 'Severe Error' or an 'Index Error', please notify Bryan Gummersall immediately, so that he can assist with troubleshooting and resolving the error. Please do not ignore this level of error message.

Q. *How to start a new fund year?*

A. There are two ways to start a new fund year in Church Office. The first one is thru PROCESSES, under Contributions. The second way is directly on the Fund Setup screen. Normally during Stewardship and Annual Appeal time, directions are provided for use of the New Year Fund Setup process.

✘ To Setup a New Fund Period for an existing fund:

Do a manual backup by going to File | Backup/Restore | Backup Current Data

Then, go to Contributions | Processes | New Year Fund Setup

The following are the typical selections for use during the Stewardship Campaign -

The screenshot shows the 'Parish Data System - Church Office' window. The 'Contributions' menu is active, and the 'New Year Fund Setup' screen is displayed. The screen title is 'This process creates a new fund period and sets up the new fund for families currently using the existing fund.' The 'Select the Fund to Process' dropdown is set to '1 Stewardship Contributions'. The 'Fund Number' is '1' and the 'Fund Name' is 'Stewardship Contributions'. The 'Date Range for the New Fund Period' is set from '01/01/2018' to '12/31/2018'. The 'Transfer Inactive Families' option is set to 'No'. The 'Transfer Current Billing Periods' option is also set to 'No'. The 'How to handle the Last Period' dropdown is set to 'Combine Two Oldest Fund Periods'. The 'Process' and 'Cancel' buttons are visible at the bottom right.

Q. How do I print letters and envelopes at the same time?

A. After printing letters or statements, go directly into the Envelopes/Labels section of the same report section where you did your letters. This is important, especially if you're running a financial letter and then envelopes, so that you can match the date range and funds that were selected. When running the labels, the program will allow you to skip labels for those families that might have been emailed instead of having a letter printed.

✘ On the Select Families screen, you can do the following:

The screenshot shows the 'Sortation' section of the 'Select Families' screen. The 'Sort Order' dropdown is set to 'ID Number'. The 'Skip the Label If Email:' section is highlighted with a red box. It contains two radio buttons: 'Preferred is Checked' (selected) and 'Has an Email Addr.' (unselected). Below this, there are three checkboxes: 'Include Family Relationship Courtesy Copies' (unchecked), 'Include Family Marked as Loose Collections' (unchecked), and 'Active / Inactive / Send No Mail Restrictions' (checked). The 'Active / Inactive / Send No Mail Restrictions' section contains three checkboxes: 'Include Active Families' (checked), 'Include Inactive Families' (unchecked), and 'Include Families Even If Send No Mail is Marked' (unchecked).

Q. Sort order on reports – by member name and by family name?

A. You can select the sort order on reports on the final page of the report process, prior to selecting PREVIEW. The sort options differ based upon whether you're running a Family, Member or Contribution report:

- ID/Envelope Number
- Name (either Family Last Name (FAMILY Reports) or Member Last Name (MEMBER Reports))
- Second ID (available only on Family Reports)
- Zip/Postal Code
- Geo Area (the geographical area field on the family screen)
- EZ Mail (only with use of the Cass It Add On module)

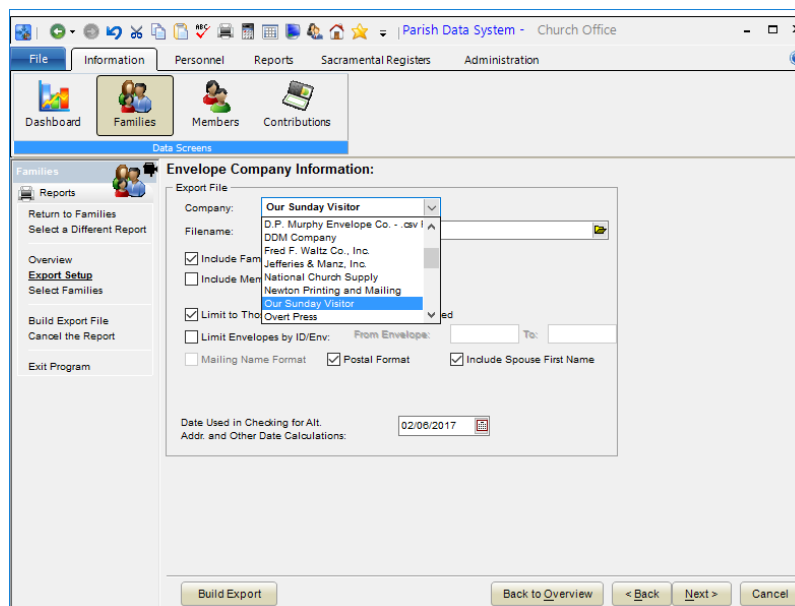
Q. How do I export my family list to our envelope company?

A. Church Office has the envelope export file creation process built into the reports section

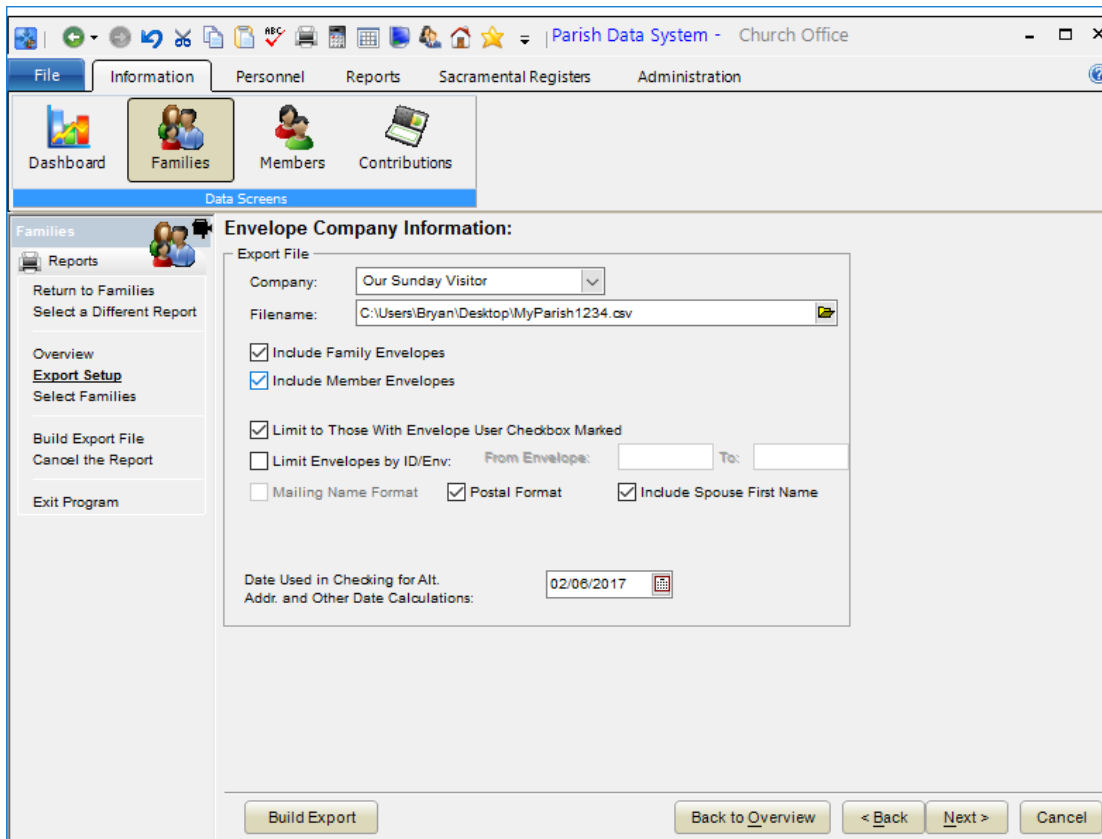
☒ To Create an Export File for Envelope Companies:

Go to Families | Reports | Data Exports/Envelope Companies | Export to Envelope Companies

Click NEXT until you get to the Envelope Company Information Screen. On the Company Field, click the pull-down arrow and select your Envelope Company:



Select the file location and give the file a name that includes your account number with your envelope company. Typical settings might look like this:



Q. What are the best practices for contribution posting?

A. We suggest that every donation made to your Church is entered in Church Office and credited to a specific family or in the case of loose cash, credited towards a family named 'Loose Cash'. This will ensure that the total of your contribution posting batch report(s) match(es) your weekly bank deposit.

For assistance with how to setup and use a 'Loose' Family, please contact Bryan Gummersall.

Q. How would we use Safe Environment? What reports are available in this section?

A. Church Office has a Safe Environment page available for every member in the Church. All the requirements for background checks and safe environment classes can be entered on this page. Several reports are available related to this information by selecting Members | Reports | Listing Reports:

- Member Background History
- Member Other Requirement History
- Background Check Fulfillment Table
- Other Requirements Fulfillment Table
- Safe Environment Fulfillment Table

Q. Can we get procedures for changing from ID # ranges to use the Family Status field?

A. We are compiling instructions and resources to assist with this project. These resources should be available soon.

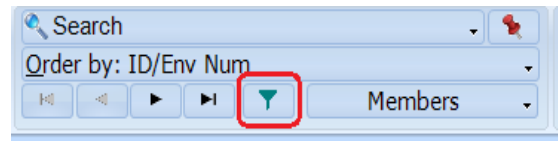
Q. How do I set different permission levels for user access?

A. You can setup users and permissions by going to Administration | Users and Passwords. You can then search for the user that you want to modify and then set three levels of access for each area/screen in the programs:

- No Access (Can't see this section/information)
- View Only Access (You can see, but not alter information on this screen)
- All Access (You can view and alter all information on this screen)

Q. How can I hide the inactive families but still be able to look at their information when needed?

A. When running reports, inactive families or members are typically not selected. When viewing family or member screens, inactive families or members will show up with their names in red. In version 8, you can filter out the inactive families or members by using the filter icon.



Q. What are the best ways to quickly input sacramental records?

A. In some cases, the Church performs sacraments for multiple parishioners on the same day and time. All the information is the same, except for the individual parishioners receiving the sacrament. The Church Office program has a Quick Posting process built in for posting any of the sacraments for multiple participants.

☒ To Quick Post Sacramental Data:

Go to Members | Quick Posting | Dates

Select Individual Entry Method, unless you have some Additional Selection criteria that you can use to select a class. Click NEXT to continue

Enter the information that will apply to all participants receiving the sacrament:

Enter the Date Information You Want to Post:

Date Name:

Date:

Status: Additional Status:

Performed by:

Place:

Address:

Start Every Page with Entry Number 1

Profession of Faith

Verified

Certificate on File

Current Volume:

Current Page:

Current Entry:

Entries Per Page:

Then, enter or select the first member, add any sponsor information and then click Add Member to the List:

Select a Member:

Member Name:

Family Name: James, Kylie

Address: 444 88th Street NE

Relationship: Age: 0

Current Date Info:

Volume:

Page:

Entry:

Extra Information:

Sponsors/Witnesses

Sponsor/Witness Name	Type	Address

Continue to select other individuals, clicking Add Member to List each time.

When finished entering individuals, click Next twice and then FINISH to complete the process. During that process, you'll have the option to print a batch report of all the information that you entered.

Q. How do we use the Relationships page to connect different families?

A. Each family and/or member in a family can be connected to other families in your database. This might be helpful to keep track of multiple generation families, divorced families, cousins and siblings.

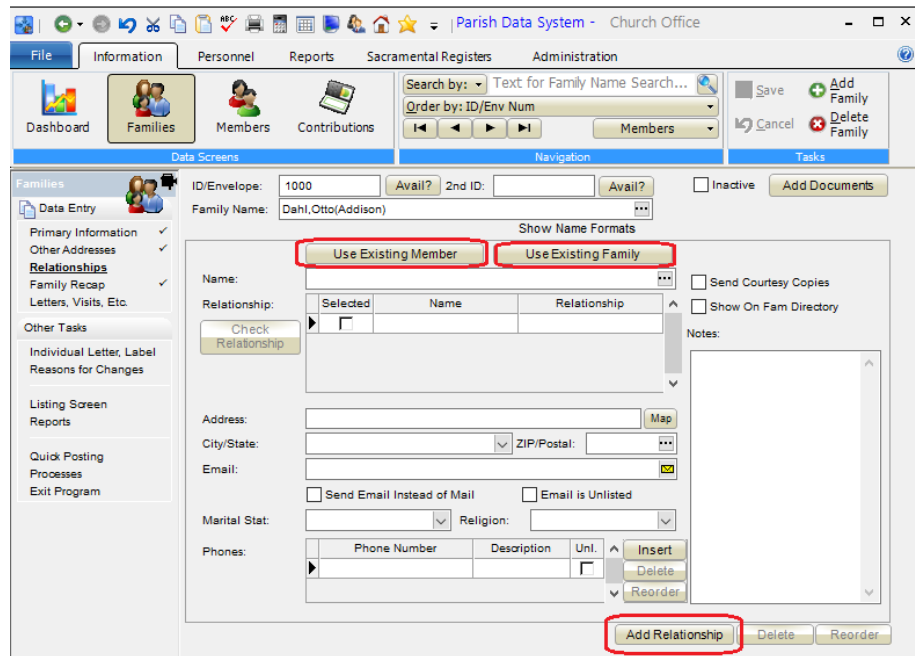
To track Relationships:

Go to Families | Click on the Relationships menu item on the left side of the window.

Members | Quick Posting | Dates

Click one of the three buttons identified below:

- **Use Existing Member** to connect members within this family to other members in this family
- **Use Existing Family** to connect this family or members in this family to other families/members within your parish database.
- Use **Add Relationship** to add a connection with a family or member in this family to a family or individual that is not in your current database.



A completed relationship setup for a Grandfather that is not a member of your current database might look like this:

