

# Pastoral Care 13 New Features

## Intro

The previous version of Pastoral Care was a completely rebuilt edition with the purpose in mind of creating a new foundation in the latest technology so that future editions can push forward to where Pastoral Care has never been.

Pastoral Care 13 is a significant edition with major new areas that has achieved this goal.

## Major New Features...

### Dashboard

Driving a car without a dashboard will still get you from A to B, but, the entire journey is one of not feeling comfortable as you have no warning indicators or feedback as to your actual speed or engine performance.

Pastoral Care Ministries has recognised the same problem within its program. With so many features in Pastoral Care, it has been difficult to see the big picture. To combat this problem we have created the Dashboard. This one area will give you statistical information on the Family Files, all Groups, Family and Individual Dates, Roll, Finance, Weekly Statistics, Child Safe (formally called CarePlus), Library, Roster and the new Registry and Venue Booking programs.

All statistics that are displayed are interactive. Simply Double Click on them to reveal the people behind the statistic. Dashboard also includes the ability to filter on any group or groups to reveal all the vital statistics on those groups.

Also included in Dashboard is an Alerts area which informs you of predefined alerts from any date entered within the family file. So for example you can request to be alerted for birthdays happening over the next week or perhaps the wedding anniversary of a family. Also included in the Alerts area is Child Safe alerts for any or all of the date events in Child Safe. For example, you can be notified when peoples working with children's cards are approaching expiry. Venue Booking conflict Alerts also exist here to ensure no dual bookings exist for the same rooms within a venue.

It doesn't matter what you have used Pastoral Care for in the past, Dashboard provides new tools and new information that is interactive for all areas of the program.

### Pastoral Care Cloud

Pastoral Care Cloud has been re-engineered behind the scenes so that 98% of Pastoral Care features are now available on Cloud for viewing, adding or editing records with Pastoral Care 13. What isn't on Cloud was designed deliberately not to be on Cloud, for example the security setup area is restricted deliberately to be managed at the church office.

A huge request has been to have Rosters on Cloud, so this has been added to Cloud. Also new to Cloud in Pastoral Care 13 is Visitation, Roll, Financial Records, Weekly Statistics, Child Safe, Library, Registry, Venue Booking, Tagging, all the setup areas of the programs listed plus many other areas are included on Cloud.

Pastoral Care 13 is now the most powerful, flexible and cost effective church management program available.

Pastoral Care can be run as a standalone program, networked with any amount of computers, and connected via Cloud for remote operation by an unlimited amount of users or in any combination of standalone, networked and Cloud.

Using Pastoral Care via Cloud gives the flexibility to be able to completely run and change any area within the program even when that computer is not connected to the internet! The speed of the program functioning remotely is not affected by internet speed or availability, when a user has finished a session with Pastoral Care the changes are then uploaded automatically to the church master database either then or when the remote computer has access to the internet again.

Pastoral Care Cloud is an additional product to purchase which bolts onto Pastoral Care 13 with the huge advantage of being able to run with no ongoing monthly payments. A special Cloud upgrade price is available for registered Pastoral Care 12 Cloud users.

## Venue Booking

Venue Booking is a complete Church Venue/Date/Time/Room management program for handling when people want to use either all or part of your venue. The program features fixed Date/Time bookings as well as two unique pattern types of booking.

For example you can create one booking for those people who regularly use your room(s) within your venue. For Pattern bookings, an exclusion date period is available to be entered so for example on a pattern booking you could make rooms free during the school holidays. The program includes multiple venue with multiple room configurations that can be individually booked or a combination of rooms can be booked in one booking.

When making a booking the program will inform you of any conflicts with any other bookings as well as giving you an option of showing who else is using other rooms that don't conflict with your booking, but lets you know who is using the venue at the same time or on the same day.

Additional to the main Venue booking area an interactive monthly calendar window available from the main menu toolbar or from the Toolbox menu throughout the program. You can View/Edit/Add bookings with ease from this calendar view.

Many reports exist including a monthly Calendar grid that shows you visually how many bookings have been created for each day as well as the start time of the first booking and the finish time of the last booking for the day.

## Registry

The new Registry program contains 3 separate areas.

- A Commitment Registry for handling commitments like Baptisms, Church Membership, and Dedications
- A Marriage Registry with all the relevant information stored for recording a Marriage license
- A Funeral Registry

The Registry program is a major addition to Pastoral Care 13 where you are able to keep independent records on these major events in the life of the church for both the people within the church and those people who don't have a family record within the Pastoral Care database. The records stored within the Registry program are independent records from the Family File records so that they will not be removed even if a family is deleted from the Pastoral Care database. A feature does exist to link any Registry record with any person in your database. This program has been designed to keep the appropriate records for those people who are a part of the church family and those people who are not.

## Alerts

Pastoral Care now features a Date alert program found on the Utilities tab at the Main Menu. This program allows you to configured Birthdate and any Individual or Family date defined by the user to inform the user when they start Pastoral Care 13 that the anniversary of that date is about to be reached. One obvious use is to see all people's birthdays in say the next coming seven days when you start Pastoral Care.

Also featured is a replacement to the old scheduler in the previous CarePlus program. The Child Safe Alerts program which is activated from within the Child Safe area on the Toolbar lets you create an alert for all events defined in the Child Safe program. The most common use for this is to give the user a list of all working with children cards that are about to expire when Pastoral Care starts.

The new Venue Booking program also has its own Alert setup area so that any conflict bookings are alerted to the user when Pastoral Care starts.

When an alert is detected on startup, the Alert Window will open showing the user all the people attached to the alert as well as the date that caused the alert. All people attached to the alert can be sent an email, an SMS Message, attach a visitation request, view their mapping location or send their details to a report.

## Email Signature

A new feature has been added to all email areas within Pastoral Care called 'Signature'. This feature allows you to design a signature that will be added to end of every email that is sent from Pastoral Care. Features of this area include images, hyperlinks, tables and colours. Once a Signature template has been created it can then be assigned within all email areas by pressing the Signature button in the toolbar. When Pastoral Care has security turned on the Signature chosen by a user is remembered and attached to their unique log in allowing all users of Pastoral Care to have their own unique email Signature. This Signature feature is also Cloud aware so when using the Pastoral Care Cloud program any changes or additions to the Signature templates will be updated at the church office.

## Smartphone

Smartphone was a separate program available for Pastoral Care 12 users. This program has now become integrated into Pastoral Care 13 and is launched from the Utilities area at the Main Menu. Smartphone creates a special export file that can be imported into Google contacts where you can sync your portable device to Google Contacts so that you can view Pastoral Care data on that device. Alternatively you can view the data through Google Contacts using a web browser.

## Upload Data to Pastoral Care

A new Utility has been included so that your church data can be uploaded to our secure server for analysis if you are having problems with your data or your data exposes a bug which needs to be fixed.

Before data can be uploaded you would need to be supplied with a password from the Pastoral Care Support System. Also an option is available in this utility so that we can remotely connect to your computer with your permission.

# Advancements to Existing Areas

## Family File Editor

A New feature has been added to the family file which is found as soon as you enter the family file located under the names entry boxes called "Marital Status". All previous versions analysed the family file to choose which of the fifteen Marital Status possibilities the primary and secondary adult of the family could be. This information is used for statistical analysis reports as well as being able to filter on a specific marital status. Now you can override the auto analysis (default choice) and define yourself what the adult's marital status is from the fifteen available options.

The Medical Notes area within the family file has been increased from a maximum of 255 characters to 5000 characters. Also the physical Notes display area has been doubled in size to view more of the notes.

A new setup window is available within the Family Editor area, located by clicking on the new drop down Options menu located in the top left hand corner of the Family Editor area. This new feature allows you to define how the 'Previous' and Next' buttons within the editor find family files. You can now set these buttons to view just active families, Prospects, Archived or Privacy families. This function choice is just for the workstation you are working on so when Pastoral Care is on a network other users are not affected by this choice.

## Rosters

By far the two most requested options asked for have been to firstly have an option to reverse the roster grid report so dates can run along the top of the page with the duties running down the side of the page. The other request has been to place Rosters on Cloud for both creating, editing and viewing. Both these requests now exist within Pastoral Care 13.

A new email program has been added to the Roster program called 'Email Duty Participants'. This allows you to email all the people on the selected Rostered Event/Duty to request for example the people's availability before you begin to create your roster.

A new feature has been added to the Participants drop down menu called Clean up Single Absences. This feature allows you to remove all absences entered for people that have expired from a specific date. This is a valuable feature for saving time from manually cleaning up data as well as keeping the Roster data base efficient for speed when building a Roster.

A new date analysis tool has been added to Rosters, this is found under the date list as you enter the rosters area. The tool displays everybody with the Event duties that are on for a specific day or a range of days.

An option exists to view only specific events or all of them. This new tool is also available in the new Dashboard area by double clicking on the roster date in the Dashboard program.

The 'All church' roster report and 'Individual' Roster report can now include peoples contact phone number either beside or under their name within the roster grid report that is produced. Options are given to choose the priority order for finding a person's phone number within their family file.

You can now split a Duty title over one or more lines so that you can save width space to display more on the roster. The function works when you create a Duty title in the Roster setup area by placing the symbol % (percentage) in the title where you want the title to be split.

You can now disable the display of an event title on a roster grid report to save space on your report. This is most useful for churches who only have one event happening on a Sunday.

A new area exists where you can choose the Event \ Duty and then a date range to clear all people out. This becomes useful if you want to manually change people in an Event \ Duty to clear them all out first so you can see straight away the Duties needing to be filled. This function is accessed by pressing the Roster button in the toolbar and then choosing Clear Roster Duties.

All of the Duty, Team, Absence and Association reports only gave you the option to filter down on the Event within PC12, now you can choose any combination of the Duties of a specific Event before running these reports. Also available before running these reports is to suppress the Event and only display the Duties, this is useful for churches with only one Event.

Two new Roster reports have been included; one exists under the Duty tree with the other under the Team tree in the reports area. Both these reports add peoples contact details of the Duty or Team they exist in. This has been requested so a report can be given to people so they can easily contact people if they need to change their rostered on time with another person.

A new function has been added at the main menu of Rosters where you can load the dates in reverse order so you can choose to have the most recent date at the top of the list or at the bottom. This option is available by the two new arrow buttons under the date list.

Adding comments to the roster grid for a specific Event / Duty can now be added as a multiple line where previously you could only add a single line.

The Rosters View/Edit Window now saves its settings for each logged in person rather than one setting for all.

When adding people to duties or creating teams a new option exists that allow you to exclude selected people or teams from the auto build, these people/teams can still manually be added to a roster.

## Child Safe

Child Safe was formally called CarePlus.

The previous Scheduler in this area was restricted to two events; this has been replaced with the Child Safe Alerts program which is activated from Child Safe Toolbar. You can place an alert for all events defined within the program. The most common use for this is to give the user a list of all working with children cards that are about to expire when Pastoral Care starts.

A new feature has been added at the Child Safe main menu to Enable Individual Surnames, this affects loading in Child Safe people as well as the Child Safe reports.

## Roll

You can now choose the order of the attendances and absences to appear for adding attendances records to people as well as displaying in the analysis and report areas.

The Roll program now includes a Kiosk mode. This is enlarged window just for entering people's attendance to assist those churches using touch screens. Two specific resolutions are available 1280 X 720 and 1920 X 1080. Even if you're monitor is not using one of these resolutions the windows have been designed so that they can stretch or shrink to any size monitor once you put the kiosk mode into full screen mode.

The "Attendance Record up to a maximum of 41 weeks" now includes a total column which represents the total services each person has attended over the selected period.

A new Block Analysis report has been added where you can view the total services people have attended in up to 5 predefined block period of weeks. This report assists in seeing when people are slowly dropping off their attendance.

A new roll total attendance and absence report is available, this gives you the total amount of each attendance or absence category a person has been assigned to for a specific period of time. The Last Attendance Report has now been expanded to include Weeks Absence, this gives you the total amount of weeks a person has been absence since they last attended so that will be easily to now pick up when people have been away for a period. An option is also available for this report to only display people with an absence greater than zero so all people who have just attended are ignored in the report.

Also included is a new report, the same as the new Last Attendance Report but it also includes mobile, home phone and email address as a quick way to contact the people who have been away for a period.

## Visitation

The pre and post visitation notes specification has been increased from 500 characters to 5000 characters. This affects the Visitation manager and the family file visitation records.

## Email

A new feature when adding attachments to emails the program will now remember the last path you used getting the attachment. This path is stored locally so if Pastoral Care is run on a network each workstation will remember the location of the attachment loaded on that workstation.

## Report Filters

New functions exist in the 'More' area of Filters that affect all Standard Reports, Custom Directory Reports, Custom Reports and Custom Letters.

The new options are...

**Load Only Adults** – This option means all children are ignored on the family file only adults are displayed.

**Load Only Children** – This option means all Adults are ignored on the family file only children are displayed.

**Load only Both Adults if they both exist** – This option will only send both adults to the report if the family have two adults in it. For example if a family file has an active adult with their partner deceased that active person will not be sent to the report as two adults are required. Practical application is in creating a wedding anniversary report while not including those couples in which one has been deceased.

**Load all Adults and the Child if a Child passes through filters** – This option focuses on the child, if a child is passed through the filters the adults are then included on the report. Practical application is in creating a report of all the youth group children with the adults and the child on the report.

**Load all Children and the Adult if an Adult passes through filters** – This option focuses on the Adult, if an adult is passed through the filters the children are then included on the report.

## Custom Reports

Custom Reports, Custom Directory & Custom Letter Preview window has been modified so that it remembers the settings you have chosen for each session in those areas. This way for example you can choose the families you wish to preview then go back and make changes to the report or letter and preview those same families without having to setup the preview each time you access the window. Also added to the preview window is a tag all option to tag all the families.

## Security

A new option exists in the Security setup area where you can enable all passwords to be case sensitive.

## Export

All of the export options now have 'Select All' and 'Clear All' as well when any export file is created an option is given to the user to open Windows Explorer with the newly created export file highlighted.

## Quick Date

Quick Date on the Toolbox menu, now has a Filters button allowing all filter options to be available to Quick Date.

## Pastoral Care Doctor

Three new features have been added to the Pastoral Care Doctor Program, now it can clear both the Email and SMS queue externally from Pastoral Care as well resetting Cloud.

## Setup Area

A new option available in the Global setup options tab, this option allows the user to filter out Archive, deceased and Prospect people from the address book at the main menu as well as when using the Custom Letter, Custom Directory, and Custom Reports preview windows

## Behind the Scenes

Each version of Pastoral Care always comes with updated programming tools and support programs used to create the program. This keeps us up with technology, security and new features released regularly from our 3<sup>rd</sup> party providers.

## System Requirements

Pastoral Care 13 will work on windows 10, 8.1, 8, 7 and Vista. Pastoral Care 13 will work on XP with SP3 but this is highly not recommended as Microsoft stopped producing security updates for XP from April 8<sup>th</sup> 2014. We are aware some churches still use Windows XP, especially on servers, and strongly recommend if you are one of those churches you upgrade your Windows edition to one that Microsoft supports with updates.

## Upgrading

We are offering a special upgrade price to Pastoral Care 13 for all Pastoral Care 12 and 11 users which is significantly cheaper from having to purchase the full edition of Pastoral Care 13. All users with Pastoral Care 10 and below need to purchase a full edition licence. For previous users of Pastoral Care Cloud we also offer a special upgrade price.

## Evaluation

The evaluation version and the full edition of Pastoral Care are now the same product so once the product has been purchased there is no need to uninstall the evaluation edition and install the full edition. All you need to do is enter your registration details to activate the product.