

Pastoral Care 12

Pastoral Tools for **today's** Church

- Child Safety
- Email integration
- Direct SMS
- Attendance
- Rostering
- Custom Reporting
- and more...

User's Guide

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www.pastoralcare.com.au

Pastoral Care 12 Users Manual

Number 1 in Church Management Software

Written By Jeem Services Pty Ltd

About this manual

This manual contains all of the information produced for and used by the built in Help System in Pastoral Care. All information presented here is also available throughout the Pastoral Care program by pressing F1 on your keyboard at any time.

This is a comprehensive hyperlinked document, you can click on graphics, page links etc to navigate around this manual.

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This user manual was created with Help & Manual.

Pastoral Care 12

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Pastoral Care 12

Pastoral tools for todays church.

Chapter 1

Introduction



(c) 1988-2013 PASTORAL CARE MINISTRIES

Welcome to Pastoral Care, your helping hand in managing your church. Pastoral Care has many great features to assist you in looking after people in your care.

Integrated Groups, Ministries, Status Groups, Dates, Flexi Fields and Medical information allowing you to profile families and individuals, and combining powerful SMS and Email communication tools. take the time to have a browse through this documentation to make sure you do not miss out on anything!

A Word From Us

Thank you for choosing Pastoral Care as your Church Management Software partner. Pastoral Care has been developed with you in mind.

We have been building this one product for over 26 years now, and it has come a long way from those early days of monochrome computers and floppy disks!

We pray, and expect this program to bless your church, and your ministry to your church as this tool can be a powerful aid in developing relationships with people, and ministering to their vast and varied needs.

In case you did not know, this program is built in Australia by a number of developers that are primarily in Ministry, and secondly into computers. Their friendship and love for fellow Christians has always pushed the development of this "ministry gift".

Again, thanks for your support of our gifting, your continued support of Pastoral Care means that Pastoral Care will always be there to support you,

In His Service,

Stephen & Cathy Hickingbotham, Russell & Heather Barker

See also: [Welcome](#) [What's New](#) [Don't Miss a Thing...](#)

Welcome

Welcome to Pastoral Care. If you have upgraded from Pastoral Care 11 or earlier, have a look at the [Whats New](#) area in these helps to learn more about how the latest version of Pastoral Care has improved.



New To Pastoral Care?

Check out the following areas of the documentation:

[standalone Installation](#)

[Network Installation](#)

[Software Registration](#)

[Importing From Other Programs](#)

At a glance...

- Sleek New Look and Feel
- Improved Power Reporting Features
- Integrated Booklet Printing for report styles
- New Simple Interfaces that unlock greater flexibility and control
- [Get the full list of features here](#)

What's New

If you have upgraded, you would have already noticed our slick new look. We hope you find this surprisingly easier to use the earlier versions of Pastoral Care, and also refreshingly similar. How can we offer both new look and still be familiar? We have kept the same design basics and added more power, and brought features together in ways that make the entire program easier to understand.

Since Pastoral Care has been re-written in a new programming language, both under the hood and on the screen, **Everything** is new. above you will find the top 10 reasons this latest version is a must for your church!

1

All previous versions of Pastoral Care have been developed in a now discontinued and unsupported programming language from Microsoft. This means no security updates or bug repairs will be supplied by Microsoft and they doubt programs built in the language from now on will work on future editions of Windows.

You need the latest version To keep up to date with technology, ensuring future data protection and continued support from Microsoft and ourselves.

2

Booklet Printing

Any report at a click of a button can be sent to the printer to create an A5 booklet using A4 paper. Pastoral Care will automatically convert any A4 report into a A5 format and place all the pages correctly so that when the A4 pages are placed on top of each other and folded in half to create an A5 booklet, the pages are all in the correct order. A double sided printer is required so that Pastoral Care can automatically place the printer into the correct double sided format.

3

Better Image Support

Integrated images within Emails and Custom Letters. Emails also include Hyperlinks and frames for professional layouts.

4

New Data Fields

Medical – keep medical info with notes on anyone. Relationships – Ability to connect people to people who come from blended families with a hyper jump from one family to another.

5

Background Processing

Background processing of Emails and SMS. Continue working in Pastoral Care while emails or SMS are being sent.

6

New Custom Reports

A New powerful Custom Report program has been developed. No longer do you have to create separate sub reports to then combine them into a master report, everything is now created in a single report with many new features in designing the reports.

7

New Custom Directory

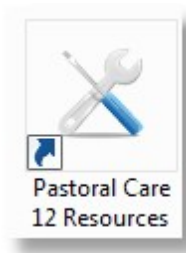
All the power of Custom Reports, however in a simpler interface with a particular focus on designing your printed or electronic Church Directory

8 **New Family Editor**
A brand new Family File interface, simplified and enhanced with new features.

9 **Visitation Management**
A brand new Visitation Manager included for placing Requests to people for visitations to be done with both pre and post visitation notes.

10 **Enhanced Reporting and Filters**
Many new report options, including adding alphabetical separators in the reports, changing the text formatting of all standard reports, including a background image on the report, allowing for a text watermark, report preview and much more...

Don't Miss a Thing...



We know it's just so easy to click on the Pastoral Care icon on your desktop and dive right in!

It is tempting... BUT do not neglect to have a look at what we put in the Pastoral Care 12 Resources program.

You will find shortcuts to really useful documents, a Convert program that will convert your information from an earlier version and some other great programs that we install for you.

See Also :

[Pastoral Care 12 Resources](#)

[Pastoral Care Doctor](#)

[Pastoral Care Communicator](#)

[Pastoral Care Personal SMS](#)

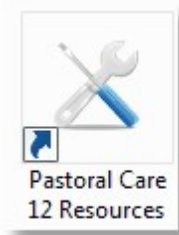
[Pastoral Care Directory](#)

[External Backup Program](#)

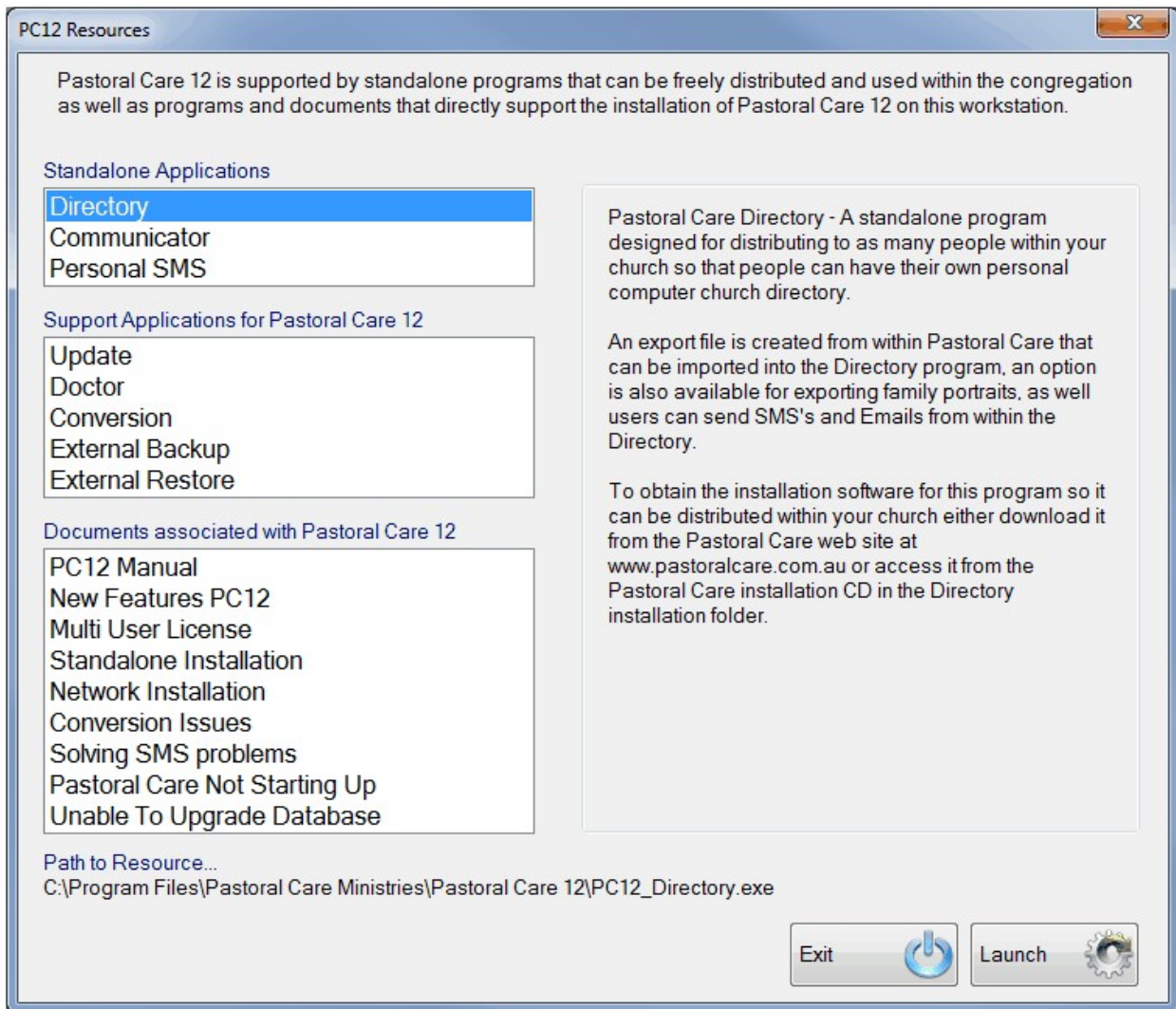
[External Restore Program](#)

[Conversion Utility](#)

Pastoral Care 12 Resources



Click on the Pastoral Care 12 Resources Icon installed with Pastoral Care 12 to give you access to heaps of extras. The Resource Manager is shown below. To open a document or program, simply select the item from the list, and press the Launch button.



Pastoral Care 12

Pastoral tools for todays church.

Chapter 2

Getting Started



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Installation On your CD...

On your Pastoral Care CD, you will find the following folders / files

Folders

Communicator standalone installation files for the Communicator Program. See the [Appendix](#) for more information on this program

Directory standalone installation files for the Directory Program. See the [Appendix](#) for more information on this program

Documents Useful documents on know issues, features list etc

Dot_Net_Installation Pastoral Care Installation Files. No need to access this folder.

Personal_SMS standalone installation files for the Communicator Program. See the [Appendix](#) for more information on this program

Files

AutoRun Runs Automatically when CD is inserted to install Pastoral Care. Not always enabled on all computers.

Network Installation Important document on Network Installation issues for Pastoral Care.

Standalone Installation Installation instructions for a non network installation of Pastoral Care.

Readme Late breaking information on installation issues etc.

PC12_Setup Pastoral Care Setup program. Run this if your CD does not auto start in your computer.

Stand Alone Installation

Pastoral Care can be installed as either a standalone program on one computer, or on a network on multiple computers. Our multi user license entitles the church that purchased Pastoral Care to install it on many computers at no additional cost.

The installation process is very simple and is outlined below.

1. Insert the Pastoral Care CD
2. If Microsoft Windows automatically wants to install the program, accept that action. If nothing happens when the CD is inserted, start Windows Explorer, browse to your CD/DVD drive and double click on the SETUP icon. (Shown Below)



3. Follow the on screen instructions, and when prompted to select which features to install, install everything!

IMPORTANT INFORMATION. If you are new to Pastoral Care, please read the section on [Setting Up Pastoral Care](#) to make sure you get the most from your software purchase.

Network Installation

If you wish to install Pastoral Care on a network, there are comprehensive setup instructions for this in the Setting Up Pastoral Care chapter.

You should firstly set up and install Pastoral Care on a single workstation in preparation for the network install.

You will also find additional information on network and standalone installations on the CD provided with Pastoral Care.

Note, you do NOT need to install Pastoral Care on your file server or network server, in fact we recommend that you do not install Pastoral Care on a server. The main purpose of using a server is to have a common place on the network for all computers to access, so that every person is accessing the same information.

Pastoral Care does NOT support visualization technology, Windows Terminal Services and other thin client deployment methodologies. You may be able to get Pastoral Care to function this way, however these methods are not recommended and support for problems encountered when using Pastoral Care in a manner different to the uses and installation methods described herein will not be available.

FOR NETWORK ADMINISTRATORS

The security features of Pastoral Care are extremely robust. Any attempt by a network administrator to facilitate their own internal security by setting permissions via Active Directory in a Windows Domain Controlled environment will most likely prove fatal to the smooth running of Pastoral Care. We use our own security for application control that is as good as the passwords created from within Pastoral Care.

Please set all network access on the Pastoral Care shared folder for Everyone Full Control. The only risk you have here is accidental deletion of files. This can be covered using good backup procedures. The database we use is secure from prying eyes, even if someone takes the file off site and loads it into another copy of Pastoral Care, they will need to know the passwords and they will need the same version of Pastoral Care loaded.

See also [Network Configuration](#) in the setup area of this documentation.

ODBC Database Connections

It is impossible to attach any other program to our database using ODBC tools, or commercially available tools, including password cracking tools. We have had Pastoral Care security audited by an external group interested in Security and church data and privacy, and they gave up trying to hack in, so we are extremely confident of this security.

Software Registration



Pastoral Care software **must** be registered and activated for continued use. The process locks your purchased software serial number to your church name and protects our product from being used outside of the license conditions.

To find out your registration status, click on the Registration Icon on the main menu toolbar.

Registration Window

Once you have registered with us, we will send you a Permanent Registration Code, this along with your Church Name and Serial Number **MUST** be entered in the Registration window on all copies of Pastoral Care installed by your church. Please note, our generous licensing model allows you to install Pastoral Care on as many computers as you need for your church. Pastoral Care must not be given away to another church!

Pastoral Care Registration

Registration and Activation of Pastoral Care Software grants the user permission to use Pastoral Care Software in accordance with our standard terms and conditions. These terms and conditions were displayed to the user during the installation of Pastoral Care.

Subject to these terms and conditions, Pastoral Care Ministries grants a non exclusive license to the registered user that allows the user to install Pastoral Care on multiple computers for the registered church at no additional charge.

In the case where an individual has purchased Pastoral Care software and they move from church to church, they **MUST** guarantee to Pastoral Care Ministries that they have removed all copies of Pastoral Care Software from all computers associated with that church. If the church they are leaving from wishes to continue to use Pastoral Care Software, then they must purchase their own copy of Pastoral Care software and re-register with Pastoral Care Ministries.

Serial Number found in installation box :

Church Name Registered :

Temporary Registration Key : (Only Required if you don't have a permanent key)

Permanent Registration Key : (This key is supplied after you have registered with us)

Importing from Earlier Versions

Pastoral Care always ships with a Convert utility that allows you to convert your information from earlier versions of Pastoral Care.

See [Conversion Utility](#) for information on this program. See also [Don't Miss a Thing...](#)

The Convert Program will convert all of your information stored in Pastoral Care except for a few exceptions

What will not be converted from earlier versions

We have been unable to build a conversion tool for Custom Letters and Custom Reports. This is due to the radical changes in these areas for vast improvement in performance and reliability, as well as significant design changes to make the use of these tools simpler and more powerful.

Any Custom Letters and Custom Reports that you have designed in earlier versions of Pastoral Care will need to be re-designed in this latest version.

Importing From Other Programs

Pastoral Care has an import feature designed to assist you in importing base contact information to get you started.

To import data, firstly prepare a file using a spreadsheet to manipulate the data into the correct format, and then save it as a CSV file. The Spreadsheet should look like this:

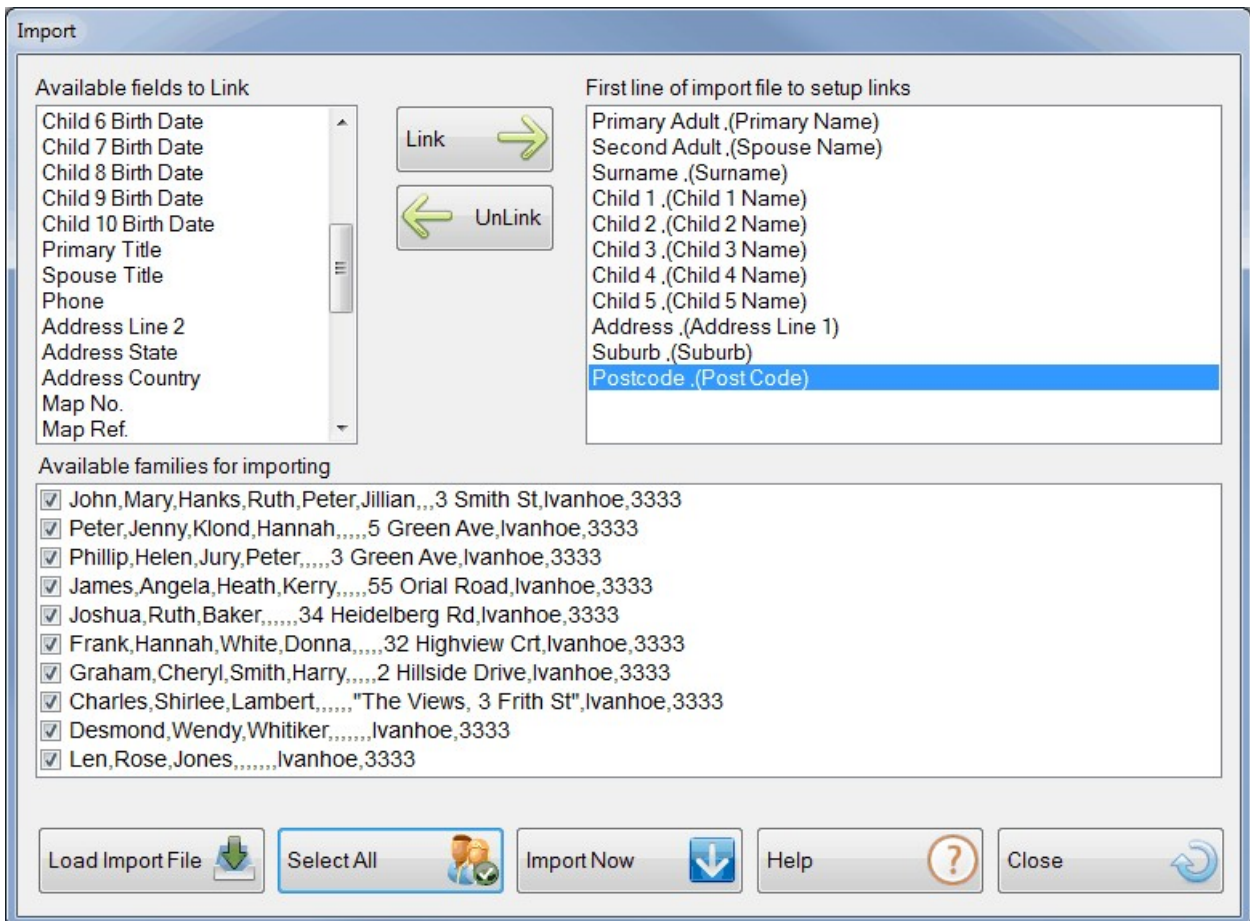
	A	B	C	D	E	F	G	H	I	J	K
1	Primary Adult	Second Adult	Surname	Child 1	Child 2	Child 3	Child 4	Child 5	Address	Suburb	Postcode
2	John	Mary	Hanks	Ruth	Peter	Jillian			3 Smith St	Ivanhoe	3333
3	Peter	Jenny	Klond	Hannah					5 Green Ave	Ivanhoe	3333
4	Phillip	Helen	Jury	Peter					3 Green Ave	Ivanhoe	3333
5	James	Angela	Heath	Kerry					55 Oriol Road	Ivanhoe	3333
6	Joshua	Ruth	Baker						34 Heidelberg Rd	Ivanhoe	3333
7	Frank	Hannah	White	Donna					32 Highview Crt	Ivanhoe	3333
8	Graham	Cheryl	Smith	Harry					2 Hillside Drive	Ivanhoe	3333
9	Charles	Shirlee	Lambert						The Views, 3 Frith St	Ivanhoe	3333
10	Desmond	Wendy	Whitiker							Ivanhoe	3333
11	Len	Rose	Jones							Ivanhoe	3333

Fields available across the top, with information entered as shown above, then save as a CSV (Save As command)

Complete the import

Open an existing family file, OR press Add New Family menu list item on the church tab, main menu. *If you do the Add New Family option, you will need to press CANCEL on the Add New Family pop up window.* Select File Import from the menu at the top of the family file, select the Load import file from the IMPORT WINDOW (see below).

Then the available fields in Pastoral Care will be listed on the left, with your fields on the right. Select each matching field that you can find and press Link. Then either tick all or tick only selected records to import, and press Import Now!



Updating Pastoral Care

From time to time, Pastoral Care Ministries releases software updates for your version of Pastoral Care software.



These are vital to keeping your Pastoral Care software in good condition.

It's so easy to keep up to date, simply press the Update Button on the main menu of any of your Pastoral Care programs, and let us do the rest!

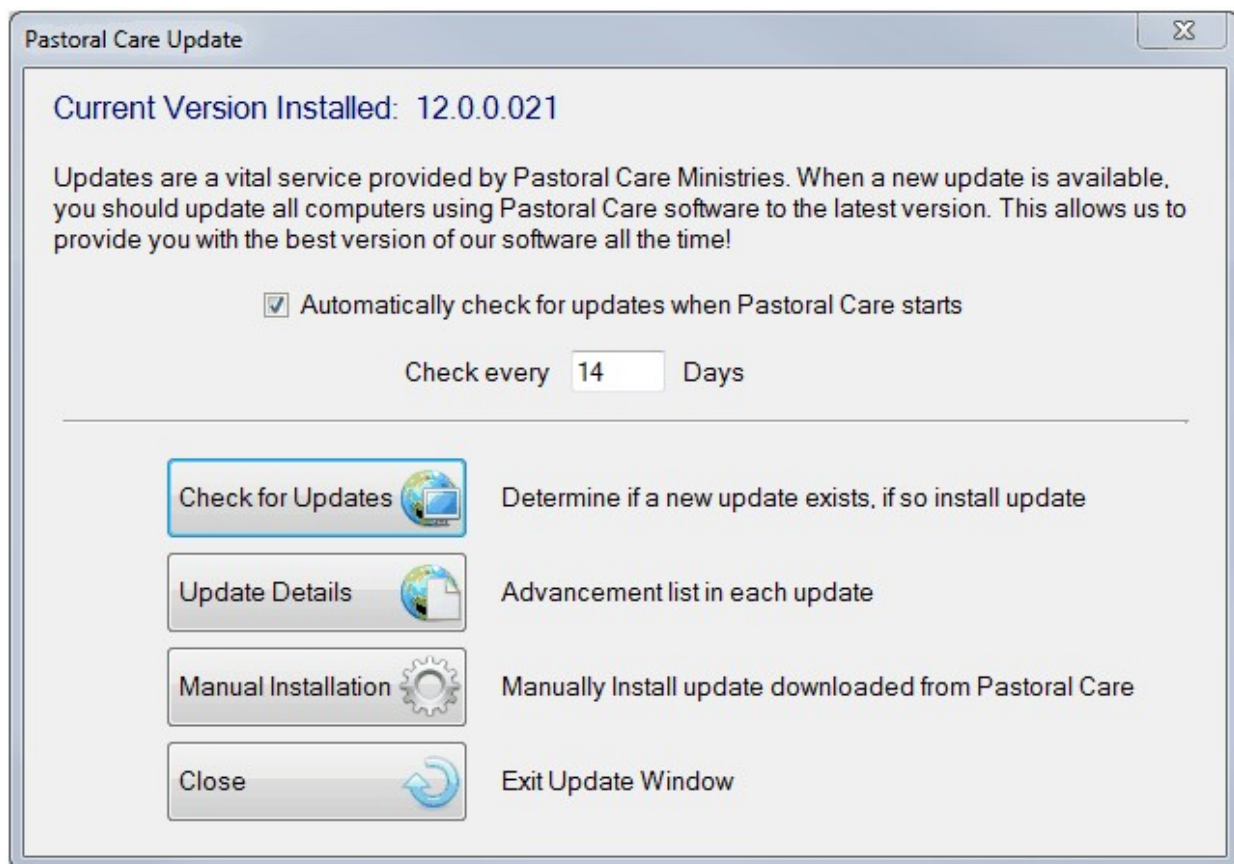
Updating on a Network

Important Information: If you are using Pastoral Care on a network, and you update one of your computers to the latest versions, all other versions must be updated for maximum compatibility.

On a network, Pastoral Care will keep a copy of the latest update for other users to download automatically. There is no need to press anything other than the update button, Pastoral Care will get the latest version off the internet or off your local network if it is already downloaded there!

Update Control Window

When you press the Update button on the main menu Toolbar, the following control window opens up.



Check for Updates

Press the "Check for Updates" button for the simplest and fastest method of updating Pastoral Care. This will also automatically put a copy of the update on your networked Pastoral Care folders for other computers to access the same update. This stops multiple downloads and increased internet usage.

Update Details

Press the Update Details button to see a list of improvements made in each update.

Manual Installation

If for some reason the Check For Updates does not automatically work, you can use this feature to manually browse to a file you have downloaded from us to update your software with.

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Pastoral tools for todays church.

Chapter 3

Managing People



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Group Philosophy

At the very core of managing a large gathering of people you will find one common feature. Common to all churches, all sporting clubs, Scouts and Guides etc. What is this common thread to managing people and why is it so important?

Groups are Vital to Managing People



Throughout your life you deal with many people on an individual level, but more often than not we organise people into our own groups. Family, Friends, Work, Sport, people in our "in" group etc. This helps us establish the way we commonly interact with people and helps us respond in a consistent manner within that particular circle of people. Groups are also vital in church management. From really simple tasks like emailing people about a members meeting, to asking for volunteers for an outreach dinner. Whether or not you officially use groupings in your church or not, we all do in our mind.

This is why Pastoral Care is so groups orientated. Groups are integrated throughout the entire program. They affect every part of Pastoral Care, and are a vital tool in organising and managing your church.

Groups in Pastoral Care

We use groups in Pastoral Care in many different ways. A group is simply a collection of people under a title. Some groups only individuals belong to. In reality, this type of group (the individual group) is the most common group of all. Some groups the entire family belongs to. These are less common.

We have 12 main group categories in the family file that people can participate in, or be involved in. Only TWO of these groups types are Family Group types, the rest are Individual Group types.

If you stick to using Pastoral Care with the groups as designed, you should find that managing your church becomes easier. If you move too far away from the designed purpose, then you might find using Pastoral Care becomes difficult.

This does not mean you have to use every group type we have created! Just use the right groups for the right task and you cant go wrong!

After reading this, you can find where to setup groups etc in the [Setup - Family File](#) area.

Tag Only Groups

A tag only group is a group that a person belongs to, and no other information on that "belonging to" exists. For example a person having a status of Elder, is simply having that status of Elder ticked against their name. If a person belongs to a group called Elders, then in the background, the date that the person joined and or left that group is also recorded. So some groups have additional information to support the assigning of that group, others simply are a tag, a Yes or No!

Pastoral Care Group Definitions

A full description of each group and its intended purpose is outlined in the following table..

Group	Scope	Use	Example
Status	Individuals	Intended to describe in general something that a person is involved in doing a specific task. Very similar to individual groups. This is a tag only group.	<i>Flowers, Communion Setup, Committed Attender, Occasional Attender, Offering, Car Park</i>
Individual Groups	Individuals	Intended to describe in general a group that person belongs to that meets together for a purpose. The date that person has joined and also left this group is recorded automatically for group history reports.	<i>Bible Studies, Home Groups, Fellowship Groups</i>
Ministry	Individuals	Ministries can be tagged to a person as Active or Potential. Active are people using a ministry, potential are people who you have highlighted to be encouraged into ministry. What you might call ministry may not suit all people, but your definition for things that people do to care for, support, encourage and serve others with will be fine.	<i>Preaching, Healing, Teaching, Communion Leader, Welcoming Team, Piano, Music, Singer, etc</i>
Medical	Individuals	A very practical group here for obvious reasons. Classify people with specific medical conditions. Additional information can and should be entered against each person for a treatment or response plan in case of emergency	<i>Allergies, Asthma, Diabetes etc</i>
Relationships	Individuals	A relationship group is a group of 2 people that describes a defined relationship. This is used to build a link between 2 people in separate family files via a special relationship.	<i>Birth / Natural Father, Guardian, Grandparent, Step Father, Step Daughter etc</i>
Individual Dates	Individuals	An individual date is a grouping that is defined by an event that has occurred in an individuals life. You can record both a tag and a date against this type of group	<i>Conversion, Baptism, First Contact, Membership</i>
Flexi Fields	Individuals	A flexi Field is a group that not only lets you define the name of the group, but also define the information stored in that group! For Example, if you defined a group called Blood Type, then you could add a list of items as a look up list for A, A+ B B+ A-	<i>Blood Type, Assigned Elder, Last Church</i>

		B- etc	
Occupation	Individuals	A person can belong to an occupation group based on a list of occupations setup in Pastoral Care	<i>Builder, Electrician, Accountant etc</i>
SMS List	Individuals	An SMS list group is a list of people that you want to contact together as a group on a regular basis	<i>Management Groups, Leadership groups, Directors, Leaders Etc</i>
Email List	Individuals	An Email list group is a list of people that you want to contact together as a group on a regular basis	<i>Management Groups, Leadership groups, Directors, Leaders, Members etc</i>
Family Groups	Families	Intended to describe in general a group that an entire family belongs to that meets together for a purpose. The date that the family has joined and also left this group is recorded automatically for group history reports.	<i>Congregational Groups, Language / Cultural Groups</i>
Family Dates	Families	An family date is a grouping that is defined by an event that has occurred in the life of the entire family. You can record both a tag and a date against this type of group	<i>First Contact, Wedding</i>

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Chapter 4

Common Features



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Pastoral Care comes with many features and concepts that are either similar or identical in function and form, yet are used in different areas of the program. We have chosen to document those features here, and refer back to them throughout the helps and the manual at the relevant places.

There are 4 areas that can be accessed from a number of locations. Email, SMS, Quick Reports and the Toolbox.

Email

The Pastoral Care email engine has undergone a significant overhaul. An entire new engine under the hood means that email sending is now faster and more reliable. Emails can be sent from a few different locations.

- The [Email Manager](#) from the Explore Tab
- Main Menu Church Family [Address Book](#)
- Quick Email button on the main menu
- Email Button on the [Family File Toolbar](#)
- Visitation Area
- Groups accessed via the Main Menu or the Toolbox
- Report Viewer

Click on [here](#) for full details on the EMAIL common feature.

SMS Messaging

SMS messages can be sent from a number of different locations.

- The [SMS Manager](#) from the Explore Tab
- The SMS Button on the Main Menu Church Family [Address Book](#)
- The SMS Button on the [Family File Toolbar](#)
- The Family Search Window
- Quick SMS button on the main menu
- Groups accessed via the Main Menu or the Toolbox
- Report Viewer

Click [here](#) for more details on this SMS common feature.

Quick Reports

Quick reports are available in a number of areas of Pastoral Care.

- Main Menu - Groups
- Groups from the Toolbox
- Group to Group reporting from the Explore Tab at the main menu

Click [Quick Reporting](#) for more details on this REPORTING common feature.

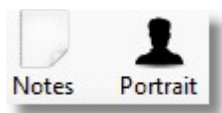
Tool Bar Active Icons

Throughout all of the Pastoral Care program and associated programs, we use a system of what we call Active Icons to alert the user to additional information. An Active Icon is just a normally displayed Icon with an extra LINE drawn under it. The LINE indicates that something is active in that area behind that button.

The best example of this is in the Family File.



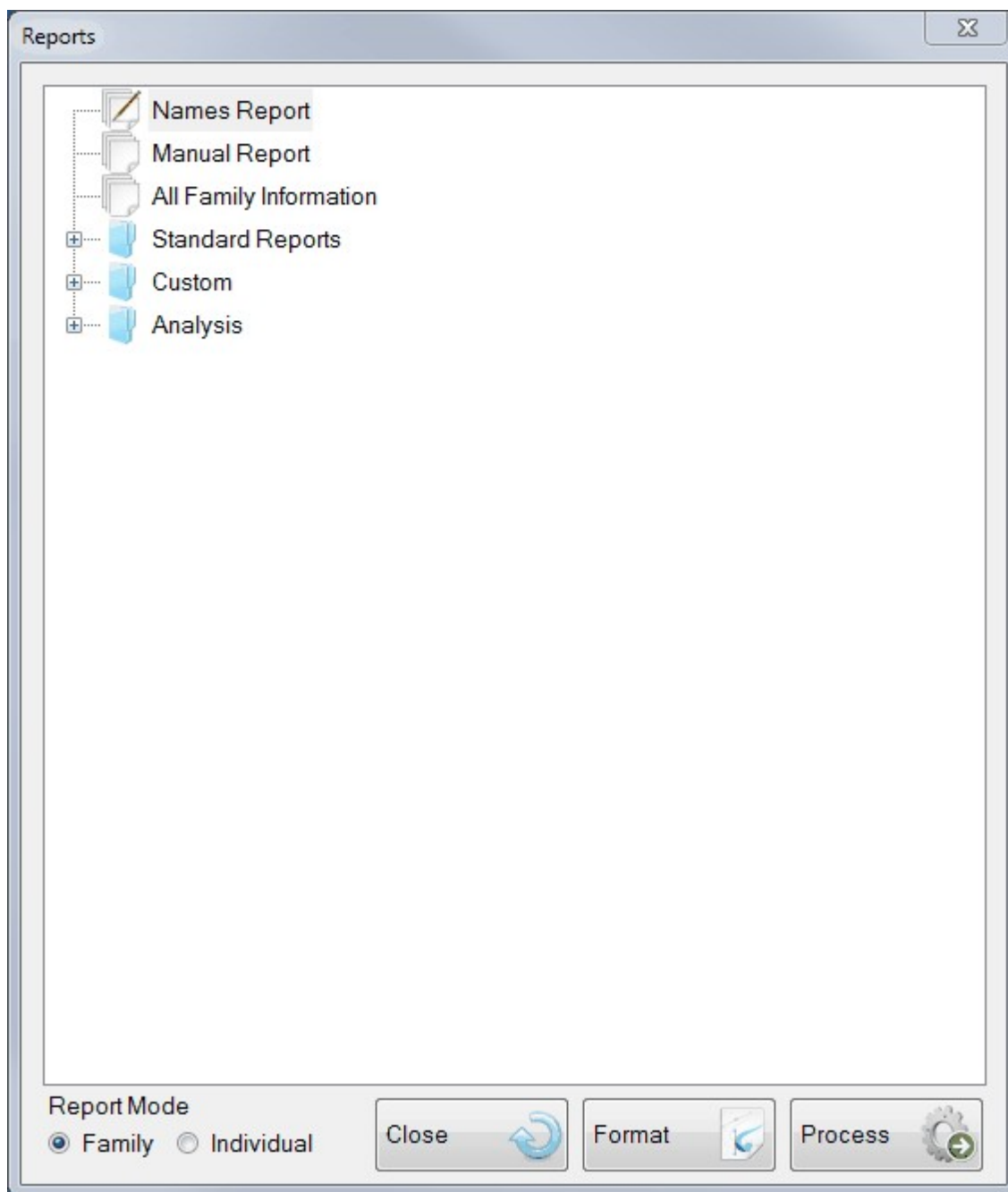
These two buttons are indicating that Notes and Portrait information exists that can be accessed by clicking on those buttons. Shown below are the same buttons where there is no information stored in those areas.



Quick Reporting

Quick Reports are reports that come already filtered and set ready to run. They appear in in various parts of the program, including the Groups area of Pastoral Care and also Group to Group reporting. Simply choose a report format from the tree list, and press Process to output all people in the current scope to the selected report.

See also [Pastoral Care Reports Master List](#).

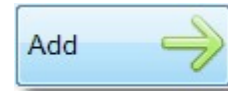


Common Icons

There are a number of icons throughout Pastoral Care that all have a similar function. As well as being described throughout the documentation, we have also described them here.

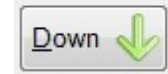
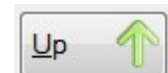
Add

Add a selected item to a person / family or list



Move / Order

Order an item stored in a list



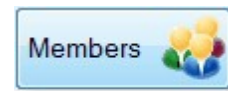
Delete

Delete a selected item from a list



Members

Press this button to view a list of all members of a selected group / list



Add Item

Add a new setup item to a list of items.



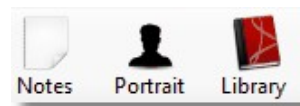
Active Icons

Throughout the Pastoral Care Program, we use many different icon buttons to take you to another feature / area. Many of these icons are static, that is they never change. Some are what we call Active Icons. An Active Icon button is one that has a visual indicator that some information is available by pressing that button.

A good example of this is in the family editor. The Notes and Portrait icons are active icons.

Standard Icon Sample

Shown right are the normal Notes, Portrait and Library icon buttons. These are displayed as the condition they would be in for a new family just entered into the database.



Active Icon Sample

Shown right are the same Icons, only this time, Notes and Portrait have some information saved in them for the current family.



The Line under the Icon indicates that this area has information stored in it, or in some cases, settings have been changed in that area.

Data Grids

Throughout Pastoral Care, you will find many places where a Data Grid is used. A Data Grid has a common look about it and a sample one is shown below.

Family	Target	Requests	2012 Visits
Allwright Stephen & Marion		1	
Angel Peter & Belinda		1	
Anglin Brent & Katey			
Baker Joshua & Ruth			
Barker Dan & Ethel			

Data Grid Features

Listed below are the standard features for a data grid. Not all of these features are available in all areas that this item is used, however most areas use at least some of these features, if not all of them!

Sort

You can sort the information in the grid by clicking on any of the column headings. In the example above, you could click on Family to change the order from A-Z to Z-A. Each click will flip the sort order in the opposite direction. When a caption is clicked, if it is sortable, you will see a little arrow / triangle shape appear in the caption.

Family	Target
Taylor Greg & Ruth	
Smith Graham & Cheryl	

Edit

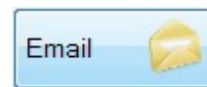
In some cases, you can edit information stored in a grid. Just click in the cell that you want to edit and make your changes.

Shown below is the Visitation Assigned To Cell about to be edited, it has turned white indicating you can now type in that field to change or replace or remove the information stored here.

Date	Requested By...	Visitation Assigned To...	Pre Note	Post Note
6/08/1993		Graham Lawson		Yes

Email

The Email Button is one of our common area features. Whenever this is pressed, the email area is loaded with some limited features and names and email addresses already loaded.

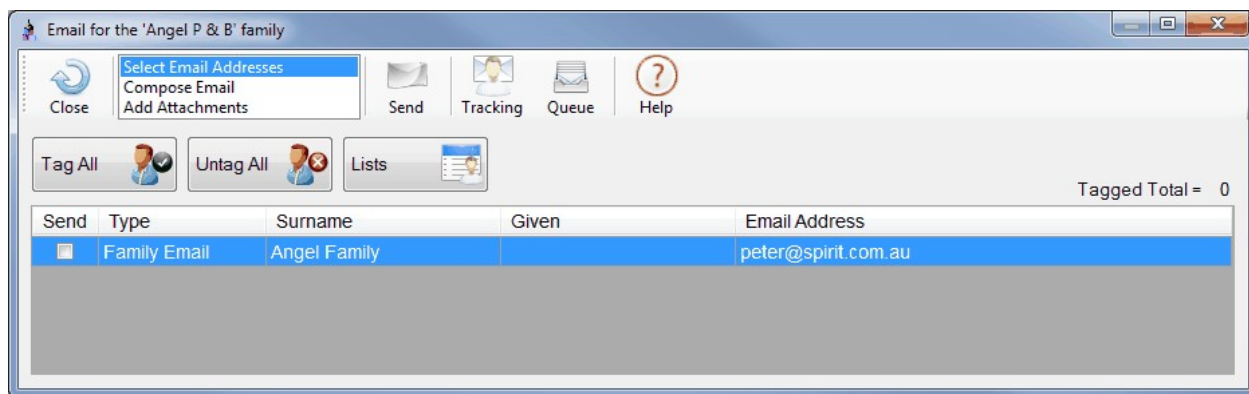


There are a few options available starting with Selecting Email Addresses, Composing the Email, Adding Attachments and finally sending the email.

See also [The Email Manager](#) for full details on all email functions in Pastoral Care.



Click on each area of the below email window to learn more about this feature.



Using Pastoral Care to Communicate

There are two main direct communication tools for use in Pastoral Care. Email and SMS. We will talk about email below, however everything said here **also** applies to the SMS feature in Pastoral Care.

There are a few issues you should consider to review before using Pastoral Care to send emails. If you are already using Pastoral Care to send emails, it will not hurt for you to review your email handling procedures from time to time. When sending emails to people in your church, you should be mindful of some people's sensitivity towards spam.

Definition of Spam

At the time of publishing, there is no one globally recognised definition for spam. In Australia, Anti-Spam legislation refers to the phrase “unsolicited commercial electronic messages” (the word “spam” is not specifically mentioned). There is no reference to bulk messaging; therefore a single unsolicited commercial electronic message could be spam. The judicial provisions are technologically neutral, and therefore apply to any unsolicited commercial messages delivered to the consumer via email, SMS, MMS and instant messaging. Faxes and voice-to-voice telemarketing are excluded.

Opt in and Opt Out

Given the above description, the very nature of church communication is essentially non commercial, and therefore does not constitute spam. However, to avoid arguments with people that consider any email an intrusion into their life, we suggest that you use some of our built in features for managing Opt In or Opt Out preferences.

Having a person subscribe to or give permission to email/SMS is the simplest method. In the Email and SMS areas, you can create Lists, that contain a list of names and email addresses / Mobile Phone numbers for sending people messages. You can define multiple lists, leaving you with the ability to create a list for each type of message.

Some examples could be:

- News Letter Distribution
- General Announcements
- Business Meeting Communications
- Youth Group Announcements
- etc

Using Status

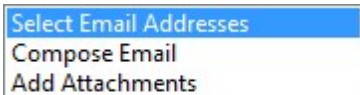
If you are going to use a status for filtering people to message, create them all starting with one word so they are easy to identify in the list of status's. For Example:

- email-news
- email-youth
- email-general
- SMS-General
- SMS-YOUTH
- etc

General Permission

If you are not sending out heaps of messages every few days, then it may be possible to just get general permission from people in your church to be happy to accept messages. You could then manage this with one list, or one status, and use a filter to load in just those people who have given you permission.

Options



Select Email Addresses

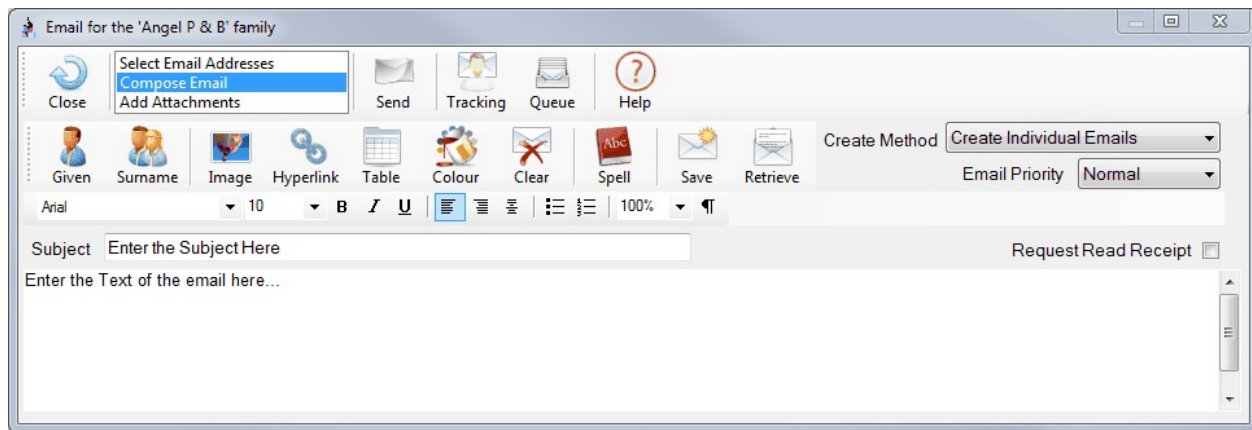
Choose this option to view the Family and Individual Emails available for the selected family. You can tick the Send option on the left of each person to choose who you wish to send the email to.

Send	Type	Surname	Given	Email Address
<input type="checkbox"/>	Family Email	Angel Family		peter@spirit.com.au

Compose Email



Click on each of the areas of the Compose Email window shown below to learn more about composing email features.



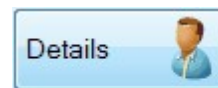
Add Attachments

Use the Add Attachments window to select what files you want to send with the emails. *Note: If you are sending a large attachment to many people, the "Create Individual Emails" method whilst preferred for privacy, will be slower to send.* The Pastoral Care email engine in this version is far superior to earlier versions, allowing you full control of the main Pastoral Care program while emails are handled in the queue program.

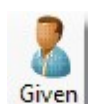
Attach Personal Details Report

The Attach Personal Details report allows you to email a selected range of personal information to the email recipient regarding the person / people in their family. If you are sending an email formatted to Families (Family Email Address) then the personal details attachment will be for every person in the family. If you are sending an email formatted to Individuals (Individual Email Address) then the personal details attachment will be for that one person who received the email. A Personal Details Report is perfect for notifying people in your church about what information you have on record. You could email everyone once a year including a personal details report and ask them to print it out, and note on the report any changes, and bring it back to the church office for updating.

Pressing the Details Button will bring up the Personal Details selection screen. Note Family Information will not be enabled if you are in individual mode.



Compose Email ToolBar



Insert a field that automatically includes the recipients given name



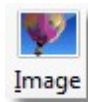
Set the Text Colour and Background Colour of the selected text.



Insert a field that automatically includes the recipients last name



Clear the current email



Insert a Picture into the email.



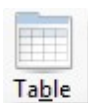
Access the Spell Checker Settings



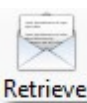
Insert a Hyperlink in your email



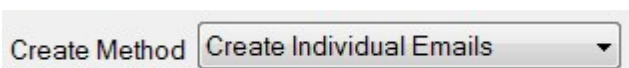
Save your email for later use.



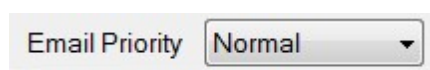
Insert a Table in your email. Ideal for assisting in layout of email in a particular way.



Load a pre-saved email.



Choose to Create all emails as individual emails (recommended), or add all address information to the "To" field or add all address information to the "BCC" field.

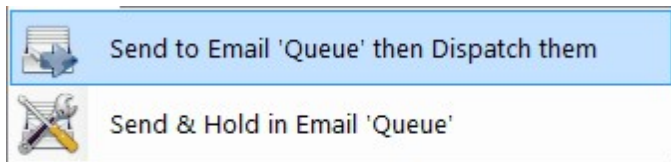


Set the email priority as Low, Normal or High.

Send



The Send button has 2 options. Send to Queue and Dispatch, and Hold in Queue.



Send to Email Queue then Dispatch

Send the emails off to the Email Queue Manager, and dispatch the emails immediately.

Send and Hold in Email Queue

Send the emails off to the Email Queue Manager, and hold them for sending later.

Tracking Email

Use the tracking email to send effectively a Blind Copy to another person in your church for seeing what email communications are being sent from Pastoral Care.

A tracking email contains a copy of the message, the names of those people who the email was sent to, and the words Tracking Email in the subject to assist people in setting on how to handle tracking emails. See also setting up [Email Tracking](#) for information on how to define your tracking email addresses for use in Pastoral Care.

Details Sub Report Options

Tick any of the fields that you wish to include on the emailed report.

Note the Date Filter Button. This button allows you to restrict the information on selected date fields based on a date range. This feature is included in this area only because it exists also in the reporting area and is not recommended for use for the purpose of emailing people regarding the updating of your records, as using a filter for this purposes restricts what is displayed.

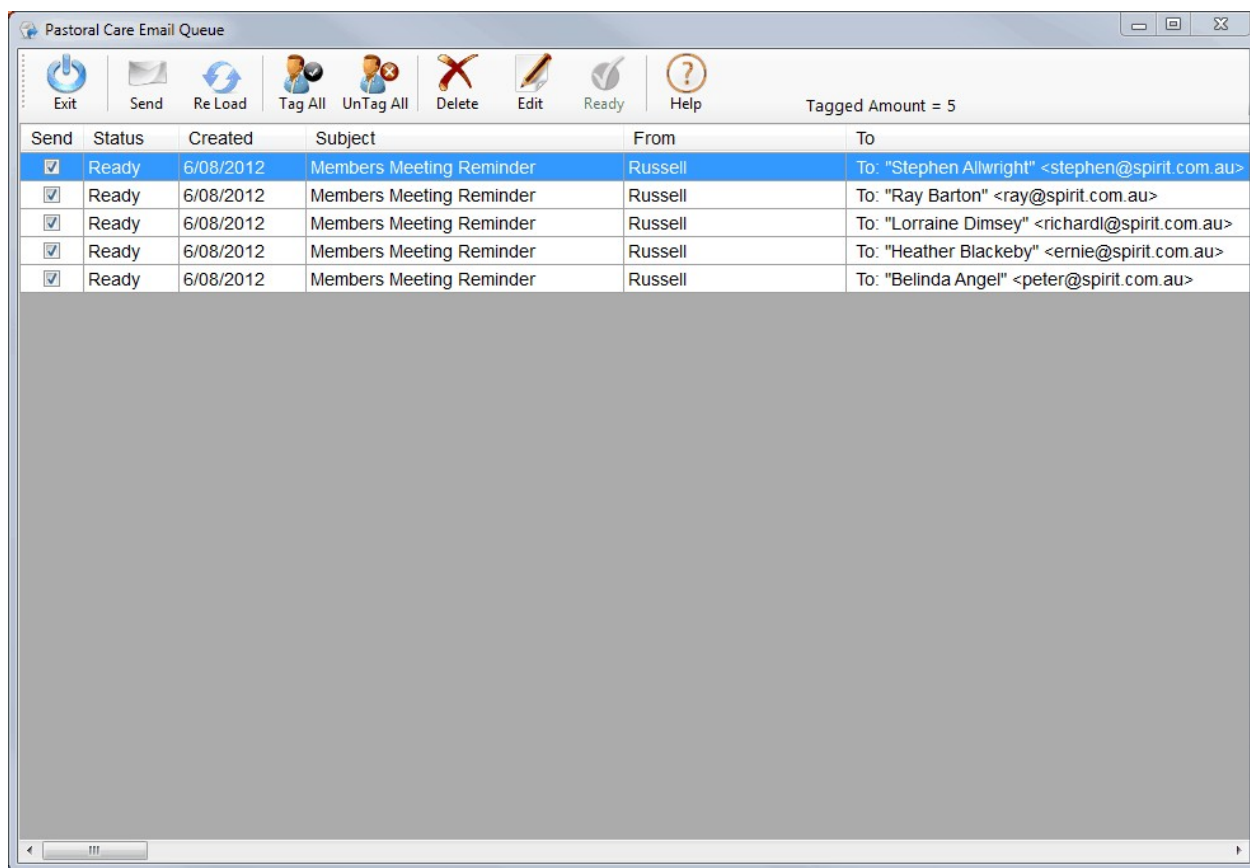
Email Personal Details Report

<p>Individual Details</p> <p><input type="checkbox"/> Individual Condition <input type="checkbox"/> School Year</p> <p><input type="checkbox"/> Gender <input type="checkbox"/> Occupation</p> <p><input type="checkbox"/> Preferred / Actual Name <input type="checkbox"/> Status</p> <p><input type="checkbox"/> Title <input type="checkbox"/> Individual Groups</p> <p><input type="checkbox"/> Birth Date <input type="checkbox"/> Ministry</p> <p><input type="checkbox"/> Other Surname <input type="checkbox"/> Medical</p> <p><input type="checkbox"/> Middle Name <input type="checkbox"/> Relationship</p> <p><input type="checkbox"/> Personal Email <input type="checkbox"/> SMS Lists</p> <p><input type="checkbox"/> Personal Mobile <input type="checkbox"/> Email Lists</p> <p><input type="checkbox"/> Business Phone</p> <p><input type="checkbox"/> Business Email</p> <p><input type="checkbox"/> Business Fax</p> <p>Individual Dates</p> <p><input checked="" type="checkbox"/> Membership</p> <p><input type="checkbox"/> Baptised</p> <p><input type="checkbox"/> Confirmation</p> <p><input type="checkbox"/> Christened</p> <p>Flexi Fields</p> <p><input type="checkbox"/> Elder</p>	<p>Family Details</p> <p><input type="checkbox"/> Residential Address <input type="checkbox"/> Family Condition</p> <p><input type="checkbox"/> Postal Address <input type="checkbox"/> Family File Created & Last Edit Date</p> <p><input type="checkbox"/> Phone <input type="checkbox"/> Family File Memo</p> <p><input type="checkbox"/> Family Mobile <input type="checkbox"/> Family General Notes from NoteBook</p> <p><input type="checkbox"/> Family Fax <input type="checkbox"/> Family Visitation Notes from NoteBook</p> <p><input type="checkbox"/> Family Email <input type="checkbox"/> Personal Notes from NoteBook</p> <p><input type="checkbox"/> Other Contacts <input type="checkbox"/> Include Portraits</p> <p><input type="checkbox"/> Family Group</p> <p><input type="checkbox"/> Family Events</p> <p><input type="checkbox"/> Visitation</p> <p><input type="checkbox"/> Include Pre Visitation Notes</p> <p><input type="checkbox"/> Include Post Visitation Notes</p> <p>Family Dates</p> <p><input type="checkbox"/> Wedding Date</p> <p><input type="checkbox"/> Contact Date</p>
--	---

Email Queue

The Pastoral Care Email Queue is an email sending manager that allows emails to pile up to be sent at a time of your choice. This new way of dealing with emails comes with a significantly improved method of handling the send process, and sending a large quantity of emails no longer stops you from using your computer for other things at the same time, including continuing to use Pastoral Care as the emails are being sent.

The Same Email Queue window will open regardless of where you access this feature from. EG: The Address Book [Email](#) area or the [Email Manager](#) on the Explore Tab.



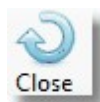
Email Queue Features

As well as showing you all the emails to be sent, there are a couple of really powerful features in the Email Queue area. You can Edit a single email if you like before it is sent. That is, change the Subject, the Body, add an attachment etc. The only thing you cannot change is who is receiving that email.

See Also [Email Queue Tool Bar](#)

Email Queue Tool Bar

The following buttons and functions exist on the Email Queue Tool Bar.



Close

Exit the Email Queue and return to the previous Pastoral Care window.



UnTag All

Untick all emails in the list so that they will not be sent



Send

Send all tagged (ticked) emails in the queue straight away.



Delete

Delete emails from the Queue. See Delete Options below.



Re Load

Refresh the email queue. In a multi user environment, someone else may have queued up emails to be sent, and you might wish to see the entire list.



Edit

[Edit](#) the highlighted email before sending. This feature will edit one email at a time and is designed to adjust one or 2 emails before sending. If you want to change a batch of emails, delete them all and start over!



Tag All

Tick all emails in the list to send

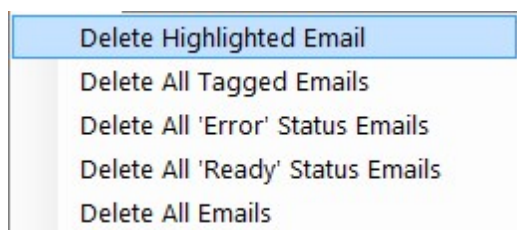


Ready

Change the status of an error state email back to ready so it can be sent again.

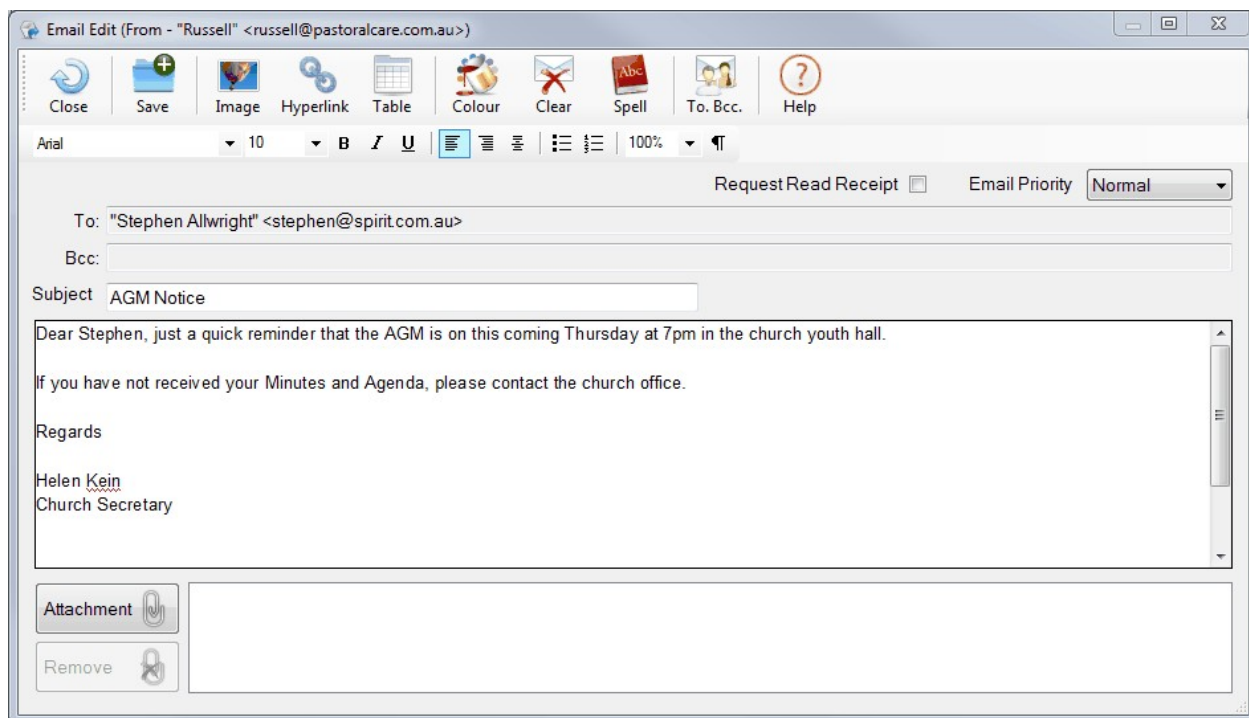
Delete Options

Please note, once one of the delete options are deleted from the Queue, they cannot be recovered.



Edit Email From Queue

By selecting an email in the [Email Queue](#) and pressing the Edit button on the tool bar, you will be shown and Email Edit window. This allows you to change one email in the queue before it is sent. This allows you to have perhaps sent 50 standard emails to a bunch of people, but before they go, you can tweak a few of them!



As well as being able to edit the Subject and Message, you can also add or remove Attachments, use any button on the toolbar to include Images, Hyperlinks and Tables etc. You can even change who you are sending the email to by pressing the To.BCC button shown right.

Pressing this button allows you to edit the "To" and "BCC" fields of the email, or press on the To or BCC field on the form.

You can add other email addresses from the already selected recipient, or you can add other people as recipients as well.

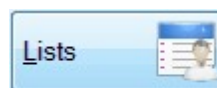
Tag

Press Tag All to send emails to everyone in the list. Press Untag All to remove all ticks and therefore exclude people from the email send.



Lists

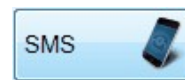
Press the Lists button to select an email distribution list to send emails to. After selecting a list, all people in that list will be loaded, allowing you to send an email to all people in that list.



SMS

SMS (Common Features)

There are a few common areas that the SMS feature can be used from. Anywhere you see the SMS button you can press this to send text messages to people from the current area. For example people in the current family file, or people in the currently selected group etc. See also [SMS Configuration](#) for more information on how to get Pastoral Care ready for SMS messaging.



SMS Family Screen

The example we are showing below is using SMS from the Family File, however it is identical to pressing SMS from the Main Menu Group window or [Address Book](#).



Click on each area of the window below to learn more about how this feature works.

Send	Type	Surname	Given	Phone Number
<input checked="" type="checkbox"/>	Family Phone	Angel Family		054-22-1199
<input type="checkbox"/>	Personal Mobile	Angel	Peter	041234567890
<input type="checkbox"/>	Personal Mobile	Angel	Belinda	041234567890

Options

Select Phone Numbers
Compose SMS Message

Choose the Select Phone Numbers to tag / tick people you want to send a text to.

Choose Compose SMS Message to write the message to send.

Tag Phone Numbers

Press Tag All to tick all phone numbers on the screen to send a text to.

Press Untag all to de-select everyone in the list.



Note, if you select a landline phone number, where supported, SMS message will be converted to Voice for that phone. (Currently supported in Australia and New Zealand in most areas)

Lists

Choose a pre-defined SMS list to send a message to. This will remove the family from the Tag options, and load in people in the SMS List.

See also [SMS Lists](#) in the [SMS Manager](#) area.

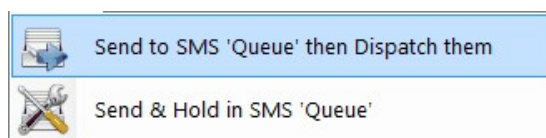
Send

When you press the Send Button, you are presented with 2 options. You can Queue the messages for later, or send them straight away.



Send and Dispatch

This option will send all the messages to the SMS Queue, and then Pastoral Care will send the messages out to SMS Global for immediate delivery.



You will be notified of the estimated cost for the message (s) to be sent with the option of canceling if you change your mind.

Send and Hold

This option will send all the messages to the SMS Queue, and then HOLD them there for review and sending later. See [SMS Manager](#) for more information on SMS management etc.

Tracking

If you have setup SMS Tracking (See [SMS Tracking](#) in the Setup area of Pastoral Care) then you can press the Tracking Button to select who will get a Blind CC of the message. This helps to keep the use of the SMS area and subsequent costs accountable.



Queue

The SMS Queue is used to manage the sending of SMS messages in batches as you choose. More information on how this feature can be used can be found in the [SMS Queue](#) area of the [SMS Manager](#)



Archive

View the archive of SMS messages sent to currently selected family.

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Pastoral tools for todays church.

Chapter 5

Toolbox



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The Toolbox Icon shown above appears in many different locations. This is a quick shortcut to some really common features that are used frequently. There are 7 options on the toolbox, each is described below.

**Family**

Press the Family button to load the Family Search window. See [Search For A Family](#) for more details on this

**Groups**

Access a quick view of all groups in Pastoral Care. Print out reports on groups, and also modify groups. See [Groups](#) for more details on this.

**Quick Date**

Access reports on Date Information in Pastoral Care. See [Quick Date](#) for more information on this area

**Scribble Pad**

Access a quick note taker. Designed to leave notes for other people to see when they start Pastoral Care. See [Scribble Pad](#)

**Manual**

Access the Pastoral Care user guide. A fully indexed and hyper-linked document that guides you through all areas of the program.

**Navigate**

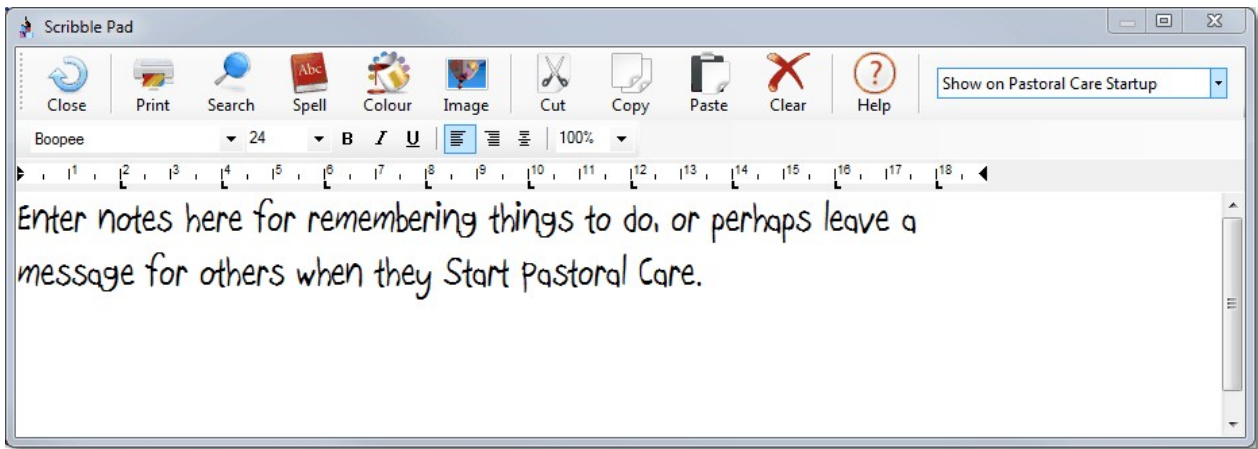
Press Navigate to jump to another area of the program without having to go via the main menu again.

**Exit**

From anywhere in the program, press Toolbox - Exit and Pastoral Care will shut down.

Scribble Pad

The Scribble Pad is a small text input area that lets you either just take notes for yourself to remember later, or to leave messages for other people to see when they start Pastoral Care.



Included on the toolbar are controls for Printing, Spell Checking, Colours, inserting an Image and also Font Control. Font and Colour settings work on the selected text.

Quick Date

The Quick Date form allows you to have quick access to date search reports.



Click on each area of the form below to learn more about this feature.

Family / Individual Format

Family Format Individual Format

Family Mode

In Family Mode, Pastoral Care outputs the reports sorted and GROUPED by the main family surname.

Individual Mode

In Individual Mode, Pastoral Care outputs the reports sorted by the main family surname, or the Individuals Surname if one exists. There is no Family Grouping in Individual Mode.

All Dates

Choose this option to output all people that have a date from the selected Date Type you are searching on.

 All Dates

Within the next

Find a date that exists within the next number of days. This search IGNORES the year component of the date being searched for, but looks only at the day and month. For Example, select Birth Date and search within the next 7 days to find all people who's birthday falls within the next 7 days.

 Within the next Days

Month

Find a date that exists within the selected Month. This search IGNORES the year component of the date being searched for, but looks only the selected month. For Example, select Birth Date and January to find all people who's birthday occurs in January.

 Month

Age

Find all people who are of a certain "Age" for the selected date. This search needs the year component in the information stored to be able to calculate the age. Age is not restricted to a person's Physical Age, but also different dates, such as Membership etc if you have recorded that information in Pastoral Care.

 Age To Years

Date

When you select Date, you then need to enter a RANGE in the boxes shown above. Pastoral Care will then search for the selected date that is recorded between and including the 2 dates entered.

 Date

 To

Anniversary

For the Anniversary Date Range Search, enter a From and To Date Range to look in, and Pastoral Care will find all dates for the selected date type who's anniversary falls within that range. For Example to find ALL BIRTHDAYS that occur in the next 6 weeks, enter a date range to represent the next 6 weeks, and Pastoral Care will find all people who are having a Birthday in that range. This search ignores the Year component of a date.

Anniversary Date

To

If Date does not exist

This will find all people that do not have a date recorded in their file against the selected date.

If Date does NOT exist

Order Date By

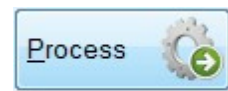
Set the sort order of the report for Surname, Month or Date.

Order Date by

By Surname By Month By Date

Process

Press the process button to produce the date report.



Dates

Select the Date that you wish to search for. The available dates will depend on what family and individual dates you have setup in your version of Pastoral Care.

Dates that we make available for this area include:

- Birth Date
- Visitation Dates
- Family Events
- File created and Edited Dates
- Family Dates
- Individual Dates



- Birth Date
- Visitation
- Family Events
- Family File Create Date
- Family File Last Edited Date
- Wedding Date
- Contact Date
- Membership
- Baptised
- Confirmation
- Christened

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Pastoral tools for todays church.

Chapter 6

Windows Integration



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As Pastoral Care is a Windows based program, there are some features that are enabled in the software simply because they are a part of Microsoft Windows.

The Microsoft Windows features are used by Pastoral Care for saving of files, reports etc, and for clipboard functionality as well as printing and network services. Most of these features are used "as is" on your computer and we assume that they function correctly.

See [Saving Files](#) and [Clipboard](#) for more information on these.

Saving Files

When Pastoral Care wants you to save a file, you are expected to provide a location for your file to be saved in, and usually a file name as well. Poor management of what you call files / reports, and where you save them will lead to time wasting from doubling up reports and tasks and looking for where things are saved.

You should take the time to work out where you are going to save information generated from Pastoral Care and what Folders / Folder names you are going to use.

Think of a folder as like an older style Filing Cabinet. Each Drawer has a name, and in each draw there are sections that are named with folders that have names etc. If you can imagine one like this, then that is how your folder structure for saving files should be.

Clipboard

The Windows Clipboard is designed to share information across different software programs. Anywhere there is a place that information can be typed into, you can paste text from the clipboard.

For technical reasons that will put you to sleep to explain them, we are generally unable to provide Buttons for Cut Copy and Paste commands, however the Windows shortcuts work in Pastoral Care and most other windows based programs also.

Windows Clipboard Shortcuts

- Control Key + X at the same time : Cut
- Control Key + V at the same time: Paste
- Control Key + C at the same time : Copy

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Pastoral tools for todays church.

Chapter 7

The Main Menu

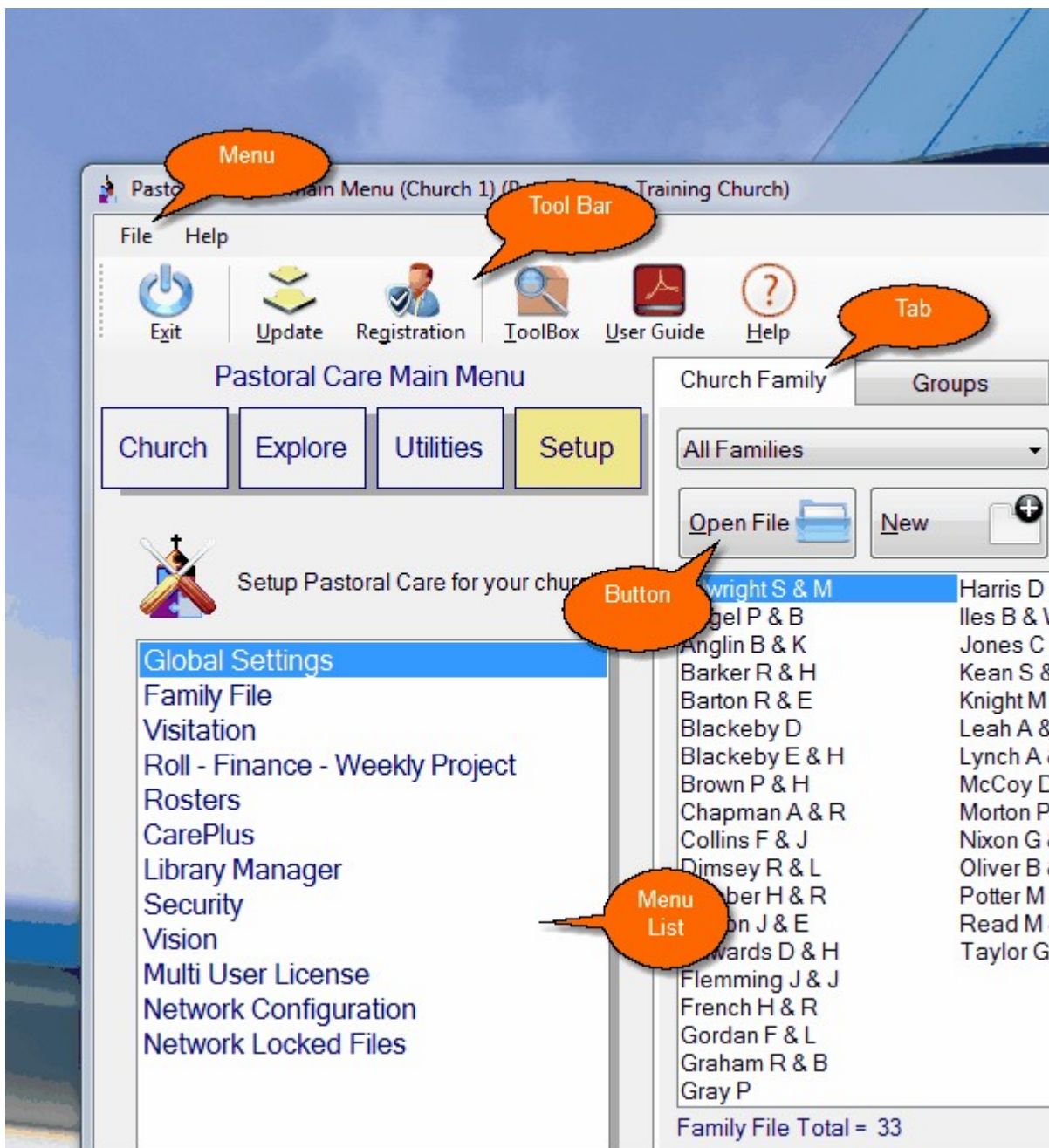


(c) 1988-2013 PASTORAL CARE MINISTRIES

This is the launch platform for all Pastoral Care features, and also gives you a look at how the rest of the program responds and functions.

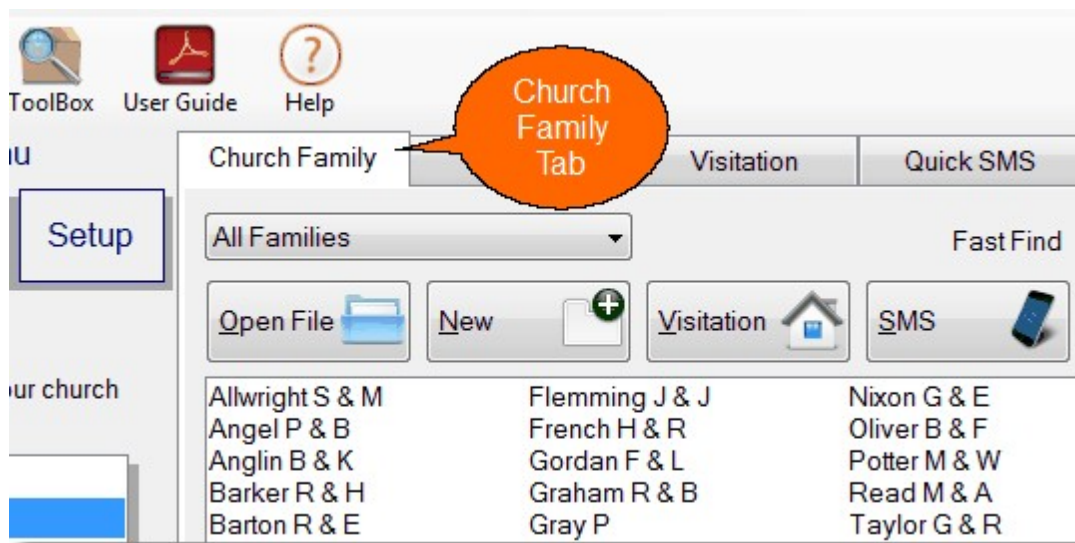
There are a few common words we use to describe different elements of the program. The main to terms that are used extensively throughout the program are Tool Bar, Menu, Menu List Tab and Button.

The picture below shows the different elements and what they are called.



Church Family Tab

The Church Family Tab on the main menu will reveal the Pastoral Care [Address Book](#). The address book allows you access to an updated family listing as well as some great communication tools associated with Family Members.



Address Book

The Main Menu of Pastoral Care has a filter based address book. This address book by default shows all families in the loaded church database.

The address book can be found on the Church Family Tab, shown below.



Click on each part of this window below to learn more about each area.

Church Family
Groups
Visitation
Quick SMS
Quick Email
Message Board

All Families

Fast Find

Open File

New

Visitation

SMS

Email

Map

Allwright S & M	Harris D & A
Angel P & B	Iles B & W
Anglin B & K	Jones C & W
Barker R & H	Kean S & J
Barton R & E	Knight M & S
Blackeby D	Leah A & M
Blackeby E & H	Lynch A & K
Brown P & H	McCoy D & B
Chapman A & R	Morton P & J
Collins F & J	Nixon G & E
Dimsey R & L	Oliver B & F
Dobber H & R	Potter M & W
Eadon J & E	Read M & A
Edwards D & H	Taylor G & R
Flemming J & J	
French H & R	
Gordan F & L	
Graham R & B	
Gray P	

Family File Total = 33

Stephen, Marion
 11 Blackdog Road
 Riddels Creek 3412
 054-33-5478

Open File

Press this button to open the selected family file in the address book. You can also Double Click on a family in the address book to open that family file as well.



New

Press the New button to add a new family file. See also [Add A Family](#)



View Filter

Select an item from the [Family Condition](#) filter to show only selected groups of people in the address book.



Address Book List

Double Click on a Family Name to open their file. Or select a name with the mouse, and press [Visitation](#), [SMS](#), [Email](#) or [Map](#) to interact with that family in other ways.

Fast Find

Start typing a surname and the Address Book name highlight will jump to the first surname that matches what you are typing. The more you type, the more accurate the find is.

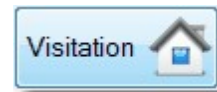
Address Book Portrait

In the lower right corner of the address book, Pastoral Care will display a Portrait of the family if one exists, or a silhouette picture you can select from the family file if there are no portrait's.



Visitation

Press this button to open the family file [Visitation Request](#) window. From this window you can create a Visitation Request, assign a Visitation Team to that request and view any previous visitation notes etc for the highlighted family.



Visitation Request

The Visitation Request feature is integrated into the new [Visitation Management](#) features of Pastoral Care. Use this feature to book a visit with a church family.

Schedule a Visit

To schedule a visit to a family, follow these steps.

1. Select the family from the Address Book
2. Press the Visitation Button (this loads the Visitation Request window)
3. Select Visitation Team, then click on to select a name of a team member to assign the visit to
4. Type in the Requested By field who has requested the Visit
5. Set the date of the request (by default this is the date you are filling in this form), not the date that you want to visit them.
6. Tick the Send Email option if you want to notify the person selected to do the visitation of a booking. The email will contain relevant contact information and visitation history.
7. Press the Create Request Button to schedule a visitation event.



Click on each area of this window shown below to find out more information on this feature.

Visitation Request
✕

Allwright S & M

Visitation team

- Pastoral
- Elders
- Wellness

Target 'Completed' visits for 2012 = 0 'Completed' visits for 2012 = 0

Current requests attached to family

Sunday, 5 August 2012

Complete

View Requests

Visitation assigned To

ToDo	Name
1	Allwright Stephen
0	Barton Ray
0	Brown Heather
0	Blackeby Frank
0	Collins Jill
0	Collins Stephen

History

Pre visitation notes

Requested by

Requested Date

Sunday . 5 August 2012

Send email upon 'Create Request'

Help

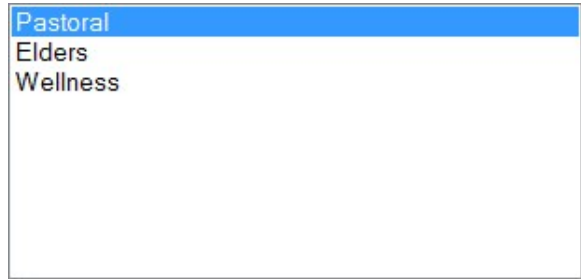
Create Request

Close

See Also [Setup Visitation](#) and [Visitation Management](#) for more information on Visitation

Visitation Team

The Visitation Team is a group of people that you have setup in both the [Setup Visitation](#) area and the [Visitation Management](#) area. After selecting a team, you can select an individual person for managing the requested visit.



If there is going to be more than one person attending the visit from the team, select only the person that will be able to contact all relevant people and keep them informed of dates and times etc.

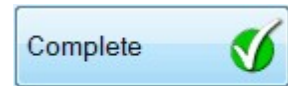
Current Requests

This box shows any current visitation requests for the selected family.



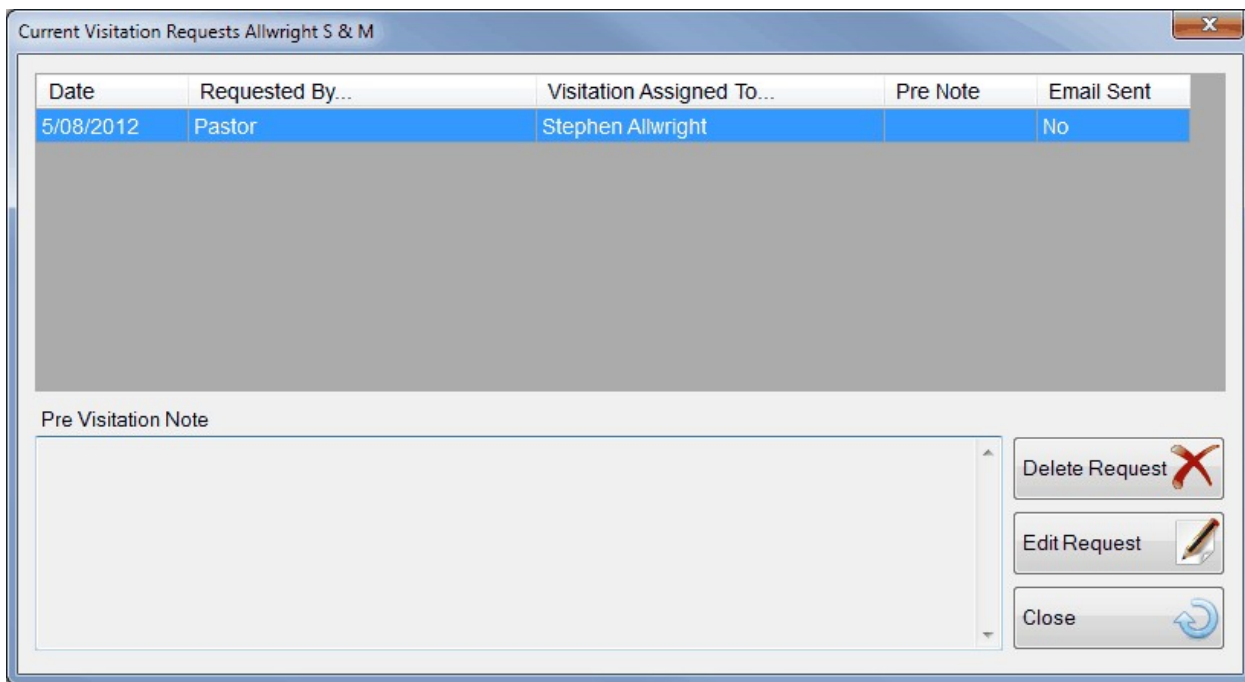
Complete

To record that a Visit is completed, select the event in the Current Requests list, and press the Complete Button.



View Requests

From this window you can see all visitation requests for the selected family (the family name is in the caption of the window). You can Delete a request by pressing the Delete Request button, or Edit a Request from this window.



Visitation Assigned To

Select a person from this list before pressing the Create Request button. This will then put a count in the ToDo column showing that the selected person has a visitation request to complete.

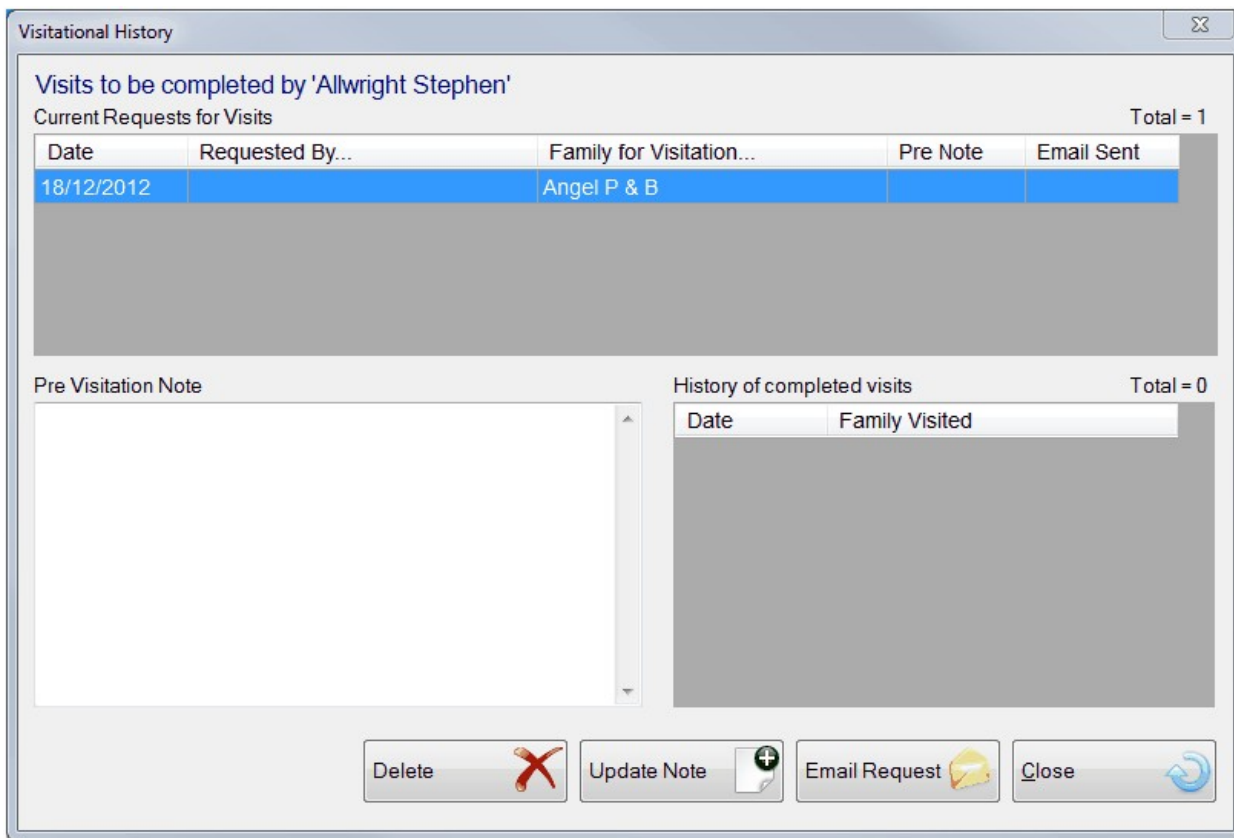
ToDo	Name
1	Allwright Stephen
0	Barton Ray
0	Brown Heather
0	Blackeby Frank
0	Collins Jill
0	Collins Stephen

Pre Visitation Notes

If there are any specific notes that are relevant to the Visitation Request, please enter them here before pressing the Create Request button.

History

Press the History Button to see the history of the selected Team Member. This is not a history of the family being visited, rather it is a history of visit's performed by the selected visitation team member.



Requested By

Enter the name of the person who requested the visit. This could be anyone. For Example, a member of your church, a Family Member, a relative or friend of the family etc.



Requested Date

Select a date for the proposed visit.



Send Email

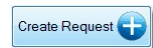
Tick the **Send Email Upon..** to let Pastoral Care send an email to the selected team member for visiting the family.



Requested by
Requested Date
Sunday . 5 August 2012
 Send email upon 'Create Request'

Create Request

When you have selected the Team, Team member and entered any Visitation Notes, and filled in the Request Date and Requested By fields, press the Create Request Button to complete the process. If ticked, an email of the request will be emailed to the team member assigned to that Visitation Request.



Close

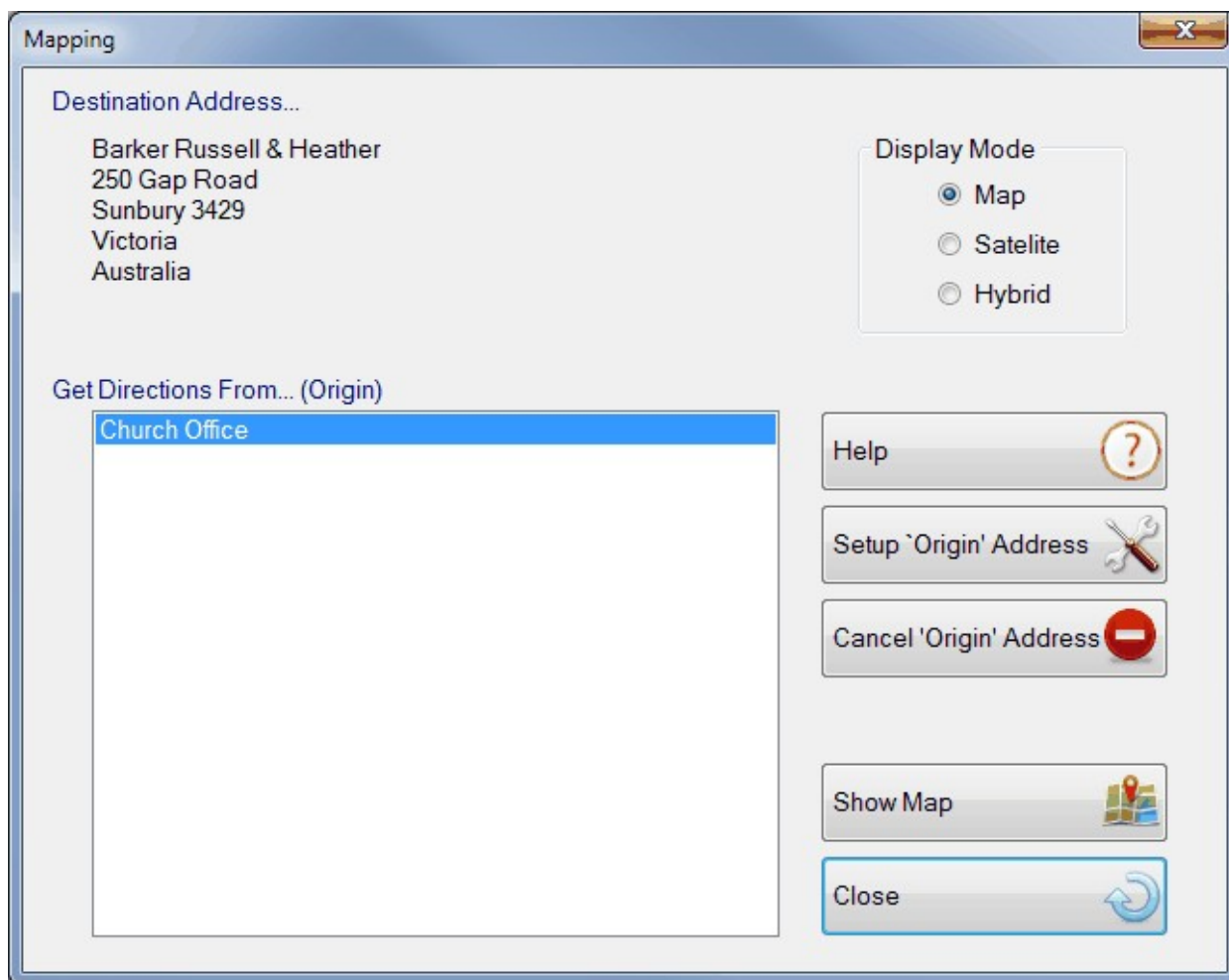
Press this button to close the Visitation Request window.



Map

Press the Map button to load the Map Window, allowing you to look up the location of the selected family on a popular web based mapping web site.





Origin & Directions

If you setup some landmarks with the Origin feature, Pastoral Care can load the web maps with directions on travelling from an origin to a family home, such as the Church to a Family Home. To setup Origin Address's (landmarks) press Setup Origin Address. You could put in places like the Church Office, Youth Hall, Church Building, Manse etc.

[See Origin Address](#) for more information...

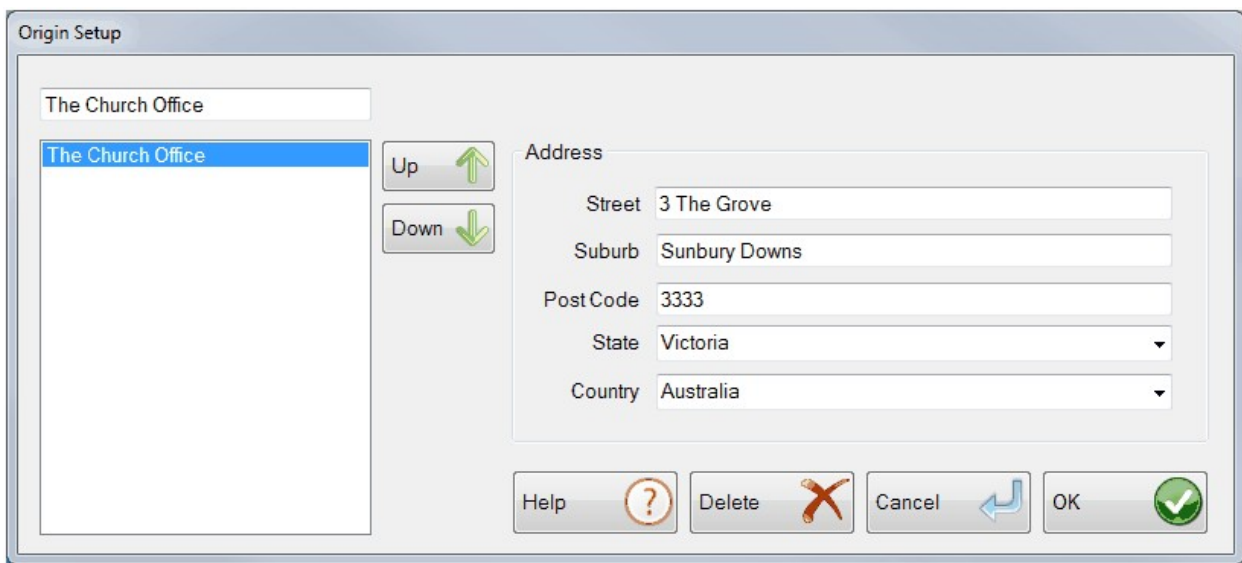
Show Map

The Show Map button will load a web page to display the selected map and directions if an origin has been selected.

Origin Address

The Origin Address information can be used for the Get Directions feature on the web site that Pastoral Care uses for displaying Map Information.

To add a new origin, type it in the entry box in the top left corner of the window and press enter. Then Select that item and complete the additional location fields to complete the Origin Address.



Visitation

Selecting the Visitation Tab on the main menu will show you all active [Visitation Requests](#).

If there are no outstanding Visitation Requests, then this list will be empty. To mark a Visitation Request as completed, simply double click on the line that you want to edit and fill in the Pastoral Visitation Complete window. (Shown Below)



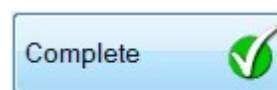
Click on each area of the window shown below to learn more about this feature.

Current Requests

This is list of all outstanding Visitation Requests for the currently selected family.

Complete

Press this button to mark the currently selected visitation as Completed. The Default option of recording the completion in the family editor should be left ticked.



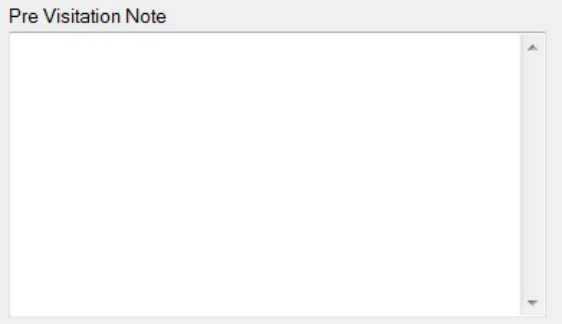
Update Family File

Leave this option ticked if you want to record a Completed Visitation in the family file also.

Update family file with a Visitation Record

Pre Visitation Note

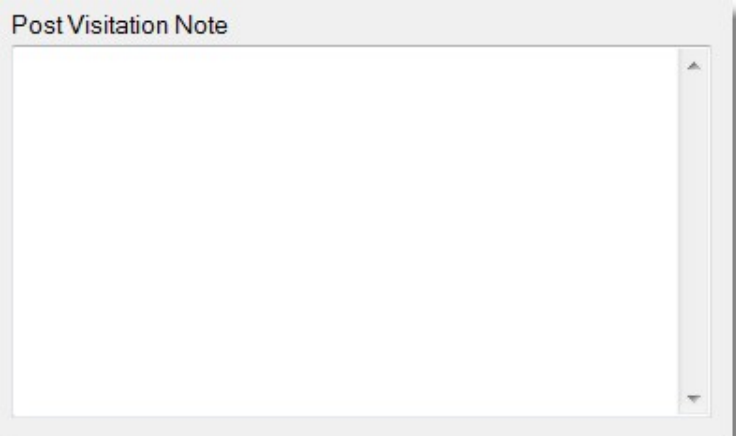
This area records any notes that are considered important to know before a visit.



A rectangular text area with a light gray border and a vertical scrollbar on the right side. The title "Pre Visitation Note" is displayed in the top-left corner of the box.

Post Visitation Note

This area is for recording any notes that need to be taken and stored for later reference after a Visitation has occurred.



A rectangular text area with a light gray border and a vertical scrollbar on the right side. The title "Post Visitation Note" is displayed in the top-left corner of the box.

Quick SMS

Quick SMS from the main menu has one function only. To SEND text messages to SMS lists. If you have not setup any SMS lists, you will be unable to send an SMS from this area.

To send a quick SMS to an SMS list, simply select the List, Type the message, perhaps use the Given and or Surname fields in the message for that personal touch, and press [Send SMS](#) to complete the Send. The SMS [Schedule Message](#) feature allows you to schedule a text message to be sent later.

For more advanced SMS features see [SMS Manager](#)



Click on each part of this window below to learn more.

Church Family
Groups
Visitation
Quick SMS

Select list to send to Double click a list name to view members

All Church List

Leadership List

Short List

Youth List

Given

Surname

Clear

Spell

Characters : 0

Txt Messages : 0

Enable SMS Scheduling

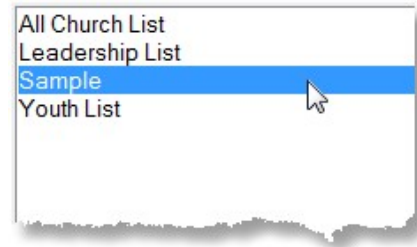
03:00 PM

Saturday , 11 August 2012

Send SMS

Select List

Select the list that you want to send a quick SMS to.



Given

Insert the Given Name of the recipient in the message. This is ideal for personalising each message.



Surname

Insert the Surname of the recipient in the message. This is ideal for personalising each message.



Clear

Erase the message you have type to start again!



Spell

Access the Spell Checker Settings



Compose

Use the area here to enter your message. Remember that using the [Given](#) and [Surname](#) objects you can personalise each message.

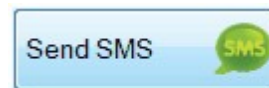
Schedule Message

Choose a date and time in the future to send your message. See [Scheduling](#) for more details on the SMS schedule feature.



Send SMS

Press this button to send your quick SMS to the selected list. The following control window opens up before the messages are sent.



See also [Quick SMS](#) for information on sending a quick SMS to an SMS List.

Quick SMS
✕

Close

Send

Tracking

Queue

Help

Smsglobal Status
 Connection Established

Return ID
 123456812

Send	Type	Surname	Given	Phone Number
<input checked="" type="checkbox"/>	Personal Mobile	Allwright	maz	041234567890
<input checked="" type="checkbox"/>	Personal Mobile	Angel	Peter	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Anglin	Brent	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Anglin	Katey	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Anglin	Mathew	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Anglin	Levi	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Anglin	Kerryn	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Barton	Big Ray	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Barton	Mum	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Barton	Ernie	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Barton	Karren	041234567890

Tagged Total = 106

Current Message

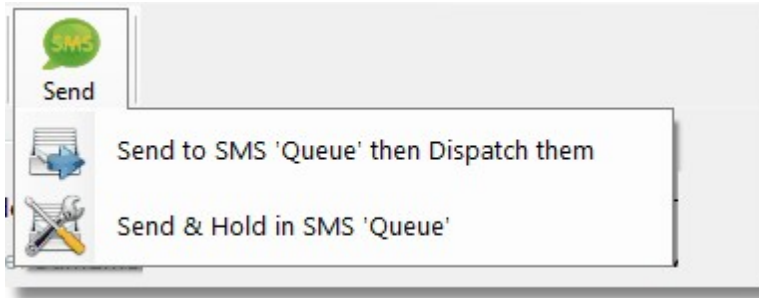
Account Details
 Credit Available : \$27.68
 Txt's Available : 346
 Cost per Txt : \$0.08

	Tagged	Txt's to Send	Cost
People :	106	106	\$8.48
Tracking :	0	0	\$0.00
Total :	106	106	\$8.48

Send

When you press the Send Icon on the toolbar, the following options open up for you to select.



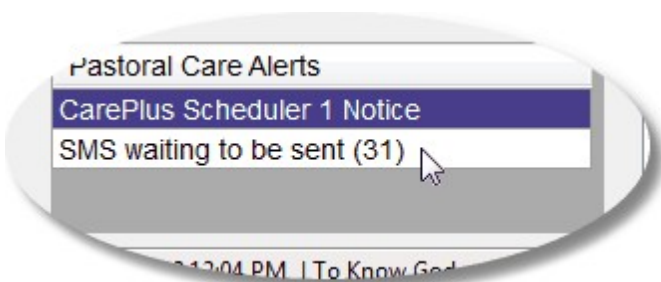


Send to Queue and Dispatch

This option sends the SMS messages immediately. In either case, all SMS messages must go via the new Pastoral Care [SMS Queue](#) program. This program handles SMS messages and allows control / use of Pastoral Care itself to remain with the user while messages are being sent.

Send and Hold in SMS Queue

This option sends SMS messages to the [SMS Queue](#) program, and holds the messages to be sent later. If you send using this method, Pastoral Care will place a reminder on the main menu that SMS messages are ready to be sent.



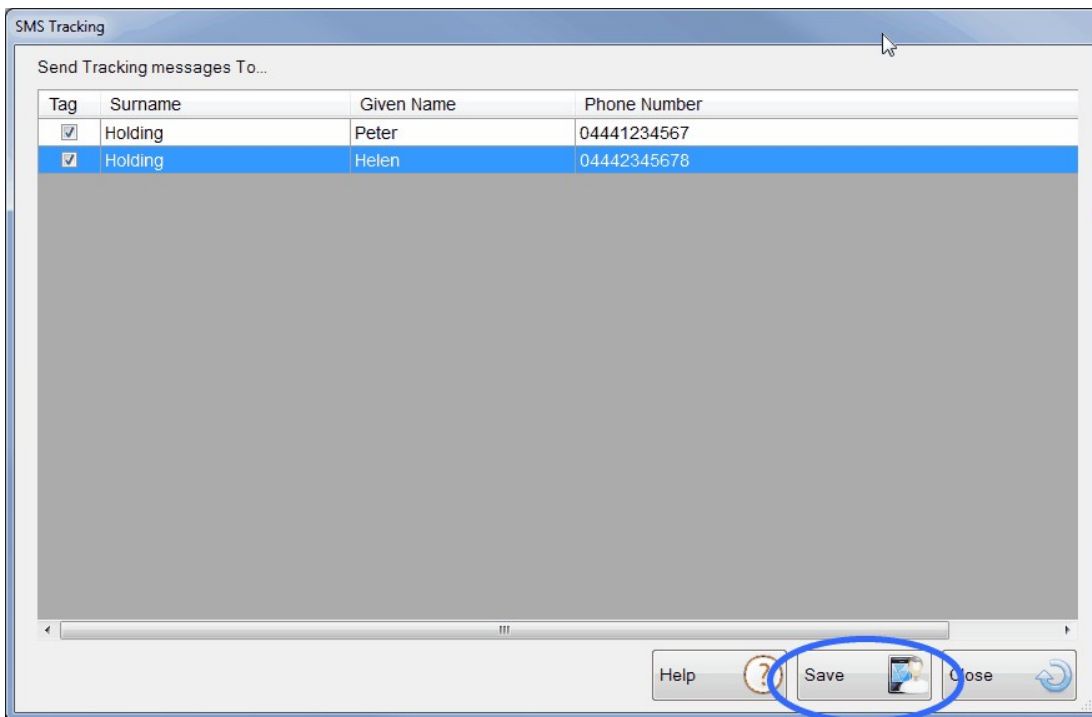
Tracking

Tracking allows you to enable a blind CC of the messages sent from Pastoral Care. See [SMS Tracking](#) in the Setup area of Pastoral Care for information on setting up Tracking Mobile Numbers. IN the SMS Manager, press Tracking on the toolbar, and tag the people that you want to receive a copy of the messages being sent.



Save Settings

Pressing Save on the bottom of the Tracking Window sets Pastoral Care to save the ticked names here so they are automatically used next time you use SMS messaging.



Queue

The SMS Queue area is in fact a new program that is automatically controlled from Pastoral Care itself. It takes SMS messages off Pastoral Care, and sends them on either later (manually) or immediately (automatically).



To open the SMS Queue, simply select the SMS Queue Icon. The Following window opens up. We have shown the SMS queue with some messages ready to send, that have not yet been sent.



Click on each part of the SMS Queue below to learn more.

Send	Status	Created	Cost	From	To	Scheduled	Message
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Allwright Stephen	03/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Angel Belinda	04/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Angel Peter	02/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Brent	12/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Katey	04/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Kerryn	04/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Levi	03/08/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Mathew	12/03/2012 (12:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Barton Ernie	03/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Barton Mum	04/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Barton Karren	05/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Barton Big Ray	04/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Blackeby Dot	04/08/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Blackeby Frank	03/04/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Blackeby Heather	04/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Blackeby Helen	01/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Brown Heather	20/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Brown John	01/12/2012 (12:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Brown Joshua	14/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Brown Peter	11/08/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Chapman Adrien	05/08/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Chapman Hannah	01/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Chapman Ruth	04/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Collins Fred	05/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Collins Jill	02/02/2012 (12:43 PM)	hello

List

Send	Type	Surname	Given	Phone Number
<input checked="" type="checkbox"/>	Personal Mobile	Allwright	maz	041234567890
<input checked="" type="checkbox"/>	Personal Mobile	Angel	Peter	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Anglin	Brent	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Anglin	Katey	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Anglin	Mathew	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Anglin	Levi	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Anglin	Kerryn	041234567890

This list has all list members ticked to receive an SMS. You can manually untick individual members if you want to leave some people off the SMS distribution.

Quick Email

Quick Email from the main menu has one function only. To SEND an email message to an Email list. If you have not setup any Email lists, you will be unable to send an Email from this area.

Church Family
Groups
Visitation
Quick SMS
Quick Email

Select list to send to Double click a list name to view members

All Church List
Leadership List
Youth List

Subject

Given

Surname

Spell

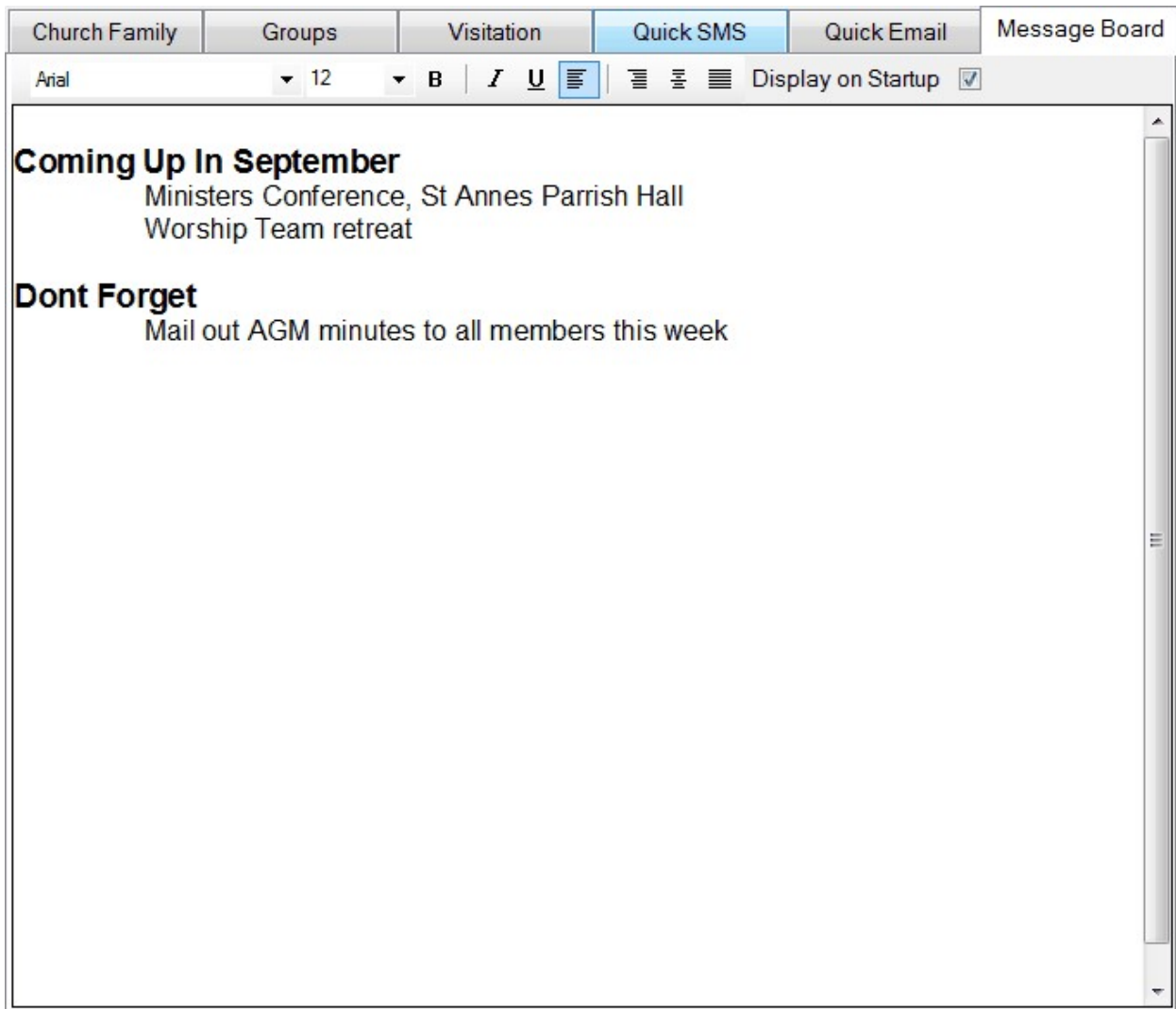
Type Email Body in here.

Simply select a list, type your email and press Send! No fancy formatting or other features like images available

here, simply a text based email. For more advanced email, see [Email Manager](#)

Message Board

Enter messages intended for other Pastoral Care users. If you tick the option for Display on Start-up, then this window is automatically displayed each time Pastoral Care starts.



Groups

Press the Groups tab on the main menu opens up a quick view of all available groups. With this feature, you can filter for any of your Pastoral Care Groups such as Status Codes, Ministries, Family and Individual Groups, Flexi Fields, Relationships, Occupations, Medical etc. Once filtered for a group (such as Status) then all status groups are listed on the left, and if you click on a group, the participants of that group will be shown on the right hand side.



The following window is the groups window, click on each part of this window to learn more.

Main Menu Groups Tab

Church Family **Groups** Visitation Quick SMS Quick Email Message Board

Status Total = 4

Open File Edit Report SMS Email Map

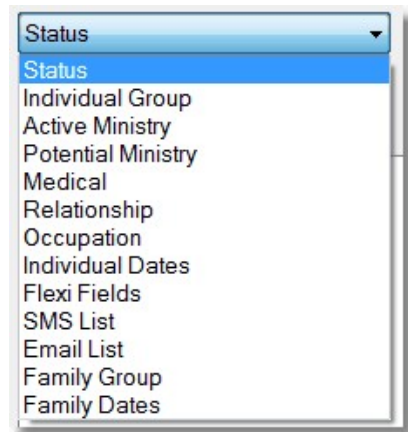
Deacon
Elder
 Committed Attender
 Occasional Attender

Blackeby Dot
 Chapman Adrien
Knight Mike
 Knight Sue

Mike, Sue
 Michaela, Rachael, Laura, Mathew
 89 Jack St
 Keilor Heights 3191

Filter

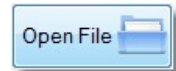
Choose a filter from the available Pastoral Care groups lists. This will restrict the view of available groups and people based on your selection.



Open File

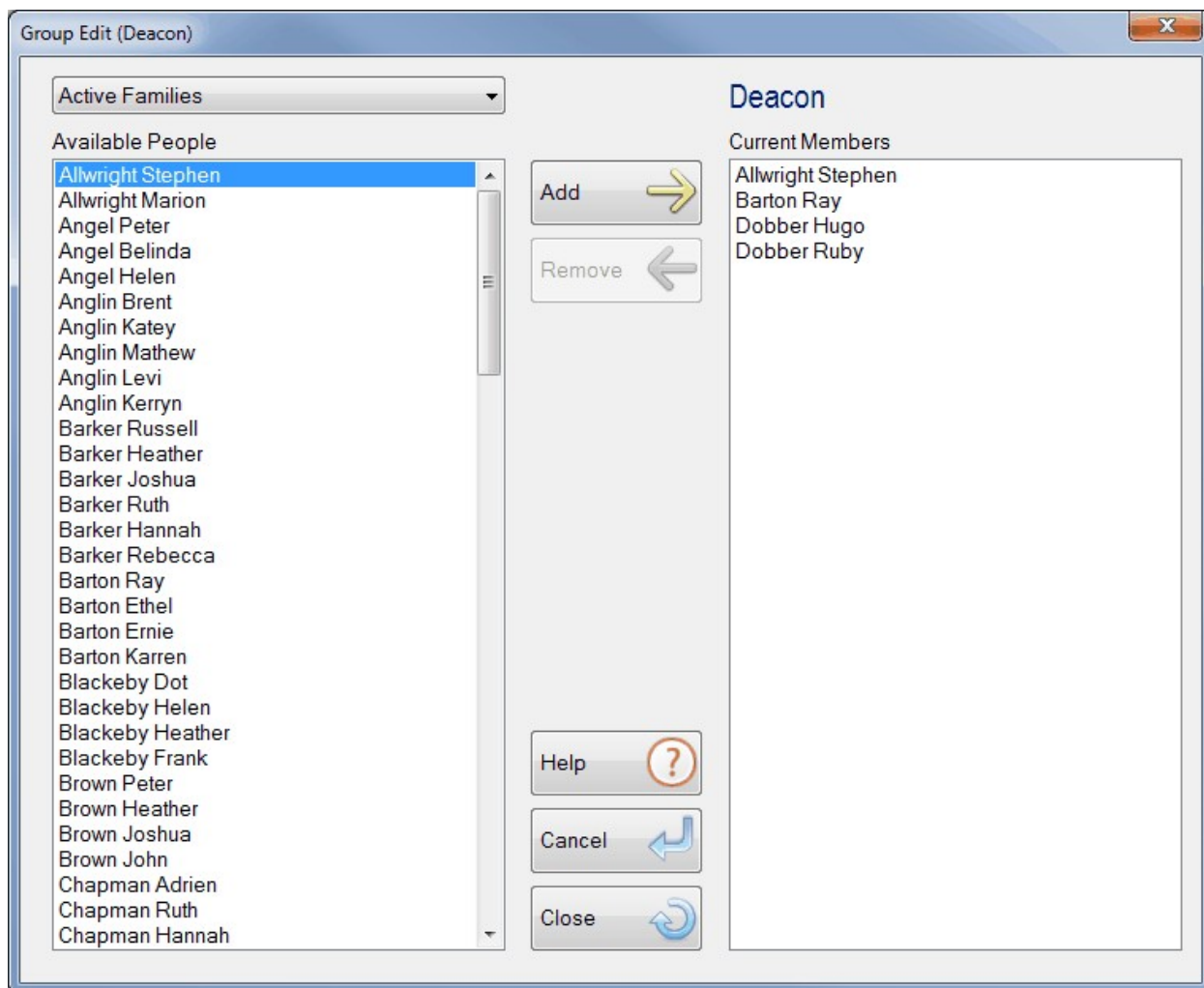
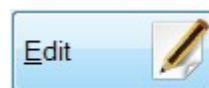
Press the Open File button to open the selected family file on the currently highlighted person.

Note: You can open a family file by also double clicking on their name.



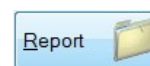
Edit

Edit the currently selected group. This allows you to add or remove people from the currently selected (filtered) group. To add a person, double click a name on the list in the left hand pane, to remove a person double click on their name in the right hand pane.



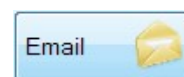
Report

Press the report button to generate any standard or custom Pastoral Care report on all the people in the currently selected group. This bypasses the normal report filters process, as the filters are set for the current group selected.



Email

To email groups of people, press the Email Button shown left. See also [Email](#) for more details on the workings of this feature.



Map

Press the Map button to load the current person / family address into a popular web based mapping program. See also [Map](#) for more details.



Main Menu Toolbar

The Main Menu Tool Bar has some often missed buttons on it. Take a minute to review these important features.



Click on each icon on the picture below for more details.



When Pastoral Care is in cloud Mode the following options are also displayed on the toolbar. Click for more information...



Registration

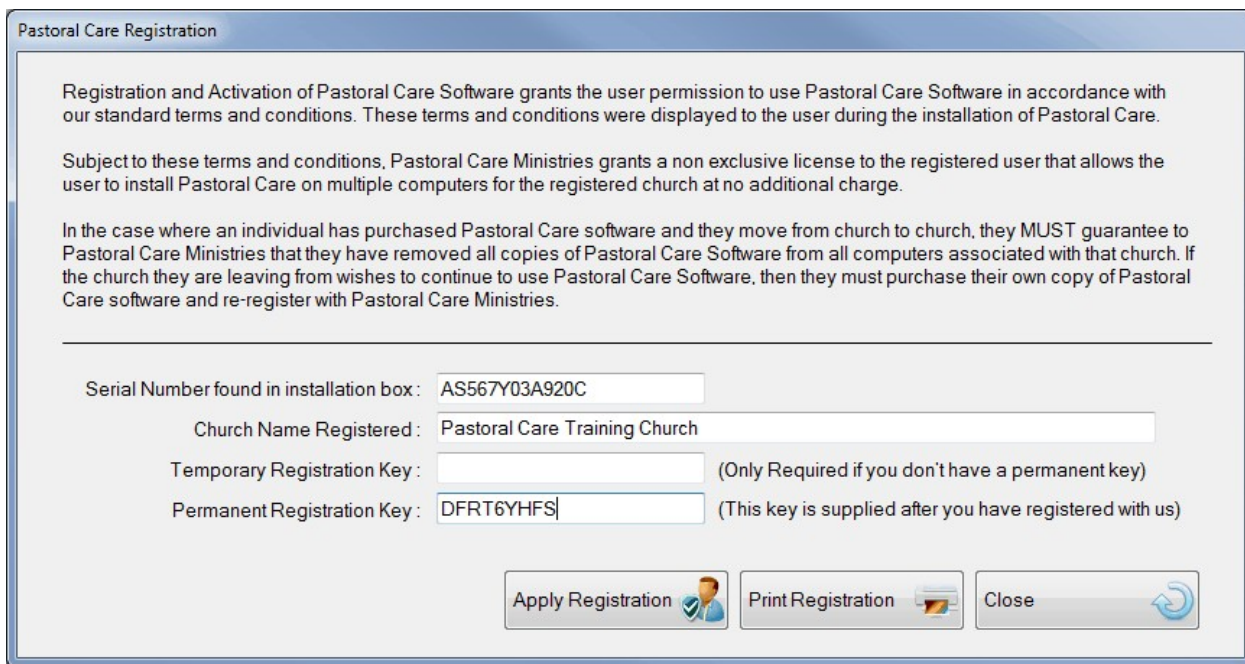
Pastoral Care software must be registered and activated for continued use. The process locks your purchased software serial number to your church name and protects our product from being used outside of the license conditions.



To find out your registration status, click on the Registration Icon on the main menu toolbar.

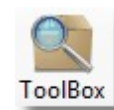
Registration Window

Once you have registered with us, we will send you a Permanent Registration Code, this along with your Church Name and Serial Number MUST be entered in the Registration window on all copies of Pastoral Care installed by your church. Please note, our generous licensing model allows you to install Pastoral Care on as many computers as you need for your church. Pastoral Care must not be given away to another church!



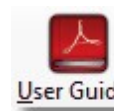
Toolbox

The Toolbox is available from just about all areas of Pastoral Care. Click [Toolbox](#) for more information on what this feature is used for.



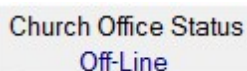
User Guide

Our complete User Guide is available in the program folder for Pastoral Care 12. This is a PDF format and can be printed, or used on your computer. Since the document contains hyperlinks in it for locating different areas of the program, using the manual on a computer is highly recommended.

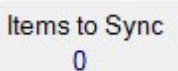


Cloud Alerts

There are two items of information displayed on the main menu toolbar when you are in cloud mode.



The status of the "church office" shows you the status of your Cloud Host program. This is usually installed on a computer that is on most of the time at your church office.



The number of items to synchronize are shown here.

Cloud Sync

Pressing the Cloud Sync icon on the main menu toolbar will open up the Cloud Sync window in Pastoral Care. This is used to show any changes that need synchronizing across your connected guest connections..



Click on each part of the Cloud Sync window below to learn more about this feature.

The screenshot shows a window titled "Cloud Sync Information" with a close button in the top right corner. Below the title bar, there is a message: "On exiting Pastoral Care all alterations are automatically synced with the church office". Underneath this message is a table with two columns: "Data Waiting to Sync with Church Office" and "Date Created". The table contains one row of data: "Allwright a & b" and "10/03/2013 06:09 PM". At the bottom of the window is a toolbar with six buttons: "Help" (with a question mark icon), "Log Info" (with a cloud icon), "DB Info" (with an information icon), "Delete" (with a red X icon), "Sync Now" (with a circular refresh icon), and "Close" (with a blue circular arrow icon).

Data Waiting to Sync with Church Office	Date Created
Allwright a & b	10/03/2013 06:09 PM

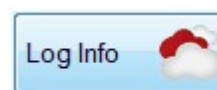
Data Waiting

This area shows any data that is set for synchronizing between the church office and other remote computers.

Data Waiting to Sync with Church Office	Date Created
Allwright a & b	10/03/2013 06:09 PM

Log Info

The log file can be displayed by pressing the Log Info button. This can be useful in seeing the activity occurring between your remote connections and the church office.



Cloud Log

Cloud Host Log

Legend: No Cloud Update Required Cloud Updated Master Church Database Updated

Date	Log
10/03/2013 07:08 PM	Cloud Update Completed - No Update Required
07/03/2013 11:48 AM	Cloud Update Completed - No Update Required
06/03/2013 08:00 PM	Cloud Update Completed - No Update Required
06/03/2013 07:00 PM	Cloud Update Completed - No Update Required

Family Files Awaiting Conflict Resolution

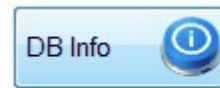
Date of Conflict	Family Name

Conflict files are created when two people update the same data remotely in which the church office needs to run the Conflict Resolution program to ensure no data is lost.

Close

DB Info

Pressing the DB info button displays a window that gives you information on the version data and time of your database files. This window also tells you when a new database update exists on the cloud.



Cloud Database

The Cloud Database is only updated as required. The database is divided into sections, each section is only updated as required. Shown below are the dates and times of each section update.

If the dates are newer on the Cloud Database all that's required to update the Currently Loaded Database is to exit and re-enter Pastoral Care.

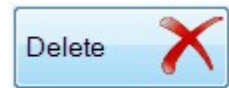
DataBase Section	Currently Loaded Database	Database on Cloud
Global DataBase	05/03/2013 8:12:44 PM	10/03/2013 6:08:10 PM
Family DataBase	06/03/2013 8:15:55 PM	10/03/2013 6:08:10 PM
Family Portraits	05/03/2013 8:12:44 PM	05/03/2013 8:12:44 PM
Custom Letters	06/03/2013 7:15:46 PM	06/03/2013 7:15:46 PM
Custom Directories / Reports	05/03/2013 8:12:45 PM	05/03/2013 8:12:45 PM

A newer database exists on Cloud

Close

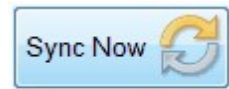
Delete

Pressing the delete button effectively removes the selected update of "data waiting" that is currently selected in the [Data Waiting](#) list.



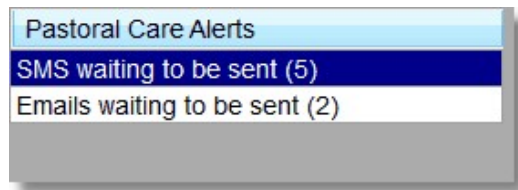
Sync Now

Press the Sync Now button to force Pastoral Care to update the Cloud Host information. Cloud Host information is normally transferred to the church office computer when Pastoral Care is shut down.



Alerts

In the lower left corner of the Main Menu of Pastoral Care you will see the Alerts section. If there are any items shown in this list, you can double click on them to take you to the relevant area to action that alert. In the example above, you can see that we have 5 SMS messages in the SMS queue ready to send, and 2 emails in the Email Queue ready to send.



Pastoral Care 12

Pastoral tools for todays church.

Chapter 8

Church Tab



(c) 1988-2013 PASTORAL CARE MINISTRIES

Church Introduction

The Church Tab give you access to All areas where you enter data about your church.



Click on each of the Menu Headers (Explore, Utilities & Setup) as well as the menu items to learn more about each area.

The screenshot shows a web application interface. At the top, there are four menu headers: 'Church' (highlighted in yellow), 'Explore', 'Utilities', and 'Setup'. Below these is a main content area with a header 'Enter data about your church' and a colorful icon of a church building. A dropdown menu is open, listing the following items: 'Add a Family' (highlighted in blue), 'Search For a Family', 'Visitation Management', 'Roll', 'Financial Records', 'Weekly Statistics', 'Rosters', 'CarePlus', and 'Library Manager'.

Add A Family

Use the Add a Family selection on the Church Tab to open the Family Editor ready to enter a new family. When you press the Add A Family menu list option on the main menu, (Or press the New button on the [Family File Toolbar](#)) 2 windows open. The Family Editor and the Add New Family pop up window.

Simply fill in the Add New Family window with as much information that you have handy, and press the Add Button to push all the data entered back into the Family Editor. From the Family Editor, you can enhance the information in the Family File with added Group, Participation and other personal properties for each family member.

Steps to enter a family into the Add New Family Window

- Type in the main family Surname <press enter>
- Enter the first adults name in the New Name Entry box <press enter>
- Enter the next person's name in the New Name Entry Box <press enter>

(Note you will be asked if this entry is a child or a 2nd adult, choose according to the person entered)

- Add the Residential Street Address and other information on the form
- Click on each name entered and fill in any personal information for each of the entered family members
- Press the Add Button (shown below) to finish this process and add the family to the Family File Editor, ready for more information to be saved if available.



See also [Family File Full Screen](#)

Family File Full Screen



Click on each area of the Family File Editor to learn more about each feature. See Also [Add A Family](#)

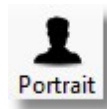
Family File Toolbar



Please Note: some of the icons below can be clicked on for more information.



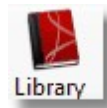
Exit the family editor. Note all changes will be saved.



Add or edit photos of the current family / individual



Create a new blank family file ready for data entry. Pressing this will move to a new blank record AND open up the pop up [family data entry screen](#).



Check Library Records for the current family



Save the current edit's. Note, save is automatic once you move to another family file or exit the family editor



View and modify Visitation notes etc on the current family



Delete the current Family. This will delete all additional information like Rosters, Roll etc for the current family and cannot be undone



Send a message(s) to selected family members. See [SMS](#)



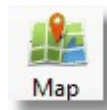
Move to the previous family



Send an email to selected family members See [Email](#)



Search for a family



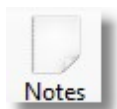
View the current family on a popular internet based street mapping web site



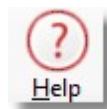
Move to the next family



Access some quick features



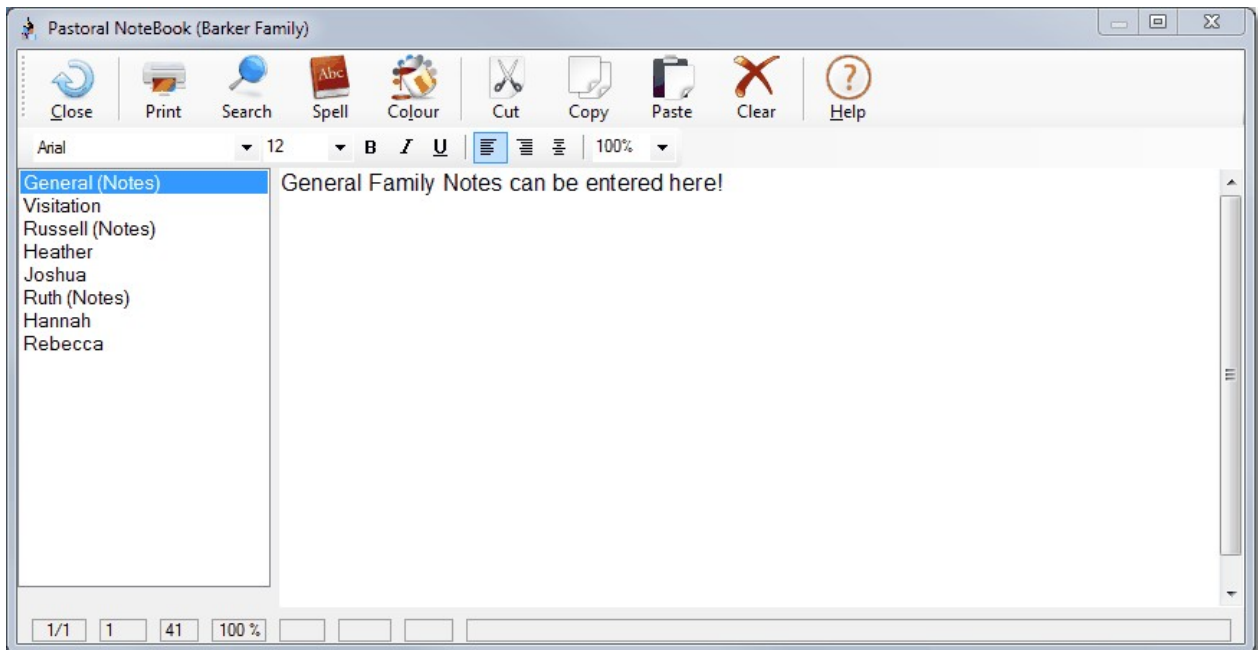
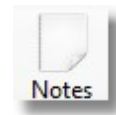
Access the Family Notes editor



View this context sensitive help system

Notes

The Notes area of Pastoral Care allows you to record for every family, some common topic notes, as well as a special notes folder for each family member.



General

Enter general family notes in this area.

Visitation

Any Visitation Notes can be entered here. These are shared with the Visitation features of Pastoral care

Individual Notes

You can see that each family member is listed. Pastoral Care creates a notes area for each individual person, where you can store personal notes that relate just to one person.

Portrait

Pastoral Care lets you save Photo Information in the family File. These photos can be Family Photos, Individual Photos or any combination thereof. See also [Family Portrait Screen](#) for full details on each of the options in this area.

Adding Photos to Pastoral Care

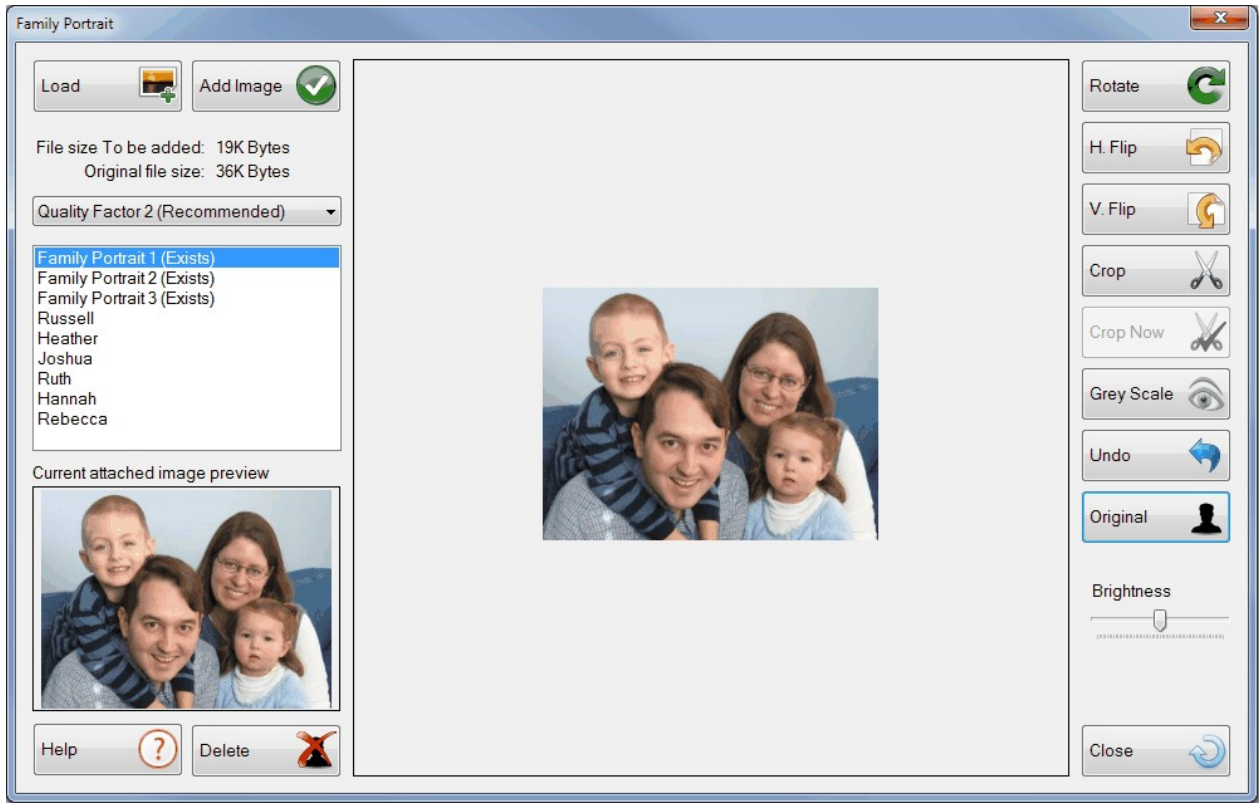
1. Take Family and Individual Photos, Save them with surname and name in the filename to make locating them easier
2. Open a family to add photos to
3. Press Portrait on the Family Editor toolbar
4. Press Load on the Family Portrait window
5. Browse to the photo file that you want to add to the current family
6. Select the Position to add the photo to (Family portrait 1,2 or 3, or an Individual Portrait)
7. Press Add Image

Family Portrait Screen

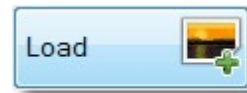


Click on each part of the Family Portrait Screen to learn more about this feature.

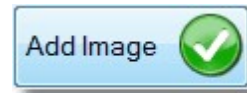
See Also [Portrait](#) for steps on how to add photos to a family file.



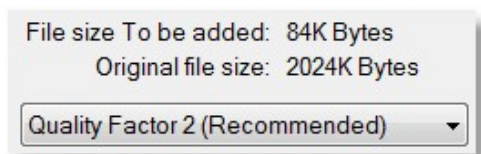
Load an image from a file to be added to the family as a portrait



Add the selected (and modified if you have done any modifications) photo to the [Selected Slot](#) position for the photo to be saved against.

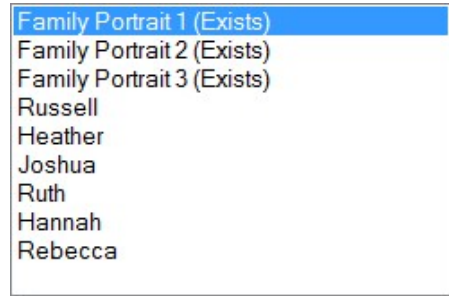


We recommend a Quality Factor of 2 for most photos. A Quality Factor of 5 will produce a larger file size than a Quality Factor 1 option. The original and projected file save size is shown above the Quality Factor Selection.



Select the location to ADD a photo to. The positions available are Family Portrait's 1,2 and 3, as well as one for each individual.

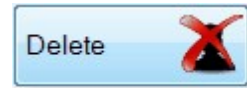
We recommend that you settle on a standard for each of the Family Portrait positions. For example the Parents for Portrait 1, Kids only in Portrait 2, and the whole family in portrait 3.



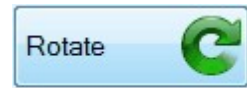
This shows a preview of the selected Family/ Individual Selected Portrait.



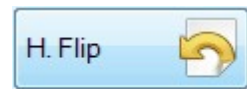
Delete a picture attached to the selected Family Portrait or Individual position.



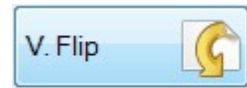
Rotate the image 90 Degrees to the right. Keep pressing this to continue the rotation in 90 degree steps.



Flip the picture (mirror) horizontally.



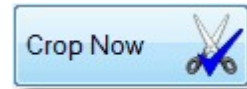
Flip the picture (mirror) vertically.



Select an area of the picture to crop.



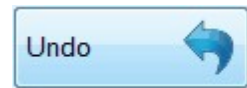
After marking an area with Crop, press the Crop Now button to complete the crop.



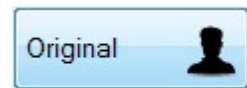
Convert the picture to grey tones only.



Where available, you can press this to undo the last edit to the picture. You can also use the [Original](#) button if Undo is not available.



Use this to reload the original picture and discard all of your changes.



Adjust the brightness of the picture.



Library

If the current family have any Library Assets out on loan, then you can view them from here.



Visitation

The Visitation Button on the toolbar opens the Pastoral Care Visitation Request window. See [Visitation Request](#) for more details on this.



SMS

The SMS button on the Family File Toolbar takes you to a common SMS area, but it also pre-loads the mobile phone information from the family file you were in at the time. See [SMS](#) for more information on this feature.



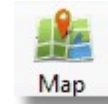
Email

The Email button on the Family File Toolbar takes you to a common Email area, but it also pre-loads the email address information from the family file you were in at the time. See [Email](#) for more information on this feature.



Map

If you already have street address information, then Pastoral Care can open up a popular mapping program on the WEB and show you where that family file address is. You can also set Landmarks for getting directions from. See [Map](#) for more information.



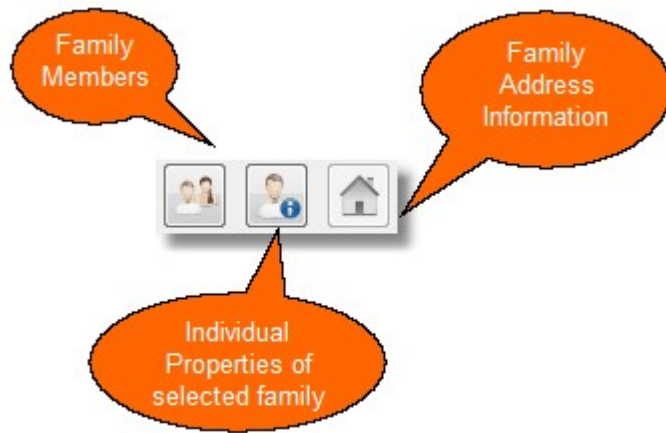
Toolbox

Access some common quick features throughout different areas of Pastoral Care. Click [Toolbox](#) for more information on what this feature is used for.



Family File Quick Buttons

The family file quick buttons under the Family File toolbar (top left of the family file editor) are buttons to quickly access the 3 main common areas of the Family Editor.



Add Family Popup Entry



Click on each item of the window below to learn more about adding a new family using this form.

Add New Family

Surname <input type="text"/>	Family Condition Active
------------------------------	--------------------------------------

<p>New Name Entry</p> <p><input type="text"/> Add +</p> <p>Adult</p> <p><input type="text"/> Edit ✎</p> <p>Child</p> <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> <p>Delete ✕</p> <p>Up ↑</p> <p>Down ↓</p>	<p>Individual Condition Active</p> <p>Gender Unknown</p> <p>Occupation <input type="text"/> ...</p> <p>Title <input type="text"/></p> <p>Preferred Given Name <input type="text"/></p> <p>Other Surname <input type="text"/></p> <p>Birth Date <input type="text"/></p> <p>Mobile Phone <input type="text"/></p> <p>Personal Email <input type="text"/></p>
--	---

<p>Residential Address</p> <p>Street <input type="text"/></p> <p><input type="text"/></p> <p>Suburb ...</p> <p>Postcode <input type="text"/> Map <input type="text"/> Ref <input type="text"/></p> <p>State <input type="text"/></p> <p>Country <input type="text"/></p>	<p>Home Phone <input type="text"/></p> <p>Family Mobile <input type="text"/></p> <p>Family Email Address <input type="text"/></p>
--	---

Help ? Cancel ✕ Add +

Entering Names

When entering names in the Family Editor, or in the pop up Add New Family form, you simply start typing in a name into the New Name Entry box and press the Add button, or the Enter Key on your keyboard.

In the example right, the name Joshua is about to be added as an Adult.

In the example (right) we have 2 adults, and 2 children. If you have made a mistake in the order of people, simply select a name by clicking on the name, and press the Up and Down button.

To change the spelling of a name, select the name and press Edit.

Add Family Individual Properties

When entering a new family using the Add Family pop up screen, you can enter the following Individual Properties against each selected name.

(You will need to select a name before individual property fields can be filled in.)

Individual Condition	Active	▼
Gender	Female	▼
Occupation	Accountant	▼ ...
Title	Mrs	▼
Preferred Given Name	Jen	
Other Surname		
Birth Date	11/08/1962	49 years
Mobile Phone	0444-123-456	
Personal Email	jen@hotmail.org	

Build Button



Whenever you see a Build Button as shown above, this is indicating that the list next to that button can be added to without going to the Setup area of Pastoral Care. In this case, press this button to simply add another Occupation to the list.

Birth Date

When entering Birth Dates in Pastoral Care, you can enter a Day, Month and no year. This allows Pastoral Care to still be able to analysis on who's birthday is coming up etc, but also keep age off the agenda! To this, use the format as shown below.

For 11th of September 1990, to enter this normally you would enter 11/09/1990. To miss the age component, replace the year with 4 letter x's. Like: 11/09/xxxx

Pastoral Care is system date format aware, so if you are in a timezone that uses mm/dd/yyyy, then Pastoral Care will be expecting this format when you enter dates.

Individual Condition

The following built in conditions can be applied to Individuals. See also [Filters](#) for information on how you can filter reports for these conditions.

ACTIVE

An active individual is a person who is available to all areas of Pastoral Care for reporting, analysis and actions (such as Reports, Rolls, Rosters Tagging etc).

PRIVACY REQUEST

A family or person flagged for privacy request are by default included in all areas of Pastoral Care. However an option

exists on all [Filters](#) windows allowing you to turn on the Privacy Request option. Turning on Privacy request in filters will have the effect of excluding people with a privacy request flag from the reports or area you are working in at the time.

PROSPECT

A prospect is a person that the church has some contact with, however they are not regular attendees of the church. Prospects are automatically excluded from reports and any area that can use filters. You can include prospects by ticking the Prospect Families option on any [Filters](#) window.

ARCHIVE

The Condition called Archive allows you to keep a family or individual on the database, however by default an archived family or individual is excluded from all areas of Pastoral Care. You can include them by ticking the Archive option on any [Filters](#) window.

CONTACT

A person who is a contact is typically a person who is perhaps related to someone who comes to church, but they themselves do not come to church. A contact by default is excluded from all Pastoral Care reports and features. You can include contacts by selecting contacts in any [Filters](#) area.

In the family editor, if a person is a contact a notation next to their name of (Contact) will appear

DECEASED

A person who is deceased is kept on the database for reference, however they are excluded from all areas of the program.

If a person is deceased, a notation of (Deceased) will appear next to their name.

Surname

The Family Surname is an important key field in Pastoral Care. For most families, this is simple to enter, just the family surname. If one person uses another surname, no problems, individuals can have an individual surname as well as the family surname.

If you have a blended family where half of the people have one surname, and the other half have another surname, then you will still have to choose which surname to use for the Pastoral Care database to record that family against.

In reports, individual surnames can be printed when they are present, so this does not often cause any serious problems.

Family Main Phone

The Main Family Phone number is considered the primary point of contact for the family home. There are other phone fields for each individual that can be found in the [Personal Details](#) section of the family file.

Family Mobile

The Family Mobile number is used for a common Mobile Number for the family if one exists for the family.

Family Email

The Family Email Address is used for a common email contact for the family if one exists.

Family Condition

The following built in conditions can be applied to Families. See also [Filters](#) for information on how you can filter reports for these conditions.

ACTIVE

An active family is a family who is available to all areas of Pastoral Care for reporting, analysis and actions (such as Reports, Rolls, Rosters Tagging etc).

PRIVACY REQUEST

A family flagged for privacy request are by default included in all areas of Pastoral Care. However an option exists on all [Filters](#) windows allowing you to turn on the Privacy Request option. Turning on Privacy request in filters will have the effect of excluding people with a privacy request flag from the reports or area you are working in at the time.

PROSPECT

A prospect is a family that the church has some contact with, however they are not regular attendees of the church. Prospects are automatically excluded from reports and any area that can use filters. You can include prospects by ticking the Prospect Families option on any [Filters](#) window.

ARCHIVE

The Condition called Archive allows you to keep a family or individual on the database, however by default an archived family or individual is excluded from all areas of Pastoral Care. You can include them by ticking the Archive option on any [Filters](#) window.

Address and Family Contact Fields

When entering a new family using the Add New Family pop up form, you can only enter a residential address. If you only have a PO box, do not enter this here, there is a postal address field that can be edited from the Family Editor under Address.

You can also add the main Home Phone Number (See also [Family Main Phone](#)), a Family Mobile Number, and a Family Email Address.

Family fields are meant for information that is relevant to all people in that family. For Individual mobiles, emails etc,

you can enter individual information in the Personal Details area.

Suburb

When entering an Address, Pastoral Care allows you to select a suburb already setup. If you are entering an address that does not have the suburb entered in the setup area yet, press the build button next to the Suburb Field to add a new suburb on the fly.

The Build Button



The Build Button where available lets you add items to some lists in Pastoral Care

Family File Data Areas

The Family File Data Areas are where all the data on the family is stored.

Address information, contact information, group participation, medical data, ministry participation etc.



Click on each area in the graphic to the right to find out more.

Note the highlight colour. This colour indicates that information exists in those areas.

F	Family Members
I	Personal Details
F	Address
I	Status
I	Individual Groups
I	Ministry
I	Medical
I	Relationship
I	Individual Dates
I	Flexi Fields
I	SMS List
I	Email List
F	Other Contact
F	Family Group
F	Family Events
F	Family Date
F	Visitation

Family Members

The Family Members data area is where you can add people to the family, view a small memo on the family, see their Family Portrait and move people both within the Family File, or to another family.

This is accessed by selecting Family Members from the [Family File Data Areas](#) menu.



Click on each area below to find out more on the Family Members area.

Family Members...

New Name Entry

Add

Adult

- Russell
- Heather

Child

- Joshua
- Ruth
- Hannah
- Rebecca

Family Portrait

File Memo

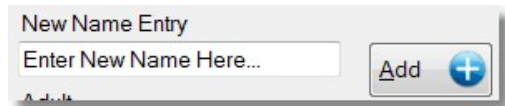
Family Portrait 2

File Created	4/08/2012
File Last Edit	13/08/2012

New Name Entry

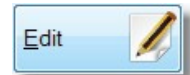
Type in a new family member name and press the Add Button, or press the Enter Key.

If a person goes into the wrong family spot, simply use the Order Buttons to shuffle people around in the family order.



Edit

Press this to edit the currently selected person's name.



Delete

Delete the currently Selected Person. Note, this cannot be undone, and deleting a person removes all associated records in Rosters, Rolls and Finance etc.



Order

Use these buttons to move people around the family file into different positions.

We suggest you settle on a standard so that viewing the family file becomes second nature.

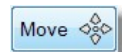
Something like:

- Father
- Mother
- Eldest Child
- 2nd Eldest Child
- etc



Move

The Move Button is used when moving people out of the family file into their own file. This should only be used when a person is physically leaving the family home and going to live somewhere else. Just because a child may be deemed an adult after say age 17, or 21 etc, does not mean you should put them in their own file. We suggest for best data management leaving everyone living at the same address in the same family file. This may not suit the way you manage people, and if that is the case, you are welcome to do things your way of course!

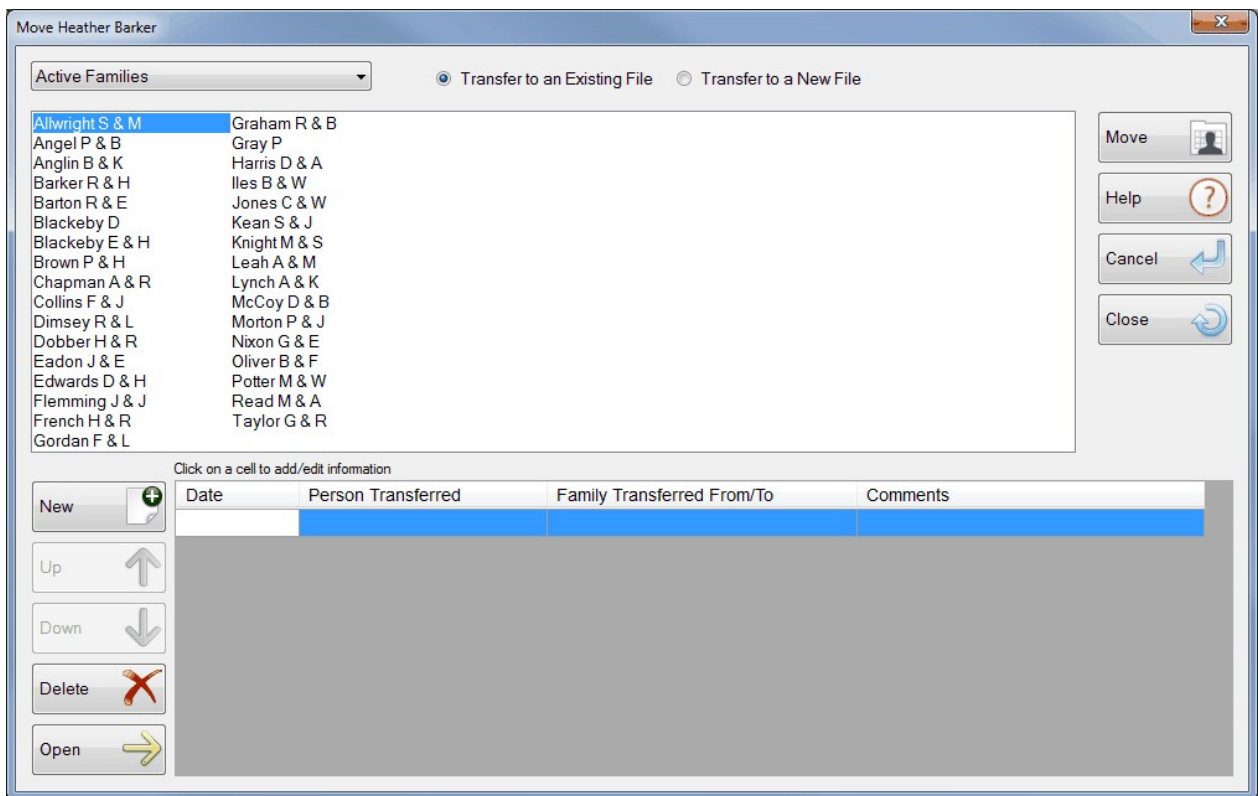


Here are few ways to use Move...

Getting Married

1. Transfer a person out of their family file into their own family file and setup the home address for the lucky couple
2. Locate the spouse in another family, and transfer her to her new husband!
3. If in the process of transferring one of the married couple out of their own file, you are going to leave the family file empty, you will need to create a dummy person first and promote them using the Up/Down arrow buttons to the head of that family before transferring the "last" person out of the file. You can then delete the remaining Dummy family left.
4. Note; always do a backup before major shuffling, not because we expect things to go wrong, more because if something does go wrong, it can be a mess to repair!

Move Control Window



The name of the person you are moving is in the window caption (In our example above, Heather Barker) . You can choose to transfer Heather to an existing file, or a new file.

The list at the bottom of this screen records any history of moves with the current family allowing you to see who has come and gone from where!

Audio

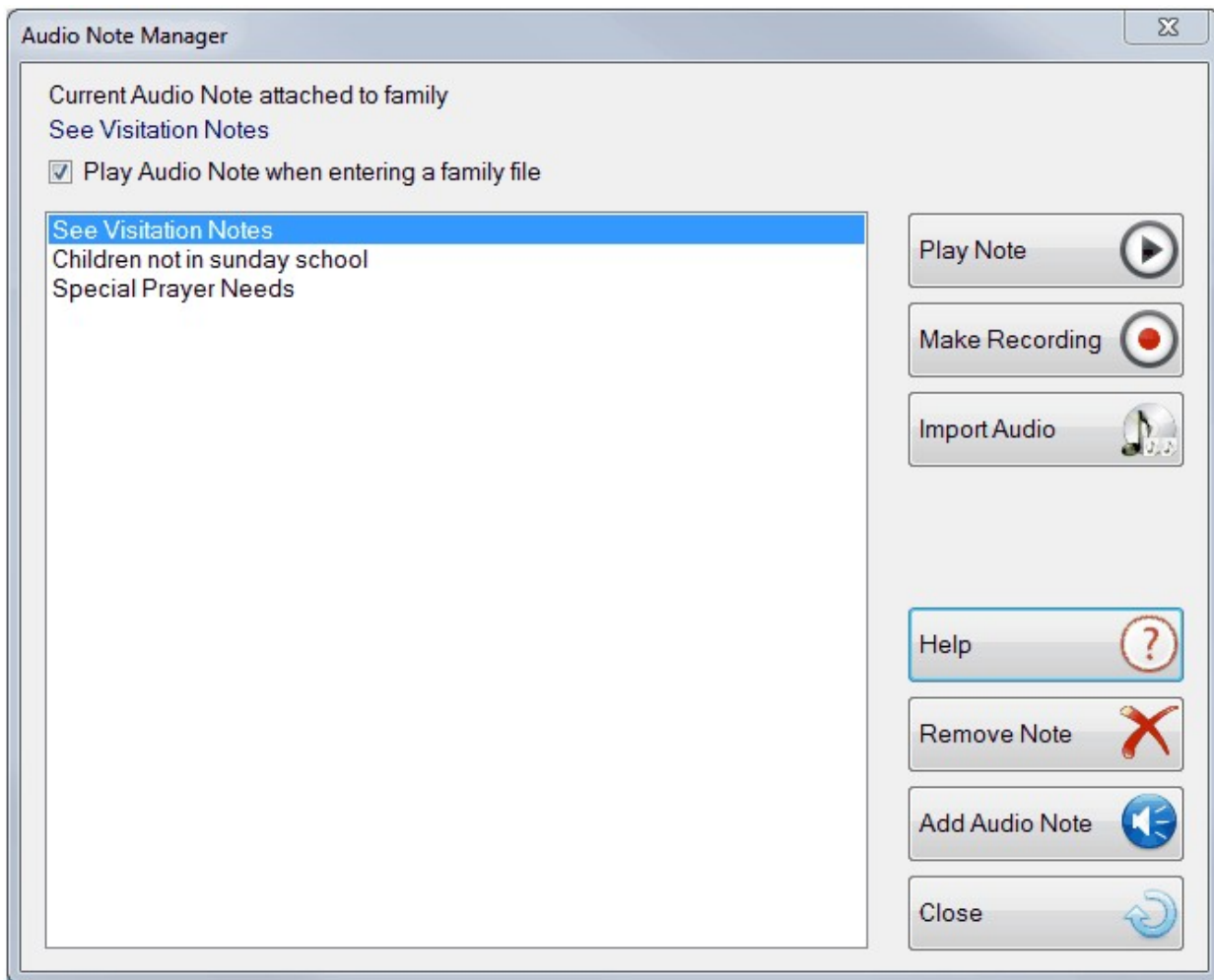
Pastoral Care allows you to add an Audio Prompt to a family file that is played each time the family file is loaded. This allows you to put information right into the foreground. You can press the Record button to record your own, or Import some notes from another location, such as earlier Pastoral Care version files. The supported file format option is Windows Wave file.

Simply Select the file that you want to play for the current family, and press Add Audio Note button.

Note, you will have to tick the option 'Play Audio Note when entering a family file ' to allow Pastoral Care to play the selected file.



Click on each part of the Audio Note Manager to learn more about this feature.



Attached Note

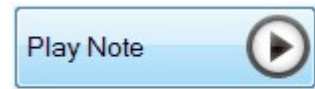
This shows you the audio note attached to this family file.

Available Audio Notes

This is the list of available audio notes available to select for a family.

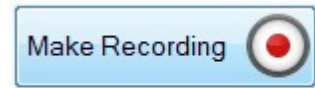
Play Note

Press the Play Note button to play / preview the selected audio note.



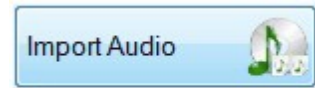
Make Recording

Press the Make Recording button to create your own audio file.



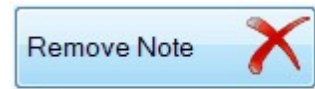
Import Audio

Press this button to import an audio file as an audio note.



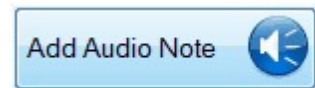
Remove Note

Press the Remove Note button to remove a note from the family. This does not delete the audio note file itself.



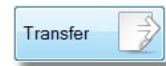
Add Audio Note

Press the Add Audio note button to add (link) an audio note to the current family.



Transfer

Transfer an entire family to another church database. This is useful if you are using multiple databases to manage another parish etc, and a family is moving to that parish. Only main contact and personal contact information is transferred.



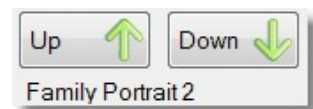
Not Transferred

The following information is not transferred to another database.

Roll	Relationship
Rosters	Flexi Field
Finance	SMS and Email Lists
Status	Family Notes
All Group Participation	Visitation
Medical	

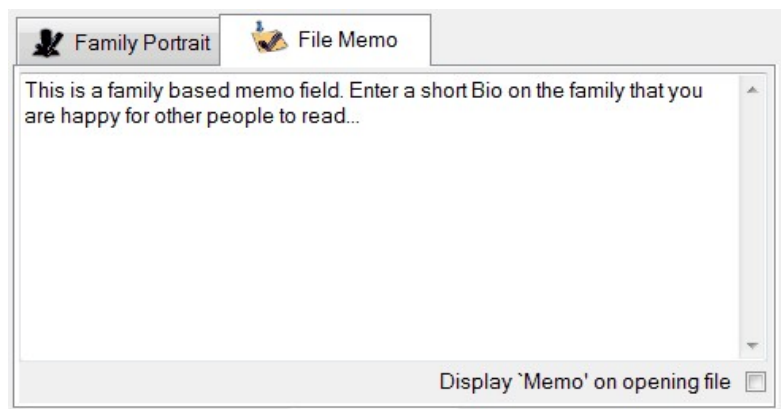
Portrait Order

When there is more than one portrait to display, you can use the Up / Down arrow keys under the portrait display field to change the display picture for the family. This is also the picture that will be displayed on the main menu. See Also [Portrait](#) for more information on setting up pictures of your family members.



Memo

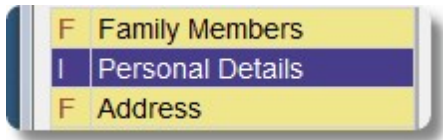
The Family Memo field allows you to enter a small biography if you like of the family. This can be ticked to always display when the family file is loaded.



Personal Details

The Personal Details section allows you to profile each family member more accurately than just a name. the Individual Details window is shown below filled in, and following this diagram is a table of further information on each field.

This is accessed by Personal Details from the [Family File Data Areas](#) menu.




Russell's Personal Details... (Condition = Active)

Individual Condition	Active	
Gender	Male	
Occupation	Technician	Hidden <input type="checkbox"/>
Title	Mr.	Hidden <input type="checkbox"/>
Preferred Given Name	Rusty	Hidden <input type="checkbox"/>
Middle Name	James	Hidden <input type="checkbox"/>
Other Surname		Hidden <input type="checkbox"/>
Birth Date	15/07/1975 37 years	Hidden <input type="checkbox"/>
School Year		
Mobile Phone	0444-12345678	Hidden <input type="checkbox"/>
Personal Email	russell@myplace.com	Hidden <input type="checkbox"/>
Business Phone	03 5555-5555	Hidden <input checked="" type="checkbox"/>
Business Fax	03 5555 6666	Hidden <input checked="" type="checkbox"/>
Business Email	russell@myworkplace.com	Hidden <input checked="" type="checkbox"/>

Financial P.I.N. Auto Test View

Hidden Fields

Note the Hidden tick box next to many fields in the family file. Ticking one of these options will tell Pastoral Care that by default, you do NOT want that information released to other people, or printed on reports.

Individual Area	Description
Individual Condition	Set a condition for each person. This allows for filtering during reporting and other Pastoral Care operations. See also Individual Condition
Gender	Set Male - Female or Unknown. This field is now included in all filter areas for reporting and other Pastoral Care operations.
Occupation	Select an occupation. The occupation master list can be edited from here by pressing the build button next to the Occupation Field. 
Title	Choose an appropriate title for the current person. These can be setup in Settings - Family File
Preferred Given Name	If this is filled in, the preferred given name will be used on all reports and communications with that person.
Middle Name	A person's Middle name.
Other Surname	If another surname is entered here, then if selected during the reporting process, other surnames will be used instead of the family surname.
Birth Date	Enter a person's birthdate using the Date Format for your country / region settings. For the year, you can enter four of the letter 'X' to indicate that you do not have a year. For Example 11/7/XXXX Pastoral Care in this case can still do birthdate reminders etc, without calculating a person's age.
School Year	Enter the year of school a person is currently in. See also School Year Manager for information on how to index all school years up 1 at the start of a new school year.
Mobile Phone	Enter a person's Personal Mobile Phone number. This will be by default the first mobile phone number used when sending an SMS message.
Personal Email	Enter a person's Personal Email Address. This will be by default the first email address used for email communication.

Individual Area	Description
Business Phone	Enter a phone number for business contact
Business Fax	Enter a phone number for a business Fax Line
Business Email	Enter a person's Business Email Address
Financial PIN	Enter a Financial PIN number for a numbered giving envelope system. Press AUTO to assign the next available number, or press TEST to see if the number you have entered has already been assigned.

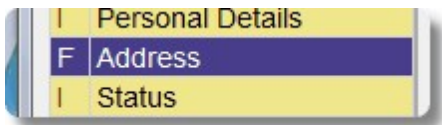
Address

The Pastoral Care Address data area allows you to store a Street Address, a different Postal Address and other Common Contact Methods for the Family. (Not individuals)

If you have only a Street Address, then there is no need to fill the Postal Address Fields. Pastoral Care will automatically use a Residential Address for mailing UNLESS a postal address exists.

As well as address data, you can enter a Family Mobile, Family Email Address (With a description like "The Smith Family" as the email description, and a Family Fax.

This is accessed by selecting Address from the [Family File Data Areas](#) menu.



Address...

Residential Address	Hidden <input type="checkbox"/>	Postal Address	Hidden <input type="checkbox"/>
Street	<input type="text" value="250 Gap Road"/>	Street	<input type="text"/>
Suburb	<input type="text" value="Sunbury"/> <input type="button" value="..."/>	Suburb	<input type="text"/> <input type="button" value="..."/>
Postcode	<input type="text" value="3429"/> Map <input type="text"/> Ref <input type="text"/>	Postcode	<input type="text"/>
State	<input type="text" value="Victoria"/>	State	<input type="text"/>
Country	<input type="text" value="Australia"/>	Country	<input type="text"/>

Family Mobile	<input type="text"/>	<input type="checkbox"/> Hidden
Family Email Address	<input type="text"/>	<input type="checkbox"/> Hidden
Description for Email Address	<input type="text"/>	
Family Fax	<input type="text"/>	<input type="checkbox"/> Hidden

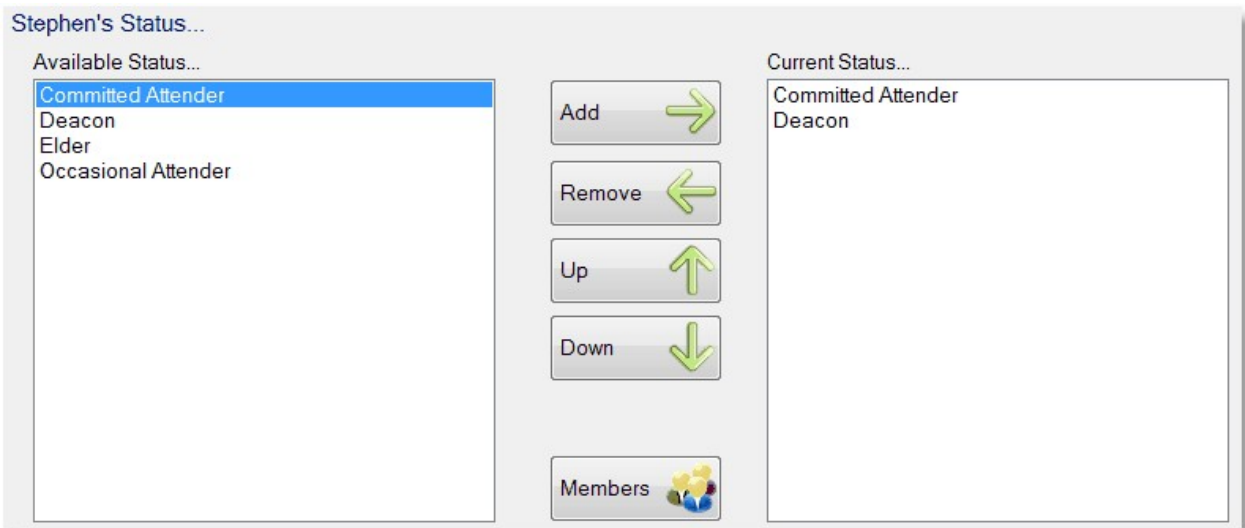


Press either of the Build Buttons to allow you to add to the list of suburb data stored in Pastoral Care

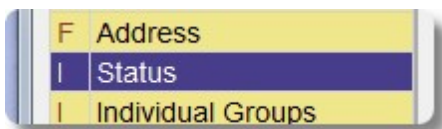
Status

The Status area in the Family Editor is where you assign different status's for individual family members.

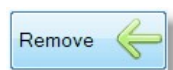
See also [Setup - Family File](#) for more information on defining family file attributes.



This is accessed by selecting Status from the [Family File Data Areas](#) menu.



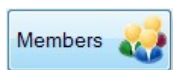
Select a Status from the list of available status's, and press Add to add that status to the currently selected person. You can also just double click on an item in the left hand list to add that to the Current Status list for the selected person.



Press the Remove button to remove a selected Status from a person. You can also double click on an item in the right hand panel to remove the selected status from the currently selected person.



Use the Up and Down buttons to change the list order for the selected status's.



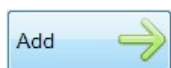
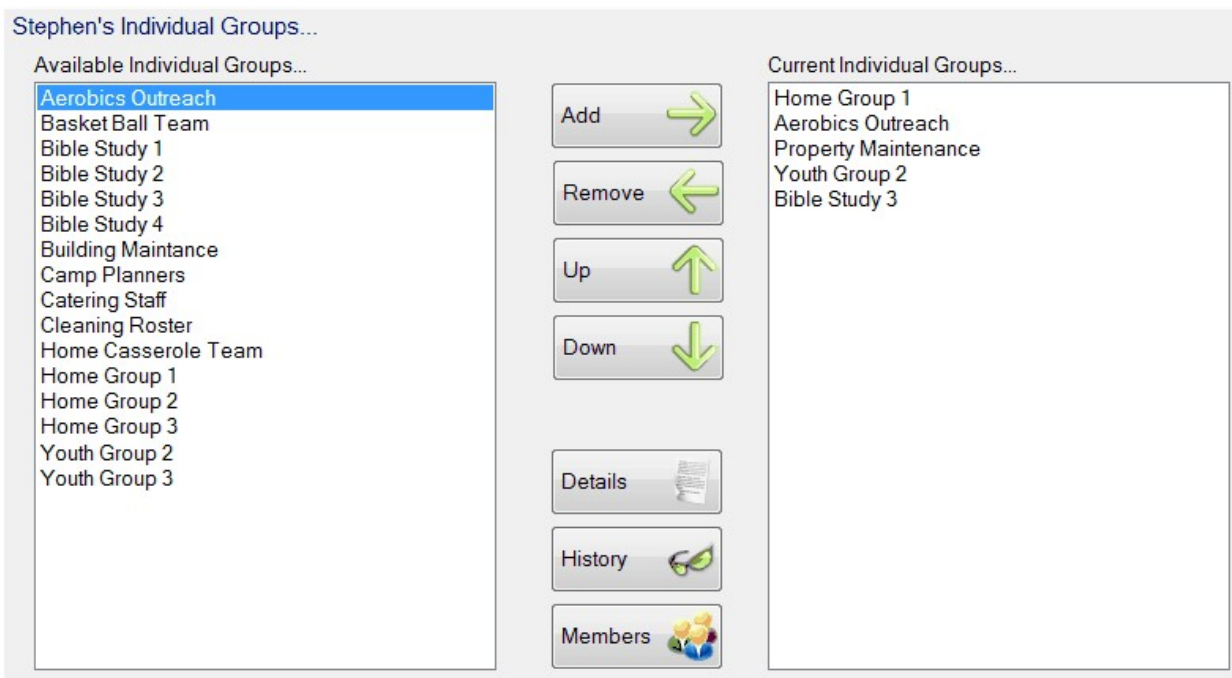
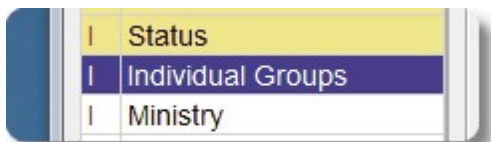
Press the Members button to see a list of all current members of the selected status.

Individual Groups

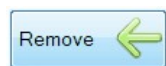
The Individual Groups area in the Family Editor is where you assign participation in a group for individual family members.

See also [Setup - Family File](#) for more information on defining family file attributes.

This is accessed by selecting Individual Groups from the [Family File Data Areas](#) menu.



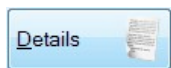
Select an Individual Group from the list of available groups, and press Add to add that group to the currently selected person. You can also just double click on an item in the left hand list to add that to the Current Group list for the selected person.



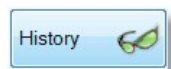
Press the Remove button to remove a selected Group from a person. You can also double click on an item in the right hand panel to remove the selected group from the currently selected person.



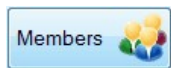
Use the Up and Down buttons to change the list order for the selected groups.



Press the Details button to see / edit Group Details. See [Group Details](#) for more on this area.



Press the History Button to see a list of dates that members joined or left a group.

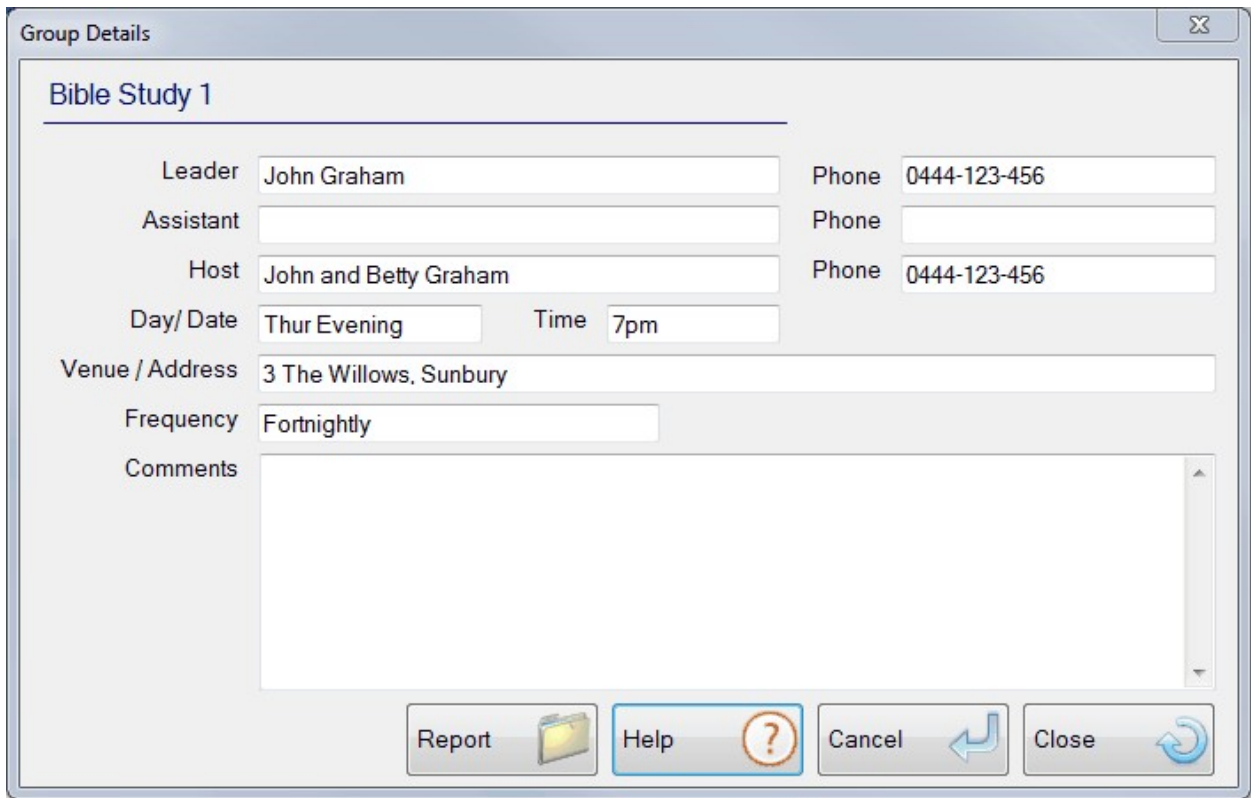


Press the Members button to see a list of all current members of the selected group.

Group Details

The Group Details window lets you enter and save information about the Group. Information such as Host Names, Address, Day and Frequency of meeting etc.

Pressing the Report button on this screen lets you create a report on the Group, (See [Group Report](#)) including the Details Information (shown below) and the members of the selected group.



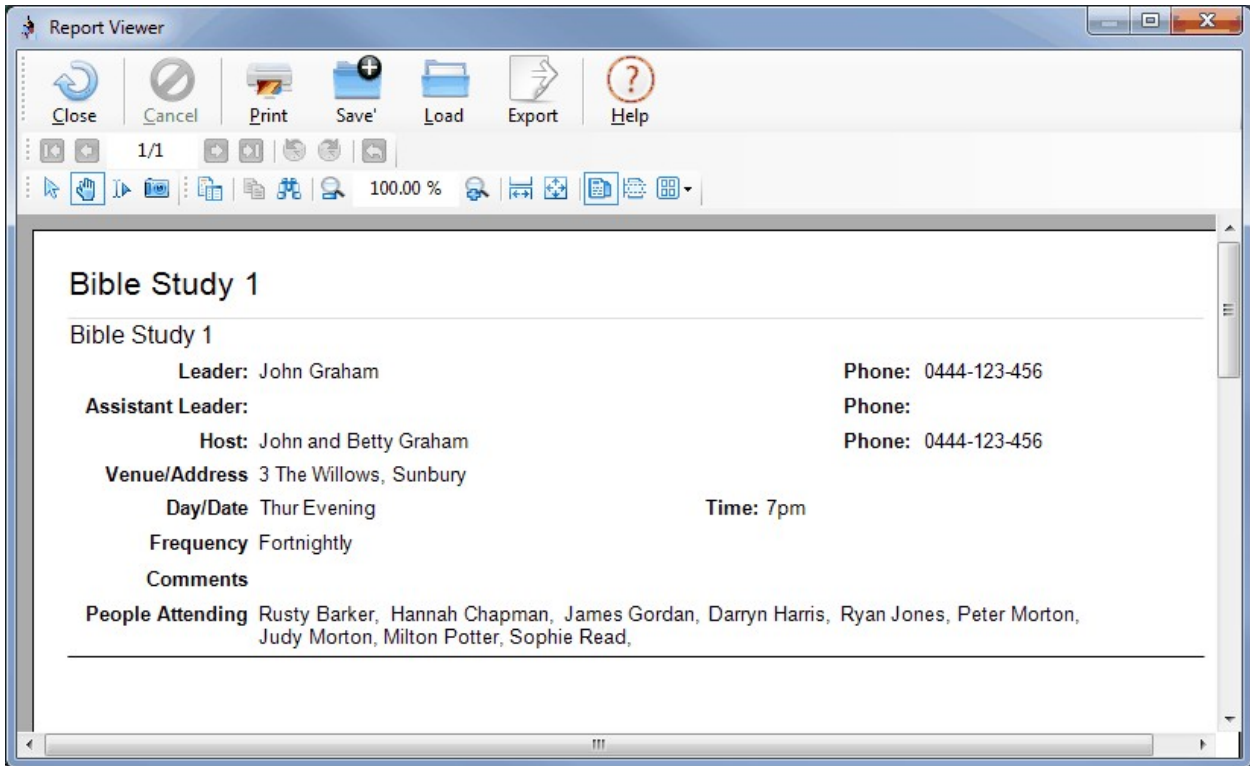
The screenshot shows a software window titled "Group Details" with a close button in the top right corner. The window contains the following fields and controls:

- Group Name:** Bible Study 1
- Leader:** John Graham
- Assistant:** (empty field)
- Host:** John and Betty Graham
- Day/Date:** Thur Evening
- Time:** 7pm
- Phone (Leader):** 0444-123-456
- Phone (Assistant):** (empty field)
- Phone (Host):** 0444-123-456
- Venue / Address:** 3 The Willows, Sunbury
- Frequency:** Fortnightly
- Comments:** (empty text area)

At the bottom of the window, there are four buttons: "Report" (with a folder icon), "Help" (with a question mark icon), "Cancel" (with a return key icon), and "Close" (with a refresh/circular arrow icon).

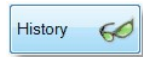
Group Report

Pressing the Report button from the Group Details window will open up the following Group Details Report.



Group History

Press the History Button to see the Date Joined and Date Left information for group members. A person joins a group in Pastoral Care when you add them to the group, and leaves a group when you remove them from a group. You can click on each date in this list to edit the date if you wish to make the date more accurate.



Group History for entering and leaving groups

Aerobics Outreach ▾

Name	Date In	Date Out
Allwright Stevo	01/01/2011	15/08/2012
Angel Helen	01/01/2010	
Anglin Brent	01/01/2010	
Anglin Katey	01/01/2010	
Anglin Levi	01/01/2010	
Barton Mum	01/01/2010	
Brown Peter	01/01/2010	
Brown Heather	01/01/2010	
Chapman Adrien	01/01/2010	
Collins Fred	01/01/2010	
Collins Stephen	01/01/2010	
Dimsey Mandy	01/01/2010	
Dimsey David	01/01/2010	
Dobber Hugo	01/01/2010	
Edwards David	01/01/2010	

To edit a date click on the date cell

Help ?
Close ↻

Ministry

The Ministry area in the family file lets you add a Ministry gift to a person. Simply select the Active Ministry box and double click on a ministry to add it, and do the same for adding a Potential Ministry. Press Members to see a list of ministry members. Use the Arrow Buttons to sort either the Active or Potential lists.

See also [Setup - Family File](#) for more information on defining family file attributes.

This is accessed by selecting Ministry from the [Family File Data Areas](#) menu.



Adding a Ministry from a person.

To Add an Active Ministry to a person, click in the Current Active Ministry area, then double click on a ministry from the Ministry List to add it.

To Add a Potential Ministry to a person, click in the Current Potential Ministry area, then double click on a ministry from the Ministry List to add it,

Removing a Ministry from a person.

To remove an Active Ministry from a person, double click on that active ministry to remove it, to remove a potential ministry, double click on that to remove it.

Russell's Ministry...

Available Ministry...

- Praise Leader
- Healing Gift
- Prayer Team
- Communion Leader
- Youth Leader
- Sunday School Teacher
- Prophecy
- Door Team
- Follow Up Ministry
- Home Support
- Preaching
- Overhead Operator
- Street Outreach Team
- Tape Ministry

Add →

Remove ←

Up ↑

Down ↓

Current Active Ministry...

Praise Leader

Add as Active Ministry
 Add as Potential Ministry

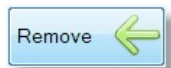
Current Potential Ministry...

Preaching

Members



Select a Ministry from the list of available status's, and press Add to add that Ministry to the currently selected Area, that is, Active or Potential Ministry, for the selected person.



Select a Ministry from the list of available Ministries (Active or Potential) and press remove to remove that ministry for the selected person.



Use the Up and Down buttons to change the list order for the selected Ministries..

Medical

The Medical area in the family file lets you add a Medical Grouping to a person. Simply select the Medical Condition and press Add, or double click on it to add it. Press Members to see a list of all people with that medical condition. Use the Arrow Buttons to sort the list of selected medical conditions.

See also [Setup - Family File](#) for more information on defining family file attributes.

This is accessed by selecting Medical from the [Family File Data Areas](#) menu.



Adding a Medical Condition from a person.

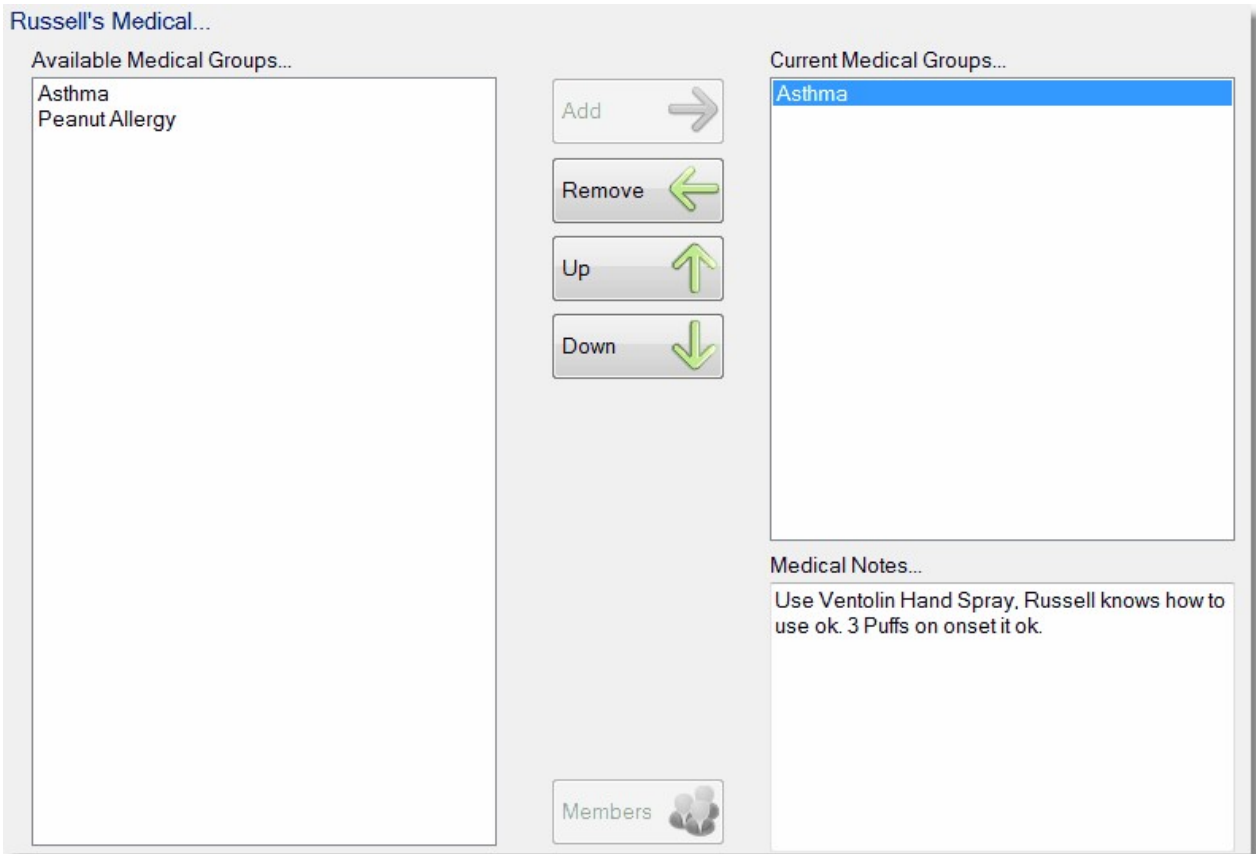
To Add a Medical Condition from a person, double click on the item in the Available Medical Groups list.

Deleting a Medical Condition from a person.

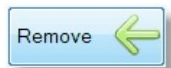
To delete a Medical Condition from a person, double click on the item to remove it from the Current Medical Groups list.

Add Medical Notes

To add specific medical notes for a person, select the medical condition from the Current Medical Groups list, and enter the notes below that list.



Select a Medical Condition and press the Add button to add that Medical Condition to the currently selected person.



Press the Remove button to remove a selected Medical Condition from a person.



Use the Up and Down buttons to change the list order for the selected Medical Condition.



Press the Members button to see a list of all current members of the selected Medical Condition.

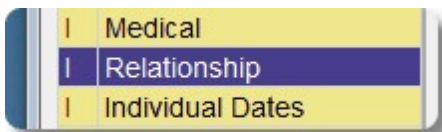
Relationship

Relationships allow you to select both a Relationship Item, and link that item for the selected person to another person in the Pastoral Care database.

The screen below shows that for Russell, we have added Real Father to his relationship data area. The next step would be to press the [Add Relationship Link](#) , and browse to Russell's Real Father to assign that relationship. This is ideal for recording separated families, or even Guardians and Grandparents that care for children in another family.

See also [Setup - Family File](#) for more information on defining family file attributes.

This is accessed by selecting Relationship from the [Family File Data Areas](#) menu.



Click on each part of the Relationship window below to learn more.

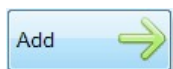
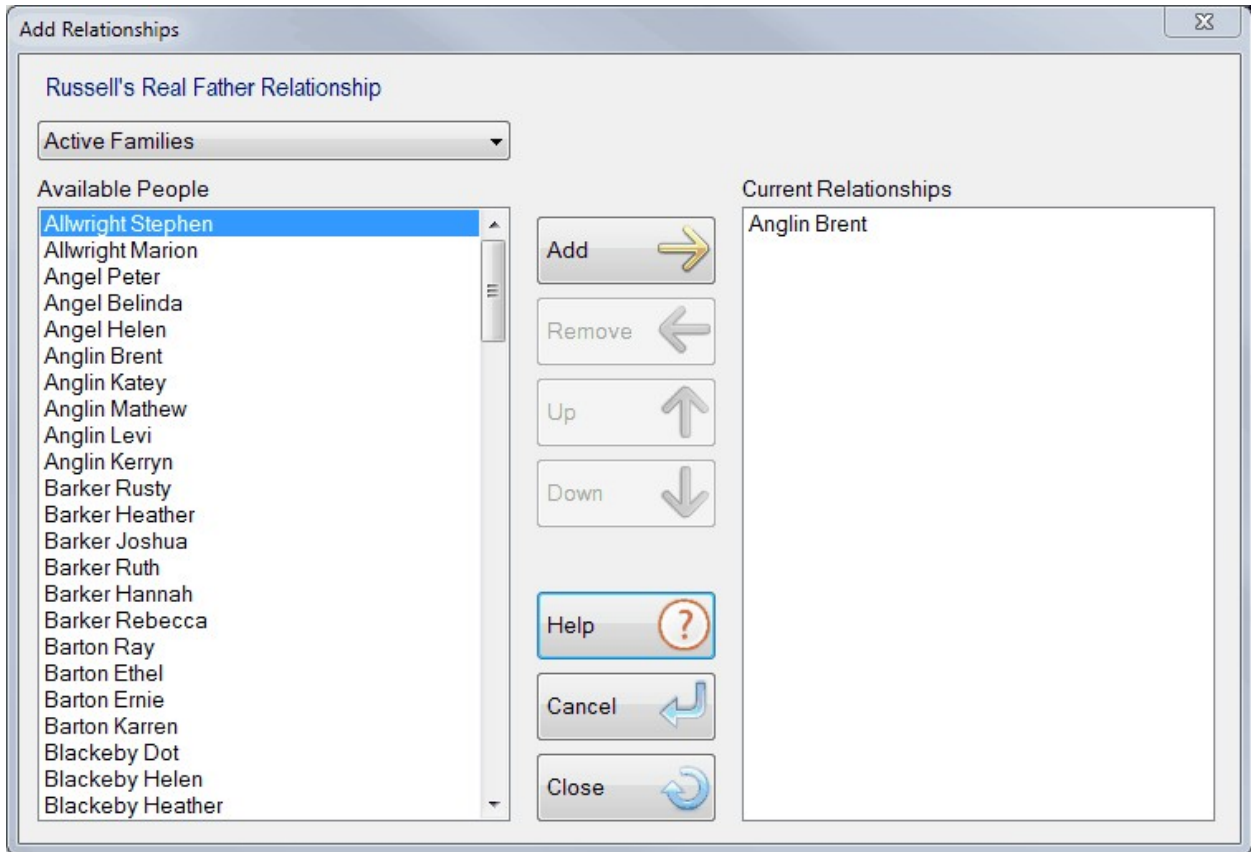
Russell's Relationship...

<p>Available Relationships...</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 150px;"> <p>Real Father</p> </div>	<p>Add →</p> <p>Remove ←</p> <p>Up ↑</p> <p>Down ↓</p>	<p>Current Relationship...</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 150px;"> <p>Real Father</p> </div> <p style="text-align: center;">Add / Delete Relationship </p> <p>Relationship To...</p> <div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>
<p>File Jump </p>	<p>Members </p>	

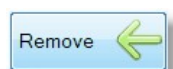
Add Relationship Link

This is the screen that you use to actually create the Relationship Link to another person. Simply select the person in the Left hand list, and in our case double clicking on Brent Anglin has added Brent as Russell's Real Father.

See also [Setup - Family File](#) for more information on defining family file attributes.



Select a Person from the left hand list, and press Add to add that person as the selected relationship.



Press the Remove button to remove a selected Person from that relationship.



Use the Up and Down buttons to change the list order for the selected Related Person.

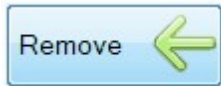
Available Relationships

This is the list of Available relationships that you have setup in the [Setup - Family File](#) area of Pastoral Care.

Control Buttons



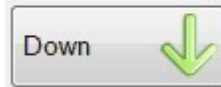
Press Add to add the selected relationship to the current individual in the family file.



Press Remove to remove the selected relationship from the current individual in the family file.



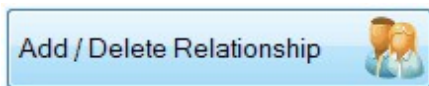
Use the Up and Down arrow control buttons to sort the list of relationships.



[See File Jump](#) for details on this button



[See Members](#) for details on this button



[See Add Relationship Link](#) for details on this button.

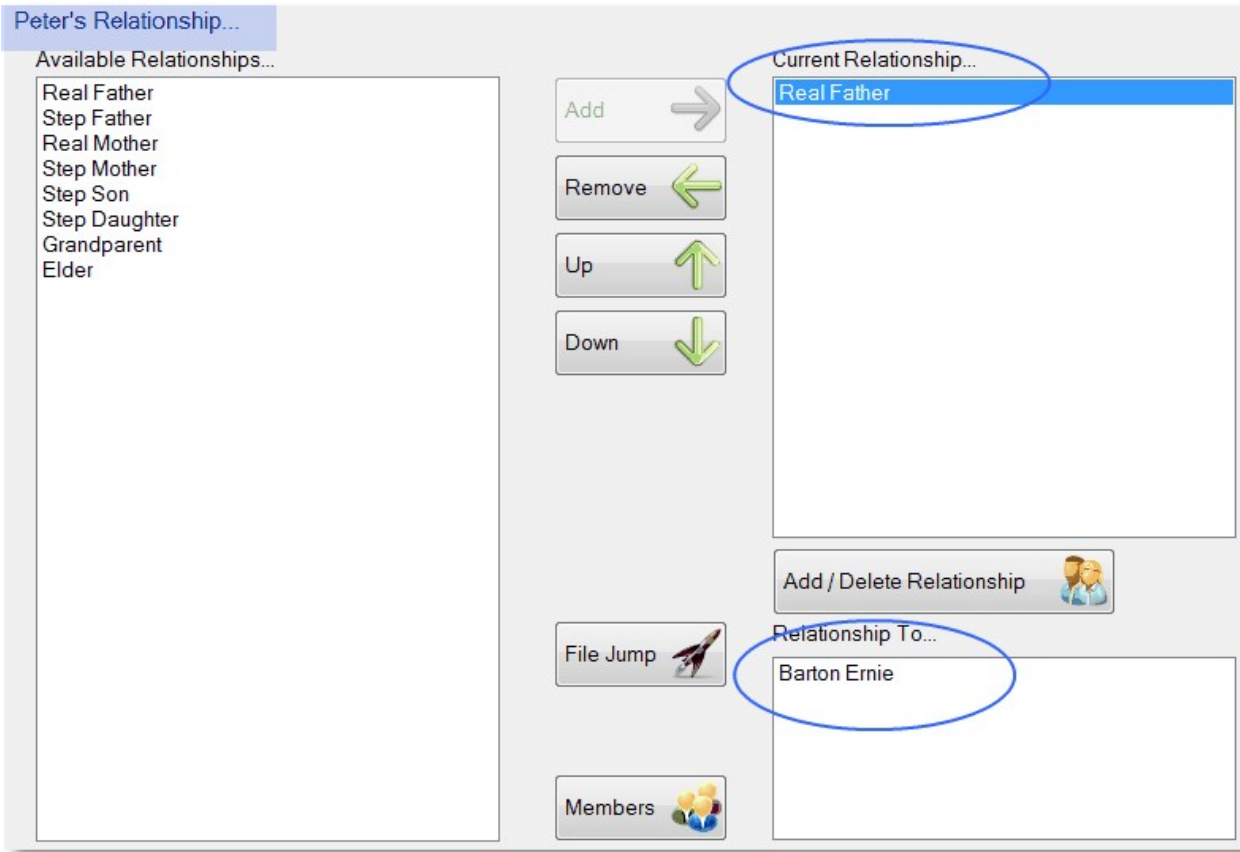
Current Relationship

This shows any relationships currently defined for the selected individual in the family file.

Relationship To

This shows the Individual that is related TO the currently selected person in the family file by way of the selected relationship.

In the example below, Ernie Barton is Peter's Real Father.



File Jump

Press the File Jump Button to load the family file (jump to the file) for the person selected in the Relationship To window.

Members

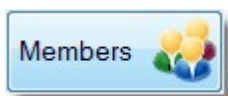
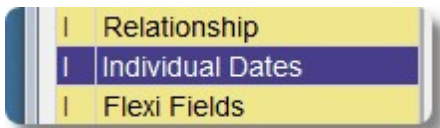
Press Members to see a list of current members of the selected relationship group.

Individual Dates

To add an individual date to the selected family member, double click on that date to add. You can see the example below, we have Russell as a Member, and that information has both a Date and a Tag. The Tag means that this attribute is locatable in a report using a filter. The Date adds the information that allows us to know when a person become a member, and for how long they have been members.

See also [Setup - Family File](#) for more information on defining family file attributes.

This is accessed by selecting Individual Dates from the [Family File Data Areas](#) menu.





Press the Members button to see a list of all people who are members of the selected / highlighted individual group.


Russell's Individual Dates...

Available Individual Dates...

Membership
Baptised
Confirmation
Christened

Add 

Members 

Delete 

Current Individual Dates... Click on the 'Date' cell for edit mode

Individual Date	Tag	Date
Membership	<input checked="" type="checkbox"/>	15/09/2013

Editing Individual Dates

Simply Tick a Tag to indicate that a person has a date for the selected Individual Date, or click in the date area alongside the tag to enter a specific date if known. For example, if you know a person is a member of your church, but you do not have the date information, you can simply tick them as participating in that group without having the date information entered.

Removing a Date

Select the individual date to remove, and press the Delete button next to the Current Individual Dates list.

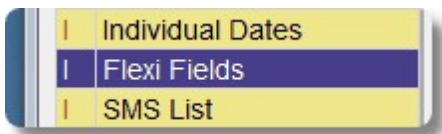
Flexi Fields

Shown below is the Flexi Field data entry area on the family file. This is where you assign one or more flexi fields to an individual.

See also [Setup - Family File](#) for more information on defining family file attributes.

A Flexi field is a field name that you have defined in the [Setup - Family File](#) area. You can save a Predefined Item to a selected flexi field, or you can type in your own Flexi Description, or you can Tag a person as participating in that flexi group.

This is accessed by selecting Flexi Fields Groups from the [Family File Data Areas](#) menu.



The example below shows that Russell has an assigned Elder called John Graham, and a Blood Type of A Negative.

Russell's Flexi Fields...

Available Flexi Fields...

Blood
Elder

Flexi Field	Tag	Flexi Description	Predefined Fields
Elder	<input type="checkbox"/>	John Graham	John Graham Kerry Peters Lance Feldman
Blood	<input type="checkbox"/>	A-	

Click on the 'Flexi Description' cell for edit mode

Adding a Flexi Field

Simply select a person in the family File, choose Flexi Field from the Data Areas list, and double click on an item in the Available Flexi Fields list.

Adding a Predefined Item to a Flexi field

To add an already setup field item, such as an elders name in the above example, select the field in the Current Flexi Fields list, and double click on the Predefined Field item to add that description.

Adding your own free form information to a Flexi field

To add a free hand Flexi description, such as the Blood Group in the above example, select the field in the Current Flexi Fields list, and type in the that description that you want in the Flexi Description box..

Removing / Editing Flexi Field Information

Simply select the Flexi Field in the Current flexi fields list, and click in either the Tag field to tick / untick the tag, and click in the Flexi Description field to edit that information as well.

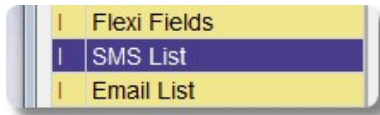
Pressing the Delete Button will remove that flexi field from a person entirely.

Flexi Field Members



Press the Members button to see a list of all people who are members of the selected / highlighted Flexi Field group.

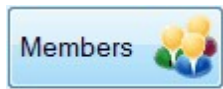
SMS List



An individual person in the family file can be a member of an SMS distribution list. Simply Double click on an item in the Available Lists box to add that to the current person, or double click an item in the Current SMS list box to remove a person from that distribution list.

See Also the [SMS Manager](#) for more information on using SMS messaging in Pastoral Care.

This is accessed by selecting SMS List from the [Family File Data Areas](#) menu.



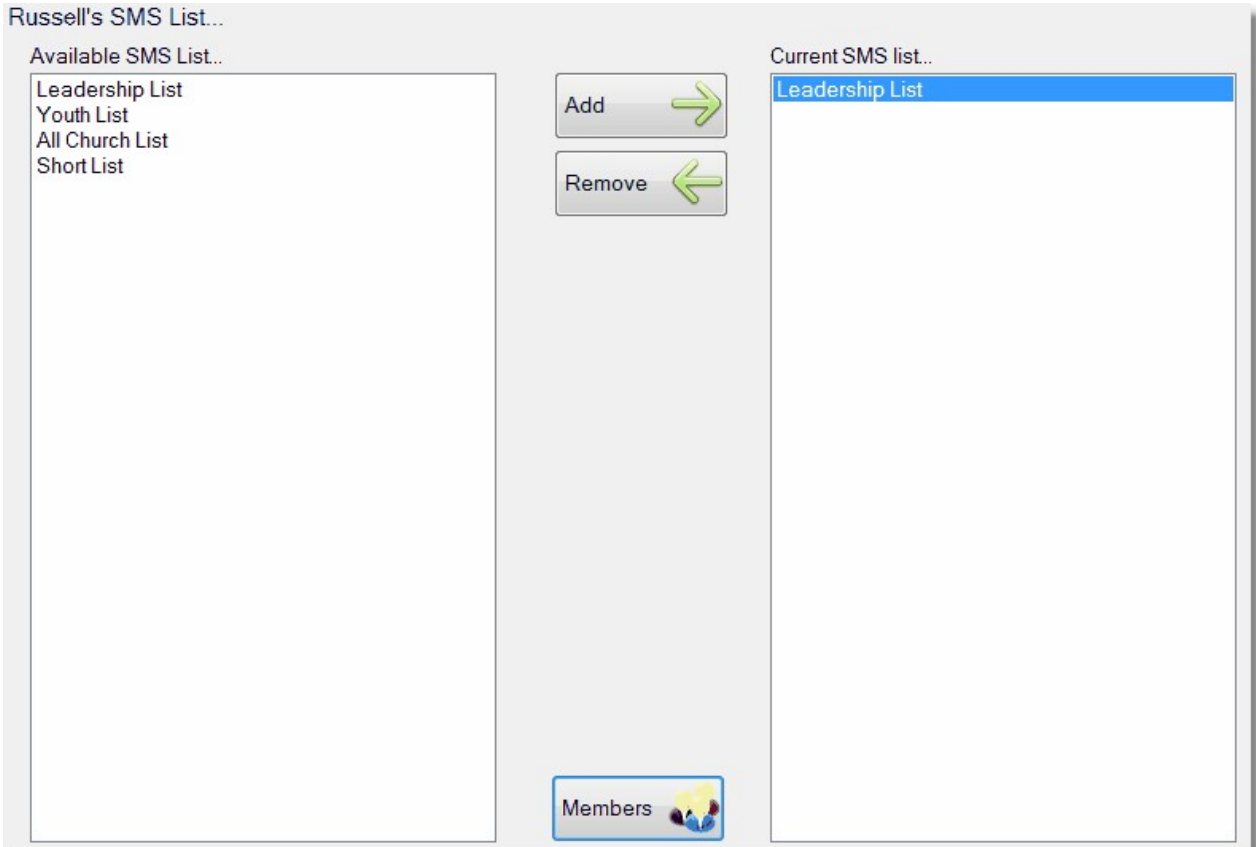
Press the Members button to see a list of all people who are members of the selected / highlighted SMS Distribution List.

Add a person to an SMS list

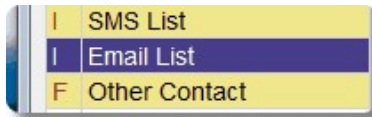
Double click on a list in the Available SMS List area to add them to the Current SMS List for the selected individual

Remove a person from an SMS list

Double click on a list in the Current SMS List area to remove an individual from that SMS List.



Email List



An individual person in the family file can be a member of an Email distribution list. Simply Double click on an item in the Available Lists box to add that to the current person, or double click an item in the Current Email list box to remove a person from that distribution list.

See Also the [Email Manager](#) for more information on using Email messaging in Pastoral Care.

This is accessed by selecting Email List from the [Family File Data Areas](#) menu.



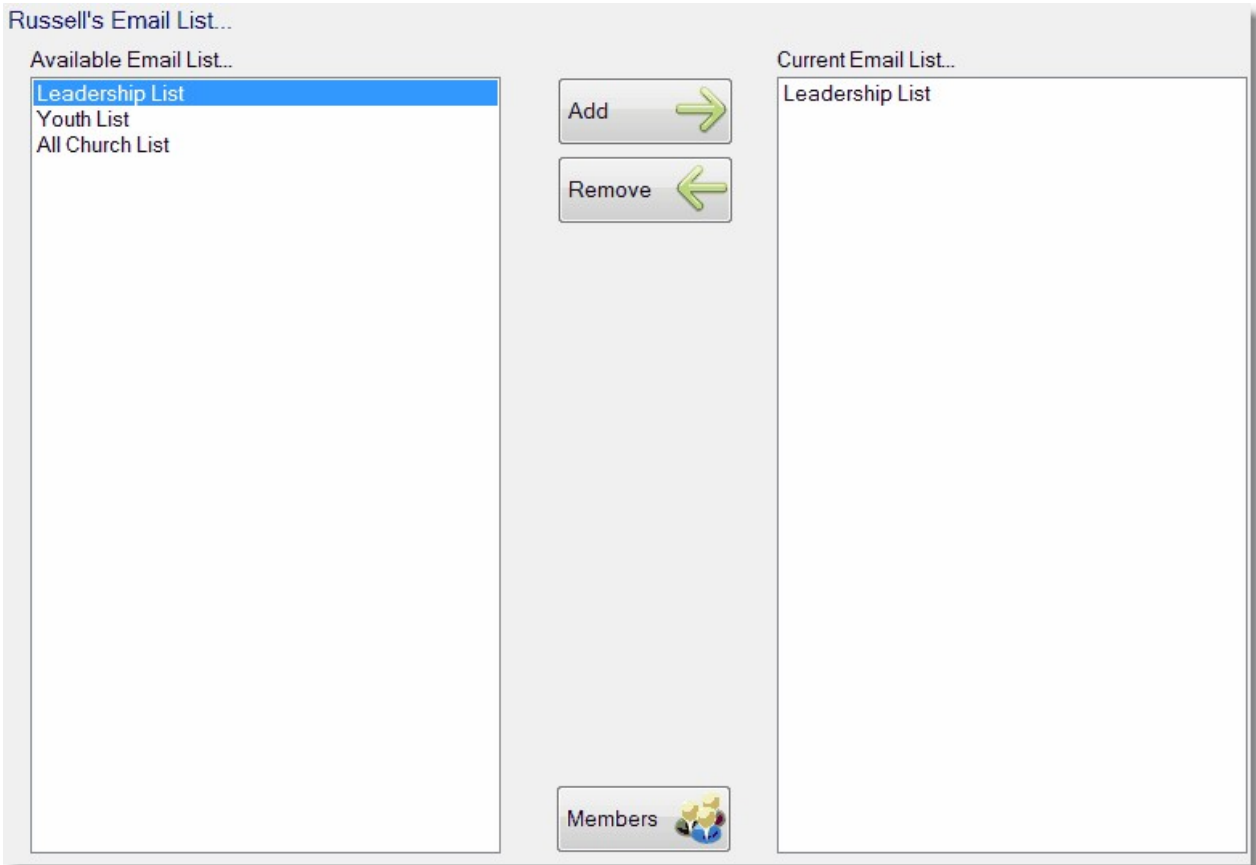
Press the Members button to see a list of all people who are members of the selected / highlighted Email Distribution List.

Add a person to an Email list

Double click on a list in the Available Email List area to add them to the Current Email List for the selected individual

Remove a person from an Email list

Double click on a list in the Current Email List area to remove an individual from that Email List



Other Contact



The Other Contact area in Pastoral Care is a Family item, in that it applies to the whole family.

This is accessed by selecting Other Contact from the [Family File Data Areas](#) menu.

Some ideas for using this field could be: Emergency Contact (Neighbor etc), Holiday House phone number, Work colleague, or friend not in the Pastoral Care Database



Press the New button to add a new "Other Contact" method



Use the Up and Down arrow buttons to move items in the Other Contact List.



Use the Delete Button to remove an item from the Other Contact list.

Other Contact...

New Up Down Delete

Other Contact... Click on a cell to add/edit information

Contact Method	Phone
Russells Mate John Peters	0400-123456
Russells Next Door Neighbor Jack	03 555-5555

Family Group



A Family Group is a group that the entire family belongs to or participates in. Some examples could be First Contact Group, a Language Group or a congregational grouping.

See also [Setup - Family File](#) for more information.

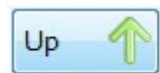
This is accessed by selecting Family Groups from the [Family File Data Areas](#) menu.



Select an Individual Group from the list of available groups, and press Add to add that group to the currently selected person. You can also just double click on an item in the left hand list to add that to the Current Group list for the selected person.



Press the Remove button to remove a selected group from a person. You can also double click on an item in the right hand panel to remove the selected group from the currently selected person.

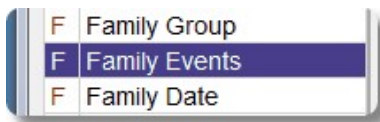


Use the Up and Down arrow buttons to move items in the Family Groups list.

Family Group...

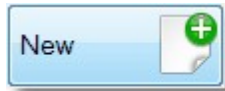
Available Family Groups...		Current Family Groups...
Main Church	Add →	Main Church
Spanish church	Remove ←	
Home Group 1	Up ↑	
Home Group 2	Down ↓	
Home Group 3		
Home Group 4		
	Members	

Family Events



A Family Event is a recorded event that the entire family participated in. Some examples could be First Contact Date, Left Church Date etc.

This is accessed by selecting Family Events from the [Family File Data Areas](#) menu.



Press the New button to add a new Family Event, Simply type in a date if you know the date, and the Description of the Family Event.



Press the Remove button to remove a selected group from a person. You can also double click on an item in the right hand panel to remove the selected group from the currently selected person.



Use the Up and Down arrow buttons to move items in the Family Events List.



Press the Delete button to remove an event from the current family.

Family Events...

New

Up

Down

Delete

Current Family Events... Click on a cell to add/edit information

Date	Family Event
1/05/2013	Joined Church

Family Date



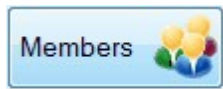
A FamilyDate is a Date that the entire family is involved with.

See also [Setup - Family File](#) for more information on defining family file attributes.

This is accessed by selecting Family Date from the [Family File Data Areas](#) menu.



Select a FamilyDate from the list of available dates, and press Add to add that date to the currently selected family. You can also just double click on an item in the left hand list to add that to the Current Dates list for the selected family.



Press this button to view a list of all Families that participate in the selected date.



Press the Delete button to remove an event from the current family.

Family Date...

Available Family Dates...

Wedding Date
Contact Date

Add

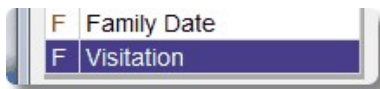
Members

Current Family Dates... Click on the Date cell for edit mode

Family Date	Tag	Date
Wedding Date	<input type="checkbox"/>	1/05/1985

Delete

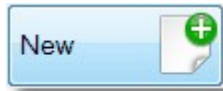
Visitation



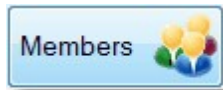
The Visitation area in the family files lets you see short form Pre and Post Visitation Notes, requests for Visit's etc, and also allows you to set an annual target for visiting that family.

See also [Visitation Management](#) for more information on how to use the Visitation Features of Pastoral Care.

This is accessed by selecting Visitation from the [Family File Data Areas](#) menu.



Press the New button to add a new Family Visitation Item, Simply type in a Date for the proposed Visitation to occur on, the person requesting the Visitation, who the Visit is assigned to and any pre or post visitation notes.



Press this button to view a list of all Families that participate in the selected date.



Use the Up and Down buttons to change the list order for the selected Visitation entry.



Press the Delete button to remove a Visitation Entry from the current family.

Visitation...

New Up Down Delete Visitation Target for each year

Click on the Date, Request By or Visitor cell to add/edit information

Date	Requested By...	Visitation Assigned To...	Pre Note	Post Note
06/08/1993		Graham Lawson		Yes

Pre Visitation Note

Post Visitation Note

Marien has requested prayer for her mother

Search For A Family

The Search for a family allows you to find a family, and then either Open their file, or use some of the other standard built in features, such as SMS, Email, Map, or Visitation.



Click on each area of the search window shown below to learn more about this feature.

The screenshot shows the 'Family Search' window. At the top left, there is a dropdown menu for 'Active Families'. The main area contains a list of family names, with 'Allwright S & M' selected. To the right of the list, there are buttons for 'SMS', 'Email', 'Map', 'Visitation', and 'Help'. Below the list, there is a search input field with a 'Search' button and radio buttons for 'Names Only' and 'Names, Addresses, Phone, Emails & Fax'. At the bottom right, there are 'Open File' and 'Close' buttons. The window title is 'Family Search' and it shows 'Family Files Total = 33'.

Family Filter

If you pre-filter the search window with a selected family filter, Pastoral Care will only search through the filtered set of people.

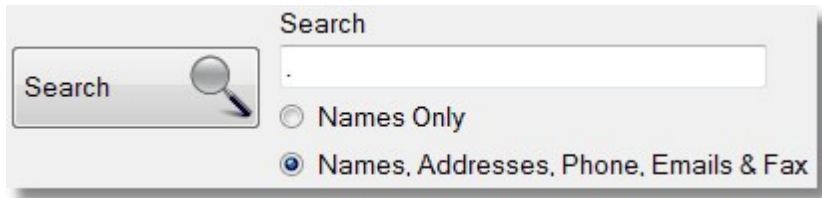


Filters available are all Family Condition filters, Privacy Request filters and all Family Groups.

Search

Performing a Search

1. Select Names Only for faster searching, or select the second option to include more fields to look through
2. Type what you are looking for in the Search Box and press ENTER on your keyboard, or press the Search Button
3. Pastoral Care will highlight the first family it finds, pressing ENTER again will go to the next family it finds using the same search criteria



Visitation Management

Introduction

The Pastoral Care Visitation area has been completely overhauled. From the simple Visit Tag features of previous versions, we have now added more integrated visitation management features that enable you to assign teams to visit selected people, and set target numbers of visit's for each family.

Family Orientated Visitation

Pastoral Care Visitation is still Family Orientated as it was in previous versions, however now with Pre and Post Visitation notes, you can effectively manage who you are visiting as these can be commented in the Pre-Visitation Notes that a visitation team or team member can take with them alerting them of the Address, and who they are visiting and any other relevant information.

Structure

There are essentially 3 different sections to the Visitation Management area of Pastoral Care. Visitation Requests, Team Management and Reports.

Visitation Requests

A [Visitation Request](#) can be set from several places.

- This Visitation Management feature
- The Main Menu - Address Book - Visitation button
- Main Menu - Church Tab - Search for a family
- Family Editor Toolbar - Visitation Button

Team Management

Pastoral Care now lets you create a team, or multiple teams, for visiting people. If you are a small church, and only one person visit's people in your church, just setup 1 team with 1 team member.

Reports

The Reports area allows you to run a number of visitation specific reports, including reports on Families, Teams, Request History and Visitation Analysis reports.



Click on the following areas to learn more about Visitation Management.

[Visitation Management Main Screen](#)

[Visitation Requests](#)

[Team Management](#)

[Reports](#)

Visitation Management Main Screen

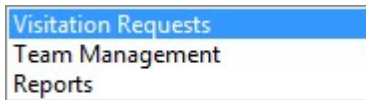


Click on each area of the Visitation Management main screen below to learn more about this feature.

This screen is shown after loading All People in Family Mode (default)

Name	Target	Requests	2012 Visits
Allwright Stephen		1	
Allwright Marion		1	
Angel Peter			
Angel Belinda			
Angel Helen			
Anglin Brent			
Anglin Katey			
Anglin Mathew			
Anglin Levi			
Anglin Kerryn			
Barker Rusty			
Barker Heather			
Barker Rebecca			
Barton Ray			
Barton Ethel			
Barton Ernie			
Barton Karren			
Blackeby Dot			
Blackeby Helen			
Blackeby Heather			
Blackeby Frank			
Brown Peter			
Brown Heather			
Brown Joshua			

Menu Options



The menu options on the Visitation Management main screen give you access to the following 3 areas.

Visitation Requests

Visitation Requests allows you to either view and edit Visitation Requests, or add Visitation Requests to people / families.

See [Visitation Requests](#) for full details.

Team Management

Team Management allows you to create and manage teams of visitors for visiting people in your care. The team can simply be a team of 1 person if you are small church, or teams of many people, the choice is yours.

See [Team Management](#) for full details

Reports

The Reports area of Visitation Management gives you access to tracking and statistical reports assisting you in the further management of Visitation.

See [Reports](#) for full details.

Load

The load button has 2 different functions, depending on the selection of the [Menu Options](#).

Visitation Requests Load

When you press the Load button with Visitation Requests highlighted, the following options are displayed.

Load In All People

Choose this to load in all families that fall inside your [Filters](#)

Load in all those with a Visitation Request

Load in all people that fall inside your [Filters](#) that have a Visitation Request that is outstanding

Load in all those without a Visitation Request

Load in all people that fall inside your [Filters](#) that have NO Visitation Request. This assists you in targeting people that have not been identified for a visit.

Filter families Under Target for completed visit's in the year xxxx


Tick this option to load in families that have not reached their Visitation Target for the entered (current) calendar year.

Team Management Load


If you press the load button with Team Management selected in the menu, Pastoral Care loads a screen that assists you in managing and organising your Visitation Teams. See Also [Team Management](#) for full details.




Filters

The standard set of Pastoral Care Filters allows you to limit the people that you load from a selected group or groups of people. See [Filters](#) in the create reports area for full details on this feature. 

Process

In Visitation Management, the Process button is only active when you have selected the [Menu Option](#) of Reports. Pressing Process will run the selected Visitation Management Report. 

Format

The format button in Visitation Management is only available when Reports is selected from the [Menu Options](#). See [Format](#) in the Create Reports area for full details on this feature. 

Loaded People

The list of people in this area shows people you have chosen to load in to view. See [Load](#) for the different family load options.

Family	Target	Requests	2012 Visits
Allwright Stephen & Marion		1	
Angel Peter & Belinda		1	
Anglin Brent & Katey			
Baker Joshua & Ruth			
Barton Ray & Ethel			
Blackeby Dot			
Blackeby Helen			
Brown Peter & Heather			
Chapman Adrien & Ruth			

Target

Pastoral Care lets you set a target visitation number for the expected number of Visitations to that family in any given year. This can be set in the family file in the family Visitation Data Area. See [Visitation](#) in the family file. See also [Target](#) for more information on the Target field.

Requests

The Requests Column shows the number of active requests for visitation for the selected family.

XXXX Visit's

In our sample above, 2012 visit's columns shows the number of visit's actually performed in the current calendar year.

Send Email

Tick this option to send a detailed email of all visitation information to the selected team member who has been assigned a visitation task to complete.

Send email upon Create Request

Team Selection

Select a Team to be responsible for completing a visitation request to a family / individual. Note: Tick the Send Email option to email the [Assigned To](#) team member all the details of the visitation request.

Team Send email upon Create Request

Elders
Wellness
Leadership

Assigned To

After selecting a team to visit a person / family, you need to select one of the Team Members to do the visit. The ToDo column shows the current number of outstanding visitations booked to each team member.

ToDo	Name
2	Barton Ethel
0	Blackeby Frank
0	Chapman Ruth
0	Collins Stephen
0	Dimsey Richard

Requested By

The Requested By field is usually the name of the person on your leadership team requesting that a visitation event happen for a family. By default, this will be the name of the person logged into Pastoral Care, but can be overwritten.

Requested by

Requested Date

By Default, this date is automatically recorded as the current date of the request creation. The Requested Date is not intended to record the date that you intend to visit a person, rather it is the date that a request for visitation was recorded in Pastoral Care.

Requested Date

Saturday . 1 September 2012

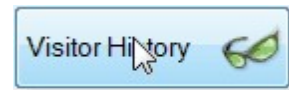
Pre Visitation Note

Enter any notes required to assist the person visiting the family.

Pre visitation note

Visitor History

Press the Visitor History button to see a summary of both Outstanding Visitation Requests, and a history of past visitation carried out by the selected team member. (Note the team members name at the top of the form)



Visitation History

Visits to be completed by 'Barton Ethel'

Current Requests for Visits Total = 2





Date	Requested By...	Family for Visitation...	Pre Note	Email Sent
31/08/2012	john	Angel P & B	Yes	
31/08/2012	Peter	Allwright S & M	Yes	

Pre Visitation Note

Talk to Peter Angel about joining the Mens Visitation Fellowship Group.

History of completed visits Total = 0

Date	Family Visited
------	----------------

Delete

Delete the selected Visitation Request

Re-save Note

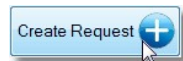
Re-save the Pre-Visitation Note if you have edited that note

Email Request

Re-Email the allocated team member all the details of the selected visitation request.

Create Request

After selecting a team, a team member, a family and filling in the Requested By and Pre-Visitation Note fields, press the Create Request button to save the current entry's as a new Visitation Request Entry.



Visit Complete

Pressing the Visit Complete form will bring up the following form allowing to enter some Post Visitation Notes and to press Complete to complete and save the active visitation as one that is now finished.



Complete

Pressing complete will remove the Visitation Request record from Visitation Management and record all relevant information in the Family File.

Update Family File

This is ticked by default, and this copies the Post Visitation Note to the family file for easy cross referencing.

Pastoral Visitation Complete

Current Requests

Friday, 31 August 2012

Help ? Complete ✓ Close ↻

Update family file with a Visitation Record

Completing a Visitation Request will remove the request record and update the family file with the following visitation information.

Requested by: Peter

Assigned to: Ethel Barton

Date: Friday, 31 August 2012

Pre Visitation Note: Visit Stephen to discuss Eldership

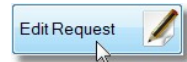
Post Visitation Note:

View Requests

Pressing the View Requests will open the following form showing you all outstanding Visitation Requests for the current family.



Click on the Edit Request button to edit the selected Visitation Request. See [Edit Request](#) for more information on this.



Current Visitation Requests Allwright Stephen & Marion

Date	Requested By...	Visitation Assigned To...	Pre Note	Email Sent
31/08/2012	Peter	Ethel Barton	Yes	No

Pre Visitation Note
Visit Stephen to discuss Eldership

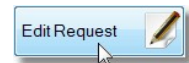
Delete Request

Edit Request

Close

Edit Request

Pressing this button opens up the Edit Visitation Request form. This is shown below.



Target 'Completed' visits for 2012 = 0
'Completed' visits for 2012 = 0

Allwright Stephen & Marion

ReSave Request

Send email upon ReSave

Requested by
Peter

Requested Date
Friday, 31 August 2012

Pre visitation notes

Visit Stephen to discuss Eldership

Visitation team

- Elders
- Wellness
- Leadership

Visitation assigned To

ToDo	Name
2	Barton Ethel
0	Blackeby Frank
0	Chapman Ruth
0	Collins Stephen
0	Dimsey Richard

Help
Close

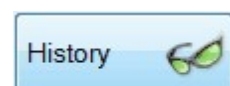
Editing a Visitation Request

You can use this form to edit any aspect of current (not completed) Visitation Request.

Here is a list of the items you can edit on this form:

Select a different team, Select a different team member, Edit the Pre-Visitation Notes, Change the Request By field, Change the Request Date, Choose to send an email on save of the changes. (The email will go to the selected Team Member)

Press the History Button to see information on the previous visit's concluded by the selected team member



View Visits

Press this button to see a summary of previously Completed Visit's for the selected family. The View Visit's form is shown below.



Completed Visits

Completed Visitations for Allwright Stephen & Marion

Click on the Date, Request By or Visitor cell to add/edit information Visitation Records = 1

Date	Requested By...	Visitation Assigned To...	Pre Note	Post Note
6/08/1993		Graham Lawson		Yes

Pre Visitation Note

Post Visitation Note

Marien has requested prayer for her mother

New
Up
Down
Delete
Notes
Save
Close

Editing

You can edit any field in this form except the PreNote column, and Post Note Column, These automatically show Yes or blank depending on the presence of notes in those fields.

To edit a Date, Requested By or Visitation Assigned to field, simply click in those fields to make your change.



Click in a field to edit that field!

Other Functions

Below is a description of each of the buttons on this form and what each of them does.

New

Create a New Visitation Request for this family

Up / Down

Resort items in the list to a different position

Delete

Delete a Visitation Record

Notes

Launch the Family Editor Visitation Notes area

Save

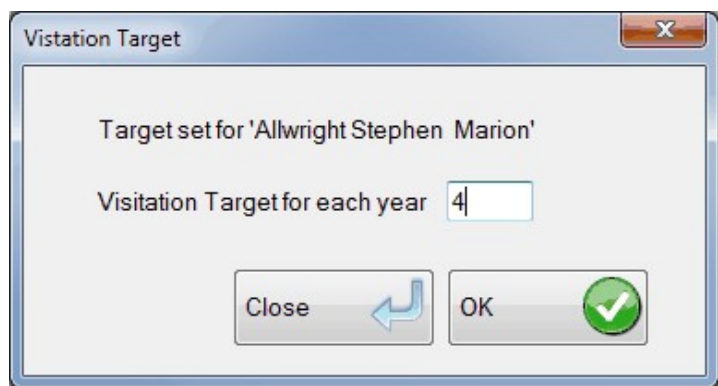
Save any changes made on this form

Close

Close this form an return to Visitation Management

Target

This area lets you set an yearly visitation target for a family. This helps you set goals for visitation, and reporting can be done to show you how you are tracking on those goals.



Visitation Requests

In Pastoral Care, a Visitation Request is usually a Visitation Team created event. It is a decision made by a person who is in leadership or visitation ministry, and they have decided to visit a family or a person. The purpose of the visit might be a simple catch up based on a desire to get around to all members or church attenders within a 12 month period, or the visit may be more purposely planned for a specific reason, or a response to a specific event.

Where to record a Visitation Request

There are several places that you can record a Visitation Request. They are the [Visitation Management](#) area available from the Church Menu on the main screen and the [Address Book](#) area on the main menu.

How to record a Visitation Request

The Visitation Request feature is integrated into the new [Visitation Management](#) features of Pastoral Care. Use this feature to book a visit with a church family.

Schedule a Visit

To schedule a visit to a family using Visitation Management, follow these steps.

1. Select Visitation Management from the Church area on the main window
2. Select any filters you might need to narrow your name search
3. Press Load
4. Select the family to visit
5. Select Visitation Team, and then select a team member to assign the visit to
6. Type in the Requested By field who has requested the Visit
7. Set the date of the request (by default this is the date you are filling in this form), not the date that you want to visit them.
8. Tick the Send Email option if you want to notify the person selected to do the visitation of a booking. The email will contain relevant contact information and visitation history.
9. Press the Create Request Button to schedule a visitation event.

See Also [Setup Visitation](#) for information on setting up the teams in Visitation

See [Visitation Management](#) for more information on Visitation

See also [Visitation Management Main Screen](#) for more details on the use of the Visitation Management area.

Team Management

Pastoral Care uses teams for visiting people. A team does not complete the Visit, however a team is simply used to group a number of Visitation Staff into an organisational unit. Some examples of Visitation Teams could be:

- Elders Team
- Leadership Team
- Wellness Team
- Healing Team
- Prayer Team

See [Setup Visitation](#) for information on how to create your team names.

Adding Team Members

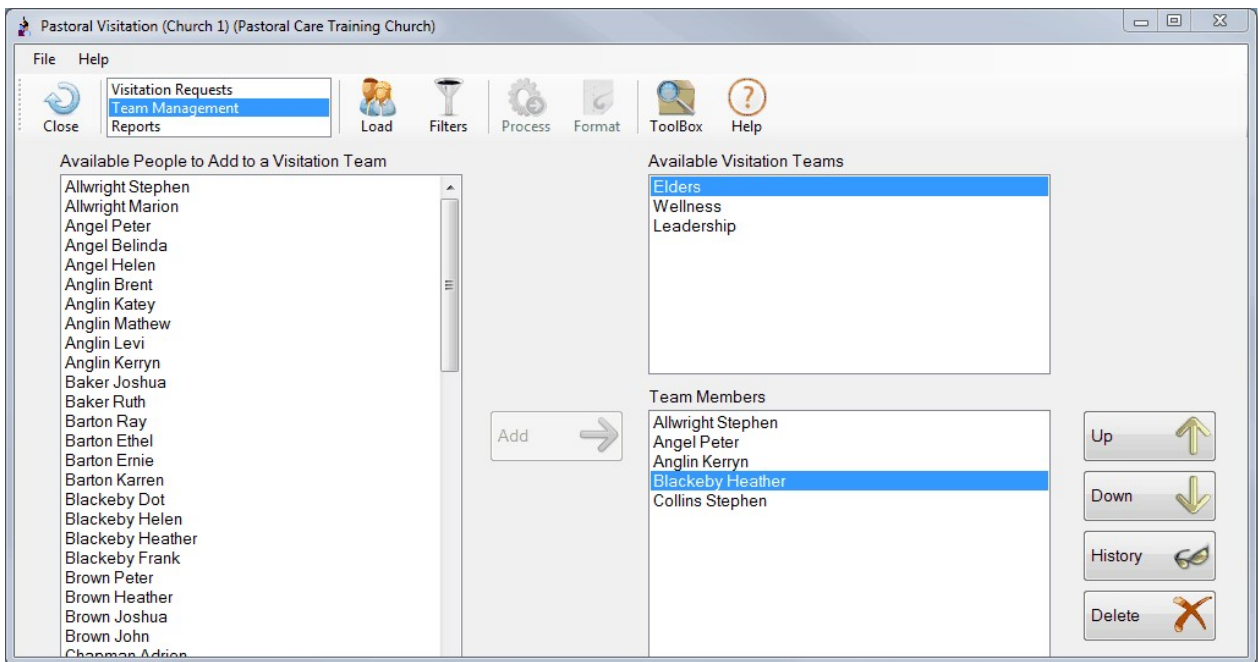
Use the Team Management Area in [Visitation Management](#) to add people to your Visitation Teams. To do this select Team Management from the [Menu Options](#) on the Visitation Management screen, and follow these simple steps.

1. Select any Filters to restrict the names of people you want to select from to a specific ministry or group etc,
2. Press Load to load people into the Available People List
3. Select one of the available Team Names
4. Double click on a name in the Available People list to push them across to the Team members list. (Or select them and press Add)

Shown below is the Team Management window with some people loaded and showing all team members for the Elders Visitation Team



Click on each area of this screen to learn more.



Load

Press the Load Button to load all (filtered) people into the [Available People](#) list.



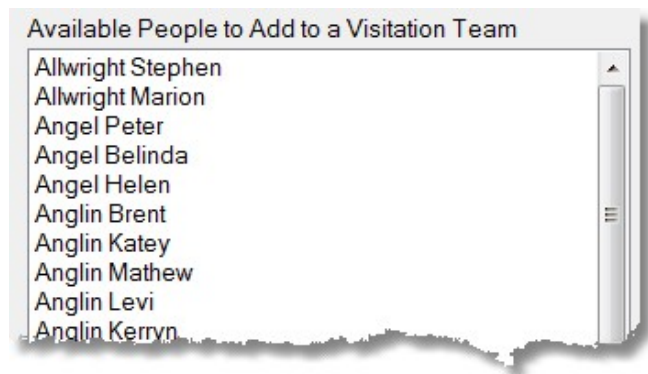
Filters

Use the Filters button to load in selected groups, ministries etc into the Available People list. See reporting [Filters](#) for full information on using filters in Pastoral Care.



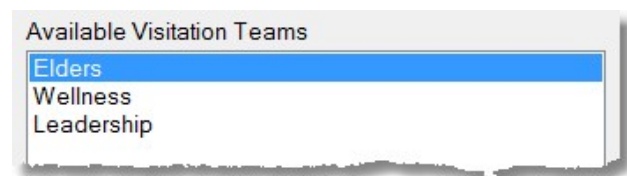
Available People

The list of available people is a list of people you have Loaded using the Load Button, it may be all people (default) or a selected group of people based on [Filters](#) you have used.



Available Teams

Select an Available Team to add people to, or remove people from. See [Setup Visitation](#) for information on setting up Team Names.



Team Members

This is the list of Visitation Team Members for the selected team.



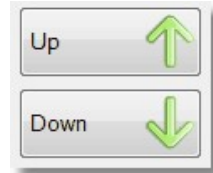
Add

Press this button to add the selected person to the selected Visitation Team.



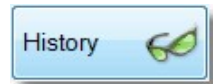
Sort

Use the up and down buttons to change the order of Team Members in the list.



History

Press this to view a Visitation History on the currently selected Visitation Team Member.



Delete

Delete a Visitation Team Member. This will also delete all Visitation History for that team member.



Reports

Visitation Reports enable you to keep a track of Visitation Statistics (How many people have we visited etc) as well as how well you are keeping up with your target visitation.

Clicking on Reports shows you the following 4 report areas. Each of these report areas contain a number of reports that can be run. Every report here can be controlled also by Pastoral Care Filters. (See [Filters](#) in the [Create Reports](#) area for full details on filtering use)

Pre-Flight report options

Many of the reports that are run here also have what we call pre-flight options. That is, further report specific options such as additional date filters, page breaks and other options. You don't have to go looking for the pre-flight options, they are presented to you just before the report runs!

Visitation Report Areas

Family Reports

These reports focus on the Families that have or have not been visited, including targets for families etc

Team Reports

The Team Reports are simply designed to just give you a number of different formatted lists of people who are on your Visitation Teams

Requests / History Reports

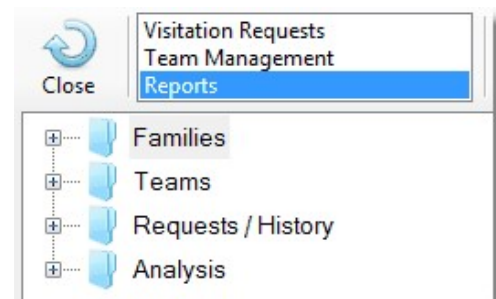
These reports show Requests for Visit's by Team Members, Teams and also grouped by Team Member Surnames. They also show the same report styles for Visitation History as well.

Analysis Reports

Visitation Analysis reports show a number of variations all pointing to how well you are keeping up with your visitations!

Visitation Report Selection

Click on each area of the screen (right) to find out more about the various reports and each of their pre-flight options. Also included in this area are report samples.



Families

Shown below are all the Visitation Management Reports for the Families area.



Click on each report for more information on that report, and a sample view of that report.

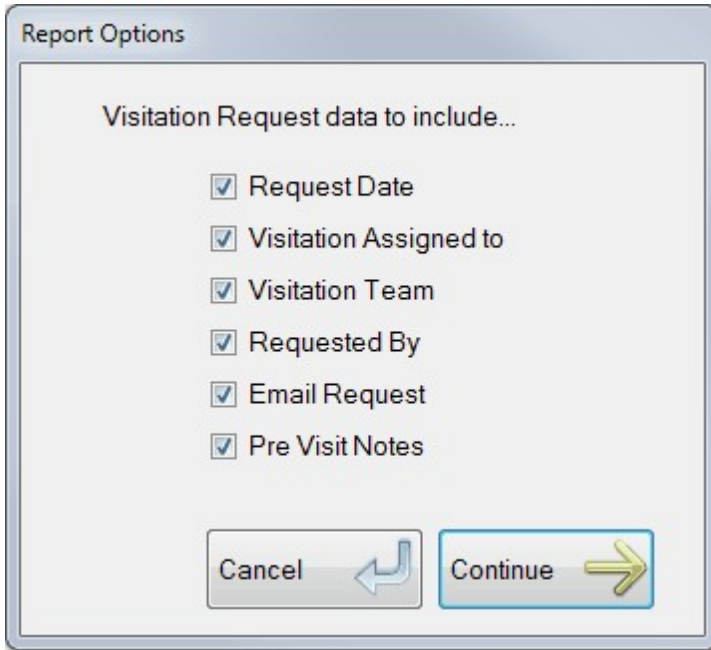


With Visitation Request

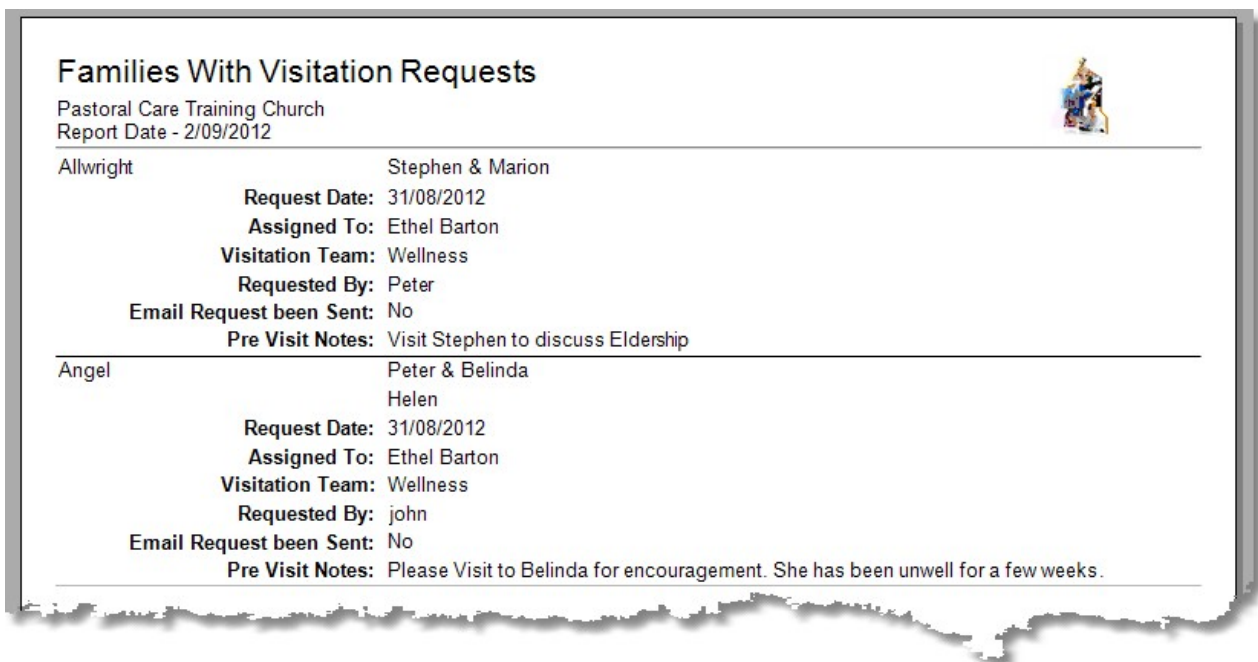
This report shows you families with Visitation Requests that have not been completed, and comes with pre-flight options for selecting fields to include in the report.

Pre-Flight Options

The options for this report are show below. You can select to include any of the fields available for ticking.



Sample Report



Without Visitation Request

This report shows you families without any Visitation Requests and comes with pre-flight options for selecting fields to include in the report.

Pre-Flight Options

There are no pre-flight settings for this report

Sample Report

Families With No Visitation Requests

Pastoral Care Training Church
Report Date - 2/09/2012



Anglin	Brent & Katey Mathew, Levi, Kerryn
Baker	Joshua & Ruth
Barton	Ray & Ethel Ernie, Karren
Blackeby	Dot
Blackeby	Helen Heather, Frank
Brown	Peter & Heather Joshua, John
Chapman	Adrien & Ruth Hannah
Collins	Fred & Jill Stephen
Dimsey	Richard & Lorraine Sarah, Karren, Dodie, Mandy
Dobber	Hugo & Ruby

Under Target

This report shows you families with Visitation Requests that have not been completed, and comes with pre-flight options for selecting fields to include in the report.

Pre-Flight Options

The options for this report are show below. You can enter the year that you want to check the target information in, and choose to show Requests & Completed Visitations VS Targets, or just Completed Vs Target.

Report Option

Target Year

(Requests + Completed Visitations) Vs Target

Completed Visitations Vs Target

Sample Report

The Sample report shows Requests + Completed Visitations VS Targets

Under Target Report

Pastoral Care Training Church
Report Date - 2/09/2012



Allwright	Stephen & Marion Target: 4	Requests: 1	2012 Visits Completed: 0
Angel	Peter & Belinda Helen Target: 4	Requests: 1	2012 Visits Completed: 0

Visitation Completed

This report shows you families with Visitation Requests that have not been completed, and comes with pre-flight options for selecting fields to include in the report.

Pre-Flight Options

The options for this report are show below.

Order Date By

Choose to order the report on dates as entered, or Ascending or Descending

Include...

Choose to include Pre and Post Visitation Notes

Activate Date Filtering

Tick this and set a date range to filter on Visitation Completed Dates.

Sample Report

Family Visitation Report

Pastoral Care Training Church
Report Date - 2/09/2012



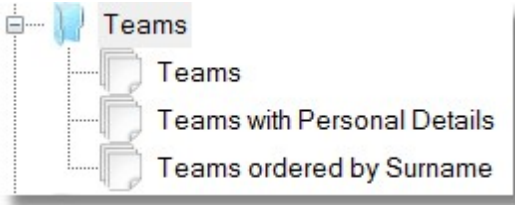
Allwright	Stephen & Marion		
	Date	Requested By...	Assigned To...
	6/08/1993		Graham Lawson
Anglin	Brent & Katey		
	Mathew, Levi, Kerryn		
	Date	Requested By...	Assigned To...
	2/09/2012	John	Ethel Barton
Dimsey	Richard & Lorraine		
	Sarah, Karren, Dodie, Mandy		
	Date	Requested By...	Assigned To...
	12/07/1994		Graham McMahan
	22/07/1994		Graham McMahan
Dobber	Hugo & Ruby		
	Date	Requested By...	Assigned To...
			Pete

Teams

Shown below are all the Visitation Management Reports for the Teams area.



Click on each report for more information on that report, and a sample view of that report.

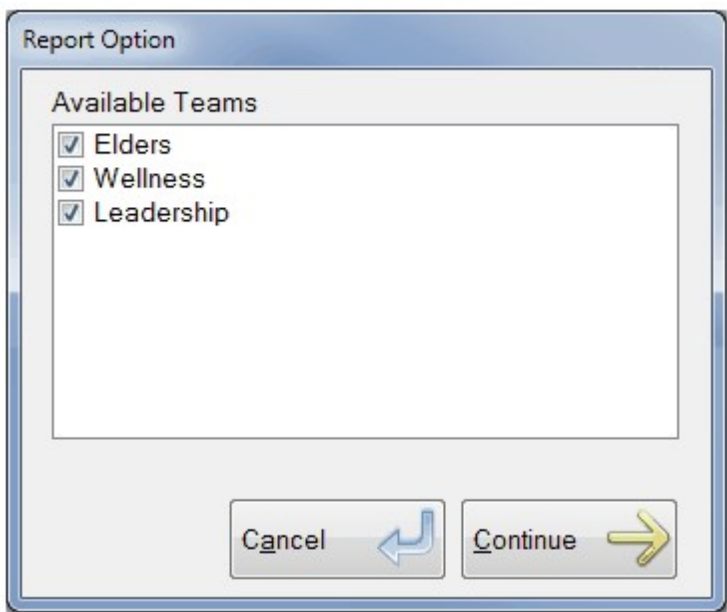


Teams

This report simply lists the names of people on the selected visitation teams.

Pre-Flight Options

The options for this report are shown below. You can select to include any combination of Visitation Teams on your report simply by ticking the teams that you want on the report.



Sample Report

Visitation Team Members



Elders	Stephen Allwright, Peter Angel, Kerryn Anglin, Heather Blackeby, Stephen Collins,
Wellness	Ethel Barton, Frank Blackeby, Ruth Chapman, Stephen Collins, Richard Dimsey,
Leadership	Stephen Allwright, Marion Allwright, Levi Anglin, Mathew Anglin, Brent Anglin,

Teams with Personal Details

This report lists all team members from the selected visitation teams (See Pre-Flight Options below) and includes personal information on each of the team members.

Pre-Flight Options

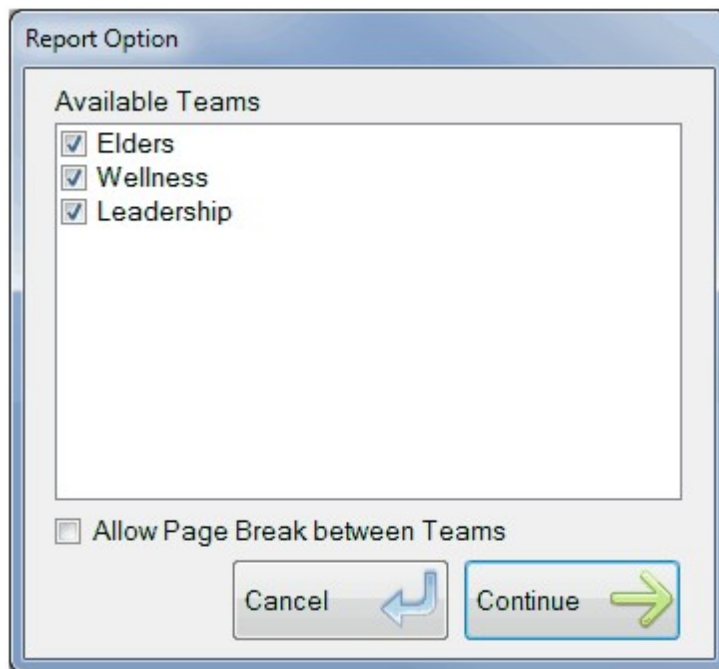
The options for this report are shown below.

Team Selection

You can select to include any combination of Visitation Teams on your report simply by ticking the teams that you want on the report.

Page Break

Choose this option to force a page break between each Team list.



Sample Report

Teams with Personal Information



Elders

Name	Address	Phone	Mobile	Email	Birth
Stephen Allwright	11 Blackdog Road Riddells Creek 3412 VIC	054-33-5478	(P)041234567890	(P)stephen@spirit.com.au	3/07/1945
Peter Angel	12 Water Way Crt Gisborne 3444 VIC	054-22-1199	(P)041234567890	(F)peter@spirit.com.au	2/06/1965
Keryn Anglin	10 Marsh Road Keilor Heights 3191 VIC	03-273214	(F)041234567890	(F)Brentl@spirit.com.au	4/06/2000
Heather Blackeby	55 Prince St Riddells Creek 3412 VIC	054-444-8754	(F)041234567890	(F)ernie@spirit.com.au	4/05/1995
Stephen Collins	12 Ferrier St Sunbury 3099 VIC		(F)041234567890	(F)jill@spirit.com.au	1/02/1990

Wellness

Name	Address	Phone	Mobile	Email	Birth
Ethel Barton	8 King St Sunbury 3099 VIC	03-744-1222	(F)041234567890	(F)ray@spirit.com.au	4/07/1967
Frank Blackeby	55 Prince St Riddells Creek 3412 VIC	054-444-8754	(F)041234567890	(F)ernie@spirit.com.au	3/04/1990
Ruth Chapman	53 Finch St Keilor Heights 3191 VIC	03754-2264	(F)041234567890	(F)adrien@spirit.com.au	4/06/1949
Stephen Collins	12 Ferrier St Sunbury 3099 VIC		(F)041234567890	(F)jill@spirit.com.au	1/02/1990
Richard Dimsey	7 Woods St Melton 3091 VIC	03-712-1478	(F)041234567890	(F)richardl@spirit.com.au	4/06/1959

Leadership

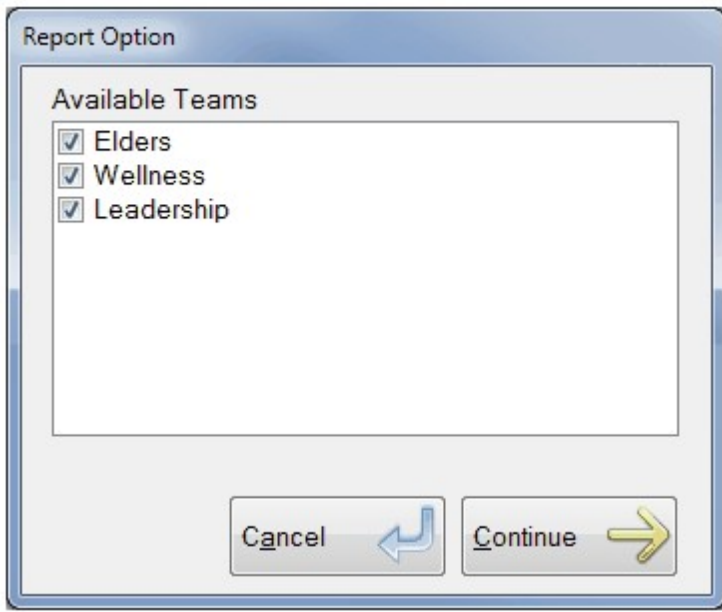
Name	Address	Phone	Mobile	Email	Birth
Stephen Allwright	11 Blackdog Road Riddells Creek 3412 VIC	054-33-5478	(P)041234567890	(P)stephen@spirit.com.au	3/07/1945
Marion Allwright	11 Blackdog Road Riddells Creek 3412 VIC	054-33-5478	(P)041234567890	(B)business_email	5/07/1945
Levi Anglin	10 Marsh Road Keilor Heights 3191 VIC	03-273214	(P)041234567890	(F)Brentl@spirit.com.au	3/08/1985
Mathew Anglin	10 Marsh Road Keilor Heights 3191 VIC	03-273214	(P)041234567890	(F)Brentl@spirit.com.au	12/03/1990
Brent Anglin	10 Marsh Road Keilor Heights 3191 VIC	03-273214	(F)041234567890	(F)Brentl@spirit.com.au	12/07/1956

Teams ordered by Surname

This report simply lists the names of people on the selected visitation teams. The list is grouped by and sorted by Surname.

Pre-Flight Options

The options for this report are shown below. You can select to include any combination of Visitation Teams on your report simply by ticking the teams that you want on the report.



Sample Report

Team Listing by Surname



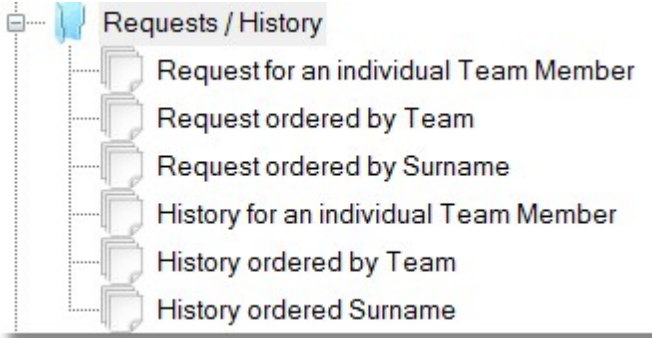
Name		Team Assigned To
Allwright	Stephen	Elders,Leadership
Allwright	Marion	Leadership
Angel	Peter	Elders
Anglin	Brent	Leadership
Anglin	Mathew	Leadership
Anglin	Levi	Leadership
Anglin	Kerryn	Elders
Barton	Ethel	Wellness
Blackeby	Heather	Elders
Blackeby	Frank	Wellness
Chapman	Ruth	Wellness
Collins	Stephen	Elders,Wellness
Dimsey	Richard	Wellness

Requests / History

Shown below are all the Visitation Management Reports for the Requests / History area.



Click on each report for more information on that report, and a sample view of that report.



Requests for an individual Team Member

This report shows you requests for visitation for a single selected Visitation Team Member.

Pre-Flight Options

The options for this report are shown below.

Activate Date Filtering

Tick this option and select the date range to narrow your report search to Visitation Requests within a certain date range.

Selecting a Team Member

Use the Available Teams list, and the Team Members list to select a single team member to report on

Include...

Choose to include selected additional information on the report.

Sample Report

Visitation Request



Barton	Ethel	Date: 31/08/2012	Family to visit: P & B Angel	Email Sent: No
		Requested By: john		
		Pre Visit Notes...		
		Please Visit to Belinda for encouragement. She has been unwell for a few weeks.		
		Date: 31/08/2012	Family to visit: S & M Allwright	Email Sent: No
		Requested By: Peter		
		Pre Visit Notes...		
		Visit Stephen to discuss Eldership		

Request Ordered By Team

This report shows you requests for visitation for selected Visitation Teams. This is a similar report to [Requests for an individual Team Member](#) except that every team member on selected teams is included on the report.

Pre-Flight Options

Activate Date Filtering

Tick this option and select the date range to narrow your report search to Visitation Requests within a certain date range.

Selecting a Team

Tick any of the Available Teams to report on all team members in those teams.

Include...

Choose to include selected additional information on the report.

Page Break

Tick this option to force a page break after each team.

Sample Report

Request by Team



Visitation Team

Wellness	Ethel Barton	Date: 31/08/2012	Family to visit: P & B Angel	Email Sent: No
		Requested By: john		
		Pre Visit Notes...		
		Please Visit to Belinda for encouragement. She has been unwell for a few weeks.		
		Date: 31/08/2012	Family to visit: S & M Allwright	Email Sent: No
		Requested By: Peter		
		Pre Visit Notes...		
		Visit Stephen to discuss Eldership		

Request Ordered By Surname

This report shows you Requests for Visitation grouped by and sorted by Team Member Surnames. There are no Team Selection options, this report will include all Visitation Team members.

Pre-Flight Options

Activate Date Filtering

Tick this option and select the date range to narrow your report search to Visitation Requests within a certain date range.

Include...

Choose to include selected additional information on the report.

Page Break

Tick this option to force a page break after each Team Member.

Report Options

Activate Date Filtering

Tuesday . 4 September 2012

To

Tuesday . 4 September 2012

Include Requested By

Include Pre Visit Note

Include Email Sent

Include page break after each person

Cancel
Continue

Sample Report

Visitation Request by Surname



Barton	Ethel	Date: 31/08/2012 Family to visit: P & B Angel Requested By: john Pre Visit Notes... Please Visit to Belinda for encouragement. She has been unwell for a few weeks.	Email Sent: No
		Date: 31/08/2012 Family to visit: S & M Allwright Requested By: Peter Pre Visit Notes... Visit Stephen to discuss Eldership	Email Sent: No

History for an individual Team Member

This report shows you Completed Visitation History for a single selected Visitation Team Member.

Pre-Flight Options

Activate Date Filtering

Tick this option and select the date range to narrow your report search to Visitation Completed Dates within a certain date range.

Selecting a Team Member

Use the Available Teams list, and the Team Members list to select a single team member to report on

Sample Report

Visitation Completed History



Person Assigned the Visit	Completed Date	Family Visited
Barton Ethel	2/09/2012	B & K Anglin

History Ordered By Team

This report shows you Completed Visitation History for selected Visitation Teams. Note: every team member on selected teams is included on the report.

Pre-Flight Options

The options for this report are shown below.

Activate Date Filtering

Tick this option and select the date range to narrow your report search for Visitation Completed Date within a certain date range.

Selecting a Team

Tick any of the Available Teams to report on all team members in those teams.

Page Break

Tick this option to force a page break after each team.

Sample Report

Visitation Completed History by Team



Visitation Team	Team Member	Completed Date	Family Visited
Wellness	Ethel Barton	2/09/2012	B & K Anglin

History Ordered By Surname

This report shows you Completed Visitation History grouped by and sorted by Team Member Surnames. This report will include all Visitation Team members from the selected teams.

Pre-Flight Options

The options for this report are shown below.

Activate Date Filtering

Tick this option and select the date range to narrow your report search for Visitation Completed Date within a certain date range.

Page Break

Tick this option to force a page break after each Team.

Report Option

Available Teams

- Elders
- Wellness
- Leadership

Activate Date Filtering

Tuesday , 4 September 2012

To

Tuesday , 4 September 2012

Include page break after each team

Cancel
Continue

Sample Report

Visitation Completed History by Team



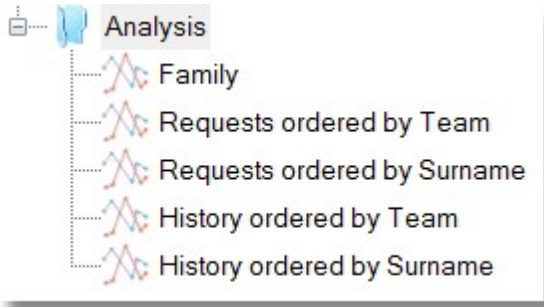
Visitation Team	Team Member	Completed Date	Family Visited
Wellness	Ethel Barton	2/09/2012	B & K Anglin

Analysis

Shown below are all the Visitation Management Reports for the Analysis area.



Click on each report for more information on that report, and a sample view of that report.



Family

This report shows you Visitation Target Figures, Request Figures and Total Visit's for families in your church.

Pre-Flight Options

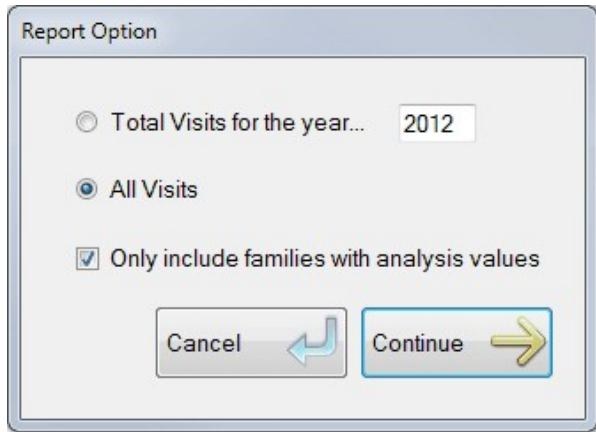
The options for this report are shown below.

Total Visit's for the year....

Enter a year that you want to see Family Visitation Statistics for. Note that a Visitation Year in Pastoral Care is a Calendar Year.

All Visit's

Choose to see all Visitation Statistics regardless of the year.



Sample Report

Family Visitation Analysis



Allwright	Stephen & Marion Target: 4	Requests: 1	Total Visits: 1
Angel	Peter & Belinda Helen Target: 4	Requests: 1	Total Visits: 0
Anglin	Brent & Katey Mathew, Levi, Kerryn Target: 4	Requests: 0	Total Visits: 1
Dimsey	Richard & Lorraine Sarah, Karren, Dodie, Mandy Target: 0	Requests: 0	Total Visits: 2
Dobber	Hugo & Ruby Target: 0	Requests: 0	Total Visits: 1
Edwards	David & Helen		

Requests Ordered By Team

This report shows you the number of Visitation Requests for selected Visitation Teams. Note: every team member on selected teams is included on the report.

Pre-Flight Options

The options for this report are shown below.

Activate Date Filtering

Tick this option and select the date range to narrow your report search to Visitation Requests within a certain date range.

Selecting a Team

Tick any of the Available Teams to report on all team members in those teams.

Page Break

Tick this option to force a page break after each team.

Report Option

Available Teams

- Elders
- Wellness
- Leadership

Activate Date Filtering

Tuesday , 4 September 2012 ▼

To

Tuesday , 4 September 2012 ▼

Include page break after each team

Cancel
Continue

Sample Report

Request Analysis by Team



Visitation Team	Team Member	Requests Total
Wellness	Ethel Barton	2

Requests Ordered By Surname

This report shows you the number of Visitation Requests for selected Visitation Teams, and grouped / ordered by Surnames.

Note: every team member on selected teams is included on the report.

Pre-Flight Options

The options for this report are shown below.

Activate Date Filtering

Tick this option and select the date range to narrow your report search to Visitation Requests within a certain date range.

Selecting a Team

Tick any of the Available Teams to report on all team members in those teams.

Page Break

Tick this option to force a page break after each team.

Report Option

Available Teams

- Elders
- Wellness
- Leadership

Activate Date Filtering

Tuesday , 4 September 2012 ▼

To

Tuesday , 4 September 2012 ▼

Include page break after each team

Cancel
Continue

Sample Report

Request Analysis by Surname



Person Assigned Visitation Request	Total
Barton Ethel	2

History Ordered By Team

This report shows you the number of Completed Visitations for selected Visitation Teams. Note: every team member on selected teams is included on the report.

Pre-Flight Options

The options for this report are shown below.

Activate Date Filtering

Tick this option and select the date range to narrow your report search to Completed Visitation Dates within a certain date range.

Selecting a Team

Tick any of the Available Teams to report on all team members in those teams.

Page Break

Tick this option to force a page break after each team.

Report Option

Available Teams

- Elders
- Wellness
- Leadership

Activate Date Filtering

Tuesday , 4 September 2012 ▼

To

Tuesday , 4 September 2012 ▼

Include page break after each team

Cancel
Continue

Sample Report

History Completed Visit Analysis by Team



Visitation Team	Team Member	Completed Total
Wellness	Ethel Barton	1

History Ordered By Surname

This report shows you the number of Completed Visitations for All Team Members grouped / ordered by Surnames.

Note: every team member on all teams are included on the report.

Pre-Flight Options

The options for this report are shown below.

Activate Date Filtering

Tick this option and select the date range to narrow your report search to Visitation Requests within a certain date range.

Page Break

Tick this option to force a page break after each team.

Report Options

Activate Date Filtering

Tuesday , 4 September 2012 To Tuesday , 4 September 2012

Include page break after each person

Cancel Continue

Sample Report

History Completed Visit Analysis by Surname



Person who Completed the Visitation	Total
Barton Ethel	1

Roll

Introduction

The roll area is where you record attendance or absentee information for predefined roll projects and events. A roll project is for example, your worship services. Each roll project can have up to seven events. So for most churches, setting up a roll project called "Church" should do the trick. If you want to add additional roll projects to record and track attendances at other events, such as home groups, fellowship groups etc, then you could use additional roll projects for each of these.

Pastoral Care can store unlimited roll projects, each one with up to seven events. This allows you to manage the largest of churches, right down to the smallest of churches.

Roll Events Vs Roster Events

There is no link between a Roll Project and Roster Events. An event that you create in the Roll area, does not automatically appear in the Roster area. These are two separate areas that currently are not linked in any way.

Setting up the Roll Area

See [Setup Roll - Finance - Weekly Project](#) area for how to setup the Roll Area.

Using the Roll Area

To start the Roll area, select Roll from the Church Tab on the main menu. The [Roll Area Window](#) is displayed.

Roll Area Window

From the Roll window you can select to [Add / Edit Records](#) or to run Roll [Reports](#).

Click on the different elements of the Roll Window below to learn more about each of these features. Note, the Roll Window below is shown during a Data Entry phase. That is, information is being entered for a roll event.



You can still click on different areas on this graphic to learn about each area of this window.

Please note: Some items shown below are disabled. Not all features are available in all circumstances.

Roll (Church 1) (Pastoral Care Training Church)

File Help

Close Add/Edit Records Reports Load Save Update Process Filters Sort Format Transfer ToolBox Help

Roll Project
 Sunday Services
 Add New Record
 Sunday 2 September 2012
 View / Alter
 Edit Delete

People WITHOUT attendance 108
 Leah Marg
 Leah Nathan
 Leah Leanne
 Lynch Allan
 Lynch Kerry
 Lynch Christopher
 Lynch Adam
 Lynch Mandy
 McCoy Darryl
 McCoy Barbara
 McCoy Kylie
 McCoy David
 Morton Peter
 Morton Judy
 Morton Paula
 Morton Christine
 Nixon Greg
 Nixon Esther
 Oliver Bruce
 Oliver Fran
 Potter Nathan

People WITH attendance 20
 Allwright Stephen
 Angel Peter
 Angel Helen
 Anglin Brent
 Anglin Katey
 Anglin Mathew
 Anglin Levi
 Anglin Kerryn
 Baker Joshua
 Baker Ruth
 Barton Karren
 Blackeby Dot

Notes B Code Keys F1 Mouse

Search

Family Append Records
 Morning am1
 Morning am2
 Evening
 Absent
 Sick
 Holiday
 Other

Visitors are edited by clicking on the Total cell

Visitors	Total
Morning am1	0
Morning am2	0
Evening	0

Roll Area Toolbar

The Roll area toolbar buttons are shown below. These are all shown active, however some of them are only available under varying conditions.



Load

Press the Load Button to load in all people or selected people via the Filters option. These will be people you want to mark off on a Roll.



Sort

This button is only available for selected reports, and is described in the Roll [Reports](#) area.



Save

Press Save to complete a Roll data entry and finalise it. If you accidentally press this, you can still use View/Alter to continue editing a Roll.



Format

This is the standard Pastoral Care Format control. This is available in all reporting areas. Full details can be found at [Format](#)



Update

Press the Update button to Save your Roll data entry and pause working. This leaves the data entry process saved, but able to be continued.



Transfer

The [Transfer](#) Button is only available after a roll has been saved. This allows you to transfer the people noted in the Roll across to the [Weekly Statistics](#) area.



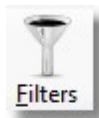
Process

Press Process to display a selected report. This button is only available for Roll [Reports](#).



ToolBox

[See Toolbox](#) for full details on the Toolbox Button



Filters

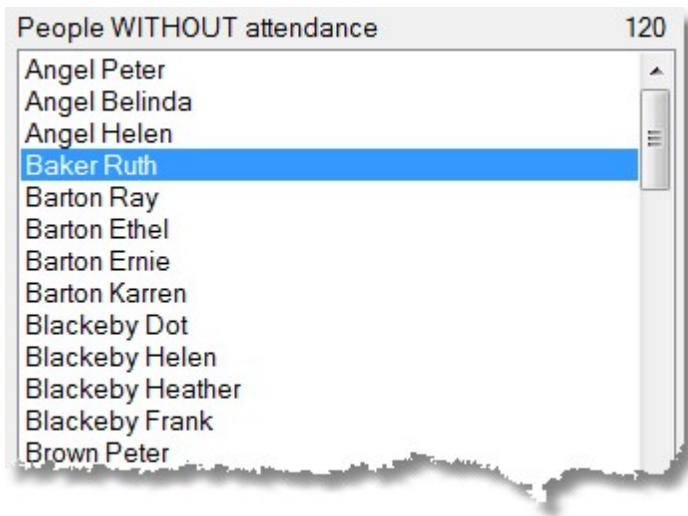
Use Filters to restrict the list of people you are working through for the particular Roll you are entering.



Help

The Help Icon opens Pastoral Care help to get help on the area you are in.

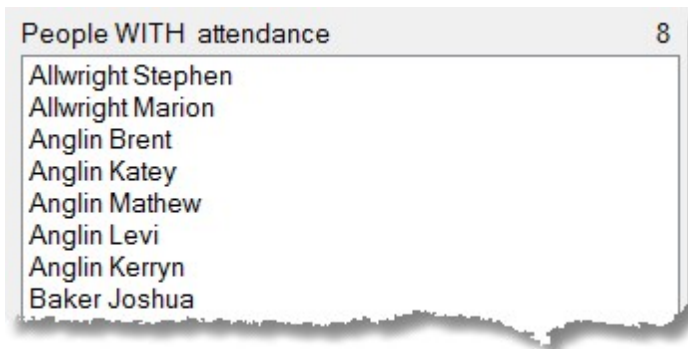
People Without Attendance



This list of people are people you have Loaded into the Roll area, but you have not yet assigned an attendance state to them. These people are still undecided! If you leave people in this list and process the roll, those people will be recorded with a system assigned attendance status of "Unknown".

The Number 120 in the top right corner indicates in our example that there are still 120 people to mark off with an attendance state.

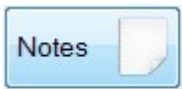
People With Attendance



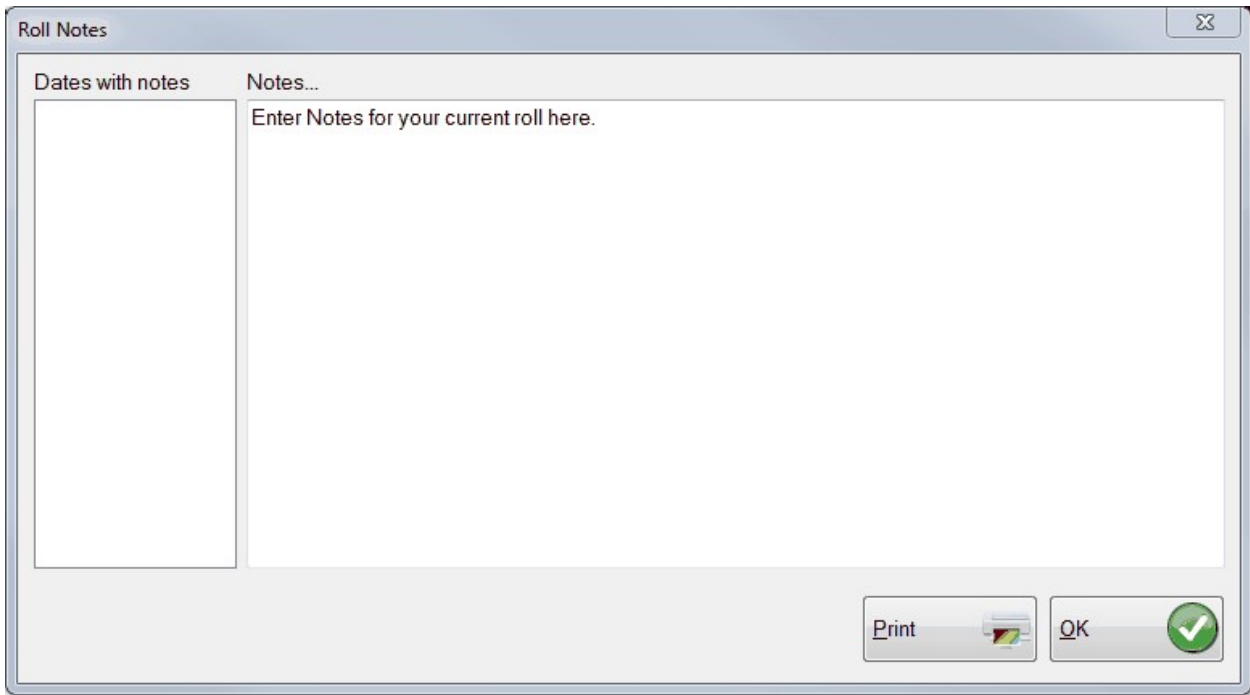
This list of people are people you have Loaded into the Roll area, and you have **assigned** an attendance state to them. These may be people who were at church, **OR** away, the fact that they are in this list means you have accounted for them in this Roll event.

The Number 8 in the top right corner indicates in our example that we have accounted so far for 8 people in this roll event with an attendance state.

Notes



Press the Notes button to allow you to enter notes for the current roll event Data entry.



Bar Code

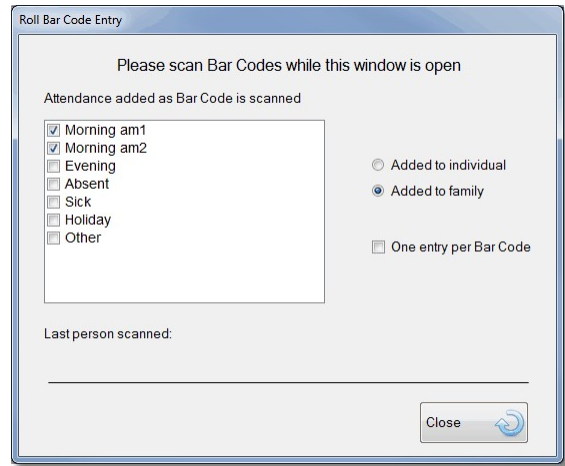


Pressing the Bar Code button opens up the Bar Code entry window. If you are using Bar Code lists for ticking people off against at church, or perhaps using Bar Code Name Tags for children's ministries, then you can use a Bar Code to complete the Data Entry process.

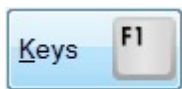
Using the Bar Code Scanner

While this window is open, simply tick the Attendance / Absence codes that you want to mark with each scan, and then scan your bar codes. Each person scanned will be noted in the Last Person Scanned area You can scan / imply an entire family with one family member scan by selecting Added To Family option, or a single one person per scan with Added To Individual option.

Tick the One Entry per Bar Code to increase scanning reliability.



Keys

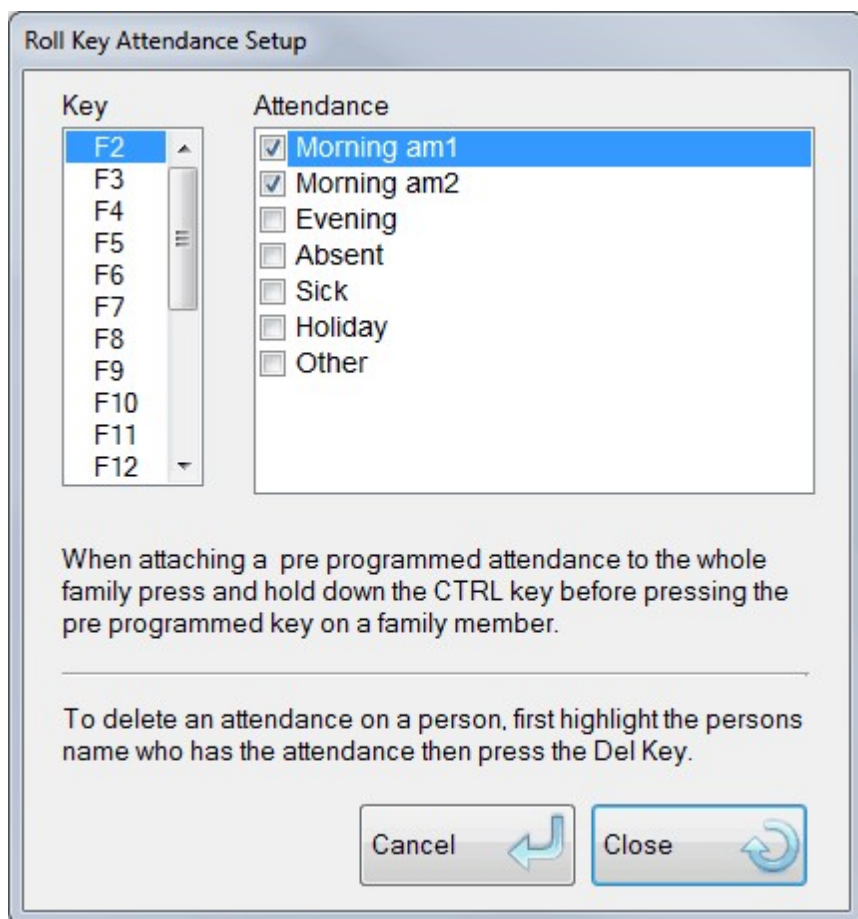


Press the KEYS button to program Function Key shortcuts for different attendance states. In the example below, this setting allows Pastoral Care to set a person to be in attendance for AM1 and AM2 morning services by pressing F2 on their name. If you press CONTROL + F2, then the entire family for the selected person will be marked as attending both AM services in the example below.

See also [Append Records](#) for other features that effect Key data entry.

Deleting an Attendance State

If you have accidentally marked a person with an incorrect attendance state, you can delete that entry by selecting their name in the [People With Attendance](#) list and pressing the Delete key on your keyboard.



Append Records

Append Records

The Append Records option when ticked allows Pastoral Care to ADD roll attendance states to a person instead of replacing them. This feature although selectable in all modes, really only effects the [Keys](#) data entry method, as by Definition, using a Mouse or a Bar Code allows for multiple entries for the one person.

Mouse



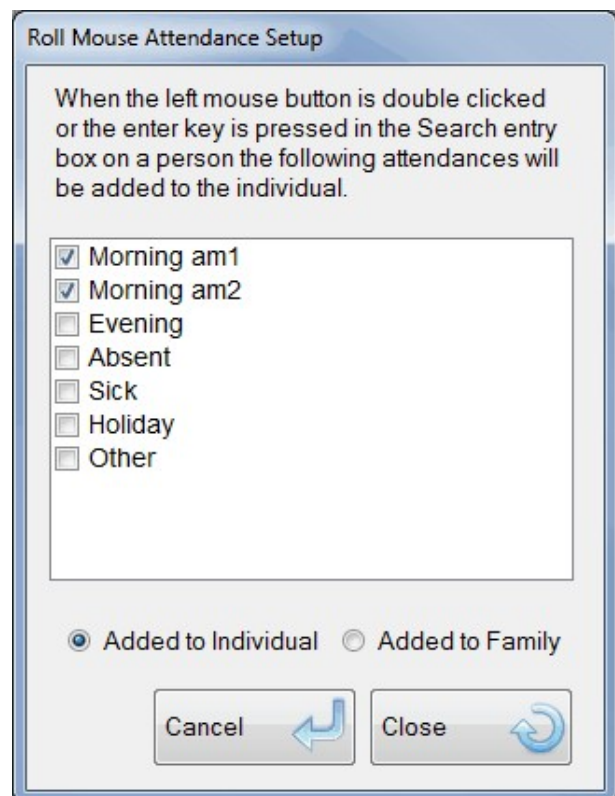
Press the Mouse Button (shown left) to open the Mouse Attendance Setup window. Here you can program default attendance states for a Double Click on a name. You can double click on a name in the [People Without Attendance](#) area or the [People With Attendance](#) area, and either way, that person you double clicked on will be marked with the state(s) selected here.

Add to Individual

This option is selected by default, and this sets Pastoral Care to mark a single person with the selected state(s).

Add to Family

This option sets Pastoral Care to mark the entire family of a single selected family member with the selected state(s).



Search

Search

If you enter part of a person's name in this area, Pastoral Care will highlight the name it finds that matches as you type. If the name you want becomes highlighted, pressing ENTER at the point of having that correct name highlighted will cause Pastoral Care to mark the highlighted person with an attendance state as set up in the [Mouse](#) control area.

Caution, as Pastoral Care does the best match, make sure the correct person is highlighted before you press enter!

Family and Individual Attendance

When a person is selected in either the [People Without Attendance](#) list or the [People With Attendance](#) list, you can select (by simply clicking) an attendance state. For example, select a person from the People Without Attendance list and click on Morning AM1 to add them to that event. Click again on Morning AM2 to add them to that event as well.

Absentee states

Selecting an Absentee state will automatically remove any ticked event states!

Family Attendance

If an entire family is at the Evening service for example, select one person from the [People Without Attendance](#) list and press the Family button next to that event. This also works the same way for an absent reason, such as Holiday!

Family

- Morning am1
- Morning am2
- Evening
- Absent
- Sick
- Holiday
- Other

Visitors

Visitors are edited by clicking on the Total cell

Visitors	Total
Morning am1	0
Morning am2	0
Evening	0

For each of your Roll Events, you can enter the total number of Visitors. Simply click in each of the cells to edit that cell.

Portrait

If a family / person has any portrait information, this will be displayed here. Note if your church does not use Portrait information for families, you can disable the display of portrait information by using the settings in the [General Options](#) area of the Global settings.

Add / Edit Records

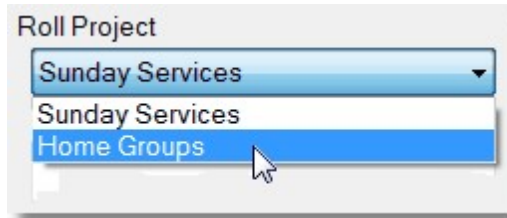
Adding Roll Records

The process of adding a Roll Record involves the following steps.

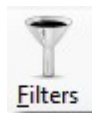
Step Description

- 1 Select the roll project that you want to enter a Roll on. For example, Church Services, Home Groups etc

In our example (right) we are selecting the Home Groups project.



- 2 Use [Filters](#) to restrict the list of people you are working with to just those groups of people you are entering a roll on.



- 3 Choose Add New Record, and then Select a Date for the Roll Event to be recorded on.



- 4 Press the Load Button. This loads in all people in your database if you have not used any [Filters](#) to restrict the load to selected people.



- 5 Select each person in the [People Without Attendance](#) list and use any of the data entry methods to mark each person or family for attendance or absence at the selected Roll Event.

See [Family and Individual Attendance](#) and also the following Data Entry Methods

[Bar Code](#) [Keys](#) [Mouse](#) [Search](#)

- 6 Update the Roll from time to time if you are going to be interrupted during this process.



- 7 Save the Roll when completed



View / Alter

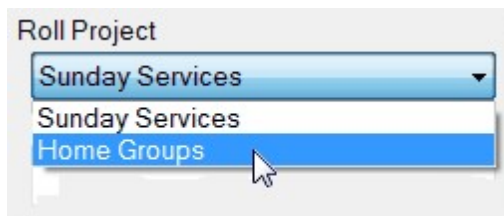
The ability to View or Alter a Roll Record is very Simple. This allows you to later Transfer information to the [Weekly Statistics](#) area, or even update some Roll information after a Roll has been saved.

The Steps to alter a Roll Record are as follows...

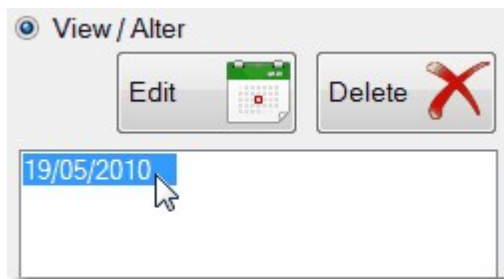
Step **Description**

- 1 Select the roll project that you want to enter a Roll on. For example, Church Services, Home Groups etc

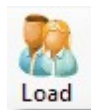
In our example (right) we are selecting the Home Groups project.



- 2 Choose View / Alter and then Select a Date available in the list.



- 3 Press the Load Button on the toolbar to load the selected Roll for editing.



- 4 Make any Changes to the Roll and press the Save button on the Toolbar.



Transfer



As a Roll records Names of people attending a Church event, you can convert this information to Statistics (numbers) by transferring the count of people to the [Weekly Statistics](#) area of Pastoral Care.

Converting your Roll Data to Weekly statistics puts the numbers in concrete so to speak. As people come and go from your church, and perhaps you delete people from your database, this will affect historical roll data, however it won't change the counts stored in Weekly Statistics.

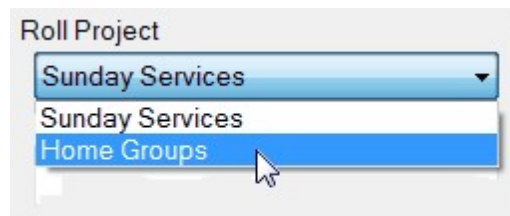
See Setting up Pastoral Care - [Setup Roll - Finance - Weekly Project](#) for information on setting up these related areas.

Transferring Roll Data to Weekly Statistics

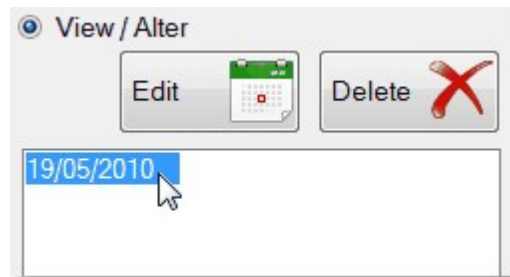
To transfer Roll Data to Weekly Statistics, follow these steps.

- 1 Select the roll project that you want to transfer a Roll from. For example, Church Services, Home Groups etc

In our example (right) we are selecting the Home Groups project.



- 2 Choose View / Alter and then Select a Date available in the list.



- 3 Press the Transfer Button to open the [Transfer Roll Window](#).



Transfer Roll Window



Click on each area of the Transfer Roll Window below to learn more about how this feature functions.

See Also [Transfer](#) for step by step instructions on completing a Roll Transfer to [Weekly Statistics](#).

Transfer Roll Data to a Weekly Project

Available Weekly projects

- Sunday main
- Spanish service
- Outreach

Date to add in Weekly Statistics

Sunday , 30 September 2012

	Attendance	Visitors	Total	Transfer to Weekly Group
Morning am1	43	10	53	AM Attendance
Morning am2	36	20	56	AM Attendance
Evening	57	30	87	Evening Attendance

Help ?
Transfer
Close

Available Weekly Projects

Select an Available Weekly Project to transfer the Roll Data to. See also [Setup Roll - Finance - Weekly Project](#) for information on setting up Weekly Statistics.

- Sunday main
- Spanish service
- Outreach

Attendance Statistics

This area shows you the Roll data converted to numbers ready for transfer to Weekly Statistics.

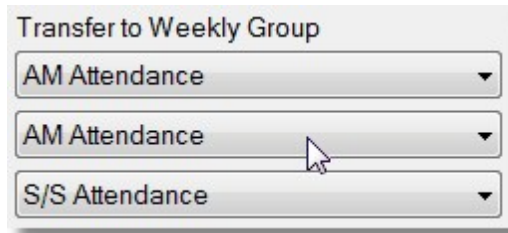
	Attendance	Visitors	Total
Morning am1	43	10	53
Morning am2	36	20	56
Evening	57	30	87

Date to Transfer To

By Default, the date you loaded for transferring is automatically loaded here. You can edit this date if needed.

Destination Group

Select each group that each of the corresponding Statistics will be transferred to.



The screenshot shows a dialog box titled "Transfer to Weekly Group". It contains three vertically stacked dropdown menus. The first dropdown menu has "AM Attendance" selected. The second dropdown menu also has "AM Attendance" selected, and a mouse cursor is hovering over it. The third dropdown menu has "S/S Attendance" selected.

Transfer Button

Press this to Complete the transfer to the [Weekly Statistics](#) area.

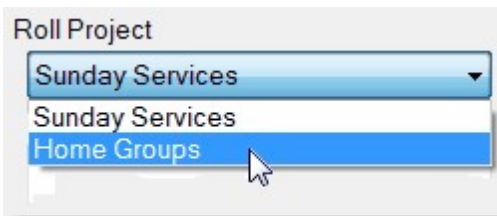
Edit Roll Dates

If you have accidentally saved a Roll against an incorrect date, you can follow this procedure to change that date.

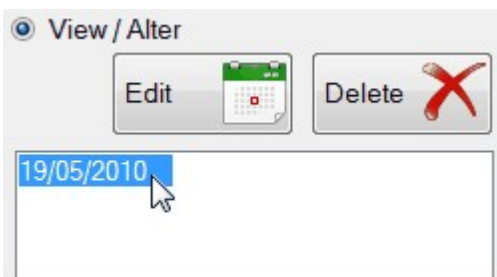
Step Description

- 1 Select the roll project that you want to enter a Roll on. For example, Church Services, Home Groups etc

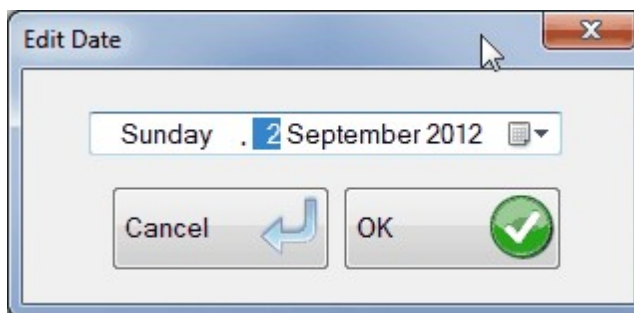
In our example (right) we are selecting the Home Groups project.



- 2 Choose View / Alter and then Select a Date available in the list.



- 3 Press the Edit Button and select a new date for the Roll Record. Pastoral Care will not let you overwrite an existing date.



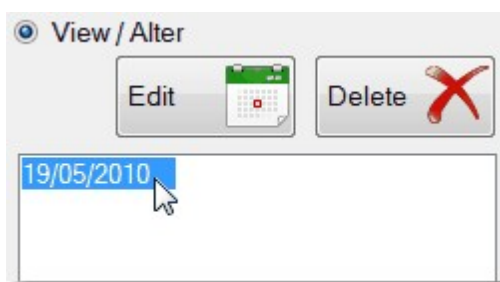
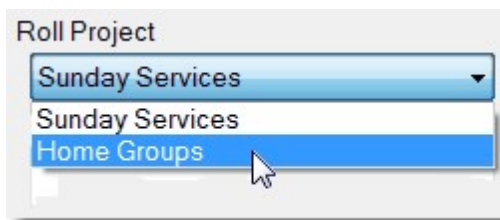
Delete A Roll Record

If you wish to delete a Roll Record, you can follow this procedure. Note: Deleting a Roll Record cannot be undone.

The Steps to alter a Roll Record are as follows...

- | Step | Description |
|------|---|
| 1 | Select the roll project that you want to enter a Roll on. For example, Church Services, Home Groups etc

In our example (right) we are selecting the Home Groups project. |
| 2 | Choose View / Alter and then Select a Date available in the list. |
| 3 | Press the Delete Button (Shown Above) to remove the Roll Data stored against that Roll Project / Date. |



Reports

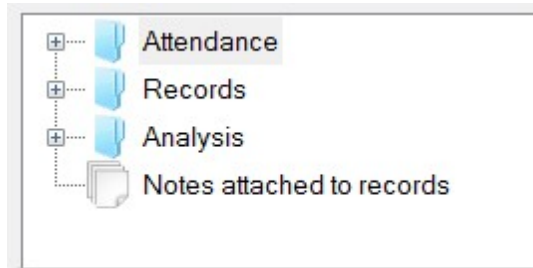
Pastoral Care Roll Reports are designed to inform you about the attendance patterns and absence from events from people in your church. To access the Roll Reports area, select Reports from the Roll area tool bar.



Available Roll Reports



Click on each of the areas (right) to find out about each of the Roll Report Categories, and the available reports in those categories.



Pre-Flight Options

As with many Pastoral Care reports the Roll reports have Pre-Flight options for different report configurations. These allow the addition of further filtering and added information for reports. All Pre-Flight options are explained with each report in this area, and in the program, they are presented to you to answer just before a report is displayed.

Standard Report Features

All of the reports in the Roll Area behave the same way most reports do. They all are sent to the Common Report Output Control window, they are all effected by Report Filters, and can be modified with standard Pastoral Care Report Format Options.

For more information on these Standard Features, see:

[Filters](#)

[Pastoral Care Reports Master List](#)

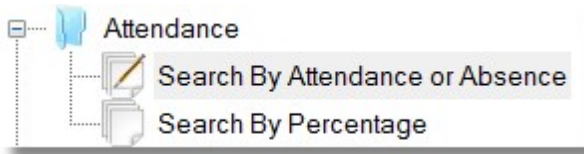
[Format](#)

Attendance

The attendance reports are designed to assist you in finding people who's attendance is slipping off. It also can assist in profiling your church into percentage attendance groups, with excellent Percentage Attendance Analysis.



Click on each of the report names in this category below to find out more...



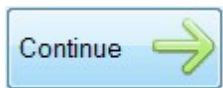
Search By Attendance or Absence

Purpose

The purpose of this report is to assist you in finding people who were or were not at a specific event on either a selected date or over a range of dates.

Pre-Flight

The Pre-Flight report options for the "Search By Attendance or Absence" report are shown below.



To display the selected report, press the Continue Button

See also [Attendance](#) reports for more information.



Click on each area to find out how this report is controlled.

Report Setup

Roll Project: Sunday Services Report Mode Family Individual

Search from: 9/09/2012 To: 9/09/2012

Attendance or Absent to search for

<input type="checkbox"/> Morning am1 <input type="checkbox"/> Morning am2 <input type="checkbox"/> Evening <input type="checkbox"/> Absent <input type="checkbox"/> Sick <input type="checkbox"/> Holiday <input type="checkbox"/> Other <input type="checkbox"/> Unknown	Ignore family if any family member attended any of the below selected events during the analysis period <input type="checkbox"/> Morning am1 <input type="checkbox"/> Morning am2 <input type="checkbox"/> Evening
--	---

The following MUST be TRUE to be included in the report..

Match ALL dates with ALL selected attendance / absence
 Match ALL dates with ANY selected attendance / absence
 Match ANY dates with ANY selected attendance / absence

- Names Report
- Manual Report
- All Family Information
- Standard Reports
- Custom
- Analysis

Help ? Close ↻ Continue →

Roll Project

Select the Roll Project that you want to report on. See [Setup Roll - Finance - Weekly Project](#) for information on setting up Roll Projects.

Search from To

Select a Date Range for this report to search through. If you select a Single Date like in the above example, then Pastoral Care will be looking for a specific attendance / absence code on that single day.

Select an Attendance or Absence state to search on. Remember that depending on which of the [Sort Types](#) you use, the more Attendance or Absence states that you tick, may reduce the possibility of getting any results on your report.

Shown right is a typical Attendance / Absence search list for Sunday services. Your actual events and Absent States may well vary from our example.

Attendance or Absence to search

- Morning am1
- Morning am2
- Evening
- Absent
- Sick
- Holiday
- Other
- Unknown

Select an Attendance state to Ignore A Family in the report if any Family Member was at a selected Attendance event.

Shown right is a typical Attendance search list for Sunday services. Your actual events and Absent States may well vary from our example.

Ignore family if any family member attended any of the below selected events during the analysis period

- Morning am1
- Morning am2
- Evening

The following MUST be TRUE to be included in the report..

- Match ALL dates with ALL selected attendance / absence
- Match ALL dates with ANY selected attendance / absence
- Match ANY dates with ANY selected attendance / absence

There are 3 different Search Types in the Attendance / Absence report area.

Match ALL Dates with ALL selected attendance / absence

This is a strict criteria search. A person must have all selected Attendance or Absence States on every date in the range for them to appear on this report. If you are searching only on one day, then you are more likely to get a report result, if you are searching over a range of dates, the larger the range, the less likely you will get any results with this report.

Match ALL Dates with ANY selected attendance / absence

This is a medium criteria search. A person must have at least one of the Attendance states, or Absence states during the date range search for them to appear on the report.

Match ANY Dates with ALL selected attendance / absence

This search is a low criteria report, in that it is easier to find people with this search type. A person needs only to have any of the selected Attendance states, or Absence states in any of the dates in the range to appear in the report.

The Roll Reports output, after a search is completed, can be sent to any of the Pastoral Care standard reports, or any of your Custom Reports / Custom Letters.

This includes our range of Statistical Analysis reports. For example, you can find out the age range of people attending your church more than 80% of the time by doing a [Search By Percentage](#) report, and output that to a Birthdate Analysis report.

See the [Pastoral Care Reports Master List](#) for a complete list of all available reports.

Report Mode Family Individual

Choose to force the selected report to Family Mode or Individual Mode. This setting will override any settings in the Sort area.

Sample Report

Since the output of all Roll Reports go to any report in the [Pastoral Care Reports Master List](#) we will not be showing a Sample Report.

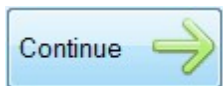
Search By Percentage

Purpose

The purpose of this report is to assist you in finding people who attendance patterns fit within a specified Percentage range. For optimum results with this report, you should be selecting a larger range of dates, as a Percentage Attendance report run across 2 weeks is not going to be very accurate!

Pre-Flight

The Pre-Flight report options for the "Search By Percentage" report are shown below.



To display the selected report, press the Continue Button

See also [Attendance](#) reports for more information.



Click on each area to find out how this report is controlled.

Report Setup

Roll Project: Sunday Services

Report Mode: Family Individual

Search from: 3/09/2012 To: 9/09/2012

Attendance to Analyse

Morning am1
 Morning am2
 Evening

Ignore family if any family member attended any of the below selected events during the analysis period

 Morning am1
 Morning am2
 Evening

- Names Report
- Manual Report
- All Family Information
- Standard Reports
- Custom
- Analysis

Include in report only those with the following percentage range...

To

Include percentage with given name

Help ?
Close ↻
Continue →

Roll Project

Select the Roll Project that you want to report on. See [Setup Roll - Finance - Weekly Project](#) for information on setting up Roll Projects.

Roll Project

Date Range

Select a Date Range for this report to search through. This report being attendance percentages, you should use a date range more than 1 week. The larger the sample, the more accurate the Percentage will be.

Search from To

Search On

Select an Attendance state to search on. Remember that the more attendance states you select, the more events a person needs to be at on one date to be included as 100% attended on that date.

Shown right is a typical Attendance search list for Sunday services. Your actual events may well vary from our example.

Attendance to Analyse

- Morning am1
- Morning am2
- Evening

Ignore

Select an Attendance state to Ignore A Family in the report if any Family Member was at a selected Attendance event.

Shown right is a typical Attendance search list for Sunday services. Your actual events may well vary from our example.

Ignore family if any family member attended any of the below selected events during the analysis period

- Morning am1
- Morning am2
- Evening

Percentage Settings

Include in report only those with the following percentage range...

80 To 100

Include percentage with given name

Percentage Range

Enter a From and To percentage range to search for. In our example above, Pastoral Care will find all people who have attended the selected event between 80% to 100% of the available events withing the selected date range.

Include Percentage with given name

Tick this option if you would like to see the actual percentage attended next to each person's name on the report that you select.

Standard Reports

The Roll Reports output, after a search is completed, can be sent to any of the Pastoral Care standard reports, or any of your Custom Reports / Custom Letters.

This includes our range of Statistical Analysis reports. For example, you can find out the age range of people attending your church more than 80% of the time by doing a [Search By Percentage](#) report, and output that to a Birthdate Analysis report.

See the [Pastoral Care Reports Master List](#) for a complete list of all available reports.

Family / Individual

Choose to force the selected report to Family Mode or Individual Mode. This setting will override any settings in the Sort area.

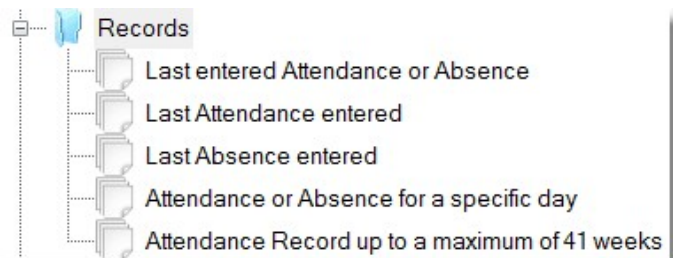
Report Mode Family Individual

Records

The Records reports are designed to help you find out more specific attendance or absent data for each person in the roll area.



Click on each of the report names in this category (right) to find out more...



Last Entered Attendance Or Absence

Use this report to show the last entered Attendance / Absence State for each person on the roll for a selected Roll Project.

Pre Flight

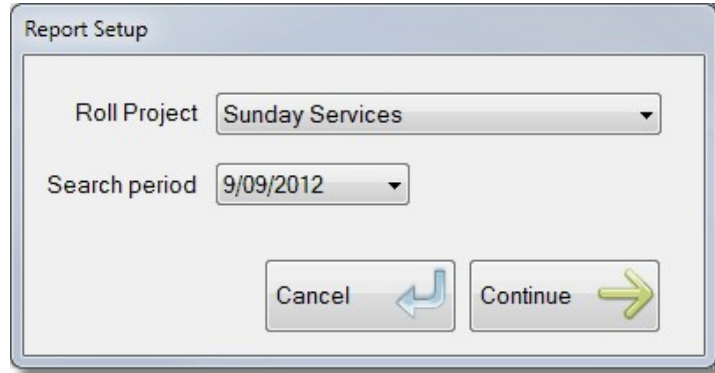
The Pre-Flight options for Last Entered Attendance or Absence state are shown below.

Roll Project

Select the Roll Project that you want to search through for Attendance and Absence states.

Search Period

Select a Date to start looking backwards from. The default date is the current date.



Sample Report

Shown Below is a sample Last Entered Attendance Or Absence report. This can be enhanced with Title Options found on the [Format](#) button on the Roll toolbar.

Roll Last Entry Report		Date	Attendance
Report search starting from 9/09/2012			
Allwright	Stephen		No Record of any Attendance or Absence
Allwright	Marion	25/12/2010	Morning am1
Angel	Peter	5/09/2012	Morning am1, Morning am2
Angel	Belinda		No Record of any Attendance or Absence
Angel	Helen	25/12/2010	Morning am2
Anglin	Brent	5/09/2012	Morning am1, Morning am2
Anglin	Katey	25/12/2010	Evening
Anglin	Mathew	25/12/2010	Evening
Anglin	Levi	5/09/2012	Morning am1, Morning am2
Anglin	Kerryn	25/12/2010	Evening
Baker	Joshua	5/09/2012	Morning am1, Morning am2
Baker	Ruth	5/09/2012	Morning am1, Morning am2

Last Attendance Entered

Use this report to show the last entered Attendance state for each person on the roll for a selected Roll Project.

Pre Flight

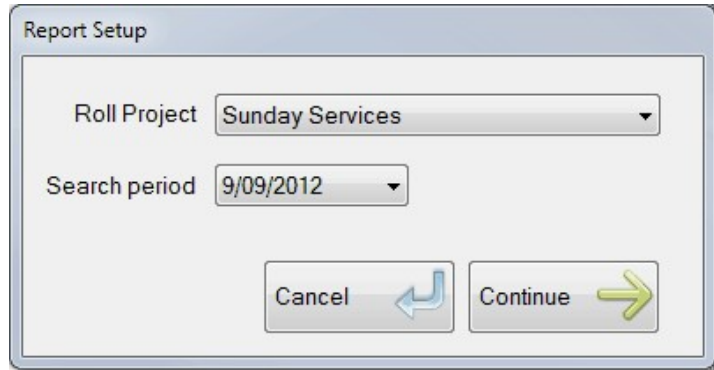
The Pre-Flight options for Last Entered Attendance state are shown below.

Roll Project

Select the Roll Project that you want to search through for Attendance states.

Search Period

Select a Date to start looking backwards from. The default date is the current date.



Last Absence Entered

Use this report to show the last entered Absence state for each person on the roll for a selected Roll Project.

Pre Flight

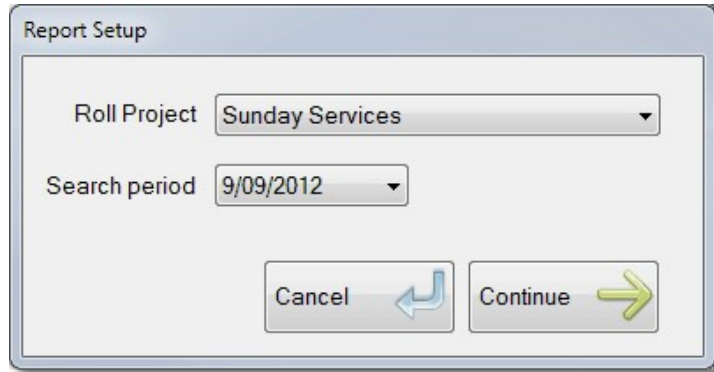
The Pre-Flight options for Last Entered Absence state are shown below.

Roll Project

Select the Roll Project that you want to search through for Absence states.

Search Period

Select a Date to start looking backwards from. The default date is the current date.



Sample Report

Shown Below is a sample Last Entered Absence report. This can be enhanced with Title Options found on the [Format](#) button on the Roll toolbar.

This report not only shows the Last Absence for each person, but it also includes the Last Attended Date as well.

Report search starting from 9/09/2012		Date	Last Absence	Last Attend
Allwright	Stephen		No Record of any Absence	
Allwright	Marion	25/09/2010	Absent	25/12/2010
Angel	Peter	12/06/2010	Absent	5/09/2012
Angel	Belinda		No Record of any Absence	
Angel	Helen	12/06/2010	Absent	25/12/2010
Anglin	Brent	11/12/2010	Sick	5/09/2012
Anglin	Katey	11/12/2010	Sick	25/12/2010
Anglin	Mathew	11/12/2010	Sick	25/12/2010
Anglin	Levi	11/12/2010	Sick	5/09/2012
Anglin	Kerryn	11/12/2010	Sick	25/12/2010
Baker	Joshua		No Record of any Absence	5/09/2012
Baker	Ruth		No Record of any Absence	5/09/2012
Barton	Ray		No Record of any Absence	5/09/2012
Barton	Ethel	11/12/2010	Absent	5/09/2012
Barton	Ernie	11/12/2010	Absent	5/09/2012
Barton	Karren	11/12/2010	Absent	25/12/2010

Attendance or Absence for a Specific Day

Use this report to find an Attendance or Absence on a specific date (day).

Pre Flight

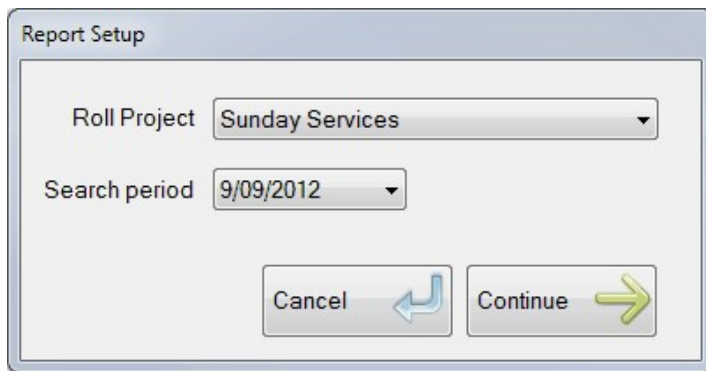
The Pre-Flight options for the Specific Day report are as follows:

Roll Project

Select the Roll Project that you want to search through for The Specific Day Report.

Search Period

Select a single Date to search on.



Sample Report

Shown Below is a sample Last Entered Absence report. This can be enhanced with Title Options found on the [Format](#) button on the Roll toolbar.

This report not only shows the Last Absence for each person, but it also includes the Last Attended Date as well.

Date of Record = 27/03/2010		Persons Record
Allwright	Stevo	No Record Entered
Allwright	maz	Evening
Angel	Peter	Morning am1
Angel	Belinda	No Record Entered
Angel	Helen	Morning am1
Anglin	Brent	Morning am1
Anglin	Katey	Evening
Anglin	Mathew	Evening
Anglin	Levi	Evening
Anglin	Kerryn	Evening
Baker	Josh	No Record Entered
Baker	Ruthie	No Record Entered
Baker	Gary	No Record Entered
Barton	Big Ray	No Record Entered
Barton	Mum	Absent
Barton	Ernie	Absent
Barton	Karren	Absent

Attendance Record max 41 Weeks

This is a very popular report that shows the number of events attended and missed for each person over a long period of time. The report selects Landscape or Portrait orientation automatically depending on how many weeks back you are reporting on.

Pre Flight

The Pre-Flight options for the Attendance Record report are as follows:

Roll Project

Select the Roll Project that you want to search through for The Attendance Record report.

Search Period

Select a single Date to start your search from.

Look Back

Enter the number of weeks (or event dates) that you want to look back on.

Sample Report

Shown Below is a sample Attendance Record Report. This can be enhanced with Title Options found on the [Format](#) button on the Roll toolbar.

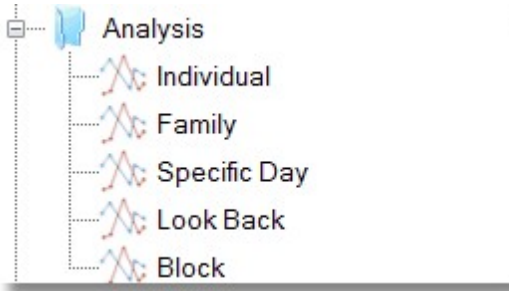
Roll Attendance Record Report		Dates																													
Legend: Space = No Record Numbers = Number of services attended A = Absent B = Sick C = Holiday D = Other																															
Name																															
Allwright	Stephen	0	2	2	1	0	2	1	0	0	2	1	0	0	2	1	0	2	2	1	0	2	2	1	0	3	2	1	1	0	2
Allwright	Marion	4	7	0	3	6	3	6	9	2	5	8	1	4	8	1	4	7	1	4	7	1	4	7	1	4	7	1	4	7	1
Angel	Peter	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	
Angel	Belinda	1	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Angel	Helen	2	1	1	1	1	0	0	0	0	9	9	9	8	8	8	8	7	7	7	7	7	7	7	7	7	7	7	7	6	
Anglin	Brent	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	
Anglin	Katey	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	
Anglin	Mathew	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Anglin	Levi	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Anglin	Kerryn	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Baker	Joshua	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Baker	Ruth	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Barton	Ray	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	

Analysis

The Analysis reports are more statistical in their focus and include narrowing down to a family or an individual.



Click on each of the report names in this category below to find out more...



Individual

The Individual Analysis report focuses in on the attendance / absence of a single person over a selected date range. This report also can include a graph.

Pre Flight

The Pre-Flight options for the Individual Roll Analysis report are shown here. Please note, these options are also used for the Family Analysis as well.

Roll Project

Select the Roll Project that you want to search through for The Specific Day Report.

Search Period

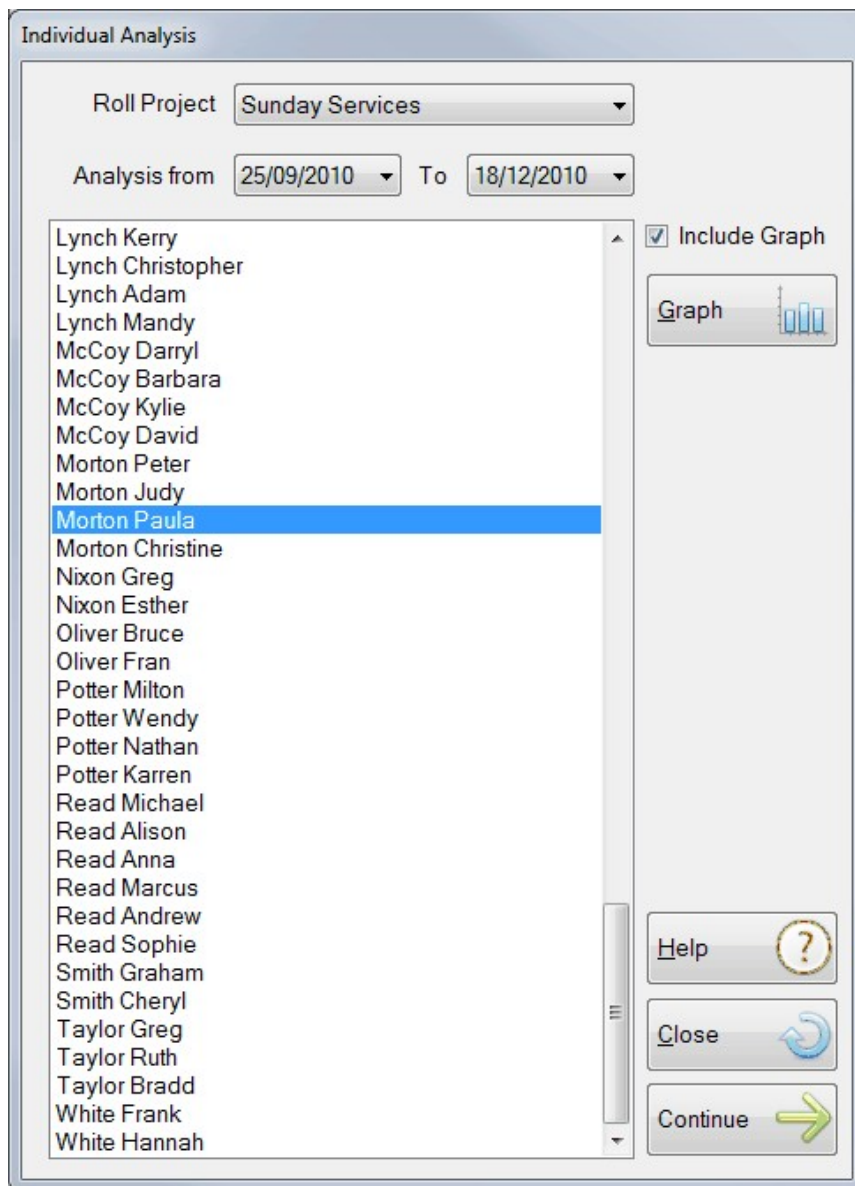
Select a single Date to search on.

Include Graph

Tick the Include Graph option, and press the Graph Button for setting Graph options for this report

Continue

Press the Continue Button to show the report.



Sample Report

Shown below is a sample Individual Analysis roll Report.

Individual Analysis

Analysis for Stephen Collins 06/11/2010 to 18/12/2010 (7 records)

Event	Total	%
Morning am1	2	28.6%
Morning am2	0	0%
Evening	6	85.7%

Absent State		
Absent State	Total	%
Absent	1	14.3%
Sick	0	0%
Holiday	0	0%
Other	0	0%
Unknown	0	
Attended all Events	0	
Average Attendance		38.1%

Percentage Attendance is calculated from All Events Attended by the person divided by All Available Events
 Unknown is the number of events that this person has no recorded Attendance or Absence state

Date	Event Attended
06/11/2010	Absent,
13/11/2010	Evening,
20/11/2010	Morning am1, Evening,
27/11/2010	Evening,
04/12/2010	Morning am1, Evening,
11/12/2010	Evening,
18/12/2010	Evening,

Family

The Family Analysis report focuses in on the attendance / absence of an entire Family over a selected date range. This report also can include a graph.

For a Family to be considered as attending an event, the entire family must be marked on the roll as such.

Pre Flight

The Pre-Flight options for the Family Roll Analysis report are as follows:

Roll Project

Select the Roll Project that you want to search through for The Specific Day Report.

Search Period

Select a single Date to search on.

Include Graph

Tick the Include Graph option, and press the Graph Button for setting Graph options for this report

Continue

Press the Continue Button to show the report.

Individual Analysis

Roll Project Sunday Services

Analysis from 25/09/2010 To 18/12/2010

- Lynch Kerry
- Lynch Christopher
- Lynch Adam
- Lynch Mandy
- McCoy Darryl
- McCoy Barbara
- McCoy Kylie
- McCoy David
- Morton Peter
- Morton Judy
- Morton Paula
- Morton Christine
- Nixon Greg
- Nixon Esther
- Oliver Bruce
- Oliver Fran
- Potter Milton
- Potter Wendy
- Potter Nathan
- Potter Karren
- Read Michael
- Read Alison
- Read Anna
- Read Marcus
- Read Andrew
- Read Sophie
- Smith Graham
- Smith Cheryl
- Taylor Greg
- Taylor Ruth
- Taylor Bradd
- White Frank
- White Hannah

Include Graph

Graph

Help

Close

Continue

Sample Report

A sample Family Analysis report is shown below. Attendance here is based on the entire family attending an event.

Family Analysis

Analysis for the Blackeby Family 01/05/2010 to 25/12/2010 (34 records)

As a family they all attended the following together -

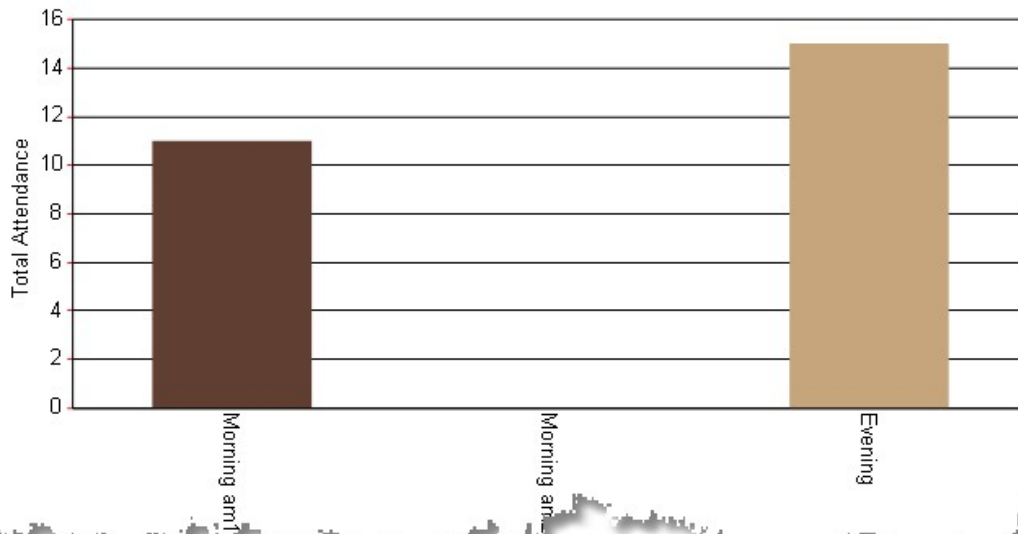
Event	Total	%
Morning am1	11	32.4%
Morning am2	0	0%
Evening	15	44.1%

Absent State

Absent	2	5.9%
Sick	7	20.6%
Holiday	0	0%
Other	0	0%

Average Attendance 25.5%

Average Attendance is calculated on all available events divided by all attendances the family has attended.



Specific Day

This report is designed to give you a detailed view of a single event on a single date.

Pre Flight

The Pre-Flight options for the Specific Date report are as follows:

Roll Project

Select the Roll Project that you want to search through for The Specific Day Report.

Search Period

Select a single Date to search on.

Include Graph

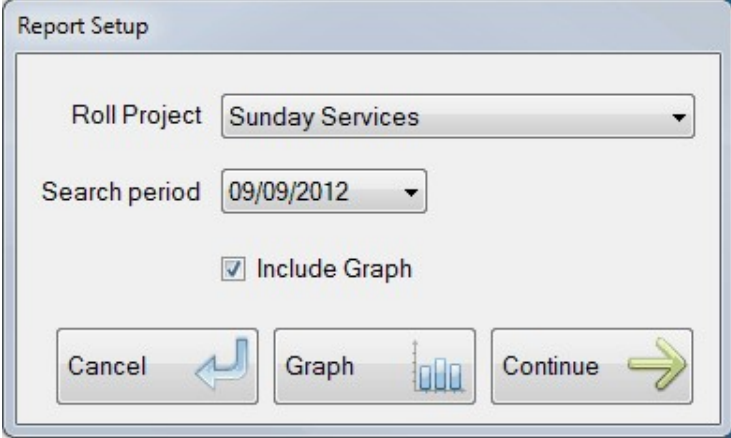
Tick this option to include a graph with this report.

Graph

Press the Graph Button to change the style and colors on the graph.

Continue

Press Continue to display the Specific Date Report



Report Setup

Roll Project Sunday Services

Search period 09/09/2012

Include Graph

Cancel Graph Continue

Sample Report

A sample Specific Date report is shown below.

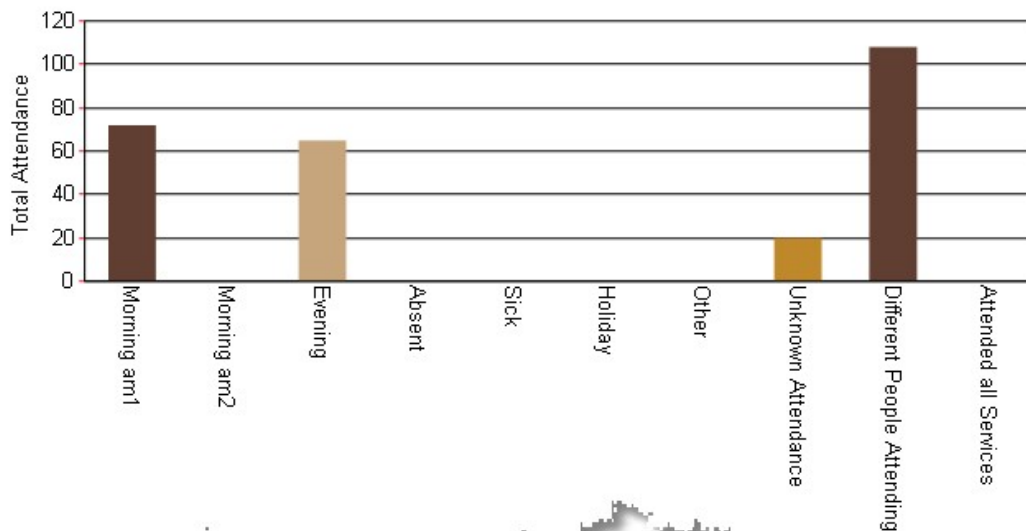
Specific Date Analysis

Analysis Date : 13/11/2010 Project : Sunday Services

Event	Attendance	Visitors	Total
Morning am1	72	0	72
Morning am2	0	0	0
Evening	65	0	65

Absent State	Total
Absent	0
Sick	0
Holiday	0
Other	0
Unknown	20
Different People Attending	108
Attended All Events	0

Different People Attending is the amount of different individuals who have attended one or more events for the day. Visitors are not included in the Different People Attending amount. Unknown is the total amount of people who have no attendance's attached to them.



Look Back

The Look Back roll report looks at a range of dates and does Average Attendance and Average Absentee rates for the selected Roll Project.

Pre Flight

The Pre-Flight options for the Look Back report are as follows:

Roll Project

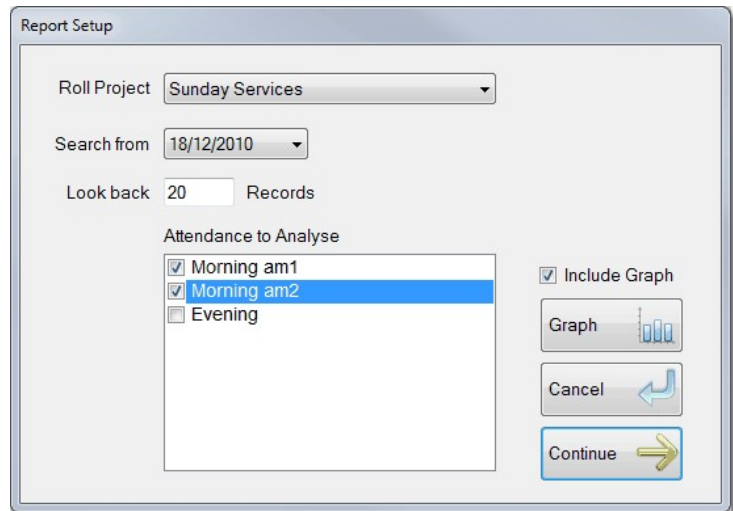
Select the Roll Project that you want to search through for The Specific Day Report.

Search From

Select a single Date to search on.

Look Back

Enter the number of event dates that you want to look back on the report.



Attendance To Analyse

Tick the Attendance state(s) that you want to analyse on the report. Note: The more events you tick, the lower the average

Include Graph

Tick this option to include a graph with this report.

Graph

Press the Graph Button to change the style and colors on the graph.

Continue

Press Continue to display the Specific Date Report

Sample Report

Shown below is a sample Look Back Analysis report.

Look Back Analysis

18/12/2010 to 22/05/2010 Project : Sunday Services (30 Records)

Event	Averages		
	Attendance	Visitors	Total
Morning am1	45.4	0	45.4
Morning am2	0	0	0
Evening	0	0	0
Absent State	Average Total		
Absent	15		
Sick	8.2		
Holiday	1.5		
Other	0.4		
Different People Attending	45.4		
Attended All Events	45.4		

Different People Attending is the amount of different individuals who have attended one or more events for the day. Visitors are not included in the Different People Attending amount.

Block

The Block Analysis looks at the attendance of each person in a Block or Group of dates, over a specified range of dates.

For each block of dates, an average percentage attendance is calculated for each person.

Pre Flight

The Pre-Flight options for the Block report are as follows:

Roll Project

Select the Roll Project that you want to search through for The Block report.

Search From

Select a single Date to search on.

Look Back

Enter the number of event dates that you want to look back on the report.

Attendance To Analyse

Tick the Attendance state(s) that you want to analyse on the report.

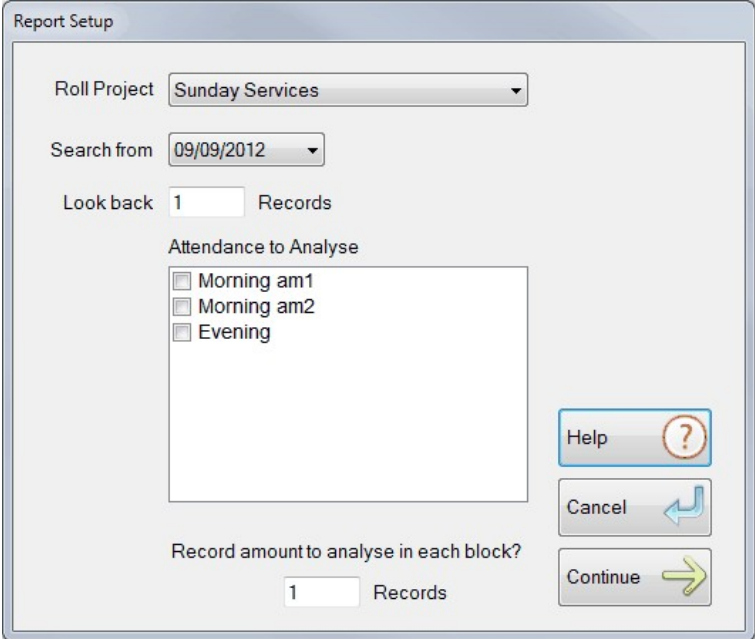
Please Note, if you tick more than one attendance state for analysis, a person will only be considered as attending if they were at each of the selected events on the same day / date.

Record Amount to Analyse in each block

Enter the number of event dates that you want to group together as an analysis block. The Attendance Analysis for each block is grouped for each person and averaged on the report.

Continue

Press Continue to display the Specific Date Report



Report Setup

Roll Project: Sunday Services

Search from: 09/09/2012

Look back: 1 Records

Attendance to Analyse

Morning am1

Morning am2

Evening

Record amount to analyse in each block?

1 Records

Help ?

Cancel ↶

Continue →

Sample Report

Shown below is a sample block analysis report.

# = No data available for analysis		18/12/2010	20/11/2010	16/10/2010	18/09/2010	21/08/2010
		To 27/11/2010	To 23/10/2010	To 25/09/2010	To 28/08/2010	To 31/07/2010
Allwright	Stephen	#	#	#	#	#
Allwright	Marion	37.5%	37.5%	25%	25%	25%
Angel	Peter	37.5%	12.5%	12.5%	37.5%	25%
Angel	Belinda	#	#	#	#	#
Angel	Helen	37.5%	12.5%	12.5%	37.5%	25%
Anglin	Brent	12.5%	12.5%	37.5%	37.5%	25%
Anglin	Katey	37.5%	12.5%	25%	25%	25%
Anglin	Mathew	37.5%	12.5%	25%	25%	25%
Anglin	Levi	37.5%	12.5%	25%	25%	25%
Anglin	Kerryn	37.5%	12.5%	25%	25%	25%
Baker	Joshua	#	#	#	#	#
Baker	Ruth	#	#	#	#	#
Barton	Ray	#	#	#	#	#
Barton	Ethel	25%	25%	0%	12.5%	25%
Barton	Ernie	25%	25%	12.5%	12.5%	25%
Barton	Karren	12.5%	25%	12.5%	25%	25%
Blackeby	Dot	37.5%	25%	0%	0%	0%
Blackeby	Helen	0%	12.5%	37.5%	25%	0%
Blackeby	Heather	12.5%	12.5%	37.5%	25%	0%

Notes Attached to Records

The Notes Attached To Records report allows you to print out or view the Roll Notes for a selected Roll Project over a range of dates.

Pre Flight

This notes attached to Records window is the same for Roll, Finance and Weekly areas. We are describing the Roll Notes pre flight options below as an example for all 3 areas.

The Pre-Flight options for the Notes report are as follows:

Roll Project

Select the Roll Project that you want to search through for The Specific Day Report.

Calender Year

Select a Calender Year to get all notes from the selected Roll Project.

Financial Year

Select a Financial Year to get all notes from the selected Roll Project

Date Range

Use a manual date range to search for Roll Notes

Continue

Press Continue to display the Roll Notes Report

Sample Report

The Roll Notes report is shown below.

Roll Record Notes Report	
01/01/2010 to 31/12/2010	
25/12/2010	Christmas Service was a combined service this year with 2 other churches. Heaps of Visitors!

Financial Records

There are many and varied software financial packages that are used by each church to manage their finances. Including General Ledger features, accounts etc. Pastoral Care to date has never attempted to replace these packages, rather we have sought to provide a simple tool for Pastoral Teams to see financial trends in individual and project based giving.

Use this area to see trends in giving and to provide feedback on giving to specific projects. You can also use Financial Records to accept personally identifiable donations to projects allowing for receipts to be printed and distributed to the donating individual.

This feature can be found on the Church Tab from the main menu. See [Church Introduction](#).

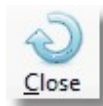
P.I.N Numbers

Pastoral Care can use a Personal Identification Number for recording Financial Records against. This allows for privacy during data entry and some reports. (Naturally a Receipt Report will have a person's name on it!) More information on setting up the PIN Number can be found in the [Personal Details](#) section of the Family File.

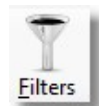
Security

If you want to enable data entry with PIN numbers only (so that people do not know who is donating how much) you must [Setup Security](#) access for Pastoral Care and restrict people to PIN only access where required.

Tool Bar



Exit the Financial Records Area.



Use the Pastoral Care standard [Filters](#) to load in different selected groups of people instead of just all people



Load all people or filtered people into the Data Entry list for creating a new Financial Record.



Use the [Format](#) button to modify report behavior

OR: Load in all people / filtered people using View/Alter for editing an existing Financial Record.



Save the current Financial Records data entry process, and close off this record. (IE: Finalise this record)



Open the standard Pastoral Care [Toolbox](#)



Save the current Financial Records data entry process, but leave it open for continued data entry.



Access the Pastoral Care Help system.

Menu List

Select to either Add / Edit Financial Records, or run Reports on the Financial Records Area.

Add/Edit Records
Reports

See [Adding Records](#), [Editing Records](#) and [Reports](#)

Load Records By

Choose the order to list people in the data entry area.

Load Records By P.I.N. Order Name Order

Pin Order Load

Select this to load all people in the order of their Personal Identification Number

Name Order Load

Select this to load all people in Alphabetical Order by Surname

Select Project

Select the Financial Project you want to use for Editing or Adding records to. See [Setup Roll - Finance - Weekly Project](#) for information on creating Financial Projects.

Finance Project Building Fund

Add New Record

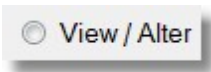
Choose this option and select a date for adding a new record to the selected Financial Project.

Add New Record Saturday , 15 September 2012

Pressing the Load Button after choosing this option will load in all people or filtered people into the Financial Records area ready for data entry against the selected Project for the date selected here.

View / Alter

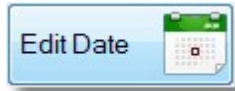
Choose this option to be shown a list of available dates for Viewing or Altering the Financial Records against. The dates shown will be only for the selected Financial Project.



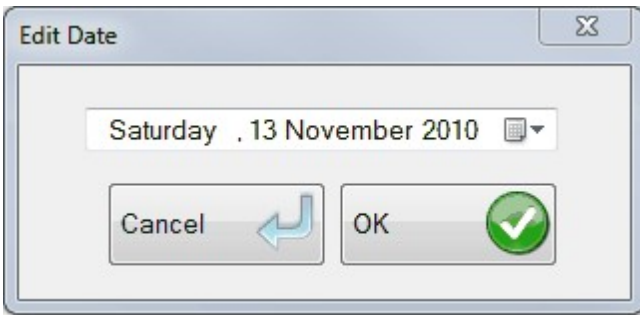
See also [Date List](#)

Edit Date

After selecting a date from the [Date List](#) you can press the Edit Date button to allow you to change the date to another date. No information will be lost as all records saved on that date will be moved to the new date you enter.

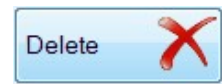


The Edit Date window pops up (shown below) allowing you to select a new date.



Delete

After selecting a date from the [Date List](#) you can press the Delete Button to remove that Financial Record. This deletion cannot be undone, so be sure you are happy to remove it.



You are offered a warning giving you a chance to change your mind...



Portrait

When available, a Family / Individual Portrait will be shown here for the currently selected person. If you are doing PIN data entry with no names visible, the Portrait will not be shown.

See [Setup - Global / General Options](#) for options on disabling the display of Portraits in Pastoral Care.

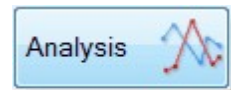
Date List

Select a date to either load (by pressing the Load Button) or Modify a date or delete a date.

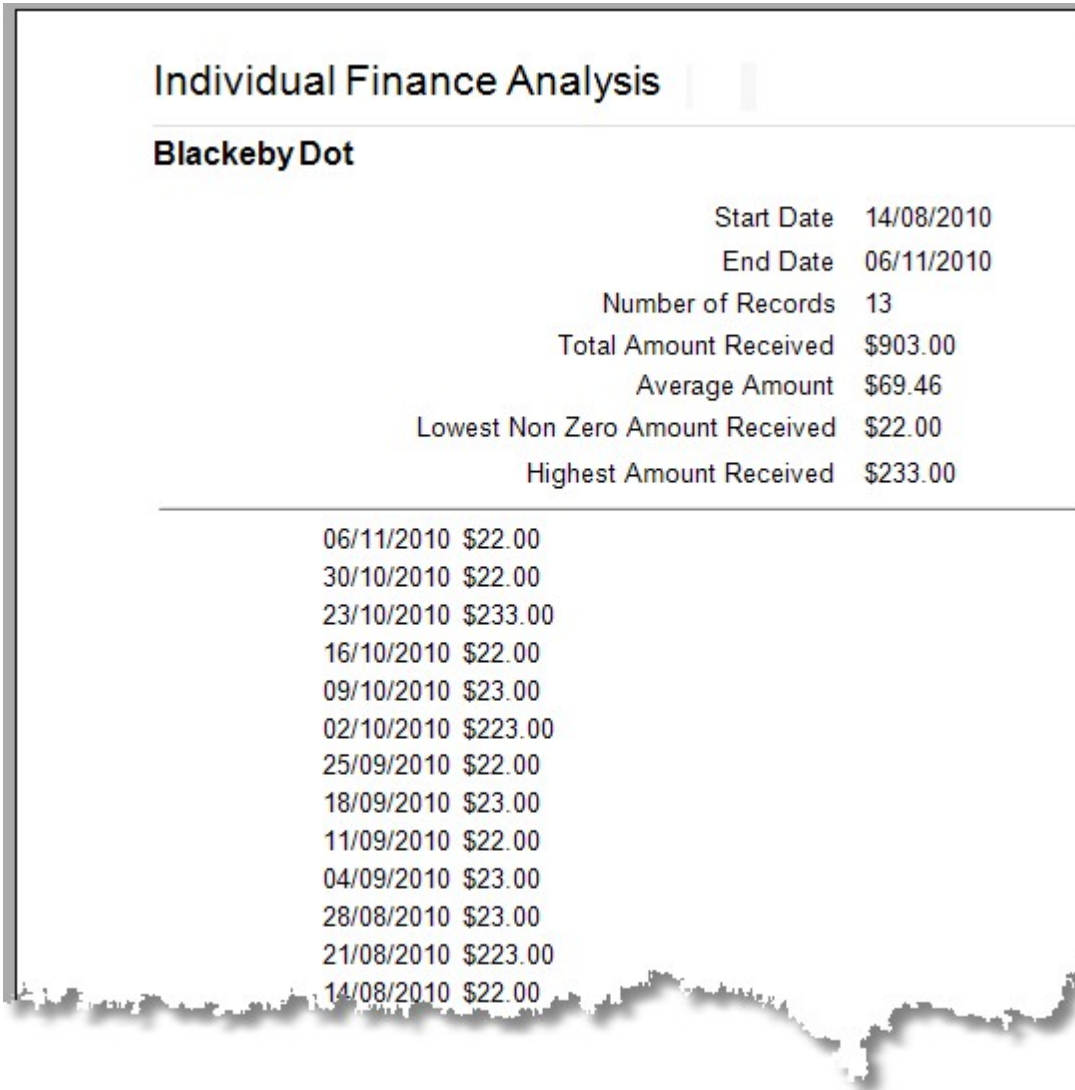
13/11/2010	03/07/2010	20/03/2010
06/11/2010	01/07/2010	13/03/2010
30/10/2010	26/06/2010	06/03/2010
23/10/2010	19/06/2010	27/02/2010
16/10/2010	12/06/2010	20/02/2010
09/10/2010	05/06/2010	13/02/2010
02/10/2010	29/05/2010	06/02/2010
25/09/2010	22/05/2010	23/01/2010
18/09/2010	15/05/2010	16/01/2010
11/09/2010	08/05/2010	09/01/2010
04/09/2010	01/05/2010	02/01/2010
28/08/2010	24/04/2010	
21/08/2010	17/04/2010	
14/08/2010	10/04/2010	
07/08/2010	03/04/2010	
24/07/2010	27/03/2010	

Analysis

Pressing this button on a selected person or PIN will show an Individual Analysis report. Options are presented to you just before the report loads to select the date range.

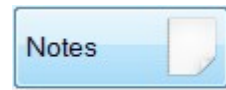


A sample Individual Analysis Report is shown below.



Notes

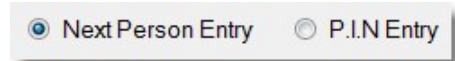
Press this button to add some comments to the current Data Entry. These notes are stored with the selected Project / Date, and not with any individual person.



Entry Method

Next Person Entry

Choose this method to allow Pastoral Care to automatically move to the next person in the list and let you enter in the Amount of donation.

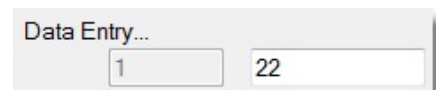


PIN Entry

This method requires you to enter a PIN number and the AMOUNT, pressing the Enter key after each entry. Names or PIN number lists are not loaded in this mode.

Data Entry Fields

When in PIN entry mode, you will need to enter a PIN number and the \$ amount, if you are in Next Person mode, Pastoral Care will select a person and you enter the \$ amount only.



Note, you can enter out of order by manually clicking on the Amount field next to the name or PIN number that you want to record an amount against.

Entry List

The Entry List is shown right in Name mode, if you were using a Security Setting that limited your login to PIN Numbers only, then the Name Column would not be filled in.

You can click on any column title to sort the list by that Column.

Name	P.I.N.	\$ Amount
Blackeby Dot	1	\$22.00
Anglin Brent	2	\$33.00
Angel Peter	3	
Brown Peter	4	\$44.00
Dimsey Richard	5	\$56.00
Dobber Hugo	6	\$7.00
Eadon Jack	7	
Gray Peter	8	\$89.00
Gordan Frank	9	\$1.00
French Harry	10	\$23.00
Flemming John	11	\$11.00
Iles Bill	12	\$33.00
Jones Charlie	13	
Kean Steve	14	
Lynch Allan	15	
Leah Adam	16	
Knight Mike	17	
McCoy Darryl	18	
Morton Peter	19	
Nixon Greg	20	
Oliver Bruce	21	
Potter Milton	22	

Adding Records

Here is a Step by step guide for adding records to a Financial Project.

1. Choose Financial Records from the Church Tab on the main menu
2. Select the Financial Project to record income against
3. Select Add New Record and change the date to the date of the collection of donations / offering
4. Press Load to load in all people, or use Filters first to restrict your load of people
5. Choose a data entry method. Either Next Person Entry or PIN entry
6. Complete the data entry for each person
7. Press Save on the Toolbar.

Editing Records

Here is a Step by step guide for Editing records in a Financial Project.

1. Choose Financial Records from the Church Tab on the main menu
2. Select the Financial Project to edit
3. Select View / Alter and select a date from the Date List that you want to edit.
4. Press Load to load in all people recorded that day, or use Filters first to restrict your load of people
5. Click on any Amount values to edit and make the changes needed.
6. Enter a ZERO amount against a person or PIN to store no value if needed
7. Press Save on the Toolbar.

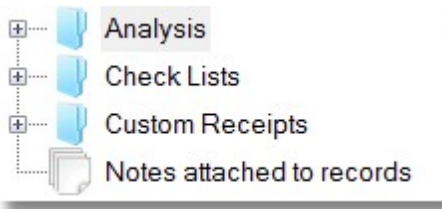
Reports

The Reports section of the Financial Records area allows you to run reports for analysis of donations to various projects, as well as individual Receipt Reports for producing a receipt for an individual.

If your security login only gives you access to PIN numbers in the finance area, you will be unable to run Receipt Reports.



There are 3 areas for Financial Reports, click on each item below for more information.



Analysis

There are 3 analysis reports in the Financial Records area.



Click on each report for more information...



Total Analysis

The Total Analysis Financial Report is a Total Project report with no individual information on the report. This is great for summarising the total donations over a selected period for a specific Fund.

Pre Flight

The Pre-Flight options for the Total Analysis report are shown here.

Finance Project

Select the Finance Project that you want to show the Total Analysis Report on.

Calendar Year

Choose a Calendar Year to report on.

Financial Year

The screenshot shows a 'Report Setup' dialog box with the following settings:

- Finance Project: Building Fund
- Calendar Year: 2010 (selected with a radio button)
- Financial Year: (unselected)
- Date Range: 13/11/2010 To 13/11/2010

 At the bottom, there are three buttons: 'Help' (with a question mark icon), 'Cancel' (with a left arrow icon), and 'Continue' (with a right arrow icon).

Choose a standard Financial Year to report on.

Date Range

Set your own date range to report on

Continue

Press the Continue Button to show the report.

Sample Report

Shown below is a sample Total Finance Analysis report.

Total Finance Analysis	
Finance Project	Building Fund
Start Date	01/01/2010
End Date	31/12/2010
Total Amount Received	\$27,507.52
Average Amount	\$98.24
Lowest Non Zero Amount Received	\$1.00
Highest Amount Received	\$908.00

P.I.N. Analysis

The P.I.N. analysis report shows a summary of donations given for a selected Roll Project over a selected date range.

Pre Flight

The Pre-Flight options for the P.I.N Analysis and People Analysis report are shown here.

Finance Project

Select the Finance Project that you want to show the P.I.N. Analysis Report on.

Calender Year

Choose a Calender Year to report on.

Financial Year

Choose a standard Financial Year to report on.

Date Range

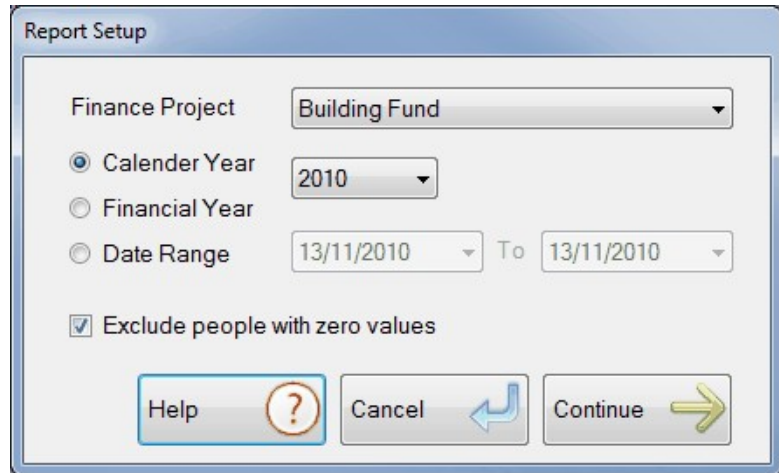
Set your own date range to report on

Exclude People with zero values

This option will remove people from the report that have not given any donations to the selected fund in the Report Date Range.

Continue

Press the Continue Button to show the report.



The screenshot shows a 'Report Setup' dialog box with the following settings:

- Finance Project: Building Fund
- Calendar Year: 2010
- Financial Year: (unselected)
- Date Range: 13/11/2010 To 13/11/2010
- Exclude people with zero values: (checked)

Buttons at the bottom: Help (with a question mark icon), Cancel (with a left arrow icon), and Continue (with a right arrow icon).

Sample Report

Shown below is a sample P.I.N. Analysis Report

P.I.N. Analysis

		Finance Project	Building Fund		
		Start Date	01/01/2010		
		End Date	31/12/2010		
	P.I.N.	Total	Average	Record Count	
	1	\$2,438.95	\$58.07	42	
	2	\$1,977.78	\$68.20	29	
	3	\$2,477.00	\$91.74	27	
	4	\$2,127.89	\$96.72	22	
	5	\$3,724.00	\$120.13	31	
	6	\$2,477.00	\$103.21	24	
	7	\$2,967.00	\$197.80	15	
	8	\$2,601.90	\$118.27	22	
	9	\$2,267.00	\$141.69	16	
	10	\$616.00	\$56.00	11	
	11	\$603.00	\$75.38	8	
	12	\$458.00	\$91.60	5	
	13	\$557.00	\$185.67	3	
	14	\$768.00	\$256.00	3	

People Analysis

This report is the same as the [P.I.N. Analysis](#) report, except that names are also included.

Pre Flight

The Pre-Flight options for the P.I.N Analysis and People Analysis report are shown here.

Finance Project

Select the Finance Project that you want to show the P.I.N. Analysis Report on.

Calender Year

Choose a Calender Year to report on.

Financial Year

Choose a standard Financial Year to report on.

Date Range

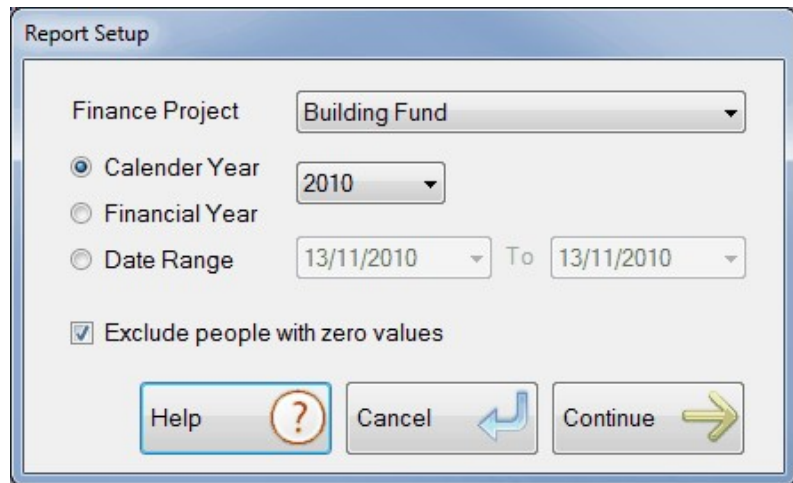
Set your own date range to report on

Exclude People with zero values

This option will remove people from the report that have not given any donations to the selected fund in the Report Date Range.

Continue

Press the Continue Button to show the report.



The screenshot shows a 'Report Setup' dialog box with the following settings:

- Finance Project: Building Fund
- Calendar Year: 2010 (selected with a radio button)
- Financial Year: (unselected with a radio button)
- Date Range: 13/11/2010 To 13/11/2010 (unselected with a radio button)
- Exclude people with zero values: checked

At the bottom, there are three buttons: Help (with a question mark icon), Cancel (with a left arrow icon), and Continue (with a right arrow icon).

Sample Report

This report is the same as the [P.I.N. Analysis](#) report, except that names are also included. See Sample Report Below...

People Analysis

Finance Project Building Fund
 Start Date 01/01/2010
 End Date 31/12/2010

P.I.N.	Name		Total	Average	Record Count
26	Allwright	Stephen	\$10.00	\$10.00	1
27	Allwright	Marion	\$20.00	\$20.00	1
3	Angel	Peter	\$2,477.00	\$91.74	27
2	Anglin	Brent	\$1,977.78	\$68.20	29
1	Blackeby	Dot	\$2,438.95	\$58.07	42
4	Brown	Peter	\$2,127.89	\$96.72	22
5	Dimsey	Richard	\$3,724.00	\$120.13	31
6	Dobber	Hugo	\$2,477.00	\$103.21	24
7	Eadon	Jack	\$2,967.00	\$197.80	15
11	Flemming	John	\$603.00	\$75.38	8
10	French	Harry	\$616.00	\$56.00	11
9	Gordan	Frank	\$2,267.00	\$141.69	16
8	Gray	Peter	\$2,601.90	\$118.27	22
12	Iles	Bill	\$458.00	\$91.60	5
13	Jones	Charlie	\$557.00	\$185.67	3
14	Kean	Steve	\$768.00	\$256.00	3
17	Knight	Mike	\$35.00	\$35.00	1

Check Lists

The Check List reports here are designed for manual recording of amounts etc for collection of money at one point.

There are 2 main types, being P.I.N. check lists, and Name Check Lists.

See the following sample reports...

[P.I.N Check List 1](#)

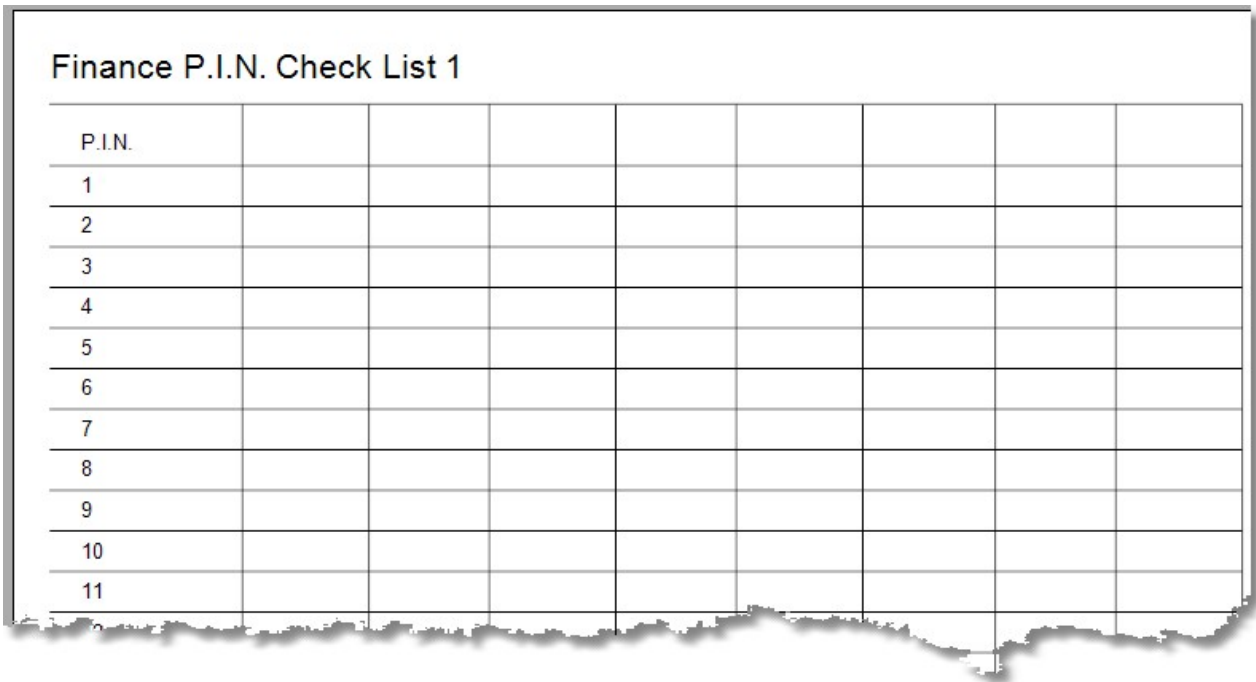
[P.I.N Check List 2](#)

[Name Check List 1](#)

[Name Check List 2](#)

P.I.N Check List 1

A sample P.I.N Check list is shown below.



Finance P.I.N. Check List 1

P.I.N.								
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								

P.I.N Check List 2

A sample P.I.N Check list is shown below.

Finance P.I.N. Check List 2

P.I.N.				
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				

Name Check List 1

A Sample Name Check List is shown below.

Finance Name Check List 1

		P.I.N.				
Allwright	Stephen	26				
Allwright	Marion	27				
Angel	Peter	3				
Anglin	Brent	2				
Blackeby	Dot	1				
Brown	Peter	4				
Dimsey	Richard	5				
Dobber	Hugo	6				
Eadon	Jack	7				
Flemming	John	11				
French	Harry	10				
Gordan	Frank	9				
Gordan	Lorna	25				

Name Check List 2

A Sample Name Check List is shown below.

Finance Name Check List 2

		P.I.N.		
Allwright	Stephen	26		
Allwright	Marion	27		
Angel	Peter	3		
Anglin	Brent	2		
Blackeby	Dot	1		
Brown	Peter	4		
Dimsey	Richard	5		
Dobber	Hugo	6		
Eadon	Jack	7		
Flemming	John	11		
French	Harry	10		
Gordan	Frank	9		
Gordan	Loma	25		
Gray	Peter	8		
	Bill	12		

Custom Receipts

A Custom Receipt must be designed for use in Pastoral Care. See [Custom Report Designer](#) for information on how to create your own receipts. You can try one of our sample receipts that is installed by default, however you will want to modify these most likely for your own use.

Pre Flight

The Pre-Flight options for the Custom Receipt report is shown here.

To use this window to get a Receipt on the screen, select the Finance Project, Select a Year that you want the receipts printed over, or select a Date Range. Press Load and tick the people / person that you want to print a receipt for.

Finance Project

Select the Finance Project that you want to print receipts for.

Calender Year

Choose a Calender Year to report on.

Financial Year

Choose a standard Financial Year to report on.

Date Range

Set your own date range to report on

Exclude People with zero values

This option will remove people from the report that have not given any donations to the selected fund in the Report Date Range.

Continue

Press the Continue Button to show the receipt report.

Custom Receipt Setup

Finance Project: Building Fund

Calender Year: 2010
 Financial Year
 Date Range: 13/11/2010 To 13/11/2010

Exclude people with zero values

<input type="checkbox"/>	Allwright Marion	\$30.00
<input type="checkbox"/>	Angel Peter	\$2,507.00
<input type="checkbox"/>	Anglin Brent	\$4,484.78
<input type="checkbox"/>	Blackeby Dot	\$6,923.73
<input type="checkbox"/>	Brown Peter	\$9,051.62
<input type="checkbox"/>	Dimsey Richard	\$12,775.62
<input checked="" type="checkbox"/>	Dobber Hugo	\$15,252.62
<input type="checkbox"/>	Eadon Jack	\$18,219.62
<input type="checkbox"/>	Flemming John	\$18,822.62
<input type="checkbox"/>	French Harry	\$19,438.62
<input type="checkbox"/>	Gordan Frank	\$21,705.62
<input type="checkbox"/>	Gordan Lorna	\$21,705.62
<input type="checkbox"/>	Gray Peter	\$24,307.52
<input type="checkbox"/>	Iles Bill	\$24,765.52
<input type="checkbox"/>	Jones Charlie	\$25,322.52
<input type="checkbox"/>	Kean Steve	\$26,090.52
<input type="checkbox"/>	Knight Mike	\$26,125.52
<input type="checkbox"/>	Leah Adam	\$26,270.52
<input type="checkbox"/>	Lynch Allan	\$26,471.52
<input type="checkbox"/>	McCoy Darryl	\$26,639.52
<input type="checkbox"/>	Morton Peter	\$26,717.52
<input type="checkbox"/>	Nixon Greg	\$26,783.52
<input type="checkbox"/>	Oliver Bruce	\$26,817.52
<input type="checkbox"/>	Potter Milton	\$27,084.52
<input type="checkbox"/>	Read Michael	\$27,207.52

Sample Receipt Report

Pastoral Care Training Church

Received From: Dimsey Richard
7 Woods St
Melton 3091 VIC

Receipt Date Range
01/01/2010
31/12/2010

Amount **\$12,775.62**

Notes Attached to records

Use this report to view any Financial Notes attached to data recording records.

Weekly Statistics

The Weekly Statistics area is designed to offer your church leadership team a broad overview of attendance and financial statistics for weekly based events (projects).

This area does not provide as much detail as the [Roll](#) Program (Which can analyse individuals and families attendance), rather this area provides numbers only for selected weekly projects. It includes areas to save information for many projects, including multiple offering / giving categories and attendance categories, all of which are user defined in the set up area of Pastoral.

See [Setup Roll - Finance - Weekly Project](#) for more information on setting up this area.

Using the Weekly Statistics Area

To start the Weekly Statistics area, select Weekly Statistics from the Church Tab on the main menu. The [Weekly Statistics Main Screen](#) is displayed.

Weekly Statistics Main Screen

From the Weekly Statistics window you can select to [Add / Edit Records](#) or to run Weekly Statistics [Reports](#)



Click on the different elements of the Weekly Statistics window below to learn more about each of these features. Please note: Some items shown below are disabled. Not all features are available in all circumstances.

You can still click on different areas on this graphic to learn about each area of this window.

Tool Bar

The Weekly Statistics toolbar buttons are shown below. These are all shown active, however some of them are only available under varying conditions.



Press the Load Button to start entering a new Weekly Statistics record against the selected Date and Weekly Project



Press Process to display a selected report. This button is only available for Weekly [Reports](#)



Press Save to complete your data entry and finalise it. If you accidentally press this, you can still use View/Alter to continue editing a record.



This is the standard Pastoral Care Format control. This is available in all reporting areas. Full details can be found at [Format](#)



Press the Update button to Save your data entry and pause working. This leaves the data entry process saved, but able to be continued.



[See Toolbox](#) for full details on the Toolbox Button

Weekly Project

Select the Weekly Project that you want to either Add a record on, or Alter a record.

Weekly Project Sunday main ▼

Add New Record

Choose this option to create a new Weekly Statistics record to record attendance and finance against.

Add New Record Sunday . 16 September 2012 📅 ▼

Select your date for the event date you are entering, and press Load on the tool bar to start the data entry process.

View / Alter

Choose this option to reveal a [Record List](#) of dates you can select from for Viewing and or Altering the information in.

View / Alter

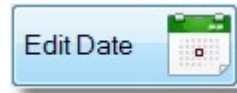
Record List

Select a date from this list for Viewing or Editing.

16/09/2012	19/06/2010
25/12/2010	12/06/2010
18/12/2010	05/06/2010
11/12/2010	29/05/2010
04/12/2010	22/05/2010
27/11/2010	15/05/2010
20/11/2010	08/05/2010
13/11/2010	01/05/2010
06/11/2010	24/04/2010
30/10/2010	17/04/2010
23/10/2010	10/04/2010
16/10/2010	03/04/2010
09/10/2010	27/03/2010
02/10/2010	20/03/2010
25/09/2010	13/03/2010
18/09/2010	06/03/2010
11/09/2010	27/02/2010
04/09/2010	20/02/2010
28/08/2010	13/02/2010
21/08/2010	06/02/2010
14/08/2010	29/01/2010
07/08/2010	22/01/2010
31/07/2010	15/01/2010
24/07/2010	08/01/2010
17/07/2010	01/01/2010
10/07/2010	
03/07/2010	
26/06/2010	

Edit Date

Press this button to allow you to change a date already recorded to another date. This is ideal if you have accidentally saved a Weekly Record on the wrong date.



Delete Date

After selecting a date from the [Record List](#) you can press the Delete Button to remove that selected Weekly Statistics Record. This deletion cannot be undone, so be sure you are happy to remove it.

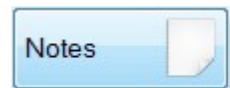


You are offered a warning giving you a chance to change your mind...



Notes

Press this during a Data Entry process to record any relevant notes about that weekly event you are recording statistics against.



Finance Data Entry

Enter the Financial Data in this area. The box you do the entry in is highlighted with the mouse pointer in the picture below.

Financial Giving Total = \$0.00	
Category	\$ Amount
AM Offering	
S/S Offering	
Building Fund	
Community Chest	
O/S Missions	
Local Missions	

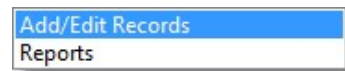
Attendance Data Entry

Enter the Attendance Data in this area. The box you do the entry in is highlighted with the mouse pointer in the picture below.

Attendance Total = 0	
Category	Attendance
AM Attendance	
S/S Attendance	
Evening Attendance	
Home Group 1	
Home Group 2	
Home Group 3	
Baptised	
Born Again	
Membership	

Weekly Statistics Menu

Choose to either [Add / Edit Records](#) or run Weekly Statistics [Reports](#)



See Also [Weekly Statistics Main Screen](#)

Add / Edit Records

Here is a Step by step guide for adding records to a Weekly Project.






1. Choose Weekly Statistics from the Church Tab on the main menu
2. Select the Weekly Project to record statistics against
3. Select Add New Record and change the date to the date of the event you are recording for
4. Press Load on the tool bar
5. Complete the Financial Statistics and Attendance Statistics
6. Press Save on the tool bar.

Reports

When you click on the Reports option in Weekly Statistics, the following reports and reporting areas are ready for use.



Click on each item below for more information.

-  Monthly Analysis
-  Yearly Analysis
-  Record Analysis
-  Raw Data
-  Notes attached to records

Monthly Analysis

Monthly Analysis Reports are great snapshots of Attendance and Income Categories for your management team. They show full tables of each month with categories and totals. There are 3 reports in this section, and each report uses the same [Pre Flight](#) settings.



Click on each report below to learn about each report, and also see the [Pre Flight](#) settings for these 3 Monthly Reports.



Pre Flight

The Pre Flight report options for Weekly Statistics Monthly Reports are shown below.



Click on each part of this screen to learn more.

Report Setup

Weekly Project Sunday main

Calender Year 2012 01/07/2011 to 30/06/2012
 Financial Year
 Date Range 16/09/2012 To 16/09/2012

Giving Category	Analyse	Graph
AM Offering	<input type="checkbox"/>	<input type="checkbox"/>
S/S Offering	<input type="checkbox"/>	<input type="checkbox"/>
Building Fund	<input type="checkbox"/>	<input type="checkbox"/>
Community Chest	<input type="checkbox"/>	<input type="checkbox"/>
O/S Missions	<input type="checkbox"/>	<input type="checkbox"/>
Local Missions	<input type="checkbox"/>	<input type="checkbox"/>

Attendance Category	Analyse	Graph
AM Attendance	<input type="checkbox"/>	<input type="checkbox"/>
S/S Attendance	<input type="checkbox"/>	<input type="checkbox"/>
Evening Attendance	<input type="checkbox"/>	<input type="checkbox"/>
Home Group 1	<input type="checkbox"/>	<input type="checkbox"/>
Home Group 2	<input type="checkbox"/>	<input type="checkbox"/>
Home Group 3	<input type="checkbox"/>	<input type="checkbox"/>
Baptised	<input type="checkbox"/>	<input type="checkbox"/>
Born Again	<input type="checkbox"/>	<input type="checkbox"/>
Membershin	<input type="checkbox"/>	<input type="checkbox"/>

Select Project

Weekly Project Sunday main

Select the Weekly Statistics Project that you want to report on. See also [Setup Roll - Finance - Weekly Project](#) for information on setting up the Weekly Statistics projects.

Date Range

Select a Date Range to set the Monthly Report on. These can be any of the following.

Financial Year (Standard Australian Fiscal Year July 1 - 30 June)

Calender Year

Selected Date Range.

Calender Year 2012 01/07/2011 to 30/06/2012
 Financial Year
 Date Range 16/09/2012 To 16/09/2012

Note the Date Range will only allow you to select dates that already exist for the selected project.

Giving Category

Giving Category	Analise	Graph
AM Offering	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
S/S Offering	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Building Fund	<input type="checkbox"/>	<input type="checkbox"/>
Community Chest	<input type="checkbox"/>	<input type="checkbox"/>
O/S Missions	<input type="checkbox"/>	<input type="checkbox"/>
Local Missions	<input type="checkbox"/>	<input type="checkbox"/>

Tick the options to include a Giving Category on the report, and if selected, include a Graph as well.

See also [Setup Roll - Finance - Weekly Project](#) for information on setting up Giving Categories for Weekly Statistics Projects.

Attendance Category

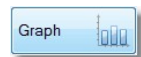
Attendance Category	Analyse	Graph
AM Attendance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
S/S Attendance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Evening Attendance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Home Group 1	<input type="checkbox"/>	<input type="checkbox"/>
Home Group 2	<input type="checkbox"/>	<input type="checkbox"/>
Home Group 3	<input type="checkbox"/>	<input type="checkbox"/>
Baptised	<input type="checkbox"/>	<input type="checkbox"/>
Born Again	<input type="checkbox"/>	<input type="checkbox"/>
Membership	<input type="checkbox"/>	<input type="checkbox"/>

Tick the options to include an Attendance Category on the report, and if selected, include a Graph as well.

See also [Setup Roll - Finance - Weekly Project](#) for information on setting up Attendance Categories for Weekly Statistics Projects.

Graph

Press this option to configure the Graphs for the selected report. If this option is disabled, then you have not yet selected any of the Graph items against each Giving Category or Attendance Category.



Total

A sample Weekly Statistics Total Analysis report is shown below.

Weekly Statistics Monthly Total Report

2010 Calendar Year (Sunday main project)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
AM Offering	\$7084	\$7146	\$7852	\$7284	\$9010	\$5676	\$9340	\$6212	\$7750	\$13676	\$4331	\$9387	\$94748
S/S Offering	\$102	\$85	\$72	\$88	\$100	\$57	\$88	\$71	\$314	\$126	\$48	\$91	\$1243
AM Attendance	1789	1533	1480	1624	1962	1386	1918	1480	1517	2093	1234	1601	19617
S/S Attendance	573	467	474	490	563	368	536	361	450	615	288	420	5605
Evening Attendance	292	373	182	102	185	116	146	116	139	289	68	268	2276
Finance Total	\$7187	\$7231	\$7924	\$7372	\$9110	\$5733	\$9428	\$6283	\$8064	\$13802	\$4380	\$9478	
Attendance Total	2654	2373	2136	2216	2710	1870	2600	1957	2106	2997	1590	2289	

Finance & Attendance totals are calculated by combining the records found for the year. 'Yearly Totals' are calculated by combining all the years' totals to give a total amount. The table values are rounded to the nearest dollar.

Average

A sample Weekly Statistics Average Analysis report is shown below.

Weekly Statistics Monthly Average Report

2010 Calendar Year (Sunday main project)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
AM Offering	\$1417	\$1786	\$1963	\$1821	\$1802	\$1419	\$1868	\$1553	\$1938	\$2735	\$1083	\$2347	\$1822
S/S Offering	\$20	\$21	\$18	\$22	\$20	\$14	\$18	\$18	\$79	\$25	\$12	\$23	\$24
AM Attendance	358	383	370	406	392	346	384	370	379	419	308	400	377
S/S Attendance	115	117	118	122	113	92	107	90	112	123	72	105	108
Evening Attendance	58	93	46	26	37	29	29	29	35	58	17	67	44
Finance Total	\$1437	\$1808	\$1981	\$1843	\$1822	\$1433	\$1886	\$1571	\$2016	\$2760	\$1095	\$2369	
Attendance Total	531	593	534	554	542	467	520	489	527	600	397	572	

Averages for each year are calculated by adding the total amounts together and dividing them by the total amount of records found for the year. The yearly totals are calculated by combining all the records together and dividing them by the total amount of records found for all the years. The table values are rounded to the nearest whole number.

Variance

A sample Weekly Statistics Variance Analysis report is shown below. Variance is described as showing the movement or the difference from one record to the next. Our variance reports show the difference between the average for each month. (Note the first record in a variance report is shown as blank.)

Weekly Statistics Monthly Variance Report

2010 Calendar Year (Sunday main project)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
AM Offering		+\$370	+\$176	-\$142	-\$19	-\$383	+\$449	-\$315	+\$384	+\$798	-\$1652	+\$1264	+\$930
S/S Offering		+\$1	-\$3	+\$4	-\$2	-\$6	+\$3	+\$0	+\$61	-\$53	-\$13	+\$11	+\$2
AM Attendance		+25	-13	+36	-14	-46	+37	-14	+9	+39	-110	+92	+42
S/S Attendance		+2	+2	+4	-10	-21	+15	-17	+22	+10	-51	+33	-10
Evening Attendance		+35	-48	-20	+12	-8	+0	-0	+6	+23	-41	+50	+9
Finance Total		+\$370	+\$173	-\$138	-\$21	-\$389	+\$452	-\$315	+\$445	+\$744	-\$1666	+\$1275	
Attendance Total		+62	-59	+20	-12	-75	+52	-31	+37	+73	-202	+175	

Variance is the growth or decline when comparing the average value found for the month subtracted from the average value of the month before it. The Variance figure gives you the real growth or decline from month to month. The table values are rounded to the nearest whole number.

Yearly Analysis

The Yearly Totals Reports are almost identical to the Monthly Analysis Reports except for 1 main difference. Instead of a month being shown in each column, these reports show a full Year in each column.

Pre Flight

The Pre Flight report options for Weekly Statistics Yearly Reports are shown below.



Click on each part of this screen to learn more.

Yearly Analysis Setup

Weekly Project: Sunday main

Analysis Period: 2008 To 2010

Giving Category	Analyse	Graph
AM Offering	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S/S Offering	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Building Fund	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community Chest	<input type="checkbox"/>	<input type="checkbox"/>
O/S Missions	<input type="checkbox"/>	<input type="checkbox"/>
Local Missions	<input type="checkbox"/>	<input type="checkbox"/>

Attendance Category	Analyse	Graph
AM Attendance	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S/S Attendance	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Evening Attendance	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Home Group 1	<input type="checkbox"/>	<input type="checkbox"/>
Home Group 2	<input type="checkbox"/>	<input type="checkbox"/>
Home Group 3	<input type="checkbox"/>	<input type="checkbox"/>
Baptised	<input type="checkbox"/>	<input type="checkbox"/>
Born Again	<input type="checkbox"/>	<input type="checkbox"/>
Memberships	<input type="checkbox"/>	<input type="checkbox"/>

Help
Graph
Cancel
Continue

Select Project

Weekly Project Sunday main ▼

Select the Weekly Statistics Project that you want to report on. See also [Setup Roll - Finance - Weekly Project](#) for information on setting up the Weekly Statistics projects.

Date Range

Select a Range of Years to include on the Yearly Reports.

Giving Category

Giving Category	Analyse	Graph
AM Offering	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
S/S Offering	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Building Fund	<input type="checkbox"/>	<input type="checkbox"/>
Community Chest	<input type="checkbox"/>	<input type="checkbox"/>
O/S Missions	<input type="checkbox"/>	<input type="checkbox"/>
Local Missions	<input type="checkbox"/>	<input type="checkbox"/>

Tick the options to include a Giving Category on the report, and if selected, include a Graph as well.

See also [Setup Roll - Finance - Weekly Project](#) for information on setting up Giving Categories for Weekly Statistics Projects.

Attendance Category

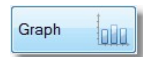
Attendance Category	Analyse	Graph
AM Attendance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
S/S Attendance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Evening Attendance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Home Group 1	<input type="checkbox"/>	<input type="checkbox"/>
Home Group 2	<input type="checkbox"/>	<input type="checkbox"/>
Home Group 3	<input type="checkbox"/>	<input type="checkbox"/>
Baptised	<input type="checkbox"/>	<input type="checkbox"/>
Born Again	<input type="checkbox"/>	<input type="checkbox"/>
Membership	<input type="checkbox"/>	<input type="checkbox"/>

Tick the options to include an Attendance Category on the report, and if selected, include a Graph as well.

See also [Setup Roll - Finance - Weekly Project](#) for information on setting up Attendance Categories for Weekly Statistics Projects.

Graph

Press this option to configure the Graphs for the selected report. If this option is disabled, then you have not yet selected any of the Graph items against each Giving Category or Attendance Category.



Total

A sample Weekly Statistics, Yearly Total Analysis report is shown below.

Weekly Statistics Yearly Total Report						
2008 to 2010 Sunday main project						
	2008	2009	2010			
AM Offering			\$94748			
S/S Offering			\$1243			
Building Fund			\$2352			
AM Attendance			19617			
S/S Attendance			5605			
Evening Attendance			2276			
Finance Total			\$98343			
Attendance Total			27498			

Finance & Attendance totals are calculated by combining the records found for the year. The table values are rounded to the nearest dollar.

Average

A sample Weekly Statistics, Yearly Average Analysis report is shown below.

This report shows for each category an Average for the year. This is calculated by totaling all records in each category, then dividing by the number of records in that year.

Weekly Statistics Yearly Average Report					
2008 to 2010 Sunday main project					
	2008	2009	2010		
AM Offering			\$1822		
S/S Offering			\$24		
Building Fund			\$56		
AM Attendance			377		
S/S Attendance			108		
Evening Attendance			44		
Finance Total			\$1902		
Attendance Total			529		

Averages for each year are calculated by adding the total amounts together and dividing by the number of records. Combining all the records together and dividing them by the total amount of records.

Variance

A Weekly Statistics Yearly Variance Analysis is described as showing the movement or the difference from one record, in this case one year, to the next.

Weekly Statistics Yearly Variance Report					
2009 to 2012 Sunday main project					
	2009	2010	2011	2012	
AM Offering		-\$82118	+\$86118		
S/S Offering		-\$798	+\$5444		
Building Fund		-\$2256	+\$41131		
Community Chest		-\$17739	+\$10528		
O/S Missions		-\$3435	+\$34420		
Local Missions		-\$833	+\$21619		
Finance Total		-\$107179	+\$199260		

Variance is the growth or decline when comparing the average value found for the year growth or decline from year to year. The table values are rounded to the nearest whole

Record Analysis

A Record Analysis report will show the Highest Record, the Lowest Record and the Average Record as well as the totals for each selected attendance and giving category.

Weekly Statistics Records Analysis

2010 Calendar Year (Sunday main project)

	Total	Average	Highest	Lowest
AM Offering	\$94,748.50	\$1,822.09	\$4,250.00	\$702.00
S/S Offering	\$1,242.82	\$23.90	\$252.00	\$10.55
Building Fund	\$2,351.50	\$55.99	\$200.00	\$15.00
AM Attendance	19617	377	536	250
S/S Attendance	5605	108	156	50
Evening Attendance	2276	44	150	9

Averages are calculated by adding the total amounts together and dividing them by the total amount of non-zero records. Lowest values are determined by the lowest non zero amount found.

Raw Data

The Raw Data report shows all information for each record saved in the report date range.

Weekly Statistics Raw Data						
2010 Calendar Year (Sunday main project)						
Date	AM Offering	S/S Offering	Building Fund	AM Attendance	S/S Attendance	Evening Attendance
25/12/2010	\$4,250.00	\$29.50	\$200.00	536	101	150
18/12/2010	\$1,987.00	\$25.50	\$25.00	395	125	68
11/12/2010	\$1,950.00	\$20.50	\$50.00	390	102	25
04/12/2010	\$1,200.00	\$15.25	\$50.00	280	92	25
27/11/2010	\$1,025.00	\$12.30	\$50.00	329	102	26
20/11/2010	\$1,025.00	\$11.25		298	50	15
13/11/2010	\$1,125.00	\$12.65		302	68	15
06/11/2010	\$1,156.00	\$12.30		305	68	12
30/10/2010	\$3,150.00	\$29.50	\$25.00	415	124	60
23/10/2010	\$3,095.00	\$27.50	\$150.00	465	136	79
16/10/2010	\$1,987.00	\$19.25	\$56.00	390	95	68
09/10/2010	\$2,956.00	\$26.55	\$160.00	401	126	59
02/10/2010	\$2,488.00	\$23.35		422	134	23
25/09/2010	\$2,369.00	\$23.25	\$125.00	425	129	9
18/09/2010	\$1,258.00	\$13.25	\$50.00	295	93	69
11/09/2010	\$1,987.00	\$252.00	\$25.00	395	123	25
04/09/2010	\$2,136.00	\$25.60	\$25.00	402	105	36
28/08/2010	\$2,025.00	\$17.30		397	93	23
21/08/2010	\$1,487.00	\$20.50	\$50.00	318	103	26

Notes Attached to records

Use the Notes Attached to records report to view all notes saved against Weekly Records for the selected period.

Rosters

Introduction

In Pastoral Care 9re, we introduced the Roster Program. Except for some cosmetic changes over version 10 and 11, Rosters has not changed at all in functionality. Now with the latest version of Pastoral Care, Rosters (along with the rest of Pastoral Care) has been totally written again from scratch. Rosters is now even easier to use, and comes with more power, more logical screen layouts, and new totally integrated SMS and EMAIL features making the communication of your roster easier and more efficient.

Check out our new [4 Steps to Create a Roster](#) for a great overview of rosters.

New to Rosters?

If you are new to Rosters, please have a full read of the helps / manual to learn how to maximise the use of this great feature. Rosters can schedule any rostering need in your church, and do it with a level of automation that will bring a smile to your face. If you are using a spreadsheet to roster more than 10 people across say 4 tasks, then Rosters can save you time, and remove allot of the headaches that come from people complaining about who they are rostered on with, when they are rostered on, and what you have asked them to do etc.

Existing Roster Users

Although completely re-written, your old roster data can and will be imported along with all of your pre-existing church data when you convert to the latest version of Pastoral Care. So you should be up and going in no time. If you are familiar with an earlier version of Rosters, just have a click around the roster area, and you will soon find all of your old familiar settings and rules areas.

Starting Rosters

Rosters can be found on the Church Tab from the main menu. See also [Setup Rosters](#) area for information on how to configure the Roster feature for your specific needs.

Auto or Manual Build?

The real power of Rosters can be experienced using Auto Build when assigning people to rostered events and duties. Even if you are not 100% happy with the finished build, it's often easier and quicker to auto build, then use the [View/Edit](#) feature to tweak and make any fine tuning changes. If you want to create a roster manually, you can do so without using any of the automated rules and properties, however doing so will remove the advantage of having a program assist you in remembering important issues relating to people on rosters.

See [Auto Build](#) for information on how to auto build a roster.

See [Manual Build Roster](#) for information on how to manually create a roster.

4 Steps to Create a Roster

Apart from [Setting up Rosters](#), there are 4 basic steps to creating a roster. See also [Publishing Your Roster](#) for information on how to distribute your finished roster, and how you can send out SMS and Email reminders.



Click on each image (below) to take to more information on each of those steps.

step 1

Get all of your volunteers who want to do stuff in your church. We call these people Participants.



step 2

Give your Participants something to do, we call the "something to do" a Duty.



step 3

Set any rules up for your Participants. Things like who they like to work with, how often they want to be on etc...



step 4

Create the dates for your rostered event, and build your roster!



Step 1

Managing Participants

A Participant in Pastoral Care Rosters is an individual person who has been assigned a Duty (task / job). Families are not assigned to duties, only individuals are assigned to duties. There are a few insider tricks to managing Participants and these are all outlined in the following topics. (Click on each topic for more information)



- [Using Filters](#)
- [Absence](#)
- [Association](#)

Using Filters

When you are planning out your roster duties, also put some thought into using Status's or Ministries to manage the people that "do stuff" in your church. If your team of volunteers is really small (say 10 - 20 people) you might just want a Status of say "Roster" assigned to each person. So when using the Roster Program, you can use a filter to load in all people with a status of Roster. This is useful for getting all people on the roster loaded at once for looking at.

If you have heaps of people, you might want to have some Status's setup more like a grouping like "Front Of House" for all people involved on the stage, and "Back of House" for all others. You can also simply have a Status or a Ministry for each duty. EG: Piano, Preaching, Worship Leader, Security, Car Park etc. If you use this more detailed method, perhaps consider making a Favorite filter setup by using the filter [Save](#) feature, making loading in a complex set of filters like "Piano + Preacher + Worship Leader + etc" a quicker selection.

Absence

In Pastoral Care Rosters, we do not actually assign people to available dates, we allow you to program ahead non available dates for individuals / families. We call this feature Absence's and the control of Absences can be found on the Participation - Absence button on the toolbar.



Important Note on Absences

An Absence set for one person on one duty, does not automatically make a person not available for another Duty on the same day, or even the same event! Since Pastoral Care has this capability, you can program in any complex absence needs. If someone (or an entire family) is away, use the Copy function in Absences to copy a single absence across multiple people, events and duties.



Click on each part of the Absence control window below to learn more about this feature.

In the sample window below, you can see that for the 9:30 Am Service, Levi Anglin cannot do the Overhead on the first Sunday of each month.

The screenshot shows the 'Roster Absences' window. At the top, there are buttons for 'Close', 'Copy', 'Review', and 'Help'. The 'Event' dropdown is set to '9:30am Traditional'. On the left, there are two lists: 'Duty' and 'Available Duty Members'. Under 'Duty', 'Overhead' is selected. Under 'Available Duty Members', 'Anglin Levi' is selected. On the right, the 'Single Absence' section has an 'Add/View' button. The 'Regular Absence' section has checkboxes for '1st', '2nd', '3rd', '4th', and '5th', with '3rd' checked. Below this, a dropdown is set to 'Sunday' and the text reads 'of Every Month'. The 'Absent Every' section has a dropdown set to 'None' and a 'For' dropdown. Below that, there are checkboxes for days of the week: 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Saturday', and 'Sunday', all of which are unchecked. At the bottom, the 'Starting From' dropdown is set to 'Saturday . 8 December 2012'.

Copy

The Copy (and clear) function allows you to take a single absence for one duty / event and copy it to more than one duty and event. This creates a really fast method of say blocking out a holiday for a family so that no family member will be rostered on during their holiday. To do this, create a manual [Single Absence](#) for one family member for the holiday period. Then use Copy to copy that absence to all family members for all duties.



Click on each part of the Copy window below to learn more.

Roster Copy & Clear Absences ✕

Function Copy Clear People Individual Family

Copy the 9:30am Traditional \ Door Duty absence to the following duties for Allwright Stephen which he\she is a part of

9:30am Traditional \ Music Team

9:30am Traditional \ Offering

11:00am Family \ Car Park

11:00am Family \ Door Duty

11:00am Family \ Worship Leader

7:00pm Evening \ Worship Leader

Help ? Tag All Copy Close

Function

Copy

Function Copy Clear

Select the Copy function mode to set the Copy Absence feature to copy a person's Absence to other duties / events / people

Clear

Select the Clear function mode to set the Copy Absence feature to CLEAR (remove) mode. In this mode you can remove Absences from individuals or other family members.

People

Individual

People Individual Family

Select Individual to only work with the selected person

Family

Select Family to include all family members of the selected individual in your copy / clear processing.

When copying to a family, the following options are given. Your actual options will differ as this is an example from our sample database.

The catch all option here (ie: All family members are away at the same time) is the 2nd option. The first option is to make all family members absent only for the selected event.

Copy absences to all family members on any duty with the 9:30am Traditional roster event
Copy absences to all family members for all events and duties

Extra Duties

This list shows you all the duties and events that the selected individual can be copied to, or cleared from. Each combination is listed allowing you to tick only those items that you want to copy or clear.

Note that above this list in a clear text sentence is the name of the selected person, and the name of the selected duty that you were on when you pressed the Copy button on the Roster Absences window.

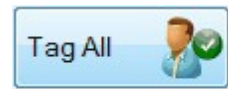
Copy the 9:30am Traditional \ Door Duty absence to the following duties for Allwright Stephen which he\she is a part of

- 9:30am Traditional \ Music Team
- 9:30am Traditional \ Offering
- 11:00am Family \ Car Park
- 11:00am Family \ Door Duty
- 11:00am Family \ Worship Leader
- 7:00pm Evening \ Worship Leader

For example, we have set Stephen as being NOT AVAILABLE for the the 9:30am Door Duty, and if we wanted to be sure that Stephen was not available for anything else that day, we would tick all items in this list and press the Copy Button to complete that selection.

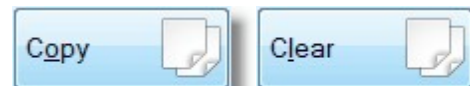
Tag All

Press the Tag All button to tick all duty / event combinations.



Copy/Clear Button

Press the Copy or Clear button to complete the selected action.



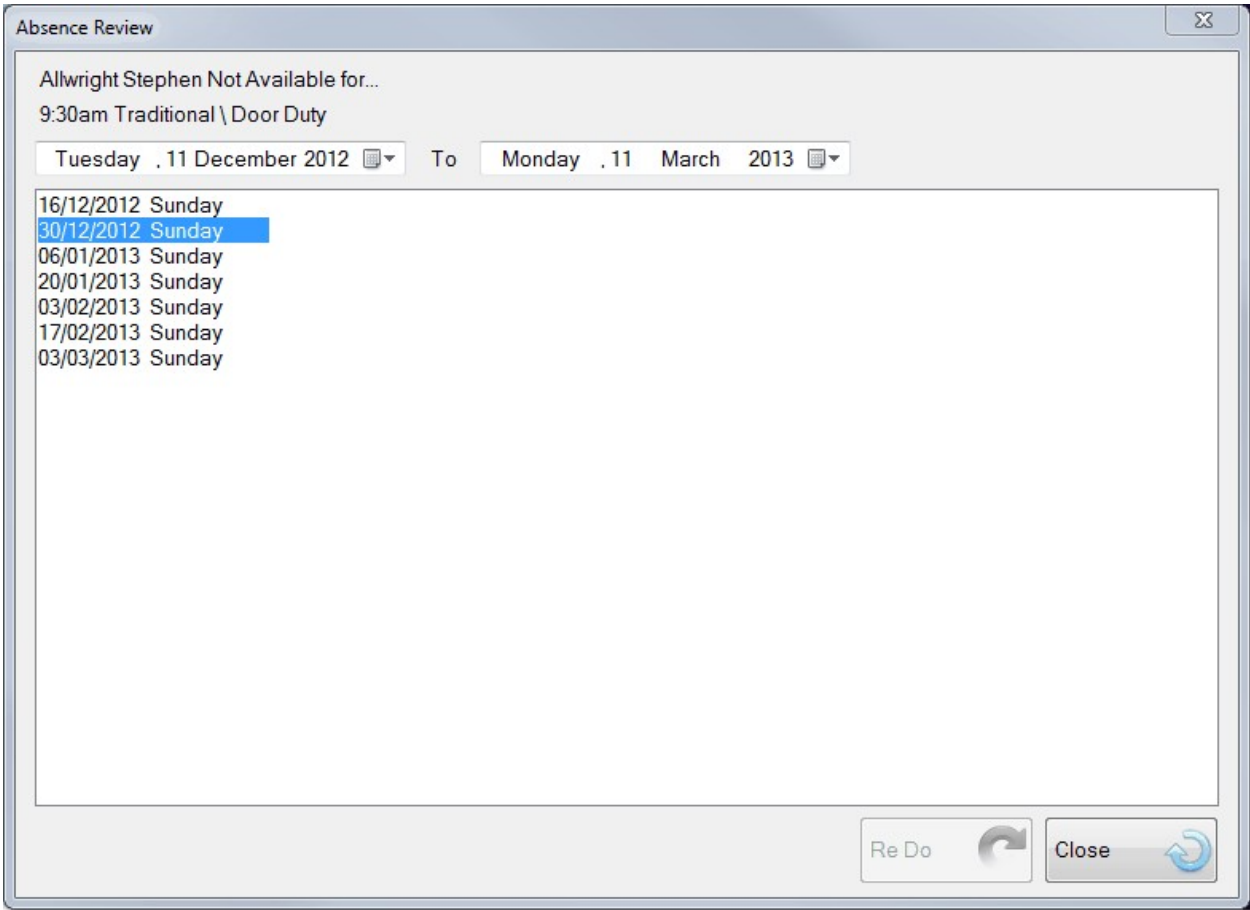
Review



Press the Review Button on the Absence window to check all the dates that have been set as absent for the selected person.

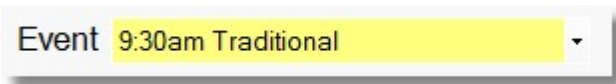
Tuesday . 11 December 2012 To Monday . 11 March 2013

You can use the Date Controls to open up the display so set absences can be viewed over a longer period. If you change the report range, press the Redo Button to refresh the page.



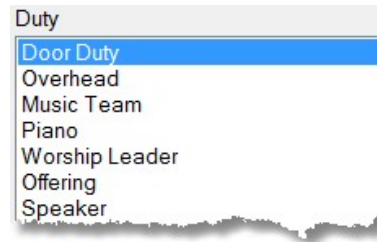
Event

ALWAYS be sure you have selected the correct EVENT when working with Absences. As each Event / Duty Combination is completely unique you may accidentally assign an absence for the wrong event!



Duty

Select the Duty for the selected [Event](#) that you want to assign an Absence for.



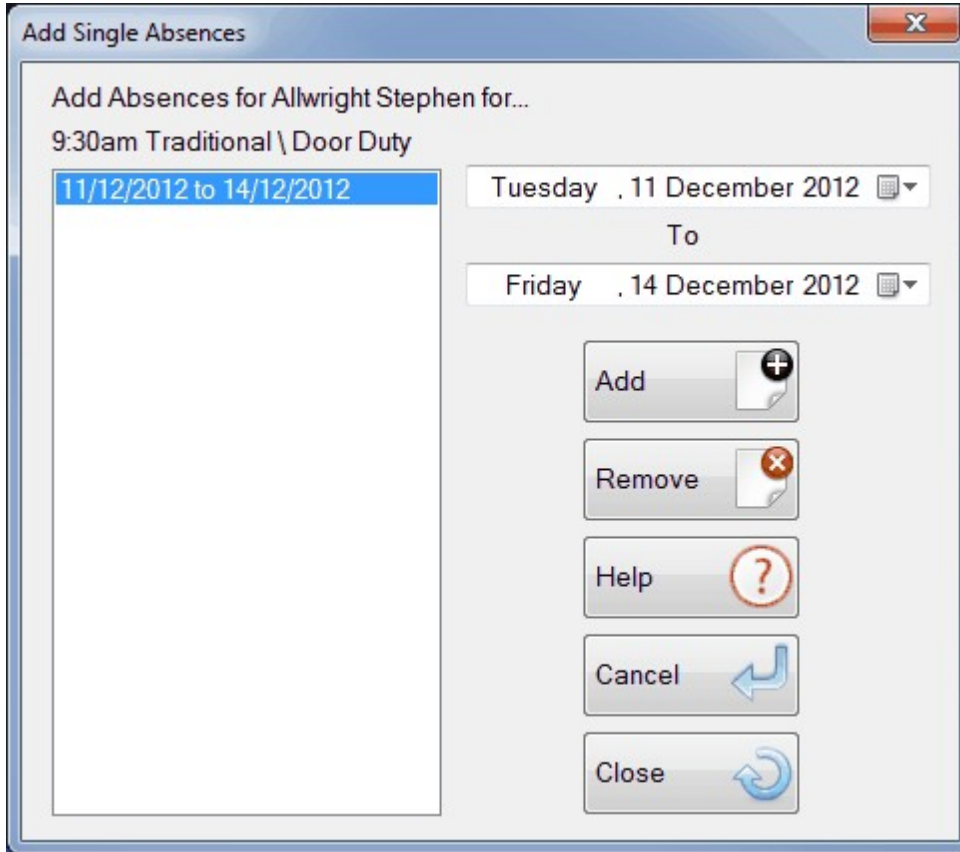
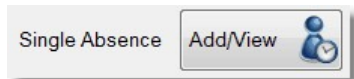
Duty Members

Select a member of the selected Duty to assign an Absence to.



Single Absence

Press the Add/View button in the Single Absence area to view and or set a single Absence Event, of 1 or more days.



You can see the person's name, the Duty and the Event listed at the top of this window. Simply Use the From and To date controls to set a range of dates for that event / duty combination, and press the Add button to complete.

Remove a date

To remove a date, simply select the date from the list here, and press Remove.

Regular Absence

Use the Regular Absence to set a person to always be un-available on a selected day of the week. Simply tick the week number (1,2,3, or 5 or any combination) and select the day of the month.

Regular Absence 1st 2nd 3rd 4th 5th
 of Every Month

Absent Every...

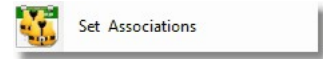
The above example has a programmed absence of every 2nd Sunday starting from the Second Sunday from Tuesday the 11th of December.

That is, starting from the 11/12/12, Pastoral Care looks out 2 weeks (the Absent Every date) then if that day is not a Sunday (the ticked day) Pastoral Care increments 1 day at a time until it finds the first Sunday in it's search. That day is set as absent, then every 2 weeks after that a 1 week (day) absence is recorded for the ticked day, being a Sunday.

Absent Every For
 This person is away on
 Monday Tuesday Wednesday
 Thursday Friday Saturday
 Sunday
 Starting From

Association

Available from the Roster Participants icon on the Roster Toolbar, Associations lets you set really powerful rules for keeping the peace with your Roster. You can use Associations for the following list of ideas. Note, this is not an exhaustive list of ideas!



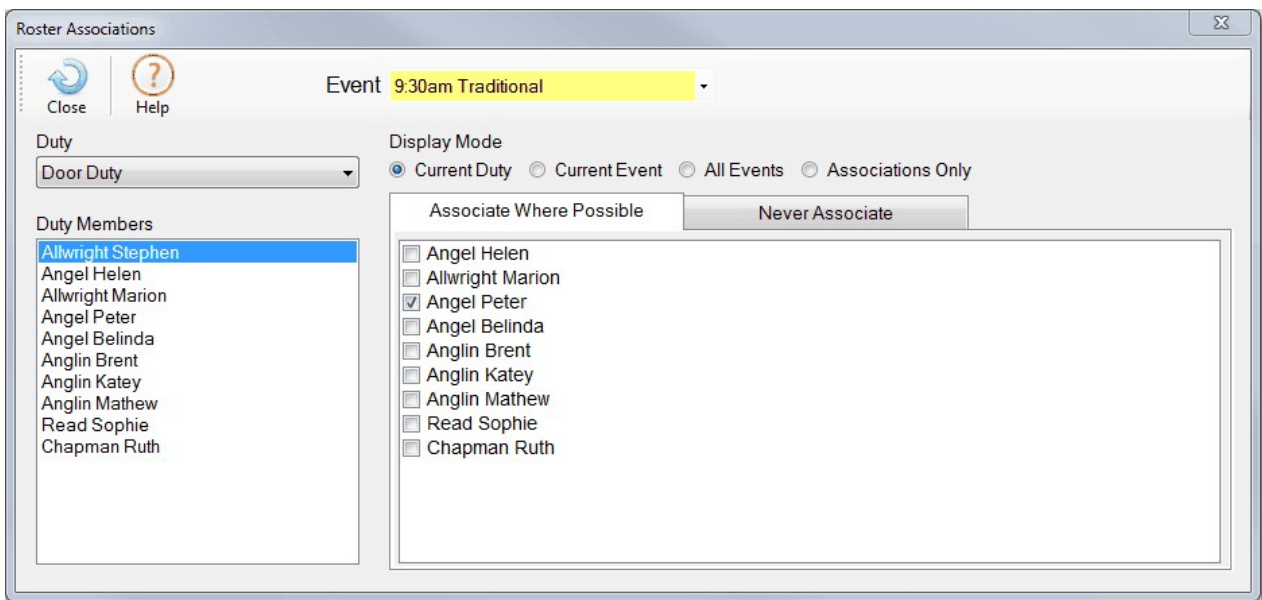
- Roster a couple together
- Don't roster a Mum and Dad on at the same time if they have young children
- Always try and roster John and Joe on kitchen together as Joe always gets a lift to church on Sunday with John.
- Do not roster Peter on Piano with Helen as Praise Leader, they have strong personality clashes, and it's not a good look!
- Always put Karen on with Helen on the singing roster, they are awesome together!

The Association Window.

Roster Associations are simple to set, and Pastoral Care will NEVER forget your associations until you change them!



Click on each part of the Association Window below to learn more about how this feature works.



Event

ALWAYS be sure you have selected the correct EVENT when working with Associate. By default, association only works in the selected event, however there are options to also set associations across events. (See [Display Mode](#))

Event 9:30am Traditional

Duty

Select the Duty that you want to select people from to either Associate or Never Associate them with someone else.

Duty
Door Duty

Display Mode

Display Mode
 Current Duty
 Current Event
 All Events
 Associations Only

Current Duty

Only work with associations within people assigned to the same Duty and Event as the selected person.

Current Event

Set Associations between people on the same event, but across any duty on the roster for that event

All Events

Allow the setup of Association rules between people on any event and any duty.

Associations Only

Set the view to only show the people Associated or Not Associated. All other options will be hidden.

Priority of Association Rules

The Never Associate setting is absolute. Pastoral Care will NEVER assign two people together as per a Never Associate rule when using the Auto Build feature.

The Associate rules are "wherever possible". They cannot be forced as other rules such as Absence can and will get in the way from time to time!

Associate Where Possible

Tick the Person / People that you want to associate with the selected person / duty. Note: the Associate rules are "wherever possible". They cannot be forced as other rules such as Absence can and will get in the way from time to time!

Associate Where Possible	
<input type="checkbox"/>	Angel Helen
<input type="checkbox"/>	Allwright Marion
<input checked="" type="checkbox"/>	Angel Peter
<input type="checkbox"/>	Angel Belinda
<input type="checkbox"/>	Anglin Brent
<input type="checkbox"/>	Anglin Katey
<input type="checkbox"/>	Anglin Mathew
<input type="checkbox"/>	Read Sophie
<input type="checkbox"/>	Chapman Ruth

Never Associate

The Never Associate setting is absolute. Pastoral Care will NEVER assign two people together as per a Never Associate rule when using the Auto Build feature.

Associate Where Possible	Never Associate
<input checked="" type="checkbox"/>	Angel Helen
<input type="checkbox"/>	Allwright Marion
<input type="checkbox"/>	Angel Peter
<input type="checkbox"/>	Angel Belinda
<input type="checkbox"/>	Anglin Brent
<input type="checkbox"/>	Anglin Katey
<input type="checkbox"/>	Anglin Mathew
<input checked="" type="checkbox"/>	Read Sophie
<input type="checkbox"/>	Chapman Ruth

Step 2

Managing Duties

A Duty is a task that has been assigned to a person or a team of people.

Click on each of the following topics for more information.

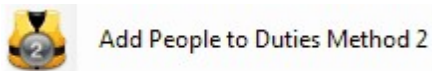
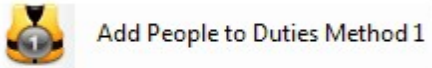
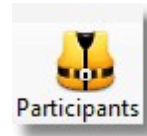
- [Using Filters](#)
- [Adding People to Duties](#)
- [Adding Teams to Duties](#)
- [Absence](#)
- [Association](#)
- [Copy Duties](#)
- [Duty Properties](#)



Adding People to Duties

There are two different methods to add individual participants to a Duty. We simply call them Method 1, and Method 2!

Click on each method below to find out how each method can be used.



Selecting the Participants icon on the Rosters toolbar opens up a range of options. Click on each of the icons shown (right) to jump to each area of interest.

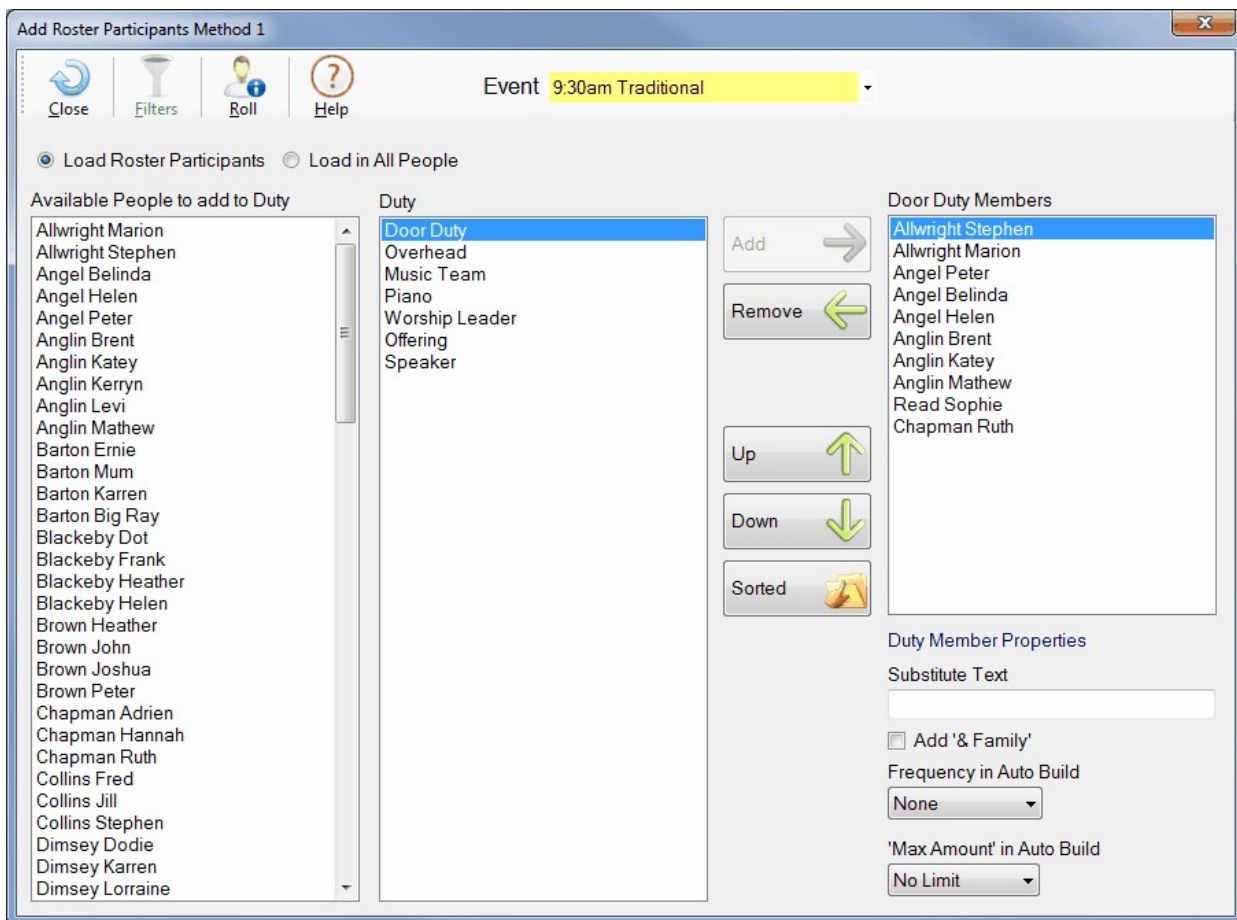


Method 1

Method 1 lets you browse people by either all people or selected groups using filters, and then selecting a Duty and Adding a person to that duty. This method only works with ONE Roster Event at a time. If you want to look across multiple roster events at the same time, have a look at [Method 2](#).



The Add People (Participants) to Duties Method 1 window is shown below. Click on each feature of this window to learn more about how this feature works.



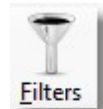
Selected Event

ALWAYS be sure you have selected the correct EVENT when adding people to a Duty. As each Event / Duty Combination is completely unique in the assigned Participants.

Event 9:30am Traditional

Filters

Use any standard Pastoral Care [Filters](#) for selecting specific group(s) of people. Filters is only available when you have selected "Load in All People" from the [Load Options](#) on this window.



Roll

Use this option to check on the attendance of the selected person at a specified Roll Event. (Note, this will only function correctly if you are actually using the [Roll](#) feature of Pastoral Care. See the [Pre Flight](#) options for the Individual Roll report for information on running this report.



Load Options

Load Roster Participants

Choose this option to load in all people currently participating in the roster.

Load Roster Participants Load in All People

Load in All People

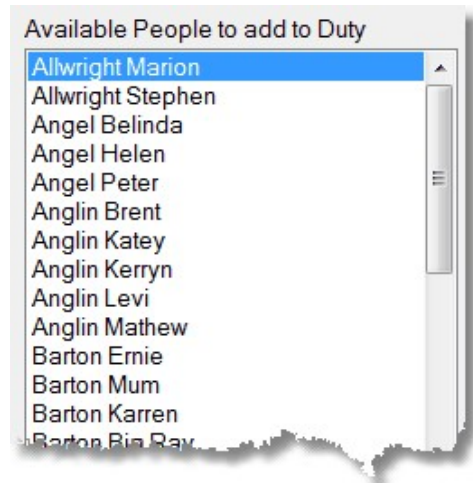
Choose this option to load in all people in your Pastoral Care database, this option also allows you to use FILTERS to restrict your load to a selected group(s). See [Filters](#) for more information.

Available People List

Select a person from the Available People List to add them to a duty.

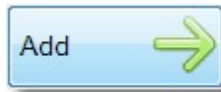
Double clicking on a person's name will add them to the Selected Duty that is currently selected in the [Duty List](#).

Don't forget to always check the [Selected Event](#) before adding or removing people from a roster!



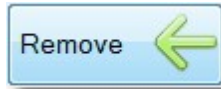
Function Buttons

Shown below are each of the function buttons on the Add people Method 1 form.



Add the currently Selected Person in the [Available People List](#) to the currently selected Duty in the [Duty List](#).

Don't forget to always check the [Selected Event](#) before adding and removing people from a Duty.

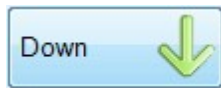


Remove the currently Selected Person in the [Duty List](#) from that duty.

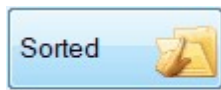
Don't forget to always check the [Selected Event](#) before adding and removing people from a Duty.



Sort the selected person in the Duty List by moving them higher up in the list. This will have the effect of increasing the priority of that person being selected by the roster Auto Build function.



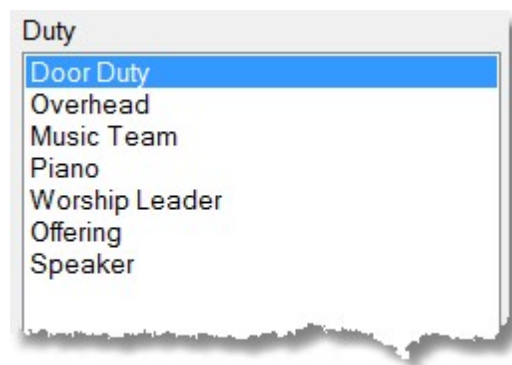
Sort the selected person in the Duty List by moving them lower down in the list. This will have the effect of decreasing the priority of that person being selected by the roster Auto Build function.



Sort the names in the currently displayed Duty List alphabetically.

Duty List

This list is the list of available Duties for the selected Event. If there are other duties that you need to use, and you cannot see them, check the [Setup Rosters](#) area and add any new duties that you may need.



Duty Members

This list is the list of people assigned to a Duty. The name of the selected Duty is shown above the list making this an easily recognised list.

You can use the [Function Buttons](#) next to this list for sorting, adding and removing people from the selected duty.

ALWAYS be sure you have selected the correct EVENT (See [Selected Event](#)) when adding/removing people with a Duty. As each Event / Duty Combination is completely unique in the assigned Participants.



Duty Member Properties

Shown below is the available properties that relate to how an individual Participant is utilised in the currently selected Event/Duty combination. Each of these areas is shown separately to make explaining them easier.

Substitute Text

Enter a Substitute name for the selected person. For example, a person may have a really long name that is making fitting your roster on the report difficult. You could use Substitute Text to enter a nick name for that person.

Add '& Family'

Tick this option to allow Pastoral Care to print out on the rosters "& Family" after a person's name. This allows one person to be rostered on say for Kitchen, but in fact you expect that the entire family helps with that duty.

Frequency in Auto Build

Set the Frequency to force a minimum break in events. EG: Set this to 3, and the selected person will have a minimum break of 3 dates (usually weeks) between events. If you set a frequency of one, this will force Pastoral Care to place that person very high on the priority order and the person may be rostered on every event.

The default setting is None, and this allows Pastoral Care you fit in all people without any programmed in bias.

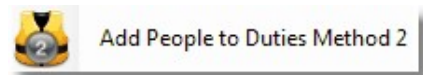
'Max Amount' in Auto Build

Set the Maximum Amount to limit the absolute maximum number of times a person can be rostered on for the selected duty for the entire date range built

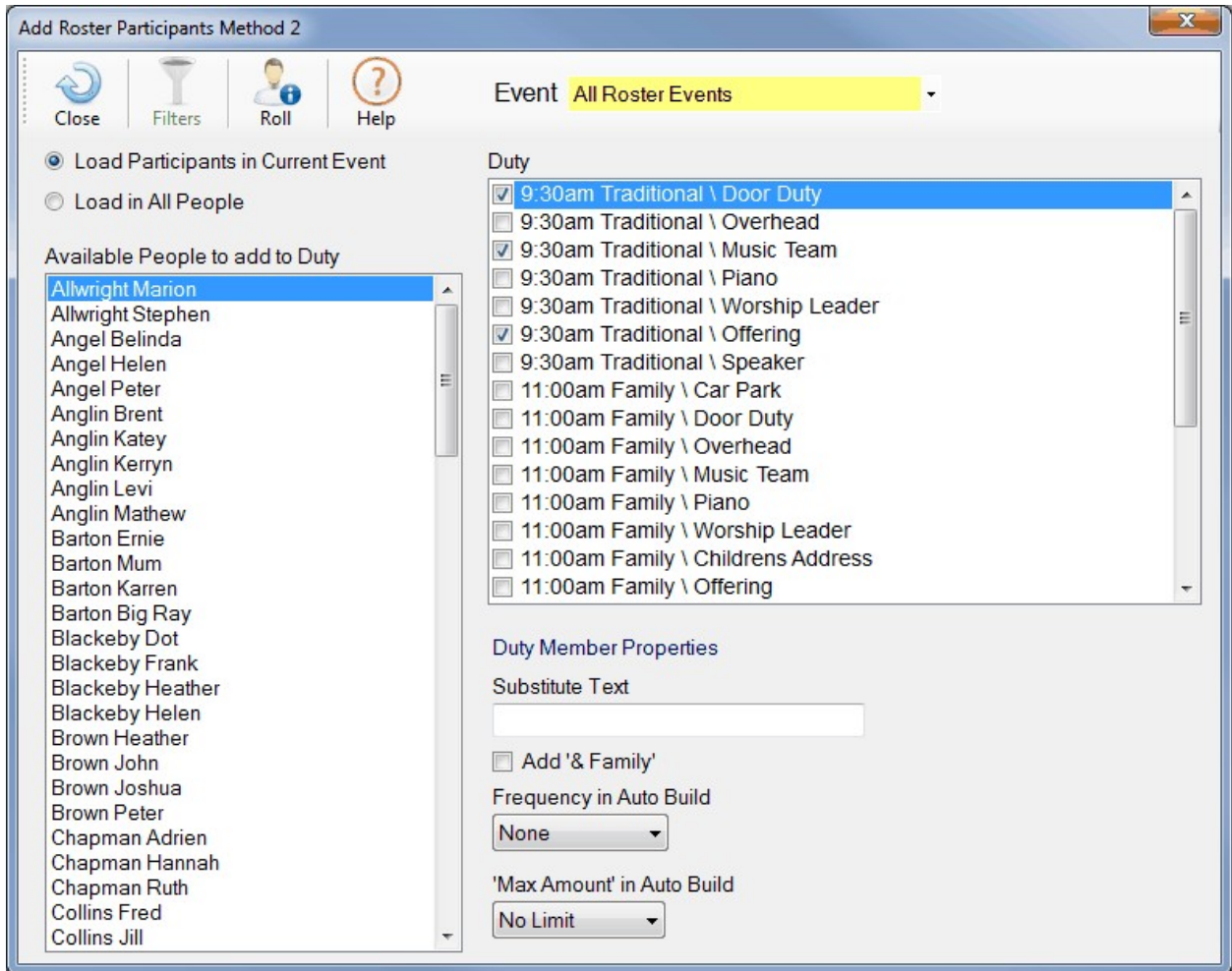
The default setting is None, and this allows Pastoral Care you fit in all people without any programmed in bias.

Method 2

Method 2 lets you browse people by either all people or selected groups using filters, and then selecting a Duty and Adding a person to that duty. You can use Method 2 to handles more than one event at the same time, or to narrow down to just a single event.



The Add People (Participants) to Duties Method 2 window is shown below. Click on each feature of this window to learn more about how this feature works.



Selected Event

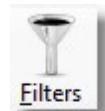
ALWAYS be sure you have selected the correct EVENT when adding people to a Duty. As each Event / Duty Combination is completely unique in the assigned Participants.

Event 9:30am Traditional

Using Method 2, it is also possible to select and All Events option that allows you to work with multiple Events and Duties at the same time.

Filters

Use any standard Pastoral Care [Filters](#) for selecting specific group(s) of people. Filters is only available when you have selected "Load in All People" from the [Load Options](#) on this window.



Roll

Use this option to check on the attendance of the selected person at a specified Roll Event. (Note, this will only function correctly if you are actually using the [Roll](#) feature of Pastoral Care. See the [Pre Flight](#) options for the Individual Roll report for information on running this report.



Load Options

Load Participants in Current Event

Choose this option to load in all people currently participating in the roster in the current event. If ALL EVENTS is selected, then this will load all people in all events / duties.

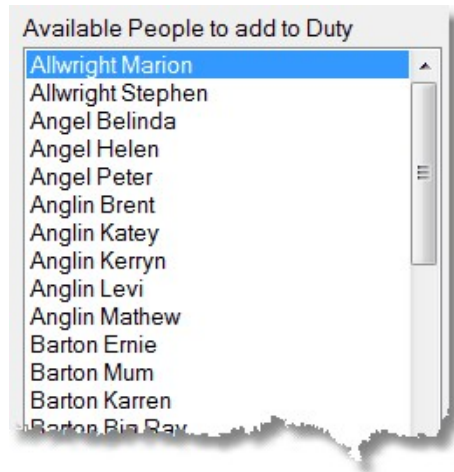
- Load Participants in Current Event
- Load in All People

Load in All People

Choose this option to load in all people in your Pastoral Care database, this option also allows you to use FILTERS to restrict your load to a selected group(s). See [Filters](#) for more information.

Available People List

Select a person from the Available People List to add them to a duty.



Duty List

This list is the list of available Duties for the selected Person. Note that we are showing Multiple Events and Duties here. The Tick identifies which Duty at Which Event the person is participating in.

Simply Tick or Untick duties for a selected person as needed.

If there are other duties that you need to use, and you cannot see them, check the [Setup Rosters](#) area and add any new duties that you may need.

The screenshot shows a window titled "Duty" containing a list of 14 items. Each item consists of a checkbox followed by a time and a duty name. The items are:

- 9:30am Traditional \ Door Duty
- 9:30am Traditional \ Overhead
- 9:30am Traditional \ Music Team
- 9:30am Traditional \ Piano
- 9:30am Traditional \ Worship Leader
- 9:30am Traditional \ Offering
- 9:30am Traditional \ Speaker
- 11:00am Family \ Car Park
- 11:00am Family \ Door Duty
- 11:00am Family \ Overhead
- 11:00am Family \ Music Team
- 11:00am Family \ Piano
- 11:00am Family \ Worship Leader

Duty Member Properties

Shown below is the available properties that relate to how an individual Participant is utilised in the currently selected Event/Duty combination.

Each of these areas is shown separately to make explaining them easier.

Substitute Text

Enter a Substitute name for the selected person. For example, a person may have a really long name that is making fitting your roster on the report difficult. You could use Substitute Text to enter a nick name for that person.

Add '& Family'

Tick this option to allow Pastoral Care to print out on the rosters "& Family" after a person's name. This allows one person to be rostered on say for Kitchen, but in fact you expect that the entire family helps with that duty.

Frequency in Auto Build

Set the Frequency to force a minimum break in events. EG: Set this to 3, and the selected person will have a minimum break of 3 dates (usually weeks) between events. If you set a frequency of one, this will force Pastoral Care to place that person very high on the priority order and the person may be rostered on every event.

The default setting is None, and this allows Pastoral Care you fit in all people without any programmed in bias.

'Max Amount' in Auto Build

Set the Maximum Amount to limit the absolute maximum number of times a person can be rostered on for the selected duty for the entire date range built

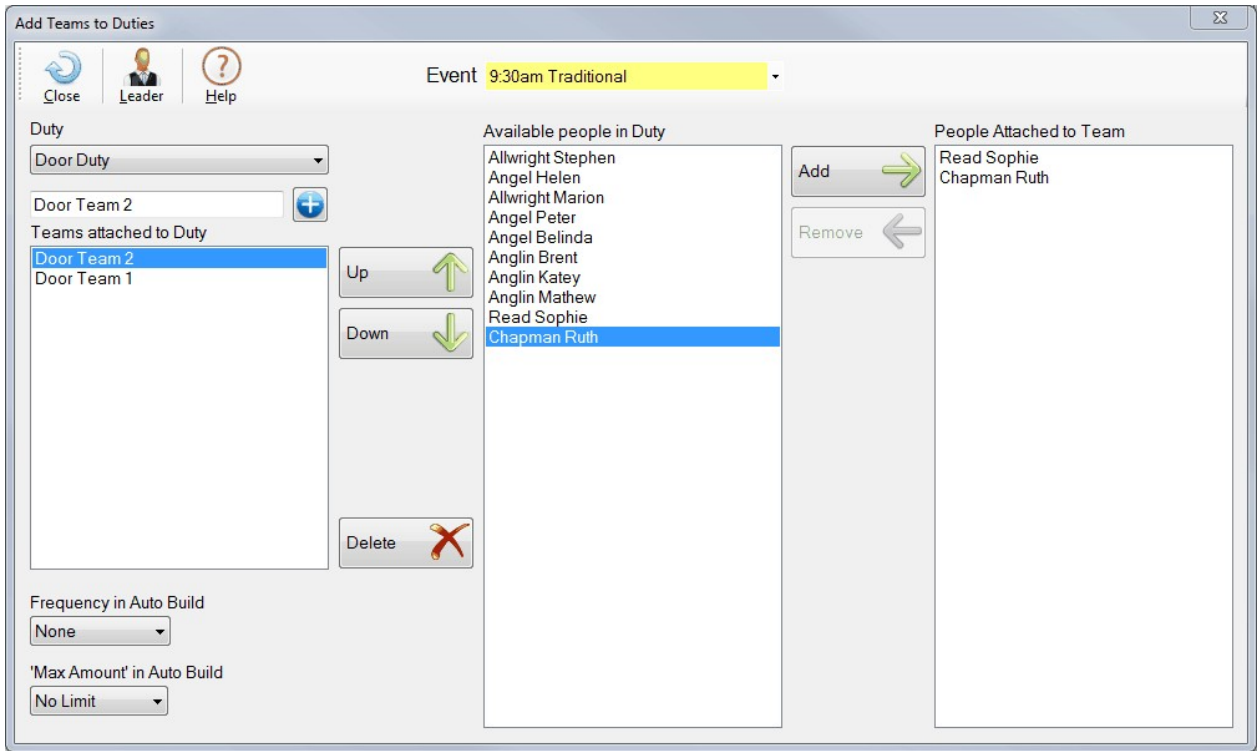
The default setting is None, and this allows Pastoral Care you fit in all people without any programmed in bias.

Adding Teams to Duties

As well as rostering individual participants in a Pastoral Care Roster, you can also assign people to a team, and roster those people as a team. Naturally Pastoral Care also lets you mix and match people to be members of a team or not, and assign both Individuals and Teams as needed without restrictions.

Teams can be useful when one group of people really like to do something together, for example a group of musicians may really hit it off so well together you don't really want to split them up!

The Adding Teams to Duties window is shown below. Click on each area for more information.

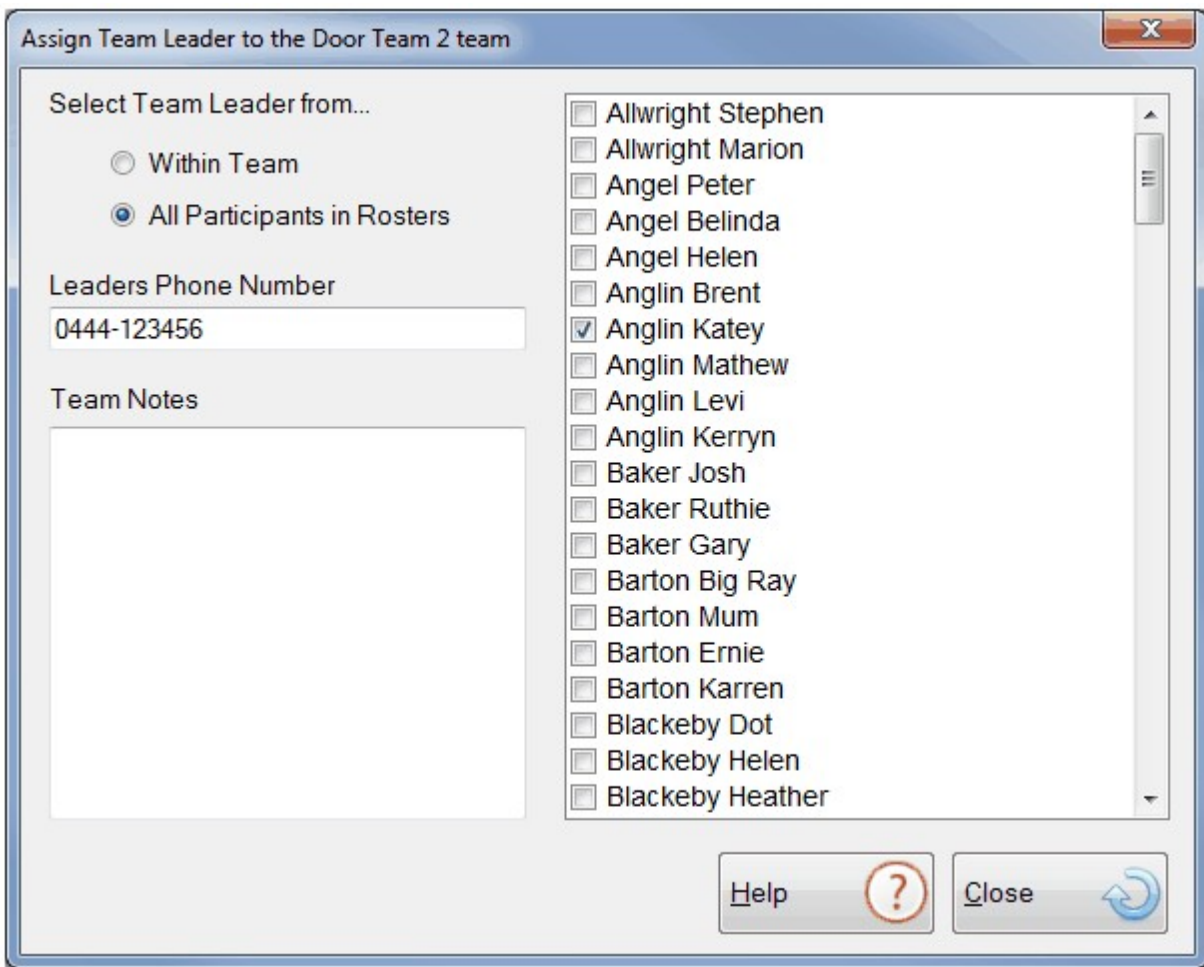


Leader

Pressing Leader will allow you to assign a person as a Team Leader for the currently selected team. The Team Leader management window is shown below.



Click on the different areas of the Leaders window below to learn more...



Select Team Members From

Within Team

Select this option to select a Team Leader only from the people currently assigned to the selected team.

All Participants in Rosters

Select this option to select a Team Leader from any person participating on a Roster.

Leaders Phone Number

Enter a Phone Number for the Leader to be contacted on in case of Roster Changes etc. (This phone number can optionally be displayed on Roster Reports for Team Members to be reminded to call their Team Leader if they have any problems with the roster)

Team Notes

You can use the Team Notes area to record any comments about this team.

Select Team Leader...

Tick the person that you want to be the team leader for the currently selected team.

Event

ALWAYS be sure you have selected the correct EVENT when adding people to a Team. As each Event / Duty Combination is completely unique in the assigned Participants.

Event 9:30am Traditional


Duty

Select a Duty that you want to either Edit an existing team, or to create a new team for.

Duty
Door Duty

Add Team Name

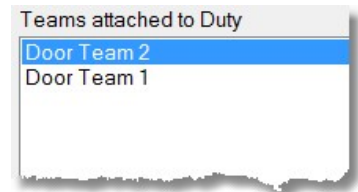
Type in a new Team Name and press Enter on your keyboard, or press the

Blue + () button to add a new team name.

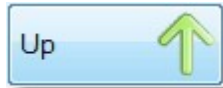
Door Team 2 

Current Teams

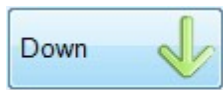
This is the list of current teams you have for the selected Event and Duty. To Edit a team, simply click on a team name here, and add or remove people from the team.



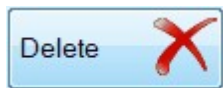
Function Buttons



Move the selected team higher in the list. This has the effect of giving that team a higher priority on selection as a general rule.



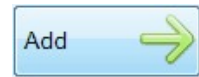
Move the selected team lower in the list. This has the effect of giving that team a lower priority on selection as a general rule.



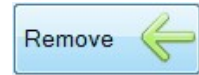
Delete the currently selected team. This will not remove participants from their assigned duties, however it will remove the team from being able to be rostered as a team.

Add / Remove Individuals

To be able to add team members to a team, you must first assign individuals to a duty. This can be done from the [Adding People to Duties](#) area.



Once individuals are assigned to a duty, you can use the Team area to combine people into a duty orientated team. Simply select the team name from the [Current Teams](#) list, select a name from the [Available People](#) list and press the Add Button. To remove a person from a team, simply select the team name from the [Current Teams](#) list, select a name from the [Team Members](#) list and press the Remove Button.



Team Properties

The Team Properties that are available are shown below. These are assigned to each team separately, so that each team can have their own settings in this area.

Frequency in Auto Build

None ▼

Set the Frequency to force a minimum break in events. EG: Set this to 3, and the selected team will have a minimum break of 3 dates (usually weeks) between events. If you set a frequency of one, this will force Pastoral Care to place that team very high on the priority order and the team may be rostered on every event.

The default setting is None, and this allows Pastoral Care you fit in all teams without any programmed in bias.

'Max Amount' in Auto Build

No Limit ▼

Set the Maximum Amount to limit the absolute maximum number of times a team can be rostered on for the selected duty for the entire date range built

The default setting is None, and this allows Pastoral Care you fit in all teams without any programmed in bias.

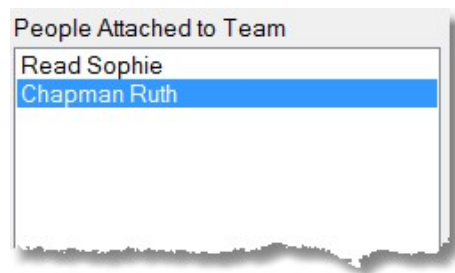
Available People

To be able to add team members to a team, you must first assign individuals to a duty. This can be done from the [Adding People to Duties](#) area. All the available people listed here are simply individuals that have been assigned to the selected duty using the [Adding People to Duties](#) area.



Team Members

This is the list of currently assigned Team Members.



Copy Duties

The Copy Duties feature allows you to copy all people set up on a duty to another duty. This can be useful if you are expanding your duties, or even creating a new service at church and you want to quickly take people rostered on for say door duty at one service, to also be rostered on for the second service. The copy process takes all properties and settings associated with each person, including programmed in Absences. After the copy is completed, you can manually go to each duty and adjust any people in or out of that duty as needed.



Click on each part of the Copy Duties window below to learn more.

Copy Duties
☰

Copy Duties From...

Event

Duty
 Door Duty
 Overhead
 Music Team
 Piano
 Worship Leader
 Offering
 Speaker

Copy Also Absence, Substitute Text, Frequency & Max Amount for Auto Build

Available People for Copying

- Allwright Stephen
- Angel Helen
- Allwright Marion
- Angel Peter
- Angel Belinda
- Anglin Brent
- Anglin Katey
- Anglin Mathew
- Read Sophie
- Chapman Ruth

Available Teams for Copying

- Door Team 2
- Door Team 1

Copy Duties To...

Event

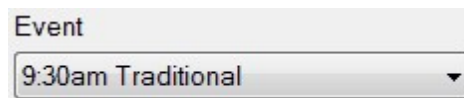
Duty

- Overhead
- Music Team
- Piano
- Worship Leader
- Offering
- Speaker

Help ?
Tag All
Copy
Close

Source Event

Select the event that you want to copy a selected Duty from...

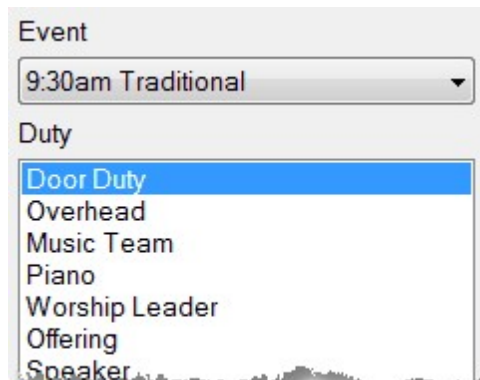


Event
9:30am Traditional

Source Duty

Select the source duty that you want to copy to another duty.

Note, this selection is affected by the selection of the Event.



Event
9:30am Traditional

Duty
Door Duty
Overhead
Music Team
Piano
Worship Leader
Offering
Speaker

Include

Copy Also Absence, Substitute Text, Frequency & Max Amount for Auto Build

We recommend leaving this option ticked. With this option un-ticked only names are copied to the destination duty, with this ticked Absence, Substitute Text, Frequency and Max Amount settings are also copied.

Select People

Tick the individual people that you want to copy across to another duty.

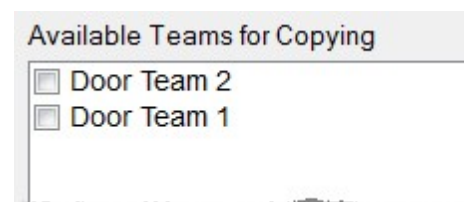


Available People for Copying

- Allwright Stephen
- Angel Helen
- Allwright Marion
- Angel Peter
- Angel Belinda
- Anglin Brent

Select Teams

As well as being able to copy selected individuals, you can copy an entire team across to another duty. All team members and team names / settings are copied as well.

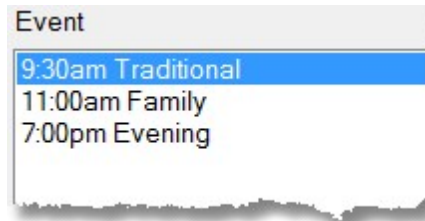


Available Teams for Copying

- Door Team 2
- Door Team 1

Destination Event

Select the destination EVENT that you want to copy the selected people / Duty to.



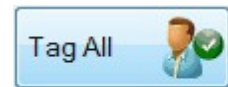
Destination Duty

Select the Destination Duty that you want to copy the selected people to.



Tag All

Press the Tag All button to tag all people in the selected duty. (Click on one person to active this button first)



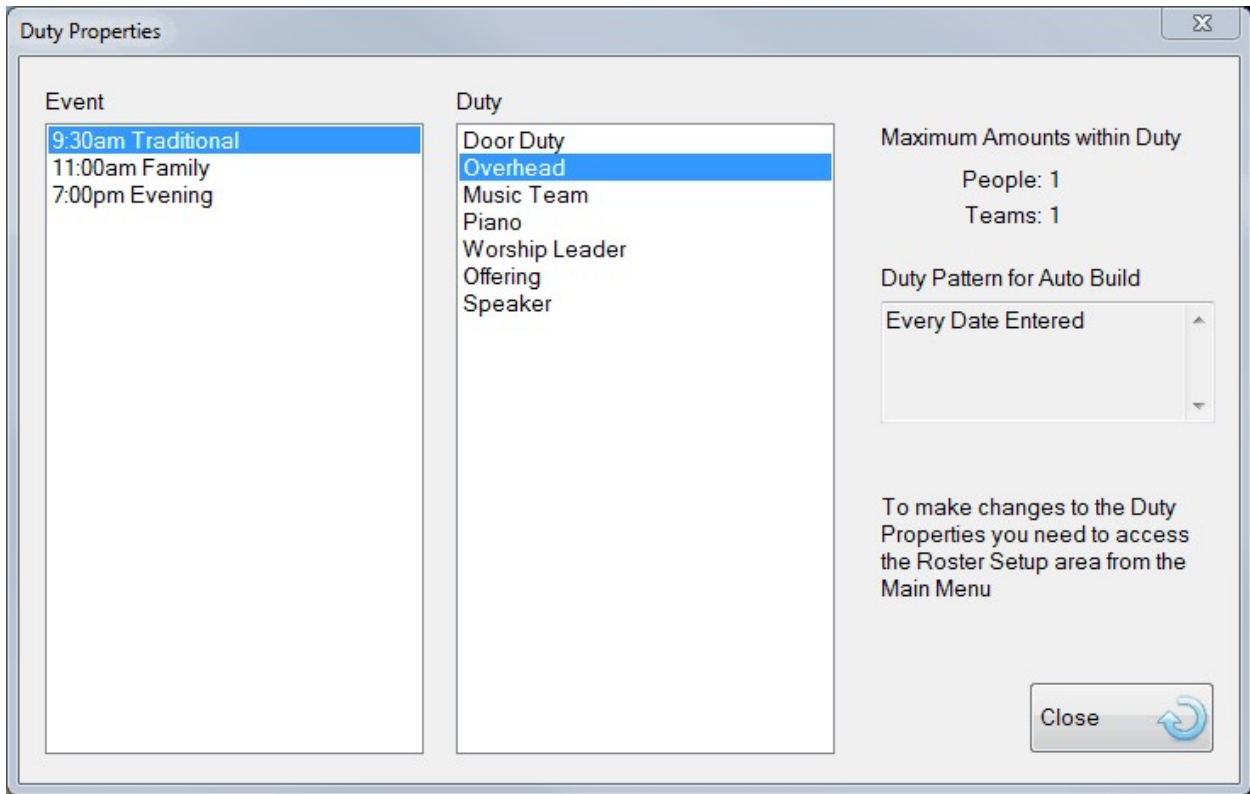
Copy

Press the Copy button to complete the selected Copy Duty function.



Duty Properties

The Duty Properties simply displays the settings for each duty that are configured in the [Setup Rosters](#) area. This allows you to review the settings (not change them) without having to leave the Roster area and go to the [Setup Rosters](#) area.



Step 3

Managing Rules

Rules in the Roster area allow you to automate the requests and preferences of each of your Participants. There are a number of different areas that control what we call a Rule, including an area called Rules.

Click on each area below to learn more about the various methods of automatically controlling preferences and desires for your Participants!

- [Absence](#)
- [Association](#)
- [Rules](#)

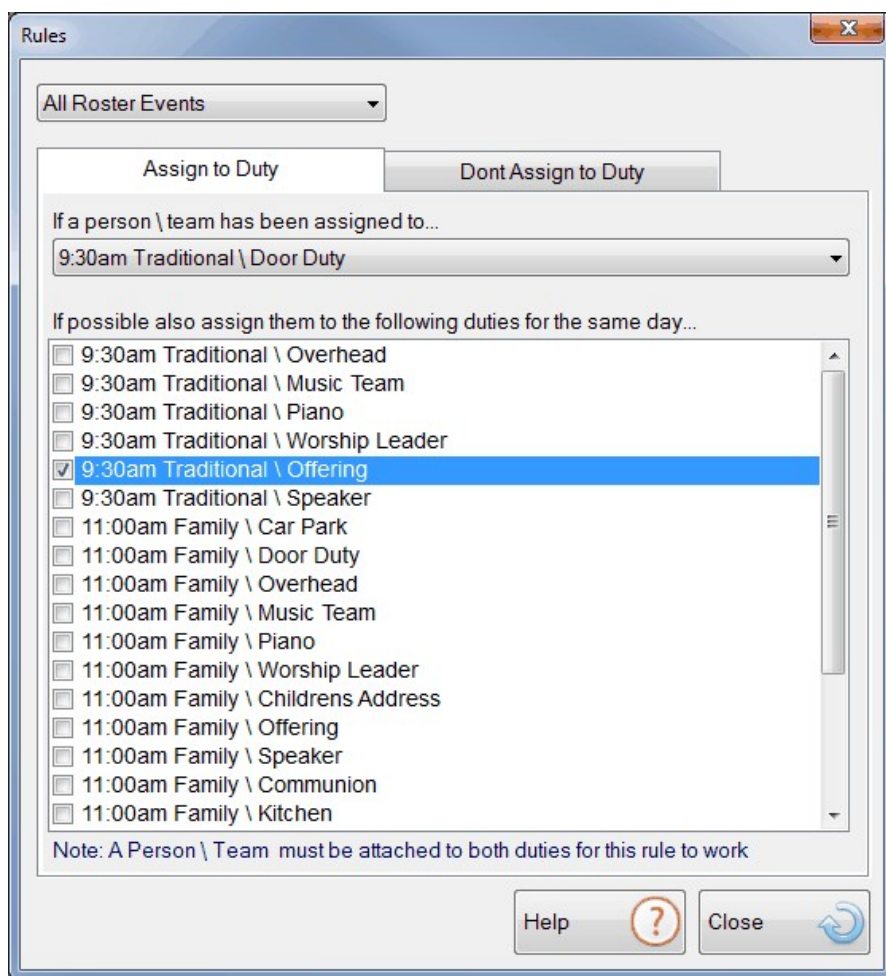


Rules



The Rules icon is available from the Roster Icon on the Roster Toolbar. The Rules area allows you to either assign a person to a duty or not assign them to a duty based on a duty / event assignment. For example, lets say that John is a Piano Player, but also volunteers for the Welcoming Team. You can put in a rule that says if a person is assigned the duty of Pianist, do not roster them on a duty of Welcoming at the same event.

These rules are not Individual Specific, they apply ONLY to Events and Duties.



Note, Naturally, if you trying to set up a situation where if a person is on say Communion Setup, that they also get rostered on for Offering, the people on those duties will need to be in both duties for the rule to work. *A rule will not put a person onto a duty that they are not already assigned to!*

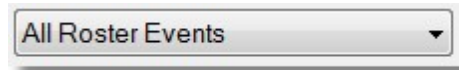


Click on each part of the Rules window **above** to learn more about how the rules can be used to assist in building a roster.

You can see from the example below, a person on the 9:30am Service Door team will most likely be rostered on at the same event for Offering!

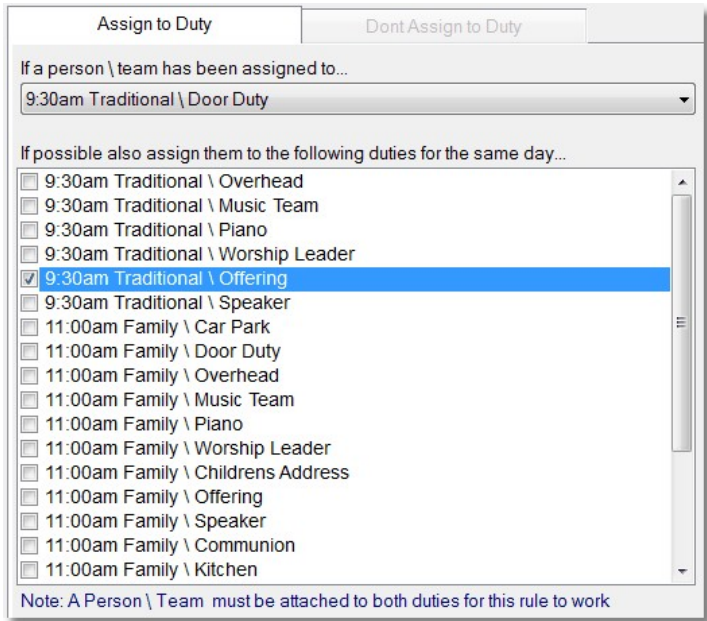
Event Scope

Select the Event that you want to work with, or select All Roster Events to allow selection across all events.



Assign To Duty

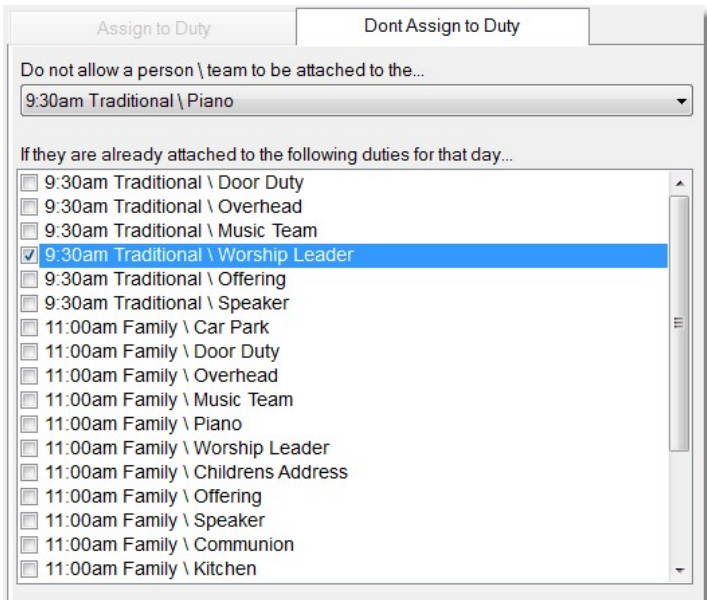
To set up a rule to assign a person to another duty / duties, simply select the main duty that person may be rostered on for at the top of the Assign to Duty area (shown below) and then tick the duties to possibly assign the person to on the same or different events depending on your selection.



Dont Assign to Duty

To set up a rule to assign a person to another duty / duties, simply select the duty that don't want them assigned to at the top of the Don't Assign to Duty area (shown below) and then tick the duties that the person may be rostered on for at the same or different events depending on your selection.

The example below sets a rule to not allow a person to be on Piano at the 9:30am Service if they are rostered on for Worship Leader at the 9:30am Service.

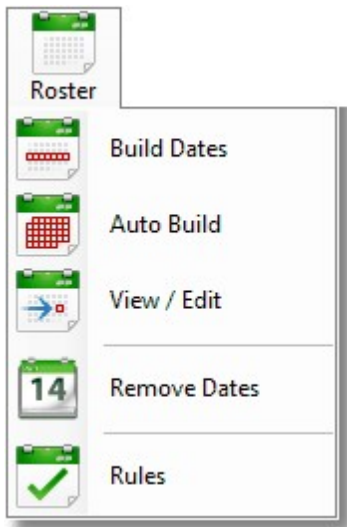


Step 4

Build The Roster

The Roster Icon on the toolbar opens up areas for Setting Dates / Removing Dates, Auto Building your Roster, Viewing and Editing a Roster and some Duty Auto Rules.

Click on each of the following specific areas for full details on Building a Roster.



Build Dates

The very first step to actually building a Roster is to create the dates for each event. Fortunately this process is simple and fast, you do not have to create a date manually for each day/ event.

It is noteworthy to spend a bit of time deciding how long your roster may run for. This is a balance between "This is so easy lets make a whole year" and actually being able to manage a roster for that length of time. In our experience, a 1 month roster is too short, no time for people to plan ahead, and also you are creating a roster every 4 weeks, way to much work. Six months is too long for people to think that far ahead for availabilities etc. We believe in practice, a 3 month roster is ideal.

Therefore, once you have worked out how long to roster for, that is how long you build your dates for!

Dates and Events

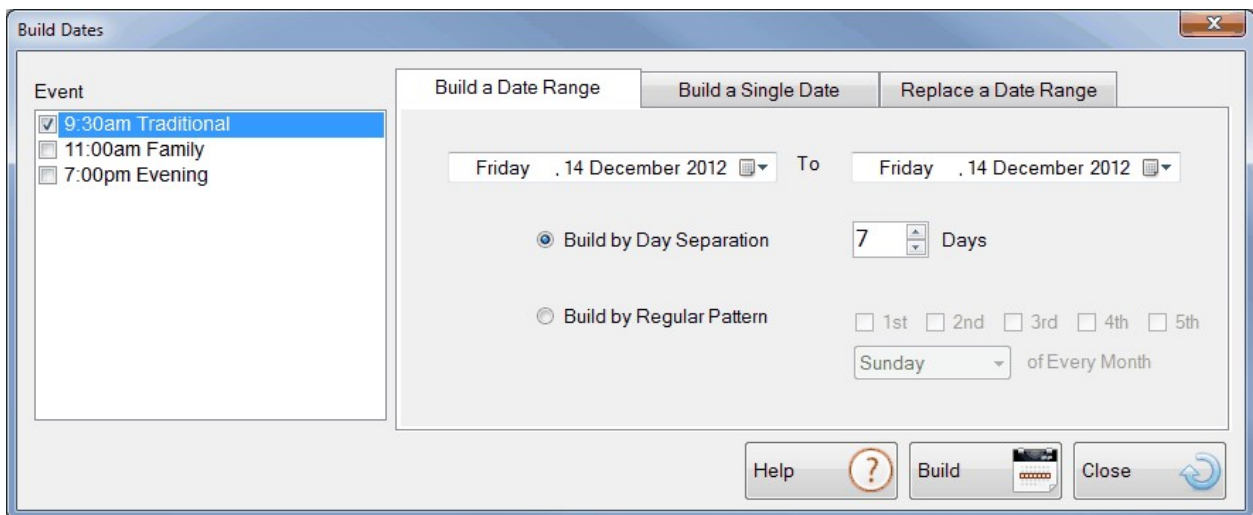
For Each Event that you want to roster, you must build the dates for, as the Build Dates function will not only assign a date for something to happen on, it will assign the something! That something is the Event. So you must assign Dates with Events for every event that will occur in your forward roster period.



Pressing the Build Dates icon that appears under the Roster Icon opens up the following window.

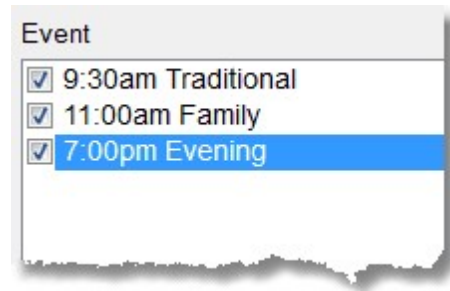


Click on each part of this window to learn how to build dates for your roster.



Select Event

If you are building common dates for multiple events, tick each event here before building. For example, if you run 3 services on all (or most) Sundays, tick them all together and build the dates together. If some of your services have different patterns, like say a youth service on the first Saturday of every month, you can tick just that event and build it's dates separately.



Build a Date Range

Friday . 14 December 2012 To Friday . 14 December 2012

Build by Day Separation
 7 Days

Build by Regular Pattern

 1st
 2nd
 3rd
 4th
 5th

Sunday of Every Month

Build By Day Separation

If you choose a Date Range starting on a Friday, and select Built By Day Separation, and select 7 days, Pastoral Care will start with the first day in the date range (A Friday in this example) and add a date for every 7 Days (more Fridays!) until the end date is reached.

Build by Regular Pattern

The quickest way to build dates for Sunday Services, is to select your event, then select Build By Regular Pattern, tick all days (1st, 2nd, 3rd, 4th, 5th) and select Sunday. Then set your date range for say 3 months, and press the Build button.

Build a Single Date

Use the Build a Single Date to build a date for a special occasional event, like Christmas Day, Good Friday, Resurrection Sunday etc. Even a special service like Resurrection Sunday may have unique rostering events for you, and therefore would be a special Single Date build.



Replace a Date Range

Replacing a date range is a feature that allows you to create a new roster from an existing roster. Let's say that you have created a 6 monthly Roster, it has been fine tuned and adjusted to the point that you are very happy with the build of this roster. You can use the replace a date range feature to Copy A Roster from it's original date period to a new date period, leaving the original roster and date ranges intact.

Note, this is in play ONLY for the [Selected Events](#)

Warning

The Replace a Date Range function cannot be undone. Since this is a potentially destructive process (If you make the wrong settings) you will need to have had a backup before doing this step. See [Backup Data Utility](#) for information on running a backup.

The screenshot shows a dialog box with three tabs: 'Build a Date Range', 'Build a Single Date', and 'Replace a Date Range'. The 'Replace a Date Range' tab is active. It contains the following fields and options:

- Start Build Date:** A dropdown menu showing '04/01/2010'.
- Finish Build Date:** A dropdown menu showing '26/12/2010'.
- Replace with:** A text field showing 'Saturday . 15 December 2012' with a calendar icon.
- Build by Day Separation:** A radio button that is selected, followed by a spinner box showing '7' and the word 'Days'.
- Build by Regular Pattern:** A radio button that is not selected, followed by checkboxes for '1st', '2nd', '3rd', '4th', and '5th'.
- of Every Month:** A dropdown menu showing 'Sunday'.

Steps to Replace a Date Range

1. Choose your events that you want to change a date range for. (See [Selected Events](#))
2. Choose the Start and Finish date of an existing date range in the Replace a Date Range tab (Shown above)
3. Choose the **Start** of the new date range. (Replace with option shown above)
4. Choose the option of either Day Separation or Regular pattern to transfer the remaining dates / events to.

Auto Build

Introduction to Auto Build

Can a computer really build my Roster for me? it's too complicated! People are too fussy for a computer to select things just right!

These are just some of the questions thrown at us when we tell people that Pastoral Care can build their rosters for them! If you are reading this, then you are most likely involved in doing a manual roster now, and you are thinking about using Pastoral Care. Even just for your own sanity, change to using Pastoral Care! After all, you can blame us, or blame the computer when it doesn't work just right! That's alot easier than getting a bit of a dressing down directly from a person who was rostered on when they should have been off!

Did you know that computers do just what they are told to do, and they never forget! So if Jan never wants to be rostered on with Helen, let the computer remember that for you, problem solved! If a person is always away on the 1st and 3rd Sunday of every month, let Pastoral Care remember that for you, problem solved! There is so many situations that the Roster program will help you avoid, it's worth a serious look at.

How it works

Auto Build looks at the following settings, and completes your roster for you...

- Events and Dates
- What Duties are on those Events
- What People are available for those Duties
- Are those people available on those Dates
- A quick review of Preferences for how many times a person should be on a roster, any rules and other settings
- **Roster Done!**

The Auto Build Screen

Shown below is the Auto Build Screen. Auto Build will only function when you have setup your roster, setup your dates and assigned people to duties.

See also:

[Step 1](#) (Managing Participants)

[Step 2](#) (Managing Duties)

[Step 3](#) (Managing Rules)

[Step 4 - \(Build Dates\)](#)



Click on each part of the Auto Build screen to learn more about the options.

Roster Auto Build

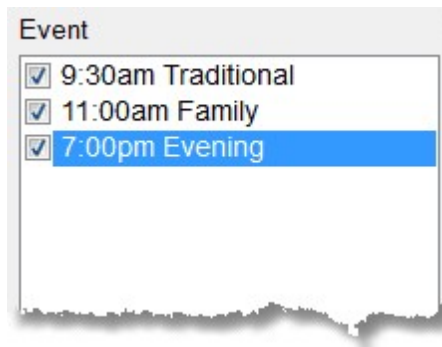
Event	Duty & Order to Build	From	To
<input checked="" type="checkbox"/> 9:30am Traditional	<input checked="" type="checkbox"/> 9:30am Traditional / Door Duty	26/12/2010	26/12/2010
<input checked="" type="checkbox"/> 11:00am Family	<input checked="" type="checkbox"/> 9:30am Traditional / Overhead	19/12/2010	19/12/2010
<input checked="" type="checkbox"/> 7:00pm Evening	<input checked="" type="checkbox"/> 9:30am Traditional / Music Team	12/12/2010	12/12/2010
	<input checked="" type="checkbox"/> 9:30am Traditional / Piano	05/12/2010	05/12/2010
	<input checked="" type="checkbox"/> 9:30am Traditional / Worship Leader	28/11/2010	28/11/2010
	<input checked="" type="checkbox"/> 9:30am Traditional / Offering	21/11/2010	21/11/2010
	<input checked="" type="checkbox"/> 9:30am Traditional / Speaker	14/11/2010	14/11/2010
	<input checked="" type="checkbox"/> 11:00am Family / Car Park	07/11/2010	07/11/2010
	<input checked="" type="checkbox"/> 11:00am Family / Door Duty	31/10/2010	31/10/2010
	<input checked="" type="checkbox"/> 11:00am Family / Overhead	24/10/2010	24/10/2010
	<input checked="" type="checkbox"/> 11:00am Family / Music Team	17/10/2010	17/10/2010
	<input checked="" type="checkbox"/> 11:00am Family / Piano	10/10/2010	10/10/2010
	<input checked="" type="checkbox"/> 11:00am Family / Worship Leader	03/10/2010	03/10/2010
	<input checked="" type="checkbox"/> 11:00am Family / Childrens Address	26/09/2010	26/09/2010
	<input checked="" type="checkbox"/> 11:00am Family / Offering	19/09/2010	19/09/2010
	<input checked="" type="checkbox"/> 11:00am Family / Speaker	12/09/2010	12/09/2010
	<input checked="" type="checkbox"/> 11:00am Family / Communion	05/09/2010	05/09/2010
		29/08/2010	29/08/2010
		22/08/2010	22/08/2010

Build Roster from Scratch
 Fill using Individuals
 Fill Empty Duties Only
 Fill using a Team

Help ? Options ! Build 📅 Close ↻

Build for Event

Tick the events that you want to build at the same time. If you have any rules set that might cross over different events, it is best to select all events that occur on the same day for consideration during the auto build process.



Sort Options

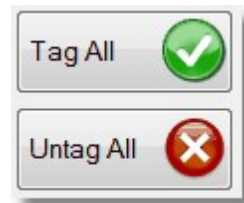
Select a duty from the [Duty Build List](#) and use the Sort options to sort them in the build list.

The build order may be important in assigning key people to key duties first, and leaving more minor duties to be processed last.



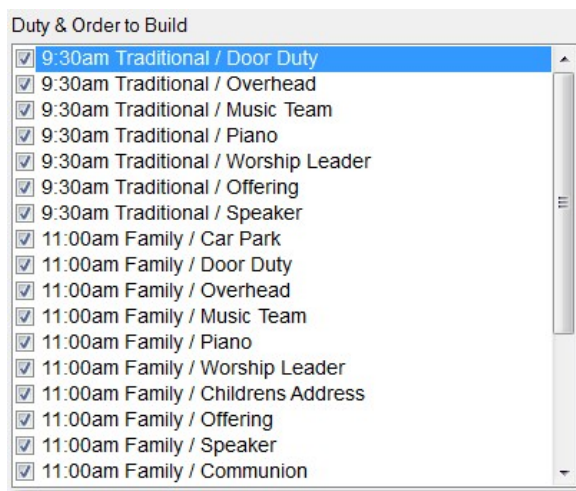
Tag / Untag All

Use the Tag / Untag all buttons to tick all Duties for auto building, or to untick all duties.



Duty Build List

Tick the duties that you want to auto build. In most cases, you will most likely tick all. If you are trying the auto-build feature out for the first time, we encourage you to throw caution to the wind, and tag all for processing!



Date Range

Select the From and To date range that you want to build. The dates listed will be affected by the [Build for Event](#) options ticked.

From	To
26/12/2010	26/12/2010
19/12/2010	19/12/2010
12/12/2010	12/12/2010
05/12/2010	05/12/2010
28/11/2010	28/11/2010
21/11/2010	21/11/2010
14/11/2010	14/11/2010
07/11/2010	07/11/2010
31/10/2010	31/10/2010
24/10/2010	24/10/2010
17/10/2010	17/10/2010
10/10/2010	10/10/2010
03/10/2010	03/10/2010
26/09/2010	26/09/2010

Build Roster from Scratch

Select this option to recreate your roster without consideration for any previous build attempt. All records created within the date range for the selected Events and Duties will be erased.

Build Roster from Scratch

Fill Empty Duties Only

Tick this option to allow Pastoral Care to go over any gaps and try filling them again. This will only be of use if you have changed settings to improve the chances of filling all duties, if you do an auto build from scratch, and you get some gaps, going straight for Fill Empty Duties without making changes to your settings will not make any difference to the gaps!

Fill Empty Duties Only

Fill Using Individuals

Select this option to let Pastoral Care fill all duty assignments based on Individuals. Teams will be ignored in this case.

Fill using Individuals

Fill Using a Team

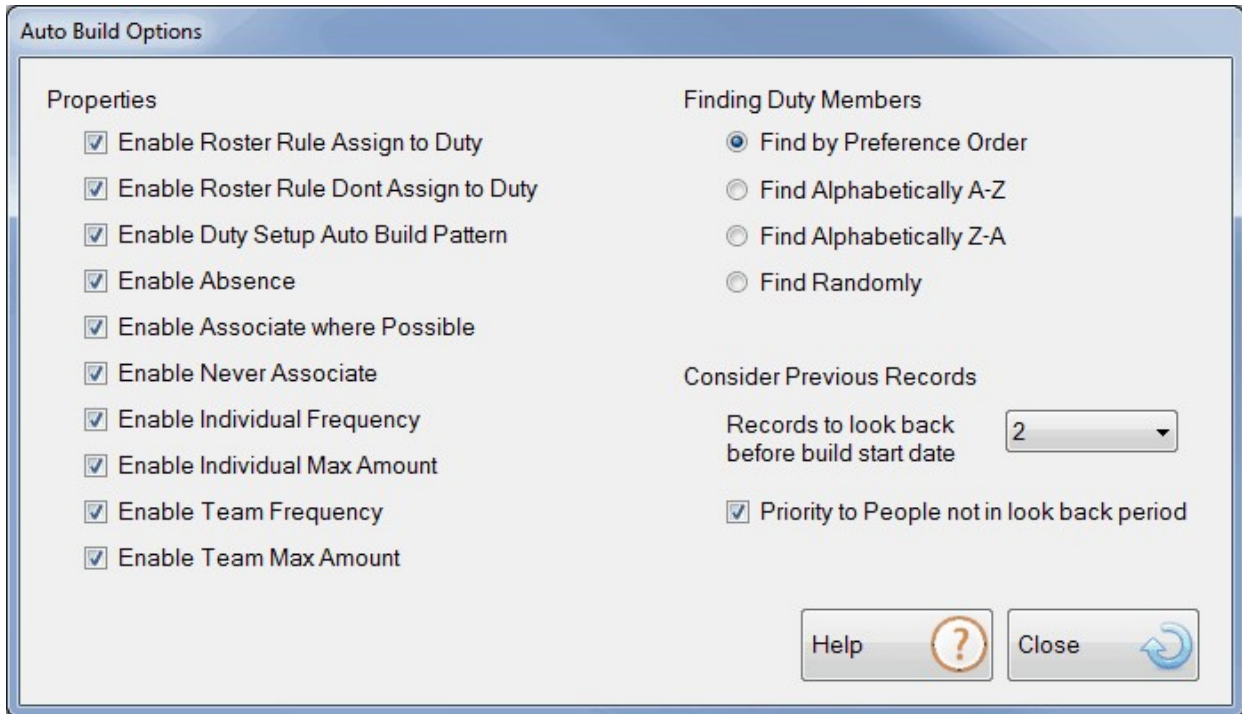
Select this option to let Pastoral Care fill all duty assignments based on Teams. Where teams are not setup, Individuals will be used for duty assignment.

Fill using a Team

Options

Shown below is the Options screen for controlling the Auto Build.

See also [The Auto Build Screen](#)



The screenshot shows a dialog box titled "Auto Build Options". It is divided into two main sections: "Properties" on the left and "Finding Duty Members" on the right. The "Properties" section contains ten checkboxes, all of which are checked. The "Finding Duty Members" section contains three radio buttons, with "Find by Preference Order" selected. Below this is a "Consider Previous Records" section with a dropdown menu set to "2" and a checkbox for "Priority to People not in look back period" which is checked. At the bottom right, there are two buttons: "Help" with a question mark icon and "Close" with a circular arrow icon.

Section	Option	Status
Properties	Enable Roster Rule Assign to Duty	Checked
	Enable Roster Rule Dont Assign to Duty	Checked
	Enable Duty Setup Auto Build Pattern	Checked
	Enable Absence	Checked
	Enable Associate where Possible	Checked
	Enable Never Associate	Checked
	Enable Individual Frequency	Checked
	Enable Individual Max Amount	Checked
	Enable Team Frequency	Checked
	Enable Team Max Amount	Checked
Finding Duty Members	Find by Preference Order	Selected
	Find Alphabetically A-Z	Unselected
	Find Alphabetically Z-A	Unselected
	Find Randomly	Unselected
Consider Previous Records	Records to look back before build start date	2
	Priority to People not in look back period	Checked

Properties

All of the Properties on the left of this window are self explanatory. You either use them (ticked) or not (unticked). We suggest leaving all the Properties ticked on for maximum logic in the building of the Roster.

Finding Duty Members

These options affect the order that people are selected within each duty.

Find By Preference Order Select people in the order that they appear in the Assigned to Duty list. This method allows you to assign your more skilled or desired Participants higher up in the order of selection.

This is the most popular setting, and recommended for allowing you full control over the assignment of people to duties.

Find Alphabetically A-Z Select people based on their Surname sorted A-Z. This gives a slightly higher priority to a person named Adams, and less of a priority to a person named Yusouf

Find Alphabetically Z-A Select people based on their Surname sorted Z-A. This gives a slightly higher priority to a person named Yusouf, and less of a priority to a person named Adams

Find Randomly It is not always the best method to let a computer decide what is random! The priority to people selected will be random, however to the human eye, random is not always fair.

Consider Previous Records

This setting allows Pastoral Care to look back a selected number of records, and put a higher priority to people not in that period to be up front in the next roster.

This allows a roster to feel more considered as you are most likely not going to have a person rostered on say Praise Leader at the end of one roster, and the beginning of another roster period. Avoiding this situation is highly recommended, as this one of those areas that brings the most scrutiny to it'self.

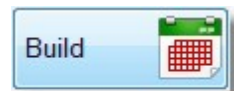
Consider Previous Records

Records to look back before build start date

Priority to People not in look back period

Build

Press the Build button to complete the process, and have Pastoral Care assign people to your roster!



View/Edit

After building a Roster by using either the [Auto Build](#) feature or the [Manual Build Roster](#) feature, you should always use the View/Edit feature to review the roster. View/Edit puts your roster in an active grid (like a spreadsheet) that helps you to identify at a glance any issues that may have been created.



The View/Edit feature is available from the Roster Icon on the Roster Toolbar.



Click on each part of the View/Edit window shown below to learn more about this feature. This window is shown *with* a roster loaded as a demonstration of what it looks like.

Roster View
Close Load Options Duplicates Filters Help

Event

- 9:30am Traditional
- 11:00am Family
- 7:00pm Evening

From

- 26/12/2010
- 19/12/2010
- 12/12/2010
- 05/12/2010
- 28/11/2010

To

- 26/12/2010
- 19/12/2010
- 12/12/2010
- 05/12/2010
- 28/11/2010

Allow Substitute Text Use Team Names

Name to Highlight

Current Cell...
05/12/2010 \ 9:30am Traditional \ Car Park

Date \ Event	Car Park	Door Duty	Overhead	Music Team	Piano	Worship Leader	Childrens Address	Offering	Speaker	Con
05/12/2010 9:30am Traditional		Katey Anglin Mathew Anglin	Levi Anglin	Joshua Brown Adrien Chapman Wendy Potter	Peter Gray	Leanne Leah		Marion Allwright Stephen Allwright	Michael Read	
05/12/2010 11:00am Family	Katey Anglin Levi Anglin	John Flemming Helen Edwards Edith Eadon	Steve Kean	Anna Read Alison Read Peter Morton Sophie Read	Alison Read	Peter Angel	Jill Collins	Lorraine Dimsey Sarah Dimsey Dodie Dimsey	Christine Morton	John
12/12/2010 9:30am Traditional		Sophie Read Ruth Chapman	Kerryn Anglin	Karren Potter Anna Read Andrew Read	Darryn Harris	Kerry Lynch		Peter Angel Marcus Read	Karren Potter	
12/12/2010 11:00am Family	Kerryn Anglin Mum Barton	Ruby Dobber Hugo Dobber Jack Eadon	Ryan Jones	Milton Potter Bruce Oliver Esther Nixon Christine Morton	Andrew Read	Stephen Allwright	Stephen Collins	Mandy Dimsey Nathan Kean Jannet Kean	Paula Morton	
19/12/2010 9:30am Traditional		Stephen Allwright Marion Allwright	Big Ray Barton	Heather Blackeby Peter Morton Sophie Read	Annita Harris	Christopher Lynch		Andrew Read Sophie Read	Wendy Potter	
19/12/2010 11:00am Family	Big Ray Barton Ernie Barton	Charlie Jones Wendy Jones Lauren Jones	Lauren Jones	Paula Morton Nathan Potter Karren Potter Greg Taylor	Alison Read	Belinda Angel	Richard Dimsey	Mike Knight Sue Knight Jenny Kean	Peter Morton	

Toolbar

Click on each Toolbar Icon below to learn more about the View/Edit toolbar.



Load



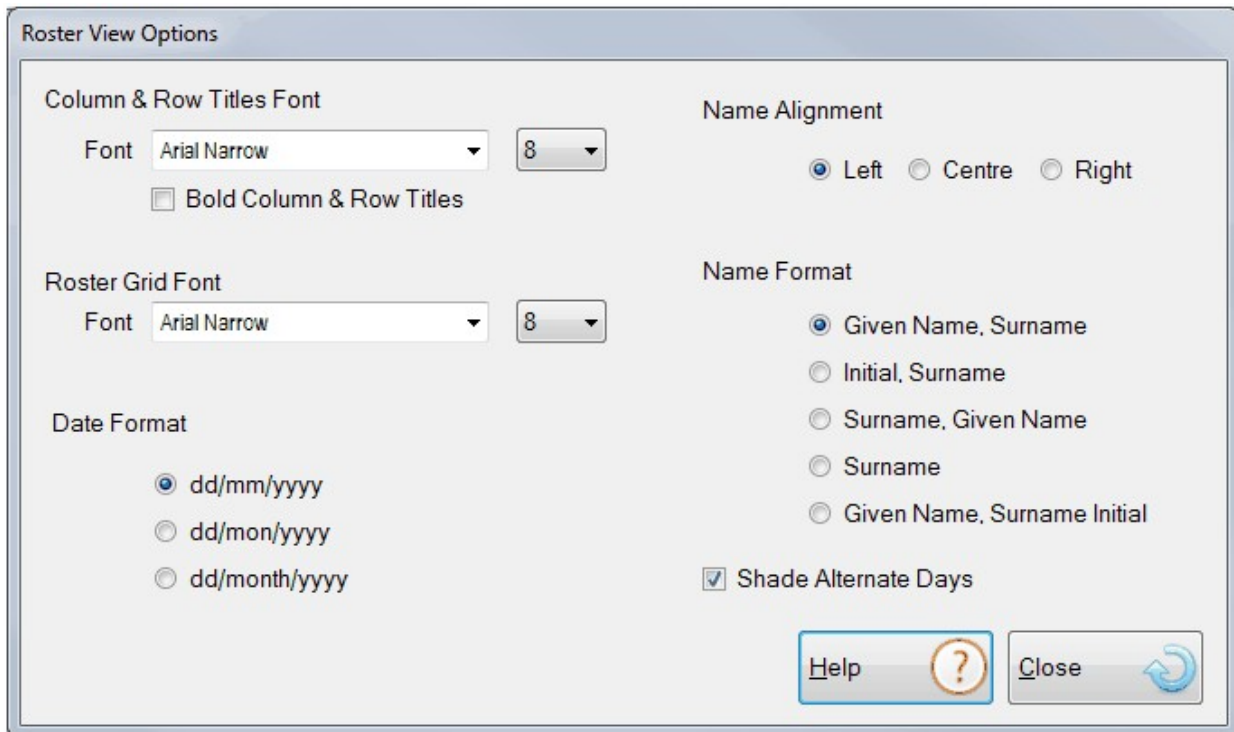
Press the Load Button to load the View/Edit grid with all the selected Events and Duties between the selected Date Range.

Options

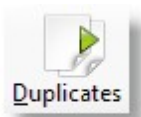


The following options relates only to the display of the roster in the View/Edit grid.

Simply select the desired font and other settings to make your on screen roster easier to read.



Duplicates



Pressing the Duplicated button will allow you to cycle through events highlighting where a person is doing 2 different tasks at the same event. This tool is useful in helping you avoid conflicting a person with more than one duty at the same time! If you use the [Rules](#) area correctly, you should be able to completely avoid a duplication.

Best Practice for handling duplications is to use this feature to locate them and manually fix them then and there. However, you must go to the [Rules](#) area after manually adjusting your roster and set a rule to avoid that duplication for good.

Continue to press the Duplicates Button to move through each warning.

Julian Read Marcus Read	Ruth Chapman	Peter Morton Paula Morton Greg Nixon	Neil
Stephen Allwright Marion Allwright	Ernie Barton	Levi Anglin Marion Allwright Stephen Allwright	Nathan Potter
Julie Flemming Flemming	Charlie Jones	Anna Read Alison Read	

Filters



As well as loading in every person on the roster, you can also use [Filters](#) to restrict the load to a select group of people.

Load Event

Tick the events that you want to load into the View / Edit roster grid.

Event

9:30am Traditional

11:00am Family

7:00pm Evening

Load Dates

Select the From and To date range to load in Roster Grid from.

From	To
01/02/2010	26/12/2010
25/01/2010	19/12/2010
18/01/2010	12/12/2010
11/01/2010	05/12/2010
04/01/2010	28/11/2010

Allow Substitute Text

Allow Substitute Text

Tick this to allow the display of Substitute Text that been setup against individuals.

Use Team Names

Use Team Names

Tick this option to allow the display of Team Names where a team has been assigned to a Duty / Event.

Highlight Name

Name to Highlight

Blackeby Dot

Select a name to highlight in the grid. This can be useful to assist you in drilling down to how often and when a single person is rostered on.

Current Cell Information

Current Cell...

21/11/2010 \ 9:30am Traditional \ Overhead

This area shows the Date, Event and Duty that you have clicked on in the View / Edit grid.

Duty Titles

Car Park Door Duty Overhead Music Team Piano

The Title Row of the grid displays each Duty in the selected roster.

Event Titles

Date \ Event
31/10/2010 7:00pm Evening
07/11/2010 9:30am Traditional
07/11/2010 11:00am Family

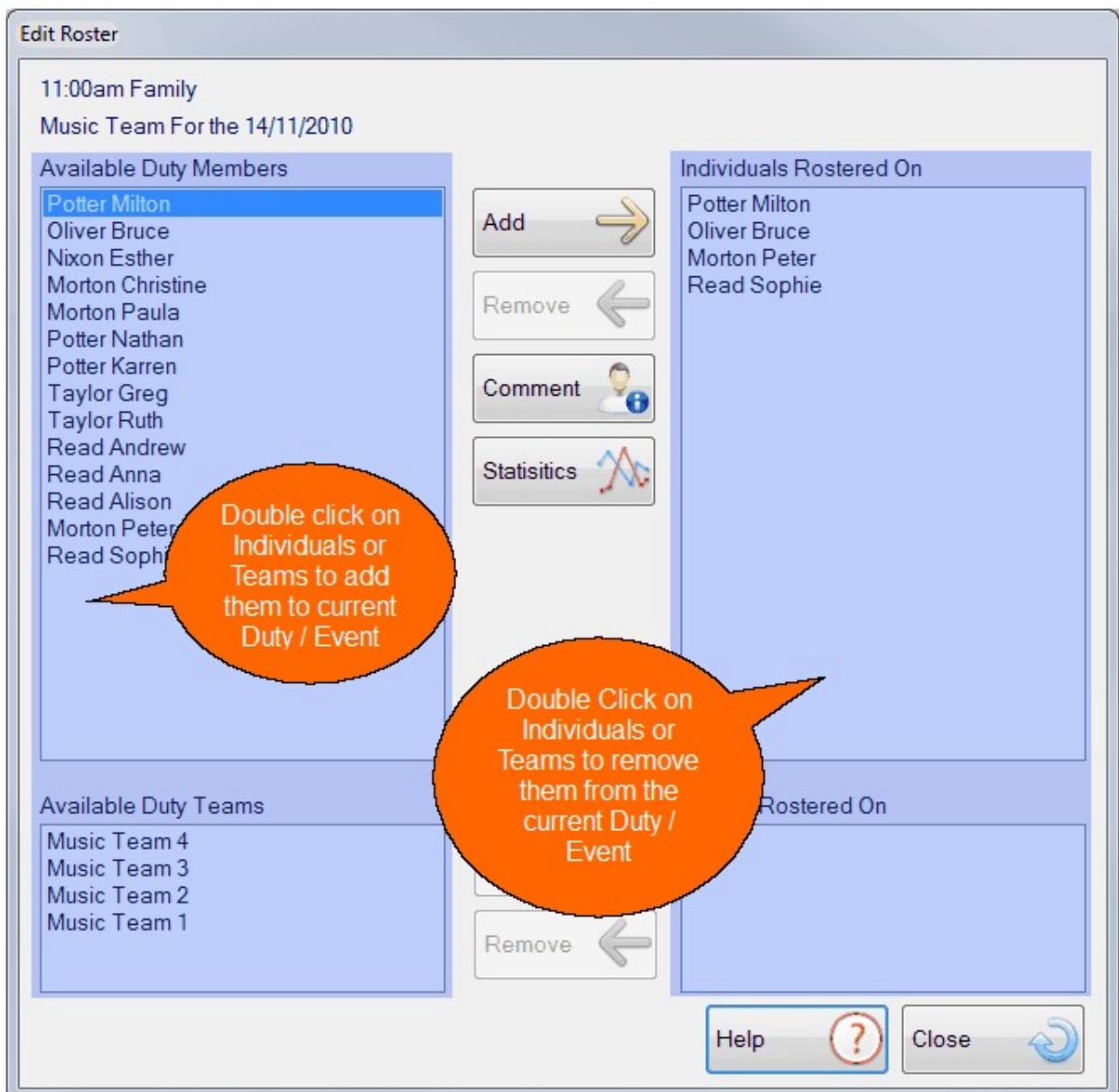
The First Column in the View / Edit Roster grid shows you the Date and Event name of each event loaded with the current options.

Edit a Cell

Editing a Cell in the View/Edit roster grid is as simple as a Double Click on the cell that you want to change. When you have double clicked on a Cell, you get a window that looks like the sample one shown below.



Click on each part of this window to learn more about editing a Roster Grid cell.



Add / Remove

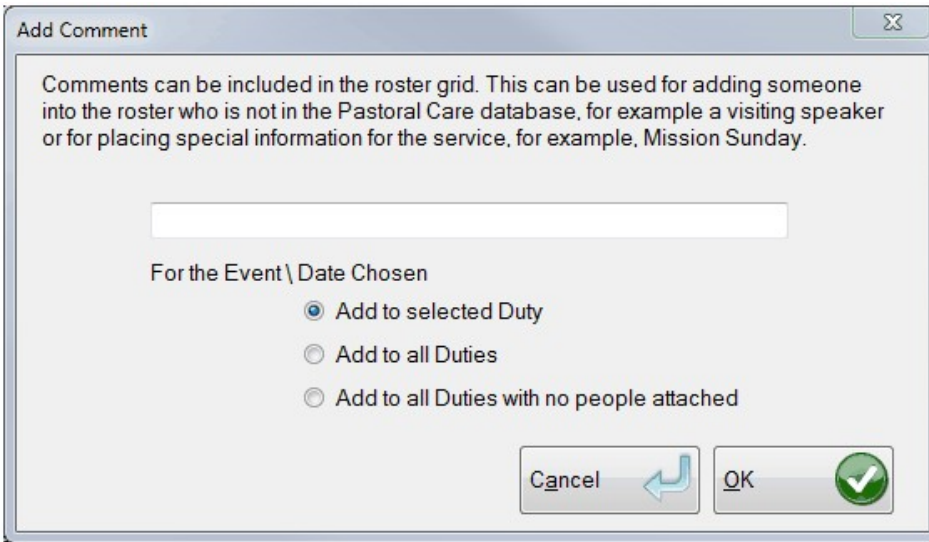
To add people to the current Event / Duty, either select their name, or a team name and press the corresponding Add button. To remove people from the current Event / Duty, either select their name, or a team name and press the corresponding Remove button.

You can also double click on a name or a team to move it. The person or team you double click will be moved to the

opposite state, ie: From Participating to Not Participating or Visa-Versa!

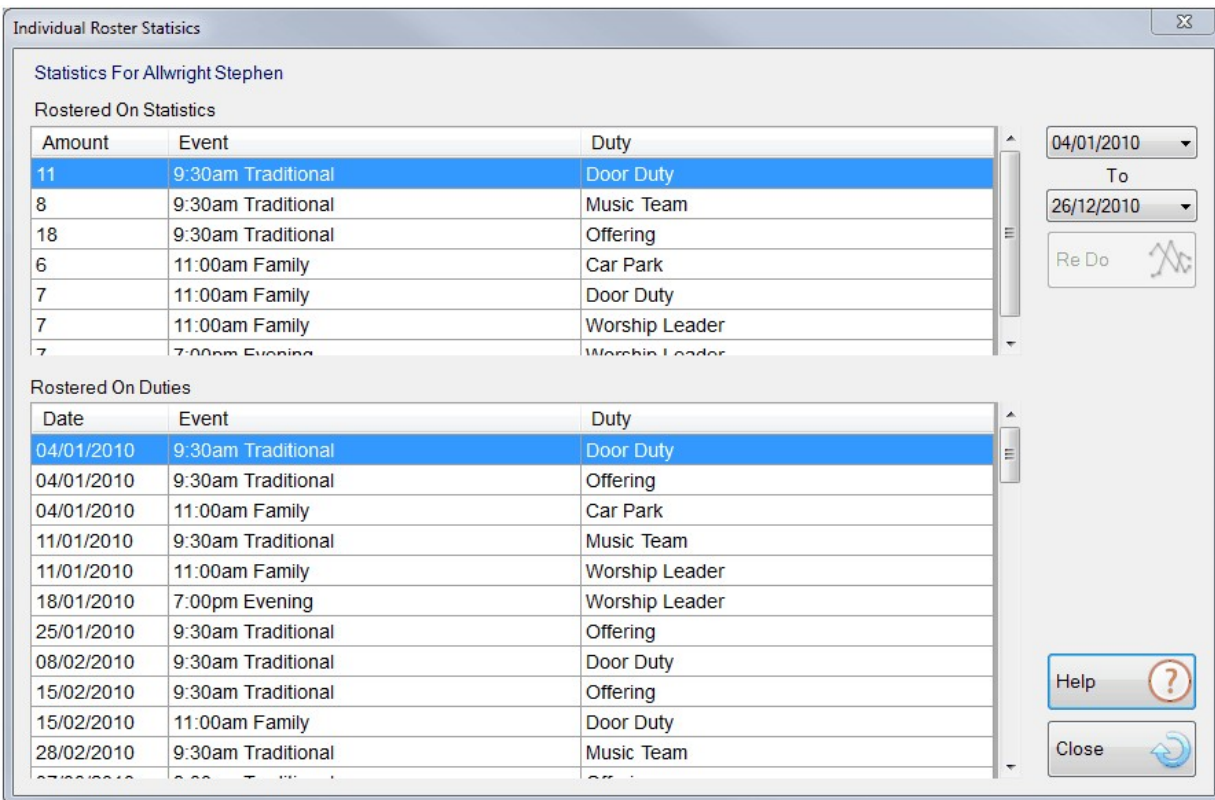
Comments

You can easily add a comment to cell, or a range of Cells. The following control window opens up with you press Comment from the Edit Cell window. Simply enter a comment, and select one of the 3 scope options and press OK.



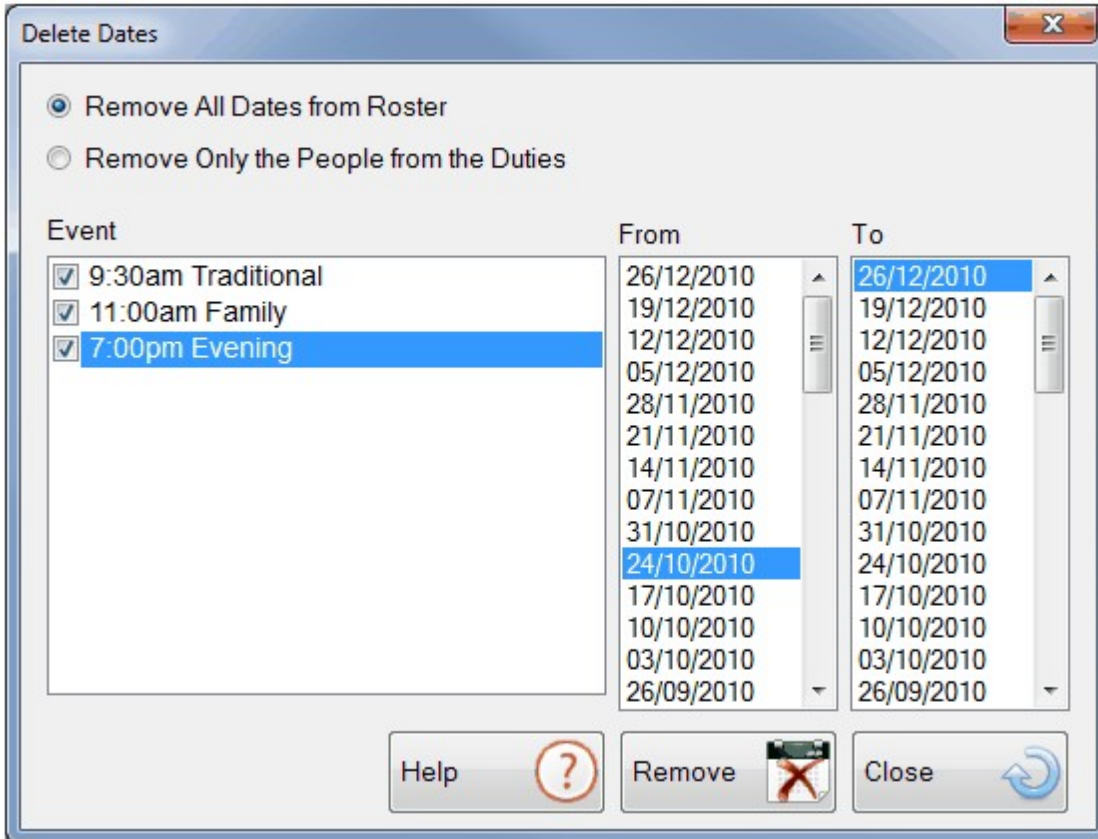
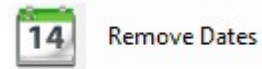
Statistics

This shows the participation statistics for the selected person. You can change the date range on this screen and press Re Do to refresh the statistics displayed.



Remove Dates

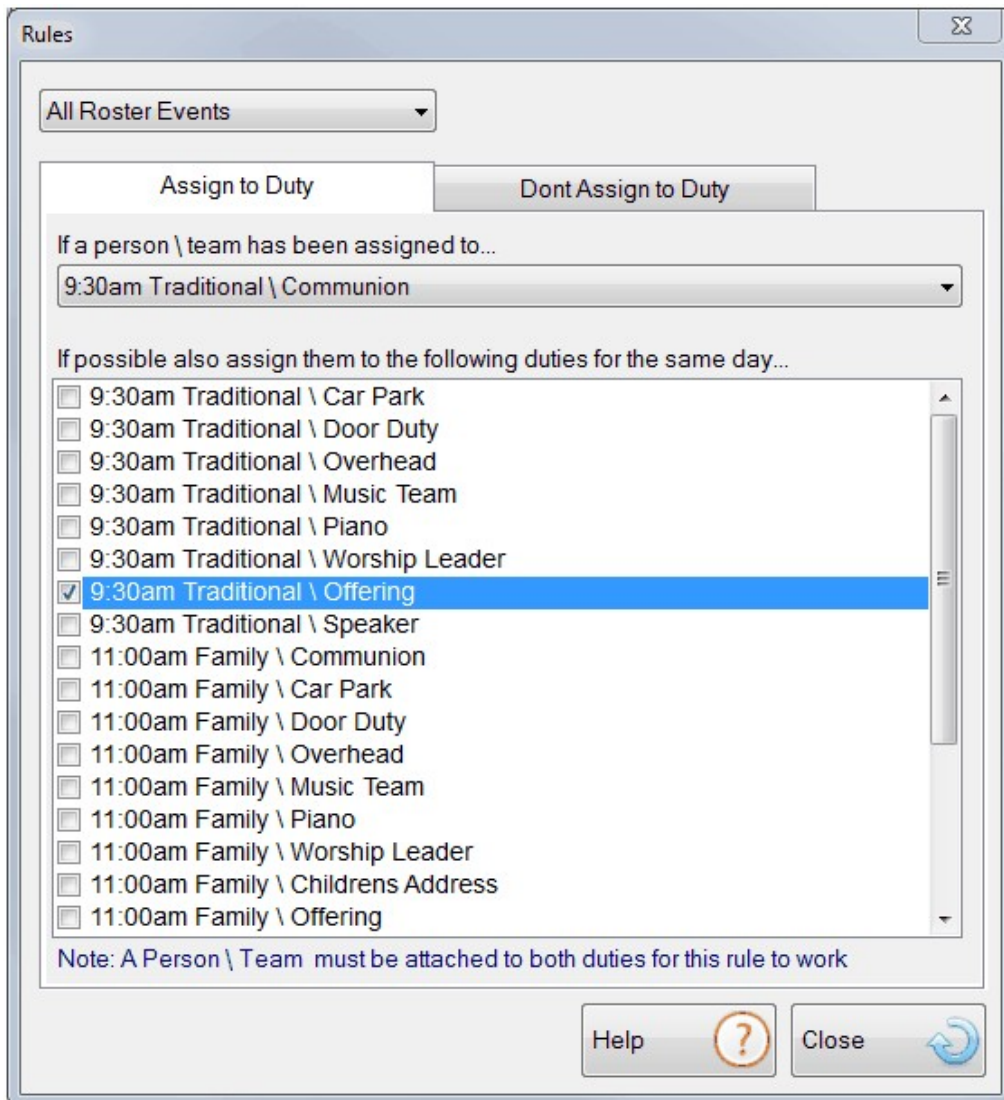
The remove dates function lets you select an event (or a number of events) and a date range to clear. You can choose to clear the dates and all attached people etc from those dates, or to only remove People from the duties.



Rules

The rules button on the tool bar opens the Event Rules window. This area controls interaction between all of the duties in the roster area, including duties on different events. This is a powerful control for the Auto Build feature that allows you to prioritise people across events and duties. For example, you can set a rule that if someone is on the 8:30 am Service as a pianist, you also want them on the 10:30 service as a pianist. Or you can exclude someone from a duty based on their participation in another duty. This is best explained with an example below.

In this case if a person has been assigned to the 9:30 Am Service on Communion Setup, we also want them if possible to be assigned to the 9:30 am Service for Offering Duty as well.



Don't Assign to Duty

Inversely, you can also use the same type of rule to NOT assign a person to a duty if they are involved in another duty. This is ideal if you have people who do more than one duty, but you don't want them rostered on for say Piano and Offering at the same time!

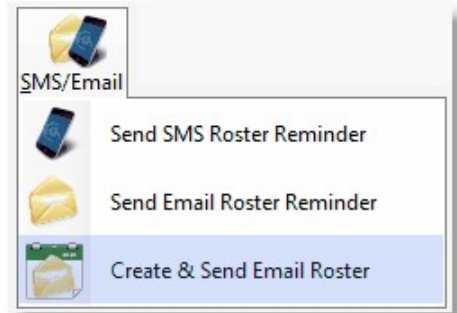
Create & Send Email Roster

As well as having individual reminders able to go out to people for a specific date, this feature allows you to publish to PDF a Personalised Roster for each person on a roster, and email them a calendar with their days and commitments highlighted.

This option is available from the Roster Toolbar, SMS/Email button.



Click on each part of the Create and Send Email Roster window shown below for more information.



Event

- 9:30am Traditional
- 11:00am Family
- 7:00pm Evening

Duty

- Piano
- Worship Leader
- Childrens Address
- Offering
- Speaker
- Communion
- Kitchen

Duty Order

Up ↑
Down ↓

From

- 26/12/2010
- 19/12/2010
- 12/12/2010
- 05/12/2010
- 28/11/2010
- 21/11/2010
- 14/11/2010
- 07/11/2010

To

- 26/12/2010
- 19/12/2010
- 12/12/2010
- 05/12/2010
- 28/11/2010
- 21/11/2010
- 14/11/2010
- 07/11/2010

Roster Format

Family
 Individual

Load Hidden Emails

Rostered On WITH a Email Address

Tag	Surname	Given
<input checked="" type="checkbox"/>	Allwright	Stephen
<input checked="" type="checkbox"/>	Allwright	Marion
<input checked="" type="checkbox"/>	Angel	Peter
<input checked="" type="checkbox"/>	Angel	Belinda
<input checked="" type="checkbox"/>	Angel	Helen
<input checked="" type="checkbox"/>	Anglin	Brent
<input checked="" type="checkbox"/>	Anglin	Katey
<input checked="" type="checkbox"/>	Anglin	Mathew

Rostered On WITHOUT a Email Address

Tag	Name
<input type="checkbox"/>	Flemming John
<input type="checkbox"/>	Flemming Julie
<input type="checkbox"/>	Flemming Lyndon
<input type="checkbox"/>	Flemming Merideth
<input type="checkbox"/>	Flemming Alister
<input type="checkbox"/>	Flemming Penny
<input type="checkbox"/>	Flemming Johnathon
<input type="checkbox"/>	Gordan James

Subject Your Roster is attached

Rich Text Editor: Arial 10 B I U [Formatting icons] 100%

Given Names [icon] Surname [icon]

Dear [Given], please find attached your personal roster. Thanks for your participation at church, and we really appreciate your commitment.

Regards

Graham
Worship Team Leader

Sample Personalised Roster

Shown below is a sample personalised roster for Stephen Allwright. His commitments have been automatically highlighted in blue. The highlight can be changed to any colour you like!

Roster Report
Allwright Stephen

Date \ Event	Car Park	Door Duty	Overhead	Music Team	Piano	Worship Leader		
14/11/2010 9:30am Traditional		Stephen Allwright Marion Allwright	Karren Barton	Ernie Barton Levi Anglin Marion Allwright	Heather Brown	Ross Graham	C	
14/11/2010 11:00am Family		Stephen Allwright Peter Angel	Nathan Kean Jannet Kean Mike Knight	Greg Nixon	Milton Potter Bruce Oliver Peter Morton Sophie Read	Peter Angel	Wendy Iles	J
21/11/2010 9:30am Traditional		Peter Angel Belinda Angel	Dot Blackeby	Stephen Allwright Peter Angel Helen Angel	Frank Blackeby	Janis Graham		
21/11/2010 11:00am Family	Helen Angel Mathew Anglin	Julie Flemming Sue Knight Stephen Allwright	Karren Potter	Esther Nixon Christine Morton Paula Morton Nathan Potter	Belinda Angel	Leanne Iles	J	
05/12/2010 9:30am Traditional		Katey Anglin Mathew Anglin	Levi Anglin	Joshua Brown Adrien Chapman Wendy Potter	Peter Gray	Leanne Leah		
12/12/2010 11:00am Family	Kerryn Anglin Mum Barton	Ruby Dobber Hugo Dobber Jack Eadon	Ryan Jones	Milton Potter Bruce Oliver Esther Nixon Christine Morton	Andrew Read	Stephen Allwright	S	
10/12/2010		Stephen Allwright	Big Boy Barton	Heather Blackeby	Annita Harris	Christopher Lusk		

Create and Send Toolbar



Send

Send your personalised Roster to all selected people. You can choose to send all to the [Email Queue](#) and dispatch immediately, or you can Send to the [Email Queue](#) for dispatch later.



Spell

Access the Spell Checker Settings



Tracking

Turn on Email Tracking for the message you are about to send. See [Tracking Email](#) for more information



Save

Save the currently composed Email message as a template for re-use. This is ideal if you batch different areas of church together for different rosters. For Example, a Roster for Sunday School, Worship Team, Scouts, Back of House, Front of House etc



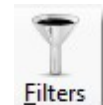
Queue

See the [Email Queue](#) topic for full details on how the Email queue manages the sending of Email messages.



Load

Load a previously saved Email message template for re-use.



Filters

Use [Filters](#) to narrow down even further the list of people you want to send an Email reminder to.



Test

Send a test email and sample personalised Roster Attachment for trying out your email.

Select Event

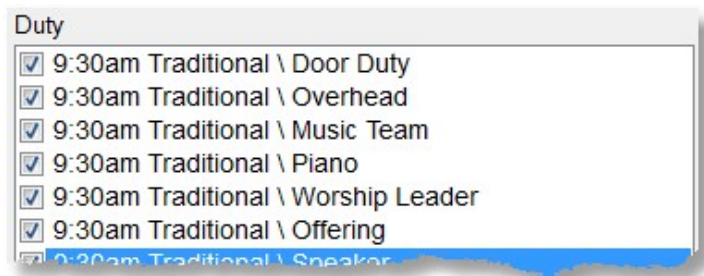
To select people to receive an Email Personalised Roster, you must first select the Event(s) that you want to send Rosters to.

Note: As people may well be rostered on for more than one duty in one day or even at one event, Pastoral Care will automatically combine the commitments into one roster report.



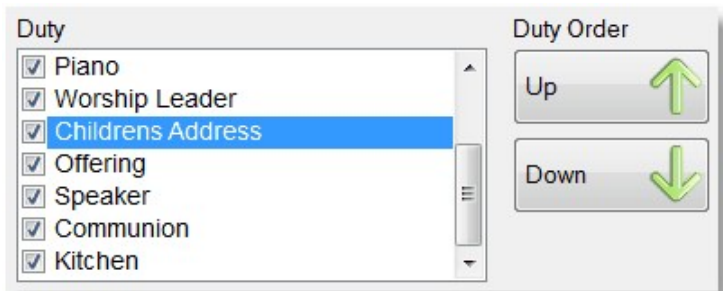
Select Duties

Select the duties that you want to send reminders for.



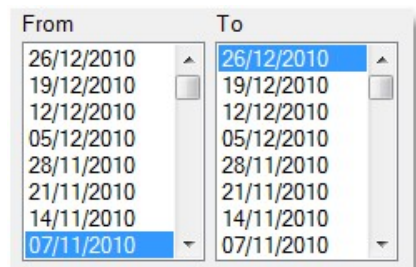
Duty Order

Selecting duties, and the Order of the duties will control what duties are displayed on the roster, and what order they are in on the roster grid. Duties shown in the example above will appear on the grid as Column Headers from Left to Right. Piano first, Worship Leader Second, Childrens Address third etc.



Date Range

Select the date range for the Roster Report to be produced for,



Roster Format

You can choose for format the rosters for Family or Individual output. For Family Output, Pastoral Care will prioritise email address selection to a Family email address first, and the roster grid produced will have people highlighted that are in a family.



Load Hidden Emails

Tick this option to allow Pastoral Care to use Hidden Email address information if needed to send a roster to.



Rostered On with Email Address

Tick those people in this list that you want to email a personalised roster to. If you select one person, you can then press the Tag All button to then tick all people in this list to receive a roster.

Tag	Surname	Given
<input checked="" type="checkbox"/>	Allwright	Stephen
<input checked="" type="checkbox"/>	Allwright	Marion
<input checked="" type="checkbox"/>	Angel	Peter
<input checked="" type="checkbox"/>	Angel	Belinda
<input checked="" type="checkbox"/>	Angel	Helen

Tag / Untag All

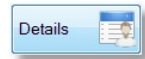
Use the Tag / Untag All buttons to select all People or de-select all People.

Note: If a person is highlighted in the "Rostered On With Email Address" list, then the Tagging Functions will work in that list, if the other "No Email Address" list is selected, then the Tagging Functions will work on that list.



Details

Press the details button to display the following Details Window.



This window shows to the **Email Address to send reminder to**, and allows you to select another email address and press Replace to swap the selected email address to another address.

Email Roster Details ✕

Rostered On Duties for...

Allwright Stephen

26/12/2010 \ 9:30am Traditional \ Offering

Email Address to send Reminder to...

stephen@spirit.com.au (Personal Email)

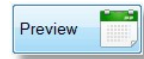
Alternate Email address available on family file

Email Address	Type	Owner	Hidden
stephen@spirit.com.au	Personal Email	Stephen	No
marion@thenet.com	Business Email	Marion	No

Help ?
Replace
Close

Preview

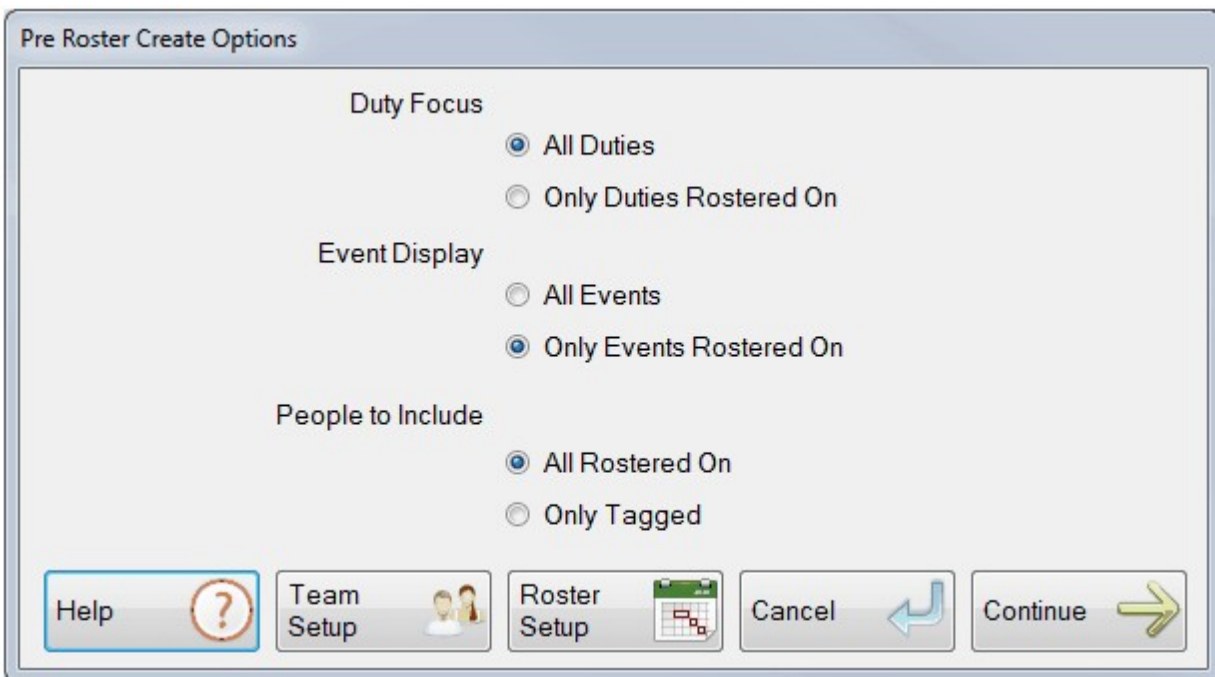
Press the Preview Button to preview a personalised roster for the currently selected person / Family.



The following Roster Control window opens up letting you select options for creating the roster for a preview.



Click on each part of this window to learn more about the roster preview options.



Duty Focus

Chose to include All selected duties on the roster preview, or only the Duties Rostered On. As this is a report for a personalised roster, the Duties Rostered On selection will produce a roster that only includes duties that the person or family is rostered on for, no other duties will be displayed on the report.

Duty Focus

- All Duties
- Only Duties Rostered On

Event Display

Chose to include All Events on the roster preview, or only the Events Rostered On. As this is a report for a personalised roster, the Events Rostered On selection will produce a roster that only includes Events that the person or family is rostered on for, no other Event will be displayed on the report.

Event Display

- All Events
- Only Events Rostered On

People to Include

Choose how many people to include on the roster preview report. All Rostered on will include all people in the selected roster, Only Tagged will display only the people ticked.

People to Include

- All Rostered On
- Only Tagged

Team Setup

You can use Team names on a roster grid, instead of people's names. You must have setup teams for this to work of course! See [Adding Teams to Duties](#) for information on how to setup teams.



Click on each part of the Team Setup window below to learn more.

Team Setup

Replace people assigned in Teams with the Team name

Display Team Members after the Grid

Team to Display and Order to Display

<input checked="" type="checkbox"/>	9:30am Traditional \ Door Duty \ Door Team 2
<input checked="" type="checkbox"/>	9:30am Traditional \ Door Duty \ Door Team 1
<input type="checkbox"/>	9:30am Traditional \ Music Team \ Music Team 1
<input type="checkbox"/>	9:30am Traditional \ Music Team \ Music Team 2
<input type="checkbox"/>	9:30am Traditional \ Music Team \ Music Team 3
<input type="checkbox"/>	9:30am Traditional \ Music Team \ Music Team 4
<input type="checkbox"/>	11:00am Family \ Car Park \ Car Park Team 1
<input type="checkbox"/>	11:00am Family \ Car Park \ Car Park Team 2
<input type="checkbox"/>	11:00am Family \ Car Park \ Car Park Team 3
<input type="checkbox"/>	11:00am Family \ Music Team \ Music Team 2
<input type="checkbox"/>	11:00am Family \ Music Team \ Music Team 3
<input type="checkbox"/>	11:00am Family \ Music Team \ Music Team 4
<input type="checkbox"/>	11:00am Family \ Music Team \ Music Team 1
<input type="checkbox"/>	7:00pm Evening \ Door Duty \ Door Team 1

Include Roster Event name

Up

Down

Left Aligned

Centre Text

Right Aligned

Members

Help

Close

Tick this option to use a Team name in a roster grid, instead of people's own names.

Replace people assigned in Teams with the Team name

Tick this option to print out a list of each member of each team that is on the roster. This helps to remind people who is on their team.

Display Team Members after the Grid

Tick the Teams that you want to include on the roster.

Those not ticked will not be printed out or exported to PDF for the roster report.

Team to Display and Order to Display

- 9:30am Traditional \ Door Duty \ Door Team 2
- 9:30am Traditional \ Door Duty \ Door Team 1
- 9:30am Traditional \ Music Team \ Music Team 1
- 9:30am Traditional \ Music Team \ Music Team 2
- 9:30am Traditional \ Music Team \ Music Team 3
- 9:30am Traditional \ Music Team \ Music Team 4
- 11:00am Family \ Car Park \ Car Park Team 1
- 11:00am Family \ Car Park \ Car Park Team 2

Use the Sort Buttons to change the order of team based duties displayed on the Roster Grid.

Up 

Down 


Set the alignment for the text for Team Names displayed / printed on the Roster grid.

Left Aligned

Centre Text

Right Aligned

Press Members to see a list of the names of people in the currently selected (highlighted) team.

Members 

Tick this option to include the Event Name along site the Team/Duty description.

Include Roster Event name

Roster Setup

The Roster setup window is available from anywhere a roster is ready to be generated. This screen gives you heaps of options on the formatting of the roster report.



Click on each part of the window below to learn more.

Column & Row Titles Font

Font: Arial | 8

Bold Italic Underline

Colour: Black

Left Centre Right

Roster Grid Font

Font: Arial | 8

Bold Italic Underline

Colour: Black

Left Centre Right

Enable Shade Alternate Days (LightGray)

Enable Grid Background Shading (LightYellow)

Enable Events Title Background Shading (LightGray)

Enable Duty Title Background Shading (LightGray)

Include Message

Left Middle Right

Date Format: dd/mm/yyyy

Name Format: Given Name, Surname

Cell Sizing: Auto Size Cells

Allow Vertical Centering within Grid

Allow Substitute Text

Darken line between Different Dates

Names total per line within cell: 1

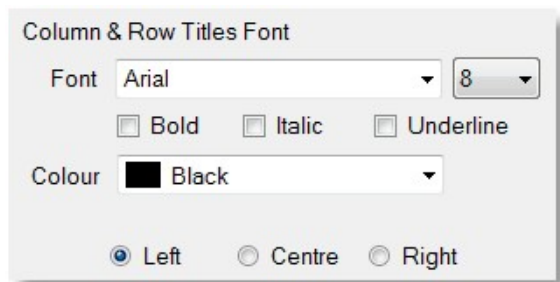
Enable Highlight for Personal Rosters (DarkGray)

Page Layout: A4 Landscape

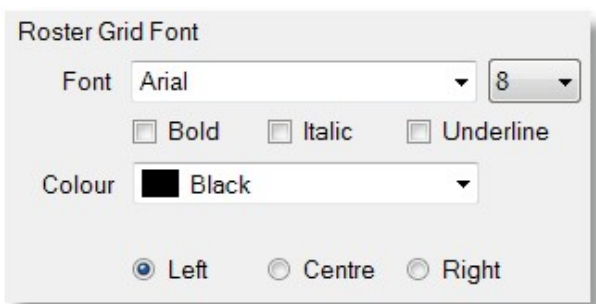
Left Margin: 0 CM

Help ? Reset Close

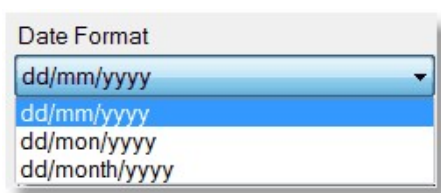
Set the font options for the Titles that name each Row and Column.



Set the main Grid Font options. If you are running out of room on the Roster Grid, you can try Arial Narrow 8 point as a recommendation.

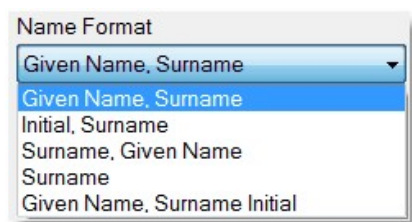


Choose from 3 different Date Formats for display on a Roster Grid report.



Format	Example
dd/mm/yyyy	14/12/2013
dd-mon-yyyy	14-Dec-2012
dd-month-yyyy	14-December-2012

There are 5 different name formats to select from.



Name Format	Example
-------------	---------

Given Name, Surname	John Graham
Initial, Surname	J. Graham
Surname, Given Name	Graham, John
Surname	Graham
Given Name, Surname Initial	John G

Select a Cell Size method. We recommend Auto Sizing for best results. Using Equal Duty Columns sets Pastoral Care in a mode that will select one best fit size and apply this to all cells.

Cell Sizing

- Auto Size Cells
- Auto Size Cells
- Set Duty Columns Equal

Tick this to allow the cell text to be centered vertically in the grid.

Allow Vertical Centering within Grid

Tick this option to allow the use of a person's Substitute Name as setup in a person's personal duty preferences.

Allow Substitute Text

As dates run down the page on our roster grid reports, you can tick this to put a darker line between each separate date.

Darken line between Different Dates

In each roster grid cell you will often have more than one name. You can force a name onto a new line by leaving this setting as One, or if you increase this to 2 names per line, then 2 people will be on each line withing the cell. See sample below.

Names total per line within cell

1 Name Per Line

2 Names per line

J. Graham H.Baker	J. Graham, H. Baker
----------------------	---------------------

Set a colour for background shading on a person's own cell when they have a rostered on duty to perform. This feature will only work for Family or Individual personalised roster grid reports.

Choose the best page layout to suit the size of your roster.

Page Layout
 A4 Landscape
 Left Margin 0 CM

Choose this option to set a colour as a background for each alternate day.

Enable Shade Alternate Days
 LightGray

This sets a default colour as the main background for all Cells that contain people's names on a Roster Grid report.

Enable Background Grid Shading
 LightYellow

Tick this option to allow you to select a colour for the background of the Event Titles.

Enable Background Events Title Shading
 LightGray

Tick this option to allow you to select a colour for the background of the Duty Titles.

Enable Background Duty Title Shading
 LightGray

Include Message

Enter a message here to be included at the end of any Roster Grid Report

Left
 Middle
 Right

Tick this option to allow you to enter a message that will be printed at the end of any Roster Grid Report. The message can be Left, Middle or Right Aligned.

Rostered On without Email Address

Tick those people in this list that you want to print a personalised roster for. If you select one person, you can then press the Tag All button to then tick all people in this list to receive a roster.

Pastoral Care cannot send these people an email, unless you exit the roster program, and add an email address to them.

Rostered On WITH a Email Address

Tag	Surname	Given
<input checked="" type="checkbox"/>	Allwright	Stephen
<input checked="" type="checkbox"/>	Allwright	Marion
<input checked="" type="checkbox"/>	Angel	Peter
<input checked="" type="checkbox"/>	Angel	Belinda
<input checked="" type="checkbox"/>	Angel	Helen

Compose Email

At the bottom of the Email Roster window is the Compose Email area. Here you can type a subject, use Font Controls to select different fonts and settings, and use the Given and Surname buttons to insert a person's Given or Surname or both into the email.

Notice that unlike the Email SMS Reminder feature, you cannot insert a field for a person's Roster Event, as this feature is designed to send an attached roster for multiple dates and events, making the need and use for such a field impractical.

Subject: Your Roster is attached

Arial 10 B I U [List Icons] 100%

Given Names [Icon] Surname [Icon]

Dear [Given], please find attached your personal roster. Thanks for your participation at church, and we really appreciate your commitment.

Regards

Graham
Worship Team Leader

Manual Build Roster

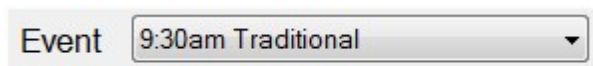
Even though Pastoral Care can Auto Build your roster, you can also manually assign people to a rostered event / duty. You should still program in [Absence](#) information, and use either [Method 1](#) or [Method 2](#) on the Participants toolbar icon to assign properties to each person before using the method described below.

See Also [Build Dates](#), [Adding People to Duties](#) and [Auto Build](#) for more information on building rosters.

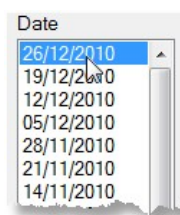
Steps to add a manual roster

After setting all of your dates, absences and rules, from the main screen of the Roster Program:

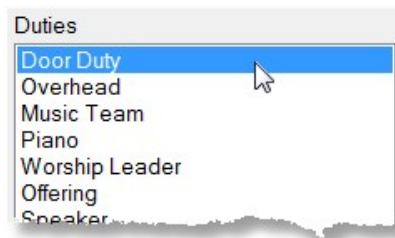
Select your event to Edit



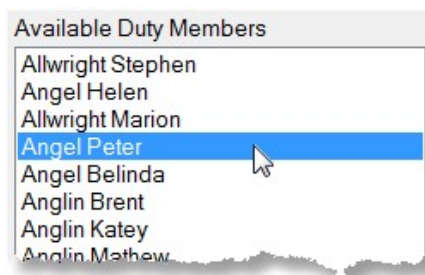
Select a Date from the list of dates on the left hand side of the Roster main window.



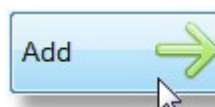
Select a duty to edit in the Duties List



Select a person from the Available Duty Members List



Double click on their name, or press the Add Button to add them to that Duty for that Event on that Day!



Publishing Your Roster

Now you have created a roster, it's time to tell people when they have a Duty to perform. There are several different ways of doing this, and these are covered in the following topics.

Roster Reports

Create a number of really easy to read Roster Reports that can be tailored for Individual Focus, Family Focus, or Whole Church focus.

Click on [Roster Reports](#) for full details.

SMS and Email

Use SMS and or Email to remind people when they are on, and to also publish your roster too!

See [SMS / EMAIL](#) for full details.

Roster Reports



Roster Reports can be selected from the toolbar of the Roster area. The reports are mostly only useful when you have created rosters, however there are also some reports that show people not assigned to duties and other statistics that may or may not be dependent on having rosters built and distributed.



Click on each part of the Roster Reports window shown below to learn more.

Date Event	Car Park	Door Duty	Overhead	Music Team
11/01/2013 9:30am Traditional		Thomas Angel Belinda Angel	Kerryn Anglin	Levi Anglin Marion Allwright Stephen Allwright
11/01/2013 11:00am Family	Helen Angel Mathew Anglin	Lyndon Flemming John Flemming Helen Edwards	Ryan Jones	Paula Morton Nathue Potter Korren Potter Greg Taylor
11/01/2013 7:00pm Evening		Alison Bead Marcus Bead	John Brown	Greg Nixon Fran Oliver Milton Potter
18/01/2013 9:30am Traditional		Helen Angel Brent Anglin	Raymond Barton	Thomas Angel Helen Angel Kerryn Anglin
18/01/2013 11:00am Family	Brent Anglin Belinda Angel	Edith Eadon Ruby Dobbie Hugg Dobbie	Lauren Jones	Ruth Taylor Andrew Bead Anna Bead Alison Bead
18/01/2013 7:00pm Evening		Sophie Bead Ruth Chapman	Stephen Collins	Wendy Potter Nathue Potter Ruth Taylor
25/01/2013 9:30am Traditional		Katey Anglin Mathew Anglin	Ethel Barton	Peter Brown Heather Brown Judith Brown
25/01/2013 11:00am Family	Katey Anglin Levi Anglin	Jack Eadon Charlie Jones Wendy Jones	Wendy Jones	Milton Potter Bruce Oliver Peter Morton Sophie Bead
25/01/2013 7:00pm Evening		Adrien Chapman John Brown	Lorraine Dimsey	Brenda Taylor Sophie Bead Andrew Bead
01/02/2013 9:30am Traditional		Sophie Bead Ruth Chapman	Ernie Barton	Adrien Chapman Wendy Potter Korren Potter
01/02/2013 11:00am Family	Kerryn Anglin Ethel Barton	Lauren Jones Jill Jones Ryan Jones	Charlie Jones	Eather Nixon Christine Morton Paula Morton Nathue Potter
01/02/2013 7:00pm Evening		Hannah Chapman Stephen Collins	Sarah Dimsey	Judy Morton Anna Bead Alison Bead
08/02/2013 9:30am Traditional		Stephen Allwright Marion Allwright	Korren Barton	Anna Bead Andrew Bead Peter Morton
08/02/2013 11:00am Family	Raymond Barton Ernie Barton	Nathan Keen Janet Keen Mike Knight	Jill Jones	Korren Potter Greg Taylor Ruth Taylor Andrew Bead

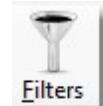
Process

Pressing the Process button will run the currently selected report.



Filters

Use any standard Pastoral Care [Filters](#) to restrict further who goes on the report.



Format

Use the standard Pastoral Care [Format](#) options to further adjust any roster report



Report Preview

The report preview pane shows a sample of the selected report.

Common Roster Grid Features

There are a number of control windows that are used in various reports for the Rosters Area. They are described below.

[Team Setup](#)

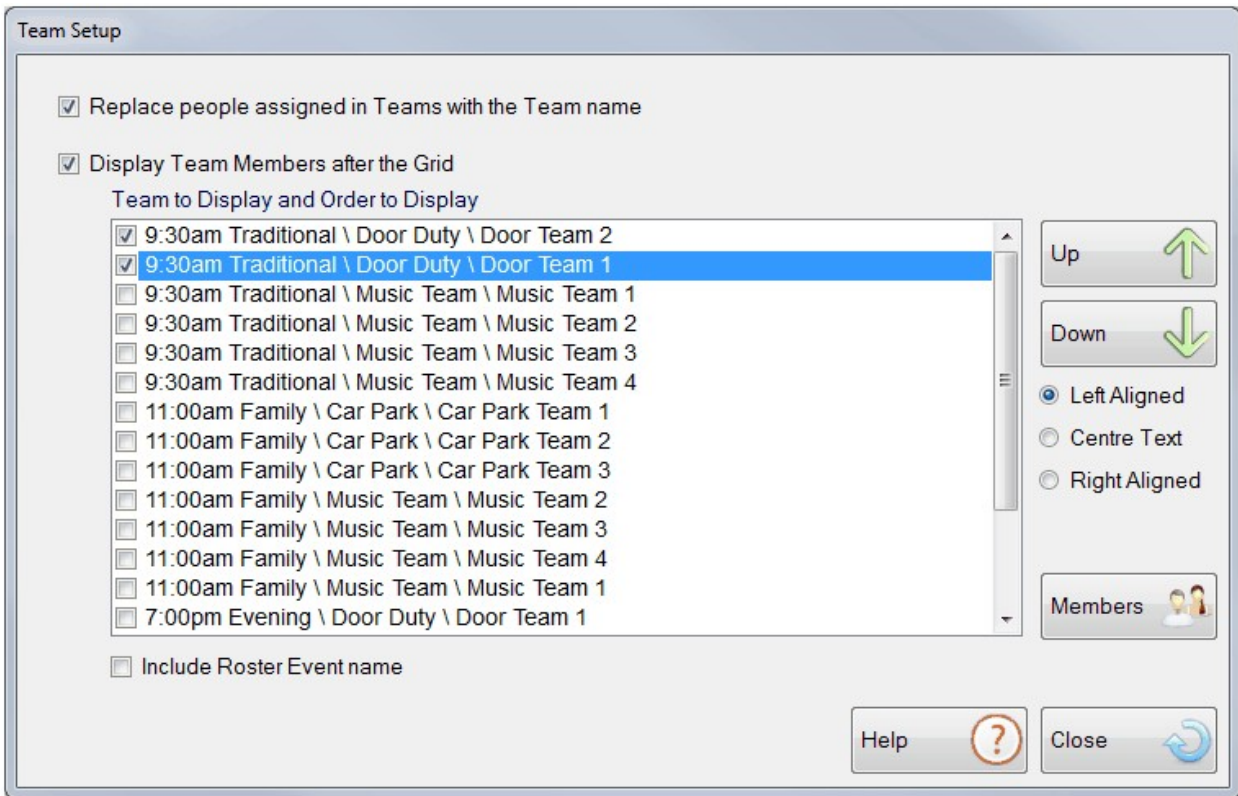
[Roster Setup](#)

Team Setup

You can use Team names on a roster grid, instead of people's names. You must have setup teams for this to work of course! See [Adding Teams to Duties](#) for information on how to setup teams.



Click on each part of the Team Setup window below to learn more.



Replace People with Team Name

Tick this option to use a Team name in a roster grid, instead of people's own names.

Replace people assigned in Teams with the Team name

Display Team Members after the Grid

Tick this option to print out a list of each member of each team that is on the roster. This helps to remind people who is on their team.

Display Team Members after the Grid

Select Team

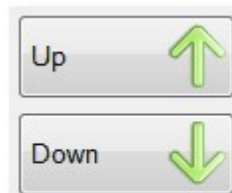
Tick the Teams that you want to include on the roster. Those not ticked will not be printed out or exported to PDF for the roster report.

Team to Display and Order to Display

<input checked="" type="checkbox"/>	9:30am Traditional \ Door Duty \ Door Team 2
<input checked="" type="checkbox"/>	9:30am Traditional \ Door Duty \ Door Team 1
<input type="checkbox"/>	9:30am Traditional \ Music Team \ Music Team 1
<input type="checkbox"/>	9:30am Traditional \ Music Team \ Music Team 2
<input type="checkbox"/>	9:30am Traditional \ Music Team \ Music Team 3
<input type="checkbox"/>	9:30am Traditional \ Music Team \ Music Team 4
<input type="checkbox"/>	11:00am Family \ Car Park \ Car Park Team 1
<input type="checkbox"/>	11:00am Family \ Car Park \ Car Park Team 2
<input type="checkbox"/>	11:00am Family \ Car Park \ Car Park Team 3

Sort

Use the Sort Buttons to change the order of team based duties displayed on the Roster Grid.



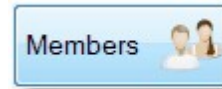
Alignment

Set the alignment for the text for Team Names displayed / printed on the Roster grid.

Left Aligned
 Centre Text
 Right Aligned

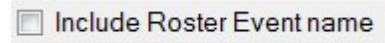
Members

Press Members to see a list of the names of people in the currently selected (highlighted) team.



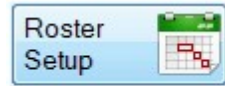
Include Roster Event Name

Tick this option to include the Event Name along side the Team/Duty description.



Roster Setup

The Roster setup window is available from anywhere a roster is ready to be generated. This screen gives you heaps of options on the formatting of the roster report.



Click on each part of the window below to learn more.

Column & Row Titles Font

Font:

Bold Italic Underline

Colour:

Left Centre Right

Roster Grid Font

Font:

Bold Italic Underline

Colour:

Left Centre Right

Enable Shade Alternate Days

Enable Grid Background Shading

Enable Events Title Background Shading

Enable Duty Title Background Shading

Include Message

Left Middle Right

Date Format

Name Format

Cell Sizing

Allow Vertical Centering within Grid

Allow Substitute Text

Darken line between Different Dates

Names total per line within cell:

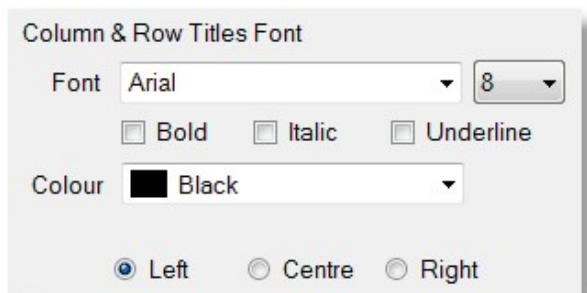
Enable Highlight for Personal Rosters

Page Layout

Left Margin: CM

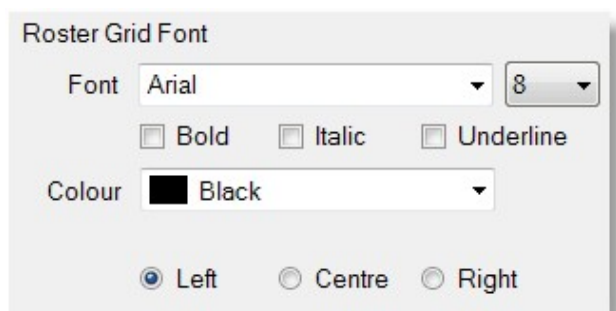
Column & Row Titles Font

Set the font options for the Titles that name each Row and Column.



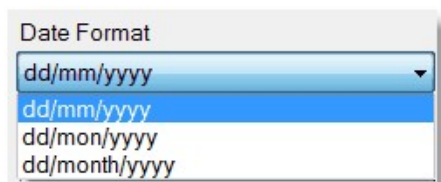
Roster Grid Font

Set the main Grid Font options. If you are running out of room on the Roster Grid, you can try Arial Narrow 8 point as a recommendation.



Date Format

Choose from 3 different Date Formats for display on a Roster Grid report.

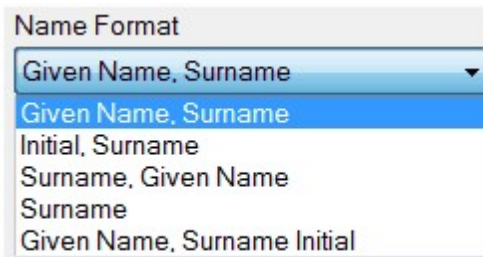


Format	Example
dd/mm/yyyy	14/12/2013
dd-mon-yyyy	14-Dec-2012
dd-month-yyyy	14-December-2012

Name Format

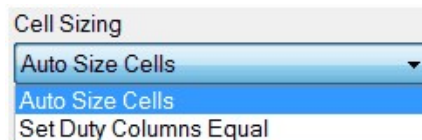
There are 5 different name formats to select from.

Name Format	Example
Given Name, Surname	John Graham
Initial, Surname	J. Graham
Surname, Given Name	Graham, John
Surname	Graham
Given Name, Surname Initial	John G



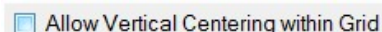
Cell Sizing

Select a Cell Size method. We recommend Auto Sizing for best results. Using Equal Duty Columns sets Pastoral Care in a mode that will select one best fit size and apply this to all cells.



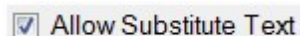
Vertical Centering

Tick this to allow the cell text to be centered vertically in the grid.



Substitute Text

Tick this option to allow the use of a person's Substitute Name as setup in a person's personal duty preferences.



Date Separator

As dates run down the page on our roster grid reports, you can tick this to put a darker line between each separate date.



Names Per Line

In each roster grid cell you will often have more than one name. You can force a name onto a new line by leaving this setting as One, or if you increase this to 2 names per line, then 2 people will be on each line withing the cell. See sample below.

Names total per line within cell

1 Name Per Line

2 Names per line

J. Graham H.Baker	J. Graham, H. Baker
----------------------	---------------------

Personal Highlight

Set a colour for background shading on a person's own cell when they have a rostered on duty to perform. This feature will only work for Family or Individual personalised roster grid reports.

Page Layout

Choose the best page layout to suit the size of your roster.

Page Layout

 Left Margin CM

Shade Alternate Days

Choose this option to set a colour as a background for each alternate day.

Enable Shade Alternate Days

Grid Background Shading

This sets a default colour as the main background for all Cells that contain people's names on a Roster Grid report.

Enable Background Grid Shading

Events Title Background Shading

Tick this option to allow you to select a colour for the background of the Event Titles.

Enable Background Events Title Shading

LightGray

Duty Title Background Shading

Tick this option to allow you to select a colour for the background of the Duty Titles.

Enable Background Duty Title Shading

LightGray

Include Message

Include Message

Enter a message here to be included at the end of any Roster Grid Report

Left
 Middle
 Right

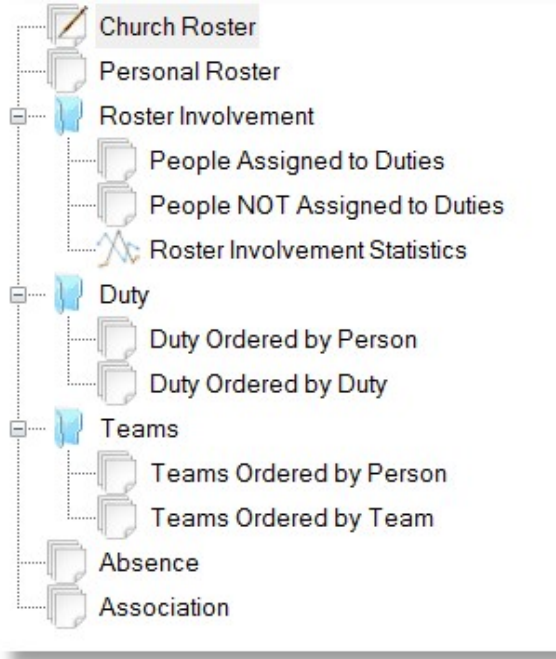
Tick this option to allow you to enter a message that will be printed at the end of any Roster Grid Report. The message can be Left, Middle or Right Aligned.

Available Reports

Shown below is the list of available Roster Reports. The Church Roster and Personal Roster both use a few common features. These are described in the [Common Roster Grid Features](#) area.



Click on each report (Right) for more information.



Church Roster

The Church Roster Report is a Roster Grid Report, rather like a spreadsheet in its look, that is designed for anyone at church to read. This is not personalised for individuals or families, and as such, people are not specifically highlighted.

Options Available for this report are:

[Church Roster Options](#)

[Team Setup](#)

[Roster Setup](#)

See [Sample Church Roster Report](#) for a sample Roster Grid Report.

Sample Church Roster Report

This is a sample Church Roster report. Note the days are alternate shaded in this example. Full Control is available for colours, shading and fonts used in this report.

Roster Report

Date \ Event	Communion	Car Park	Door Duty	Overhead	Music Team	Piano	Worship Leader	Childrens Address	Offering	Speaker
14/11/2010 9:30am Traditional			Stevo Allwright Maz Allwright	Karren Barton	Ernie Barton Levi Anglin Maz Allwright	Heather Brown	Ross Graham		Maz Allwright Stevo Allwright	Alison Read
14/11/2010 11:00am Family		Stevo Allwright Peter Angel	Nathan Kean Jannet Kean Mike Knight	Greg Nixon	Milton Potter Bruce Oliver Peter Morton Sophie Read	Peter Angel	Wendy Iles	Joel Graham	Jill Jones Steve Kean Esther Nixon	Andrew Read
14/11/2010 7:00pm Evening				Sue Knight	Bradd Taylor Sophie Read Andrew Read	John Flemming	Levi Anglin		Ben Iles Leanne Iles	Karren Potter
21/11/2010 9:30am Traditional			Peter Angel Belinda Angel	Dot Blackeby	Stevo Allwright Peter Angel Helen Angel	Frank Blackeby	Janis Graham		Peter Angel Marcus Read	Sophie Read
21/11/2010 11:00am Family		Helen Angel Mathew Anglin	Julie Flemming Sue Knight Stevo Allwright	Karren Potter	Esther Nixon Christine Morton Paula Morton Nathan Potter	Belinda Angel	Leanne Iles	Janis Graham	Bruce Oliver Christine Morton Peter Morton	Marcus Read
21/11/2010 7:00pm Evening				Rachael Knight	Judy Morton Anna Read Allison Read	Ernie Barton	Merideth Flemming		Peter Iles Charlie Jones	Nathan Potter
28/11/2010			Helen Angel	Helen Blackeby	Katey Anglin Peter Brown	Adrien Chapman	Peter Gray		Andrew Read Sophie Read	Fran Oliver

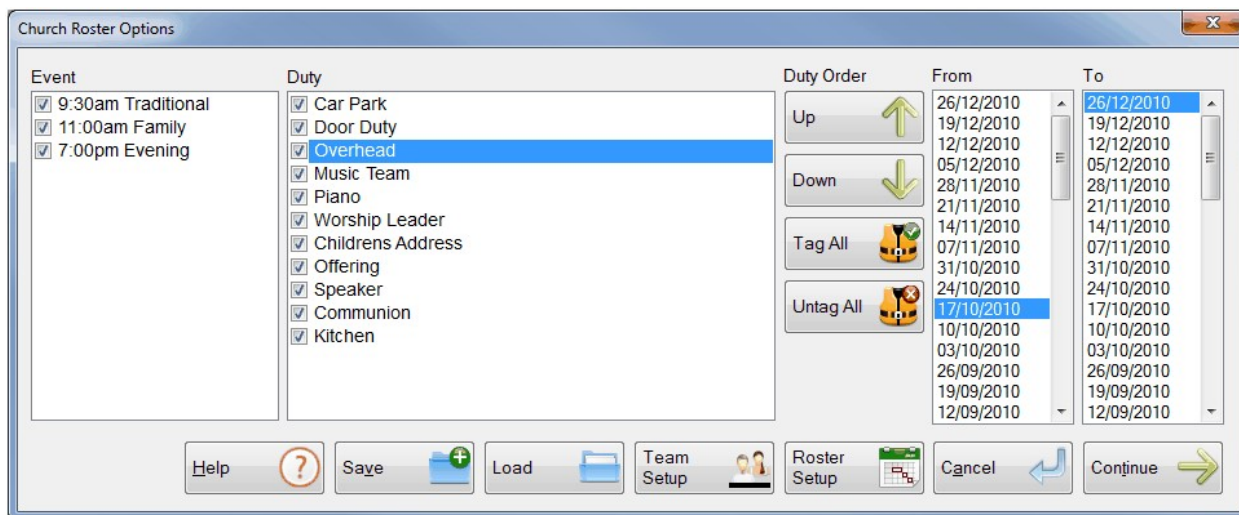
Church Roster Options

The Church Roster Options let you select what duties, which events, your date range etc for displaying on your roster.

Once you have created a Roster that you really like, and you want to use the same or similar settings, you can use [Save](#) and [Load](#) to save a setup to reuse later.



Click on each part of the Roster Options window below to learn more about these options.



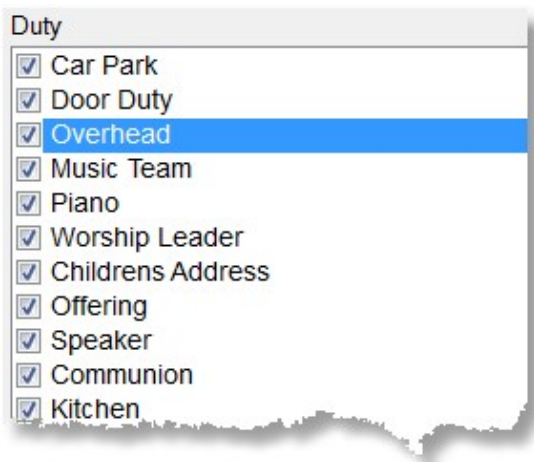
Select Event

Select each event that you want to output to a roster report.



Select Duty

Select each duty that you want to include on the roster report.



Duty Order

Use the sort buttons to change the order of Duties. This will order the columns for the duties based on the order of the list.

You can use this to group your duties into sensible and logical groupings.



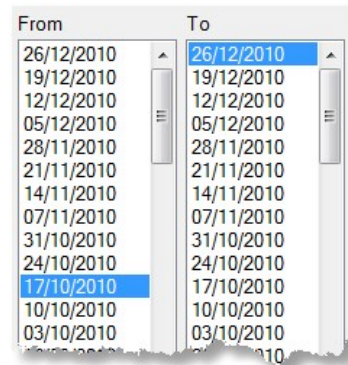
Tag / Un Tag All

Use these buttons to alternatively Tag (tick) all duties or Un-Tag them (Un-tick them)



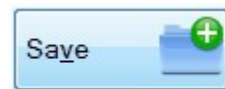
Select Date Range

Select a From and To date to produce your roster report for.



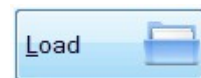
Save

By using the Save button, you can save all the settings on this window for use later. This is a great help if you are producing more than one roster for different areas of .



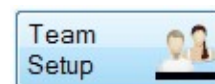
Load

Use the Load button to load in any saved groups of settings.



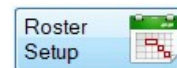
Team Setup

Press the Team Setup button to open the standard setup area for controlling the display of Teams on your Roster Report. See [Team Setup](#) for more information.



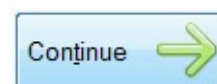
Roster Setup

Press the Roster Setup button to open the standard setup area for controlling the formatting of your Roster Report. See [Roster Setup](#) for more information.



Continue

Pressing Continue on the Roster Options window will create the Roster Report and display it in the Pastoral Care Report Viewer.



Personal Roster

The Personal Roster is the most useful roster for electronic or paper distribution as it creates a roster for a single person, or for a family. See [Sample Individual Roster Report](#) for a view of this great report!

See [Sample Personalised Roster](#) to view what a personalised roster looks like. See also [Create & Send Email Roster](#) for how to create personalised or family rosters and email them all in one area.



Click on each part of the Personal Roster options window to learn more.

Personal Roster Options

Event	Duty	Duty Order	From	To
<input checked="" type="checkbox"/> 9:30am Traditional	<input checked="" type="checkbox"/> Car Park	Up	26/12/2010	26/12/2010
<input checked="" type="checkbox"/> 11:00am Family	<input checked="" type="checkbox"/> Door Duty	Down	19/12/2010	19/12/2010
<input checked="" type="checkbox"/> 7:00pm Evening	<input checked="" type="checkbox"/> Overhead	Tag All	12/12/2010	12/12/2010
	<input checked="" type="checkbox"/> Music Team	Untag All	05/12/2010	05/12/2010
	<input checked="" type="checkbox"/> Piano		28/11/2010	28/11/2010
	<input checked="" type="checkbox"/> Worship Leader		21/11/2010	21/11/2010
	<input checked="" type="checkbox"/> Childrens Address		14/11/2010	14/11/2010
	<input checked="" type="checkbox"/> Offering		07/11/2010	07/11/2010
	<input checked="" type="checkbox"/> Speaker		31/10/2010	31/10/2010
	<input checked="" type="checkbox"/> Communion		24/10/2010	24/10/2010
	<input checked="" type="checkbox"/> Kitchen		17/10/2010	17/10/2010
			10/10/2010	10/10/2010

Format

Family

Individual

Event Display

All Events

Only Events Rostered On

Duty Display

All Duties

Only Duties Rostered On

People to Include

All Rostered On

Only Tagged

Available People on Roster

Tag	Surname	Given
<input checked="" type="checkbox"/>	Allwright	Stephen
<input checked="" type="checkbox"/>	Allwright	Marion
<input checked="" type="checkbox"/>	Angel	Peter
<input checked="" type="checkbox"/>	Angel	Belinda
<input checked="" type="checkbox"/>	Angel	Helen
<input checked="" type="checkbox"/>	Anglin	Brent
<input checked="" type="checkbox"/>	Anglin	Katey
<input checked="" type="checkbox"/>	Anglin	Mathew
<input checked="" type="checkbox"/>	Anglin	Levi
<input checked="" type="checkbox"/>	Anglin	Kerryn
<input checked="" type="checkbox"/>	Barton	Big Ray
<input checked="" type="checkbox"/>	Barton	Mum
<input checked="" type="checkbox"/>	Barton	Ernie

Buttons: Help, Save, Load, Team Setup, Roster Setup, Cancel, Continue

Additional buttons: Tag All, Untag All, Details

Sample Individual Roster Report

Shown below is the Personal Individual Roster Report. Note the Name of the person that report is for, and his / her duties are highlighted for the selected Events and Dates they are on!

Roster Report

Allwright Stevo

Date \ Event	Communion	Car Park	Door Duty	Overhead	Music Team	Piano	Worship Leader	Childrens Address	Offering	Speaker
14/11/2010 9:30am Traditional			Stevo Allwright Maz Allwright	Karren Barton	Ernie Barton Levi Anglin Maz Allwright	Heather Brown	Ross Graham		Maz Allwright Stevo Allwright	Alison Read
14/11/2010 11:00am Family		Stevo Allwright Peter Angel	Nathan Kean Jannet Kean Mike Knight	Greg Nixon	Milton Potter Bruce Oliver Peter Morton Sophie Read	Peter Angel	Wendy Iles	Joel Graham	Jill Jones Steve Kean Esther Nixon	Andrew Read
21/11/2010 9:30am Traditional			Peter Angel Belinda Angel	Dot Blackeby	Stevo Allwright Peter Angel Helen Angel	Frank Blackeby	Janis Graham		Peter Angel Marcus Read	Sophie Read
21/11/2010 11:00am Family		Helen Angel Mathew Anglin	Julie Flemming Sue Knight Stevo Allwright	Karren Potter	Esther Nixon Christine Morton Paula Morton Nathan Potter	Belinda Angel	Leanne Iles	Janis Graham	Bruce Oliver Christine Morton Peter Morton	Marcus Read
05/12/2010 9:30am Traditional			Katey Anglin Mathew Anglin	Levi Anglin	Joshua Brown Adrien Chapman Wendy Potter	Peter Gray	Leanne Leah		Maz Allwright Stevo Allwright	Michael Read

Select Event

Select each event that you want to output to a roster report.

Event

9:30am Traditional

11:00am Family

7:00pm Evening

Select Duty

Select each duty that you want to include on the roster report.

Duty

Car Park

Door Duty

Overhead

Music Team

Piano

Worship Leader

Childrens Address

Offering

Speaker

Communion

Kitchen

Duty Order

Use the sort buttons to change the order of Duties. This will order the columns for the duties based on the order of the list.

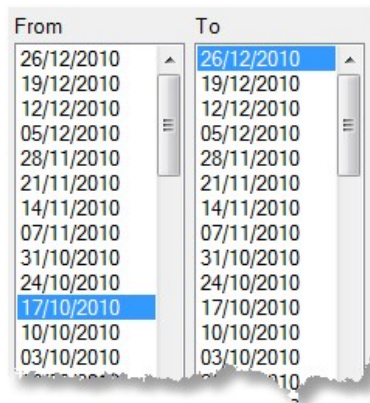
You can use this to group your duties into sensible and logical groupings.

Tag / Un Tag All

Use these buttons to alternatively Tag (tick) all duties or Un-Tag them (Un-tick them)

Select Date Range

Select a From and To date to produce your roster report for.



Select People

Tag the people in the list of Available people to produce a report for.

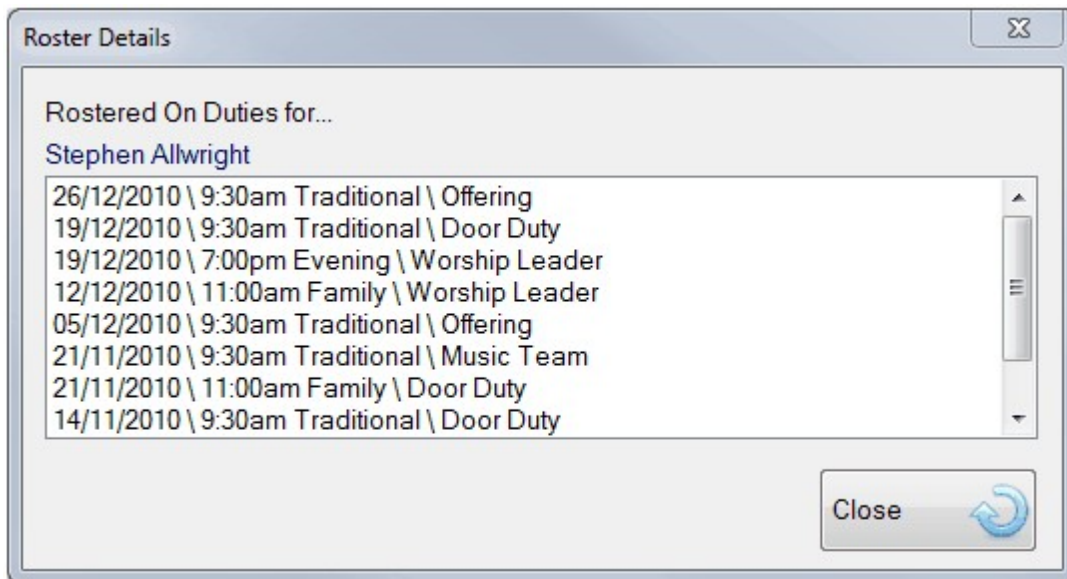
Available People on Roster		
Tag	Surname	Given
<input checked="" type="checkbox"/>	Allwright	Stephen
<input checked="" type="checkbox"/>	Allwright	Marion
<input checked="" type="checkbox"/>	Angel	Peter
<input checked="" type="checkbox"/>	Angel	Belinda
<input checked="" type="checkbox"/>	Angel	Helen

Tag / Untag All

Use the Tag / Untag All buttons to select all People or de-select all People.

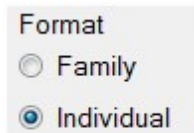
Details

Press the details button to display the following Details Window for the currently selected individual.



Format

Select Family Format to output one report for each family that has people on the roster, or select Individual to produce a report for each person on the roster.



Event Display

In the case of personalised rosters only, you can choose to include All Events on the roster, or to save space (paper!) you can select Only Events Rostered On.

This option is ideal as it creates a roster only for the Days / Events that a person is rostered on for.



Duty Display

All Duties

The All Duties option will display on the roster grid report created, all duties that you have selected. This allows a person to see who else is on doing other duties alongside them.

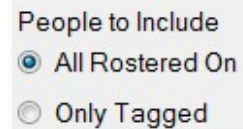


Only Duties Rostered On

This option will only display the Duties that each person is on for on their own roster. This does not allow a person to see who else is rostered on doing other duties alongside them.

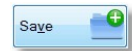
People to Include

Select All Rostered On will show all people on the report that is created, if you select Only Tagged, then ONLY the tagged people will be included on the report. The most widely used option is the default option of All Rostered On.



Save

By using the Save button, you can save all the settings on this window for use later. This is a great help if you are producing more than one roster for different areas of church.



Load

Use the Load button to load in any saved groups of settings.

Team Setup

Press the Team Setup button to open the standard setup area for controlling the display of Teams on your Roster Report. See [Team Setup](#) for more information.

Roster Setup

Press the Roster Setup button to open the standard setup area for controlling the formatting of your Roster Report. See [Roster Setup](#) for more information.

Continue

Pressing Continue on the Roster Options window will create the Roster Report and display it in the Pastoral Care Report Viewer.

Roster Involvement

People Assigned to Duties

The People Assigned to Duties report shows all people assigned to selected duties within a range of events and dates. This is not a report of people that are marked as a Participant in a duty, rather it is a report of people actually assigned to a roster on a duty.

Pre-Flight

The Pre-Flight options for this report are shown below.

Event Select the Event(s) that you want to report on

Duty Select the Duties that you want to report on

Tag Use the Tag All / Un-Tag all to tick all Duties or Untick all duties. You will need a minimum of one Duty selected for this report to run

Date Range Select the range of dates to include information on the report from.

Save & Load Use the Save and Load feature to Save a template for this screen for re-use later. The Load button is for loading in settings that you have saved.

Continue Press Continue to open the report.

Sample Report

Below is a sample Duty Participation Report.

This report is the People Assigned to Duties Report.

On Duty Report			
17/10/2010 to 26/12/2010			
Allwright	Stephen	17/10/2010	11:00am Family \ Worship Leader
		24/10/2010	9:30am Traditional \ Offering
		24/10/2010	7:00pm Evening \ Worship Leader
		14/11/2010	9:30am Traditional \ Door Duty
		14/11/2010	9:30am Traditional \ Offering
		14/11/2010	11:00am Family \ Car Park
		21/11/2010	9:30am Traditional \ Music Team
		21/11/2010	11:00am Family \ Door Duty
		05/12/2010	9:30am Traditional \ Offering
		12/12/2010	11:00am Family \ Worship Leader
		19/12/2010	9:30am Traditional \ Door Duty
		19/12/2010	7:00pm Evening \ Worship Leader
		26/12/2010	9:30am Traditional \ Offering
Allwright	Marion	24/10/2010	9:30am Traditional \ Offering
		14/11/2010	9:30am Traditional \ Door Duty
		14/11/2010	9:30am Traditional \ Music Team
		14/11/2010	9:30am Traditional \ Offering
		05/12/2010	9:30am Traditional \ Offering
		19/12/2010	9:30am Traditional \ Door Duty
		26/12/2010	9:30am Traditional \ Offering

People NOT Assigned to Duties

The People NOT Assigned to Duties report shows all people not assigned to selected duties within a range of events and dates.

This is not a report of people that are simply not assigned a Duty as a Participant in a duty, rather it is a report of people actually NOT assigned to a roster on a duty.

Pre-Flight

The Pre-Flight options for this report are shown below.

The screenshot shows the 'Report Setup' dialog box with the following content:

Event	Duty	From	To
<input checked="" type="checkbox"/> 9:30am Traditional	<input checked="" type="checkbox"/> 9:30am Traditional \ Door Duty	26/12/2010	26/12/2010
<input checked="" type="checkbox"/> 11:00am Family	<input checked="" type="checkbox"/> 9:30am Traditional \ Overhead	19/12/2010	19/12/2010
<input checked="" type="checkbox"/> 7:00pm Evening	<input checked="" type="checkbox"/> 9:30am Traditional \ Music Team	12/12/2010	12/12/2010
	<input checked="" type="checkbox"/> 9:30am Traditional \ Piano	05/12/2010	05/12/2010
	<input checked="" type="checkbox"/> 9:30am Traditional \ Worship Leader	28/11/2010	28/11/2010
	<input checked="" type="checkbox"/> 9:30am Traditional \ Offering	21/11/2010	21/11/2010
	<input checked="" type="checkbox"/> 9:30am Traditional \ Speaker	14/11/2010	14/11/2010
	<input checked="" type="checkbox"/> 11:00am Family \ Car Park	07/11/2010	07/11/2010
	<input checked="" type="checkbox"/> 11:00am Family \ Door Duty	31/10/2010	31/10/2010
	<input checked="" type="checkbox"/> 11:00am Family \ Overhead	24/10/2010	24/10/2010
	<input checked="" type="checkbox"/> 11:00am Family \ Music Team	17/10/2010	17/10/2010
	<input checked="" type="checkbox"/> 11:00am Family \ Piano	10/10/2010	10/10/2010
	<input checked="" type="checkbox"/> 11:00am Family \ Worship Leader	03/10/2010	03/10/2010
	<input checked="" type="checkbox"/> 11:00am Family \ Childrens Address	26/09/2010	26/09/2010
	<input checked="" type="checkbox"/> 11:00am Family \ Offering	19/09/2010	19/09/2010
	<input checked="" type="checkbox"/> 11:00am Family \ Speaker	12/09/2010	12/09/2010
		05/09/2010	05/09/2010
		29/08/2010	29/08/2010

- Event** Select the Event(s) that you want to report on
- Duty** Select the Duties that you want to report on
- Tag** Use the Tag All / Un-Tag all to tick all Duties or Untick all duties. You will need a minimum of one Duty selected for this report to run
- Date Range** Select the range of dates to include information on the report from.
- Save & Load** Use the Save and Load feature to Save a template for this screen for re-use later. The Load button is for loading in settings that you have saved.
- Continue** Press Continue to open the report.

Sample Report

Below is a sample Not On Duty Participation Report.

This report is the People NOT Assigned to Duties Report.

To read this report, as an example, John Brown is Not On Duty between the 17/10 to the 26/12 for the 7PM Evening Service for both Overhead and Speaker duties.

Not on Duty Report

17/10/2010 to 26/12/2010

Brown	John	7:00pm Evening \ Overhead 7:00pm Evening \ Speaker
Chapman	Ruth	7:00pm Evening \ Overhead
Collins	Fred	11:00am Family \ Childrens Address
Collins	Stephen	7:00pm Evening \ Overhead
Dimsey	Dodie	11:00am Family \ Childrens Address 7:00pm Evening \ Piano
Dimsey	Karren	11:00am Family \ Childrens Address 7:00pm Evening \ Piano
Dimsey	Mandy	7:00pm Evening \ Piano
Dimsey	Sarah	7:00pm Evening \ Piano
Dobber	Hugo	7:00pm Evening \ Piano

Roster Involvement Statistics

This report shows the number of times each person in the report is on a duty.

Pre-Flight

The Pre-Flight options for this report are shown below.

Event Select the Event(s) that you want to report on

Duty Select the Duties that you want to report on

Tag Use the Tag All / Un-Tag all to tick all Duties or Untick all duties. You will need a minimum of one Duty selected for this report to run

Date Range Select the range of dates to include information on the report from.

Save & Load Use the Save and Load feature to Save a template for this screen for re-use later. The Load button is for loading in settings that you have saved.

Continue Press Continue to open the report.

Sample Report

Below is a sample Roster Involvement Report.

Roster Participation Statistics Report		
17/10/2010 to 26/12/2010		
Allwright	Stephen	2 X 9:30am Traditional \ Door Duty 1 X 9:30am Traditional \ Music Team 4 X 9:30am Traditional \ Offering 1 X 11:00am Family \ Car Park 1 X 11:00am Family \ Door Duty 2 X 11:00am Family \ Worship Leader 2 X 7:00pm Evening \ Worship Leader
Allwright	Marion	2 X 9:30am Traditional \ Door Duty 1 X 9:30am Traditional \ Music Team 4 X 9:30am Traditional \ Offering
Angel	Peter	3 X 9:30am Traditional \ Door Duty 1 X 9:30am Traditional \ Music Team 3 X 9:30am Traditional \ Offering 1 X 11:00am Family \ Car Park 1 X 11:00am Family \ Door Duty

Duty

Duty Ordered By Person

The Duty Report does not take into consideration people actually rostered on a date/event/duty. It is only reporting what duties people are assigned to. A Sample report is shown below. This report is ordered and grouped by each individual.

Roster Duty Participation Report		
Allwright	Marion	9:30am Traditional \ Door Duty 9:30am Traditional \ Music Team 9:30am Traditional \ Offering
Allwright	Stephen	9:30am Traditional \ Door Duty 9:30am Traditional \ Music Team 9:30am Traditional \ Offering 11:00am Family \ Car Park 11:00am Family \ Door Duty 11:00am Family \ Worship Leader 7:00pm Evening \ Worship Leader
Angel	Belinda	9:30am Traditional \ Door Duty 11:00am Family \ Car Park 11:00am Family \ Piano 11:00am Family \ Worship Leader
Angel	Helen	9:30am Traditional \ Door Duty 9:30am Traditional \ Music Team 11:00am Family \ Car Park 11:00am Family \ Piano 11:00am Family \ Worship Leader

Duty Ordered by Duty

The Duty Report does not take into consideration people actually rostered on a date/event/duty. It is only reporting what duties people are assigned to. A Sample report is shown below. This report is ordered and grouped by each Duty.

Roster Duty Participation Report

9:30am Traditional \ Door Duty	Stephen Allwright, Helen Angel, Marion Allwright, Peter Angel, Belinda Angel, Brent Anglin, Katey Anglin, Mathew Anglin, Sophie Read, Ruth Chapman,
9:30am Traditional \ Overhead	Levi Anglin, Kerry Anglin, Big Ray Barton, Mum Barton, Ernie Barton, Karren Barton, Dot Blackeby, Helen Blackeby,
9:30am Traditional \ Music Team	Heather Blackeby, Frank Blackeby, Ernie Barton, Levi Anglin, Marion Allwright, Stephen Allwright, Peter Angel, Helen Angel, Katey Anglin, Peter Brown, Heather Brown, Joshua Brown, Adrien Chapman, Wendy Potter, Karren Potter, Anna Read, Andrew Read, Peter Morton, Sophie Read,
9:30am Traditional \ Piano	Heather Blackeby, Heather Brown, Frank Blackeby, Adrien Chapman, Peter Gray, Daryn Harris, Annita Harris, Joel Graham, Milton Potter, Nathan Potter, Marcus Read,
9:30am Traditional \ Worship Leader	James Gordan, Ross Graham, Janis Graham, Peter Gray, Leanne Leah, Kerry Lynch, Christopher Lynch, Allan Lynch, Michael Read, Alison Read, Anna Read,
9:30am Traditional \ Offering	Marion Allwright, Stephen Allwright, Peter Angel, Marcus Read, Andrew Read, Sophie Read,
9:30am Traditional \ Speaker	Michael Read, Karren Potter, Wendy Potter, Milton Potter, Nathan Potter, Alison Read, Sophie Read,

Teams

Teams Ordered by Person

The Teams Report does not take into consideration people actually rostered on a date/event/duty. It is only reporting what duties people are assigned to in a **Team**. A Sample report is shown below. This report is ordered and grouped by each individual.

Roster Team Report		
Allwright	Stephen	11:00am Family \ Car Park \ Car Park Team 1
Angel	Peter	11:00am Family \ Car Park \ Car Park Team 1 11:00am Family \ Car Park \ Car Park Team 2
Anglin	Kerryn	11:00am Family \ Car Park \ Car Park Team 3
Barton	Ernie	11:00am Family \ Car Park \ Car Park Team 3
Barton	Mum	11:00am Family \ Car Park \ Car Park Team 2
Chapman	Ruth	9:30am Traditional \ Door Duty \ Door Team 2 9:30am Traditional \ Door Duty \ Door Team 1 7:00pm Evening \ Door Duty \ Door Team 2
Morton	Judy	7:00pm Evening \ Music Team \ Music Team 2
Morton	Paula	7:00pm Evening \ Music Team \ Music Team 2 7:00pm Evening \ Music Team \ Music Team 3
Morton	Peter	9:30am Traditional \ Music Team \ Music Team 1 9:30am Traditional \ Music Team \ Music Team 2 9:30am Traditional \ Music Team \ Music Team 3 9:30am Traditional \ Music Team \ Music Team 4

Teams Ordered by Team

The Teams Report does not take into consideration people actually rostered on a date/event/duty. It is only reporting what duties people are assigned to in a **Team**. A Sample report is shown below. This report is ordered and grouped by each Team.

Roster Team Report	
9:30am Traditional \ Door Duty \ Door Team 2 (Leader : Katey Anglin Ph.0444-123456)	Sophie Read, Ruth Chapman,
9:30am Traditional \ Door Duty \ Door Team 1	Sophie Read, Ruth Chapman,
9:30am Traditional \ Music Team \ Music Team 1	Anna Read, Andrew Read, Peter Morton, Sophie Read,
9:30am Traditional \ Music Team \ Music Team 2	Anna Read, Andrew Read, Peter Morton, Sophie Read,
9:30am Traditional \ Music Team \ Music Team 3	Anna Read, Andrew Read, Peter Morton, Sophie Read,
9:30am Traditional \ Music Team \ Music Team 4	Anna Read, Andrew Read, Peter Morton, Sophie Read,
11:00am Family \ Car Park \ Car Park Team 1	Stephen Allwright, Peter Angel,
11:00am Family \ Car Park \ Car Park Team 2	Peter Angel, Mum Barton,
11:00am Family \ Car Park \ Car Park Team 3	Kerryn Anglin, Ernie Barton,

Absence

The Absence report will show all planned absences for people including any regular absence patterns programmed into the Absence area of Pastoral Care.

A sample Absence report is shown below.

Roster Absence Report		
Allwright	Stephen	
9:30am Traditional \ Door Duty		Not Available 1st, 3rd, 5th, Sunday of each month and Absent Every 2 weeks for 1 week this person is away on Sunday, starting from 11/12/2012
Anglin	Brent	
9:30am Traditional \ Door Duty		Not Available between 01/01/2004 to 31/01/2004,
Anglin	Katey	
9:30am Traditional \ Door Duty		Not Available 1st, 3rd, Sunday of each month
Anglin	Levi	
9:30am Traditional \ Overhead		Not Available 1st, 3rd, Sunday of each month
Anglin	Mathew	
9:30am Traditional \ Door Duty		Not Available Absent Every 3 weeks for 1 week this person is away on Sunday, starting from 03/09/2003

Association

The association report shows all associations for the selected events.

A sample report is shown below.

Roster Association Report	
Allwright	Stephen
9:30am Traditional \ Door Duty \ To Associate with 9:30am Traditional \ Door Duty \ Peter Angel	
9:30am Traditional \ Door Duty \ Not Associate with 9:30am Traditional \ Door Duty \ Helen Angel	
9:30am Traditional \ Door Duty \ Not Associate with 9:30am Traditional \ Door Duty \ Sophie Angel	
Angel	Belinda
9:30am Traditional \ Door Duty \ To Associate with 9:30am Traditional \ Door Duty \ Ruth Chapman	
Angel	Helen
9:30am Traditional \ Door Duty \ Not Associate with 9:30am Traditional \ Door Duty \ Stephen Allwright	
Angel	Peter
9:30am Traditional \ Door Duty \ To Associate with 9:30am Traditional \ Door Duty \ Stephen Allwright	
9:30am Traditional \ Door Duty \ Not Associate with 9:30am Traditional \ Door Duty \ Brent Anglin	
Anglin	Brent
9:30am Traditional \ Door Duty \ Not Associate with 9:30am Traditional \ Door Duty \ Peter Angel	
Chapman	Ruth
9:30am Traditional \ Door Duty \ To Associate with 9:30am Traditional \ Door Duty \ Belinda Angel	
Read	Sophie
9:30am Traditional \ Door Duty \ Not Associate with 9:30am Traditional \ Door Duty \ Stephen Allwright	

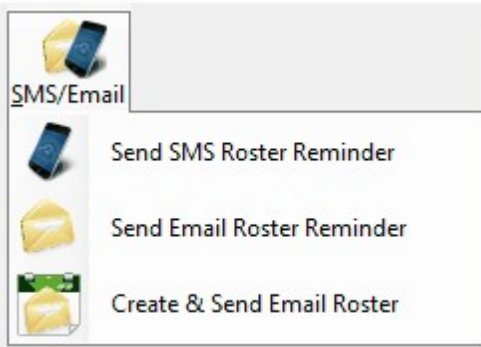
SMS / EMAIL



The SMS/Email option is available from the Roster Toolbar. Pressing the SMS/Email icon will open up the following options.



Click on each option below for full details.



Send SMS Roster Reminder

Using SMS to remind people about an upcoming Rostered Event is a really simple process, and can be seen as a great encouragement. Don't forget to keep your messages short and friendly!



Click on each part of the SMS reminder window below to learn more about this feature.

SMS Reminder
Close Send Tracking Queue Filters Spell Save Load Help

Event

- 9:30am Traditional
- 11:00am Family
- 7:00pm Evening

Duty

- 9:30am Traditional \ Door Duty
- 9:30am Traditional \ Overhead
- 9:30am Traditional \ Music Team
- 9:30am Traditional \ Piano
- 9:30am Traditional \ Worship Leader
- 9:30am Traditional \ Offering

Date

26/12/2013	21/11/2013	17/10/2013
19/12/2013	14/11/2013	10/10/2013
12/12/2013	07/11/2013	03/10/2013
05/12/2013	31/10/2013	26/09/2013
28/11/2013	24/10/2013	19/09/2013

Rostered On WITH an Mobile Number Load Hidden Mobiles

Tag	Surname	Given	Mobile
<input checked="" type="checkbox"/>	Allwright	Stephen	04123
<input checked="" type="checkbox"/>	Allwright	Marion	04123
<input checked="" type="checkbox"/>	Angel	Peter	04123
<input checked="" type="checkbox"/>	Angel	Belinda	04123
<input checked="" type="checkbox"/>	Anglin	Levi	04123
<input checked="" type="checkbox"/>	Barton	Ethel	04123
<input checked="" type="checkbox"/>	Barton	Ernie	04123
<input checked="" type="checkbox"/>	Blackebv	Frank	04123

Rostered On WITHOUT an Mobile

Surname	Given

Est Characters: 128 Est Txt 1 Estimate Cost \$0.88

Hi [Given], Thanks Heaps for the work you do at Belling North Baptist.
You are rostered on [Roster_Event_Duty] on [Roster_Date].

Smsglobal Status
Connection Established

Return ID
123456789

Given

Surname

Date 14

Event-Duty

Enable SMS Scheduling

Thursday . 4 April 2013 07:04 PM

Roster SMS Toolbar

Shown below are the icons on the Roster SMS Toolbar, along with descriptions of each function.



Send your message to all selected people. You can choose to send all to the [SMS Queue](#) and dispatch immediately, or you can Send to the [SMS Queue](#) for dispatch later.



Access the Spell Checker Settings



Turn on SMS Tracking for the message you are about to send. See [Tracking](#) for more information



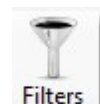
Save the currently composed SMS message as a template for re-use.



See the [SMS Queue](#) topic for full details on how the SMS queue manages the sending of SMS messages.



Load a previously saved SMS message template for re-use.



Use [Filters](#) to narrow down even further the list of people you want to send an SMS reminder to.

Select Event

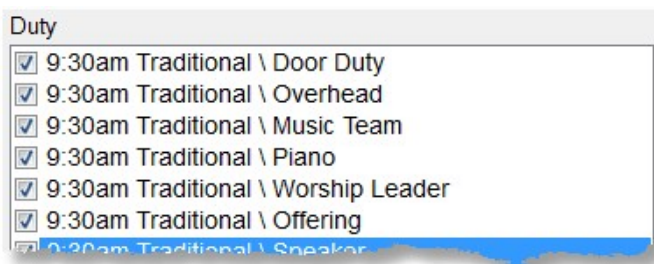
To select people to receive an SMS reminder regarding a commitment for a Rostered Duty, you must first select the Event(s) that you want to send reminders out to.

Note: As people may well be rostered on for more than one duty in one day or even at one event, Pastoral Care will automatically combine the reminders into 1 message send.



Select Duties

Select the duties that you want to send reminders for.



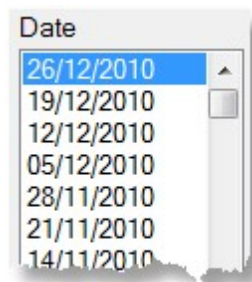
Tag / Untag All

Use the Tag / UnTag All buttons to select all Duties or de-select all duties.



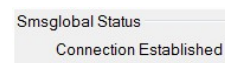
Select Date

Pastoral Care will only send reminders for one date at a time. It is recommended that if using this feature, you choose to remind people close to the event so that it is fresh in their mind.



SMS Status

This area shows the current status of your SMS Global connection. If an error is displayed here, you will not be able to send messages.



Return ID

This is the default return ID set up in Global Settings, or in Security if you are using unique logins for different users.

Return ID
12345678

Load Hidden Mobiles

Tick this option to load in and use Hidden Mobiles if needed.

Load Hidden Mobiles

Select People

Select the people that you want to select an SMS reminder about a roster event / duty they are required for.

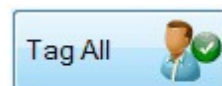
Note, only people with a Mobile Number are loaded and available for selection.

Rostered On WITH a Mobile Number

Tag	Surname	Given
<input checked="" type="checkbox"/>	Allwright	Stephen
<input type="checkbox"/>	Allwright	Marion
<input type="checkbox"/>	Angel	Peter
<input type="checkbox"/>	Angel	Belinda
<input type="checkbox"/>	Anglin	Levi
<input type="checkbox"/>	Barton	Mum

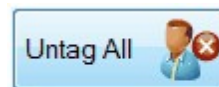
Tag All

Tag all people in the list to receive a text message reminder.



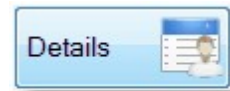
Untag All

Untag all people in the list. By default, all people are tagged to receive a text message.



Details

Press the details button to display the following Details Window.



This window shows to the **Mobile to send reminder to**, and allows you to select another phone number and press Replace to swap the selected number to another number.

SMS Roster Details

Rostered On Duties for...
Allwright Stephen

26/12/2010\9:30am Traditional\Offering

Mobile to send Reminder to...
0400297025 (Personal Mobile)

Alternate Mobile available on family file

Phone Number	Type	Owner	Hidden
054-33-5478	Family Phone	Family Phone	No
0400297025	Personal Mobile	Stephen	No
018-998725	Business Phone	Stephen	No
041234567890	Personal Mobile	Marion	No
054-229876	Business Phone	Marion	No

Help ? Replace Close

Compose Message

Hi [Given], here is your Roster Reminder >>> [Roster_Reminder_Details] Thanks heaps for your help at church :)

Type your reminder message in the supplied space. Remember to try and make your message both short and encouraging. You can personalise the message by inserting fields into the message. See [Insert Fields](#) for more information on this.

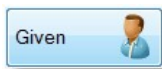
The sample message above includes a field for the Given Name and Roster Details in the message.

It would read like the following:

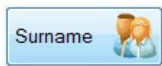
Hi John, here is your Roster Reminder>>> 1/5/2013 Family Worship / Piano Thanks Heaps for your help at church:)

Insert Fields

The following fields are available for inserting into a SMS Roster Reminder.



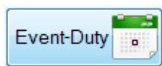
Insert a person's Given Name, or their preferred name if one exists in their family file.



Insert a person's Family Surname, or Individual Surname if one exists in their family file



Insert the date that the person is needed on.



Insert a description of the Duty and Event a person is required for.

Schedule Message



Use the Scheduler Feature to set the date and time that you want the message to be sent. Important Information, If using the scheduler, you should use the Dispatch Immediately after sending to the Queue option, or review queue shortly after sending and then push the messages to SMS global.

Pastoral Care does not handle the schedule, they message will be sent to SMS global first and await the allotted time to leave their system for the recipient.

Send Email Roster Reminder

Using Email to remind people about an upcoming Rostered Event is a really simple process, and can be seen as a great encouragement. Don't forget to keep your messages friendly!



Click on each part of the Email reminder window below to learn more about this feature.

Close Send Tracking Queue Filters Spell Save Load Help

Event

- 9:30am Traditional
- 11:00am Family
- 7:00pm Evening

Duty

- 9:30am Traditional \ Door Duty
- 9:30am Traditional \ Overhead
- 9:30am Traditional \ Music Team
- 9:30am Traditional \ Piano
- 9:30am Traditional \ Worship Leader
- 9:30am Traditional \ Offering

Date

<input checked="" type="checkbox"/> 26/12/2013	<input type="checkbox"/> 21/11/2013	<input type="checkbox"/> 17/10/2013
<input type="checkbox"/> 19/12/2013	<input type="checkbox"/> 14/11/2013	<input type="checkbox"/> 10/10/2013
<input type="checkbox"/> 12/12/2013	<input type="checkbox"/> 07/11/2013	<input type="checkbox"/> 03/10/2013
<input type="checkbox"/> 05/12/2013	<input type="checkbox"/> 31/10/2013	<input type="checkbox"/> 26/09/2013
<input type="checkbox"/> 28/11/2013	<input type="checkbox"/> 24/10/2013	<input type="checkbox"/> 19/09/2013

Rostered On WITH an Email Address Load Hidden Emails

Tag	Surname	Given	Email
<input checked="" type="checkbox"/>	Allwright	Stephen	stephen
<input checked="" type="checkbox"/>	Allwright	Marion	busines
<input checked="" type="checkbox"/>	Angel	Peter	stephen
<input checked="" type="checkbox"/>	Angel	Belinda	stephen
<input checked="" type="checkbox"/>	Anglin	Levi	Brentl@

Rostered On WITHOUT an Email Address

Surname	Given
Graham	Joel
Lynch	Allan
Potter	Milton

Subject:

Arial 10px **B** *I* U 100%

Hi [Given], thanks for the great effort you put into helping us at church. You are rostered on the [Roster_Date] for [Roster_Event_Duty]. Please contact your roster team leader or the church office if you are unable to make this time.

Given

Surname

Date

Event-Duty

Roster Email Toolbar

Shown below are the icons on the Roster Email Toolbar, along with descriptions of each function.



Send your message to all selected people. You can choose to send all to the [Email Queue](#) and dispatch immediately, or you can Send to the [Email Queue](#) for dispatch later.



Access the Spell Checker Settings



Turn on Email Tracking for the message you are about to send. See [Tracking Email](#) for more information



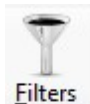
Save the currently composed Email message as a template for re-use.



See the [Email Queue](#) topic for full details on how the Email queue manages the sending of Email messages.



Load a previously saved Email message template for re-use.



Use [Filters](#) to narrow down even further the list of people you want to send an Email reminder to.

Select Event

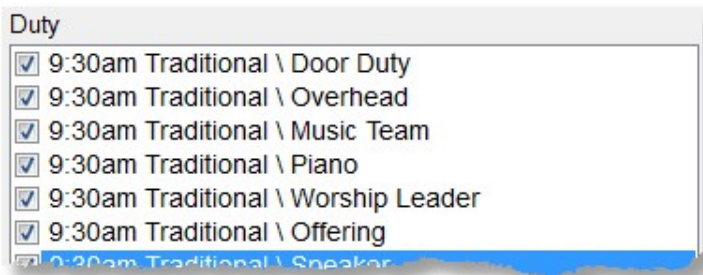
To select people to receive an Email reminder regarding a commitment for a Rostered Duty, you must first select the Event(s) that you want to send reminders out to.

Note: As people may well be rostered on for more than one duty in one day or even at one event, Pastoral Care will automatically combine the reminders into 1 message send.



Select Duties

Select the duties that you want to send reminders for.



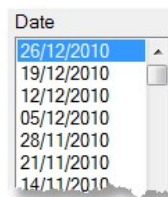
Tag / Untag All

Use the Tag / Untag All buttons to select all Duties or de-select all duties.



Select Date

Pastoral Care will only send reminders for one date at a time. It is recommended that if using this feature, you choose to remind people close to the event so that it is fresh in their mind.



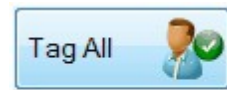
Select People

Select the people that you want to send a roster reminder to. You can tick the Load Hidden Emails to allow Pastoral Care to also load in email address information that has been ticked in the family files as hidden.

Rostered On WITH a Email Address			<input type="checkbox"/> Load Hidden Emails
Tag	Surname	Given	
<input checked="" type="checkbox"/>	Allwright	Stephen	
<input checked="" type="checkbox"/>	Allwright	Marion	
<input checked="" type="checkbox"/>	Angel	Peter	
<input checked="" type="checkbox"/>	Angel	Belinda	
<input checked="" type="checkbox"/>	Anglin	Katey	

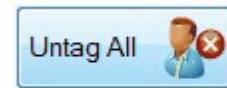
Tag All

Tag all people in the list to receive an email message reminder.



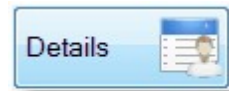
Un Tag All

Untag all people in the list. By default, all people are tagged to receive an email message.



Details

Press the details button to display the following Details Window.



This window shows to the **Email Address to send reminder to**, and allows you to select another email address and press Replace to swap the selected email address to another address.

Email Roster Details ✖

Rostered On Duties for...
Allwright Stephen

26/12/2010 \ 9:30am Traditional \ Offering

Email Address to send Reminder to...
stephen@spirit.com.au (Personal Email)

Alternate Email address available on family file

Email Address	Type	Owner	Hidden
stephen@spirit.com.au	Personal Email	Stephen	No
marion@thenet.com	Business Email	Marion	No

Help
Replace
Close

People without emails

This list shows people who are rostered on with the selections you have made, but they do not have an email address.

Surname	Given
Graham	Joel
Jones	Wendy
Jones	Ryan
Jones	Jill
Kean	Steve

Compose Email Message

Type your reminder message in the supplied space. Remember to try and make your message both short and encouraging. You can personalise the message by inserting fields into the message. See [Insert Fields](#) for more information on this.

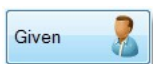
We have included below a sample email message and subject. Standard font controls are included to allow you to use different fonts and font styles.

Hi [Given], thanks for the great effort you put into helping us at church. You are rostered on the [Roster_Date] for [Roster_Event_Duty]. Please contact your roster team leader or the church office if you are unable to make this time.

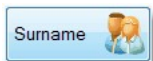
The screenshot shows a vertical list of fields on the right side of the email composition window. Each field has a small icon representing its type: a person for 'Given', two people for 'Surname', a calendar for 'Date', and a calendar with a checkmark for 'Event-Duty'. The 'Date' field shows the number '14'.

Insert Fields

The following fields are available for inserting into an Email Roster Reminder.



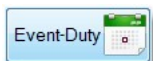
Insert a person's Given Name, or their preferred name if one exists in their family file.



Insert a person's Family Surname, or Individual Surname if one exists in their family file



Insert the date that the recipient is required



Insert the Event and Duty Description.

CarePlus

CarePlus is a feature designed to assist you in Legislative Compliance for contact with children in your church programs. All Australian States and Territories have legislation governing the situations and people that come into contact with children on a regular / formal basis.



Click on each of the links below for more information on this area.

[Introduction](#)

[Setup CarePlus](#)

[CarePlus Security](#)

[Starting Care Plus](#)

[CarePlus Main Window](#)

Introduction

More and more, Churches and Community Groups alike are being asked to be more accountable to authorities on the issue of providing a safe and caring environment for the children in their care. Sadly, even churches are not always a safe place for our children, and it is the Governments of today that are putting more and more restrictions and controls on people who have contact with children away from the Parents or Guardians that normally look after them.

Editors Comments

While CarePlus will help your church become compliant with Government Legislation, it still will not on it's own automatically provide you with a "safe place" for your children. We encourage each church who uses CarePlus to not only comply with Government Legislation and Denominational Guidelines, but to also take a pro-active approach to childhood safety at church.

By having sensible procedures, you can greatly increase the security of children in your care. Some things to consider in addition to legislative requirements could be:

- Do not have children with leaders behind closed doors
- Install Glass Panel doors if closed doors are needed for noise control
- Strictly enforce TWO approved adults in contact with children at all times
- Strictly enforce TWO approved adults in contact with children when taking toddlers to a toilet

These are simple and logical steps to take, however it is surprising how many churches do not even have these basic guidelines in place. These comments are the opinion of the Editor of the Pastoral Care Manual, who has had extensive experience in child / youth programs in both the secular and church arenas. Remember, being compliant with Government Legislation and having Police Checks etc on all people **Will Not Make Your Church a SAFE PLACE** for children. More needs to be done!

Compliance Care!

Be careful when applying Government Regulations to your church. In some cases, people who do not actually “work” with children, but have some contact with them may also need to be managed with CarePlus. Even if you have a musician come into “Sunday School” to play for a few songs, and then they leave, they may also need to have Government clearance to do that task.

There are many rules and regulations in these areas, and some States are more complex than others. Seek information from your denominational heads / organisation, or other larger churches in your area if you are struggling to understand your legal obligations in this area.

Setting Up CarePlus

Naturally, this area needs lots of thought in the setup process to be sure that you are recording the information that is useful for your denominational and legislative recording needs. See the [Setup CarePlus](#) area for more details on configuration of CarePlus.

Security

Since the nature of information stored within the CarePlus module is extremely sensitive, extra precautions are taken to secure this data. Access to the CarePlus information can only be assured if correct passwords are used. Therefore good password security practices should be used in your church for this area in particular.

If you already have Pastoral Care security enabled, then a second password is required to access the CarePlus information. The second password is used exclusively in the CarePlus module to set degrees of Access to all areas of the CarePlus module. This extra layer of security empowers the church to comprehensively maintain their data with the secure knowledge that only correctly trained and authorized people are editing and viewing CarePlus information. See [CarePlus Security](#) for information on configuration of Security for CarePlus feature levels, and see also [Setup Security](#) for information on general Pastoral Care security features.

Legislative Requirements

Information presented here is "as is" and accurate to the best of our knowledge at the time of publication.

See <http://www.justice.vic.gov.au/workingwithchildren/> for more information.

Australian Capital Territory

Under new rules in the ACT, people who work with children and vulnerable adults must register with a Statutory Screening Unit. Under the Working with Vulnerable People (Background Checking) Bill 2010 it is expected that all employees and volunteers who provide regulated services to children will be checked in the first year of the new law's operation. For more information see http://www.ors.act.gov.au/community/working_with_vulnerable_people

New South Wales

The NSW Commission for Children and Young People is responsible for the Working with Children Check, which helps determine whether people are suitable to work in child related employment.

This checklist aims to create workplaces where children are safe and protected, and where the people who work with children are appropriately screened. For information on New South Wales requirements, go to <https://check.kids.nsw.gov.au/>

Northern Territory

In the NT the law has recently changed and from 1 March 2011 it will be mandatory for people who have contact or potential contact with children to hold a Working with Children Clearance Notice and an Ochre Card.

SAFE NT administers the clearance procedure which involves an employment and criminal history check. People who have previously had a Criminal History Check to work with children will still be required to apply for the Working with Children Clearance if they work certain specified areas of employment.

For more information on the requirements visit www.workingwithchildren.nt.gov.au or contact SAFE NT on 1800 SAFENT (1800 723 368).

Queensland

In Queensland people working or volunteering with children need to hold a Blue Card.

The Commission for Children and Young People and Child Guardian is responsible for administering and conducting criminal history checks on people who want to work with children to determine whether or not they are eligible to hold a Blue Card. See <http://www.ccypcg.qld.gov.au/index.aspx> for more information.

South Australia

South Australia Under the Children's Protection Act (Section 8B) people in SA who work in jobs which require regular contact with children are required to obtain police clearance before they commence employment.

A National Police Certificate application form is available from the South Australian Police Department.

Tasmania

Currently there are no legal requirements for people working with children to undertake a police check in Tasmania, however, organisations which require employees and/or volunteers to work with children may have their own policies in this regard.

In 2005 the Commissioner for Children Tasmania released a consultation paper discussing proposals for the Government to introduce screening procedures for Tasmanian organisations who want to employ people to work with children.

Victoria

The Victorian Government has introduced the Working with Children Check, which is compulsory for people who wish to work with or volunteer with children. The check seeks to protect children from harm by requiring people to undertake a criminal history check before they start work in an organisation.

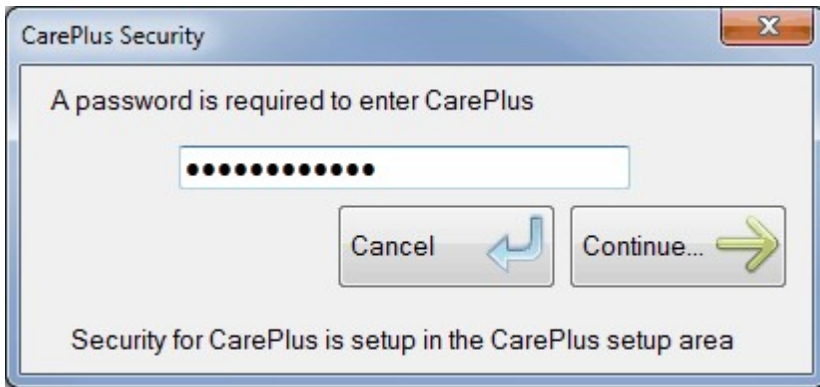
Western Australia

In Western Australia a Working with Children Check is compulsory for people who carry out child-related work in Western Australia. The check aims to protect children by deterring people from working with children when they have criminal records that indicate they may harm children; and by preventing people with such records from gaining positions of trust in paid and voluntary work with children.

Starting Care Plus

You can start CarePlus from the Church Tab on the Main Menu. Simply double click CarePlus on the Church Tab to load the [CarePlus Main Window](#). When prompted, enter your CarePlus security password. This password not only gives you access to CarePlus, but it also sets all the program features you will have access to, and what you are authorised to do in CarePlus.

The CarePlus Password Login



CarePlus Main Window

Shown below is the CarePlus main window. It is shown after Loading people in for working on. This area needs a Load first before it appears to be able to be used. There are 3 different types of Load options when loading in people. See [Load](#) for more information on loading people into CarePlus for working with. See also [Add / Edit Records](#) for information on adding data to selected people in this area.



Click on each area of the CarePlus window below to learn more.

The screenshot shows the CarePlus application window for 'Belling South Baptist INC. (Pastoral Care Training Church)'. The interface includes a menu bar (File, Help), a toolbar with icons for Close, Add/Edit Records/Reports, Load, Process, Filters, Sort, Format, Delete, Doc's, Schedule, ToolBox, and Help. A dropdown menu for 'Compliance Type' is set to 'Blue Card'. On the left, a list of names is displayed, with 'Allwright Stephen' selected. The right pane shows details for this person, including Risk Rating (Medium), Current Status (Current), and Review (Applied For). A 'Procedure' section has three checked items: Certificate Received, Interview Completed, and Police Check Done. Below this is an 'Event' table with one entry: 'Expiry Date of Compliance' on '01/09/2013'. At the bottom, a 'Comment' table shows 'Compliance Receipt Number' with description 'SHE003456'.

Event	Date
Expiry Date of Compliance	01/09/2013

Comment	Description
Compliance Receipt Number	SHE003456

Compliance Type

Before entering any information in this area, be certain that you select the correct Compliance Type to work with. Most churches will have only one compliance type, and that should match your state / government legislative title for the State / Territory your church resides in.

Compliance Type

CarePlus Toolbar

The CarePlus toolbar is shown below.

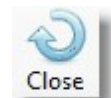


Click on each area for more information.



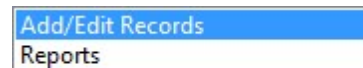
Close

Exit the CarePlus area. All changes will be saved automatically.



Menu List

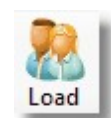
Choose to either Add / Edit CarePlus records, or run CarePlus Reports.



See [Add / Edit Records](#) and [CarePlus Reports](#) for more information on each area.

Load

Press the Load button to load in selected people into CarePlus. The standard Pastoral Care [Filters](#) are available so you can select people by different status's or groups etc, or you can use any of the Load Options offered after pressing the Load button on the CarePlus toolbar.

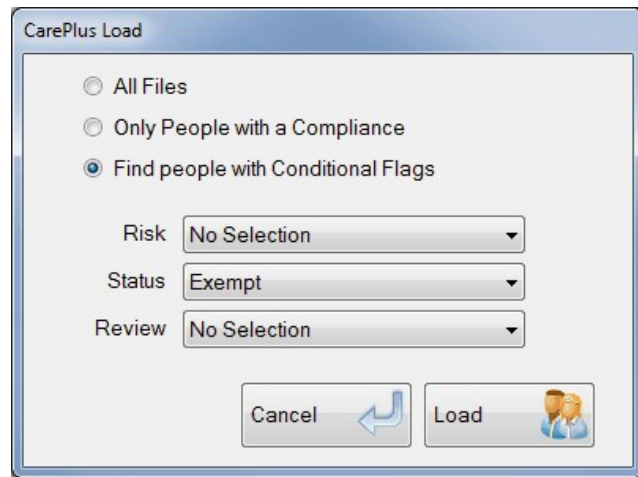


All Files

Choose this option to load in all church people. This is also affected by any Filters. For example, you could load in all Leaders using the filter for Leaders (if you have a status of Leaders) to start working with with the selected range of people.

Only People with a Compliance

Choose this option to load in only people with a compliance records. This will load in all people with information already recorded in CarePlus against their name. This option is ideal for regular maintenance and reviewing of people with a CarePlus records.



Find People with Conditional Flags

The sample window above shows us about to load in all people with a status of Exempt. And of the Risk, Status and Review options can be used for filtering under the selection of Conditional Flags.

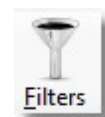
Process

Press the Process button to run a selected report.



Filters

Use any of the standard Pastoral Care [Filters](#) to restrict people loading into CarePlus, or being outputted to and of the [CarePlus Reports](#).



Sort

Use any of the standard Pastoral Care [Sort](#) options for some of the CarePlus reporting options.



Format

Use the standard Pastoral Care report [Format](#) options in some of the CarePlus reports.



Delete

Delete all CarePlus records for the selected person.

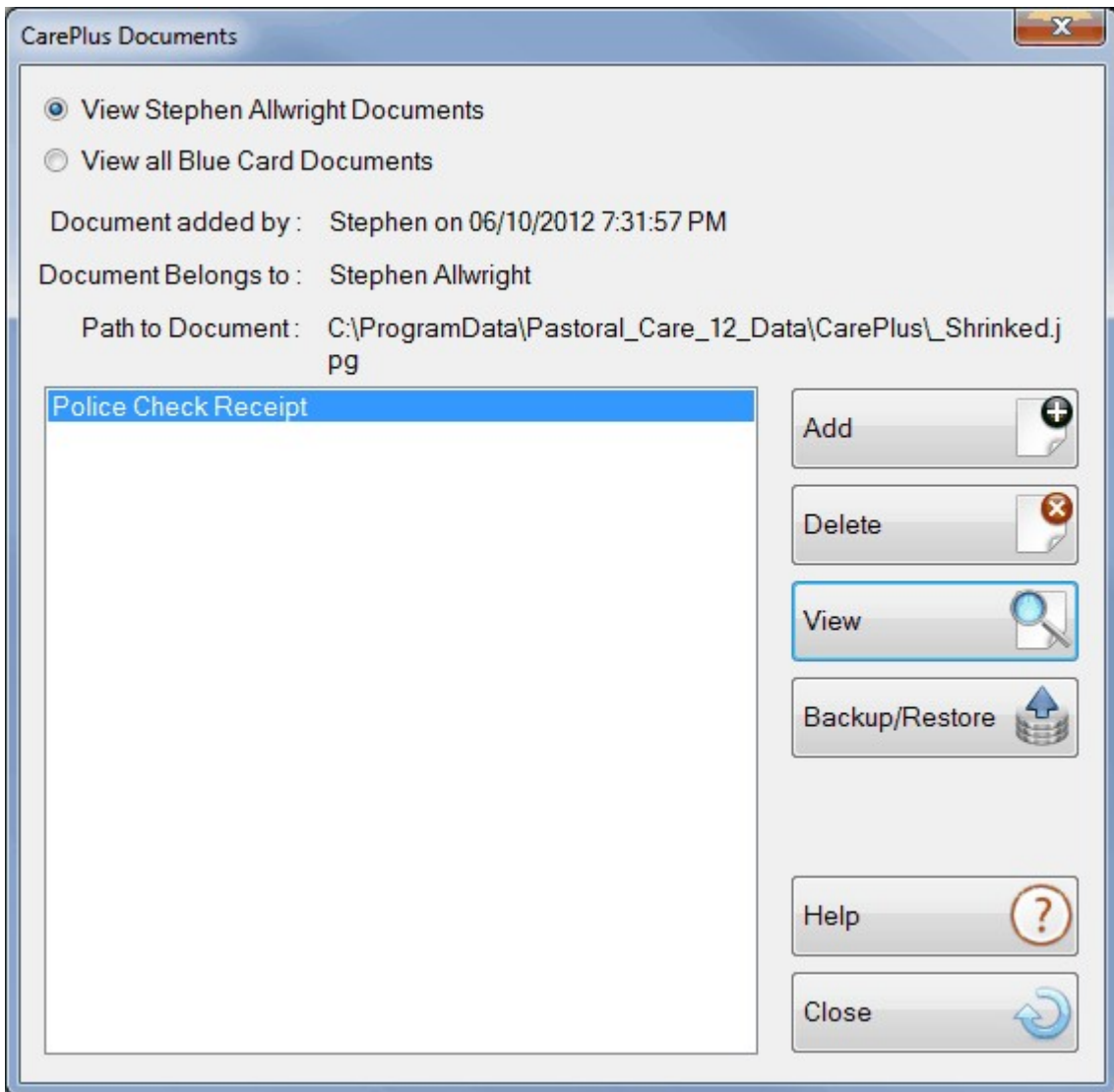


Doc's

The Doc's (short for Documents) allows you to add supporting documents to a person's individual CarePlus records.



Click on each area below to learn more about the Doc's feature.



Document View Options

View Stephen Allwright Documents
 View all Blue Card Documents

Document added by : Stephen on 06/10/2012 7:31:57 PM

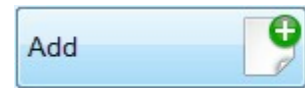
Document Belongs to : Stephen Allwright

Path to Document : C:\ProgramData\Pastoral_Care_12_Data\CarePlus_Shrined.jp
pg

Choose to see a list of all documents, or only those for the currently selected person. Note the Path to Document. When a document is saved to CarePlus, the original file is left in its original location, and a copy of it is made in the Pastoral Care data path.

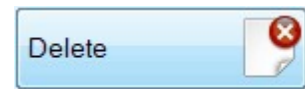
Add

Press this to add a Document to the currently selected person. You will be prompted to provide a document title, this should be short a descriptive as to the reason for the document. You will then be prompted to browse to and select the document to be attached to the selected person under the document title.



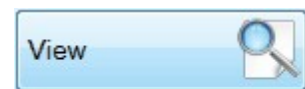
Delete

Delete the selected document.



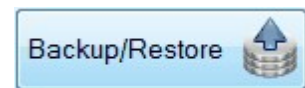
View

View the selected document. Note, this will only work if your Windows Programs have an association with that document type. By Default, all documents created on your computer should be associated with a program. If the file will not open to view, then you may need to install additional software to view that file.



Backup / Restore

Documents stored in CarePlus are not backed up by the Pastoral Care backup utility. Please use this Backup feature to backup your Documents into a single file.



Schedule

The CarePlus area has a built in Alarm Clock! This can be set to remind you when people's Compliance Certificates, Police Checks etc are due for renewal. Simply select the Schedule 1 or 2, and activate the reminder for the Selected Compliance Type and Event. A sample schedule is shown below.

Important Note

When setting the number of days, please take into consideration how long it takes a person to have that compliance renewed. For example, a Police Check might take 60 days to get renewed, there would be no point setting a reminder for 14 days on that event!

CasrePlus Schedule

When Pastoral Care starts check the following schedules

Activate Schedule 1

Compliance Type

Event

Reminder within Days

Display message WITHOUT names
 Display message WITH names

Activate Schedule 2

Compliance Type

Event

Reminder within Days

Display message WITHOUT names
 Display message WITH names

Help Close

Toolbox

Use the standard Pastoral Care [Toolbox](#) for quick access to useful areas.



Add / Edit Records

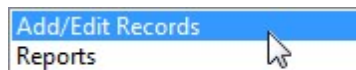
The CarePlus area of Add / Edit Records is the area that you can record information against individuals that you are interested in for Working With Children legislation. Information such as but not limited to:

- Procedures such as Police Checks completed etc
- Status of a compliance certificate
- Notes on the individual
- Information on Applications and Referee's etc
- Recording of Incidents

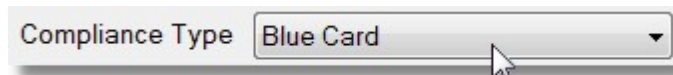
Adding a Record

Follow these simple steps to Add or Edit a record in CarePlus.

Step 1 Select Add Edit Records from the menu list in CarePlus



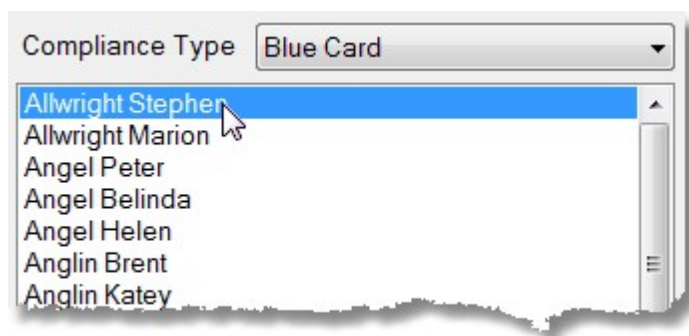
Step 2 Select the Compliance Type from the Compliance Type selection list. In most cases, your church will only have one compliance type to work with.



Step 3 Use the Load options to load in people that you want to work on

See [Load](#)

Step 4 Select a person from the list of people loaded that you wish to edit or add information to



Step 5 Make the changes to each or any of the areas listed below for the selected person.

Areas for Editing and Adding information to



Shown below are the 6 area tabs for adding information to. Note that the selected person's name is above the tabs.

Click on each tab below for full details of each of these 6 areas.

CarePlus Details for Stephen Allwright

Details

Notes

Application

Referee

Incidents

Audit

Areas Highlighted with Data

Notice that some tabs are coloured with a highlight colour? The tabs that are highlighted with a background colour are those tabs that have information saved against the selected person for that area. Below, you can see that Peter Angel only had information saved on the Details tab.

CarePlus Details for Peter Angel

Details

Notes

Application

Referee

Incidents

Audit

Details

The Details Tab shows information and allows editing and adding of information on the following areas:

- Risk Rating Assign a risk rating to a person. You can setup your risk ratings in the CarePlus setup area under [Risk](#)
- Current Status Assign a Status for a person's Compliance Certificate / Working With Children Card. You can setup your own Status Categories in the CarePlus setup area under [Status](#)
- Review Assign a Review stage for a status of any Review Processes that you might use for managing people in your CarePlus program. You can setup your own Review categories in the CarePlus setup area under [Reviews](#)
- Procedure Record any procedural steps that are followed for a person to apply for a Working With Children certificate etc. You can setup your own Procedure categories in the CarePlus setup area under [Procedure](#)
- Events Record any significant dates against events, such as Police Checks, Compliance Dates etc. You can setup your own Procedure categories in the CarePlus setup area under [Events](#)

- Comments Fill any small comments in against comment categories setup. Such as Receipt Numbers etc. Setup your Comment Categories in the CarePlus setup area under [Comments](#)

Details Window



Click on each part of this window for more information on each section of the CarePlus Details tab. (Note the other Tab Names have been hidden for clarity, they are normally all displayed)

Details

Risk Rating

Current Status

Review

Procedure

Certificate Received
 Interview Completed
 Police Check Done

Click on the Date cell to add/edit information

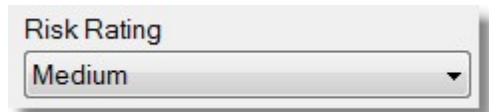
Event	Date
Expiry Date of Compliance	01/01/2009

Click on the Description cell to add/edit information

Comment	Description
Compliance Receipt Number	SHE003456

Risk Rating

Risk Ratings are a rating you give to a person that your CarePlus Team, or leadership team has assigned to a person who has applied for a position to work in children's ministry.

A screenshot of a web form element. It features a label 'Risk Rating' above a dropdown menu. The dropdown menu is currently displaying the word 'Medium' and has a small downward-pointing arrow on its right side.

It shows due diligence to have people rated appropriately, and it is also a wise decision to have documented guidelines on what a Risk Rating means, as just 1 or 2 words is not enough to fully appreciate this type of information stored against an individual person. Below is a suggested setup for Risk Rating, and some suggested descriptions of what each might mean.

Remember, it is important that the church not only "does the right thing" in managing this area, but the church should be able to show to an auditor or investigator if needed the documentation and controls, including definitions of terms to prove that the church is doing what they say they are!

- **Unknown** An unknown rating does not imply that a person is not suitable. This means that the risk associated with employing them in children's ministry is undetermined. Perhaps they are new to church and you have not received any references from other churches yet.
- **Low** Low Risk is usually meant to be "No Risk". The person assigned to this rating should have years of experience with children, and have no record of any problems or questions about their character that might raise your risk level.
- **Medium** A medium risk is a person with a good record with you, but you have perhaps some doubts about their intentions, or you have hear unsubstantiated rumors about their character that leaves you with some doubt about their suitability to work with children.
- **High** A High Risk rating should mean that the person in question has had more than a rumor levied against them, and has in fact being involved in some soft of incident at another church, or your church. Recording of this fact will ensure that this person is never assigned to working with children in your care.
- **Very High** A Very High Risk rating should mean that the person in question has had more than a rumor levied against them, and has in fact being involved in some soft of incident at another church, or your church. In addition to this, they may have a police record that relates to children, and have perhaps being refused a clear police check. Recording of this fact will ensure that this person is never assigned to working with children in your care.

Current Status

The Current Status lets to set for the selected person, a status of their Working with Children card, Compliance Certificate, Blue Card etc.

Current Status
 Current

Review

If you use regular review procedures for each of your people working in Children's ministry, then you can record the stage of the current review in progress here.

Review
 Applied For

Procedure

Tick any procedures that you have setup in CarePlus that have been completed for the current person.

Certificate Received
 Interview Completed
 Police Check Done

Event

Event	Date
Expiry Date of Compliance	01/01/2009

For any set up Events, you can enter a date for that event. Dates (if set forward) can be used as reminders by using the [Schedule](#) feature.

Comment

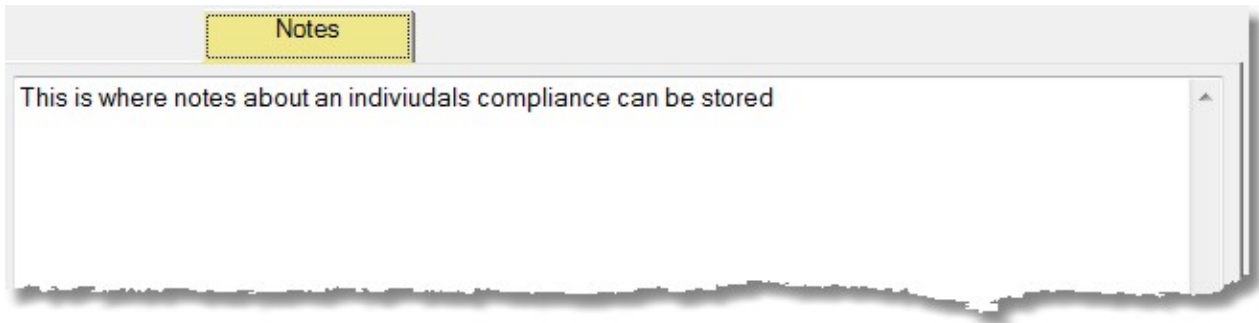
Comment	Description
Compliance Receipt Number	SHE003456

Comments can accept a small number of free hand characters intended for recording information like Receipt Numbers, Registration Numbers etc.

Notes

Enter any free form notes against the selected person.

(Note the other Tab Names have been hidden for clarity, they are normally all displayed)



Application

Record a Date, approval status and some notes in relation to a person application to work with children at your church.

(Note the other Tab Names have been hidden for clarity, they are normally all displayed)

Click on the [Edit / New](#) button to edit the selected record, or to create a new Application Record.

Edit / New

Make and changes to the selected Application Record, or Fill in all details if you are creating a NEW application record.



Delete an application record by pressing Delete.



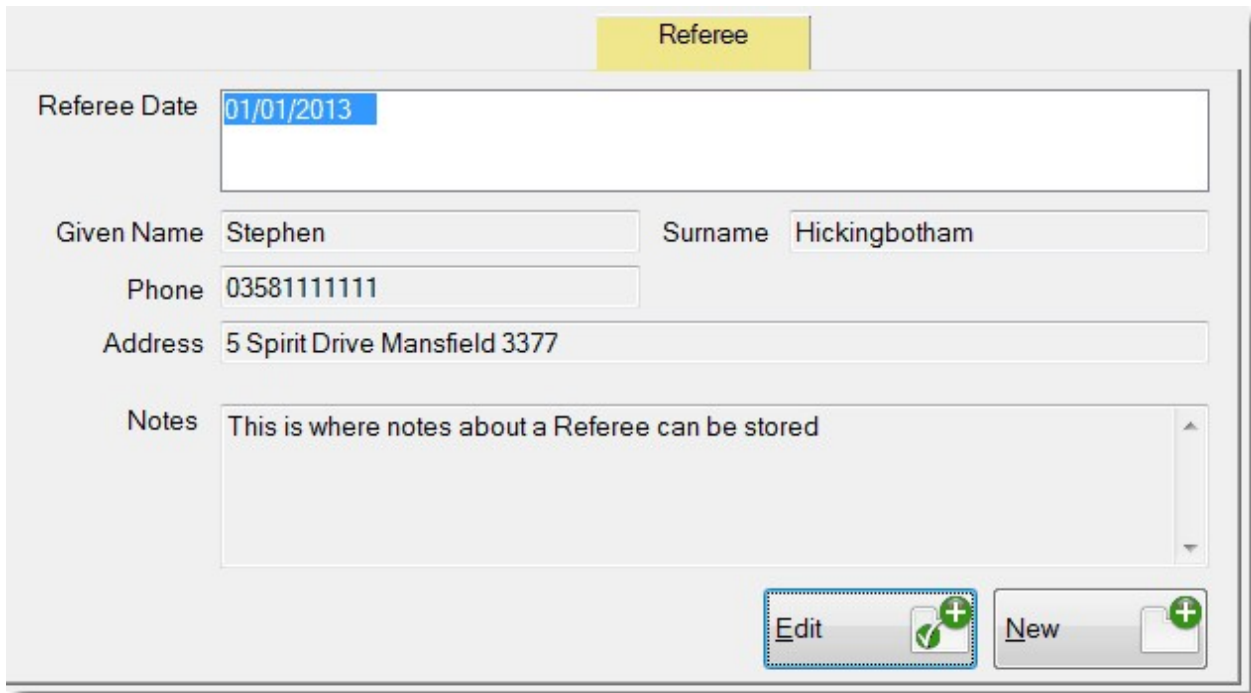
Press Save to save any changes made to this record

Referee

Record a Date, Referee Name and contact information along with some notes about the reference.

(Note the other Tab Names have been hidden for clarity, they are normally all displayed)

Click on the [Edit/New](#) button to edit the selected record, or to create a new Referee Record.



The screenshot shows a web-based form titled "Referee" with a yellow header. The form contains the following fields:

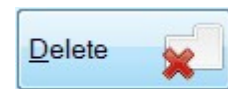
- Referee Date:** A text box containing "01/01/2013".
- Given Name:** A text box containing "Stephen".
- Surname:** A text box containing "Hickingbotham".
- Phone:** A text box containing "0358111111".
- Address:** A text box containing "5 Spirit Drive Mansfield 3377".
- Notes:** A large text area containing "This is where notes about a Referee can be stored".

At the bottom right of the form, there are two buttons: "Edit" (with a green checkmark icon) and "New" (with a green plus icon).

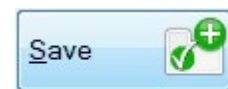
Edit / New

Make and changes to the selected Referee Record, or Fill in all details if you are creating a NEW Referee record.

You can delete an Referee record by pressing the Delete Button.



Press Save to save any changes made to this record



Incidents

Record an occurrence of an Incident. An Incident is something that has happened that potentially brings the reputation of your CarePlus volunteer into question, or an Incident where a child has been injured / abused in some manner. There are enough fields to fill in this area to allow you to completely document the Incident, including who has recorded the event, how is investigating etc.

(Note the other Tab Names have been hidden for clarity, they are normally all displayed)

Click on the [Edit](#) / [New](#) buttons to edit the selected record, or to create a new Incident Record.

Incidents

Incident Date	<input type="text" value="01/01/2008"/>		
Incident Time	<input type="text" value="10:00AM"/>	Incident Status	<input type="text" value="Under Investigation"/>
Recorded Date	<input type="text" value="02/01/2008"/>	Recorded Time	<input type="text" value="11:00AM"/>
Recorded By	<input type="text" value="Stephen"/>		
Investigated By	<input type="text" value="Cathy Hickingbotham"/>		
Incident Reported	<input style="height: 40px;" type="text" value="This is where the actual incident is recorded"/>		
People Involved	<input style="height: 40px;" type="text" value="This is where the people involved are recorded"/>		
Conclusion	<input style="height: 40px;" type="text" value="This is where the conclusion to the incident is recorded"/>		

Edit / New

Make and changes to the selected Incident Record, or Fill in all details if you are creating a NEW Incident record.

You can delete an Incident record by pressing the Delete Button.



Press Save to save any changes made to this Incident record



Audit

As information is added to CarePlus, or Edited, Pastoral Care saves and keeps an Audit Trail of these changes. If permission is given in the CarePlus Security area, you can delete an item by selecting it and pressing the Delete button.

To view audit information in the different areas, select the Audit Drop down box.

The screenshot shows a software interface for viewing audit information. At the top right, there is a yellow tab labeled "Audit". Below this, on the left, is a dropdown menu labeled "Audit" with "Risk Rating" selected. To the right of the dropdown is a "Delete" button with a red X icon. Below these elements is a table with three columns: "Date", "UserName", and "Changed To". The first row of the table is highlighted in blue and contains the values "16/03/2007", "Stephen", and "Medium".

Date	UserName	Changed To
16/03/2007	Stephen	Medium

CarePlus Reports

The CarePlus reporting area is a comprehensive report engine allowing you to design the content of your reports just for your needs. This approach allows each church to customise the reports to suit their specific compliance requirements. There are so many varied options in this area, it is not practical to show you every report combination, so we will talk in principle mostly on what the reporting engine can provide, and attempt to explain all options.

Accessing the Reports

There are two distinct areas in CarePlus. One is called [Add / Edit Records](#), and the other is called Reports. To select the reports area in CarePlus, simply select the reports option from the CarePlus [Menu List](#).

Pre-Flight Options

Most of the reports in CarePlus have a Pre-Flight option window (or several). A Pre-Flight option window allows you to select additional reporting options, filters and fields to include on the report. Make sure you look at the Pre-Flight options carefully, as these can greatly enhance the usability of the reports.

Selecting and Running Reports

To run a report, simply double click on the report style that interests you, and set any Pre-Flight options to see your report.

There are 5 different report styles in CarePlus, click on each report below for more information.



Build CarePlus Report

The Build CarePlus report allows you to select different CarePlus data areas to include on a report. Ticking all options will give you a really thorough "All Information" report on each person who has any CarePlus records.

Pre-Flight

The Pre-Flight options for the "Build CarePlus Reports" report is shown below.



Click on each option on the sample screen below to learn more about these options.

CarePlus Build Report Setup

Compliance Type <input type="text" value="Blue Card"/>	<input type="checkbox"/> Page Break between individuals <input type="checkbox"/> Allow page break in details
<input checked="" type="checkbox"/> Enable CarePlus Filters	
Risk Rating <input type="text" value="No Selection"/>	Procedure <input type="checkbox"/> Certificate Received <input type="checkbox"/> Interview Completed <input type="checkbox"/> Police Check Done
Current Status <input type="text" value="No Selection"/>	Date Filter 26
Review <input type="text" value="No Selection"/>	
Incident Status <input type="text" value="No Selection"/>	

Careplus components to include within report..

Personal Details <input type="checkbox"/> Address <input type="checkbox"/> Phone <input type="checkbox"/> Family Email <input type="checkbox"/> Family Mobile <input type="checkbox"/> Family Fax <input type="checkbox"/> Preferred Name	Conditional Flags <input type="checkbox"/> Risk <input type="checkbox"/> Status <input type="checkbox"/> Review	Procedure <input type="checkbox"/> Certificate Received <input type="checkbox"/> Interview Completed <input type="checkbox"/> Police Check Done
Events <input type="checkbox"/> Expiry Date of Compliance	Comments <input type="checkbox"/> Compliance Receipt Number	Include Details <input type="checkbox"/> Include Notes <input type="checkbox"/> Include Application details <input type="checkbox"/> Include Referee details <input type="checkbox"/> Include Incident details

Compliance Type

Select the Compliance Type you are wanting to report against.
Note, most churches will only have one compliance type to report against.

Compliance Type
Blue Card

Page Breaks

Choose Page Break options to enhance the report. For example, if you are printing out all information for each person in CarePlus, ticking the Page Break between individuals will produce reports that can be separated into a file for each person more easily.

Page Break between individuals
 Allow page break in details

Enable CarePlus Filters

Tick this option to enable all CarePlus filters for your report. Use Filters to narrow down the people displayed on the report to selected groups of people that meet your filter settings.

Enable CarePlus Filters

Select any of the status type of filters to find people by

Risk Rating
No Selection

Select a Risk Rating to find all people of a certain risk rating. For example, select Low to find all people with a CarePlus risk rating of Low

See [Risk Rating](#) for more information on Risk Rating Definition.

Current Status
No Selection

Select a Current Status to find all people who's Accreditation is of a selected Status. For example to find all people with a WWCC Card that has Expired, select a status of Expired.

See [Current Status](#) for information on the definition of Current Status

Review
No Selection

Select a Review option to find all people who's Review is up to certain stage. For example to find all people with a review of "Under Review" select that stage from this list.

See [Review](#) for information on the definition of Review

Incident Status
No Selection

Select a Incident Status option to find all people who's Incident Status matches your selection. For example to find all people with an Incident

See [Incidents](#) for more information on this area.

Status of "Under Investigation" select
that status from this list

Select any of the Procedure type of filters to find people by. Note, if you tick more than one option, then the report will only find people that have those 2 or more options ticked on their CarePlus record.

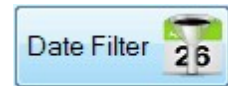
Procedure

Certificate Received

Interview Completed

Police Check Done

Press the Date Filter option to open the following screen.



Simply tick an area to activate that date filter, and set the From and To range for that selected date.

CarePlus Date Filters

<p><input checked="" type="checkbox"/> Activate Application Date Filtering</p> <p>Sunday .14 October 2012 </p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 </p>	<p><input checked="" type="checkbox"/> Activate Referee Date Filtering</p> <p>Sunday .14 October 2012 </p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 </p>
<p><input checked="" type="checkbox"/> Activate Incident Date Filtering</p> <p>Sunday .14 October 2012 </p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 </p>	<p><input checked="" type="checkbox"/> Activate Event Date Filtering</p> <p>Sunday .14 October 2012 </p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 </p>

Close

+Select the CarePlus components (fields / information) that you want to include on your report.



Click below for more information

Personal Details <input type="checkbox"/> Address <input type="checkbox"/> Phone <input type="checkbox"/> Family Email <input type="checkbox"/> Family Mobile <input type="checkbox"/> Family Fax <input type="checkbox"/> Preferred Name	Conditional Flags <input type="checkbox"/> Risk <input type="checkbox"/> Status <input type="checkbox"/> Review	Procedure <input type="checkbox"/> Certificate Received <input type="checkbox"/> Interview Completed <input type="checkbox"/> Police Check Done
Events <input type="checkbox"/> Expiry Date of Compliance	Comments <input type="checkbox"/> Compliance Receipt Number	Include Details <input type="checkbox"/> Include Notes <input type="checkbox"/> Include Application details <input type="checkbox"/> Include Referee details <input type="checkbox"/> Include Incident details

Tick any of the personal details available to include on your report.

(Note, this list is shown expanded to include all options without scrolling)

Personal Details

- Street
- Suburb
- Postcode
- Phone
- Family Email
- Family Mobile
- Family Fax
- Birth Date
- Other Surname
- Middle Name
- Personal Email
- Mobile Phone
- Business Phone
- Business Email
- Business Fax
- School Year

Choose to display any of the following condition flags on the report.

Conditional Flags

- Risk
- Status
- Review

Tick any of the Procedure options that you want to output to the report.

Procedure

- Certificate Received
- Interview Completed
- Police Check Done

Tick any of the Events that you want to include on the report.

Events

Expiry Date of Compliance

Tick any of the Comments that you want to include on the report.

Comments

Compliance Receipt Number

Tick any of the Detail areas that you want to include on the report.

Include Notes

Include Application details

Include Referee details

Include Incident details

Sample Report

Shown below is a sample CarePlus Report with many of the CarePlus fields ticked for inclusion on this report.

CarePlus Report

Allwright 054-33-5478
 Stephen
 11 Blackdog Road
 Riddels Creek 3412 VIC

Risk Rating : Medium
Current Status : Current
 Certificate Received

Notes: This is where notes about an individuals compliance can be stored

Application #1 **Recieved:** 28/09/2012 **Approval:** Yes
Approved By: Stephen

Referee #1 **Notes:** This is where notes about an application can be stored
Recieved: 01/01/2013
Given Name: Stephen
Surname: Hickingbotham
Phone: 0358111111
Address: 5 Spirit Drive
 Mansfield 3377

Notes: This is where notes about a Referee can be stored

Incident #1 **Incident Date:** 01/01/2008 **Incident Time:** 10:00AM
Recorded Date: 02/01/2008 **Recorded Time:** 11:00AM
Incident Status: Under Investigation
Recorded By: Stephen
Investigated By: Cathy Hickingbotham
Incident Reported: This is where the actual incident is recorded
People Involved: This is where the people involved are recorded
Conclusion: This is where the conclusion to the incident is recorded

Application #1 **Recieved:** 28/09/2012 **Approval:** Yes
Approved By: Stephen

Referee #1 **Notes:** This is where notes about an application can be stored
Recieved: 01/01/2013
Given Name: Stephen
Surname: Hickingbotham
Phone: 0358111111
Address: 5 Spirit Drive
 Mansfield 3377

Notes: This is where notes about a Referee can be stored

Incident #1 **Incident Date:** 01/01/2008 **Incident Time:** 10:00AM
Recorded Date: 02/01/2008 **Recorded Time:** 11:00AM
Incident Status: Under Investigation
Recorded By: Stephen
Investigated By: Cathy Hickingbotham
Incident Reported: This is where the actual incident is recorded
People Involved: This is where the people involved are recorded
Conclusion: This is where the conclusion to the incident is recorded

Build CarePlus Column Report

The CarePlus Column Report allows you to create a simple grid like report that simulates the look of a spreadsheet. These reports allow you to simply select a few CarePlus Filters, the fields you want to display and some page formatting options to design the report.

Pre-Flight

The Pre-Flight options for the "Build CarePlus Column Report" is shown below.



Click on each option on the sample screen below to learn more about these options.

CarePlus Column Report Setup

Compliance Type

Enable CarePlus Filters

Risk Rating

Current Status

Review

Incident Status

Procedure
 Certificate Received
 Interview Completed
 Police Check Done

Date Filter 26

Careplus components to include within report..

Personal Details
 Street
 Suburb
 Postcode
 Phone
 Family Email
 Family Mobile

Conditional Flags
 Risk
 Status
 Review

Procedure
 Certificate Received
 Interview Completed
 Police Check Done

Events
 Expiry Date of Compliance

Comments
 Compliance Receipt Number

Columns to Display

Use Small Font Size
 Use Arial Narrow Font

Compliance Type

Select the Compliance Type you are wanting to report against.
Note, most churches will only have one compliance type to report against.

Compliance Type
Blue Card

Enable CarePlus Filters

Tick this option to enable all CarePlus filters for your report. Use Filters to narrow down the people displayed on the report to selected groups of people that meet your filter settings.

Enable CarePlus Filters

Select any of the status type of filters to find people by

Risk Rating
No Selection

Select a Risk Rating to find all people of a certain risk rating. For example, select Low to find all people with a CarePlus risk rating of Low

See [Risk Rating](#) for more information on Risk Rating Definition.

Current Status
No Selection

Select a Current Status to find all people who's Accreditation is of a selected Status. For example to find all people with a WWCC Card that has Expired, select a status of Expired.

See [Current Status](#) for information on the definition of Current Status

Review
No Selection

Select a Review option to find all people who's Review is up to certain stage. For example to find all people with a review of "Under Review" select that stage from this list.

See [Review](#) for information on the definition of Review

Incident Status
No Selection

Select a Incident Status option to find all people who's Incident Status matches your selection. For example to find all people with an Incident Status of "Under Investigation" select that status from this list

See [Incidents](#) for more information on this area.

Select any of the Procedure type of filters to find people by. Note, if you tick more than one option, then the report will only find people that have those 2 or more options ticked on their CarePlus record.

Procedure

Certificate Received

Interview Completed

Police Check Done



Press the Date Filter option to open the following screen.

Simply tick an area to activate that date filter, and set the From and To range for that selected date.

CarePlus Date Filters

<p><input checked="" type="checkbox"/> Activate Application Date Filtering</p> <p>Sunday .14 October 2012 </p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 </p>	<p><input checked="" type="checkbox"/> Activate Referee Date Filtering</p> <p>Sunday .14 October 2012 </p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 </p>
<p><input checked="" type="checkbox"/> Activate Incident Date Filtering</p> <p>Sunday .14 October 2012 </p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 </p>	<p><input checked="" type="checkbox"/> Activate Event Date Filtering</p> <p>Sunday .14 October 2012 </p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 </p>

Close

CarePlus Components to include...

Select the CarePlus components (fields / information) that you want to include on your report.



Click below for more information

Personal Details <input type="checkbox"/> Street <input type="checkbox"/> Suburb <input type="checkbox"/> Postcode <input type="checkbox"/> Phone <input type="checkbox"/> Family Email <input type="checkbox"/> Family Mobile	Conditional Flags <input type="checkbox"/> Risk <input type="checkbox"/> Status <input type="checkbox"/> Review	Procedure <input type="checkbox"/> Certificate Received <input type="checkbox"/> Interview Completed <input type="checkbox"/> Police Check Done
Events <input type="checkbox"/> Expiry Date of Compliance	Comments <input type="checkbox"/> Compliance Receipt Number	Columns to Display Portrait Five Column <input checked="" type="checkbox"/> Use Small Font Size <input checked="" type="checkbox"/> Use Arial Narrow Font

Tick any of the personal details available to include on your report.

(Note, this list is shown expanded to include all options without scrolling)

Personal Details

- Street
- Suburb
- Postcode
- Phone
- Family Email
- Family Mobile
- Family Fax
- Birth Date
- Other Surname
- Middle Name
- Personal Email
- Mobile Phone
- Business Phone
- Business Email
- Business Fax
- School Year

Choose to display any of the following condition flags on the report.

Conditional Flags

- Risk
- Status
- Review

Tick any of the Procedure options that you want to output to the report.

Procedure

- Certificate Received
- Interview Completed
- Police Check Done

Tick any of the Events that you want to include on the report.

Events

Expiry Date of Compliance

Tick any of the Comments that you want to include on the report.

Comments

Compliance Receipt Number

Page Options

The following page options are available for the Column Report.

[Columns to display](#) and [Font Options](#)

Choose Portrait or Landscape orientation, and the number of columns needed to display the number of [CarePlus Components to include...](#)

Columns to Display

Portrait Two Column ▾

To assist in fitting information on the page, the following options are available for the Column Report.

Use Small Font Size

Use Arial Narrow Font

Sample Report

Shown below is a Portrait 5 column report. Note, the number of columns does not include the Name Column. By Default, the Name column is included and cannot be turned off or modified.

CarePlus Column Report						
		Personal Email	Mobile Phone	Status	Expiry Date of	Compliance
Allwright	Stephen	stephen@spirit.com.au	041234567890	Current	01/01/2009	SHE003456
Angel	Peter		041234567890			

Run Standard Pastoral Care Report

As well as being able to run specialised reports for CarePlus, the CarePlus area allows you to also combine filters for CarePlus criteria with Standard Pastoral Care reports.

For example, you could run a report for all people who's date of compliance expiry was coming up and print out a custom letter letting each of them know that they need to apply for their renewal for Working With Children card, or their Police Check etc.

Pre-Flight

The Pre-Flight options for Pastoral Care Standard Reports in CarePlus are shown below. Click on each area for more information.

The screenshot shows the 'CarePlus Standard Report Setup' dialog box. It features several configuration options:

- Compliance Type:** A dropdown menu set to 'Blue Card'.
- Report Mode:** Radio buttons for 'Family' and 'Individual', with 'Individual' selected.
- Filters:** A checked box for 'Enable CarePlus Filters'.
- Risk Rating:** A dropdown menu set to 'No Selection'.
- Current Status:** A dropdown menu set to 'No Selection'.
- Review:** A dropdown menu set to 'No Selection'.
- Incident Status:** A dropdown menu set to 'No Selection'.
- Procedure:** A list of checkboxes for 'Certificate Received', 'Interview Completed', and 'Police Check Done', all of which are currently unchecked.
- Date Filter:** A button with a calendar icon and the number '26'.
- Report Selection:** A tree view on the right containing 'Names Report', 'Manual Report', 'All Family Information', 'Standard Reports', 'Custom', and 'Analysis'. 'Names Report' is highlighted.
- Buttons:** 'Help' (with a question mark icon), 'Close' (with a circular arrow icon), and 'Continue' (with a right-pointing arrow icon).

Compliance Type

Before entering any information in this area, be certain that you select the correct Compliance Type to work with. Most churches will have only one compliance type, and that should match your state / government legislative title for the State / Territory your church resides in.

Compliance Type

Status Filters

Select any of the status type of filters to find people by

Risk Rating

Select a Risk Rating to find all people of a certain risk rating. For example, select Low to find all people with a CarePlus risk rating of Low

See [Risk Rating](#) for more information on [Risk Rating Definition](#).

Current Status

Select a Current Status to find all people who's Accreditation is of a selected Status. For example to find all people with a WWCC Card that has Expired, select a status of Expired.

See [Current Status](#) for information on the [definition of Current Status](#)

Review

Select a Review option to find all people who's Review is up to certain stage. For example to find all people with a review of "Under Review" select that stage from this list.

See [Review](#) for information on the [definition of Review](#)

Incident Status

Select a Incident Status option to find all people who's Incident Status matches your selection. For example to find all people with an Incident Status of "Under Investigation" select that status from this list

See [Incidents](#) for more information on this [area](#).

Procedure Filters

Select any of the Procedure type of filters to find people by. Note, if you tick more than one option, then the report will only find people that have those 2 or more options ticked on their CarePlus record.

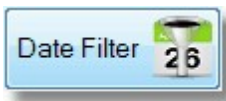
Procedure

Certificate Received

Interview Completed

Police Check Done

Date Filters



Press the Date Filter option to open the following screen.

Simply tick an area to activate that date filter, and set the From and To range for that selected date.

CarePlus Date Filters

<p><input checked="" type="checkbox"/> Activate Application Date Filtering</p> <p>Sunday .14 October 2012 <input type="text"/></p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 <input type="text"/></p>	<p><input checked="" type="checkbox"/> Activate Referee Date Filtering</p> <p>Sunday .14 October 2012 <input type="text"/></p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 <input type="text"/></p>
<p><input checked="" type="checkbox"/> Activate Incident Date Filtering</p> <p>Sunday .14 October 2012 <input type="text"/></p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 <input type="text"/></p>	<p><input checked="" type="checkbox"/> Activate Event Date Filtering</p> <p>Sunday .14 October 2012 <input type="text"/></p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 <input type="text"/></p>

Close

Report Mode

Choose Family or Individual Mode for any selected report.
Note, for CarePlus, the most sensible options are Individual mode options, as CarePlus deals with people as individuals, not as a family.



Reports List

Select any standard Pastoral Care report from the list of available reports. This includes Custom Reports, Directories, Letters, Templates etc.

Export Care Plus Data

The Export CarePlus Data option lets you to select different CarePlus data areas to include in an export file. Ticking all options will give you are really thorough "All Information" output on each person who has any CarePlus records.

Pre-Flight



The Pre-Flight options for the "Build CarePlus Reports" report is shown below. Click on each option on the sample screen below to learn more about these options.

CarePlus Column Report Setup

Compliance Type

Enable CarePlus Filters

Risk Rating

Current Status

Review

Incident Status

Procedure
 Certificate Received
 Interview Completed
 Police Check Done

Date Filter 26

Careplus components to include within report..

Personal Details
 Street
 Suburb
 Postcode
 Phone
 Family Email
 Family Mobile

Conditional Flags
 Risk
 Status
 Review

Procedure
 Certificate Received
 Interview Completed
 Police Check Done

Events
 Expiry Date of Compliance

Comments
 Compliance Receipt Number

Format
 Comma separator
 Comma & quote separator
 Export dates as actual date
 Export dates as a serial number

Include Incident Date & Status at end of export file

Compliance Type

Select the Compliance Type you are wanting to export from. Note, most churches will only have one compliance type to report against.

Compliance Type
Blue Card

Enable CarePlus Filters

Tick this option to enable all CarePlus filters to control the Export File with. Use Filters to narrow down the people exported to selected groups of people that meet your filter settings.

Enable CarePlus Filters

Select any of the status type of filters to find people by

Risk Rating
No Selection

Select a Risk Rating to find all people of a certain risk rating. For example, select Low to find all people with a CarePlus risk rating of Low

See [Risk Rating](#) for more information on Risk Rating Definition.

Current Status
No Selection

Select a Current Status to find all people who's Accreditation is of a selected Status. For example to find all people with a WWCC Card that has Expired, select a status of Expired.

See [Current Status](#) for information on the definition of Current Status

Review
No Selection

Select a Review option to find all people who's Review is up to certain stage. For example to find all people with a review of "Under Review" select that stage from this list.

See [Review](#) for information on the definition of Review

Incident Status
No Selection

Select a Incident Status option to find all people who's Incident Status matches your selection. For example to find all people with an Incident Status of "Under Investigation" select that status from this list

See [Incidents](#) for more information on this area.

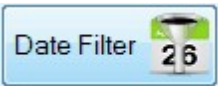
Select any of the Procedure type of filters to find people by. Note, if you tick more than one option, then the output file will only include people that have those 2 or more options ticked on their CarePlus record.

Procedure

Certificate Received

Interview Completed

Police Check Done



Press the Date Filter option to open the following screen.

Simply tick an area to activate that date filter, and set the From and To range for that selected date.

CarePlus Date Filters

<p><input checked="" type="checkbox"/> Activate Application Date Filtering</p> <p>Sunday .14 October 2012 </p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 </p>	<p><input checked="" type="checkbox"/> Activate Referee Date Filtering</p> <p>Sunday .14 October 2012 </p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 </p>
<p><input checked="" type="checkbox"/> Activate Incident Date Filtering</p> <p>Sunday .14 October 2012 </p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 </p>	<p><input checked="" type="checkbox"/> Activate Event Date Filtering</p> <p>Sunday .14 October 2012 </p> <p style="text-align: center;">To</p> <p>Sunday .14 October 2012 </p>

Close

+Select the CarePlus components (fields / information) that you want to include on your report.



Click below for more information

Personal Details <input type="checkbox"/> Street <input type="checkbox"/> Suburb <input type="checkbox"/> Postcode <input type="checkbox"/> Phone <input type="checkbox"/> Family Email <input type="checkbox"/> Family Mobile	Conditional Flags <input type="checkbox"/> Risk <input type="checkbox"/> Status <input type="checkbox"/> Review	Procedure <input type="checkbox"/> Certificate Received <input type="checkbox"/> Interview Completed <input type="checkbox"/> Police Check Done
Events <input type="checkbox"/> Expiry Date of Compliance	Comments <input type="checkbox"/> Compliance Receipt Number	Format <input checked="" type="radio"/> Comma separator <input type="radio"/> Comma & quote separator <input checked="" type="radio"/> Export dates as actual date <input type="radio"/> Export dates as a serial number

Tick any of the personal details available to include on your Export.

(Note, this list is shown expanded to include all options without scrolling)

Personal Details

- Street
- Suburb
- Postcode
- Phone
- Family Email
- Family Mobile
- Family Fax
- Birth Date
- Other Surname
- Middle Name
- Personal Email
- Mobile Phone
- Business Phone
- Business Email
- Business Fax
- School Year

Choose to display any of the following condition flags in the export file.

Conditional Flags

- Risk
- Status
- Review

Tick any of the Procedure options that you want to include in the export file.

Procedure

- Certificate Received
- Interview Completed
- Police Check Done

Tick any of the Events that you want to include in the export file.

Events

- Expiry Date of Compliance

Tick any of the Comments that you want to include in the export file.

Comments

Compliance Receipt Number

Select the format option for the text file output that you want to use. For best reliability in excel, select Comma and Quote Separator, and Export Dates as a serial number.

Format

Comma separator

Comma & quote separator

Export dates as actual date

Export dates as a serial number

Note the Date column in Excel will need to be formatted as a date when using serial number export format.

Tick this option to include Any Incident Status data and Incident Date information in the export file.

Include Incident Date & Status at end of export file

Library Manager

Use the Library Manager to look after the process of loaning out and tracking the return of assets to the church.

For full information on this area see :

[Introduction](#)

[The Main Window](#)

Introduction

The Library Manager allows you to completely manage a library of assets, such as Books, Tapes, CD's, DVD's, Magazines etc. There is no limit the different types of assets you can keep a track of. This feature is designed around an actual Library, with features like tracking of outstanding loans, alerting people via SMS / Email when a reserved asset becomes Available, or Overdue etc.

For information on how to setup the various libraries you may want to manage, see [Setup Library Manager](#).

There are 3 main area to managing a Library. The Management of Loaning items to an individual, the Management of your assets, and running reports on the condition of your library.

Documentation Scope

We will be talking in this documentation on the functions of a single library. Pastoral Care can run multiple libraries for diversely different asset types, however this documentation will use a sample Resource Library with Books, DVD, CD etc in it.

Uses for the Library Manager

Some things the Library Manager can be used for:

- Library of Books, CD's DVD's etc
- Loaning of PA and Tech Equipment
- Loaning of Catering Equipment etc

How to Loan Out an Asset

The following steps can be used to loan out an asset. For a more automated method of recording an asset loan, see [Bar Code Loans](#)

Step 1 Press [Load](#) on the Library Toolbar to load in all people, alternatively use [Filters](#) to load in selected people if you are using a status of say Library for all people with permission to use the Library



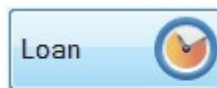
Step 2 Select a person from the loaded list who wants to borrow an asset.



Step 3 Select an Asset from the list of assets that has been loaded into the Library.

Status	Title
On Loan	The Jesus you Cant Ignore
On Shelf	The Truth War
On Shelf	Twelve Ordinary Men
On Shelf	Twelve Extraordinary Women
On Shelf	The Tale of two Sons

Step 4 Press the Loan button to add the selected asset to the selected individual



How to Accept a Returned Asset

The following steps can be used to receive a returned asset. For a more automated method of recording an asset loan, see [Bar Code Loans](#)

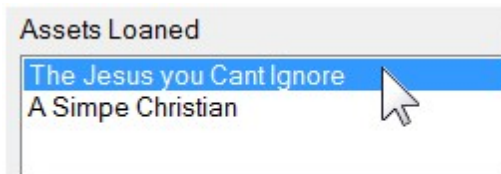
- Step 1** Press [Load](#) on the Library Toolbar to load in all people *with assets on loan*.



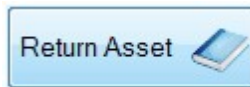
- Step 2** Select a person from the loaded list who wants to return an asset.



- Step 3** Select an Asset from the list of assets that have been loaned to the selected person.



- Step 4** Press the Return button to add the selected asset to the selected individual



How to add Assets to your Library

Use the [Add / Edit / View Assets](#) area to add an asset to your library. Simply select Add / Edit / View Assets from the main Library Window, press the Add Asset button, and fill in the following form.

Full Information on this feature can be found in [Add / Edit / View Assets](#).

Add Asset

Added Date

Copy

ISBN

Title

Author

Comment

Asset Type

Status

Loan Period (days)

Category

- Family Life
- Commentary
- Counselling
- Bible
- Fiction
- Theology
- Children

Add Asset to Bar Code Print Report

Help Mask Save

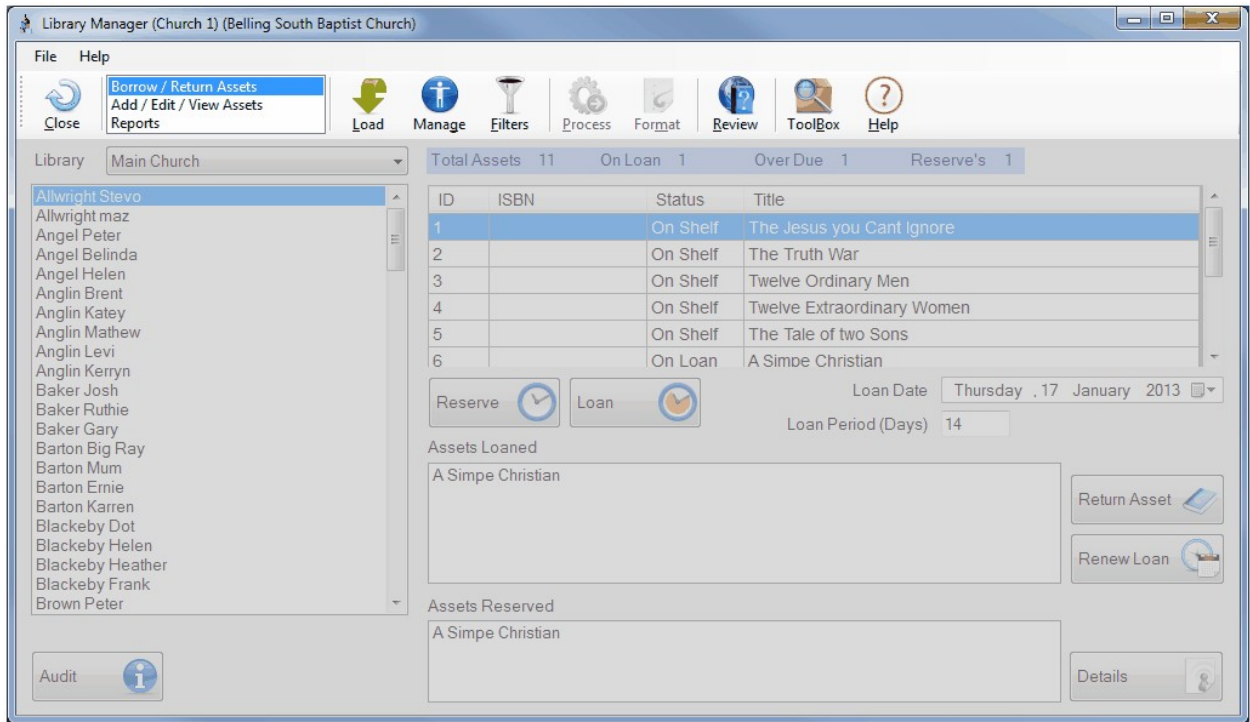
The Main Window

The Main Library Window is shown below. For more general information on the Library Manager see:

[Introduction](#), [How to Loan Out an Asset](#), [How to Accept a Returned Asset](#), [How to add Assets to your Library](#)



Click on each part of this window to learn more. Note, this is shown with the Borrow Return Assets option selected.



Toolbar

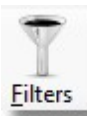
The following buttons are on the Library Toolbar.



The [Load](#) button works for both the [Borrow / Return Assets](#) and the [Add / Edit / View Assets](#) area of Library. Use Load to load into the Library Manager, people and assets for use.



Manage the Library with more advanced options including the use of Bar Code scanners. See [Manage](#) for full details



Use standard Pastoral Care [Filters](#) for effecting who you load into the Library Program.



Process and display a selected report from the Library Manger [Reports](#) area.



Use standard Pastoral Care Report [Format](#) options for controlling various options for the display of reports



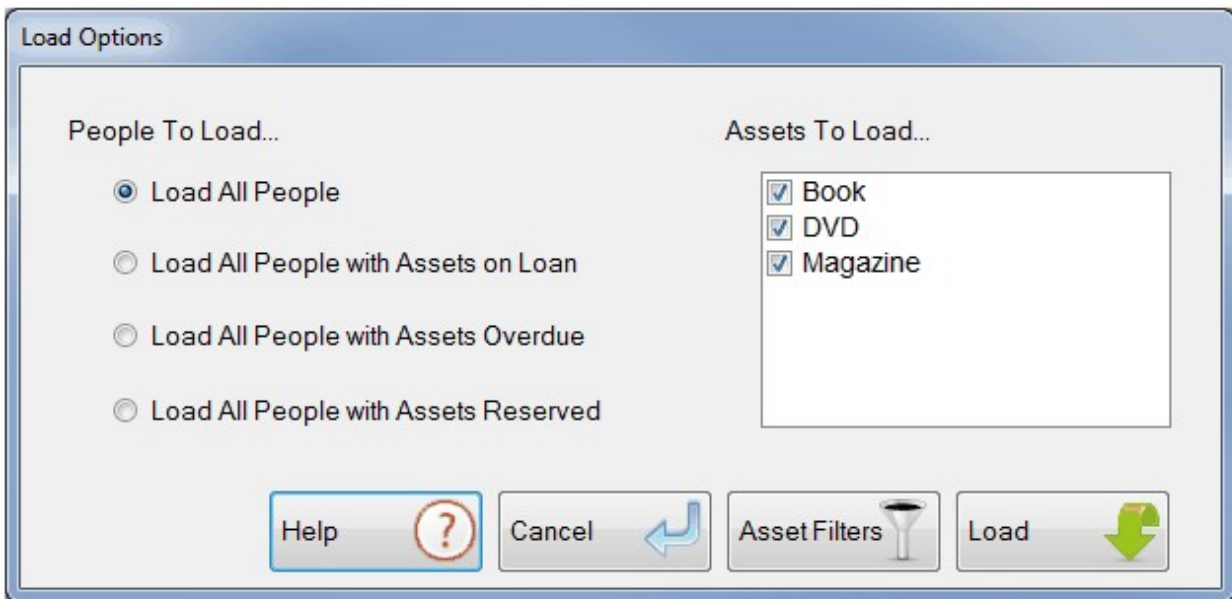
When available, press this button to load up a Web Page with a Book Review on the currently selected Asset. This is an ISBN look up, so only assets with an ISBN number saved in them will work with this feature..

Load

The Load button works for both the [Borrow / Return Assets](#) and the [Add / Edit / View Assets](#) area of Library. Use Load to load into the Library Manager, people and assets for use.



Click on each part of the Load Window to learn more.



People To Load

Load All People

Select this option to load in all people into the Library Program. This can also be affected by using Pastoral Care [Filters](#) to restrict this load to All people matching a filter.

Load All People with Assets on Loan

Select this option if you are accepting Assets back into the Library, as this will just load everyone who has an asset out on loan. This can also be affected by using Pastoral Care [Filters](#) to restrict this load to All people matching a filter who also have Assets on Loan.

Load All People with Assets Overdue

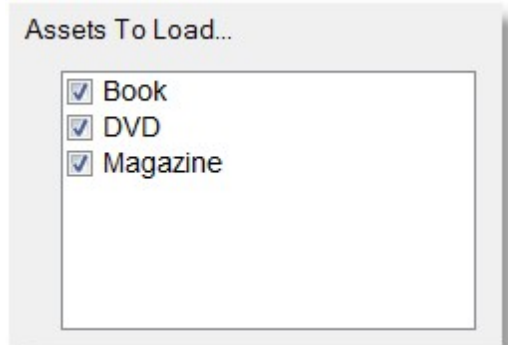
Select this option if you want to review people who have overdue Assets out on loan. This can also be affected by using Pastoral Care [Filters](#) to restrict this load to All people matching a filter who also have Assets overdue.

Load All People with Assets Reserved

Select this option if you want to review people who have Assets on reserve. This can also be affected by using Pastoral Care [Filters](#) to restrict this load to All people matching a filter who also have Assets on reserve.

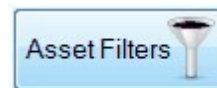
Assets To Load

By default, all Assets are loaded for the selected Library. If you cannot see an Asset Type in this list that you are expecting to see, you might have the wrong library selected from the main Library Screen.



Asset Filters

Press the Asset Filters button to load the comprehensive filter window for selection of Assets. Asset Filters are useful in allowing you to locate assets quickly and easily.



Note, this window is controlled also by the Selected Library that is chosen from the Library Main Window.



Click on all areas of the Asset Filters window below to learn more. Note, Category options are setup in the [Setup Library Manager](#) area for each Library you use. These are shown here only as examples.

Library Asset Filters X

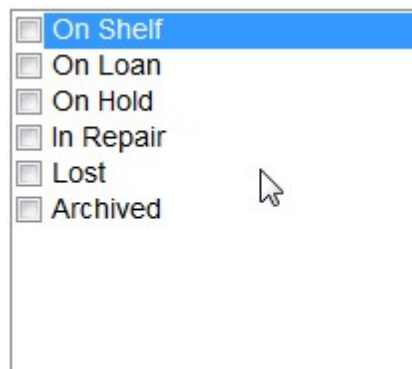
<p>Status</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> On Shelf <input type="checkbox"/> On Loan <input type="checkbox"/> On Hold <input type="checkbox"/> In Repair <input type="checkbox"/> Lost <input type="checkbox"/> Archived 	<p>Category</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching 	<p>Filter on Asset Details</p> <p>Title <input type="text"/></p> <p>Author <input type="text"/></p> <p>Comment <input type="text"/></p> <p>ISBN <input type="text"/></p> <p>Asset Type <input checked="" type="radio"/> Primary & Copy <input type="radio"/> Primary <input type="radio"/> Copy</p>
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<p><input checked="" type="checkbox"/> Filter on Added Date</p> <p>19/01/2013 <input type="text"/> To 19/01/2013 <input type="text"/></p> <p><input checked="" type="checkbox"/> Filter on Assets Due Date</p> <p>19/01/2013 <input type="text"/> To 19/01/2013 <input type="text"/></p>	<p><input checked="" type="checkbox"/> Filter on Assets Loaned Date</p> <p>19/01/2013 <input type="text"/> To 19/01/2013 <input type="text"/></p> <p>Filter on part of a Surname Asset Loaned to</p> <p><input type="text"/></p>
--	--

Status

These are the available status filters for any Library Item. These are system assigned Status's, and cannot be added to or modified.

To filter for any combination of Status's, simply tick those that you want. If you don't tick any, all will be included in the load.

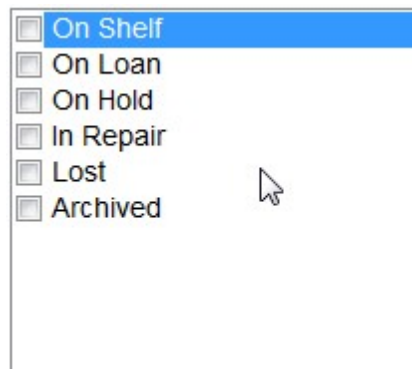


A screenshot of a status filter menu. It features a list of six status options, each with an unchecked checkbox to its left. The options are: On Shelf, On Loan, On Hold, In Repair, Lost, and Archived. The 'On Shelf' option is highlighted with a blue background. A mouse cursor is positioned over the 'Lost' option.

Category

These are the available Categories to filter on for any Library Item. These are user defined in that you can setup your own Categories in the [Setup Library Manager](#) area of Pastoral Care.

To filter for any combination of Categories, simply tick those that you want. If you don't tick any, all will be included in the load.



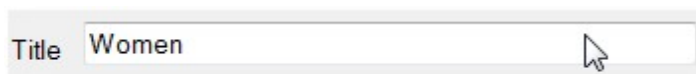
A screenshot of a category filter menu, identical in layout to the status filter menu. It features a list of six category options, each with an unchecked checkbox to its left. The options are: On Shelf, On Loan, On Hold, In Repair, Lost, and Archived. The 'On Shelf' option is highlighted with a blue background. A mouse cursor is positioned over the 'Lost' option.

Asset Details

Filter on any of the Asset Details available. See [Title](#), [Author](#), [Comment](#), and [ISBN](#)

Title

Filter for part of or all of a title. The more you type in this area, the more accurate and definitive the filter will become.



A screenshot of a search input field. The field is labeled 'Title' on the left. Inside the input box, the word 'Women' is typed. A mouse cursor is positioned at the end of the text.

The example above will find all assets with the word Women or women in the title. If you typed Women Of Faith, then the search would find any assets with part or all of the title containing the entire phrase "Women Of Faith".

The filters do not automatically ignore your spelling mistakes, for example Women of Fith will probably not find any assets!

Author

Filter for part of or all of an Author's Name. The more you type in this area, the more accurate and definitive the filter will become.

Author Charles Pickering

The example above will find all assets with a name of Charles Pickering. The filters do not automatically ignore your spelling mistakes, if you mis-type a search item, Pastoral Care will look for it!

Comment

Filter for part of or all of a comment. The more you type in this area, the more accurate and definitive the filter will become.

Comment easy

The example above will find all assets with the word Easy or easy in the comment. This might help you find a book that had a comment of Easy Read in the comments.

The filters do not automatically ignore your spelling mistakes, if you mis-type a search item, Pastoral Care will look for it!

ISBN

Filter for part of or all of an ISBN Number.

ISBN 123456789000012345

Asset Type

Choose to look for a Primary Asset, a Copy, or both

Asset Type Primary & Copy Primary Copy

Added Date



Use the Added Date filter to locate assets added to your Library within a selected date range.

Filter on Added Date
19/01/2013 To 19/01/2013

Due Date

Use the Due Date filter to locate assets that are due for return within a selected date range.



Filter on Assets Due Date

19/01/2013  To 19/01/2013 

Loaned Date

Use the Assets Loaned Date filter to locate assets that were loaned out within a selected date range.

Filter on Assets Loaned Date

19/01/2013  To 19/01/2013 


Surname

Enter a Surname or part of a Surname to find assets loaned out to a person / person's.

Filter on part of a Surname Asset Loaned to


Continue

Complete the filter form and do the Load based on your selected filters.

Continue 


Reset

Reset all filters on this window, letting you load in all assets.

Reset 

Load

Press this button to load the Assets / People selected into the Library Manager.

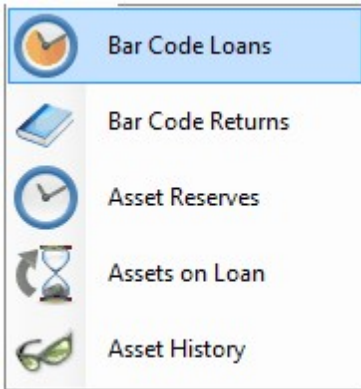
Load 

Manage

The Manage Button on the toolbar has the following additional selections to choose from...

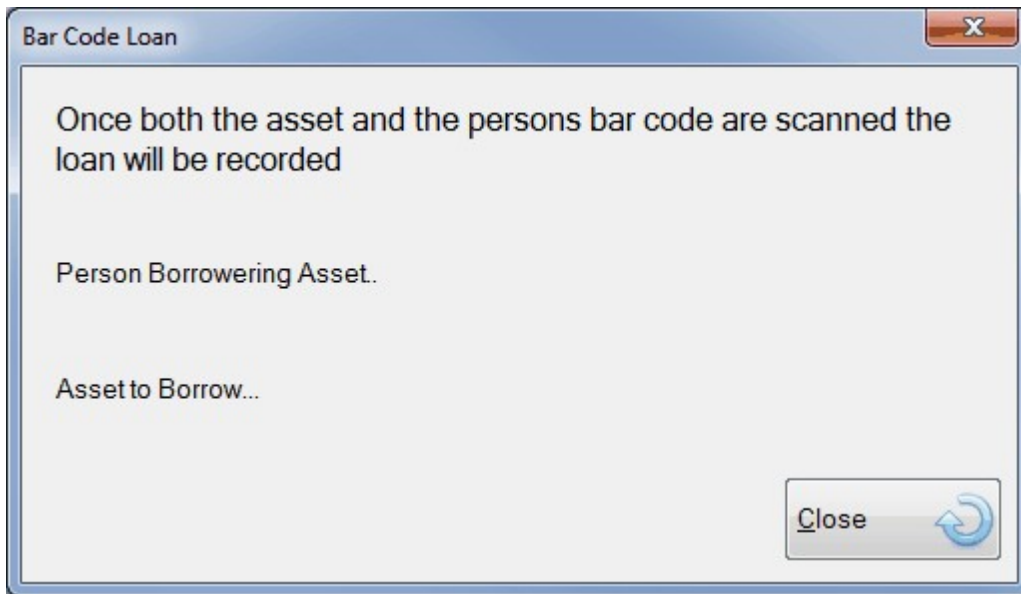


Click on each option for more details on each.



Bar Code Loans

This is a simple method to use for recording a loan. You will need a Library Members Card with a bar code for identifying the person borrowing an asset, and you will need an Asset Bar Code on the Asset.

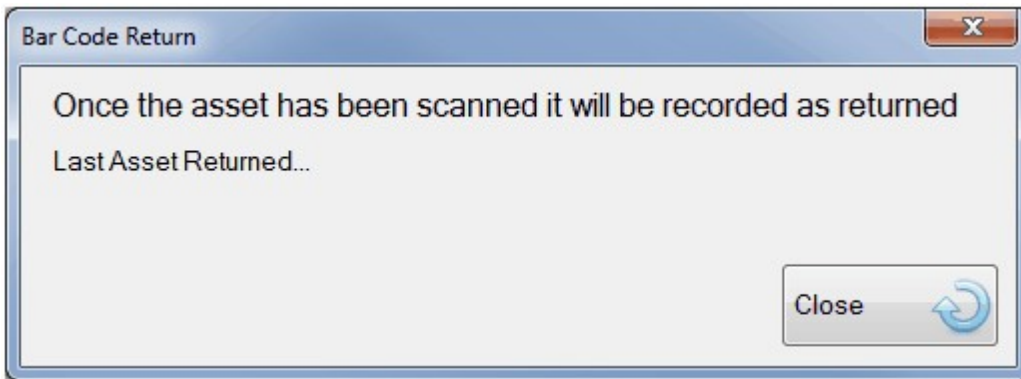


Simply Scan the members Bar Code, and the Asset Bar code to complete the loan record.

See [Library Card](#) for information on creating a Library Card, and see [Assets Barcode](#) for information on generating Bar Codes for Assets.

Bar Code Returns

This is a simple method to use for recording a loan. You will need a an Asset Bar Code on the Asset to complete a return.



Simply Scan the Asset Bar code to complete the asset return procedure.

See [Assets Barcode](#) for information on generating Bar Codes for Assets.

Asset Reserves

The Manage - Asset Reserves window lets you view all Assets that have been reserved by Library members. This window is handy for reviewing reserved items and contacting people when a reserved item has come in. Note: Pastoral Care will prompt you when an item has been returned that is also on reserve, so you can notify people immediately.



Click on each part of this window to learn more.

The screenshot shows a window titled "Manage Reserves" with a table of reserved items and a contact panel at the bottom.

Remove	ID	Status	Title	Reserved Date	Email	SMS	Phone	Reserved For...
	9	On Shelf	Right thinking in a World Gone Wrong	19/01/2013 08:40 PM	No	No	No	Stevo Allwright

Below the table is a "Make Contact.." section with buttons for SMS, Email, and Phone. To the right are buttons for Help, Remove Tag, and Close.

Reserve List

Remove	ID	Status	Title	Reserved Date	Email	SMS	Phone	Reserved For...
<input type="checkbox"/>	9	On Shelf	Right thinking in a World Gone Wrong	19/01/2013 08:40 PM	No	Yes	No	Stevo Allwright

This list shows all the people and items that they have on reserve. If someone has already been notified, then the Email, SMS or Phone column will show a Yes.

SMS

Pressing the SMS button will start a process to send a reminder text message to the selected person in the [Reserve List](#). You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose SMS Message. See [SMS](#) for more information on this area.

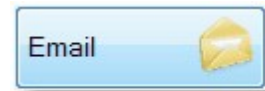


To send the message, simply tick the Send option on the line that contains the phone number to send to, and press the Send button on the toolbar. You can edit the message first by selecting Compose SMS Message if you wish

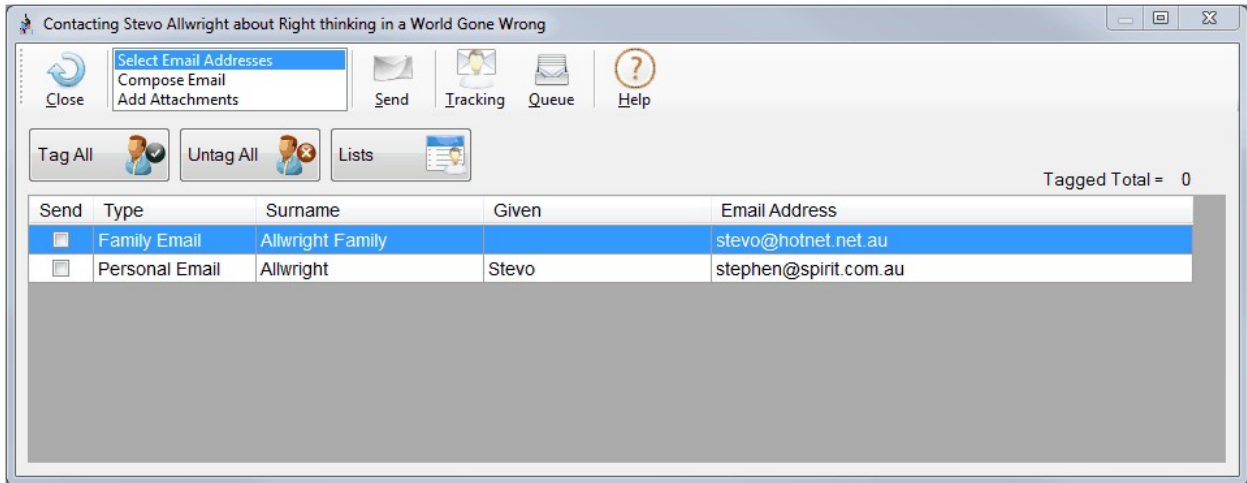
Send	Type	Surname	Given	Phone Number
<input checked="" type="checkbox"/>	Family Mobile	Allwright Family		0444-555-555
<input type="checkbox"/>	Family Phone	Allwright Family		054-33-5478
<input type="checkbox"/>	Family Fax	Allwright Family		NA
<input type="checkbox"/>	Personal Mobile	Allwright	Stevo	0400297025
<input type="checkbox"/>	Business Phone	Allwright	Stevo	018-998725

Email

Pressing the Email button will start a process to send a reminder Email message to the selected person in the [Reserve List](#). You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose Email Message. See [Email](#) for more information on this area.

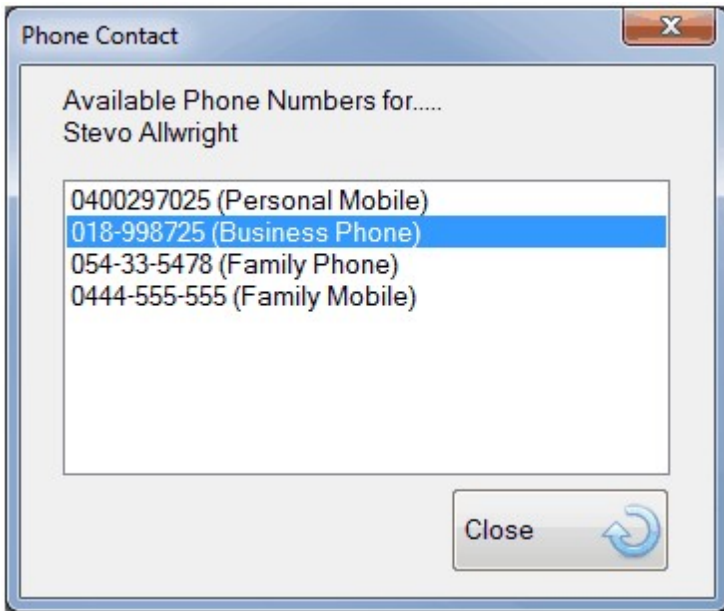
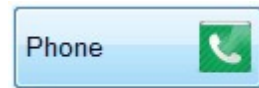


To send the message, simply tick the email address to send to, and press the Send button on the toolbar. You can edit the message first by selecting Compose Email if you wish



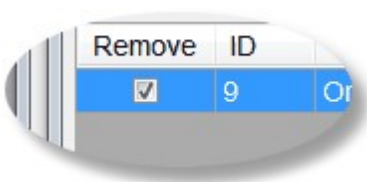
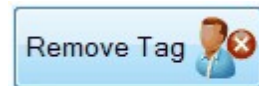
Phone

Press the Phone button to show the following window. This displays all available phone numbers for the selected person in the reserve list.



Remove Tag

Press the Remove Tag button to delete tagged items from the reserve list.



Assets On Loan

The Manage - Assets On Loan window allows you to see all Assets on loan, and all Overdue Assets at a glance.



Click on each part of this window to learn more.

Manage Assets on Loan X

Over Due Loaned Assets... To sort by column click on the appropriate header title

ID	ISBN	Title	Borrowed	Due Back	Borrowed By
6		A Simpe Christian	14/11/2009	28/11/2009	Stevo Allwright

On Loan...

ID	ISBN	Title	Borrowed	Due Back	Borrowed By
1		The Jesus you Cant Ignore	18/01/2013	01/02/2013	Stevo Allwright

Make Contact..

SMS

Email

Phone

Help

Renew Loan

Return Asset

Close

Overdue Assets

This is a list of all assets that are Overdue.

Over Due Loaned Assets...					To sort by column click on the appropriate header title
ID	ISBN	Title	Borrowed	Due Back	Borrowed By
6		A Simpe Christian	14/11/2009	28/11/2009	Stevo Allwright

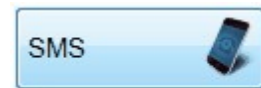
On Loan Assets

This is a list of all Assets that are currently On Loan.

On Loan...					
ID	ISBN	Title	Borrowed	Due Back	Borrowed By
1		The Jesus you Cant Ignore	18/01/2013	01/02/2013	Stevo Allwright

SMS

Pressing the SMS button will start a process to send a reminder text message to the selected person. You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose SMS Message. See [SMS](#) for more information on this area.

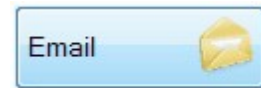


To send the message, simply tick the Send option on the line that contains the phone number to send to, and press the Send button on the toolbar. You can edit the message first by selecting Compose SMS Message.

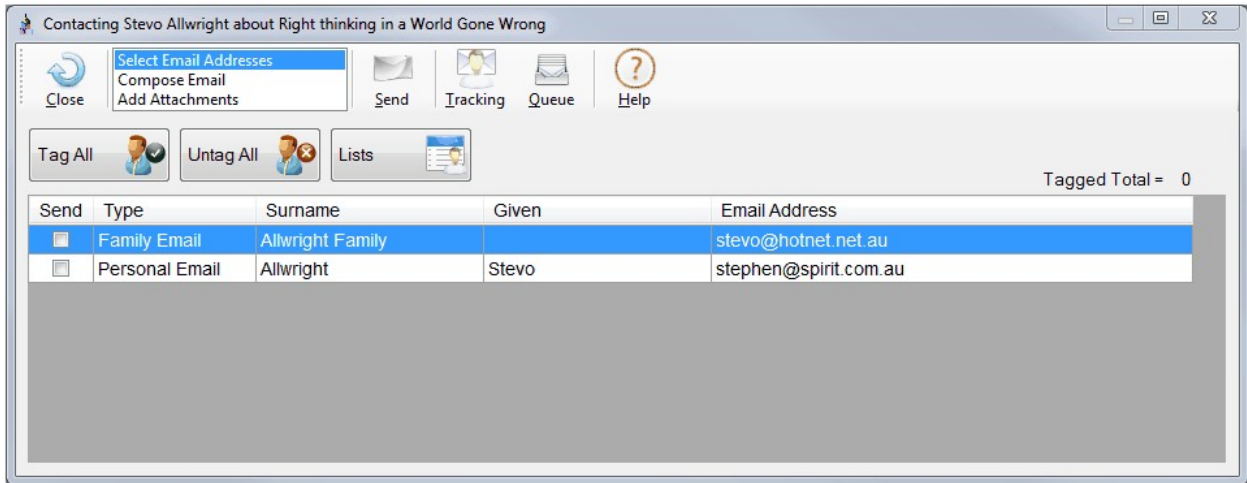
Send	Type	Surname	Given	Phone Number
<input checked="" type="checkbox"/>	Family Mobile	Allwright Family		0444-555-555
<input type="checkbox"/>	Family Phone	Allwright Family		054-33-5478
<input type="checkbox"/>	Family Fax	Allwright Family		NA
<input type="checkbox"/>	Personal Mobile	Allwright	Stevo	0400297025
<input type="checkbox"/>	Business Phone	Allwright	Stevo	018-998725

Email

Pressing the Email button will start a process to send an Email message to the selected person. You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose Email Message. See [Email](#) for more information on this area.

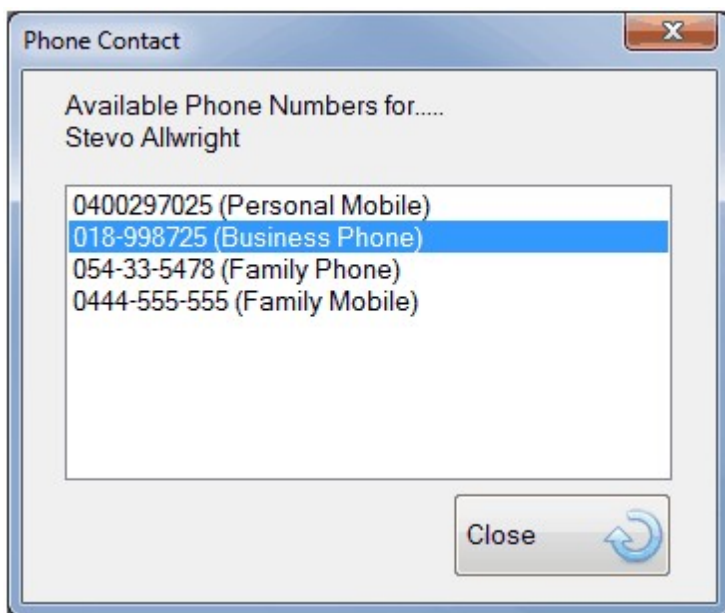


To send the message, simply tick the email address to send to, and press the Send button on the toolbar. You can edit the message first by selecting Compose Email.



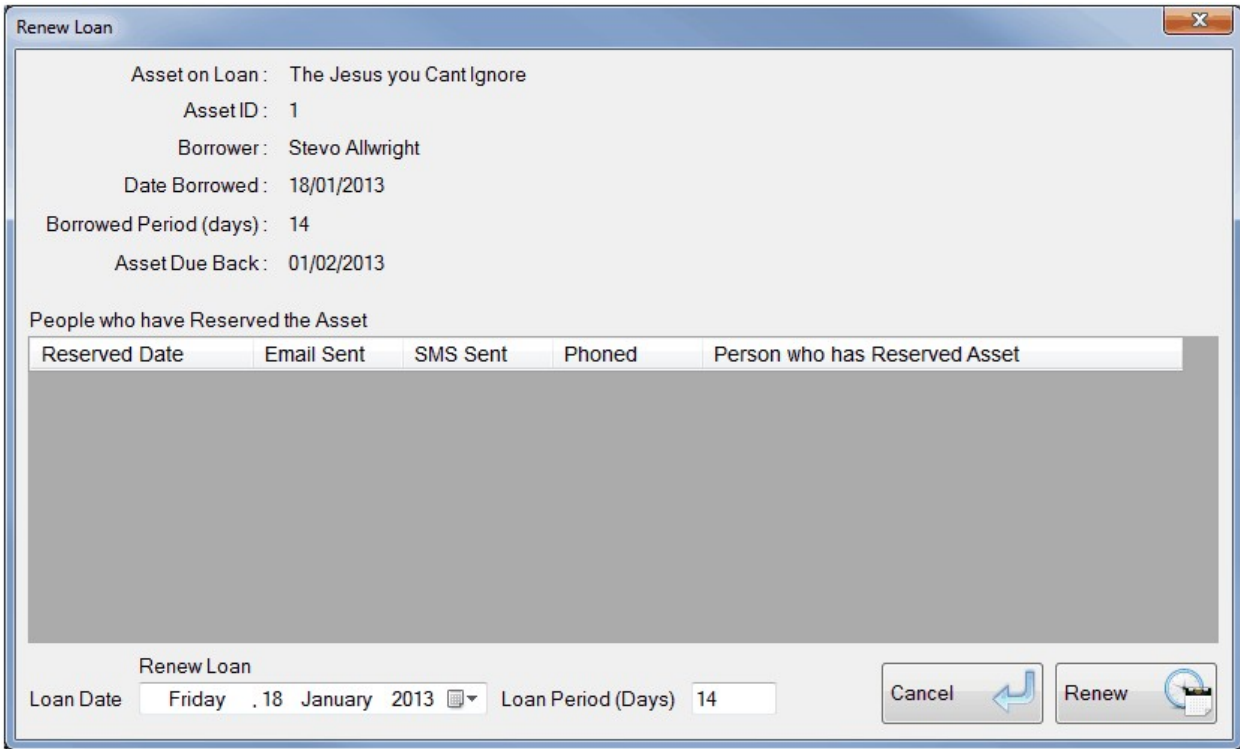
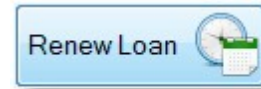
Phone

Press the Phone button to show the following window. This displays all available phone numbers for the selected person in the reserve list.



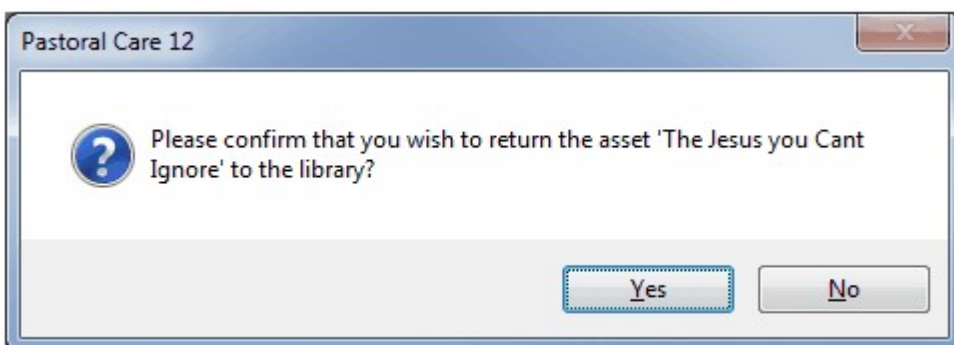
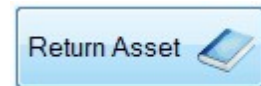
Renew

Press the Renew Loan button to extend a loan period on an asset. Note that this window also shows information on people who might be waiting for this asset to become available, assisting you in deciding if you can extend the loan period.



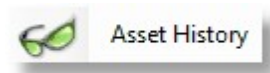
Return

Press the Return Asset button to accept the selected Asset back into the Library.

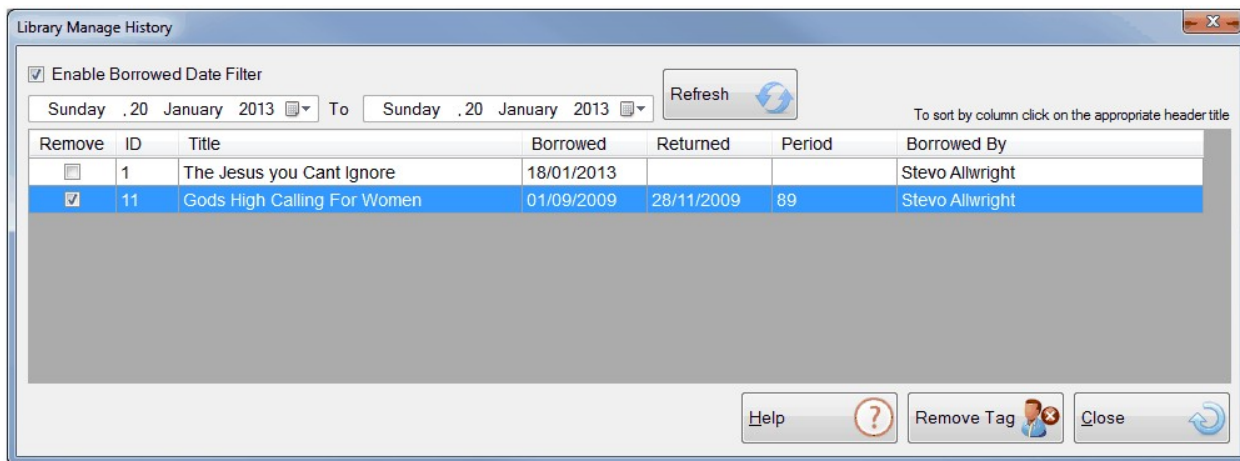


Asset History

Press the Manage - Asset History button to view the following History window.



Click on each part of this window to learn more.



Enable Date Filter

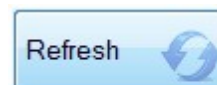


Tick this option and set a date range to filter this list on based on the Borrowed Date of an asset.

Note: You will need to press the [Refresh](#) button to reload the window with the new filter applied.

Refresh

Press the Refresh Button to apply a date range filter you have added with the [Enable Date Filter](#) option.



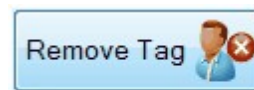
History List

Remove	ID	Title	Borrowed	Returned	Period	Borrowed By
<input type="checkbox"/>	1	The Jesus you Cant Ignore	18/01/2013			Stevo Allwright
<input checked="" type="checkbox"/>	11	Gods High Calling For Women	01/09/2009	28/11/2009	89	Stevo Allwright

This is the list of Historical Information stored in the Library Manager. You can remove an item(s) by ticking the Remove field here, and pressing the [Remove Tag](#) button

Remove Tag

Press this button to clear selected Historical Items from the Library History window.

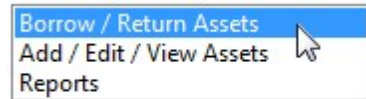


Library Form Area

This area that is shaded is where the [Borrow / Return Assets](#), the [Add / Edit / View Assets](#) and the [Reports](#) forms are all displayed.

Borrow / Return Assets

Selecting the Borrow / Return Assets from the Library Manager Toolbar will open up a range of controls to assist you in loaning out an asset, or having an asset returned to the Library.



Click on each part of this window to learn more. (Note, for clarity, this window is shown with people and assets already loaded.)

Library Manager (Church 1) (Belling South Baptist Church)

File Help

Close Borrow / Return Assets Add / Edit / View Assets Reports Load Manage Filters Process Format Review ToolBox Help

Library Main Church Total Assets 11 On Loan 2 Over Due 1 Reserve's 1

ID	ISBN	Status	Title
1		On Loan	The Jesus you Cant ignore
2		On Shelf	The Truth War
3		On Shelf	Twelve Ordinary Men
4		On Shelf	Twelve Extraordinary Women
5		On Shelf	The Tale of two Sons
6		On Loan	A Simpe Christian

Reserve Loan Loan Date Sunday .20 January 2013 Loan Period (Days) 14

Assets Loaned (Allwright Stevo)

- The Jesus you Cant ignore
- A Simpe Christian

Assets Reserved (Allwright Stevo)

- Right thinking in a World Gone Wrong

Audit Details

Select Library

Select the Library that you want to work with in the Library Manager. The selection here effect all 3 main areas, being [Borrow / Return Assets](#), [Add / Edit / View Assets](#) and [Reports](#).

Library Main Church

Library Statistics

Total Assets 11 On Loan 2 Over Due 1 Reserve's 1

These statistics are accurate for the currently [Selected Library](#)

Loaded People

This is a list of people loaded into the Library Manager with the [Load](#) button on the toolbar.

Select a person to see any assets that they may have on loan, or reserve. Also select a person here to add an asset to their name for loaning out.

- Allwright Stevo
- Allwright maz
- Angel Peter
- Angel Belinda
- Angel Helen
- Anglin Brent
- Anglin Katey

Loaded Assets

ID	ISBN	Status	Title
1		On Loan	The Jesus you Cant Ignore
2		On Shelf	The Truth War
3		On Shelf	Twelve Ordinary Men
4		On Shelf	Twelve Extraordinary Women
5		On Shelf	The Tale of two Sons

This is a list of Assets loaded into the Library Manager with the [Load](#) button on the toolbar.

Select an Asset for loaning this out to the selected person. If you Double Click on an asset, you will load the [Asset History](#) window for the selected Asset.

Asset History

The Asset History window with a single selected asset is shown below.



Click on each part of this window for more information.

Asset History X

Title:

Asset Id: Copy Id's:

History... Total Items: 1 To sort by column click on the appropriate header title

Remove	ID	ISBN	Borrowed	Returned	Period (days)	Borrowed By
☐	1		18/01/2013			Stevo Allwright

Reserved For..... Total Items: 1

Reserved	Email Sent	SMS Sent	Phoned	Name
20/01/2013 10:54 AM	No	No	No	Big Ray Barton

Make Contact...

SMS

Email

Phone

Help

Remove Tag

Close

History List

History...		Total Items: 1				
Remove	ID	ISBN	Borrowed	Returned	Period (days)	Borrowed By
<input type="checkbox"/>	1		18/01/2013			Stevo Allwright

This list shows the history of the selected asset. You can use the [Remove Tag](#) field to tag any records that you want to remove from the history for the selected asset.

Reserved List

Reserved For.....		Total Items: 1			
Reserved	Email Sent	SMS Sent	Phoned	Name	
20/01/2013 10:54 AM	No	No	No	Big Ray Barton	

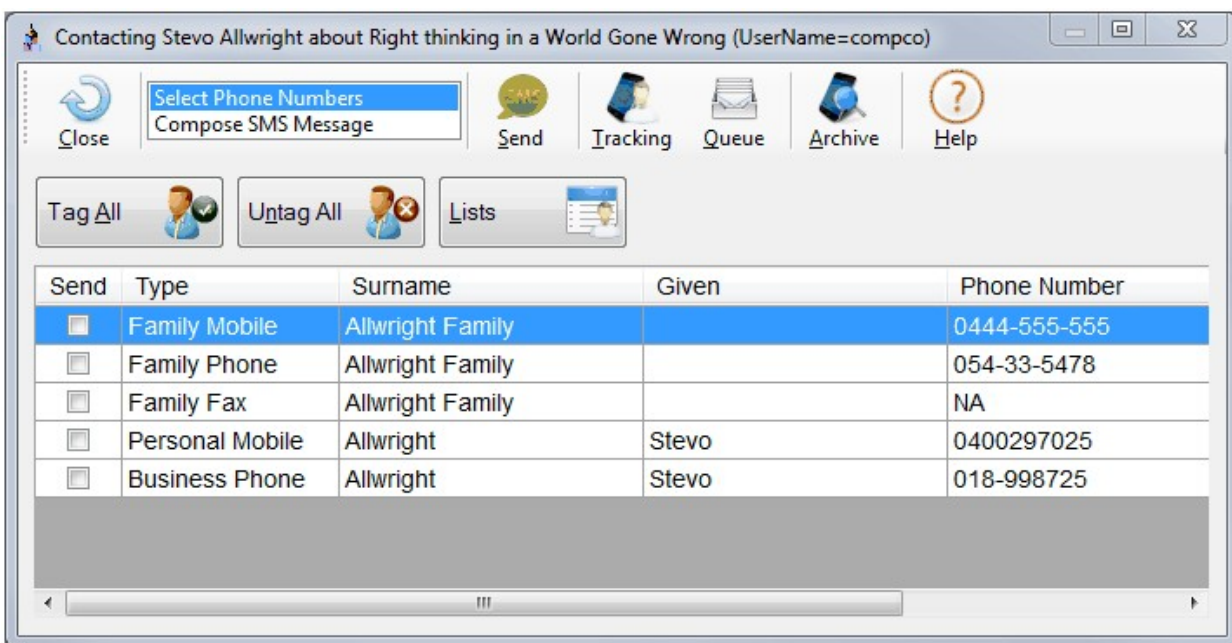
This list shows the people that have the selected asset on reserve for. You can use the [SMS](#), [Email](#) and [Phone](#) buttons for contacting a selected person regarding that asset on reserve.

SMS

Pressing the SMS button will start a process to send a reminder text message to the selected person in the [Reserve List](#). You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose SMS Message. See [SMS](#) for more information on this area.



To send the message, simply tick the Send option on the line that contains the phone number to send to, and press the Send button on the toolbar. You can edit the message first by selecting Compose SMS Message if you wish

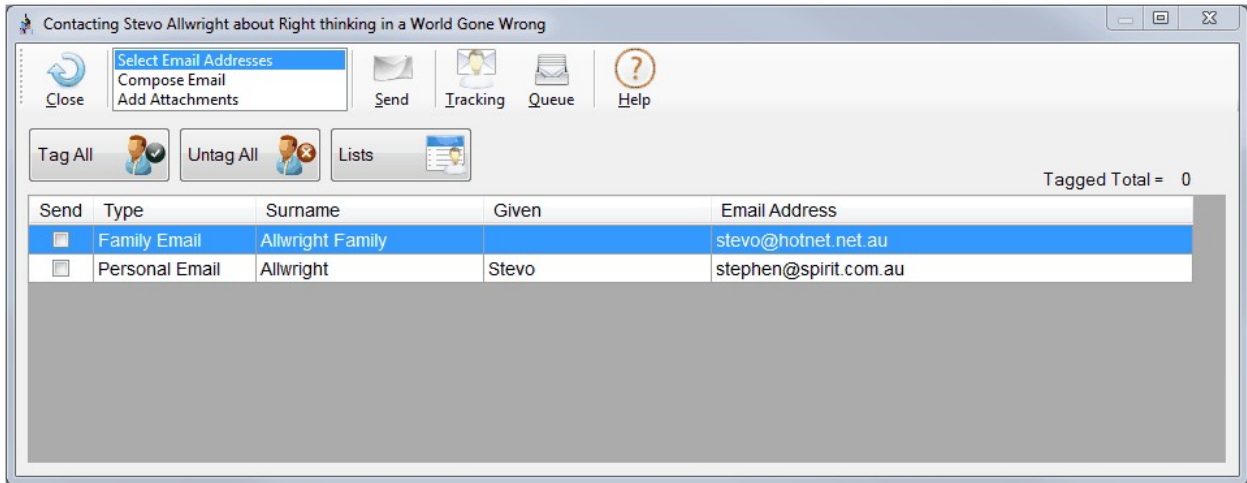


Email

Pressing the Email button will start a process to send a reminder Email message to the selected person in the [Reserve List](#). You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose Email Message. See [Email](#) for more information on this area.

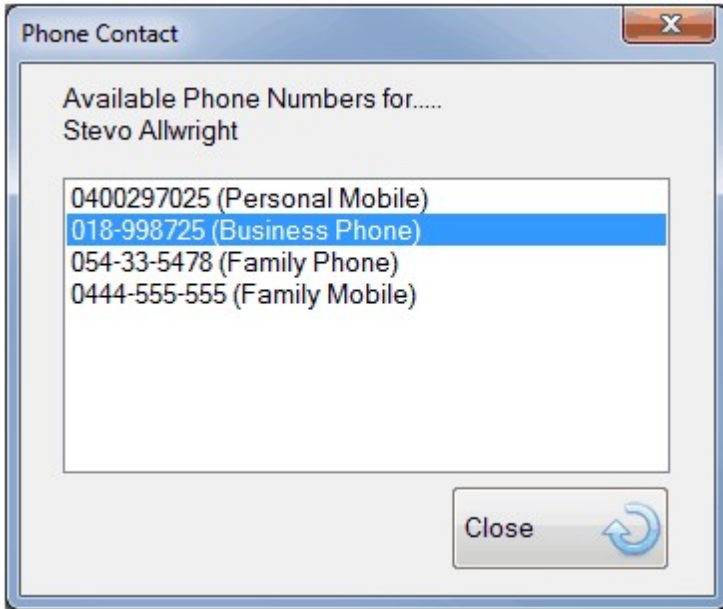
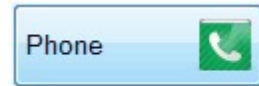


To send the message, simply tick the email address to send to, and press the Send button on the toolbar. You can edit the message first by selecting Compose Email if you wish



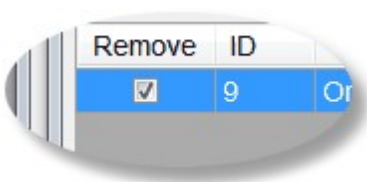
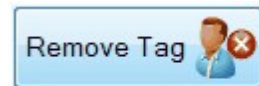
Phone

Press the Phone button to show the following window. This displays all available phone numbers for the selected person in the reserve list.



Remove Tag

Press the Remove Tag button to delete tagged items from the reserve list.



Reserve

Press the Reserve Button to reserve the Selected Asset for the Selected Person. (See below)



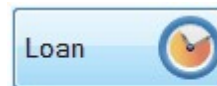
The screenshot shows a software interface for managing church assets. On the left is a list of names, with 'Angel Belinda' highlighted in blue and labeled 'Selected Person'. On the right is a table with columns for ID, ISBN, Status, and Title. The first row is highlighted in blue and labeled 'Selected Asset'. Below the table are buttons for 'Reserve' and 'Loan', and a date field set to 'Sunday .20 January 2013' and a 'Loan Period (Days)' field set to '14'.

ID	ISBN	Status	Title
1		On Loan	The Jesus you Cant Ignore
2		On Shelf	The Truth War
3		On Shelf	Twelve Ordinary Men
4		On Shelf	Twelve Extraordinary W
5		On Shelf	The Tale of two Sons
6		On Loan	A Simpe Christian

Loan Date: Sunday .20 January 2013
Loan Period (Days): 14

Loan

Press the Loan Button to loan out the Selected Asset to the Selected Person. (See below)



ID	ISBN	Status	Title
1		On Loan	The Jesus you Cant Ignore
2		On Shelf	The Truth War
3		On Shelf	Twelve Ordinary Men
4		On Shelf	Twelve Extraordinary Wo
5		On Shelf	The Tale of two Sons
6		On Loan	A Simpe Christian

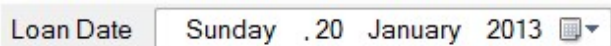
Allwright Stevo
 Allwright maz
 Angel Peter
Angel Belinda (Selected Person)
 Angel Helen
 Anglin Brent
 Anglin Katey
 Anglin Mathew
 Anglin Levi
 Anglin Kerry
 Baker Josh
 Baker Ruthie
 Baker Gary

Reserve Loan

Loan Date: Sunday .20 January 2013
 Loan Period (Days): 14

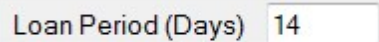
Loan Date

The default loan date is the current date. You can change this here if you need to back date or forward date the loan date manually.



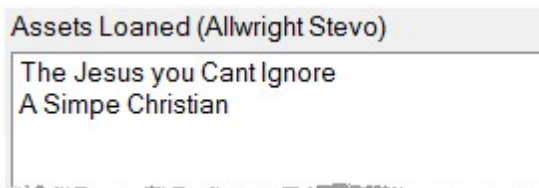
Loan Period

The Default Loan Period is filled in from the Library Settings area ([Setup Library Manager](#)), if you want to reduce or extend this manually, you can do so here.



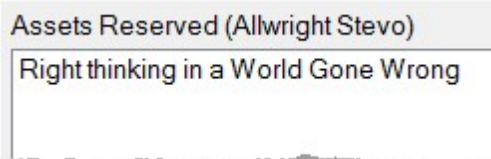
Assets Loaned

This is a list of assets loaned out to the selected person. Their name is shown just above this list for quick reference.



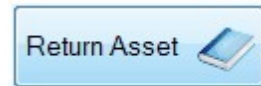
Assets Reserved

This is a list of assets on reserve for the selected person. Their name is shown just above this list for quick reference.



Return Asset

Press the Return Asset button to return the selected Asset from the currently selected person.



If you Return an asset, and that asset is currently reserved for another person, the Request to Loan window opens up giving you a few options to notify someone that an asset on reserve has become available.

Request To Load

This window opens up when an asset that has been reserved for a person has just been returned and is now available to go On Hold, or be loaned out to the person waiting for that asset to become available.



Click on each part of this window to learn more.



Reserved List

This list shows all people with the asset in question that have that asset on reserve. The person who has had the asset on reserve the longest is at the top of the list.

Place On Hold

Leave this option ticked to let Pastoral Care change the status of the asset to On Hold after you have contacted a person. This will help Pastoral Care to remind people loaning the asset out again that is currently on hold for a specific individual.

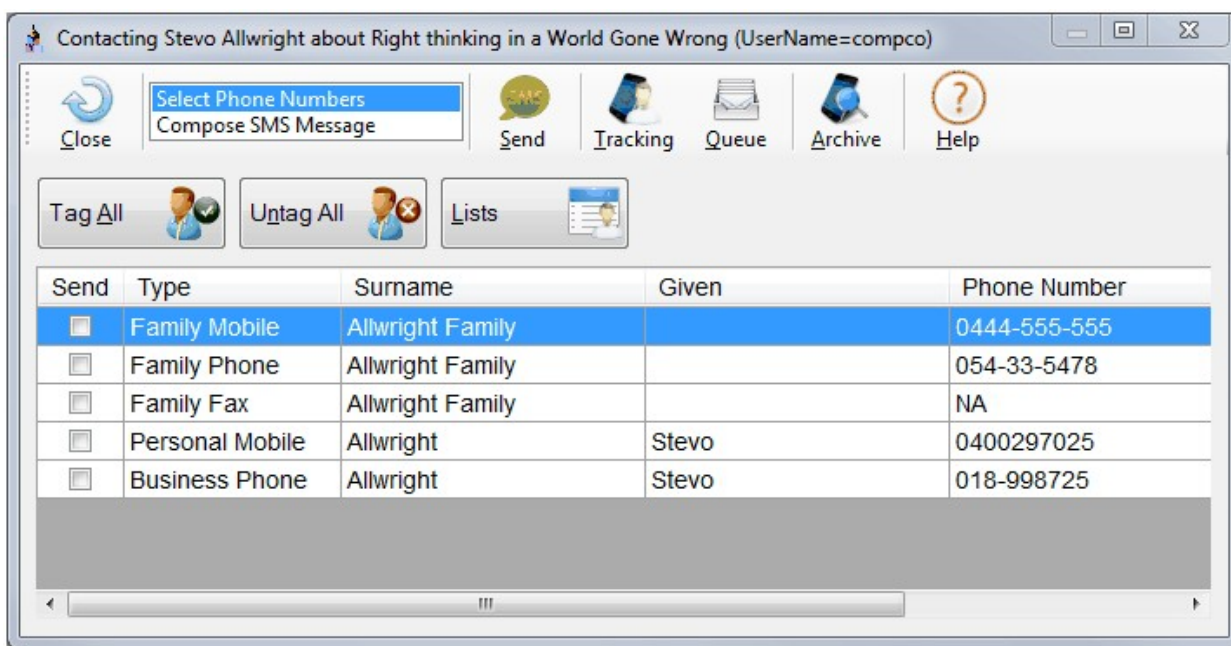
Place Asset 'On Hold' after contacting them

SMS

Pressing the SMS button will start a process to send a reminder text message to the selected person in the [Reserve List](#). You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose SMS Message. See [SMS](#) for more information on this area.



To send the message, simply tick the Send option on the line that contains the phone number to send to, and press the Send button on the toolbar. You can edit the message first by selecting Compose SMS Message if you wish

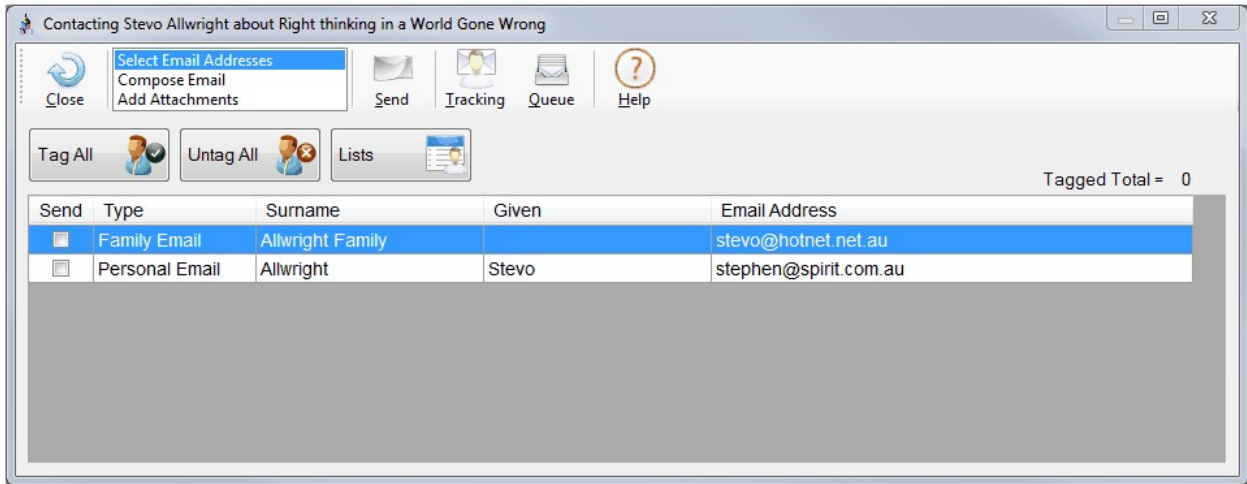


Email

Pressing the Email button will start a process to send a reminder Email message to the selected person in the [Reserve List](#). You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose Email Message. See [Email](#) for more information on this area.

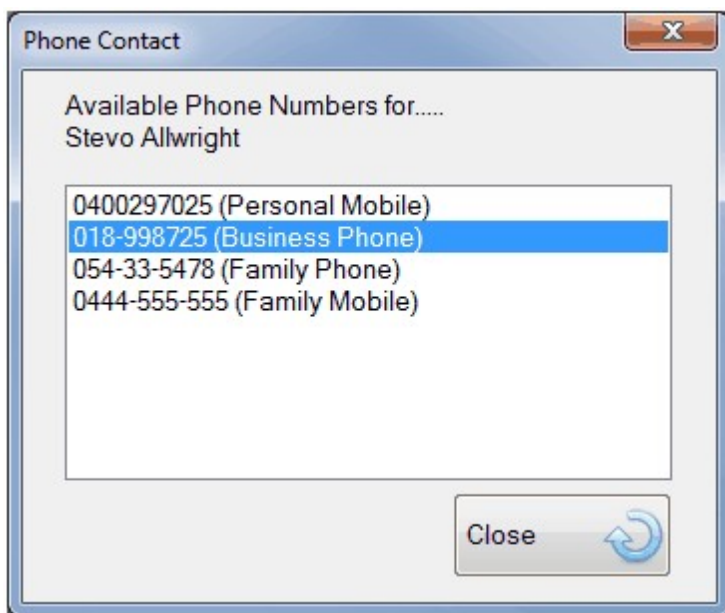
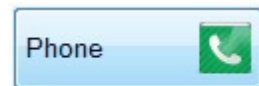


To send the message, simply tick the email address to send to, and press the Send button on the toolbar. You can edit the message first by selecting Compose Email if you wish



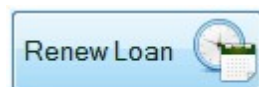
Phone

Press the Phone button to show the following window. This displays all available phone numbers for the selected person in the reserve list.



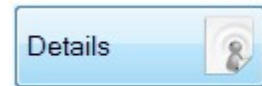
Renew Loan

Press the Renew Loan button to renew (extend) a loan period for the selected Asset from the currently selected person.



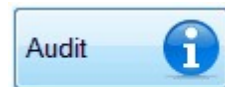
Details

After selecting an asset in the [Assets Reserved](#) list, you can press the Details Button to find out more about this asset and it's current reserve status.



Audit

The Audit button opens up an audit trail for the currently selected person. You can clear Loan History items by ticking the Remove flag on each item to remove, and pressing the Remove Tag button. You can also run a detailed Audit Report for the current person by pressing the Report Button on this window.



Individual Audit ✕

Audit for Stevo Allwright

On Loan... To sort by column click on the appropriate header title

ID	ISBN	Borrowed	Due Back	Title
1		18/01/2013	01/02/2013	The Jesus you Cant Ignore

Over Due Loaned Assets...

ID	ISBN	Borrowed	Due Back	Title
6		14/11/2009	28/11/2009	A Simpe Christian

Reserved Assets...

ID	ISBN	Status	Email Sent	SMS Sent	Phoned	Title
9		On Shelf	No	20/01/2013	20/01/2013	Right thinking in a World Gone Wrong

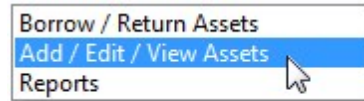
Loan History...

Remove	ID	ISBN	Borrowed	Returned	Period (days)	Title
<input type="checkbox"/>	1		18/01/2013			The Jesus you Cant Ignore
<input type="checkbox"/>	11		01/09/2009	28/11/2009	89	Gods High Calling For Women

Help ?
Report
Remove Tag
Close

Add / Edit / View Assets

Selecting the Add / Edit / View Assets from the Library Manager Toolbar will open up a range of controls to assist you in the maintenance of your asset list.



Click on each part of this window to learn more. (Note, for clarity, this window is shown with sample assets already loaded.)

ID	ISBN	Copy	Type	Category	Status	Title	Author
1		P	Book	Teaching	On Loan	The Jesus you Cant Ignore	Joh
2		P	Book	Teaching	On Shelf	The Truth War	Joh
3		P	Book	Teaching	On Shelf	Twelve Ordinary Men	Joh
4		P	Book	Teaching	On Shelf	Twelve Extraordinary Women	Joh
5		P	Book	Teaching	On Shelf	The Tale of two Sons	Joh
6		P	Book	Teaching	On Loan	A Simpe Christian	Joh
7		P	Book	Teaching	On Shelf	Why we Beleive the Bible?	Joh
8		P	Book	Bible	On Shelf	NKJV Macarthur Study Bible	Joh
9		P	Book	Teaching	On Shelf	Right thinking in a World Gone Wrong	Joh
10		P	Book	Teaching	On Shelf	Truth for Today	Joh
11		P	Book	Teaching	On Shelf	Gods High Calling For Women	Joh
12		C	Book	*Theology*	On Shelf	The Truth War	Joh

Add

Pressing the Add Button will open up the Add New Asset window (shown below)



Click on each part of this window for more information on adding a new asset.

Add Asset

Added Date

Copy

ISBN

Title

Author

Comment

Asset Type

Status

Loan Period (days)

Category

- Family Life
- Commentary
- Counselling
- Bible
- Fiction
- Theology
- Children

Add Asset to Bar Code Print Report

Help Mask Save

Added Date

This is the date that the Asset was added to the Library, or is being added to the Library.

Added Date Sunday .20 January 2013

Copy

By default, all assets added to a Library are a Primary Copy. That is, they are a single item, with no duplicates in the Library. If you are editing / adding a Copy, please select Copy from this option, and use the pop up screen to select the Primary Asset to link the copy to.

Copy Primary

Pop Up Copy Link window...

Add Asset as a Copy

Please choose which Primary Asset that you wish to add a copy to...

ID	ISBN	Title	Author
1		The Jesus you Cant Ignore	John Macarthur
2		The Truth War	John Macarthur
3		Twelve Ordinary Men	John Macarthur
4		Twelve Extraordinary Women	John Macarthur
5		The Tale of two Sons	John Macarthur
6		A Simpe Christian	John Macarthur
7		Why we Beleive the Bible?	John Macarthur
8		NKJV Macarthur Study Bible	John Macarthur
9		Right thinking in a World Gone Wrong	John Macarthur
10		Truth for Today	John Macarthur
11		Gods High Calling For Women	John Macarthur
13		Gods Grand Plan for your life	K Sanders
14		Peter, Jesus Favourite	K Sanders
15		God has a sense of Humour	J Peters
16		The Book Of Mathew	Larry P Smythe
17		The Book Of Mark	Larry P Smythe
18		The Book Of Luke	Larry P Smythe
19		The Book Of John	Larry P Smythe
20		The Book Of Acts	Larry P Smythe
21		The Book Of Romans	Larry P Smythe
22		The Book Of 1st Corinthians	Larry P Smythe
23		The Book Of 2nd Corinthians	Larry P Smythe

To sort by column click on the appropriate header title

Place Primary edition details into copy edition

Cancel Add Copy

ISBN

An ISBN number is an "International Standard Book Number". This is a ten- or thirteen-digit number assigned to every book before publication.

ISBN

If you have entered an ISBN number from a book, you can press the [Review](#) button to check out that book online for more information regarding that publication.

Title

Title

Enter the Title of the Book / DVD etc.

Author

Author

Enter the Author(s) name here.

Comment

Comment

Enter a short descriptive comment here.

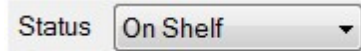
Asset Type

Asset Type

Select the Asset Type for the new asset you are creating.

Status

The Following Status's can be selected for the status of an Asset. These are system created Status's that cannot be edited.

A screenshot of a web interface showing a dropdown menu for selecting an asset status. The menu is titled "Status" and currently displays "On Shelf" with a downward-pointing arrow on the right side.

- On Shelf** An Asset that is On Shelf is available for borrowing.

- On Loan** An Asset that is On Loan is not available for borrowing until it is returned.

- On Hold** An Asset that is On Hold is a Status you can use for the Library to Hold an item from loaning out. This groups items into a Hold category, but will not physically stop you from loaning out an item if you choose to.

- In Repair** An Asset that is In Repair has been marked as needing repair. If you try and loan out an Asset with this status, a warning message will tell you that you are about to change a status from In Repair to On Loan.

- Lost** An Asset that is Lost cannot be loaned out without changing its status. If you try and loan out an Asset with this status, a warning message will tell you that you are about to change a status from In Lost to On Loan. The asset will not return to a state of Lost after that asset is returned, as (obviously) it has been found again!

- Archived** An Asset that is Archived has been marked as being put away, not for borrowing. If you try and loan out an Asset with this status, a warning message will tell you that you are about to change a status from Archived to On Loan.

The asset will not return to a state of Archived after that asset is returned, as re-loaning the asset indicates that you have decided to put that asset back into circulation.

Loan Period

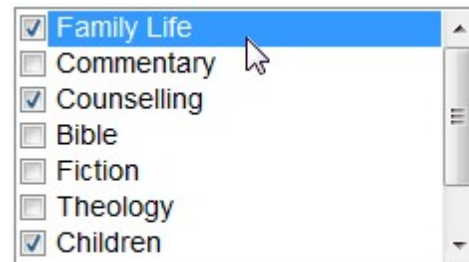
Enter the loan period in days for the Asset you are adding or editing. The Library Default loan period is recorded automatically, however you can change that for selected assets manually with this field.

Loan Period (days)

Category

An asset can participate in multiple categories. This way, when you are searching for an asset on a particular theme, you are more likely to be able to find the asset you are looking for.

In the example above, the asset is related to Family and Children Counseling.



Bar Code

Tick this option to allow this asset to be printed on Bar Code reports. (ie: You want to use a Pastoral Care generated bar code for managing this asset)

Add Asset to Bar Code Print Report

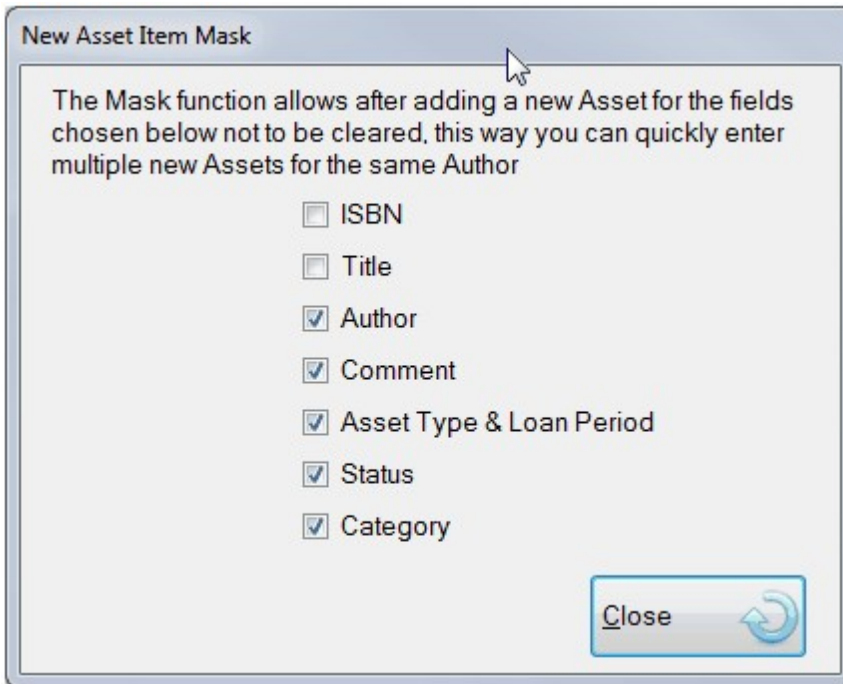
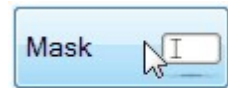
Review

Press the Review Button to allow Pastoral Care to do a search on the internet for book information using the ISBN number entered. This will not work without an ISBN number.



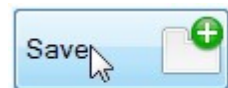
Mask

The Mask Feature allows any ticked fields to stay filled in for each new asset you add. This is ideal if you are adding multiple items for say the same Author, Same Theme etc.



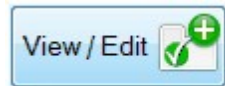
Save

Save your edit's or additions to the Library.



View / Edit

The View Edit button on the [Add / Edit / View Assets](#) window opens up the following window. This window is pre-loaded with information from the currently selected asset, allowing you to make any changes to that asset.



Click on any part of the View Edit screen below to learn more.

View / Edit Asset

Added Date

Copy

ISBN

Title

Author

Comment

Asset Type

Status

Loan Period (days)

Category

- Family Life
- Commentary
- Counselling
- Bible
- Fiction
- Theology
- Children

Add Asset to Bar Code Print Report

Help

Added Date

This is the date that the Asset was added to the Library.

Added Date Sunday .20 January 2013

Copy

By default, all assets added to a Library are a Primary Copy. That is, they are a single item, with no duplicates in the Library. If you are editing / adding a Copy, please select Copy from this option, and use the pop up screen to select the Primary Asset to link the copy to.

Copy Primary

Pop Up Copy Link window...


Add Asset as a Copy

Please choose which Primary Asset that you wish to add a copy to...

ID	ISBN	Title	Author
1		The Jesus you Cant Ignore	John Macarthur
2		The Truth War	John Macarthur
3		Twelve Ordinary Men	John Macarthur
4		Twelve Extraordinary Women	John Macarthur
5		The Tale of two Sons	John Macarthur
6		A Simpe Christian	John Macarthur
7		Why we Beleive the Bible?	John Macarthur
8		NKJV Macarthur Study Bible	John Macarthur
9		Right thinking in a World Gone Wrong	John Macarthur
10		Truth for Today	John Macarthur
11		Gods High Calling For Women	John Macarthur

To sort by column click on the appropriate header title

Place Primary edition details into copy edition

Add Copy 

ISBN

An ISBN number is an "International Standard Book Number". This is a ten- or thirteen-digit number assigned to every book before publication.

ISBN

If you have entered an ISBN number from a book, you can press the [Review](#) button to check out that book online for more information regarding that publication.

Title

Title

Edit the Title of the Book / DVD etc.

Author

Author

Edit the Author(s) name here.

Comment

Comment

Edit a short descriptive comment here.

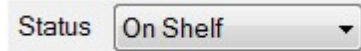
Asset Type

Select the Asset Type for the new asset you are creating.

Asset Type

Status

The Following Status's can be selected for the status of an Asset. These are system created Status's that cannot be edited.

A screenshot of a web interface showing a dropdown menu for selecting an asset status. The menu is titled "Status" and currently displays "On Shelf" with a downward-pointing arrow on the right side.

- On Shelf** An Asset that is On Shelf is available for borrowing.
- On Loan** An Asset that is On Loan is not available for borrowing until it is returned.
- On Hold** An Asset that is On Hold is a Status you can use for the Library to Hold an item from loaning out. This groups items into a Hold category, but will not physically stop you from loaning out an item if you choose to.
- In Repair** An Asset that is In Repair has been marked as needing repair. If you try and loan out an Asset with this status, a warning message will tell you that you are about to change a status from In Repair to On Loan.
- Lost** An Asset that is Lost cannot be loaned out without changing it's status. If you try and loan out an Asset with this status, a warning message will tell you that you are about to change a status from In Lost to On Loan. The asset will not return to a state of Lost after that asset is returned, as (obviously) it has been found again!
- Archived** An Asset that is Archived has been marked as being put away, not for borrowing. If you try and loan out an Asset with this status, a warning message will tell you that you are about to change a status from Archived to On Loan.
- The asset will not return to a state of Archived after that asset is returned, as re-loaning the asset indicates that you have decided to put that asset back into circulation.

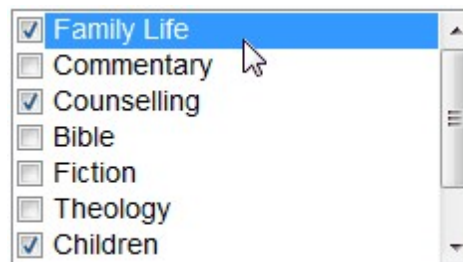
Loan Period

Enter the loan period in days for the Asset you are adding or editing. The Library Default loan period is recorded automatically, however you can change that for selected assets manually with this field.

Loan Period (days)

Category

An asset can participate in multiple categories. This way, when you are searching for an asset on a particular theme, you are more likely to be able to find the asset you are looking for. In the example right, the asset is related to Family and Children Counseling.



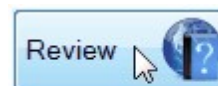
Bar Code

Tick this option to allow this asset to be printed on Bar Code reports. (ie: You want to use a Pastoral Care generated bar code for managing this asset)

Add Asset to Bar Code Print Report

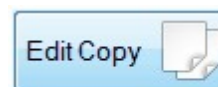
Review

Press the Review Button to allow Pastoral Care to do a search on the internet for book information using the ISBN number entered. This will not work without an ISBN number.



Edit Copy

The Edit Copy features lets you re-assign the master asset that the current selected asset is linked to as a copy.



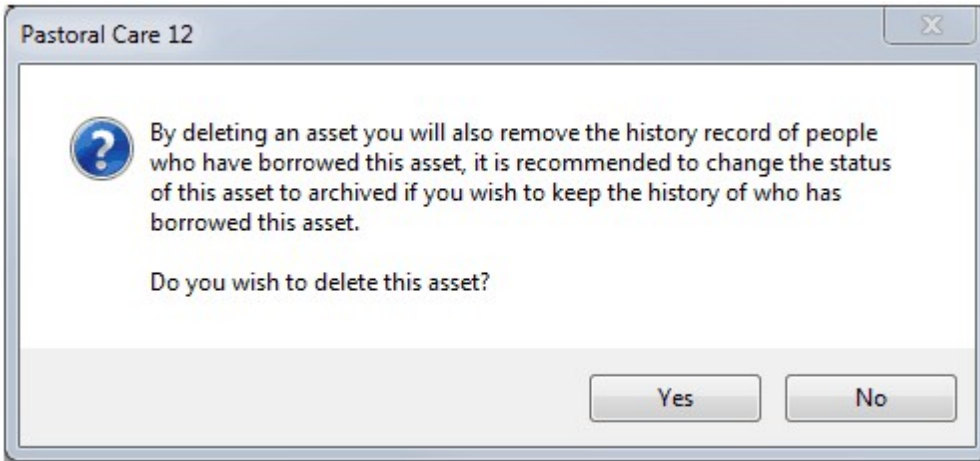
Update

Save your edit's to the asset.



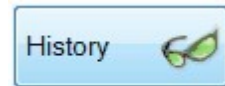
Delete

The Delete button in the [Add / Edit / View Assets](#) window lets you totally remove the selected asset from the Library. This delete (as with all deletes in Pastoral Care) cannot be undone.



Asset History

Pressing the History Button in the [Add / Edit / View Assets](#) window will open the Asset History window for the single selected asset.



Click on each part of this window for more information.

Asset History

Title:

Asset Id: Copy Id's:

History... Total Items: 1 To sort by column click on the appropriate header title

Remove	ID	ISBN	Borrowed	Returned	Period (days)	Borrowed By
[X]	1		18/01/2013			Steve Alwright

Reserved For..... Total Items: 1

Reserved	Email Sent	SMS Sent	Phoned	Name
20/01/2013 10:54 AM	No	No	No	Big Ray Barton

Make Contact..

SMS

Email

Phone

Help

Remove Tag

Close

History List

History...		Total Items: 1				
Remove	ID	ISBN	Borrowed	Returned	Period (days)	Borrowed By
<input type="checkbox"/>	1		18/01/2013			Stevo Allwright

This list shows the history of the selected asset. You can use the [Remove Tag](#) field to tag any records that you want to remove from the history for the selected asset.

Reserved List

Reserved For.....		Total Items: 1			
Reserved	Email Sent	SMS Sent	Phoned	Name	
20/01/2013 10:54 AM	No	No	No	Big Ray Barton	

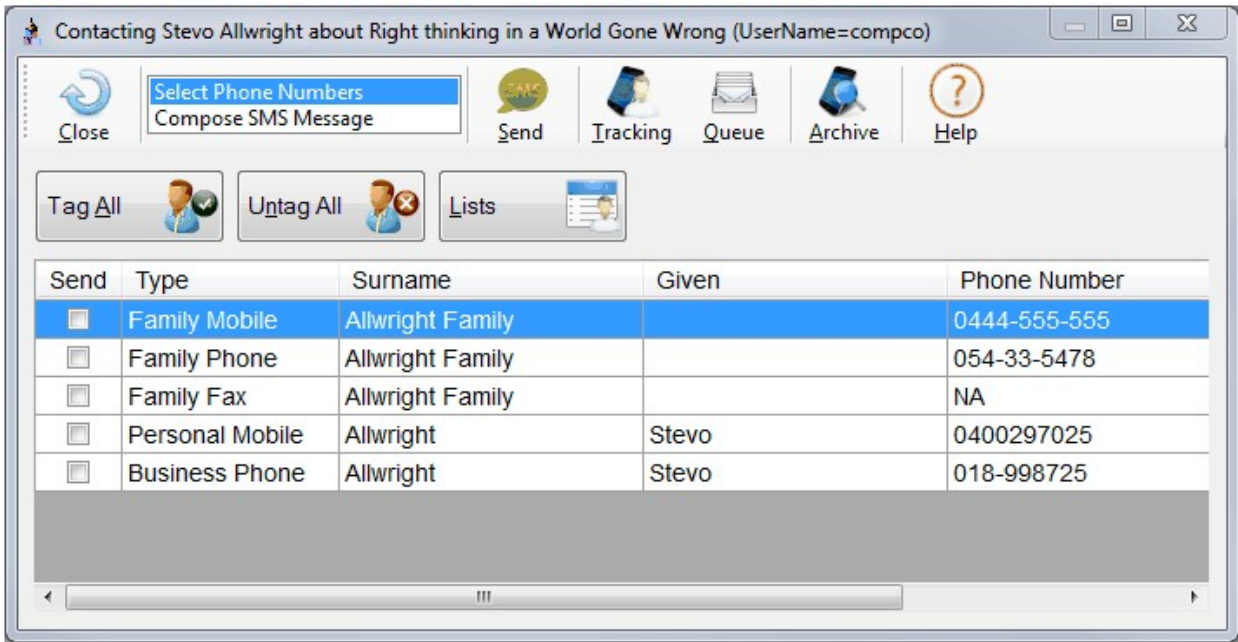
This list shows the people that have the selected asset on reserve for. You can use the [SMS](#), [Email](#) and [Phone](#) buttons for contacting a selected person regarding that asset on reserve.

SMS

Pressing the SMS button will start a process to send a reminder text message to the selected person in the [Reserve List](#). You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose SMS Message. See [SMS](#) for more information on this area.

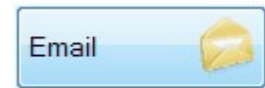


To send the message, simply tick the Send option on the line that contains the phone number to send to, and press the Send button on the toolbar. You can edit the message first by selecting Compose SMS Message if you wish

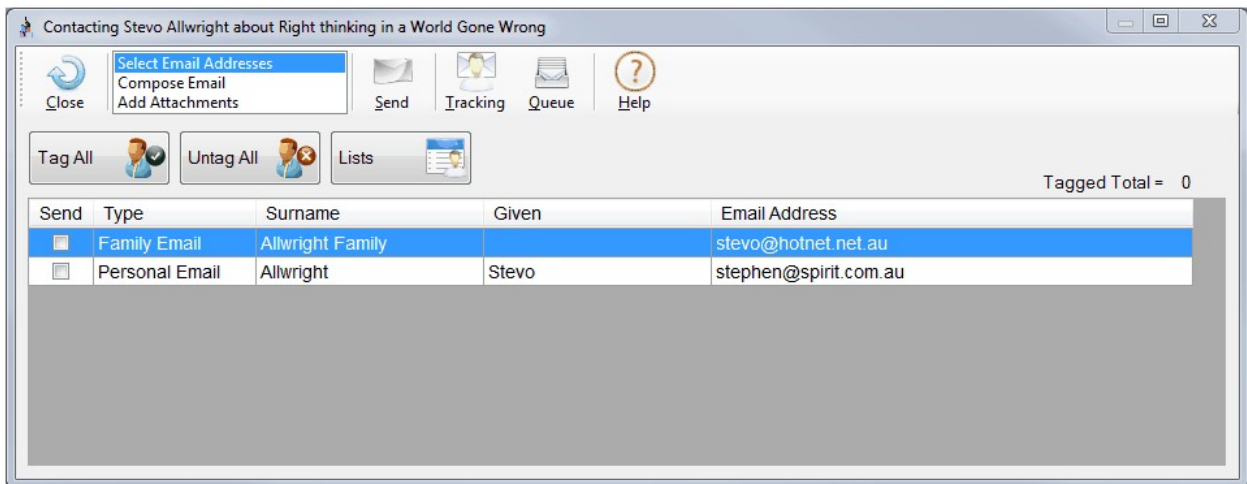


Email

Pressing the Email button will start a process to send a reminder Email message to the selected person in the [Reserve List](#). You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose Email Message. See [Email](#) for more information on this area.

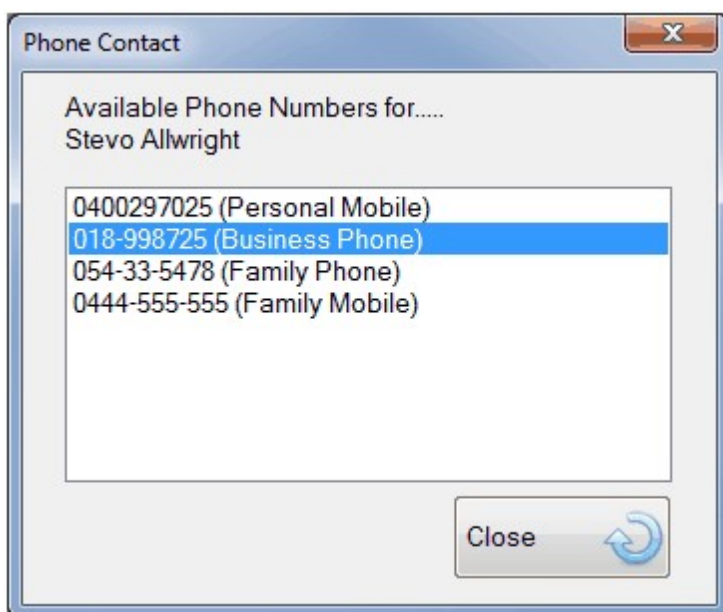
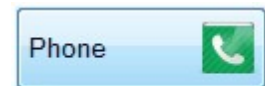


To send the message, simply tick the email address to send to, and press the Send button on the toolbar. You can edit the message first by selecting Compose Email if you wish



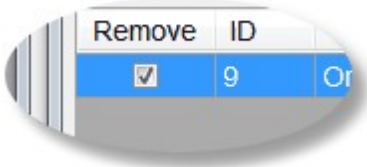
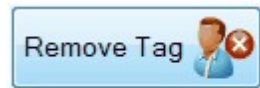
Phone

Press the Phone button to show the following window. This displays all available phone numbers for the selected person in the reserve list.



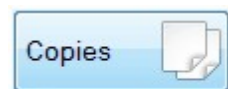
Remove Tag

Press the Remove Tag button to delete tagged items from the reserve list.



Copies

Pressing the Copies button on the [Add / Edit / View Assets](#) will show you details on any additional asset copies for the selected Asset. Note, if no asset copies are available for the selected asset, this button will be disabled.



Statistics

If a person has an asset on Reserve or on Loan, then that information will be displayed when the asset is selected in the [Add / Edit / View Assets](#) window.

Borrower	Stevo Allwright		
Borrowed	18/01/2013	Due	01/02/2013
Reserved	1		

Asset Grid

This grid displays all assets that have been loaded. There are many asset fields represented in this grid. See [Asset Grid Fields](#) for more information.

ID	ISBN	Copy	Type	Category	Status	Title
1		P	Book	Teaching	On Loan	The Jesus you Cant Ignore
2		P	Book	Teaching	On Shelf	The Truth War
3		P	Book	Teaching	On Shelf	Twelve Ordinary Men
4		P	Book	Teaching	On Shelf	Twelve Extraordinary Women
5		P	Book	Teaching	Archived	The Tale of two Sons
6		P	Book	Teaching	On Loan	A Simpe Christian
7		P	Book	Teaching	On Shelf	Why we Beleive the Bible?
8		P	Book	Bible	On Shelf	NKJV Macarthur Study Bible
9		P	Book	Teaching	On Shelf	Right thinking in a World Gone Wrong
10		P	Book	Teaching	On Shelf	Truth for Today

Asset Grid Fields

The following fields are displayed in the Asset Grid on the [Add / Edit / View Assets](#) window.

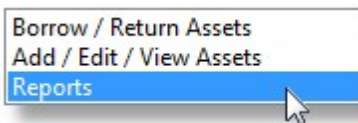
FIELD NAME	EDITABLE	DESCRIPTION
ID	NO	Unique Database Assigned number.
ISBN	YES	International Standard Book Number.
COPY	YES	Displays a P for Primary, and C for Copy
TYPE	YES	Type of Asset. These can be setup in Setup Library Manager
CATEGORY	YES	Asset Category/ Categories. These can be setup in Setup Library Manager
STATUS	YES	System Assigned Status. Status are fixed in Pastoral Care, but the user can assign each status to any asset.
TITLE	YES	Title of the Asset : EG CD Title, Book Title, Equipment Name etc
AUTHOR	YES	Author of the Asset, for equipment, could be manufacturer.
LOANED BY	NO	Name of person who currently has the asset on loan.
LOANED	NO	Date the asset was loaned out on
DUE	NO	Date the asset is due back
LOAN (Days)	NO	How many days the asset has been loaned out for in total
RESERVED	NO	How many people have the asset on reserve
RESERVED PRIMARY AND COPIES	NO	How many people have the Primary and or Copies reserved
COPIES	NO	How many copies on the asset are available
COPIES ID	NO	ID numbers of the Copies
ADDED	YES	Date the asset was added to the Library Manager
COMMENTS	YES	Comments about the asset.

Reports

The Reports area for the Library Manager are designed to make managing your Library that much more simpler than just keeping manual records. If you have a large library, consider investing in a bar code scanner (Available from our web site) and using [Assets Barcodes](#) to label your assets. This makes loaning out and returning far more accurate, and faster as well!

The report output in the Library Manager is identical to all report areas of Pastoral Care. You can find complete information on the report output control window in the area titled [The Report Viewer](#).

Also common to Pastoral Care reports is the use of the [Filters](#) and [Format](#) options that are completely described in the Create Reports chapter.

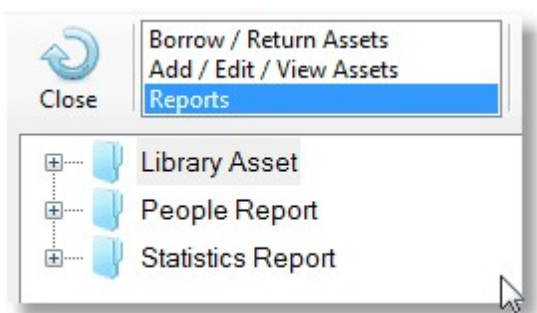


Pre Flight Options

Almost all reports in this area can be manipulated with the use of the standard [Filters](#) and [Format](#) toolbar buttons, and in addition to these options, most reports also have what we call a Pre-Flight window. This is a popup window that has additional report filters and options that are specific to that report or a group of reports. Make sure you check out each pre-flight screen that is explained with each report / group of reports.

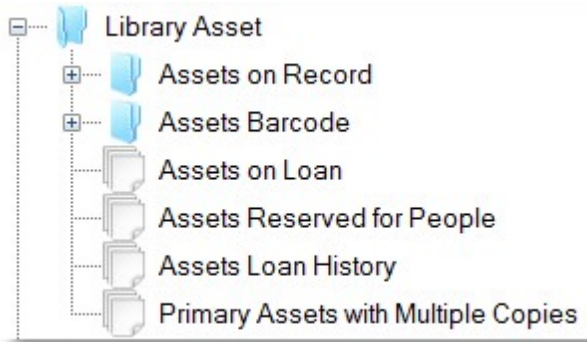
Library Report Types

There are 3 main groupings of reports found in the Library Manager reports area. Click on each one below to learn more...



Library Assets

The Library Assets Reports all focus on information and management of your Assets. Click on each report and reporting group below to learn more.



Assets On Record

Shown below are the Assets On Record Reports. Click on each report for more information and a sample report.



Catalogue

This report is designed to assist you by keeping a printed record of all assets (or selected asset groups) in your Library.

See [Pre-Flight Options](#) and [Sample Report](#) for more details.

Pre-Flight Options

Shown below are the Pre-Flight options for the Catalogue Report. See also [Sample Report](#) to see what this report looks like.



Click on each area for more information

Library Report Setup

<p>Filter - Asset Type</p> <input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine	<p>Filter - Category</p> <input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching	<p>Filter - Status</p> <input type="checkbox"/> On Shelf <input type="checkbox"/> On Loan <input type="checkbox"/> On Hold <input type="checkbox"/> In Repair <input type="checkbox"/> Lost <input type="checkbox"/> Archived
<p>Fields to Include</p> <input checked="" type="checkbox"/> ISBN <input checked="" type="checkbox"/> Author <input type="checkbox"/> Asset Type <input checked="" type="checkbox"/> Category <input type="checkbox"/> Added Date <input type="checkbox"/> Comment <input type="checkbox"/> Status <input checked="" type="checkbox"/> Loan Period <input type="checkbox"/> Copy Type	<p>Sort Order</p> <input checked="" type="radio"/> Title <input type="radio"/> Asset ID <input type="radio"/> ISBN <input type="radio"/> Asset Type <input type="radio"/> Status <input type="radio"/> Author <input type="radio"/> Added Date	<p>Copies</p> <input checked="" type="radio"/> Primary & Copy <input type="radio"/> Primary <input type="radio"/> Copy <input type="checkbox"/> Filter on Added Date 22/01/2013 <input type="text"/> To 22/01/2013 <input type="text"/>

Filters

Filter - Asset Type	Filter - Category	Filter - Status
<input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine	<input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching	<input type="checkbox"/> On Shelf <input type="checkbox"/> On Loan <input type="checkbox"/> On Hold <input type="checkbox"/> In Repair <input type="checkbox"/> Lost <input type="checkbox"/> Archived

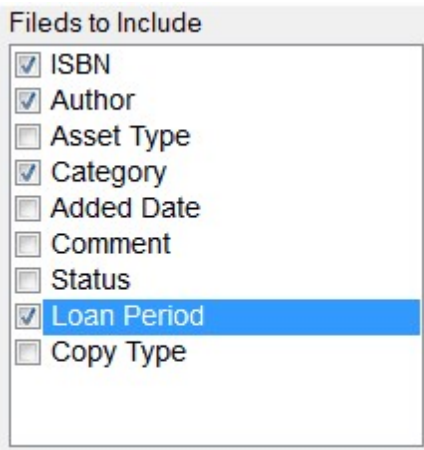
Filters in this pre-flight are all inclusive filters. That is, if you do not tick any filters, then all information from all areas is included. If you tick say 3 Categories, then those 3 Categories are included and all other Categories are excluded. This is true for each filter shown above.

Sort Order

Sort Order
<input checked="" type="radio"/> Title
<input type="radio"/> Asset ID
<input type="radio"/> ISBN
<input type="radio"/> Asset Type
<input type="radio"/> Status
<input type="radio"/> Author
<input type="radio"/> Added Date

Choose the order to sort the report by.

Fields To Include

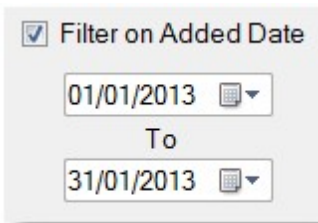


Fields to Include

- ISBN
- Author
- Asset Type
- Category
- Added Date
- Comment
- Status
- Loan Period
- Copy Type

In addition to the title field, tick the addition fields that you want on the report.

Date Filter



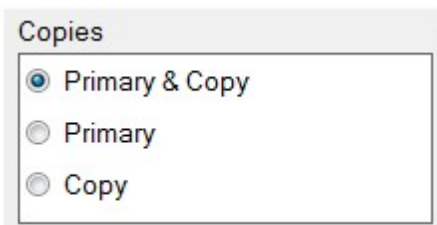
Filter on Added Date

01/01/2013 To 31/01/2013

Select to filter on the Date Field of Date Added. (Date the asset was added to the Library Manager)

In the example above, we are filtering for assets added in January 2013

Copies

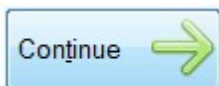


Copies

- Primary & Copy
- Primary
- Copy

Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.

Continue



Press the Continue Button to run the selected report.

Sample Report

Sample Catalogue Report shown below...

Library Catalogue - Main Church

A Simpe Christian

ID: 6

Author: John Macarthur

Category Teaching

Loan Period (days): 14

Gods High Calling For Women

ID: 11

Author: John Macarthur

Loan Period (days): 14

NKJV Macarthur Study Bible

ID: 8

Author: John Macarthur

Category Bible

Loan Period (days): 14

Right thinking in a World Gone Wrong

ID: 9

Author: John Macarthur

ID, Title, Author, Status

This report does not include a Field Selection option in the [Pre-Flight Options](#), they are already determined and displayed as per the title of the report.

See [Pre-Flight Options](#) and [Sample Report](#) for more information on this report.

Pre-Flight Options

Shown below are the Pre-Flight options for the [ID, Title, Author, Status](#) report and other reports.

See also [Sample Report](#) to see what this report looks like.



Click on each area for more information

Library Report Setup

<p>Filter - Asset Type</p> <input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine	<p>Filter - Category</p> <input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching	<p>Filter - Status</p> <input type="checkbox"/> On Shelf <input type="checkbox"/> On Loan <input type="checkbox"/> On Hold <input type="checkbox"/> In Repair <input type="checkbox"/> Lost <input type="checkbox"/> Archived
<p>Sort Order</p> <input checked="" type="radio"/> Title <input type="radio"/> Asset ID <input type="radio"/> ISBN <input type="radio"/> Asset Type <input type="radio"/> Status <input type="radio"/> Author <input type="radio"/> Added Date	<p>Copies</p> <input checked="" type="radio"/> Primary & Copy <input type="radio"/> Primary <input type="radio"/> Copy	<p><input type="checkbox"/> Filter on Added Date</p> <p>22/01/2013 <input type="text"/></p> <p style="text-align: center;">To</p> <p>22/01/2013 <input type="text"/></p>

Filters

Filter - Asset Type	Filter - Category	Filter - Status
<input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine	<input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching	<input type="checkbox"/> On Shelf <input type="checkbox"/> On Loan <input type="checkbox"/> On Hold <input type="checkbox"/> In Repair <input type="checkbox"/> Lost <input type="checkbox"/> Archived

Filters in this pre-flight are all inclusive filters. That is, if you do not tick any filters, then all information from all areas is included. If you tick say 3 Categories, then those 3 Categories are included and all other Categories are excluded. This is true for each filter shown above.

Sort Order

Sort Order

Title

Asset ID

ISBN

Asset Type

Status

Author

Added Date

Choose the order to sort the report by.

Date Filter

Filter on Added Date

01/01/2013

To

31/01/2013

Select to filter on the Date Field of Date Added. (Date the asset was added to the Library Manager)
 In the example above, we are filtering for assets added in January 2013

Copies

Copies

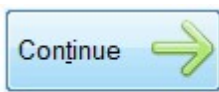
Primary & Copy

Primary

Copy

Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.

Continue



Press the Continue Button to run the selected report.

Sample Report

Sample ID, Title, Author, Status Report shown below...

Library Assets - Main Church			
ID:	Status:	Title	Author
6	On Loan	A Simpe Christian	John Macarthur
11	On Shelf	Gods High Calling For Women	John Macarthur
8	On Shelf	NKJV Macarthur Study Bible	John Macarthur
9	On Shelf	Right thinking in a World Gone Wrong	John Macarthur
1	On Loan	The Jesus you Cant Ignore	John Macarthur
5	Archived	The Tale of two Sons	John Macarthur
12	On Shelf	The Truth War	John Macarthur
2	On Shelf	The Truth War	John Macarthur
10	On Shelf	Truth for Today	John Macarthur
4	On Shelf	Twelve Extraordinary Women	John Macarthur
3	On Shelf	Twelve Ordinary Men	John Macarthur

ID, Title, Asset Type, Added Date

This report does not include a Field Selection option in the [Pre-Flight Options](#), they are already determined and displayed as per the title of the report.

See [Pre-Flight Options](#) for more information on this report. A Sample for this report is shown below.

Library Assets - Main Church

ID:	Status:	Title	Asset Type	Added Date
6	On Loan	A Simpe Christian	Book	03/11/2009
11	On Shelf	Gods High Calling For Women	Book	03/11/2009
8	On Shelf	NKJV Macarthur Study Bible	Book	03/11/2009
9	On Shelf	Right thinking in a World Gone Wrong	Book	03/11/2009
1	On Loan	The Jesus you Cant Ignore	Book	03/11/2009
5	Archived	The Tale of two Sons	Book	03/11/2009
12	On Shelf	The Truth War	Book	20/01/2013
2	On Shelf	The Truth War	Book	03/11/2009
10	On Shelf	Truth for Today	Book	03/11/2009
4	On Shelf	Twelve Extraordinary Women	Book	03/11/2009
3	On Shelf	Twelve Ordinary Men	Book	03/11/2009
7	On Shelf	Why we Beleive the Bible?	Book	03/11/2009

ID, Title, Category

This report does not include a Field Selection option in the [Pre-Flight Options](#), they are already determined and displayed as per the title of the report.

See [Pre-Flight Options](#) for more information on this report. A Sample for this report is shown below.

Library Assets - Main Church			
ID:	Status:	Title	Category
6	On Loan	A Simpe Christian	Teaching
11	On Shelf	Gods High Calling For Women	
8	On Shelf	NKJV Macarthur Study Bible	Bible
9	On Shelf	Right thinking in a World Gone Wrong	Teaching
1	On Loan	The Jesus you Cant Ignore	Teaching
5	Archived	The Tale of two Sons	Teaching
12	On Shelf	The Truth War	Theology, Teaching
2	On Shelf	The Truth War	Teaching
10	On Shelf	Truth for Today	Teaching
4	On Shelf	Twelve Extraordinary Women	Teaching
3	On Shelf	Twelve Ordinary Men	Teaching
7	On Shelf	Why we Beleive the Bible?	Teaching

ID, Title, Added Date, Copy Type, Loan Period

This report does not include a Field Selection option in the [Pre-Flight Options](#), they are already determined and displayed as per the title of the report.

See [Pre-Flight Options](#) for more information on this report. A Sample for this report is shown below.

Library Assets - Main Church

ID:	Title	Added	Copy	Loan (Days)
6	A Simpe Christian	03/11/2009	Primary	14
11	Gods High Calling For Women	03/11/2009	Primary	14
8	NKJV Macarthur Study Bible	03/11/2009	Primary	14
9	Right thinking in a World Gone Wrong	03/11/2009	Primary	14
1	The Jesus you Cant Ignore	03/11/2009	Primary	14
5	The Tale of two Sons	03/11/2009	Primary	14
12	The Truth War	20/01/2013	Copy	14
2	The Truth War	03/11/2009	Primary	14
10	Truth for Today	03/11/2009	Primary	14
4	Twelve Extraordinary Women	03/11/2009	Primary	14
3	Twelve Ordinary Men	03/11/2009	Primary	14

ID, Status, Title, Author, Asset Type, Copy Type, Loan Period

This report does not include a Field Selection option in the [Pre-Flight Options](#), they are already determined and displayed as per the title of the report.

See [Pre-Flight Options](#) for more information on this report. A Sample for this report is shown below.

Library Assets - Main Church						
ID:	Status	Title	Author	Asset Type	Copy	Loan (Days)
6	On Loan	A Simpe Christian	John Macarthur	Book	Primary	14
11	On Shelf	Gods High Calling For Women	John Macarthur	Book	Primary	14
8	On Shelf	NKJV Macarthur Study Bible	John Macarthur	Book	Primary	14
9	On Shelf	Right thinking in a World Gone Wrong	John Macarthur	Book	Primary	14
1	On Loan	The Jesus you Cant Ignore	John Macarthur	Book	Primary	14
5	Archived	The Tale of two Sons	John Macarthur	Book	Primary	14
12	On Shelf	The Truth War	John Macarthur	Book	Copy	14
2	On Shelf	The Truth War	John Macarthur	Book	Primary	14
10	On Shelf	Truth for Today	John Macarthur	Book	Primary	14
4	On Shelf	Twelve Extraordinary Women	John Macarthur	Book	Primary	14
3	On Shelf	Twelve Ordinary Men	John Macarthur	Book	Primary	14

Id, Status, Title, Comment

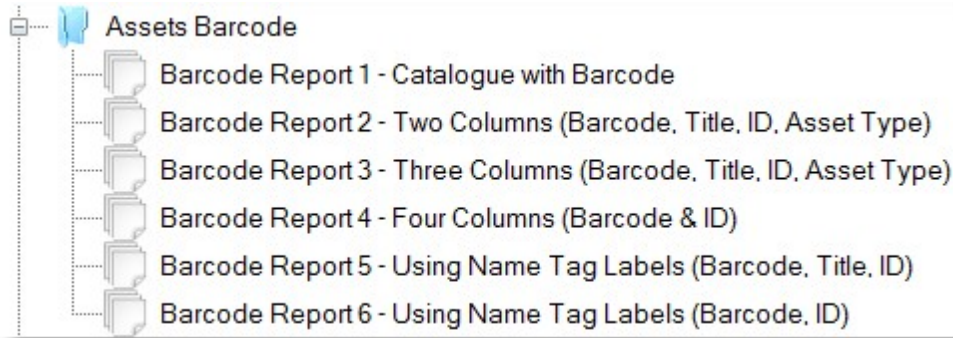
This report does not include a Field Selection option in the [Pre-Flight Options](#), they are already determined and displayed as per the title of the report.

See [Pre-Flight Options](#) for more information on this report. A Sample for this report is shown below.

Library Assets - Main Church			
ID:	Status	Title	Comment
6	On Loan	A Simpe Christian	
11	On Shelf	Gods High Calling For Women	
8	On Shelf	NKJV Macarthur Study Bible	
9	On Shelf	Right thinking in a World Gone Wrong	
1	On Loan	The Jesus you Cant Ignore	
5	Archived	The Tale of two Sons	
12	On Shelf	The Truth War	
2	On Shelf	The Truth War	
10	On Shelf	Truth for Today	
4	On Shelf	Twelve Extraordinary Women	

Assets Barcode

Shown below are the Assets Bar Code Reports. Click on each report for more information and a sample report.



Barcode Report 1 - Catalogue with Barcode

This report is designed to assist you by keeping a printed record of all assets (or selected asset groups) in your Library, including a Bar Code for use with a Bar Code Scanner.

See [Pre-Flight Options](#) and [Sample Report](#) for more details.


Pre-Flight Options



Shown below are the Pre-Flight options for the Barcode Report 1 Report. See also [Sample Report](#) to see what this report looks like.



Click on each area for more information


Library Report Setup

Filter on Assets tagged for 'BarCode Print' Reset Tag 

<p>Filter - Asset Type</p> <ul style="list-style-type: none"> <input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine 	<p>Filter - Category</p> <ul style="list-style-type: none"> <input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching 	<p>Filter - Status</p> <ul style="list-style-type: none"> <input type="checkbox"/> On Shelf <input type="checkbox"/> On Loan <input type="checkbox"/> On Hold <input type="checkbox"/> In Repair <input type="checkbox"/> Lost <input type="checkbox"/> Archived
<p>Filed to Include</p> <ul style="list-style-type: none"> <input type="checkbox"/> ISBN <input type="checkbox"/> Author <input type="checkbox"/> Asset Type <input type="checkbox"/> Category <input type="checkbox"/> Added Date <input type="checkbox"/> Comment <input type="checkbox"/> Status <input type="checkbox"/> Loan Period <input type="checkbox"/> Copy Type 	<p>Sort Order</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Title <input type="radio"/> Asset ID <input type="radio"/> ISBN <input type="radio"/> Asset Type <input type="radio"/> Status <input type="radio"/> Author <input type="radio"/> Added Date 	<p>Copies</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Primary & Copy <input type="radio"/> Primary <input type="radio"/> Copy <p><input type="checkbox"/> Filter on Added Date</p> <p style="text-align: center;">22/01/2013  To 22/01/2013 </p>

Filter On Barcode Assets

Filter on Assets tagged for 'BarCode Print'

Reset Tag 

Tick this option to only include assets that have been ticked to include in Bar Code Reports. Pressing the Reset Tag option allows you to untag all assets with that option tagged.

Filters

Filter - Asset Type	Filter - Category	Filter - Status
<input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine	<input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching	<input type="checkbox"/> On Shelf <input type="checkbox"/> On Loan <input type="checkbox"/> On Hold <input type="checkbox"/> In Repair <input type="checkbox"/> Lost <input type="checkbox"/> Archived

Filters in this pre-flight are all inclusive filters. That is, if you do not tick any filters, then all information from all areas is included. If you tick say 3 Categories, then those 3 Categories are included and all other Categories are excluded. This is true for each filter shown above.

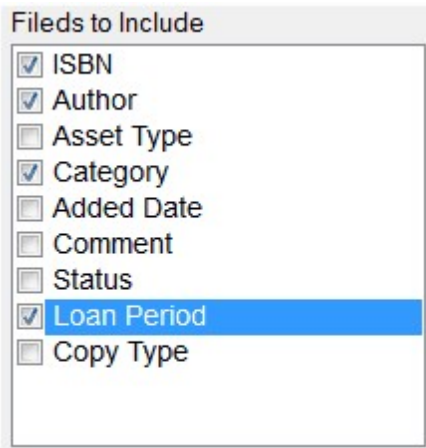
Sort Order

Sort Order

- Title
- Asset ID
- ISBN
- Asset Type
- Status
- Author
- Added Date

Choose the order to sort the report by.

Fields To Include

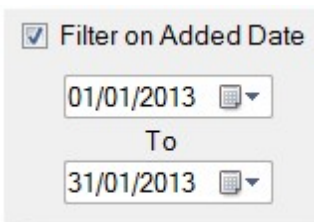


Fields to Include

- ISBN
- Author
- Asset Type
- Category
- Added Date
- Comment
- Status
- Loan Period
- Copy Type

In addition to the title field, tick the addition fields that you want on the report.

Date Filter



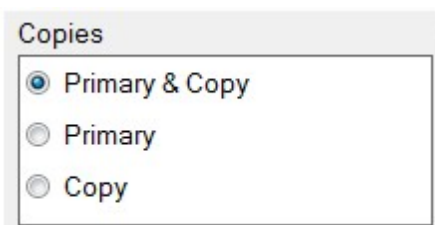
Filter on Added Date

01/01/2013 To 31/01/2013

Select to filter on the Date Field of Date Added. (Date the asset was added to the Library Manager)

In the example above, we are filtering for assets added in January 2013

Copies

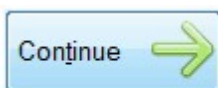


Copies

- Primary & Copy
- Primary
- Copy

Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.

Continue






Press the Continue Button to run the selected report.

Sample Report

Sample Catalogue Report with Bar Code shown below...

Barcode Report 1 - Main Church

	<p>ID: 6</p> <p>Author: John Macarthur</p> <p>Category: Teaching</p> <p>Status: On Loan</p>	<p>A Simpe Christian</p> <p>Added Date: 03/11/2009</p> <p style="text-align: right;">Asset Type: Book</p>
	<p>ID: 11</p> <p>Author: John Macarthur</p> <p>Status: On Shelf</p>	<p>Gods High Calling For Women</p> <p>Added Date: 03/11/2009</p> <p style="text-align: right;">Asset Type: Book</p>
	<p>ID: 8</p> <p>Author: John Macarthur</p> <p>Category: Bible</p> <p>Status: On Shelf</p>	<p>NKJV Macarthur Study Bible</p> <p>Added Date: 03/11/2009</p> <p style="text-align: right;">Asset Type: Book</p>

Barcode Report 2 - 2 Col, Barcode, Title, Id, Asset Type

This report does not include a Field Selection option in the [Pre-Flight Options](#), they are already determined and displayed as per the title of the report.

See [Pre-Flight Options](#) and [Sample Report](#) for more information on this report.

Pre-Flight Options


Shown below are the Pre-Flight options for the Catalogue Report. See also [Sample Report](#) to see what this report looks like.

This Pre-Flight option window also applies to a number of other Library reports as well. Sample reports for all of these other reports are not shown from this topic.








Click on each area for more information

Library Report Setup

Filter on Assets tagged for 'BarCode Print' Reset Tag 

<p>Filter - Asset Type</p> <ul style="list-style-type: none"> <input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine 	<p>Filter - Category</p> <ul style="list-style-type: none"> <input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching 	<p>Filter - Status</p> <ul style="list-style-type: none"> <input type="checkbox"/> On Shelf <input type="checkbox"/> On Loan <input type="checkbox"/> On Hold <input type="checkbox"/> In Repair <input type="checkbox"/> Lost <input type="checkbox"/> Archived
--	--	---

<p>Copies</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Primary & Copy <input type="radio"/> Primary <input type="radio"/> Copy 	<p><input type="checkbox"/> Filter on Added Date</p> <p>22/01/2013  To 22/01/2013 </p>
---	--

Help 
Cancel 
Continue 

Filter On Barcode Assets

Filter on Assets tagged for 'BarCode Print' Reset Tag 

Tick this option to only include assets that have been ticked to include in Bar Code Reports. Pressing the Reset Tag option allows you to untag all assets with that option tagged.


Filters

Filter - Asset Type	Filter - Category	Filter - Status
<input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine	<input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching	<input type="checkbox"/> On Shelf <input type="checkbox"/> On Loan <input type="checkbox"/> On Hold <input type="checkbox"/> In Repair <input type="checkbox"/> Lost <input type="checkbox"/> Archived


Filters in this pre-flight are all inclusive filters. That is, if you do not tick any filters, then all information from all areas is included. If you tick say 3 Categories, then those 3 Categories are included and all other Categories are excluded. This is true for each filter shown above.

Date Filter

Filter on Added Date

01/01/2013 

To

31/01/2013 

Select to filter on the Date Field of Date Added. (Date the asset was added to the Library Manager)
 In the example above, we are filtering for assets added in January 2013

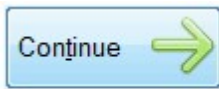
Copies

Copies

- Primary & Copy
- Primary
- Copy

Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.

Continue



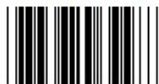




Press the Continue Button to run the selected report.

Sample Report

Sample 2 Column Bar Code Report shown below...









Barcode Report 2 - Main Church

 A Simpe Christian	ID: 6 Asset Type: Book	 Twelve Ordinary Men	ID: 3 Asset Type: Book
 God has a sense of Humour	ID: 15 Asset Type: Book	 Why we Beleive the Bible?	ID: 7 Asset Type: Book
	ID: 13 Asset Type: Book		

Barcode Report 3 - 3 Col, Barcode, Title, Id, Asset Type

This report does not include a Field Selection option in the [Pre-Flight Options](#), they are already determined and displayed as per the title of the report.

Barcode Report 3 - Main Church

 ID: 6 Asset Type: Book A Simpe Christian	 ID: 20 Asset Type: Book The Book Of Acts	 ID: 16 Asset Type: Book The Book Of Mathew
 ID: 15 Asset Type: Book God has a sense of Humour	 ID: 30 Asset Type: Book The Book Of Exodus	 ID: 34 Asset Type: Book The Book Of Numbers
 ID: 13 Asset Type: Book Gods Grand Plan for your life	 ID: 31 Asset Type: Book The Book Of Exodus Volume 2	 ID: 36 Asset Type: Book The Book Of Psalms Volume 1
		

Barcode Report 4 - 4 Col, Barcode, Id

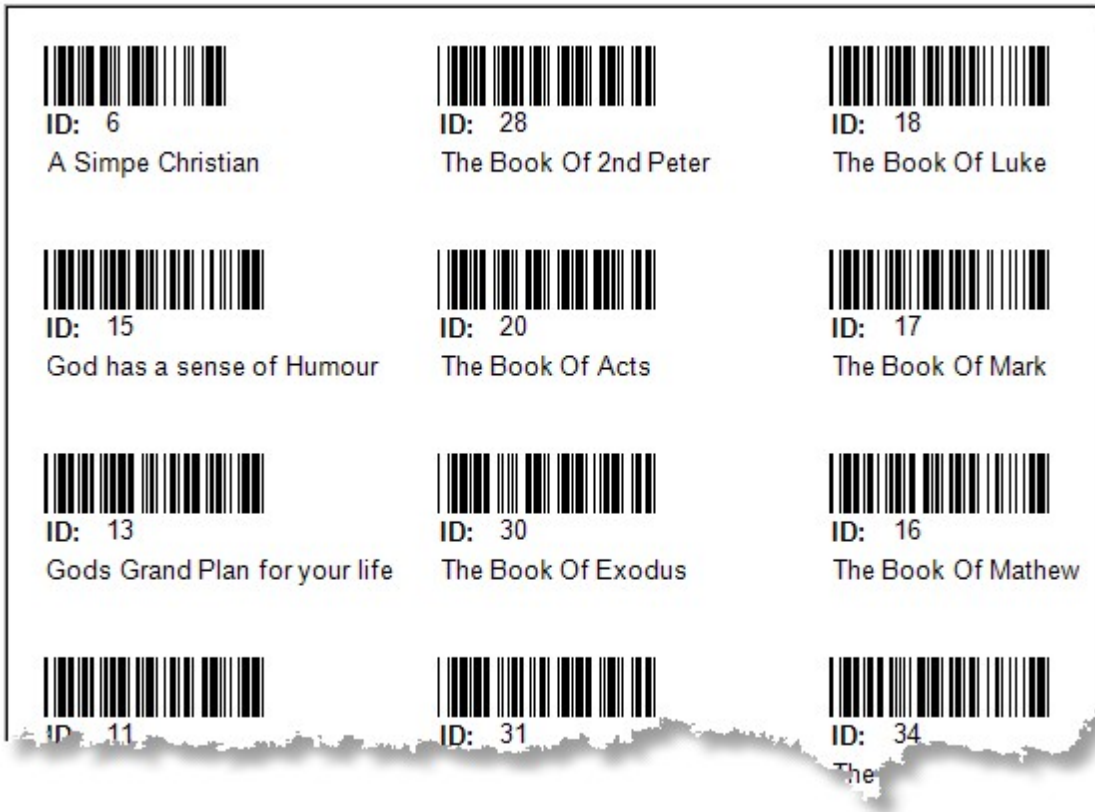
This report does not include a Field Selection option in the [Pre-Flight Options](#), they are already determined and displayed as per the title of the report.



Barcode Report 5 - Name Tag Labels - Barcode, Title, Id

This report does not include a Field Selection option in the [Pre-Flight Options](#), they are already determined and displayed as per the title of the report.

The exact size and placement of labels on this report is controlled entirely by the Name Tag Setup area. You can create multiple name tag profiles for your own label sizes. See [Name Tag settings](#) for more information on this.



Barcode Report 6 - Name Tag Labels - Barcode, Id

This report does not include a Field Selection option in the [Pre-Flight Options](#), they are already determined and displayed as per the title of the report.

The exact size and placement of labels on this report is controlled entirely by the Name Tag Setup area. You can create multiple name tag profiles for your own label sizes. See [Name Tag settings](#) for more information on this.



Assets On Loan

This report is ideal for showing a list of all assets that are out on loan, and when they are due back.

See [Pre-Flight Options](#) and [Sample Report](#) for more details.

Pre-Flight Options

Shown below are the Pre-Flight options for the Assets On Loan Report. See also [Sample Report](#) to see what this report looks like.



Click on each area for more information

Library Report Setup

Report on all assets on loan
 Report on overdue assets only Due back by

<p>Filter - Asset Type</p> <ul style="list-style-type: none"> <input type="checkbox"/> Book <input type="checkbox"/> DVD <li style="background-color: #e0e0e0;"><input checked="" type="checkbox"/> Magazine 	<p>Filter - Category</p> <ul style="list-style-type: none"> <input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching 	<p>Sort Order</p> <ul style="list-style-type: none"> <li style="background-color: #e0e0e0;"><input checked="" type="radio"/> Title <input type="radio"/> Asset ID <input type="radio"/> Borrowed Date <input type="radio"/> Due Back Date <input type="radio"/> Borrowed By
<p>Copies</p> <ul style="list-style-type: none"> <li style="background-color: #e0e0e0;"><input checked="" type="radio"/> Primary & Copy <input type="radio"/> Primary <input type="radio"/> Copy 		

Filter on Borrowed Date To
 Filter on Due Back Date To

Report On

Report on all assets on loan
 Report on overdue assets only Due back by

Choose to report all assets that are on loan, or on assets that are overdue by a selected date.

Filters

Filter - Asset Type	Filter - Category
<input type="checkbox"/> Book <input type="checkbox"/> DVD <input checked="" type="checkbox"/> Magazine	<input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching

Filters in this pre-flight are all inclusive filters. That is, if you do not tick any filters, then all information from all areas is included. If you tick say 3 Categories, then those 3 Categories are included and all other Categories are excluded. This is true for each filter shown above.

Sort Order

Sort Order

Title
 Asset ID
 Borrowed Date
 Due Back Date
 Borrowed By

Choose the order to sort the report by.

Date Filter (Borrowed Date)

Filter on Borrowed Date To

Select to filter on the Date Field of Date Borrowed. (Date the asset was Borrowed from the Library)
 In the example above, we are filtering for assets Borrowed on the 23rd of January 2013

Date Filter (Due Back Date)

Filter on Due Back Date 23/01/2013 To 23/01/2013

Select to filter on the Date Field of Due Back. (Date the asset is due back in the Library)
 In the example above, we are filtering for assets due back on the 23rd of Jan 2013.

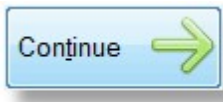
Copies

Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.

Copies

- Primary & Copy
- Primary
- Copy

Continue



Press the Continue Button to run the selected report.

Sample Report

Library Assets on Loan - Main Church					
ID:	Title	Borrowed	Due	Borrowed By	Asset Type
6	A Simpe Christian	14/11/2009	28/11/2009	Stevo Allwright	Book
1	The Jesus you Cant Ignore	18/01/2013	01/02/2013	Stevo Allwright	Book

Assets Reserved For People

This report is ideal for showing a list of all assets that are currently on reserve, assisting you in managing the availability of these assets.

See [Pre-Flight Options](#) and [Sample Report](#) for more details.

Pre-Flight Options

Shown below are the Pre-Flight options for the Assets Reserved For People Report. See also [Sample Report](#) to see what this report looks like.



Click on each area for more information

Library Report Setup

Report on all reserved assets
 Report on reserved assets returned
 Report on reserved assets returned and waiting to contact people for pickup

<p>Filter - Asset Type</p> <div style="border: 1px solid gray; padding: 5px;"> <input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine </div>	<p>Filter - Category</p> <div style="border: 1px solid gray; padding: 5px;"> <input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching </div>	<p>Sort Order</p> <div style="border: 1px solid gray; padding: 5px;"> <input checked="" type="radio"/> Title <input type="radio"/> Asset ID <input type="radio"/> Status <input type="radio"/> Reserved Date <input type="radio"/> Reserved For </div> <p>Copies</p> <div style="border: 1px solid gray; padding: 5px;"> <input checked="" type="radio"/> Primary & Copy <input type="radio"/> Primary <input type="radio"/> Copy </div>
---	---	--

Filter on Reserved Date 23/01/2013 To 23/01/2013

Report On

Report on all reserved assets

Report on all assets that are reserved, regardless of the state or contact state of the asset.

Report on reserved assets returned

Report on all assets that are on reserve, and have been returned. IE: They have an On Shelf status.

Report on reserved assets returned and waiting to contact people for pickup

Report on all assets that are on reserve and you have not yet contacted them to let them know that assets are back on the shelf.

Filters

Filter - Asset Type	Filter - Category
<input type="checkbox"/> Book	<input type="checkbox"/> Family Life
<input type="checkbox"/> DVD	<input type="checkbox"/> Commentary
<input checked="" type="checkbox"/> Magazine	<input type="checkbox"/> Counselling
	<input type="checkbox"/> Bible
	<input type="checkbox"/> Fiction
	<input type="checkbox"/> Theology
	<input type="checkbox"/> Children
	<input type="checkbox"/> Worship Music
	<input type="checkbox"/> Teaching

Filters in this pre-flight are all inclusive filters. That is, if you do not tick any filters, then all information from all areas is included. If you tick say 3 Categories, then those 3 Categories are included and all other Categories are excluded. This is true for each filter shown ab

Sort Order

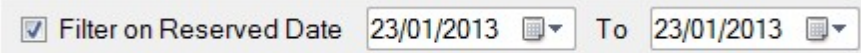


Sort Order

- Title
- Asset ID
- Borrowed Date
- Due Back Date
- Borrowed By

Choose the order to sort the report by.

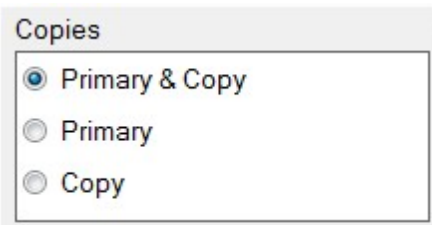
Date Filter (Reserved Date)



Filter on Reserved Date 23/01/2013 To 23/01/2013

Select to filter on the Date Field of Asset Reserved Date. (Date the asset was reserved.)
In the example above we are filtering for assets reserved on the 23rd of Jan 2013.

Copies

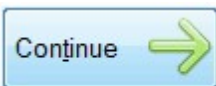


Copies

- Primary & Copy
- Primary
- Copy

Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.

Continue



Press the Continue Button to run the selected report.

Sample Report

Library Assets Reserved - Main Church								
ID:	Status	(X) = If a copy of the asset is 'On Shelf', 'Y'=Yes 'N'=No (X) Title	Reserved	Reserved For	SMS	Email	Phone	
9	On Shelf	N Right thinking in a World Gone Wrong	19/01/2013 08:40 PM	Stevo Allwright	20/01/2013	No	20/01/2013	
1	On Loan	N The Jesus you Cant Ignore	20/01/2013 10:54 AM	Big Ray Barton	No	No	No	

Assets Loan History

This report is useful in seeing the history of assets being loaned out from the Library. This can assist in trying to get an idea of your most popular assets being borrowed.

See [Pre-Flight Options](#) and [Sample Report](#) for more details.

Pre-Flight Options

Shown below are the Pre-Flight options for the Assets Loan History Report. See also [Sample Report](#) to see what this report looks like.

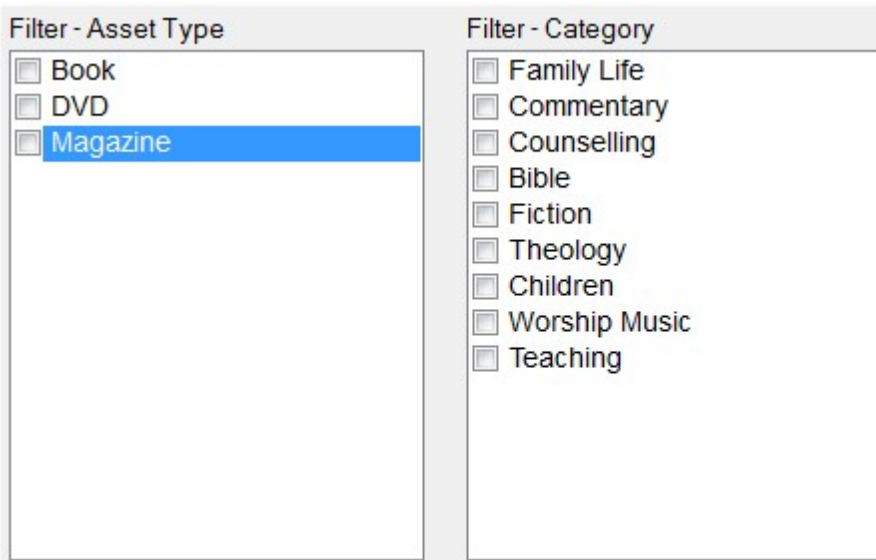


Click on each area for more information

Library Report Setup

<p>Filter - Asset Type</p> <ul style="list-style-type: none"><input type="checkbox"/> Book<input type="checkbox"/> DVD<input type="checkbox"/> Magazine	<p>Filter - Category</p> <ul style="list-style-type: none"><input type="checkbox"/> Family Life<input type="checkbox"/> Commentary<input type="checkbox"/> Counselling<input type="checkbox"/> Bible<input type="checkbox"/> Fiction<input type="checkbox"/> Theology<input type="checkbox"/> Children<input type="checkbox"/> Worship Music<input type="checkbox"/> Teaching	<p>Sort Order</p> <ul style="list-style-type: none"><input checked="" type="radio"/> Title<input type="radio"/> Asset ID<input type="radio"/> Borrowed Date<input type="radio"/> Return Date<input type="radio"/> Borrowed By
<p>Copies</p> <ul style="list-style-type: none"><input checked="" type="radio"/> Primary & Copy<input type="radio"/> Primary<input type="radio"/> Copy		
<p><input checked="" type="checkbox"/> Filter on Borrowed Date 25/01/2013 To 25/01/2013</p> <p><input checked="" type="checkbox"/> Filter on Returned Date 25/01/2013 To 25/01/2013</p>		
<p>Help ? Cancel ↩ Continue →</p>		

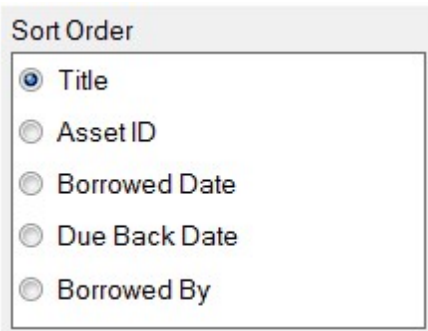
Filters



The screenshot shows a dialog box with two columns of filters. The left column is titled "Filter - Asset Type" and contains three items: "Book", "DVD", and "Magazine". The "Magazine" item is selected, indicated by a blue highlight. The right column is titled "Filter - Category" and contains eight items: "Family Life", "Commentary", "Counselling", "Bible", "Fiction", "Theology", "Children", "Worship Music", and "Teaching". All items in both columns have an unchecked checkbox to their left.

Filters in this pre-flight are all inclusive filters. That is, if you do not tick any filters, then all information from all areas is included. If you tick say 3 Categories, then those 3 Categories are included and all other Categories are excluded. This is true for each filter shown above.

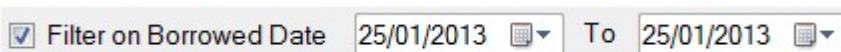
Sort Order



The screenshot shows a dialog box titled "Sort Order" with five radio button options. The "Title" option is selected, indicated by a filled radio button. The other options are "Asset ID", "Borrowed Date", "Due Back Date", and "Borrowed By", all of which have empty radio buttons.

Choose the order to sort the report by.

Date Filter (Borrowed Date)



The screenshot shows a dialog box with a checked checkbox labeled "Filter on Borrowed Date". To the right of the checkbox are two date input fields. The first field contains "25/01/2013" and the second field contains "25/01/2013". Between the two date fields is the text "To". Each date field has a small calendar icon to its right.

Select to filter on the Date Field of Borrowed Date. (Date the asset was borrowed.)
In the example above, we are filtering for assets reserved on the 25th of Jan 2013.

Date Filter (Returned Date)

Filter on Returned Date 25/01/2013 To 25/01/2013

Select to filter on the Date Field of Returned Date. (Date the asset was returned.)
 In the example above, we are filtering for assets returned on the 25th of Jan 2013.

Copies

Copies

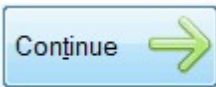
Primary & Copy

Primary

Copy

Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.

Continue



Press the Continue Button to run the selected report.

Sample Report

Library Assets History - Main Church					
ID:	Title	Borrowed	Returned	Period(days)	Borrowed By
11	Gods High Calling For Women	01/09/2009	28/11/2009	89	Stevo Allwright
1	The Jesus you Cant Ignore	18/01/2013			Stevo Allwright
5	The Tale of two Sons	20/01/2013	20/01/2013	1	Katey Anglin

Primary Assets with Multiple Copies

This report shows asset that have copies in recorded in the Library. This report show the Asset Id numbers for all copies of a report.

See Pre-Flight Options and [Sample Report](#) for more information.

Sample Report

Library Asset Copies - Main Church		
Primary ID:	Title	Copy ID's
12	The Truth War	2, 42,
42	The Truth War	2, 12,
2	The Truth War	12, 42,

People Reports

The People Reports as the name suggests, focus on aspects of the People using the Library. These reports include Library Cards, Bar Code reports and Loans, Overdue and Reserved reports.

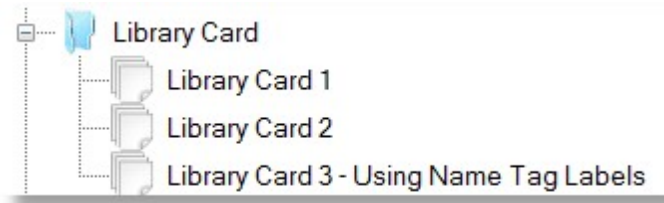
Click on each group and report below for more information.



Library Card

There are 3 Library Card Designs. Click on each Library Card report below for more information.

If you want to be really creative with your Library Card Design, you can create a Custom Report for your Library Card, as the individual Bar Code object in Custom Report is the same bar code used in the Library Manager.



Library Card 1

The Library Card 1 report is shown below. This is designed for cutting and laminating.



Library Card 2

The Library Card 2 report is shown below. This is designed for cutting and laminating.

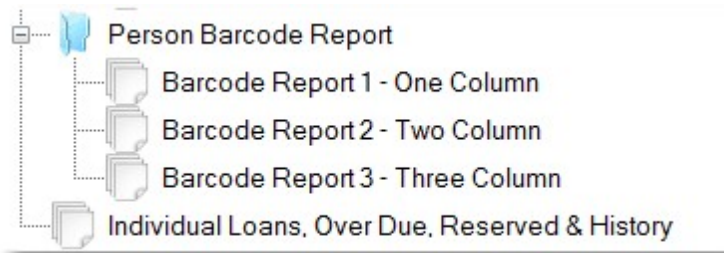


Library Card 3 - Using Name Tag Labels

The Library Card 3 report is shown below. This is designed for sizing to be matched directly with a selected Name Tag setup. This allows you to setup and use a specific size to suit pre-punched name tag stock, or sticky labels. We have not shown a sample below as the design / layout will vary depending on the size of your labels.




Person Barcode Report

The Person Bar Code Report is designed to print out sheets of bar codes that can be used for scanning a person's name from if you do not want to use a Library Card system.



Barcode Report 1 - 1 Col

This is a single column one person per line report with a name and bar code. This is suitable for having available at a scan point for you to just scan a person's name from a piece of paper, instead of a library card.

Library Barcode Report 1		
	Allwright	maz
	Allwright	Stevo
	Angel	Belinda






Barcode Report 2 - 2 Col

This is a two column two people per line report with a name and bar code. This is suitable for having available at a scan point for you to just scan a person's name from a piece of paper, instead of a library card.

Library Barcode Report 2			
	Allwright maz		Barton Mum
	Allwright Stevo		Barton Karren
	Angel Belinda		Barton Big Ray
	Angel Helen		Blackeby Dot

Barcode Report 3 - 3 Col

This is a three column three people per line report with a name and bar code. This is suitable for having available at a scan point for you to just scan a person's name from a piece of paper, instead of a library card.

Library Barcode Report 3		
 Allwright maz	 Anglin Mathew	 Blackeby Frank
 Allwright Stevo	 Baker Gary	 Blackeby Heather
		 Bl

Individual Loans, Overdue, Reserved and History

This report gives a comprehensive history of all activity for individuals who have used the library. See [Pre Flight](#) options and [Sample Report](#) for more information.

Pre Flight

Shown below are the Pre-Flight options for the [Individual Loans, Overdue, Reserved and History](#) report

Report Components

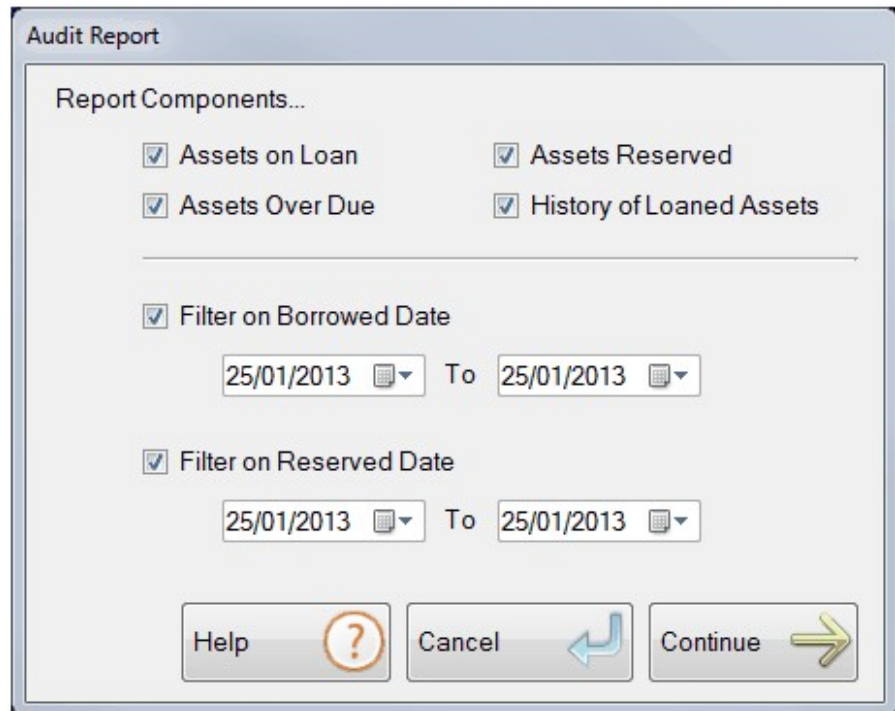
Select any of the 4 report components to include on the report.

Filter on Borrowed Date

Filter the report on a range of dates that assets have been borrowed in.

Filter on Reserved Date

Filter the report on a range of dates that assets have been reserved in.



The screenshot shows a dialog box titled "Audit Report" with a "Report Components..." section. It contains four checked checkboxes: "Assets on Loan", "Assets Reserved", "Assets Over Due", and "History of Loaned Assets". Below these are two filter sections, both checked: "Filter on Borrowed Date" and "Filter on Reserved Date". Each filter section has two date input fields, both set to "25/01/2013". At the bottom of the dialog are three buttons: "Help" (with a question mark icon), "Cancel" (with a left arrow icon), and "Continue" (with a right arrow icon).

Sample Report

Shown below is a Individual summary report with all report components ticked to be included. We have shown one person here for clarity.

Library Individual Report

Allwright Stevo

Assets on Loan

Asset Id	ISBN	Borrowed	Due Back	Title
6		14/11/2009	28/11/2009	A Simpe Christian
1		18/01/2013	01/02/2013	The Jesus you Cant Ignore

Assets Over Due

Asset Id	ISBN	Borrowed	Due Back	Title
6		14/11/2009	28/11/2009	A Simpe Christian

Assets Reserved

Asset Id	ISBN	Status	SMS	Email	Phone	Title
9		On Shelf	20/01/2013	No	20/01/2013	Right thinking in a World Gone Wrong

Loan History

Asset Id	ISBN	Borrowed	Returned	Period	Title
1		18/01/2013			The Jesus you Cant Ignore
11		01/09/2009	28/11/2009	89	Gods High Calling For Women

Statistics Reports

There are 2 Statistics Reports. Click on each report below for more information.



Asset Statistics

The Asset Statistics report shows the number of times an asset has been borrowed.

See [Pre-Flight Options](#) and [Sample Report](#) for more information on this report.

Pre-Flight Options

Shown below are the Pre-Flight options for the Assets Loan History Report. See also [Sample Report](#) to see what this report looks like.

This Pre-Flight option window also applies to a number of other Library reports as well. Sample reports for all of these other reports are not shown from this topic.



Click on each area for more information

Library Report Setup

Only Show Primary Assets combining the totals of any copies with the primary asset

<p>Filter - Asset Type</p> <ul style="list-style-type: none"> <input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine 	<p>Filter - Category</p> <ul style="list-style-type: none"> <input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching 	<p>Filter - Status</p> <ul style="list-style-type: none"> <input type="checkbox"/> On Shelf <input type="checkbox"/> On Loan <input type="checkbox"/> On Hold <input type="checkbox"/> In Repair <input type="checkbox"/> Lost <input type="checkbox"/> Archived
--	--	---

Sort Order

Title
 Asset ID

Filter on Added Date
 25/01/2013 To 25/01/2013

Filters

Filter - Asset Type	Filter - Category	Filter - Status
<input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine	<input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> Fiction <input type="checkbox"/> Theology <input type="checkbox"/> Children <input type="checkbox"/> Worship Music <input type="checkbox"/> Teaching	<input type="checkbox"/> On Shelf <input type="checkbox"/> On Loan <input type="checkbox"/> On Hold <input type="checkbox"/> In Repair <input type="checkbox"/> Lost <input type="checkbox"/> Archived

Filters in this pre-flight are all inclusive filters. That is, if you do not tick any filters, then all information from all areas is included. If you tick say 3 Categories, then those 3 Categories are included and all other Categories are excluded. This is true for each filter shown above.

Primary Assets Only

Only Show Primary Assets combining the totals of any copies with the primary asset

Tick this option (Recommended) to combine all of the statistics for copies and a Primary Asset to just a single primary asset.

Sort Order

Choose the order to sort the report by.

Title
 Asset ID

Date Filter (Added Date)

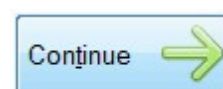
Select to filter on the Date Field of Added Date. (Date the asset was added to the Library.)

In the example above, we are filtering for assets added on the 25th of Jan 2013.

Filter on Added Date
 25/01/2013 To 25/01/2013

Continue

Press the Continue Button to run the selected report.



Sample Report

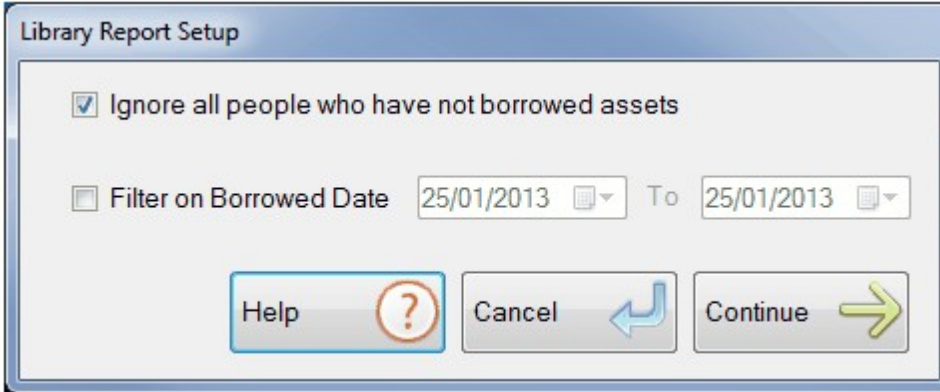
Library Asset Statistics (Borrowed Amount) - Main Church

Borrowed	ID	Title
1	6	A Simpe Christian
0	15	God has a sense of Humour
0	13	Gods Grand Plan for your life
1	11	Gods High Calling For Women
0	8	NKJV Macarthur Study Bible
0	14	Delos Jesus Encourite

Individual Borrowing Statistics

The Individual Borrowing Statistics Report is a simple report that shows the number of assets borrowed by each person.

Pre Flight Options



Library Report Setup

Ignore all people who have not borrowed assets

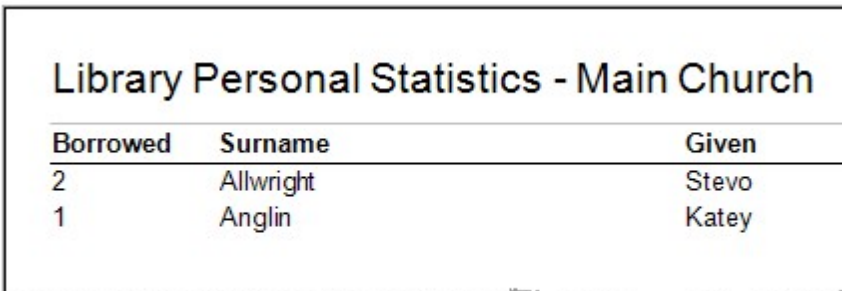
Filter on Borrowed Date 25/01/2013 To 25/01/2013

Help Cancel Continue

Tick **Ignore All People**.... for only concentrating the report on people who have used the Library (Recommended)

Use the **Filter On Borrowed Date** to restrict the report to a range of dates that assets were borrowed.

Sample Report



Borrowed	Surname	Given
2	Allwright	Stevo
1	Anglin	Katey

Pastoral Care 12

Pastoral tools for todays church.

Chapter 9

Explore Tab



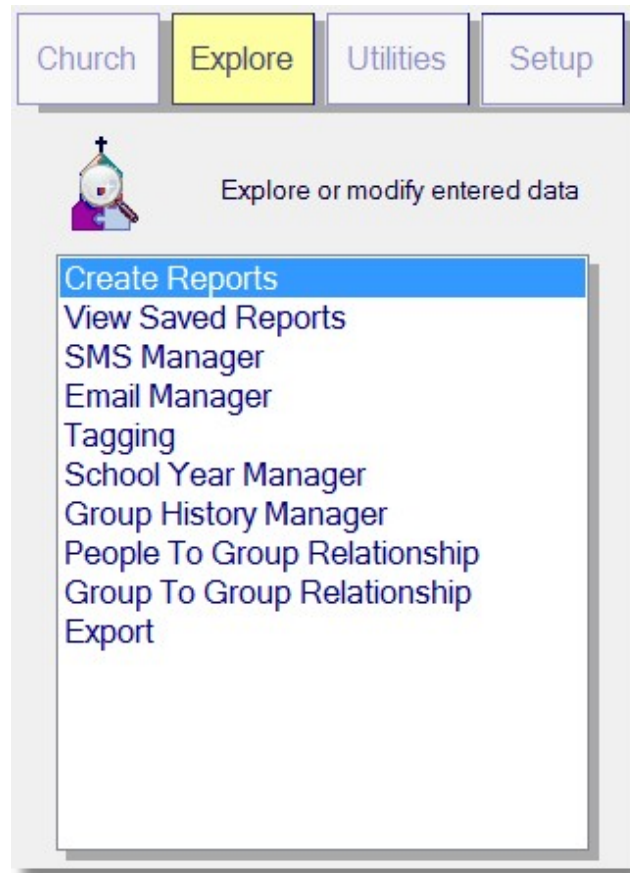
(c) 1988-2013 PASTORAL CARE MINISTRIES

Explore Introduction

Welcome to the Explore Tab. The Explore Tab is all about Information! Reports on information, Using Information for communication and Manipulating information in Pastoral Care.



Click on each Explore menu item shown right to find out more about each area.



Create Reports

There are now 6 main reporting areas in the Create Reports feature of Pastoral Care. Create reports can be found from the Explore Tab of Pastoral Care. (See [Explore Introduction](#) for more information)

For those people who are familiar with earlier versions, you might think that this version has less to offer. In fact, it looks like there is less control, however we have not only removed some of the clutter from the Create Reports Toolbar, but we have also added heaps more power and flexibility to the whole Create Reports area.

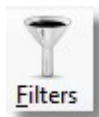
Important Information

It is important to understand that reporting concepts explained here, are used throughout Pastoral Care in different reporting areas. So learning all you can about this area will put you in good stead to learn other reporting functions throughout the program.

Common Features

Every single Pastoral Care report, including the reports you make yourself using [Custom Directory Designer](#), [Custom Report Designer](#) and [Custom Letter Writer](#) can all be manipulated and controlled with a range of common controls or features.

Filters



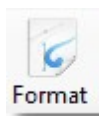
[Filters](#) in Pastoral Care are an extremely powerful tool in manipulating information and sorting it into useful chunks. Use Filters to output reports to selected groups of people, people in groups, ministries status's etc, and people not in groups etc.

Sort



[Sort](#) in Pastoral Care allows you to sort reports by various fields and also locate information based on a range of date sensitive settings.

Format



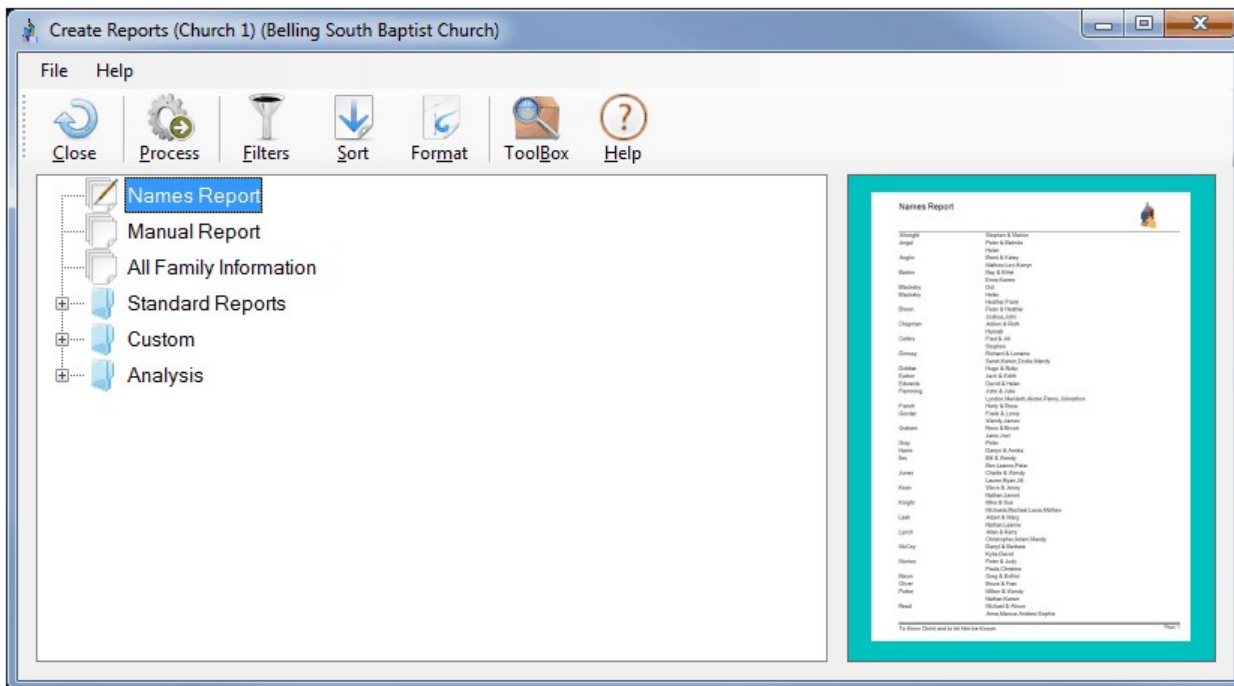
[Format](#) in Pastoral Care allows you to force formatting on all built in Pastoral Care reports, and all custom reports.

Create Reports Main Window

Shown below is the Create Reports main window. See also [Create Reports](#) for a general introduction to reports in Pastoral Care.



Click on each area for more information.



Report Previews

The area on the right hand side of the reports window shows a report preview. In most report selections, we should have loaded a preview for you to see. You can also assign your own previews to a report by using the [Preview](#) button on [The Report Viewer](#) toolbar.

Create Reports Toolbar

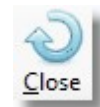


Click on each icon below to learn more about the Create Reports toolbar.



Close

Exit the Create Reports Area



Process

Press this button to run the selected report.



Filters

About Filters

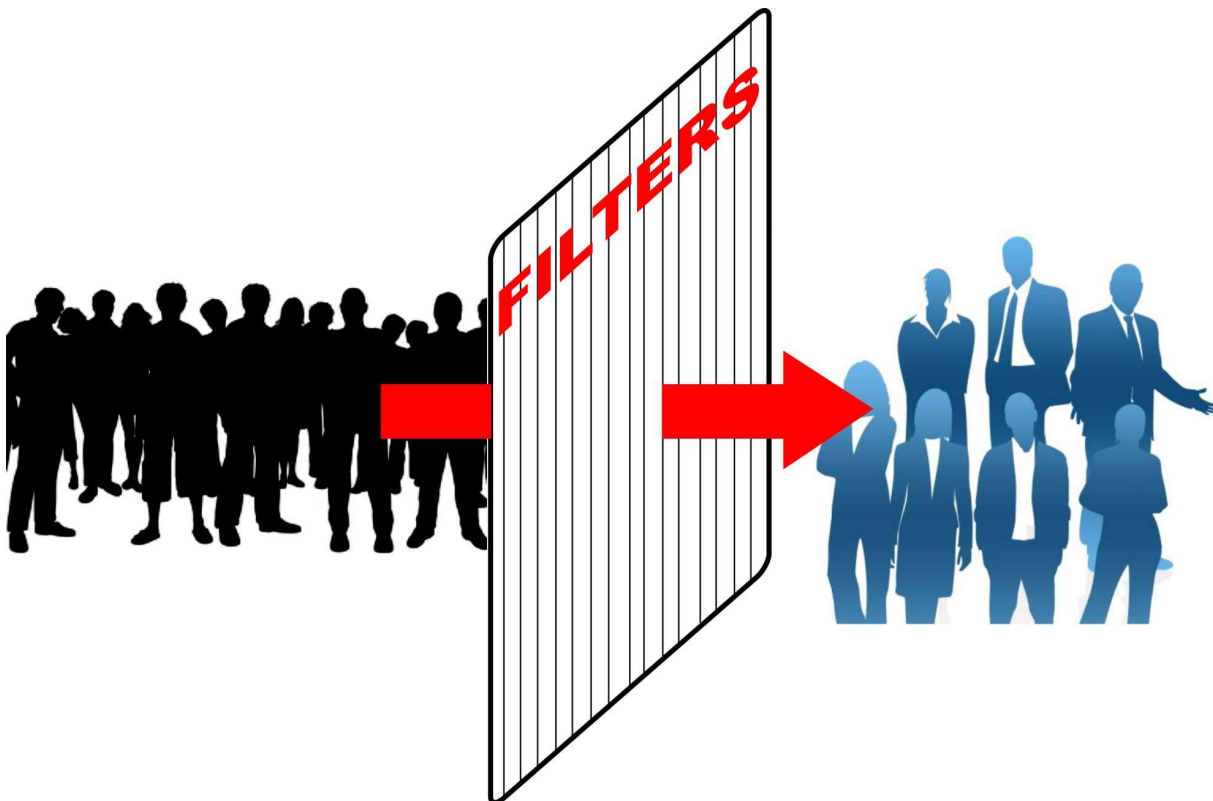


In Pastoral Care, there are many places that have this common Filters function. A Filter can be described as a Search Process. Use a Filter to search for people to achieve different tasks in Pastoral Care. Printing Reports of selected groups, doing a Roll for a home group or sending a letter to all the ladies in your church.

All these tasks and more can be achieved with the use of Filters. See [The Filters Window](#) for full details on this area.

Filter Concepts

The diagram below shows how filters work in concept. Start with all of your church represented on the left hand side of the diagram, and pass these people through your filters. What comes out the other side is just a selected group of people based on the filters used.



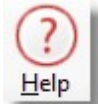
Toolbox

Access the standard Pastoral Care [Toolbox](#)



Help

Access the context sensitive help system.



The Filters Window

The standard Pastoral Care Filters window is shown below. See also [About Filters](#) for more information on how filters function.



Click on each part of the Filters Window to learn how filters function in Pastoral Care.

Filter On



Click on each of the Filter On options (right) to learn more about what level of filtering is available throughout Pastoral Care. See also [More, Data](#) and [Tagging](#) for additional filter options on [The Filters Window](#)

- Individual Condition
- Family Condition
- Status
- Individual Groups
- Ministry Active
- Ministry Potential
- Medical
- Relationships
- Individual Dates
- Flexi Fields
- Family Groups
- Family Dates
- SMS List
- Email List
- Occupation
- Suburb

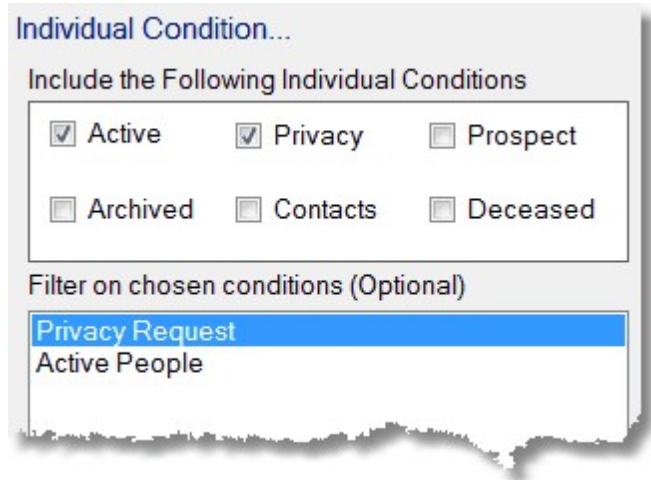
Individual Condition

Tick Filters

If you tick any of the Individual Conditions, a person will pass through the filters (ie, be included in your report / action) if they have any of the ticked Individual Conditions in their family file.

Optional Filters

After you have ticked an Individual Condition, the ticked items become available to be also added to the Report Logic filters. This is partially doubling up on a filter as just ticking an item will include a person with that condition, however if you want to exclude a group based on Individual Condition, you could select it in the Optional List (shown right) and press the AND- button which is "Must NOT be in ALL groups" filter



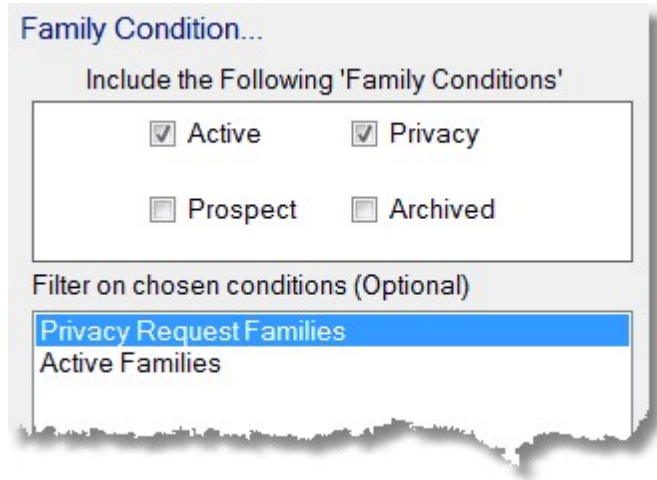
Family Condition

Tick Filters

If you tick any of the Family Conditions, a person will pass through the filters (ie, be included in your report / action) if they have any of the ticked Family Conditions in their family file.

Optional Filters

After you have ticked a Family Condition, the ticked items become available to be also added to the Report Logic filters. This is partially doubling up on a filter as just ticking an item will include a person with that family condition, however if you want to exclude a group based on a Family Condition, you could select it in the Optional List (shown right) and press the AND-button which is "Must NOT be in ALL groups" filter



Status

Status Filters

To add a filter for a person's (individual) status, follow these simple steps.

Step 1

Select the Status to filter on.



Step 2

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



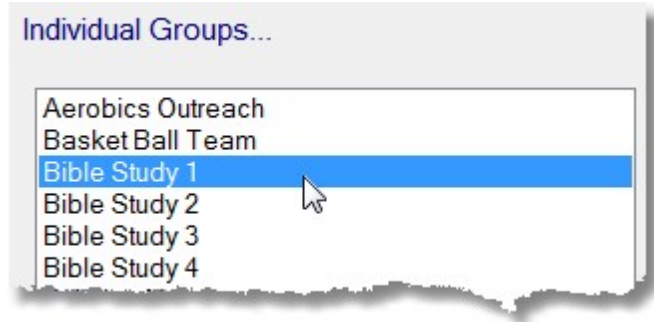
Individual Groups

Individual Group Filters

To add a filter for a person's (individual) group that they are participating in, follow these simple steps.

Step 1

Select the Individual Group to filter on. The example we have clicked on is Bible Study 1



Step 2

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



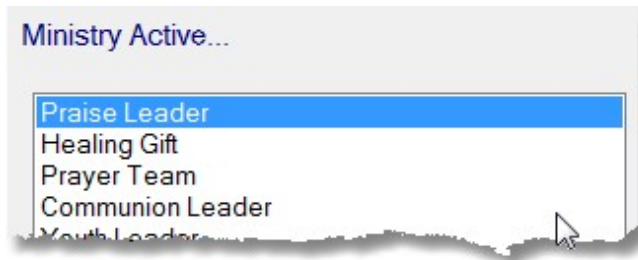
Ministry Active

Ministry - Active

To add a filter for a person's (individual) Active Ministry, follow these simple steps.

Step 1

Select the Ministry (active) to filter on. We have selected Praise Leader in our example here.



Step 2

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



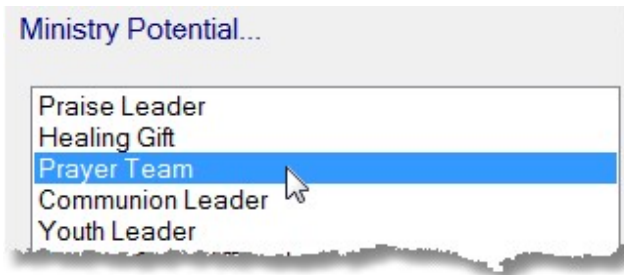
Ministry Potential

Ministry - Potential

To add a filter for a person's (individual) Potential Ministry, follow these simple steps.

Step 1

Select the Ministry (potential) to filter on. We have selected Prayer Team in our example here.



Step 2

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



Medical

Medical Filtering

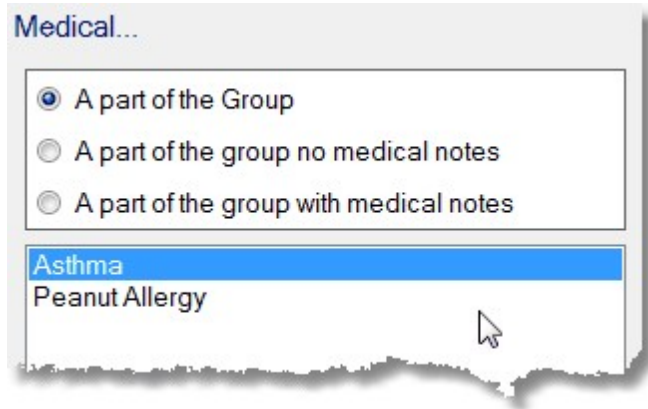
To add a filter for a person's (individual) Medical Condition, follow these simple steps.

Step 1

Select the Medical Condition to filter on. We have selected Asthma in our example here.

Step 2

Choose if you only want people who are A Part of the Group, a Part of the group with no medical notes, or Part of the Group With Medical Notes.



Step 3

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



Relationships

Relationship Filtering

To add a filter for a person's (individual) Relationship to other people, follow these simple steps.

Step 1

Select the Relationship (active) to filter on. We have selected Step Father to locate all people recorded as Step Fathers in our example here.



Step 2

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



Individual Dates

Individual Date Filtering

To add a filter for a person's (individual) Date, follow these simple steps.

Step 1

Select the Individual Date to filter on. We have selected Membership in our example here.

Step 2

Choose if you only want people who are :

A Part of the Group

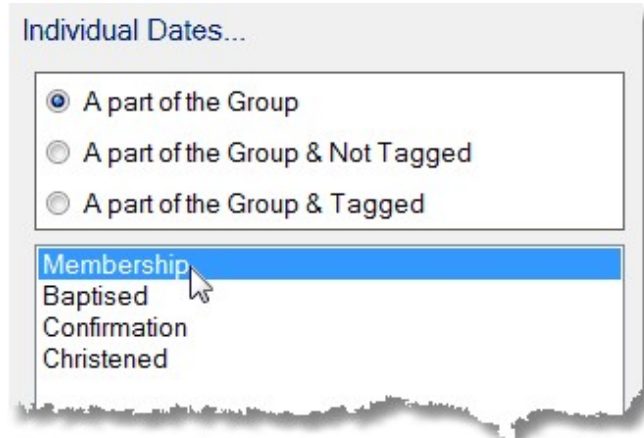
They have a date recorded or a Tag, or both

Part of Group & Not Tagged

Date recorded and no Tag

Part of Group & Tagged

Date recorded and Tagged



Step 3

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



Flexi Fields

Flexi Field Filtering

To add a filter for a person's (individual) Flexi field data, follow these simple steps.

Step 1

Select the Flexi Field to filter on. We have selected Elder in our example here.

Step 2

Choose if you only want people who are :

A Part of the Group

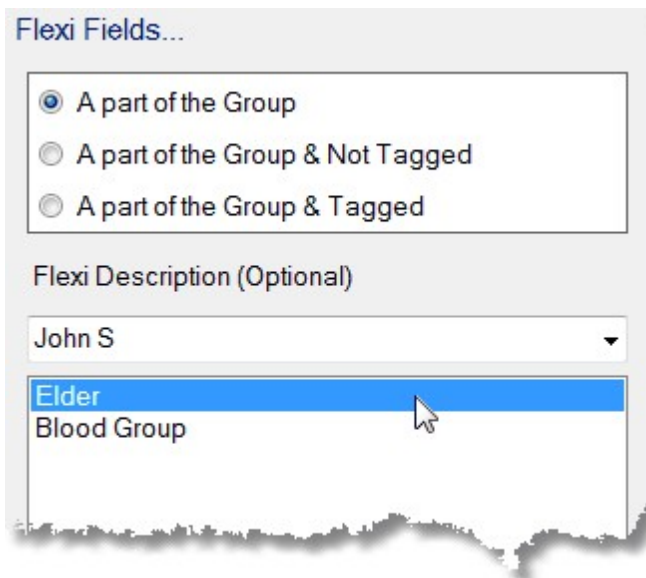
They have an Elder recorded

Part of Group & Not Tagged

Elder recorded and no Tag

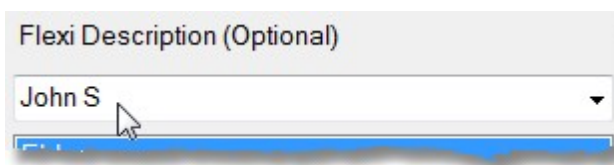
Part of Group & Tagged

Elder recorded and Tagged



Step 3

If you want to find everyone with the assigned elder of "John S" , enter this in the Flexi Description field, or select it from the drop down list if setup.



Step 4

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



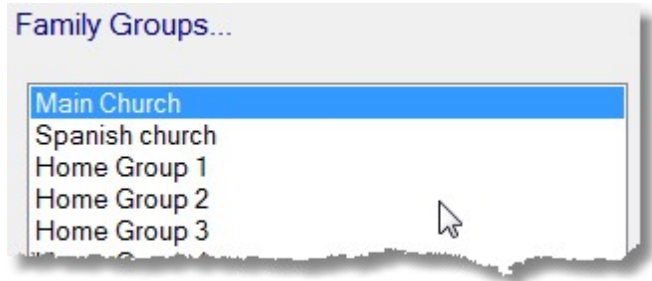
Family Groups

Family Group Filters

To add a filter for a Family Group, follow these simple steps.

Step 1

Select the Family Group to filter on. We have selected Main Church in our example here.



Step 2

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



Family Dates

Family Date Filtering

To add a filter for a Family Date, follow these simple steps.

Step 1

Select the Family Date to filter on. We have selected Contact Date in our example here.

Step 2

Choose if you only want people who are :

A Part of the Group

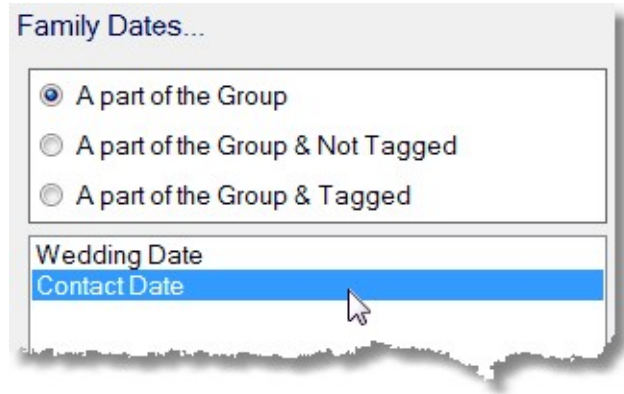
They have a date recorded or a Tag, or both

Part of Group & Not Tagged

Date recorded and no Tag

Part of Group & Tagged

Date recorded and Tagged



Step 3

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



SMS List

SMS List

To add a filter for a person's (individual) SMS List, follow these simple steps.

Step 1

Select the SMS List to filter on. We have selected Youth List in our example here.



Step 2

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



Email List

SMS List

To add a filter for a person's (individual) Email List, follow these simple steps.

Step 1

Select the Email List to filter on. We have selected Leadership List in our example here.



Step 2

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



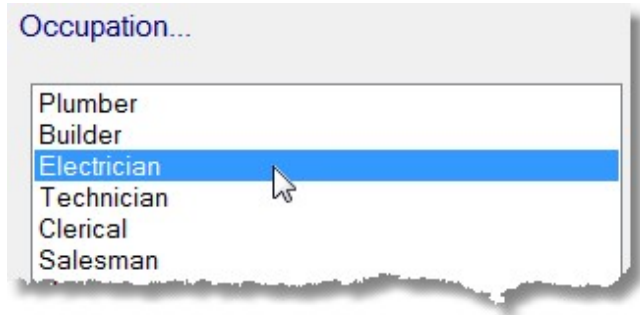
Occupation

Occupation

To add a filter for a person's (individual) Occupation, follow these simple steps.

Step 1

Select the Occupation to filter on. We have selected Electrician in our example here.



Step 2

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



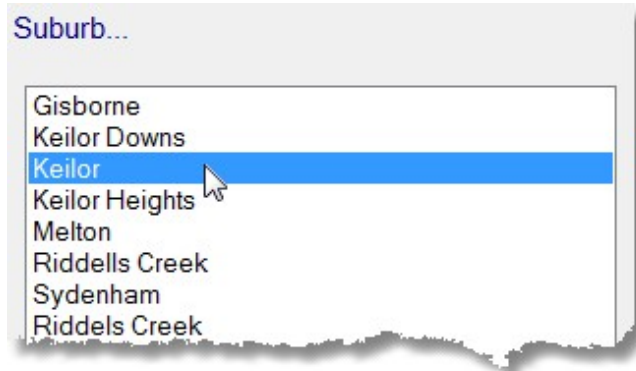
Suburb

Suburb Filter

To add a filter for a person's Suburb, follow these simple steps.

Step 1

Select the Suburb to filter on. We have selected Keilor in our example here.



Step 2

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.



Note, click on each button right for more information on each logic control



Filter Logic

Introduction to Filter Logic

Using Filters in Pastoral Care can be very simple or very complex. The power is in these 4 logic buttons. In earlier versions of Pastoral Care, these were called :

OR+, OR-, AND+, AND-

We have kept these names, but also added easier to understand button titles. These are shown to the right.

Click on each button to learn about each of the logic operations these buttons control.

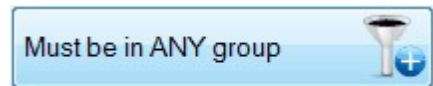


Filters can be added together for really powerful reporting. Shown below are a few examples of Combination Filters :

Description	Logic Operation	Filter Parameter
Find all Regular Attenders at church who are not in any home groups	OR+	Status - Regular Attender
	AND-	Individual Group - Home Group 1
	AND-	Individual Group - Home Group 2
	AND-	Individual Group - Home Group 3 etc
Find all Home Group Members with a known medical condition	OR+	Individual Group - Home Group 1
	OR+	Individual Group - Home Group 2
	OR+	Individual Group - Home Group 3 etc
	OR+	Medical - Medical Condition Name 1
	OR+	Medical - Medical Condition Name 2 etc

OR+

The OR+ Logic Operator means "Must be in ANY group" In practice, if you put in a filter of OR+ Members with OR+ Elders and OR+ Youth Leaders then the people passed through the filters will be:

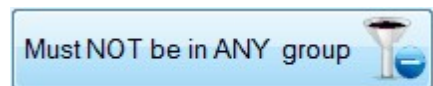


- A Member of the church
- OR an Elder
- OR a Youth Leader

A person need be only a member of one of the groups in the OR+ filter to pass through the filter for use.

OR-

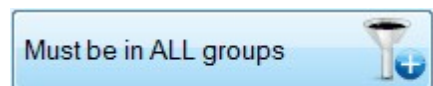
The OR- Logic Operator means "Must NOT be in ANY group" In practice, if you put in a filter of OR- Home Group 1, OR- Home Group 2, OR- Home Group 3 etc then the following people would be passed through the filters:



- All people in your church who not in any of the home groups in the filters

AND+

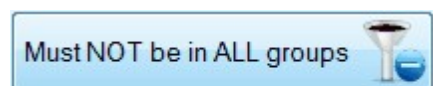
The AND+ Logic Operator means "Must be in ALL groups" In practice, if you put in a filter of AND+ Members with AND+ Baptised the people passed through the filters would be:



- All Members who HAVE been baptised
When using MULTIPLE AND+ filters, a person MUST be in every group represented in the AND+ filters to pass through for use.

AND-

The AND- Logic Operator means "Must NOT be in ALL groups" In practice, if you put in a filter of AND- Members with AND- Born Again then the following people would be passed through the filters:



- All people in your church who are not Members, and are also not Born Again

When using MULTIPLE AND- filters, a person MUST NOT be in any group represented in the AND- filters to pass through for use.

Filter ToolBar



Click on each of the icons on the Filters Toolbar below to learn more about each feature of the toolbar.



Close

Exit the Filters Window



Process

Process means to complete the task at hand. If you are in Reports and you are using Filters, the Process button will run the currently selected report if one is selected and close the filters window. If you are in another area, then the appropriate action will be performed. For Example in Tagging, if you go straight to filters, select a filter and press Process on the filters window, then the Tagging program will load all people according to the filters set, and return you to the Tagging window.



English

This icon is a smiley face for a reason. The English feature takes all currently selected filters, and describes the selected filters in simple to understand language. A sample English "translation" is shown below.



Filters in Plain English

This report is a 'Plain English' report explaining the configuration of the chosen 'Filters'. For a person to pass through the filters they 'MUST' meet the following criteria in each 'Step'.

Step 1 - A individual must have one of the following 'Family' conditions applied to their family file to pass through

Family Condition = 'Active'

Family Condition = 'Privacy'

Step 2 - A individual must have one of the following 'Individual' conditions applied to them to pass through

Individual Condition = 'Active'

Individual Condition = 'Privacy'

Step 3 - A person 'MUST BE' in at least one of the following groups

Status = Committed Attender

Step 4 - A person 'MUST NOT BE' in at least one of the following groups

Active Ministry = Praise Leader

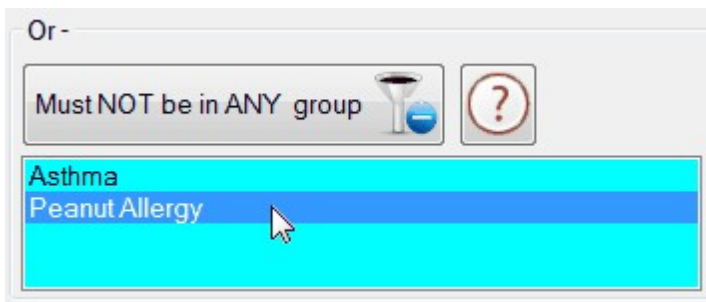
Active Ministry = Communion Leader

Active Ministry = Sunday School Teacher

Remove

Press the Remove icon to remove the currently highlighted filter. Double clicking on a selected filter will also remove it from it's logic area.

For Example, double clicking on the Peanut Allergy item shown below will remove it from the OR- Filter Group.



Reset

The Reset Button on the Filters Toolbar resets ALL settings on the Filters Window as well as subsequent settings from other Filter Areas loaded from the Filters window, such as [More](#), [Data](#) and [Tagging](#).



Save

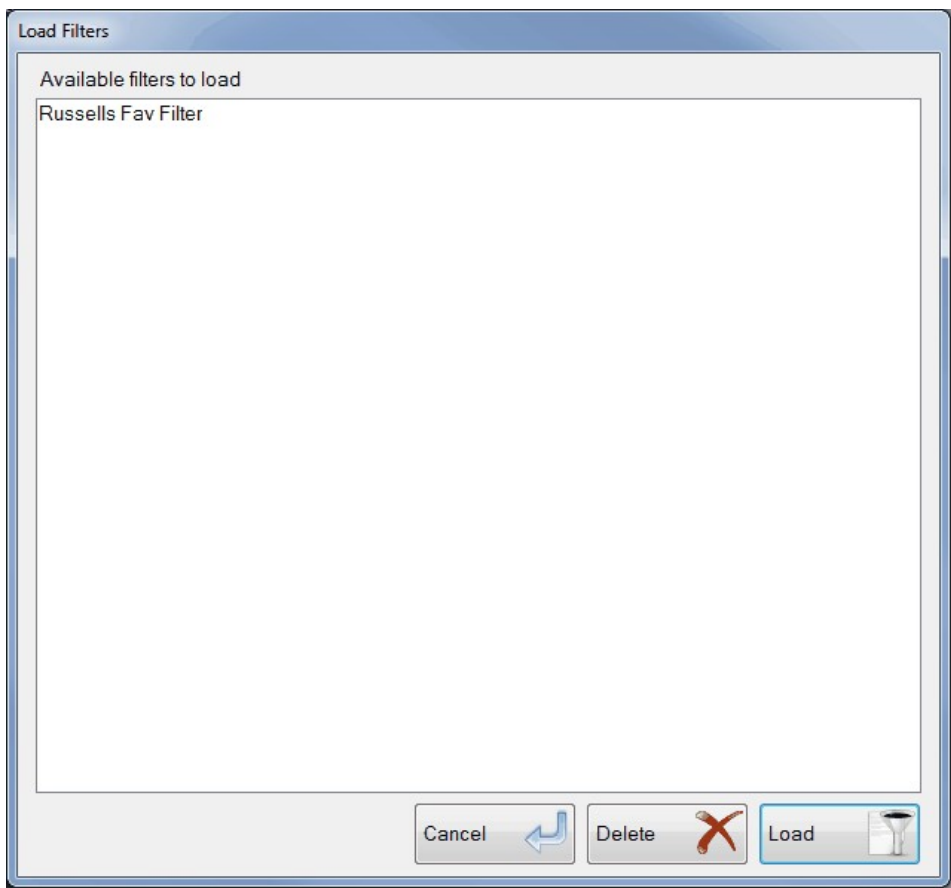
Save used to be known as Filter Fusion in earlier versions of Pastoral Care. This easier to use feature simple saves all Filters as a favorite for future use.



Saved filters can be used by all users of Pastoral Care. A Saved Filter cannot be edited, however you can load one, and save it under another name, then use the [Retrieve](#) window to delete the older filter.

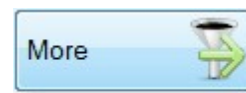
Retrieve

Use Retrieve to load a set of filters you have saved for re-use. The following window is displayed. Select the filter to use and press Load, or select a filter and press Delete to remove that selected saved filter.



More

The More button on [The Filters Window](#) takes you to an extended filters area for further filters. Filters selected here *work in conjunction* with any other filters selected and are also saved in the new Save / Retrieve filter settings feature. Note all options on the More Filters window are ticked only to make the picture clearer and showing all options enabled.



Click on each part of the More Filters window for full details of each filter available.

More Filters.....

<p>Gender</p> <p><input checked="" type="checkbox"/> Enable Gender Filter</p> <p><input checked="" type="radio"/> Unknown <input type="radio"/> Male <input type="radio"/> Female</p> <hr/> <p>Adult / Child</p> <p><input checked="" type="checkbox"/> Enable Adult / Adult Filter</p> <p><input checked="" type="radio"/> Adult <input type="radio"/> Child Adult Age <input type="text" value="18"/></p> <p>Age calculated based on today's date being: <input type="text" value="Sunday .21 October 2012"/></p> <hr/> <p>Family Position Load</p> <p><input checked="" type="checkbox"/> Enable Family Position Load</p> <p><input checked="" type="radio"/> Load all adults in family if a child passes through filters</p> <p><input type="radio"/> Load all children in family if an adult passes through filters</p> <hr/> <p>School Year Filter</p> <p><input checked="" type="checkbox"/> Enable School Year Filter</p> <p><input type="text" value="1"/> To <input type="text" value="12"/></p>	<p>Marital Status</p> <p><input checked="" type="checkbox"/> Enable Marital Status</p> <p><input type="text" value="Single Adult"/> Adult Age <input type="text" value="18"/></p> <p>Adult Age based on today's date being <input type="text" value="Sunday .21 October 2012"/></p> <hr/> <p>Mapping</p> <p><input checked="" type="checkbox"/> Enable Mapping</p> <p><input checked="" type="radio"/> Find people on a specific map</p> <p>Map <input type="text"/> Co. #1 <input type="text" value="A1"/> Co. #2 <input type="text" value="K12"/></p> <p><input checked="" type="radio"/> Find people within a set distance from a reference point</p> <p>Landmark <input type="text"/></p> <p>Map <input type="text"/> Ref <input type="text"/></p> <p>Km <input type="text" value="0"/> To <input type="text" value="100"/></p> <p><input type="checkbox"/> Add distance found to 'Surname'</p> <hr/> <p>Complex Filtering</p> <p><input checked="" type="radio"/> Standard Search (fastest)</p> <p><input type="radio"/> Complex Search (slowest)</p>
<p>Alphabetical Filter</p> <p><input type="text" value="A"/> To <input type="text" value="Z"/></p>	

Gender Filter

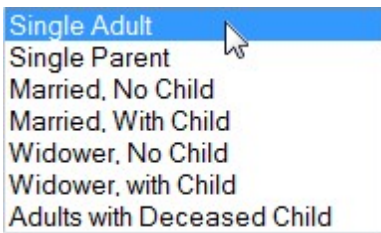
Pastoral Care can now filter for Gender. Male, Female, or Unknown. Unknown is simply that Gender Information has not yet been recorded in the Family File against a person's [Personal Details](#) area.

Marital Status

Choose from any of the 7 Marital Status options. The Adult Age option will calculate a child as an adult if you have birthdate information stored against them, and they are over the age set in this area. The default adult age is 18.

Available Marital Status's

The following Marital Status's are not set anywhere in Pastoral Care Settings. These are derived only from information on the family file structure.



Adult / Child

Filter on Adults or Children. The Adult Age option will calculate a child as an adult if you have birthdate information stored against them, and they are over the age set in this area. The default adult age is 18.

Mapping

Mapping allows you to search for people on specified maps, or find people a within a range of a predefined landmark.

Mapping setup can be found in the setup area called [Mapping](#).

If you tick the option **Add Distance found to Surname**, then next to each surname on the report, the distance from the landmark will be printed.

Mapping

Enable Mapping

Find people on a specific map

Map Co. #1 Co. #2

Find people within a set distance from a reference point

Landmark

Map Ref

Km To

Add distance found to 'Surname'

Family Position Load

This is a new filter option designed to assist in locating Children of Parents, or Parents of Children. For example to create a report of all Parents of children in Sunday School, run a filter for Sunday School Children, then enable this feature and select **Load All Adults...**

Family Position Load

Enable Family Position Load

Load all adults in family if a child passes through filters

Load all children in family if an adult passes through filters

This feature works both ways. You can also run a filter for all people in say a Home Group, then select to load the Children instead.

None of the original people selected by the filters are passed to the report etc, only the people selected by the options shown above are passed through the filters.

School Year Filtering

Use this option to filter for people with a School Year recorded against their person information area in the Family File.

See also [School Year Manager](#) for information on managing School Year information easily.

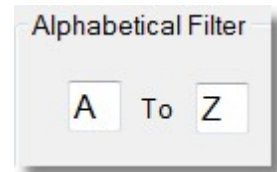
School Year Filter

Enable School Year Filter

To

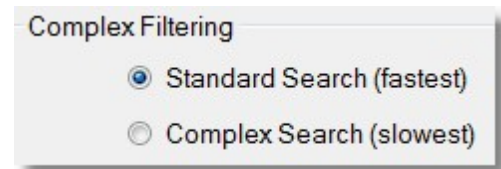
Alphabetical Filter

By Default, all Surnames are considered in a report, however if your report is too large, and you want to break it up, use this feature to create 2 or more smaller reports based on a range of surnames beginning with the letters typed in here.



Complex Filtering

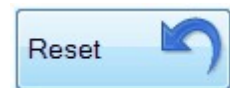
Our Software engineers have worked tirelessly to improve both the reliability and the performance of Pastoral Care reporting and filtering.



We have developed two different filtering / search methods to allow Pastoral Care to be more powerful in this version than in previous versions. In earlier versions of Pastoral Care, Complex Filters would not always return a result. In this version, Pastoral Care will in fact warn you if the filtering is too complex for the standard fast search, and it will prompt you to use the slower more complex search method.

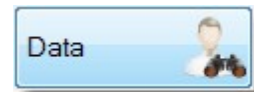
Reset

Press this to reset all filters on this window to their default settings.

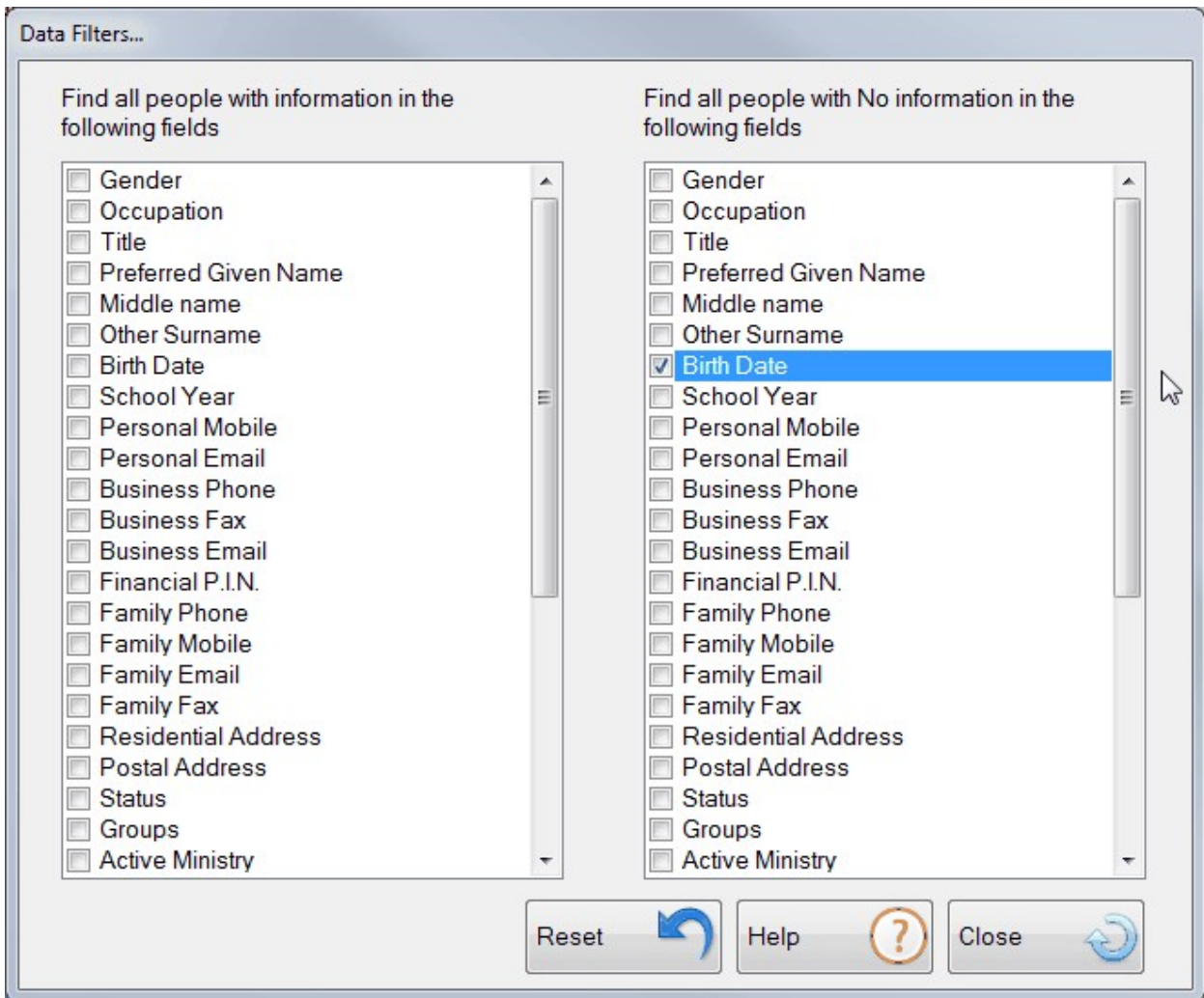


Data

The Data Filters option, available from the [The Filters Window](#) allows you to also search for people based on information that may or may not exist in the Pastoral Care database.

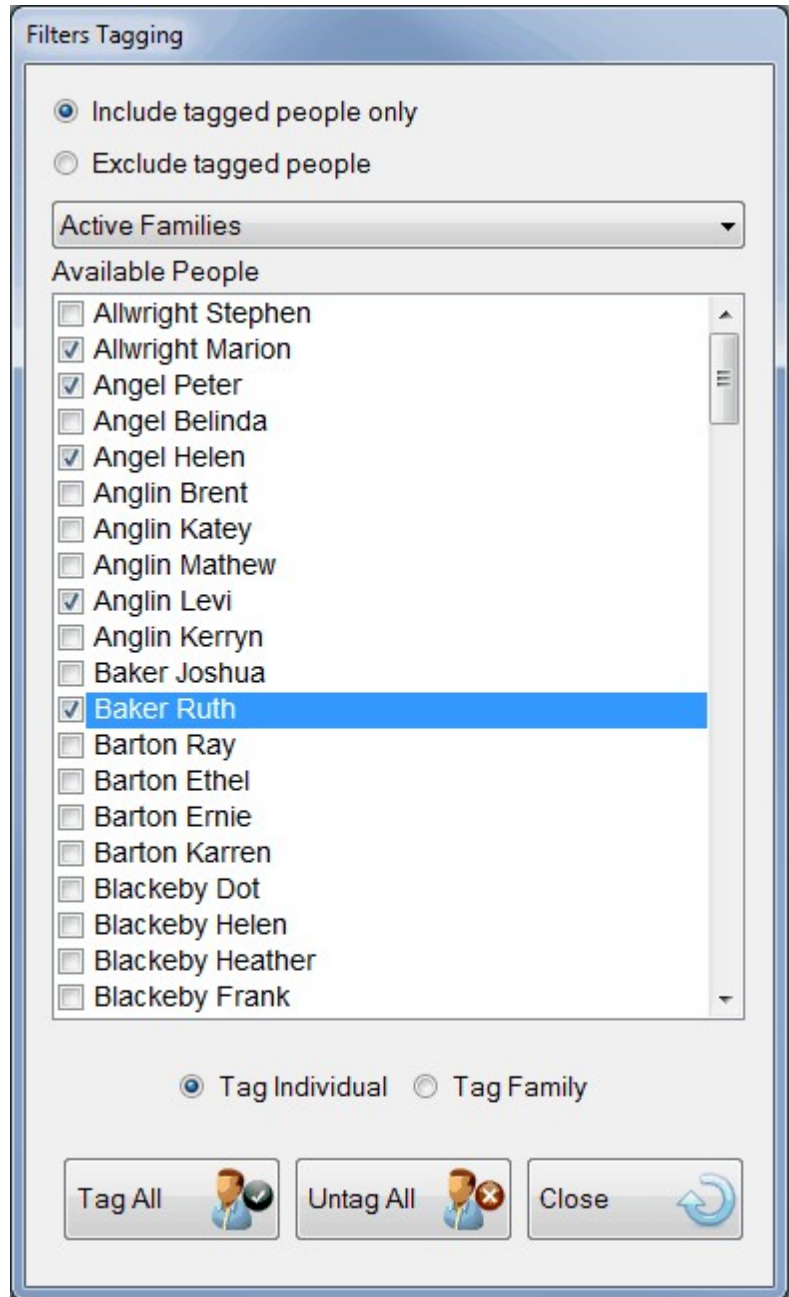


For example, to find all people without a birthdate, choose Data, and select from the "Find all people with no information..." list the Birthdate Field. This is shown in an example below.



Tagging

Use the tagging filter to simple find all people you have tagged (ticked) or to find all people that have not been ticked!



Sort




Sorting in Pastoral Care affects every report available in Pastoral Care, including all Custom Reports, Custom Directories and letters etc. Sorting is often described as simply changing the order of things in a list, and can be described that way here also, however sorting in Pastoral Care also allows for some grouping and date analysis as well.





The Sort window is shown below, and as you click on different areas to learn more, you will also discover that Sorting in Pastoral Care also has Filtering capabilities.


Click on each area below to learn more about sorting.


Sort



Close



Process


English


Reset


Save


Retrieve


Help

Family Format Individual Format

Family Format

Add Individual Surname to Given Name

Show Hidden Individual Surname

Individual Format

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

Enable Sort

Search Criteria

All Does Exist Does NOT Exist

Order Date by

By Surname By Month By Date

Date Search Criteria

All Dates

Month January

Age 1 To 18 Years

Date 22/10/2012

Anniversary Date To 22/10/2012

If Date does NOT exist

Suburb

Postcode

Birth Date

Visitation

Family Events

Family File Create Date

Family File Last Edited Date

Wedding Date

Contact Date

Membership

Baptised

Confirmation

Christened

Toolbar

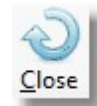


The Sort Window Toolbar is shown below. Click on each item to learn more.



Close

Close the Sort Window saving any settings for use.



Process

Process means to complete the task at hand. If you are in the Reports and you are using Sort, the Process button will run the currently selected report if one is selected and close the Sort window. If you are in another area, then the appropriate action will be performed.



English

This icon is a smiley face for a reason. The English feature takes all currently selected sort options, and describes them in simple to understand language. A sample English "translation" is shown below.



Sort in Plain English

This report is a 'Plain English' report explaining the configuration of 'Sort'

The program can be configured either to display reports in 'Family' format or 'Individual' format. Current configuration has the program in 'Family' mode

The Sort area has been enabled using 'Family File Create Date' in which.....
 The 'Family File Create Date' will be ordered by the the persons 'Surname'
 With a search criteria of looking at all dates in the month of January

Reset

The Reset Button on the Sort Toolbar resets ALL settings on the Sort Window.



Save

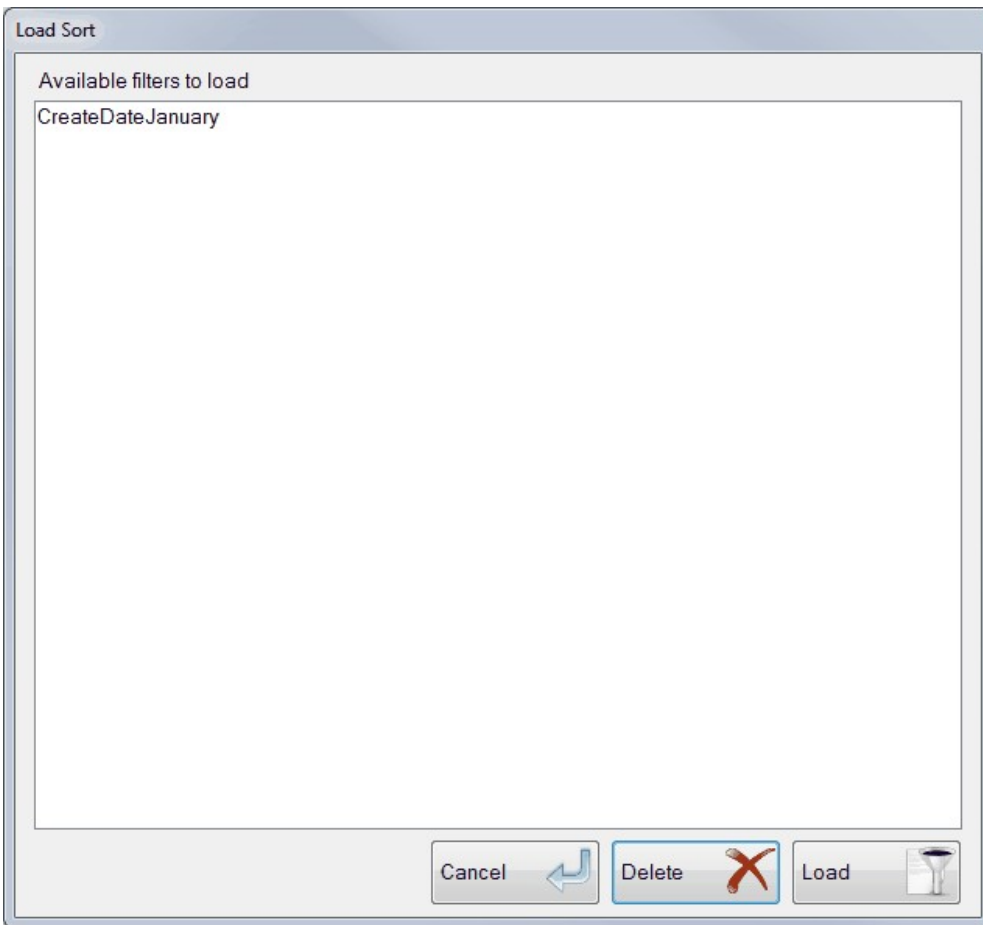
The Save button on the Sort Window simply saves all Sort Options as a favorite for future use.



Saved Sorts can be used by all users of Pastoral Care. A Saved Sort cannot be edited, however you can load one, and save it under another name, then use the [Retrieve](#) window to delete the older Sort settings.

Retrieve

Use Retrieve to load a set of Sort settings you have saved for re-use. The following window is displayed. Select the Sort to use and press Load, or select a Sort and press Delete to remove that selected saved Sort



Format

At the top of the Sort window is the Formatting Options. Formatting here is for Family Mode or Individual Mode. You can set Pastoral Care default formatting mode in the setup area. See [Default Report Format](#) in the settings area.

The best way to explain the difference between Family Format and Individual Format and how it plays out in reporting is to show you the difference.

Below is a part of a report shown in Family Mode, and following that report, is another one in Individual mode.

Family Mode Sample Report

Note the individual people in this report are grouped into family unit's.

Directory 1		
Allwright	Stephen & Marion 11 Blackdog Road Riddels Creek 3412 VIC	054-33-5478
Angel	Peter & Belinda Helen 12 Water Way Crt Gisborne 3444 VIC Map: 11 Ref: A6	054-22-1199 peter@spirit.com.au
Anglin	Brent & Katey Mathew, Levi, Kerryn 10 Marsh Road Keilor Heights 3191 VIC Map: 15 Ref: A4	03-273214 Brentl@spirit.com.au 041234567890
Baker	Joshua & Ruth 34 Heidelberg Rd Ivanhoe 3333	
Barton	Ray & Ethel	03-744-1222

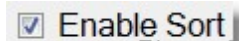
Individual Mode Sample Report

Below is the same report using Individual Format selected in the Sort window options. Note, the same report style is repeated for every individual as if they are a family! One person (ie Individual) per report object.

Directory 1		
Allwright	Marion 11 Blackdog Road Riddels Creek 3412 VIC	054-33-5478
Allwright	Stephen 11 Blackdog Road Riddels Creek 3412 VIC	054-33-5478
Angel	Belinda 12 Water Way Ct Gisborne 3444 VIC Map: 11 Ref: A6	054-22-1199 peter@spirit.com.au
Angel	Helen 12 Water Way Ct Gisborne 3444 VIC Map: 11 Ref: A6	054-22-1199 peter@spirit.com.au
Angel	Peter 12 Water Way Ct Gisborne 3444 VIC Map: 11 Ref: A6	054-22-1199 peter@spirit.com.au
Anglin	Brent 10 Marsh Road Keilor Heights 3191 VIC Map: 15 Ref: A1	03-273214 Brentl@spirit.com.au 04123456789

Enable Sort

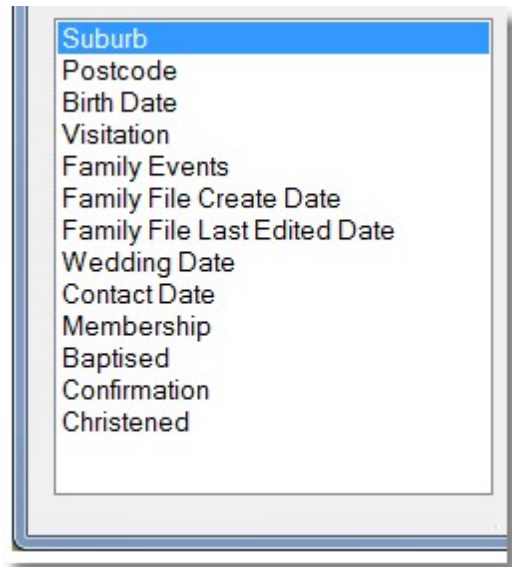
Tick the Enable Sort option to allow selection of many sort options. See the [Sort On](#) list for full details on what you can sort on with this feature.



When ticked, the [Sort On](#) list becomes active. See also [Date Sorts](#) for more information on date specific sorts and filters.

Sort On

Click on each of the Sort On items in the list below to learn more about sorting and filtering on the dates and location information available in Sort.



Suburb

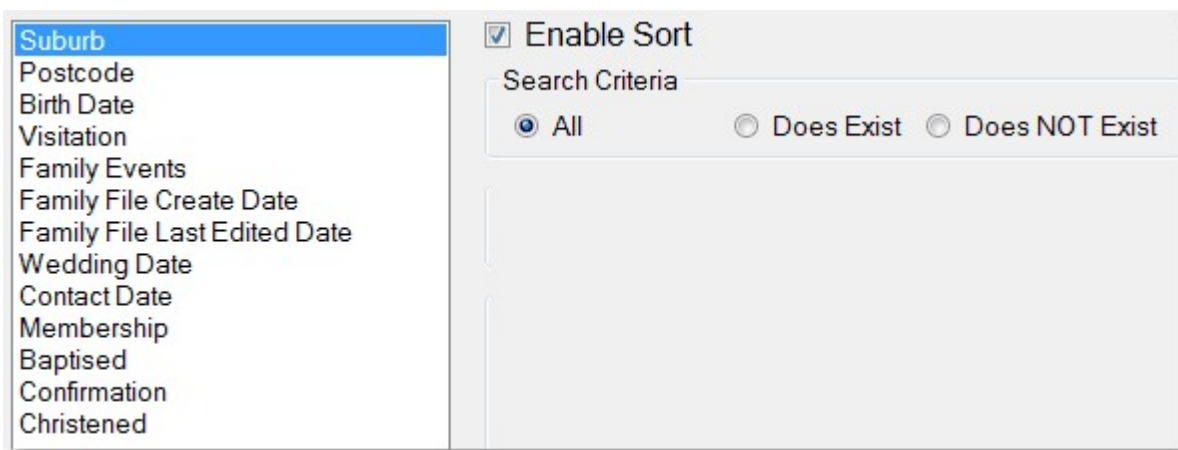
When you select Suburb, the options available are shown below. (Others have been hidden here just to make it easier to see what applies to a Suburb Sort)

Search Criteria

- ALL** Pass through all Suburbs (unless filtered elsewhere) and SORT the report on Suburb Order (Alphabetical on Suburb Name) If No Suburbs exist in a number of records, they will be grouped together.

- DOES EXIST** Pass through all Suburbs (unless filtered elsewhere) and SORT the report on Suburb Order (Alphabetical on Suburb Name) People with no Suburbs will be filtered out of the report.

- DOES NOT EXIST** No Sorting, however people will be passed through to the report if they do not have a suburb in their family file.



Post Code

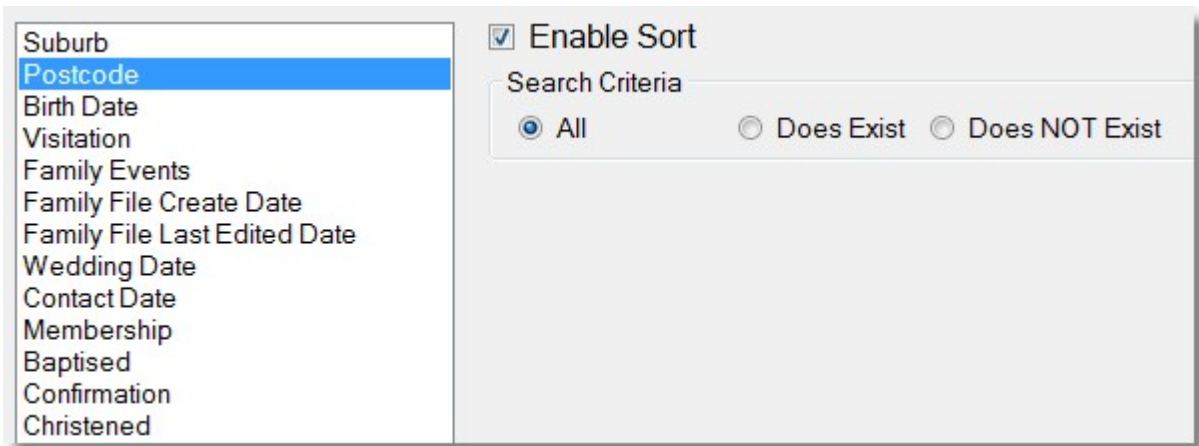
When you select Post Code, the options available are shown below. (Others have been hidden here just to make it easier to see what applies to a Post Code Sort)

Search Criteria

- ALL** Pass through all Post Codes (unless filtered elsewhere) and SORT the report on Post Code Order (Alpha / Numerical on Post Code) If No Post Codes exist in a number of records, they will be grouped together.

- DOES EXIST** Pass through all Post Codes (unless filtered elsewhere) and SORT the report on Post Code Order (Alpha / Numeric on Post Code People with no Post Codes will be filtered out of the report.

- DOES NOT EXIST** No Sorting, however people will be passed through to the report if they do not have a Post Code in their family file.



Birthdate

If a person has a Birthdate in their Individual section of the Family File, then you can do advanced date searching and sorting on this information. Naturally Sorting and Filtering on Date Information is only as good as the data entered, and if you do not have complete date information stored in the family file, some results may not be as expected.

Date Options

Every Date option shown below can be found by clicking on [Date Sorts](#) here.

<ul style="list-style-type: none"> Suburb Postcode <li style="background-color: #0070C0; color: white;">Birth Date Visitation Family Events Family File Create Date Family File Last Edited Date Wedding Date Contact Date Membership Baptised Confirmation Christened 	<p><input checked="" type="checkbox"/> Enable Sort</p> <p>Search Criteria</p> <p> <input checked="" type="radio"/> All <input type="radio"/> Does Exist <input type="radio"/> Does NOT Exist </p> <p>Order Date by</p> <p> <input checked="" type="radio"/> By Surname <input type="radio"/> By Month <input type="radio"/> By Date </p> <p>Date Search Criteria</p> <p> <input checked="" type="radio"/> All Dates </p> <p> <input type="radio"/> Month <input type="text" value="January"/> </p> <p> <input type="radio"/> Age <input type="text" value="1"/> To <input type="text" value="18"/> Years </p> <hr/> <p> <input type="radio"/> Date <input type="text" value="23/10/2012"/> </p> <p style="text-align: center;">To</p> <p> <input type="radio"/> Anniversary Date <input type="text" value="23/10/2012"/> </p> <p> <input type="radio"/> If Date does NOT exist </p>
---	--

Visitation

Perform Date sorts and filtering on Visitation Dates in Pastoral Care.

Date Options

Every Date option shown below can be found by clicking on [Date Sorts](#) here.

<ul style="list-style-type: none">SuburbPostcodeBirth DateVisitationFamily EventsFamily File Create DateFamily File Last Edited DateWedding DateContact DateMembershipBaptisedConfirmationChristened	<input checked="" type="checkbox"/> Enable Sort
	Search Criteria <input checked="" type="radio"/> All <input type="radio"/> Does Exist <input type="radio"/> Does NOT Exist
	Order Date by <input checked="" type="radio"/> By Surname <input type="radio"/> By Month <input type="radio"/> By Date
	Date Search Criteria <input checked="" type="radio"/> All Dates
	<input type="radio"/> Month <input type="text" value="January"/>
	<input type="radio"/> Age <input type="text" value="1"/> To <input type="text" value="18"/> Years
	<input type="radio"/> Date <input type="text" value="23/10/2012"/>
	<input type="radio"/> Anniversary Date To <input type="text" value="23/10/2012"/>
	<input type="radio"/> If Date does NOT exist

Family Events

Sort on Family Events stored in the Family File. See [Family Events](#) for information on this information stored in the Family file.

Date Options

Every Date option shown below can be found by clicking on [Date Sorts](#) here.

Suburb Postcode Birth Date Visitation Family Events Family File Create Date Family File Last Edited Date Wedding Date Contact Date Membership Baptised Confirmation Christened	<input checked="" type="checkbox"/> Enable Sort
	Search Criteria <input checked="" type="radio"/> All <input type="radio"/> Does Exist <input type="radio"/> Does NOT Exist
	Order Date by <input checked="" type="radio"/> By Surname <input type="radio"/> By Month <input type="radio"/> By Date
	Date Search Criteria <input checked="" type="radio"/> All Dates
	<input type="radio"/> Month <input type="text" value="January"/>
	<input type="radio"/> Age <input type="text" value="1"/> To <input type="text" value="18"/> Years
	<input type="radio"/> Date <input type="text" value="23/10/2012"/>
	<input type="radio"/> Anniversary Date To <input type="text" value="23/10/2012"/>
	<input type="radio"/> If Date does NOT exist

Family File Create Date

Every time a new Family File is created, a Created Date is saved in Pastoral Care. You can perform Date Filtering and Sorting on this [hidden] field.

Date Options

Every Date option shown below can be found by clicking on [Date Sorts](#) here.

The screenshot shows a software interface with two main panels. The left panel is a list of fields: Suburb, Postcode, Birth Date, Visitation, Family Events, **Family File Create Date** (highlighted in blue), Family File Last Edited Date, Wedding Date, Contact Date, Membership, Baptised, Confirmation, and Christened. The right panel is titled 'Enable Sort' and contains several sections: 'Search Criteria' with radio buttons for 'All', 'Does Exist', and 'Does NOT Exist'; 'Order Date by' with radio buttons for 'By Surname', 'By Month', and 'By Date'; 'Date Search Criteria' with radio buttons for 'All Dates', 'Month' (with a dropdown menu showing 'January'), 'Age' (with input boxes for '1' and '18' and the text 'Years'), 'Date' (with a date input box showing '23/10/2012' and a calendar icon), 'Anniversary Date' (with the text 'To' and a date input box showing '23/10/2012' and a calendar icon), and 'If Date does NOT exist'.

Family File Last Edited Date

Every time a new Family File is edited, a Family File Edited Date is saved in Pastoral Care. You can perform Date Filtering and Sorting on this [hidden] field.

Date Options

Every Date option shown below can be found by clicking on [Date Sorts](#) here.

The screenshot shows a software interface with two main panels. The left panel is a list of fields: Suburb, Postcode, Birth Date, Visitation, Family Events, Family File Create Date, Family File Last Edited Date (highlighted in blue), Wedding Date, Contact Date, Membership, Baptised, Confirmation, and Christened. The right panel is titled 'Enable Sort' and contains several sections: 'Search Criteria' with radio buttons for 'All', 'Does Exist', and 'Does NOT Exist'; 'Order Date by' with radio buttons for 'By Surname', 'By Month', and 'By Date'; and 'Date Search Criteria' with radio buttons for 'All Dates', 'Month' (with a dropdown menu showing 'January'), 'Age' (with input boxes for '1' and '18' and the text 'Years'), 'Date' (with a date input box showing '23/10/2012' and a calendar icon), 'Anniversary Date' (with a 'To' label and another date input box showing '23/10/2012' and a calendar icon), and 'If Date does NOT exist'.

Date Sorts

The fields shown below include a number of Date Fields that are setup by yourself in the Family File setup area. They are shown here as an example. Items such as Baptised, Born Again, Membership etc are all user defined date fields that can be applied to Individuals and in some cases, Families.



Click on each of the Date Filters on the sample screen below to learn about each of the particular Date Sorts and Filtering options in the Sort Window.

<ul style="list-style-type: none"> Suburb Postcode Birth Date Visitation Family Events Family File Create Date Family File Last Edited Date <li style="background-color: #0070C0; color: white;">Wedding Date Contact Date Membership Baptised Confirmation Christened 	<p><input checked="" type="checkbox"/> Enable Sort</p> <p>Search Criteria</p> <p><input checked="" type="radio"/> All <input type="radio"/> Does Exist <input type="radio"/> Does NOT Exist</p> <p>Order Date by</p> <p><input checked="" type="radio"/> By Surname <input type="radio"/> By Month <input type="radio"/> By Date</p> <p>Date Search Criteria</p> <p><input checked="" type="radio"/> All Dates</p> <p><input type="radio"/> Month January</p> <p><input type="radio"/> Age 1 To 18 Years</p> <hr/> <p><input type="radio"/> Date 23/10/2012</p> <p><input type="radio"/> Anniversary Date To 23/10/2012</p> <p><input type="radio"/> If Date does NOT exist</p>
---	--

Choose to Sort your report by Surname, or by Month or By Date

Order Date by

By Surname By Month By Date

Surname

Allows for filtering on dates without ordering the report particularly by date.

Month

Allows for filtering on dates and sorts the report into Months (ignoring the Day and Year component of the date)

Date

Sort chronologically in date order.



Click on each of the Date Search Criteria options (right) to learn more about each. Note, they are all shown as enabled and available below, but in practice, some options turn on and off depending on what you are sorting on.

Order Date by

By Surname By Month By Date

Date Search Criteria

All Dates

Month

Age To Years

Date

Anniversary Date To

If Date does NOT exist

Select All Dates to allow Pastoral Care to just find all people with no filtering on the date information, only sort the report in Date Order.

All Dates

Filter the report for the selected Date, and only find people who's Date exists within the selected month. This filter ignores all other information in the date, and only finds people who has a date within the month selected.

Month January

For Example, with January selected above, and the date type selected as Birthday, Pastoral Care will find all people with a birthday in January.

Find people who have a date that exists in the specified age range. For example, if 1-18 is entered, and Birthdate is selected, Pastoral Care will find all people who are 1 - 18 years old. If Baptised, then Pastoral Care will find all people who were baptised between 1 to 18 years ago!

Age 1 To 18 Years

The Date Option lets you enter a From and To date range. This will find all people who's date exists between that range entered.

Date

23/10/2012 To 31/03/2013



Press this icon to load the Date

Selection window, allowing you to pick a date. (Shown right)

October 2012

Mon	Tue	Wed	Thu	Fri	Sat	Sun
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Today: 23/10/2012

This search finds the Anniversary of the date searched on. For example, select Birth Date, and an Anniversary range of 1/1/2013 to 1/1/2013 and the program will find all people with a birthday on the 1st of January in any year. (In anniversary search, the year component of the date is ignored)

Anniversary Date

Naturally, no sorting on the Selected Date for this one! This option will find all people who have no information stored in the selected date.

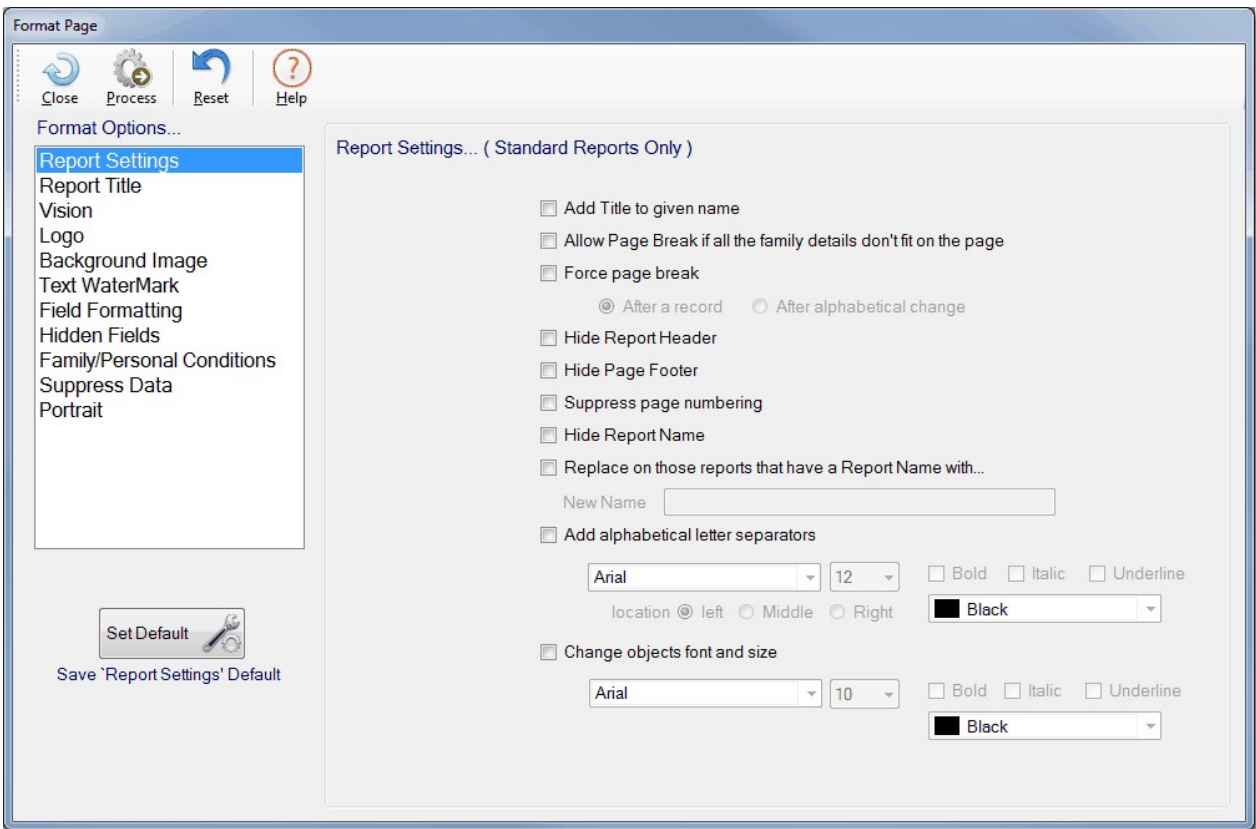
If Date does NOT exist

Format

The new Format Option brings together a number of formatting options in earlier versions of Pastoral Care.



Click on each part of the window below to learn more.



Process

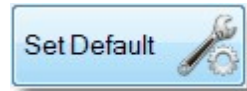
Press this button to run the selected report. If you have not selected any reports, this button will apply the formatting to the next selected report that you are going to run.



Set Default

Press this button to save the current settings as a default for the Formatting area.

You can set the default setting independently for EACH of the Format Options in this area.



Reset

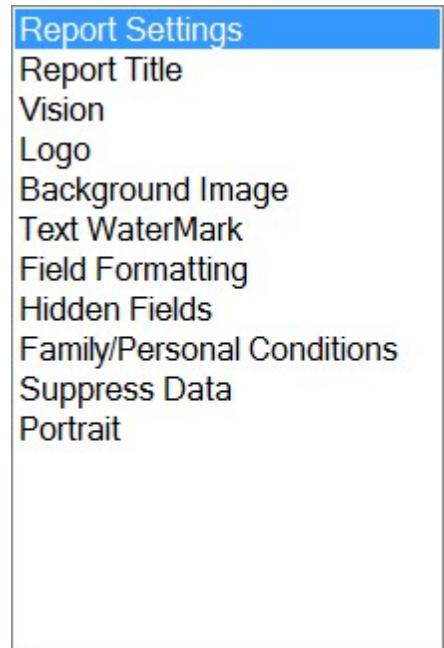
Reset the Formatting area to the default settings.



Format Options



Click on each item from the Format Options list (right) to find out more about each area.



Report Settings

The Report Settings area has heaps of power to allow you to fine tune any report in Pastoral Care. See each option below with it's description.

Add Title to given name

Tick this option to add a person's title to their given name.

Allow Page Break if all the family details don't fit on the page

Let Pastoral Care insert a page break within a family record if it won't fit on one page.

Force page break

After a record After alphabetical change

Force a page break after each individual or family, or after each Alphabetical change based on the first letter of the surname field.

Hide Report Header

Tick this option to not print the Report Header. This will leave off report titles, Vision, Dates etc

Hide Page Footer

Tick this option to suppress the page footer. This will hide page numbers etc.

Suppress page numbering

Tick this option to Turn off page numbering

Hide Report Name

Hide the default Pastoral Care report name

Replace on those reports that have a Report Name with...

New Name

Enter your own report name to replace the default Pastoral Care report name where one exists.

Add alphabetical letter separators

Add an Alphabetic Separator to separate people in groups based on the first letter of their surname. This option includes font options to adjust the way the Alpha Separator is displayed.

Change objects font and size

Change the DEFAULT font for the report. This can affect the look of a report greatly, so make only small changes. Using too large a font may result in some information not being displayed.

Report Title



Click on each of the Report Title options below to learn more about this feature.

Report Title... (Standard Reports - Custom Reports - Analysis Reports)

Current Title

Title Archive

- Belling South Membership List
- Belling South Admin Report

Add 

Clear 

Delete 

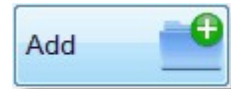
Up 

Down 

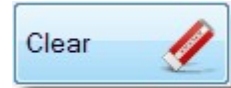
Include with 'Title'

- Todays Date
- Church Name
- Condition Filters
- Or & And Filters
- More Filters
- Data Filters
- Tag Filters

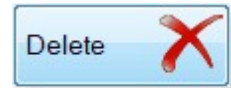
Enter a Report Title and press ADD to add it to the list of available titles to use.



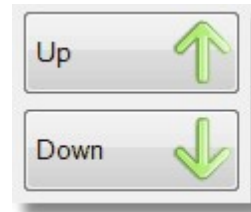
Clear the current title from being selected.



Delete the selected title from the list of available titles.



Use the arrow buttons to sort the list of Titles.



Todays Date

Tick this option to include the Date that the report was printed on in the report header.

Church Name

Tick this option to include your registered church name in the report header.

Condition Filters

Include information on the selected Condition Filters in the report header. Information such as Active, Privacy, Archive etc

Or & And Filters

Include a summary of the [Filter Logic](#) used to produce the report.

More Filters

Include a summary of the [More](#) filters used to produce the report.

Data Filters

Include a summary of the [Data](#) filters used to produce the report.

Tag Filters

Include a summary of the people tagged to produce the report.

Select a saved Title for use on the currently selected report.

Enter a New Title to use on the current report. You can save this title for use later by pressing the Add Button

The screenshot shows a text input field labeled 'Current Title' with a 'Title Archive' label below it. To the right is an 'Add' button with a folder icon and a green plus sign.

Vision

Tick the various options to put the church Vision Statement on your reports. The Vision Statement can be included on Report Headers and Page Footers.

Options exist here also for font formatting etc on the display of the Vision Statement on the report.

See [Setup Vision](#) for information on setting up your Vision Statement for use throughout all reporting areas.

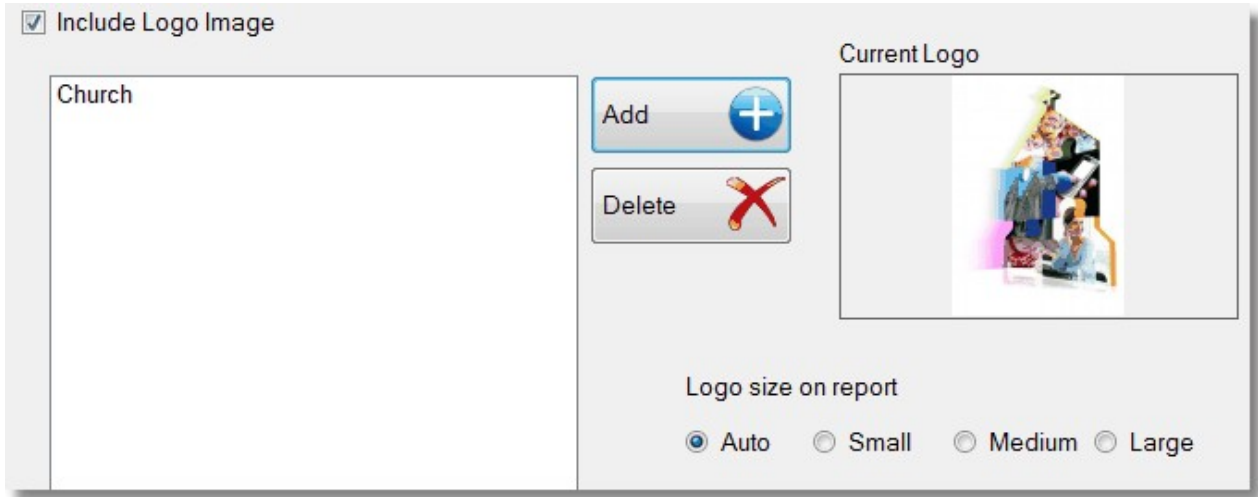
The 'Vision Text' dialog box contains a text input field with the text 'To Know God and Let Him be known.'. Below the input field are several options:

- Include Vision Statment in report header
- Include Vision Statment in page footer
- Font formatting options: Bold, Italic, Underline
- Alignment options: Left, Middle, Right
- Include thin line separator
- Include thick line separator
- Font: Arial (dropdown), 10 (spin box)
- Colour: Black (dropdown)

Logo

Tick the Include Logo Image to allow Pastoral Care to print a church logo on the selected report.

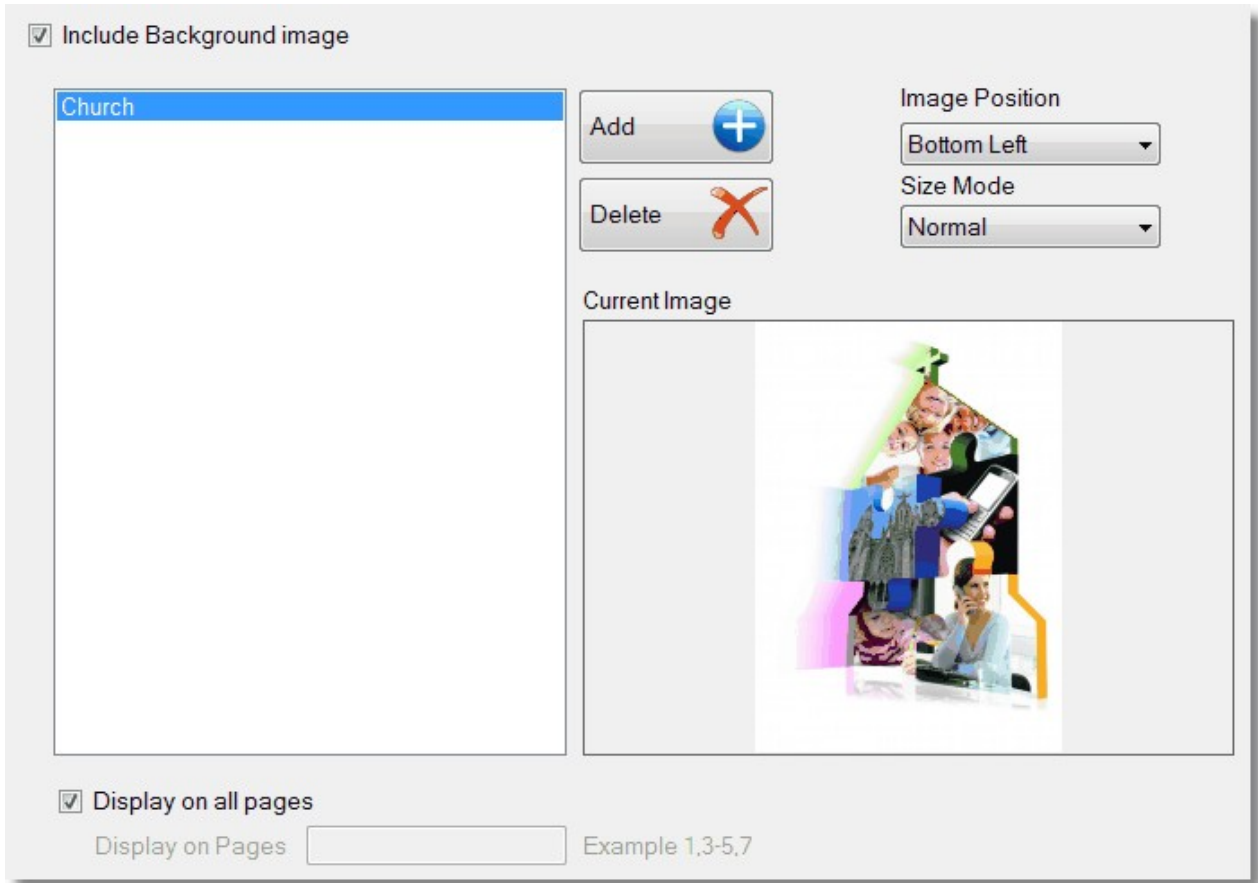
Use the Add Button to add a new image for use in reporting, and use Delete to remove a logo from Pastoral Care.



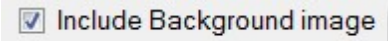
Background Image

Include an image as a background to your report. Click on each part of the window below to learn more.

Note, if you want the image to be faint like a watermark, rather than solid color, you will need to edit your image in a photo editing program to create an image exactly as you want. There is no settings in this feature to turn a full color picture into a faint watermark.



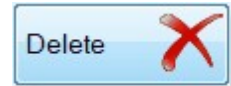
Tick this option to display (print also) a background image on the selected report.



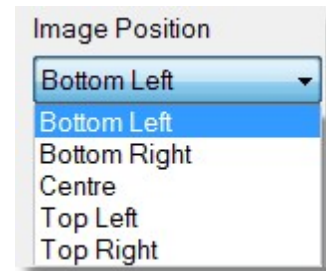
Use the Add feature to allow you to select and save a picture file for use in Pastoral Care.



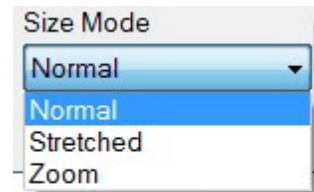
Delete an image from Pastoral Care.



Choose the position that you want the picture included on the report page.



Select the picture sizing mode. For best results, select Normal.



This preview window shows a small snapshot of the currently selected picture.



Tick the option Display on all pages to display the image on all report pages. Or untick this option and enter the page numbers that you want to print the image on.

The different examples of the correct method of entering pages are shown below. These are just examples, you can of course put in any range or selection of pages as long as separate each individual page with a comma, and any range of pages with a dash.

1,2,3,4,5,6,7,8

1,3,5,7,9,11

2,4,6,8

1-5,8,11

Text Watermark

Shown right is the setup for a Text based Watermark. Select the Font and Font Size, a Colour and enter the Text to include.

You can adjust the angle of the text from 0 Deg in 45 Degree steps.

Please Note: The Watermark is ONLY printed on the report, it is not visible in the report preview. A sample report below is shown with the settings used in the example here.

Names Report	
Albright	Stephen & Marlon
Angel	Peter & Belinda
Anglin	Helen
Baker	Brent & Kasey
Barton	Matthew,Levi,Keryn
Blackby	Joshua & Ruth
Blackby	Ray & Ethel
Brown	Erica,Karen
Chapman	Dot
Collins	Helen
Dimsey	Heather, Frank
Dober	Peter & Heather
Edson	Joshua, John
Edwards	Adrian & Ruth
Fleming	Hannah
French	Fred & Jill
Gordon	Stephen
Graham	Richard & Lorraine
Gray	Garah, Karen, Dodie, Mandy
Hanks	Hugo & Ruby
Harris	Jack & Edith
Heath	David & Helen
Ike	John & Julie
Jones	Lyndon, Meredith, Alister, Penny, Johnathon
Jury	Harry & Rose
Keen	Frank & Loma
Kend	Wendy, James
Knight	Rosa & Brook
Leah	Janka, Joel
Lynch	Peter
McCoy	John & Mary
Morton	Darrell & Annita
Nixon	Jammi & Angela
Other	Bill & Wendy
	Ben, Leanne, Peter
	Charles & Wendy
	Lauren, Ryan, Jill
	Phillip & Helen
	Steve & Jenny
	Nathan, Jannel
	Peter & Jenny
	Mica & Sue
	Michael, Rachel, Laura, Matthew
	Adam & Marg
	Nathan, Leanne
	Alan & Kerry
	Christopher, Adam, Mandy
	Darryl & Barbara
	Kylie, David
	Peter & Judy
	Paula, Christine
	Greg & Esther
	Bruce & Fran

To know God and let Him be known.

Page 1

Field Formatting

For any fields listed here, you can select the following options:

First Letter Upper Case, All Upper Case, All Lower Case

Surname	None
Given Name	None
Title	None
Residential Address	None
Residential Suburb	None
Residential State/Country	None
Postal Address	None
Postal Suburb	None
Postal State/Country	None

Hidden Fields

Tick any of the following fields to override a person's individual settings on Hidden.

<input type="checkbox"/> Preferred Given Name	<input type="checkbox"/> Personal Email	<input type="checkbox"/> Family Phone
<input type="checkbox"/> Title	<input type="checkbox"/> Family Email	<input type="checkbox"/> Family Mobile
<input type="checkbox"/> Birth Date	<input type="checkbox"/> Business email	<input type="checkbox"/> Personal Mobile
<input type="checkbox"/> Middle Name	<input type="checkbox"/> Family Fax	<input type="checkbox"/> Business Phone
<input type="checkbox"/> Other Surname	<input type="checkbox"/> Business Fax	
<input type="checkbox"/> Occupation		
<input type="checkbox"/> Residential Address		
<input type="checkbox"/> Postal Address		

Family/Personal Conditions

Tick the different Family Conditions and or Personal Conditions that you want to add to a person's name on a report.

Add family condition to surname

- Active
- Privacy Request
- Prospect
- Archive

Add individual condition to given name

- Active
- Privacy Request
- Prospect
- Archive
- Contact
- Deceased

Suppress Data

The Suppress data option allows you to remove information from a report simply by selecting it here.

Simply select the area (Personal, Status, Groups, Ministry etc) and then tick the items to suppress.

Suppress Data... (Standard Reports - Custom Reports)

Personal

- Status
- Individual Groups
- Ministry
- Medical
- Relationship
- Individual Dates
- Flexi Fields
- SMS List
- Email List
- Family Groups
- Family Dates

Personal...

- All of the Birth Date
- The year in Birth Date
- Other Surname
- Middle Name
- Personal Mobile
- Personal Email
- Business Phone
- Business email
- Business Fax
- Occupation
- School Year
- Residential Address
- Map Reference
- Postal Address
- Family Phone
- Family Email
- Family Mobile
- Family Fax

Portrait

Select various options on the Portrait Formatting area for control the Portrait object on some reports.

If Portrait Does Not Exist...

Tick this option to remove a family / individual from a report if they do not have a portrait image stored

Portrait Order


Set the priority order for Portrait Use in a report


Silhouette

Select a Silhouette to use if a family / individual are missing any portrait data.


If Portrait does not exists then Do Not add family to report

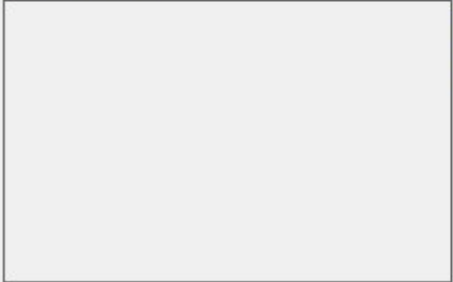
Order to find Family Portraits

<input checked="" type="checkbox"/> Family Portrait 1	Up 
<input checked="" type="checkbox"/> Family Portrait 2	
<input checked="" type="checkbox"/> Family Portrait 3	

Down 

Silhouette to display when no portrait available

No Silhouette 

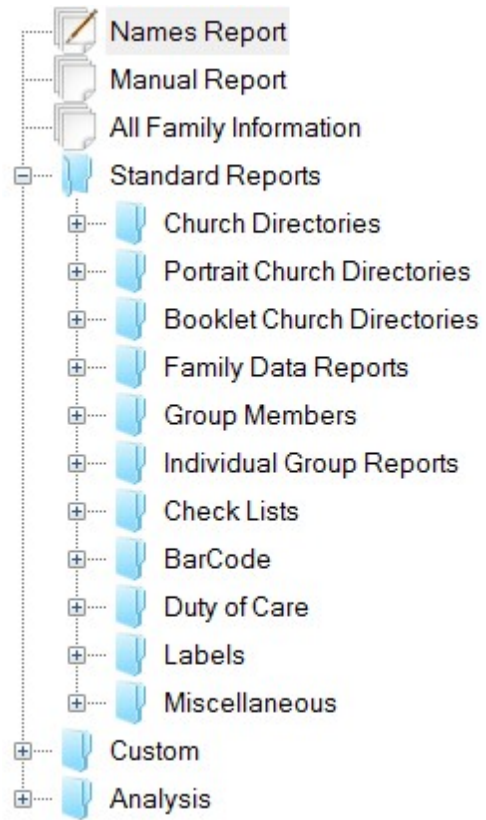


Silhouette's will not be displayed for Manual or All Information reports.

The Family Portraits order is determined by the Order to find Family Portraits option. When a report is in 'Individual' mode a person's individual portrait will be picked up if it exists while ignoring all family portraits.

Pastoral Care Reports Master List

The Pastoral Care Reports Master List is made up of several sections. Click on each section (right) to learn more about each reporting area available to you.

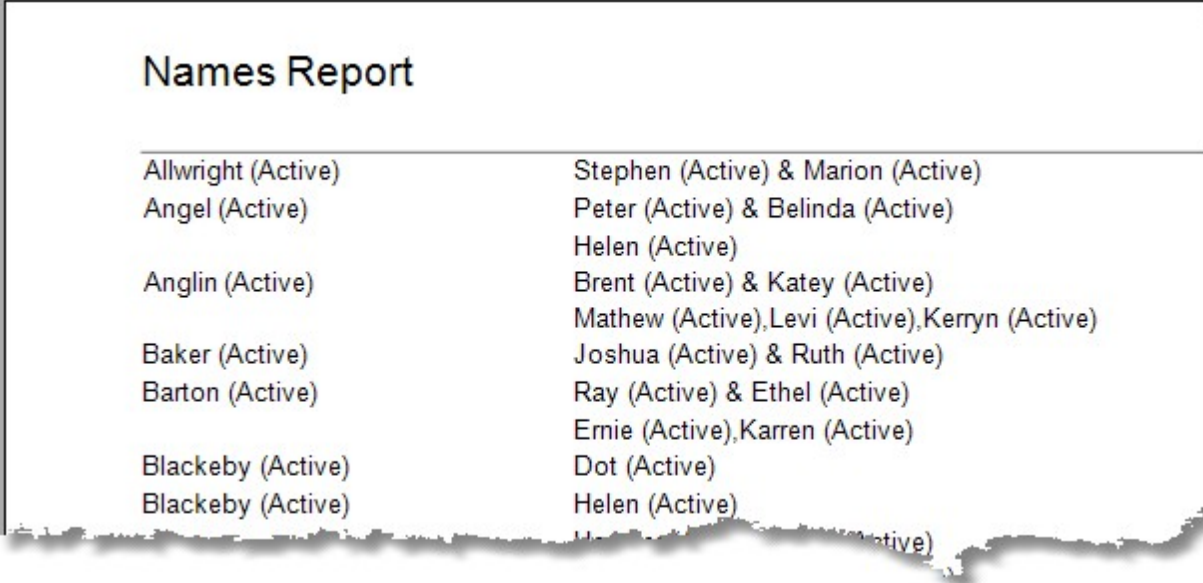


Names Report

The Names report is a simple report of just people's names. There are no pre-flight options for this report, simply double click to run, or combine with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Sample Report

Shown below is a sample Name Report. In this example we have turned on the formatting option to reveal people's Individual and Family Conditions



Names Report	
Allwright (Active)	Stephen (Active) & Marion (Active)
Angel (Active)	Peter (Active) & Belinda (Active)
	Helen (Active)
Anglin (Active)	Brent (Active) & Katey (Active)
	Mathew (Active), Levi (Active), Kerryn (Active)
Baker (Active)	Joshua (Active) & Ruth (Active)
Barton (Active)	Ray (Active) & Ethel (Active)
	Ernie (Active), Karren (Active)
Blackeby (Active)	Dot (Active)
Blackeby (Active)	Helen (Active)
	Maureen (Active)

Manual Report

The Manual report is a simple report with heaps of Power. Select fields that you want on the report and go! There are [Pre-Flight](#) options for this report that allow you to manipulate the report before viewing and printing. Combine also with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Pre-Flight

The Pre-Flight report options for the Manual Report are shown below. Click on each part of this screen for more details.

Manual Report Settings

<p>Individual Details</p> <ul style="list-style-type: none"> <input type="checkbox"/> Individual Condition <input type="checkbox"/> Gender <input type="checkbox"/> Preferred / Actual Name <input type="checkbox"/> Title <input type="checkbox"/> Birth Date <input type="checkbox"/> Other Surname <input type="checkbox"/> Middle Name <input type="checkbox"/> Personal Email <input type="checkbox"/> Personal Mobile <input type="checkbox"/> Business Phone <input type="checkbox"/> Business Email <input type="checkbox"/> Business Fax <p>Individual Dates</p> <div style="border: 1px solid gray; padding: 2px;"> <input type="checkbox"/> Membership <input type="checkbox"/> Baptised <input type="checkbox"/> Confirmation <input type="checkbox"/> Christened </div> <p>Flexi Fields</p> <div style="border: 1px solid gray; padding: 2px;"> <input type="checkbox"/> Elder <input type="checkbox"/> Blood Group </div>	<p>Family Details</p> <ul style="list-style-type: none"> <input type="checkbox"/> Residential Address <input type="checkbox"/> Postal Address <input type="checkbox"/> Phone <input type="checkbox"/> Family Mobile <input type="checkbox"/> Family Fax <input type="checkbox"/> Family Email <input type="checkbox"/> Other Contacts <input type="checkbox"/> Family Group <input type="checkbox"/> Family Events <input type="checkbox"/> Visitation <ul style="list-style-type: none"> <input type="checkbox"/> Include Pre Visitation Notes <input type="checkbox"/> Include Post Visitation Notes <p>Family Dates</p> <div style="border: 1px solid gray; padding: 2px;"> <input type="checkbox"/> Wedding Date <input type="checkbox"/> Contact Date </div>
--	---

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Tick any of the following individual fields to include on the report. Pastoral Care takes care of the layout of any options you tick.

Don't forget, these reports can be enhanced also with [Filters](#), [Sort](#) and [Format Options](#) for more control

<input checked="" type="checkbox"/> Individual Condition	<input type="checkbox"/> School Year
<input checked="" type="checkbox"/> Gender	<input type="checkbox"/> Occupation
<input checked="" type="checkbox"/> Preferred / Actual Name	<input type="checkbox"/> Status
<input checked="" type="checkbox"/> Title	<input type="checkbox"/> Individual Groups
<input checked="" type="checkbox"/> Birth Date	<input checked="" type="checkbox"/> Ministry
<input type="checkbox"/> Other Surname	<input type="checkbox"/> Medical
<input type="checkbox"/> Middle Name	<input type="checkbox"/> Relationship
<input type="checkbox"/> Personal Email	<input type="checkbox"/> SMS Lists
<input type="checkbox"/> Personal Mobile	<input type="checkbox"/> Email Lists
<input type="checkbox"/> Business Phone	
<input type="checkbox"/> Business Email	
<input type="checkbox"/> Business Fax	

Tick any of the following family fields to include on the report. Pastoral Care takes care of the layout of any options you tick.

Don't forget, these reports can be enhanced also with [Filters](#), [Sort](#) and [Format Options](#) for more control

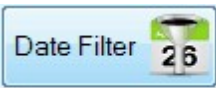
<input checked="" type="checkbox"/> Residential Address	<input checked="" type="checkbox"/> Family Condition
<input type="checkbox"/> Postal Address	<input type="checkbox"/> Family File Created & Last Edit Date
<input checked="" type="checkbox"/> Phone	<input type="checkbox"/> Family File Memo
<input checked="" type="checkbox"/> Family Mobile	<input type="checkbox"/> Family General Notes from NoteBook
<input checked="" type="checkbox"/> Family Fax	<input type="checkbox"/> Family Visitation Notes from NoteBook
<input checked="" type="checkbox"/> Family Email	<input type="checkbox"/> Personal Notes from NoteBook
<input checked="" type="checkbox"/> Other Contacts	<input type="checkbox"/> Include Portraits
<input type="checkbox"/> Family Group	
<input type="checkbox"/> Family Events	
<input checked="" type="checkbox"/> Visitation	
<input type="checkbox"/> Include Pre Visitation Notes	
<input type="checkbox"/> Include Post Visitation Notes	

Tick any of the Individual Dates to include on the report. Pastoral Care takes care of the layout of any options you tick.

Don't forget, these reports can be enhanced also with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Individual Dates

- Membership
- Baptised
- Confirmation
- Christened



If you select a date item, press the [Date Filter](#) button to set a filter for a date range for the selected date filter.

Tick any of the Family Dates to include on the report. Pastoral Care takes care of the layout of any options you tick.

Don't forget, these reports can be enhanced also with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Family Dates

- Wedding Date
- Contact Date



If you select a date item, press the [Date Filter](#) button to set a filter for a date range for the selected date filter.

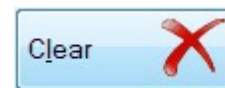
Tick any of the Flexi Fields to include on the report. Pastoral Care takes care of the layout of any options you tick.

Don't forget, these reports can be enhanced also with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Flexi Fields

- Elder
- Blood Group

Clear all settings on the Manual Reports window.



Select (tick) any enabled data filters and set a date range for locating (filtering) people in. Press Continue to return to the previous window.

Date Filtering

Activate Individual Date Filtering

Friday , 1 March 2013 [calendar icon]

To

Friday , 31 May 2013 [calendar icon]

Activate Family Date Filtering

Thursday , 25 October 2012 [calendar icon]

To

Thursday , 25 October 2012 [calendar icon]

Activate Family Event Date Filtering

Thursday , 25 October 2012 [calendar icon]

To

Thursday , 25 October 2012 [calendar icon]

Family Event date order

As entered Ascending Descending

Activate Visitation Date Filtering

Thursday , 25 October 2012 [calendar icon]

To

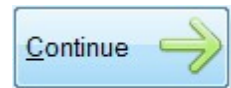
Thursday , 25 October 2012 [calendar icon]

Visitation dates ordered by...

As entered Ascending

Continue →

Press Continue to display the Manual Report.



Sample Report

Shown below is a Manual Report sample. Your actual report output will vary depending on the fields you have selected in the [Pre-Flight](#) area.

Manual Report Design		
Allwright (Active)	Stephen (Active) & Marion (Active) 11 Blackdog Road Riddels Creek 3412 VIC	054-33-5478 Family Condition = Active
	Stephen Individual Condition = Active Birth Date: 03/07/1945	
	Marion Individual Condition = Active Birth Date: 05/07/1946	
	Date Requested By...	Assigned To...
Visitation:	06/08/1993	Graham Lawson
Angel (Active)	Peter (Active) & Belinda (Active) Helen (Active) 12 Water Way Crt Gisborne 3444 VIC Map: 11 Ref: A6	054-22-1199 peter@spirit.com.au Family Condition = Active
	Peter Individual Condition = Active Gender: Female Birth Date: 09/06/1965	

All Family Information

The All Family Information report is a large report with heaps of data on it. it's intent is to have a report that shows everything you have stored in the family file. There are [Pre-Flight](#) options for this report that allow you to manipulate the report before viewing and printing. Combine also with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Pre-Flight

Shown below are the pre-flight options for the All Family Information report. Choose from a range of Date Filters, Date Sorting and Include Options for adding more to or removing information from this report.

All Information Report Options

<input checked="" type="checkbox"/> Include Residential Address <input checked="" type="checkbox"/> Include Postal Address <input type="checkbox"/> Include Portraits	<input type="checkbox"/> Family File Memo <input type="checkbox"/> Family General Notes from NoteBook <input type="checkbox"/> Family Visitation Notes from NoteBook <input type="checkbox"/> Personal Notes from NoteBook
---	---

<input type="checkbox"/> Activate Individual Date Filtering <div style="margin-left: 20px;"> <input type="text" value="Thursday ,25 October 2012"/> </div> <div style="margin-left: 40px;">To</div> <div style="margin-left: 20px;"> <input type="text" value="Thursday ,25 October 2012"/> </div>	<input type="checkbox"/> Activate Family Date Filtering <div style="margin-left: 20px;"> <input type="text" value="Thursday ,25 October 2012"/> </div> <div style="margin-left: 40px;">To</div> <div style="margin-left: 20px;"> <input type="text" value="Thursday ,25 October 2012"/> </div>
---	---

<input type="checkbox"/> Activate Family Event Date Filtering <div style="margin-left: 20px;"> <input type="text" value="Thursday ,25 October 2012"/> </div> <div style="margin-left: 40px;">To</div> <div style="margin-left: 20px;"> <input type="text" value="Thursday ,25 October 2012"/> </div>	<input type="checkbox"/> Activate Visitation Date Filtering <div style="margin-left: 20px;"> <input type="text" value="Thursday ,25 October 2012"/> </div> <div style="margin-left: 40px;">To</div> <div style="margin-left: 20px;"> <input type="text" value="Thursday ,25 October 2012"/> </div>
---	---

<p>Family Event date order</p> <input checked="" type="radio"/> As entered <input type="radio"/> Ascending <input type="radio"/> Descending	<p>Visitation dates ordered by...</p> <input checked="" type="radio"/> As entered <input type="radio"/> Ascending <input type="radio"/> Descending <input checked="" type="checkbox"/> Include Pre Visitation notes <input checked="" type="checkbox"/> Include Post Visitation notes
---	---

Sample Report

Shown below is a sample All Information Report.

All Information Report

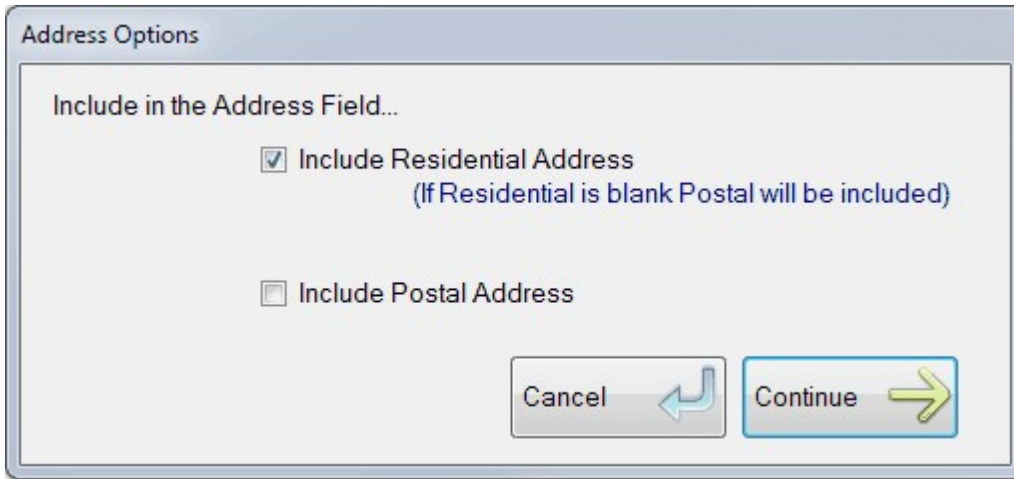
Allwright (Active)	Stephen (Active) & Marion (Active)	054-33-5478															
	11 Blackdog Road Riddels Creek 3412 VIC	Family Condition = Active File Last Edit: 29/11/2008															
Stephen	Individual Condition: Active Title: Mr. Birth Date: 03/07/1945 Email: stephen@spirit.com.au Mobile Phone: 041234567890 Business Phone: 018-998725																
Marion	Individual Condition: Active Title: Mrs. Birth Date: 05/07/1946 Mobile Phone: 041234567890 Business Phone: 054-229876 Business Email: business email																
Occupation:	Stephen	Plumber															
	Marion	Doctor															
Status:	Stephen	Deacon, Committed Attender															
	Marion	Committed Attender															
Individual Group:	Stephen	Property Maintenance, Youth Group 2, Bible Study 3, Home Group 1, Aerobics Outreach															
	Marion	Property Maintenance, Home Group 2, Home Group 3, Catering Staff, Bible Study 3															
Individual Date:	Stephen	<table border="1"> <thead> <tr> <th>Date</th> <th>Description</th> <th>Tag</th> </tr> </thead> <tbody> <tr> <td>01/01/1989</td> <td>Membership</td> <td>X</td> </tr> <tr> <td>05/05/1992</td> <td>Baptised</td> <td>X</td> </tr> <tr> <td>03/03/1991</td> <td>Confirmation</td> <td></td> </tr> <tr> <td>03/03/1994</td> <td>Christened</td> <td></td> </tr> </tbody> </table>	Date	Description	Tag	01/01/1989	Membership	X	05/05/1992	Baptised	X	03/03/1991	Confirmation		03/03/1994	Christened	
Date	Description	Tag															
01/01/1989	Membership	X															
05/05/1992	Baptised	X															
03/03/1991	Confirmation																
03/03/1994	Christened																
	Marion	<table border="1"> <tbody> <tr> <td>01/01/1989</td> <td>Membership</td> <td>X</td> </tr> <tr> <td>05/05/1992</td> <td>Baptised</td> <td>X</td> </tr> </tbody> </table>	01/01/1989	Membership	X	05/05/1992	Baptised	X									
01/01/1989	Membership	X															
05/05/1992	Baptised	X															
Flexi Field:	Stephen	Elder															
		David Wilson															
SMS List:	Stephen	Leadership List															
	Marion	All Church List, Leadership List															
Email List:	Stephen	All Church List															
	Marion	All Church List, Leadership List															
Family Contacts:	Holiday House	58 456 8792															
Family Group:	Main Church, Home Group 1																
Family Events:	20/03/1995 Marions Mum died																
Family Date:	04/07/1969	Wedding Date															
	03/01/1973	Contact Date															
Visitation:	06/08/1993	Requested By... Assigned To... Graham Lawson															
	(Post Visit Note - Marien has requested prayer for her mother)																

Church Directories

Pastoral Care has 10 standard church directories. There are [Pre-Flight](#) options for these 10 reports that allow you to manipulate them before viewing and printing. Combine also with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Pre-Flight

The Pre-Flight options for Church Directories are shown below.



Sample Report

Shown below is a sample Church Directory. Note, even though we are showing you only 1 report here, there are plenty more to choose from, including designing your own with [Custom Directory Designer](#) or [Custom Report Designer](#)

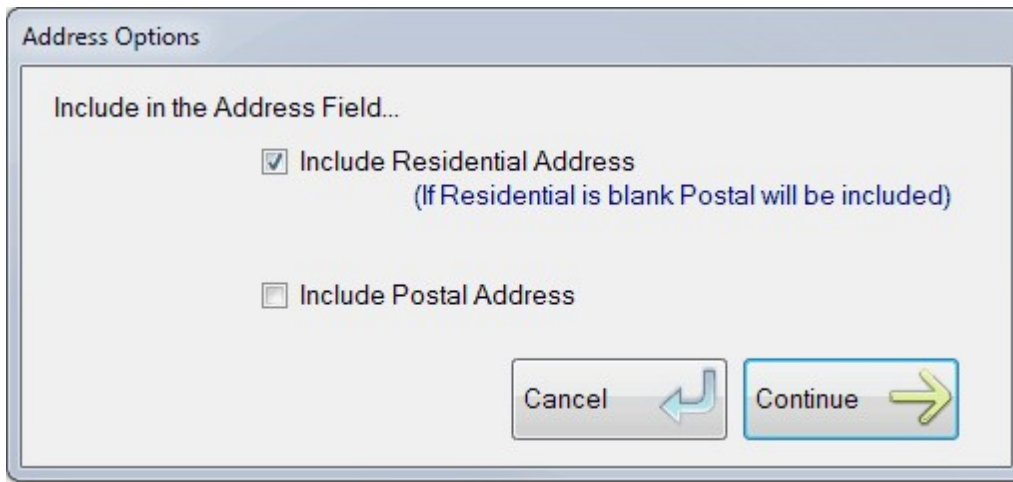
Directory 1		
Allwright (Active)	Stephen (Active) & Marion (Active) 11 Blackdog Road Riddels Creek 3412 VIC	054-33-5478
Angel (Active)	Peter (Active) & Belinda (Active) Helen (Active) 12 Water Way Crt Gisborne 3444 VIC Map: 11 Ref: A6	054-22-1199 peter@spirit.com.au
Anglin (Active)	Brent (Active) & Katey (Active) Mathew (Active), Levi (Active), Kerryn (Active) 10 Marsh Road Keilor Heights 3191 VIC Map: 15 Ref: A4	03-273214 Brentl@spirit.com.au 041234567890
Baker (Active)	Joshua (Active) & Ruth (Active) 34 Heidelberg Rd Ivanhoe 3333	
Barton (Active)	Ray (Active) & Ethel (Active)	03-744-1229

Portrait Church Directories

Pastoral Care has 10 Portrait (photo) church directories. There are [Pre-Flight](#) options for these 10 reports that allow you to manipulate them before viewing and printing. Combine also with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Pre-Flight

The Pre-Flight options for Church Portrait Directories are shown below.



Sample Report

Shown below is a sample Church Portrait Directory. Note, even though we are showing you only 1 report here, there are plenty more to choose from, including designing your own with [Custom Directory Designer](#) or [Custom Report Designer](#)

Directory 1



Allwright (Active)

Stephen (Active) & Marion (Active)
11 Blackdog Road
Riddels Creek 3412 VIC
054-33-5478



Angel (Active)

Peter (Active) & Belinda (Active)
Helen (Active)
12 Water Way Crt
Gisborne 3444 VIC
Map: 11 Ref: A6
054-22-1199
peter@spirit.com.au

Booklet Church Directories

Pastoral Care has 6 Booklet church directories. There are [Pre-Flight](#) options for these reports that allow you to manipulate them before viewing and printing. Combine also with [Filters](#), [Sort](#) and [Format Options](#) for more control.

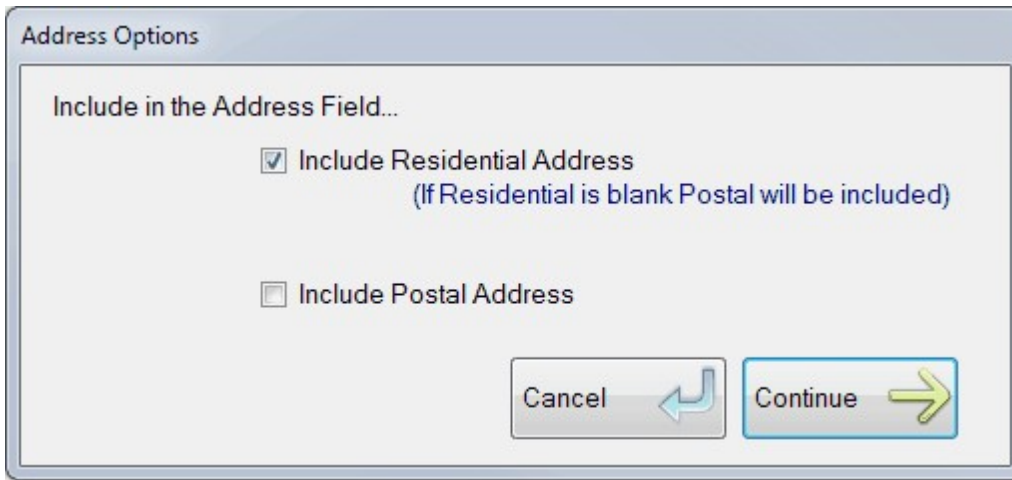
What is a Booklet Report

A Booklet report is a report formatted for A5 paper, but printed in A4 paper, in landscape orientation, 2 x A5 page layouts on 1 x A4 face. These can be simply assembled in order and folded in half (stapled if needed) to produce a correctly formatted alphabetically sorted and page numbered report. Any report can be changed to a Booklet report using the Print - Booklet option on the Report Viewer, however some reports in Pastoral Care are intentionally designed for booklet printing.

See [Print Options](#) on the Report Viewer Toolbar for more information on setups for Booklet Printing.

Pre-Flight

The Pre-Flight options for Church Booklet Directories are shown below.



Sample Report

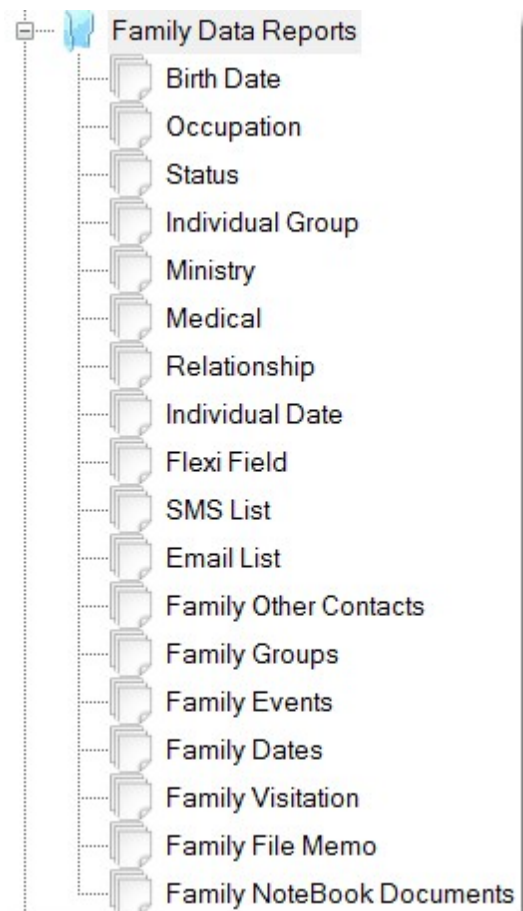
Shown below is a sample Church Booklet Directory. Notice that the print is larger than normal, this is so when the report is automatically shrunk to fit into A5 format that the report is still readable.

Booklet 1		
Allwright (Active)	Stephen (Active) & Marion (Active) 11 Blackdog Road Riddels Creek 3412 VIC	054-33-5478
Angel (Active)	Peter (Active) & Belinda (Active) Helen (Active) 12 Water Way Crt Gisborne 3444 VIC Map: 11 Ref: A6	054-22-1199 peter@spirit.com.au
Anglin (Active)	Brent (Active) & Katey (Active) Mathew (Active) Levi	03-273214 Brentl@spirit.com.au 041234567890

Family Data Reports

Family Data Reports cover every data field stored in the family file. There are 18 reports in this area. Each Report available is listed here. We will not be showing you samples for every report listed here.

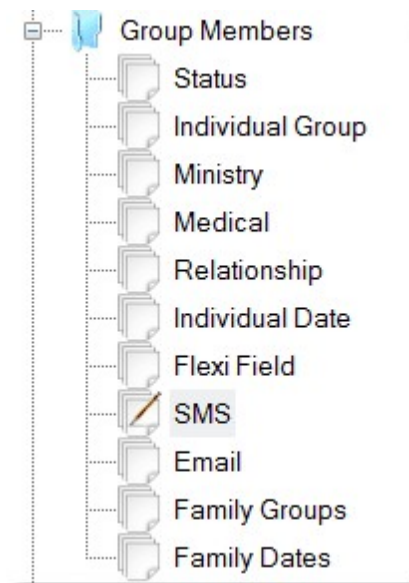
There are only a few Pre-Flight options some of these reports that involve mainly Date Filters, and these are self explanatory. Combine also with [Filters](#), [Sort](#) and [Format Options](#) for more control.



Group Members

Group Member Reports cover every group stored in Pastoral Care. They are reports that shows the groups, and lists the names of people in those groups. There are 11 reports in this area. Each Report available is listed here. We will not be showing you samples for every report listed here.

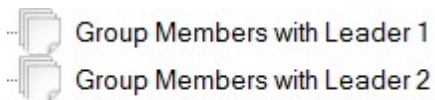
There are no Pre-Flight options for these reports. Combine also with [Filters](#), [Sort](#) and [Format Options](#) for more control.



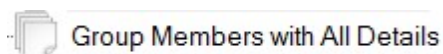
Individual Group Reports

There are 7 Individual Group Reports in Pastoral Care. The only pre-flight options are on the last 2 reports, they have the capacity for date filtering. Simply double click on any report in Pastoral Care to run, or combine with [Filters](#), [Sort](#) and [Format Options](#) for more control.

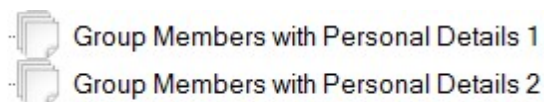
See a description of each report below.



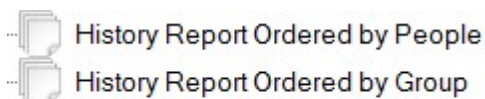
Two different reports showing Group Members of every Individual group along with the group leaders name.



A report that shows for all Individual Groups, names of people attending those groups, and all group details.



Two different reports showing group members along with useful person contact information for each member. This report is ideal for group leaders to have as a resource for contacting their group members.



Two Group History Reports. These reports show the Names of People, what groups they are in, and what date they joined and left the group.

The Pre-Flight options for this report allow you to sort by various dates, and filter by various dates.

Check Lists

Pastoral Care has 17 pre-formatted check lists. These are ideal for use in taking a Roll for church or other group meetings. When combined with [Filters](#), you can easily create a list for one group only. For Example Scouts, Junior Church, home groups etc.

There are no Pre-Flight options for the Check Lists.

Also remember, that if you cannot find a check list that suit's you, you can design your own in [Custom Report Designer](#).

Bar Code

Bar Code reports are very useful for managing people in a more efficient manner. For example, if you use the reports Barcode 5 or Barcode 6, these are a tick list type report allowing you to mark a person off with a tick, and later you can scan in the roll results by simply scanning everyone with a tick.

The only pre-flight options on these reports are on the two Name Tag bar code reports. The pre-flight options for those reports allows you to select the Name Tag profile to use.

Also remember, that if you cannot find a Bar Code report that suit's you, you can design your own in [Custom Report Designer](#).

Duty of Care

Pastoral Care has 16 pre-formatted Duty of Care reports. These are designed specifically for Sign In and Sign Out reports. If you use a Sign In /Sign Out sheet, you have just completed your data collection for a Roll. Simply use the Roll Program to save that gathered information and you have permanent record of each person / child who has attended that meeting.

When combined with [Filters](#), you can easily create a list for one group only. For Example Scouts, Junior Church, home groups etc.

There are no Pre-Flight options for the Duty Of Care Reports.

Also remember, that if you cannot find a Duty Of Care Report that suit's you, you can design your own in [Custom Report Designer](#). Why not design one that includes a Bar Code so you can do your data entry into Pastoral Care in record time!

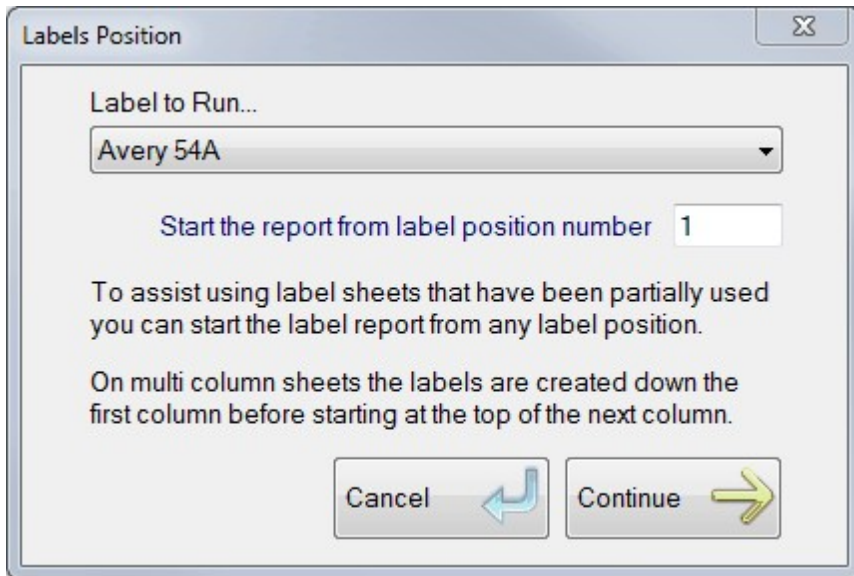
Labels

Pastoral Care Labels are now controlled by multiple profiles that you can setup yourself for different label manufactures and sizes etc. (See [Mailing Labels](#) setup area for more information)

When combined with [Filters](#), you can easily create labels for one group only or a number of groups. For Example Scouts, Junior Church, Home groups etc.

Labels can be formatted for Families or Individuals (as all reports can be). See [Format](#) for options on this.

There is one pre-flight option for labels. That is shown below.



Please Note, even though the Label selected in the example above says Avery 54A, this does not indicate that we have setup all the Avery label sizes for you. You must program each label that you want to use in the [Mailing Labels](#) setup area.

Miscellaneous

There are 3 Reports in the Miscellaneous category. Combine also with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Family Edited and Created

This report shows for each family in Pastoral Care, the date their file was created, and the date that each file was last edited. A partial sample of this report is shown below.

Family File Created & Last Edit Report

		Created	Last Edit
Allwright	Stephen & Marion		29/11/2009
Angel	Peter & Belinda		27/07/2012
Anglin	Helen Brent & Katey		29/11/2009
Baker	Mathew, Levi, Kerryn Joshua & Ruth	04/08/2012	02/09/2012
Barton	Ray & Ethel Ernie, Karren		27/07/2012
Blackeby	Dot		29/11/2009
Blackeby	Helen		27/07/2012
Brown	Heather, Frank Peter & Heather Joshua, John		29/11/2009

Individual Preferred Name

This report lists for each individual in Pastoral Care, their preferred first name if one has been entered in their personal details in their family file. A partial sample of this report is shown below.

Surname	Actual Given Name	Preffered Name
Baker	Joshua	Josh
Baker	Ruth	Ruthie
Barton	Ray	Big Ray
Barton	Ethel	Mum

School Year

The School Year Report shows for each person who has a School Year recorded against their name, their Name and School Year. A partial sample of this report is shown below.

School Year Report

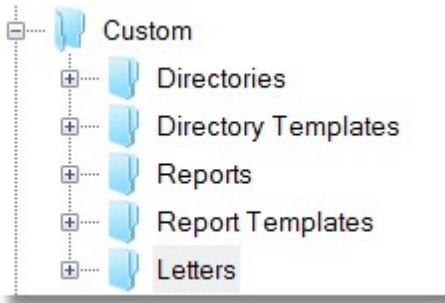
		School Year
Angel	Helen	5
Anglin	Mathew	6
Anglin	Levi	7
Anglin	Kerryn	9
Barton	Ernie	3
Barton	Karren	4
Blackeby	Heather	5
Blackeby	Frank	3
Brown	Joshua	9
Brown	John	11
Collins	Stephen	12
Dimsey	Dodie	3

Custom

The Custom list of reports in Pastoral Care is where you can access your Custom Directories, Custom Reports and Custom Letters.



Click on each item below for more information.



Directories

Custom Directories are directories that you have designed with [Custom Directory Designer](#).

Simply Double Click on the report name to run, or press Full Display to see all Custom Directories in another window.

Don't forget, you can combine any custom report of any type with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Directory Templates

Custom Directory Templates are directories that we have designed ourselves and distributed to you through Pastoral Care, or via our web site.

Simply Double Click on the report name to run, or press Full Display to see all Custom Directory templates in another window.

Don't forget, you can combine any custom report of any type with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Reports

Custom Reports are reports that you have designed with [Custom Report Designer](#).

Simply Double Click on the report name to run, or press Full Display to see all Custom Reports in another window.

Don't forget, you can combine any custom report of any type with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Report Templates

Custom Report Templates are Reports that we have designed ourselves and distributed to you through Pastoral Care, or via our web site.

Simply Double Click on the report name to run, or press Full Display to see all Custom Report templates in another window.

Don't forget, you can combine any custom report of any type with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Letters

Custom Letters are reports (written as letters) that you have designed with [Custom Letter Writer](#).

Simply Double Click on the report name to run, or press Full Display to see all Custom Letters in another window.

Don't forget, you can combine any custom report of any type with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Analysis

The Analysis area in Pastoral Care replaces the previous version feature called Data Analysis. Having moved Data Analysis out of its own area, and now including it in Create Reports has added additional power that we did not have before. You can now run Analysis reports on the whole church from here, or just on one subset of your church.

Previously, you were able to run a report on say Age demographics, now you can run that report on Men only, or Women Only, or people in home groups, or people not in home groups etc. In Fact, **ALL** analysis reports can now be manipulated with all Pastoral Care standard [Filters](#), [Sort Options](#) and [Format Options](#) for even more power and control.



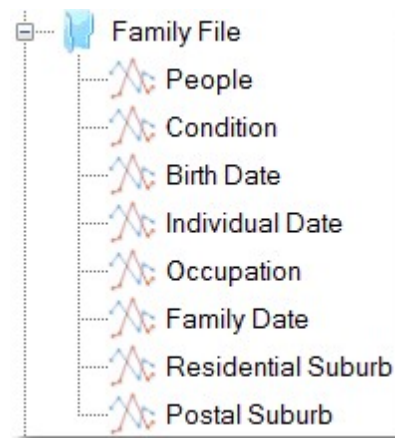
Click on each Analysis reporting area below to learn more.



Family File

The Family File Analysis reports are designed to give you a great overall view of the demographics in your church.

Do you know how many Single Parents you have in your church? How many Adults with a deceased child? How many people are married without children? This reporting area has so many informative reports, we have documented each one of them here, with samples. Click on each report shown here for more information.



The People report gives you great demographics on the makeup of your church. Percentages and numbers of people in different categories makes this report a must for learning about the type of people you have in your church group.

In addition to using this report on the whole church, you can now use filters to find out more about selected groups of people. All the power of [Filters](#) and [Format](#) controls can be used in these reports.

The Pre-Flight options for the People Analysis report are shown below.

Adult Age

Set the Adult Age for the report. If a birth date is not available, Pastoral Care will use the Adult / Child position in the family file to decide who are Adults and Children in this report.

Graph Options

Enable Graph Tick the Enable Graph Option to turn on graphs on this report. (Recommended)

Graph Type Select the graph type for this report.

Ignore Zero Leave zero values off the chart. This will remove categories from the chart that have not got any data against them

Chart Backwall Turn on a background colour and set that colour with the Backwall Colour option

Colour Theme Set a colour them to make your graphs look really cool! Simple to use and already have a great selection of complimentary colours.

Report Options

Adult age begins at.. 18

Age Calculated based on today's date being:
Saturday ,27 October 2012

Enable Graph

Graph type
Bar 2D

Single colour
Blue

Ignore Zero Values

Enabled chart backwall

Colour theme
Autumn

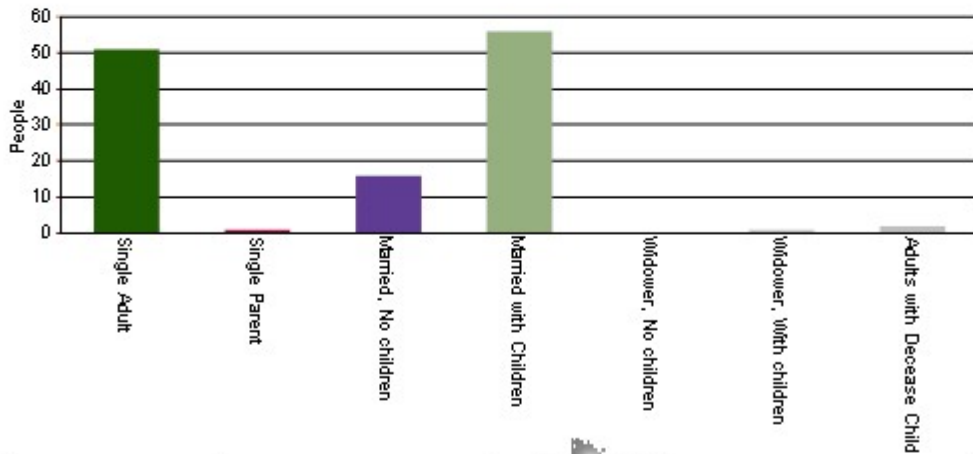
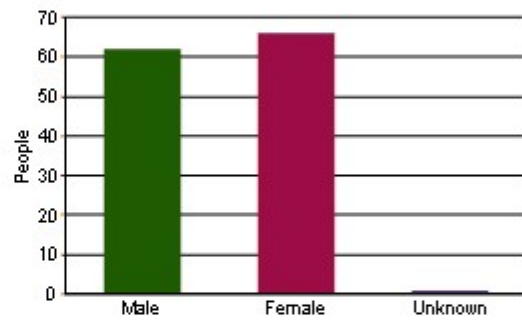
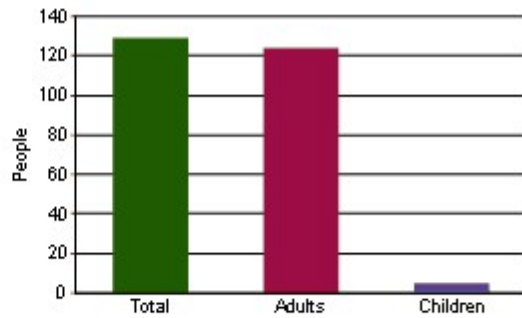
Backwall colour
White

Cancel Continue

People Analysis

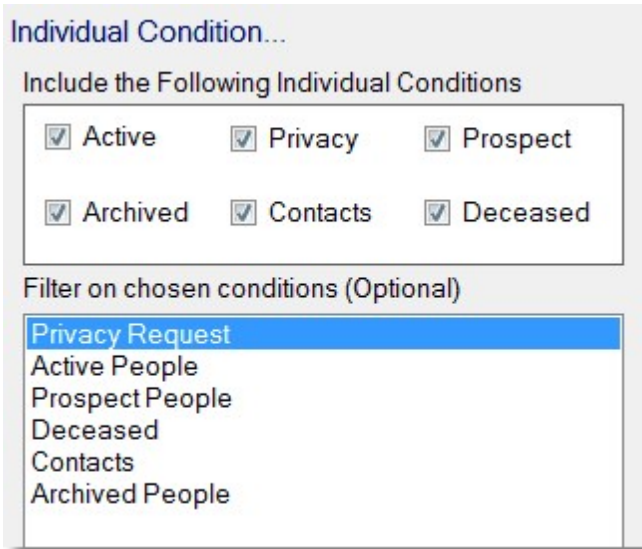
Adult age is determined when a person turns 18 based on today's date being 27/10/2012

	Amount	%
Total People	129	100
Adults	124	96.1
Children	5	3.9
Adult Male	61	47.3
Adult Female	63	48.8
Child Male	1	0.8
Child Female	3	2.3
Male Total	62	48.1
Female Total	66	51.2
Unknown	1	0.8
Single Adults	51	39.5
Single Parents	1	0.8
Married, No Children	16	12.4
Married With Children	56	43.4
Widower, No Children	0	0
Widower, With Children	1	0.8
Adults With Decease Chik	2	1.6
Total Family Files	39	



The Condition Report shows how many people in the various Family Condition categories, and Individual Condition Categories. As the [Filters](#) are in play on these reports, you will need to go into filters to enable all the conditions for this report to be accurate and useful.

Shown below is the Individual Conditions all turned on in the filters area ready to run this report. You should do the same also for Family Conditions.



The Pre-Flight options for the Condition Analysis report are shown below.

Graph Options

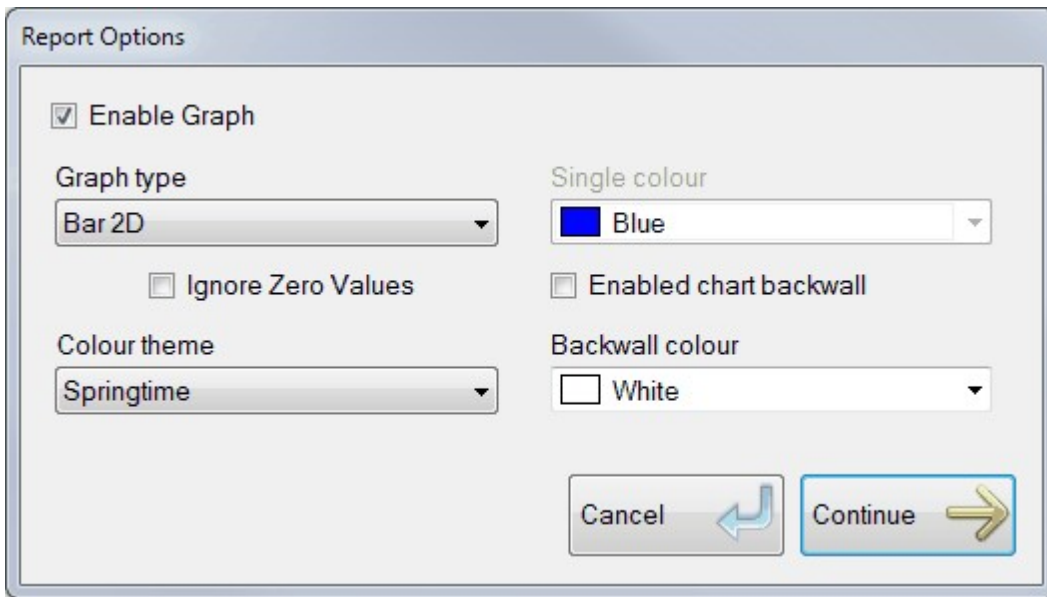
Enable Graph Tick the Enable Graph Option to turn on graphs on this report. (Recommended)

Graph Type Select the graph type for this report.

Ignore Zero Leave zero values off the chart. This will remove categories from the chart that have not got any data against them

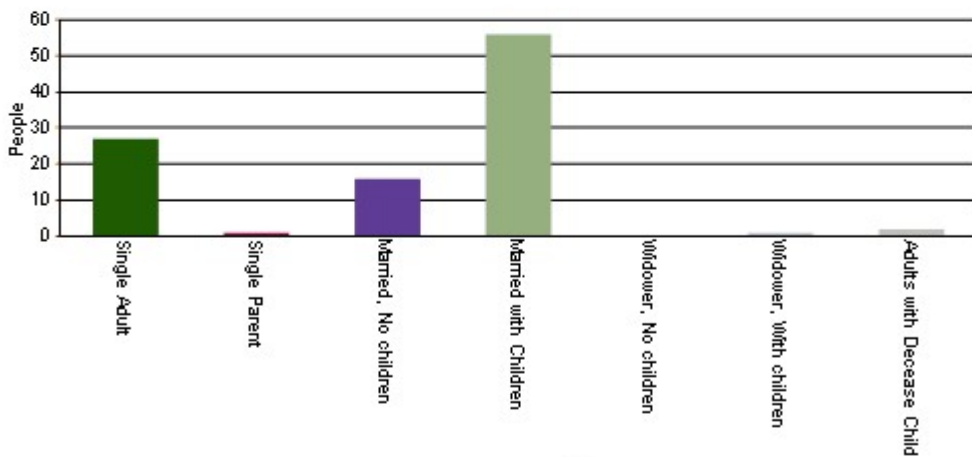
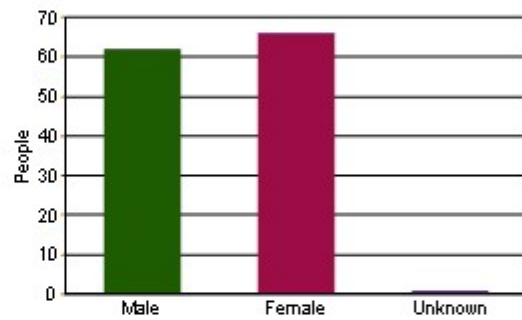
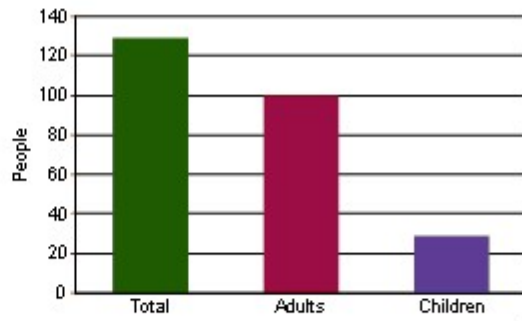
Chart Backwall Turn on a background colour and set that colour with the Backwall Colour option

Colour Theme Set a colour them to make your graphs look really cool! Simple to use and already have a great selection of complimentary colours.



People Analysis

	Amount	%
Total People	129	100
Adults	100	77.5
Children	29	22.5
Adult Male	47	36.4
Adult Female	53	41.1
Child Male	15	11.6
Child Female	13	10.1
Male Total	62	48.1
Female Total	66	51.2
Unknown	1	0.8
Single Adults	27	20.9
Single Parents	1	0.8
Married, No Children	16	12.4
Married With Children	56	43.4
Widower, No Children	0	0
Widower, With Children	1	0.8
Adults With Decease Chik	2	1.6
Total Family Files	39	



The Birth Date report gives you great demographics on the age spread of people in your church. Percentages and numbers of people in different age groups makes this report a must for learning about the type of people you have in your church group.

In addition to using this report on the whole church, you can now use filters to find out more about selected groups of people. All the power of [Filters](#) and [Format](#) controls can be used in these reports.

The Pre-Flight options for the Birth Date Analysis report are shown below.

Adult Age

Set the Adult Age for the report. If a birth date is not available, Pastoral Care will use the Adult / Child position in the family file to decide who are Adults and Children in this report.

Graph Options

Enable Graph

Tick the Enable Graph Option to turn on graphs on this report. (Recommended)

Graph Type

Select the graph type for this report.

Ignore Zero

Leave zero values off the chart. This will remove categories from the chart that have not got any data against them

Chart Backwall

Turn on a background colour and set that colour with the Backwall Colour option

Colour Theme

Set a colour them to make your graphs look really cool! Simple to use and already have a great selection of complimentary colours.

Report Options

Adult age begins at.. 18

Age Calculated based on today's date being:
Saturday .27 October 2012

Enable Graph

Graph type: Bar 2D

Single colour: Blue

Ignore Zero Values

Enabled chart backwall

Colour theme: Autumn

Backwall colour: White

Cancel Continue

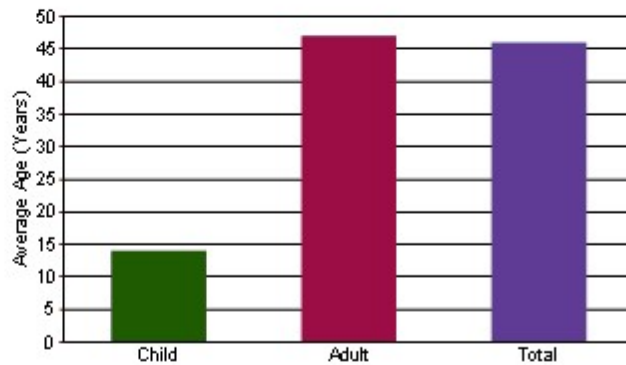
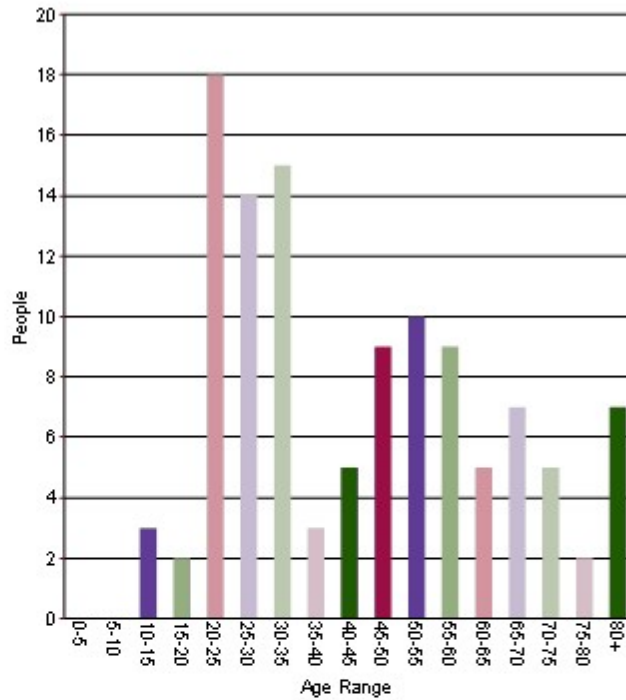
Birth Date Analysis

Age	Amount	%
0 - 5	0	0
5 - 10	0	0
10 - 15	3	2.6
15 - 20	2	1.8
20 - 25	18	15.8
25 - 30	14	12.3
30 - 35	15	13.2
35 - 40	3	2.6
40 - 45	5	4.4
45 - 50	9	7.9
50 - 55	10	8.8
55 - 60	9	7.9
60 - 65	5	4.4
65 - 70	7	6.1
70 - 75	5	4.4
75 - 80	2	1.8
80 +	7	6.1

Unknown Years = 0
 Unknown Dates = 15
 Total People Found = 129

Average Child Age = 14.0
 Average Adult Age = 46.7
 Average Age = 45.5

Adult age is determined when a person turns 18 based on today's date being 27/10/2012



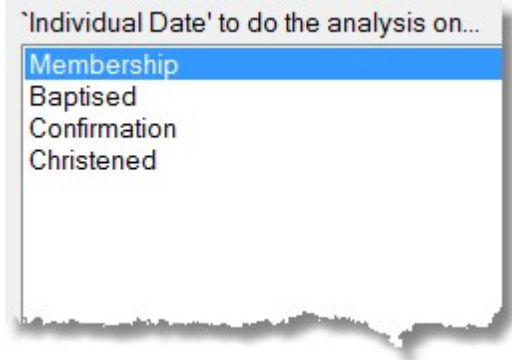
The Individual Date report gives you great demographics on the "age" spread of people in an Individual Date grouping. For Example, if Membership is selected, then the report will show how "OLD" your memberships are in Percentages and numbers of people.

In addition to using this report on the whole church, you can now use filters to find out more about selected groups of people. All the power of [Filters](#) and [Format](#) controls can be used in these reports. Even though an Individual Date report is essentially already filtered for an individual date, you can add more filters to narrow your search even further. For example, if you selected a filter of Female, and an individual date report of Membership, the analysis result would be how long had your female members been members of your church!

The Pre-Flight options for the Individual Date Analysis report are shown right.

Individual Date Selection

Select the date for running the report on.



Graph Options

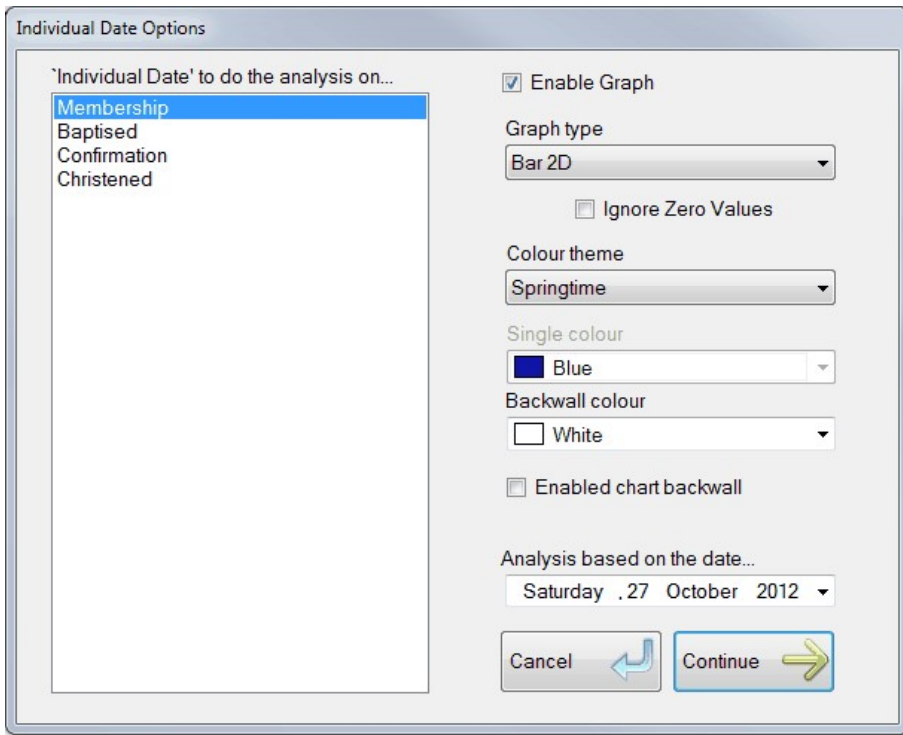
Enable Graph Tick the Enable Graph Option to turn on graphs on this report. (Recommended)

Graph Type Select the graph type for this report.

Ignore Zero Leave zero values off the chart. This will remove categories from the chart that have not got any data against them

Chart Backwall Turn on a background colour and set that colour with the Backwall Colour option

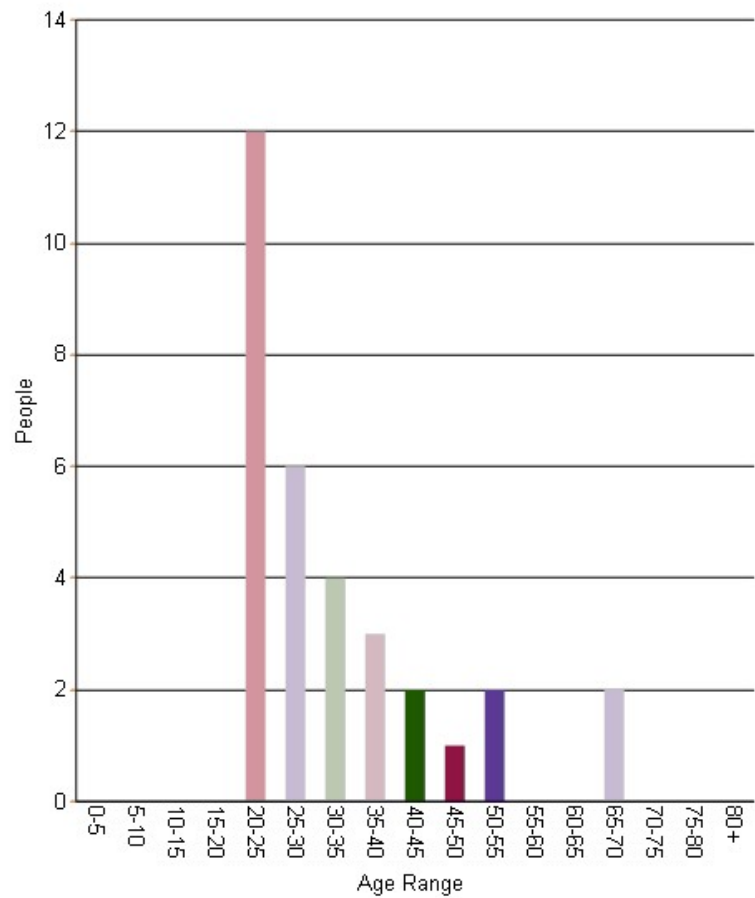
Colour Theme Set a colour them to make your graphs look really cool! Simple to use and already have a great selection of complimentary colours.



Membership (Individual Date Analysis)

Age	Amount	%
0 - 5	0	0
5 - 10	0	0
10 - 15	0	0
15 - 20	0	0
20 - 25	12	37.5
25 - 30	6	18.8
30 - 35	4	12.5
35 - 40	3	9.4
40 - 45	2	6.2
45 - 50	1	3.1
50 - 55	2	6.2
55 - 60	0	0
60 - 65	0	0
65 - 70	2	6.2
70 - 75	0	0
75 - 80	0	0
80 +	0	0

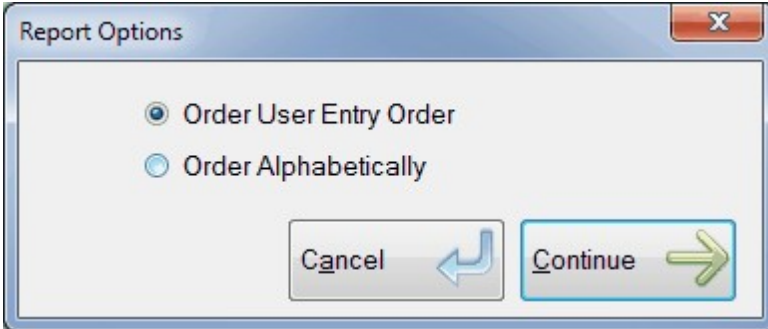
Average (years) = 33.2
 Unknown Dates = 97
 Total People Found = 129



The Occupation Report shows how many people in the various Occupations that you have defined in Pastoral Care. In addition to using this report on the whole church, you can now use filters to find out more about selected groups of people. All the power of [Filters](#) and [Format](#) controls can be used in these reports.

The Pre Flight options for the Occupation Report is shown below.

These options change the sort order on the Occupation.



Occupation Analysis			
Total People Found: 129		People with Occupation: 54 (41.9%)	
Occupation	Amount	%	Occupation
Plumber	1	0.8	
Builder	2	1.6	
Electrician	2	1.6	
Technician	0	0	
Clerical	0	0	
Salesman	0	0	
Nurse	1	0.8	
Doctor	3	2.3	
Accountant	0	0	
Retired	4	3.1	
Home Duties	13	10.1	
Design Engineer	1	0.8	
Musician	1	0.8	
Cabinet Maker	1	0.8	
Minister	2	1.6	
Gardener	2	1.6	
Secretary	1	0.8	

The FamilyDate report gives you great demographics on the "age" spread of people in a FamilyDate grouping. For Example, if Contact Date is selected, then the report will show how "OLD" your First Contacts are in Percentages and numbers of people.

In addition to using this report on the whole church, you can now use filters to find out more about selected groups of people. All the power of [Filters](#) and [Format](#) controls can be used in these reports

The Pre-Flight options for the FamilyDate Analysis report are shown right.



Family Date Selection

Select the date for running the report on.

Graph Options

Enable Graph

Tick the Enable Graph Option to turn on graphs on this report. (Recommended)

Graph Type

Select the graph type for this report.

Ignore Zero

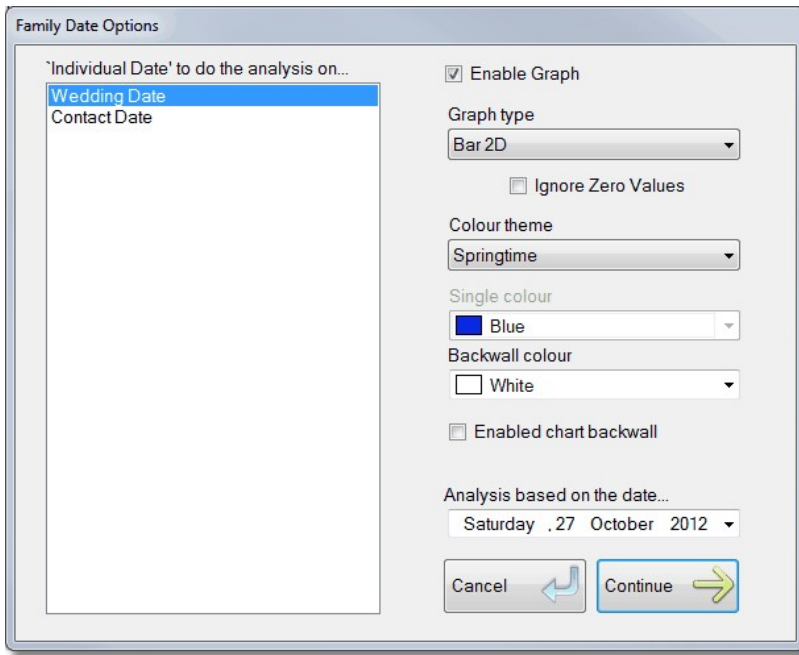
Leave zero values off the chart. This will remove categories from the chart that have not got any data against them

Chart Backwall

Turn on a background colour and set that colour with the Backwall Colour option

Colour Theme

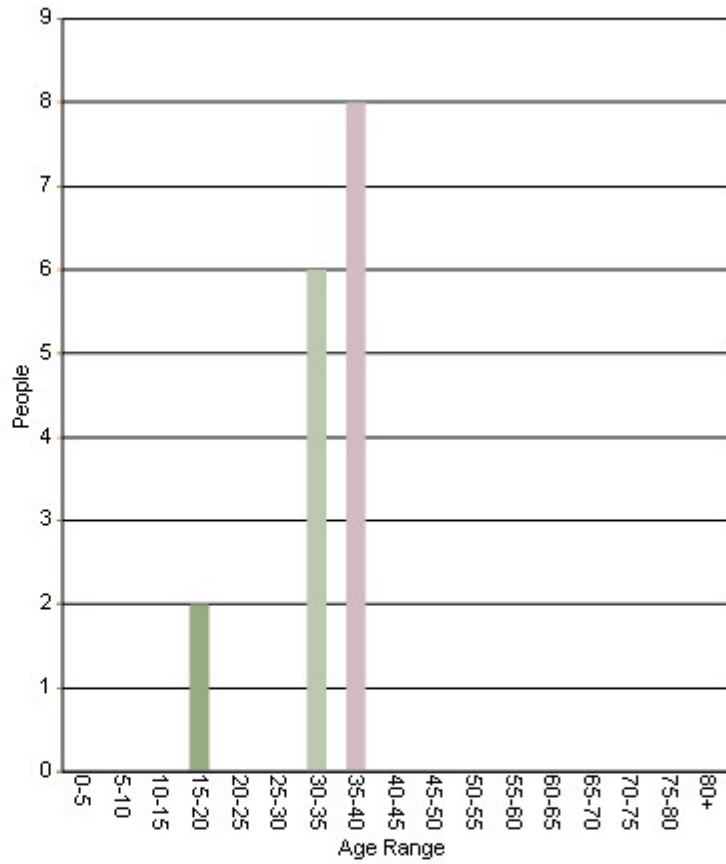
Set a colour them to make your graphs look really cool! Simple to use and already have a great selection of complimentary colours.



Contact Date (Family Date Analysis)

Age	Amount	%
0 - 5	0	0
5 - 10	0	0
10 - 15	0	0
15 - 20	2	12.5
20 - 25	0	0
25 - 30	0	0
30 - 35	6	37.5
35 - 40	8	50
40 - 45	0	0
45 - 50	0	0
50 - 55	0	0
55 - 60	0	0
60 - 65	0	0
65 - 70	0	0
70 - 75	0	0
75 - 80	0	0
80 +	0	0

Average (years) = 34.8
 Unknown Dates = 113
 Total People Found = 129



The Residential Suburb Report shows how many people in the various Residential Suburbs that you have defined in Pastoral Care. In addition to using this report on the whole church, you can now use filters to find out more about selected groups of people. All the power of [Filters](#) and [Format](#) controls can be used in these reports.

There are no Pre Flight options for this report.

Total People Found: 129		People with Suburb: 129 (100%)		
Suburb	Postcode	Amount	%	Suburb
Gisborne	3444	22	17.1	
Keilor Downs	3040	0	0	
Keilor	3190	6	4.7	
Keilor Heights	3191	23	17.8	
Melton	3091	9	7	
Riddells Creek	3412	0	0	
Sydenham	3038	0	0	
Riddells Creek	3412	17	13.2	
Sunbury	3099	31	24	
Romsey	3444	6	4.7	
Ivanhoe	3333	15	11.6	

The Postal Suburb Report shows how many people in the various Postal Suburbs that you have defined in Pastoral Care. In addition to using this report on the whole church, you can now use filters to find out more about selected groups of people. All the power of [Filters](#) and [Format](#) controls can be used in these reports.

There are no Pre Flight options for this report.

Postal Suburb Analysis				
Total People Found: 129		People with Suburb: 13 (10.1%)		
Suburb	Postcode	Amount	%	Suburb
Gisborne	3444	3	2.3	
Keilor Downs	3040	0	0	
Keilor	3190	0	0	
Keilor Heights	3191	0	0	
Melton	3091	0	0	
Riddells Creek	3412	0	0	
Sydenham	3038	0	0	
Riddells Creek	3412	0	0	
Sunbury	3099	4	3.1	
Romsey	3444	6	4.7	
Ivanhoe	3333	0	0	

Group Analysis

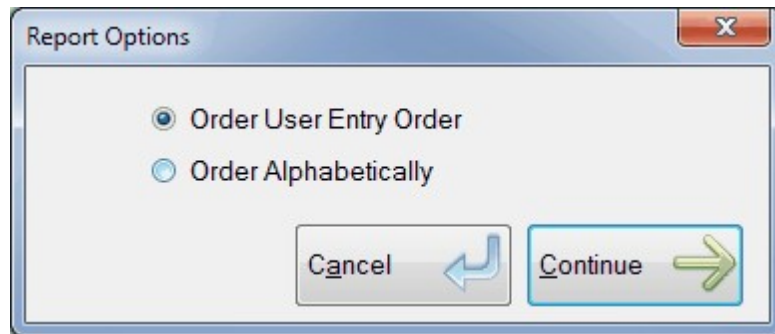
All group analysis reports are very similar in design, so we will not be showing you examples of all reports. Each report shows for it's area of interest, the number of people who participate in that group, the number of people not in those groups, and all statistics are presented as both an absolute number and a percentage of the total people on the report.

All the power of [Filters](#) and [Format](#) controls can be used on all Group Analysis reports.

Sort Order

The Pre Flight options for all Group Analysis Reports are shown below.

These options change the sort order on each of the respective groups in the reports..



Shown below is a sample Group Analysis Report that is typical of all group analysis reports.

Individual Group Analysis		
Total People Found: 129	People with Group: 99 (76.7%)	
Individual Group	Amount	%
Aerobics Outreach	34	26.4
Basket Ball Team	11	8.5
Bible Study 1	8	6.2
Bible Study 2	13	10.1
Bible Study 3	30	23.3
Bible Study 4	20	15.5
Building Maintance	15	11.6
Camp Planners	6	4.7
Catering Staff	27	20.9
Cleaning Roster	18	14
Home Casserole Team	23	17.8
Home Group 1	27	20.9
Home Group 2	14	10.9
Home Group 3	16	12.4
Ladies Home Group 1	35	27.1
Ladies Home Group 2	30	23.3
Ladies Home Group 3	25	19.4
Men's Fellowship	1	10.1

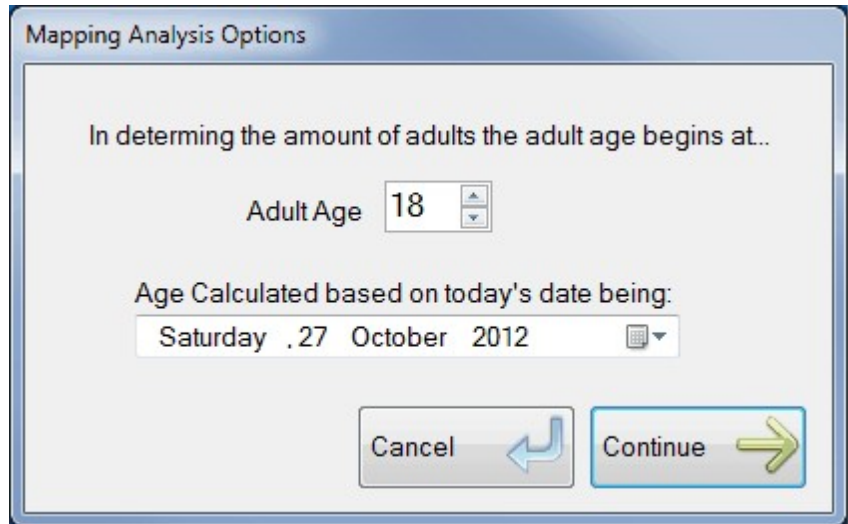
Mapping

If you have set up the Mapping Area in [Mapping Setup](#) and put Map Information against each family, then Pastoral Care can run a few Analysis Reports based on this mapping information.

Also don't forget that all the power of [Filters](#) and [Format](#) controls can be used on the Mapping Reports.

The Map Density Report shows for each map in your setup area, the number of Adults and Children living within that map number. These numbers are both the total per map, and also expressed as a percentage of the total people on the report.

The Pre Flight options for the Map Density Report simply let you set the date information required to determine if a person is a child or an adult. If a person has no Birth Date information, then they are determined to be an adult or child based on the position in the family file.



Map Denisity Analysis

Adult age is determined when a person turns 18 based on an analysis date of 27/10/2012

Total People Found: 129 People attached to a map: 92 (71.3%) People not attached to a map: 37 (28.7%)

Map #	Adult Amount	%	Child Amount	%	Map #	Adult Amount	%	Child Amount	%
11	8	6.2	1	0.8					
15	17	13.2	1	0.8					
13	7	5.4	0	0					
25	24	18.6	0	0					
12	5	3.9	0	0					
27	8	6.2	0	0					
28	4	3.1	0	0					
26	17	13.2	0	0					

The Map Distance Density Report shows for each map in your setup area, the number of Adults and Children living within a set distance from a pre-defined landmark. These numbers are both the total and also expressed as a percentage of the total people on the report.

The Pre Flight options for the Map Distance Density report are shown here.

Landmark

Set the landmark as the starting point for calculating the distance from.

Increment

Set the increment in kilometers that you want to analyse on.

Adult Age

Adult age is assumed as 18, however you can change this here if you need to.

The screenshot shows a dialog box titled "Mapping Analysis Options". It contains the following fields and controls:

- Reference Starting point..**
 - Landmark: Church (dropdown menu)
 - Map: 25 (text input)
 - Ref: A2 (text input)
 - Increment: 1 Km (text input)
- In determining the amount of adults the adult age begins at..**
 - Adult Age: 18 (spin button)
 - Age Calculated based on today's date being: Saturday, 27 October 2012 (calendar icon)
- Buttons: Cancel (with a blue arrow pointing left) and Continue (with a yellow arrow pointing right).

Map Distance Denisity Analysis

Adult age is determined when a person turns 18 based on an analysis date of 27/10/2012

Total People Found: 129 People attached to a map: 83 People not attached to a map: 46

Analysis starting point = Map: 25 Ref: A2 (Church)

	Adult	%	Child	%		Adult	%	Child	%
0 - 1 km	4	4.8	0	0	13 - 14 km	0	0	0	0
1 - 2 km	12	14.5	0	0	14 - 15 km	0	0	0	0
2 - 3 km	8	9.6	0	0	15 - 16 km	0	0	0	0
3 - 4 km	0	0	0	0	16 - 17 km	0	0	0	0
4 - 5 km	17	20.5	0	0	17 - 18 km	0	0	0	0
5 - 6 km	16	19.3	1	1.2	18 - 19 km	0	0	0	0
6 - 7 km	8	9.6	0	0	19 - 20 km	0	0	0	0
7 - 8 km	0	0	0	0	20 - 21 km	0	0	0	0
8 - 9 km	11	13.3	0	0	21 - 22 km	0	0	0	0
9 - 10 km	0	0	0	0	22 - 23 km	0	0	0	0
10 - 11 km	2	2.4	0	0	23 - 24 km	0	0	0	0
11 - 12 km	0	0	0	0	24 - 25 km	0	0	0	0
12 - 13 km	4	4.8	0	0	25km +	0	0	0	0

Longest Distance = 12.1km

Shotest Distance = 0.8km

Average Distance = 5.1km

View Saved Reports

In Pastoral Care, every report that you create is created live on the data available at that point in time. If you run the same report in a months time, it is likely lo look different.

Historical Reports

If you desire to save reports for historical references, you can simply press the Save button on the [The Report Viewer](#) toolbar to save the current report. This saves the report as a snapshot, and that snapshot cannot be edited or changed, it is essentially a point in time save of a report.

Here are a few examples of historical reports that may be useful:

- Quarterly Members List
- Annual Members List
- Church Directory for a Who's Who for each year

How to view a Saved Report

Simply press the Load Button on the [Report Viewer Toolbar](#) and select the report to view.

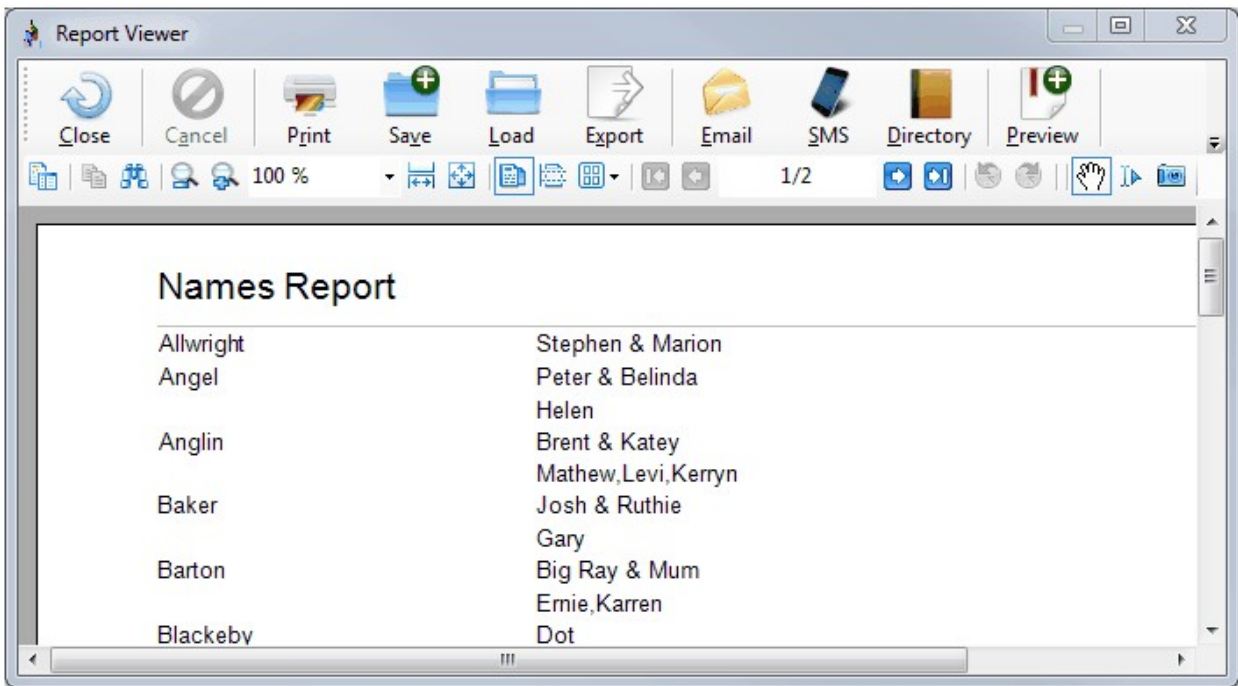


The Report Viewer

More than just a tool for viewing reports, the Pastoral Care report viewer allows you to export your reports to a number of useful formats.

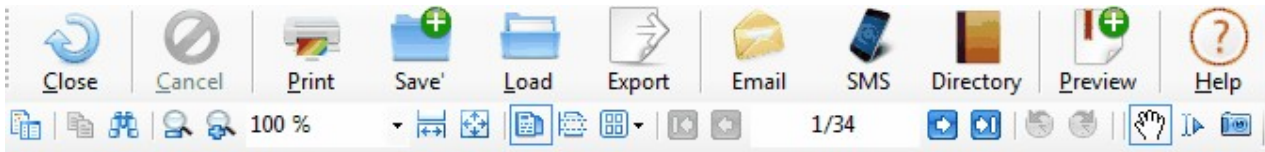
All reports created in Pastoral Care are sent to the Report Viewer, giving you an intuitive common control for all outputs. It is worthwhile remembering this as you look at this area, as every feature described here can be applied to almost every report in Pastoral Care. In some cases, you might find a button on the toolbar is disabled for a particular report. This will only occur if a feature is not available in the specific area you are currently in.

See the Report Viewer [Toolbar](#) for full details on how you can use this feature.



Toolbar

Shown below is the toolbar controls on the Report Viewer. Click on each item for more information.



Close

Close the Report Viewer and return to the previous window.

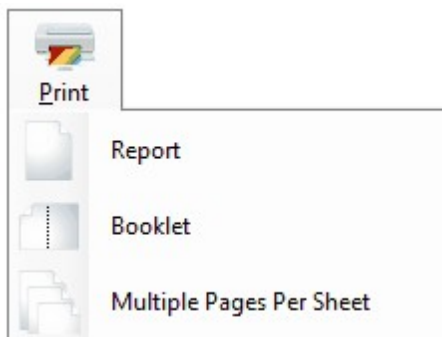


Cancel

If a large report is building in the report viewer, and you change your mind, you can press Cancel to stop the report and return to the previous window.



Print Options



Report

Press the Report Option to print the report that is currently being displayed in the report viewer.

Booklet

This new feature allows you to convert a report to a Booklet format automatically. This will work for all A4 reports that are viewable in the report viewer. This converts a normal A4 Portrait Report to a 2 x A5 report landscape correctly paginated for folding into a booklet. Some reports might work better than other reports because of the size of the fonts.

Note this option will automatically turn your printer into doubled sided printing. If your printer does not support double sided printing, a Booklet Output may not give you a usable format for use.

**Multiple Pages
Per Sheet**

This option will shrink a report so that you can have multiple pages on 1 sheet. This is not intended for booklet conversion, as this option does not do any work on the pagination for folding the report.

This option can be useful for saving paper, allowing you to review a document in smaller print to save paper, before producing a final report.

Save

Save a report that is on the screen for viewing later. The information on the report is saved as a snapshot and will not be updated when the saved report is opened again from the report viewer.



On the Explore Tab on the main menu, you can select the View Saved Reports option for viewing reports that you have saved.

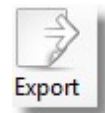
Load

Load in a selected Saved Report for viewing or printing.



Export

Press the Export button to open the Export Window. From there you can choose any one of a number of of formats for exporting to. (See list below)



PDF Export

This export is the best format for sharing information with others. An Adobe PDF document is produced that can be opened on most computers and many portable tablets and phones, as long as the Adobe Reader is installed on them

HTML Export

Export the report as a HTML file that can be included on a web site or an intranet. Before you get all excited about publishing to the internet, make certain you have covered issues like Privacy, Permission and Security of data stored!

Excel Export (95)

Export the report as an Excel file suitable for opening in Excel 95 version.

Excel Export (97)

Export the report as an Excel file suitable for opening in Excel 97 version.

Excel Export (2007)

Export the report as an Excel file suitable for opening in Excel 2007 version.

RTF Export

RTF stands for Rich Text Formatting. This type of report can be opened by work processors, however some graphics are not included in the report such as lines. Portrait information usually converts across ok.

Depending on the complexity of the report you are converting, Text

Positioning Issues can occur. For best export output, use the PDF export.

Text Export

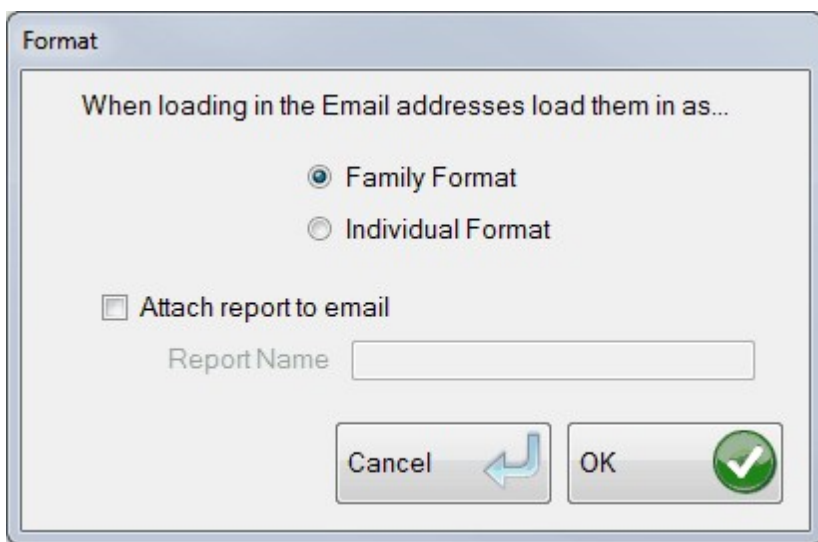
Export the report information to a plain text file.

TIFF Export

Export the report to a TIFF file. TIFF export are pictures, and these do not take any colour images across. All colour images are converted to Black and White.

Email

When you press this option, the following control screen opens up. After pressing OK on this screen, Pastoral Care will save all requested email addresses and the report if requested ready for use in the email management area of Pastoral Care. Pastoral Care will then automatically open the email program with the people already loaded and tagged, and any report attached ready for you to compose your email and press send!

A dialog box titled "Format" with a light blue header. The main area contains the text "When loading in the Email addresses load them in as...". Below this are two radio buttons: "Family Format" (selected) and "Individual Format". There is a checkbox labeled "Attach report to email" which is currently unchecked. Below the checkbox is a text input field labeled "Report Name". At the bottom are two buttons: "Cancel" with a blue arrow icon pointing left, and "OK" with a green checkmark icon.

SMS

When you press this option, the following control screen opens up. After pressing OK on this screen, Pastoral Care will save all requested SMS Mobile Phone Numbers and the report if requested ready for use in the SMS management area of Pastoral Care. Pastoral Care will then automatically open the SMS program with the people already loaded and tagged ready for you to compose your text message and press send!

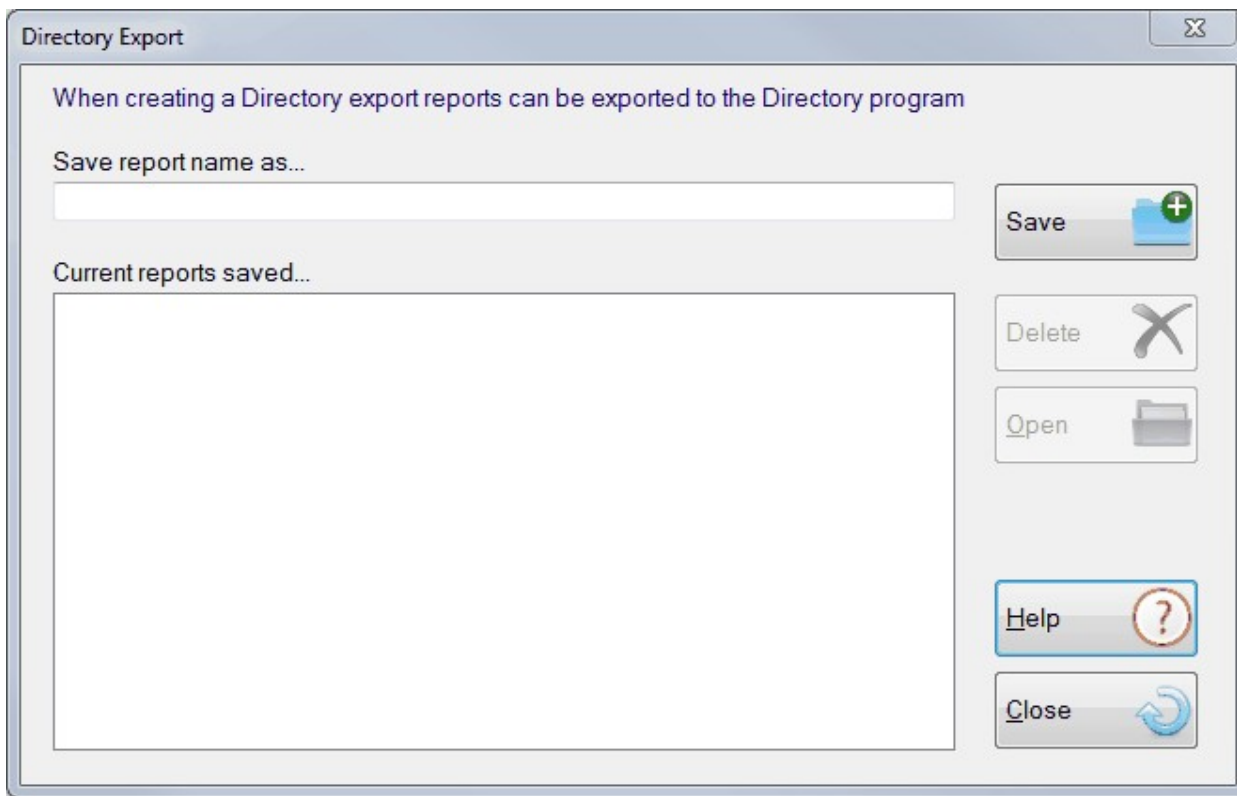
A dialog box titled "Format" with a light blue header. The main area contains the text "When loading in the SMS phone numbers load them in as...". Below this are two radio buttons: "Family Format" (selected) and "Individual Format". At the bottom are two buttons: "Cancel" with a blue arrow icon pointing left, and "OK" with a green checkmark icon.

Directory

Press this option open the Directory Export Window (shown below) When a report is exported for use with the Directory Program, this packages up the report ready to be transferred to people using the Directory Program. See also [Pastoral Care Directory](#) for more information on the Directory Program.



Click on each part of the window below to learn more.



Save Report Name As

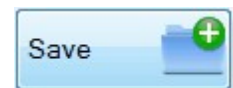
Enter a name to save the report as for distribution to the Directory Program.

Current Saved Reports

This shows the current list of directory reports saved for sending to users of the Directory Program.

Save

Press Save to Save the current report into the list of reports for exporting to the Directory Program.



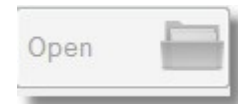
Delete

Press the Delete Button to delete the selected report from distribution to the Report Program.



Open

Open the selected report.



Preview

In Pastoral Care, every report can have a Preview image that is displayed on the report window when that report is selected. This includes all of your custom reports and custom letters etc.

Press the Preview Button to set the current report (page 1) to be the report preview.



Navigation

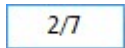
The Navigation Toolbar allows you to jump around the various pages of the currently displayed report.



Jump to the first page of the current report



Navigate back one page on the current report



See the number of pages in the report, and what page you are on. You can type a page number in here to and press enter to jump to that page.



Navigate forward one page on the current report



Jump to the last page of the current report



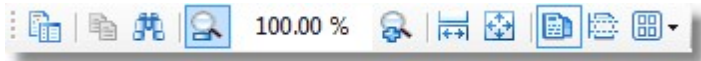
Go backwards



Go forwards

Page

The Page Toolbar allows you to manipulate the page views of the currently displayed report.



Toggle the Sidebar View Manager on and off. The sidebar shows thumbnail size views of each page for navigating around.



Copy selected text to the clipboard.



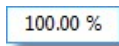
Find text in the report



Zoom Out



Zoom In



View the current zoom factor, or enter a zoom factor and press enter to set a manual zoom level.



Zoom the current report to fit the width of the page in the current window size.



Zoom the current report to fit the report page in the whole window size.



Switch to Single Page View (Default View)



Switch to continuous page view, allowing you to scroll through all pages with the scroll bar.



Set Multi Page view, multiple pages visible in one window.

Selection Controls

The Selection Controls Toolbar allows you to move the page around the screen, and select text on the screen.



Pan Mode. The hand lets you "hold" a page in the viewer and push it around the viewer for seeing different areas that are not zoomed onto the current view.



Selection Mode. Click and drag to highlight text and graphics. Or Just Click on a word or a picture to select it. Pressing Copy on the toolbar, or pressing Control - C on your keyboard will copy the selected items to the clipboard.



Use the Camera Icon to take a picture of a part of the report. Simply Click and Drag the mouse over the area you want to copy to the clipboard.

SMS Manager

The Pastoral Care SMS manager is the main area you can use for sending SMS messages to people on your database. We have done all the hard work for you in setting up the SMS manager, including selecting an Australian / New Zealand SMS provider with great service, backup support and competitive pricing.

In Australia, a typical SMS message from your mobile phone costs 25 cents. Pastoral Care, in conjunction with SMS Global are able to offer you 8 cent Cent texts. All you need to do is to create an account from Pastoral Care with SMS Global, purchase some credit's and you are ready to go!

Cost Guarantee

Pastoral Care cannot fix the price of the SMS message credit's. This is in control by SMS Global. Full pricing and information on SMS global's offering can be found at www.smsglobal.com.au

At the time of publication, SMS Global's account details and pricing was:

- Messages are 8 cents each in Australia
- Credit's are purchased in advance for use
- Credit's NEVER expire
- No Lock In contracts
- No monthly or yearly maintenance fees

Advantage To using SMS

- Most people own mobile phones
- SMS Messages are instant
- People have access to messages more readily than emails
- Preferred method of contact with younger people
- Can be scheduled to be sent at a specific date / time

Before Using SMS

You will need to create an account using the [SMS Configuration](#) area for SMS. This is found from the main menu, click on the Settings Tab, then Global, then [SMS Configuration](#). There is a Create Account button there that will start the process off. It is important to do this step first before attempting to use SMS or this feature will not work.

Privacy

Please be aware that some people treat SMS messages like Email Messages! IE: If an unsolicited SMS message arrives, it can be seen as unwanted, or SPAM. You might want to ask people permission to send the SMS messages, and use a Status of SMS_OK to filter for people who have agreed to receive SMS messages. See [Using Pastoral Care to Communicate](#) for more information on SPAM.

Why SMS Global?

We did extensive research into the many different companies and options open to us for SMS messaging. The reasons we have selected SMS Global are:

- Australian Provider
- Excellent technical support and service
- Fast Gateway (Average of 3.1 seconds to send a text)
- Great Features – SMS to Voice & SMS to FAX for Australian Land Lines
- NO LOCK IN CONTRACTS!
- Free 25 text messages to get you started
- Credit's pre purchased for text messages NEVER EXPIRE!

Note: Information published here is accurate at the time of publishing and is subject to change without notice.

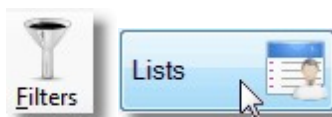
How To Send a Text Message

Here are the basic steps to produce and send an SMS message.

1. Open the SMS manager from the Explore Tab.



1. Choose your group to send to using Filters or Lists. See [Filters](#), [SMS Lists](#)



1. Or, instead of using Filters and Lists, press Load and manually tick people you want to send messages to.



1. Compose your SMS message. See [Compose SMS Message](#)



1. Send your SMS Message. See [Send](#)



SMS Manager Window

Shown below is the SMS Manager Window. See also [SMS Manager](#) and [How To Send a Text Message](#) for more information on managing SMS messages.

See also [SMS Manager](#) for a general overview of this program.

Important Information

The SMS Manager is not a networked feature in that if you are running Pastoral Care on a network, the SMS messages are created only on the computer that the messages were written on! This is on purpose to save confusion with other users on the network.



Click on each area to learn more.

Order to find phone numbers

- Family Mobile
- Personal Mobile
- Family Phone
- Family Fax
- Business Phone
- Business Fax
- Allow hidden phone numbers
- Allow 'Other Surname'

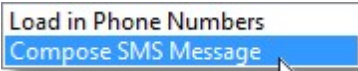
Family Format: Family Format, Individual Format

Show People with 'No Phone Number':

Tagged Total = 31

Send	Type	Family	Phone Number
<input checked="" type="checkbox"/>	Personal Mobile	Allwright Family	041234567890
<input checked="" type="checkbox"/>	Personal Mobile	Angel Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Anglin Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Barton Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Blackeby Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Blackeby Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Brown Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Chapman Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Collins Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Dimsey Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Dobber Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Eadon Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Edwards Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Flemming Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	French Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Gordan Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Graham Family	041234567890
<input checked="" type="checkbox"/>	Personal Mobile	Gray Family	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Harris Family	041234567890

Compose SMS Message



Selecting the Compose SMS Message option lets you type your SMS message for sending and also set the Schedule for when you want to send the SMS message.



Click on each part of the Compose SMS window below to learn more about this area.

File Help

Close Load in Phone Numbers Compose SMS Message Send Load Filters BirthDate Tracking Queue Archive Test History ToolBox Help

Given Surname Clear Spell Save Retrieve Est. Characters: 145 Est. Txt 1

Hi [Given], just a quick note to remind you of the upcoming AGM at the Youth Hall, Friday 15 Aug. Please arrive no later than 7pm. Regards Allan.

Smsglobal Status
Connection Established

Return ID
[Empty text box]

Scheduling
 Enable SMS Scheduling
08:13 AM
Saturday , 10 November 2012
Daylight Saving

Account Details
Credit Available : \$39.12
Txt's Available : 489
Estimate Cost : \$0.08
Access Account

Current Message

	Tagged	Txt's to Send	Cost
People :	106	106	\$8.48
Tracking :	0	0	\$0.00
Total :	106	106	\$8.48

Toolbar



Insert the Given Name of the recipient in the message. This is ideal for personalising each message.



Insert the Surname of the recipient in the message. This is ideal for personalising each message.



Erase the currently composed message.



Access the Spell Checker Settings



Save the current message as a template for re-use.



Load in a Saved message so you can send it again.

Est. Characters:	145
Est. Txt	1

The Estimated Characters and Estimated Number of Texts shows approximately how many 160 character messages are used in the currently composed message. It is an estimate only if you have used a Given Name or a Surname object. If you have not used either of these objects, then the actual text message size is shown here.

Writing your message

When composing your message, you should be aware of the following:

- Be wary of using too many short words like LOL etc. Depending on your audience, some might not understand these or mis-understand the message
- When using Given Name and Surname objects, because names can be of a large range of varying lengths, some of the single text messages you think you are sending may be 2 messages in length costing you more to send

SMS Global Status

This area shows you the status of the connection to SMS Global. Connection Established means that Pastoral Care is able to send SMS messages. If you get any errors here, you may need to check your settings in the [SMS Configuration](#) area, or login to your account at www.smsglobal.com and check that everything is setup as needed there.

Scheduling

When to tick the Scheduling option, all SMS messages tagged for sending in the current session will be sent at the scheduled time.

How Does Scheduling Work?

It is important to note that Pastoral Care does not handle the scheduling of the SMS messages in that you do not need to leave your computer on to send messages at the allocated date and time. Once the SMS messages have been sent to the SMS Queue, and subsequently dispatched to SMS Global for delivery to the the actual phone, the messages sit at SMS Global until the allocated date and time, and then if there is enough credit in your account to send the messages, they will be delivered.

Time Zones

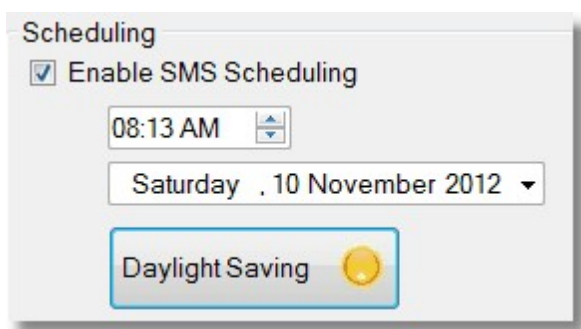
If you are sending all messages to people in the same time zone, then the date and time shown in the Scheduling area is the date and time the message will be sent. If some people are not in your current time zone, please have consideration for when the message might arrive!

Daylight Saving

Press the Daylight Saving button to confirm Melbourne Time as the SMS Servers used to send the message all run on Melbourne Time. The time on the Daylight Saving window should be the same time as Melbourne Time (Australian Eastern Standard Time). Remember that the TIME set in scheduling is your local time set on your computer in your time zone!

Payment for Scheduled Messages

After Scheduling some SMS messages, you are committed to these being sent. Once the message have left the [SMS Queue](#) and have arrived at SMS Global, they will be dispatched at the allocated date and time. At the time of sending, you must have enough account funds to cover the messages being sent, or they will fail.



Current Message

This area shows the number of people tagged to receive the composed message, and the cost estimates based on your account setup and cost per SMS you have entered in the [SMS Configuration](#) area.

Current Message			
	Tagged	Txt's to Send	Cost
People :	106	106	\$8.48
Tracking :	0	0	\$0.00
Total :	106	106	\$8.48

Account Details

This area shows you the current SMS Global account balance and how many SMS messages you can send on your current balance. Press the Access Account button to load the SMS Global web site in a web browser.

Account Details	
Credit Available :	\$39.12
Txt's Available :	489
Cost :	\$0.08

Access Account 

Load In Phone Numbers

The Load In Phone Numbers Menu List item puts the SMS Manager in a mode for selecting people and their phone numbers to send a message to.

There are 2 paths for selecting people to send an SMS message to. Using [Filters](#) to select from groups of people and pressing the Load Button on the Toolbar, or using [SMS Lists](#).

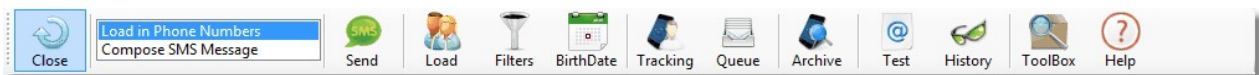
See also [Phone Number Priority](#) for information on how Pastoral Care selects phone numbers for messaging to, and how you can control this to suit your own needs.

Toolbar

The SMS Toolbar contains all the main controls for creating and sending SMS messages.

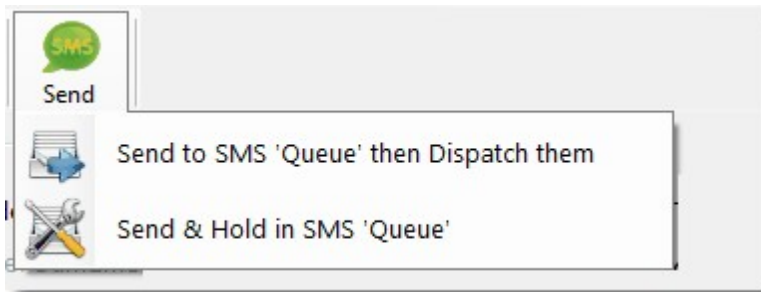


Click on each part of the toolbar below to learn more.



Send

When you press the Send Icon on the toolbar, the following options open up for you to select.

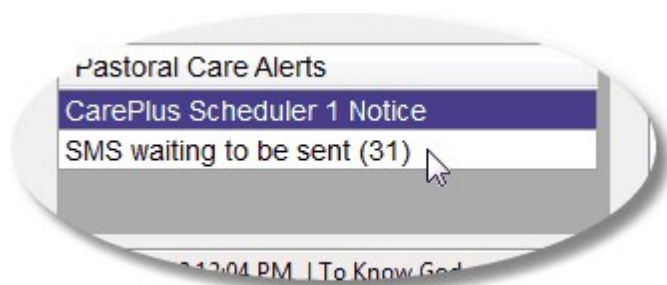


Send to Queue and Dispatch

This option sends the SMS messages immediately. In either case, all SMS messages must go via the new Pastoral Care [SMS Queue](#) program. This program handles SMS messages and allows control / use of Pastoral Care it'self to remain with the user while messages are being sent.

Send and Hold in SMS Queue

This option sends SMS messages to the [SMS Queue](#) program, and holds the messages to be sent later. If you send using this method, Pastoral Care will place a reminder on the main menu that SMS messages are ready to be sent.



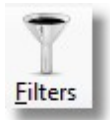
Load

Select Load to load people into the SMS manager for selection to send messages to.



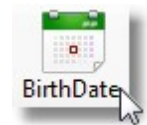
Filters

Use the standard [Filters](#) in Pastoral Care for selecting groups of people to [Load](#) into the SMS manager. See also [SMS Lists](#) for another method for keeping groups of people together for messaging to!



Birthdate

How cool would it be for everyone in your church to automatically receive a Happy Birthday SMS on their birthday! As long as you have birthdate information saved in the family file, you can schedule an encouraging Birthday Greeting to church members. After clicking on Birthdate on the SMS Manager toolbar, the following window is displayed.



Important Information

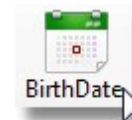
After you schedule a Birthday Greetings, the money for that greeting is not spent yet. It will be consumed when and only when the text message is delivered. Also, once a message has been scheduled, it is committed at SMS Global to be sent. ***Pastoral Care is no longer in control of that message.***

How To Schedule a Birthday Greeting

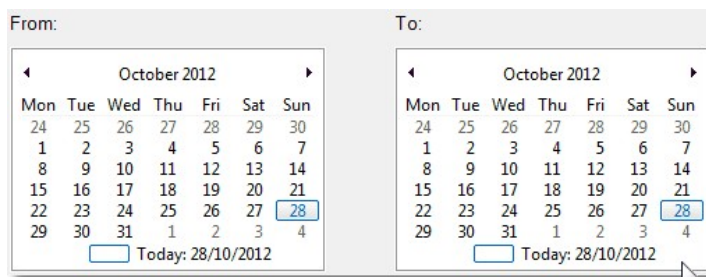
Open the SMS manager from the Explore Tab.



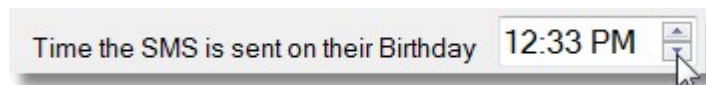
Click on Birthdate on the SMS Toolbar



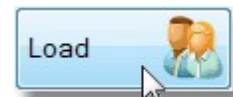
Select a From and To date range to find all people who are having a birthday between those dates.



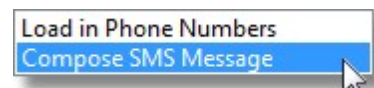
Set the time that you want to send the message on each person's birthday.



Press Load on the Birthdate Screen to load all people with the schedules set for each person.



Compose your birthday greeting (keep it generic for all people), and use the Given Name object for personalising the message



Press Send to send the messages off to SMS global for delivery at the prescribed dates and time.



[See also Birthdate](#) for more information on this feature.

The Birthdate Window



Click on each part of the Birthdate Window to learn more about this feature.

See also [How To Schedule a Birthday Greeting and Birthdate](#) for more information.

SMS Birthdate Load

People who have a mobile phone and their birthdate falls in the date range will be loaded.

Caution: Messages that are scheduled to be sent in the future will NOT be charged to your account UNTIL they are sent. Please keep your account in sufficient credit to cover future SMS messages to be sent.

From:

December 2012						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today: 28/10/2012

To:

December 2012						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today: 28/10/2012

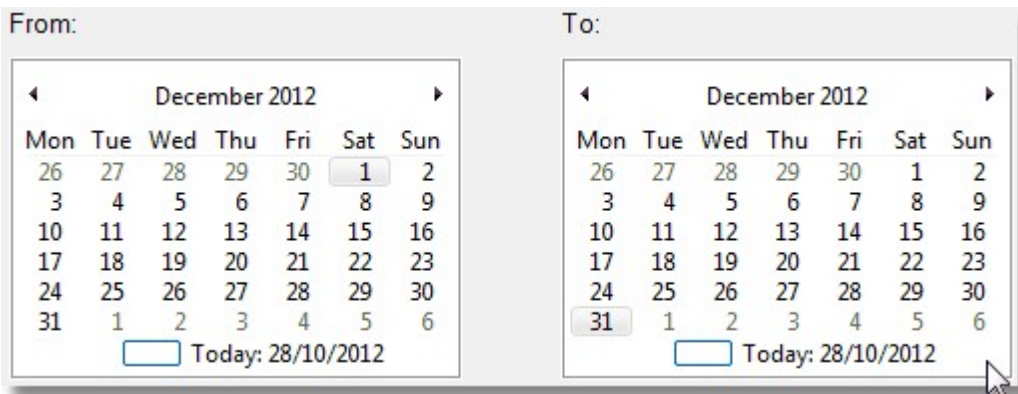
Time the SMS is sent on their Birthday 12:51 PM

Do not load people who have already received a birthday SMS in the year 2012

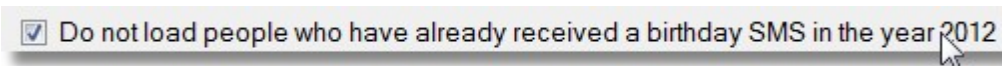
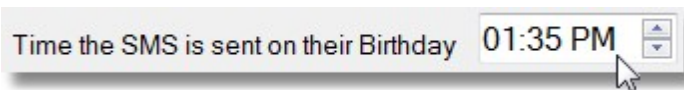
Enable Age Filter 1 To 18 Years

Help ?
Cancel ↩
Load 👤

Set the Date Range to gather all people having a birthday in between the From and To dates selected



Set a reasonable time for the Birthday Greeting to arrive. Not so early that you wake people up, and not so late that people think you might have forgotten!

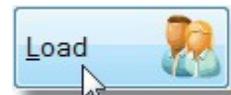


This option is best left Ticked On. It will ensure that people do not receive more than 1 greeting in each year.



If you want to send a special greeting to people turning 18, or 21 etc, use the Enable Age Filter to only load people with a birthday in the date range you have set and only who are within the Age Filter set.

After setting the Birthdate options, press Load to gather all people who are having a birthday within the selected date range etc.



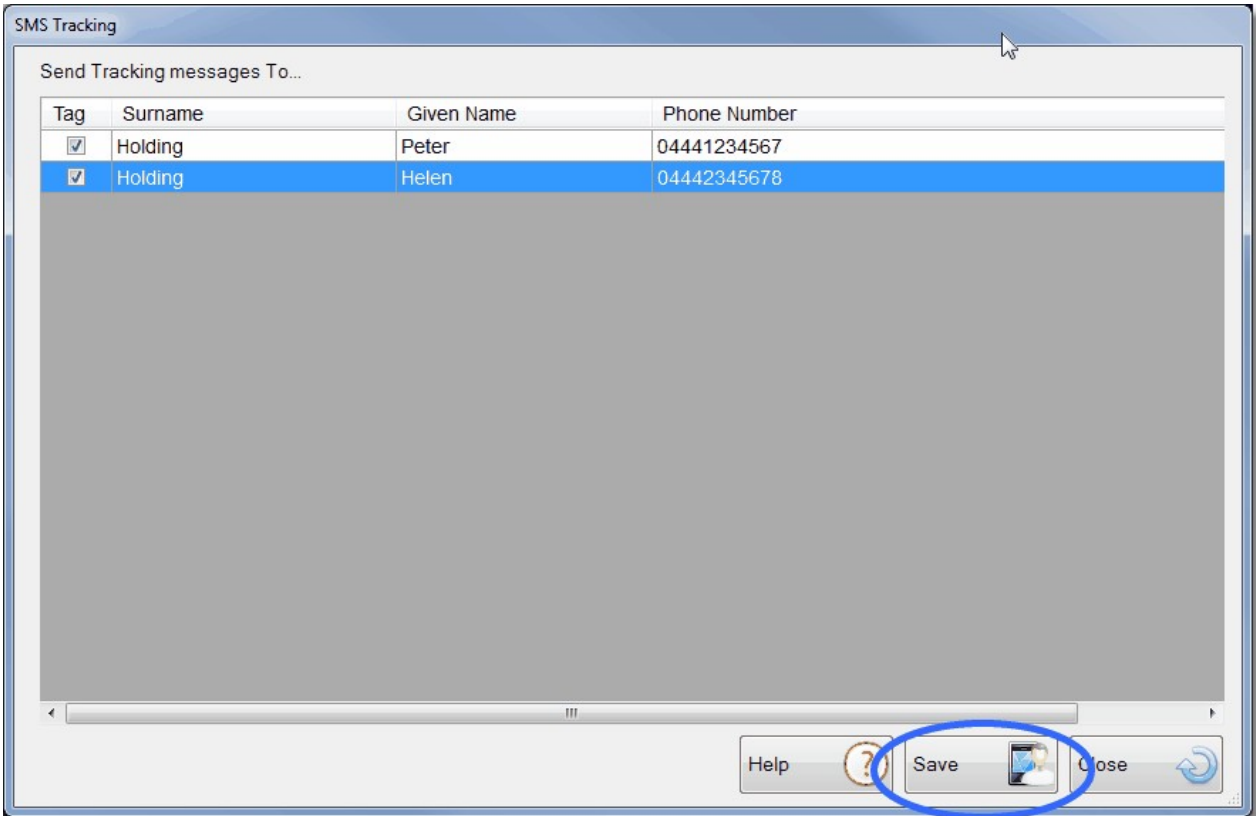
Tracking

Tracking allows you to enable a blind CC of the messages sent from Pastoral Care. See [SMS Tracking](#) in the Setup area of Pastoral Care for information on setting up Tracking Mobile Numbers. IN the SMS Manager, press Tracking on the toolbar, and tag the people that you want to receive a copy of the messages being sent.



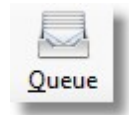
Save Settings

Pressing Save on the bottom of the Tracking Window sets Pastoral Care to save the ticked names here so they are automatically used next time you use SMS messaging.



SMS Queue

The SMS Queue area is in fact a new program that is automatically controlled from Pastoral Care itself. It takes SMS messages off Pastoral Care, and sends them on either later (manually) or immediately (automatically).



To open the SMS Queue, simply select the SMS Queue Icon from the SMS Manager. The Following window opens up. We have shown the SMS queue with some messages ready to send, that have not yet been sent.



Click on each part of the SMS Queue below to learn more.

Send	Status	Created	Cost	From	To	Scheduled	Message
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Allwright Stephen	03/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Angel Belinda	04/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Angel Peter	02/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Brent	12/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Katey	04/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Kerryn	04/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Levi	03/08/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Mathew	12/03/2012 (12:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Barton Ernie	03/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Barton Mum	04/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Barton Karren	05/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Barton Big Ray	04/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Blackeby Dot	04/08/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Blackeby Frank	03/04/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Blackeby Heather	04/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Blackeby Helen	01/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Brown Heather	20/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Brown John	01/12/2012 (12:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Brown Joshua	14/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Brown Peter	11/08/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Chapman Adrien	05/08/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Chapman Hannah	01/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Chapman Ruth	04/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Collins Fred	05/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Collins Jill	03/02/2012 (12:43 PM)	hello

SMS Queue Toolbar



Press the Send Icon when you are ready to send all messages in the Queue. Messages will ONLY be sent if they have a status of **Ready**, and if the Send box is ticked against each message.

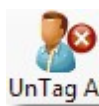
No cost has yet occurred to the church until the Send button has been pressed, unless you sent your



Refresh the Queue list. This is useful if you have deleted some messages, and the status has changed to Deleted. Pressing Reload will remove all the deleted messages from the queue.



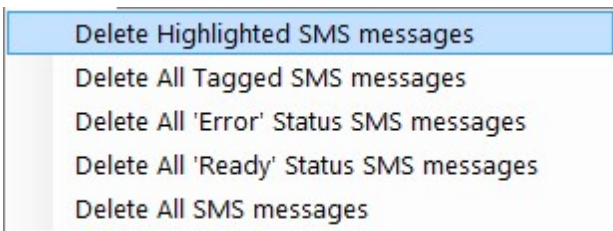
Tag all messages ready for sending.



Un Tag all messages to stop them being sent



Delete messages from the queue The following options exist for deleting SMS messages in the queue.



If you double click on a message that is sitting in the queue, you can edit the phone number for that single message to go to, and also edit / change that single message. Pressing the Edit button loads the same edit window for the currently highlighted message. See [SMS Queue Edit](#)



If an SMS message has had it's status changed from Ready to something else, like Error, you can select that message and press the Ready button on the toolbar to reset that message for sending again.



Press the Log button to view a log of SMS messages sent. The Log keeps a record of every individual text message sent, and can be useful for troubleshooting if any problems pop up.

SMS Message List

This is the list of SMS messages ready for sending. if you double click on a message in this list, you can [Edit](#) the message before it is sent!

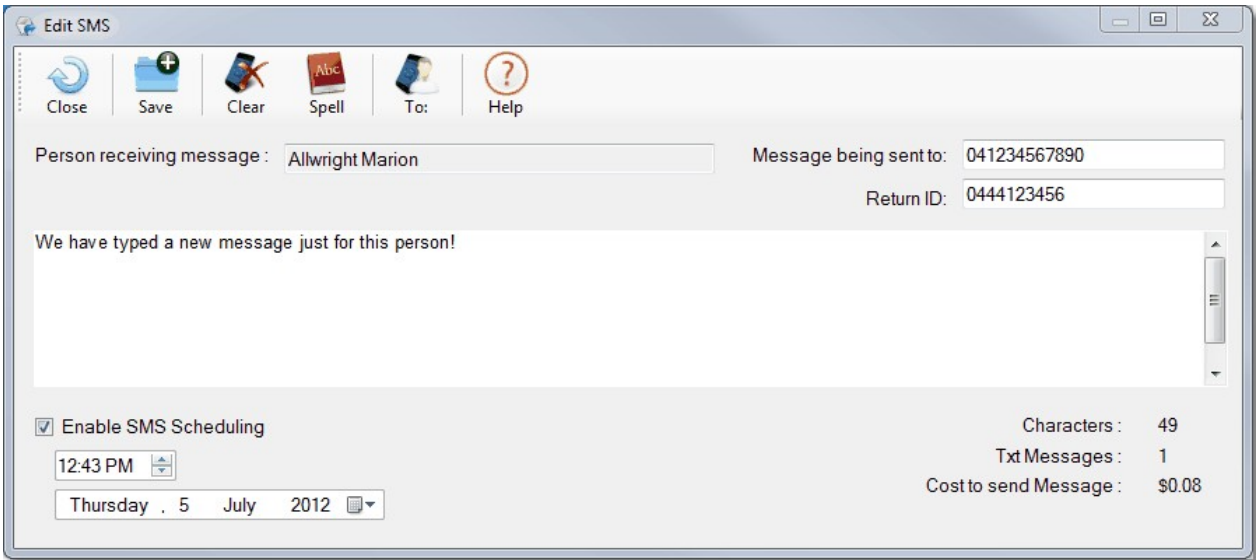
Send	Status	Created	Cost	From	To	Scheduled	Message
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Allwright Marion	05/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Allwright Stephen	03/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Angel Belinda	04/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Angel Peter	02/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Brent	12/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Katey	04/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Kerryn	04/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Levi	03/08/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Anglin Mathew	12/03/2012 (12:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Barton Ernie	03/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Barton Mum	04/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Barton Karren	05/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Barton Big Ray	04/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Blackeby Dot	04/08/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Blackeby Frank	03/04/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Blackeby Heather	04/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Blackeby Helen	01/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Brown Heather	20/07/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Brown John	01/12/2012 (12:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Brown Joshua	14/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Brown Peter	11/08/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Chapman Adrien	05/08/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Chapman Hannah	01/05/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Chapman Ruth	04/06/2012 (1:43 PM)	hello
<input checked="" type="checkbox"/>	Ready	28/10/2012	\$0.08	0444123456	Collins Fred	05/07/2012 (1:43 PM)	hello

SMS Queue Edit

The Window below shows you an SMS message in Edit Mode. This can be loaded from the SMS Queue by double clicking on a message in the queue or selecting an SMS message in the queue, and pressing the Edit button on the SMS Queue Toolbar.



Click on each part of the window to learn more about editing an SMS message in the queue.



Save

Save any changes made to the message. Press Close to return to the SMS Queue program.



Clear

Clear the SMS message ready to type a new message for the current person.



Spell

Access the Spell Checker Settings



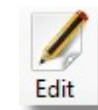
To

Change the person you are sending this message to.



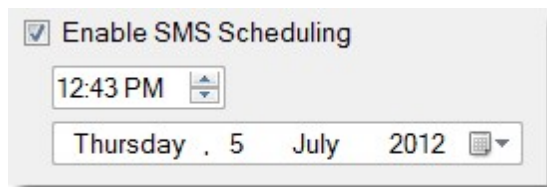
Edit Message Content

Edit the currently selected text message.



Edit Schedule

Make a change to a schedule, or add a schedule for the selected text message.

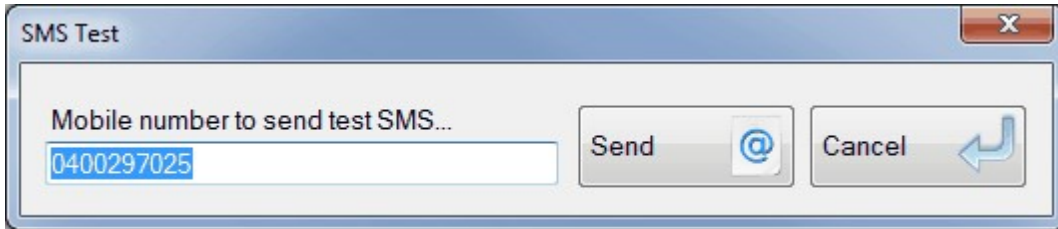


Archive

The SMS archive keeps a record of both what SMS messages were sent, and to whom the messages were sent to.

Test

Press the Test Button to manually send a single test message to one phone number. You will need to enter the test message in the Compose area of the SMS manager so there is something to send!



History

History records the last 200 messages sent in the SMS area. This includes access to the LOG file that contains more detailed information useful for troubleshooting SMS problems, however having problems with your SMS is rare!



Phone Number Priority

Priority

Use the tick options and Sort Buttons to set the priority for Pastoral Care to search for phone numbers for sending messages to.

Order to find phone numbers

<input checked="" type="checkbox"/> Family Mobile <input checked="" type="checkbox"/> Personal Mobile <input type="checkbox"/> Family Phone <input type="checkbox"/> Family Fax <input type="checkbox"/> Business Phone <input type="checkbox"/> Business Fax	<input type="checkbox"/> Allow hidden phone numbers <input type="checkbox"/> Allow 'Other Surname' <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Down"/> ↓ <input type="button" value="Up"/> ↑ </div>
--	--

Hidden Phone Numbers

Tick this option to allow Pastoral Care to use phone numbers that have been marked as hidden in the family file.

Allow Other Surname

In Individual mode, you can select the option to allow the "Other Surname" field when doing inserting of surnames in the text message.

Family / Individual Format

Choose Family Format for sending an SMS to a family

Choose Individual Format for sending an SMS to individuals.

You can also tick the option to shown people with no phone number. This is not recommended as naturally you will not be able to send them a text message!

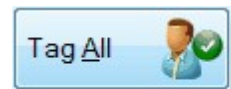
Family Format

Individual Format

Show People with 'No Phone Number'

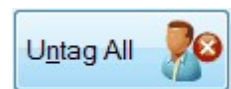
Tag All

Press the Tag All button to tag all people in the [Phone List](#) to receive a message.



Untag All

Un Tag all people in the [Phone List](#)



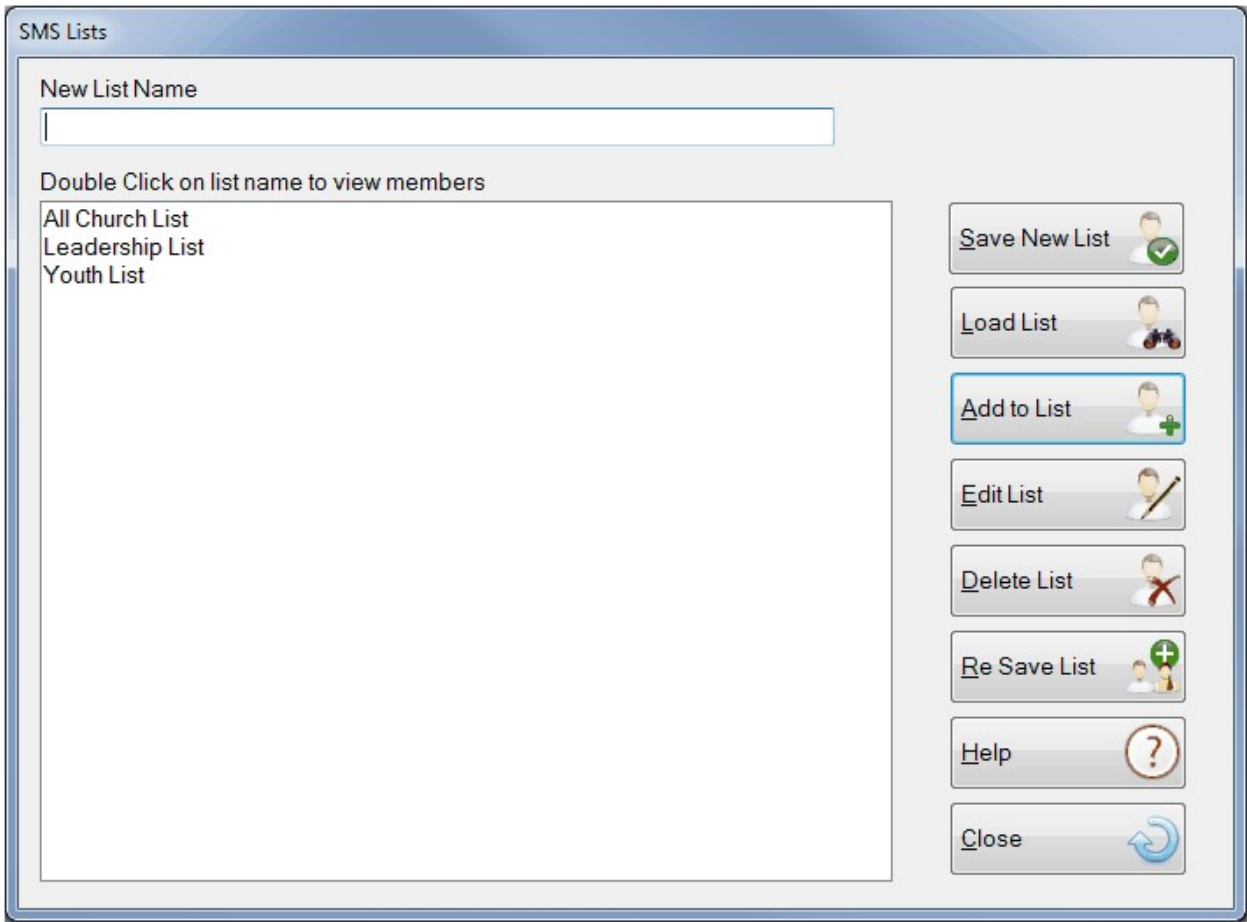
SMS Lists

The SMS lists feature of Pastoral Care lets you manage lists of people you want to regularly send SMS messages to.

See also [Using Pastoral Care to Communicate](#) for information on Spam and messaging etiquette.



The SMS Lists window is shown below. Click on each part of this window to learn more.



New List Name

New List Name

Enter a new name for an SMS list here. Press the [Save New List](#) button to save all currently loaded and ticked people to this new list name.

Phone List to send to

This is the loaded people you are about to send a message to. All people with a tick in the Send column are those that will receive a text message.

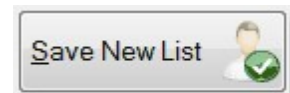
Current Lists

Shown below is the list of current SMS Lists. If you double click on a list, you will be able to see all people on that list.

- All Church List
- Leadership List
- Sample
- Youth List

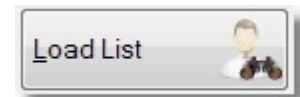
Save New List

To save a new list, simply have all the people you want in the list already loaded and ticked in the SMS Manager, enter a [New List Name](#) and press the Save New List button.



Load List

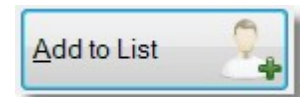
Load all people from the selected list into the SMS Manager. Note, any people loaded already into the SMS Manager will be removed the SMS Manager when the list is loaded. ie: Only those people on the list will be left in the SMS Manager for sending a message to.



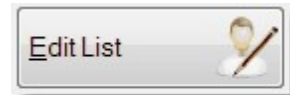
Add to List

To Add people to a list follow this procedure.

1. Load people into the SMS Manager that you want to add to an existing list
2. Make sure they are all tagged for a Send (this is default after loading in people)
3. Press the Lists button
4. Select the list to add people to
5. Press the Add to List button (shown above)



Edit List



Shown here is the SMS Edit List window. Click on each part of this window for more information on how to edit a list.

SMS List Edit

Remove	Name	Search Type
<input type="checkbox"/>	Allwright Marion	Automatic
<input type="checkbox"/>	Angel Peter	Automatic
<input type="checkbox"/>	Angel Belinda	Automatic
<input type="checkbox"/>	Anglin Brent	Automatic
<input checked="" type="checkbox"/>	Anglin Mathew	Personal Phone (Mathew Personal Phone)
<input type="checkbox"/>	Barton Mum	Automatic
<input type="checkbox"/>	Barton Ernie	Automatic
<input type="checkbox"/>	Blackeby Dot	Automatic
<input type="checkbox"/>	Brown Joshua	Automatic
<input type="checkbox"/>	Chapman Adrien	Automatic
<input type="checkbox"/>	Chapman Ruth	Automatic
<input type="checkbox"/>	Collins Stephen	Automatic
<input type="checkbox"/>	Dimsey Lorraine	Automatic

Method to find phone numbers

Automatic Fixed

Working with: Anglin Mathew

Available phone numbers

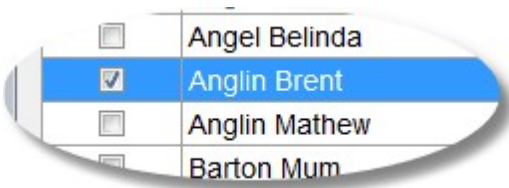
- Mathew (Personal Mobile 041234567890)
- Family Mobile (041234567890)
- Family Phone (03-273214)

Other family members phone numbers

- Brent (Personal Mobile 041234567890)
- Brent (Business Phone 03-273214)
- Katey (Personal Mobile 041234567890)
- Levi (Personal Mobile 041234567890)

Help ? Close ↻

Remove



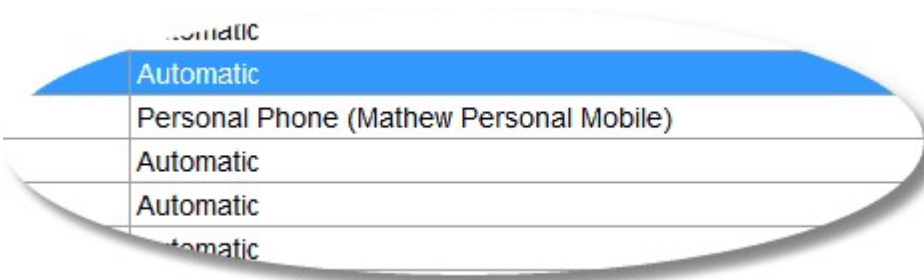
<input type="checkbox"/>	Angel Belinda
<input checked="" type="checkbox"/>	Anglin Brent
<input type="checkbox"/>	Anglin Mathew
<input type="checkbox"/>	Barton Mum

Tick a person in the Remove Column to remove them from the current SMS List.

Name

This column shows the person's name participating in the list

Search Type



Automatic
Automatic
Personal Phone (Mathew Personal Mobile)
Automatic
Automatic
Automatic

The Search Type column shows how Pastoral Care will determine the mobile phone number to use.

Automatic

On Automatic, Pastoral Care will use the Load Options on the main screen to find the correct phone number to use.

The load options include the Order to find phone numbers and the Family / Individual format options.

Fixed

If you use a Fixed Mobile number, you can manually override the selection of the phone number to use to be any available phone number in the family.

Changing Phone Numbers

Method to find phone numbers <input type="radio"/> Automatic <input checked="" type="radio"/> Fixed		Working with: Anglin Brent
Available phone numbers Brent (Personal Mobile 041234567890) Family Mobile (041234567890) Family Phone (03-273214) Brent (Business Phone 03-273214)	Other family members phone numbers Katey (Personal Mobile 041234567890) Mathew (Personal Mobile 041234567890) Levi (Personal Mobile 041234567890)	

Automatic

On Automatic, Pastoral Care will use the load order options set in the main screen of the SMS manager to select the phone number to use. The load options include the Order to find phone numbers and the Family / Individual format options.

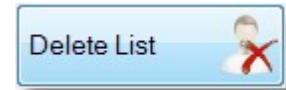
Fixed

If you use a Fixed Mobile number, you can manually override the selection of the phone number to use to be any available phone numbers in the family.

You can see from the sample above, Brent's Personal Mobile has been manually selected for use when this list is used, and a message is sent to Brent Anglin.

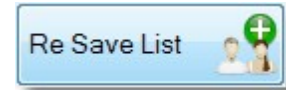
Delete List

Delete the selected SMS List.



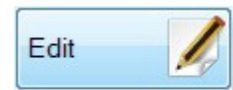
Re Save List

The Re Save list function simply re-scans all names in the list and checks the list over against the currently selected Search Order options and refreshes the list if there have been any changes. Note: Phone Numbers are always selected live at the time of loading a list so the latest phone number is always used.



Edit

The edit function lets you manually override the selected phone number for a person. Shown below we have selected Marion Allwright and pressed the Edit Button. from here you can select any phone number from the family file, and press the Replace button to change the phone number in the current send to phone numbers.



Edit Phone Number ✕

Marion Allwright current phone number selection:
041234567890

Available phone numbers from Family File

Phone Number	Type	Owner	Hidden
054-33-5478	Family Phone	Family Phone	No
0447710552	Personal Mobile	Stephen	No
018-998725	Business Phone	Stephen	No
041234567890	Personal Mobile	Marion	No
054-229876	Business Phone	Marion	No

Replace
Close

Email Manager

The Pastoral Care Email Manager is the main area for sending emails from. There are other areas throughout the program that also have Email features. These are similar to the Email Manager however they have less features and are more controlled by the area they are used in. Each of the other email areas are documented in their own relevant locations. For example, you can send an email from the main menu, the family file and the reporting areas etc.

Send an email from...

The Main Menu [Quick Email](#), [Address Book](#)

The Family Editor [Family File Toolbar](#)

Reports [The Report Viewer Toolbar](#)

Rosters [SMS / EMAIL Rosters](#)

See also [Using Pastoral Care to Communicate](#) for information on SPAM requirements and other important issues surrounding the use of emails to communicate with people.

How to send an email

Here are a few simple steps on sending an email to a group of people. It is worthy to note that the email manager is really designed for managing the process of sending emails to multiple people at the same time. To send an email to one person or one family, use the Email Icon on the [Family File Toolbar](#).

- 1 Use Filters to select the groups of people you want to work with. [See Filters](#)
- 2 Choose Family Mode or Individual Mode for composing the email to. [Email Format](#)
- 3 Press the Load Button on the toolbar to load in the people you have selected using the filters. [Email Manager Toolbar](#)
- 4 Compose the email [Compose Email](#)
- 5 Add any Attachments needed [Add Attachments](#)
- 6 Send the email using the Send button. [Email Manager Toolbar](#)

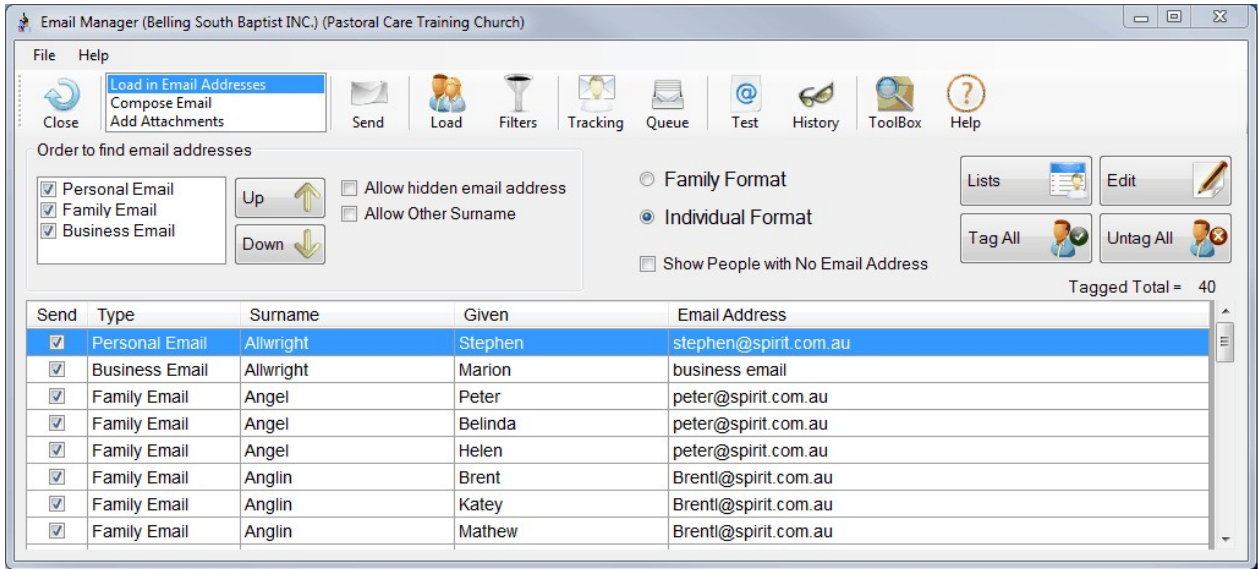
Email Manager Main Window

Shown below is the Email Manager main window. (See also [How to send an email](#) for steps on sending an email)



Click on each part of this window to learn more about the email manager.

See also [Load In Email Addresses](#), [Compose Email](#) and [Add Attachments](#)

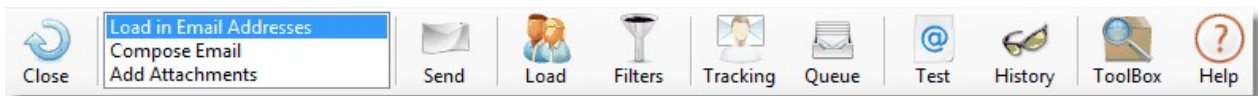


Toolbar



Click on each of the toolbar areas below to learn more.

See also [Load In Email Addresses](#), [Compose Email](#) and [Add Attachments](#) also.

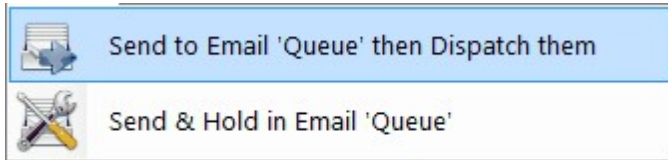


Send

After selecting people to send an email to, and composing your email, press the Send button to process all outbound emails to the [Email Queue](#) where they will be dispatched to each individual person.



There are 2 send options when you press Send. They are shown below.



Send and Dispatch

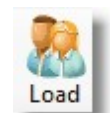
Send and Dispatch sends all tagged people the composed email. All emails are composed after selecting this option and send to the Email Queue program. This program will run in the background and send the emails off without interrupting the use of the computer.

Send and Hold

This option sends all tagged people the composed email, and holds them in the queue to be sent later (manually from the queue)

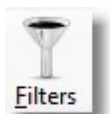
Load

Press the Load Button to load people into the Email Manager for sending an email to. People can be loaded as Individuals, or FamilyBased email loading can be selected. See [Email Format](#) for more on Individuals vs Families.



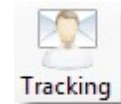
Filters

Press the Filters Button to use the standard Pastoral Care [Filters](#) to locate people by groups and many other criteria.

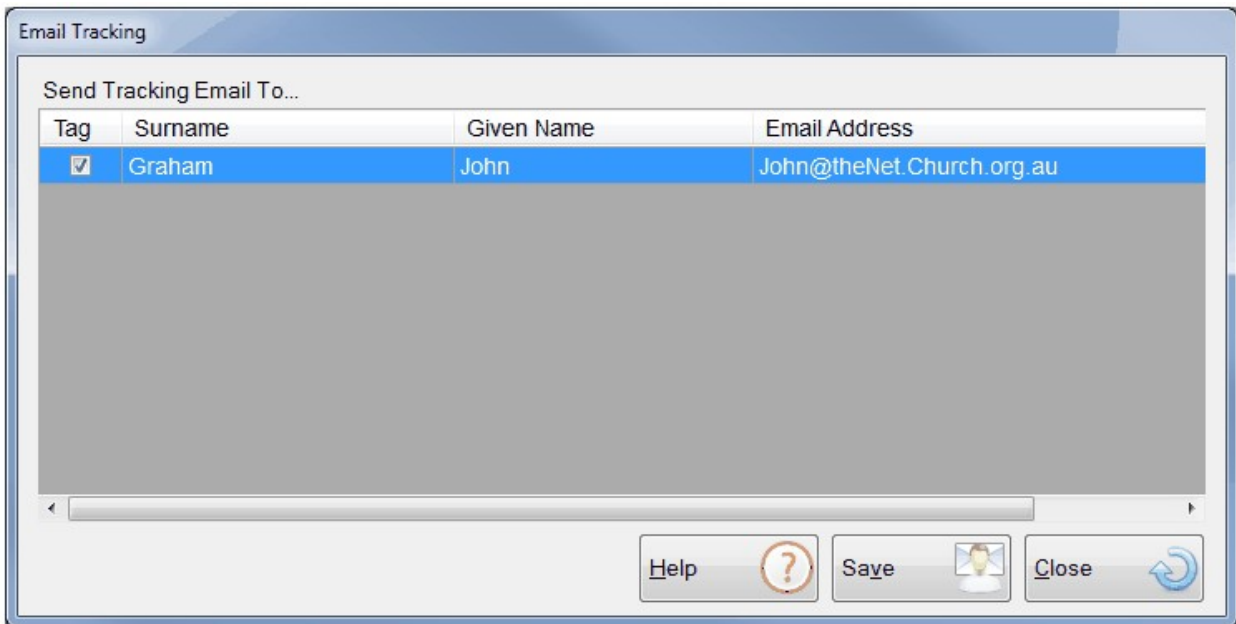


Tracking

The Tracking Feature lets you select pre-setup email addresses to send a BCC to (Blind Carbon Copy) of the email. The tracking email will tell the recipient who the email was sent to, and what was in the email.



Simply Tick the person(s) that you want to send a tracking email to. See [Setting Up Email Tracking](#) for information on adding people to this tracking list.



Queue

The Queue Button opens the standard Email Queue program. See [Email Queue](#) for full details.



Test

This feature allows you to manually send 1 email to a manually entered email address. If you want to see what your email looks like, then using this option allows you to compose an email and send it first as a test before sending out to everyone you want to send the email to!



History

Press the History button to see a list of sent emails. The History window shows the last 200 emails sent, the Subject, Body and who the emails were sent to is recorded.



Load In Email Addresses

Loading in emails is simply the process of choosing who you want to email, and which email address you want to use for each person. As with many areas of Pastoral Care, you can choose to compose an email for Individual people, or a more Family orientated email. This can be done by selecting the Family or Individual Format options. (See [Email Format](#))



Click on each area below to learn more about loading in email address information.

Order to find email addresses

<input checked="" type="checkbox"/> Family Email <input checked="" type="checkbox"/> Personal Email <input checked="" type="checkbox"/> Business Email	Up ↑ Down ↓	<input type="checkbox"/> Allow hidden email address <input type="checkbox"/> Allow Other Surname	<input checked="" type="radio"/> Family Format <input type="radio"/> Individual Format <input type="checkbox"/> Show People with No Email Address	Lists Tag All	Edit Untag All
--	----------------	---	---	------------------	-------------------

Order to Find Addresses

<input checked="" type="checkbox"/> Family Email <input checked="" type="checkbox"/> Personal Email <input checked="" type="checkbox"/> Business Email	Up ↑ Down ↓	<input type="checkbox"/> Allow hidden email address <input type="checkbox"/> Allow Other Surname
--	----------------	---

When you select Family Format or Individual Format, Pastoral Care automatically sets the sort order for Family Email or Personal Email. You can use the Up and Down buttons here to manually change the priority for loading of email addresses.

Allow Hidden Email Address

Tick this option to force Pastoral Care to load in hidden email addresses. A hidden email address is one where the Hidden flag is ticked in the Family File.

Allow Other Surname

When in Individual Format, you can choose the Allow Other Surname option so that Pastoral Care can insert a person's individual surname when that field is filled in in their family file.

Email Format

Choose Family Format for sending an email to a family

Choose Individual Format for sending an email to individuals.

You can also tick the option to shown people with no email address. This is not recommended as naturally you will not be able to send them an email!

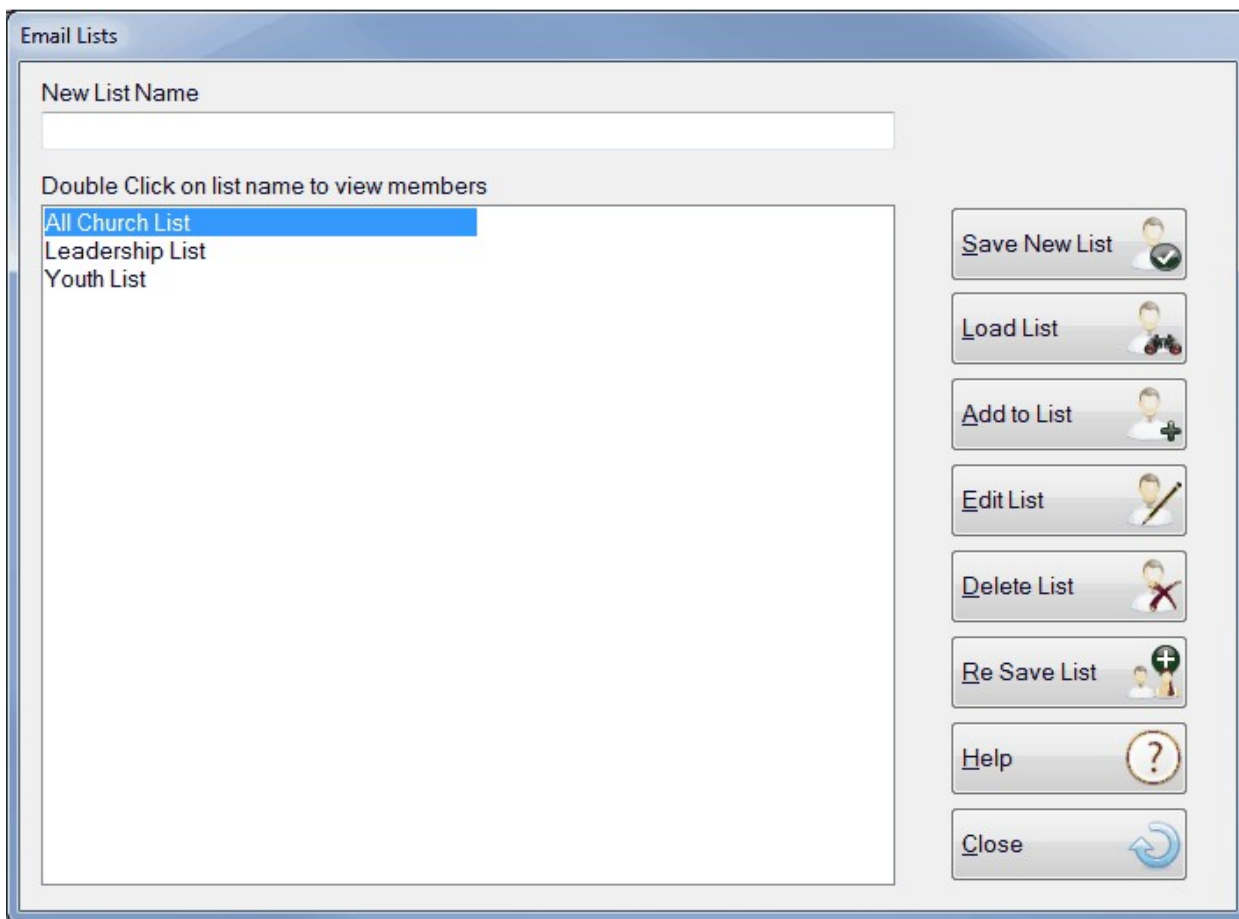
<input checked="" type="radio"/> Family Format <input type="radio"/> Individual Format <input type="checkbox"/> Show People with No Email Address

Lists

Pastoral Care lets you save groups of people as email distribution lists. These can be edited in the future, so if new people need to be added to the list or some people need to be removed from the list, it can easily be done with the Lists feature.



Click on each part of the Lists window below to learn more about this feature.



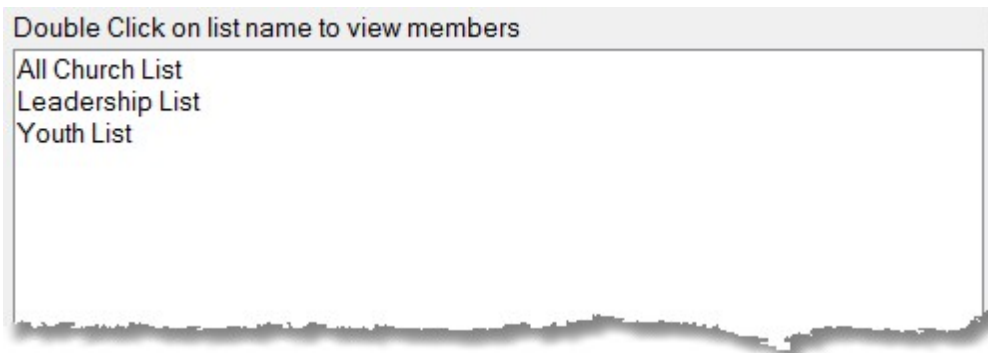
New List Name

Enter a New List Name and press the [Save New List](#) button to save a list. The people on this list will be all the currently loaded and tagged people.

New List Name

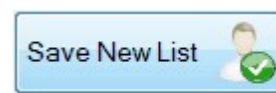
Current Lists

This shows all your current Email Lists. To view all members of the list double click on the name of the list you want to view.



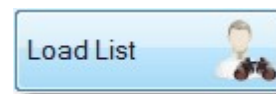
Save New List

After entering a new name in the [New List Name](#) box, press the Save New List button to save all currently tagged people to that new list.



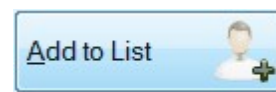
Load List

Press the Load List to load all people attached to the selected list.



Add To List

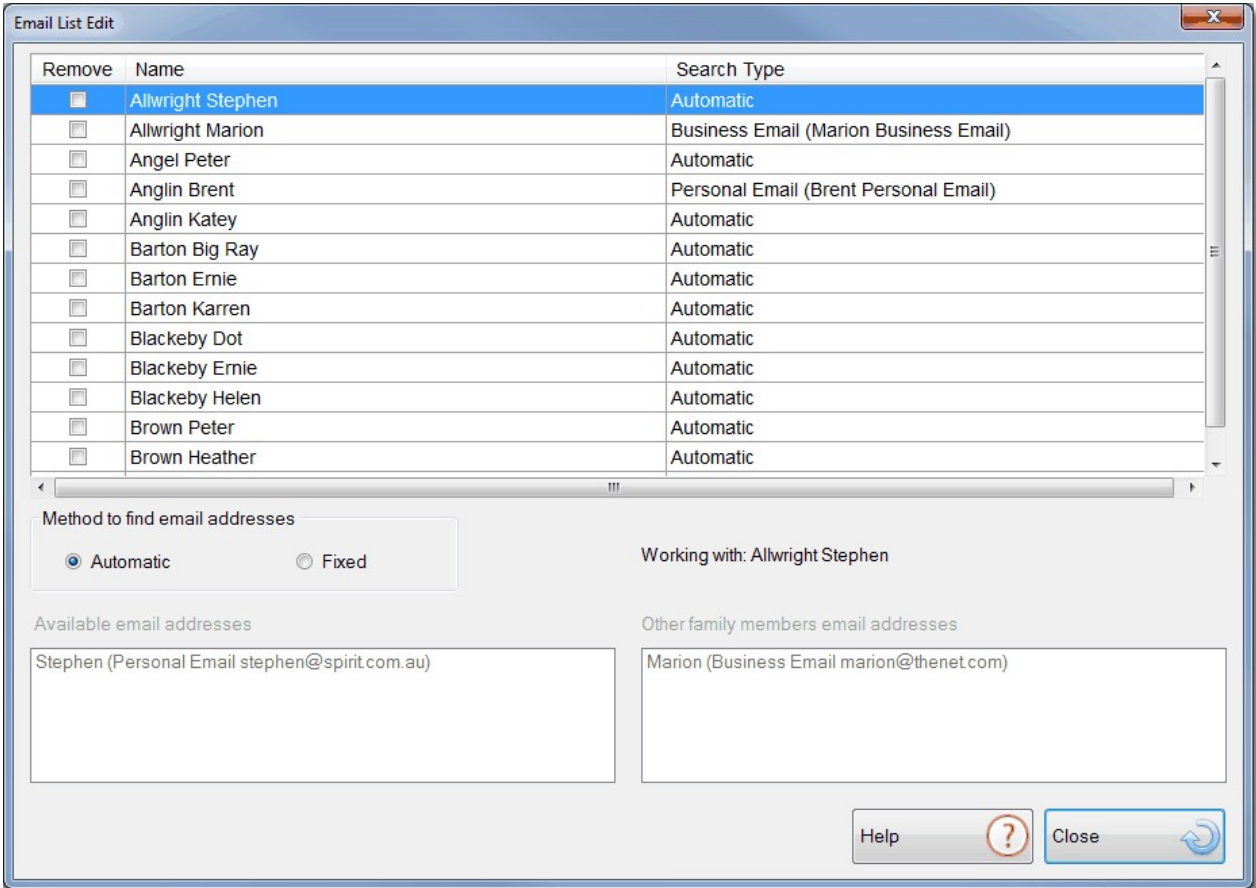
Pressing the Add To List button takes all Currently Tagged people in the Email Manager (People you have loaded and tagged) and adds them to the selected list.



Edit List



Click on each part of the Edit List window below to learn more about editing Email Lists.



The screenshot shows the 'Email List Edit' window with a table of contacts and search types. Below the table are radio buttons for 'Automatic' and 'Fixed', and two text boxes for email addresses.

Remove	Name	Search Type
<input checked="" type="checkbox"/>	Allwright Stephen	Automatic
<input type="checkbox"/>	Allwright Marion	Business Email (Marion Business Email)
<input type="checkbox"/>	Angel Peter	Automatic
<input type="checkbox"/>	Anglin Brent	Personal Email (Brent Personal Email)
<input type="checkbox"/>	Anglin Katey	Automatic
<input type="checkbox"/>	Barton Big Ray	Automatic
<input type="checkbox"/>	Barton Ernie	Automatic
<input type="checkbox"/>	Barton Karren	Automatic
<input type="checkbox"/>	Blackeby Dot	Automatic
<input type="checkbox"/>	Blackeby Ernie	Automatic
<input type="checkbox"/>	Blackeby Helen	Automatic
<input type="checkbox"/>	Brown Peter	Automatic
<input type="checkbox"/>	Brown Heather	Automatic

Method to find email addresses
 Automatic Fixed

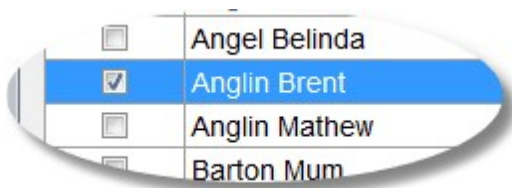
Working with: Allwright Stephen

Available email addresses
Stephen (Personal Email stephen@spirit.com.au)

Other family members email addresses
Marion (Business Email marion@thenet.com)

Buttons: Help, Close

Remove



Tick a person in the Remove Column to remove them from the current Email List.

Name

This column shows the person's name participating in the list

Search Type



The Search Type column shows how Pastoral Care will determine the Email Address to use.

Automatic

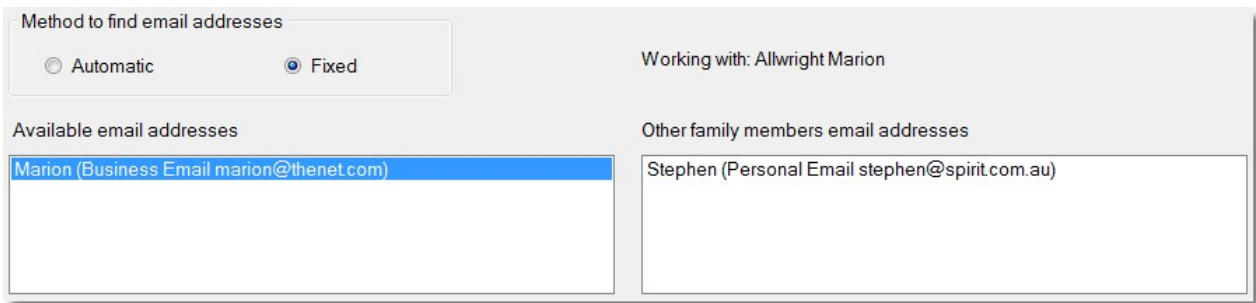
On Automatic, Pastoral Care will use the Load Options on the main screen to find the correct email to use.

The load options include the Order to find Email Addresses and the Family / Individual format options.

Fixed

If you use a Fixed Email Address, you can manually override the selection of the Email Address to use to be any available address in the family.

Changing Email Addresses



Automatic

On Automatic, Pastoral Care will use the load order options set in the main screen of the Email Manager to select the address to use. The load options include the Order to find Email Addresses and the Family / Individual format options.

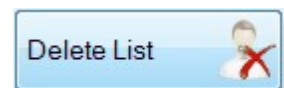
Fixed

If you use a Fixed Email Address, you can manually override the selection of the address to use to be any available Email Address in the family.

You can see from the sample above, Marion's Business Email has been manually selected for use when this list is used.

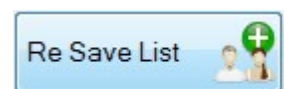
Delete List

Press this button to delete the currently selected list.



Re Save List

The Re Save list function simply re-scans all names in the list and checks the list over against the currently selected Search Order options and refreshes the list if there have been any changes. Note: Email Addresses are always selected live at the time of loading a list so the latest address is always used.



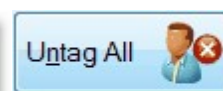
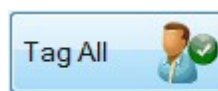
Edit

Pressing the Edit Button lets you change the email address for the selected person to another email address that appears anywhere in that family file.



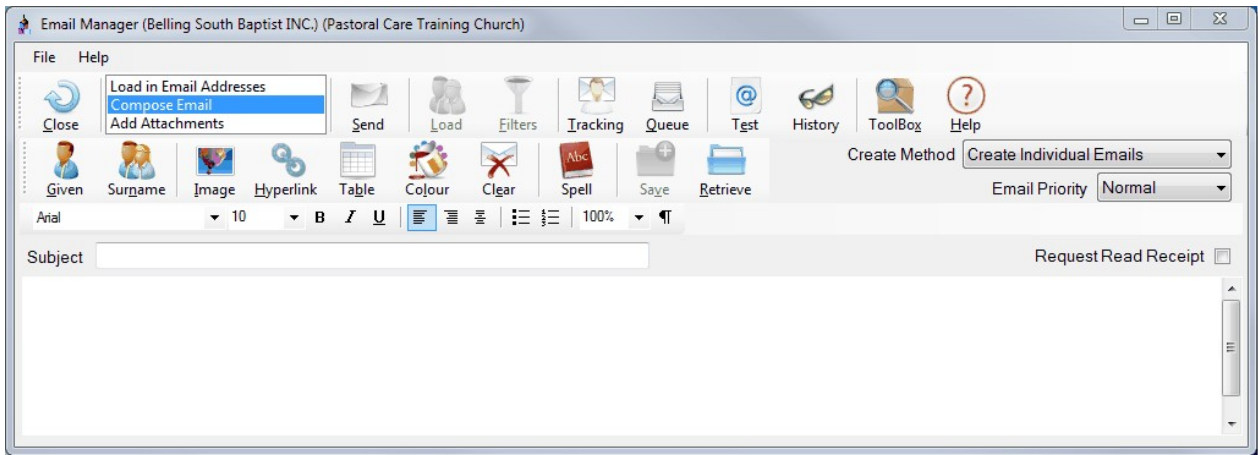
Tagging

Press the Tag All button to tick all people in the loaded list to receive and email, press the Untag All button to remove all people in the loaded list from receiving an email.



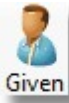
Compose Email

The Compose Email option changes the Email Manager screen into a mode for creating an email. Click on each part of the Compose Email window below to learn more.



Toolbar

Shown below are each of the Toolbar items on the Compose Email area of The Email Manager,



Insert a field for a person's Given Name to be used in the email.



Set the colour of your text or background of text to any colour you desire!



Insert a field for a person's Surname to be used in the email.



Erase the contents of the currently composed email.



Insert an Image into the email. See [Image](#) for more details on this.



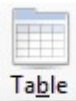
Access the Spell Checker Settings



Insert text as a Hyperlink into the email. See [Hyperlink](#) for more details.



Save an email as a template for later re-use. Rather like a permanent draft copy that you can re-use over and over again.



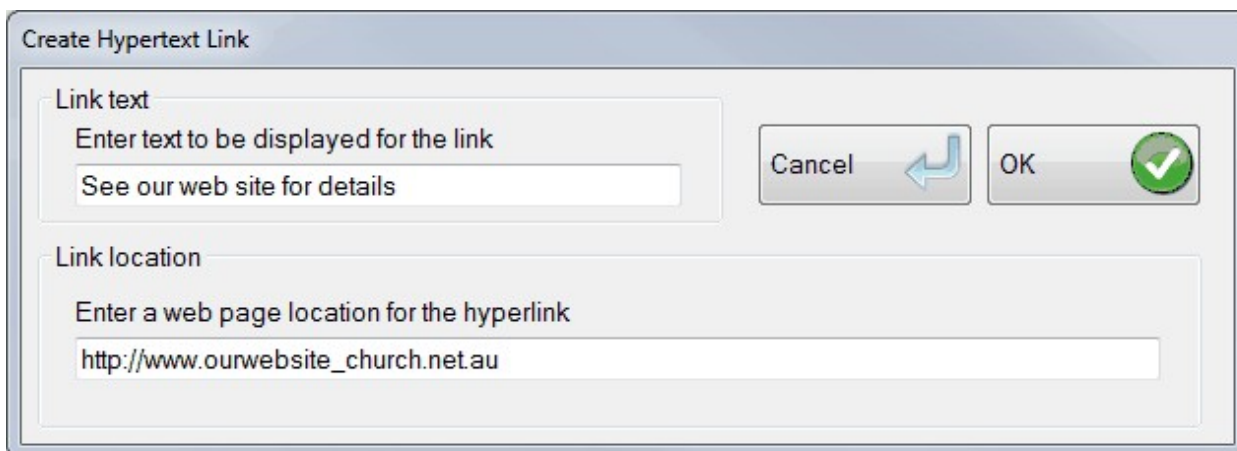
Insert a Table into the email. Tables are ideal for laying out an email with just the way you want to see it. Table borders can be transparent giving to the ability to place text and graphics in specific locations.



Load in a saved email for use. Naturally the loaded email can be edited and changed if required.

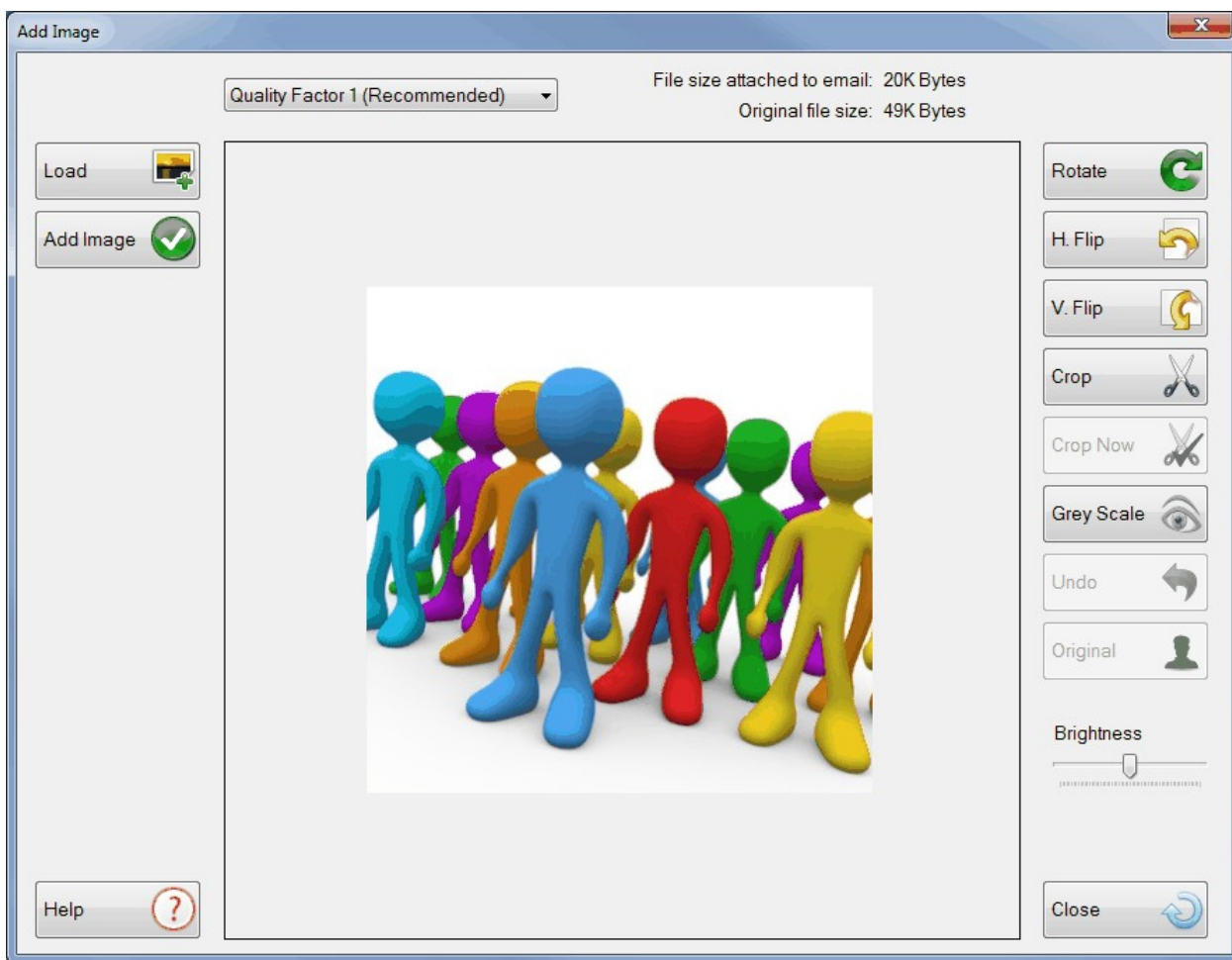
Hyperlink

Type in some text for the display of the hyperlink, and the web site address that you want to load when the hyperlink is clicked in the email.



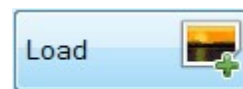
Image

Click on each part of the Add Image box below to learn more about adding an image to an email. Note, once an image has been added to an email, you can select and re-size the image from the email itself before sending it out.



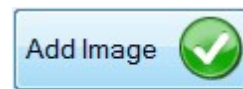
Load

Load an image from a file to be added to the email.



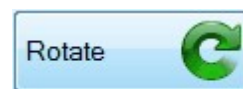
Add Image

Add the selected (and modified if you have done any modifications) image to the current position in the email. Note once an image has been added, you can re-size the image directly in the email using the mouse to click and drag the corners of the image.



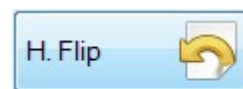
Rotate

Rotate the image 90 Degrees to the right. Keep pressing this to continue the rotation in 90 degree steps.



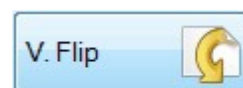
H Flip

Flip the picture (mirror) horizontally.



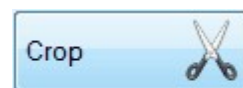
V Flip

Flip the picture (mirror) vertically.



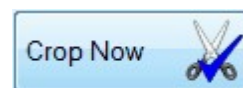
Crop

Select an area of the picture to crop.



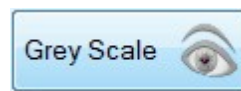
Crop Now

After marking an area with Crop, press the Crop Now button to complete the crop.



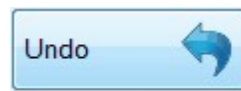
Grey Scale

Convert the picture to grey tones only.



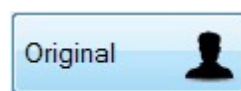
Undo

Where available, you can press this to undo the last edit to the picture.



Original

Use this to reload the original picture and discard all of your changes.



Brightness

Adjust the brightness of the picture.



Quality Factor



We recommend a Quality Factory of 1 for most images for an email. The original and projected file save size is shown next to the Quality Factor Selection.

Image Preview

This shows a preview of the selected image to be inserted in the email.



Font Options

Use the standard font controls for setting the font for the selected text, bold, italic underline etc.



Subject

Enter the subject for your email. Always use a clear and concise subject that lets the person receiving the email have a good idea on what the email is about.

Subject

Body

Enter the body of the email here. Don't forget you can use the Given Name and Surname objects for personalising the email being sent.

Read Receipt

Tick this option for a read receipt to be sent back to either the Logged In person's email address, or the Church Email address.

Request Read Receipt

Create Method

Force the email program to handle the emails as either Family or Individual Emails.

Create Method

Email Priority

Set the priority for the email to be sent as. This does not affect how fast the email is delivered, it can affect the display of emails in compliant email programs to show high priority emails in a different colour in the inbox.

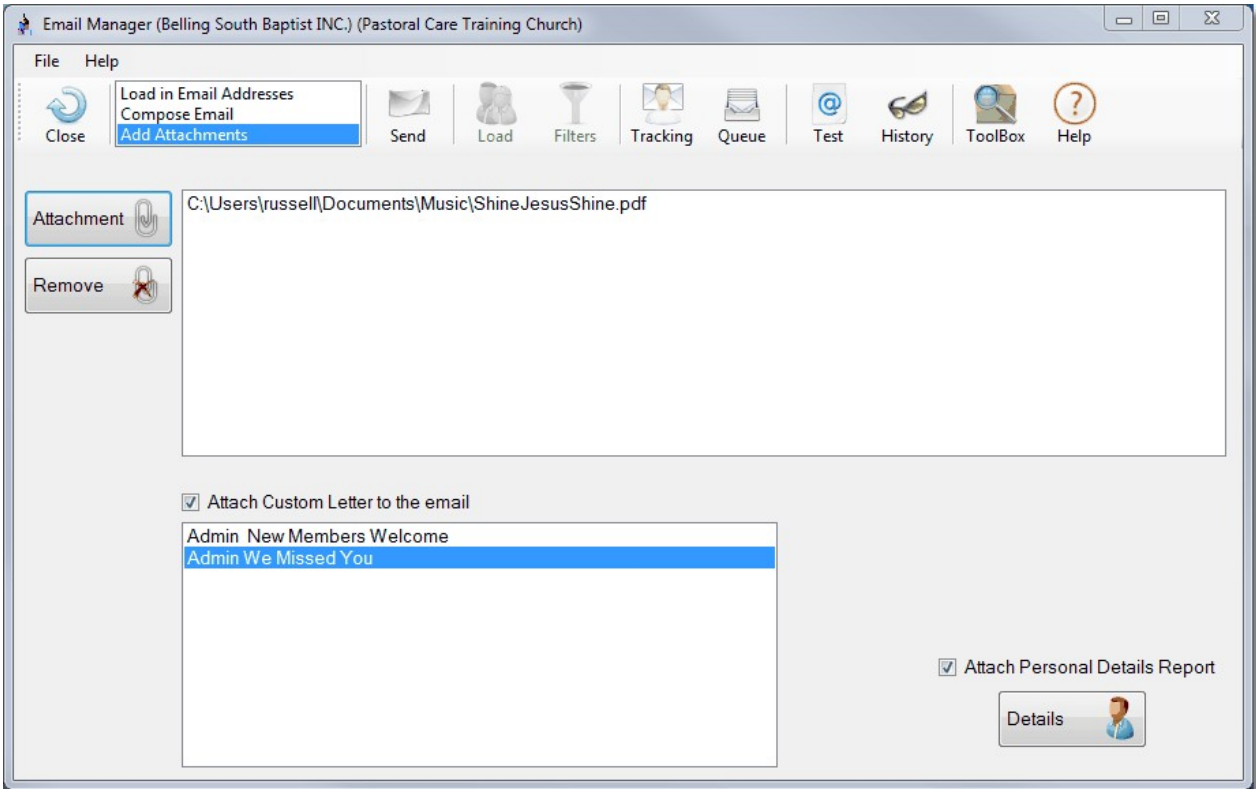
Email Priority

Add Attachments

The Add Attachments area lets you add a number of different attachments. As well as any file you can select from your computer, you can also select a Custom Letter to be auto field merged and attached as a PDF document, or a Personal Details Report to be created and attached as a PDF document.

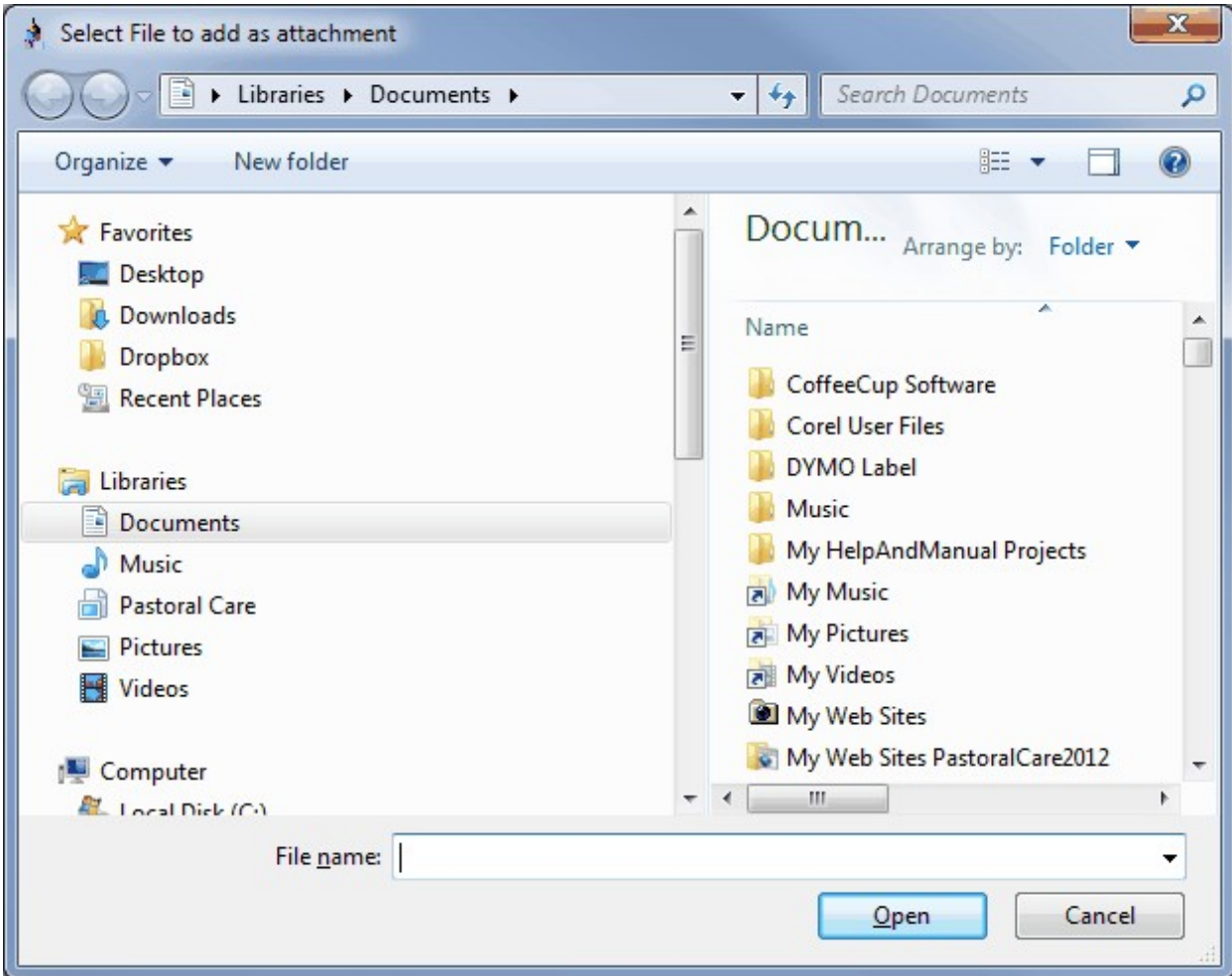
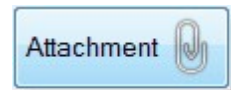


Click on each part of the Add Attachment window below to learn more.



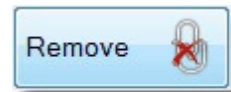
Attachment

Press the Attachment button to open a standard windows File Browse box for selecting the file you want to attach. You can add more than one attachment by pressing the Attachment button again and selecting another file.



Remove

Press the Remove button to remove the selected Attachment.



Attachment List

This shows the list of attachments you have added.

Custom Letter

This list shows any custom letters you can select to add to the email. The letter will be mail merged and outputted to PDF and attached to the email.

Personal Details Report

Use the Personal Details report to allow you to select any personal information you want to send to a person. The information selected in this area will be added to the email as a PDF attachment. See also [Pre-Flight](#) setting for the Personal Details report for full information on this area.

Tagging

The Tagging program is a great “Ad Hock” tool that helps you do things on mass and at Random! You can create random groups of people for a report output (Any report open to Pastoral Care can be used, including Custom Letters and Custom Reports). You can select groups of people to tag as a specific group, or tag a date field, flexi field etc.

Tagging lets you to browse through people’s names and mark [tag] them for a process.

See the following areas for more information:

[Jobs that Tagging can do](#)

[How to Add People to Groups](#)

[How to Remove People from Groups](#)

[The Tagging Main Window](#)

Jobs that Tagging can do

Below is a list of some practical tasks that Tagging can assist you with, followed by specific descriptions of each area / function. See also [The Tagging Main Window](#) for more information on this feature

See also [Tagging How To](#) for more information and samples of how to achieve a few common tasks.

- Adding People to a group
- Removing People from a group
- Bulk setting up Male / Female gender properties
- Merging 2 small home groups
- Splitting Up a home group that has grown too large.

Processes that can be performed on the selected people are:

Individual Tagging Functions

(See [Individual Categories](#) for more information on the following functions)

Area	Tagging Functions Available
Individual Details	Add or remove people from Individual properties such as Conditions, Gender, Titles and Occupations.
Status	Add people or remove people from Status groups.
Individual Groups	Add people or remove people from Individual groups.
Active and Potential Ministries	Add people or remove people from Active or Potential Ministry groups.
Individual Dates	Add people or remove people from Individual Date groups.
Flexi Fields	Add people or remove people from Flexi Field groups, including adding them as a tagged participant in the flexi group and also adding flexi field description information into each person's flexi field.
Medical Groups	Add people or remove people from Medical groups, including adding medical notes on mass to all tagged people.
Relationships	Add people or remove people from Relationship groupings with other people.
Email and SMS Lists	Add people or remove people from Email and SMS Lists.
Reports	Output selected people to ANY report in Pastoral Care, including Custom Directories, Custom Reports, Analysis Reports and any built in Pastoral Care report.

Family Tagging Functions

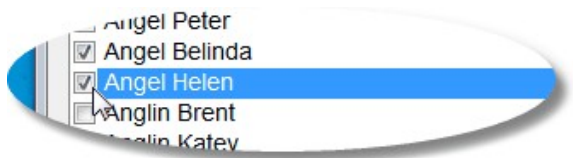
Area	Tagging Functions Available	See
Family Details	Add or remove people from a Family Condition (Active, Archive etc), set a Visitation Target for all tagged people and add a File Memo to all tagged people.	Family Details
Visitation	Tag people for a Visitation Request. This includes setting a Visitation Team and Team Member to visit the tagged people.	Visitation
Family Groups	Add people or remove people from Family Groups.	Family Groups
Family Dates	Add people or remove people from Family Dates. You can add a Date Tag, a Date or Both to all tagged people.	Family Dates
Suburb	Add people or remove people from a Suburb.	Suburb
Format Fields	For the tagged people, format selected fields with Upper Case, Sentence Case or Lower Case options.	Format Fields
Reports	Output selected people to ANY report in Pastoral Care, including Custom Directories, Custom Reports, Analysis Reports and any built in Pastoral Care report.	Reports

Tagging How To

The following How To topics outline some of the practical uses for tagging and how to apply them to managing your church.

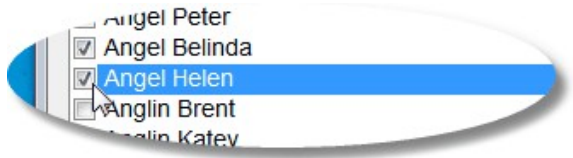

How to Add People to Groups

To tag people and add them to a group complete the following process:
From the Tagging area (available from the Main menu - Explore Tab)...

Step	Action	See
1	Select Individual or Family Categories to work with.	Processing Mode
2	Set any filters to restrict the people you want to work with to a selected range of people.	Filters
3	Press Load on the Tagging Toolbar to load the people into	The Tagging Toolbar
4	Choose a Category from the Available Categories List.	Available Categories
5	Tick those people that you want to process. (Add or Remove from a selected grouping)	
6	Select Add. (If Add / Remove options are not visible, then ADD only is available)	
7	Press the Process Button	The Tagging Toolbar

How to Remove People from Groups

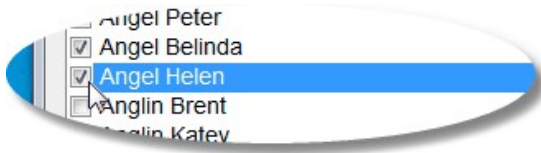


To tag people and remove them from a group complete the following process:
 From the Tagging area (available from the Main menu - Explore Tab)...

Step	Action	See
1	Select Individual or Family Categories to work with.	Processing Mode
2	Set any filters to restrict the people you want to work with to a selected range of people.	Filters
3	Press Load on the Tagging Toolbar to load the people into	The Tagging Toolbar
4	Choose a Category from the Available Categories List.	Available Categories
5	Tick those people that you want to process. (Add or Remove from a selected grouping)	
6	Select Remove. (If Add / Remove options are not visible, then ADD only is available)	
7	Press the Process Button	The Tagging Toolbar

Join two home groups together

This process is a logical combination of using FILTERS and TAGGING. Lets say we want to join the Barkers home group with the Smiths home group, leaving the Smiths Home Group as the one bigger group, and the Barkers group disbanded.

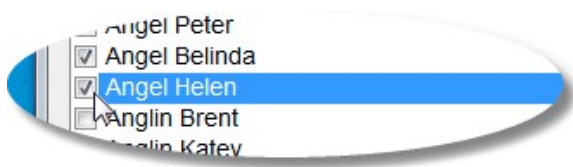


Follow these steps.

Step	Action	See
1	Select Individual Categories to work with.	Processing Mode
2	Select a filter for the Barkers Home Group	Filters
3	Press Load on the Tagging Toolbar to load the people into	The Tagging Toolbar
4	Choose the Smiths Home Group from the Individual Groups area.	Available Categories
5	Tick ALL people in the list to process as these are all people loaded from the Barkers	
6	Select Add and press the Process Button	
7	Now while all Barker Home Group members are still ticked, select the Barkers Home group from the list of Individual Groups	The Tagging Toolbar
7	Select Remove and press the Process Button	
8	Finished! All members of the Barkers home group is now a member of the Smiths Home Group, and have also being removed from the Barkers Home Group!	

Make 2 groups from 1

This process is a logical combination of using FILTERS and TAGGING. Lets say we have one large home group called the Barkers home group. We want to create a second group called the Smiths by breaking up the first larger group.

Firstly go to Settings - Family File and create a new Individual Group call Smiths Home Group. Then Follow these steps from the Tagging area.

Step	Action	See
1	Select Individual Categories to work with.	Processing Mode
2	Select a filter for the Barkers Home Group	Filters
3	Press Load on the Tagging Toolbar to load the people into	The Tagging Toolbar
4	Choose the Smiths Home Group from the Individual Groups area.	Available Categories
5	Tick just the selected people that you want to MOVE to the new Smiths Group.	
6	Select Add and press the Process Button	
7	Now while the people are still selected that you have added to the Smiths home group, select the Barkers Home group from the list of Individual Groups	The Tagging Toolbar
7	Select Remove and press the Process Button	
8	Finished! Selected members only of the Barkers home group has now become a new group called the Smiths Home Group, and have also being removed from the Barkers Home Group!	

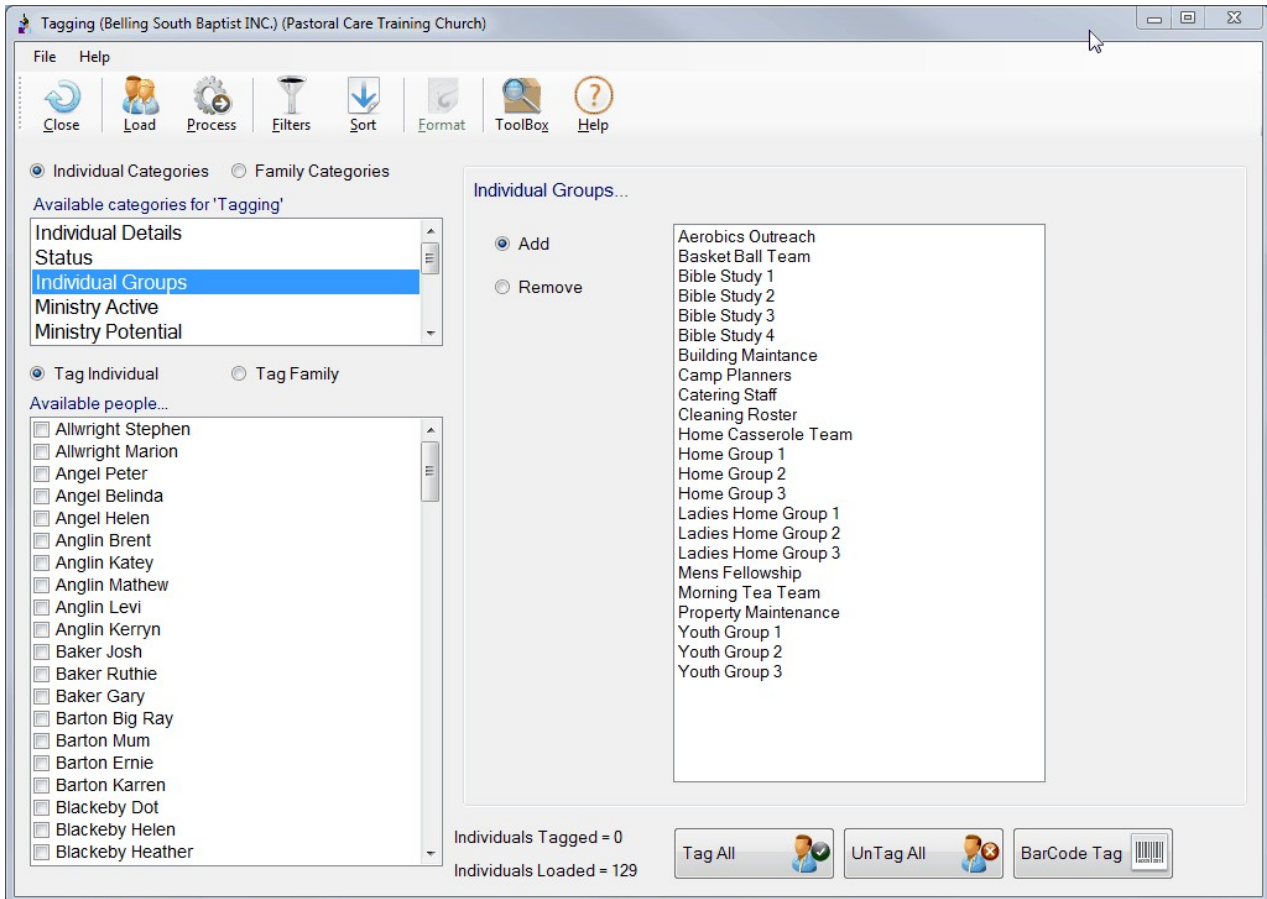
The Tagging Main Window

The following Tagging Window is shown with people loaded and Individual Groups selected as a sample. See each of the [Individual Categories](#) and [Family Categories](#) for full details of every option available in Tagging.

See also: [Jobs that Tagging can do](#), [How to Add People to Groups](#), [How to Remove People from Groups](#)



Click on each area on the window below to learn more about the Tagging feature.



The Tagging Toolbar

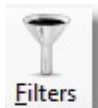
The following toolbar buttons are available on the Tagging Window.



Press the Load Button to load in selected people into the Tagging Area. Use [Filters](#) to locate selected groups of people.



Press the Process button to complete the selected tagging operation. Please note: There is NO UNDO function in the tagging program. You should do a backup of Pastoral Care data before you do any large tagging operations in case you accidentally do something wrong!



Use the standard Pastoral Care [Filters](#) window to locate selected groups of people. For example, if you want to remove all Home Group members from a selected home group, use Filters to find all people in the home group, and then tag all and remove people from a selected home group.



Use the standard Pastoral Care [Sort](#) options to apply further filtering to the selection of people when you press load. For Example, you can use Sort to find all people with a Birthday in a specific month etc and load them in for tagging.



Access the standard Pastoral Care [Format](#) options for formatting any reports that you output from the Tagging area.

Processing Mode

Individual Categories Family Categories

The Tagging area has two main processing Modes. Family and Individual. Each mode has its own unique set of available functions that can be performed.

Individual Categories

These are primarily Individual Groups etc that you can add people to or remove people from. See [Individual Categories](#) and [Jobs that Tagging can do](#) for more information.

Family Categories

These are more specialised functions, as well as Family Group information that can be added to and removed from people, there is also Visitation, Family Details, and Field Formatting capabilities in this area. See [Family Categories](#) and [Jobs that Tagging can do](#) for more information.

Available Categories

Shown below are the two main lists of Available Categories for [Individual Categories](#) and [Family Categories](#) in Tagging.

(See also [Processing Mode](#))



Click on each if the lists below for more information.

Individual Categories Family Categories

Available categories for 'Tagging'

- Individual Details
- Status
- Individual Groups
- Ministry Active
- Ministry Potential
- Medical
- Relationships
- Individual Dates
- Flexi Fields
- SMS List
- Email List
- Reports

Individual Categories Family Categories

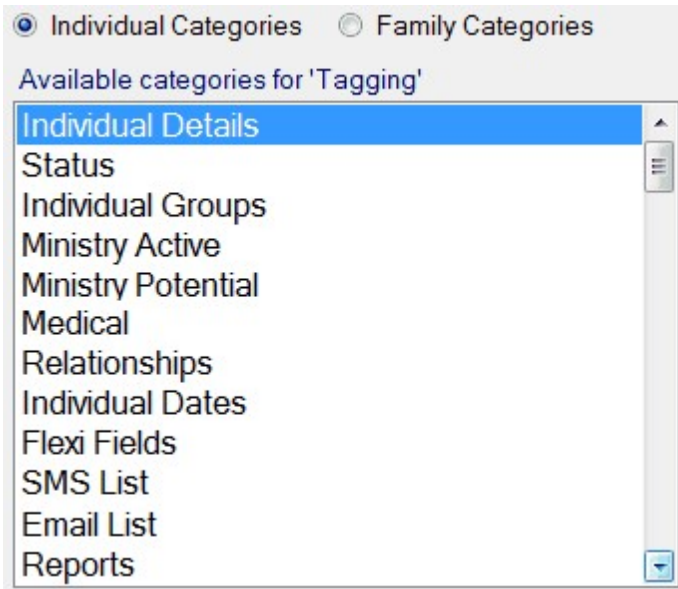
Available categories for 'Tagging'

- Family Details
- Visitation
- Family Groups
- Family Dates
- Suburb
- Format Fields
- Reports

Individual Categories



Click on each of the Individual Categories shown in the list below. Note the list is shown fully expanded here for ease of viewing.



Individual Details

There are 4 different Individual Details areas that can be processed in Tagging. This allows you for example if you are new to Pastoral Care 12, and you have now yet set people in their family file as Male or Female (A new field in Pastoral Care 12) you can load in all people and manually tag all the men in the church and use the Enable Gender tag and process them all as Male. If you use Flexi Fields for Gender in your earlier database, you could use filters to load in all Males and then just Tag All at once, and process them as Males using Gender.

Note: The Individual Areas (shown below) are all ADD ONLY. There is no bulk remove function for these items. These areas in Tagging are ideal for setting up a new Database if you are new to Pastoral Care as you can bulk add information to the tagged people quickly and easily.

Enable Individual Condition tagging

Active
 Privacy Request
 Prospect
 Archive
 Contact
 Deceased

Tag people and add a selected Individual Condition to each person tagged. This is an ADD only function.

Enable Gender tagging

Unknown
 Male
 Female

Use Gender to bulk update tagged (Selected) people to a selected Gender.

Enable Title tagging

Mr. Hidden

Use Title Tagging to bulk update (selected) people to a selected Title. In addition you can automatically set all at the same time to Hidden.

Enable Occupation tagging

Plumber
 Builder
 Electrician
 Technician
 Clerical
 Salesman
 Nurse
 Doctor

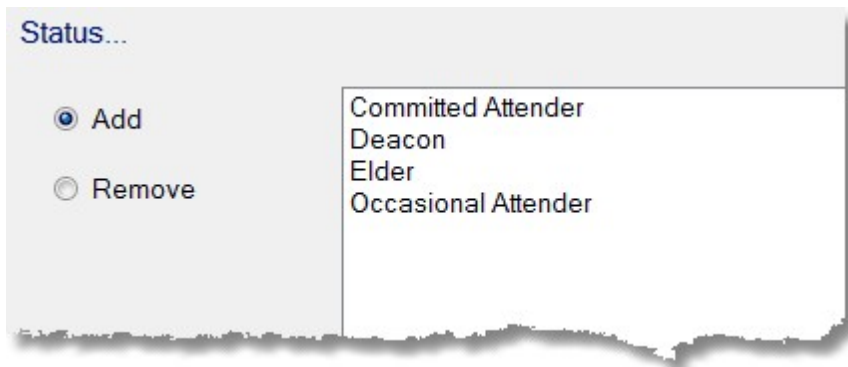
Hidden

Use Occupation Tagging to bulk update (selected) people to a selected Occupation. In addition you can automatically set all at the same time to Hidden.

Status

Use Status to bulk update the Status of people. This can be either Adding a Status to people, or Removing a Status from people.

Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



Individual Groups

Use Individual Groups to bulk update either Adding people to an Individual Group or Removing them from an Individual Group.

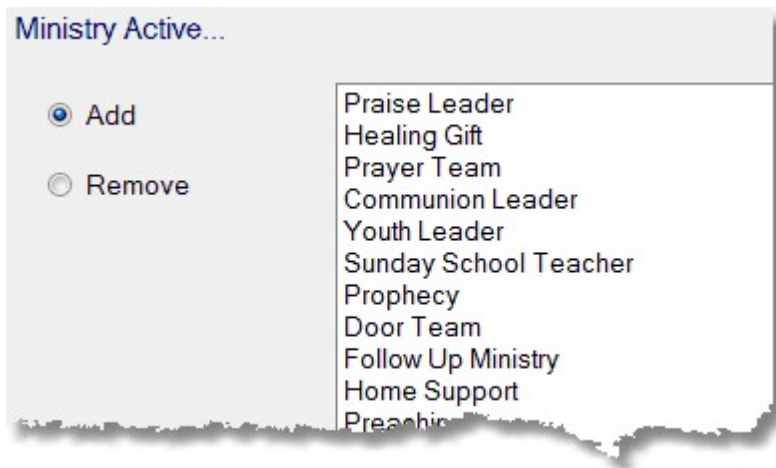
Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



Ministry Active

Use Ministry - Active to bulk update either Adding people to an Active Ministry or Removing them from an Active Ministry.

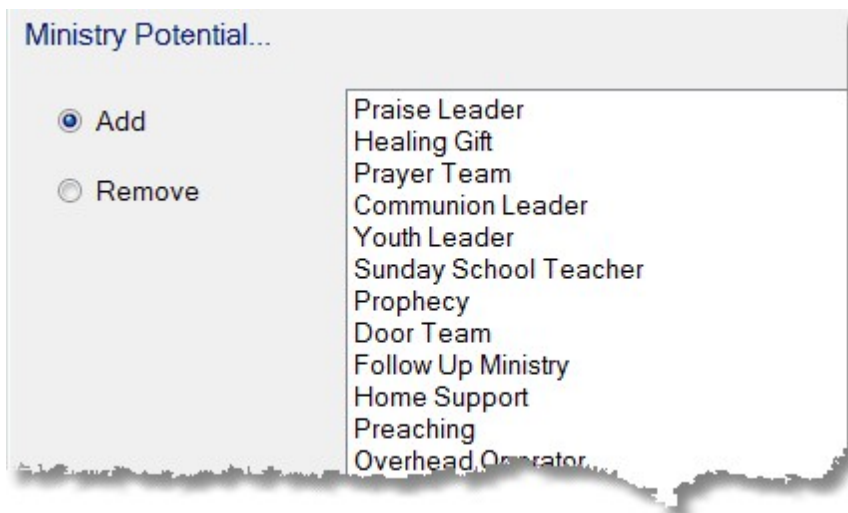
Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



Ministry Potential

Use Ministry - Active to bulk update either Adding people to an Active Ministry or Removing them from an Active Ministry.

Note the sample below will look different to your groups as our sample setup may be different to your actual settings.

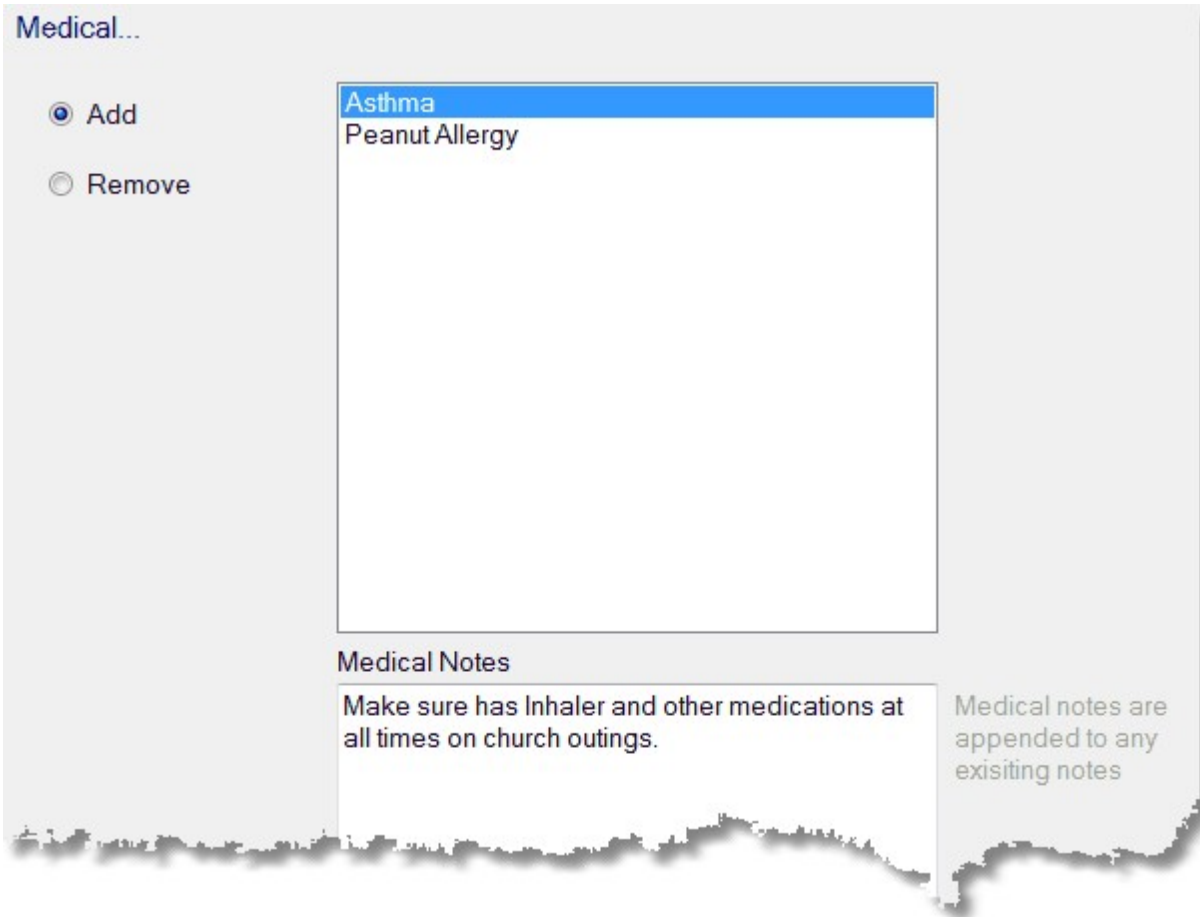


Medical

Use Medical to bulk update either Adding people to a Medical Group or Removing them from a Medical Group. You can also update all tagged people with Medical Notes if there are standard notes that you want to add to all people with for example Asthma.

If notes already exist for a tagged person and you are adding notes with the Tag Process, the new notes do not overwrite the older notes, they will be appended on the end of any existing notes.

Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



Relationships

Add or remove people from Relationships. Note, a Relationship may not be only a Step Father, Grandmother etc, it may be a Carer, an Assigned Elder, Prayer Partner etc. There are many different uses for Relationships!


Steps to Add A Relationship

- Tag all people that you want add the same selected relationship to.
- Select Add and Select the Relationship (we have selected Elder)
- Press Add / Delete Relationship button and select the person who will be common in the relationship to all tagged people. (In this case we have selected the Elder names Ernie)
- Press Process on the toolbar to add Ernie Barton as the assigned Elder to all tagged individuals!

Relationships...

Add
 Remove

Real Father
Step Father
Real Mother
Step Mother
Step Son
Step Daughter
Grandparent
Elder

Add / Delete Relationship 

Relationship To...

Barton Ernie

Individual Dates

Use Individual Dates to bulk update an Individual Date of selected people. This can be either Adding an Individual Date to people, or Removing a Date from people.

This is most useful for adding the Tag of an Individual Date to many people, instead of an actual date, as it is unlikely that many people will have the same Membership Date for example.

Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



Individual Dates...

Add

Remove

Membership
Baptised
Confirmation
Christened

Date

Date Tag

Date

Only enter a date here if all tagged people are going to have the same date saved in their family file against the selected Individual Date

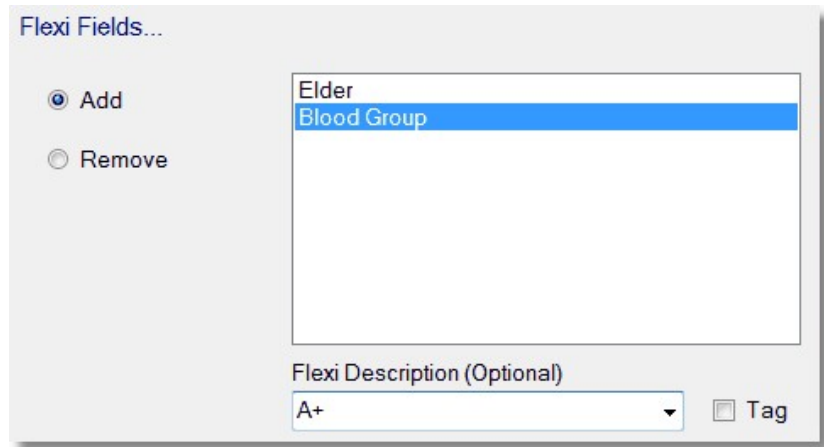
Date Tag

Tick the Date Tag option to have Pastoral Care tag all people with having the selected Individual Date.

Flexi Fields

Use Flexi Fields in Tagging to bulk update an Flexi Field on selected people. This can be either Adding or Removing a Flexi Field from selected people.

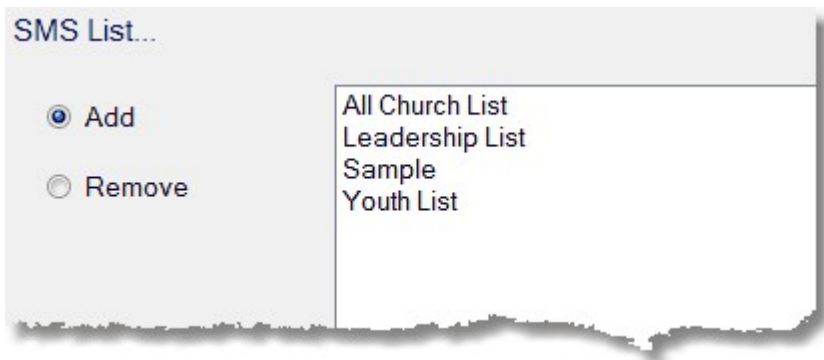
The example below shows us about to add a Blood Group of A+ to selected people. In this example we have chosen not to add a Tag of Blood Group at the same time as adding a description of A+ to the Flexi Field called "Blood Group"



SMS List

Use SMS List to bulk update the people participating in a selected SMS list. This can be either Adding or removing people from a selected SMS list.

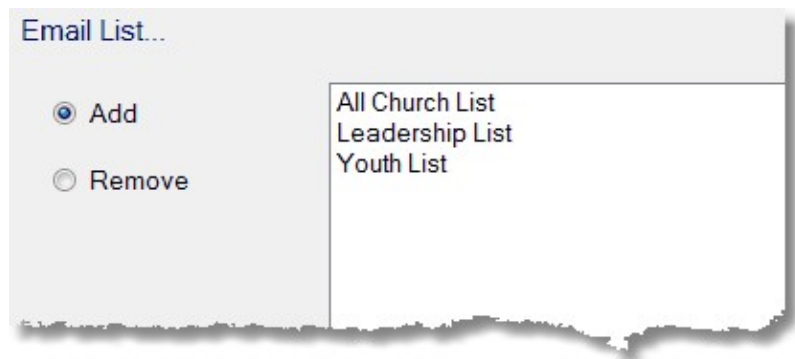
Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



Email List

Use Email List to bulk update the people participating in a selected Email list. This can be either Adding or removing people from a selected Email list.

Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



Reports

Reports lets you output tagged people to any Pastoral Care report. All reports including Custom Reports and Custom Letters and all standard built in reports and a Manual report are all available.

See [Pastoral Care Reports Master List](#) for information on all the reports available in Pastoral Care.

Family Categories



Click on each of the Family Categories shown in the list below. Note the list is shown fully expanded here for ease of viewing.



Family Details

Family Details tagging lets you change a number of Family related data areas on all people (families) you have tagged.



Click on each part of the Family Details feature below to learn more...

Family Details...

Enable Family Condition tagging

Enable Family Visitation Target

Active
Privacy Request
Prospect
Archive

Target

Enable File Memo tagging

Display Memo on opening file

Enter a File Memo to add to all tagged families here

Additional Memo is appended to existing memo's on the family file

Enable Family Condition Tagging

Tick this option and select a Family Condition to mark all tagged families with.

Enable Family Condition tagging

Active
Privacy Request
Prospect
Archive

Enable Family Visitation Target

Tick this option and enter a Target for the number of visitations per year that you want to visit this family.

Enable Family Visitation Target

Target

Enable File Memo Tagging

Tick this option and enter a File Memo that you want to have added to every family that you have ticked. Note, if a memo already exists, this memo you are adding will be appended to the end of the existing memo.

Enable File Memo tagging

Enter a File Memo to add to all tagged families here

Display Memo on Opening File

Tick this option to set the "Display Memo on Opening File" option for all families you have tagged.

Display Memo on opening file

Visitation

Visitation Tagging allows you to use the Tagging Program to select people and then assign them for visitation. This is the easiest method for browsing people and marking their family for a visit.



Click on each part of the tagging Visitation options below to learn more about this feature

Visitation...

Tag with Visitation Request
 Tag with Completed Visitations

Visitation Team
Wellness

Assigned to

ToDo	Name
2	Barton Mum
0	Blackeby Frank
0	Chapman Ruth
0	Collins Stephen
0	Dimsey Richard

History

Requested by

Date
Saturday , 24 November 2012

Send email upon Create Request

Pre Visitation Note

Post Visitation Note

Options

Choose to Tag People for a Visitation Request, OR to Tag People as having had a completed Visitation.

Tag with Visitation Request
 Tag with Completed Visitations

Visitation Team

Select the Visitation Team that is going to complete the Visit, or who has completed the Visit.

Visitation Team
Wellness


Assigned To

Select a person from the selected team to assign the visitation to, or who actually completed the visitation.

Pressing the History button will show you a summary of Visitations completed by the selected team member.

Assigned to

ToDo	Name
2	Barton Mum
0	Blackeby Frank
0	Chapman Ruth
0	Collins Stephen
0	Dimsey Richard

History 

Requested By

Enter the name of the person requesting the Visitation. This is normally the name of the person doing the Tagging at this point! The Date is the current date that you have saved the request, it is not a scheduled date for a visit.

Requested by

Date
Saturday , 24 November 2012

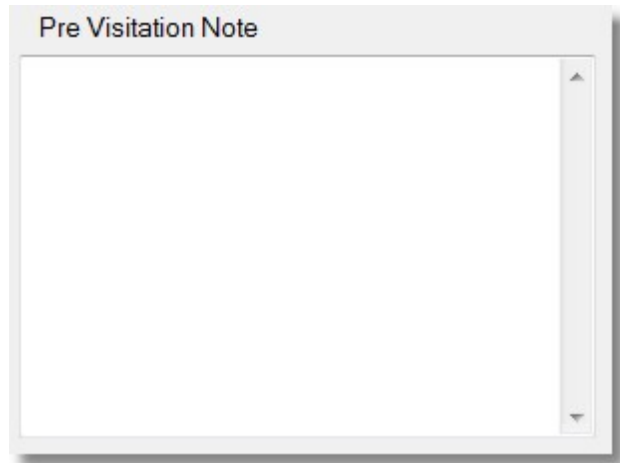
Send Email

Tick this option to send an email to the selected Visitation Team member.

Send email upon Create Request

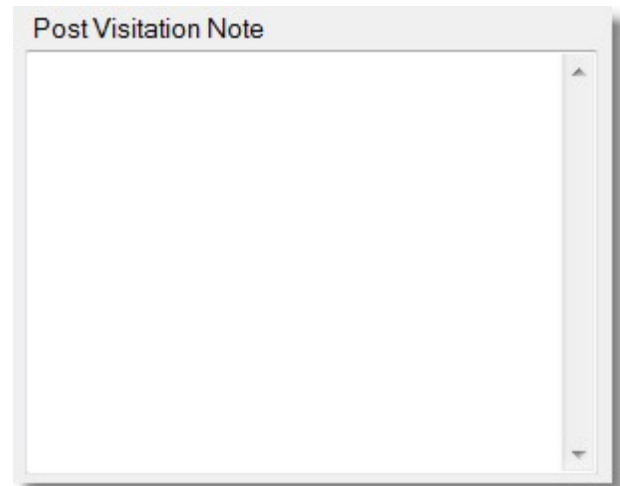
Pre Visitation Note

Enter a Pre Visitation Note to be added to all people you are creating the Visitation for.



Post Visitation Note

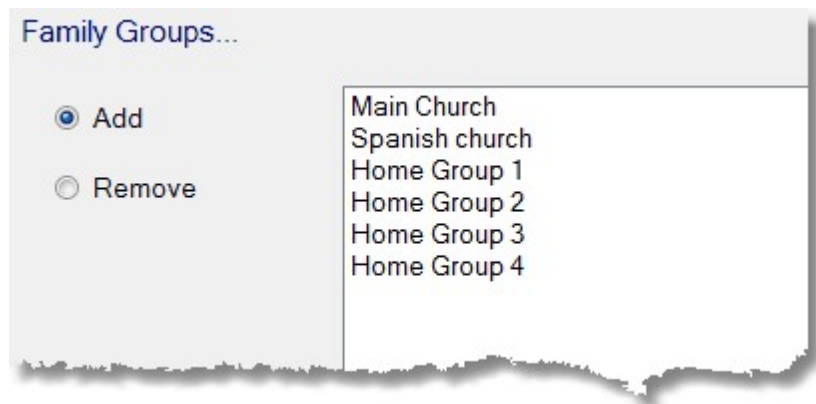
Enter a Post Visitation Note to be added to all people you are creating the Visitation for.



Family Groups

Use Family Groups to bulk update either Adding families to a Family Group or Removing them from a Family Group.

Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



Family Dates

Use Family Dates to bulk update either Adding families to a Family Date or Removing them from a Family Date.

Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



Date

Only enter a date here if all tagged families are going to have the same date saved in their family file against the selected Family Date

Date Tag

Tick the Date Tag option to have Pastoral Care tag all Families with having the selected Family Date.

Suburb

Use Suburb Tagging options to bulk update a Suburb Field in the Family Files.

Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



You can Add or Remove families from the selected suburb, and suburb information can be modified for either the Residential Suburb or the Postal Suburb.

Format Fields

For the selected Families that you have tagged, you can update the Character Formatting for Surname, Given Name, Residential and Postal Address. Options available are shown below on the Postal Address Drop Down list...

Format Fields...

Surname

Given Name

Residential Address

Postal Address

- None
- First letter only upper case
- Upper Case
- Lower Case

Reports

Reports lets you output tagged people to any Pastoral Care report. All reports including Custom Reports and Custom Letters and all standard built in reports and a Manual report are all available.

See [Pastoral Care Reports Master List](#) for information on all the reports available in Pastoral Care.

Tag Individuals or Families

If you use Tag Individual, only the person you tick will be tagged, if you select Tag Family, all family members will be tagged if you tag one family member.

Tag Individual Tag Family

Add / Remove

If these options are available in the Tagging area, then choosing ADD will set tagging to add people to a selected item. If REMOVE is selected, tagged people will be removed from a selected item. Some options in Tagging are ADD only, and when this is the case, the Add / Remove options shown above will be missing from the Tagging Window.

Add Remove

Available People

This list shows the people you have loaded for use in the Tagging area.



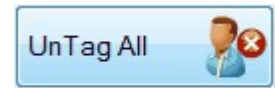
Tag All

Press this button to tag all people visible in the [Available People](#) list.



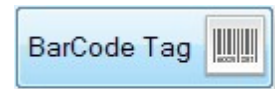
Un Tag All

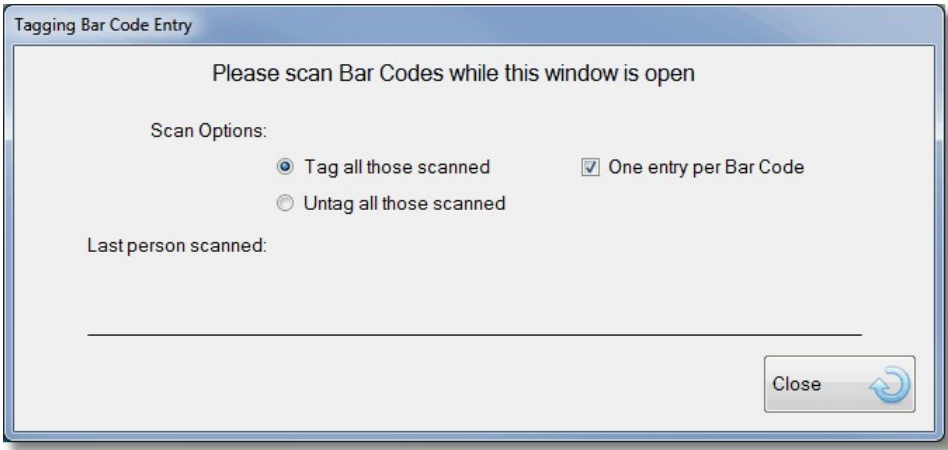
Press this button to un-tag all people visible in the [Available People](#) list.



Bar Code Tag

Press this button to open the Bar Code scan window letting you tag people that you scan from a Bar Code.





School Year Manager

In the Family File, you have the ability to add a School Year Level value to each individual in your database. This is often a great tool for managing children in a Sunday School / Junior Church program as these programs are often linked to School Year Level.

The School Year Manager simply allows a simple mechanism to increment everyone on your database up by 1 year. This is not automatically done, you must start the School Year Manager from the Explore Tab on the main menu.



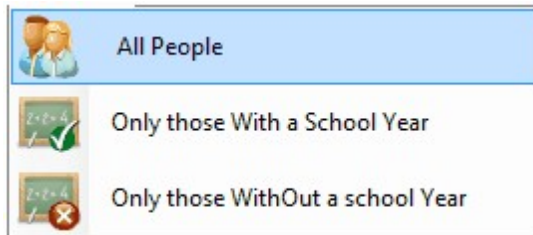
Click on each part of the School Year Manager below to learn more. (This window is shown with some sample data loaded.)

Surname	Given	Year
Angel	Helen	5
Anglin	Mathew	6
Anglin	Levi	7
Anglin	Kerryn	9
Barton	Ernie	3
Barton	Karren	4
Blackeby	Heather	5
Blackeby	Frank	3
Brown	Joshua	9
Brown	John	11
Collins	Stephen	12
Dimsey	Dodie	3
Dimsey	Mandy	3
Gordan	Wendy	5
Gordan	James	6
Kean	Nathan	7
Kean	Jannet	8
Knight	Mathew	9
Leah	Nathan	3
Leah	Leanne	2
Lynch	Mandy	1
Morton	Paula	9
Morton	Christine	1
Read	Andrew	2
Read	Sophie	3

School Year Manager Toolbar



Choose from any of the load options presented to you to load in the people that you want to work with in managing their School Year.



Use Filters to further refine the people that are loaded. See [Filters](#) for information on using Filters in Pastoral Care.



Save any changes to the School Year information. If you exit this area without pressing save, all changes will be lost.

Names List


The list of names and School Years allows you to quickly see what years are assigned to people. You can edit a School Year entry here by simply clicking on the year cell that you want to edit. Pressing Save on the toolbar will save any changes you have made before exiting this area.

Surname	Given	Year
Knight	Mathew	9
Brown	Joshua	9
Anglin	Kerryn	9
Morton	Paula	9
Kean	Jannet	8
Anglin	Levi	7
Kean	Nathan	7
Gordan	James	6
Anglin	Mathew	6
Angel	Helen	5
Blackeby	Heather	5
Gordan	Wendy	5

Manual Settings

Manual Settings

School Year

Add to All 


Use the Manual Settings to add a School Year of one set value you all people showing in the [Names List](#).

Automatic Increment

This is the most widely used feature of the School Year Manager. Use this it automatically increment each person with a School Year value in their family file by 1. (Or what ever value you enter here)

Automatic Increment

Increment all those with a School Year by Year

Increment Now 

Remove Years

Use the Remove Years to option to tidy up all people who have gone beyond year 12. (Or what ever year you choose to clear those records from) This does not remove people from your database, it just clears their School Year record.

Remove Years

Remove all years greater than Year

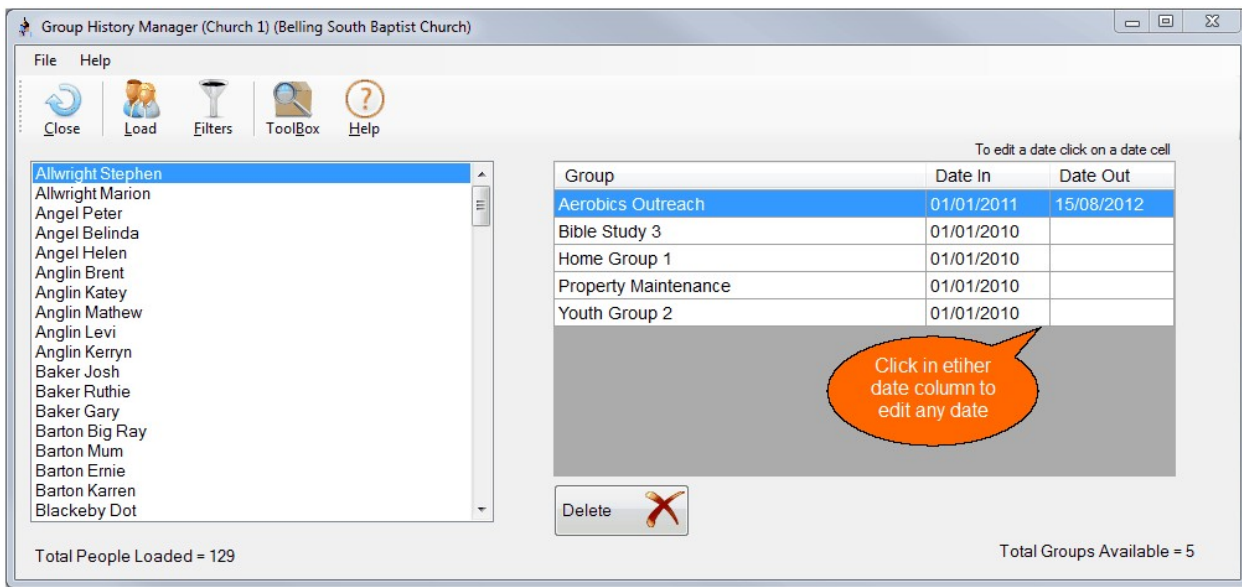
Remove Now 

Group History Manager

When you add a person to a group, or remove them from a group, Pastoral Care records the date that each of those events occurs on. The Group History Manager allows you to view the Date In and Date Out record of each person for the groups they belong to, and to edit this information if needed.

To use this feature, follow these simple steps.

- Step 1** Use the [Filters](#) toolbar button to select any groups
- Step 2** Press the Load button to load in all people that match your filter settings.
- Step 3** View the results of the load. (See Below)

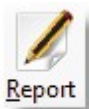
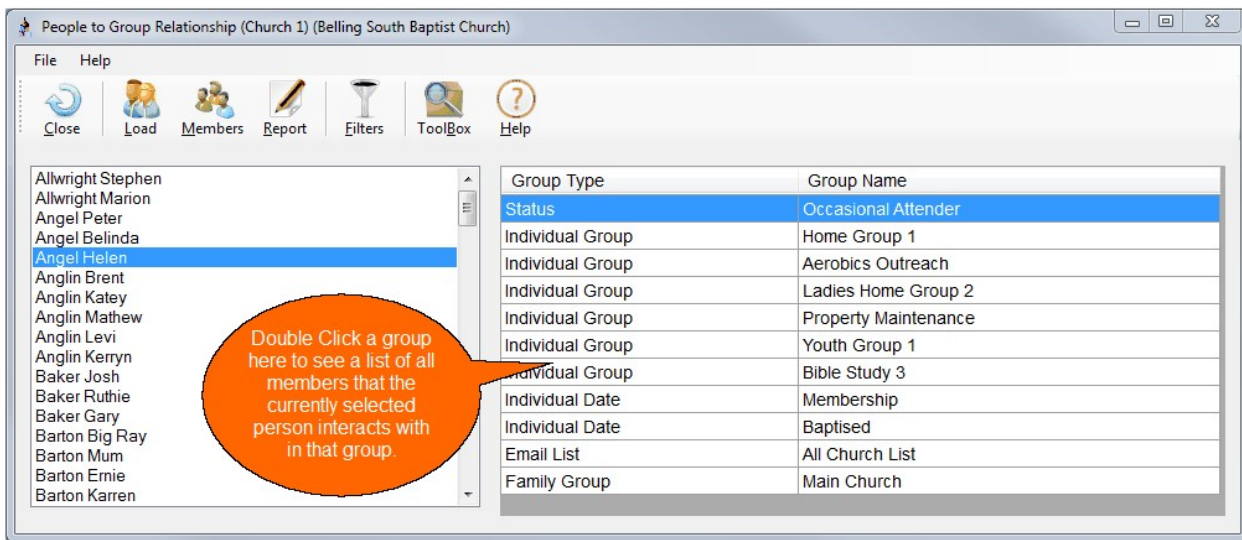


People to Group Relationship

The People to Group Relationship feature allows you to select an individual person, immediately view all the groups that person is involved in, and also let you see a list of other group members that the selected person interacts with in those groups.

To use this feature, follow these simple steps.

- Step 1** Use the [Filters](#) toolbar button to restrict the list of individuals that you want to view.
- Step 2** Press the Load button to load in all people that match your filter settings.
- Step 3** View the results of the load. (See Below)



Press the Report Button to see a report on the selected person. A sample report is shown below.

All Group Report for 'Angel Helen'

Group Type	Group Name
Status	Occasional Attender
Individual Group	Home Group 1
Individual Group	Aerobics Outreach
Individual Group	Ladies Home Group 2
Individual Group	Property Maintenance
Individual Group	Youth Group 1
Individual Group	Bible Study 3
Individual Date	Membership
Individual Date	Baptised
Email List	All Church List
Family Group	Main Church

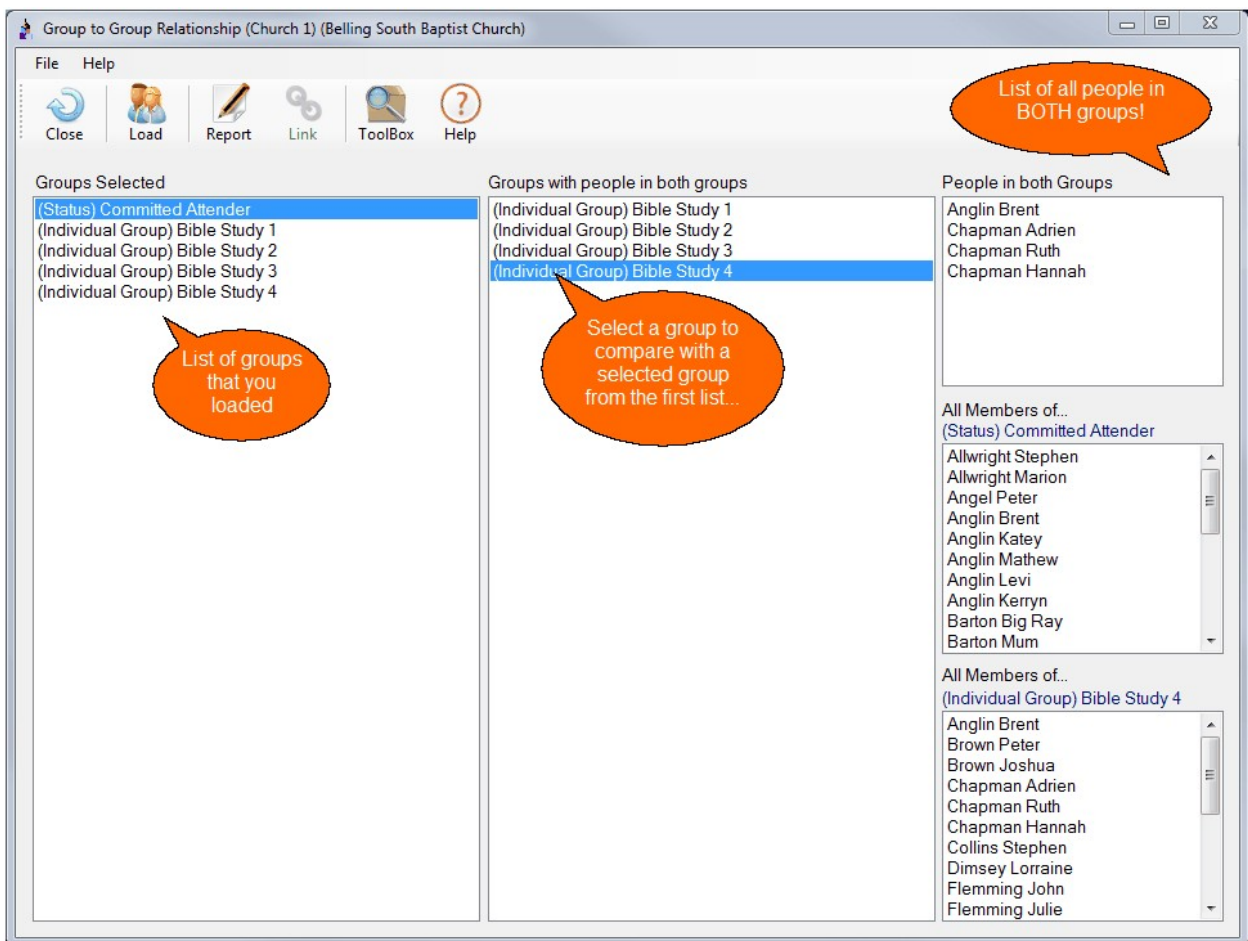
Group to Group Relationship

The Group to Group Relationship feature allows you to load in a range of selected groups, and immediately see the relationship that exists between those groups. That is, people that participate across a number of groups.

To use this feature, follow these simple steps.

Step 1 Press the Load button to open up the Group Selection window

Step 2 View the results of the load. (See Below)

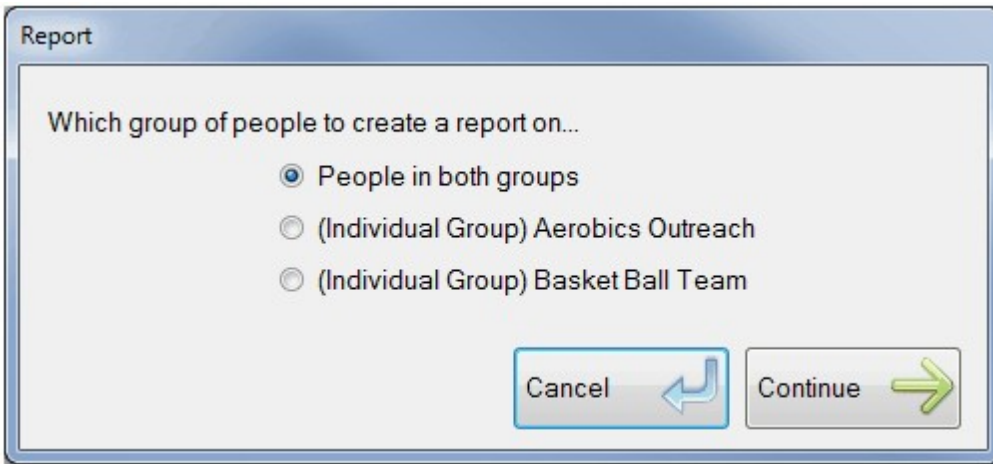


Report

Use the Report button to create a report on any of the following options:

- People Found in Both Selected Groups
- People found from the first selected group
- People found from the second selected group.

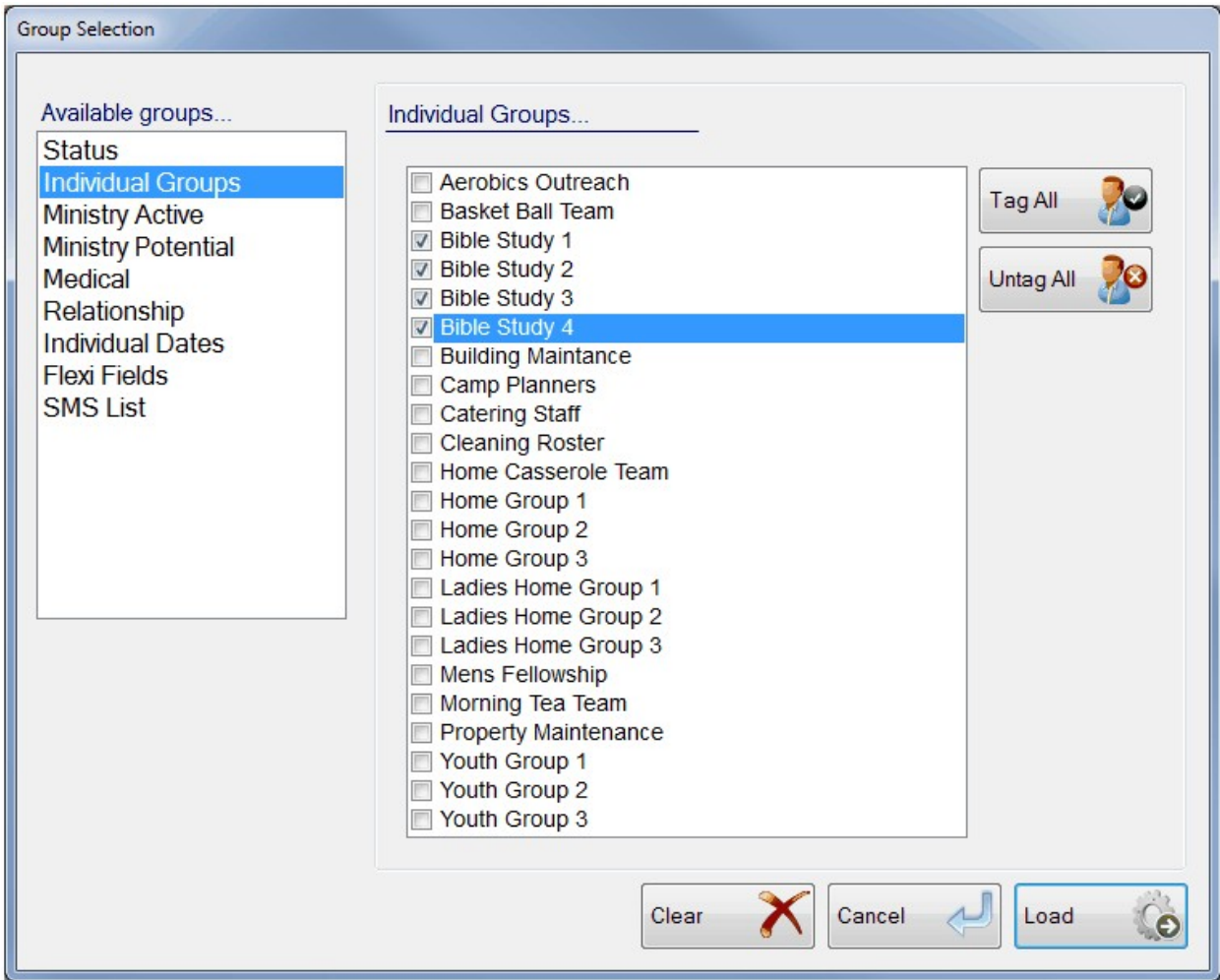
A sample window below is shown with the Report Search window to load people with any of the 3 options.



The actual report output depends on the report you select. This area does not have it's own report format, rather the people found in the search can be outputted to any standard Pastoral Care report, or any Custom Report designed by yourself.

Group Selection Window

Use the group selection window to select the groups that you want to analyse. All groups selected from the various group categories will be included in the analysis results.



Export

The Export feature of Pastoral Care allows you to output family data to other formats, as well as creating an export file for use with the [Pastoral Care Directory](#) program.

The export area is loaded from the Explore Tab on the main menu. There are 6 export streams, click on each stream for more information.

1. [Communicator Export](#)
2. [Directory Export](#)
3. [Family File Export](#)
4. [Mailing List Export](#)
5. [Weekly Statistics Export](#)
6. [SMS Global Mobile Upload File](#)

Communicator Export

The Communicator export can export selected SMS lists and Email lists in a format that can be read / imported into the [Pastoral Care Communicator](#). Simply tick the SMS Lists and Email Lists that you want to export to the Communicator program, and optionally add a Password to the export file.



Then press the Process button to save the export as a file ready for use.

SMS List	Email List
<input checked="" type="checkbox"/> Leadership List	<input type="checkbox"/> Leadership List
<input type="checkbox"/> Youth List	<input type="checkbox"/> Youth List
<input type="checkbox"/> All Church List	<input type="checkbox"/> All Church List
<input type="checkbox"/> Sample	

Secure export file with a password

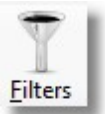
Directory Export

The Directory export can export selected Families in a format that can be read / imported into the [Pastoral Care Directory](#). Simply tick the options for the export file that you want to include (see below for more details on the options) and optionally add a Password to the export file.

See also [Pin Memo](#), [Notices](#) and [Reports](#)



Then press the Process button to save the export as a file ready for use.



Use the standard [Filters](#) window to select people to include in the directory export.

Files to include in Directory export

<input type="checkbox"/> Title	<input checked="" type="checkbox"/> Include Portraits
<input checked="" type="checkbox"/> Gender	<input checked="" type="checkbox"/> Family Portrait 1
<input type="checkbox"/> Middle Name	<input checked="" type="checkbox"/> Family Portrait 2
<input checked="" type="checkbox"/> Other Surname	<input checked="" type="checkbox"/> Family Portrait 3
<input checked="" type="checkbox"/> Birth Date	<input checked="" type="checkbox"/> Individual Portraits
<input checked="" type="checkbox"/> Residential Address	<input checked="" type="checkbox"/> Include Pin Memo
<input checked="" type="checkbox"/> Postal Address	<input type="checkbox"/> Edit 'Pin Memo'
<input checked="" type="checkbox"/> Family Phone	<input checked="" type="checkbox"/> Display 'Pin Memo' when 'Directory' starts
<input type="checkbox"/> Family Email	<input checked="" type="checkbox"/> Include Notice
<input type="checkbox"/> Family Mobile	<input type="checkbox"/> Edit 'Notice'
<input type="checkbox"/> Family Fax	<input checked="" type="checkbox"/> Include Reports
<input checked="" type="checkbox"/> Personal Mobile	<input type="checkbox"/> Add Reports
<input checked="" type="checkbox"/> Personal Email	
<input type="checkbox"/> Business Phone	
<input type="checkbox"/> Business Email	
<input type="checkbox"/> Business Fax	
<input type="checkbox"/> Occupation	

Secure export file with a password

Fields

Tick the fields that you want to include in the Directory Program export file.

Include Portrait's

Tick this to include selected portrait's (photos) in the Directory Program export file.

Include Pin Memo

Tick this option to include a Memo for people to see who use the Directory Program. Press the Edit Pin Memo button to write your short message.

Include Notice

Tick this option to include a Notice for people to see who use the Directory Program. Press the Edit Notice button to write your notice to be distributed.

Include Reports

If you have saved any reports that you want to distribute to church members by the Directory Program, tick this option and press Add Reports to include any saved reports in the export file.

Pin Memo

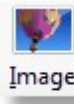
The information you type in here can be automatically displayed on the [Pastoral Care Directory](#) Program each time it starts. Simply type in your message and press Close to save your message making it available for exporting with the Directory Program Export.



Access the Spell Checker Settings



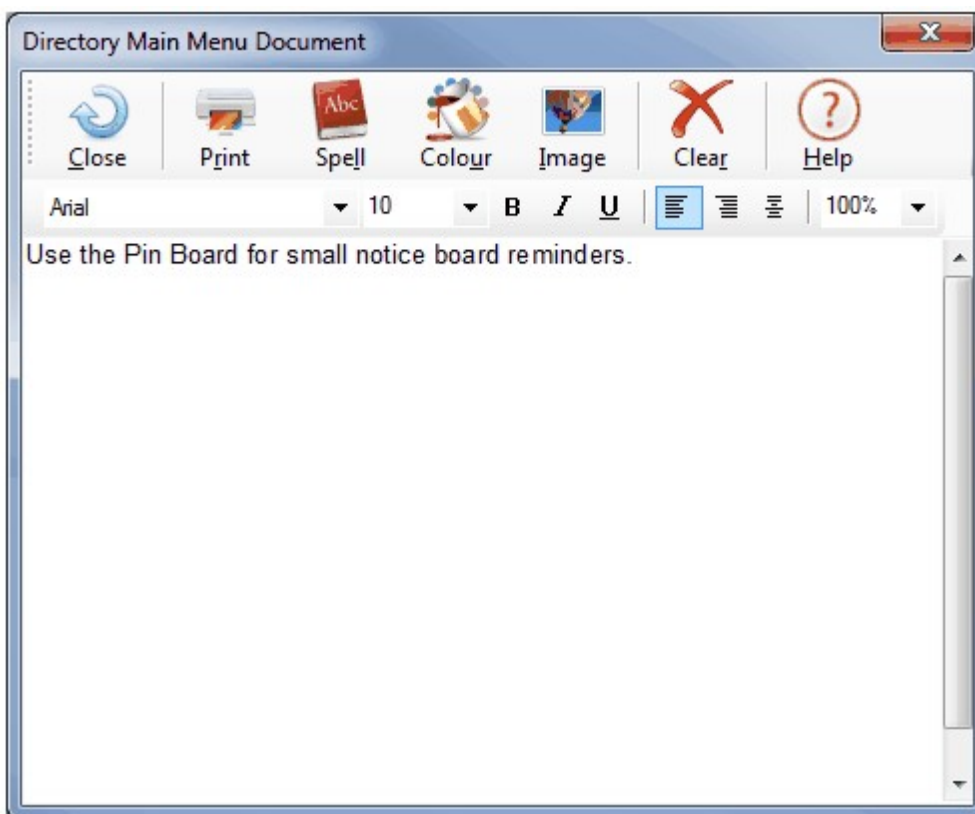
Set the Text and Text Background colours for the selected text.



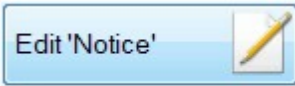
Use the Image button to load in a sizable image into the Pin Memo.



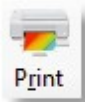
Use the Clear button to totally erase the Pin Memo.



Notices



Press the Edit Notice button to take you to the Notice Editor. A Notice when exported to the directory program becomes visible to the people using the Directory Program.



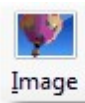
Print a copy of the notice.



Set the Text and Text Background colours for the selected text.



Search through the notice for text



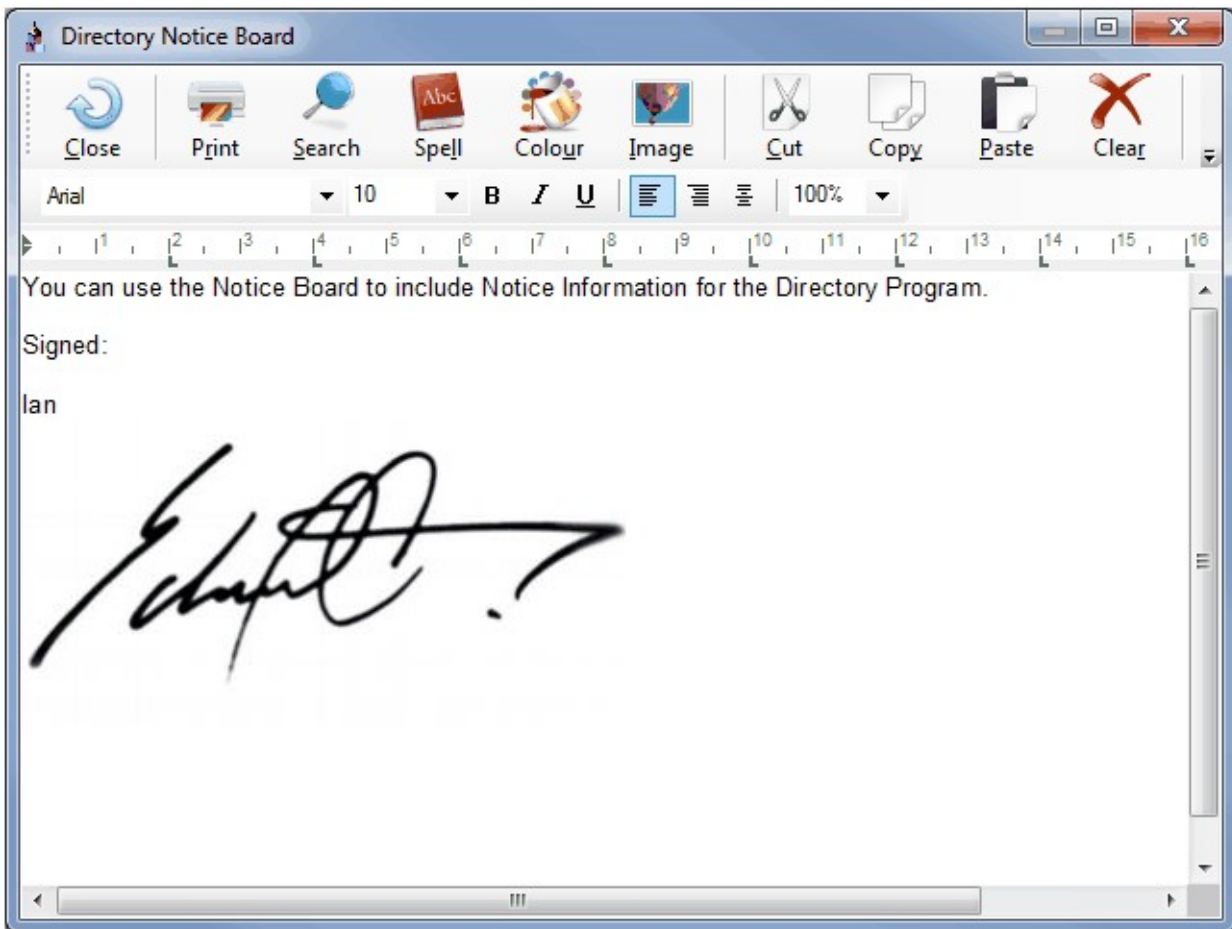
Use the Image button to load in a sizable image into the Pin Memo.



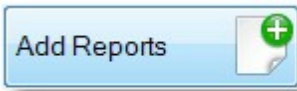
Access the Spell Checker Settings



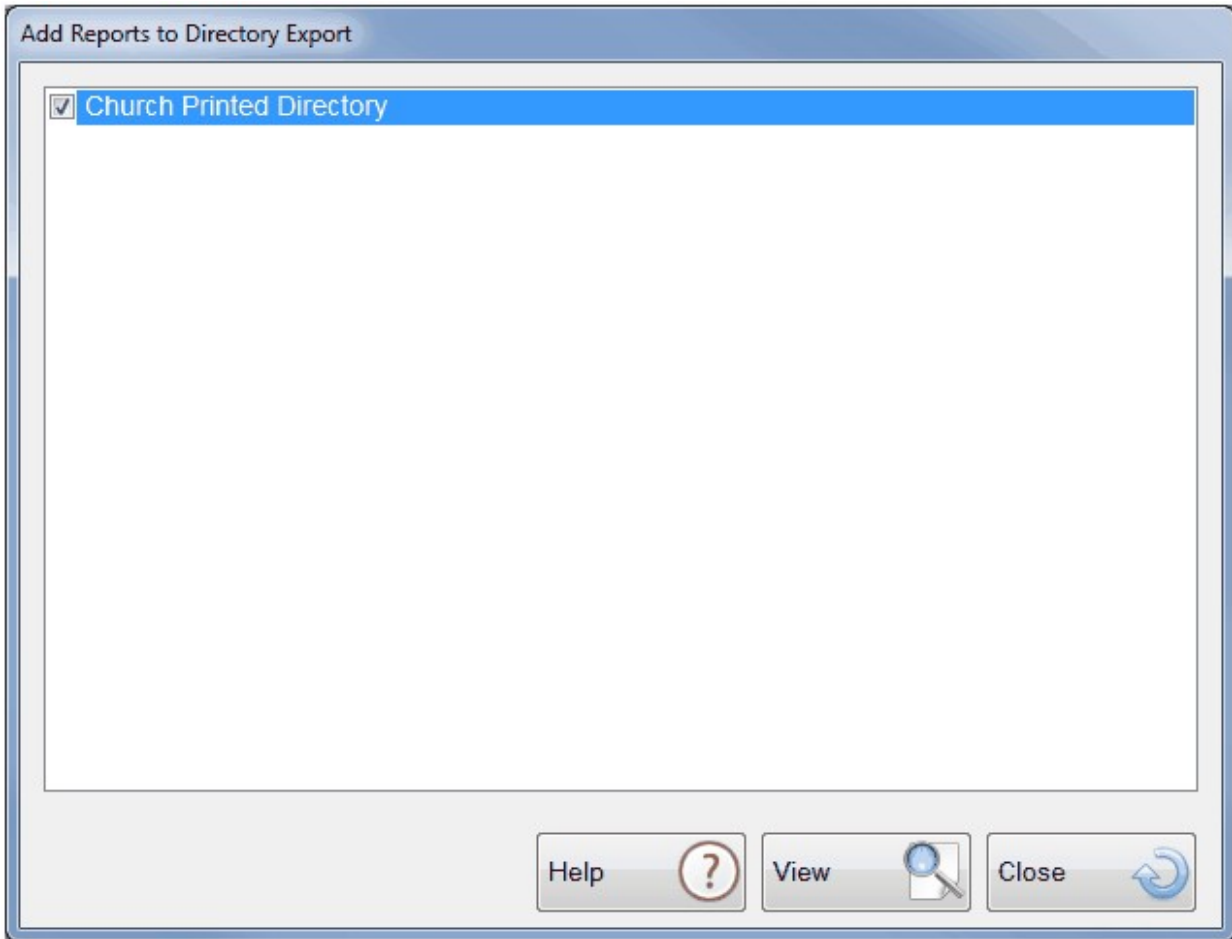
Use the Clear button to totally erase the Pin Memo.



Reports



Press the Add reports button to load the Add Reports Window. If you have saved any reports for including in the Directory Program, they will be listed here. Simply tick the report that you want include with export for people to have access to those report(s).



Family File Export


The Family File export can export selected Families in a format that can be read / imported into other third party programs, such as spreadsheets. Simply tick the options for the export file that you want to include (see below for more details on the options) and optionally add a Password to the export file.



Then press the Process button to save the export as a file ready for use.



Use the standard [Filters](#) window to select people to include in the directory export.

<ul style="list-style-type: none"><input checked="" type="checkbox"/> Title<input checked="" type="checkbox"/> Gender<input checked="" type="checkbox"/> Middle Name<input checked="" type="checkbox"/> Other Surname<input checked="" type="checkbox"/> Birth Date<input checked="" type="checkbox"/> Residential Address<input type="checkbox"/> Map Reference<input checked="" type="checkbox"/> Postal Address<input type="checkbox"/> Family Phone<input type="checkbox"/> Family Email<input type="checkbox"/> Family Mobile<input type="checkbox"/> Family Fax<input checked="" type="checkbox"/> Personal Mobile<input checked="" type="checkbox"/> Personal Email<input type="checkbox"/> Business Phone<input type="checkbox"/> Business Email<input type="checkbox"/> Business Fax<input type="checkbox"/> Occupation	<ul style="list-style-type: none"><input checked="" type="radio"/> Comma separator<input type="radio"/> Comma & quote separator <hr/> <ul style="list-style-type: none"><input checked="" type="radio"/> Export birth date as actual date<input type="radio"/> Export birth date as a serial number <p>Remap Export Fields </p>
---	--

Comma Separator

Sample Export example: Name, Address, Suburb

Comma and Quote Separator

Sample Export example: "Name", "Address", "Suburb"

Export Dates as Actual Date

Sample Export example: 02/01/2008

Export Date as Serial Number

Serial dates are a number only format useful mostly in Spreadsheets for formatting dates as you need them.

Remap Export Fields

See [Remap Export fields](#)

Remap Export fields

Use these fields to change the field names used in the export file to something other than Pastoral Care field names. The example below are field names entered for use in Outlook 2010. If you are using a different version of Outlook, do a Google Search for Outlook 2003 Field Names (Use your version number in place of 2003) . That web search should help you find the field names that are best to use with your version of Outlook.

Remap Export Field Names

Surname <input type="text" value="Last Name"/>	Postal Postcode <input type="text"/>
Given <input type="text" value="First Name"/>	Postal State <input type="text"/>
Gender <input type="text" value="Gender"/>	Postal Country <input type="text"/>
Birth Date <input type="text" value="Birthday"/>	Family Phone <input type="text" value="Home Phone"/>
Title <input type="text" value="Title"/>	Family Mobile <input type="text"/>
Middle Name <input type="text" value="Middle Name"/>	Personal Mobile <input type="text"/>
Other Surname <input type="text"/>	Business Phone <input type="text"/>
Residential Street Line 1 <input type="text" value="Home Street"/>	Family Fax <input type="text" value="Home Fax"/>
Residential Street Line 2 <input type="text" value="Home Street 2"/>	Business Fax <input type="text" value="Business Fax"/>
Residential Suburb <input type="text" value="Home City"/>	Family Email <input type="text"/>
Residential Postcode <input type="text" value="Home Postal Code"/>	Personal Email <input type="text" value="E-mail Address"/>
Residential State <input type="text" value="Home State"/>	Business Email <input type="text"/>
Residential Country <input type="text" value="Home Country/Region"/>	Occupation <input type="text"/>
Postal Street Line 1 <input type="text"/>	Map No. <input type="text"/>
Postal Street Line 2 <input type="text"/>	Map Ref. <input type="text"/>
Postal Suburb <input type="text"/>	

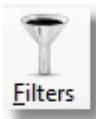
Mailing List Export

The Mailing List export creates a file of Names and Address information for use in another program for mail merge. If you are considering doing this, have a close look at [Custom Letter Writer](#), this feature of Pastoral Care provides built in mail merge with superior filter integration and data smarts to make your letters a snap to create.

Simply tick the options for the export file that you want to include (see below for more details on the options)



Press the Process button to save the export as a file ready for use.



Use the standard [Filters](#) window to select people to include in the directory export.

Format Options

Let Pastoral Care format your data for Family Orientation, or Individual Orientation. Family output will create a file with one family per line, Individual Output will create a file with each individual person on a line.

A dialog box titled "Export Mailing List by...." with four radio button options. The first two options are "Individual Format" and "Family Format". A horizontal line separates them from the next two options: "Comma separator" and "Comma & quote separator". The "Individual Format" and "Comma separator" options are selected.

Export Mailing List by....

Individual Format

Family Format

Comma separator

Comma & quote separator

Weekly Statistics Export

If you use the [Weekly Statistics](#) feature of Pastoral Care, this export area allows you to export the Weekly Statistics data for use in another program, such as a spreadsheet.



Click on each part of the Weekly Export options below to learn more.

Weekly Project Sunday main

Financial

- AM Offering
- S/S Offering
- Building Fund
- Community Chest
- O/S Missions
- Local Missions

Attendance

- Morning AM1
- Morning AM2
- Evening
- Home Group 1
- Home Group 2
- Home Group 3
- Baptised
- Born Again
- Membership

Export Date Options

Calendar Year Year 2012

Financial Year From 20/05/2009

Date Range To 16/09/2012

01/01/2012 to 31/12/2012

Export date as actual date

Export date as a serial number

Comma separator

Comma & quote separator

Select Project

Weekly Project Sunday main

Select the Weekly Statistics Project that you want to export from.

Financial

Select any or all of the financial categories to export to your Weekly Statistics Export File.

Financial

- AM Offering
- S/S Offering
- Building Fund
- Community Chest
- O/S Missions
- Local Missions

Attendance

Select any or all of the Attendance categories to export to your Weekly Statistics Export File.

Attendance

- Morning AM1
- Morning AM2
- Evening
- Home Group 1
- Home Group 2
- Home Group 3
- Baptised
- Born Again
- Membership

Export Date Options

Export Date Options

Calendar Year Year 2012

Financial Year From 20/05/2009

Date Range To 16/09/2012

01/07/2012 to 30/06/2013

Select the date range options for the export file to be created from.

Calendar Year is January 1 to December 31 for the selected year.

Financial Year is July 1 of the selected year ending on 30th June of the next year

Date Range is simply a manually selected From and To date.

Export Date Format

- Export date as actual date
- Export date as a serial number

If you are exporting from Weekly Statistics for use in a spreadsheet, the best format to use is Serial Number export for the date field. In your spreadsheet program, the dates will come up as a number, just use formatting to convert the visual of those fields to display as a date.

File Format

- Comma separator
- Comma & quote separator

Choose the format that suit's your needs best. We suggest Comma and Quote Separator files for maximum reliability in general.

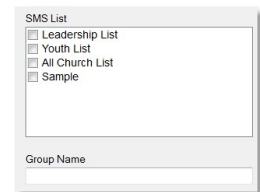
SMS Global Mobile Upload File

SMS Global have an import feature allowing you to import your contacts to your own list.

This export option will allow you to select a SMS List that you have setup in Pastoral Care, and save that in a format ready for uploading to SMS Global for a contact list.

This gives you the ability to send SMS messages directly to a list of contacts via a web page, without needing Pastoral Care running. (Use your account by logging into www.smsglobal.com)

Simply Select the SMS list by ticking it, and enter a Group Name that you want to call that list on the SMS contacts area, and press the Process button on the toolbar to create the file.



SMS List

- Leadership List
- Youth List
- All Church List
- Sample

Group Name

Pastoral Care 12

Pastoral tools for todays church.

Chapter 10

Utilities Tab



(c) 1988-2013 PASTORAL CARE MINISTRIES

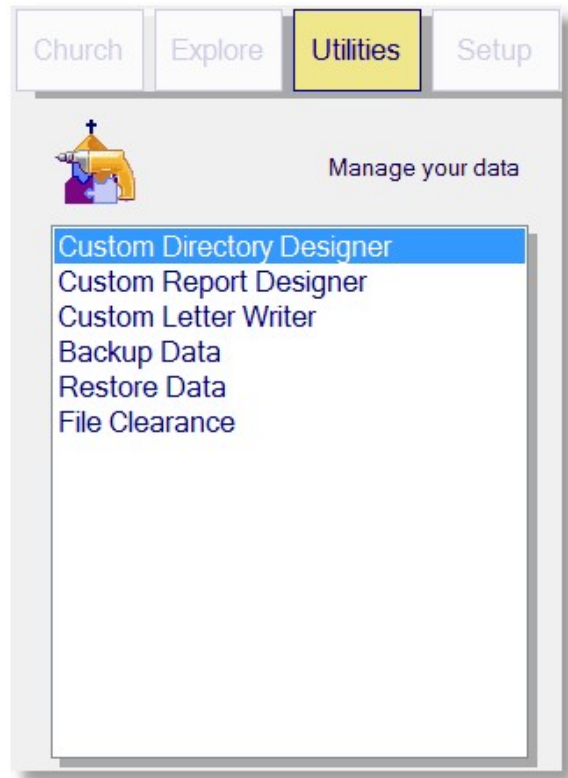
Utilities Introduction

Welcome to the Utilities Tab. This Tab gives you access to some of our advanced Custom Report creation tools and the all important Backup and Restore utilities.



Click on each Utilities menu item shown right to find out more about each area.

See also [Why Use Custom Report Utilities?](#)



Why Use Custom Report Utilities?

Introduction

Over the many years we have been building Pastoral Care, and the many years of designing database systems for companies around Australia, we have come to learn the importance of accurate reporting. Accurate and on time reporting can only be achieved by using a good database system to manage your data, and then report directly from that original database - no fiddling!

Picture Perfect Reports Vs Data Perfect Reports

If you are using a third party graphics / page design software to produce your church directory and or other reports, please consider stopping that practice now! Not only will it take you many weeks of hard work to produce a church directory, it won't and can't be accurate at the time of publishing. Not only does your data change as you are working on it, but you may / will make mistakes. Even a Typo can have dire consequences!

Picture Perfect Reports just waste far too much time, and is it really that important to have your church directory exactly the same as it has been for the last 20 years? Why not try something new!

Our reports are **data perfect!** They represent exactly what is in your database. If there is a mistake, it's in the database, and once fixed, will stay fixed.

Design your own with Custom Utilities

You can design your own new Church Directories, including A5 Double Sided ready to fold from A4 paper! YES, we now do booklets at the push of a button. [Custom Directory Designer](#) and [Custom Report Designer](#) are two powerful report writing tools. They are not Graphic Design Tools, or Page Layout Tools, they are Report Writing Tools. this is just what you need for ACCURATE, RELIABLE and REPEATABLE reports.

After you have designed your church directory, how long will it take to produce the second church directory? Click.... Print... Done!

Managing Custom Reports

When you are saving Custom Reports, and Custom Directories (and Custom Letters), be careful about the names you select for them as you save them. The names that you save them as determines the placement of them in each category in the [Pastoral Care Reports Master List](#).

If you create a heap of Custom Reports, try and work out a good naming convention to follow so that like reports are grouped together. For Example, administration reports could be admin-Roll-Master, Pastors Reports could be ps-WelcomeLetter. IE: Start each file name with a category and a dash, then the name of the report. This way all the reports in the master listing will be ordered at least by category or department!

Custom Directory Designer

Introduction

New to Pastoral Care 12, this is an exciting addition to Custom Report Designer from earlier versions of Pastoral Care. Not only has [Custom Report Designer](#) being totally rebuilt in a slick and easy to use interface, we have added this new feature to make designing your own Church Directory so much easier than before.

Concept

The concept behind **Custom Directory Designer** was to open up the power of designing your own Church Directory, but keeping it very simple at the same time.

Even a novice will be able to use this program, and for the advanced user, you can create a simple Church Directory in this area, and import it later into [Custom Report Designer](#) for even more control and advanced editing features.

Design your own
Church Directories with
ease!



Starting Custom Directory Designer

To start the Custom Directory Designer, select the Utilities Tab from the Main Menu, and double click on the Custom Directory Designer.

Each time Custom Directory Designer starts, it opens up with a wizard design tool letting you quickly select the information you want to add to a new report design, or you can choose to load in one you have already created.

See [Custom Directory Starter Window](#) for getting started with Custom Directory Designer

How can I print my Custom Directory?

See [How to Use a Custom Report](#) for full details on how you can use / print your Custom Directory once you have created it!

Custom Directory Starter Window

(For a general introduction to Custom Directory, see [Custom Directory Designer](#).)

Starter Window

Shown below is the Starter Window for Custom Directory Designer. This window opens every time you start this feature. It allows you to either load an existing Custom Directory, or to alternatively create a new Custom Directory.

To see the Custom Directory Design window and learn more about layouts and object properties, see [Sample Design Layout](#)



Click on each part of this window to learn more about this feature.

Church Directory Startup

Paper size to produce the Church Directory on...

A4 Portrait
 A4 Landscape
 A5 Booklet

When creating a A5 Booklet the report will be designed as an A4 portrait report that will automatically be shrunk to A5 when the Booklet print option is chosen from the Report Viewer.

Objects to include in the Church Directory...

<input type="checkbox"/> Surname	<input type="checkbox"/> Address
<input type="checkbox"/> Adult names combined	<input type="checkbox"/> Family Details
<input type="checkbox"/> Primary adult name	<input type="checkbox"/> Personal Details
<input type="checkbox"/> Secondary adult name	<input type="checkbox"/> Portrait
<input type="checkbox"/> Children names	

Objects contain the family data fields within the report, they can be moved around to be placed exactly where you want to display them. Each Object has their own unique Properties to format the behavior of the object.

Other Options...

Add Title to adult given name
 Add alphabetical letter separators

Arial 16

Bold Italic Underline

location left Middle Right

 Black

Load an Existing Church Directory

Available 'Church Directories' <div style="border: 1px solid #ccc; height: 60px;"></div>	Templates <div style="border: 1px solid #ccc; height: 60px;"></div>
---	--

Help

Cancel

Create

Page Options

There are 3 different page options available for a Church Directory. When designing a directory, you need to decide the page size carefully.

Adobe PDF directory

If you are going to produce the directory in a PDF format for electronic distribution, A4 Portrait is probably the best page size to choose, as it will be easiest for most people to print out.

Printed Directory

If you are going to print your directory for physical distribution, then you can choose which ever page layout suit's you.

Options Available

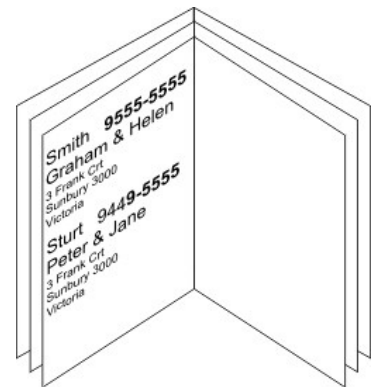
A5 Booklet Layout

Choose this option if you want to produce a double sided ready to fold and assemble A5 booklet from A4 paper, directly from your printer.

Pastoral Care will do all the formatting and page layout to create this automatically!

if you select this option, you will be presented with a A4 template ready to design. You need to design your page as an A4 page, bearing in mind that this will be shrunk 50% to fit on an A5 size page.

A5 booklet printing is done from the [The Report Viewer](#) at the time of printing. You will need to use the Booklet Printing Option found in the report viewer (Select Print - Booklet from the report viewer toolbar)



A4 Portrait

This is a standard A4 portrait page layout.

A4 Landscape

This is a standard A4 Landscape page layout. Do not use this to try and create a Booklet A5 output. This output is designed only for A4 landscape.

Objects

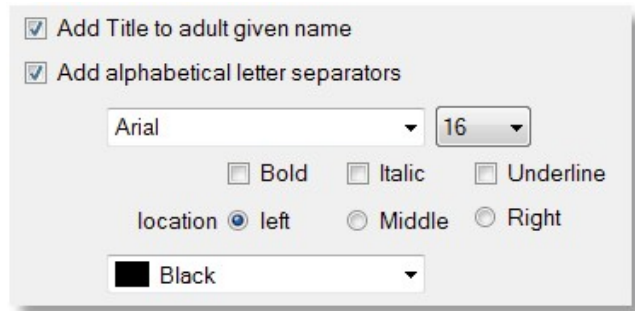
When selecting the objects for your Church Directory, you need to worry if you have selected too many, or not enough! You can add more objects later, or delete some that you have decided you don't need. For learning, try all objects and see what is produced!

To see the Custom Directory Design window and learn more about layouts and object properties, see [Sample Design Layout](#)

Object	Data Field	Properties
<input checked="" type="checkbox"/> Surname	Family Surname field.	Fonts, Colour, Shading, Alignment, Auto Size Options
<input checked="" type="checkbox"/> Adult names combined	Primary and Secondary Adult Names	Fonts, Colour, Shading, Alignment, Auto Size Options
<input checked="" type="checkbox"/> Primary adult name	Primary Adult Name	Fonts, Colour, Shading, Alignment, Auto Size Options
<input checked="" type="checkbox"/> Secondary adult name	Secondary Adult Name	Fonts, Colour, Shading, Alignment, Auto Size Options
<input checked="" type="checkbox"/> Children names	Children's Names	Fonts, Colour, Shading, Alignment, Auto Size Options, Horizontal Names Layout or Vertical Names Layout
<input checked="" type="checkbox"/> Address	Address Fields for a complete address. Postal, Street or Both, options for including State, Country and Map References	Fonts, Colour, Shading, Alignment, Auto Size Options. Field selection and Field Order
<input checked="" type="checkbox"/> Family Details	Fields available are: Residential Phone, Fax, Email and Mobile, all selectable in properties	Fonts, Colour, Shading, Alignment, Auto Size Options, Field selection and Field Order
<input checked="" type="checkbox"/> Personal Details	Almost all Personal Details fields are available	Fonts, Colour, Shading, Alignment, Auto Size Options, Field selection and Field Order
<input checked="" type="checkbox"/> Portrait		

Other Options

Tick to add a Title to an Adults Name, or Tick the Alphabetical Separators option to insert A,B,C etc for visually separating each Alphabetical Position based on surname. (See Sample Below). You can use the font options on this area for setting the font, position and colour of the Alphabetical Separators.



Sample Alphabetical Separator



Load Existing

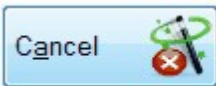
Tick the Load an Existing Church Directory to be able to select a Directory you have already designed, or a Template that has been distributed via Pastoral Care Software.

Templates are Custom Reports that we have designed to assist you in either learning how to design your own templates, or simply using some of our designs!

Load an Existing Church Directory

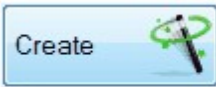
Available 'Church Directories'	Templates
Sample Full sample	

Cancel



Press Cancel to stop using the Create Custom Directory starter window.

Create



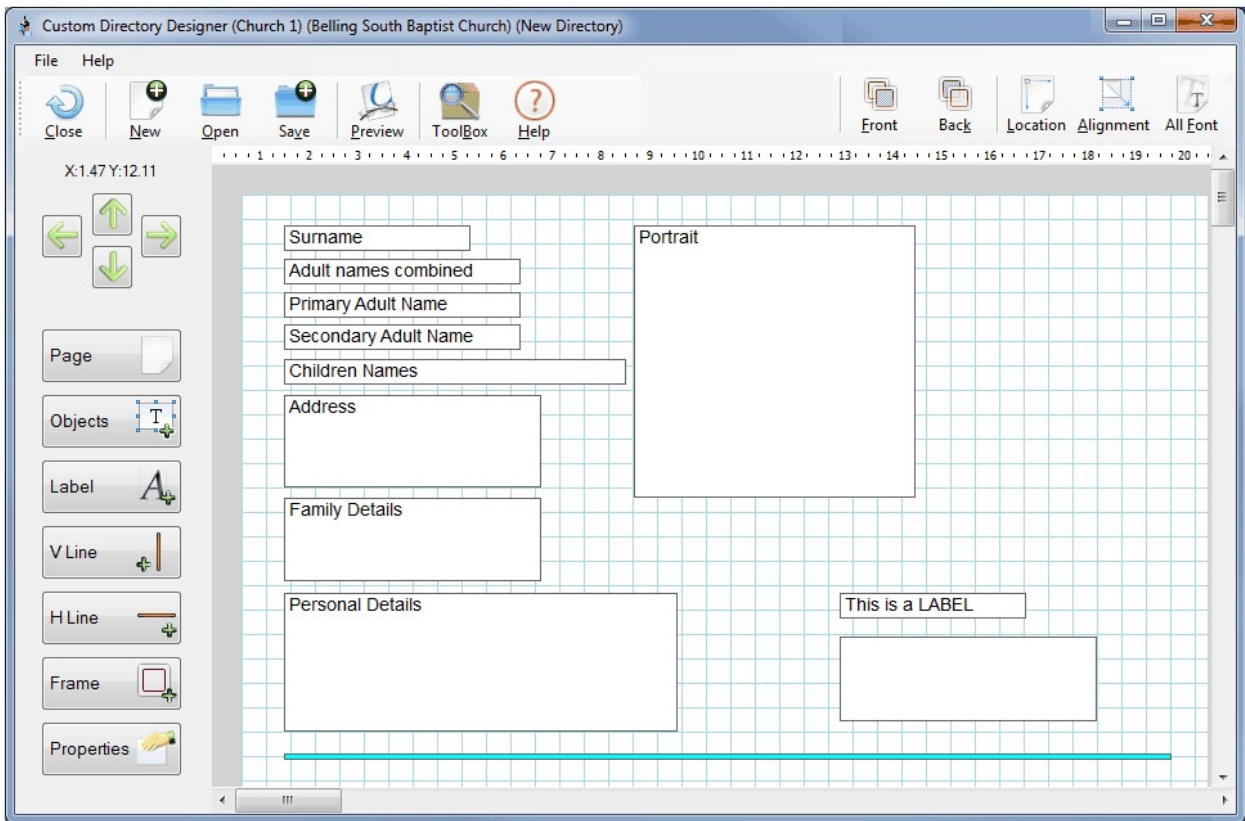
Press Create to create a Custom Church Directory based on the [Objects](#) you have selected to include on that directory.

Sample Design Layout

Shown below is the Custom Directory design window with all objects available on the window. This was created by simply ticking all [Objects](#) on the [Custom Directory Starter Window](#) and pressing the create button!



Click on each object and button to see all controls and properties that will assist you in creating your own church directory.



Toolbar

Shown below are each of the Toolbar buttons for the Custom Directory Designer.



Press New to start creating a new Custom Directory from scratch.



Bring the selected object in front of all other objects.



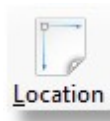
Press Open to select an already created Custom Directory to open for modification.



Send the selected object behind all other objects.



Press Save to save your Custom Directory. Saving makes your changes permanent, and makes your template available in all reporting areas of Pastoral Care.



Use [Location](#) to fine tune the size and position of the selected object.



Use [Preview](#) to take your custom Directory for a test drive!



Use the [Alignment](#) button to align the selected object to another object as well as bulk moving a range of objects.



Open the standard Pastoral Care [Toolbox](#)

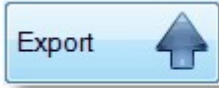


Use [All Font](#) to set the font on all objects to be the same font.

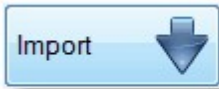
Open



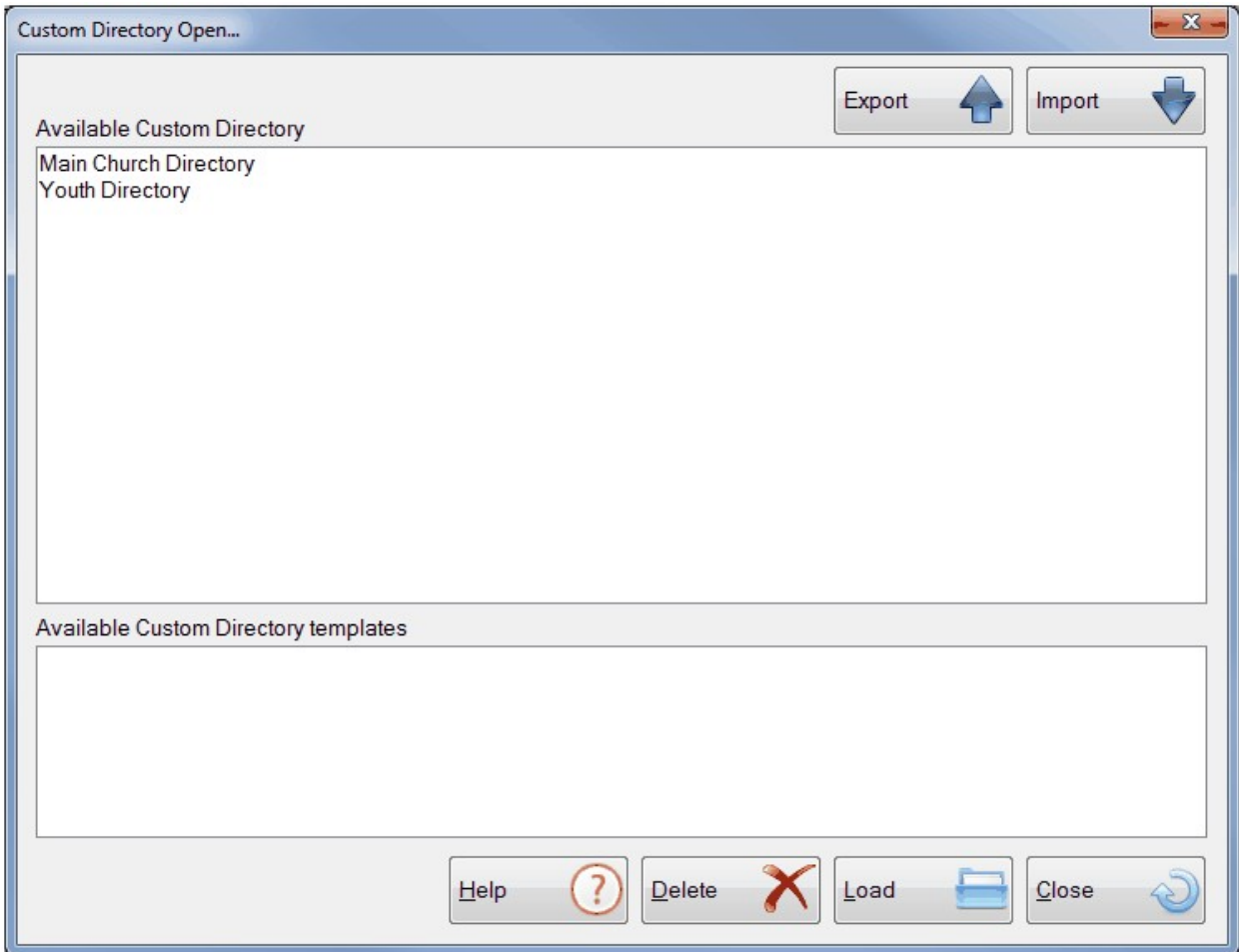
Press the Open Icon on the toolbar to select an already designed Custom Directory for editing.



Use the Export Button to create a file that another church can IMPORT for use in their Custom Directory area.



Use the Import Button to import a Custom Directory designed by someone else.



Preview



The Preview feature allows you to select a family, or a range of families / individuals for testing out your new Church Directory/ Custom Report. This is not the area to run your report from, rather it is just a preview / test drive.



Click on each part of the Preview Window below to learn more about this feature.

Preview
⌵

Active Families

<input type="checkbox"/> Allwright S & M	<input type="checkbox"/> Hanks J & M	<input type="checkbox"/> White F & H
<input type="checkbox"/> Angel P & B	<input type="checkbox"/> Harris D & A	
<input type="checkbox"/> Anglin B & K	<input type="checkbox"/> Heath J & A	
<input type="checkbox"/> Baker J & R	<input type="checkbox"/> Iles B & W	
<input type="checkbox"/> Barton B & M	<input type="checkbox"/> Jones C & W	
<input type="checkbox"/> Blackeby D	<input type="checkbox"/> Jury P & H	
<input type="checkbox"/> Blackeby & H	<input type="checkbox"/> Kean S & J	
<input type="checkbox"/> Brown P & H	<input type="checkbox"/> Klond P & J	
<input type="checkbox"/> Chapman A & R	<input type="checkbox"/> Knight M & S	
<input type="checkbox"/> Collins F & J	<input type="checkbox"/> Leah A & M	
<input type="checkbox"/> Dimsey R & L	<input type="checkbox"/> Lynch A & K	
<input type="checkbox"/> Dobber H & R	<input type="checkbox"/> McCoy D & B	
<input type="checkbox"/> Eadon J & E	<input type="checkbox"/> Morton P & J	
<input type="checkbox"/> Edwards D & H	<input type="checkbox"/> Nixon G & E	
<input type="checkbox"/> Flemming J & J	<input type="checkbox"/> Oliver B & F	
<input type="checkbox"/> French H & R	<input type="checkbox"/> Potter M & W	
<input type="checkbox"/> Gordan F & L	<input type="checkbox"/> Read M & A	
<input type="checkbox"/> Graham R & B	<input type="checkbox"/> Smith G & C	
<input type="checkbox"/> Gray P	<input type="checkbox"/> Taylor G & R	

Report Mode

Family Individual

Add titles to 'Given Names'

Allow page break in family details

Preview run amount

20 Families

Sample 'Title' text

Preview Family

Preview Tag

Preview Run

Help

Close

Family Filter

Select a Family Filter for running your preview on. For most people, Active Families as the default is perfect for this job!

Active Families

Select Families

If you want to run on a single family, or a few manually selected families, tag (tick) those families that you want to run the current Custom Directory / Report on.

<input type="checkbox"/> Allwright S & M	<input type="checkbox"/> Hanks J & M
<input type="checkbox"/> Angel P & B	<input type="checkbox"/> Harris D & A
<input type="checkbox"/> Anglin B & K	<input type="checkbox"/> Heath J & A
<input type="checkbox"/> Baker J & R	<input type="checkbox"/> Iles B & W
<input type="checkbox"/> Barton B & M	<input type="checkbox"/> Jones C & W
<input type="checkbox"/> Blackeby D	<input type="checkbox"/> Jury P & H
<input type="checkbox"/> Blackeby & H	<input type="checkbox"/> Kean S & J
<input type="checkbox"/> Brown P & H	<input type="checkbox"/> Klond P & J
<input type="checkbox"/> Chapman A & R	<input type="checkbox"/> Knight M & S
<input type="checkbox"/> Collins F & J	<input type="checkbox"/> Leah A & M

Report Mode

Choose to run your report preview in Family Mode, or Individual Mode.

Report Mode

Family Individual

Add Titles

Where they exist in your data, add a Title to each adult's given name on the report.

Add titles to 'Given Names'

Allow Page Break

Allow a page break within any family details being displayed on the report preview.

Allow page break in family details

Preview Run Amount

If you are going to do a Preview Run, that is a number of families, enter how many families you want to output to your report preview.

Preview run amount

20 Families

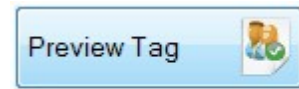
Preview Family

Pressing this button will only run the selected report template on the currently highlighted (no Tagged) family.



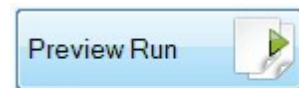
Preview Tag

Pressing this button will only run the selected report template on the currently tagged (not highlighted) families.



Preview Run

Press this button to let Pastoral Care preview the report template for the first x number of families it finds in your database.



Front

Bring the currently selected object to the front of the page, this makes this object cover any objects that might be overlapping.



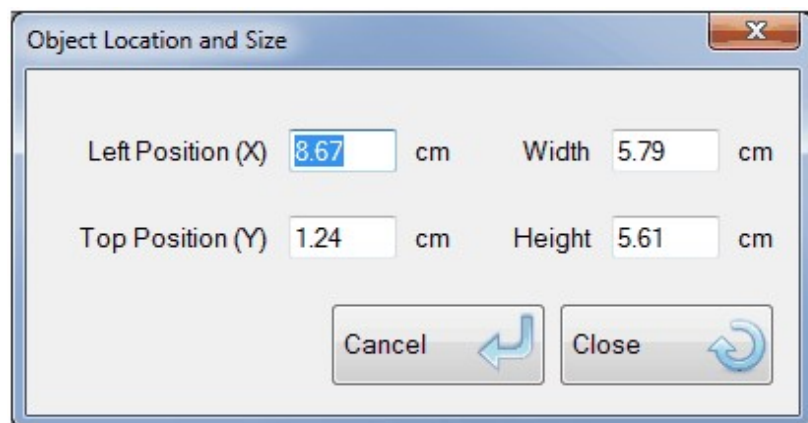
Back

Send the currently selected object to the back of the page, this makes this object sit behind or be covered by any overlapping objects.



Location

Use the Location window (shown right) to fine tune the size and position of the selected object.

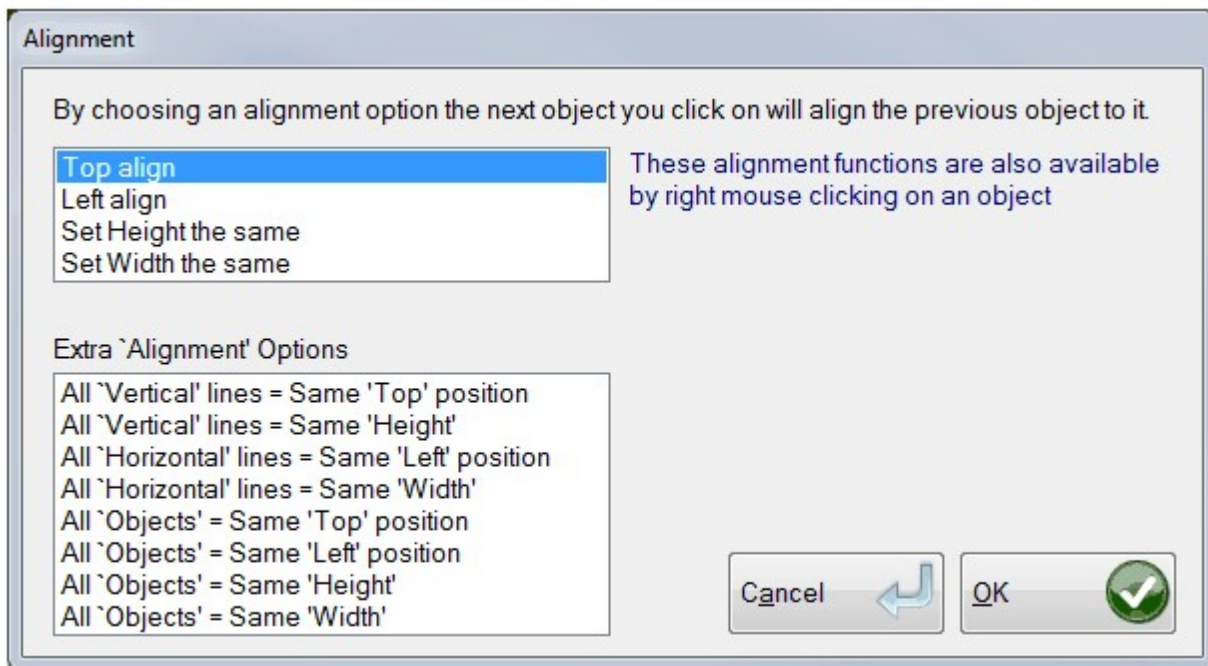


Alignment

Use the Alignment option to make a number of positional adjustments quickly. You should save your report before doing any large adjustments, as an Alignment action cannot be undone!

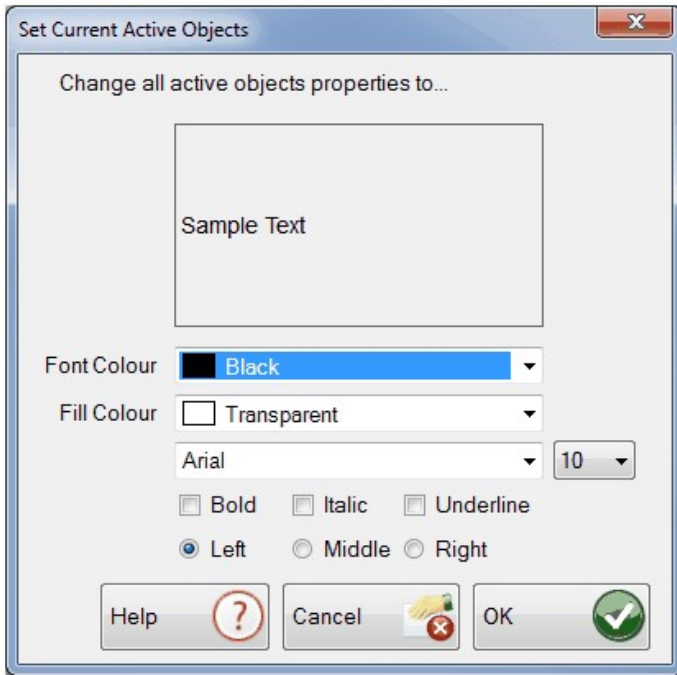
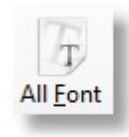
The first four options on this window are also available by Right Clicking on an object on the design area of the Custom Directory Designer.

To run any of the Extra Alignment Options, simply select one of the options, press OK and then click on an object.



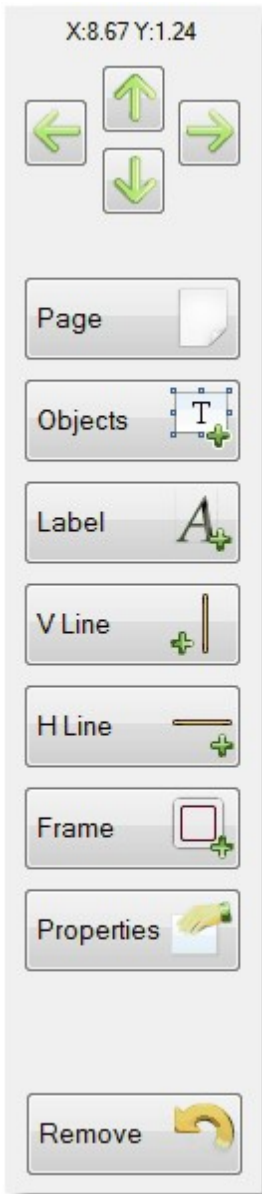
All Font

Use the All Font option to set the font properties on all objects currently on the report to be the same.



Side Bar

The following buttons make up the left side of the Custom Directory Design Window. Click on each item for more information.



Nudge

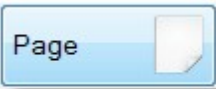
Use the 4 nudge buttons to push the currently selected object in the direction of the arrow you are pressing.

When an object is selected, your arrow keys on the keyboard of your computer also do the same function as the nudge buttons here.



Above the arrows is the position of the Top Left corner of the selected object displayed in CM.

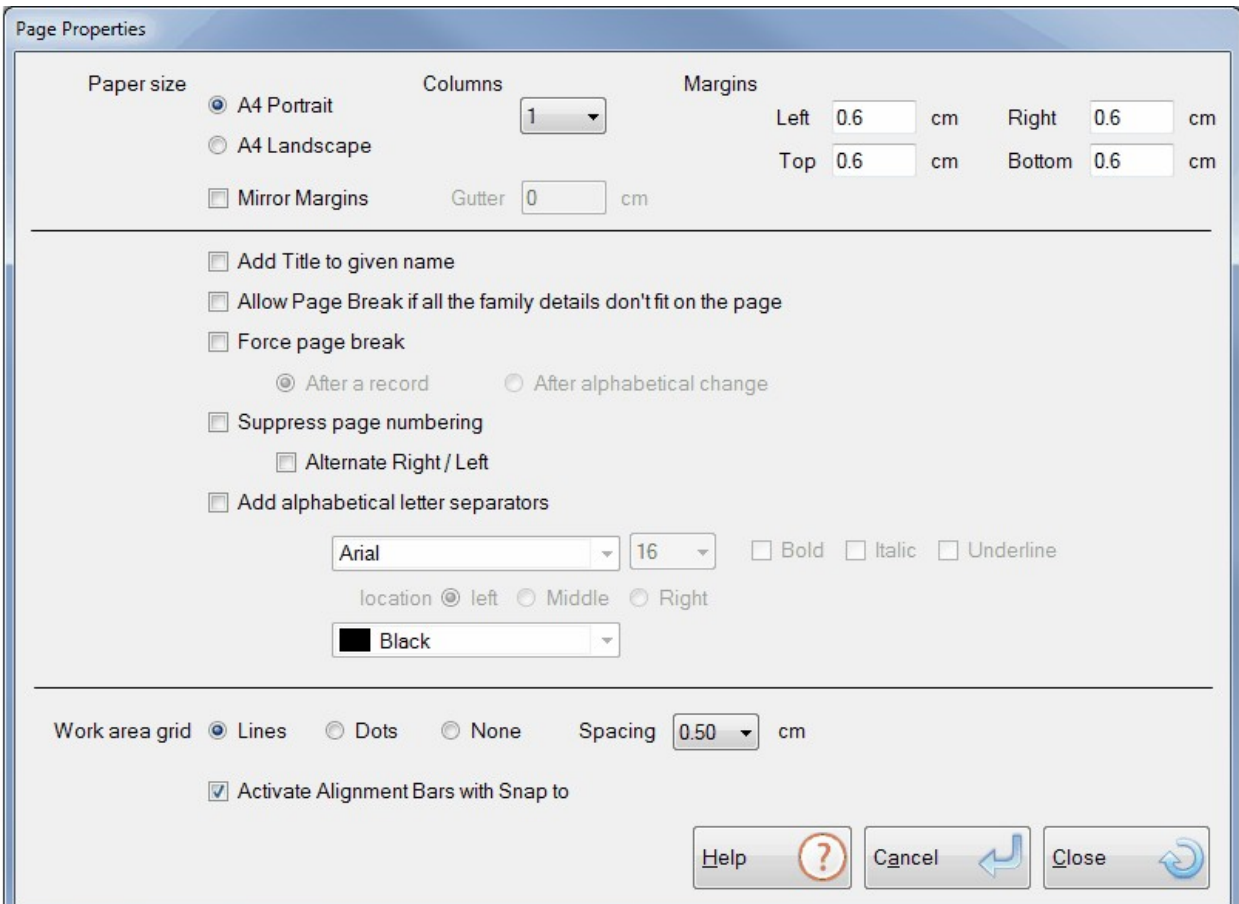
Page



Pressing the Page button opens up the following Page Settings window. All Page Settings affect the currently loaded or new template that you are working on.



Click on each part of this window for more information.



Paper Size

There are only 2 paper sizes supported for Custom Directory / Custom Reports. A4 Portrait, and A4 Landscape. If you want to produce an A5 Booklet formatted church directory, use A4 Portrait size, and when printing, our [Report Viewer](#) has the capacity to automatically produce the A5 directory from an A4 template.

Paper size

A4 Portrait

A4 Landscape

Columns

Setting Columns is simple, Just select the number of Columns, and Pastoral Care will do the rest! You will find that the work area in the Custom Designer tools will shrink to the size of the column.

Columns

3

Mirror Margins

Use Mirror Margins to automatically produce alternate page margins for double sided printing. If you are using some kind of binding that needs more space, you can increase the inside "margin" known as the gutter. The gutter space is that extra space allowance used to accommodate the binding in books and magazines. The amount of gutter needed varies depending on the binding method.

Mirror Margins

Gutter cm

Margins

Setup your page margins as needed. After setting page margins, the work area displayed when you return to your report design shows you the Printable Area. You cannot place objects outside of the printable area.

Margins

Left	<input type="text" value="0.6"/>	cm	Right	<input type="text" value="0.6"/>	cm
Top	<input type="text" value="0.6"/>	cm	Bottom	<input type="text" value="0.6"/>	cm

Titles

Tick this option to force Pastoral Care to always display / print a person's Title with their Given Name on the Custom Report / Directory that you are designing.

Add Title to given name

Page Break Within Family

Tick this option to allow Pastoral Care to insert a page break inside a

Allow Page Break if all the family details don't fit on the page

families data area, effectively splitting that family over multiple pages.

Force Page Break

After A Record

Select this option to force a page break after each Family (when in family mode) or after each individual when in Individual Mode

Force page break

After a record After alphabetical change

After Alphabetical Change

Select this option to force a new page at the start of each new Alphabetical Position based on the first letter of the surname object.

Suppress Page Numbers

Tick this option to turn off Page Numbers.

Suppress page numbering

Alternate Right / Left

Tick this option to automatically flip the page numbers to the outside edge of your document. Ideal for double sided printing / booklet printing.

Alternate Right / Left

Alphabetical Separators

Tick the Alphabetical Separators option to insert A,B,C etc for visually separating each Alphabetical Position based on surname. (See Sample Below). You can use the font options on this area for setting the font, position and colour of the Alphabetical Separators.

Add Title to adult given name

Add alphabetical letter separators

Arial 16

Bold Italic Underline

location left Middle Right

Black

Sample Alphabetical Separator

A

Allwright Ph:054-33-5478
Mr. Stephen & Mrs. Marion
Stephen
Marion
11 BLACKDOG ROAD
Riddels Creek 3412

B

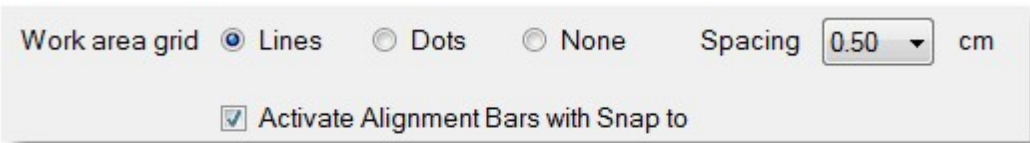
Barton *Ernie* Ph:03-744-1222
Dr. Big Ray & Mrs. Mum *Karen* Mobile:041234567890
Big Ray
Mum
8 KING ST
Sunbury 3099

Blackeby Mobile:041234567890
Mrs. Dot
Dot
Mum
13 GRIFF ST
Keilor Heights 3191

C

Collins *Stephen* Mobile:041234567890
Mrs. Fred & Jill
Fred
Jill
12 FERRIER ST
Sunbury 3099

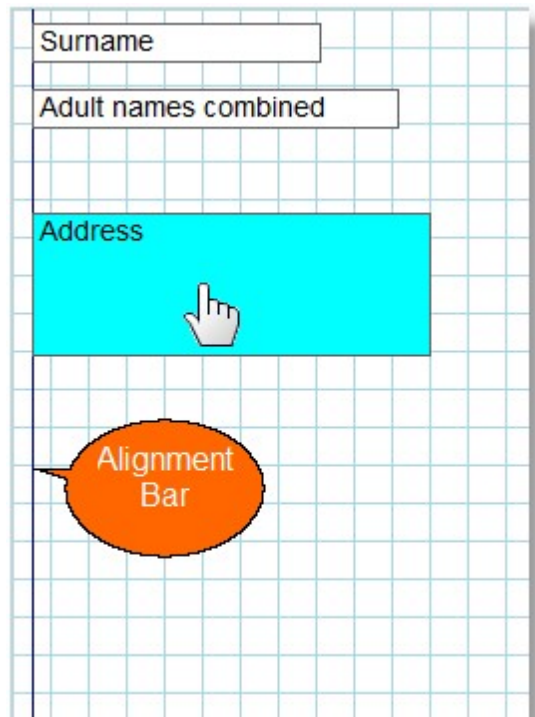
Work Area Grid



Select the style of Work Area Grid to assist you in lining up objects as you place them and move them on the work area.

Alignment Bars

When you are dragging an object (Hold a left click on an object and move the object with the mouse) when either a top edge or a left edge of the moving object comes into line with another object, an alignment bar (line) will draw on the screen to indicate that you have either Horizontal or as in our sample below, vertical alignment. Letting go of the mouse will then allow your object to snap to that position and stay there unless moved later by design.



Objects

The Objects window allows you to select the data objects that you want to include on your Directory.



Click on each one below to learn more about each object and it's properties.



Surname

The Surname Object simply shows a person's Surname. This is controlled within Pastoral Care for either displaying the Family Surname (default) or optionally an individual surname.

Double clicking on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for setting fonts, colours, alignment etc.

See [Standard Object Properties](#) for Surname Properties.

Adults Names Combined

The Adult Names Combined object shows both the Primary and Secondary Adult Name. If only one Adult Name is present in the family, then only that name will be displayed!

Double clicking on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for setting fonts, colours, alignment etc.

See [Standard Object Properties](#) for properties on this object.

Primary Adult Name

The Primary Adult Name object shows only the Primary Adult Name. When a Directory is run in Individual Mode, you must use this object to always display an individuals Given Name.

Double clicking on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for setting fonts, colours, alignment etc.

See [Standard Object Properties](#) for properties on this object.

Secondary Adult Name

The Secondary Adult Name object shows only the Secondary Adult Name. If a Directory is run in Individual Mode, this object will be ignored.

Double clicking on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for setting fonts, colours, alignment etc.

See [Standard Object Properties](#) for properties on this object.

Children's Names

The Children's Names object shows all children's names in the family file. If a Directory is run in Individual Mode, this object will be ignored.

Double clicking on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for setting fonts, colours, alignment etc.

See [Standard Object Properties](#) for properties on this object, including how to set the names for Horizontal Layout, or Vertical Layout.

Address

The Address object shows correctly formatted address information based on your regions standard postal requirements.

Double clicking on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for setting fonts, colours, alignment etc.

See [Address Object Properties](#) for properties on this object.

See Setup - [General Options](#) for address options in Pastoral Care.

Family Details

The Family Details object shows up to four data fields that are Family orientated. Family Phone, Mobile, Fax and Email.

Double clicking on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for setting fonts, colours, alignment etc.

See [Family Object Properties](#) for properties on this object.

Personal Details

The Personal Details object shows up to 14 data fields that are individually orientated fields.

Double clicking on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for setting fonts, colours, alignment etc.

See [Personal Details Object Properties](#) for properties on this object.

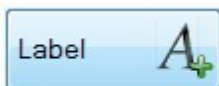
Portrait

The Portrait Object shows a Portrait (photo) object for an individual or a Family depending on the report mode of Individual or Family Mode.

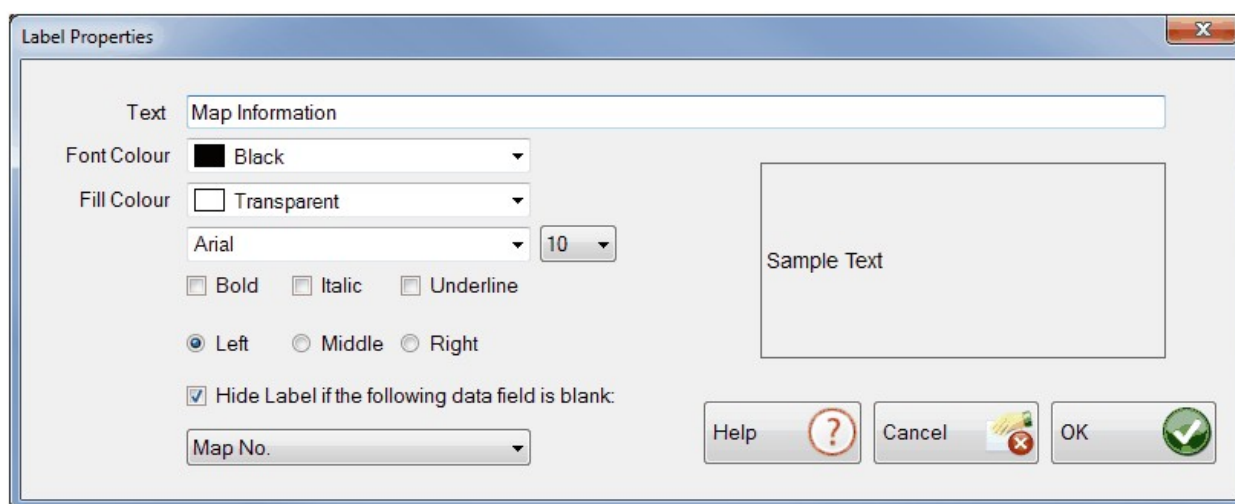
Double clicking on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for portrait settings.

See [Portrait Object Properties](#) for Portrait Properties.

Label



A Label is an object that allows you to simply type in some text and display it on the Directory/Report. Selecting Properties on a label opens up the following properties window.



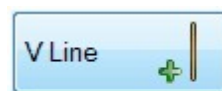
You can Edit the Text for the label here, also set any standard Font property (Type, Colours, Alignment etc)

Hide Label Option

If you tick this option (as in our example above) you are linking the display of the Label Text to the existence of information in a field. In our example, if there is no Map Reference for a family, then the Label "Map Information" would not be shown for that family.

V Line

The Vertical Line Object places a Vertical line on the design window. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line. Vertical lines are repeated down the page for each record.

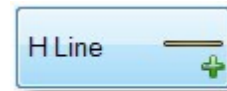


Double clicking on a line will open the [Line Properties](#) window.

H Line

The Horizontal Line Object places a Horizontal line on the design window. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line. Horizontal Lines are repeated for each record.

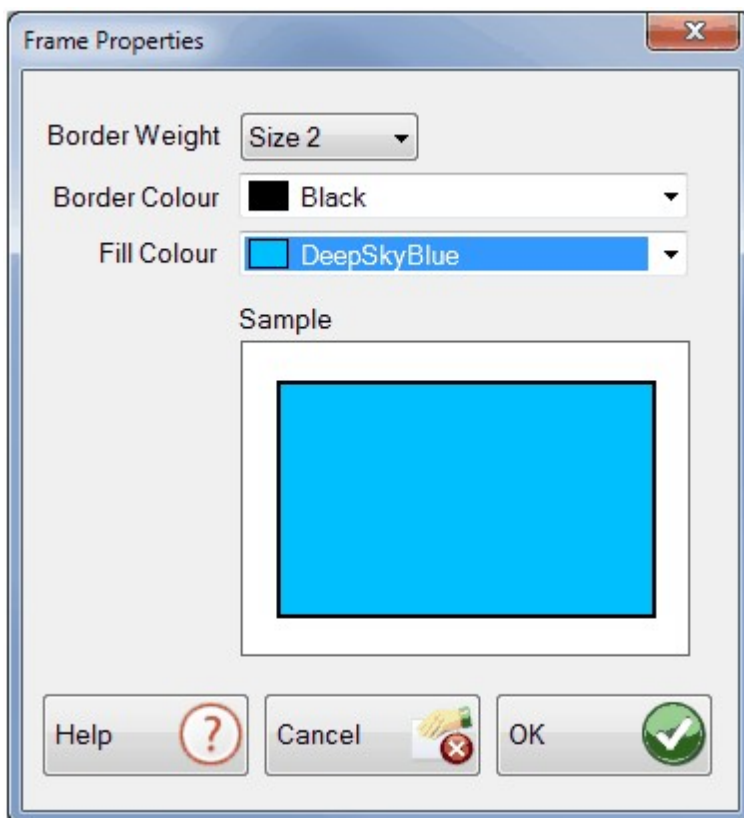
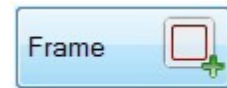
Double clicking on a line will open the [Line Properties](#) window.



Frame

The Frame Object is simply a Rectangle that you can use to provide highlighting or boxing of a section. This object cannot auto grow, so you need to consider how information will display alongside or on top of this object.

You can set Border Size and Colour, and Fill Colour for the Frame Object.



Properties

This section shows all Property windows for Custom Directory and Custom Report objects. To open a properties option window for any object, select that object and press the Properties Button, or double

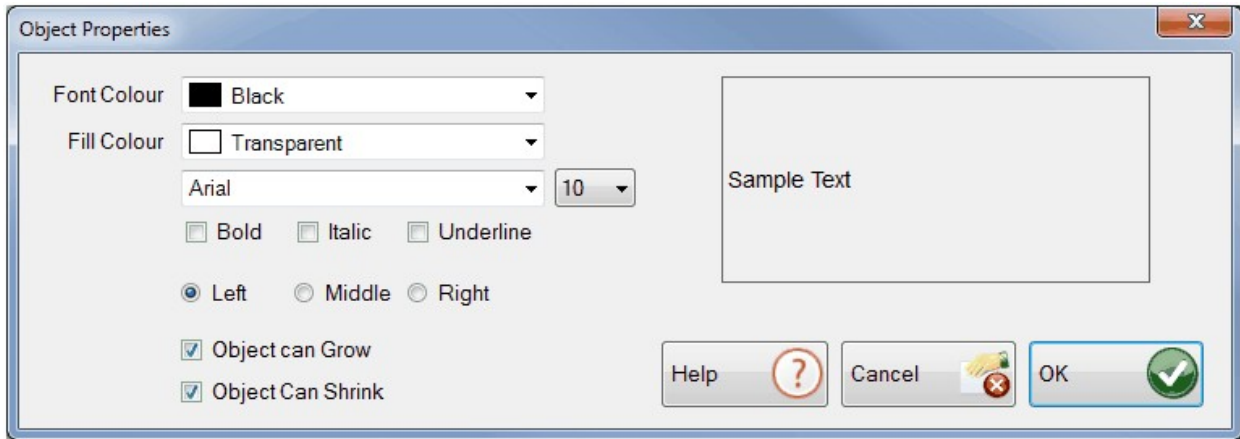


click on the object that you want to see the properties window for.

Standard Object Properties

A Standard Field property window is shown below. The options here are identical for the following Objects:

Surname, Adult Names Combined, Primary Adult Given Name, Secondary Adult Given Name, Children's Names



Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size itself in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

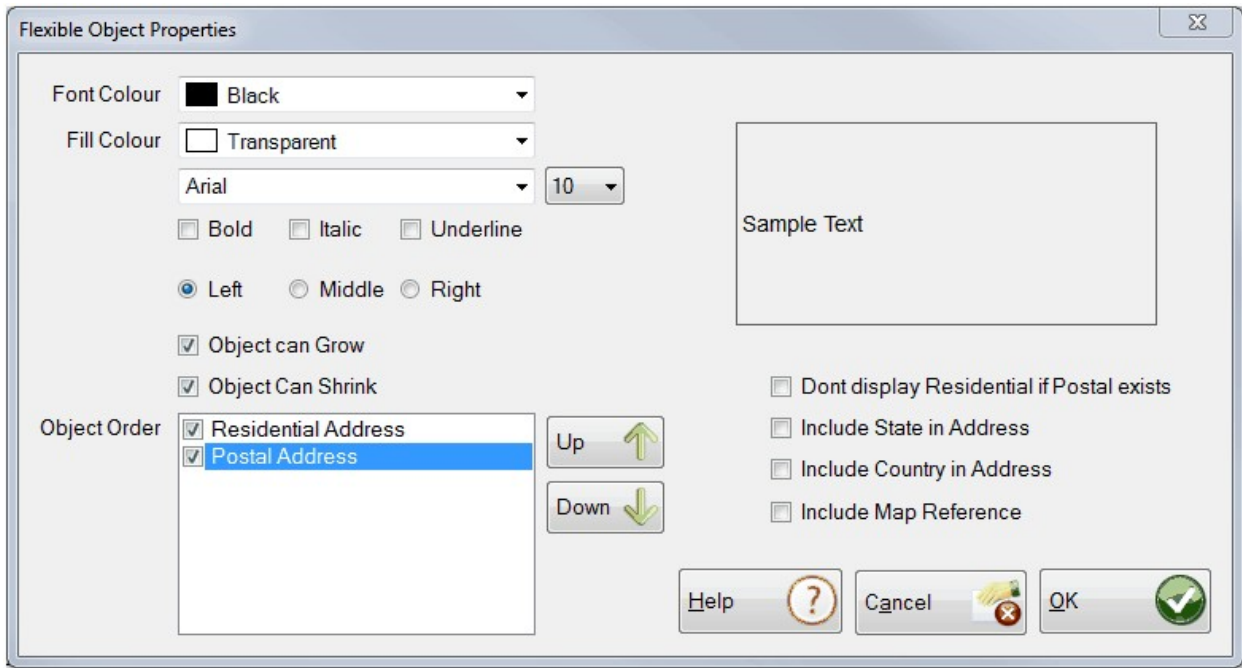
Children's Names

When this property window is displayed for Children's Names, the following options are included in this section to set the names to be listed Vertically, or Horizontally.

- Place children names 'Horizontally'
- Place children names 'Vertically'

Address Object Properties

An Address Field property window is shown below.



Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

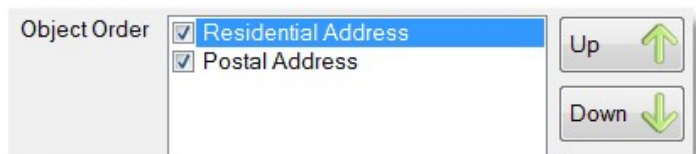
Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size itself in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

Object Order

Choose the order for your address type. If you want to display only one address, tick only the address you want to display.

Use the Arrow keys to change the order of display.

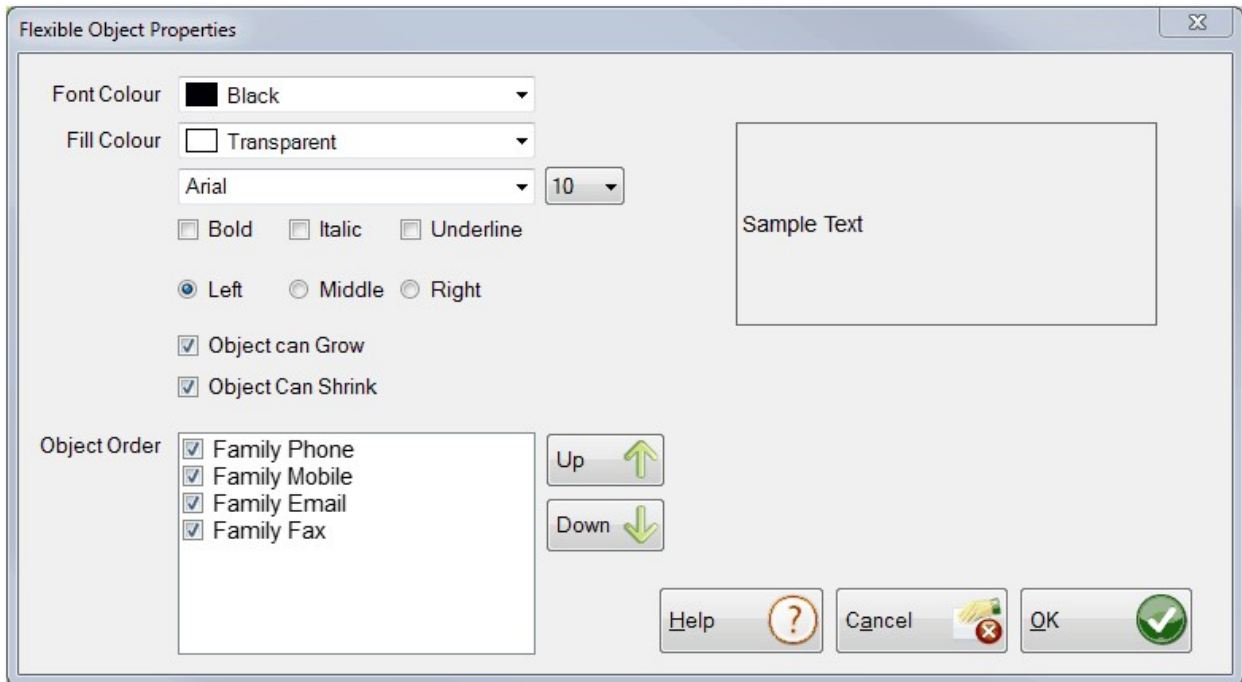


Don't Display Residential...

Tick the Don't Display Residential If Post Exists option to force (for this custom design) Pastoral Care to only show the post address if both address fields are filled in for the family file.

Family Object Properties

A Family Field property window is shown below.



Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

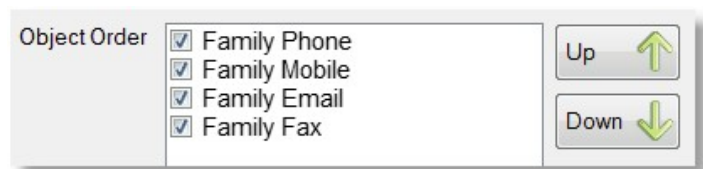
Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size it'self in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

Object Order

Choose the order for your selected fields.
Tick only the fields that you want to include with this object.

Use the Arrow keys to change the order of display.



Personal Details Object Properties

A Personal Details Object property window is shown below.

Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

Automatic Sizing Features

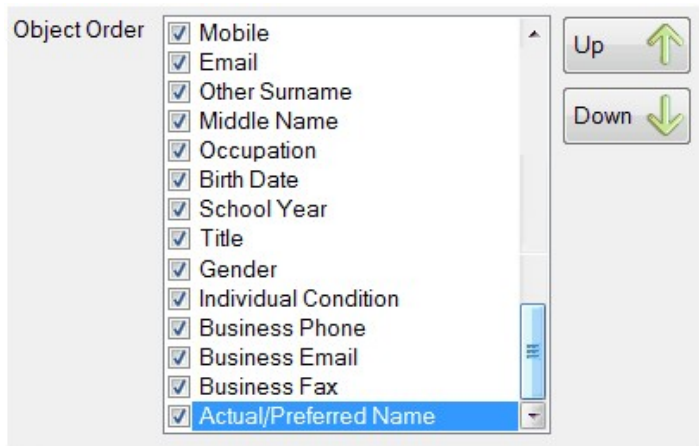
The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size it'self in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

Object Order

Choose the order for your selected fields.
Tick only the fields that you want to include with this object.

Use the Arrow keys to change the order of display.

Shown below is a sample of how this object displays on a Custom Directory. Each Individuals Name is automatically included with the selected data.



Stephen

Mobile Phone:0400297025
Email:stephen@spirit.com.au
Occupation:Plumber
Birth Date:03/07/1945
Title:Mr.

Marion

Mobile Phone:041234567890
Occupation:Doctor
Birth Date:05/07/1946
Title:Mrs.

Peter

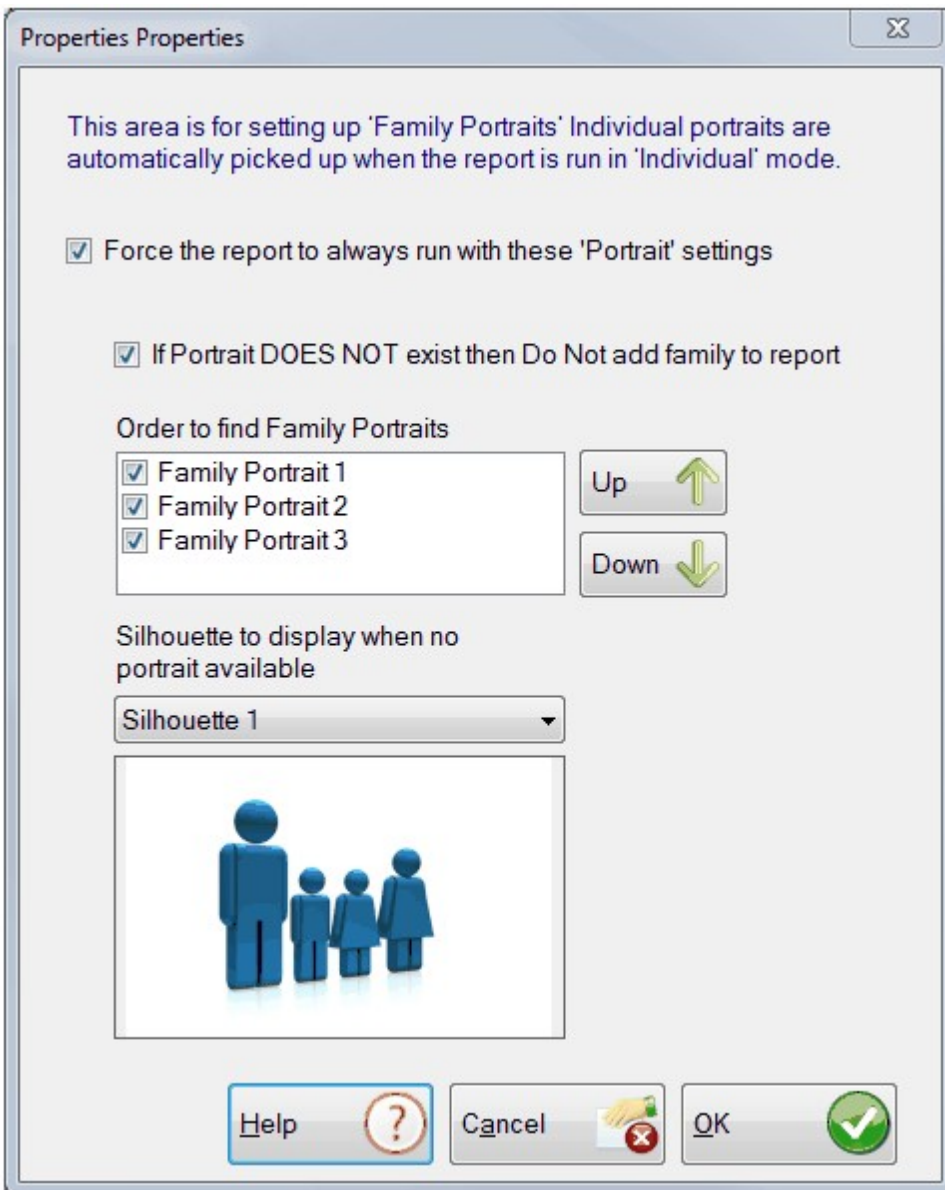
Mobile Phone:041234567890
Occupation:Retired
Birth Date:02/06/1965
Title:Rev.

Portrait Object Properties

The Portrait Object properties window (shown below) allows you to either let Pastoral Care manage the portrait selection automatically (Recomended) or to allow you to force the control of the portrait by ticking the option "Force the report to always run with these Portrait settings".

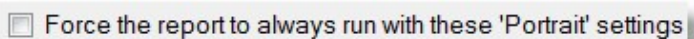


Click on each part of this window below to learn more about Portrait control.



Override Default Settings

Tick this option to use settings on this window to override Pastoral Care default portrait controls, only however for the current template you are working on.



Do Not Add Family Option



Tick this option to suppress a family or individual from your Custom Directory/ Report if there are no portrait's for use.

If Portrait DOES NOT exist then Do Not add family to report

Portrait Order

Manually adjust the Portrait Search Order for the current Directory or Report design. Having a Tick on a portrait item identifies to Pastoral Care that you want to use that Portrait in the output. In the example above, when composing this object, Pastoral Care will first look for a portrait for the current family in Portrait Save Position 1, if one exists, it will use it, if not it will continue looking in Save Position 2, then 3 until it finds a portrait.

Order to find Family Portraits

<input checked="" type="checkbox"/> Family Portrait 1	Up 
<input checked="" type="checkbox"/> Family Portrait 2	
<input checked="" type="checkbox"/> Family Portrait 3	
Down 	

Silhouette Control

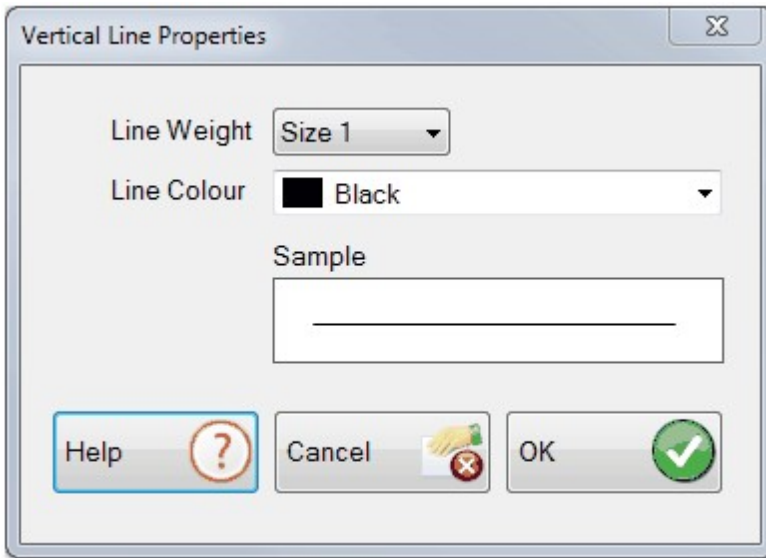
If no portrait exists, you can choose to use a Silhouette to fill in the gap in the report to indicate that a portrait should be there, but it is missing.

Silhouette to display when no portrait available

Silhouette 1



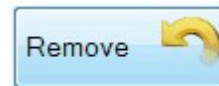
Line Properties



You can select different Line Weights and Line Colours from the Line Properties window.

Remove

Remove the selected object from the design grid. You can also press [Objects](#), and un-tick the object that you want to remove.



Design Tips

In this section we have included a few design tips for helping you with Custom Directory Designer. Click on each area of interest below.

[Not Enough Options?](#) [Right Click](#)

[Saving White Space](#) [Selected Object](#)

[Sizing Objects](#) [Moving Objects](#)

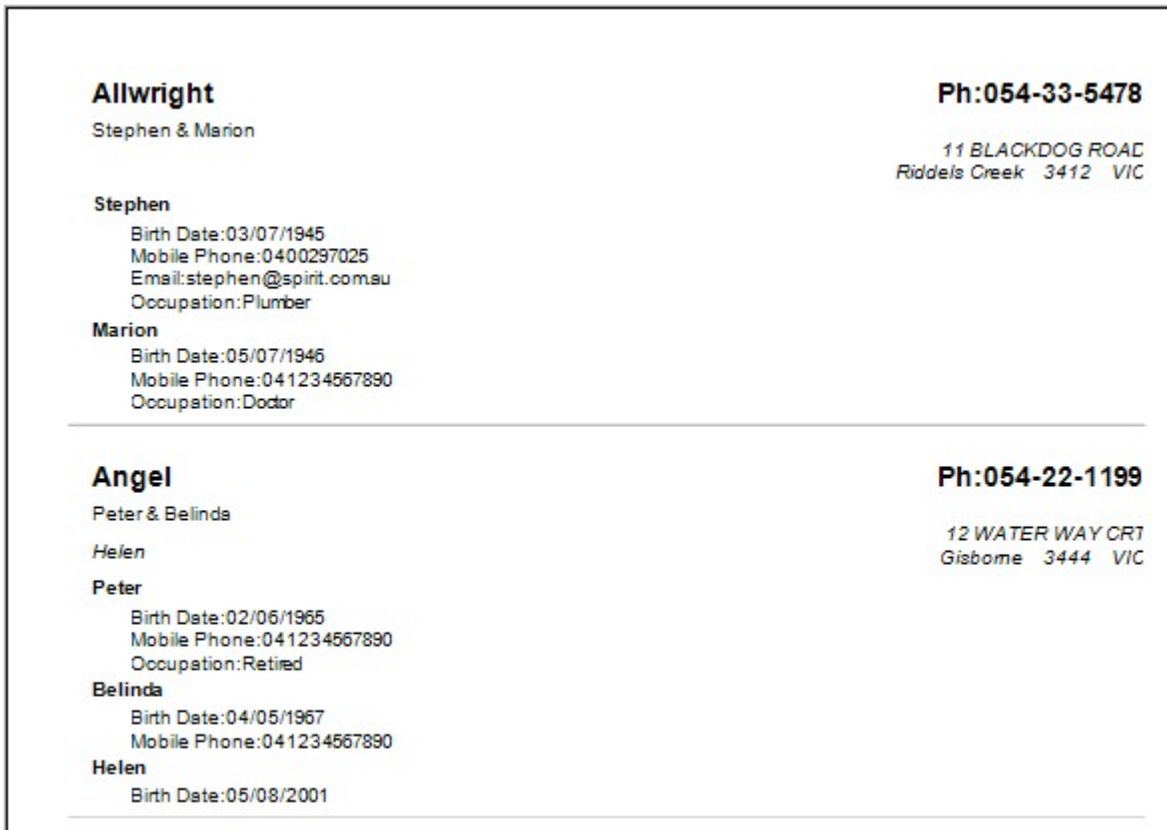
Not Enough Options?

If you have created, or tried to create a Custom Directory and have found that you don't have enough control, try importing your Custom Directory into Custom Report.

Shown below is a Directory we have created called Sample.



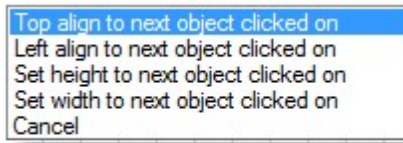
This template produces are report that looks like this:



Now you can start the [Custom Report Designer](#), choose OPEN from the toolbar, and choose IMPORT a Custom Directory. Your custom directory imported into Custom Report Designer with more options, now looks exactly the same, except you now have more objects to enhance the directory with, and the added ability to create your own specialised sub reports for more control over grouped data fields.

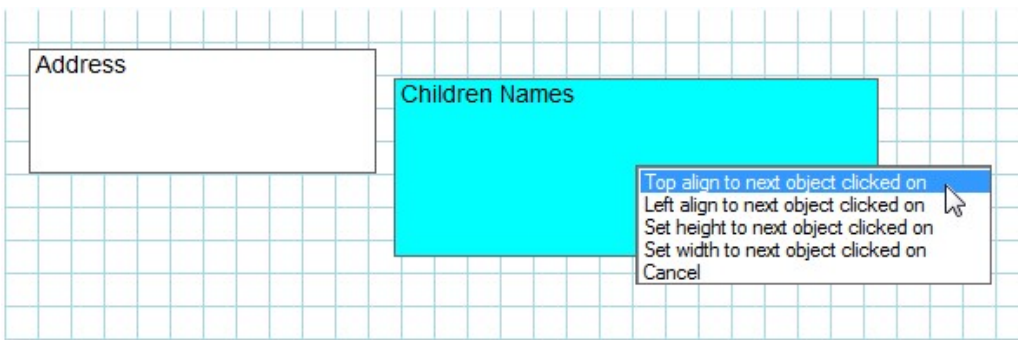
Right Click

If you Right Click while your mouse pointer is over an object, the following pop up menu opens up.

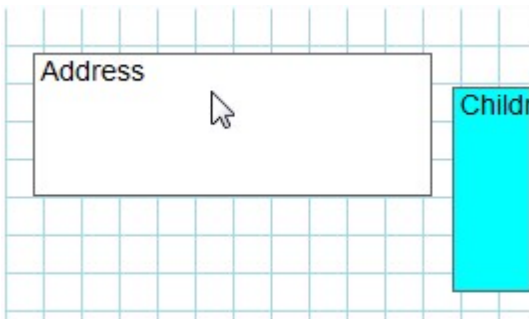


Each action described here will occur to the object that you right clicked on, in relation to the NEXT object you click. For example, if you now selected the first menu item of "Top Align to next object clicked on" and then you clicked on the address box, your Selected Object would move vertically only until the top of the selected box was in line with the top of the Address Box.

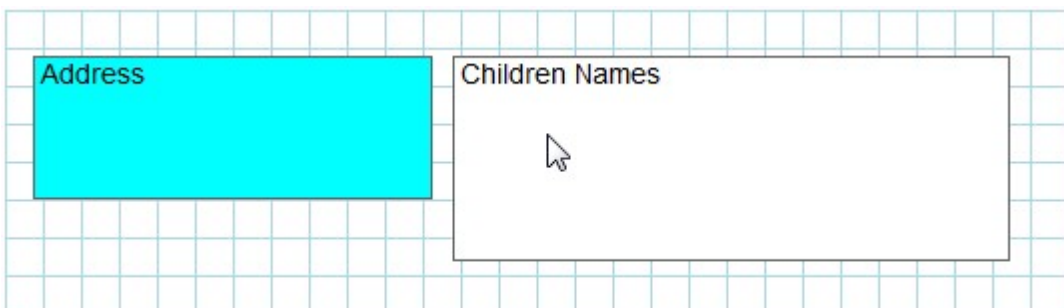
Here is a few visuals to show this. The picture below shows that you have Right Clicked on Children's Names, and you are about to left click on "Top align to next object clicked on"



After selecting that, move the cursor to the Address Object and left click it...



After the left click, the Children's Names object has moved!



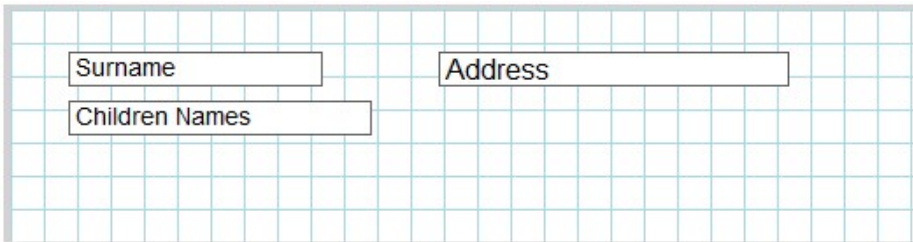
(Notice that Address is now Blue, this is because it is the last object selected, and is therefore the active object)

Saving White Space

The objects in Custom Directory and Custom Report all have Auto Grow and Auto Shrink enabled. This allows for an object to adjust its HEIGHT according to how much information needs to fit in that object.

There is a case where one object alongside another object will influence each other and get in the way of shrinking properly, creating the effect of wasting space.

Consider this template:



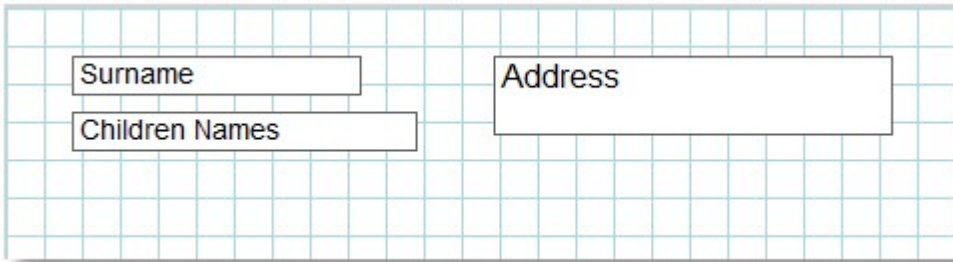
This should produce a report that looks like this:

Smith	25 St Helena Drive Unit 4
James	Juanga 4444
Helena	NT
Peter	
John	

HOWEVER, because the Address Field and the Surname field are the same HEIGHT and are top aligned, even though Auto Grow and Shrink are turned on all 3 objects, the actual report looks like the following. Note the wasted space between the Surname and Childrens Name.

Smith	25 St Helena Drive Unit 4 Juanga 4444 NT
James	
Helena	
Peter	
John	

NOW, make one small change to the design of the template, we are going to make the Address box a bit taller, still top aligned with the Surname:



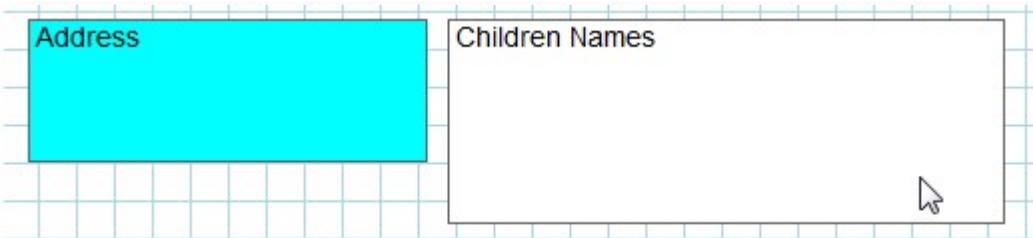
Now the address box overlaps into the Children's Names object, the custom report that is created behaves much better, and produces a report like the following:

Smith	25 St Helena Drive
	Unit 4
James	Juanga 4444
Helena	NT
Peter	
John	

This method may not work in all circumstances, but should assist in reducing wasted space as much as possible. The only object that we are aware of that will always cause wasted space without the ability to influence this greatly is the Portrait Object.

Selected Object

Any object that is showing itself shaded in a Light Blue colour is the currently selected object. Only one currently selected object can exist at the same time. The Address object below is the active object in this example.



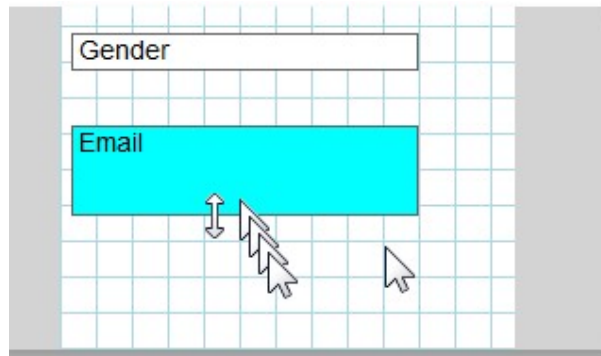
Sizing Objects

When you have placed an object on any Design Grid area in a Custom Directory, Custom Report or Sub Report, you can use the following techniques to size and align your objects.

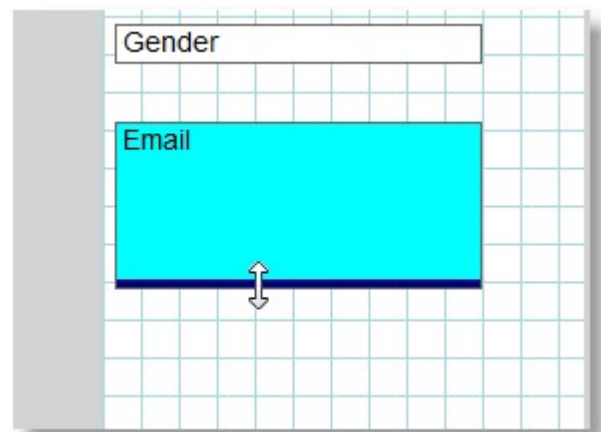
Sizing of an object can be done by using one of 2 methods. Use the mouse to drag an object border, or using the [Right Click](#) menu on an object to change it's size relative to another object. See [Right Click](#) for some shortcut sizing and alignment options.

Dragging an object border to change it's size

You can only drag one edge (border) of an object at a time, Resizing by use of dragging a corner of an object is currently not supported. To re-size an object, simply move the mouse pointer towards the edge of the object until it changes from your normal mouse pointer, to a double arrow. This is shown below.



After moving the mouse towards the object, the double arrow will appear when you are in the correct position. At the same time, the border or edge that you are about to resize will change to a bold dark blue line, indicating that this edge is ready to move.



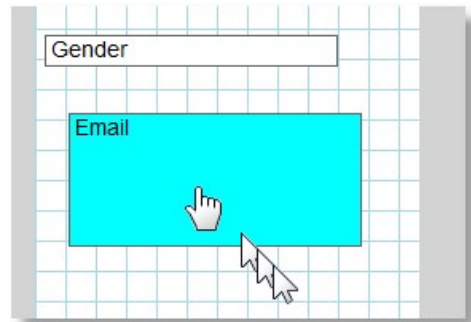
Now the thick blue line has appeared with the double arrow, left click and hold the left mouse button down, and move the mouse in the direction that you want to re-size that edge to.

Moving Objects

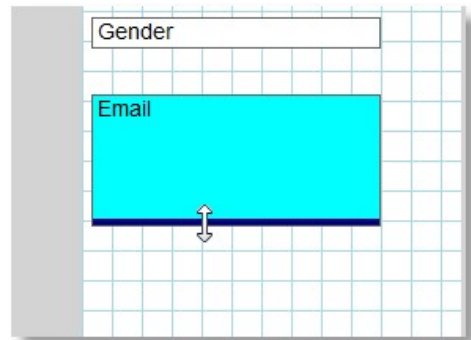
Moving an object can be done by using one of 3 methods. Use the mouse to drag an object, use the [Right Click](#) menu on an object to align it to another object, or use Nudge controls to push an object in small increments. See [Right Click](#) for some shortcut sizing and alignment options.

Moving an object with the mouse

Simply move your mouse pointer over an object and left click and hold the left button down. The mouse pointer will change to a hand showing you that now have a hold of that object.



After moving the mouse towards the object, the double arrow will appear when you are in the correct position. At the same time, the border or edge that you are about to resize will change to a bold dark blue line, indicating that this edge is ready to move.



Custom Report Designer

Introduction

The Custom Report Designer is one of our family of reporting tools that allows you to build your own reports. The latest addition in terms of new features to this suite of utilities is the [Custom Directory Designer](#), and you will find that both programs are extremely alike. The biggest difference is that in Custom Report Designer there is much more power under the hood. To get familiar with these custom utilities, you could try mucking around with [Custom Directory Designer](#), and get to know how everything ticks on the surface before diving into the added power (and added complexity) of Custom Report Designer.

New Users

If you are new to Custom Report, you're in for a treat, as learning from scratch may be a bit simpler. As suggested, try out [Custom Directory Designer](#) first to get a grip on what's possible, and then try out Custom Report Designer.

Existing Users

Previous versions of Custom Report Designer were extremely powerful, and with that power came great complexity. We were first to admit that this feature was very hard to learn and master. To create a new version which was just as powerful, but easier to use took a huge leap in both new concepts, and new programming tools. As such, unfortunately, none of your old Custom Reports will be able to be imported into Pastoral Care 12. This is the first time in about 20 years we have not been able to import everything from earlier versions, and we did not make this decision in a hurry.

We are however certain that you will enjoy the new Custom Report Designer tools, and find that your reports will be even better than before!

So jump right in, if you have managed to tame earlier versions of Custom Report Designer, we know you will just love this version, so much so we hope that you will be more than pleased to design new and better reports for your church.

Getting Started

Custom Report Designer can be found on the Utilities Tab from the main menu. Click on each of the links below for more information.

[How to Use a Custom Report](#)

[The Custom Report Main Window](#)

[Managing Custom Reports](#)

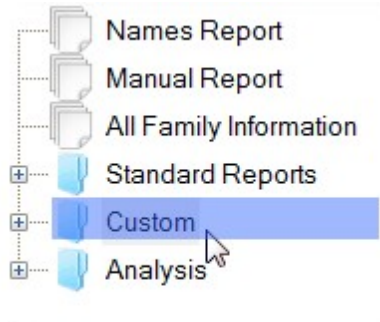
[Introduction to Sub Reports](#)

How to Use a Custom Report

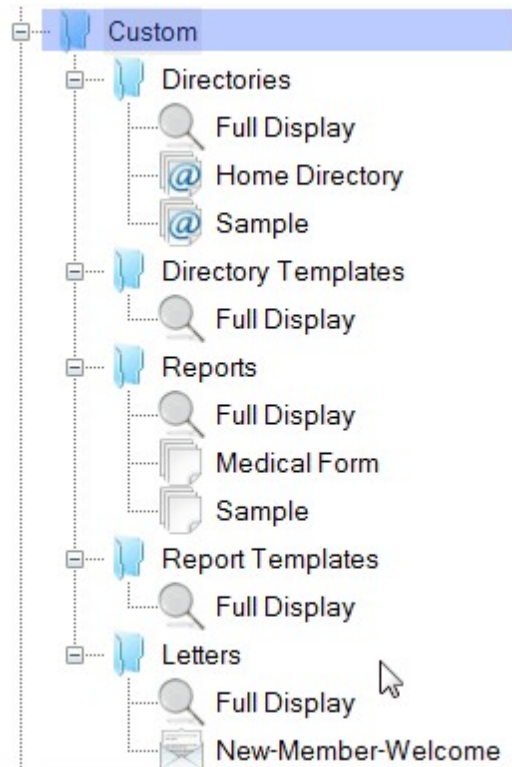
Designing your own reports is one thing, but how do you use them? When you create a Custom Directory, Custom Report or Custom Letter, Pastoral Care adds them to the list of reports available throughout Pastoral Care.

See [Create Reports](#) for full details on using the main Reporting area in Pastoral Care.

Anywhere you see our standard Report List you will find your Custom Directories, Reports and Letters. Simply select any [Filters](#) and other options that need to narrow down your report to just the people you want, and then find your Custom report in the list and double click it!



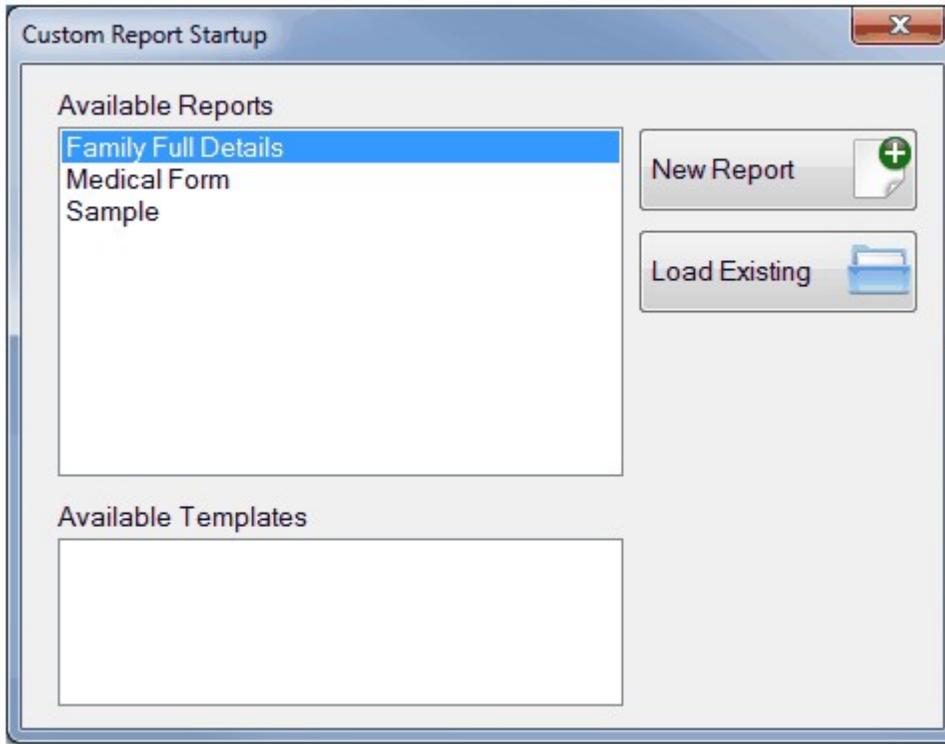
Click on Custom (shown above) to display and use all of your custom Directories, Reports and Letters. (Shown below)



Starting Custom Report Designer

To start Custom Report Designer, go to the Utilities Tab on the main menu, and double click on Custom Report Designer. The following load window opens up, letting you choose to either Open an existing design, or to create a new Custom Report.

Choose to load a selected report, or to create a new report.



New Report

The New Report option will open the Custom Report Design window, and also display the opening Object Picker window. Use the Object Picker window to get started by selecting what you want to see on your report.

If there are objects missing from the Object Picker that you want to include (for example Medical Information) chances are that you will need to add a sub report to include that information.

Object Picker Window

The Object Picker window is used to select the main data fields (objects) to include on your Custom Report. If you tick nothing, Pastoral Care will be unable to create your report.

Click on each area of this window to learn more.

The screenshot shows a window titled "Objects" with a light blue border. It is divided into several sections, each with a title and a list of objects with checkboxes:

- Available Data Objects:** Surname, Portrait, Primary Adult Name, Secondary Adult Name, Phone, Family Mobile, Family Email Address, Family Fax, Residential Street Line 1, Residential Street Line 2, Residential Suburb, Residential Postcode, Residential State, Residential Country, Map Number, Map Reference, Postal Street Line 1, Postal Street Line 2, Postal Suburb, Postal Postcode, Postal State, Postal Country, Family Condition Status.
- Available Page Objects:** Report Header, Page Header, Page Footer, Sub Report (Within data section), Sub Reports (At the end of data section).
- Available Grouped Data Objects:** Adult Names Combined, Children Names, Address, Family Details, Personal Details.
- Finance Area Objects:** Receipt Amount, Receipt Start Date, Receipt End Date.

Below the Finance Area Objects section, there is a note: "All finance objects for Custom Reports are only available for custom reports used in the Financial Records area of Pastoral Care."

At the bottom right of the window, there are two buttons: "Help" with a question mark icon and "Close" with a circular arrow icon.

Data Objects

Tick any of the main Pastoral Care data objects to include on your Custom Report. Each of these fields are self explanatory, so we won't point out that the Surname Field adds a Surname field to your report!

If you are looking for data to add that is NOT displayed in the Objects window, you will need to add a sub report, and have a look at the data fields that can be added to a sub report.

Data areas for Sub Reports

The following areas can be covered with a sub report object:

Personal Details, Status, Individual Groups, Ministry, Medical, Relationships, Individual Dates, Flexi Fields, Email and SMS Lists, Other Contact, Family Groups, Family Events, Family Dates, Visitation, Family File Memo, Family Notes

Special Objects

The Surname field can be controlled automatically to display an Individual Surname when a custom report is run in Individual Mode. When in Individual Mode, the Primary Adult Name field is the field that will be used to display a person's given name.

- Surname
- Portrait
- Primary Adult Name
- Secondary Adult Name
- Phone
- Family Mobile
- Family Email Address
- Family Fax
- Residential Street Line 1
- Residential Street Line 2
- Residential Suburb
- Residential Postcode
- Residential State
- Residential Country
- Map Number
- Map Reference
- Postal Street Line 1
- Postal Street Line 2
- Postal Suburb
- Postal Postcode
- Postal State
- Postal Country
- Family Condition Status

Page Objects

The Page Objects are different than any others. These objects are more global, and provide increased power to the main [Data Objects](#).

Click on each option (right) for full details of each item.

- Report Header
- Page Header
- Page Footer
- Sub Report (Within data section)
- Sub Reports (At the end of data section)

Report Header

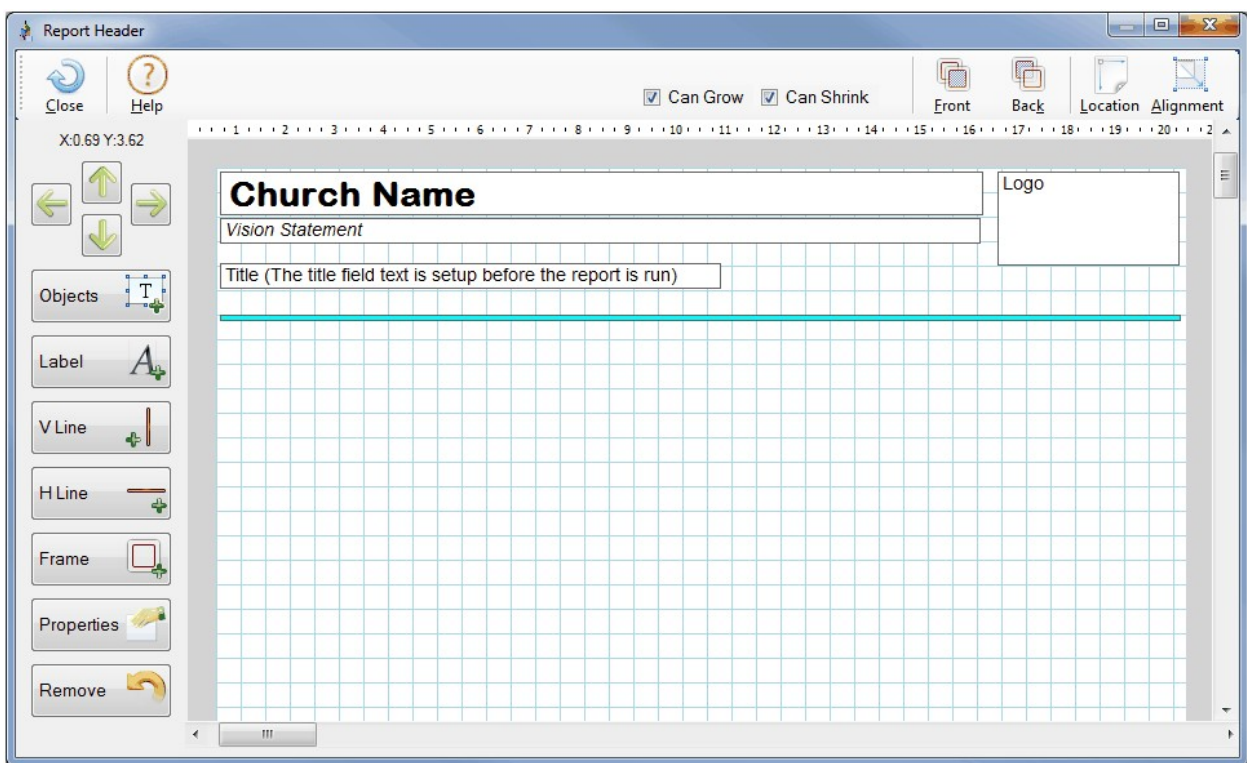
The Report Header object when added to a Custom Report appears at the very top of the design area. It is labeled as Report Header. The words Report Header will not print out on your final design report.

A Report Header is simply a bit of space at the very top and start of a report that only prints in that position, and only on the very first page. This is an ideal spot for putting a banner name of the report, or even a cover page for a directory. If you make the report header large enough, then it will take up one whole page, and make an ideal cover page that is always the same when you print out that report.

Double Clicking on the report header will open the report header in design mode, allowing you to add colours, boxes, Labels and some header specific Data Objects.

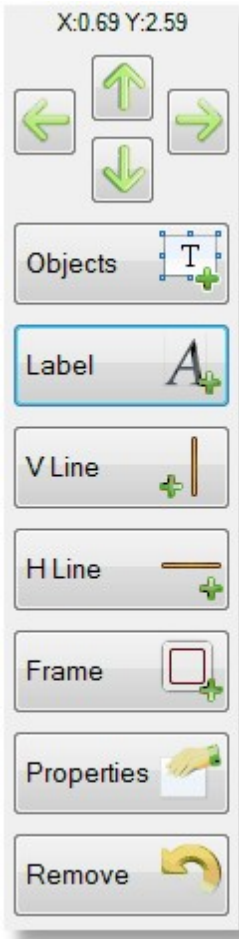


Click on each part of the Report Header Design Window below to learn more.



Side Bar

The following buttons make up the left side of the Report Header Design Window. Click on each item for more information.



Nudge

Use the 4 nudge buttons to push the currently selected object in the direction of the arrow you are pressing.



When an object is selected, your arrow keys on the keyboard of your computer also do the same function as the nudge buttons here.

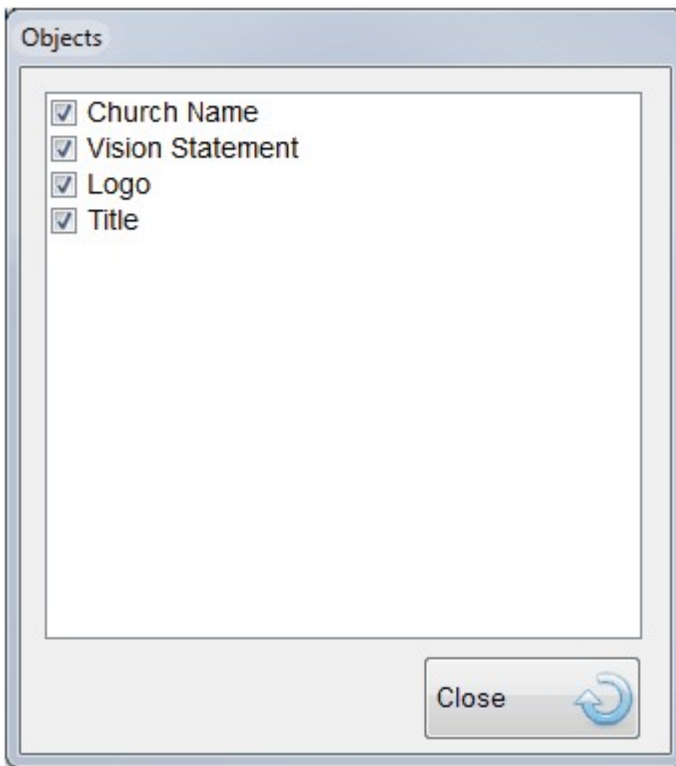
Above the arrows is the position of the Top Left corner of the selected object displayed in CM.

Objects

The Objects window allows you to select the data objects that you want to include on your Report Header.

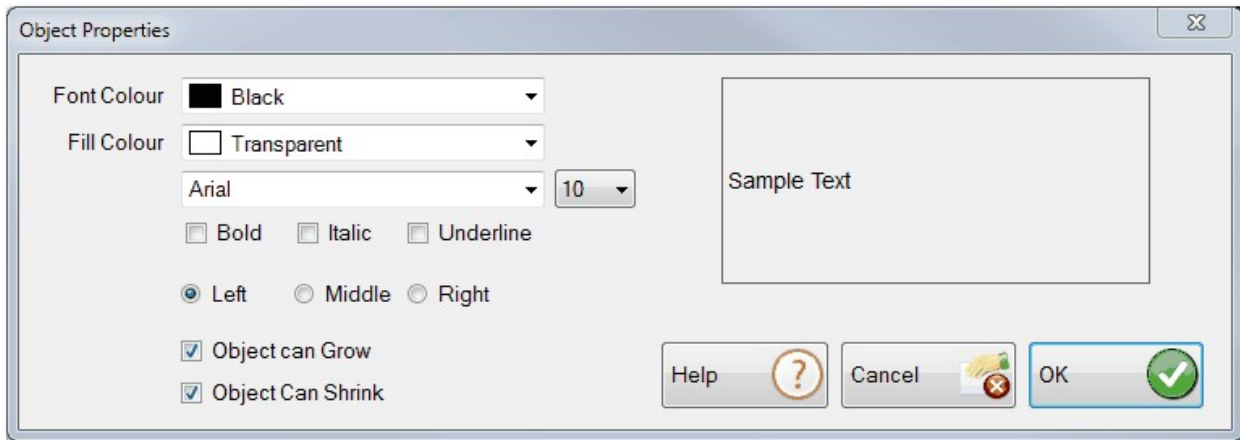


Click on each one below to learn more about each object and it's properties.



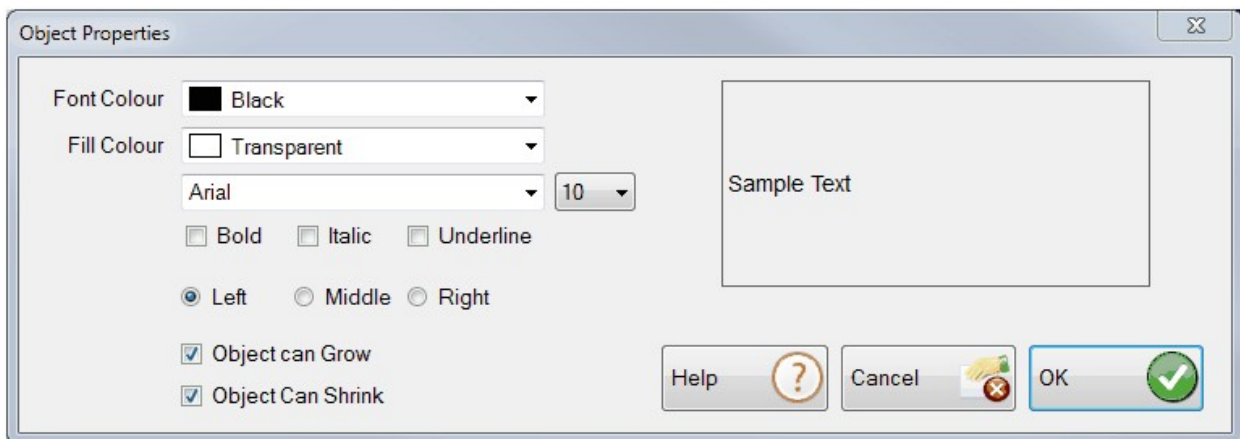
The Church Name Object shows the registered Church Name.

Double clicking on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for setting fonts, colours, alignment etc.



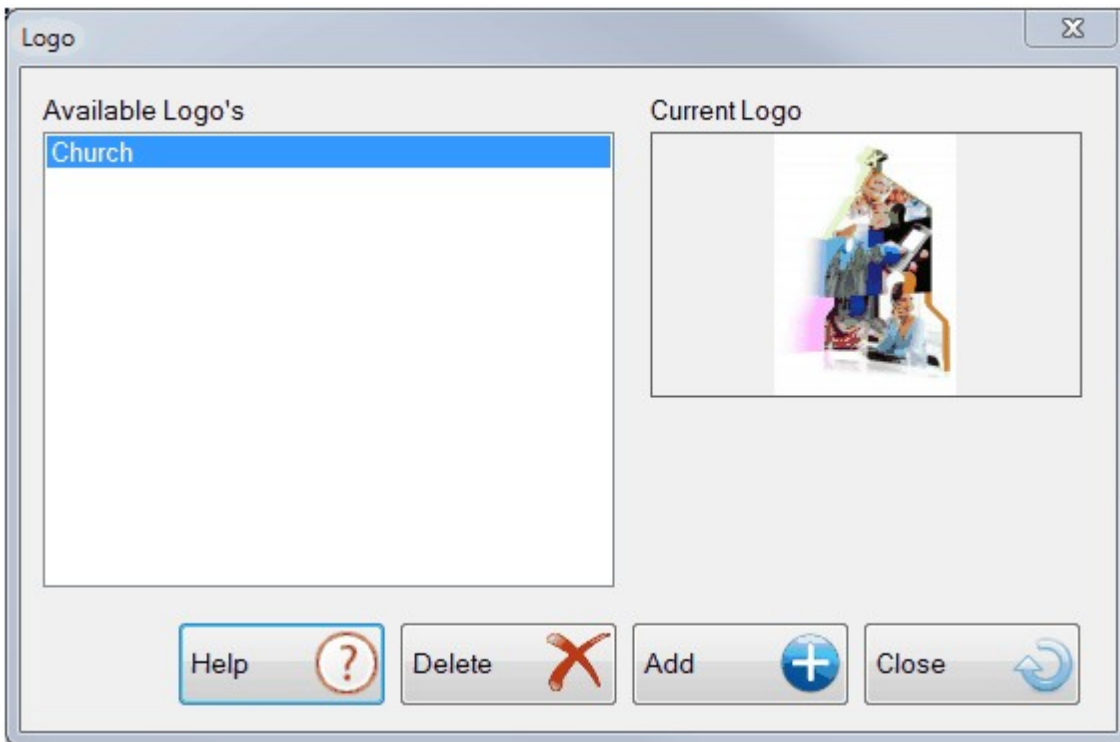
The Vision Statement Object shows the Vision Statement of the church as setup in the [Setup Vision](#) area.

Double clicking on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for setting fonts, colours, alignment etc.



The Logo Object lets you assign a Logo Image to print out on the report Header.

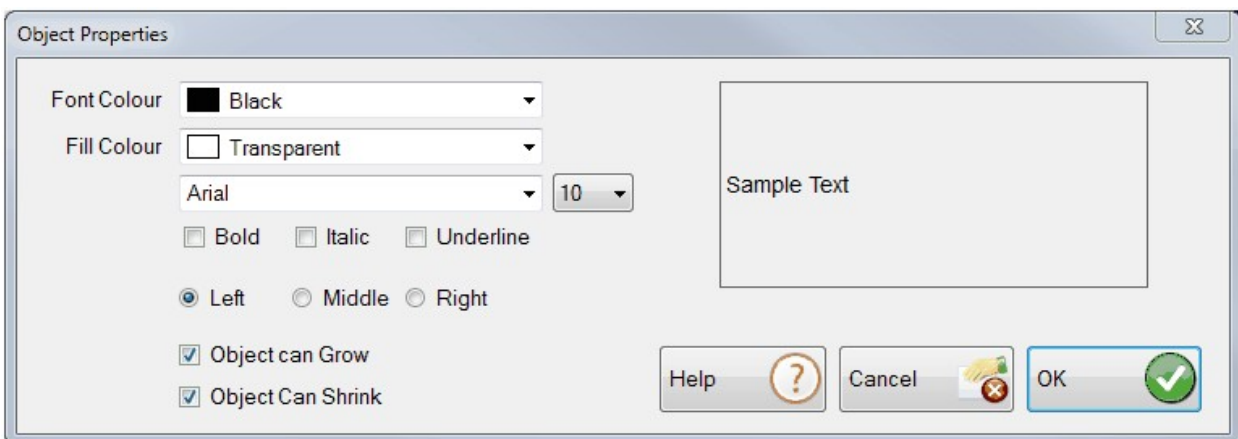
Double clicking on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for this object. This is shown below.



Select your logo from the Available Logo's and press Close to add this to the Report Header. If you want to make another logo available to the reports area, press the Add Button.

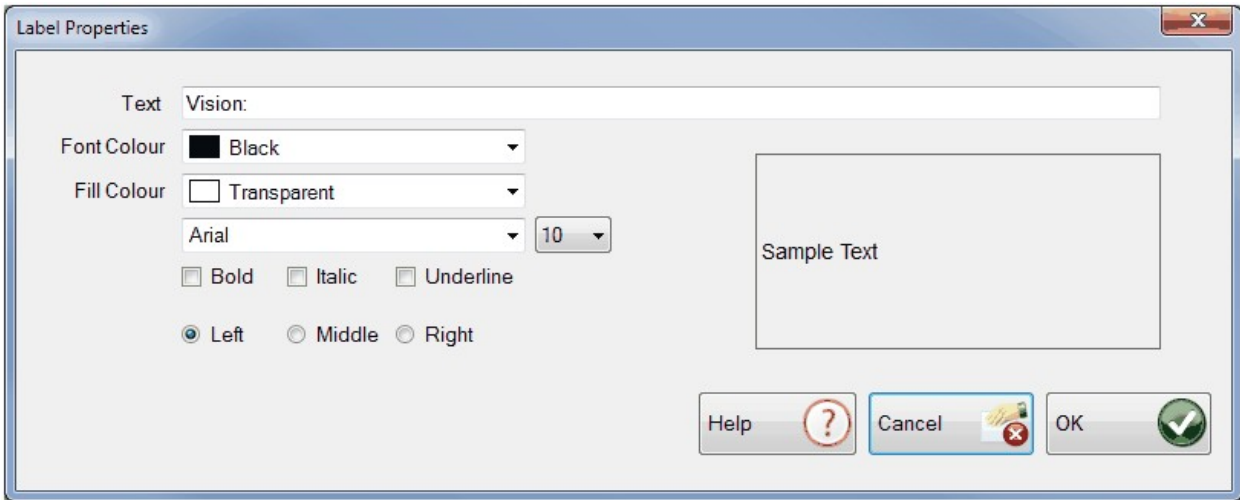
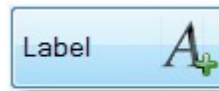
See [Add Logo](#) setup for more details.

The Title field accepts information from the Title Area of reporting. This object will get it's data from the [Report Title](#) area. Properties available for this object include all standard colour and font options.



Label

A Label is an object that allows you to simply type in some text and display it on the Report. Selecting Properties on a label opens up the following properties window.

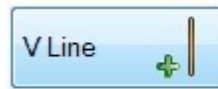


You can Edit the Text for the label here, also set any standard Font property (Type, Colours, Alignment etc)

V Line

The Vertical Line Object places a Vertical line on the design grid. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line.

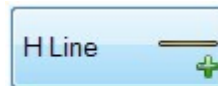
Double clicking on a line will open the [Line Properties](#) window.



H Line

The Horizontal Line Object places a Horizontal line on the design grid. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line.

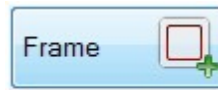
Double clicking on a line will open the [Line Properties](#) window.

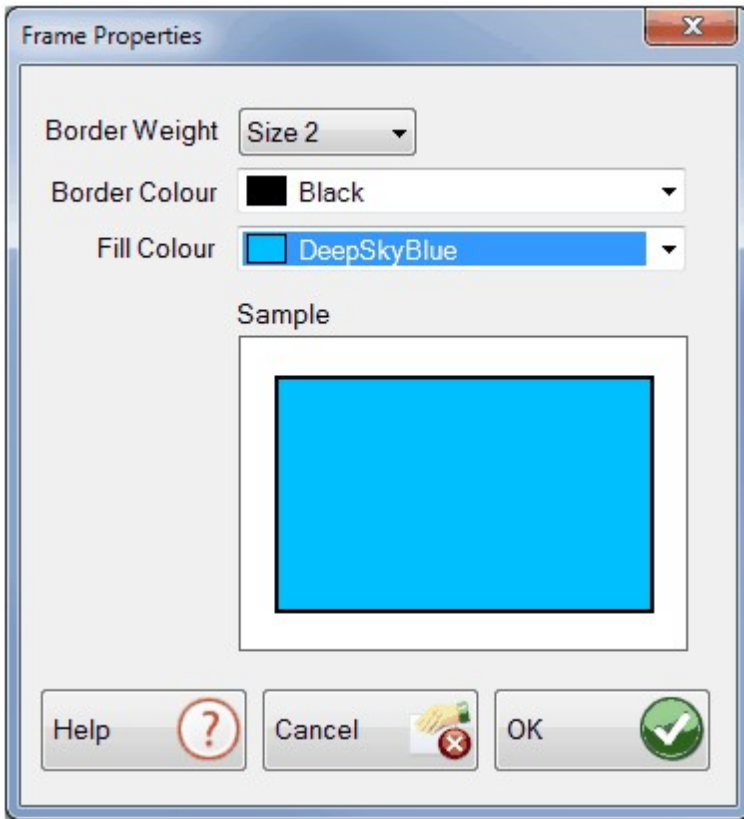


Frame

The Frame Object is simply a Rectangle that you can use to provide highlighting or boxing of a section. This object cannot auto grow, so you need to consider how information will display alongside or on top of this object.

You can set Border Size and Colour, and Fill Colour for the Frame Object.





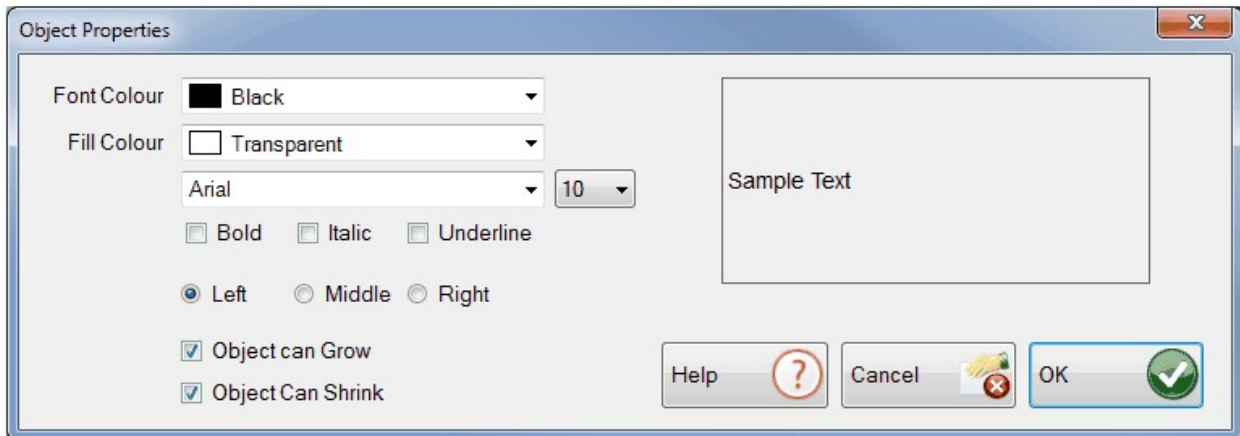
Properties

To open a properties option window for any object, select that object and press the Properties Button, or double click on the object that you want to see the properties window for.



A Standard Field property window is shown below. The options here are identical for the following Objects:

Church Name, Vision Statement and Title.



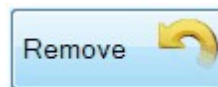
Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size it'self in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

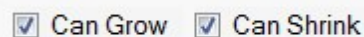
Remove

Remove the selected object from the design grid. You can also press [Objects](#), and un-tick the object that you want to remove.



Auto Size

By default, the report header will Grow and Shrink as needed depending on the objects used. If you want to force a set size for this, untick these options as needed.



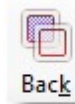
Front

Bring the currently selected object to the front of the page, this makes this object cover any objects that might be overlapping.



Back

Send the currently selected object to the back of the page, this makes this object sit behind or be covered by any overlapping objects.



Location

Use the Location window (shown below) to fine tune the size and position of the selected object.

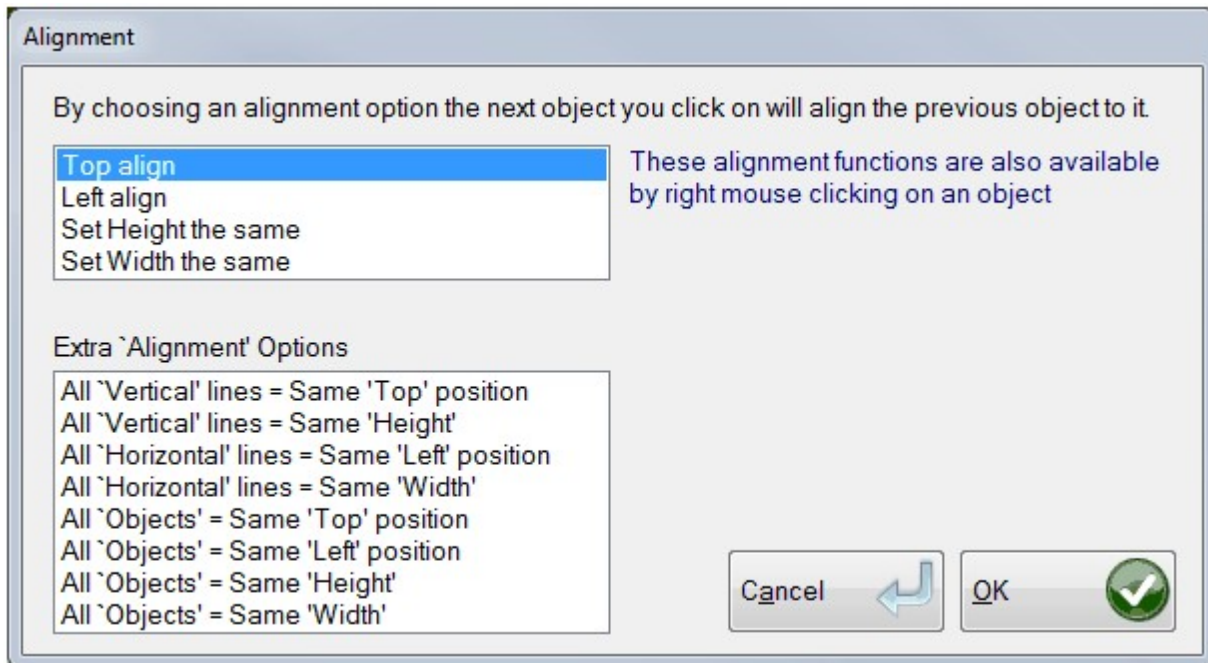
A screenshot of a dialog box titled 'Object Location and Size'. It contains four input fields: 'Left Position (X)' with the value 8.67, 'Width' with the value 5.79, 'Top Position (Y)' with the value 1.24, and 'Height' with the value 5.61. Each field is followed by the unit 'cm'. At the bottom, there are two buttons: 'Cancel' with a left-pointing arrow icon and 'Close' with a circular arrow icon.

Alignment

Use the Alignment option to make a number of positional adjustments quickly. You should save your report before doing any large adjustments, as an Alignment action cannot be undone!

The first four options on this window are also available by Right Clicking on an object on the design area.

To run any of the Extra Alignment Options, simply select one of the options, press OK and then click on an object.



Page Header

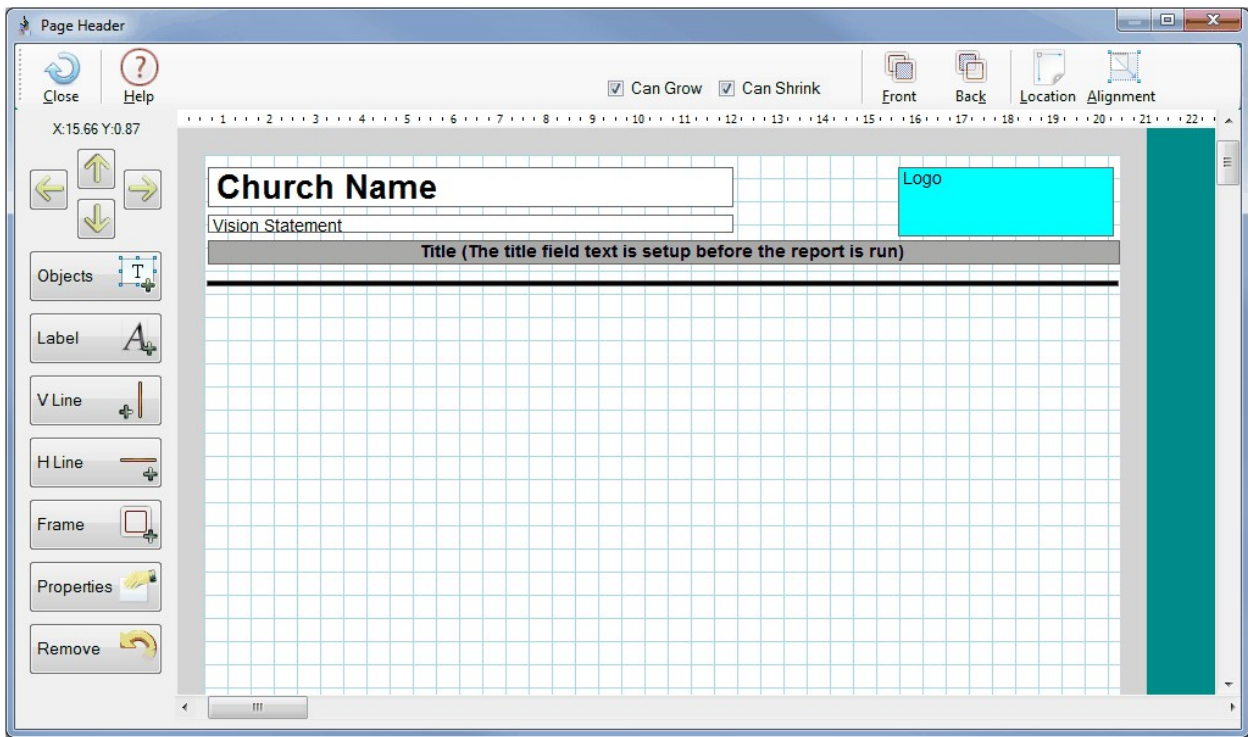
The Page Header object when added to a Custom Report appears at the top of the design area, just under the Report Header object if that is turned on. It is labeled as Page Header. The words Page Header will not print out on your final design report.

A Page Header is simply a bit of space at the top of every page, including the first page. If a report Header is enabled, that will be at the very top of the first page, with the Page Header appearing underneath it.

Double Clicking on the Page Header will open the Page Header in design mode, allowing you to add colours, boxes, Labels and some header specific Data Objects.

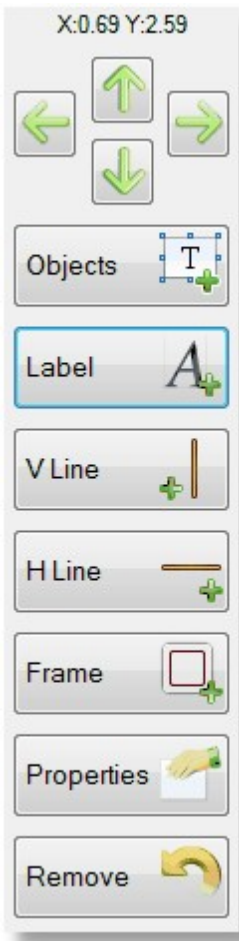


Click on each part of the Page Header Design Window below to learn more.



Side Bar

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Nudge

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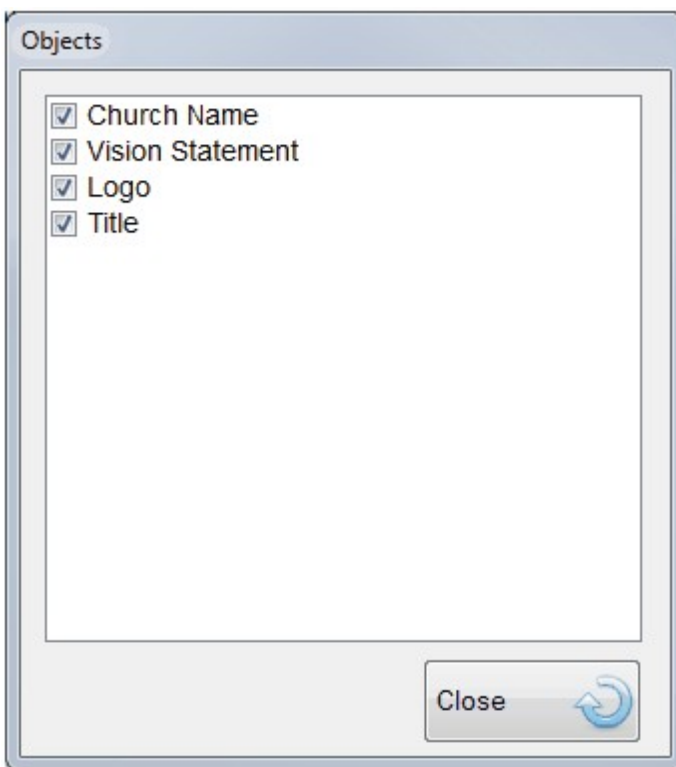
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Objects

The Objects window allows you to select the data objects that you want to include on your Report Header.

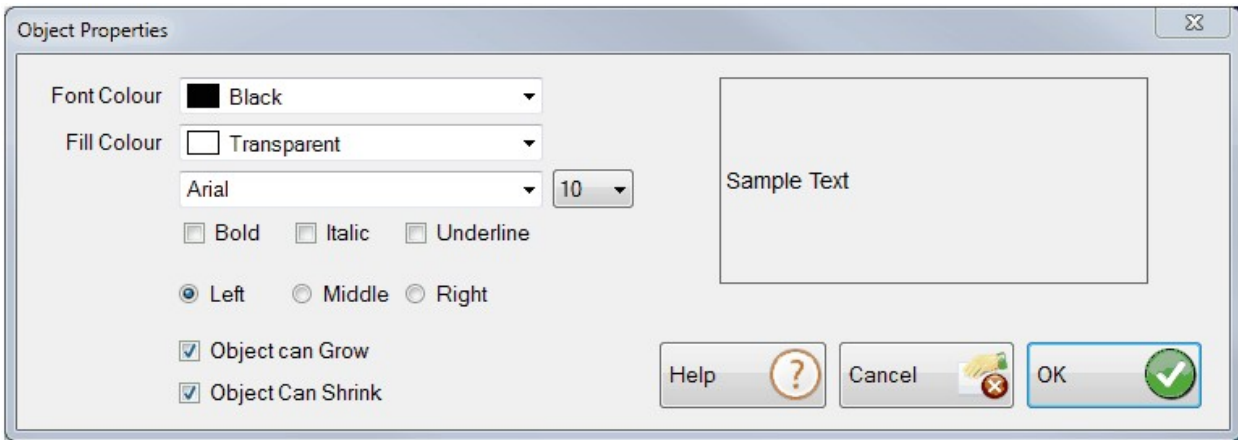


Click on each one below to learn more about each object and its properties.



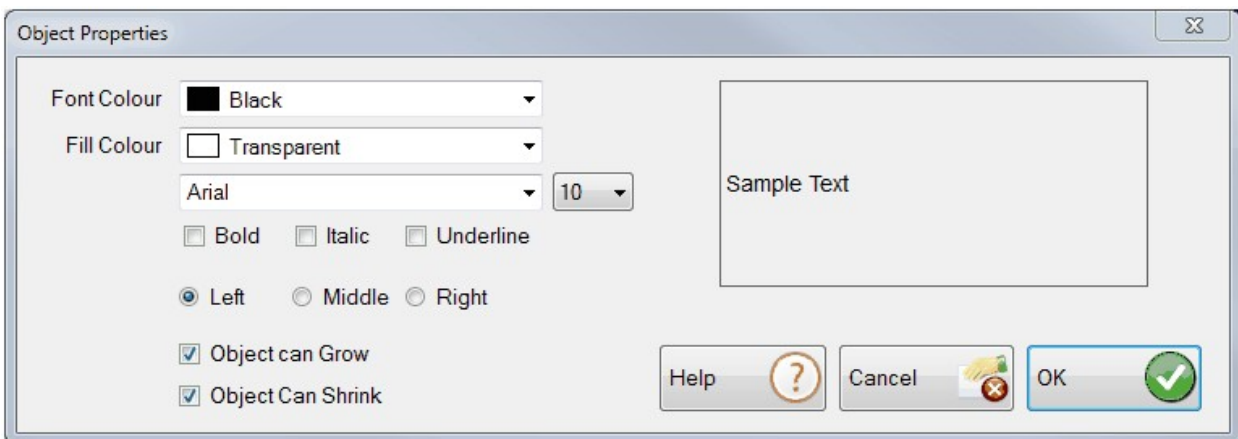
The Church Name Object shows the registered Church Name.

Double clicking on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for setting fonts, colours, alignment etc.



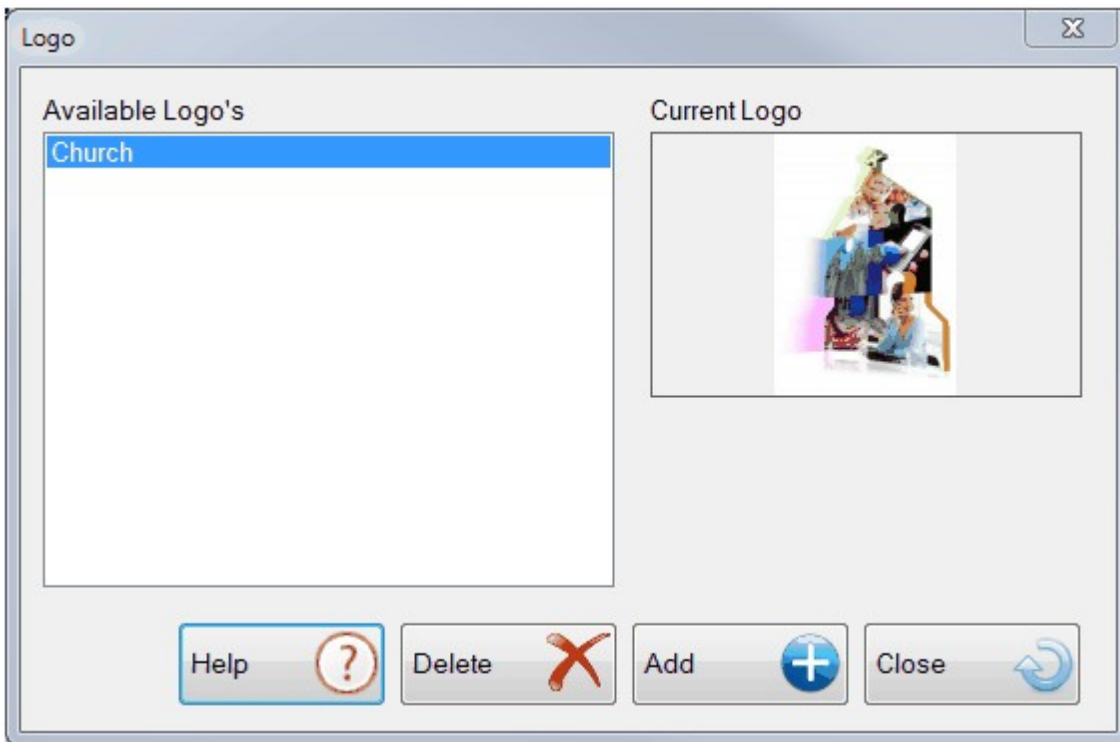
The Vision Statement Object shows the Vision Statement of the church as setup in the [Setup Vision](#) area.

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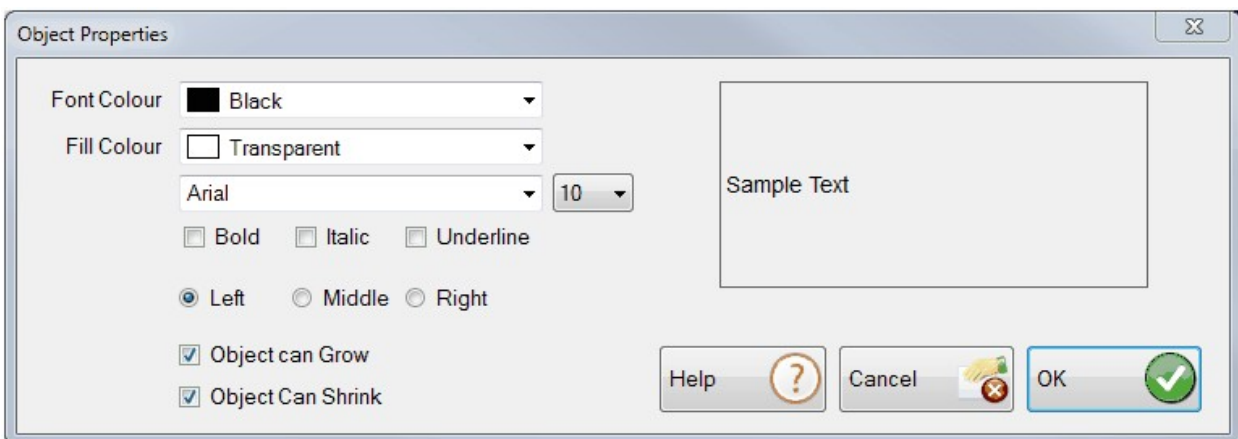
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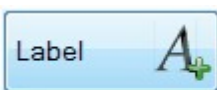


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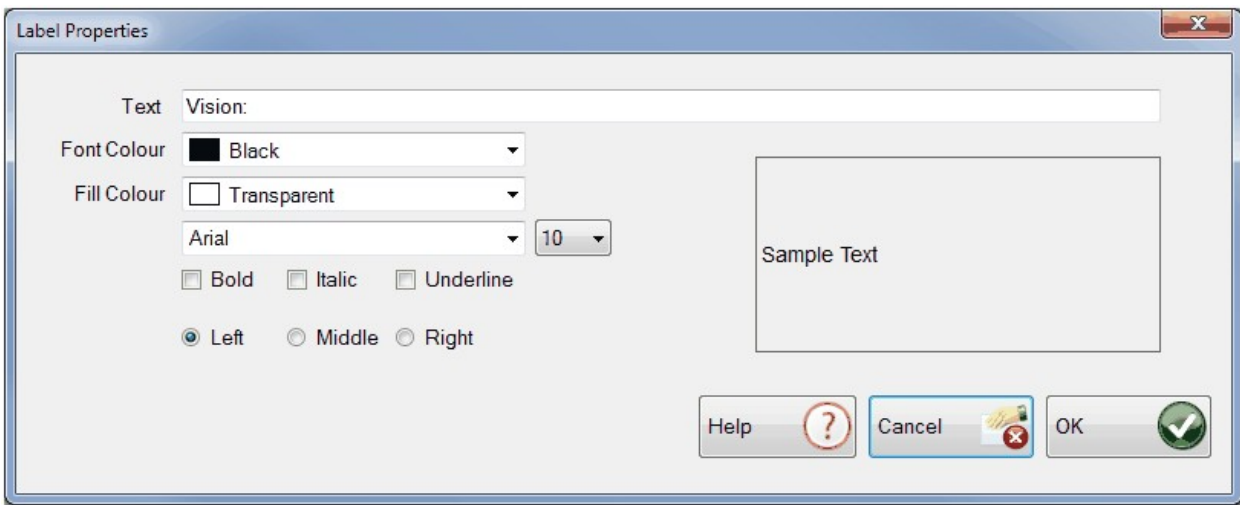


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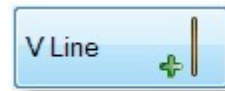
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V Line

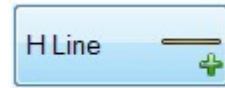
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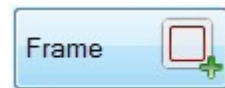
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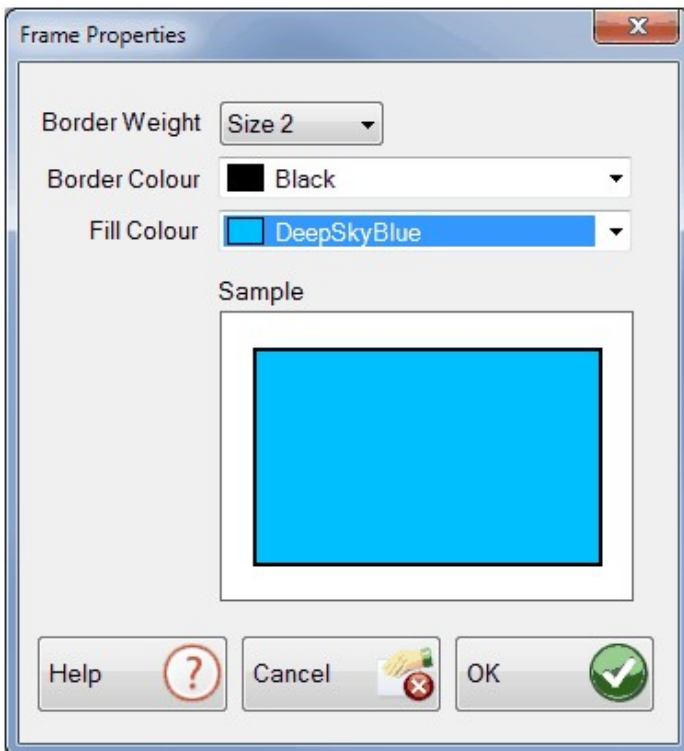
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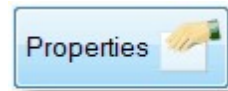


You can set Border Size and Colour, and Fill Colour for the Frame Object.



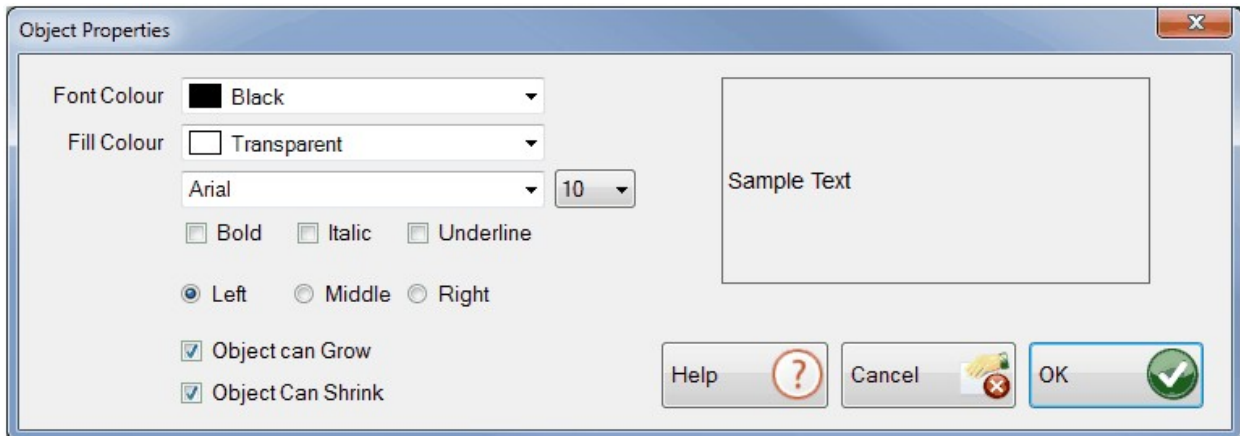
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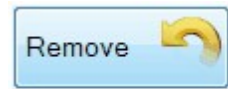
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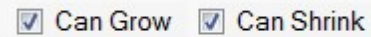
Remove

Remove the selected object from the design grid. You can also press [Objects](#), and un-tick the object that you want to remove.



Auto Size

By default, the Page header will Grow and Shrink as needed depending on the objects used. If you want to force a set size for this, untick these options as needed.



Front

Bring the currently selected object to the front of the page, this makes this object cover any objects that might be overlapping.



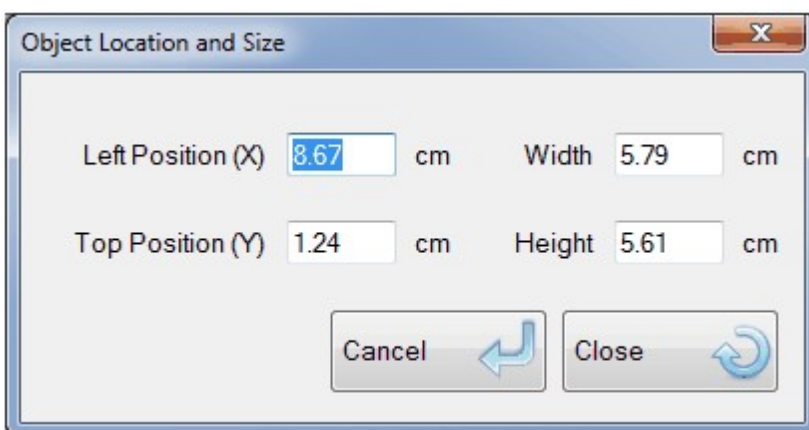
Back

Send the currently selected object to the back of the page, this makes this object sit behind or be covered by any overlapping objects.



Location

Use the Location window (shown below) to fine tune the size and position of the selected object.

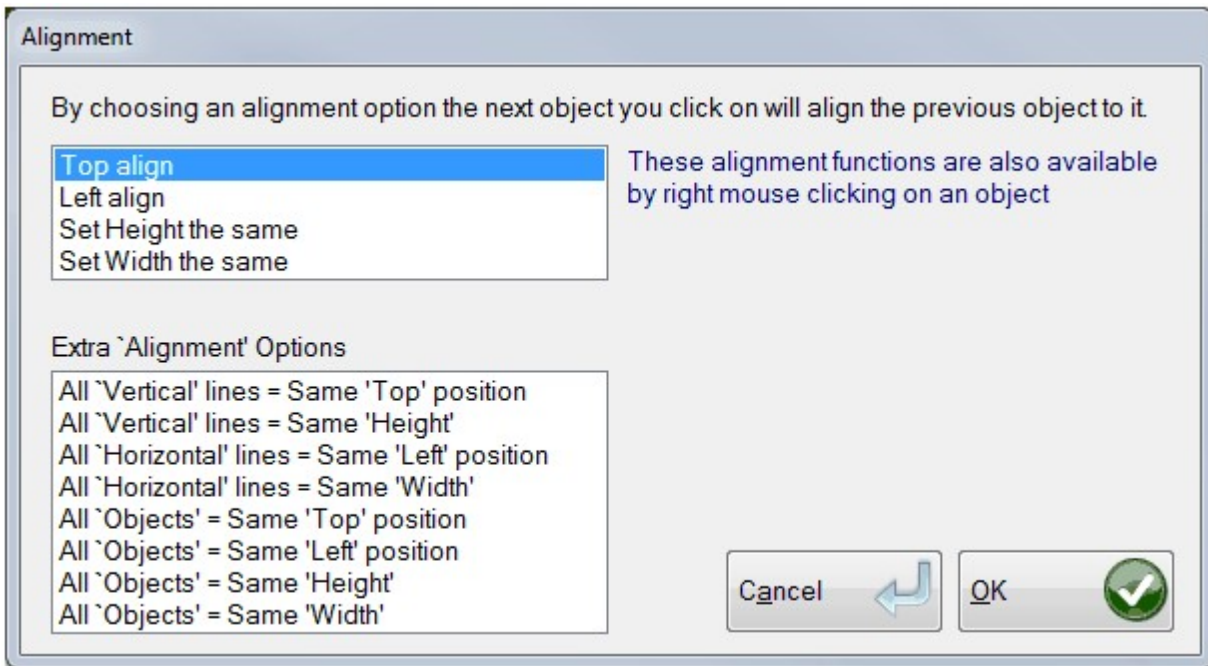


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Page Footer

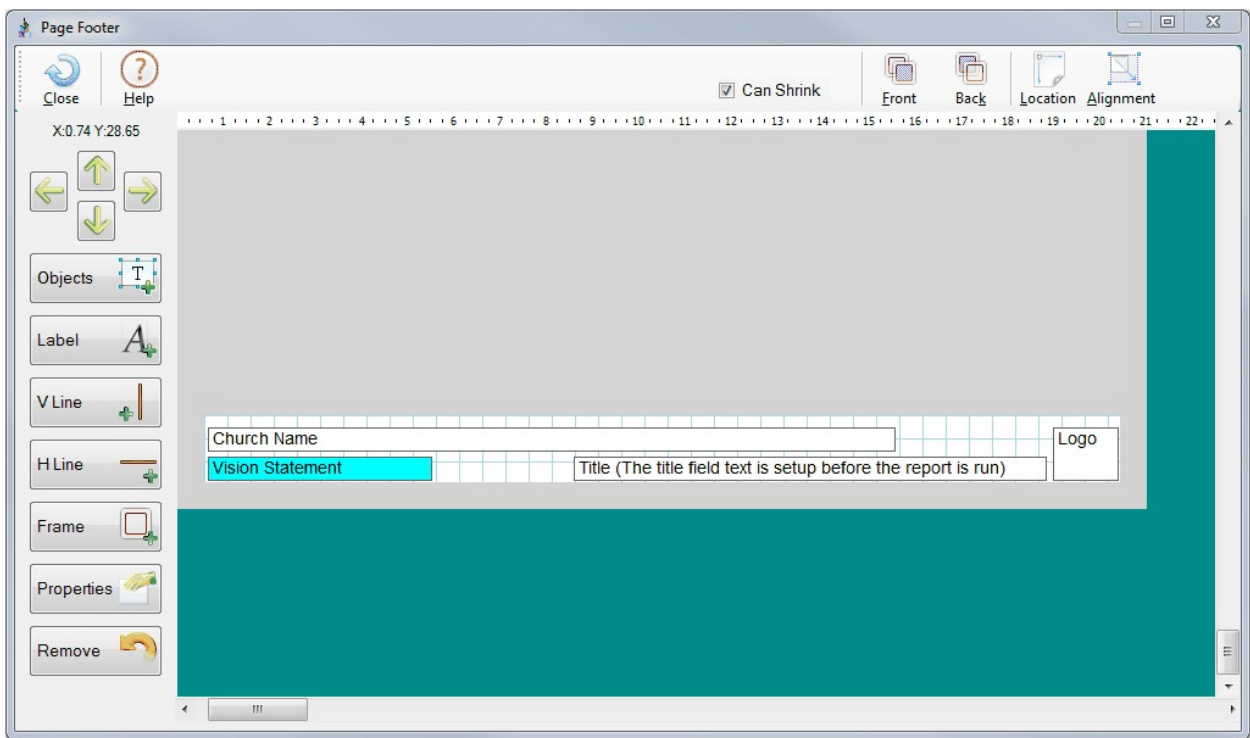
The Page Footer object when added to a Custom Report appears at the Bottom of the design area. It is labeled as Page Footer. The words Page Footer will not print out on your final design report.

A Page Footer is simply a bit of space at the bottom of every page, including the first page.

Double Clicking on the Page Footer will open the Page Footer in design mode, allowing you to add colours, boxes, Labels and some footer specific Data Objects.

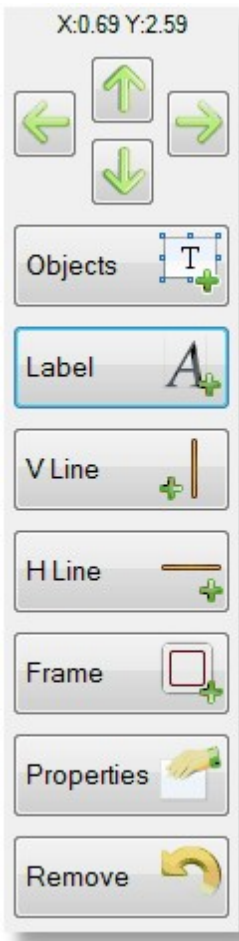


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Side Bar

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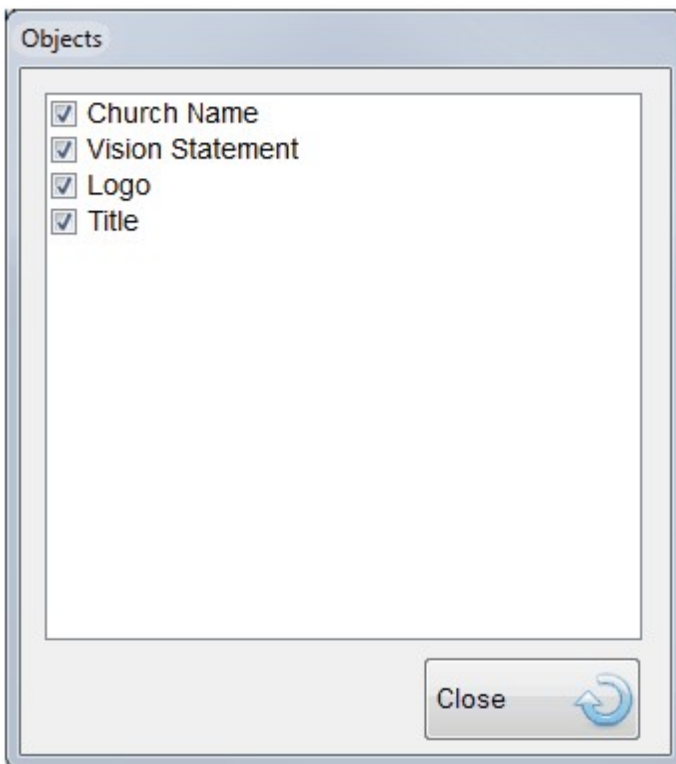
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Objects

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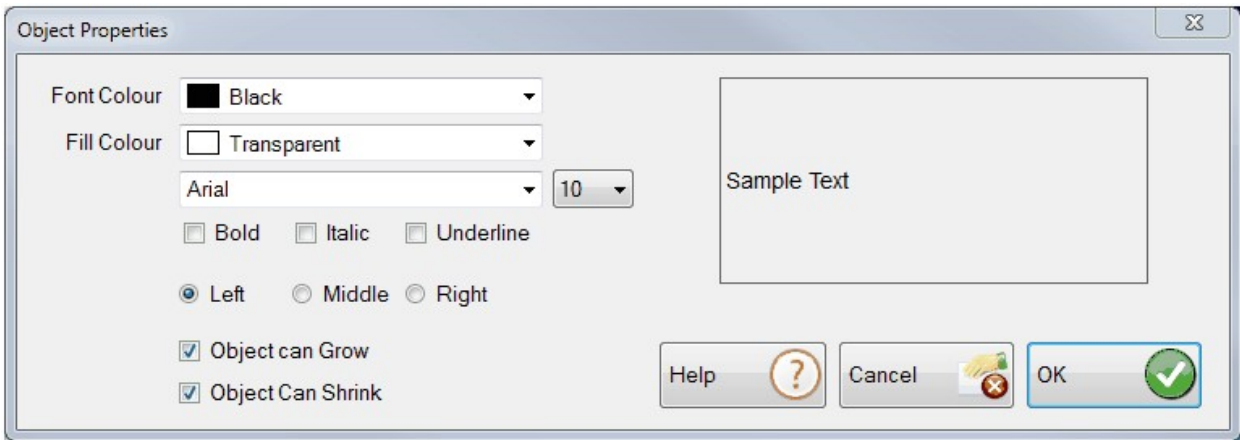


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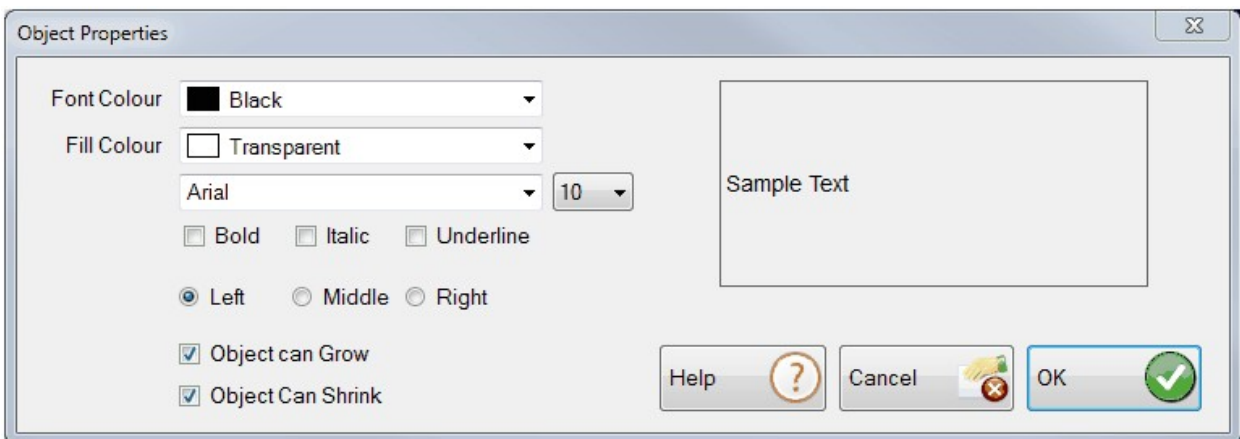
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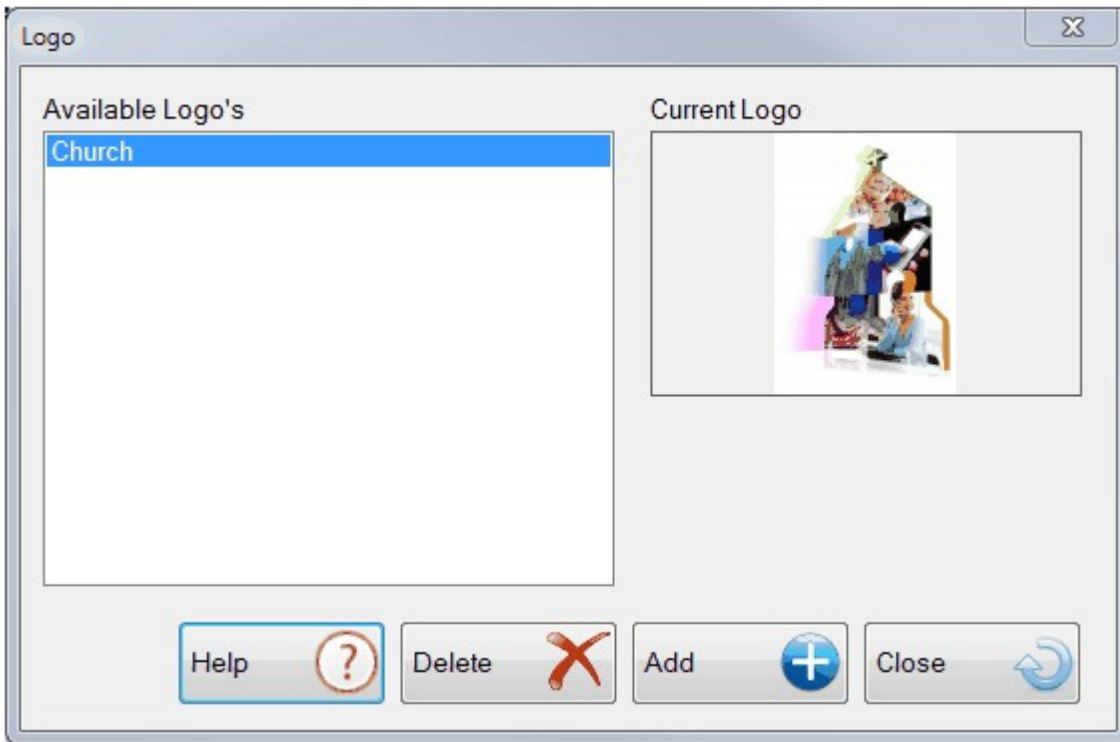
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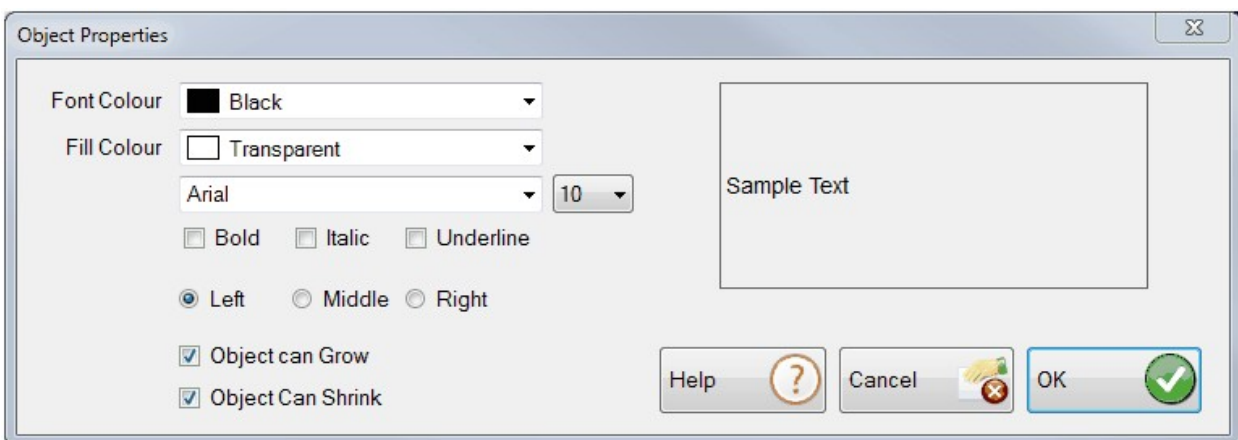
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Select your logo from the Available Logo's and press Close to add this to the Report Header. If you want to make another logo available to the reports area, press the Add Button.

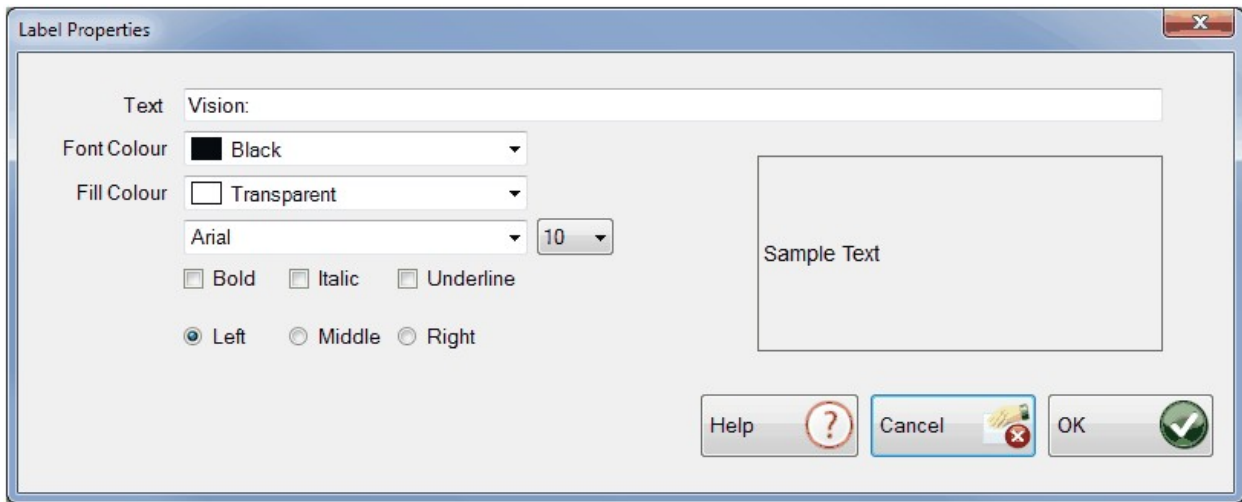
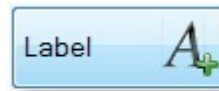
See [Add Logo](#) setup for more details.

The Title field accepts information from the Title Area of reporting. This object will get it's data from the [Report Title](#) area. Properties available for this object include all standard colour and font options.



Label

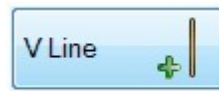
A Label is an object that allows you to simply type in some text and display it on the Report. Selecting Properties on a label opens up the following properties window.



You can Edit the Text for the label here, also set any standard Font property (Type, Colours, Alignment etc)

V Line

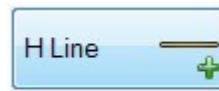
The Vertical Line Object places a Vertical line on the design grid. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line.



Double clicking on a line will open the [Line Properties](#) window.

H Line

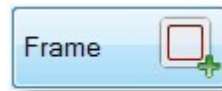
The Horizontal Line Object places a Horizontal line on the design grid. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line.



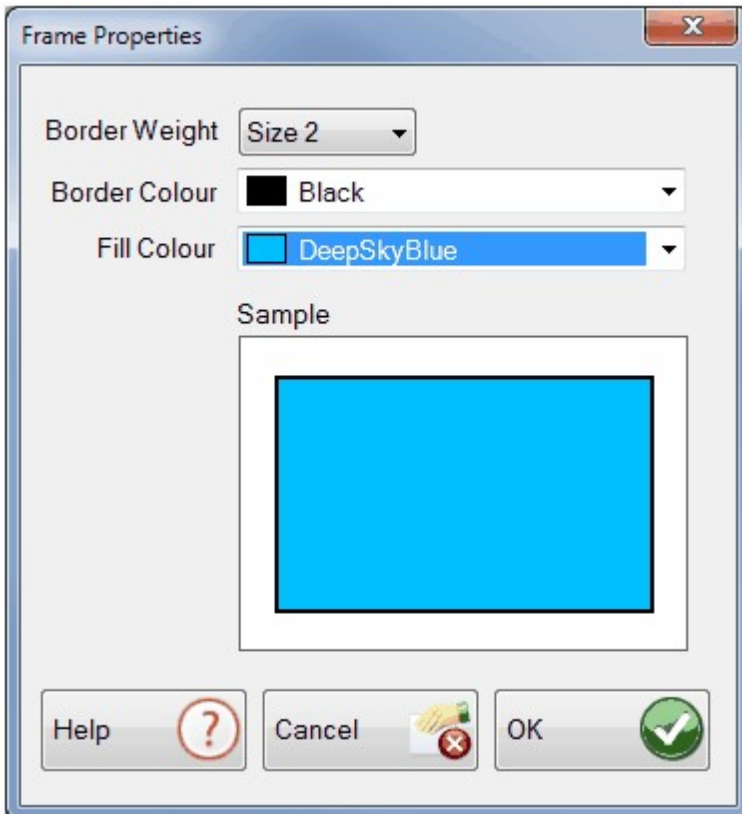
Double clicking on a line will open the [Line Properties](#) window.

Frame

The Frame Object is simply a Rectangle that you can use to provide highlighting or boxing of a section. This object cannot auto grow, so you need to consider how information will display alongside or on top of this object.



You can set Border Size and Colour, and Fill Colour for the Frame Object.



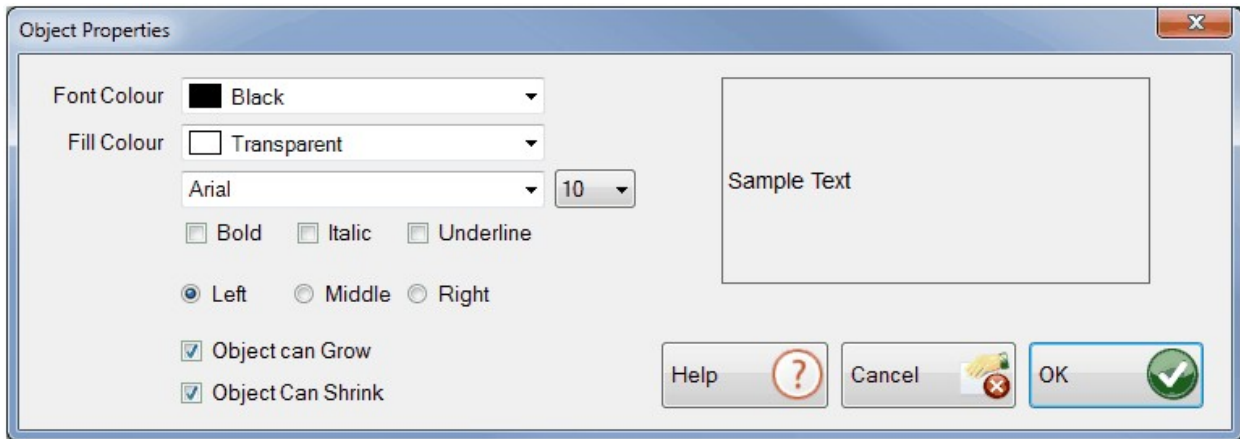
Properties

To open a properties option window for any object, select that object and press the Properties Button, or double click on the object that you want to see the properties window for.



A Standard Field property window is shown below. The options here are identical for the following Objects:

Church Name, Vision Statement and Title.



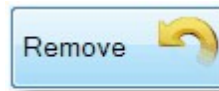
Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size it'self in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

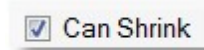
Remove

Remove the selected object from the design grid. You can also press [Objects](#), and un-tick the object that you want to remove.



Auto Size

By default, the page footer will Shrink as needed depending on the objects used. If you want to force a set size for this, untick this option.



Front

Bring the currently selected object to the front of the page, this makes this object cover any objects that might be overlapping.



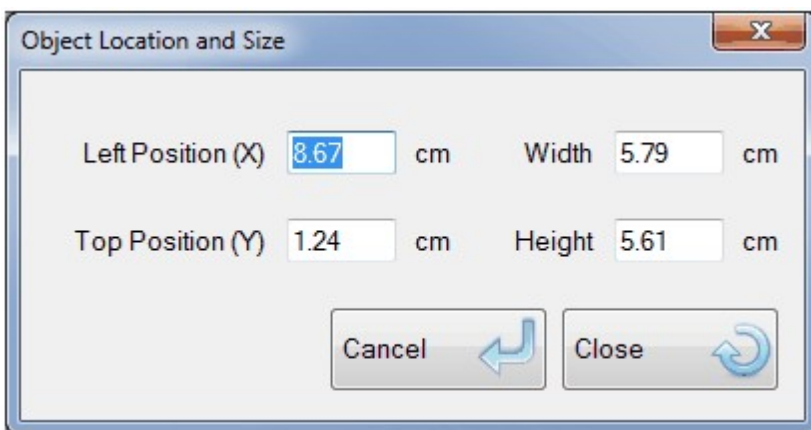
Back

Send the currently selected object to the back of the page, this makes this object sit behind or be covered by any overlapping objects.



Location

Use the Location window (shown below) to fine tune the size and position of the selected object.

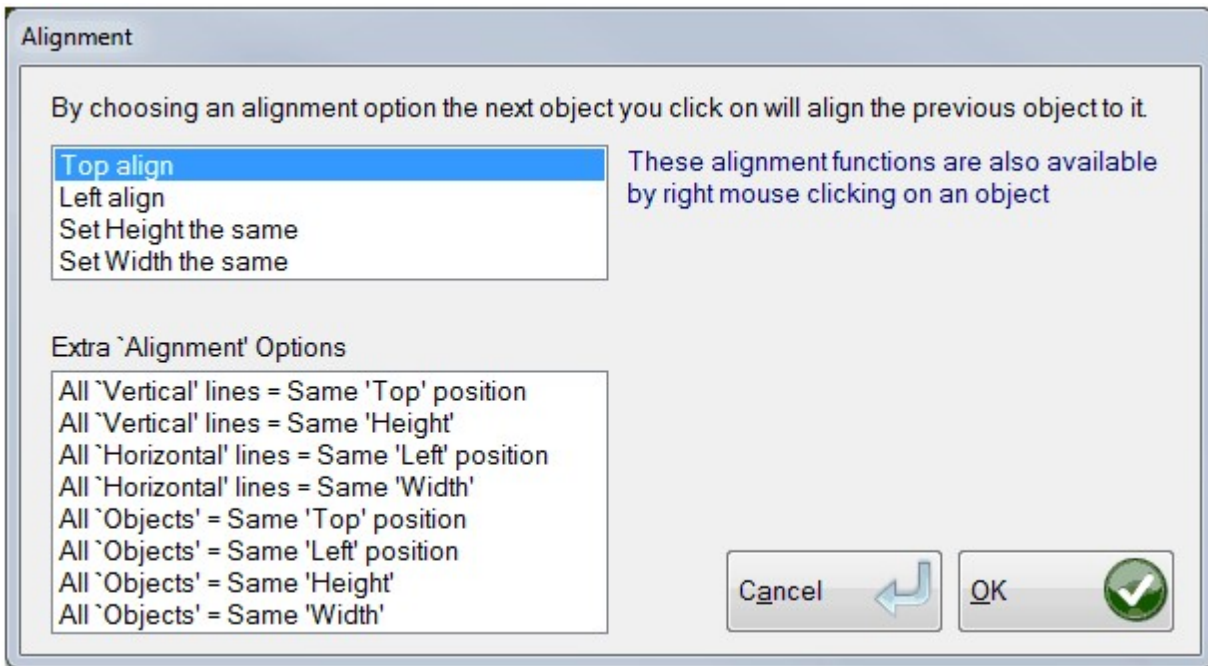


Alignment

Use the Alignment option to make a number of positional adjustments quickly. You should save your report before doing any large adjustments, as an Alignment action cannot be undone!

The first four options on this window are also available by Right Clicking on an object on the design area.

To run any of the Extra Alignment Options, simply select one of the options, press OK and then click on an object.



Introduction to Sub Reports

There are 3 different methods of putting data onto a Custom Report. Main Data Objects, Grouped Data Objects and Sub Reports.

Main Data Objects

Main Data Objects are pretty straight forward. They simply display exactly what they say they will display. These objects are listed below.

- Surname
- Portrait
- Primary Adult Name
- Secondary Adult Name
- Phone
- Family Mobile
- Family Email Address
- Family Fax
- Residential Street Line 1
- Residential Street Line 2
- Residential Suburb
- Residential Postcode
- Residential State
- Residential Country
- Map Number
- Map Reference
- Postal Street Line 1
- Postal Street Line 2
- Postal Suburb
- Postal Postcode
- Postal State
- Postal Country
- Family Condition Status

Grouped Data Objects

A Grouped Data Object is rather like a sub report, in that it contains a number of data fields usually combined with a person's name. A Grouped Data Object contains what we call "smarts" in that these objects have some programming behind them to make the display of this information easy and trouble free. These are listed below.

- Adult Names Combined
- Children Names
- Address
- Family Details
- Personal Details

Sub Reports

Sub Reports are by far the most powerful data object in Custom Reports, but with great power comes complexity. In a nutshell, if you want to use a Sub Report to display any more information than what is available with Grouped and Standard Data Objects shown above, then you will need to design a sub report. We have made this task far easier than in earlier versions of Pastoral Care, but you still have to design your Sub Report as well as design your main report.

Sub Report topics are expansive. See [Data Objects in Sub Reports](#) for a complete list of the data areas covered in Sub Reports.

Saving and Using Sub Reports

In previous versions of Pastoral Care, you had to design your sub report separately, and save it separately, then add it to your main report. Now you do not have to save your report separately and link it in later. It is all done in the main Custom Report design window. All you need to do is to decide which type of sub report to use. You design your sub reports within your main report, and it is automatically linked in.

This method makes the process allot smoother, but there is a downside. You can cannot re-use a sub report again. It is designed within the main report, and it stays with that main report.

There are two different types of sub reports, these are essentially the same as previous versions. Click on each type below for more details.

[Sub Report Within Data Section](#)

[Sub Report at end of Data Section](#)

Data Objects in Sub Reports

The following areas of Pastoral Care can be reported on by using Sub Reports.



Click on each area to find out the field lists that are included in each area.

[Personal Details](#)

[Status](#)

[Individual Groups](#)

[Ministry](#)

[Medical](#)

[Relationship](#)

[Individual Dates](#)

[Flexi Fields](#)

[SMS List](#)

[Email List](#)

[Other Contact](#)

[Family Groups](#)

[Family Events](#)

[Family Dates](#)

[Visitation](#)

[Family File Memo](#)

[Family Notes](#)

Personal Details

The Personal Details Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Prefer / Actual Name

This is a combination object that displays both the Preferred and Actual name of the person.

- Sub Report Header
- Individual Name
- Individual Condition
- Prefer/Actual Name
- Gender
- Mobile
- Email
- Other Surname
- Middle Name
- Occupation
- Birth Date
- School Year
- Title
- Individual Condition
- Business Phone
- Business Email
- Business Fax
- Bar Code

Status

The Status Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

- Sub Report Header
- Individual Name
- Status List

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Individual Name

Print the person's name so that you can see their data associated with their name.

Status List

Tick this option to display the Status information on the sub report. If you do not tick this, then having this sub report object enabled is really just a waste of space, as this object lists the information specific to the sub report area.

Individual Groups

The Individual Groups Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

- Sub Report Header
- Individual Name
- Group List

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Individual Name

Print the person's name so that you can see their data associated with their name.

Group List

Tick this option to display the Group participation information on the sub report. If you do not tick this, then having this sub report object enabled is really just a waste of space, as this object lists the information specific to the sub report area.

Ministry

The Ministry Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

- Sub Report Header
- Individual Name
- Active Ministry
- Potential Ministry

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Individual Name

Print the person's name so that you can see their data associated with their name.

Active / Potential Ministry

Tick these options to display the Ministry participation information on the sub report. If you do not tick either of these, then having this sub report object enabled is really just a waste of space, as this object lists the information specific to the sub report area.

Medical

The Medical Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

- Sub Report Header
- Individual Name
- Medical List

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Individual Name

Print the person's name so that you can see their data associated with their name.

Medical List

Tick this option to display the Medical information on the sub report. If you do not tick this, then having this sub report object enabled is really just a waste of space, as this object lists the information specific to the sub report area.

Relationship

The Relationship Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

- Sub Report Header
- Individual Name
- Relationship List

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Individual Name

Print the person's name so that you can see their data associated with their name.

Relationship List

Tick this option to display the Relationship information on the sub report. If you do not tick this, then having this sub report object enabled is really just a waste of space, as this object lists the information specific to the sub report area.

Individual Dates

The Individual Dates Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

- Sub Report Header
- Individual Name
- Individual Date Details

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Individual Name

Print the person's name so that you can see their data associated with their name.

Individual Date Details

Tick this option to display the Individual Date information on the sub report. If you do not tick this, then having this sub report object enabled is really just a waste of space, as this object lists the information specific to the sub report area.

Flexi Fields

The Flexi Field Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

- Sub Report Header
- Individual Name
- Flexi Field Details

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Individual Name

Print the person's name so that you can see their data associated with their name.

Flexi Field Details

Tick this option to display the Flexi Field information on the sub report. If you do not tick this, then having this sub report object enabled is really just a waste of space, as this object lists the information specific to the sub report area.

SMS List

The SMS List Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

- Sub Report Header
- Individual Name
- SMS List

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Individual Name

Print the person's name so that you can see their data associated with their name.

SMS List

Tick this option to display the SMS List participation information on the sub report. If you do not tick this, then having this sub report object enabled is really just a waste of space, as this object lists the information specific to the sub report area.

Email List

The Email List Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

- Sub Report Header
- Individual Name
- Email List

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Individual Name

Print the person's name so that you can see their data associated with their name.

Email List

Tick this option to display the Email List participation information on the sub report. If you do not tick this, then having this sub report object enabled is really just a waste of space, as this object lists the information specific to the sub report area.

Other Contact

The Other Contact Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

- Sub Report Header
- Contact Method
- Phone

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Contact Method

Print the Contact Method description on the report.

Phone

Tick this option to display the Other Contact PHONE information on the sub report.

Name Object

As this is a family object, there is no Individual Name object.

Family Groups

The Family Groups Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

- 
- Sub Report Header
 - Family Group

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Family Group

Tick this option to display the Family Group participation information on the sub report. If you do not tick this, then having this sub report object enabled is really just a waste of space, as this object lists the information specific to the sub report area.

Name Object

As this is a family object, there is no Individual Name object.

Family Events

The Family Events Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

- 
- Sub Report Header
 - Date
 - Event

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Date

Tick this option to display the Event Date on the sub report.

Event

Tick this option to display the Event Description on the sub report.

Name Object

As this is a family object, there is no Individual Name object.

Family Dates

The Family Events Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!



Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Date

Tick this option to display the Family Date on the sub report.

Description

Tick this option to display the Family Date Description on the sub report.

Tag

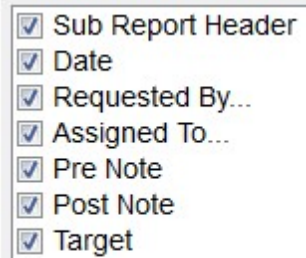
Tick this option to display the Family Date TAG field on the sub report.

Name Object

As this is a family object, there is no Individual Name object.

Visitation

The Visitation Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!



Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Date

Tick this option to display the Visitation Date on the sub report.

Requested By

Tick this option to display the Requested By field on the sub report.

Assigned To

Tick this option to display the Assigned To field on the sub report.

Pre Note

Tick this option to display the Visitation Pre-Note field on the sub report.

Post Note

Tick this option to display the Visitation Post Note field on the sub report.

Target

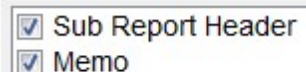
Tick this option to display the Visitation Target field on the sub report.

Name Object

As this is a family object, there is no Individual Name object.

Family File Memo

The Family File Memo Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!



Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

Memo

Tick this option to display the Family File Memo on the sub report.

Name Object

As this is a family object, there is no Individual Name object.

Family Notes

The Family Notes Sub Report has the following fields available to be included on your sub report. To include a data field, just tick it!

- Sub Report Header
- General Family Notes
- Visitation Notes
- Personal Notes

Sub Report Header

This object will print out at the top of each Sub Report instance. Once per family, or once per Individual if a report is run in Individual Mode.

General Family Notes

Tick this option to display the General Family Notes stored in the Family Editor Notes editor

Visitation Notes

Tick this option to display the Visitation Notes stored in the Family Editor Notes editor

Personal Notes

Tick this option to display the notes on each person stored in the Family Editor Notes editor. This object includes the person's name that the notes are saved for.

Name Object

As this is a family object, there is no Individual Name object.

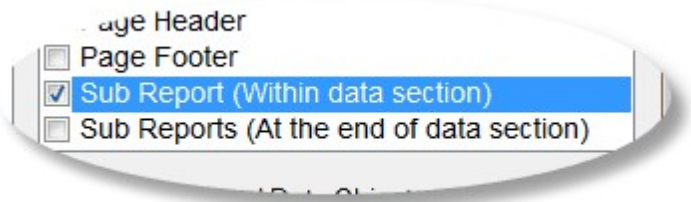
Sub Report Within Data Section

The Sub Report within a data section allows you take a report on any [Data Objects in Sub Reports](#) and insert that sub report anywhere you like inside your Custom Report design. This gives you the flexibility of **width** design, and **placement** in any location. See also [Sub Report Design Window](#) for more information on this feature. See also [Sub Report at end of Data Section](#) for a variation on the sub report object.

To create one of these sub reports, follow these easy steps.

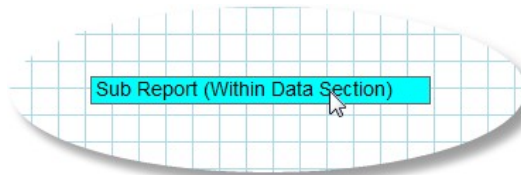
Step 1

Select the Sub Report Within Data Section object from the [Page Objects](#) section of the Object list.



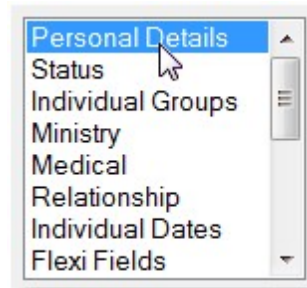
Step 2

Double Click on the Sub Report Object that has been placed on the Report Design Grid



Step 3

Select the area of interest that you want to display information from. (See [Data Objects in Sub Reports](#))

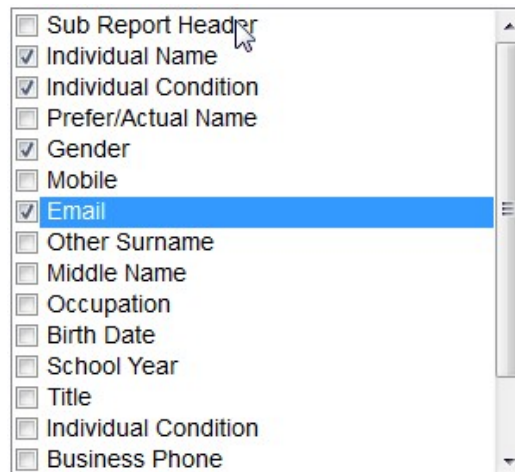


Step 4

Add fields from the available objects list for your selected area of interest, move and place them on your sub report where you want them and press Close on the toolbar to return to the main Custom Report design window.



Pressing the Objects button will open up the list of fields for the selected area of interest.



Sub Report at end of Data Section

Introduction

The Sub Report at end of Data Section allows you to add more than 1 Sub Report object to your main Custom Report. You can use only 1 [Sub Report Within Data Section](#), however the Sub Reports at the end of the data section can have up to 14 reports / areas of interest.

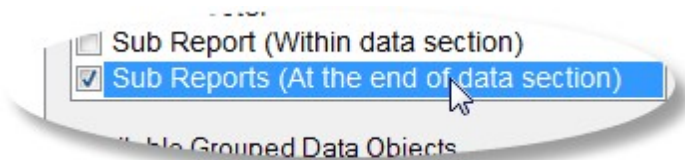
For more information on Sub Report design, see the [Sub Report Design Window](#) for Sub Reports Within Data Section. This has more information on the use of this interface.

Each Area of Interest in these sub reports are identical to the [Data Objects in Sub Reports](#) found in the the [Sub Report Within Data Section](#). That is, all sub report objects and properties and fields available etc are the same for both Sub Report Types, the difference between the 2 different types of sub reports is simply where they can appear within your report.

To create one of these sub reports at the end of the Data Section, follow these easy steps.

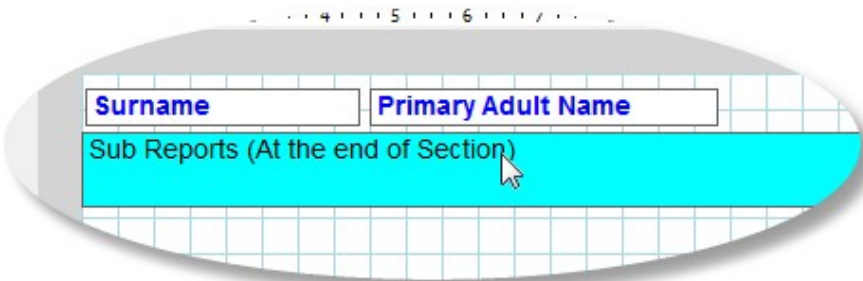
Step 1

Select the Sub Report at end of Data Section object from the [Page Objects](#) section of the Object list.



Step 2

Double Click on the Sub Report Object that has been placed on the Report Design Grid. This type of Sub Report will appear underneath the bottom most object on your report automatically.



Step 3

Tick EACH area of interest that you want to display information from. For each area of interest you tick, you will be able to select it and add the objects you need for each area.



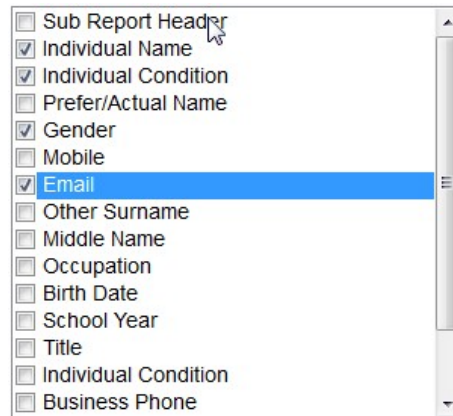
This is the main point of difference in using the 2 different sub report options. In this sub report type, you have to tick the various areas you are wanting to include on your report, where as the Within Data Section sub report can only show one area of interest.

Use the Up and Down arrows to change the order of the items to display at the end of each family record.

Note: Each item you tick becomes an extra sub report object. 1 tick = 1 sub report, 10 ticks will create 10 sub reports! (See [Data Objects in Sub Reports](#))

Step 4

For EACH area of interest ticked in step 3, select that area, and press Objects to add fields from the available objects list for your selected area of interest. Move and place these on your sub report where you want them. This needs to be done for each area you have ticked.

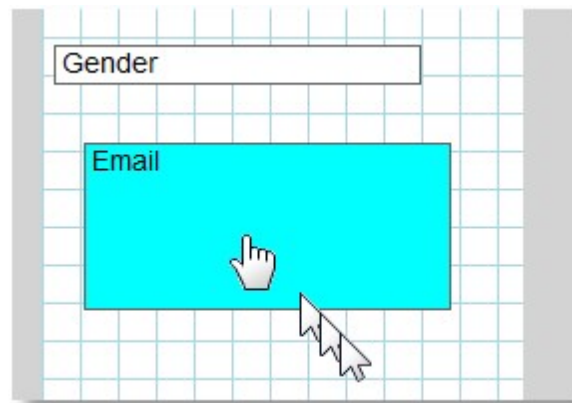


Pressing the Objects button will open up the list of fields for the selected area of interest.

Step 5

Use the design grid to **move and size** the objects you have placed in step 4. and press Close when finished. You can then preview your report from the Main Design window by pressing the preview button.

See [Moving Objects](#), [Sizing Objects](#), and [Design Tips](#) for more information on layouts!

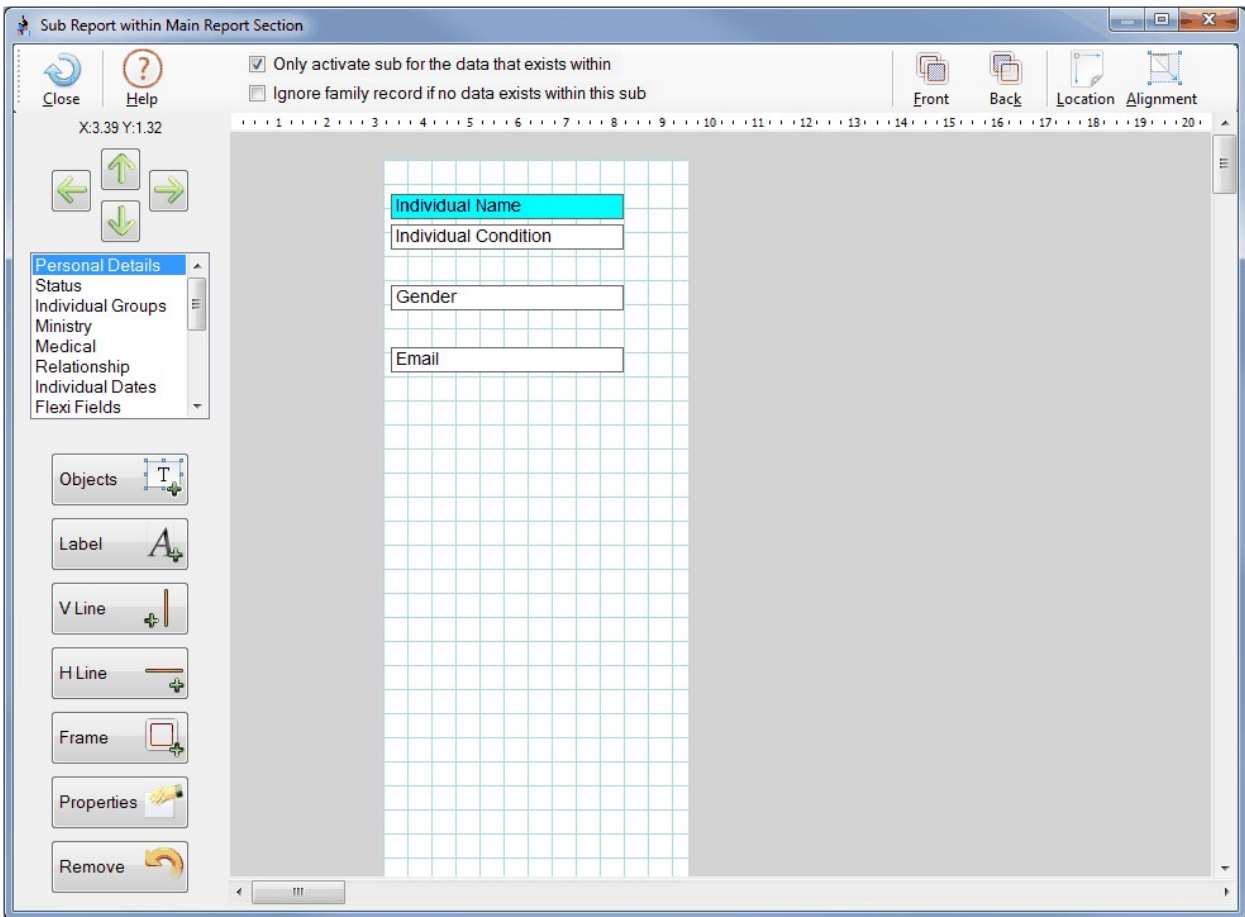


Sub Report Design Window

Shown below is the Sub Report Within Data Section design window. See also [Sub Report Within Data Section Introduction](#) for more information on this area.



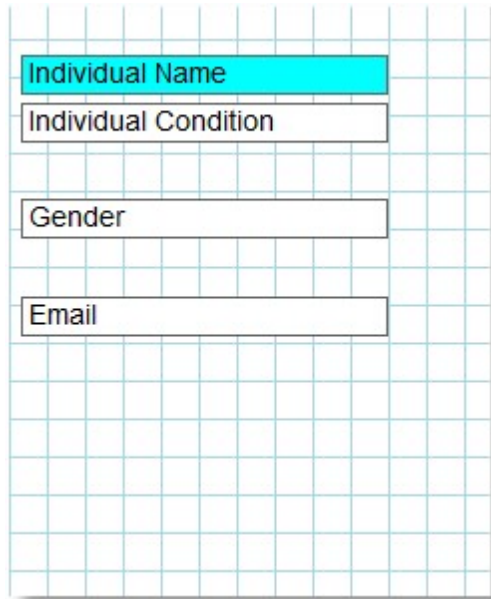
Click on each part of this window to learn more.



Design Grid

Use the design grid to arrange the selected objects for use in your sub report. Double Clicking on an object will open up properties for fonts and colours etc.

See Also [Design Tips](#), [Sizing Objects](#), [Moving Objects](#) and [Selected Object](#) for more information on using this design area.

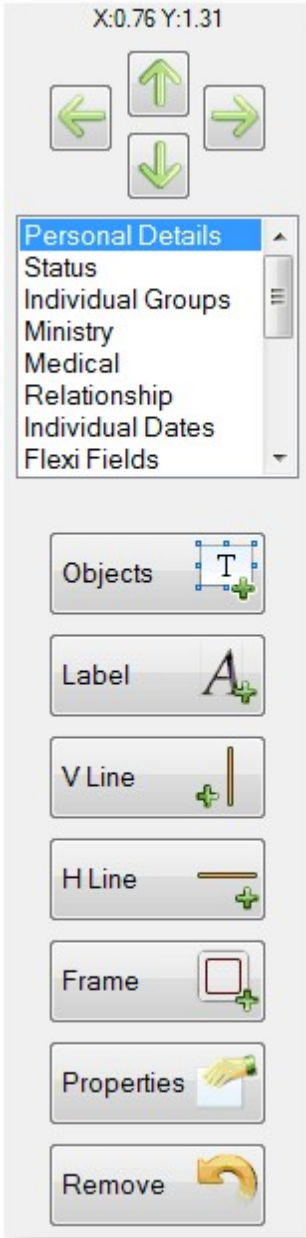


Side Bar

The following buttons make up the left side of the Custom Directory Sub Report within Data Section window.



Click on each item for more information.



Area of Interest

Select the area of interest for this single Sub Report. See [Data Objects in Sub Reports](#) for a complete list of each area and the fields available to each area.



Nudge

Use the 4 nudge buttons to push the currently selected object in the direction of the arrow you are pressing.

When an object is selected, your arrow keys on the keyboard of your computer also do the same function as the nudge buttons here.



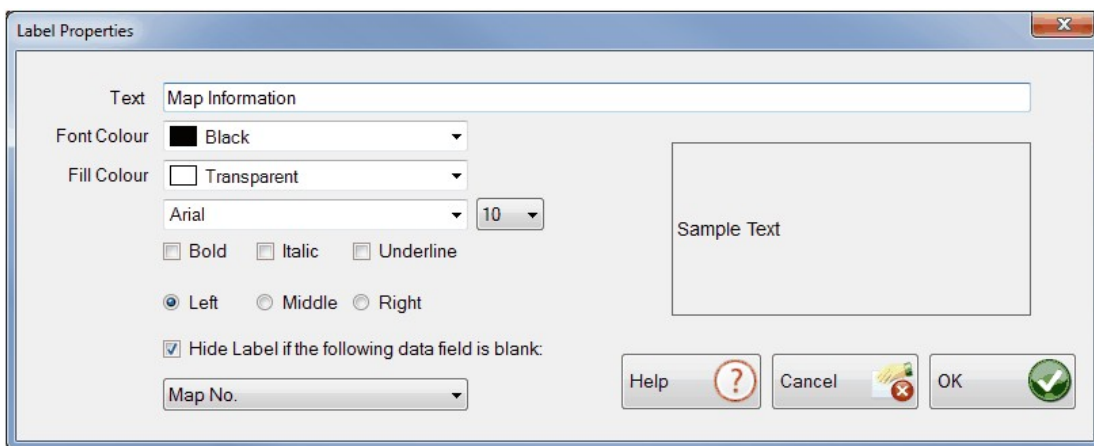
Above the arrows is the position of the Top Left corner of the selected object displayed in CM.

Objects

The Objects window allows you to select the data objects that you want to include on your sub report. The fields available will be dependent on what [Area of Interest](#) you have selected. See [Data Objects in Sub Reports](#) for more information on all the different available Data Objects available for Sub Reports.

Label

A Label is an object that allows you to simply type in some text and display it on the Directory/Report. Selecting Properties on a label opens up the following properties window.



You can Edit the Text for the label here, also set any standard Font property (Type, Colours, Alignment etc)

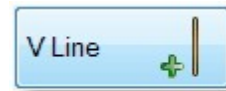
Hide Label Option

If you tick this option (as in our example above) you are linking the display of the Label Text to the existence of information in a field. In our example, if there is no Map Reference for a family, then the Label "Map Information" would not be shown for that family.

V Line

The Vertical Line Object places a Vertical line on the design window. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line. Vertical lines are repeated down the page for each record.

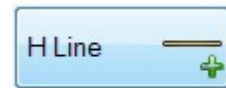
Double clicking on a line will open the [Line Properties](#) window.



H Line

The Horizontal Line Object places a Horizontal line on the design window. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line. Horizontal Lines are repeated for each record.

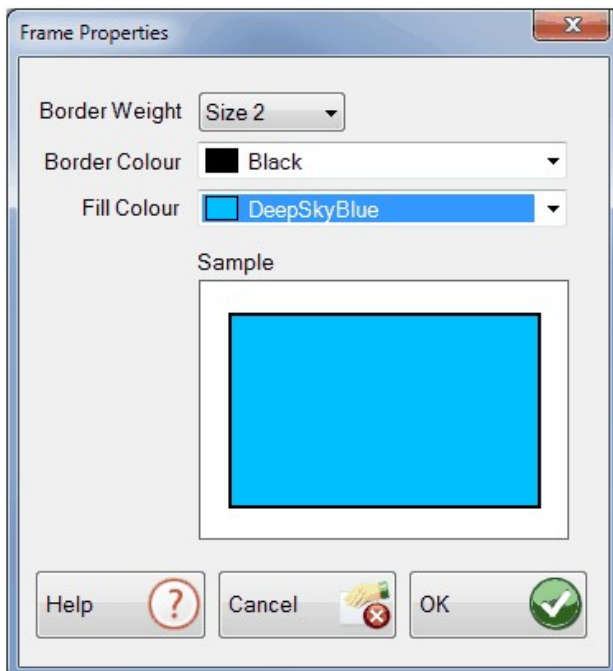
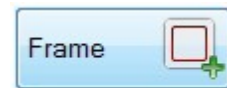
Double clicking on a line will open the [Line Properties](#) window.



Frame

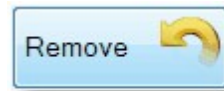
The Frame Object is simply a Rectangle that you can use to provide highlighting or boxing of a section. This object cannot auto grow, so you need to consider how information will display alongside or on top of this object.

You can set Border Size and Colour, and Fill Colour for the Frame Object.



Remove

Remove the selected object from the design grid. You can also press [Objects](#), and un-tick the object that you want to remove.



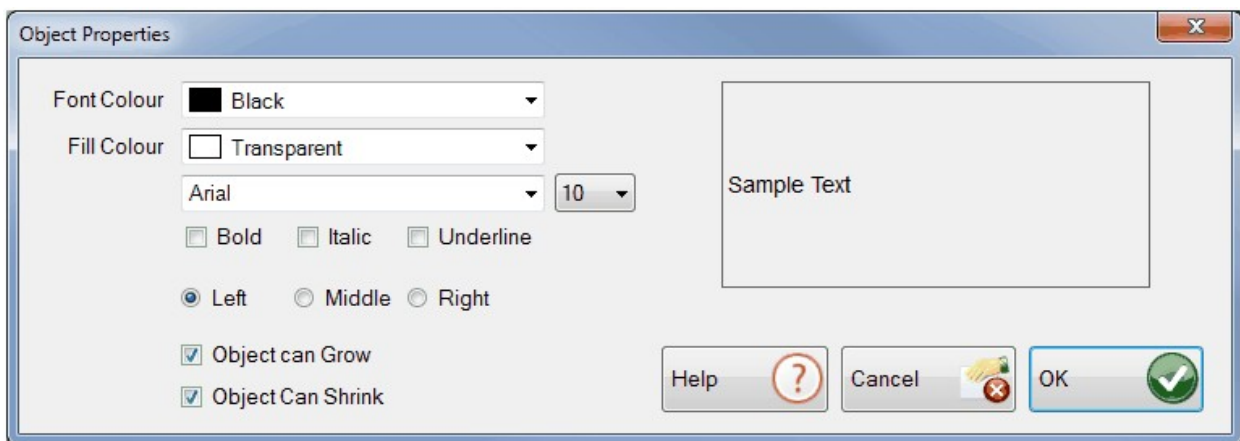
Properties

This section shows all Property windows for Custom Directory and Custom Report objects. To open a properties option window for any object, select that object and press the Properties Button, or double click on the object that you want to see the properties window for.



Standard Object Properties

A Standard Field property window is shown below. The options here are identical for almost all of the Sub Report data objects.

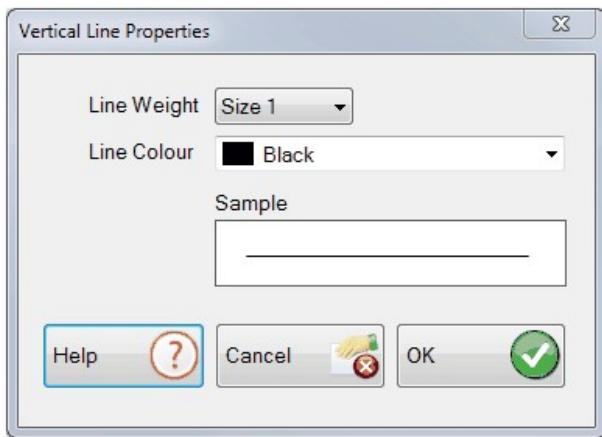


Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size itself in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

Line Properties



You can select different Line Weights and Line Colours from the Line Properties window.

Toolbar

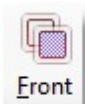
Shown below are each of the Toolbar options for the Sub Report design areas.

Only activate sub for the data that exists within

Tick this option to turn the Sub Report on only for the information fields that have data in them, and to ignore / remove redundant fields for the current record.

Ignore family record if no data exists within this sub

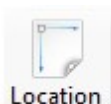
If this sub report has no data to display, then do not include the current record (Family or Individual) on the report at all.



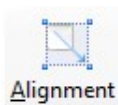
Bring the selected object in front of all other objects. See [Front](#)



Send the selected object behind all other objects. See [Back](#)



Use [Location](#) to fine tune the size and position of the selected object.



Use the [Alignment](#) button to align the selected object to another object as well as bulk moving a range of objects.

Front

Bring the currently selected object to the front of the page, this makes this object cover any objects that might be overlapping.



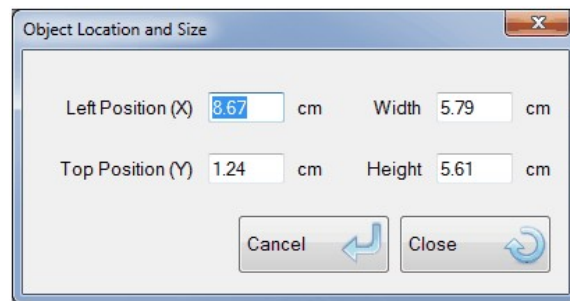
Back

Send the currently selected object to the back of the page, this makes this object sit behind or be covered by any overlapping objects.



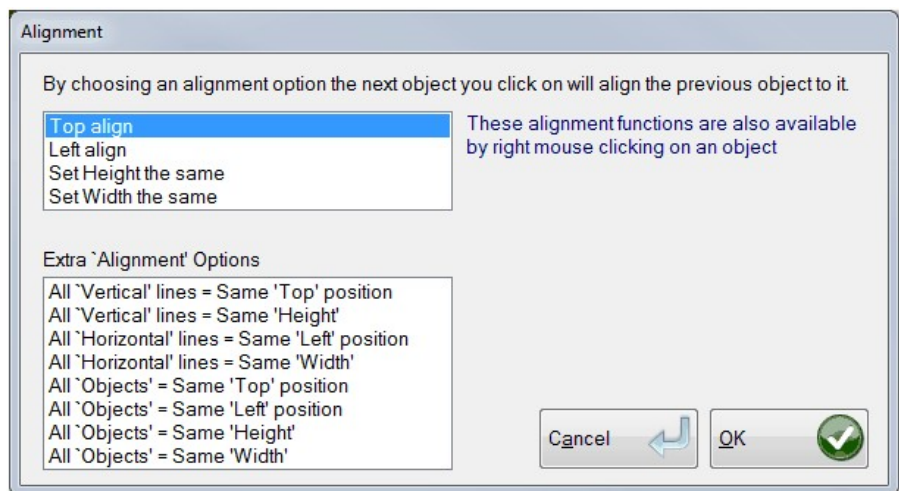
Location

Use the Location window (shown right) to fine tune the size and position of the selected object.



Alignment

Use the Alignment option to make a number of positional adjustments quickly. You should save your report before doing any large adjustments, as an Alignment action cannot be undone!



The first four options on this window are also available by Right Clicking on an object on the design area of the Custom Directory Designer. To run any of the Extra Alignment Options, simply select one of the options, press OK and then click on an object.

Grouped Data Objects

A grouped data object is an object that takes a number of fields, or multiple information and handles it in one simple object. This helps to remove the need for sub reports, and makes creating simple reports much faster.



Shown below is the Group Data Objects options. Click on each one for more information.

Available Grouped Data Objects

- Adult Names Combined
- Children Names
- Address
- Family Details
- Personal Details

Adult Names Combined

The Adult Names Combined object puts together the primary and the secondary adults name in one field. This helps to keep the two names compact and neat. If only one name exists in the 2 adult name positions in the family file, then only that name will be printed.

For Example:

Stephen and Marion

Note: If a person has a preferred given name, then these will be used in place of the names recorded in the Primary and Secondary adults name fields.

For Example:

Stevo & Maz

Children's Names

A Standard Field property window is shown below. The options here are identical for the following Objects:

Surname, Adult Names Combined, Primary Adult Given Name, Secondary Adult Given Name and **Children's Names**. Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

Children's Names

When used with Childrens Names, the following options are also available. The Children's names combined object makes including all the children on one report easy. This object can display the names Vertically, or Horizontally.

Vertical Orientation

John
Peter
Ruth
Jane

Horizontal Orientation

John, Peter, Ruth, Jane

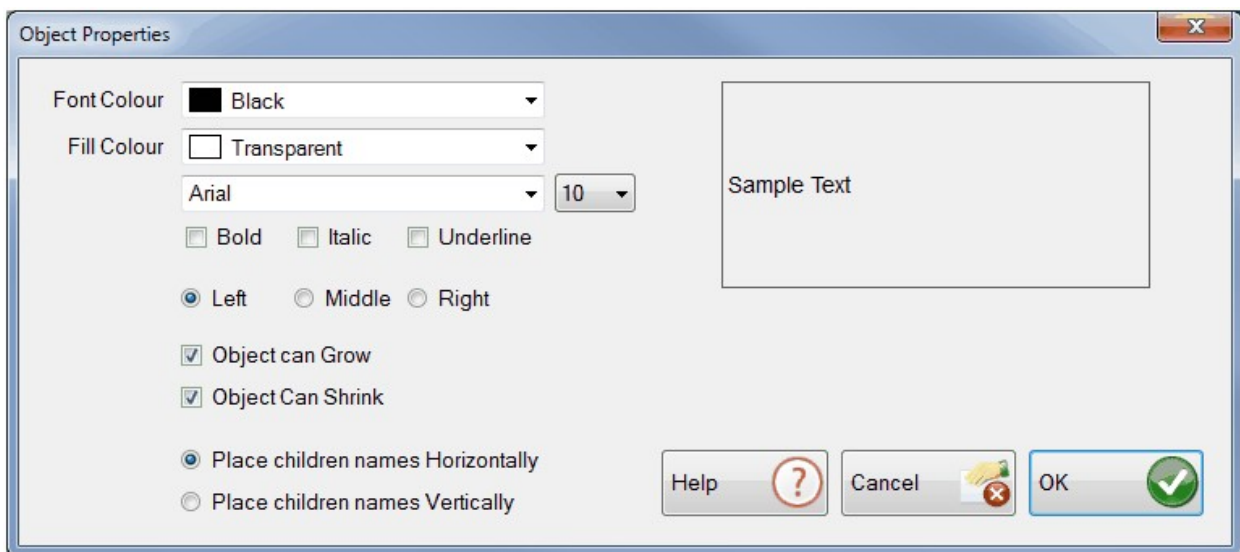
Note, in Horizontal Orientation, the comma's are automatically put in.

Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size itself in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

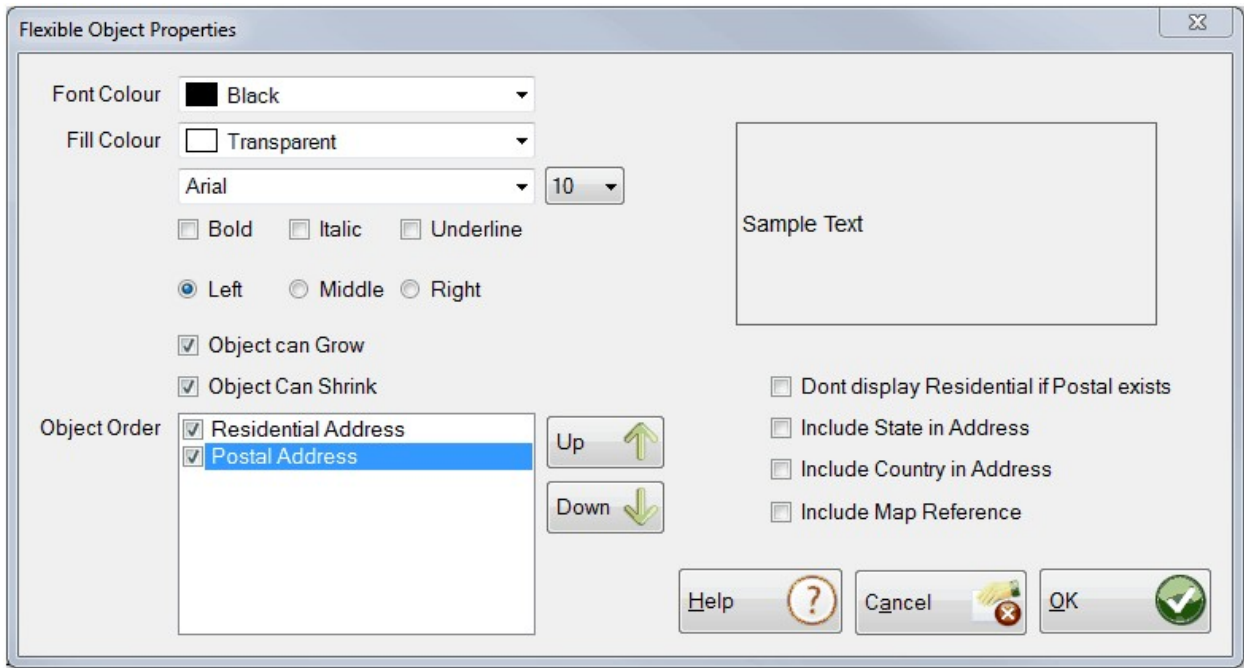
Object Properties

Shown below is the general properties window for many of the field objects in Custom Report.



Address

An Address Field property window is shown below.



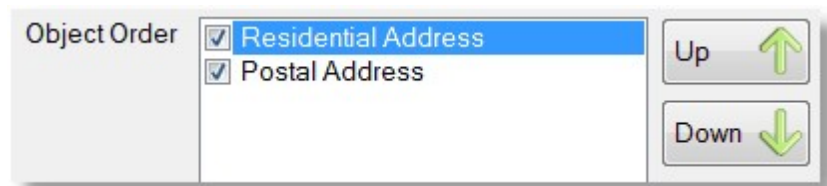
Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size itself in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

Object Order

Choose the order for your address type. If you want to display only one address, tick only the address you want to display.



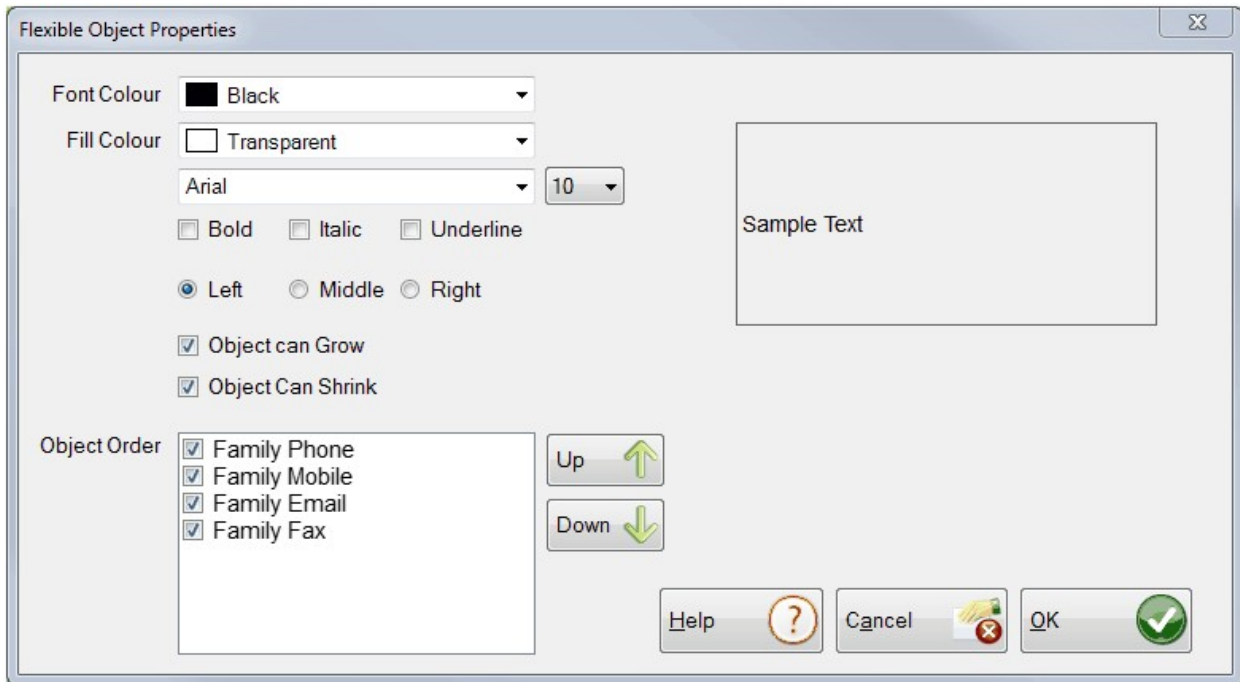
Use the Arrow keys to change the order of display.

Don't Display Residential...

Tick the Don't Display Residential If Post Exists option to force (for this custom design) Pastoral Care to only show the post address if both address fields are filled in for the family file.

Family Details

A Family Field property window is shown below.



Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

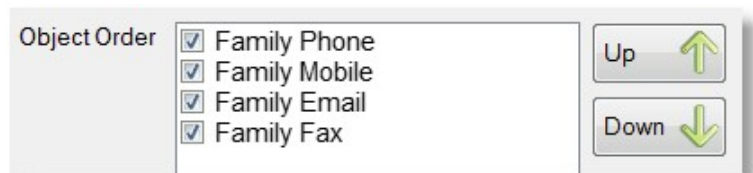
Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size it'self in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

Object Order

Choose the order for your selected fields.
Tick only the fields that you want to include with this object.

Use the Arrow keys to change the order of display.



Personal Details

A Personal Details Object property window is shown below. Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size it'self in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

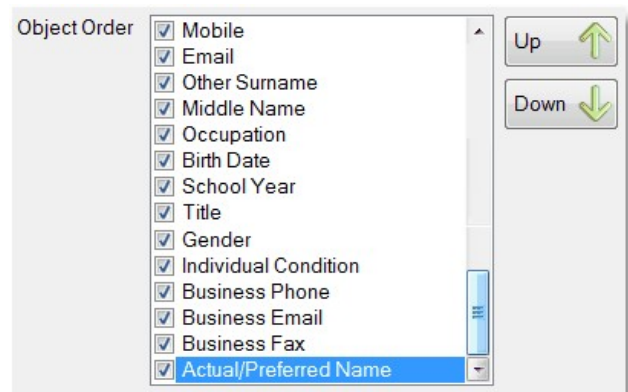
Object Order

Choose the order for your selected fields.

Tick only the fields that you want to include with this object.

Use the Arrow keys to change the order of display.

Shown below is a sample of how this object displays on a Custom Directory. Each Individuals Name is automatically included with the selected data.



Stephen

Mobile Phone:0400297025
 Email:stephen@spirit.com.au
 Occupation:Plumber
 Birth Date:03/07/1945
 Title:Mr.

Marion

Mobile Phone:041234567890
 Occupation:Doctor
 Birth Date:05/07/1946
 Title:Mrs.

Peter

Mobile Phone:041234567890
 Occupation:Retired
 Birth Date:02/06/1965
 Title:Rev.

Finance Area Objects

The Finance Area Objects in Custom Report Designer allow you to design a receipt for use with the [Financial Records](#) feature of Pastoral Care. Once you have added any object from the Finance Area Objects, your custom report becomes a report that can only be used from within the [Financial Records](#) area of Pastoral Care.

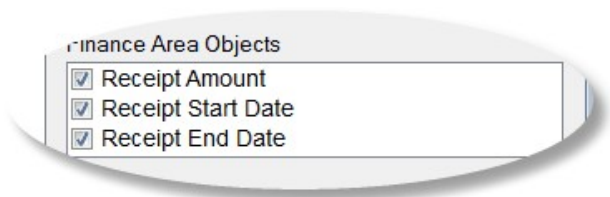
Create a Receipt

To create a Receipt in Custom Report Designer, simply use the objects for this task (shown below) and any other objects (names, address etc) that you want on your receipt, and then save it! Your custom receipt will then become available from the Custom List of reports in the [Financial Records](#) area of Pastoral Care.

Objects

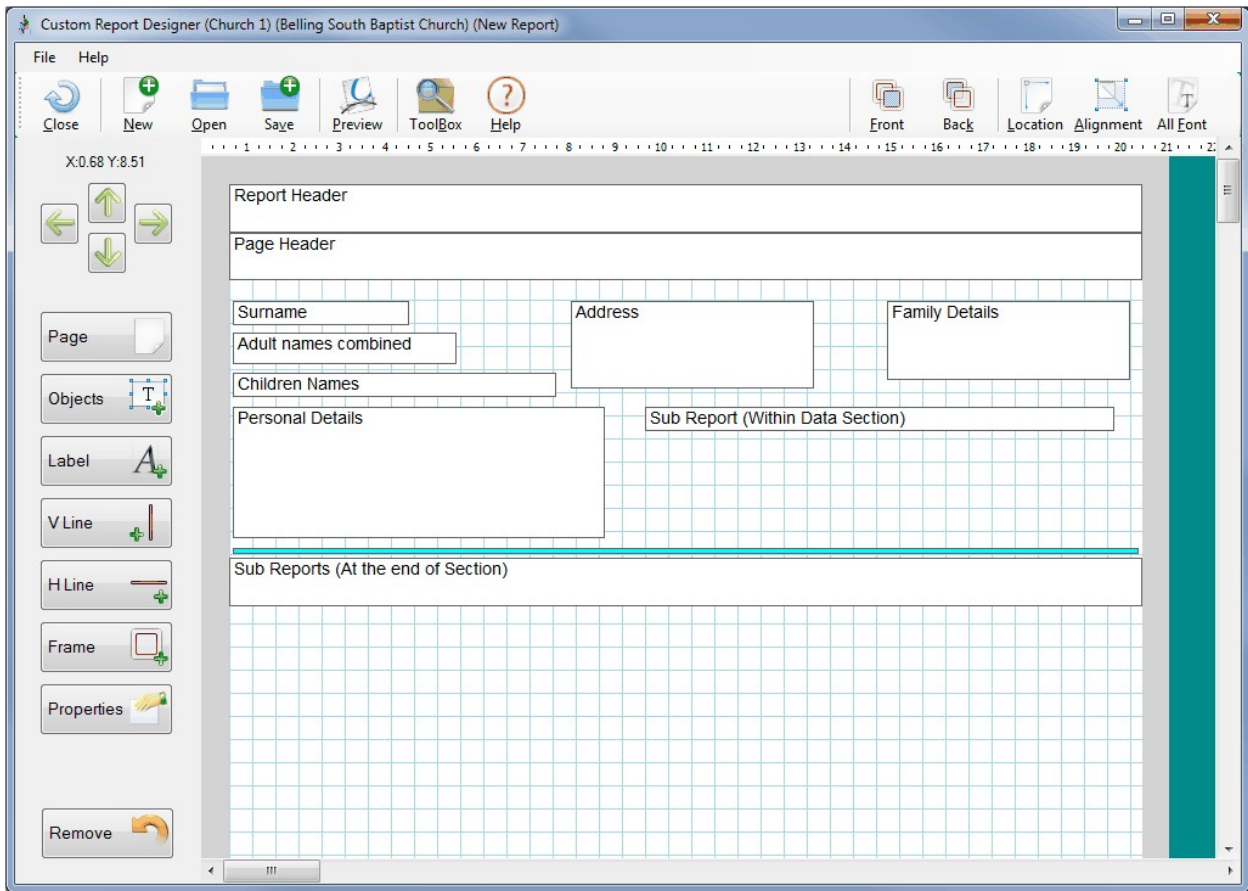
Select each item that you want to include on your receipt. Most people will want all 3 items as this will display the date range of the receipt, as well as the total amount donated within that period.

A receipt can be generated from the [Financial Records](#) area that is a total of giving over a period, saving you from producing a receipt individually for every time a person donates to a project.



The Custom Report Main Window

Shown below is the main Custom Report design window with a range of objects displayed on it. Click on each object and each part of the window to learn more.



The Design Grid

The Design Grid is the area the sits in the middle of Custom Report Designer and Custom Directory Designer. This is where you place objects and data fields on your grid to layout how you want your report to look like when it prints out.

For settings on the design grid, like the size of the ruled lines, and the type of ruled lines etc, see [Page](#) settings by pressing Page on the [Side Bar](#) of the Custom Report Designer Window.

You can use the following techniques to adjust the position and size of objects on this grid.

[Selected Object](#)

[Sizing Objects](#)

[Moving Objects](#)

Report Headers & Page Headers

The Report Headers and Page Header objects help you design a Banner at the top of the report on page 1 (Report Header) and also a banner on the top of every page. (Page Header)

See [Page Objects](#) for information on Headers and Footers.

Sub Reports

Sub Reports are available for adding more information to your report when the main objects do not cover enough information. There are 14 additional areas of interest built into the Sub Report Objects.

See [Introduction to Sub Reports](#), [Sub Report Within Data Section](#) and [Sub Report at end of Data Section](#) for more information on Sub Reports and how to create them.

Toolbar

Shown below are each of the Toolbar buttons for the Custom Directory Designer.



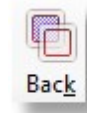
Press New to start creating a new Custom Report from scratch.



Bring the selected object in front of all other objects.



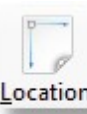
Press Open to select an already created Custom Report to open for modification.



Send the selected object behind all other objects.



Press Save to save your Custom Directory. Saving makes your changes permanent, and makes your template available in all reporting areas of Pastoral Care.



Use [Location](#) to fine tune the size and position of the selected object.



Use [Preview](#) to take your Custom Report for a test drive!



Use the [Alignment](#) button to align the selected object to another object as well as bulk moving a range of objects.



Open the standard Pastoral Care [Toolbox](#)



Use [All Font](#) to set the font on all objects to be the same font.

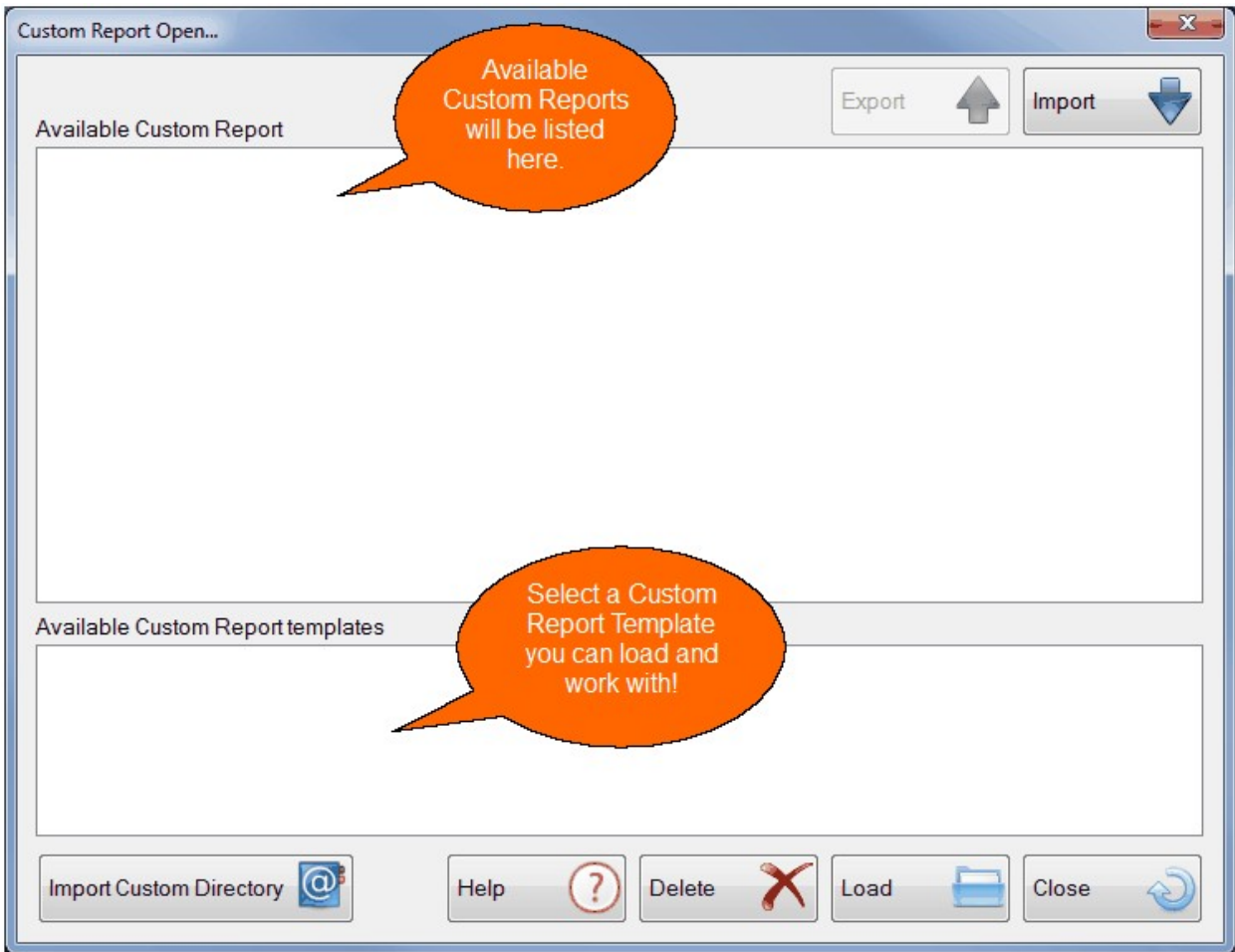
Open



Press the Open Icon on the toolbar to select an already designed Custom Report for editing.



Click on each part of this window below to learn more.



Available Custom Reports

This is where your saved Custom Reports are listed. You can select a report here and press the [Load](#) button to open that report for editing. You can also select a report here and press [Export](#) to create zip file for sharing your report with another church.

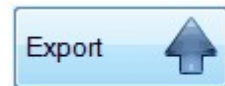
Available Custom Templates

This is where your Custom Template are listed that you can pen and use in the Custom Report Designer.

A template is a report we have created, and gives you a head start on creating your own reports FROM our templates.

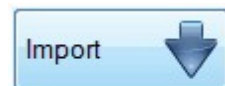
Export

Use the Export Button to create a file that another church can IMPORT for use in their Custom Report area.



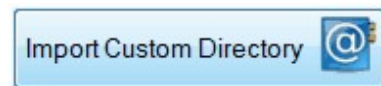
Import

Use the Import Button to import a Custom Directory designed by someone else.



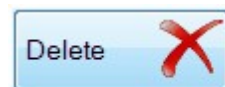
Import Custom Directory

Press the Import Custom Directory button to import a selected custom directory, and convert it to a custom report for more advanced editing.



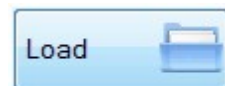
Delete

Delete the selected Custom Report.



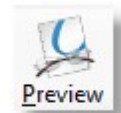
Load

Load the selected Custom Report.



Preview

The Preview feature allows you to select a family, or a range of families / individuals for testing out your new Custom Report. This is not the area to run your report from, rather it is just a preview / test drive.



Click on each part of the Preview Window below to learn more about this feature.

Preview
✕

Active Families ▾

<input type="checkbox"/> Allwright S & M	<input type="checkbox"/> Hanks J & M	<input type="checkbox"/> White F & H
<input type="checkbox"/> Angel P & B	<input type="checkbox"/> Harris D & A	
<input type="checkbox"/> Anglin B & K	<input type="checkbox"/> Heath J & A	
<input type="checkbox"/> Baker J & R	<input type="checkbox"/> Iles B & W	
<input type="checkbox"/> Barton B & M	<input type="checkbox"/> Jones C & W	
<input type="checkbox"/> Blackeby D	<input type="checkbox"/> Jury P & H	
<input type="checkbox"/> Blackeby & H	<input type="checkbox"/> Kean S & J	
<input type="checkbox"/> Brown P & H	<input type="checkbox"/> Klond P & J	
<input type="checkbox"/> Chapman A & R	<input type="checkbox"/> Knight M & S	
<input type="checkbox"/> Collins F & J	<input type="checkbox"/> Leah A & M	
<input type="checkbox"/> Dimsey R & L	<input type="checkbox"/> Lynch A & K	
<input type="checkbox"/> Dobber H & R	<input type="checkbox"/> McCoy D & B	
<input type="checkbox"/> Eadon J & E	<input type="checkbox"/> Morton P & J	
<input type="checkbox"/> Edwards D & H	<input type="checkbox"/> Nixon G & E	
<input type="checkbox"/> Flemming J & J	<input type="checkbox"/> Oliver B & F	
<input type="checkbox"/> French H & R	<input type="checkbox"/> Potter M & W	
<input type="checkbox"/> Gordan F & L	<input type="checkbox"/> Read M & A	
<input type="checkbox"/> Graham R & B	<input type="checkbox"/> Smith G & C	
<input type="checkbox"/> Gray P	<input type="checkbox"/> Taylor G & R	

Report Mode

Family Individual

Add titles to 'Given Names'

Allow page break in family details

Preview run amount

20 Families

Sample 'Title' text

Preview Family

Preview Tag

Preview Run

Help

Close

Family Filter

Select a Family Filter for running your preview on. For most people, Active Families as the default is perfect for this job!

Active Families

Select Families

If you want to run on a single family, or a few manually selected families, tag (tick) those families that you want to run the current Custom Report on.

<input type="checkbox"/> Allwright S & M	<input type="checkbox"/> Hanks J & M
<input type="checkbox"/> Angel P & B	<input type="checkbox"/> Harris D & A
<input type="checkbox"/> Anglin B & K	<input type="checkbox"/> Heath J & A
<input type="checkbox"/> Baker J & R	<input type="checkbox"/> Iles B & W
<input type="checkbox"/> Barton B & M	<input type="checkbox"/> Jones C & W
<input type="checkbox"/> Blackeby D	<input type="checkbox"/> Jury P & H
<input type="checkbox"/> Blackeby & H	<input type="checkbox"/> Kean S & J
<input type="checkbox"/> Brown P & H	<input type="checkbox"/> Klond P & J
<input type="checkbox"/> Chapman A & R	<input type="checkbox"/> Knight M & S
<input type="checkbox"/> Collins F & J	<input type="checkbox"/> Leah A & M

Report Mode

Choose to run your report preview in Family Mode, or Individual Mode.

Report Mode

Family Individual

Add Titles

Where they exist in your data, add a Title to each adult's given name on the report.

Add titles to 'Given Names'

Allow Page Break

Allow a page break within any family details being displayed on the report preview.

Allow page break in family details

Preview Run Amount

If you are going to do a Preview Run, that is a number of families, enter how many families you want to output to your report preview.

Preview run amount

20 Families

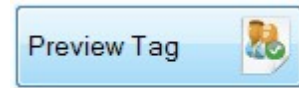
Preview Family

Pressing this button will only run the selected report template on the currently highlighted (no Tagged) family.



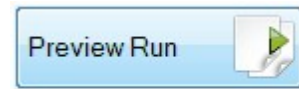
Preview Tag

Pressing this button will only run the selected report template on the currently tagged (not highlighted) families.



Preview Run

Press this button to let Pastoral Care preview the report template for the first x number of families it finds in your database.



Front

Bring the currently selected object to the front of the page, this makes this object cover any objects that might be overlapping.



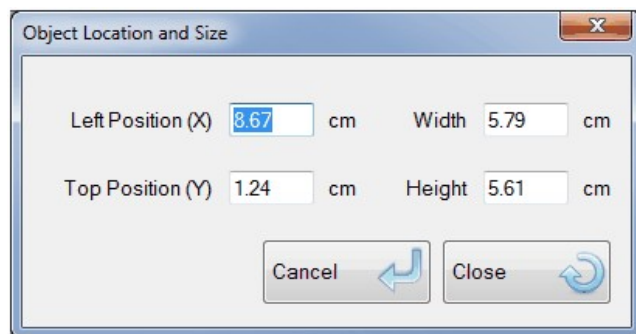
Back

Send the currently selected object to the back of the page, this makes this object sit behind or be covered by any overlapping objects.



Location

Use the Location window (shown below) to fine tune the size and position of the selected object.

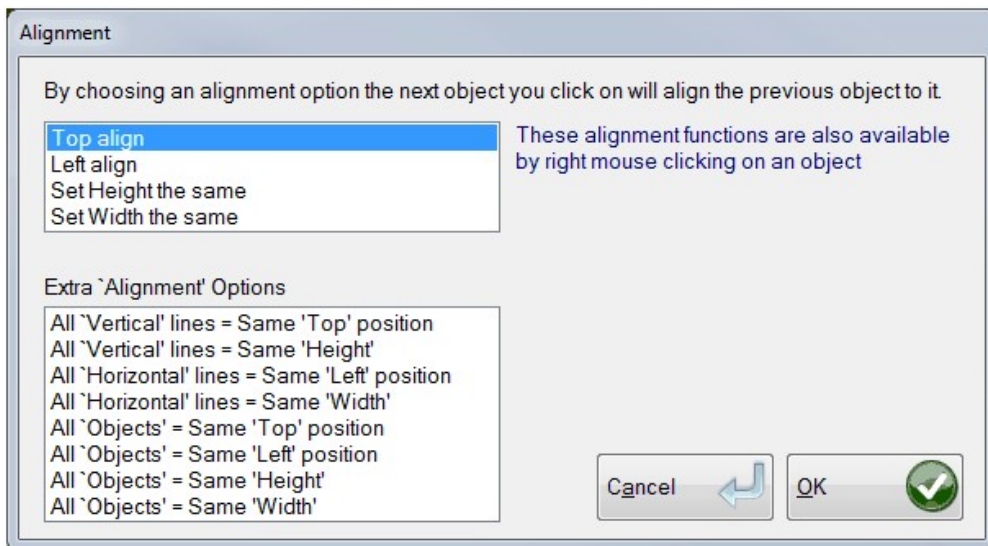


Alignment

Use the Alignment option to make a number of positional adjustments quickly. You should save your report before doing any large adjustments, as an Alignment action cannot be undone!

The first four options on this window are also available by Right Clicking on an object on the design area of the Custom Directory Designer.

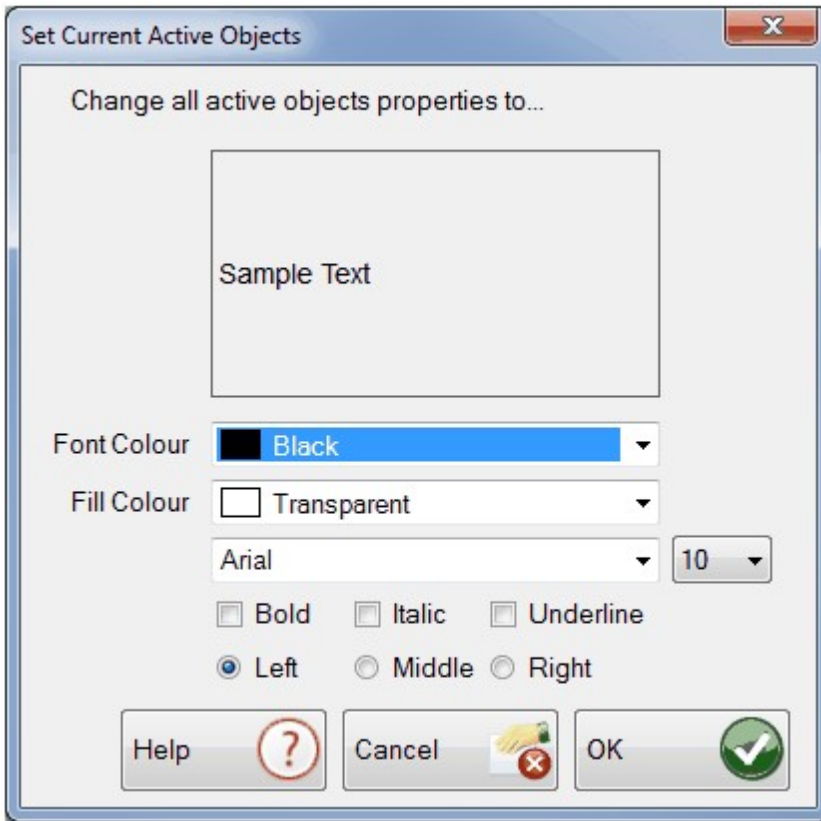
To run any of the Extra Alignment Options, simply select one of the options, press OK and then click on an object.



All Font

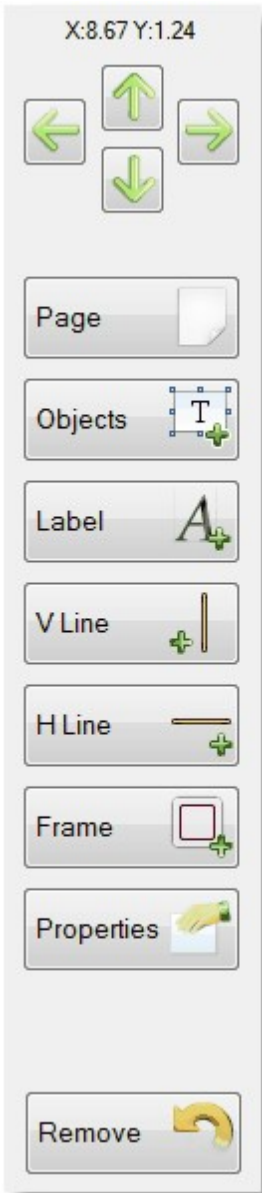
Use the All Font option to set the font properties on all objects currently on the report to be the same.





Side Bar

The following buttons make up the left side of the Custom Directory Design Window. Click on each item for more information.



Nudge

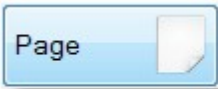
Use the 4 nudge buttons to push the currently selected object in the direction of the arrow you are pressing.

When an object is selected, your arrow keys on the keyboard of your computer also do the same function as the nudge buttons here.



Above the arrows is the position of the Top Left corner of the selected object displayed in CM.

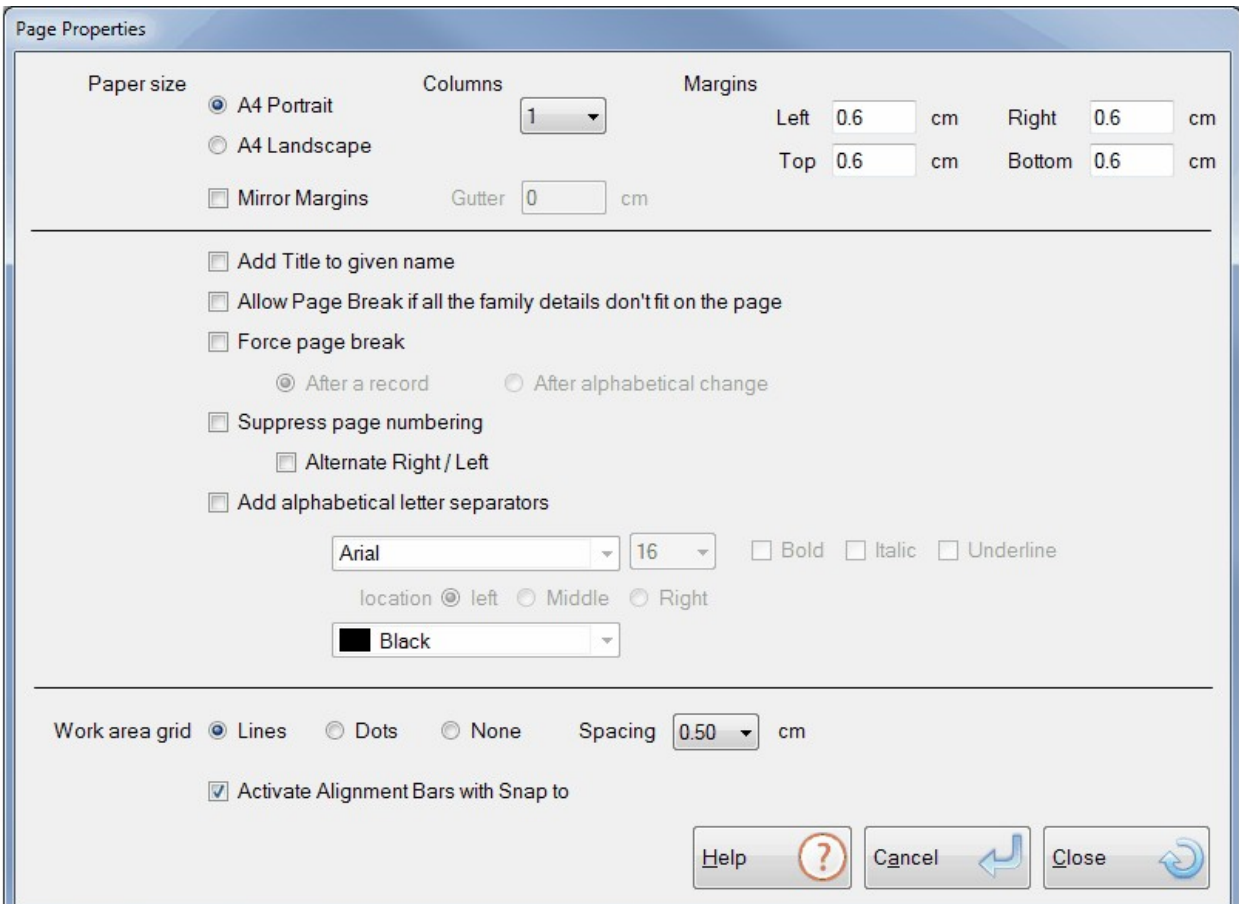
Page



Pressing the Page button opens up the following Page Settings window. All Page Settings affect the currently loaded or new template that you are working on.



Click on each part of this window for more information.



Paper Size

There are only 2 paper sizes supported for Custom Directory / Custom Reports. A4 Portrait, and A4 Landscape. If you want to produce an A5 Booklet formatted church directory, use A4 Portrait size, and when printing, our [Report Viewer](#) has the capacity to automatically produce the A5 directory from an A4 template.

Paper size

A4 Portrait

A4 Landscape

Columns

Setting Columns is simple, Just select the number of Columns, and Pastoral Care will do the rest! You will find that the work area in the Custom Designer tools will shrink to the size of the column.

Columns

3

Mirror Margins

Use Mirror Margins to automatically produce alternate page margins for double sided printing. If you are using some kind of binding that needs more space, you can increase the inside "margin" known as the gutter. The gutter space is that extra space allowance used to accommodate the binding in books and magazines. The amount of gutter needed varies depending on the binding method.

Mirror Margins

Gutter 2 cm

Margins

Setup your page margins as needed. After setting page margins, the work area displayed when you return to your report design shows you the Printable Area. You cannot place objects outside of the printable area.

Margins

Left	0.6	cm	Right	0.6	cm
Top	0.6	cm	Bottom	0.6	cm

Titles

Tick this option to force Pastoral Care to always display / print a person's Title with their Given Name on the Custom Report / Directory that you are designing.

Add Title to given name

Page Break Within Family

Tick this option to allow Pastoral Care to insert a page break inside a families data area, effectively splitting that family over multiple pages.

Allow Page Break if all the family details don't fit on the page

Force Page Break

After A Record

Select this option to force a page break after each Family (when in family mode) or after each individual when in Individual Mode

Force page break

After a record After alphabetical change

After Alphabetical Change

Select this option to force a new page at the start of each new Alphabetical Position based on the first letter of the surname object

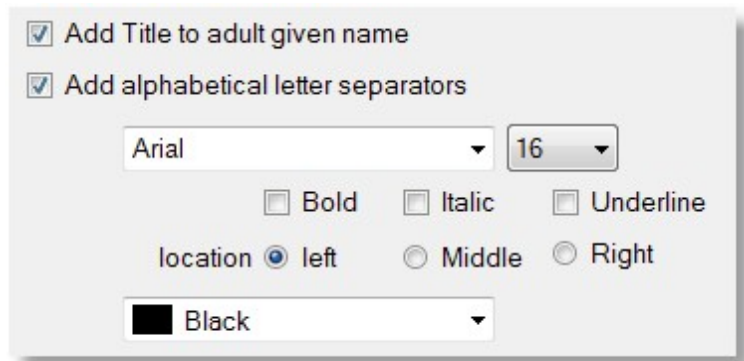
Suppress Page Numbers

Tick this option to turn off Page Numbers.

Suppress page numbering

Alphabetical Separators

Tick the Alphabetical Separators option to insert A,B,C etc for visually separating each Alphabetical Position based on surname. (See Sample Below). You can use the font options on this area for setting the font, position and colour of the Alphabetical Separators.



Sample Alphabetical Separator



Work Area Grid

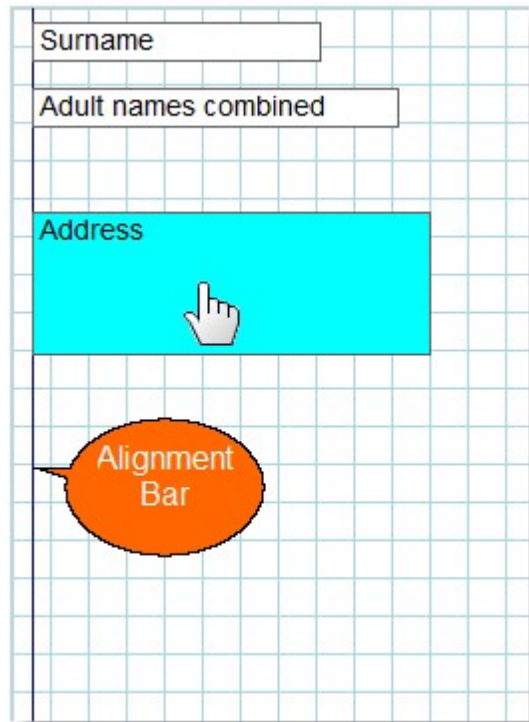
Work area grid Lines Dots None Spacing cm

Activate Alignment Bars with Snap to

Select the style of Work Area Grid to assist you in lining up objects as you place them and move them on the work area.

Alignment Bars

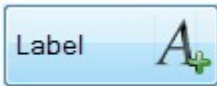
When you are dragging an object (Hold a left click on an object and move the object with the mouse) when either a top edge or a left edge of the moving object comes into line with another object, an alignment bar (line) will draw on the screen to indicate that you have either Horizontal or as in our sample below, vertical alignment. Letting go of the mouse will then allow your object to snap to that position and stay there unless moved later by design.



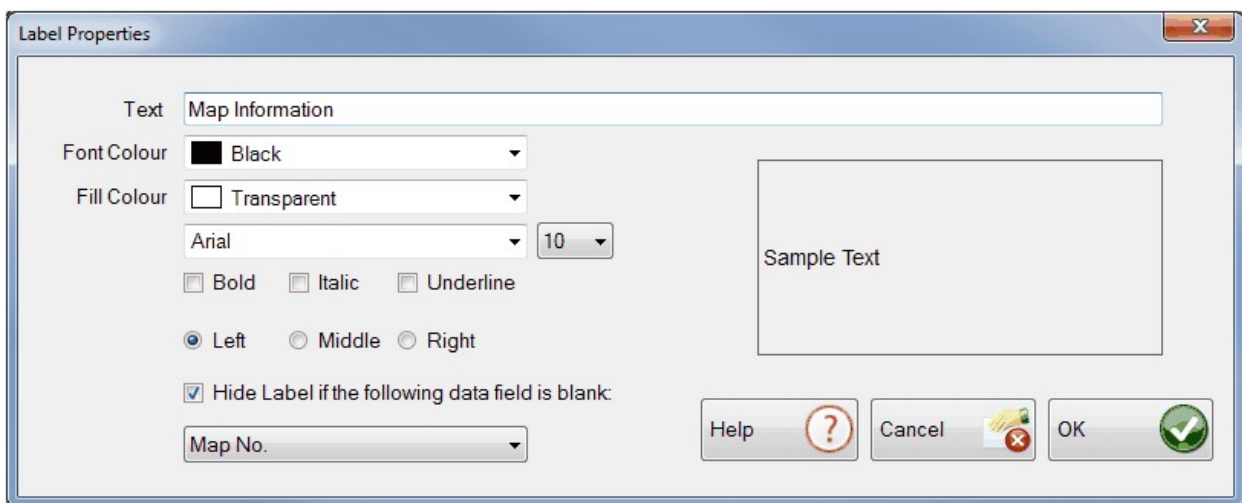
Objects

The Objects window allows you to select the data objects that you want to include on your Directory. This is covered in the topic [Object Picker Window](#).

Label



A Label is an object that allows you to simply type in some text and display it on the Directory/Report. Selecting Properties on a label opens up the following properties window.



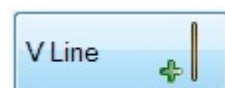
You can Edit the Text for the label here, also set any standard Font property (Type, Colours, Alignment etc)

Hide Label Option

If you tick this option (as in our example above) you are linking the display of the Label Text to the existence of information in a field. In our example, if there is no Map Reference for a family, then the Label "Map Information" would not be shown for that family.

V Line

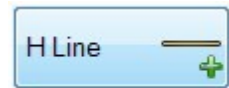
The Vertical Line Object places a Vertical line on the design window. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line. Vertical lines are repeated down the page for each record.



Double clicking on a line will open the [Line Properties](#) window.

H Line

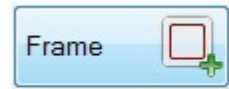
The Horizontal Line Object places a Horizontal line on the design window. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line. Horizontal Lines are repeated for each record.



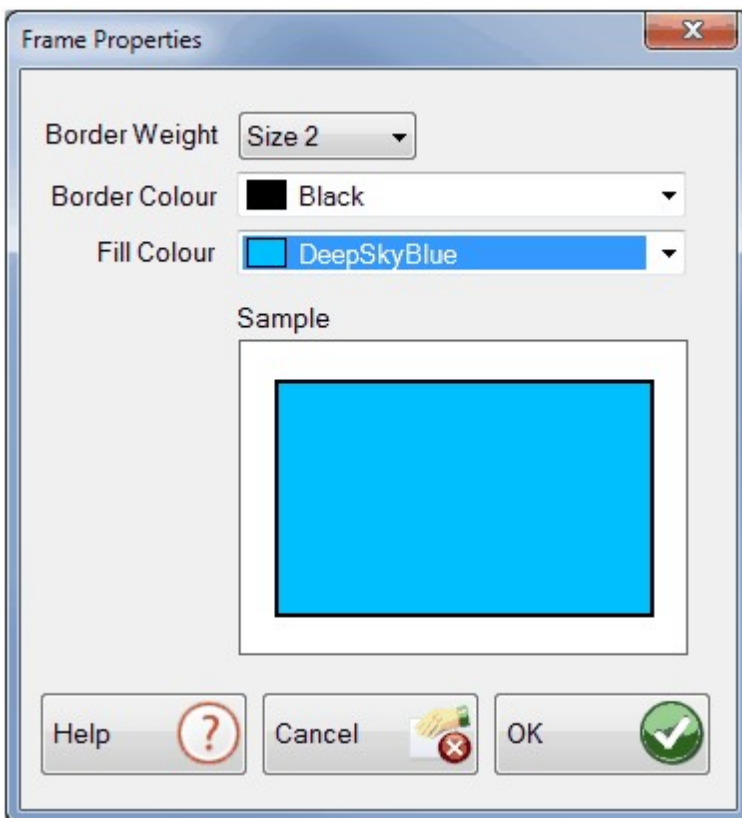
Double clicking on a line will open the [Line Properties](#) window.

Frame

The Frame Object is simply a Rectangle that you can use to provide highlighting or boxing of a section. This object cannot auto grow, so you need to consider how information will display alongside or on top of this object.



You can set Border Size and Colour, and Fill Colour for the Frame Object.



Properties

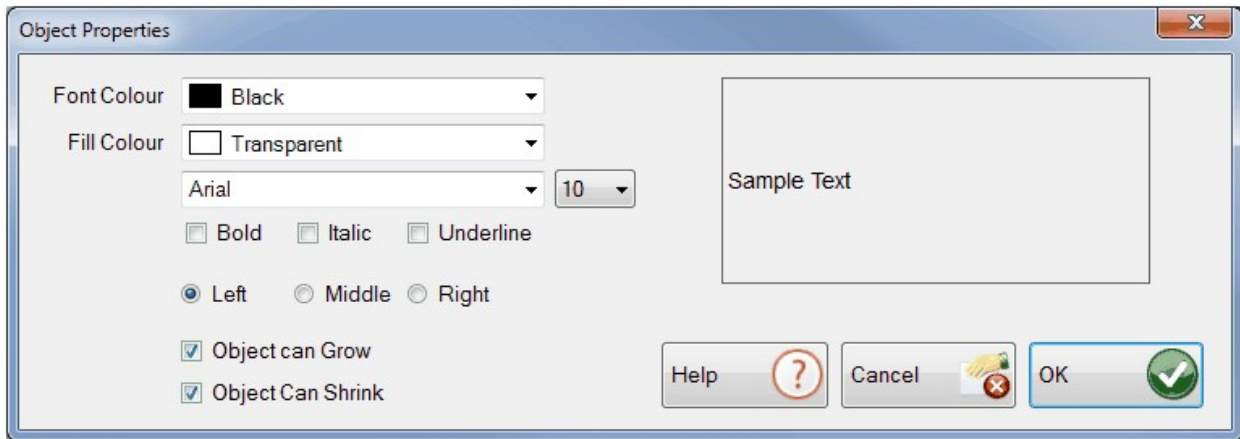
This section shows all Property windows for Custom Directory and Custom Report objects. To open a properties option window for any object, select that object and press the Properties Button, or double click on the object that you want to see the properties window for.



Standard Object Properties

A Standard Field property window is shown below. The options here are identical for the following Objects:

Surname, Adult Names Combined, Primary Adult Given Name, Secondary Adult Given Name, Children's Names



Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size it'self in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

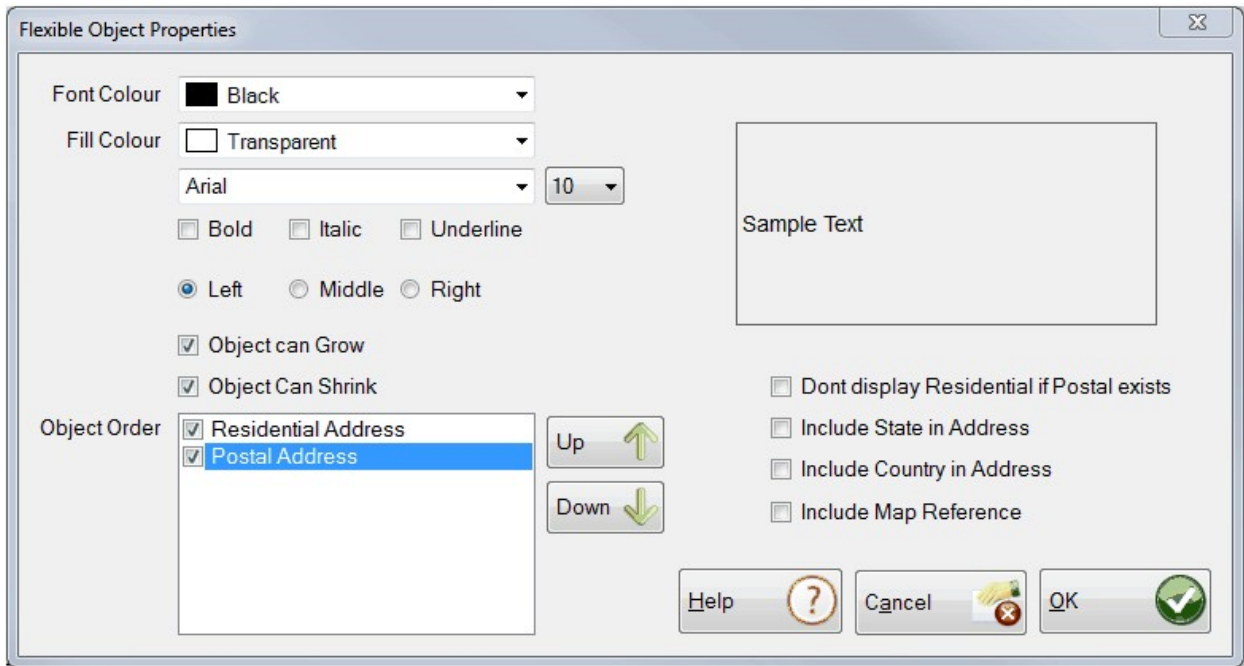
Children's Names

When this property window is displayed for Children's Names, the following options are included in this section to set the names to be listed Vertically, or Horizontally.

- Place children names `Horizontally`
- Place children names `Vertically`

Address Object Properties

An Address Field property window is shown below.



Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

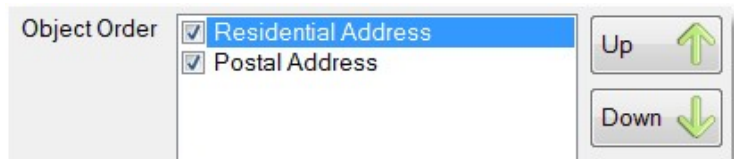
Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size itself in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

Object Order

Choose the order for your address type. If you want to display only one address, tick only the address you want to display.

Use the Arrow keys to change the order of display.

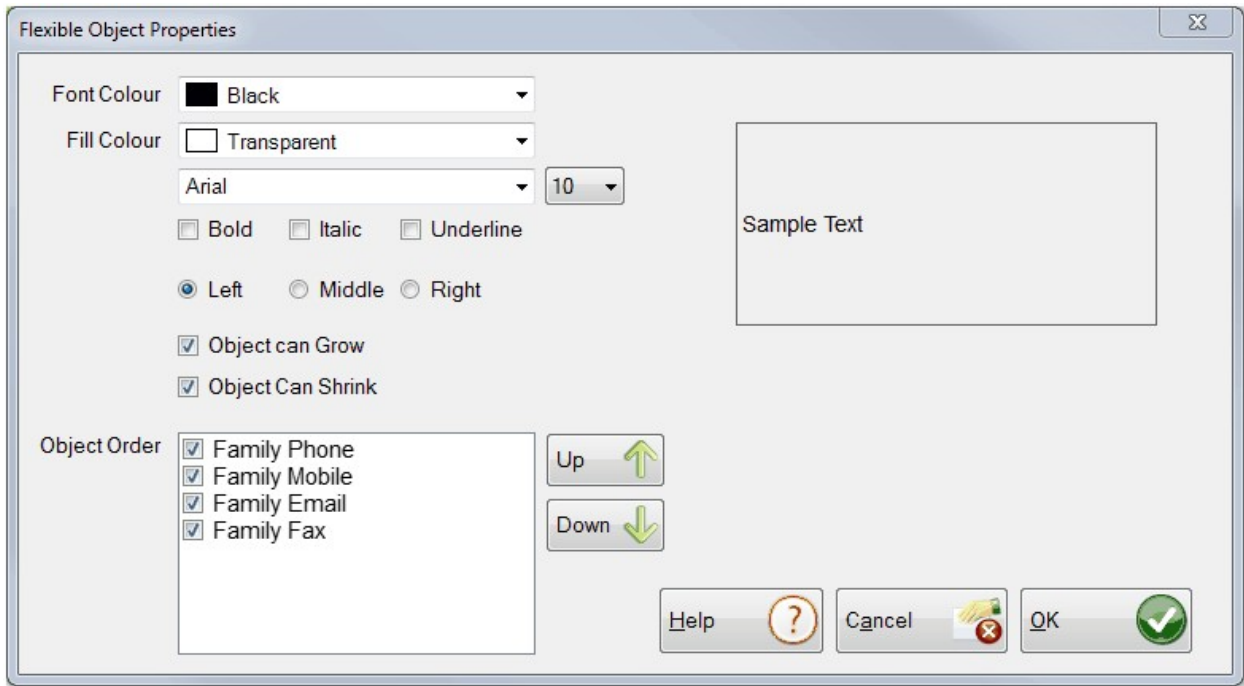


Don't Display Residential...

Tick the Don't Display Residential If Post Exists option to force (for this custom design) Pastoral Care to only show the post address if both address fields are filled in for the family file.

Family Object Properties

A Family Field property window is shown below.



Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

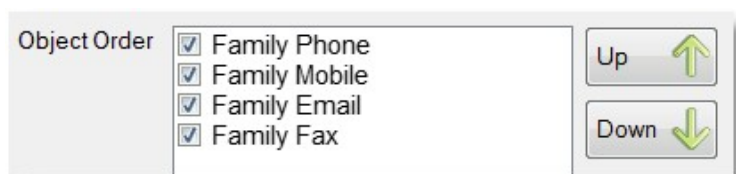
Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size itself in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

Object Order

Choose the order for your selected fields.
Tick only the fields that you want to include with this object.

Use the Arrow keys to change the order of display.



Personal Details Object Properties

A Personal Details Object property window is shown below.

Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size it'self in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

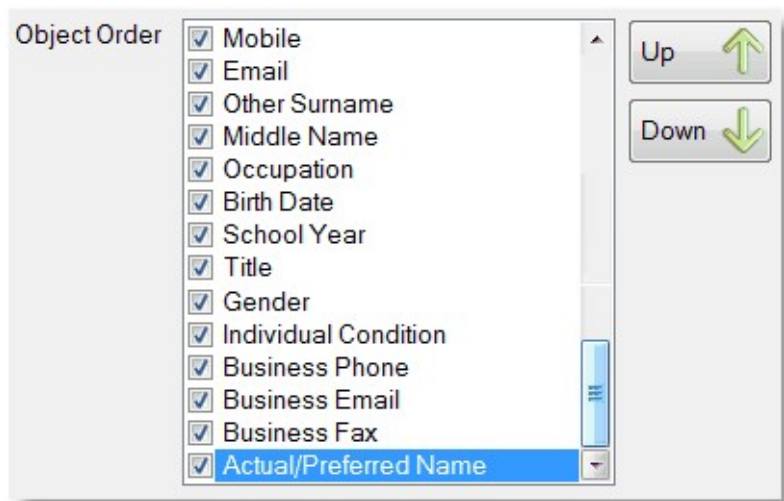
Object Order

Choose the order for your selected fields.

Tick only the fields that you want to include with this object.

Use the Arrow keys to change the order of display.

Shown below is a sample of how this object displays on a Custom Directory. Each Individuals Name is automatically included with the selected data.



Stephen

Mobile Phone:0400297025
 Email:stephen@spirit.com.au
 Occupation:Plumber
 Birth Date:03/07/1945
 Title:Mr.

Marion

Mobile Phone:041234567890
 Occupation:Doctor
 Birth Date:05/07/1946
 Title:Mrs.

Peter

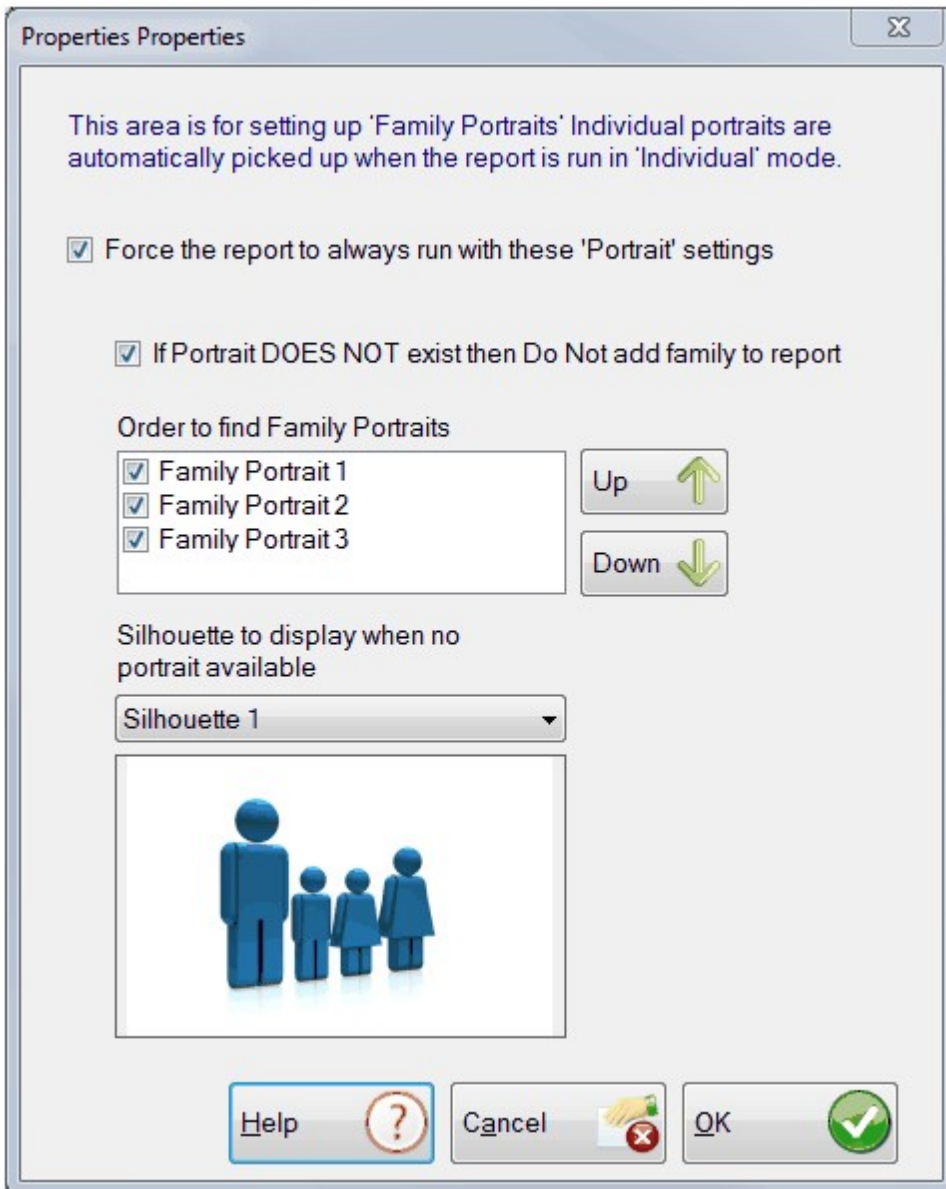
Mobile Phone:041234567890
 Occupation:Retired
 Birth Date:02/06/1965
 Title:Rev.

Portrait Object Properties

The Portrait Object properties window (shown below) allows you to either let Pastoral Care manage the portrait selection automatically (Recommended) or to allow you to force the control of the portrait by ticking the option "Force the report to always run with these Portrait settings".



Click on each part of this window below to learn more about Portrait control.



Tick this option to use settings on this window to override Pastoral Care default portrait controls, only however for the current template you are working on.



Force the report to always run with these 'Portrait' settings

Tick this option to suppress a family or individual from your Custom Directory / Report if there are no portrait's for use.

If Portrait DOES NOT exist then Do Not add family to report

Manually adjust the Portrait Search Order for the current Directory or Report design. Having a Tick on a portrait item identifies to Pastoral Care that you want to use that Portrait in the output.

Order to find Family Portraits

<input checked="" type="checkbox"/> Family Portrait 1	Up 
<input checked="" type="checkbox"/> Family Portrait 2	
<input checked="" type="checkbox"/> Family Portrait 3	
Down 	

In the example above, when composing this object, Pastoral Care will first look for a portrait for the current family in Portrait Save Position 1, if one exists, it will use it, if not it will continue looking in Save Position 2, then 3 until it finds a portrait.

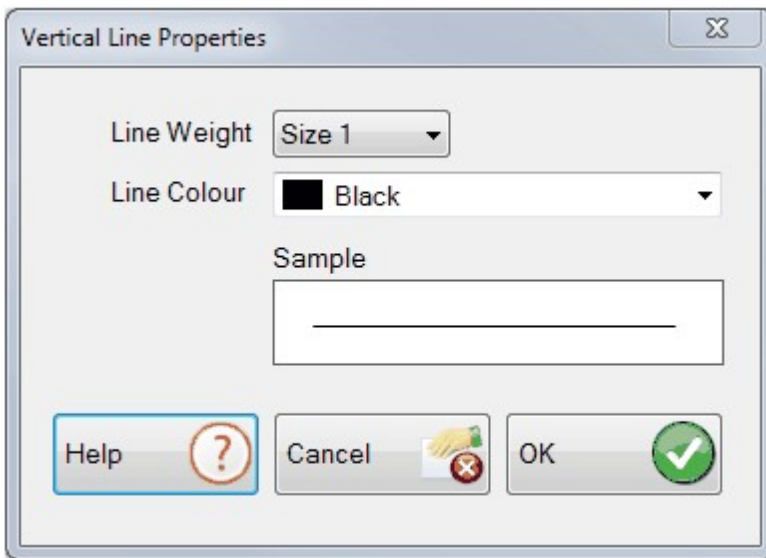
If no portrait exists, you can choose to use a Silhouette to fill in the gap in the report to indicate that a portrait should be there, but it is missing.

Silhouette to display when no portrait available

Silhouette 1 



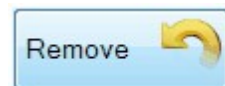
Line Properties



You can select different Line Weights and Line Colours from the Line Properties window.

Remove

Remove the selected object from the design grid. You can also press [Objects](#), and un-tick the object that you want to remove.



Design Tips

In this section we have included a few design tips for helping you with Custom Directory Designer. Click on each area of interest below.

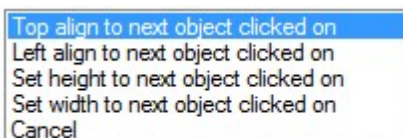
[Not Enough Options?](#) [Right Click](#)

[Saving White Space](#) [Selected Object](#)

[Sizing Objects](#) [Moving Objects](#)

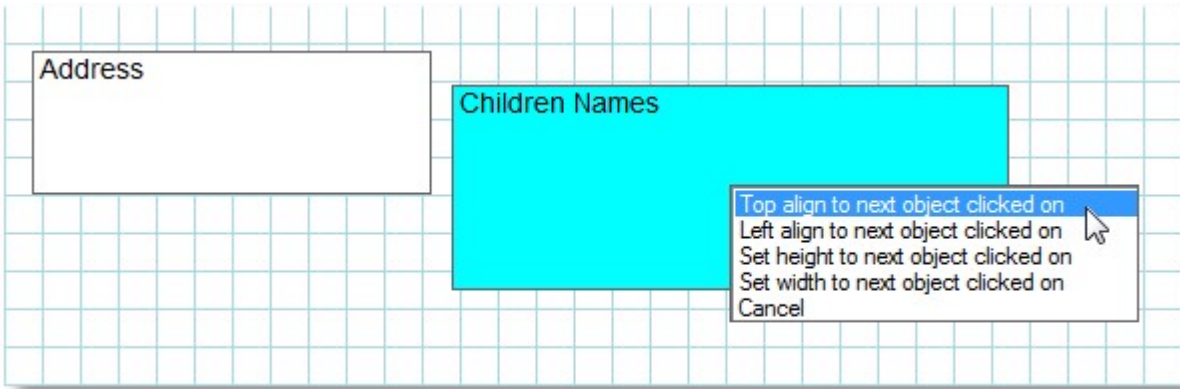
Right Click

If you Right Click while your mouse pointer is over an object, the following pop up menu opens up.

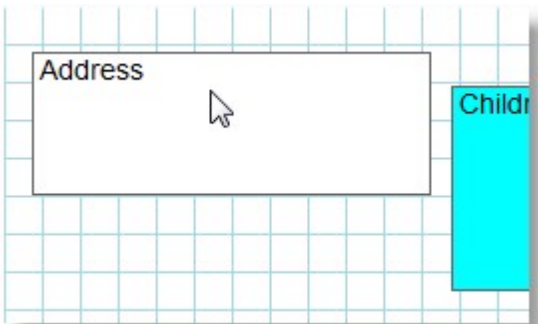


Each action described here will occur to the object that you right clicked on, in relation to the NEXT object you click. For example, if you now selected the first menu item of "Top Align to next object clicked on" and then you clicked on the address box, your Selected Object would move vertically only until the top of the selected box was in line with the top of the Address Box.

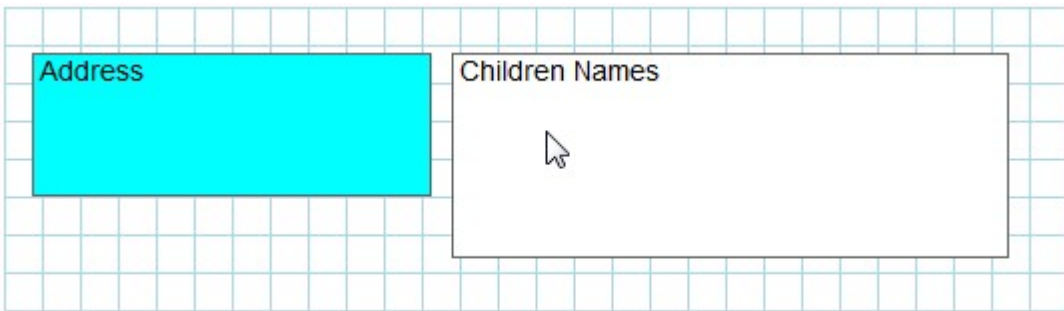
Here is a few visuals to show this. The picture below shows that you have Right Clicked on Children's Names, and you are about to left click on "Top align to next object clicked on"



After selecting that, move the cursor to the Address Object and left click it...



After the left click, the Children's Names object has moved!

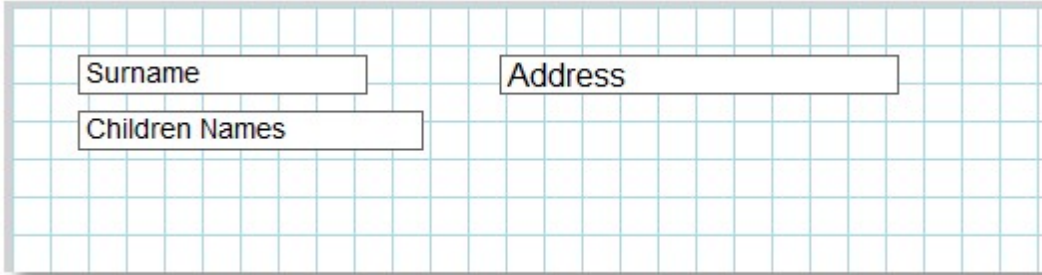


(Notice that Address is now Blue, this is because it is the last object selected, and is therefore the active object)

Saving White Space

The objects in Custom Directory and Custom Report all have Auto Grow and Auto Shrink enabled. This allows for an object to adjust its HEIGHT according to how much information needs to fit in that object. There is a case where one object alongside another object will influence each other and get in the way of shrinking properly, creating the effect of wasting space.

Consider this template:



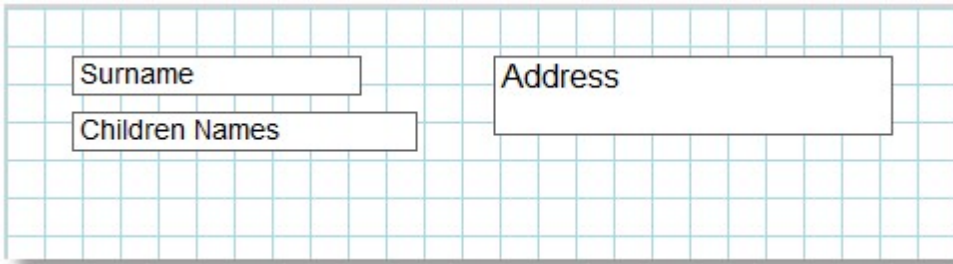
This should produce a report that looks like this:

Smith	25 St Helena Drive
	Unit 4
James	Juanga 4444
Helena	NT
Peter	
John	

HOWEVER, because the Address Field and the Surname field are the same HEIGHT and are top aligned, even though Auto Grow and Shrink are turned on all 3 objects, the actual report looks like the following. Note the wasted space between the Surname and Childrens Name.

Smith	25 St Helena Drive
	Unit 4
	Juanga 4444
	NT
James	
Helena	
Peter	
John	

NOW, make one small change to the design of the template, we are going to make the Address box a bit taller, still top aligned with the Surname:



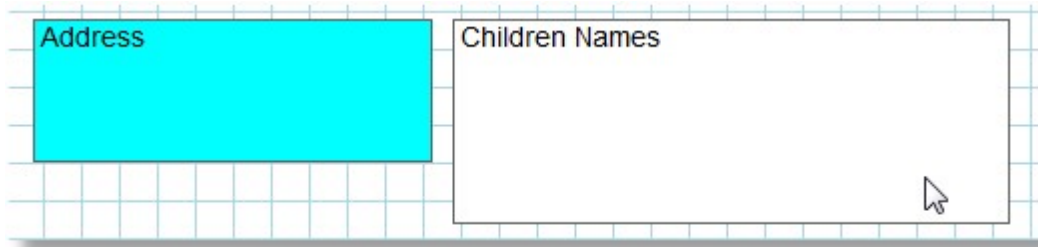
Now the address box overlaps into the Children's Names object, the custom report that is created behaves much better, and produces a report like the following:

Smith	25 St Helena Drive
	Unit 4
James	Juanga 4444
Helena	NT
Peter	
John	

This method may not work in all circumstances, but should assist in reducing wasted space as much as possible. The only object that we are aware of that will always cause wasted space without the ability to influence this greatly is the Portrait Object.

Selected Object

Any object that is showing itself shaded in a Light Blue colour is the currently selected object. Only one currently selected object can exist at the same time. The Address object below is the active object in this example.



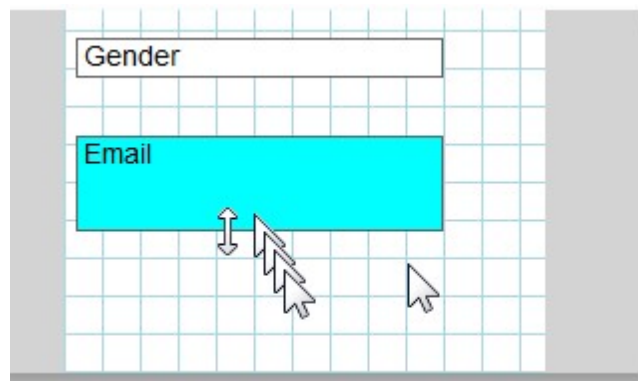
Sizing Objects

When you have placed an object on any Design Grid area in a Custom Directory, Custom Report or Sub Report, you can use the following techniques to size and align your objects.

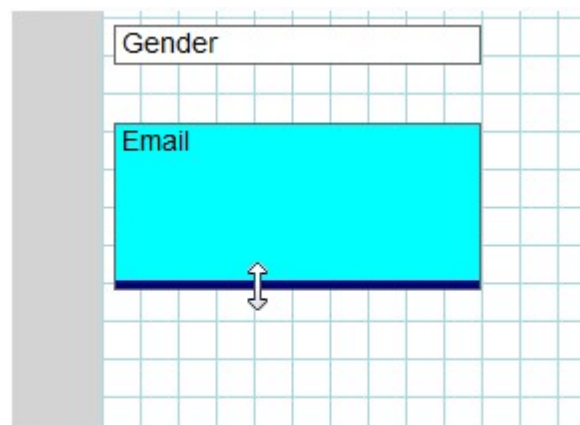
Sizing of an object can be done by using one of 2 methods. Use the mouse to drag an object border, or using the [Right Click](#) menu on an object to change its size relative to another object. See [Right Click](#) for some shortcut sizing and alignment options.

Dragging an object border to change its size

You can only drag one edge (border) of an object at a time. Resizing by use of dragging a corner of an object is currently not supported. To re-size an object, simply move the mouse pointer towards the edge of the object until it changes from your normal mouse pointer, to a double arrow. This is shown below.



After moving the mouse towards the object, the double arrow will appear when you are in the correct position. At the same time, the border or edge that you are about to resize will change to a bold dark blue line, indicating that this edge is ready to move.



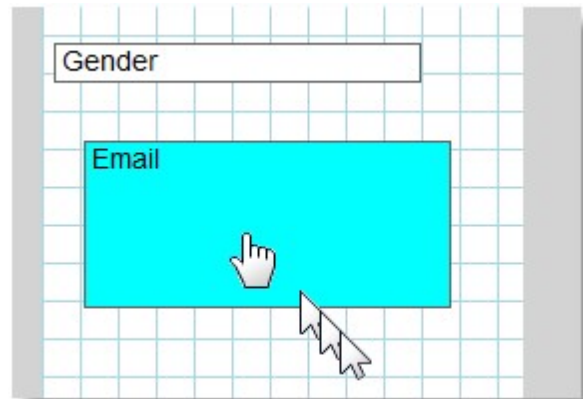
Now the thick blue line has appeared with the double arrow, left click and hold the left mouse button down, and move the mouse in the direction that you want to re-size that edge to.

Moving Objects

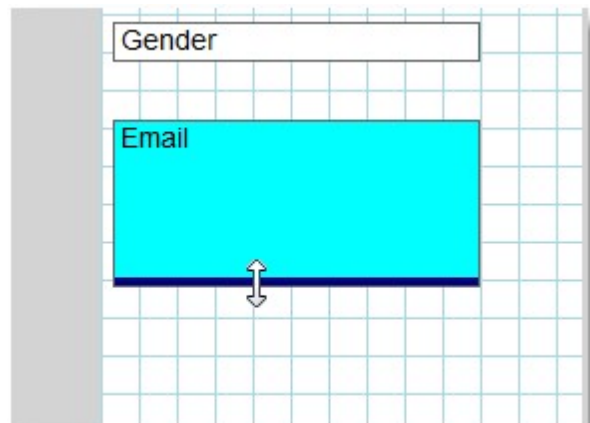
Moving an object can be done by using one of 3 methods. Use the mouse to drag an object, use the [Right Click](#) menu on an object to align it to another object, or use Nudge controls to push an object in small increments. See [Right Click](#) for some shortcut sizing and alignment options.

Moving an object with the mouse

Simply move your mouse pointer over an object and left click and hold the left button down. The mouse pointer will change to a hand showing you that you now have a hold of that object.



After moving the mouse towards the object, the double arrow will appear when you are in the correct position. At the same time, the border or edge that you are about to resize will change to a bold dark blue line, indicating that this edge is ready to move.



Custom Letter Writer

The Custom Letter Writer can be found from the Main Menu of Pastoral Care, by clicking on the Utilities Tab. This feature allows you to create personalised letter templates for use throughout the program. Click on each link below for more information.

For more information see: [Introduction](#) [Using Custom Letter](#) [Custom Letter Main Window](#)

Introduction

The Custom Letter Writer is a built in mail merge template tool. Write either standard letter templates here, or even one off special letters. You can then access these letters from ANY reporting area and print personalised letters to groups of people in your church. You can even combine these letters with a Roll Attendance Analysis, and send a "we missed you last week" letter.

Even though our word processor is not as fancy as other main stream word processors, Custom Letter has one massive advantage. It is totally integrated into ALL reporting smarts. Filters, Sorting, Analysis, Roll, Rosters etc. Any area that can generate a report, can be linked to Custom Letter for personalised AND topical letters that are very accurately targeted to the correct people.

Here are just a few suggestions for what custom letter can be used for...

- Happy Birthday greeting
- We missed you last week letter
- Cover letter to members with the minutes of the AGM etc
- Special Event Invitations

Lets be personal with our letters

Nothing tickles more than a hand written note from someone who is interested enough to pop in a get well card, or a birthday greeting. In our modern day, we have often misplaced or mistaken a genuine communication from someone because it looked automated. Lets face it, a happy birthday letter printed on plain A4 white paper delivered inside a window face envelope might be well intended, but it is too easy to be misread as being impersonal.

Here is a few suggestions for adding that personal touch.

- Hand Sign the letters
- Hand Write the address on the envelope. This really counts in "authentic" indicators
- Use a happy birthday motif birthday paper purchased for that task only.
- Make sure that the words on your custom letter read well. Print one out and read it to yourself and imagine who is going to receive the letters.

A Managed Authentic Communication

These suggestions are not designed to help you fake a caring heart! We obviously want to communicate to our church members in a meaningful and real way, it's just that sometimes technology can be a hindrance, instead of a help! One way of checking that your letters sound as they should is to read one addressed to you! Check yourself if you would be happy to receive this letter yourself.

Creating your first Custom Letter

Here are a few simple steps to creating your first custom letter.

Step 1

Have a think about the audience or recipients of your letter. Make sure you word the letter nicely for them

Step 2

Just type a letter like you normally would. If it helps, even put in a person's name.

Dear Peter and Helen,

Thanks heaps for ...

Regards

John Smith
Pastor

Step 3

Insert fields for information to be entered into the letter. Use the Object icon on the toolbar, or just right click where you want to add a field.

Step 4

Save your letter and use the [Preview](#) button on the toolbar to test run your letter

Step 5

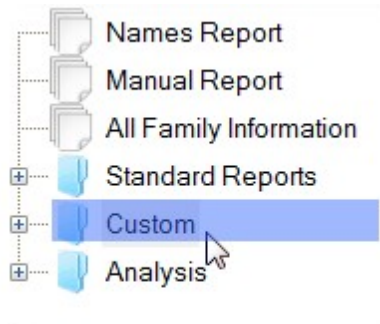
make any fine tuning / formatting changes, then go to [Create Reports](#) from the Explore Tab on the main menu to run your report (Custom Letter) See [Using Custom Letter](#).

Using Custom Letter

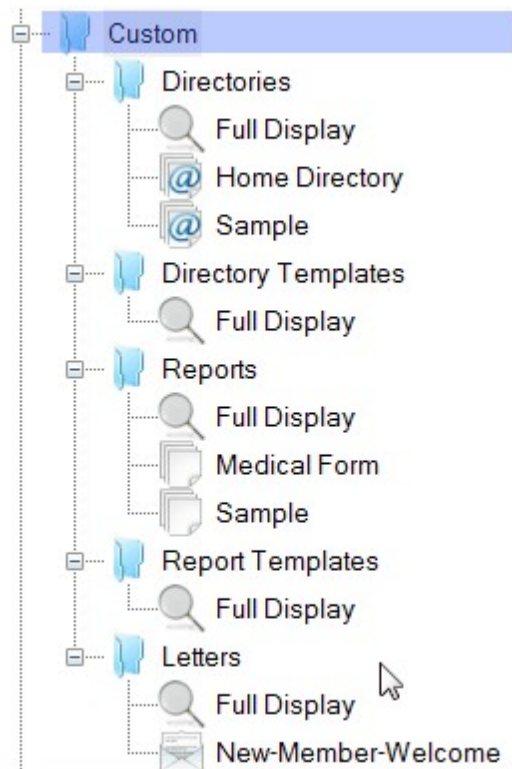
Designing your own custom letters is one thing, but how do you use them? When you create a Custom Letter, Pastoral Care adds them to the list of reports available throughout Pastoral Care.

See [Create Reports](#) for full details on using the main Reporting area in Pastoral Care.

Anywhere you see our standard Report List you will find your Custom Directories, Reports and Letters. Simply select any [Filters](#) and other options that need to narrow down your report to just the people you want, and then find your Custom letter in the list and double click it!



Click on Custom (shown above) to display and use all of your custom Directories, Reports and Letters. (Shown below)

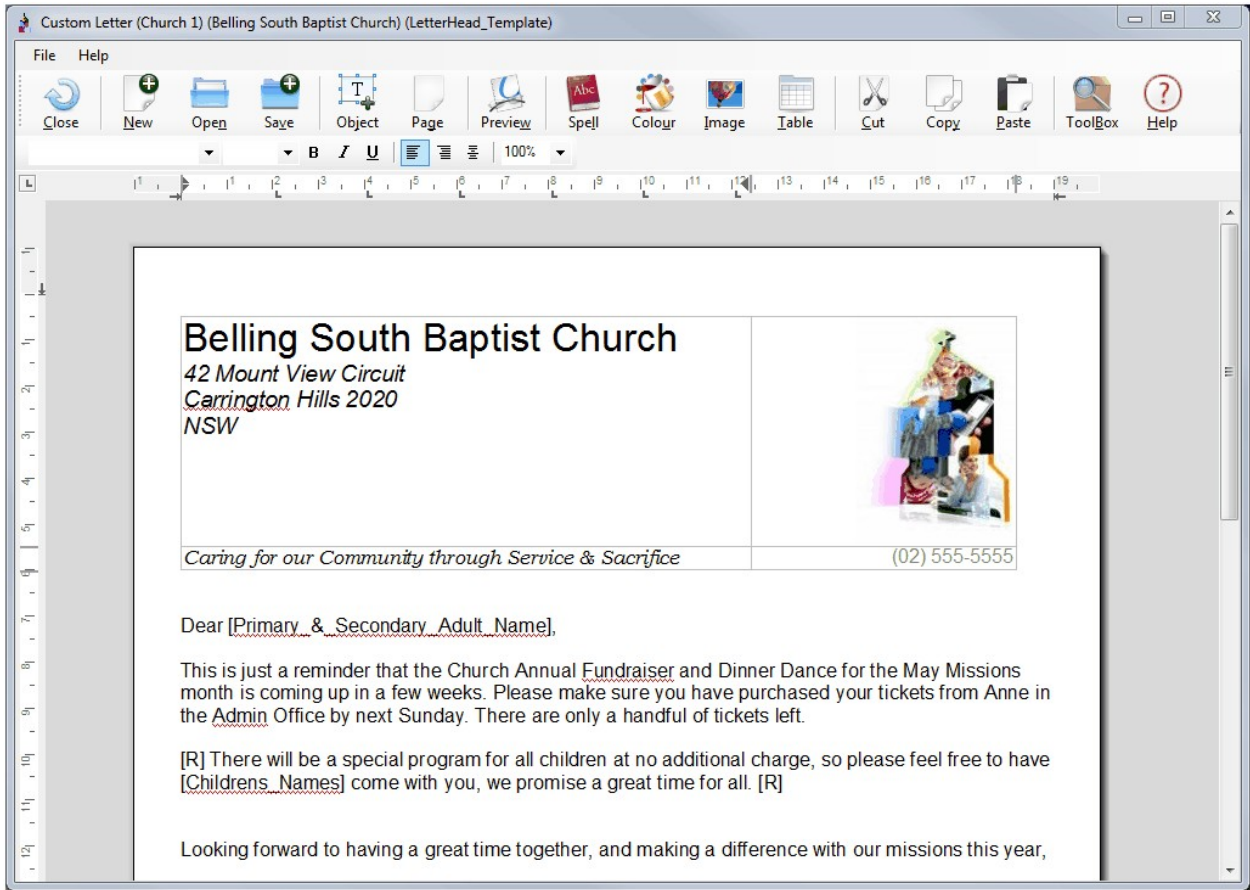


Custom Letter Main Window

Shown below is the Custom Letter Main Window.



Click on each part of this window to learn more...



Font Options



Use the Font Options toolbar to set the font options for the selected text. These options include Font Name, Size, Formatting such as **Bold**, *Italics*, Underline and also alignment options.

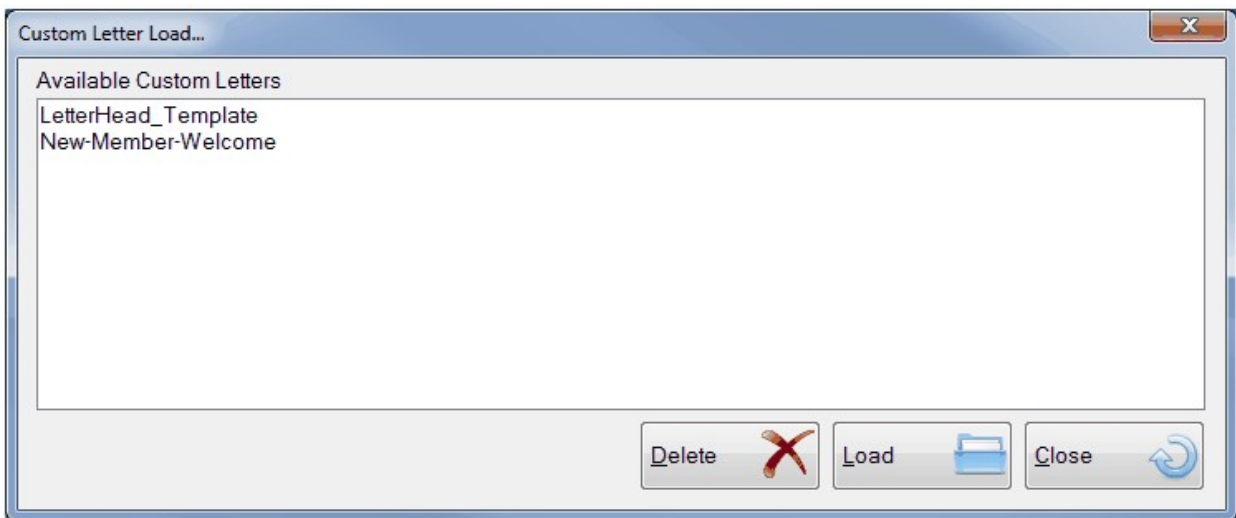
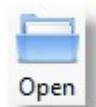
New

Press the New button to create a new blank Custom Letter ready to start typing again.



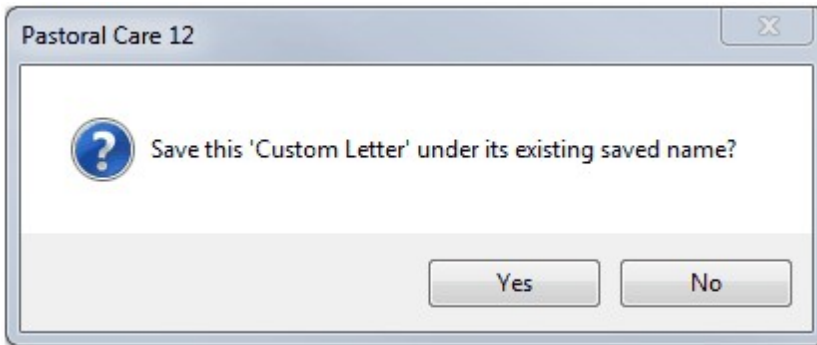
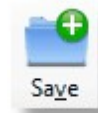
Open

Press the Open button to show the Custom Letter Open window. (Shown below) If you have no more use for a particular letter you have written, simply select it in the list and press the Delete Button.



Save

Press the Save button to save your new custom letter, or to save any changes to your letter. If you are saving a letter that has already been created and saved before, the following options are presented to you:



Choose YES to just save that letter again, or press NO to let you save the current Custom Letter as a new file name, effectively making a copy of the existing file.

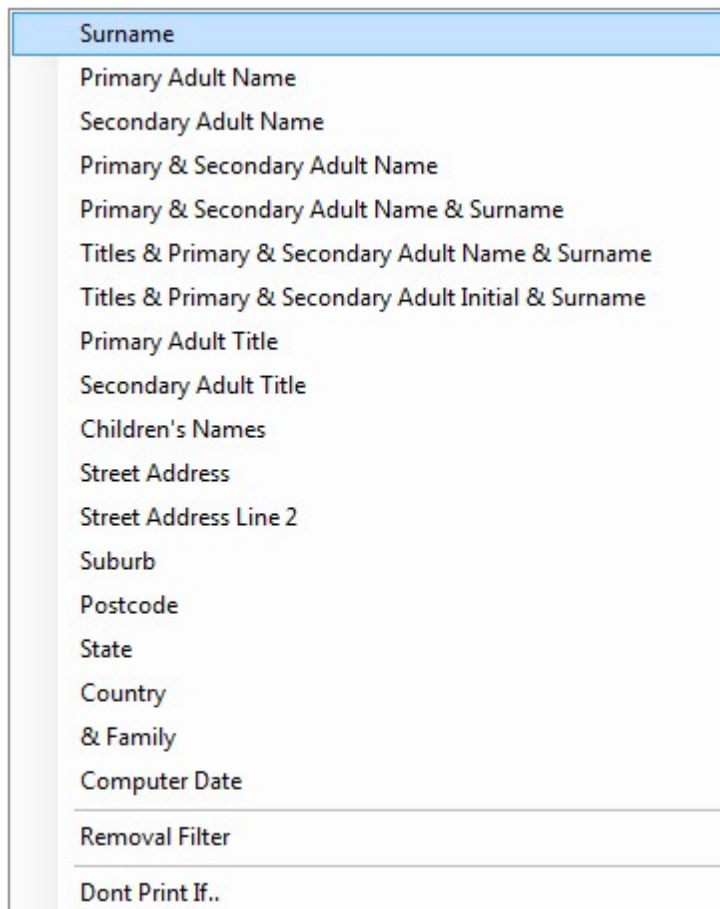
Object



The Object button lets you insert field names for use within your custom letter. This is the power of custom letter, you can write a letter, and insert people's names etc into the letter when you print or export the report as a PDF etc.

The Object List opens up either by clicking Object on the toolbar, or by Right Clicking on the letter where you wish to insert a field.

See also [Removal Filter](#) and [Don't Print Options](#) for more information on these special objects.



Removal Filter

Notice the letter "R" in square brackets in the example on the [Custom Letter Main Window](#) topic . This is a Removal Filter. Any words between the removal filters will be excluded from the letter if data is missing from the field that is present between the removal filters. (Only ONE field is allowed between a pair of removal filters)

Example: in our example in the [Custom Letter Main Window](#) topic (re-shown below) there is a sentence about Children's Entertainment. The Childrens Names object sit's between two [R] entries, therefore this entire sentence will only appear in letters to families that have children.

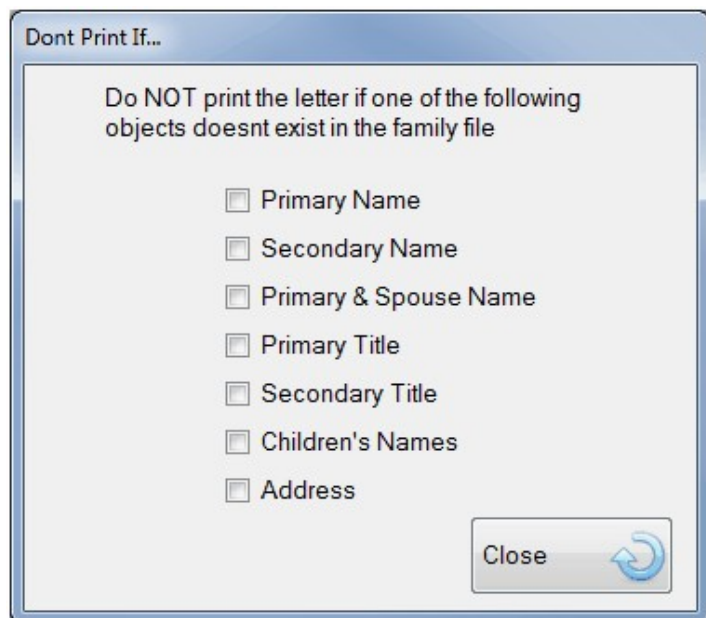
[R] There will be a special program for all children at no additional charge, so please feel free to have [Childrens Names] come with you, we promise a great time for all. [R]

Don't Print Options

The Don't Print Options lets you select one or more fields to filter out a letter if some information is missing from the family file.

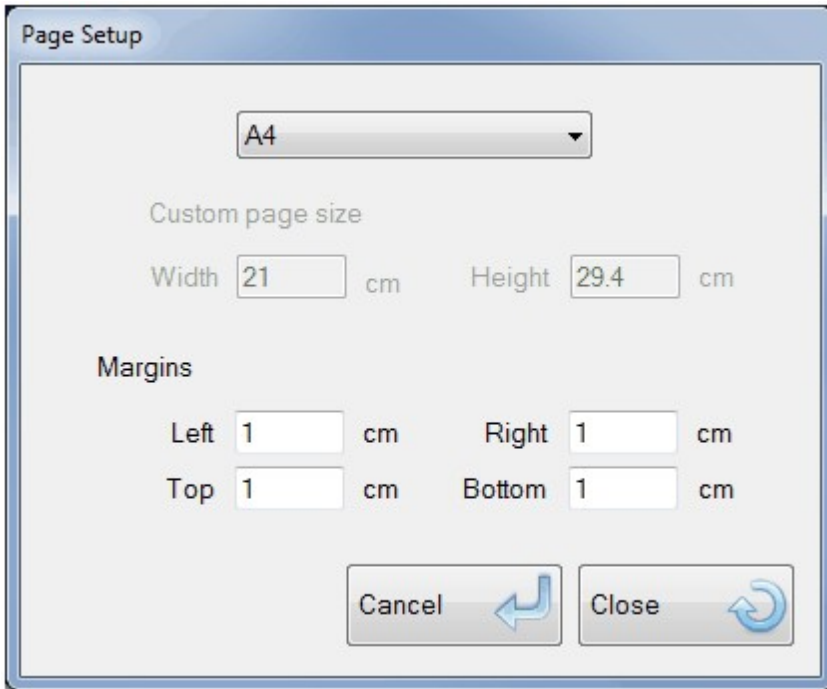
The Object List opens up either by clicking Object on the toolbar, or by Right Clicking on the letter where you wish to insert a field.

See also [Removal Filter](#) and [Don't Print Options](#) for more information on these special objects.



Page

Use the page options to set the page size and margin settings.



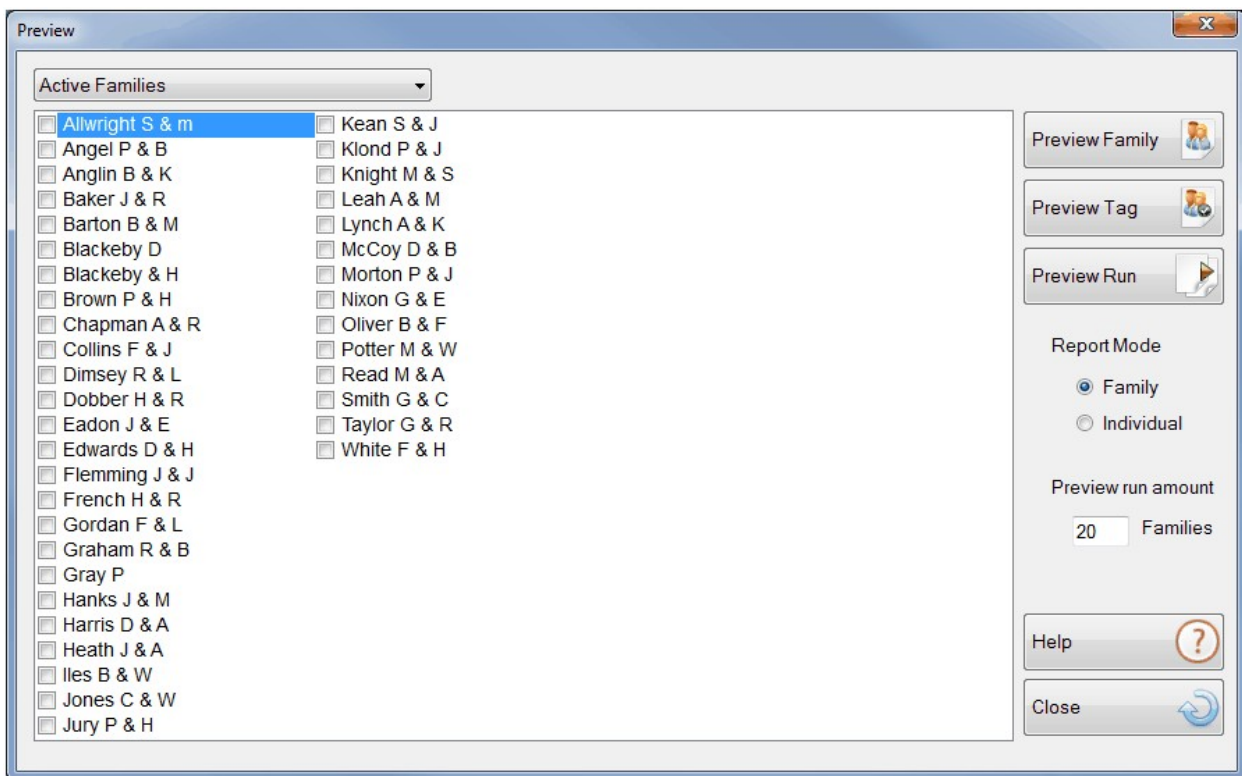
Preview



The Preview feature allows you to select a family, or a range of families / individuals for testing out your new Custom Letter. This is not the area to run your report from, rather it is just a preview / test drive.



Click on each part of the Preview Window below to learn more about this feature.



Family Filter

Select a Family Filter for running your preview on. For most people, Active Families as the default is perfect for this job!

Active Families

Select Families

If you want to run on a single family, or a few manually selected families, tag (tick) those families that you want to run the current Custom Directory / Report on.

<input type="checkbox"/> Allwright S & M	<input type="checkbox"/> Hanks J & M
<input type="checkbox"/> Angel P & B	<input type="checkbox"/> Harris D & A
<input type="checkbox"/> Anglin B & K	<input type="checkbox"/> Heath J & A
<input type="checkbox"/> Baker J & R	<input type="checkbox"/> Iles B & W
<input type="checkbox"/> Barton B & M	<input type="checkbox"/> Jones C & W
<input type="checkbox"/> Blackeby D	<input type="checkbox"/> Jury P & H
<input type="checkbox"/> Blackeby & H	<input type="checkbox"/> Kean S & J
<input type="checkbox"/> Brown P & H	<input type="checkbox"/> Klond P & J
<input type="checkbox"/> Chapman A & R	<input type="checkbox"/> Knight M & S
<input type="checkbox"/> Collins F & J	<input type="checkbox"/> Leah A & M

Report Mode

Choose to run your report preview in Family Mode, or Individual Mode.

Report Mode

Family Individual

Preview Run Amount


If you are going to do a Preview Run, that is a number of families, enter how many families you want to output to your report preview.

Preview run amount

20 Families


Preview Family

Pressing this button will only run the selected report template on the currently highlighted (no Tagged) family.

Preview Family 

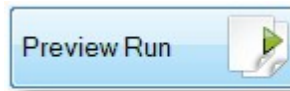
Preview Tag

Pressing this button will only run the selected report template on the currently tagged (not highlighted) families.

Preview Tag 

Preview Run

Press this button to let Pastoral Care preview the report template for the first x number of families it finds in your database.



Spell

Access the Spell Checker Settings.

As a suggestion, when ever a field name fails the spell checker, use Add to Dictionary so that eventually the field names will be ignored.



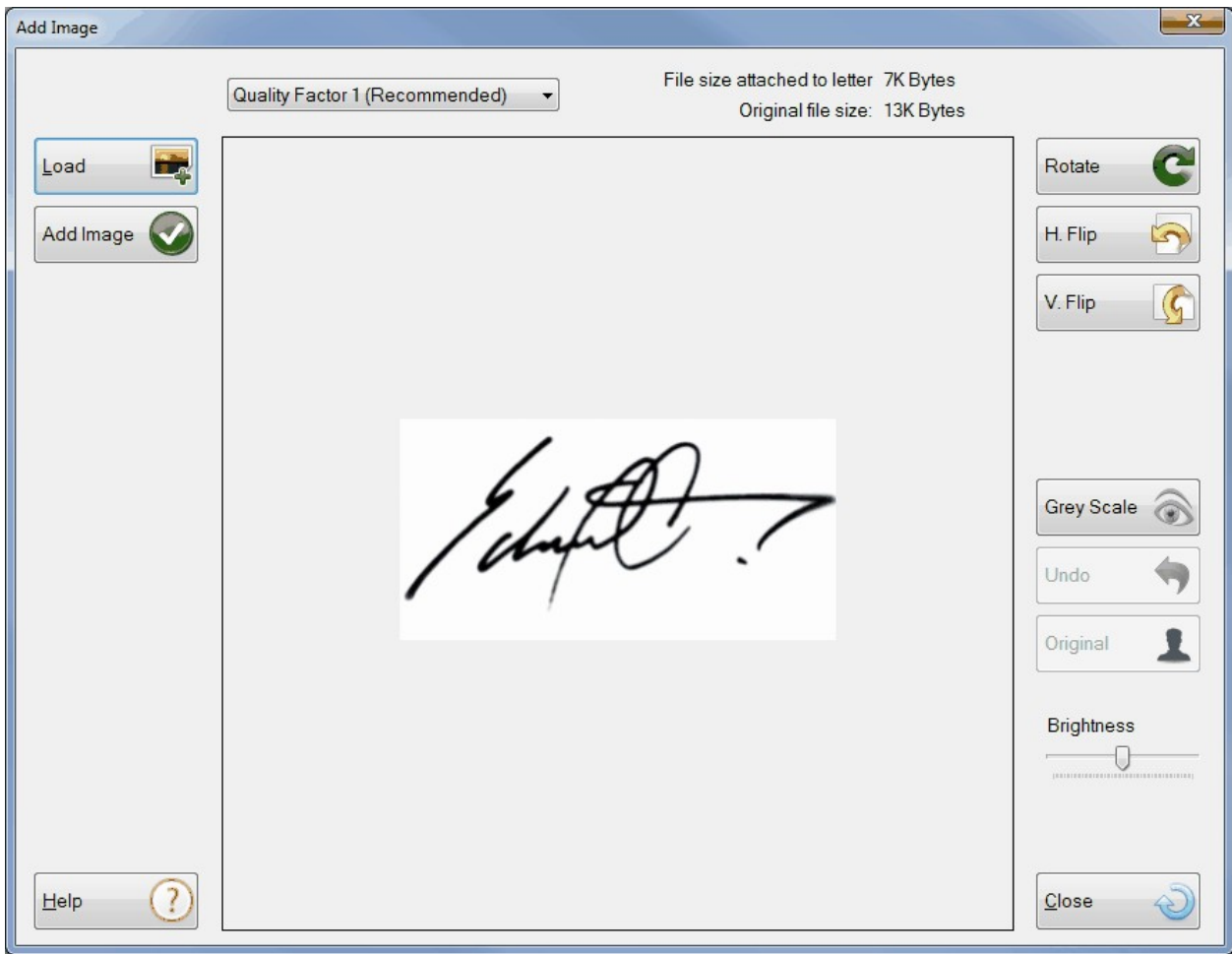
Colour

Change the colour of the selected text, or change the colour of the text you are about to type. You can also use this option to set a text background colour to use as a highlighter type effect.



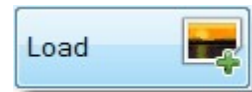
Image

Click on each part of the Add Image box below to learn more about adding an image to an email. Note, once an image has been added to an email, you can select and re-size the image from the email itself before sending it out.



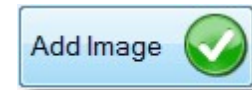
Load

Load an image from a file to be added to the Custom Letter.



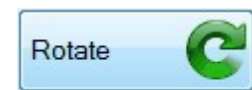
Add Image

Add the selected (and modified if you have done any modifications) image to the current position in the Custom Letter. Note once an image has been added, you cannot re-size the image directly in the Custom Letter, you will need to play around with the size of the original image or the Load Image Size option to re-size the image when placed in the letter.



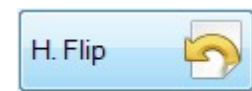
Rotate

Rotate the image 90 Degrees to the right. Keep pressing this to continue the rotation in 90 degree steps.



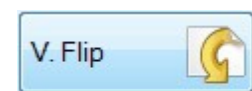
H Flip

Flip the picture (mirror) horizontally.



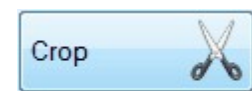
V Flip

Flip the picture (mirror) vertically.



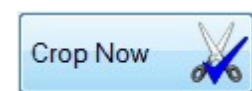
Crop

Select an area of the picture to crop.



Crop Now

After marking an area with Crop, press the Crop Now button to complete the crop.



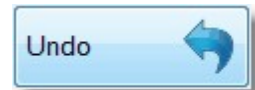
Grey Scale

Convert the picture to grey tones only.



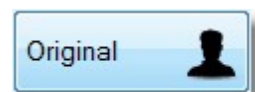
Undo

Where available, you can press this to undo the last edit to the picture.



Original

Use this to reload the original picture and discard all of your changes.



Brightness

Adjust the brightness of the picture.



Quality Factor

Quality Factor 1 (Recommended) ▼ File size attached to letter 7K Bytes
Original file size: 13K Bytes

We recommend a Quality Factor of 1 for most logos for church letters. A Quality Factor of 5 will produce a larger file size than a Quality Factor 1 option. The original and projected file save size is shown next to the Quality Factor Selection.

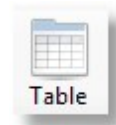
Image Preview

This shows a preview of the selected image to be inserted in the email.



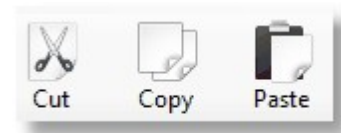
Table

Use the features of a table to assist in accurate placement of words and pictures alongside each other or above and below each other.



Cut, Copy, Paste

Use these standard clipboard controls for manipulation of information into and out of custom letters. IF you want to add a picture to your letter (say a church logo) please use the [Image](#) button on the toolbar for best results.



Backup Data

Backing Up your Pastoral Care information is vitally important. Many people never think to backup their information on a regular basis, and if you are one of those people, you are simply asking for trouble.

Here are a just a few things that can go wrong with your information in Pastoral Care.

- Lightning Strikes
- Theft
- Power Surges / Power Outages
- Hard Disk Failure
- Fire, Flood, etc
- Accidental Damage to your data... "Oops..."
- Malicious / Intentional Damage to your data

A Backup is a COPY of your valuable information that is stored in a safe place.

This safe place is NOT:

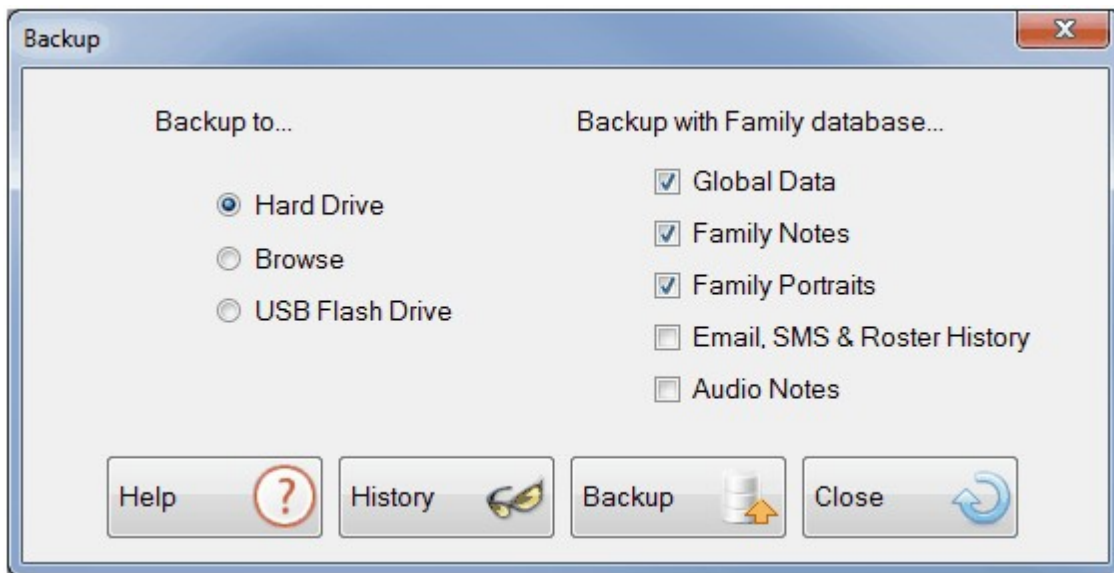
- In the same room or building that your computers are used in
- Sitting on top of the computer you use
- Plugged in 100% of the time into anything

Backing Up is Simple.

Go to Utilities from the main menu of Pastoral Care, and press Backup. The following window opens up.



Click on each part of this window below to learn more.



Backup To

- Hard Drive
- Browse
- USB Flash Drive

Choose any of the 3 backup devices.

Hard Drive

Automatically backup to the Pastoral Care backup folder. This can be found in:

C:\Pastoral_Care_Data\Pastoral_Care_12_Data\Church1\BackupX

This is the default location for a local hard disk installation. On a network C: will be your network drive (for example P:)

Note the BackupX folder name will be Backup1, Backup2... Backup 5. The last 5 backups are automatically cycled through these folders. The restore program allows you to select a restore point based on Date and Time.

Browse

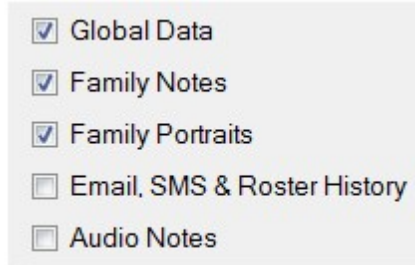
Use Browse to allow you to choose the location that you want to backup to yourself.

USB Flash Drive

Use this option to allow pastoral care to automatically locate and select a USB flash disk. If you are having trouble using this feature, you can try the Browse option instead of this option.

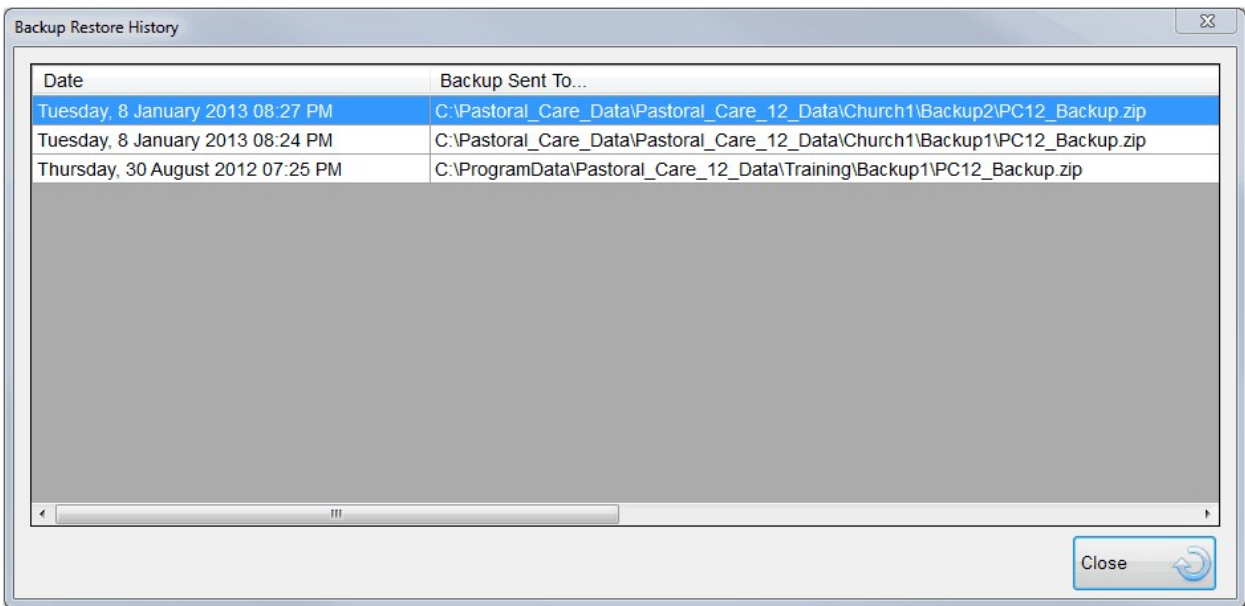
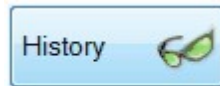
Backup with Family Database

By Default, the minimum amount of information backed up is the family database. To backup everything, tick all options here.



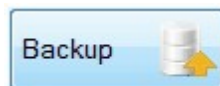
History

Press the History button to show the backup history.



Backup

Press this button to carry out the backup process selected.



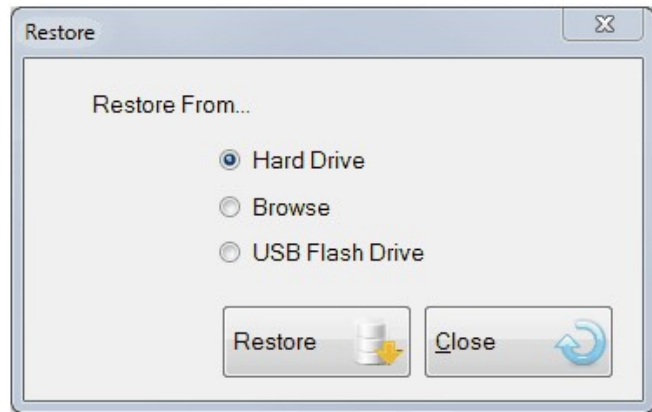
Restore Data

The Restore option allows you to put back Pastoral Care to a previous state. This is a really simple process to complete, but it can get you into a big load of trouble. If you restore the wrong backup of your data, and you do not have one to go back to that may be a better copy, you can leave yourself caught short.

Remember....

BEFORE restoring information from a Backup File, please do a quick backup to a browse location or USB device so you create for yourself, a personal "oops" undo file!

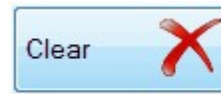
To complete a restore, simply select the device, and press Restore. Pastoral Care will direct you to locate the file and it will then complete the restore process.



File Clearance

File clearance allows you to remove large chunks of Pastoral Care data. **WARNING - DO NOT USE THIS FEATURE WITHOUT FIRST PERFORMING A BACKUP.** See [Backup Data](#) for information on how to perform a backup.

Simply select an area from the menu and press the Clear button to complete the selected clearance.



The following areas can be cleared using this feature...

Church	Options exist on this selection to remove All Family Records (All People), Remove participation in ALL GROUPS and to remove all Individual Group History records
Status	Remove all people from a selected status
Individual Groups	Remove all people from a selected Individual Group
Ministry	Remove all people from an Active or a Potential Ministry
Medical	Remove all people from a Medical Group
Relationships	Remove all people from a Relationship Group
Individual Dates	Remove all people from an Individual Date group
Flexi Fields	Remove all people from a Flexi Field group
Occupation	Remove all people from an Occupation
Family Groups	Remove all people from a selected Family group
Family Dates	Remove all people from a selected Family Date group.
Roll	Clear all roll records, or records between a set range of dates from a selected Roll project
Financial	Clear all Financial Records, or Financial Records between a set range of dates from a selected Financial project
Weekly Statistics	Clear all Weekly Statistics records, or Weekly Statistics records between a set range of dates from a selected Weekly project

Pastoral Care 12

Pastoral tools for todays church.

Chapter 11

Setup Tab



(c) 1988-2013 PASTORAL CARE MINISTRIES

Setup Introduction

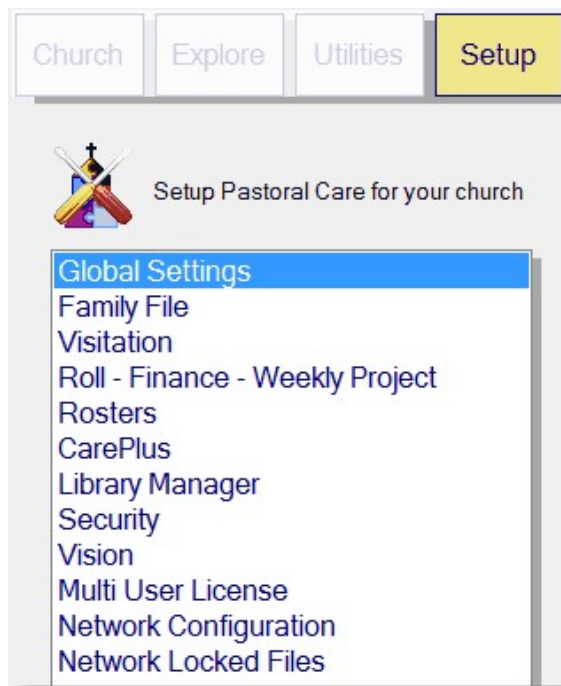
Pastoral Care can be configured to suit just about any church organisation. Before you use Pastoral Care, you should take the time to really think about how you manage people on your church, and how you would like to improve this if possible.

Pastoral Care has many different group like categories that allow you to place people into organisational and interest based structures. You can then use these groupings to communicate with people, manage people and organise the way you care for people in your church.

This is the area you use to customise Pastoral Care for your own needs. Information such as Group names, Status Definitions, Ministries and Projects just to name a few.

You will also find the [Security](#) Settings in this area. These are most important in locking down Pastoral Care to only those people who need access to certain types of information.

Please read this area completely before continuing to use Pastoral Care in your church.



**CLICK ON EACH MENU LIST ITEM ABOVE
TO NAVIGATE TO THAT AREA**

New In Version 12

There are a few important additions to Pastoral Care 12 that are described in detail throughout the manual in their various areas. These new features are in fact new data fields that need setting up in the Setup area of Pastoral Care.

Earlier Version Compatibility

Naturally, when we add a new data area to Pastoral Care, the information in the respective areas will be blank, as you did not have that information previously in your earlier version.

Most of your previous setup areas that you used in earlier versions of Pastoral Care will transfer across without change. Some areas have changed so much that they will need re-defining for Pastoral Care 12. Check out the table below and make sure you have reviewed your database settings for continued use.

Setup Section	New	Description	Known Conversion Issues
GLOBAL		See Setup - Global	
Database Titles	No		<i>No Conversion Issues</i>
General Options	No	Some New Features exist in here for compatibility with New Zealand address formatting	<i>No Conversion Issues</i>
SMS Configuration	No		<i>No Conversion Issues</i>
SMS Tracking	No		<i>No Conversion Issues</i>
Email Tracking	No		<i>No Conversion Issues</i>
Mailing Labels	Yes	You can now define multiple Mailing Label Styles as you need. Prior versions only had 1 setup for mailing labels	<i>Existing Setup will be converted with the ability to add more label designs if required</i>
Name Tag	Yes	You can now define multiple Mailing Label Styles as you need. Prior versions only had 1 setup for mailing labels	<i>Existing Setup will be converted with the ability to add more name tag designs if required</i>
Mapping	No		<i>No Conversion Issues</i>

Setup Section	New	Description	Known Conversion Issues
Audio	No		No Conversion Issues
FAMILY FILE		See Setup - Family File	
Status	No		No Conversion Issues
Individual Groups	No		No Conversion Issues
Ministry	No		No Conversion Issues
Medical	Yes	Define NEW medical conditions for tracking against Individuals	New Feature, no conversion from earlier versions
Relationships	Yes	Define NEW relationships for linking people in the church across Family Files, but linked via a relationship.	New Feature, no conversion from earlier versions
Individual Dates	No		No Conversion Issues
Flexi Fields	No		No Conversion Issues
Family Groups	No		No Conversion Issues
Title	No		No Conversion Issues
Occupation	No		No Conversion Issues
Suburb	No		No Conversion Issues
State / Country	Yes	An Existing Data Field(s) however you can now define your own look-up lists for State and Country	No Conversion Issues
VISITATION		See Setup Visitation	
Visitation	Yes	Visitation has been expanded. There are new setup fields for this area.	No information from earlier versions of Visitation Management can be converted. Family Visitation Notes are kept intact when converted to PC12

Setup Section	New	Description	Known Conversion Issues
ROSTERS		See Setup Rosters	
Rosters	No	All existing Roster Features are fully supported in PC12	<i>No Conversion Issues</i>
CARE PLUS		See Setup CarePlus	
CarePlus	No	All Existing CarePlus features are fully supported in PC12	<i>No Conversion Issues</i>
LIBRARY MANAGER		See Setup Library Manager	
Library Manager	No	All Existing Library features are fully supported in PC12	<i>No Conversion Issues</i>
SECURITY		See Setup Security	
Security	No	Security Setup has been completely overhauled to facilitate increased security and usernames as well as passwords	<i>Existing Security setup will be removed during data conversion, you will need to setup Security Settings again</i>
VISION		See Setup Vision	
Vision	No	Existing Feature fully supported in PC12	<i>No Conversion Issues</i>
NETWORK		See Setup Network Configuration	
Networking	No	Existing Feature fully supported in PC12	<i>No Conversion Issues</i>
LOCKED FILES		See Unlocking Files	
Networking	No	Existing Feature fully supported in PC12	<i>No Conversion Issues</i>

Setup - Global

The Global Setup area (Previously Called Global Database Variables) allows you to setup areas of Pastoral Care that affect the overall operation and configuration of Pastoral Care 12.

These settings are COMMON for all 7 church database files, if you are using multiple databases.



Click on each menu item below for full details on each section of the Global Settings area.

- Database Titles
- General Options
- SMS Configuration
- SMS Tracking
- Email Configuration
- Email Tracking
- Mailing Labels
- Name Tag
- Mapping
- Audio

Database Titles

Enter a title for each of the church databases that you are using. If multiple databases are setup here, Pastoral Care will offer you a selection at login to choose the database that you wish to load.

Church 1	<input type="text" value="Belling South Baptist INC."/>
Church 2	<input type="text" value="1st Belling Scout Group"/>
Church 3	<input type="text"/>
Church 4	<input type="text"/>
Church 5	<input type="text"/>
Church 6	<input type="text"/>
Church 7	<input type="text"/>

General Options




Click on each area of the graphic shown below to learn more about each part of this setup area.

General Options...

Address Format Australia New Zealand


Compact Pastoral Care database after entering the program times




Default Report Formatting Family Individual

Enable Backup option when exiting Pastoral Care

Set a default path for the Backup files



Set default path for exporting reports from the Report Viewer



Main Menu Tab active, Family File data active & CarePlus Tabs Colour

Disable portraits at Main Menu, Roll & Finance

Disable Splash Screen Fading


Address Format

Address Format Australia New Zealand

Choose Australia or New Zealand. If you are in another country, try either and see how the Family File - Address area looks. This option only affects the fields for Address.

Compact

Compact Pastoral Care database after entering the program times

Compact Now 

From time to time, Pastoral Care will want to compact the database. This is a data management activity that should be performed occasionally. The default setting is for Pastoral Care to compact every 150 times it is used. You can manually compact by pressing the Compact Now button.

Note, Pastoral Care will not be able to compact the database unless all users on a Network Installation of Pastoral Care have closed Pastoral Care on their computers.

Default Report Format

Default Report Formatting Family Individual


Pastoral Care formats its reports in either Family Mode or Individual Mode. This can be set in the various reporting areas throughout the program.

You can set the default mode here.

Backup Options

Enable Backup option when exiting Pastoral Care

Set a default path for the Backup files

Backup Folder 

We highly recommend ticking the option to Backup Pastoral Care on exit. You can also use the Set Default Path option to save a default location for backing up to.

See also [Backup Data](#) for more information on how to backup your Pastoral Care data.

Report Export Path

Set default path for exporting reports from the Report Viewer

Export Folder



Tick this option to allow you to set your own default disk location for report exports.

Tab Colour

Main Menu Tab active, Family File data active & CarePlus Tabs Colour



Khaki



Changing the colour here will change the colour of the Main Menu main tab buttons, the Tab Buttons in CarePlus and the highlight colour on the Family File list menu.

Portrait Privacy

Disable portraits at Main Menu, Roll & Finance

In a number of areas, Pastoral Care can display family photos as a visual prompt. You can disable this option by un-ticking it here.

Splash Screen Option

Disable Splash Screen Fading

When Pastoral Care starts, our splash screen fades in gently. You can speed up the load of Pastoral Care by ticking this option. This is particularly useful if you are using Pastoral Care on a remote connection.

Note, Logo Fading is not supported on all Windows Operating Systems.

SMS Configuration

Pastoral Care allows you to send SMS text messages easily and cheaply with integrated features that work with www.msglobal.com




See [SMS Manager](#) and [SMS](#) for more details on how to use SMS messaging in Pastoral Care.

Use the SMS tab to setup the account information for using SMS messages in Pastoral Care. This settings area is shown below.



Click on each area of the graphic below to learn more.

SMS Configuration...

[How to Setup SMS](#)  [Create SMS Account](#)  [Send a Test SMS](#) 

Country: Australia
 New Zealand
 Other Country

User Name: Password:

Default Return Mobile Number: Cost per Text: Cents

International Mobile Area Code: Eg: Australia is 61, New Zealand is 64

Local Area Code for Landline: Eg: Vic/Tas is 03, NSW is 02 Qld is 07, other states are 08

First two digits of mobile numbers: Eg: Australia is 04, New Zealand is 02

Notify when credit falls below \$

How to Setup SMS

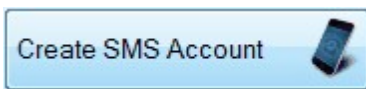
For first time setup follow these simple steps.

1. Press the Create SMS Account button in the SMS Setup Area.
2. A Web Page should open to www.msglobal.com
3. Select the link for New User
4. Complete the online application
5. SMS Global will send you your username in an email, and will send you a text message with your password
6. Complete the setup of Pastoral Care by entering in your account settings (username and password) into the SMS Configuration area.

NOTE: At the time of publishing, www.msglobal.com.au were offering their accounts free of sign up costs, no ongoing account fees, and 25 free text messages to get you started. This can change without notice, but has been a standard account setup feature for many years.

See also [SMS Configuration](#) for more information.

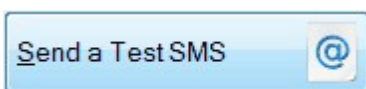
Create SMS Account



Press this button to be taken to the SMS Global Web Site for creating an SMS Account.

(Note, a church can have multiple accounts for different areas of administration. Each of the SMS accounts can be individually linked to a login for Pastoral Care in the Security Setup Area. See [Setup Security](#) for information on this)

Send a Test SMS



Press this button to allow you to quickly type a test message and send it to a manually entered mobile phone.

Country

Country: Australia
 New Zealand
 Other Country

Choose your country of origin. Your choice here is important to be certain of reliable message broadcasts. Each country has different features enabled, see the feature list below for full details.

Country	TXT Message	TXT to VOICE	TXT to FAX
Australia	YES	YES	YES
New Zealand	YES	NO	NO
Other Country	YES	NO	NO

TXT Message

Standard 160 Character Text Message. You can send more than 160 characters in one message, however each 160 characters costs 1 text message charge, The largest text message you can send is 5 standard messages together, being 5 x 160 characters in total length.

TXT To Voice

Only available in Australia. If a person answers a Land Line number that a text message is being sent to, a computer generated voice will guide the person through the selection to hear the message.

TXT To Fax

If a Fax Machine answers a text message send, then the message will be converted to FAX

Account Settings

User Name:	<input type="text"/>	Password:	<input type="text"/>
Default Return Mobile Number:	<input type="text"/>	Cost per Text:	<input type="text" value="8"/> Cents

User Name

Enter your SMS GLOBAL user name for the default SMS Global Account

Password

Enter your SMS GLOBAL password for the default SMS Global Account

Default Return Mobile Number

Enter a return mobile phone number if you want people to be able to reply to your message.

Cost Per Text

Enter the current price that you have on offer from SMS global in cents per text. This setting is used so that Pastoral Care can estimate the cost of sending messages etc.

International Mobile Area Code

International Mobile Area Code:	<input type="text" value="64"/>
---------------------------------	---------------------------------

Enter your 2 digit country code for your International Mobile area code. If you are in Australia or New Zealand this field will be filled in for you.

Local Area Code

Local Area Code for Landline:	<input type="text"/>	Eg: Vic/Tas is 03, NSW is 02 Qld is 07, other states are 08
-------------------------------	----------------------	---

This field can only be filled in for Australia. Enter the Area Code for your state.

First Two Digits

First two digits of mobile numbers:	<input type="text" value="04"/>
-------------------------------------	---------------------------------

Enter the first 2 digit's that you use to send a text message or call a mobile phone in your country.

Notify

Notify when credit falls below \$	<input type="text" value="10"/>
-----------------------------------	---------------------------------

Enter an amount in Dollars to set a trigger for Pastoral Care to warn you that your account is going low.

SMS Tracking

Enter names and phone numbers (Mobile Numbers) of people that you want to use to receive tracking SMS messages. A Tracking SMS message is effectively a copy of a text message to allow someone else in your church to be able to see what messages are being sent with Pastoral Care.

SMS Tracking...

Surname	Given Name	Mobile Number
Holding	Peter	04441234567
Holding	Helen	04442345678



Email Configuration

Use the Email Configuration window to setup Pastoral Care to send emails. See also [Using Pastoral Care to Communicate](#) for more information on using Email to communicate with people.



Click on each part of the screen below to learn more about setting up Email for Pastoral Care.

Email Configuration...

[How to Setup Email](#)  [Send a Test Email](#) 

SMTP Server:

Server Authentication Required

 Username:

 Password:

Mail Authentication Required

 Mode:

Auto Detect Port & SSL

Enable SSL Mode

 SSL Mode:

 Port:

Disable 'Chunking' (For MsExchange Servers Only)

Your Email Address:

Your Name:

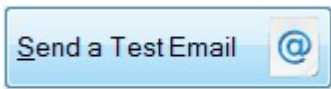
Activate Email Delay

 After emails delay sending by Seconds

Individual Email 'To:' Restriction

 Maximum amount of email addresses per email

Test Email



Press this button to manually send an email to test.

SMTP Server



Common SMTP settings

The most common SMTP server name is the one provided by your ISP (Internet Service Provider)

Some Examples:

- smtp.hotmail.com
- mail.bigpond.com
- mail.iinet.net.au
- etc

Your Own Email Server

If you are running a Windows Network with a Server and Domain, and you are using a Proxy Server for controlling access to Internet Services, then the SMTP address you enter in Pastoral Care is the Proxy Server name, (not an IP address). For example, if your proxy server is called AngelBaptist_Proxy then the SMTP address in Pastoral Care will be AngelBaptist_Proxy.

If you are not using proxy server as your internet access controller you can try any of the following settings for SMTP address:

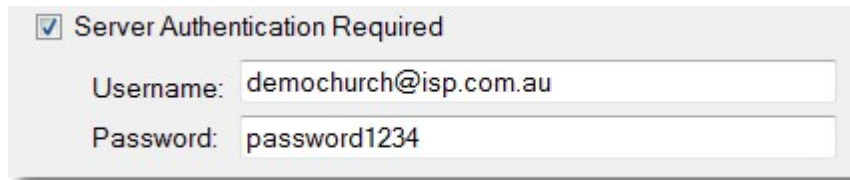
IP Address of your domain server (eg: 192.168.1.19)

Your Domain Name (angelbaptist.com.au)

Server Authentication

Not all email servers require authentication. Server Authentication is the process of sending an email address and password to the email server to say to the server: "Hi, you should know me, here is my credentials, please send the following emails for me..."

If you tick this option, you will need to fill in your email address (username) and your password. These two bits of information are supplied by your Internet Service Provider.



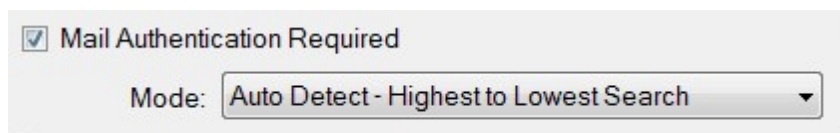
Server Authentication Required

Username:

Password:

Mail Authentication

Mail Authentication is a newer method of attempting to provide automated identification of non-spam messages. Some internet service providers are starting to adopt this requirement, however at present this is rarely used. We suggest an Auto Mode if this is required, however if you have the information from your ISP on what type of authentication is required, you can manually select it in the list.

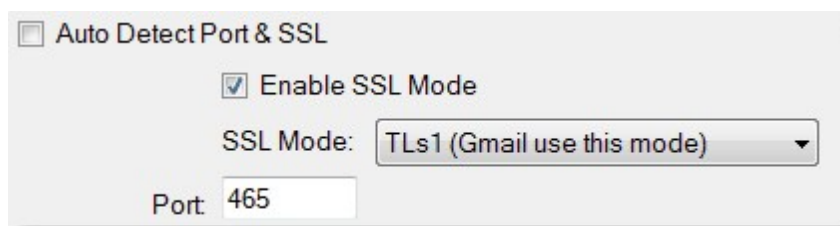


Mail Authentication Required

Mode:

PORT & SSL

We recommend using Auto Detect for the SSL and PORT settings. If you want to use GMAIL (Google Mail) as your SMTP email transmission service, the following settings should be entered in this area...



Auto Detect Port & SSL

Enable SSL Mode

SSL Mode:

Port:

Disable Chunking

ONLY tick this option if you are sending via a Microsoft Exchange Server, and recipients that are receiving your email via an exchange server also are receiving your message but it appears to be jumbled.

Your Details

Enter your email address that you want to be used as the sender (by default) and the name to be used as the sender. Note, if you setup Security, you can have multiple email "from" setups for each user of Pastoral Care giving you multiple reply to addresses.

Your Email Address:
Your Name:

Email Delay

To try and avoid being identified as a Spammer, setup an email delay here.

Activate Email Delay
After emails delay sending by Seconds

Email Queue

All email in Pastoral Care is now managed by a separate program called the Email Queue. You don't have to start this, it starts automatically. When using Email Delay, all emails are sent from Pastoral Care, immediately to the Queue program. This frees up Pastoral Care and your computer for doing other things without taking over the computer while emails are being transmitted. The Queue program will take all of the settings for email, including the Email Delay settings, and send them out as directed.

[See Email Queue](#) for more information on this feature.

Individual Email Restriction

When sending emails, by default, Pastoral Care sends one email to one person, individually addressed. If you choose to from the various email sending locations in Pastoral Care, you can choose to send one email to many people all addressed together in the "To" field.

This setting will limit the number of "TO" people you can add to one email.

Individual Email 'To:' Restriction
Maximum amount of email addresses per email

Depending on your internet provider, you may or may not have to use this feature, or even adjust this setting.

How to Setup Email

As a general rule, if you are setting up email for the first time, try all of our default settings. If these do not work, then change only one item at a time, and retest. For your convenience there is a Send Test Email button so you can test the settings.

See also [Email Configuration](#) for more information on setting up emails.

SMTP SERVER

At the very least, you will need this field filled in. Have a look in your current email program under Account Settings / Server and see if you can identify your SMTP server. This setting is provided by your internet service provider, as by default, all emails you send go out via your internet connection, to an email server that is provided by your Internet Service Provider.

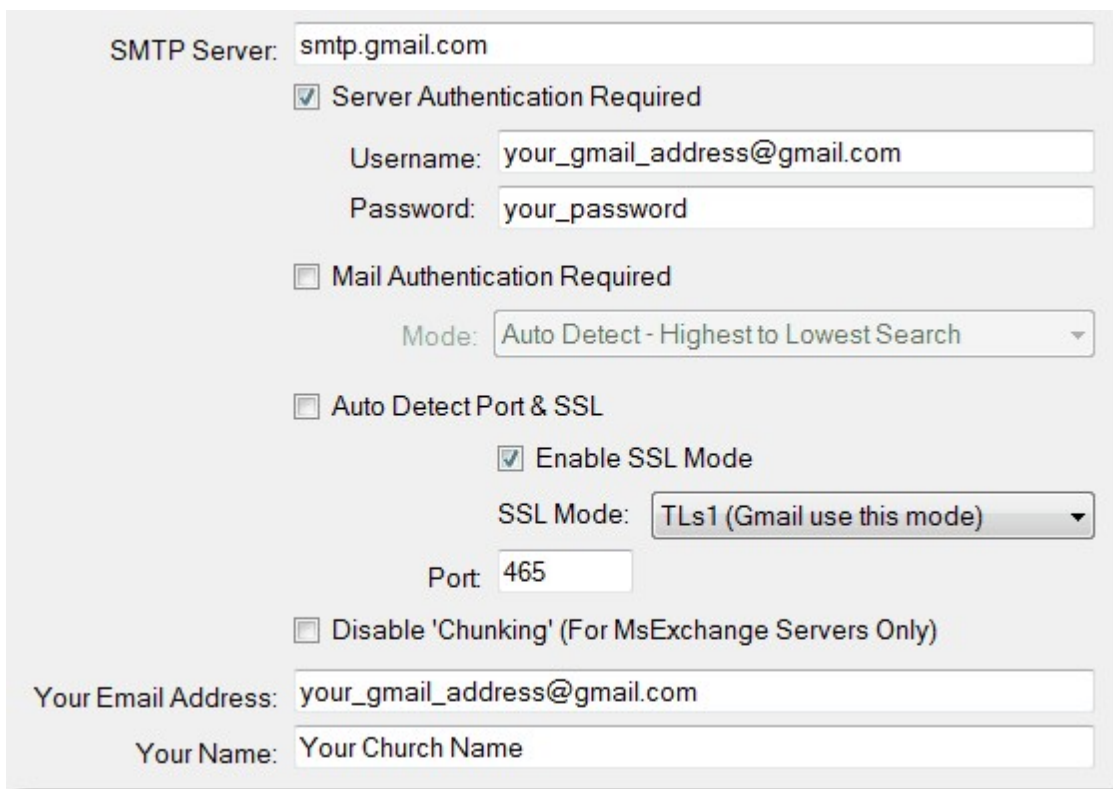
Avoid SPAM black listing

Even though church communications are not considered as SPAM under Australian Anti Spam Legislation, many ISP's (Internet Service Providers) consider that sending lots of emails at once is SPAM. This is not the case. (See [Using Pastoral Care to Communicate](#) for more details)

However, before you try and have that argument with your ISP, it is better to be safer than sorry, and try to fly under the radar in terms of how many emails you send at once. If you send too many, and your ISP puts you on a black list, about the only way to get off that list is to leave your ISP and go to another one!

Sending Email Via GMAIL

Google allow you to send email via their email servers if you have a GMAIL account. Google are generally less restrictive than other ISP's that host email servers. Shown below are the recommended settings for using GMAIL as your email sending server.



The image shows a screenshot of an email client's configuration window for an SMTP server. The settings are as follows:

- SMTP Server:** smtp.gmail.com
- Server Authentication Required**
 - Username:** your_gmail_address@gmail.com
 - Password:** your_password
- Mail Authentication Required**
 - Mode:** Auto Detect - Highest to Lowest Search
- Auto Detect Port & SSL**
 - Enable SSL Mode**
 - SSL Mode:** TLS1 (Gmail use this mode)
 - Port:** 465
- Disable 'Chunking' (For MsExchange Servers Only)**
- Your Email Address:** your_gmail_address@gmail.com
- Your Name:** Your Church Name

Email Tracking

Email Tracking is rather like an extension to a BCC (Blind Carbon Copy)





By setting up Email Tracking Address information here, you can enable Email Tracking in the Email Manager allowing for a copy of emails sent to be sent to one or more tracking addresses. The tracking email also includes a list of names that the email was sent to!

To enter an email tracking record, press the New button at the bottom of the tracking area, and type in the information in each grid cell as needed.

Email Tracking...

Surname	Given Name	Email Address
Enter Surname Here	Enter Given Name here	Enter Email Address Here

|||

New  Up  Down  Delete 

Mailing Labels

In previous versions of Pastoral Care, there was only capacity for one Mailing Label setup. Pastoral Care now allows you to use multiple label settings and save them under a profile name.

Create a New Label Profile



To add a new label setup, type the name in and press the blue + button.



After creating the profile name, select one in the list of Label Profile names and make the changes to the settings to reflect what that particular label looks like and how many fit on a sheet.



Click on each area of this setup feature below to learn more about this feature.

Mailing Labels...

Avery 54A +

Avery 54A

Avery 55A

Up ↑

Down ↓

Delete ✕

Preview

A
D

Address Information

Address Information

Address Information

Address Information

Labels across the page 1 2 3

A	60	mm
B	30	mm
C	1	mm
D	5	mm
Left margin within label	2	mm
Top margin within label	2	mm
Page top margin	10	mm
Page left margin	5	mm

Include title with names

Use Primary Adult's name only eg. Mr & Mrs Stephen Brown

Print '& Family' if children exist

Use initial only for given name

Print labels with address

Name Setup

Font Arial 10

Bold Italic Underline

Colour Black

Address Setup

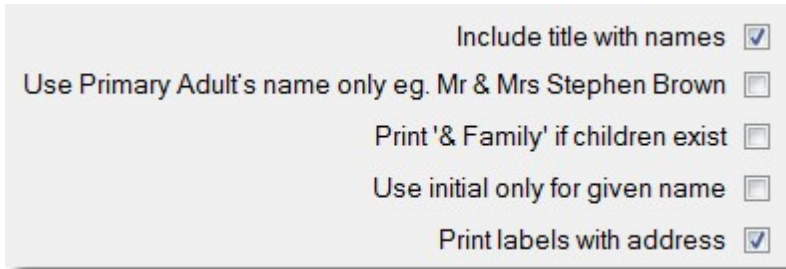
Font Arial 10

Bold Italic Underline

Colour Black

Address Options

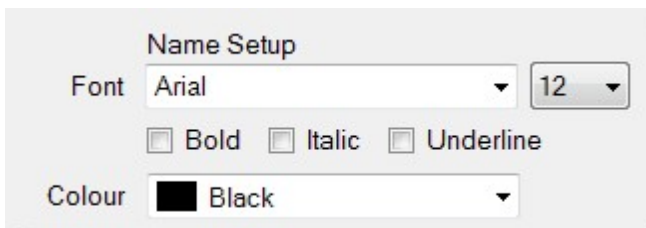
Tick the options that you need to include on the Mailing Labels. Note, the "Print Labels with address" must be ticked to include address information on the label. You can create labels without address information by un-ticking this option, or using [Name Tags](#) instead.



A dialog box titled "Address Options" with a light gray background. It contains five rows of text, each followed by a checkbox on the right. The first row is "Include title with names" with a checked checkbox. The second row is "Use Primary Adult's name only eg. Mr & Mrs Stephen Brown" with an unchecked checkbox. The third row is "Print '& Family' if children exist" with an unchecked checkbox. The fourth row is "Use initial only for given name" with an unchecked checkbox. The fifth row is "Print labels with address" with a checked checkbox.

Name Setup

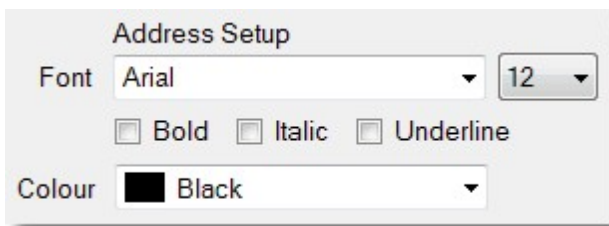
Choose the FONT properties for the Name part of an address. If you want the name to stand out a little more on the label, try using Bold as an option.



A dialog box titled "Name Setup" with a light gray background. It has a "Font" section with a dropdown menu set to "Arial" and a size dropdown set to "12". Below this are three checkboxes: "Bold" (unchecked), "Italic" (unchecked), and "Underline" (unchecked). At the bottom is a "Colour" section with a color swatch and a dropdown menu set to "Black".

Address Setup

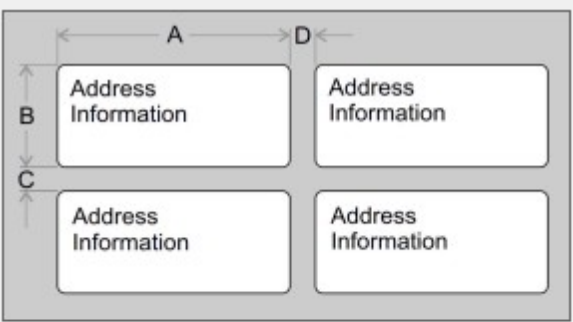
Set the Font properties for the Address part of the label.



A dialog box titled "Address Setup" with a light gray background. It has a "Font" section with a dropdown menu set to "Arial" and a size dropdown set to "12". Below this are three checkboxes: "Bold" (unchecked), "Italic" (unchecked), and "Underline" (unchecked). At the bottom is a "Colour" section with a color swatch and a dropdown menu set to "Black".

Label Size / Position

Use the measurements of your specific label to setup your labels to print out correctly. Refer to the diagram showing dimensions A,B,C and D as a reference for setting the label size and position correctly.



Labels across the page 1 2 3

A mm

B mm

C mm

D mm

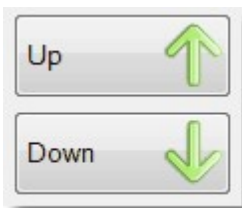
Left margin within label mm

Top margin within label mm

Page top margin mm

Page left margin mm

Sort



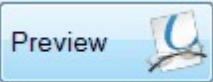
Sort the list of Mailing Label profiles. The setup you have at the top of the list will be the default setup used when printing Mailing Labels.

Delete



Delete the selected Mailing Label setup.

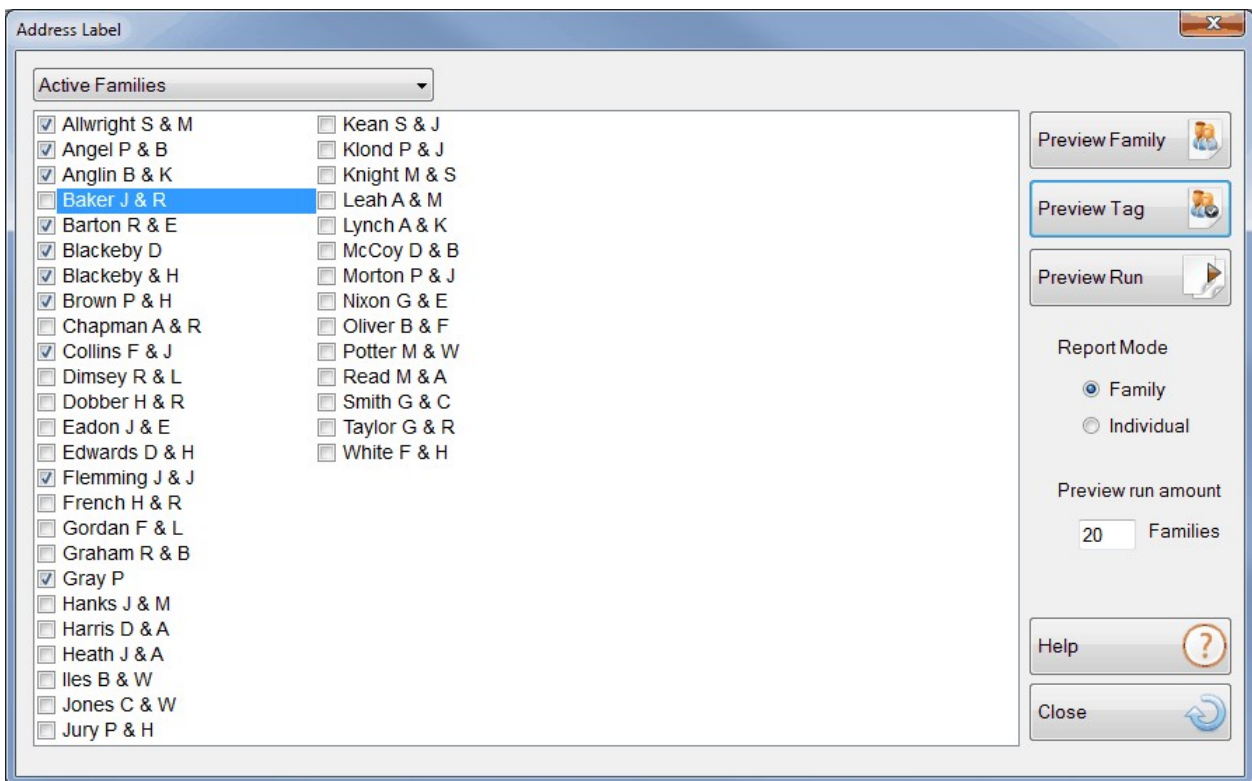
Preview



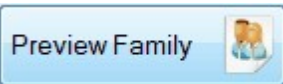
Use the Preview Option to test run the label setup. The quickest way to test run is to enter a number of families in the Preview Run Amount box and press Preview Run. This will select that number of families to output to the report viewer for printing.



Click on each area of the screen below to learn more about the Preview Mailing Label feature.

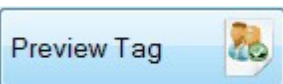


Preview Family



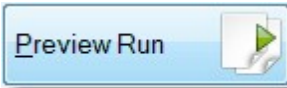
Press the Preview Family button to preview a single Family. The family that will be displayed on the report will be the highlighted family.

Preview Tag



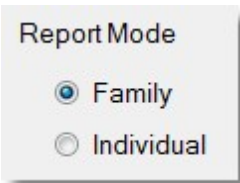
Press the Preview Tag button to preview all families that have been Tagged in this window.

Preview Run



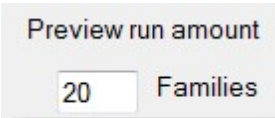
Use this button (Recommended) to preview a run of families as entered in the [Preview Run Amount](#) amount. The default is 20 families.

Report Mode



Choose to run the label report as an Individual Address Label, or as a Family address label.

Preview Run Amount

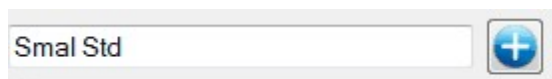


Enter the number of families that you want to preview.

Name Tag

In previous versions of Pastoral Care, there was only capacity for one Name Tag setup. Pastoral Care now allows you to use multiple Name Tag settings and save them under a profile name.

Create a New Name Tag Profile



To add a new Name Tag setup, type the name in and press the blue + button.



After creating the profile name, select one in the list of Name Tag names and make the changes to the settings to reflect what that particular label looks like and how many fit on a sheet.



Click on each area of this setup feature below to learn more about this feature.

Name Tag...

Small Std +

Large Std

Smal Std

Up ↑

Down ↓

Delete ✕

Logo 🌀

Preview 🖨️

Centre Name Tag Text left to right

Centre Name Tag Text top to bottom

Include border around Name Tag

Name Tag given name

Font Arial 12

Bold Italic Underline

Colour Black

Name Tag surname

Font Arial 12

Bold Italic Underline

Colour Black

A ← D

Name Tag Information

Name Tag Information

B

Name Tag Information

Name Tag Information

C

Labels across the page 1 2 3

A mm

B mm

C mm

D mm

Left margin within label mm

Top margin within label mm

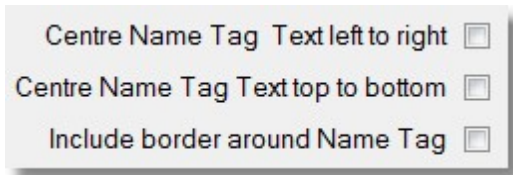
Page top margin mm

Page left margin mm

Name Tag Options

Tick the options that you need to include on the Name Tag.

Choose to center the name information left to right and or top to bottom



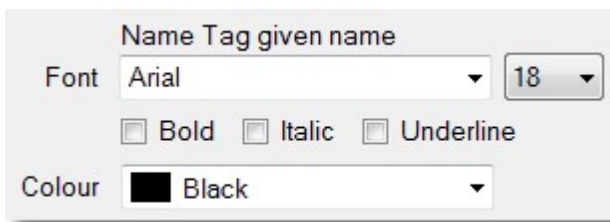
Centre Name Tag Text left to right

Centre Name Tag Text top to bottom

Include border around Name Tag

Given Name Setup

Choose the FONT properties for the Given Name part of the name tag. If you want the name to stand out a little more on the label, try using Bold as an option.



Name Tag given name

Font

Bold Italic Underline

Colour

Surname Setup

Set the Font properties for the Surname part of the Name Tag.



Name Tag surname

Font

Bold Italic Underline

Colour

Label Size / Position

Use the measurements of your specific Name Tag to setup your Name Tags to print out correctly. Refer to the diagram showing dimensions A,B,C and D as a reference for setting the size and position correctly.

Labels across the page 1 2 3

A mm

B mm

C mm

D mm

Left margin within label mm

Top margin within label mm

Page top margin mm

Page left margin mm

Sort



Sort the list of Name Tag profiles. The setup you have at the top of the list will be the default setup used when printing Name Tags.

Delete



Delete the selected Name Tag setup.

Logo



Press the Logo Button to open the following screen. From here you can set a logo to be printed on the name tag, and add other information to the name tag.



Click on each part of the screen below to learn more.

Name Tag Logo ✕

Include Logo Image

Church

Add

Delete

Current Logo

Logo height mm Top Position mm

Logo width mm Left Position mm

Include Text on 'Name Tag'

Text

Font

Bold Italic Underline

Colour

Top Position mm Left Position mm

Help Close

Include Logo Image

Include Logo Image

Tick this option to include an image on your Name Tag. If none exist in the list of logo images on this screen, press the [Add](#) button to add an image for use.

Add



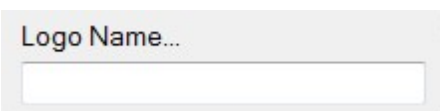
Press the Add Button to add a Picture file as an available Logo for use in Pastoral Care. The following Add Logo image control window is opened allowing you to load, manage and save a logo for use in Pastoral Care.



Click on each part of this window for more information.



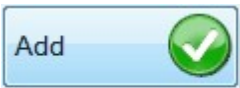
Logo Name



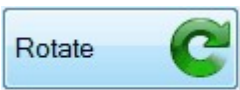
Give your logo a name that people will recognise in Pastoral Care.

Load

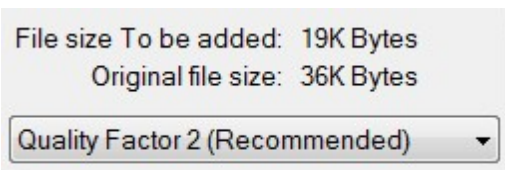
Press the Load Button to select an image to preview in the Name Tag Logo area, allowing you to further edit it before saving for use in Pastoral Care.

Add

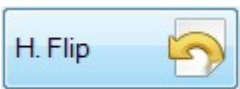
Press the Green Tick ADD button to complete the process of adding a Logo for use in Pastoral Care.

Rotate

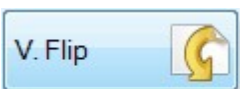
Rotate the image 90 Degrees to the right. Keep pressing this to continue the rotation in 90 degree steps.

Quality Factor

We recommend a Quality Factory of 2 for most images. A Quality Factor of 5 will produce a larger file size than a Quality Factor 1 option. The original and projected file save size is shown at the bottom of the Name Tag Logo preview, however we have shown it together here for clarity only.

H Flip

Flip the picture (mirror) horizontally.

V Flip

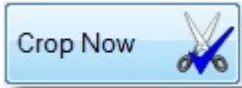
Flip the picture (mirror) vertically.

Crop



Select an area of the picture to crop.

Crop Now



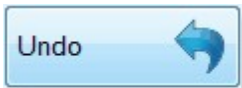
After marking an area with Crop, press the Crop Now button to complete the crop.

Grey Scale



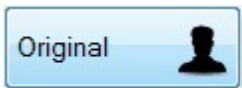
Convert the picture to grey tones only.

Undo



Where available, you can press this to undo the last edit to the picture. You can also use the [Original](#) button if Undo is not available.

Original



Use this to reload the original picture and discard all of your changes.

Brightness



Adjust the brightness of the picture.

Image Preview

This shows the selected image as it is about to be saved for use in Pastoral Care.

Delete

Delete the selected logo from this setup area.

Current Logo

Displays a preview of the currently selected logo.

Dimensions

Logo height	<input type="text" value="40"/>	mm	Top Position	<input type="text" value="5"/>	mm
Logo width	<input type="text" value="35"/>	mm	Left Position	<input type="text" value="52"/>	mm

Set the size and position of the logo to appear on the Name Tag.

Include Text

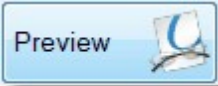
<input checked="" type="checkbox"/> Include Text on 'Name Tag'					
Text	<input type="text" value="Albert St Baptist"/>	Colour	<input type="text" value="Black"/>		
Font	<input type="text" value="Arial"/>	<input type="text" value="10"/>	Top Position	<input type="text" value="42"/>	mm
	<input checked="" type="checkbox"/> Bold	<input type="checkbox"/> Italic	<input type="checkbox"/> Underline	Left Position	<input type="text" value="5"/>
				mm	

Tick the Include Text option, and then enter some text (for Example a church or group name), and also set the font properties and position of the text to appear on the name tag.

Shown below is a sample logo with an Image, and some text.



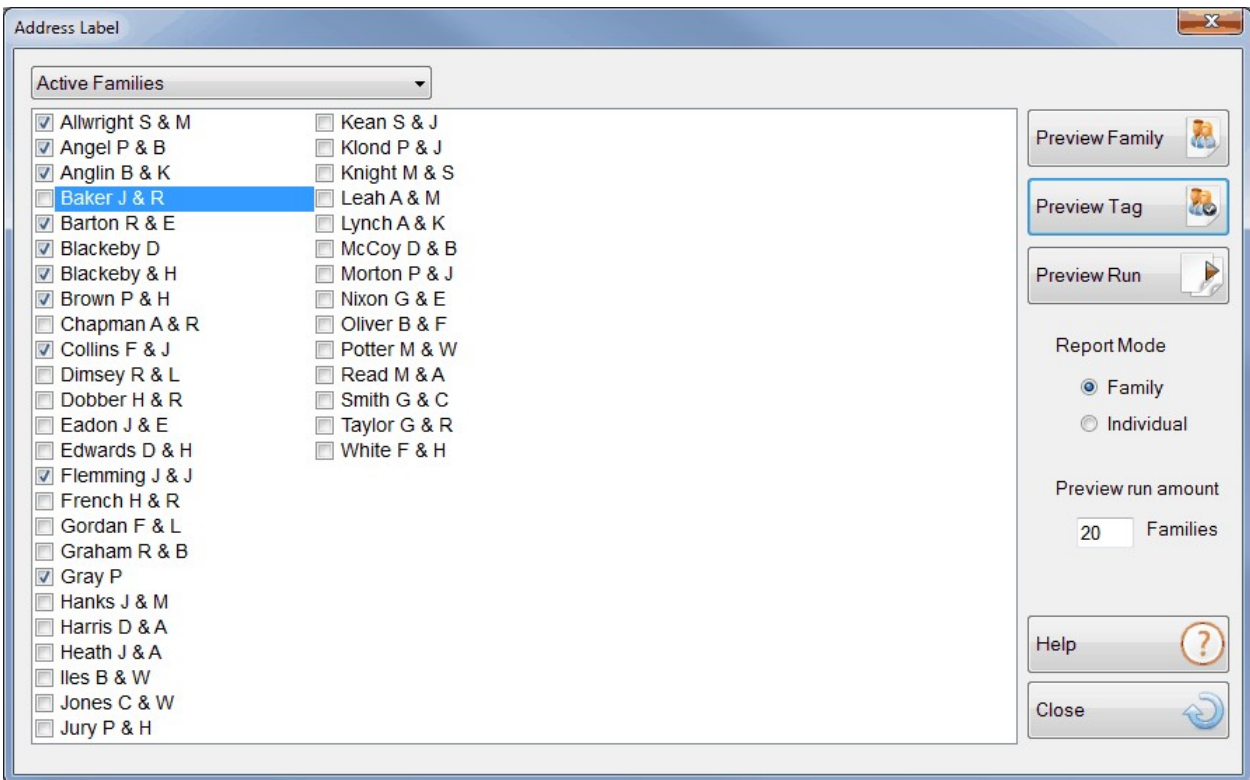
Preview



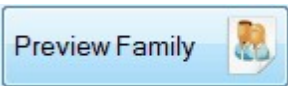
Use the Preview Option to test run the label setup. The quickest way to test run is to enter a number of families in the Preview Run Amount box and press Preview Run. This will select that number of families to output to the report viewer for printing.



Click on each area of the screen below to learn more about the Preview Mailing Label feature.

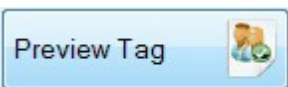


Preview Family



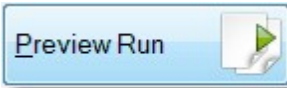
Press the Preview Family button to preview a single Family. The family that will be displayed on the report will be the highlighted family.

Preview Tag



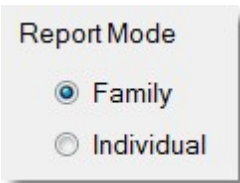
Press the Preview Tag button to preview all families that have been Tagged in this window.

Preview Run



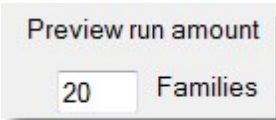
Use this button (Recommended) to preview a run of families as entered in the [Preview Run Amount](#) amount. The default is 20 families.

Report Mode



Choose to run the label report as an Individual Address Label, or as a Family address label.

Preview Run Amount



Enter the number of families that you want to preview.

Mapping

This mapping feature allows you to setup a grid map designed to closely resemble a printed Street Directory. This needs to be setup to a standard that is popular in your area, and one that people are familiar with. If this feature is fully utilised with data in the family file, you can gather and produce demographic reports on people's location, and distance from landmarks etc.



Click on each part of this setup area below to learn more.

Mapping...

Click on a cell to add/edit information

Landmark	Map	Ref
Church	25	A2
Manse	25	B5
School	25	H6

Grid labels

Alpha Top / Numeric Side
 Numeric Side / Alpha Top

Map grid width

0.4 Km Wide

Map layout

Top scale of map 'A' to K

Is the letter 'I' & 'O' bypassed?

Yes No

Side scale of map '1' to 12

Landmarks

This is a list of landmarks that are of interest. Pastoral Care can report on the distance from landmarks to family homes etc. Enter as many landmarks that are of interest for reporting on.

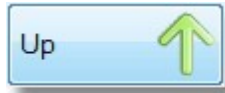
Click on a cell to add/edit information

Landmark	Map	Ref
Church	25	A2
Manse	25	B5
School	25	H6

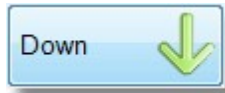
Control Buttons



Press this to create a new entry to fill in a new landmark.



Move the selected landmark up in the list.



Move the selected landmark down in the list.



Remove the selected landmark.

Grid Labels

Grid labels

Alpha Top / Numeric Side

Numeric Side / Alpha Top

Choose which side of your street directory has Alpha and which side has Numeric grid labels.

Map Grid Width

Map grid width

Km Wide

Enter the distance in KM across a single map grid square. This will be used when estimating distance on reports.

Map Layout

Map layout

Top scale of map 'A' to

Is the letter 'I' & 'O' bypassed?

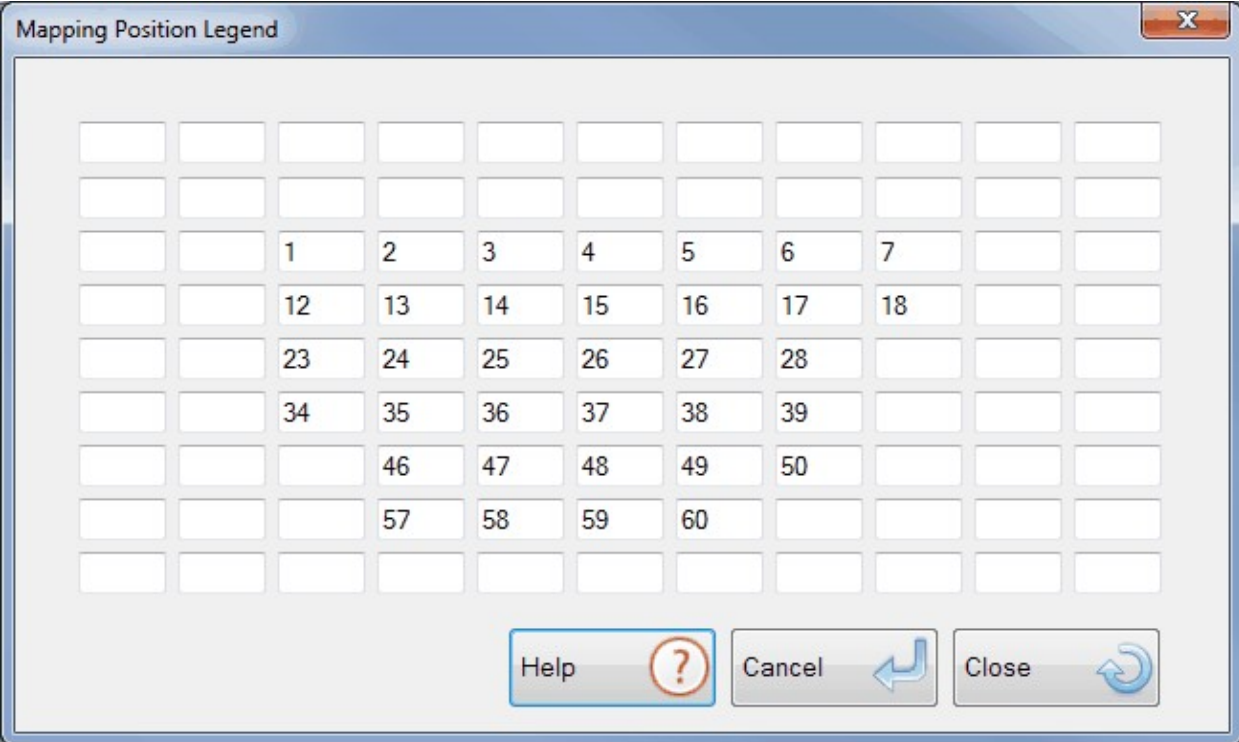
Yes No

Side scale of map '1' to

Set the amount of letters used on the Alpha Scale, whether or not the Letter I and O are left off the maps, and the size of the grid on the Numeric Scale.

Map Config

Fill in the grid with the map numbers that represent the area that your church covers, in terms of where people live. You can find this information usually towards the front of your street directory, and is often referred to as the Master Map.



The dialog box titled "Mapping Position Legend" features a 10x10 grid. The grid contains the following numbers in a 10x10 layout:

		1	2	3	4	5	6	7	
		12	13	14	15	16	17	18	
		23	24	25	26	27	28		
		34	35	36	37	38	39		
			46	47	48	49	50		
			57	58	59	60			

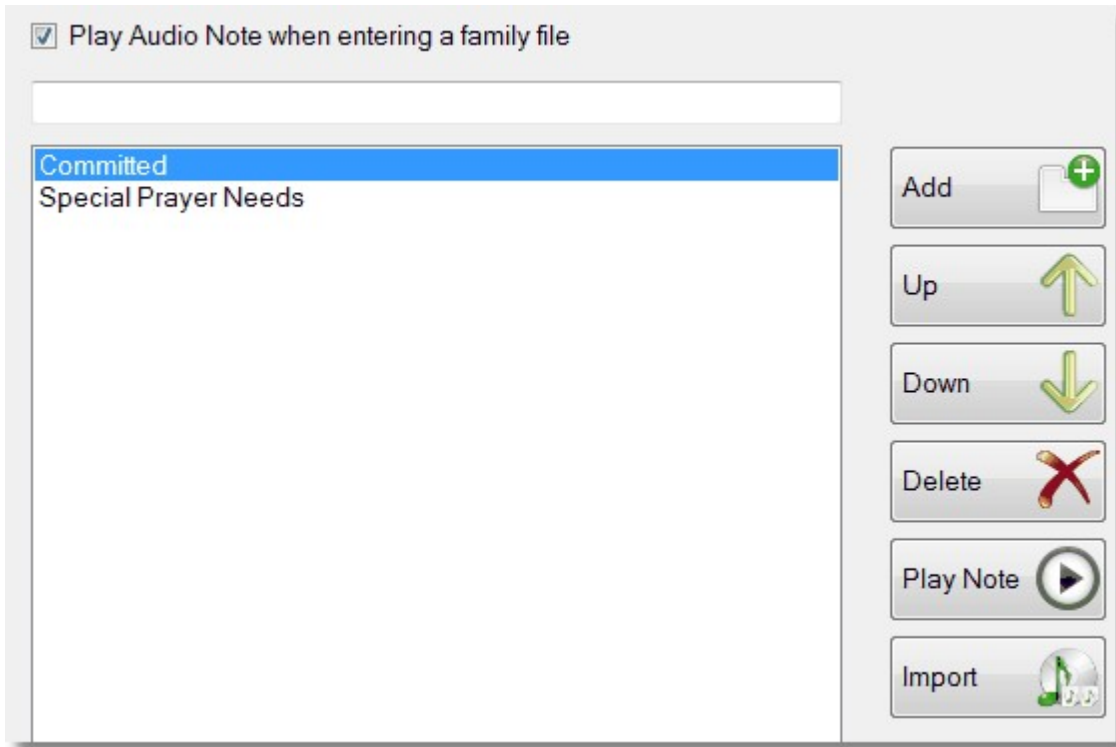
At the bottom of the dialog box are three buttons: "Help" with a question mark icon, "Cancel" with a left-pointing arrow icon, and "Close" with a circular refresh icon.

Audio

You can record your own Audio Prompts that can be played back when you enter a family file that has that note attached to them.



Click on each part of the Audio Setup window below to learn more.



Play Audio Option

Play Audio Note when entering a family file

Tick this option to enable playing of selected notes in the family file when you open a family file.

See also the [Audio](#) section in the Family File.

Add Audio Note



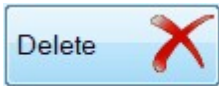
Press the Add button will open the [Record](#) screen. This allows you to record an audio note for use in the Family File. If you already have some recorded (or existing from earlier versions of Pastoral Care) you can use the [Import](#) option to import them into this version of Pastoral Care.

Sort



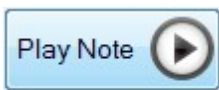
Use the Sort Buttons to sort the list of Audio Prompts.

Delete



Delete the selected Audio Note

Play Note



Press this to play the selected Audio Note.

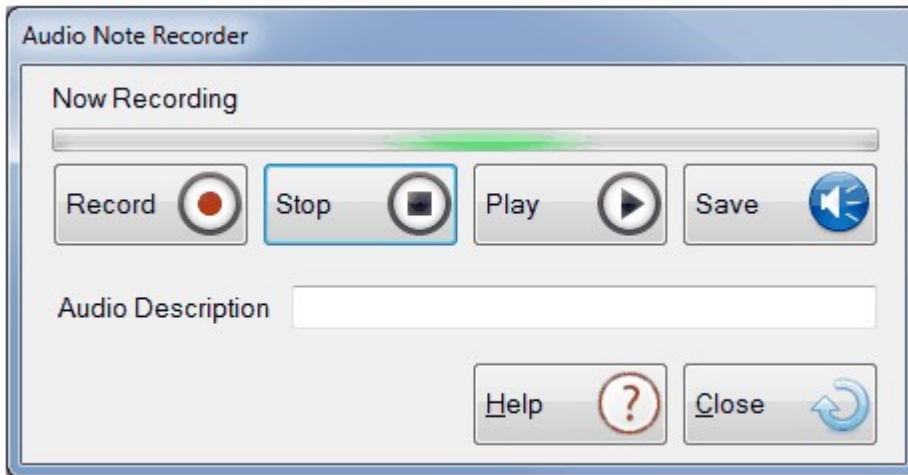
Record



Press this to start Recording an Audio Note. The following screen opens up giving you the ability to record.



Click on each area to find out more about this feature.



Audio Description



Enter a description to describe the recorded note. This is the title that people will see when selecting an Audio Note for use.

Record



Press this to start recording your audio note.

Stop



Press this to stop your recording.

Play



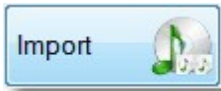
Play back the recording you have just made.

Save



Press this button to Save the current recording with the Note Description entered.

Import



Press this to browse to a previously recorded note. You can browse the Audio folder of your previous version of Pastoral Care if you want to import the existing audio notes or other notes you have already created.

Setup - Family File

The family file tab includes setup areas for all of the people or Family related information. When you choose Family File from the Main Menu / Setup tab, the following areas are available for editing:

Setup Area	Description	Example
Status	A status is used to define many different things about a person. Use a status to define things like Skills and Tasks.	<i>Elder, Deacon, Lay Preacher, Pianist, Guitarist, Lawn Mowing Team, Catering</i>
Individual Groups	Our suggestion is to use Groups where you are defining a group of people that actually meet together for a common purpose. See also Individual Groups for more information on this setup area.	<i>Outreach Team, Youth Group, Sunday School, Leadership Team, Cricket Club</i>
Ministry	Try NOT to put ministries into groups. Keep all your ministry definitions in one location. Ministries are just that, whatever you determine to be a ministry in Gods Kingdom in your corner of the world.	<i>Prayer, Healing, Worship Leading, Cooking, Song Leading, Preaching, Musician, Car Park Attendant etc</i>
Medical	Define topics of Medical Interest. These are particularly important for children in your care so that you can be aware of medical and dietary issues with your children in programs	<i>Allergies, Illnesses, Handicaps, Physical Ailments, Regular Medications, Insurance Details, Medicare Number etc</i>
Relationships	Setup definitions for relationships that you want to track in your church database. This is useful for having for example 2 parents in different files because they are divorced, and tracking the relationship between the 2 family files	<i>Divorced, Natural Father, Step Father, Grandparent, Grandchild etc</i>
Individual Dates	An Individual Date is an event that a person by themselves participates in. These can be Spiritual or Practical.	<i>Born Again, Confirmed, Baptised, Membership, First Communion, Death, Promoted to Glory, Holy Spirit, Spirit Filled</i>
Flexi Fields	A Flexi Field is a field that you define the name of the field, and you can also create lookup lists to allow people to select information to be saved against that flexi-field	<i>Ideal for storing information that Pastoral Care does not already store. For example Blood Group,</i>
Family	A Family Group is a group that by definition, the	<i>Language groups, Congregational Groups</i>

Groups entire family participates in. These are rare, however they are useful for controlling an entire family with one selection.

Family Dates A FamilyDate is a date that by definition, the entire family participates in. These are rare, however they are useful for controlling an entire family with one selection. *Date Joined Church, Date Left Church etc*

Title Title is designed for the prefix title given to people's names. *Mr, Mrs, Dr etc*

Occupation Define a list of occupations that people can be tagged as having. *Builder, Electrician, Dentist etc*

Suburb Define the list of Suburbs that people live in that are in your area.


State / Country Setup State and Country Names for posting to if you have people outside of your home country that you want to mail to.

Setting Up Family File Items

See Also [Setup - Family File](#) for full details on what each area of the Family File Setups can be used for.

Adding Items to the Family File Setup Tables

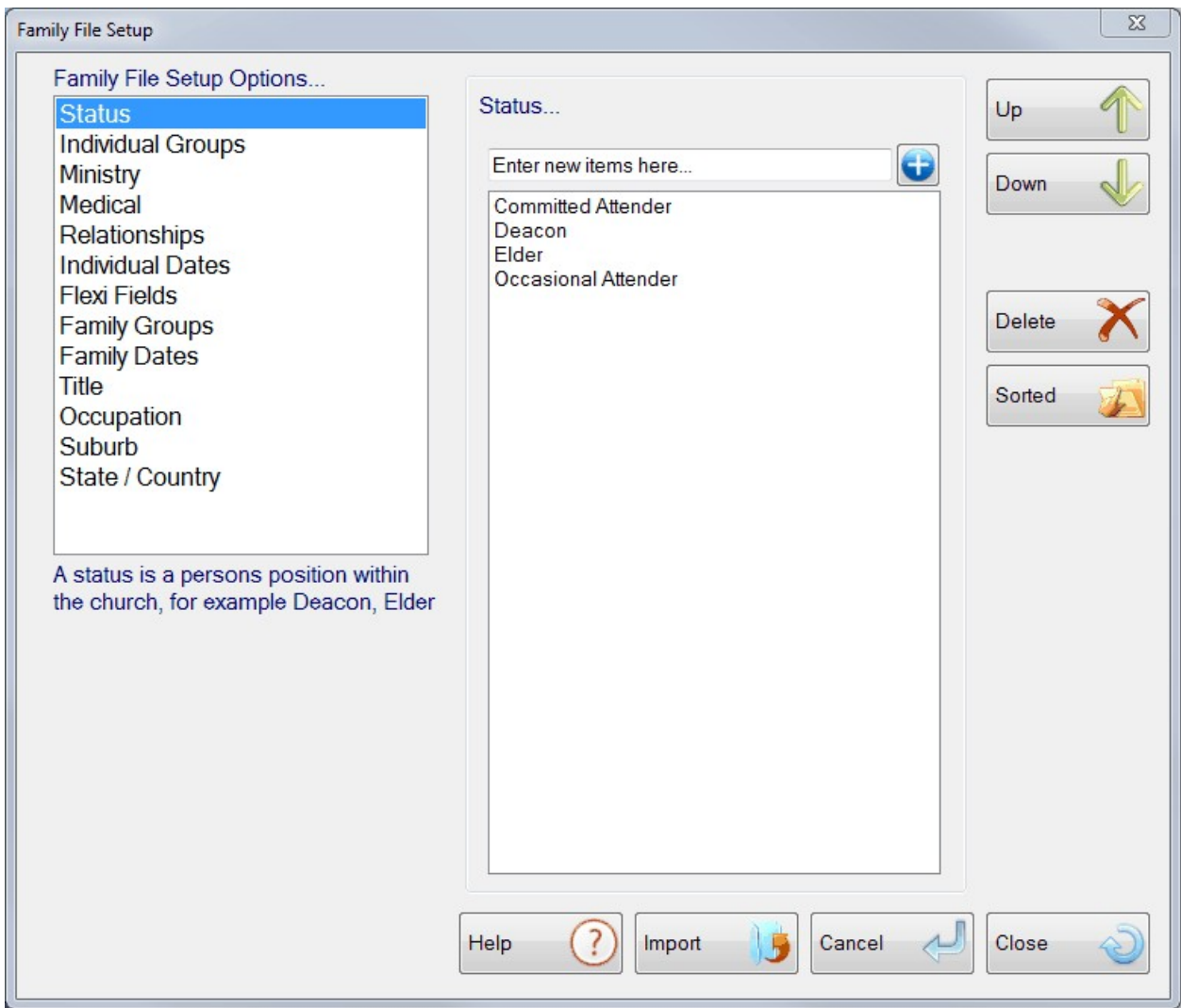
To add an item to a Family File Setup area, simply select the area of interest from the list of Options, type in a new

item and press the blue + button. 

See also [Individual Groups](#) for further information on Groups in Pastoral Care.



Click on each area of the screen below for more details.



Setup Options

The Setup Options list lists all areas in the Family File that can be added to, modified or deleted with this setup area . See [Setup - Family File](#) for more complete descriptions of each area and what they can be used for.

Select the Setup Area that you want to work with.



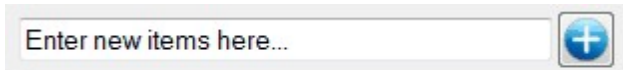
Current Items


This is a list of current items in the selected [Setup Options](#) area. An example of Status is shown below...




Committed Attender
Deacon
Elder
Occasional Attender

Enter New Item



Enter new items here... 

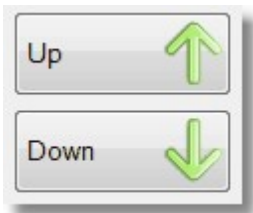
Enter a new item for selected setup area, and either press the Enter key on your keyboard, or press the blue +

button.  If you have already selected an existing item in a list, you can edit it by changing the spelling etc and pressing the blue + button again.

Rename Warning

If you rename a setup area, all people participating in the "old" setup name will now be participating in the new setup name. This is fine if the name of group changes, but it's members remain the same, but not so fine if you completely change the function of what you are naming!

Order



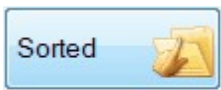
Use the arrow buttons to manually sort the selected item into a different position in your list.

Delete



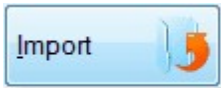
Delete the selected setup item. This does not remove people from your database, rather it removes the selected setup area from people!

Sort



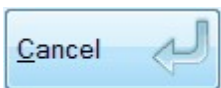
Press this button to sort the current list into Alphabetical Order

Import



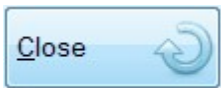
Press this to allow you to import settings from another church database.

Cancel



Press this if you have changed your mind on an edit. Cancel will close you out of this area without saving changes.

Close

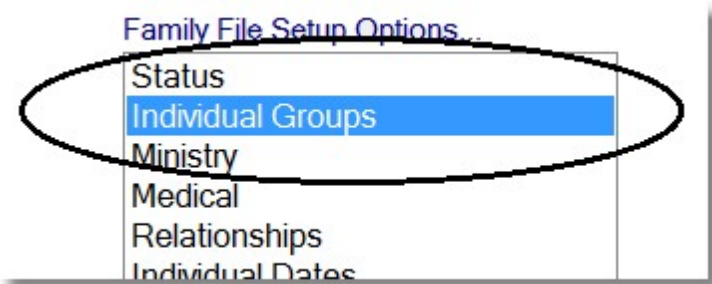


Press this to save and exit this setup area.

Individual Groups

Individual Groups have a few extra features that other setup areas do not have.

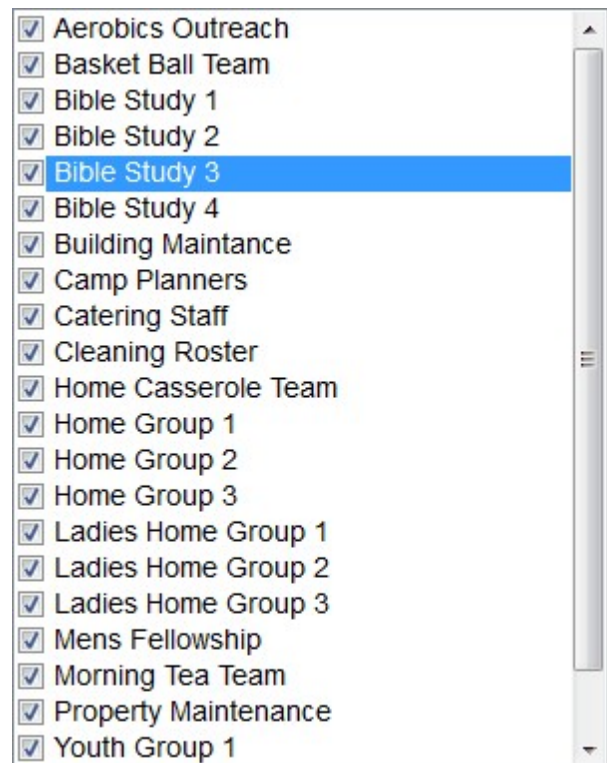
When you select the Individual Groups item from the [Setup - Family File](#) Area you have the addition of a Tick Box in the list of Individual Groups, as well as a Group Details Button.



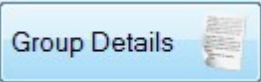
Select Groups

You can see the sample list of Individual Groups below. Notice the tick box. If you untick a group, that group is made inactive. It is not removed from Pastoral Care, however it is hidden from reporting on.

This is ideal for groups that might come and go over time, but you do not want to totally remove them.

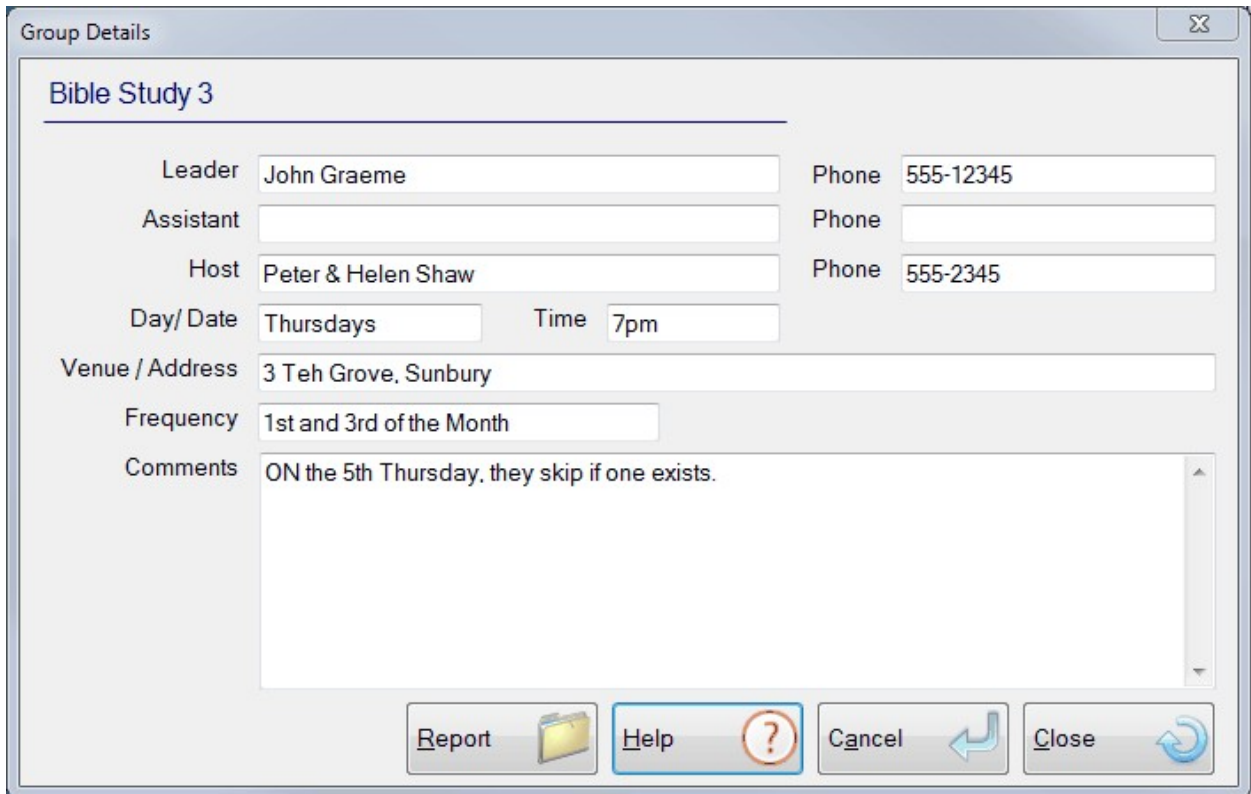
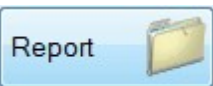


Group Details



Press the Group Details button to let you fill in details about where the selected Individual Group meets etc.

The following window lets you fill in all relevant information on the groups meeting requirements.

A screenshot of a "Group Details" dialog box. The title bar says "Group Details" and has a close button. The main content area is titled "Bible Study 3" and contains several input fields: "Leader" (John Graeme), "Assistant" (empty), "Host" (Peter & Helen Shaw), "Day/Date" (Thursdays), "Time" (7pm), "Venue / Address" (3 Teh Grove, Sunbury), "Frequency" (1st and 3rd of the Month), and "Comments" (ON the 5th Thursday, they skip if one exists.). At the bottom, there are four buttons: "Report" (with a folder icon), "Help" (with a question mark icon), "Cancel" (with a left arrow icon), and "Close" (with a circular arrow icon).

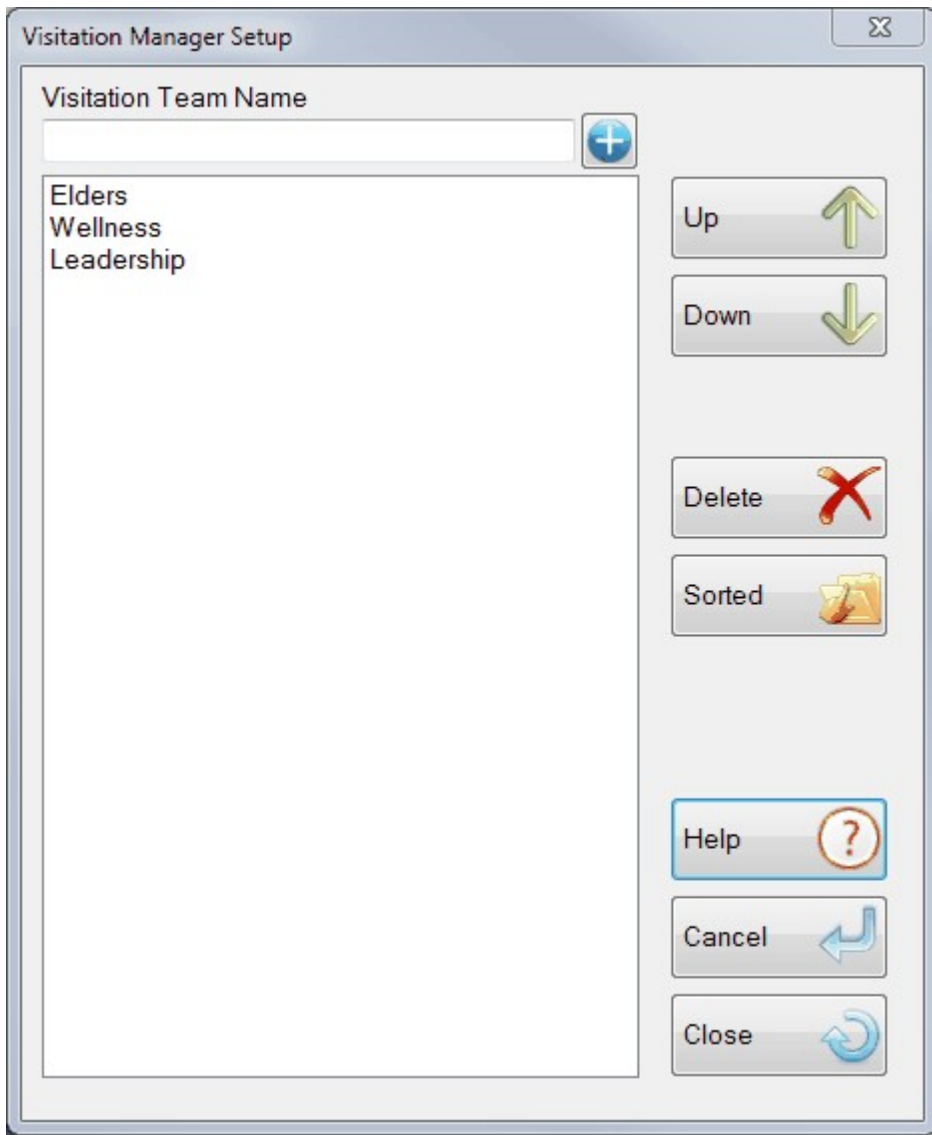
Press the Report button to get a report on the information shown in this area, as well as a list of all current people attending this group.

Setup Visitation

Pastoral Care lets you create Visitation Teams and assign people in the [Visitation Management](#) area to these teams. If you are a small church, and have only a few people doing visitation (or even just small enough for only the Pastor to be doing the visitation) then just create one Visitation Team.



Click on each area below to learn more...



Enter New Item



Enter a new Visitation Team and either press the Enter key on your keyboard, or press the blue + button. 

If you have already selected an existing team, you can edit it by changing the spelling etc and pressing the blue + button again.

Current Items

This is a list of current Visitation Teams. To rename a team or delete it, you must select one from this list first.

Elders
Wellness
Leadership

Order

Up



Down



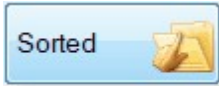
Use the arrow buttons to manually sort the selected item into a different position in your list.

Delete



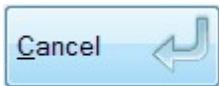
Delete the selected Visitation Team. Note, other visitation data from the [Visitation Management](#) will be lost if you delete a team. Do this only if you are totally changing your Visitation structure, and you do not wish to keep historical team visitation information.

Sort



Press this button to sort the current list into Alphabetical Order

Cancel



Press this if you have changed your mind on an edit. Cancel will close you out of this area without saving changes.

Close



Press this to save and exit this setup area.

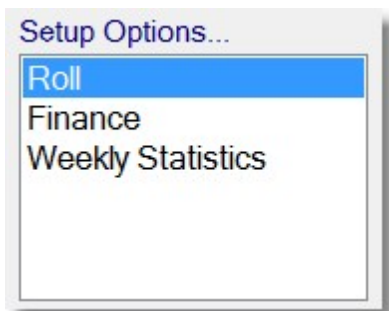
Setup Roll - Finance - Weekly Statistics

This setup area allows you to setup the Roll Projects, Finance Projects and Weekly Projects. If you are considering using both Roll and Weekly, then please consider naming the setup items for events similar or the same so that reporting has a more consistent feel to it. Also consider the setup / naming of events in the Roster area if you are using or intending to use Rosters.

When you enter this setup area, there are 3 menu list items you can select from.



Click on each one below for full details on each area.



Roll

The Roll area is the part of Pastoral Care that lets you record the names of people attending or not attending selected events. This is a name by name roll that is both very detailed in reporting, and can be difficult to data collect for, depending on how you collect data and how large your church is.

To Roll or Not to Roll, that is the question!

For some churches, taking a Roll (name by name ticking off on a list etc) is a normal part of what you do. It is part of the church culture. If you do this already, then the Roll Area is for you. If you don't do this already, then you need to decide if you want to use this feature or not. Taking a Roll and not using the information for any purpose is an absolute waste of resources. If you are already doing this, consider stopping! However, if you do take the Roll, you can use the reporting capabilities and filtering in Pastoral Care to find all Active Members in your church who's attendance is dropping below a selected percentage, and send them a letter inviting them to a church luncheon to encourage them.

Data Entry vs Data Collection

The entering of a Roll into Pastoral Care can be done in minutes with deadly accuracy. The gathering of the information however can take allot more effort. Consider printing out Check Lists for people to keep on a clip board for ticking off, or even using a Bar Code report that you can mark names off of people you notice. Then scanning in the bar codes that are there is quick and accurate.

Reverse Data Collection

Instead of trying to note down all people who were at church, try just noticing the people who were not there, and assuming everyone else was there. This is really fast for data entry, and collection. Not 100% accurate, but for really large churches, this can be a solution to a large data collection problem.

Kids

Working With Children legislation at the very least, as well as reasonable duty of care, demands that you know WHO is attending your Children's programs. Create Name Tags for regulars that have bar codes on them and have the children throw their name tag in a bin at the end of the event / meeting. There is your data collection. Name Tag in Bucket = Attended that event!

[See Setting Up Roll Projects](#) for more information on this.

Setting Up Roll Projects

Shown below is the Roll Setup area with a Roll Project of "Sunday Services" selected.



Click on each area to learn more.

Roll...

Roll Project

Sunday Services +

Sunday Services

Home Groups

Event 1

Morning am1

Event 2

Morning am2

Event 3

Evening

Event 4

Event 5

Event 6

Event 7

Up

Down

Delete

Help

Cancel

Close

Include as full attendance in analysis if...

Absent 1

Absent

Absent 2

Sick

Absent 3


Holiday


Absent 4

Other

Add Project

Roll Project

Enter Project Name here... 

Enter A Roll Project name and press ENTER to add it to the list of projects, or press the Blue + button. 

Some examples of Roll Projects could be:

Project	Suggest Event Names
• Sunday Services	<i>AM1, AM2, Evening</i>
• Home Groups	<i>The Smiths, The Shaws, Pastor John</i>
• Scout Meetings / Youth Meetings	<i>1st Ivanhoe, 2nd Ivanhoe, etc</i>
• Bible Studies	<i>The Smiths, The Shaws, Pastor John</i>
• Business Meetings	<i>1st Qtr, 2nd Qtr, 3rd Qtr, AGM</i>

Project Name

Select a Project Name after [Adding a Project](#) to allow you to edit the Event and Absent titles for that project.

Sunday Services
Home Groups

Events

For each Project you have setup, you can have up to 7 Events. If you need more than 7 events for 1 project, for example home groups, you will need to create 2 or more projects to achieve this.

Event 1	<input type="text" value="Morning am1"/>
Event 2	<input type="text" value="Morning am2"/>
Event 3	<input type="text" value="Evening"/>
Event 4	<input type="text"/>
Event 5	<input type="text"/>
Event 6	<input type="text"/>
Event 7	<input type="text"/>

Absent

There are 4 Absent Categories for each project. A typical setup is shown below.

Include as full analysis

If one of these is ticked, then for that Absent Category, in Roll reports with analysis, the people marked as absent with that category will be considered as attending any of the events in the project. This logic is assumed if ticked because one might consider that if a family / person was away on Holidays, they would have normally been at church, and that reason of Holidays is not necessarily a strong reason for follow up because they missed a service.

	Include as full attendance in analysis if...
Absent 1	
<input type="text" value="Absent"/>	<input type="checkbox"/>
Absent 2	
<input type="text" value="Sick"/>	<input type="checkbox"/>
Absent 3	
<input type="text" value="Holiday"/>	<input checked="" type="checkbox"/>
Absent 4	
<input type="text" value="Other"/>	<input type="checkbox"/>

Sort



Use these buttons to sort the Roll Project list

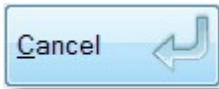
Delete



Press the delete button to delete the selected Roll Project.

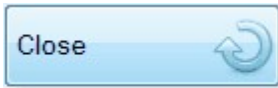
Warning, deleting a Roll Project will also delete all Roll Records already saved against that Roll Project. No data recovery or undo is possible if you accidentally delete a Roll Project.

Cancel



Press this to cancel any changes to the Roll Projects setup area.

Close



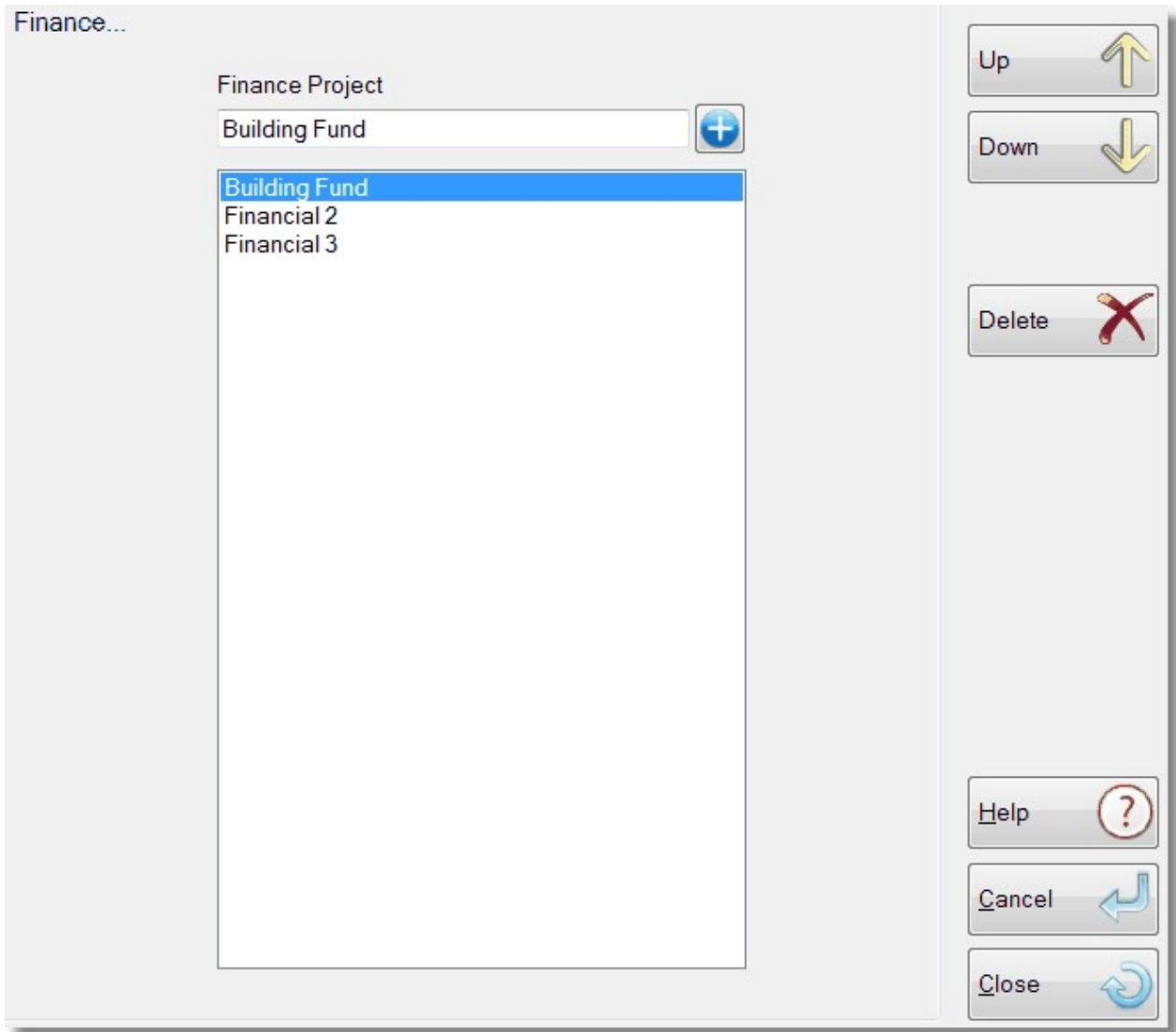
Press this button to save any edit's or additions etc to the Roll Project area and close the setup area.

Finance

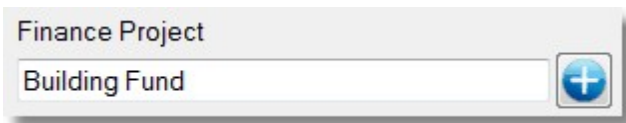
Setup up Financial Projects for donations to be accepted against. See also [Financial Records](#) for information on how Financial Projects are used in Pastoral Care.




Click on each area of the Finance Project setup window below to learn more.



Add Project



Enter A Financial Project name and press ENTER to add it to the list of projects, or press the Blue + button. 

Some examples of Financial Projects:

Project

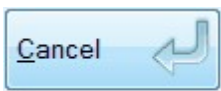
- Building Program
- Missions Fund
- Development Fund
- Church Plant
- Etc

Project Name

This is the list of entered Financial Project Names. You can only delete, or sort these items, there are no additional properties associated with these setup items.



Cancel



Press this to cancel any changes to the Financial Projects setup area.

Delete



Press the delete button to delete the selected Financial Project.

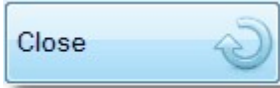
Warning, deleting a Financial Project will also delete all Financial Records already saved against that Project. No data recovery or undo is possible if you accidentally delete a Project.

Sort



Use these buttons to sort the Financial Project list

Close



Press this button to save any edit's or additions etc to the Financial Project area and close the setup area.

Weekly Statistics

A Weekly Statistics Project is designed for recording numbers of people attending / participating in weekly programs, as well as recording income / offerings etc for those events. This does not require noticing who was at what event, rather just counting how many, and how much!

Really useful trending reports can be gathered from using the Weekly Statistics area, so use this setup area to define just what you want to record. See [Weekly Statistics](#) for information on how to use this feature.



Click on each part of this window to learn more.

Weekly Statistics...

Weekly Project
Sunday main

Financial

- AM Offering
- S/S Offering
- Building Fund
- Community Chest
- O/S Missions
- Local Missions

Attendance

- Morning AM1
- Morning AM2
- Evening
- Home Group 1
- Home Group 2
- Home Group 3
- Baptised
- Born Again
- Membership

Up

Down

Delete

Help

Cancel

Close

Add Project

Enter A Weekly Project name and press ENTER to add it to the list of projects, or press the Blue + button.



Some examples of Weekly Projects could be:


Project	Suggest Event Names
• Sunday Services	<i>AM1, AM2, Evening</i>
• Home Groups	<i>The Smiths, The Shaws, Pastor John</i>
• Scout Meetings / Youth Meetings	<i>1st Ivanhoe, 2nd Ivanhoe, etc</i>
• Bible Studies	<i>The Smiths, The Shaws, Pastor John</i>
• Business Meetings	<i>1st Qtr, 2nd Qtr, 3rd Qtr, AGM</i>

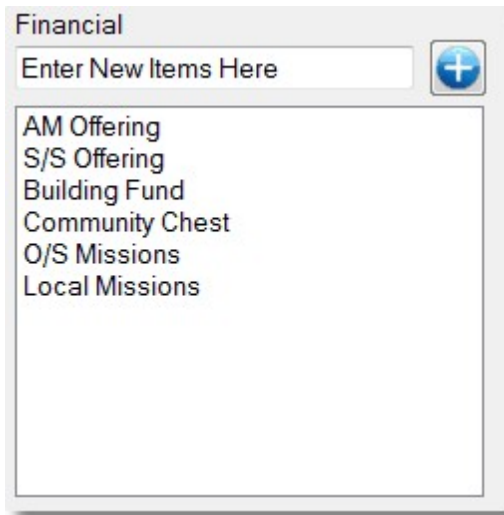
Project Name

Select a Project Name after [Adding a Project](#) to allow you to edit the Financial and Attendance categories for that project.

Financial


For each Weekly Statistics Project you have setup, you can have any number of Financial Categories to record income / donations against.

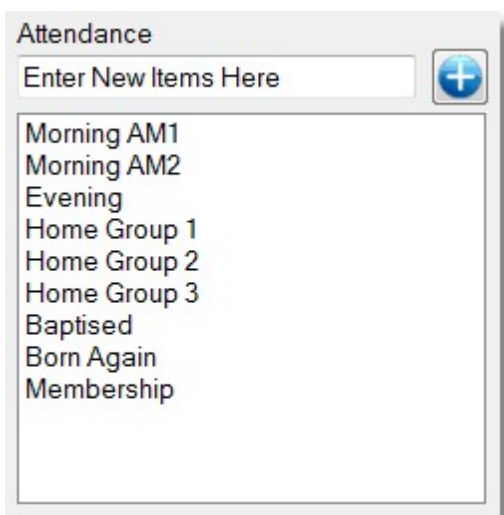
Simply type in a new item and press Enter or the Blue + button () to add it to the list of Financial items for the selected Weekly Statistics Project.



Attendance

For each Weekly Statistics Project you have setup, you can have any number of Attendance Categories to record attendances against.

Simply type in a new item and press Enter or the Blue + () button to add it to the list of Attendance items for the selected Weekly Statistics Project.



Notice that some items in this list are also milestones that occur in people's lives, as well as attendance at events. If you wish to keep a count of how many baptisms you have on each Sunday Service, set it up as an Attendance Category for tracking against each event recorded.

Sort



Use these buttons to sort any of the selected setup lists in the Weekly Statistics area.

Delete



Press the delete button to delete the selected Item. This could be an Attendance or Financial Category, or an entire Weekly Statistics Project.

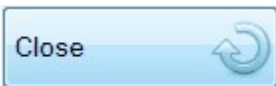
Warning, deleting a Weekly Statistics Project will also delete all Records already saved against that Project. No data recovery or undo is possible if you accidentally delete a Weekly Statistics Project. This is also true for any of the Attendance or Financial setup items in this area as well.

Cancel



Press this to cancel any changes to the Weekly Statistics setup area.

Close



Press this button to save any edit's or additions etc to the Weekly Statistics area and close the setup area.

Setup Rosters

The Pastoral Care Roster feature lets you manage the somewhat difficult task of Rostering people within your church. Once you have mastered Rosters, you will no longer be reaching for the Aspirin every few months, but rather be able to sit back and relax with a nice hot drink while you let our Roster program take all the stress for you!

If you are new to rosters, please read the [Introduction](#) section on rosters before diving in and having a go! After reading the Introduction, you can learn all about the Roster Setup Option by reading the [Roster Setup Window](#) area.

Click on each area below to learn more about rosters.

[Introduction](#), [Roster Setup Window](#), [Events](#), [Duties](#), [Duty Properties](#)

Introduction

IMPORTANT INFORMATION

If you are not using rosters, and you are thinking about it, please read this section of the manual right through before diving in. Having a complete understanding of the setup philosophy of Rosters is important if you wish to avoid headaches down the track!

Introduction

The Setup Rosters Area allows you to define all of the setups for using the Roster feature of Pastoral Care. If someone in your church is doing a manual roster, ask them how many hours they spend on a roster. We are confident the Roster program can cut the time it takes to create and manage a roster by up to 80%. Not only will you save time, but the reliability of the roster will increase, and the ease of distribution of your roster will increase dramatically.

The Roster Setup Area is interested in two main high level settings, Events and Duties.

Events

An Event is what you probably call a Service, or a Meeting. Here are some examples of events that have been used in Pastoral Care.

- Sunday Worship Services
- Easter Special Services
- Christmas Services
- Sunday School Programs
- Youth Meetings
- Scouts, Boys Brigade, Girls Brigade etc

Duties

A Duty is simply a task that is performed at one or more Events. It is important to note that each duty you create in Pastoral Care, can be used in every Roster Event, or only 1 or 2 roster events. That is, each event can have its OWN unique combination of duties. ALSO, each Event and Duty combination can have its own properties set. For example, lets say you have 2 morning worship services, and the duty of Singer is used at both services. However, you only use 2 singers at the early service, and 4 singers at the mid morning service. This is easy to do in Pastoral Care, as each combination of Service with its selected duties has its own properties for how many people, and how often that duty is performed.

Roster Setup Window

If you are new to rosters, please check out the [Introduction](#) section before diving right in!



Click on each part of the Roster Setup area below to learn more about Rosters settings.

Roster Setup
✕

Roster Event

9:30am Traditional

11:00am Family

7:00pm Evening

Duties

Car Park

Door Duty

Overhead

Music Team

Piano

Worship Leader

Childrens Address

Offering

Speaker

Communion

Maximum Amounts within Duty

People

Teams

Duty Pattern for Auto Build

Every Date Entered

Frequency

Every

Starting From

Regular Pattern

1st 2nd 3rd

4th 5th

of Every Month

Up

Down

Delete

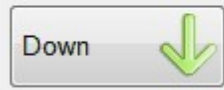
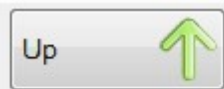
Help

Cancel

Close

Rosters are created by having an event, for example 'Sunday 9:30' Service, then by creating a duty, for example 'Door Duty'. Connect the events to the duty by selecting the event and ticking the duty to create a unique 'Event\Duty' combination in which you can set up the maximum amount of people, teams as well as the pattern for when the auto build builds the 'Event\Duty'.

Control Buttons

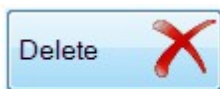


The Sort buttons will move an item in either the Event List or the Duty List. These should be sorted logically, rather than alphabetically in our opinion.

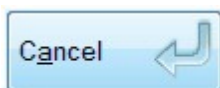
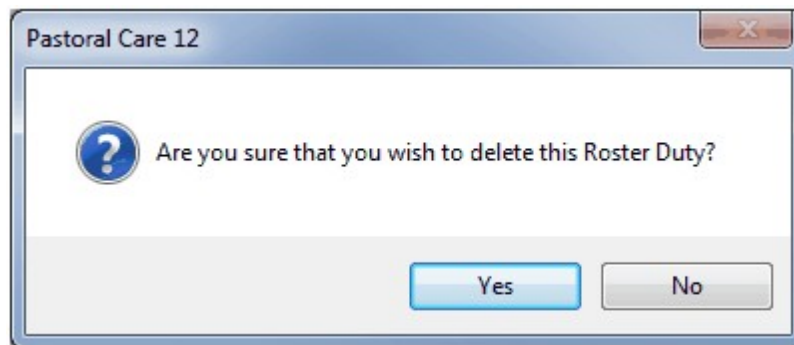
For example, event order should be your Sunday Services First, followed by the next most frequents events.

Duty Order should be a logical order based on groupings. For example, Preacher, Service / Worship Leader, Worship Team duties, Welcoming, Offering, Kitchen, Car Park etc.

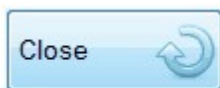
This is not about who's job is more important, it's about grouping duties (not people) into a logical unit that helps you see the big picture quickly.



The Delete button will delete any selected item. If a Duty is highlighted, then pressing delete will remove that duty entirely. It will NOT simply un-tick it. A delete is permanent and cannot be undone, however you will receive a warning before the delete is completed...



If you think you have made a mistake in this area, press Cancel to back out of the settings and not save your changes



Press Close to Save and Exit the Roster Settings area.

Events

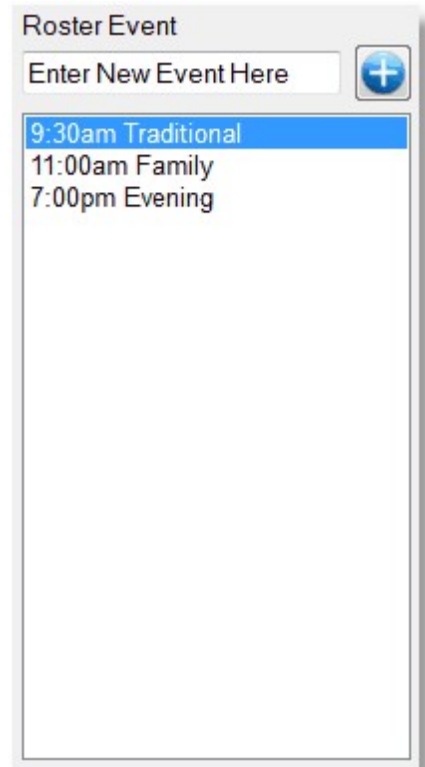
An Event is simply a meeting or gathering that you want to roster people on to do things at. You can also include the "less frequent" events like Good Friday, Christmas day etc. If you setup these events also, it makes rostering so much easier down the track.

Enter a New Event

Simply Type in a new event name and press the blue + button, or press ENTER on your keyboard.

Edit an Event

Simply select an event in the list, then you can edit information like attached Duties, Duty properties etc.



Duties

An Duty is simply a Task that is done at one or more events. You can enter all of the duties that you want under one event, and then tick / untick the duties that you need for each event, creating a unique Event/Duty combination.

Enter a New Duty

Simply Type in a new Duty name and press the blue + button, or press ENTER on your keyboard.

Edit a Duty

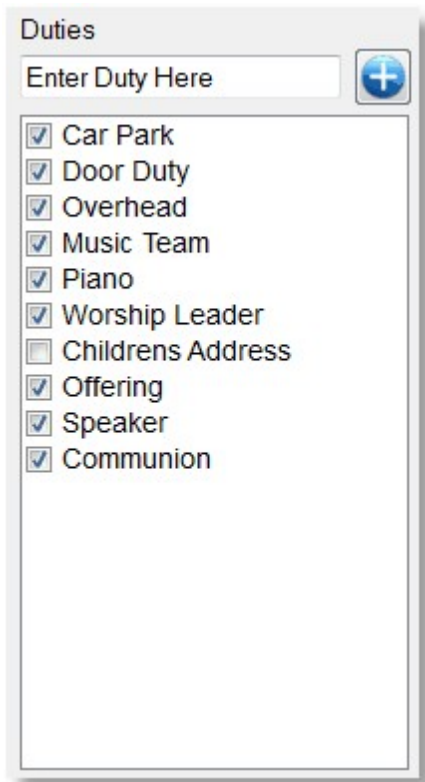
Select a Duty in the list by clicking on it's name, then you can edit information like Frequency, Number of people needed for that duty etc.

Ticking a Duty

A tick in the duty list shows that item is required for the SELECTED event. In the example right, you can see that for the selected event (the event is not shown in this picture) we are not having a Children's Address.

Naming a Duty

When naming a Duty, try and keep the name as short as possible. This will assist in fitting as much as you can onto the roster. Long Duty names take up alot of column space on a roster.



Duty Properties

Shown right is the properties section for a selected Event / Duty combination. It is important to note that each event and duty combination selected must have the settings below set to match your needs.

For example, you may have 3 services on a Sunday (2 morning and 1 evening service), and you only ever have communion at the 2nd morning service, and only on the 1st and 3rd Sunday. You can set this all up with the properties shown right.



Click on each area (right) for more information on the Event/Duty properties.

Maximum Amounts within Duty

People

Teams

Duty Pattern for Auto Build

Every Date Entered

Frequency

Every

Starting From

Regular Pattern

1st 2nd 3rd

4th 5th

of Every Month

Maximum Amounts

Maximum Amounts is all about How Many people you want on a specific Event/Duty combination. You can set the Maximum amount for individual People and for a Team. The minimum setting is 1 for each.

For example if you need 3 people for Car park duty at the 9:30 Traditional service, your settings will look like this...



Duty Pattern

The Duty Pattern settings are all about how often a particular duty occurs for each event.

See [Every Date Entered](#), [Frequency](#), [Regular Pattern](#) for information on each of the Duty Pattern options.

Note that the "how often" is unique for each Event/Duty combination and that settings are needed for each of these combinations. For example, at the 9:30 service, you may have communion twice a month, and the 11am Family service has communion twice a month but on alternate Sundays.

Shown below is the sample settings to achieve this.

9:30 AM Service Settings

Roster Event

- 9:30am Traditional
- 11:00am Family
- 7:00pm Evening

Duties

- Communion
- Car Park
- Door Duty
- Overhead
- Music Team
- Piano
- Worship Leader
- Childrens Address
- Offering
- Speaker

Maximum Amounts within Duty

People 1

Teams 1

Duty Pattern for Auto Build

Every Date Entered

Frequency

Every 2 weeks

Starting From 26/12/2012

Regular Pattern

1st 2nd 3rd

4th 5th

Sunday of Every Month

11 AM Family Settings

Roster Event

- 9:30am Traditional
- 11:00am Family
- 7:00pm Evening

Duties

- Communion
- Car Park
- Door Duty
- Overhead
- Music Team
- Piano
- Worship Leader
- Childrens Address
- Offering
- Speaker

Maximum Amounts within Duty

People 1

Teams 1

Duty Pattern for Auto Build

Every Date Entered

Frequency

Every 2 weeks

Starting From 26/12/2012

Regular Pattern

1st 2nd 3rd

4th 5th

Sunday of Every Month

Every Date Entered

The Every Date Entered option is the simplest and most common Duty Pattern to use. This is suitable for Duties that occur *all the time!*

Here are some possible examples of duties that you may have for every event...

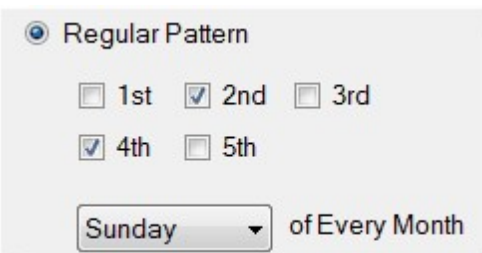
- Preacher
- Service Leader
- Welcoming
- Musicians

Frequency allows you to set a duty to occur every x number of weeks. You need to select the correct starting day/ date, and the interval will be every week. If you select a Sunday, and choose the interval to be 3 weeks, then starting from the selected date, on the 3 weeks from that day and every 3 weeks thereafter, that duty will be on the roster.



The screenshot shows a dialog box titled "Frequency" with a radio button selected. It contains two main fields: "Every" with a dropdown menu set to "3 weeks", and "Starting From" with a text input field containing "06/01/2013" and a calendar icon to its right.

The Regular pattern is great for duties that happen on a regular occurrence, but not every week! Simply select which days of the month that the duty occurs on, and select the Day of the month. The example below shows a duty set for the 2nd and 4th Sunday of every month.



The screenshot shows a dialog box titled "Regular Pattern" with a radio button selected. It features five checkboxes for "1st", "2nd", "3rd", "4th", and "5th", with "2nd" and "4th" checked. Below these is a dropdown menu set to "Sunday" followed by the text "of Every Month".

Setup CarePlus

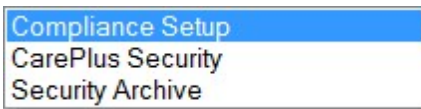
The Setup area for CarePlus allows you to define multiple Legislative Standards for use in your church. Most churches will only need to setup one standard for use, however if you want to be accountable to both State Based legislative requirements and perhaps denominational guidelines as well, you can setup these as separate Compliance Types.

See also [CarePlus](#) for full details on how to use this feature.

There are 3 setup areas in CarePlus settings. [Compliance Setup](#), [CarePlus Security](#) and [Security Archive](#).



Click on each area below to learn more.



Compliance Setup


The CarePlus setup area shown below is displayed with one Compliance Type already setup as a sample.



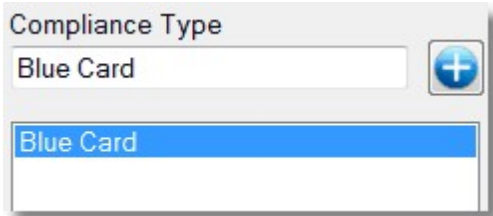
Click on each area to learn more about this area.

The screenshot displays the 'Compliance Type' setup window. On the left, a list shows 'Blue Card' as the selected compliance type. The main area is divided into tabs: 'Risk', 'Status', 'Reviews', 'Procedure', 'Event', 'Comment', and 'Incident'. The 'Risk' tab is active, showing a list of risk levels: 'Very High', 'High', 'Medium', and 'Low'. To the right of this list, a text box explains: 'Risk Rating is what's considered the risk level of a person, for example Very High, High, Medium, low'. On the far right, there are several control buttons: 'Up' (green arrow up), 'Down' (green arrow down), 'Delete' (red X), 'Help' (question mark), 'Cancel' (blue arrow left), and 'Close' (blue circular arrow).

Compliance Type

Add New Compliance types by typing in a new Compliance Type Title and pressing ENTER on your keyboard, or pressing the blue + button. 

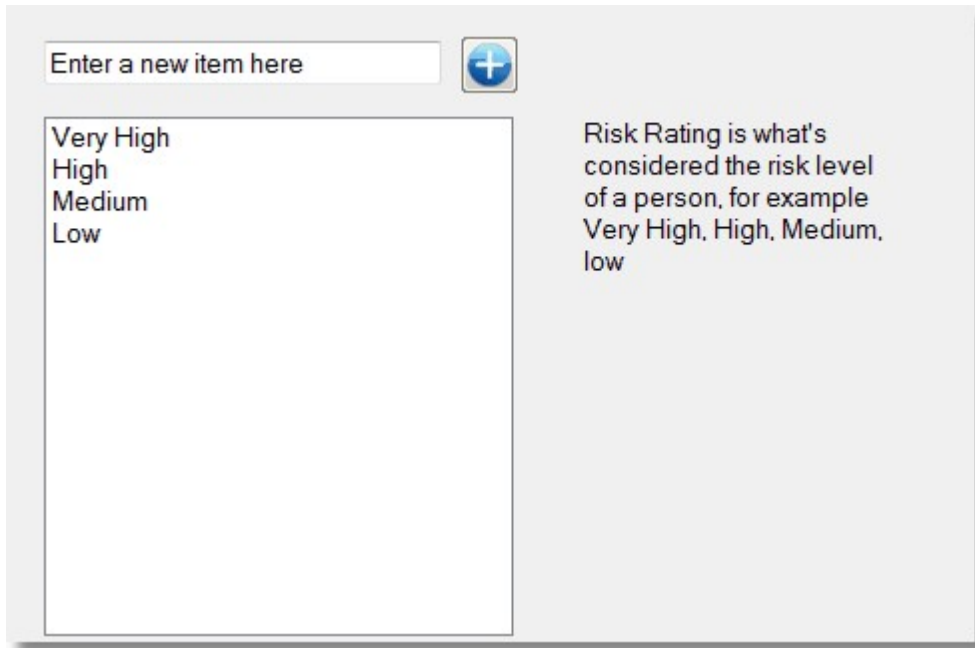
To add other items to that Compliance Type simply select it from the list (Blue Card is shown selected below) to allow you to add further information to the [Risk](#), [Status](#), [Reviews](#), [Procedure](#), [Event](#), [Comment](#) and [Incident](#) areas.



Risk

For the selected [Compliance Type](#), enter a list of Risk Ratings that you need to assign to people who are looking after your children.

Entering a new item and pressing Enter or the Blue button will add it to the list. Use some of the [Item Controls](#) on the right hand side of this area for sorting, and deleting items from this list.



Status

For the selected [Compliance Type](#), enter a list of Status's that you need to assign to people who are looking after your children.

A Status is a statement on the condition of the permit that a person is holding, such as current, or exempt etc.



Entering a new item and pressing Enter or the Blue button will add it to the list. Use some of the [Item Controls](#) on the right hand side of this area for sorting, and deleting items from this list.

Enter a new item here

- Current
- Exempt
- Expired
- Suspended

Status is the persons current holding status of a compliance, for example Current, Exempt, Expired, Suspended

Reviews

For the selected [Compliance Type](#), enter a list of Reviews that you need to assign to people who are looking after your children.

A Review is a statement of any review process that a person may be going through.



Entering a new item and pressing Enter or the Blue button will add it to the list. Use some of the [Item Controls](#) on the right hand side of this area for sorting, and deleting items from this list.

Enter a new item here

Applied For
Under Review
Inactive

Reviews is the current review taking place on a persons compliance, for example Applied for, Under Review, Inactive

Procedure

For the selected [Compliance Type](#), enter a list of Procedures that must be completed for a person to be compliant with the selected Compliance Type.

A Procedure can be ticked off as having occurred.



Entering a new item and pressing Enter or the Blue button will add it to the list. Use some of the [Item Controls](#) on the right hand side of this area for sorting, and deleting items from this list.

Enter a new item here

Certificate Received
Interview Completed
Police Check Done

Procedure is the process where you can tick against the procedure added here for a Yes / No status, for example Certificate Received, Interview Completed, Police check done

Event

For the selected [Compliance Type](#), enter a list of Events that must be tracked for a person to be compliant with the selected Compliance Type.

An Event has a date stored against it, and alarms can be set to warn users of Pastoral Care that events are coming up for review.



Entering a new item and pressing Enter or the Blue button will add it to the list. Use some of the [Item Controls](#) on the right hand side of this area for sorting, and deleting items from this list.

Enter a new item here

Expiry Date of Compliance

Events are dates that attached to a persons compliance for example, expiry date of compliance


Comment

For the selected [Compliance Type](#), enter a list of Comments for recording Free Hand text against for the selected Compliance Type.

The information stored here could be things like a Receipt Number, a Police Check Reference Number etc.



Entering a new item and pressing Enter or the Blue button will add it to the list. Use some of the [Item Controls](#) on the right hand side of this area for sorting, and deleting items from this list.

Enter a new item here 

Compliance Receipt Number

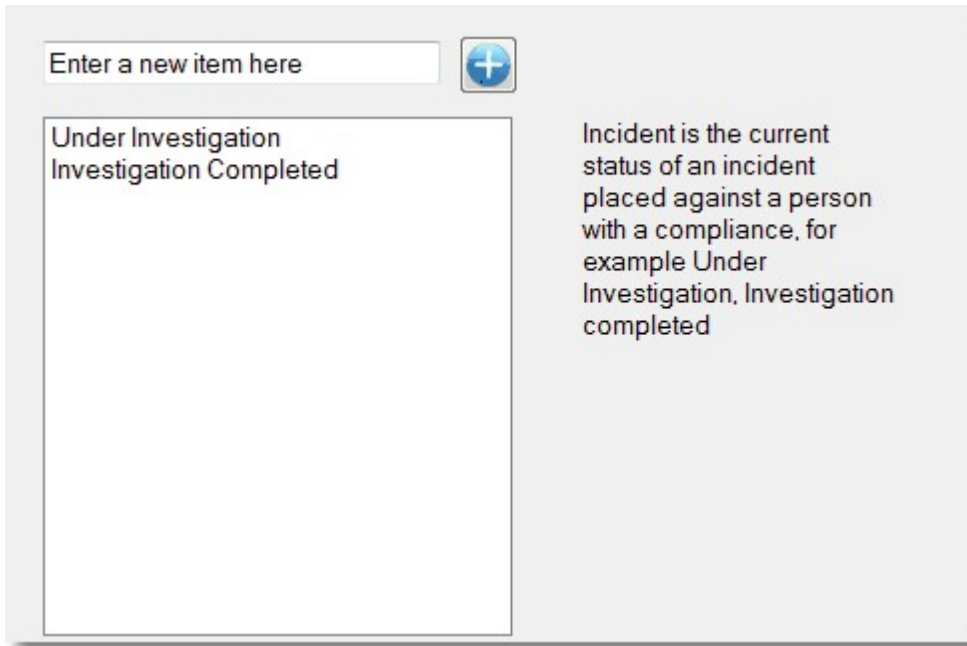
Comments are fields you can enter text against a persons compliance, for example compliance receipt number

Incident

For the selected [Compliance Type](#), enter a list of Incident Status's that apply to a person that is under investigation for an incident.



Entering a new item and pressing Enter or the Blue button will add it to the list. Use some of the [Item Controls](#) on the right hand side of this area for sorting, and deleting items from this list.



Item Controls

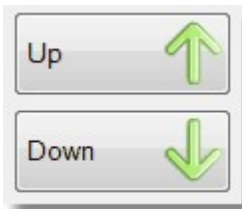
On the side of the CarePlus setup window is a number of common buttons that work in all of the areas.



They are shown below, click on each one for more information.



Sort



Use these buttons to sort any of the selected setup list items.

Delete



Press the delete button to delete the selected Item from a setup list.

Cancel



Press this to cancel any changes to the CarePlus settings area and exit this area.

Close



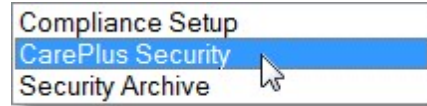
Press this to save all changes to the CarePlus settings area and exit.

CarePlus Security

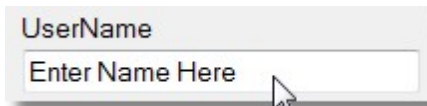
As well as using Pastoral Care general security (Usernames, Passwords and Access levels) the CarePlus area of Pastoral Care has it's own second tier of security. See also [Setup Security](#) for further information on setting up general security for Pastoral Care.


How to add a User and Password to CarePlus

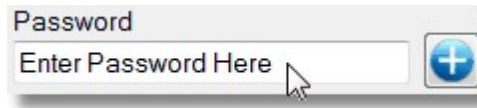
Step 1 Select CarePlus Security from the CarePlus Setup Area



Step 2 Enter a user name



Step 3  Enter a Password and press the Blue + Button



Step 4 Select your newly added Username from the list



Step 5 Set all areas of access needed for the selected username. (See Below)

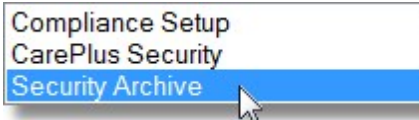
Access Levels

Notes Application Referee
 Incident Audit Reports
 Document Schedule

Authority levels

Authority to Delete CarePlus records
 Authority to Add/Edit Application, Referee & Incident records
 Authority to Delete Audit records
 Authority to Delete / Edit people within a family file

Security Archive



Select the Security Archive from the CarePlus setup area to see a list of which usernames have had access to the CarePlus program. The following window opens showing you who has used CarePlus and when they entered and exited that area.

UserName	Entry	Exit
Stephen	Sunday, 20 May 2007 09:20 AM	Sunday, 20 May 2007 09:20 AM
Stephen	Friday, 11 May 2007 12:00 PM	Friday, 11 May 2007 12:00 PM
Stephen	Friday, 16 March 2007 01:12 PM	Friday, 16 March 2007 01:16 PM

Setup Library Manager

The Library Manager setup area lets you setup 1 or more Libraries for loaning out assets.



Click on each part of this area shown below to learn more about setting up a Library.

Note, this sample screen is shown after selecting a Library Name for editing.

Library Setup

Library Name: Main Church

Asset Type: Book, DVD, Magazine


Borrowing Period: Days


Category Name: Family Life, Commentary, Counselling, Bible, Fiction, Theology, Children, Worship Music, Teaching

Maximum Assets a person can borrow: 5

Buttons: Up, Down, Delete, Help, Cancel, Close

Add Library

Library Name
Enter New Library Name Here 

Enter a new Library Name for use and press ENTER to save that name, or press the Blue + button to complete the entry. 

To add setup items to that Library Name, re-select it from the [Current Libraries](#) list and make the changes in [Add Asset Type](#) and [Add Category Names](#) areas.


Current Libraries

This is a list of Current Library Names that you have setup. These names are for distinctly different libraries. For example, you would not create a separate Library for Books, and another for DVD's and another for CD's etc. This is more for totally disparate areas of assets.

Main Church PA Equipment Office Equipment

Add Asset Type

After selecting a Library from the [Current Libraries](#) list, you can add the Asset Types and the default maximum borrowing period for each asset type. This is useful to assist in managing the expected return date. For example a book might have a borrow period of say 30 days, a DVD might be 5 days, and some PA equipment might be only 2 days.

To add an Asset Type, enter the type of asset, then the borrowing period and press the blue + button. 

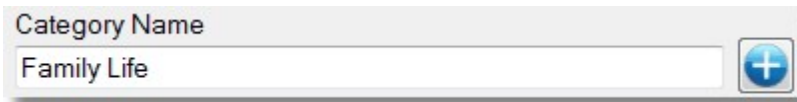
Asset Type	Borrowing Period	
Book	30	Days 

Current Asset Types

Book DVD Magazine

This is a list of the current asset types you have setup in the selected Library. Click on one to edit it.

Add Category Names

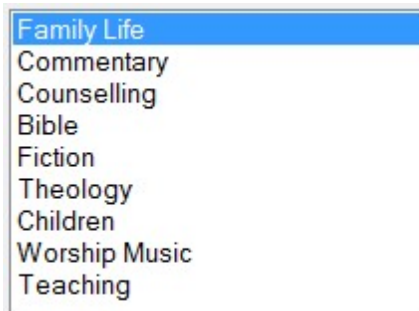


Enter a Category to sort your Assets into later. An Asset can participate in multiple Categories.

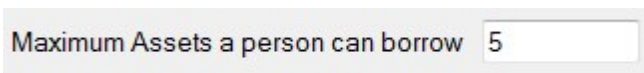
Simply enter a new Category Name and press ENTER or press the blue + button. 

Current Category Names

This is a list of the current Category Names that you have setup for the selected Library.



Maximum Assets



Enter a number to restrict the Maximum number of assets a single person can borrow for the selected Library.

Sort



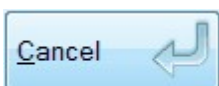
Use these buttons to sort any of the selected setup list items.

Delete



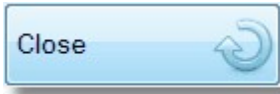
Press the delete button to delete the selected Item from a setup list.

Cancel



Press this to cancel any changes to the Library settings area and exit this area.

Close



Press this to save all changes to the Library settings area and exit.

Setup Security



Click the [The Security Setup Window](#) to see the Security window with further instructions.

Introduction to Security

Pastoral Care Security management allows you to set up individual logins to Pastoral Care that determines the level of access into the program. Each Username and Password that you create in Pastoral Care can have access to any combination of areas, allowing you to secure personal information to only your Ministry Team Leaders, Eldership and the like.

It is extremely important that you NEVER forget your password. If you forget your password (especially the password that lets you back into the security program) you will not be able to access Pastoral Care at all.

Creating Good Passwords

The secret to a good password is one that is easy to remember, but hard to guess. Do NOT issue passwords for people based on common sets, like Colours, (black, green, blue etc) Bible Characters (Joshua, Moses etc) or bible book names (Genesis, Exodus, Revelation etc). The problem with passwords like these is, once someone has been given one, it is far too easy for that person to think "what if I try XXX". For example, give a person a password of Genesis, and they might try exodus, and find that with exodus, they have greater access in the program.

The Security Interface

Pastoral Care Security when enabled can control the access to all areas for selected passwords. Pastoral Care used to use just a password for access, with a field for adding a list of names of people who have that password. We have now changed this to a more secure model. One Username / Password combination for each person you want to allow access to the program. You will need to remember your Username and Password to get into the program, or you can have Pastoral Care show you a list of Usernames to select from and then you will need to enter your password.

Security User Profiles

Another great reason to use Security, is that Pastoral Care can assign Reply SMS numbers and Reply Email Address information so that any messages you send can be responded directly back to you. If you do not fill in this information, then the main church contact information that is setup in the [Setup - Global](#) area will be used.

A Word About Security

This area is one of the most important setup areas in Pastoral Care. We STRONGLY suggest that you implement security here. Here are 4 sample passwords.

1. Russell
2. bx4heather
3. john316
4. peter1962

Which ones are good passwords and which ones are bad? Russell is too obvious, peter1962 is better, but if Peter was born in 1962, it is not so good. The other 2 are not too bad.

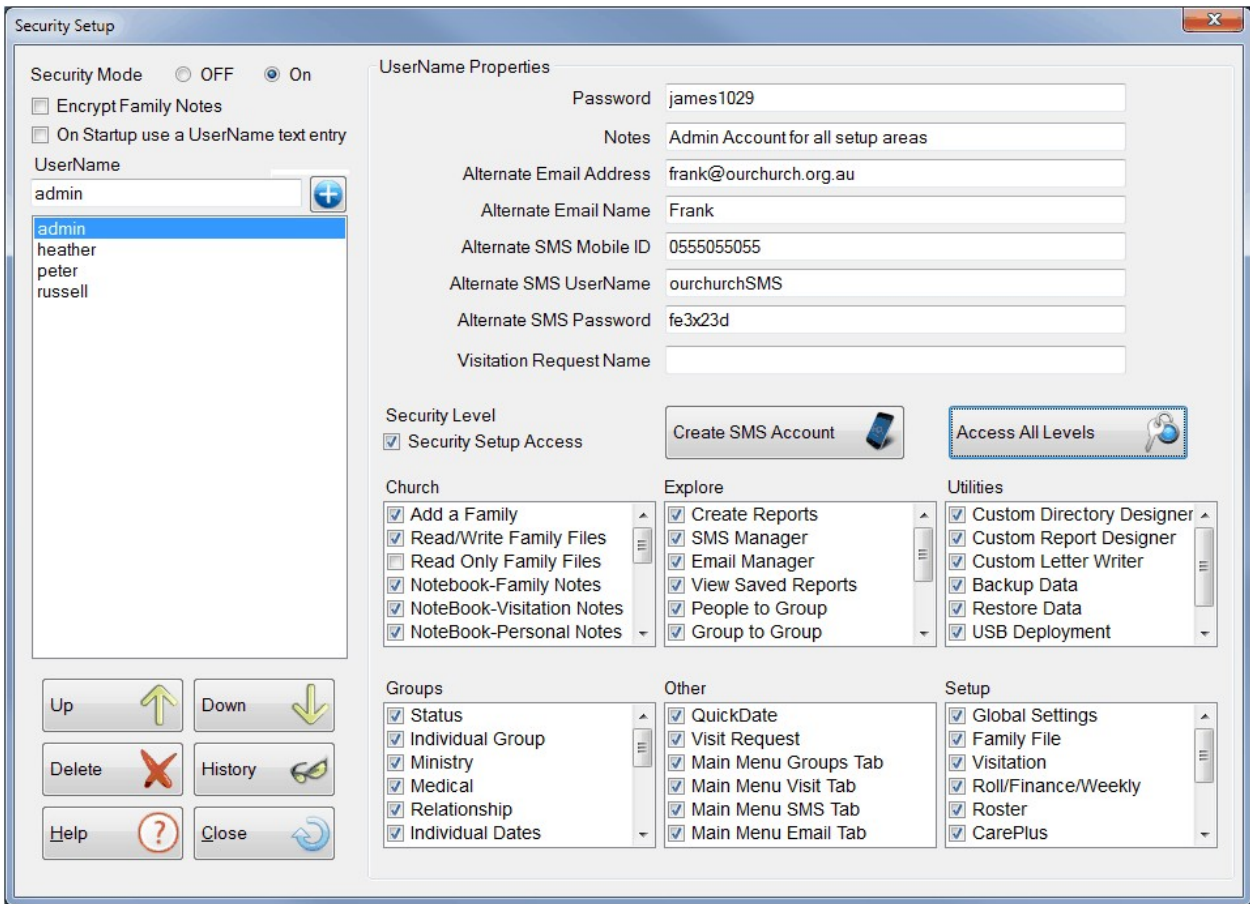
The WORST passwords are passwords that follow a pattern. Consider john316. This is ok, but if you have assigned say 6 passwords in the church, and used all bible references, this is no longer a strong password, as someone might guess it. I have seen passwords in a company once that were colours! Black, Green, Red, Blue, Purple and Gold. Guess which password gave access to all company records. You guessed correctly, Gold! Anyone with just an ounce of curiosity would try different names and colours, and soon work out all the logins for the business. Try and use passwords that are easy for individuals to remember, hard to guess and do not follow a pattern!

The Security Setup Window



Click on each area of the Security setup window shown below for more information. This is shown with the username "Admin" selected

Important Information: Please also see [Setup Security](#) for more information on getting the most from your Security Settings



Security Mode

Security Mode OFF On

Turn Pastoral Care security on and off. Note, a restart of Pastoral Care is needed before security changes are in effect.

Encrypt Options

Encrypt Family Notes

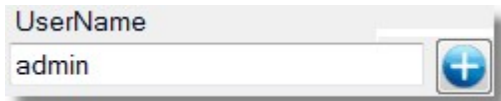
Tick this option if you are using the Notes feature in the family file editor for any personal information. Also make sure that security is turned on and you restrict access to Family Notes if you are entering personal information in that area.


Startup Options

On Startup use a UserName text entry

Tick this option for force a user to have to enter both a Username and a Password. With this option un-ticked, Pastoral Care will display a Username list on startup allowing a person to select their name from the list, and then type in their password.

Adding Usernames



Type in a new Username and press ENTER on your keyboard, or press the blue + button  to add a username to the list.

To add further information on that name such as Email Address, Password etc, re-select the name in the list and fill in the [Username Properties](#) information.

Current Usernames



To edit a Username, simply select it from the list and make any changes you need using the [Username Properties](#) area.

Username Properties

Fill in the personal Username Properties for each selected Username.

Password Enter a strong password for the selected user. Let your user help you select the password as this will assist them in remembering the password

Notes Enter an notes about the user that you need to.

Alternate Email Address Enter a Reply To email address to be used instead of the church contact email address. This is useful for situations where the user wants to email people from Pastoral Care and have any replies come back to them

Alternate Email Name Enter a Reply To name that will be displayed on emails as to who the email is from

Alternate SMS Mobile ID Enter a Reply To SMS number to be used instead of the church contact SMS Number. This is useful for situations where the user wants to SMS people from Pastoral Care and have any replies come back to them

Alternate SMS Username Enter an alternative SMS Global (www.msglobal.com.au) username for the selected user to be in control of their own SMS message costs.

Alternate SMS Password Enter the SMS Password supplied by SMS Global for use with the Alternate SMS account

Visitation Request Name Enter a name for Pastoral Care to use when recording that the logged in user has requested a Visitation Request.

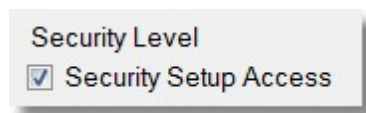
Security Access

Set the level of security access for each created Username / Password. Simply select the username, and tick the areas that you want to allow access to.

There are 6 different areas for setting the Security Level on. These are shown below...

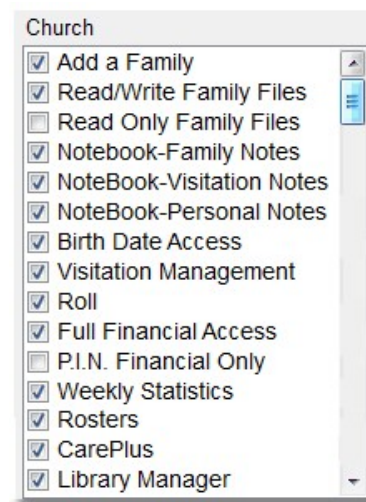
Security Level

Tick this option to allow the currently selected user to access the Security Setup area. This should not be set for many people, however do not forget the password for this section, without your login to this area you will not be able to make changes the security settings.



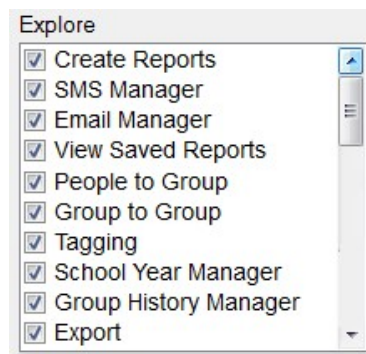
Church

The security options here relate primarily to all areas accessed via the Church Tab on the main menu. The list shown here have been expanded to show all options, in the program, you will need to use the scroll bar to see all the list at once.



Explore

The security options here relate primarily to all areas accessed via the Explore Tab on the main menu. The list shown here have been expanded to show all options, in the program, you will need to use the scroll bar to see all the list at once.



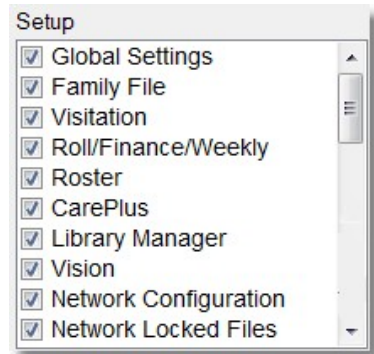
Utilities

The security options here relate primarily to all areas accessed via the Utilities Tab on the main menu. The list shown here have been expanded to show all options, in the program, you will need to use the scroll bar to see all the list at once.



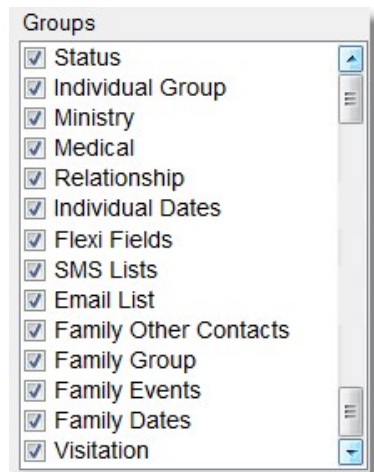
Setup

The security options here relate primarily to all areas accessed via the Setup Tab on the main menu. The list shown here have been expanded to show all options, in the program, you will need to use the scroll bar to see all the list at once.



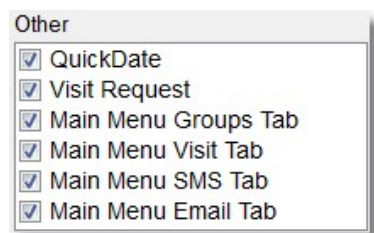
Groups

The security options here relate to all group information stored in Pastoral Care. This includes seeing the group information in the family file and in all reporting areas. To restrict a person from seeing all Medical Information in the database, do NOT tick Medical here for their username. The list shown here have been expanded to show all options, in the program, you will need to use the scroll bar to see all the list at once.

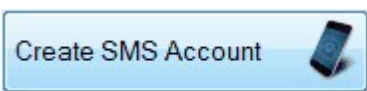


Other

The security options here relate to other areas not covered by the above 5 categories.



Create SMS Account



Press this button to take you to the SMS Global web page to get started on creating a new SMS account for sending text messages from Pastoral Care.

Access All Levels



Press this button to automatically set the selected username to access all areas of Pastoral Care.

Sort



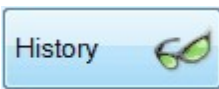
Use these buttons to sort the list of Usernames.

Delete



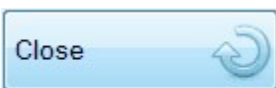
Delete the selected Username.

History



Press this to view a Historical Record of times the selected Username has accessed Pastoral Care.

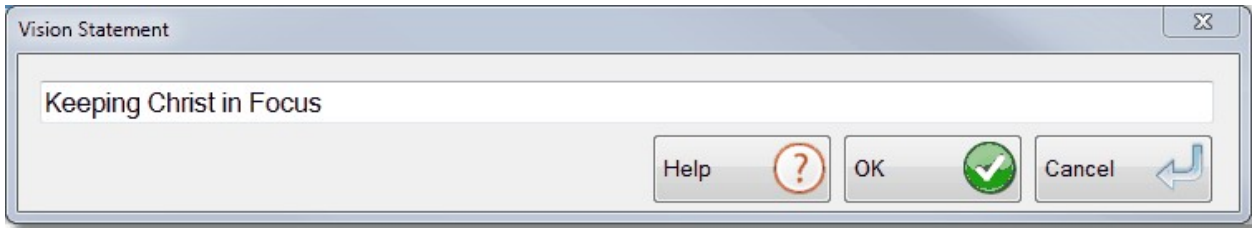
Close



Press this button to save any changes to Security and exit.

Setup Vision

Enter your church Vision Statement if you have one. This can be included on reports.



Multi User License

Read about our no nonsense Multi User License. Basically, you are allowed as a Non Profit Organisation, to load Pastoral Care on as many computers as you need to for no additional cost. Pastoral Care comes ready to setup on your network for no additional charges!

Setup Network Configuration

Networking is a complex area that requires a reasonable level of network experience. Before setting Pastoral Care up on a network, you should find someone in your church familiar with simple windows networks who can help you set it up.

Assuming that you are looking at the helps because you are having trouble with networking, the following subjects should be useful.

[Important Information](#)

[Network Prerequisites](#)

[Network Setup Step by Step](#)

[Features of Pastoral Care Networking](#)

[Unlocking Files](#)

Important Information

When running in a network mode, all of the computers running Pastoral Care access the *same information files*. This means that the version of Pastoral Care on each computer **MUST** be the same. If you ever download a patch from the Pastoral Care web site (www.pastoralcare.com.au) you must apply the patch to each and every computer on the network that is accessing Pastoral Care.

To check the version of Pastoral Care running on each computer, go to the Help - About menu item of Pastoral Care, and check the version numbers are all the same.

Updating a Computer with the latest Patch

See [Updating Pastoral Care](#) for information on updating to the latest patch update for your version.

Network Prerequisites

The Pastoral Care program will only work on a windows compliant network. It may be possible to run Pastoral Care from a linux server using a windows mapped drive to the linux server, however this has not been tested.

Pastoral Care requires the following conditions to work on a network.

- Pastoral Care 11 installed on every computer that is going to use the program
- A common shared drive that is visible to all computers with Pastoral Care installed on them.

If you cannot understand the terminology described here, then you need someone who does to help you set up Pastoral Care across the network.

Network Permissions

The shared area that the Pastoral Care data files are installed on must have **no network permission restrictions** on it. All users must have read, write, execute and delete permissions into the share that the Pastoral Care data files are stored in, including all sub directories.

Mapped Drive

Pastoral Care cannot connect to a share via a URL address such as \\servername\share. You must map a drive from the computer that you want to run the Pastoral Care program from to allow Pastoral Care to access the files across the network.

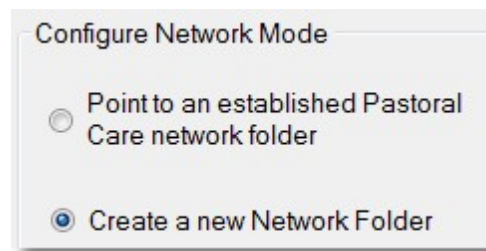
Network Setup Step by Step

This assumes that you have set up a network share and mapped the share to a drive on each computer. For sake of this explanation, the mapped network drive will be X:

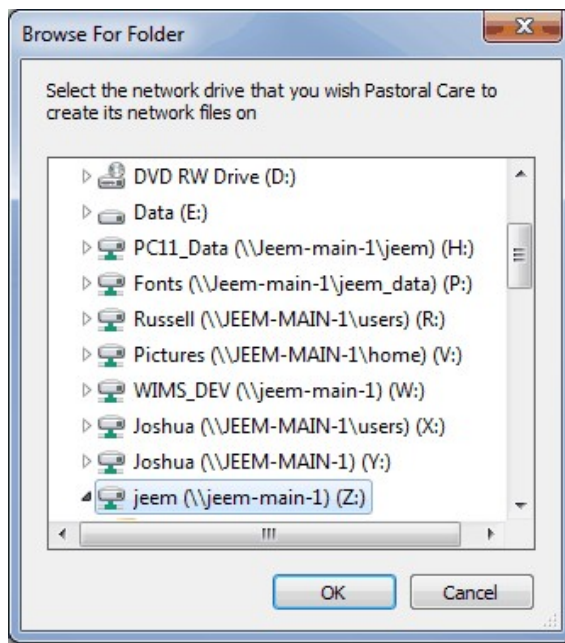
BEFORE SETTING UP A NETWORK, make sure you have a backup of your church data. This is required to restore to the network location after setting up the network.

Creating your network folders ready for data.

- | | |
|--------|--|
| Step 1 | From the main menu, Go to Setup - <i>Do this from the first computer to set up</i>
Networking |
| Step 2 | Choose Mode of operation to be
Network |
| Step 3 | Select Create a New Network Folder |



Step 4 From the windows browse location, choose your X: drive or your mapped network drive that you have previously created.



Step 5 Press OK to confirm. Pastoral Care will then create the folder structure and restart.

*Please note, **CREATING** the folder structure must only be done **ONCE** from one computer only.*

Step 6 Restore your backup to put all data on the network.

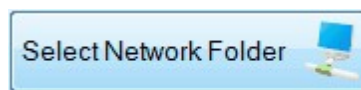
Adding Other Computers

Step 1 Make sure that you have the same mapped X: drive as the first computer you setup

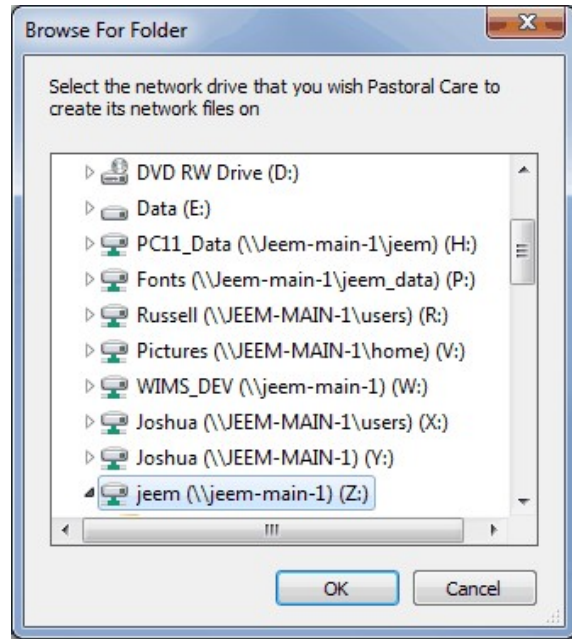
Step 2 Choose Mode of operation to be **Network**

Step 3 Choose Point to an established Pastoral Care Network Folder

Step 4 Press the Select Network Folder button



Step 5 Select the X: drive and press OK



Features of Pastoral Care Networking

Restrictions in network access

- Only 1 person can edit any single set up area at a time.
- Only one person at a time can edit any one family file.
- Only one person can edit a single Roll Project at a time. (Different roll projects can be edited at the same time).
- Only one person can edit a single Finance Project at a time. (Different finance projects can be edited at the same time).
- Only one person can edit a single Weekly Statistics Project at a time. (Different Weekly Statistics projects can be edited at the same time).
- Only one person can edit information in the Library Program at a time.
- Only one person can edit information in the Care Plus area at a time.
- Only one person can edit information in a single Roster project at a time.
- If someone is using any of the Pastoral Care Setup features, access into related areas will be restricted while setup editing is taking place.
- If someone is using a feature in Pastoral Care, access into its related setup area will be restricted.
- Pastoral Care is NOT designed to run on windows terminal services or other similar wide area networking protocols. It may be possible to do this, however support for this type of configuration is not available.

Networking Features

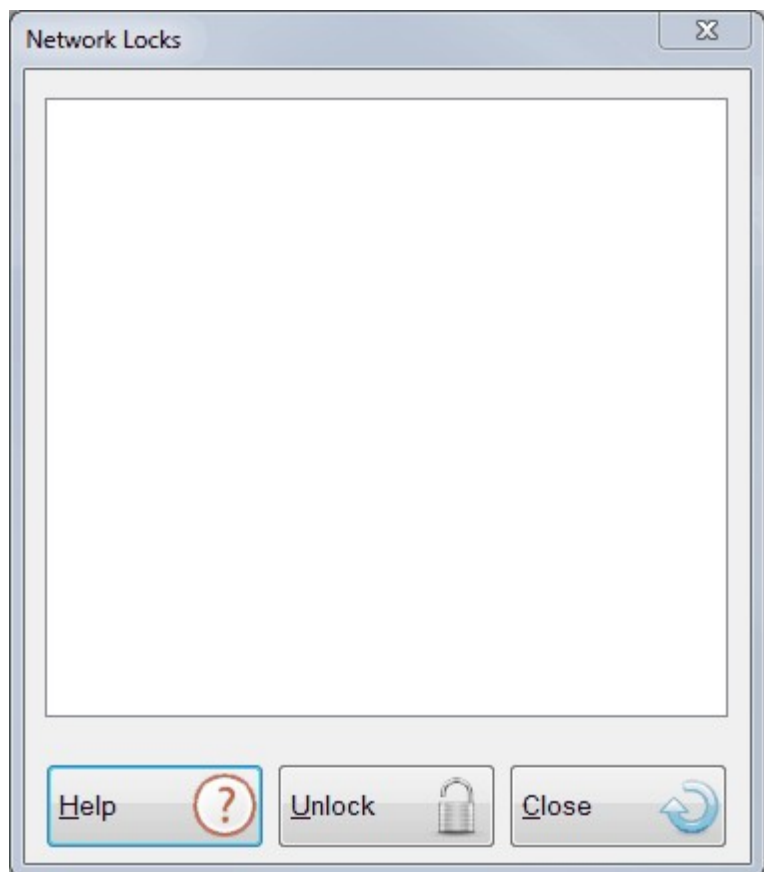
- Multiple users can edit multiple families simultaneously.
- Multiple users can produce any reports simultaneously.
- No limit on the number of Users. (Network and computer hardware dependent).
- All report areas and analysis areas can be accessed by multiple users simultaneously.

Unlocking Files

If there are any network file locks listed here, simply select the lock and press Unlock.

If you have trouble unlocking an area, have everyone exit Pastoral Care, then start Pastoral Care on one computer only and try the unlocking procedure again. If you get a lot of file locks occurring, then you might be experiencing some network drop out or connectivity issues. If this is the case, you may need to talk to your network administrator for assistance with network performance and reliability.

If you are still having trouble, you can try using the Pastoral Care Doctor program available from the Resources Icon installed with Pastoral Care.



Cloud Guest Configuration

Use the Cloud Guest Configuration area ONLY for setting up a computer that you want to connect to your church office via Cloud. Please see our web site www.pastoralcare.com.au for full details on how to implement Pastoral Care Cloud.

For a general overview of Pastoral Care Cloud, see [Introduction](#)

To see how to setup each Guest Computer for remote cloud access, see [Setting Up Guest Computers](#)

Introduction

The Pastoral Care Cloud feature allows you to take your Pastoral Care on the road with you and update your remove (guest) copy of Pastoral Care automatically when you are internet connected.

Things you will need for Cloud

A Drop Box Account

We use Dropbox (www.dropbox.com) for the sharing of information between computers using Pastoral Care. Simply create a free Drop Box account at www.dropbox.com and setup the drop box software on each computer that you want to have cloud access to Pastoral Care.

Internet Connectivity

You will naturally need an internet connection at the church office, and also on any computer connected to the Cloud. However, you do NOT NEED a permanent internet connection. In fact, you can work on your own, on your laptop, with no internet connection. Pastoral Care simply saves your changes on your laptop. Next time you are connected to the internet, Drop Box and the Pastoral Care Cloud gets everything sorted for you!

Pastoral Care Cloud License

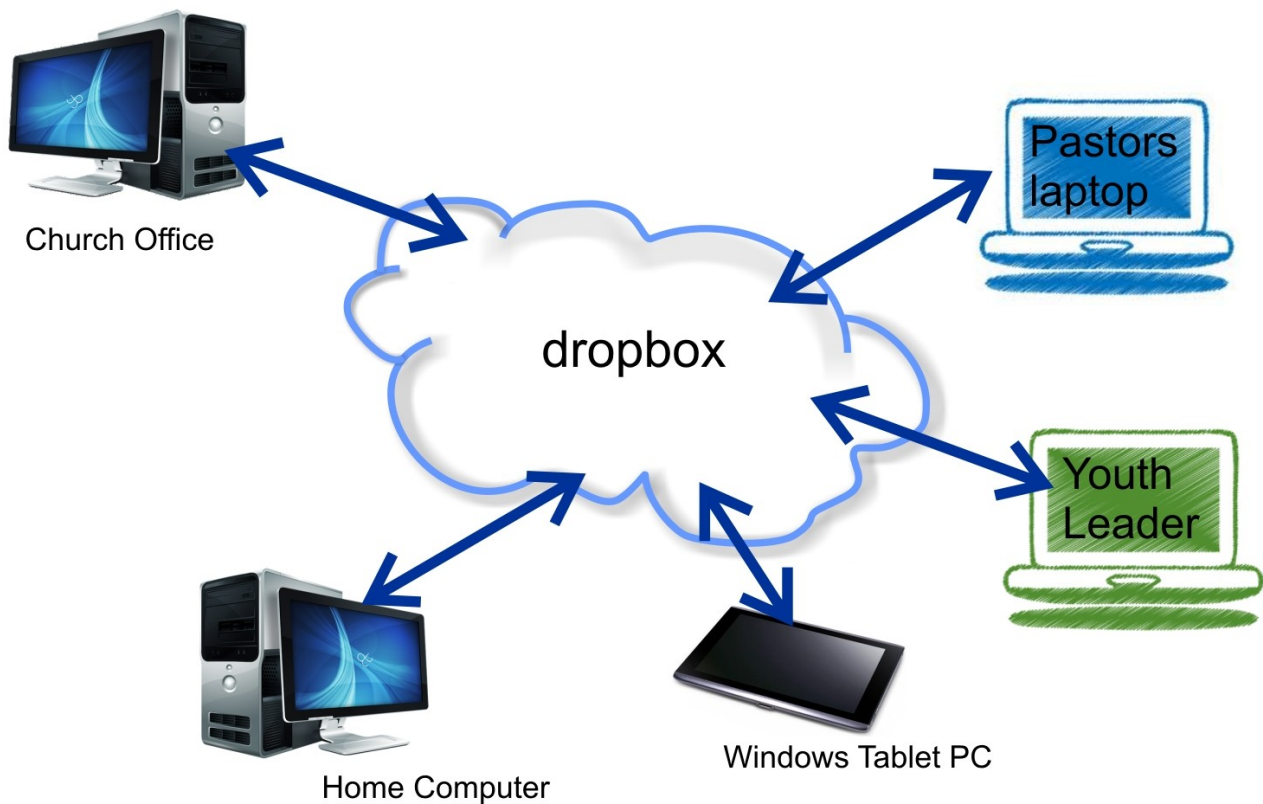
You will need to purchase a license for using the Cloud Service for Pastoral Care. The cost and type of licenses available can be found at : www.pastoralcare.com.au

Is the Cloud Safe?

Yes! The information stored on drop box, and shared between the computers via Dropbox is completely secure. We use our own security protocols that have been in use in Pastoral Care for many years now. It is almost impossible for people to intercept your data and be able to read it in any useful form, unless that are using Pastoral Care, have your login details for Pastoral Care, and your login details for drop box. They would also need access to a computer at your church to enable their own Cloud Service to their computer.

How does Cloud Work for Pastoral Care?

Shown below is a simple diagram of how computers can be used with Pastoral Care Cloud.



The Church Network with Cloud

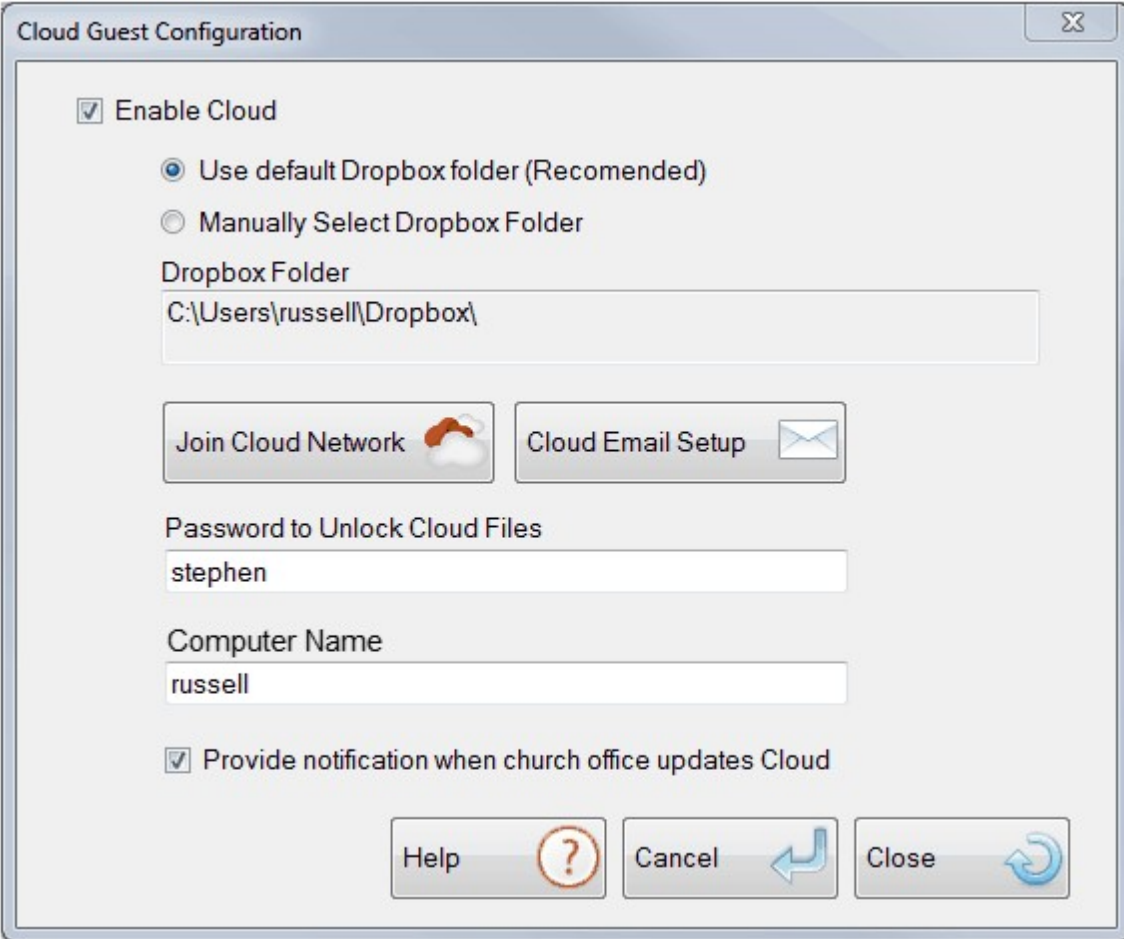
Naturally you can still install Pastoral Care 12 on your church network, in a free Multi User environment. You can use Pastoral Care on many computers at the church all connected either via Cable or Wireless LAN. In the above diagram, the Church Office could well be a server with 15 computers all networked together. On ONE of those computers you will need to have installed the Pastoral Care Cloud Host program. This is a separate program that manages your cloud connections to your Pastoral Care database.

Setting Up Guest Computers

The Setup for EACH guest computer is found from the main menu of Pastoral Care, go to the settings area, and press Cloud Guest Configuration.

The following setup window is displayed. You will need to download and install DropBox on each computer that you want to use Cloud on. We use DropBox as a central safe location for the encrypted data files needed to keep Pastoral Care updated.

See [Setting Up DropBox](#) for information on setting up dropbox for the Pastoral Care Cloud service.



The screenshot shows a dialog box titled "Cloud Guest Configuration" with a close button (X) in the top right corner. The dialog contains the following elements:

- Enable Cloud
 - Use default Dropbox folder (Recommended)
 - Manually Select Dropbox Folder
- Dropbox Folder: C:\Users\russell\Dropbox\
- Buttons: "Join Cloud Network" (with a cloud icon) and "Cloud Email Setup" (with an envelope icon)
- Password to Unlock Cloud Files: stephen
- Computer Name: russell
- Provide notification when church office updates Cloud
- Buttons: "Help" (with a question mark icon), "Cancel" (with a left arrow icon), and "Close" (with a right arrow icon)

Enable Cloud

Tick this option to enable the Pastoral Care Cloud on the computer you are currently using.

Enable Cloud

Dropbox Location

We highly recommend using the default location for the Dropbox folders. There is absolutely NO advantage to setting a network path for this option. The files stored on Dropbox are NOT system critical, in that they do not need backing up. Please do not install Dropbox folders on a shared network drive.

Use default Dropbox folder (Recommended)


Manually Select Dropbox Folder

Dropbox Folder

C:\Users\russell\Dropbox\

Join Cloud Network


Pressing this button will send a message to the Pastoral Care Cloud Host computer, at your church, that you want to join the Cloud network.

Join Cloud Network 

Joining the cloud network is NOT immediate. A person at the church must use the host program to approve your pending connection. Once joined you will stay joined until you choose to leave the network, or a person turns you off by de-selecting you from the host program.

Cloud Email Setup

While you are Cloud Connected, it makes sense that your church emails are not available to you. Use this setup area to define an email setup that will be available for you to use. This setup will be used by any email feature in Pastoral Care while you are connected to the Cloud.

Cloud Email Setup 

Click on each area below for more information on these settings.

Cloud Email Setup

The Following email settings will be used to send emails when in Cloud mode as the email settings will be determined by where you connect to the Cloud.

SMTP Server:

Server Authentication Required

 Username:

 Password:

Mail Authentication Required

 Mode:

Auto Detect Port & SSL

Enable SSL Mode

 SSL Mode:

 Port:

Disable 'Chunking' (For MsExchange Servers Only)

Your Email Address:




Your Name:

Activate Email Delay

 After emails delay sending by Seconds

Individual Email 'To:' Restriction

 Maximum amount of email addresses per email

Help  Cancel  Close 

SMTP Server

SMTP Server:

Common SMTP settings

The most common SMTP server name is the one provided by your ISP (Internet Service Provider)

Some Examples:

- smtp.hotmail.com
- mail.bigpond.com
- mail.iinet.net.au
- etc

Your Own Email Server

If you are running a Windows Network with a Server and Domain, and you are using a Proxy Server for controlling access to Internet Services, then the SMTP address you enter in Pastoral Care is the Proxy Server name, (not an IP address). For example, if your proxy server is called AngelBaptist_Proxy then the SMTP address in Pastoral Care will be AngelBaptist_Proxy.

If you are not using proxy server as your internet access controller you can try any of the following settings for SMTP address:

IP Address of your domain server (eg: 192.168.1.19)

Your Domain Name (angelbaptist.com.au)

Server Authentication

Not all email servers require authentication. Server Authentication is the process of sending an email address and password to the email server to say to the server: "Hi, you should know me, here is my credentials, please send the following emails for me..."

If you tick this option, you will need to fill in your email address (username) and your password. These two bits of information are supplied by your Internet Service Provider.

Server Authentication Required

Username:

Password:

Mail Authentication

Mail Authentication is a newer method of attempting to provide automated identification of non-spam messages. Some internet service providers are starting to adopt this requirement, however at present this is rarely used. We

suggest an Auto Mode if this is required, however if you have the information from your ISP on what type of authentication is required, you can manually select it in the list.

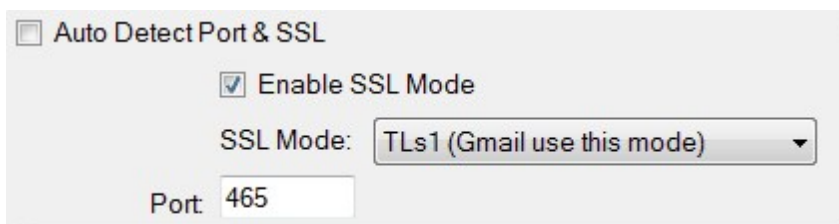


Mail Authentication Required

Mode:

PORT & SSL

We recommend using Auto Detect for the SSL and PORT settings. If you want to use GMAIL (Google Mail) as your SMTP email transmission service, the following settings should be entered in this area...



Auto Detect Port & SSL

Enable SSL Mode

SSL Mode:

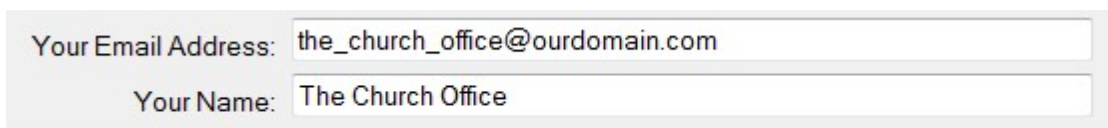
Port:

Disable Chunking

ONLY tick this option if you are sending via a Microsoft Exchange Server, and recipients that are receiving your email via an exchange server also are receiving your message but it appears to be jumbled.

Your Details

Enter your email address that you want to be used as the sender (by default) and the name to be used as the sender. Note, if you setup Security, you can have multiple email "from" setups for each user of Pastoral Care giving you multiple reply to addresses.

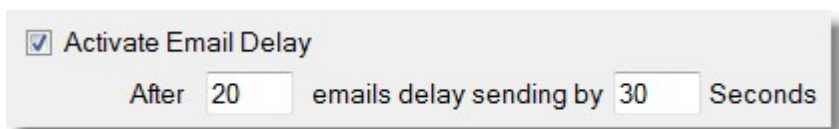


Your Email Address:

Your Name:

Email Delay

To try and avoid being identified as a Spammer, setup an email delay here.



Activate Email Delay

After emails delay sending by Seconds

Email Queue

All email in Pastoral Care is now managed by a separate program called the Email Queue. You don't have to start this, it starts automatically. When using Email Delay, all emails are sent from Pastoral Care, immediately to the Queue program. This frees up Pastoral Care and your computer for doing other things without taking over the computer while emails are being transmitted. The Queue program will take all of the settings for email, including the Email Delay settings, and send them out as directed.

[See Email Queue](#) for more information on this feature.

Individual Email Restriction

When sending emails, by default, Pastoral Care sends one email to one person, individually addressed. If you choose to from the various email sending locations in Pastoral Care, you can choose to send one email to many people all addressed together in the "To" field.

This setting will limit the number of "TO" people you can add to one email.

Individual Email 'To:' Restriction

Maximum amount of email addresses per email

Depending on your internet provider, you may or may not have to use this feature, or even adjust this setting.

Password

Enter the password setup by the Host Program for accessing the cloud files.

Password to Unlock Cloud Files

Username

Enter a name that will appear in the Host Program users list, letting the church see who has access to the cloud network.

Cloud User Name

Notifications

Tick this option to let Pastoral Care notify you when a new database update is available on the cloud. This is recommended to leave ticked.

Provide notification when church office updates Cloud

Setting Up DropBox

This information is here as a guide only. Since we are using a third party cloud solution, Pastoral Care can not guarantee the setup steps will remain the same. Pastoral Care does not guarantee continued service with DropBox as this is a third party provided service that is out of our control.

Use of Dropbox is currently free for up to 2GB of data. This should be sufficient for most churches, however Pastoral Care does guarantee that this service will remain free for the life of the Pastoral Care cloud service.

Step 1

Go to www.dropbox.com and CREATE AN ACCOUNT. Please note down your chosen Username and Password. All

people wanting to access Pastoral Care on cloud must know the username and password.

Step 2

ONce your account is created, and you have your username and password, Install drop box on your computer.

IMPORTANT INFORMATION. You MUST use the dropbox DEFAULT settings for folder location on your computer. Creating a different location may cause Pastoral Care to have problems connecting to Dropbox.

Step 3

Configure each computer that wants to use the Dropbox for remote cloud access as a Guest. (See [Setting Up Guest Computers](#))

Step 4

At the church office, setup one computer on your network, or your main Pastoral Care computer as the Host computer. Full instructions on this are provided with the download and purchase of the Pastoral Care Cloud Host program.

Pastoral Care 12

Pastoral tools for todays church.

Chapter 12

Appendix



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The following 6 additional programs can all be launched from the [Pastoral Care 12 Resources](#) program installed with Pastoral Care 12. The resources program provides a single launch area for not only these 4 programs, but also a host of support documents.

If you want to manually created shortcuts on your desktops to any of these programs, the following locations are where they are loaded.

Pastoral Care Doctor

C:\Program Files\Pastoral_Care_Ministries\Pastoral_Care_12\PC12_Doctor.exe

[See Pastoral Care Doctor](#) for more information

Pastoral Care Communicator

C:\Program Files\Pastoral_Care_Ministries\Pastoral_Care_12\PC12_Communicator.exe

[See Pastoral Care Communicator](#) for more information

Pastoral Care Personal SMS

C:\Program Files\Pastoral_Care_Ministries\Pastoral_Care_12\PC12_Personal_SMS.exe

[See Pastoral Care Personal SMS](#) for more information

Pastoral Care Directory

C:\Program Files\Pastoral_Care_Ministries\Pastoral_Care_12\PC12_Directory.exe

[See Pastoral Care Directory](#) for more information

External Backup Program

C:\Program Files\Pastoral_Care_Ministries\Pastoral_Care_12\PC12_External_Backup.exe

See [External Backup Program](#) for more information

External Restore Program

C:\Program Files\Pastoral_Care_Ministries\Pastoral_Care_12\PC12_External_Restore.exe

See [External Restore Program](#) for more information

Conversion Utility

C:\Program Files\Pastoral_Care_Ministries\Pastoral_Care_12\PC12_Conversion.exe

See [Conversion Utility](#) for more information

Pastoral Care 12

Pastoral tools for todays church.

Chapter 13

Pastoral Care Doctor



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[Introduction](#)

[Installing the Pastoral Care Doctor](#)

[Starting Pastoral Care Doctor](#)

[Using the Doctor Program](#)

Introduction

The Pastoral Care Doctor program can be launched from the [Pastoral Care 12 Resources](#) icon on your desktop.

This program is used for fixing minor database issues, compacting your database and some general background problem solving.

See [Using the Doctor Program](#) for more details.



Please note, all of the operations of the Doctor Program cannot be undone! You MUST have a current backup of your database safely saved elsewhere before running the Doctor program and pressing any of the feature buttons on the doctor program main screen.

Installing the Pastoral Care Doctor

The Pastoral Care Doctor program is installed along with Pastoral Care. There is no separate installation software for this program.

Starting Pastoral Care Doctor

Find the Pastoral Care 12 folder on your desktop, and click the Resources Icon to start the Resource program. From there you can select the Pastoral Care Doctor and press the Launch button to run.

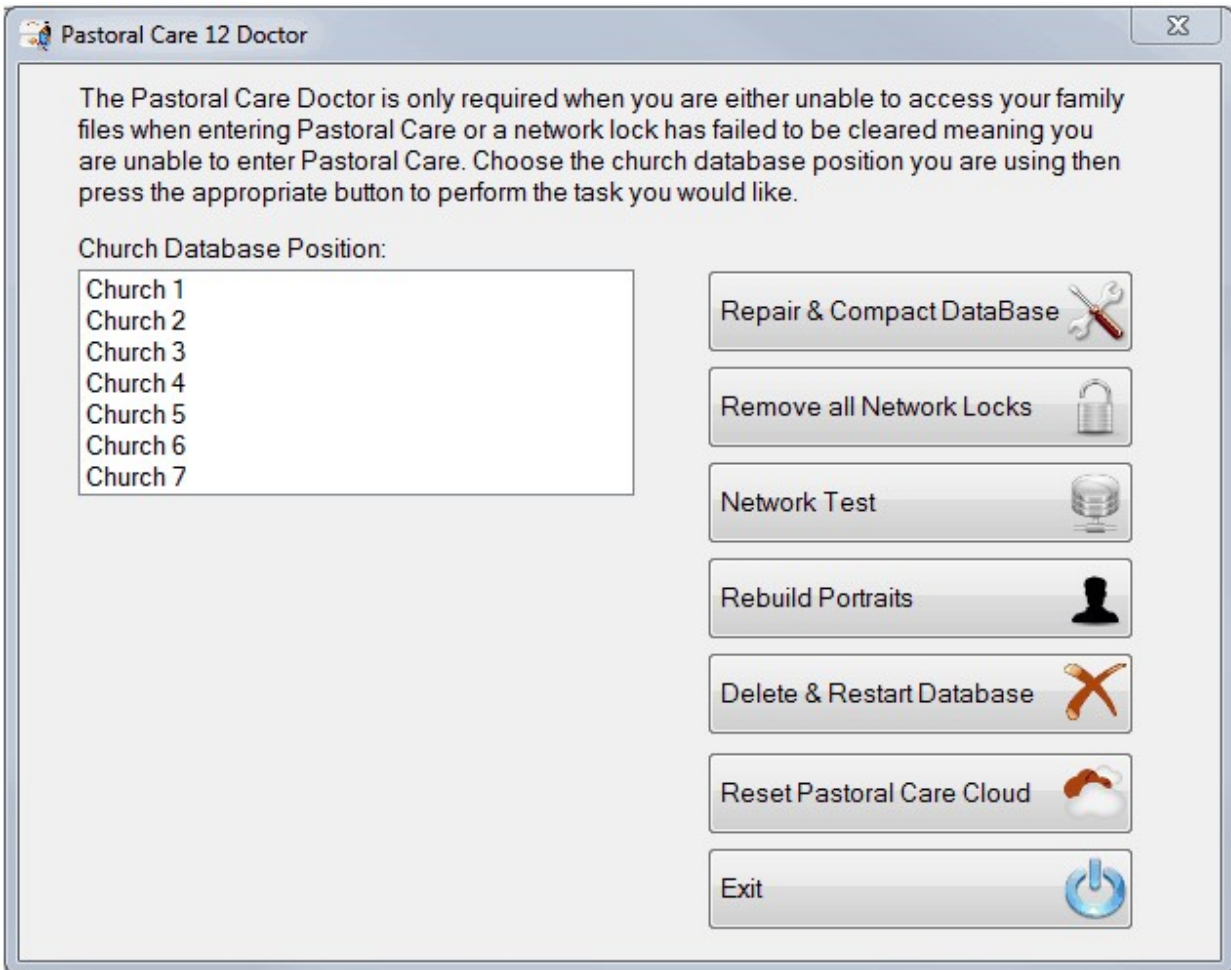
Using the Doctor Program

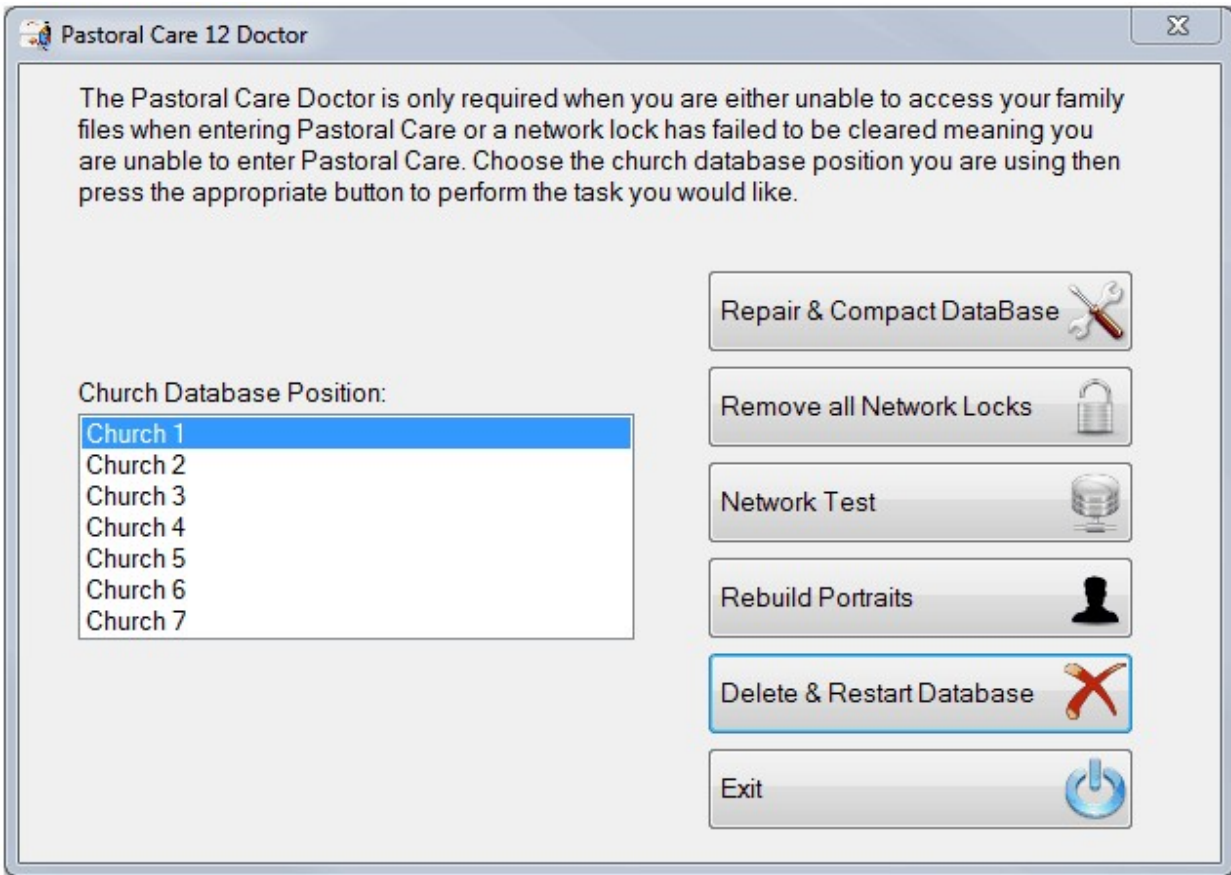
To use the Doctor program, simply select a database position to repair (Usually church 1 for most churches) and then select the function to perform.

You should generally only use the Doctor Program when you are experiencing problems with your church database.



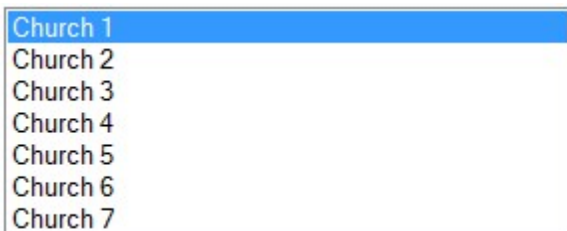
Click on each part of this screen for more details.



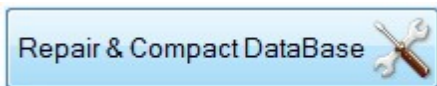


Church Database Position

Select the church database that you want to perform a repair on. Most people will be using Church 1 by default.



Repair and Compact



Press this button to perform a database Compact and Repair function. This simply tidies up the information stored in Pastoral Care to basically perform at it's best and to take up less space on your hard disk.

Remove Network Locks

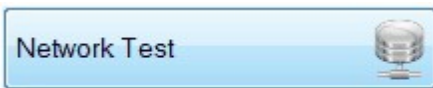


A Network lock is a lock we place on various files and locations / features throughout Pastoral Care when a person is in that area. If they exit Pastoral Care in an unplanned way, or something goes amiss when they are exiting Pastoral Care, that lock can stay in place permanently.

If you are being locked out of an area, and you believe the message to be false, try the Remove Network Locks.

Note, this only works for a network version of Pastoral Care.

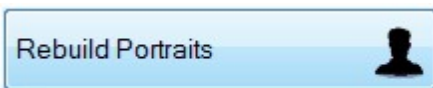
Network Test



Press the Network Test button to see if your network is performing as it should for Pastoral Care to operate correctly.

This tool is ideal for troubleshooting any issues you might be having when setting up Pastoral Care on a network.

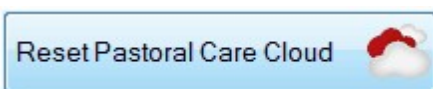
Rebuild Portraits



If you are running a lot of portrait (photo) information onto a report, then using this repair option will compact your photos as small as possible without losing any quality settings. There is also an option to bulk convert your photos to monochrome. Ideal if you are only printing out on a mono laser printer for your photo directories etc.

If you want to use this feature, please backup Pastoral Care using the Backup Utility before doing the Rebuild Portrait option. This is important in case something happens that's unexpected during the repair, such as a power failure!

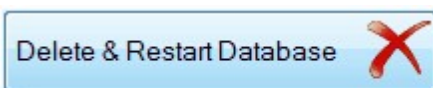
Reset Pastoral Care Cloud



Press this button to clear all information from the Cloud area. This does not delete your church database, however all remote changes that are queued for updating will be lost. ONLY use this feature if your cloud program has become non responsive or is not performing as expected.

This feature will only work if you have purchased and installed Pastoral Care Cloud.

Delete and Restart Database



This option will DELETE your church database, and place a brand new EMPTY database in its place. Do NOT run this option unless this is exactly what you want to achieve.

Pastoral Care 12

Pastoral tools for todays church.

Chapter 14

Pastoral Care Communicator



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A Free program that you can distribute to the leadership of your church.

For full details see...

[Introduction](#)

[Installing Communicator](#)

[Starting Communicator](#)

[Using Communicator](#)

Introduction

The Pastoral Care Communicator is a free standalone program designed primarily for the leadership of your church. It can import a file created from Pastoral Care (The file can be created from the Export area found on the Explore Tab of Pastoral Care)

Additional Contacts

As well as including all people / selected people from your Pastoral Care database, each person using the Communicator program can also add their own personal contacts to their Communicator database.

Installing Communicator

The Pastoral Care Communicator is installed along with Pastoral Care by default. If you want to install this on other computers, you can either download it from our web site, or install it manually from the CD. The installation for this program can be found on the Pastoral Care CD under its own folder called Communicator.

The files in this folder can be copied to say another CD, or a USB Flash Drive for distribution to other church leaders / members. There is no additional charge for copying and using this program multiple times within your church. Simply run the setup program found in the Communicator Folder to install this on a Windows computer.

Starting Communicator

Find the Pastoral Care 12 folder on your desktop, and click the Resources Icon to start the Resource program. From there you can select the Communicator program and press the Launch button to run.

If the Resource program is not installed on your computer, look for the Communicator Icon on your desktop, or on your start menu.

Using Communicator

The basic steps for sending out an Email or SMS are very simple. Simply Select a list from the main screen, tag the people you want, press SMS or EMAIL from the toolbar, compose your message and press Send.

Note this window is shown with some sample lists loaded. If your available lists are empty, you will need to create lists from Pastoral Care, and export them using the Export feature found on the Explore Tab of Pastoral Care.



Click on each part of the Communicator window below to learn more about this program.

Tag	Surname	Name	Type	Email
<input checked="" type="checkbox"/>	Brown	Heather	Family Email	peter@spirit.com.au
<input checked="" type="checkbox"/>	Brown	John	Family Email	peter@spirit.com.au
<input checked="" type="checkbox"/>	Chapman	Ruth	Family Email	adrien@spirit.com.au
<input checked="" type="checkbox"/>	Collins	Stephen	Family Email	jill@spirit.com.au
<input checked="" type="checkbox"/>	Dimsey	Lorraine	Family Email	richardl@spirit.com.au
<input type="checkbox"/>	Dimsey	Sarah	Family Email	richardl@spirit.com.au
<input type="checkbox"/>	Dobber	Hugo	Family Email	hugo@spirit.com.au
<input type="checkbox"/>	Eadon	Jack	Family Email	jack@spirit.com.au
<input type="checkbox"/>	Eadon	Edith	Family Email	jack@spirit.com.au
<input type="checkbox"/>	Edwards	Helen	Family Email	david@spirit.com.au

Available SMS Lists

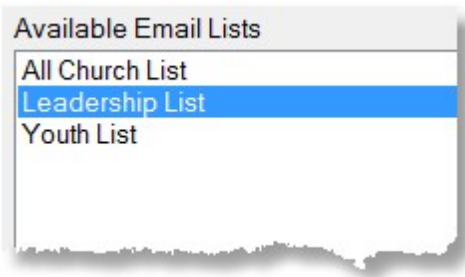
These are the Available SMS Lists that you have exported from Pastoral Care using the Export area located in the Explore Tab of Pastoral Care. If this is empty, then you have not imported any Pastoral Care data as yet. See [Import](#) for information on this step.



Available Email Lists

These are the Available Email Lists that you have exported from Pastoral Care using the Export area located in the

Explore Tab of Pastoral Care. If this is empty, then you have not imported any Pastoral Care data as yet. See [Import](#) for information on this step.



Tagging

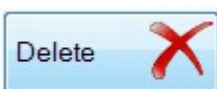
When you have selected a list, people from that list are displayed in the [Select People](#) area. People that you tag *in each* list are permanently tagged or remembered for use again next time you start the Communicator.

For example, if you had tagged 6 people from the Youth SMS list, next time you come into Communicator and select the Youth SMS list, those 6 people will still be tagged, and they will then be pre-loaded into the [SMS](#) SMS area for sending an SMS to. The same goes for [Email](#).

You can use the Tag All and Un Tag All buttons to bulk update all people in the window, or you can manually tag individual people by ticking the tag field next to their name.



Delete List



Press the Delete button to remove the selected list from your Communicator Program. This does not remove people from your Pastoral Care database, as this program is independent of that database.

Select People

Tag	Surname	Name
<input type="checkbox"/>	Allwright	Stevo
<input checked="" type="checkbox"/>	Allwright	maz
<input checked="" type="checkbox"/>	Angel	Peter
<input checked="" type="checkbox"/>	Anglin	Brent
<input checked="" type="checkbox"/>	Anglin	Katey
<input type="checkbox"/>	Barton	Big Ray
<input type="checkbox"/>	Barton	Ernie

Manually select or deselect people for receiving a communication by clicking on the Tag field on the same line as their name.

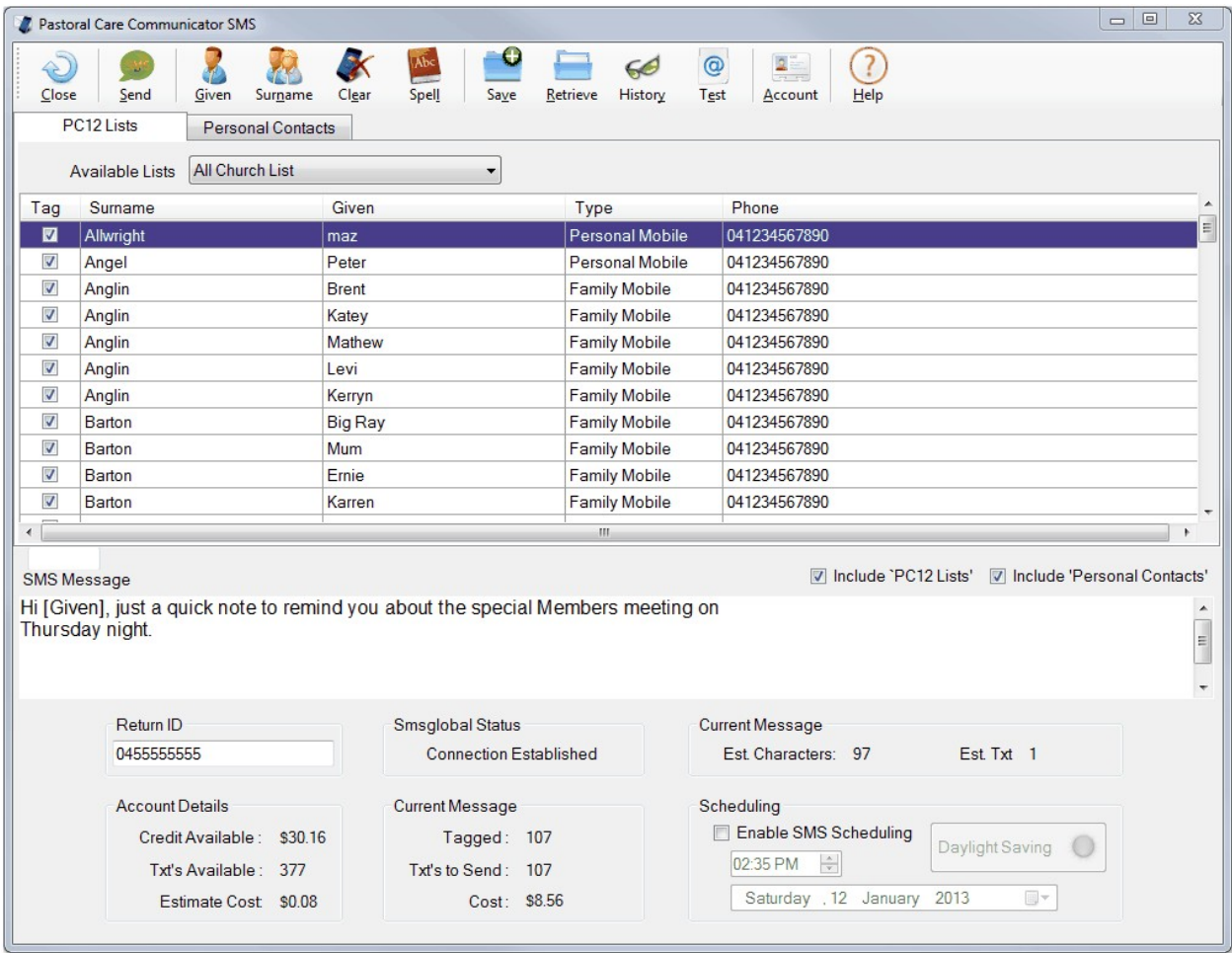
SMS



Press the SMS button on the toolbar of the Communicator program to load the SMS send window where you can compose and send your SMS message to selected people.



Click on each part of this window shown below for more information.



Toolbar



When you are ready, press the Send button to send your entered message to the selected List / People



Insert the Given Name of the recipient in the message. This is ideal for personalising each message.



Insert the Surname of the recipient in the message. This is ideal for personalising each message.



Erase the currently composed message.



Access the Spell Checker Settings



Save the current message as a template for re-use.



Load in a Saved message so you can send it again.



Show the details of the last 200 SMS messages sent.

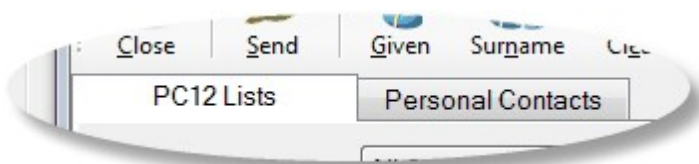


Send a test SMS message. This will cost you for the test message as you are actually sending a TXT message via SMS global to a manually entered Mobile Phone Number



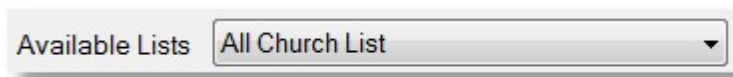
Press the Account button to load the SMS global web page where you can login to your SMS Global Account using your SMS Global Username and Password etc.

Lists and Contacts



Use the PC12 Lists option to select people from a list, and use the Personal Contacts option to select people from the contacts you have entered into Communicator yourself.

Select Lists



Select the List that you want to send SMS messages to, or to select people from for sending an SMS message to.

Select People

Click on the Tag field to either include (ticked) people, or not include (un-ticked) people from receiving an SMS message.

Tag	Surname	Given
<input checked="" type="checkbox"/>	Allwright	maz
<input checked="" type="checkbox"/>	Angel	Peter
<input checked="" type="checkbox"/>	Anglin	Brent
<input checked="" type="checkbox"/>	Anglin	Katey
<input checked="" type="checkbox"/>	Anglin	Mathew
<input checked="" type="checkbox"/>	Anglin	Levi
<input checked="" type="checkbox"/>	Anglin	Kerryn

Include

Include 'PC12 Lists' Include 'Personal Contacts'

Tick both of these options to allow you to choose from both personal Contacts, and people from Pastoral Care lists for sending an SMS to.

Writing your message

When composing your message, you should be aware of the following:

- Be wary of using too many short words like LOL etc. Depending on your audience, some might not understand these or mis-understand the message
- When using Given Name and Surname objects, because names can be of a large range of varying lengths, some of the single text messages you think you are sending may be 2 messages in length costing you more to send

SMS Message

Hi [Given], just a quick note to remind you about the special Members meeting on Thursday night.

SMS Global Status

This area shows you the status of the connection to SMS Global. Connection Established means that Pastoral Care is able to send SMS messages. If you get any errors here, you may need to check your settings in the settings area of Communicator, or login to your account at www.msglobal.com and check that everything is setup as needed there.

Smsglobal Status

Connection Established

Scheduling

When to tick the Scheduling option, all SMS messages tagged for sending in the current session will be sent at the scheduled time.

How Does Scheduling Work?

It is important to note that Pastoral Care does not handle the scheduling of the SMS messages in that you do not need to leave your computer on to send messages at the allocated date and time. Once the SMS messages have been sent to the SMS Queue, and subsequently dispatched to SMS Global for delivery to the the actual phone, the messages sit at SMS Global until the allocated date and time, and then if there is enough credit in your account to send the messages, they will be delivered.

Time Zones

If you are sending all messages to people in the same time zone, then the date and time shown in the Scheduling area is the date and time the message will be sent. If some people are not in your current time zone, please have consideration for when the message might arrive!

Daylight Saving

Press the Daylight Saving button to confirm Melbourne Time as the SMS Servers used to send the message all run on Melbourne Time. The time on the Daylight Saving window should be the same time as Melbourne Time (Australian Eastern Standard Time). Remember that the TIME set in scheduling is your local time set on your computer in your time zone!

Payment for Scheduled Messages

After Scheduling some SMS messages, you are committed to these being sent. Once the message have left the Communicator Program and have arrived at SMS Global, they will be dispatched at the allocated date and time. At the time of sending, you must have enough account funds to cover the messages being sent, or they will fail.



Current Message

This area shows the number of people tagged to receive the composed message, and the cost estimates based on your account setup and cost per SMS you have entered in the SMS Setup area.

Current Message
Tagged : 108
Txt's to Send : 108
Cost : \$8.64

Account Details

This area shows you the current SMS Global account balance and how many SMS messages you can send on your current balance.

Account Details

Credit Available : \$30.16

Txt's Available : 377

Estimate Cost \$0.08

Email



Press the Email button on the toolbar of the Communicator program to load the Email send window where you can compose and send your Email message to selected people.














Click on each part of this window shown below for more information.

Tag	Surname	Given	Type	Email
<input checked="" type="checkbox"/>	Allwright	Stevo	Family Email	stevo@hotmail.net.au
<input checked="" type="checkbox"/>	Allwright	maz	Family Email	stevo@hotmail.net.au
<input checked="" type="checkbox"/>	Angel	Belinda	Family Email	peter@spirit.com.au
<input checked="" type="checkbox"/>	Angel	Helen	Family Email	peter@spirit.com.au
<input checked="" type="checkbox"/>	Anglin	Brent	Family Email	Brentl@spirit.com.au
<input checked="" type="checkbox"/>	Anglin	Katey	Family Email	Brentl@spirit.com.au
<input checked="" type="checkbox"/>	Anlin	Mathew	Familv Email	Brentl@spirit.com.au

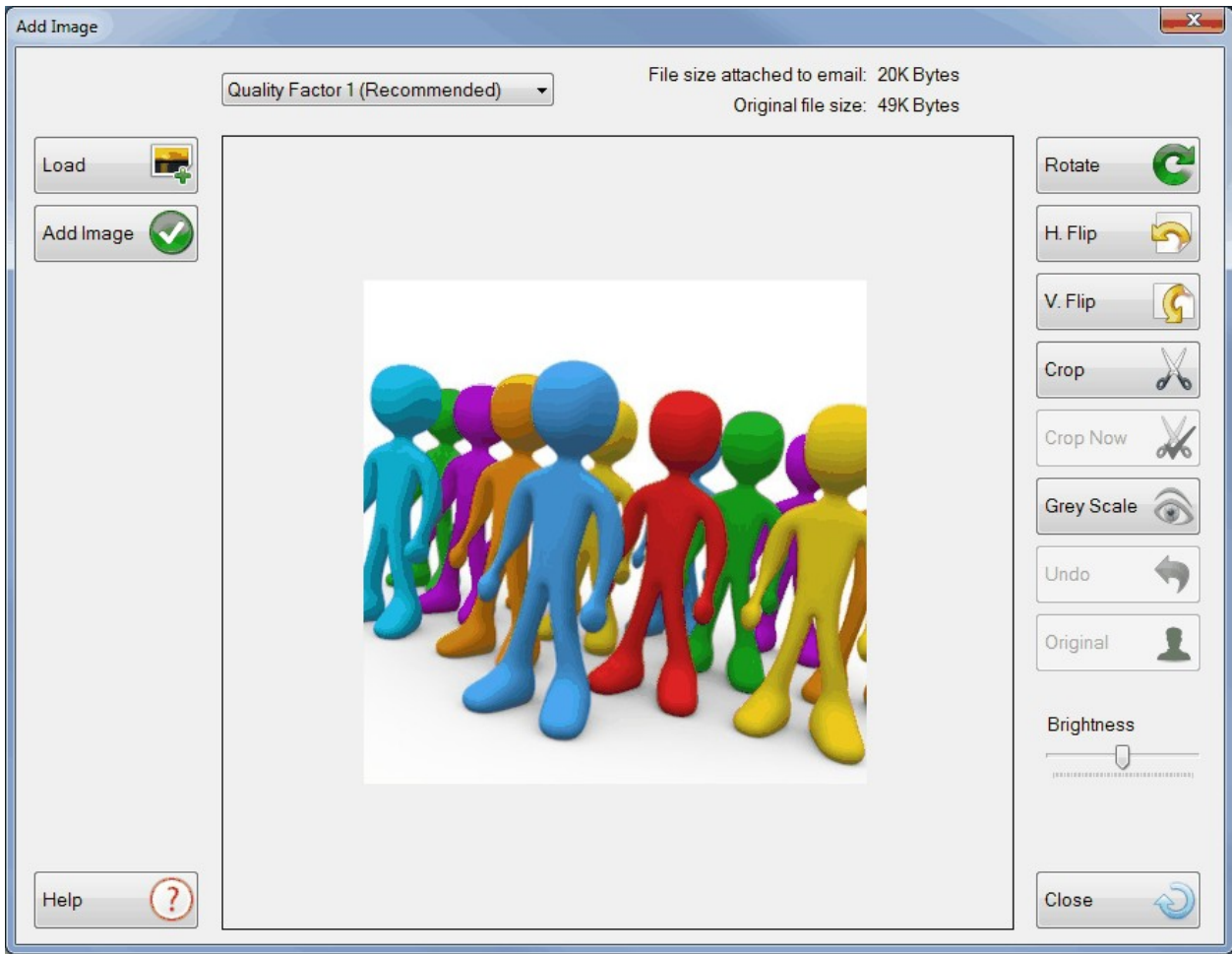
Toolbar

Shown below are each of the Toolbar items on the Compose Email area of The Email Manager,

 Send	<p>Press Send to send the currently composed SMS message to the selected people.</p>	 Clear	<p>Erase the contents of the currently composed email.</p>
 Given	<p>Insert a field for a person's Given Name to be used in the email.</p>	 Spell	<p>Access the Spell Checker Settings</p>
 Surname	<p>Insert a field for a person's Surname to be used in the email.</p>	 Save	<p>Save an email as a template for later re-use. Rather like a permanent draft copy that you can re-use over and over again.</p>
 Image	<p>Insert an Image into the email.</p>	 Retrieve	<p>Load in a saved email for use. Naturally the loaded email can be edited and changed if required.</p>
 Hyperlink	<p>Insert text as a Hyperlink into the email. See Hyperlink for more details.</p>	 History	<p>Press the History button to see the last 200 emails sent using this program.</p>
 Table	<p>Insert a Table into the email. Tables are ideal for laying out an email with just the way you want to see it. Table borders can be transparent giving to the ability to place text and graphics in specific locations.</p>	 Test	<p>Manually send the composed email to an email address you enter to try out your email.</p>
 Colour	<p>Set the colour of your text or background of text to any colour you desire!</p>		

Image

Click on each part of the Add Image box below to learn more about adding an image to an email. Note, once an image has been added to an email, you can select and re-size the image from the email itself before sending it out.

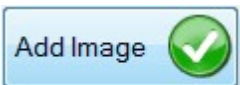


Load



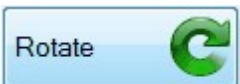
Load an image from a file to be added to the email.

Add Image



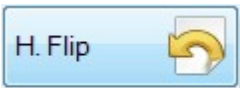
Add the selected (and modified if you have done any modifications) image to the current position in the email. Note once an image has been added, you can re-size the image directly in the email using the mouse to click and drag the corners of the image.

Rotate



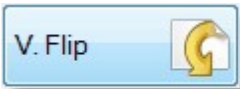
Rotate the image 90 Degrees to the right. Keep pressing this to continue the rotation in 90 degree steps.

H Flip



Flip the picture (mirror) horizontally.

V Flip



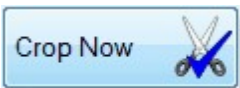
Flip the picture (mirror) vertically.

Crop



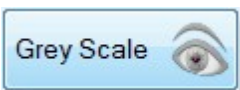
Select an area of the picture to crop.

Crop Now



After marking an area with Crop, press the Crop Now button to complete the crop.

Grey Scale



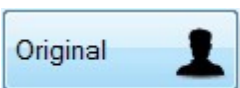
Convert the picture to grey tones only.

Undo



Where available, you can press this to undo the last edit to the picture.

Original



Use this to reload the original picture and discard all of your changes.

Brightness



Adjust the brightness of the picture.

Quality Factor



We recommend a Quality Factor of 1 for most images for an email. The original and projected file save size is shown next to the Quality Factor Selection.

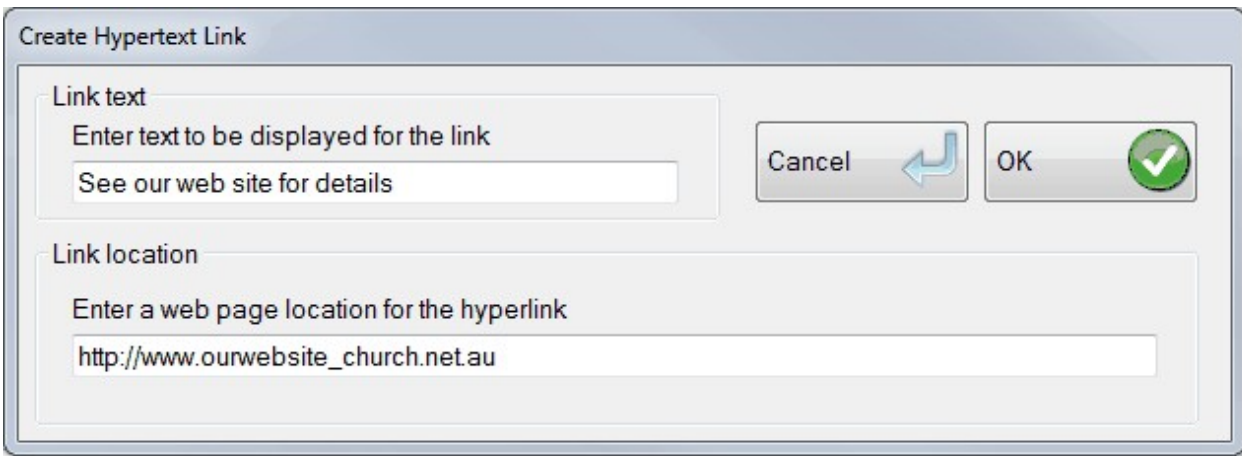
Image Preview



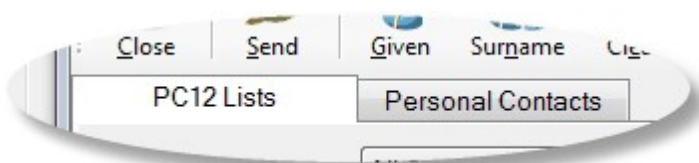
This shows a preview of the selected image to be inserted in the email.

Hyperlink

Type in some text for the display of the hyperlink, and the web site address that you want to load when the hyperlink is clicked in the email.



Lists and Contacts



Use the PC12 Lists option to select people from a list, and use the Personal Contacts option to select people from the contacts you have entered into Communicator yourself.

Select Lists

Available Lists All Church List

Select the List that you want to send Email messages to, or to select people from for sending an Email message to.

Select People

Click on the Tag field to either include (ticked) people, or not include (un-ticked) people from receiving an Email message.

Tag	Surname	Given
<input checked="" type="checkbox"/>	Allwright	maz
<input checked="" type="checkbox"/>	Angel	Peter
<input checked="" type="checkbox"/>	Anglin	Brent
<input checked="" type="checkbox"/>	Anglin	Katey
<input checked="" type="checkbox"/>	Anglin	Mathew
<input checked="" type="checkbox"/>	Anglin	Levi
<input checked="" type="checkbox"/>	Anglin	Kerryn

Include

Include 'PC12 Lists' Include 'Personal Contacts'

Tick both of these options to allow you to choose from both personal Contacts, and people from Pastoral Care lists for sending an Email to.

Writing your message

Use the Subject field to enter a subject for your email and enter the body of the email below that.

The following standard font options can be used to adjust highlighted / selected text.

Arial 10 **B** *I* U | | 100%

Subject

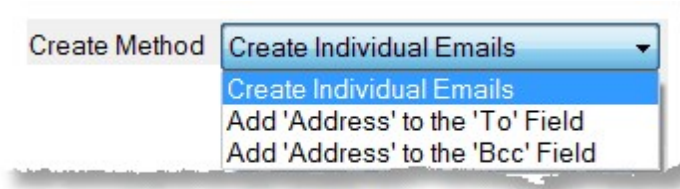
Enter your Email here, you can include [Given] and [Surname] objects for personalising your message.

Tips for composing emails.

Try and keep your Images small if using an image. Don't forget that the Table object can be used to help layout of the email, this is particularly useful for placement of images.

Create Method

Select any of the create methods that suit your needs.



Individual Emails

This is the default option. This options sends one email to each person, personally addressed. This keeps all address information to all recipients private and confidential. This also takes the longest time, and uses the most internet usage, which may be a factor if you are sending an image or attachment with the email.

Note: If you want to send **personalised** emails using the Given Name and Surname objects, you MUST select Individual Emails for this feature to work!

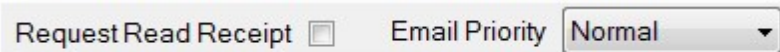
Add Address to the To Field

This option groups all the address information onto the TO: field, allowing everyone to see each others address information. This can be useful for selected email types where you intentionally want to reveal email address data to all recipients. Using this feature saves on email sending time, and on internet usage as only one email is sent.

Add Address to the BCC field

This option groups all the address information onto the BCC: field, allowing Pastoral Care to send one email, but to hide all of the copied or included address information. This can be useful for selected email types where you want to hide all email address data, and not use a personal email therefore saving on Time and Internet Usage.

Email Options



Read Receipt

Tick this option for a read receipt to be sent back to the email address setup in the Communicator [Setup](#) area.

Email Priority

Set the priority for the email to be sent as. This does not affect how fast the email is delivered, it can affect the display of emails in compliant email programs to show high priority emails in a different colour in the inbox.

Import



Press the Import button to let you import SMS and Email List data from Pastoral Care. A Communicator data file can be created by using the Export Feature on the Explore Tab of Pastoral Care.

Security



Turn Security on if you want to assign a password to restrict access to this program.

Please note, do NOT forget your password, it cannot be hacked in anyway.



Contacts



Press the Contacts Icon to open the Contacts Page. From here, you can add your own personal contacts that may not have been imported from your church.

Add a new Contact

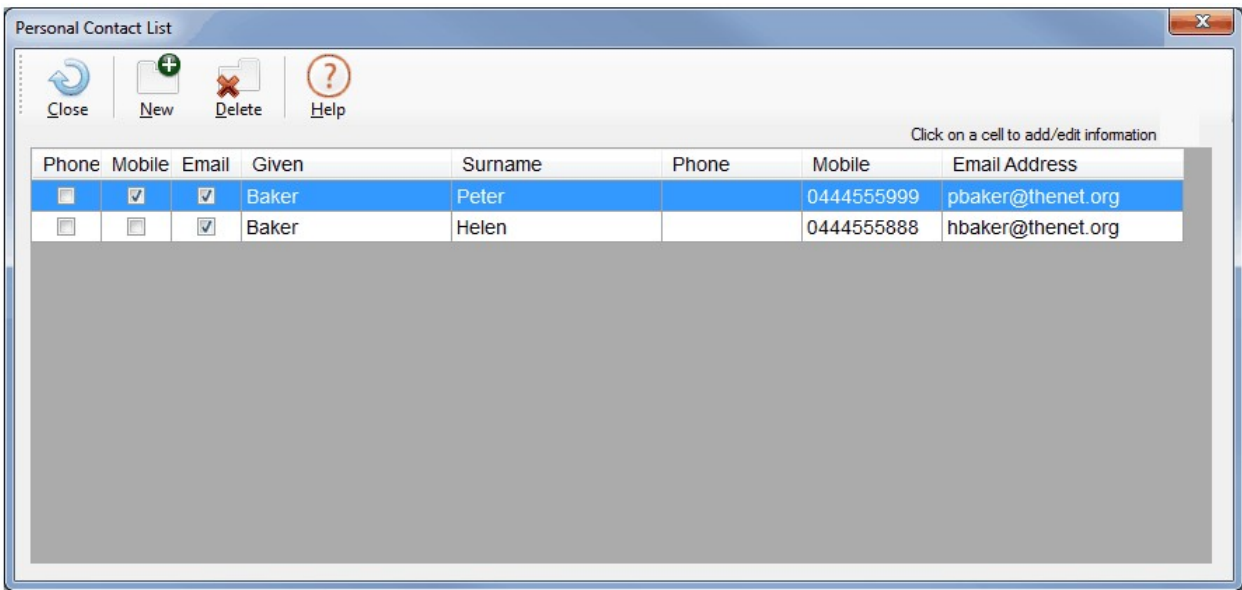
To add a new contact, press New, and click in each field to add data. Information is saved automatically.

Delete Contact

Simply select your contact and press the Delete button

Phone Mobile and Email

Tick which fields you want to activate for communication methods.



Setup



Press the Setup icon on the toolbar to set up the options for SMS and Email sending.

See: [SMS Setup](#) and [Email Setup](#) for more information.

SMS



Click on each part of the window below to learn more about the SMS setup area for Communicator. See also [How to Setup SMS](#) for more information.

Setup

SMS Setup

Create Account

Country: Australia
 New Zealand
 Other Country

User Name: Password:

Default Return Mobile Number: Cost per Text: Cents

International Mobile Area Code: Eg: Australia is 61, New Zealand is 64

Local Area Code for Landline: Eg: Vic/Tas is 03, NSW is 02 Qld is 07, other states are 08

First two digits of mobile numbers: Eg: Australia is 04, New Zealand is 02

Notify when credit falls below \$

Help SMS Test Email Test Cancel Close

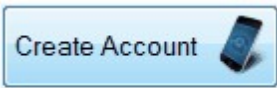
How to Setup SMS

For first time setup follow these simple steps.

1. Press the Create Account button in the SMS Setup Area.
2. A Web Page should open to www.msglobal.com
3. Select the link for New User
4. Complete the online application
5. SMS Global will send you your username in an email, and will send you a text message with your password
6. Complete the setup of Pastoral Care by entering in your account settings (username and password) into the SMS Configuration area.

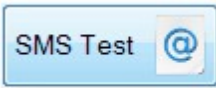
NOTE: At the time of publishing, www.msglobal.com.au were offering their accounts free of sign up costs, no ongoing account fees, and 25 free text messages to get you started. This can change without notice, but has been a standard account setup feature for many years.

Create SMS Account



Press this button to be taken to the SMS Global Web Site for creating an SMS Account.

Send a Test SMS



Press this button to allow you to quickly type a test message and send it to a manually entered mobile phone.

Country

Country: Australia
 New Zealand
 Other Country

Choose your country of origin. Your choice here is important to be certain of reliable message broadcasts. Each country has different features enabled, see the feature list below for full details.

Country	TXT Message	TXT to VOICE	TXT to FAX
Australia	YES	YES	YES
New Zealand	YES	NO	NO
Other Country	YES	NO	NO

TXT Message

Standard 160 Character Text Message. You can send more than 160 characters in one message, however each 160 characters costs 1 text message charge,

TXT To Voice

Only available in Australia. If a person answers a Land Line number that a text message is being sent to, a computer generated voice will guide the person through the selection to hear the message.

TXT To Fax

If a Fax Machine answers a text message send, then the message will be converted to FAX

Account Settings

User Name:	<input type="text"/>	Password:	<input type="text"/>
Default Return Mobile Number:	<input type="text"/>	Cost per Text:	<input type="text" value="8"/> Cents

User Name

Enter your SMS GLOBAL user name for the default SMS Global Account

Password

Enter your SMS GLOBAL password for the default SMS Global Account

Default Return Mobile Number

Enter a return mobile phone number if you want people to be able to reply to your message.

Cost Per Text

Enter the current price that you have on offer from SMS global in cents per text. This setting is used so that Pastoral Care can estimate the cost of sending messages etc.

International Mobile Area Code

International Mobile Area Code:

Enter your 2 digit country code for your International Mobile area code. If you are in Australia or New Zealand this field will be filled in for you.

Local Area Code

Local Area Code for Landline: Eg: Vic/Tas is 03, NSW is 02 Qld is 07, other states are 08

This field can only be filled in for Australia. Enter the Area Code for your state.

First Two Digits

First two digits of mobile numbers:

Enter the first 2 digit's that you use to send a text message or call a mobile phone in your country.

Notify

Notify when credit falls below \$

Enter an amount in Dollars to set a trigger for Pastoral Care to warn you that your account is going low.

Email



Click on each part of the window below to learn more about the Email setup area for Communicator.

The screenshot shows the 'Setup' dialog box with the 'Email Setup' tab selected. The fields and options are as follows:

- SMTP Server: mail.bigpond.com
- Server Authentication Required
 - Username: []
 - Password: []
- Mail Authentication Required
 - Mode: Auto Detect - Highest to Lowest Search
- Auto Detect Port & SSL
 - Enable SSL Mode
 - SSL Mode: Auto Detect
 - Port: 25
- Disable 'Chunking' (For MsExchange Servers Only)
- Your Email Address: office@ourchurch.org
- Your Name: The Church Office
- Activate Email Delay
 - After 10 emails delay sending by 60 Seconds
- Individual Email 'To' Restriction
 - Maximum amount of email addresses per email 100

Buttons at the bottom: Help, SMS Test, Email Test, Cancel, Close.

SMTP Server

SMTP Server: smtp.gmail.com

Common SMTP settings

The most common SMTP server name is the one provided by your ISP (Internet Service Provider)

Some Examples:

- smtp.hotmail.com
- mail.bigpond.com
- mail.iinet.net.au
- etc

Your Own Email Server

If you are running a Windows Network with a Server and Domain, and you are using a Proxy Server for controlling access to Internet Services, then the SMTP address you enter in Pastoral Care is the Proxy Server name, (not an IP address). For example, if your proxy server is called AngelBaptist_Proxy then the SMTP address in Pastoral Care will be AngelBaptist_Proxy.

If you are not using proxy server as your internet access controller you can try any of the following settings for SMTP address:

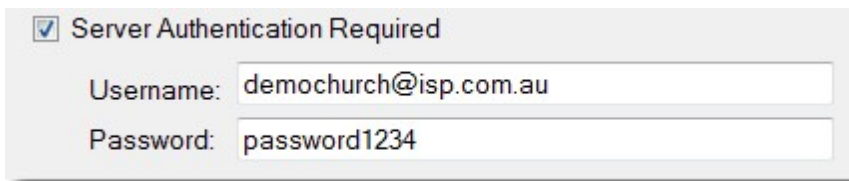
IP Address of your domain server (eg: 192.168.1.19)

Your Domain Name (angelbaptist.com.au)

Server Authentication

Not all email servers require authentication. Server Authentication is the process of sending an email address and password to the email server to say to the server: "Hi, you should know me, here is my credentials, please send the following emails for me..."

If you tick this option, you will need to fill in your email address (username) and your password. These two bits of information are supplied by your Internet Service Provider.



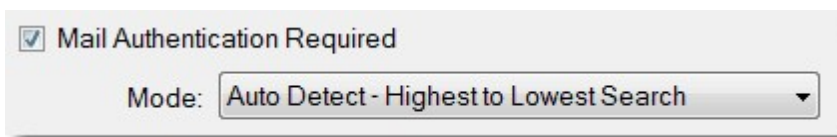
Server Authentication Required

Username:

Password:

Mail Authentication

Mail Authentication is a newer method of attempting to provide automated identification of non-spam messages. Some internet service providers are starting to adopt this requirement, however at present this is rarely used. We suggest an Auto Mode if this is required, however if you have the information from your ISP on what type of authentication is required, you can manually select it in the list.

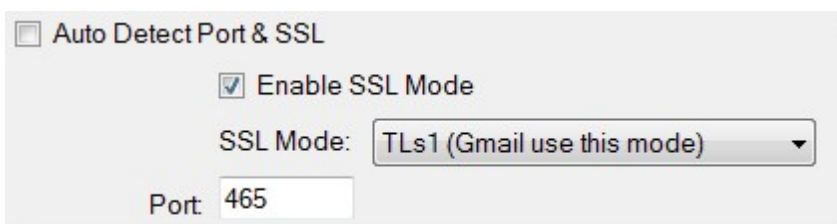


Mail Authentication Required

Mode:

PORT & SSL

We recommend using Auto Detect for the SSL and PORT settings. If you want to use GMAIL (Google Mail) as your SMTP email transmission service, the following settings should be entered in this area...



Auto Detect Port & SSL

Enable SSL Mode

SSL Mode:

Port:

Disable Chunking

ONLY tick this option if you are sending via a Microsoft Exchange Server, and recipients that are receiving your email via an exchange server also are receiving your message but it appears to be jumbled.

Your Details

Enter your email address that you want to be used as the sender (by default) and the name to be used as the sender.

Your Email Address:

Your Name:

Email Delay

To try and avoid being identified as a Spammer, setup an email delay here.

Activate Email Delay

After emails delay sending by Seconds

Individual Email Restriction

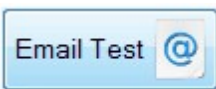
When sending emails, by default, Pastoral Care sends one email to one person, individually addressed. If you choose to from the various email sending locations in Pastoral Care, you can choose to send one email to many people all addressed together in the "To" field.

This setting will limit the number of "TO" people you can add to one email.

Individual Email 'To:' Restriction

Maximum amount of email addresses per email

Test Email



Press this button to manually send an email to test.

Update



Press this button to check for program updates from time to time. Updates are fast and simply to apply, simply press this button and follow the easy on screen prompts.

Pastoral Care 12

Pastoral tools for todays church.

Chapter 15

Pastoral Care Personal SMS



(c) 1988-2013 PASTORAL CARE MINISTRIES

A Free program that you can distribute to anyone!

For full details see...

[Introduction](#)

[Installing Personal SMS](#)

[Starting Personal SMS](#)

[Using Personal SMS](#)

Introduction

The Pastoral Care Personal SMS program is a free program that you can give away to your friends, family, church members etc. This program has no linking to the main Pastoral Care church database, it is entirely a free standalone program used for sending cheap SMS messages to your own personal contacts.

Installing Personal SMS

The Pastoral Care Personal SMS program is installed along with Pastoral Care by default. If you want to install this on other computers, you can either download it from our web site, or install it manually from the CD. The installation for this program can be found on the Pastoral Care CD under its own folder called Personal_SMS.

The files in this folder can be copied to say another CD, or a USB Flash Drive for distribution to other people. There is no additional charge for copying and using this program multiple times. Simply run the setup program found in the Personal_SMS Folder to install this on a Windows computer.

Starting Personal SMS

Find the Pastoral Care 12 folder on your desktop, and click the Resources Icon to start the Resource program. From there you can select the Personal SMS program and press the Launch button to run.

If the Resource program is not installed on your computer, look for the Personal SMS Icon on your desktop, or on your start menu.

Using Personal SMS

The basic steps for using Personal SMS are :

- Create your own person SMS account with www.msglobal.com.au
- Enter your account information into the setup area of Personal SMS
- Enter your contacts into Personal SMS
- Start sending messages whenever you want to!

Note this window is shown with some sample data loaded.



Click on each part of the Personal SMS window below to learn more about this program.

Phone Tag	Mobile Tag	Surname	Given	Phone	Mobile
<input type="checkbox"/>	<input type="checkbox"/>	Smith	Peter		0455666777
<input type="checkbox"/>	<input type="checkbox"/>	Smith	Helen		0455888999
<input type="checkbox"/>	<input type="checkbox"/>	Graham	Jon		0455888999
<input checked="" type="checkbox"/>	<input type="checkbox"/>	White	Heather	0399998888	0444666777

SMS Message
Enter your message here!

Return ID:

Smsglobal Status: **Unable to Establish Connection**

Current Message: Characters : 24 Txt Messages : 1

Account Details:
Credit Available : \$0.00
Txt's Available : 0
Cost per Txt:

Current Message:
Tagged : 1
Txt's to Send : 1
Cost : \$0.00

Scheduling:
 Enable SMS Scheduling
Daylight Saving
11:48 AM
Sunday, 13 January 2013

Toolbar



When you have selected the people to send a message to, press the Send button to send your message.



Save the current message as a template for re-use.



Load in a Saved message so you can send it again.



Show the details of the last 200 SMS messages sent.



Send a test SMS message. This will cost you for the test message as you are actually sending a TXT message via SMS global to a manually entered Mobile Phone Number



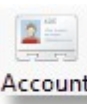
[See Contacts](#) for information on how to add people to the Personal SMS program



[See Security](#) for information on how to set up a password for this program.



[See Setup](#) for information on how to configure the Personal SMS program.



Press the Account button to load the SMS global web page where you can login to your SMS Global Account using your SMS Global Username and Password etc.



Press this button to check for program updates from time to time. Updates are fast and simply to apply, simply press this button and follow the easy on screen prompts.

Security

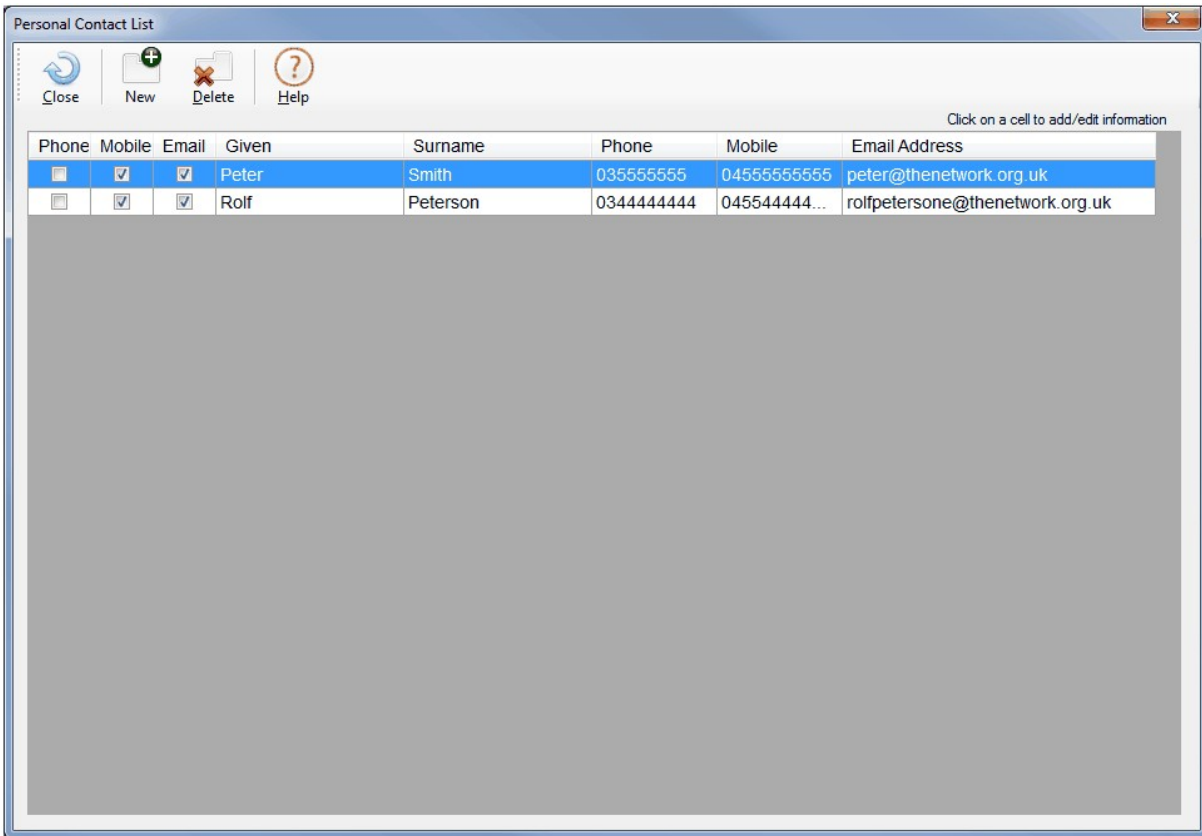


Turn Security on if you want to assign a password to restrict access to this program.

Please note, do NOT forget your password, it cannot be hacked in anyway.



Contacts





Use the Contacts feature to add your own contacts into the Communicator program. These people can also be sent SMS and Emails from this program.



Press New to add a new personal contact to the Communicator program.



Press Delete to remove the highlighted personal contact from the Communicator program.

Setup



Click on each part of the window below to learn more about the SMS setup area for Personal SMS. See also [How to Setup SMS](#) for more information.

The 'Setup' window contains the following fields and options:

- Country:** Radio buttons for Australia, New Zealand, and Other Country.
- User Name:** Text input field.
- Password:** Text input field.
- Default Return Mobile Number:** Text input field.
- Cost per Text:** Text input field with '8' and 'Cents' label.
- International Mobile Area Code:** Text input field with '61' and example text: 'Eg: Australia is 61, New Zealand is 64'.
- Local Area Code for Landline:** Text input field with example text: 'Eg: Vic/Tas is 03, NSW is 02 Qld is 07, other states are 08'.
- First two digits of mobile numbers:** Text input field with '04' and example text: 'Eg: Australia is 04, New Zealand is 02'.
- Notify when credit falls below \$:** Text input field with '10'.

At the bottom of the window are five buttons: **Help** (with a question mark icon), **SMS Test** (with an @ icon), **Create Account** (with a mobile phone icon), **Cancel** (with a left arrow icon), and **Close** (with a right arrow icon).

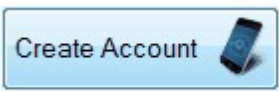
How to Setup SMS

For first time setup follow these simple steps.

1. Press the Create Account button in the SMS Setup Area.
2. A Web Page should open to www.msglobal.com
3. Select the link for New User
4. Complete the online application
5. SMS Global will send you your username in an email, and will send you a text message with your password
6. Complete the setup of Pastoral Care by entering in your account settings (username and password) into the SMS Configuration area.

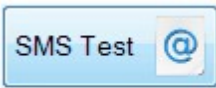
NOTE: At the time of publishing, www.msglobal.com.au were offering their accounts free of sign up costs, no ongoing account fees, and 25 free text messages to get you started. This can change without notice, but has been a standard account setup feature for many years.

Create SMS Account



Press this button to be taken to the SMS Global Web Site for creating an SMS Account.

Send a Test SMS



Press this button to allow you to quickly type a test message and send it to a manually entered mobile phone.

Country

Country: Australia
 New Zealand
 Other Country

Choose your country of origin. Your choice here is important to be certain of reliable message broadcasts. Each country has different features enabled, see the feature list below for full details.

Country

	TXT Message	TXT to VOICE	TXT to FAX
Australia	YES	YES	YES

New Zealand	YES	NO	NO
Other Country	YES	NO	NO

TXT Message

Standard 160 Character Text Message. You can send more than 160 characters in one message, however each 160 characters costs 1 text message charge,

TXT To Voice

Only available in Australia. If a person answers a Land Line number that a text message is being sent to, a computer generated voice will guide the person through the selection to hear the message.

TXT To Fax

If a Fax Machine answers a text message send, then the message will be converted to FAX

Account Settings

User Name:	<input type="text"/>	Password:	<input type="text"/>
Default Return Mobile Number:	<input type="text"/>	Cost per Text:	<input type="text" value="8"/> Cents

User Name

Enter your SMS GLOBAL user name for the default SMS Global Account

Password

Enter your SMS GLOBAL password for the default SMS Global Account

Default Return Mobile Number

Enter a return mobile phone number if you want people to be able to reply to your message.

Cost Per Text

Enter the current price that you have on offer from SMS global in cents per text. This setting is used so that Pastoral Care can estimate the cost of sending messages etc.

International Mobile Area Code

International Mobile Area Code:	<input type="text" value="64"/>
---------------------------------	---------------------------------

Enter your 2 digit country code for your International Mobile area code. If you are in Australia or New Zealand this field will be filled in for you.

Local Area Code

Local Area Code for Landline: Eg: Vic/Tas is 03, NSW is 02 Qld is 07, other states are 08

This field can only be filled in for Australia. Enter the Area Code for your state.

First Two Digits

First two digits of mobile numbers:

Enter the first 2 digit's that you use to send a text message or call a mobile phone in your country.

Notify

Notify when credit falls below \$

Enter an amount in Dollars to set a trigger for Pastoral Care to warn you that your account is going low.

Select People

Click on the Tag field to either include (ticked) people, or not include (un-ticked) people from receiving an SMS message.

Phone Tag	Mobile Tag	Surname	Given
<input type="checkbox"/>	<input type="checkbox"/>	Smith	Peter
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Smith	Helen
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Graham	Jon
<input checked="" type="checkbox"/>	<input type="checkbox"/>	White	Heather

Writing your message

When composing your message, you should be aware of the following:

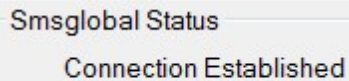
- Be wary of using too many short words like LOL etc. Depending on your audience, some might not understand these or mis-understand the message
- When using Given Name and Surname objects, because names can be of a large range of varying lengths, some of the single text messages you think you are sending may be 2 messages in length costing you more to send

SMS Message

Hi [Given], just a quick note to remind you about the special Members meeting on Thursday night.

SMS Global Status

This area shows you the status of the connection to SMS Global. Connection Established means that Pastoral Care is able to send SMS messages. If you get any errors here, you may need to check your settings in the settings area of Personal SMS, or login to your account at www.smsglobal.com and check that everything is setup as needed there.



Smsglobal Status
Connection Established

Scheduling

When to tick the Scheduling option, all SMS messages tagged for sending in the current session will be sent at the scheduled time.

How Does Scheduling Work?

It is important to note that Pastoral Care does not handle the scheduling of the SMS messages in that you do not need to leave your computer on to send messages at the allocated date and time. Once the SMS messages have been sent to the SMS Queue, and subsequently dispatched to SMS Global for delivery to the the actual phone, the messages sit at SMS Global until the allocated date and time, and then if there is enough credit in your account to send the messages, they will be delivered.

Time Zones

If you are sending all messages to people in the same time zone, then the date and time shown in the Scheduling area is the date and time the message will be sent. If some people are not in your current time zone, please have consideration for when the message might arrive!

Daylight Saving

Press the Daylight Saving button to confirm Melbourne Time as the SMS Servers used to send the message all run on Melbourne Time. The time on the Daylight Saving window should be the same time as Melbourne Time (Australian Eastern Standard Time). Remember that the TIME set in scheduling is your local time set on your computer in your time zone!

Payment for Scheduled Messages

After Scheduling some SMS messages, you are committed to these being sent. Once the message have left the Personal SMS program and have arrived at SMS Global, they will be dispatched at the allocated date and time. At the time of sending, you must have enough account funds to cover the messages being sent, or they will fail.

Scheduling

Enable SMS Scheduling

02:51 PM

Daylight Saving

Saturday, 12 January 2013

Current Message

This area shows the number of people tagged to receive the composed message, and the cost estimates based on your account setup and cost per SMS you have entered in the SMS Setup area.

Current Message

Tagged : 108

Txt's to Send : 108

Cost : \$8.64

Account Details

This area shows you the current SMS Global account balance and how many SMS messages you can send on your current balance.

Account Details

Credit Available : \$30.16

Txt's Available : 377

Estimate Cost : \$0.08

Given



Insert the Given Name of the recipient in the message. This is ideal for personalising each message.

Surname



Insert the Surname of the recipient in the message. This is ideal for personalising each message.

Clear



Erase the currently composed message.

Spell



Access the Spell Checker Settings

Pastoral Care 12

Pastoral tools for todays church.

Chapter 16

Pastoral Care Directory



(c) 1988-2013 PASTORAL CARE MINISTRIES

A Free program that you can distribute to anyone!

For full details see...

[Introduction](#)

[Installing Directory](#)

[Starting Directory](#)

[Using Directory](#)

Introduction

The Pastoral Care Directory program is a small Take Home address book that can be loaded onto as many computers as you have members or attendees.

Pastoral Care can export data into a secure portable format that can be easily imported into this free program to provide people with an electronic address book at home.

You can use filters to only export the people you want to include in the directory. This export process is done via the main Pastoral Care program, check out the Export feature on the Explore tab for export options for this program to utilise.

Installing Directory

The Pastoral Care Directory program is installed along with Pastoral Care by default. If you want to install this on other computers, you can either download it from our web site, or install it manually from the CD. The installation for this program can be found on the Pastoral Care CD under its own folder called Directory.

The files in this folder can be copied to say another CD, or a USB Flash Drive for distribution to other people. There is no additional charge for copying and using this program multiple times. Simply run the setup program found in the Directory Folder to install this on a Windows computer.

Starting Directory

Find the Pastoral Care 12 folder on your desktop, and click the Resources Icon to start the Resource program. From there you can select the Directory program and press the Launch button to run.

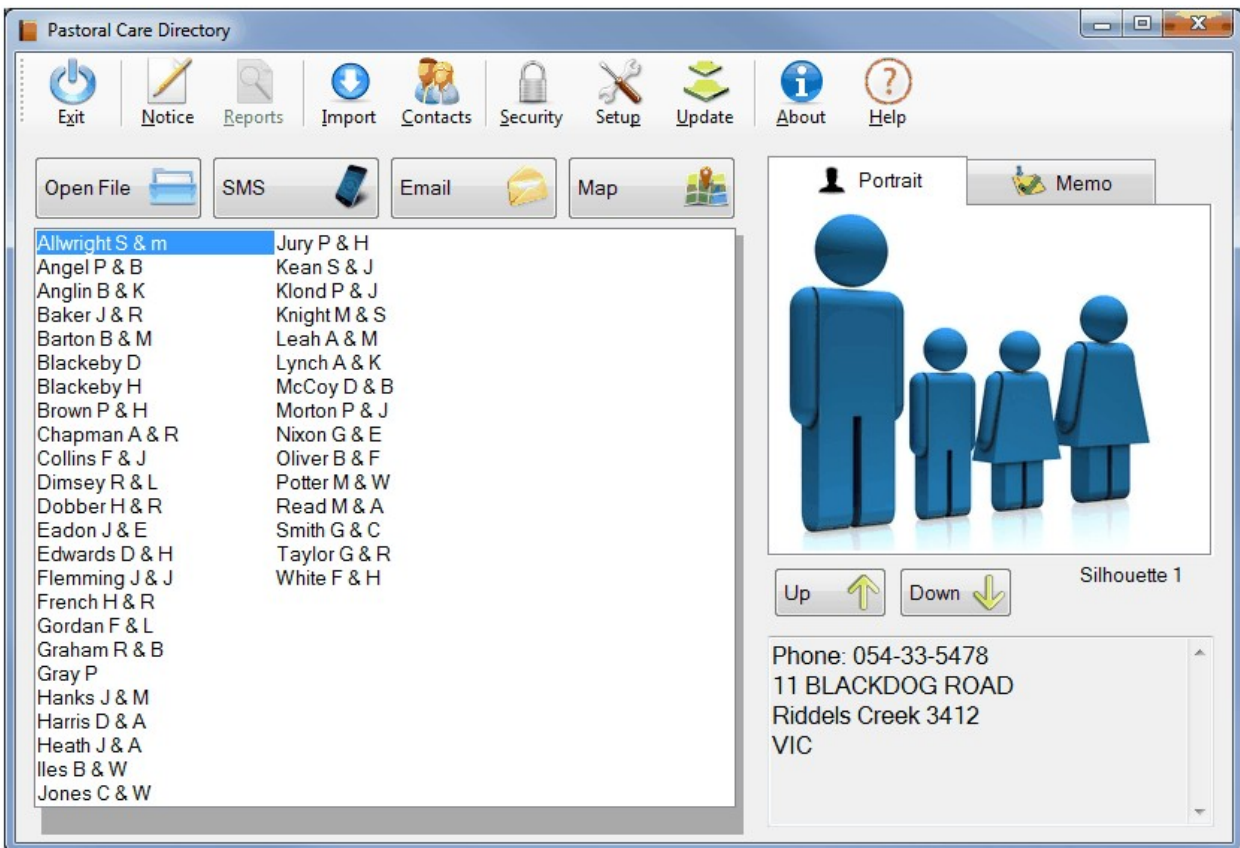
If the Resource program is not installed on your computer, look for the Directory Icon on your desktop, or on your start menu.

Using Directory

As the Directory Program is designed as an electronic copy of your church directory, you should make certain that you control the creation and distribution of the information file in relation to Privacy Laws and permission issues. We suggest that you create a status in Pastoral Care called DirectoryOk, and assign people who wish to be in the directory to this status group.



Shown below is the Directory Program main window, click on each part of this window to learn more.



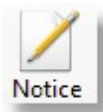
Toolbar



Click on each toolbar icon below to learn more about each feature in the Directory program Toolbar.

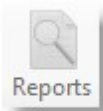


Notice



Press this button to see a Church Notice that has been distributed to the Directory Program via the Pastoral Care directory Export.

Reports



Press this button to see a Church Notice that has been distributed to the Directory Program via the Pastoral Care directory Export.

Import



Press this button to import an updated family data file from the church's main Pastoral Care computer.

Contacts



Press the Contacts Icon to open the Contacts Page. From here, you can add your own personal contacts that may not have been imported from your church.

Add a new Contact

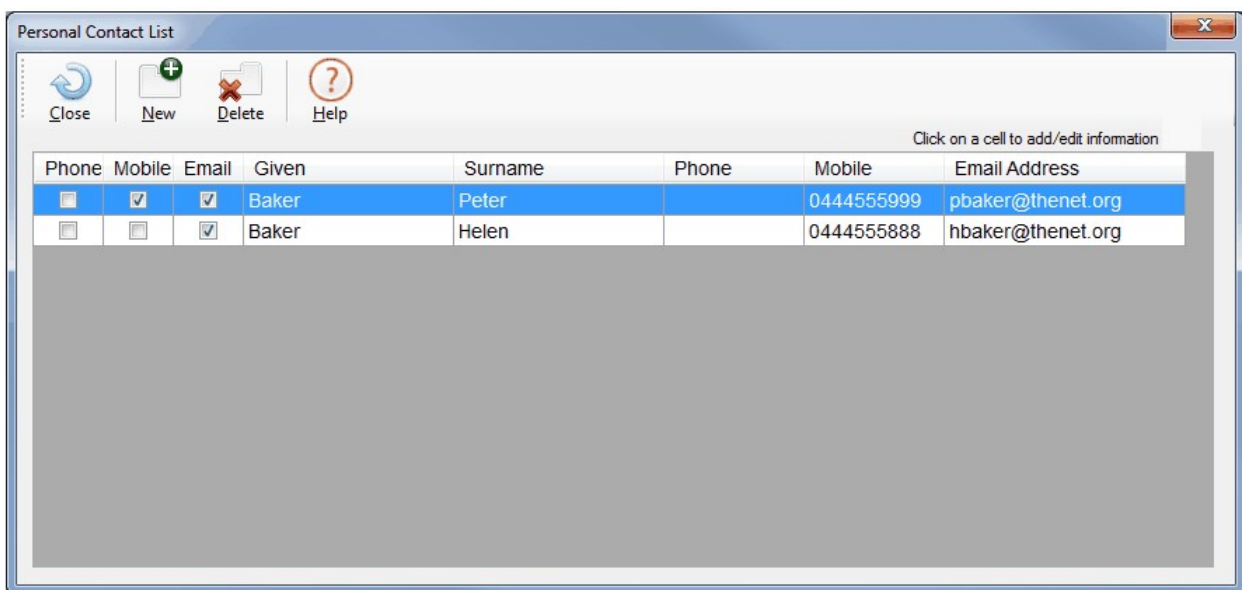
To add a new contact, press New, and click in each field to add data. Information is saved automatically.

Delete Contact

Simply select your contact and press the Delete button

Phone Mobile and Email

Tick which fields you want to activate for communication methods.



Security



Turn Security on if you want to assign a password to restrict access to this program.

Please note, do NOT forget your password, it cannot be hacked in anyway.



Setup



There are 3 setup areas for the Directory Program.

SMS Setup

Setup your own personal SMS account for using cheap SMS services with the Directory Program.

[See SMS Setup](#) for information on this

Email Setup

Setup your own person Email settings for sending Email to your church and other contacts.

[See Email Setup](#)

Mapping Setup

Setup your preferences for a web based Mapping feature, showing you where people live!

[See Mapping / Format Setup](#) for more information.

SMS Setup



Click on each part of the window below to learn more about the SMS setup area for Communicator. See also [How to Setup SMS](#) for more information.

Setup

SMS Setup

Create Account

Country: Australia
 New Zealand
 Other Country

User Name: Password:

Default Return Mobile Number: Cost per Text: Cents

International Mobile Area Code: Eg: Australia is 61, New Zealand is 64

Local Area Code for Landline: Eg: Vic/Tas is 03, NSW is 02 Qld is 07, other states are 08

First two digits of mobile numbers: Eg: Australia is 04, New Zealand is 02

Notify when credit falls below \$

Help SMS Test Email Test Cancel Close

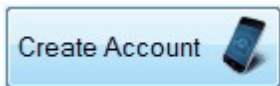
How to Setup SMS

For first time setup follow these simple steps.

1. Press the Create Account button in the SMS Setup Area.
2. A Web Page should open to www.msglobal.com
3. Select the link for New User
4. Complete the online application
5. SMS Global will send you your username in an email, and will send you a text message with your password
6. Complete the setup of Pastoral Care by entering in your account settings (username and password) into the SMS Configuration area.

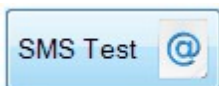
NOTE: At the time of publishing, www.msglobal.com.au were offering their accounts free of sign up costs, no ongoing account fees, and 25 free text messages to get you started. This can change without notice, but has been a standard account setup feature for many years.

Create SMS Account



Press this button to be taken to the SMS Global Web Site for creating an SMS Account.

Send a Test SMS



Press this button to allow you to quickly type a test message and send it to a manually entered mobile phone.

Country

Country: Australia
 New Zealand
 Other Country

Choose your country of origin. Your choice here is important to be certain of reliable message broadcasts. Each country has different features enabled, see the feature list below for full details.

Country	TXT Message	TXT to VOICE	TXT to FAX
Australia	YES	YES	YES
New Zealand	YES	NO	NO
Other Country	YES	NO	NO

TXT Message

Standard 160 Character Text Message. You can send more than 160 characters in one message, however each 160 characters costs 1 text message charge,

TXT To Voice

Only available in Australia. If a person answers a Land Line number that a text message is being sent to, a computer generated voice will guide the person through the selection to hear the message.

TXT To Fax

If a Fax Machine answers a text message send, then the message will be converted to FAX

Account Settings

User Name:	<input type="text"/>	Password:	<input type="text"/>
Default Return Mobile Number:	<input type="text"/>	Cost per Text:	<input type="text" value="8"/> Cents

User Name

Enter your SMS GLOBAL user name for the default SMS Global Account

Password

Enter your SMS GLOBAL password for the default SMS Global Account

Default Return Mobile Number

Enter a return mobile phone number if you want people to be able to reply to your message.

Cost Per Text

Enter the current price that you have on offer from SMS global in cents per text. This setting is used so that Pastoral Care can estimate the cost of sending messages etc.

International Mobile Area Code

International Mobile Area Code:	<input type="text" value="64"/>
---------------------------------	---------------------------------

Enter your 2 digit country code for your International Mobile area code. If you are in Australia or New Zealand this field will be filled in for you.

Local Area Code

Local Area Code for Landline:	<input type="text"/>	Eg: Vic/Tas is 03, NSW is 02 Qld is 07, other states are 08
-------------------------------	----------------------	---

This field can only be filled in for Australia. Enter the Area Code for your state.

First Two Digits

First two digits of mobile numbers:	<input type="text" value="04"/>
-------------------------------------	---------------------------------

Enter the first 2 digit's that you use to send a text message or call a mobile phone in your country.

Notify_3

Notify when credit falls below \$	<input type="text" value="10"/>
-----------------------------------	---------------------------------

Enter an amount in Dollars to set a trigger for Pastoral Care to warn you that your account is going low.

Email Setup



Click on each part of the window below to learn more about the Email setup area for Communicator.

SMTP Server

SMTP Server: smtp.gmail.com

Common SMTP settings

The most common SMTP server name is the one provided by your ISP (Internet Service Provider)

Some Examples:

- smtp.hotmail.com
- mail.bigpond.com
- mail.iinet.net.au
- etc

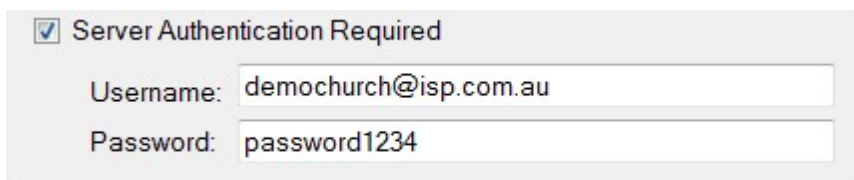
Your Own Email Server

If you are unsure of the settings for here, have a look at the SMTP server setting for the email program you use on a home computer. That will be the one you should use.

Server Authentication

Not all email servers require authentication. Server Authentication is the process of sending an email address and password to the email server to say to the server: "Hi, you should know me, here is my credentials, please send the following emails for me..."

If you tick this option, you will need to fill in your email address (username) and your password. These two bits of information are supplied by your Internet Service Provider.



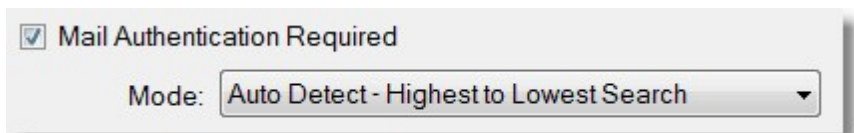
Server Authentication Required

Username:

Password:

Mail Authentication

Mail Authentication is a newer method of attempting to provide automated identification of non-spam messages. Some internet service providers are starting to adopt this requirement, however at present this is rarely used. We suggest an Auto Mode if this is required, however if you have the information from your ISP on what type of authentication is required, you can manually select it in the list.

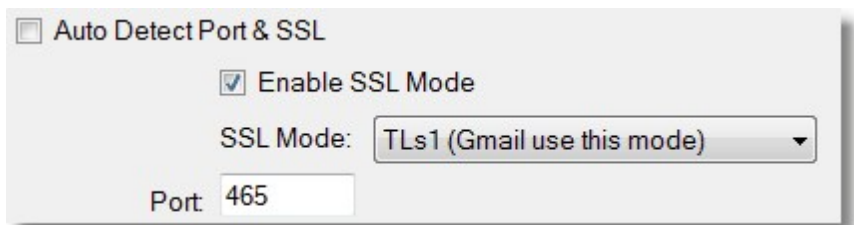


Mail Authentication Required

Mode:

PORT & SSL

We recommend using Auto Detect for the SSL and PORT settings. If you want to use GMAIL (Google Mail) as your SMTP email transmission service, the following settings should be entered in this area...



Auto Detect Port & SSL

Enable SSL Mode

SSL Mode:

Port:

Disable Chunking

ONLY tick this option if you are sending via a Microsoft Exchange Server, and recipients that are receiving your email via an exchange server also are receiving your message but it appears to be jumbled.

Your Details

Enter your email address that you want to be used as the sender (by default) and the name to be used as the

sender.

Your Email Address:	<input type="text" value="the_church_office@ourdomain.com"/>
Your Name:	<input type="text" value="The Church Office"/>

Email Delay

To try and avoid being identified as a Spammer, setup an email delay here.

<input checked="" type="checkbox"/> Activate Email Delay
After <input type="text" value="20"/> emails delay sending by <input type="text" value="30"/> Seconds

Email Queue

All email in Pastoral Care is now managed by a separate program called the Email Queue. You don't have to start this, it starts automatically. When using Email Delay, all emails are sent from Pastoral Care, immediately to the Queue program. This frees up Pastoral Care and your computer for doing other things without taking over the computer while emails are being transmitted. The Queue program will take all of the settings for email, including the Email Delay settings, and send them out as directed.

[See Email Queue](#) for more information on this feature.

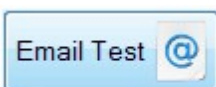
Individual Email Restriction

When sending emails, by default, Pastoral Care sends one email to one person, individually addressed. If you choose to from the various email sending locations in Pastoral Care, you can choose to send one email to many people all addressed together in the "To" field.

This setting will limit the number of "TO" people you can add to one email.

<input checked="" type="checkbox"/> Individual Email 'To:' Restriction
Maximum amount of email addresses per email <input type="text" value="100"/>

Test Email



Press this button to manually send an email to test.

Mapping / Format Setup

Pastoral Care offers you direct linking to a popular web based Satellite and Mapping feature. This can display people's address information as a map giving you accurate location information.

Fill in you Country and State for increased accuracy.

Address Format

Select which country you are in for correct Address Display formats.

Mapping...

To access maps over the internet you are required to enter your country and state.
If you are in a country that doesn't have a state or province then leave the state field blank.

Country

State

Address Format...

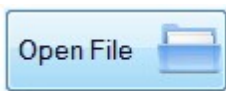
Australian New Zealand

Update



Press this button to check for program updates from time to time. Updates are fast and simply to apply, simply press this button and follow the easy on screen prompts.

Open File



Press the Open File button to open the selected church family to see further information.

You can view all the information that has been exported from the church for this family, and use the [SMS](#), [Email](#) and [Map](#) buttons on the toolbar for more interaction with this family.

Family View (Allwright)

Close Previous Find Next SMS Mail Map Help

Surname: Allwright

Phone: 054-33-5478

Up ↑ Down ↓

Silhouette 1

Adult: Stevo, maz

Child:

Stevo's Personal Details

Gender: Male
Title: Mr.
Birth Date: 03/07/1945
Mobile: 0400297025
Email: stephen@spirit.com.au

Family Contact details

Family Email: stevo@hotmail.net.au
Family Mobile: 0444-555-555

Address

Home Address-

11 BLACKDOG ROAD
Riddels Creek 3412
VIC

SMS

Use the SMS window for SMS messages to people on your directory. Note, from this window, you can send to Family Contacts (Church people!) or Personal Contacts (People you have added to the Directory program)



Click on each part of the window below to learn more about this feature.

Tag	Surname	Given	Phone Type	Phone
<input type="checkbox"/>	Allwright Family		Family Mobile	0444-555-555
<input type="checkbox"/>	Allwright Family		Family Phone	054-33-5478
<input type="checkbox"/>	Allwright	Stevo	Personal Mobile	0400297025
<input type="checkbox"/>	Allwright	maz	Personal Mobile	041234567890

SMS Message Include Family Contact Include 'Personal Contacts'

Return ID:

Account Details:
 Credit Available : \$0.00
 Txt's Available : 0
 Cost per Txt : \$0.00

Smsglobal Status: **Unable to Establish Connection**

Current Message:
 Tagged : 1
 Txt's to Send : 0
 Cost : \$0.00

Scheduling:
 Enable SMS Scheduling
 08:28 PM
 Tuesday, 15 January 2013

Toolbar



When you are ready, press the Send button to send your entered message to the selected People



Insert the Given Name of the recipient in the message. This is ideal for personalising each message.



Insert the Surname of the recipient in the message. This is ideal for personalising each message.



Erase the currently composed message.



Access the Spell Checker Settings



Save the current message as a template for re-use.



Load in a Saved message so you can send it again.



Show the details of the last 200 SMS messages sent.

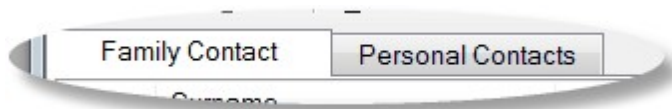


Send a test SMS message. This will cost you for the test message as you are actually sending a TXT message via SMS global to a manually entered Mobile Phone Number



Press the Account button to load the SMS global web page where you can login to your SMS Global Account using your SMS Global Username and Password etc.

Lists and Contacts



Select Family Contacts or Personal Contacts for sending SMS messages to.

Select People

Click on the Tag field to either include (ticked) people, or not include (un-ticked) people from receiving an SMS message.

Tag	Surname	Given	Phone Type	Phone
<input type="checkbox"/>	Allwright Family		Family Mobile	0444-555-555
<input type="checkbox"/>	Allwright Family		Family Phone	054-33-5478
<input type="checkbox"/>	Allwright	Stevo	Personal Mobile	0400297025
<input type="checkbox"/>	Allwright	maz	Personal Mobile	041234567890

Include

Include Family Contact Include 'Personal Contacts'

Tick both of these options to allow you to choose from both personal Contacts, and people from Pastoral Care lists for sending an SMS to.

Writing your message

When composing your message, you should be aware of the following:

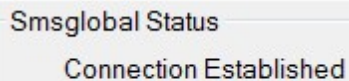
- Be wary of using too many short words like LOL etc. Depending on your audience, some might not understand these or mis-understand the message
- When using Given Name and Surname objects, because names can be of a large range of varying lengths, some of the single text messages you think you are sending may be 2 messages in length costing you more to send

SMS Message

Hi [Given], just a quick note to remind you about the special Members meeting on Thursday night.

SMS Global Status

This area shows you the status of the connection to SMS Global. Connection Established means that Pastoral Care is able to send SMS messages. If you get any errors here, you may need to check your settings in the settings area of Communicator, or login to your account at www.msglobal.com and check that everything is setup as needed there.



Smsglobal Status
Connection Established

Scheduling

When to tick the Scheduling option, all SMS messages tagged for sending in the current session will be sent at the scheduled time.

How Does Scheduling Work?

It is important to note that Pastoral Care does not handle the scheduling of the SMS messages in that you do not need to leave your computer on to send messages at the allocated date and time. Once the SMS messages have been sent to the SMS Queue, and subsequently dispatched to SMS Global for delivery to the the actual phone, the messages sit at SMS Global until the allocated date and time, and then if there is enough credit in your account to send the messages, they will be delivered.

Time Zones

If you are sending all messages to people in the same time zone, then the date and time shown in the Scheduling area is the date and time the message will be sent. If some people are not in your current time zone, please have consideration for when the message might arrive!

Daylight Saving

Press the Daylight Saving button to confirm Melbourne Time as the SMS Servers used to send the message all run on Melbourne Time. The time on the Daylight Saving window should be the same time as Melbourne Time (Australian Eastern Standard Time). Remember that the TIME set in scheduling is your local time set on your computer in your time zone!

Payment for Scheduled Messages

After Scheduling some SMS messages, you are committed to these being sent. Once the message have left the Directory Program and have arrived at SMS Global, they will be dispatched at the allocated date and time. At the time of sending, you must have enough account funds to cover the messages being sent, or they will fail.

Scheduling

Enable SMS Scheduling

02:51 PM

Daylight Saving

Saturday, 12 January 2013

Current Message

This area shows the number of people tagged to receive the composed message, and the cost estimates based on your account setup and cost per SMS you have entered in the SMS Setup area.

Current Message

Tagged : 108

Txt's to Send : 108

Cost : \$8.64

Account Details

This area shows you the current SMS Global account balance and how many SMS messages you can send on your current balance.

Account Details

Credit Available : \$30.16

Txt's Available : 377

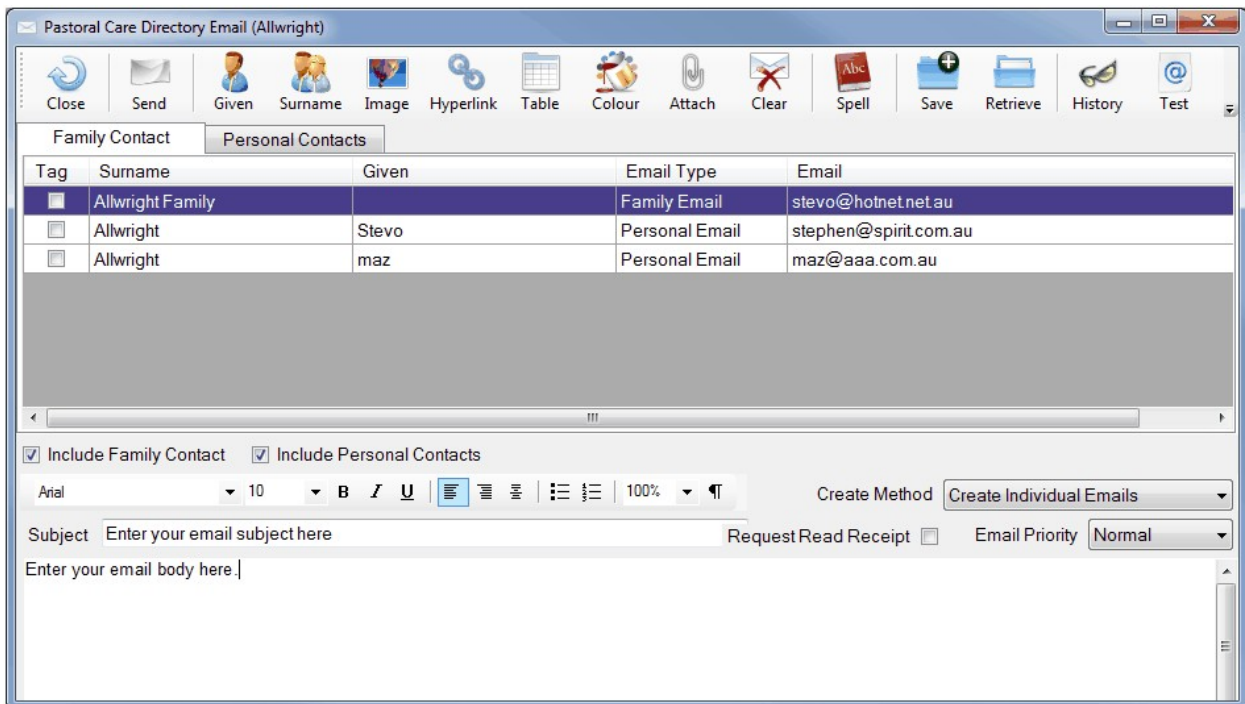
Estimate Cost : \$0.08

Email

Use the Email window for composing and sending email messages to people on your directory. Note, from this window, you can send to Family Contacts (Church people!) or Personal Contacts (People you have added to the Directory program)



Click on each part of the window below to learn more about this feature.



Toolbar

Shown below are each of the Toolbar items on the Compose Email area of The Email Manager,



Press Send to send the currently composed SMS message to the selected people.



Erase the contents of the currently composed email.



Insert a field for a person's Given Name to be used in the email.



Access the Spell Checker Settings



Insert a field for a person's Surname to be used in the email.



Save an email as a template for later re-use. Rather like a permanent draft copy that you can re-use over and over again.



Insert an Image into the email. See [Image](#) for more details on this.



Load in a saved email for use. Naturally the loaded email can be edited and changed if required.



Insert text as a Hyperlink into the email. See [Hyperlink](#) for more details.



Press the History button to see the last 200 emails sent using this program.



Insert a Table into the email. Tables are ideal for laying out an email with just the way you want to see it. Table borders can be transparent giving to the ability to place text and graphics in specific locations.



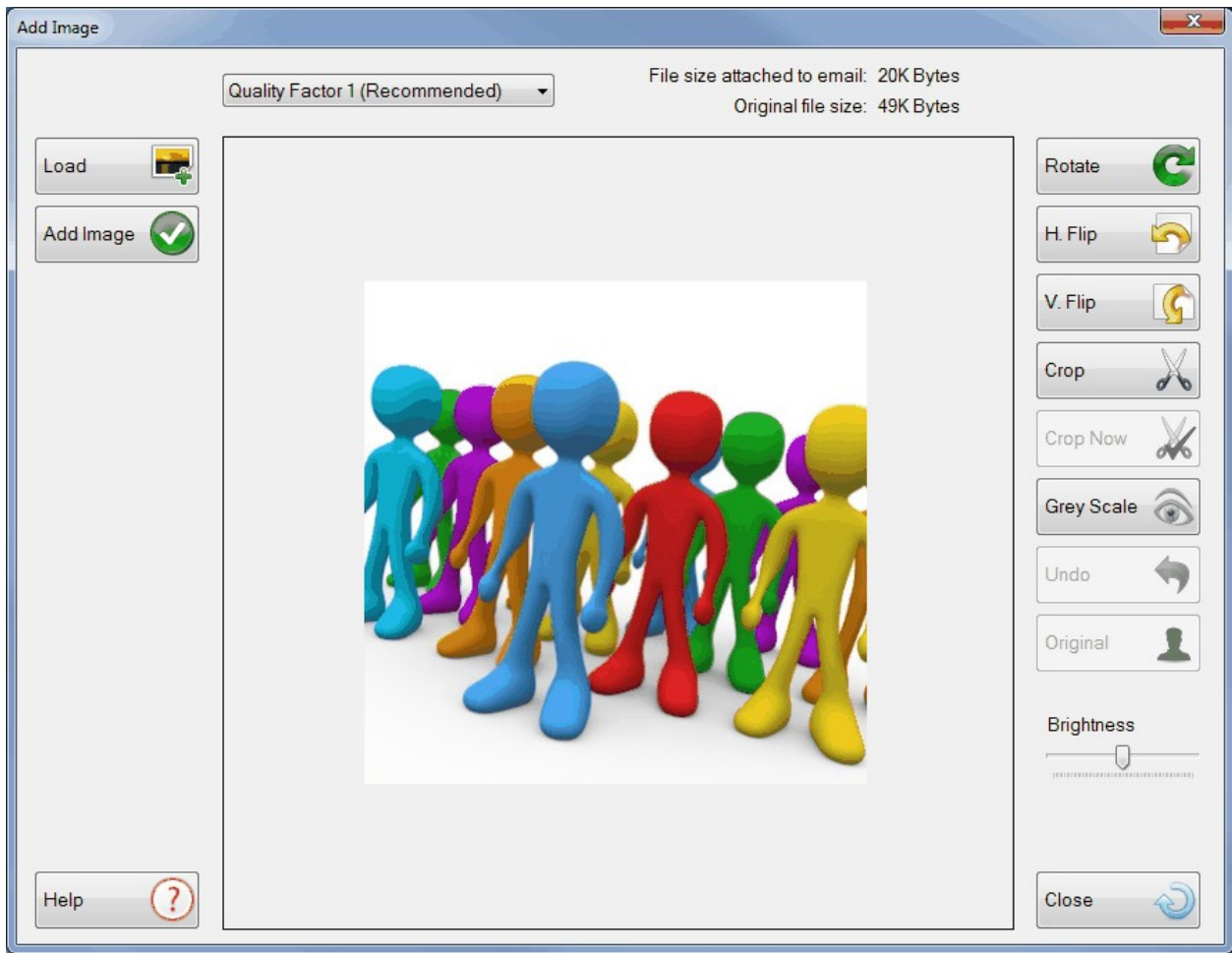
Manually send the composed email to an email address you enter to try out your email.



Set the colour of your text or background of text to any colour you desire!

Image

Click on each part of the Add Image box below to learn more about adding an image to an email. Note, once an image has been added to an email, you can select and re-size the image from the email itself before sending it out.

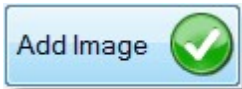


Load



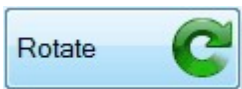
Load an image from a file to be added to the email.

Add Image



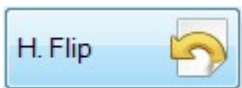
Add the selected (and modified if you have done any modifications) image to the current position in the email. Note once an image has been added, you can re-size the image directly in the email using the mouse to click and drag the corners of the image.

Rotate



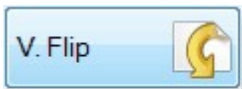
Rotate the image 90 Degrees to the right. Keep pressing this to continue the rotation in 90 degree steps.

H Flip



Flip the picture (mirror) horizontally.

V Flip



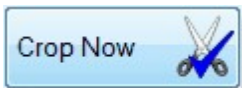
Flip the picture (mirror) vertically.

Crop



Select an area of the picture to crop.

Crop Now



After marking an area with Crop, press the Crop Now button to complete the crop.

Grey Scale



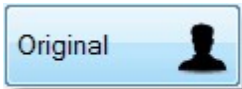
Convert the picture to grey tones only.

Undo



Where available, you can press this to undo the last edit to the picture.

Original



Use this to reload the original picture and discard all of your changes.

Brightness



Adjust the brightness of the picture.

Quality Factor



We recommend a Quality Factor of 1 for most images for an email. The original and projected file save size is shown next to the Quality Factor Selection.

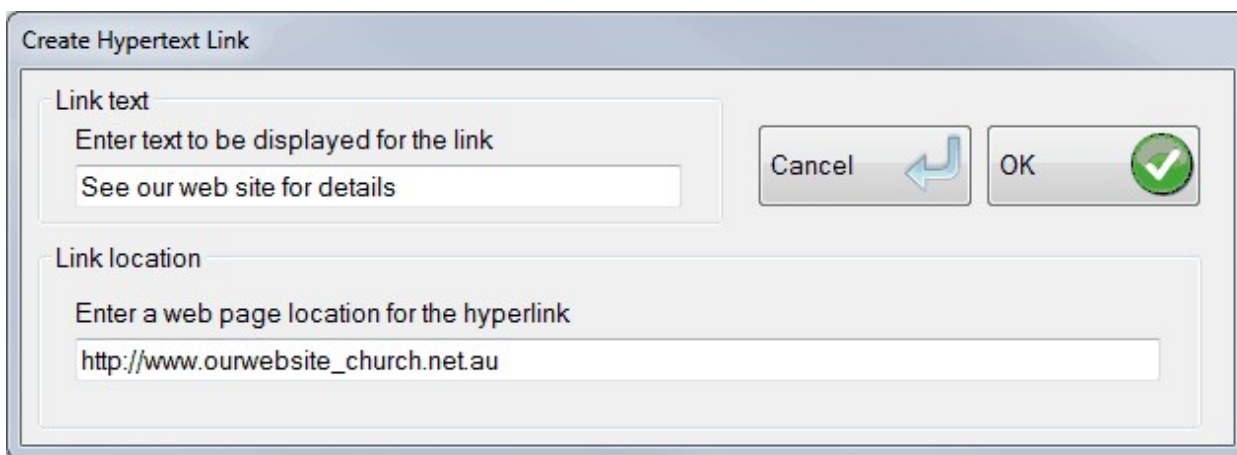
Image Preview



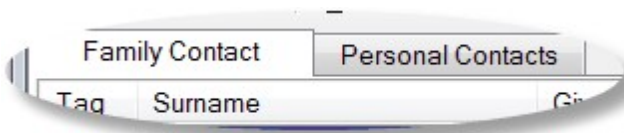
This shows a preview of the selected image to be inserted in the email.

Hyperlink

Type in some text for the display of the hyperlink, and the web site address that you want to load when the hyperlink is clicked in the email.



Family and Contacts



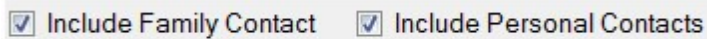
Use the Family Contacts option to select people from Pastoral Care, and use the Personal Contacts option to select people from the contacts you have entered into Directory yourself.

Select People

Click on the Tag field to either include (ticked) people, or not include (un-ticked) people from receiving an Email message.

Tag	Surname	Given
<input checked="" type="checkbox"/>	Allwright	maz
<input checked="" type="checkbox"/>	Angel	Peter
<input checked="" type="checkbox"/>	Anglin	Brent
<input checked="" type="checkbox"/>	Anglin	Katey
<input checked="" type="checkbox"/>	Anglin	Mathew
<input checked="" type="checkbox"/>	Anglin	Levi
<input checked="" type="checkbox"/>	Anglin	Kerryn

Include



Tick both of these options to allow you to choose from both personal Contacts, and people from Pastoral Care for sending an Email to.

Writing your message

Use the Subject field to enter a subject for your email and enter the body of the email below that.

The following standard font options can be used to adjust highlighted / selected text.



Subject

Enter your Email here, you can include [Given] and [Surname] objects for personalising your message.

Tips for composing emails.

Try and keep your Images small if using an image. Don't forget that the Table object can be used to help layout of the email, this is particularly useful for placement of images.

Create Method

Select any of the create methods that suit your needs.

Create Method

- Create Individual Emails
- Add 'Address' to the 'To' Field
- Add 'Address' to the 'Bcc' Field

Individual Emails

This is the default option. This options sends one email to each person, personally addressed. This keeps all address information to all recipients private and confidential. This also takes the longest time, and uses the most internet usage, which may be a factor if you are sending an image or attachment with the email.

Note: If you want to send **personalised** emails using the Given Name and Surname objects, you **MUST** select Individual Emails for this feature to work!

Add Address to the To Field

This option groups all the address information onto the TO: field, allowing everyone to see each others address information. This can be useful for selected email types where you intentionally want to reveal email address data to all recipients. Using this feature saves on email sending time, and on internet usage as only one email is sent.

Add Address to the BCC field

This option groups all the address information onto the BCC: field, allowing Pastoral Care to send one email, but to hide all of the copied or included address information. This can be useful for selected email types where you want to hide all email address data, and not use a personal email therefore saving on Time and Internet Usage.

Email Options

Request Read Receipt Email Priority

Read Receipt

Tick this option for a read receipt to be sent back to the email address setup in the Directory Setup area.

Email Priority

Set the priority for the email to be sent as. This does not affect how fast the email is delivered, it can affect the display of emails in compliant email programs to show high priority emails in a different colour in the inbox.

Map



Press the Map button to load a popular web based mapping program with a person's address highlighted.

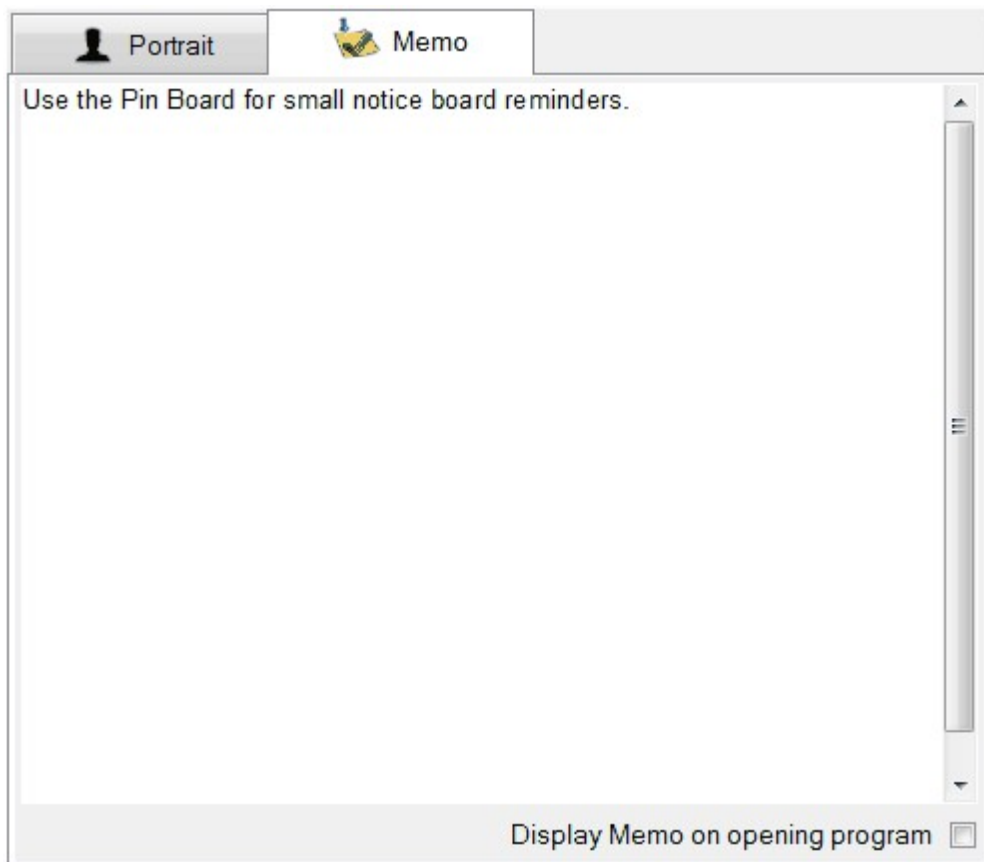
Portrait

The Portrait area shows a photo of the selected person / family. This will only display a photo if they have been included in the export file from your church.



Memo

The memo area shows what is called a Pin Memo as a small message from your church.



Pastoral Care 12

Pastoral tools for todays church.

Chapter 17

External Backup Program



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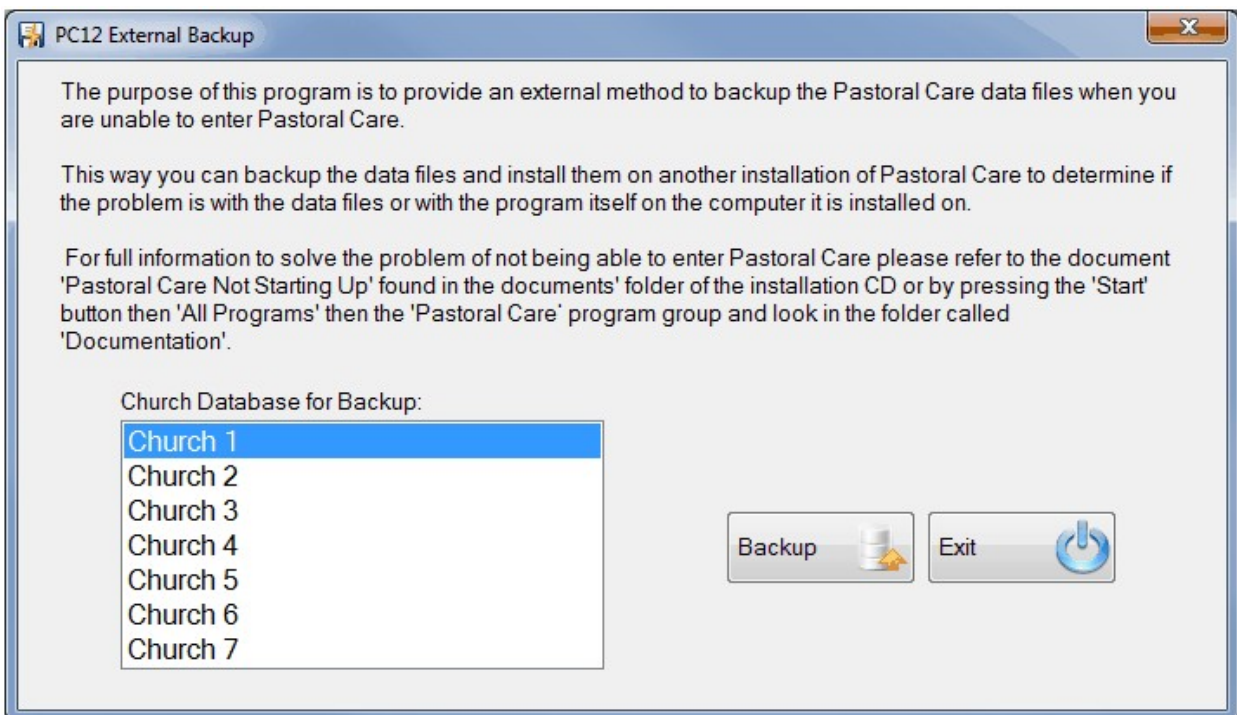
The External Backup Program is an important program designed to assist you in getting a backup of your data even when Pastoral Care won't start. This is not a very common problem that we expect you to have, however, if for some reason, Pastoral Care becomes un-usable, you can use this program to create a backup of your data so you can either send that data to us for assistance, or restore it on another computer.

Starting the External Backup Program

Find the Pastoral Care 12 folder on your desktop, and click the Resources Icon to start the Resource program. From there you can select the External Backup Program and press the Launch button to run.

Using the External Backup Program

Simply select the church database to backup, and press the Backup Button, then select the location to place the ZIP file.



Pastoral Care 12

Pastoral tools for todays church.

Chapter 18

External Restore Program



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The External Restore Program is an important program designed to assist you in restoring a backup of your data even if you can not get into Pastoral Care. This is not a very common problem that we expect you to have, however, if for some reason, Pastoral Care becomes un-usable, you can use this program to restore an earlier backup of your data so you can try to get back into Pastoral Care again.

Important Notice

BEFORE doing a restore of this type (or any restore for that matter) always do a backup first, in case you are making a problem worse by restoring data that is too old, or potentially damaged in some unexpected way!

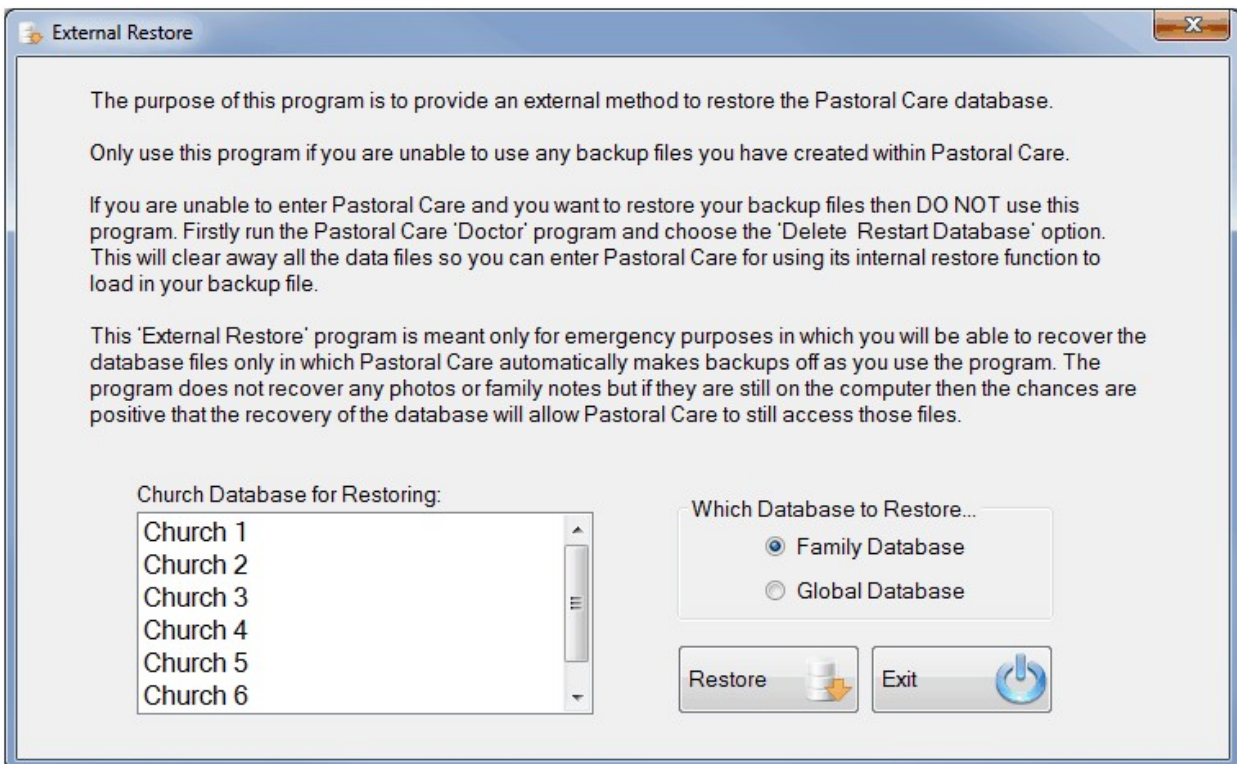
Starting the External Restore Program

Find the Pastoral Care 12 folder on your desktop, and click the Resources Icon to start the Resource program. From there you can select the External Restore Program and press the Launch button to run.

Using the External Restore Program

Simply select the church database to restore, and press the Restore Button. Pastoral Care will RESTORE ITS OWN EMERGENCY backup of your information. This process completely removes all existing information from the selected church for restoring, and it will restore its most recent OWN backup of your data. It is extremely important that you have other backups before doing this procedure, as this procedure may produce unexpected results.

If you need to restore a Global Database (That is the settings in Pastoral Care), select the Global Database option and press Restore. Pastoral Care will RESTORE ITS OWN EMERGENCY backup of your global settings. This process completely removes all existing setup information from the selected church for restoring, and it will restore its most recent OWN backup of those settings. It is extremely important that you have other backups before doing this procedure, as this procedure may produce unexpected results.



Pastoral Care 12

Pastoral tools for todays church.

Chapter 19

Conversion Utility



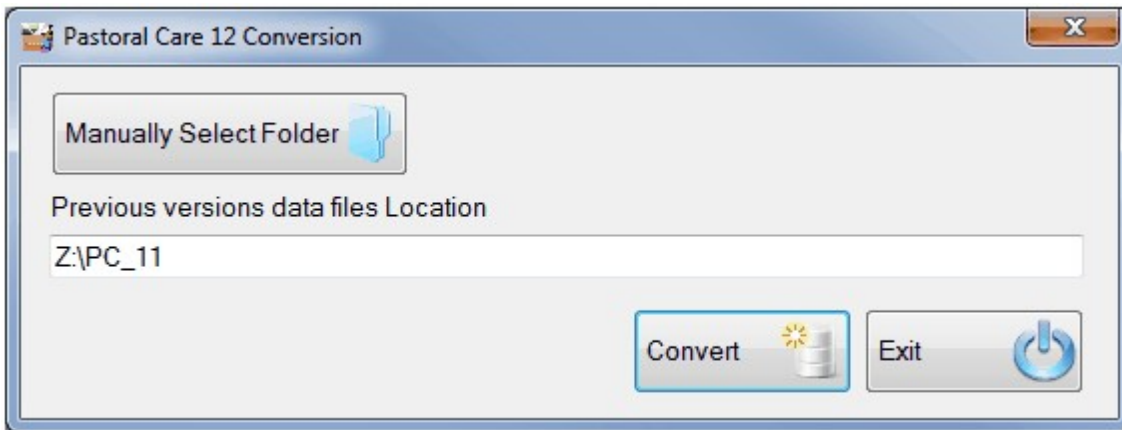
(c) 1988-2013 PASTORAL CARE MINISTRIES

The conversion program lets you convert your information from previous versions of Pastoral Care. Versions supported for database conversion are:

Pastoral Care 9re, Pastoral Care 10 and Pastoral Care 11

The conversion program will not be able to convert Custom Reports, or Custom Letters.

After launching the program, the following window will appear showing you where the program has found your information from a previous version. If this incorrect, please use the Manually Select Folder option to let you browse to your folders that have your Pastoral Care data in them.



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