

# Pastoral Care 14

Pastoral tools for today's Church

Cloud Ready edition



(c) 1988-2019 Pastoral Care Ministries  
Over 30 Years of Experience Serving Churches

*Pastoral Care Software has been designed with you in mind. If you are in church leadership or management, and have a desire to get your job done with as little fuss as possible, then this is the product for you.*

*Designed for the largest church, and affordable for all has always been our motto, and now with Cloud Add On's that won't break the bank, our unique approach to portable computing with centralised data is the most secure available, and has NO ongoing costs.*

*We trust you will enjoy Pastoral Care 14, it was built for you...*

# Pastoral Care 14

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## Foreword

It is our passion that you will discover new and more exciting ways to manage the every day tasks required to look after the administration of your church.

In becoming more efficient, it is our desire to free you to be more able to focus what is really important... people.

Caring for Pastoral Needs of your church is high calling, and we are humbled to be a part of your calling as well.

Dig in and enjoy this total package that has matured over many years - we have made this for you.

# **Chapter**

---



**1**

***Introduction***

## Introduction

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!

Check out [What's New](#) for more great features!

### 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 30 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...](#)

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## Welcome

Welcome to Pastoral Care. If you have upgraded from an earlier version of Pastoral Care, 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](#)

[Get the full list of new features here](#)







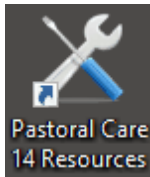
## What's New

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.

- 1** Pastoral Care 11 and older, 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** **Classroom Manager**  
More than just a check in / check out system for Child Safe requirements, this entire new feature will work tirelessly to help your team manage everyone in ministry that has to manage people in a class. Childrens Church, Sunday School, Adult Classes in fact any class of any size. Use the Classroom Manager to streamline your check in and check out procedures from as simple as you need to as complex as you need, the choice is yours.
- 3** **Asset Manager**  
Completely record and track assets in your church, including statistical reports, depreciation, searching and auditing features.
- 4** **Portrait Management**  
Anywhere where a picture is needed, we now have a sleek new feature to make handling your photos of people much easier. Use a web cam or an integrated web cam on a laptop to take photos as needed and attach those photos to individuals and families. INCLUDING VISITORS!
- 5** **New Simple Filter View**  
Anywhere a filter is needed for a report etc, you can use a new simple view of filters, for just tick this and get a list of those people, or press advanced for the full power of our unbeatable database search tools.
- 6** **Backup**  
Backups have been improved to prompt you more easily to keep your database safe.
- 7** **Cloud Enhancements**  
Naturally, PC14 Cloud will include all new added features in its support list. All of Pastoral Care is safely linked to remote computers without the security issues associated with online web based database systems.
- 8** **and much much more...**  
All throughout Pastoral Care 14 there are new behind the scenes feature improvements that are too numerous to mention here... dig in and enjoy the stability and power of the latest Pastoral Care version.



## 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 14 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 Resources](#)

[Pastoral Care Doctor](#)

[Pastoral Care Communicator](#)

[Pastoral Care Personal SMS](#)

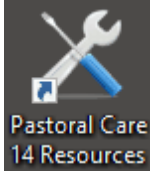
[Pastoral Care Directory](#)

[External Backup Program](#)

[External Restore Program](#)

[Conversion Utility](#)

## Pastoral Care Resources



Click on the Pastoral Care 14 Resources Icon installed with Pastoral Care 14 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.

PC14 Resources ✕

Pastoral Care 14 is supported by standalone programs that can be freely distributed and used within the congregation as well as programs and documents that directly support the installation of Pastoral Care 14 on this workstation.

**Standalone Applications**

- Communicator
- Directory
- Personal SMS

**Support Applications for Pastoral Care 14**

- Update
- Doctor
- Conversion
- External Backup
- External Restore

**Documents associated with Pastoral Care 14**

- Pastoral Care on Cloud
- PC14 Manual
- New Features PC14
- Multi User License
- Standalone Installation
- Network Installation
- Conversion Issues
- Solving SMS problems
- Pastoral Care Not Starting Up
- Unable To Upgrade Database

Pastoral Care Communicator - A standalone SMS Email program designed with the leadership of the church in mind so they can have their own personal program for sending out bulk SMS or Emails. Lists of people can be imported into the program which are created and exported from Pastoral Care. The Communicator program also includes its own personal contact list. This program can be freely distributed to as many people within your church as required.

To obtain the installation software for this program so it can be distributed within your church download it from the Pastoral Care web site at [www.pastoralcare.com.au](http://www.pastoralcare.com.au)

**Path to Resource...**  
C:\Program Files (x86)\Pastoral\_Care\_Ministries\Pastoral\_Care\_14\PC14\_Communicator.exe

Exit Launch

# **Chapter**

---



**2**

***Getting Started***

## Getting Started Installation

### 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. Download your installation from [www.pastoralcare.com.au](http://www.pastoralcare.com.au). If you are installing on more than one computer, maybe save the download onto a USB memory stick for installing on other computers.

2. Run the setup program that has been downloaded. It's icon looks like this...



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.

Pastoral Care 14 comes with a new networking setup Assistant that will make this process much easier than before.

*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 full remote access to Pastoral Care from outside of your church network, check out the additional cloud

products that we have to add onto Pastoral Care 14.

## 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

Just about all information stored in Pastoral Care will be converted to latest version for. Since there are a number of versions out still being used today, we cant include all combinations of information, however the conversion program will tell you what has not been converted after the conversion has completed.

## 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 Options - Import External Data 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!

Import

Available fields to Link

- Spouse Name
- Child 1 Name
- Child 2 Name
- Child 3 Name
- Child 4 Name
- Child 5 Name
- Child 6 Name
- Child 7 Name
- Child 8 Name
- Child 9 Name
- Child 10 Name
- Spouse Birth Date
- Child 1 Birth Date

Link →

← UnLink

First line of import file to setup links

- Surname ,(Surname)
- Given ,(Primary Name)
- Title
- Gender
- Middle Name
- Other Surname
- Birth date ,(Primary Birth Date)
- Personal Mobile
- Personal Email
- Business Phone
- Business Email
- Business Fax
- Occupation

Available families for importing

- Allwright, Stephen, Mr., Male, , 3/07/1962 12:00:00 AM, 041234567890, stephen@spirit.net.au, 018-998725, , 5 Bar ^
- Allwright, Marion, Mrs., Female, , 5/07/1964 12:00:00 AM, 041234567890, , 054-229876, business email, , 5 Bank St, ^
- Angel, Peter, Mrs., Male, , 2/06/1970 12:00:00 AM, 041234567890, , , 12 Water Way Crt., Gisborne, 3444, VIC., 11, A6 ^
- Angel, Belinda, , Female, , 4/05/1972 12:00:00 AM, 041234567890, , , 12 Water Way Crt., Gisborne, 3444, VIC., 11, A6 ^
- Angel, Helen, , Female, , 5/08/1996 12:00:00 AM, , , , 12 Water Way Crt., Gisborne, 3444, VIC., 11, A6, PO BOX 876, C ^
- Anglin, Brent, Mr., Male, , 12/07/1956 12:00:00 AM, 041234567890, , 03-273214, , , 10 Marsh Road, , Keilor Heights, 3 ^
- Anglin, Katey, Mrs., Female, , 4/06/1954 12:00:00 AM, 041234567890, , , , 10 Marsh Road, , Keilor Heights, 3191, VIC, ^
- Anglin, Mathew, , Male, , 12/03/1990 12:00:00 AM, 041234567890, , , , 10 Marsh Road, , Keilor Heights, 3191, VIC., 15, ^
- Anglin, Levi, , Male, , 3/08/1985 12:00:00 AM, 041234567890, , , , 10 Marsh Road, , Keilor Heights, 3191, VIC., 15, A4, ^
- Anglin, Kerry, , Female, , 4/06/2000 12:00:00 AM, , , , , 10 Marsh Road, , Keilor Heights, 3191, VIC., 15, A4, , , 03-273 ^



## 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!



# **Chapter**

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**3**

***Common Features***

## Common Features

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

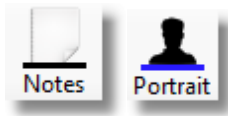
Click [Quick Reporting](#) for more details on this REPORTING common feature.



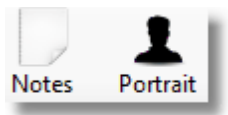
## Tool Bar Active Icons

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.

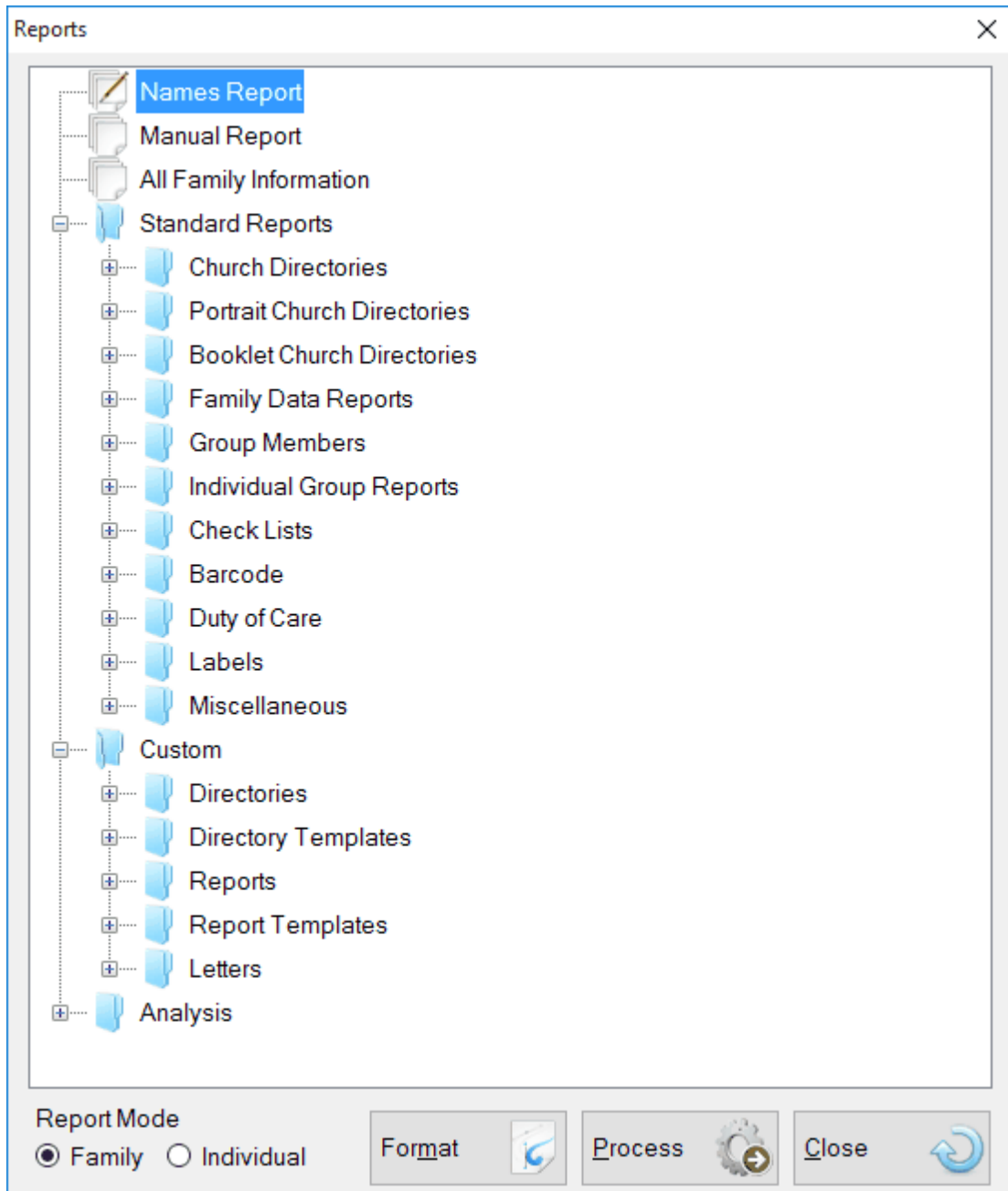




## Quick Reporting

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

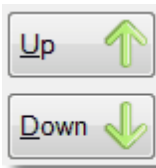
There are a number of icons throughout Pastoral Care that all have a similar function. As well as being described throughout the documentation, we have also described them here.

### Add



Add a selected item to a person / family or list

### Move / Order



Order an item stored in a list.

### Tagging



Press the Green tick icon select items in a list that have a check box



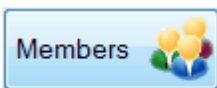
Press the red Cross Icon to de-select items in a list that have a check box.

### 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 a new setup item to a list of items.



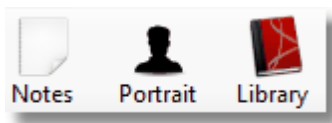
## Active Icons

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 below 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 below 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



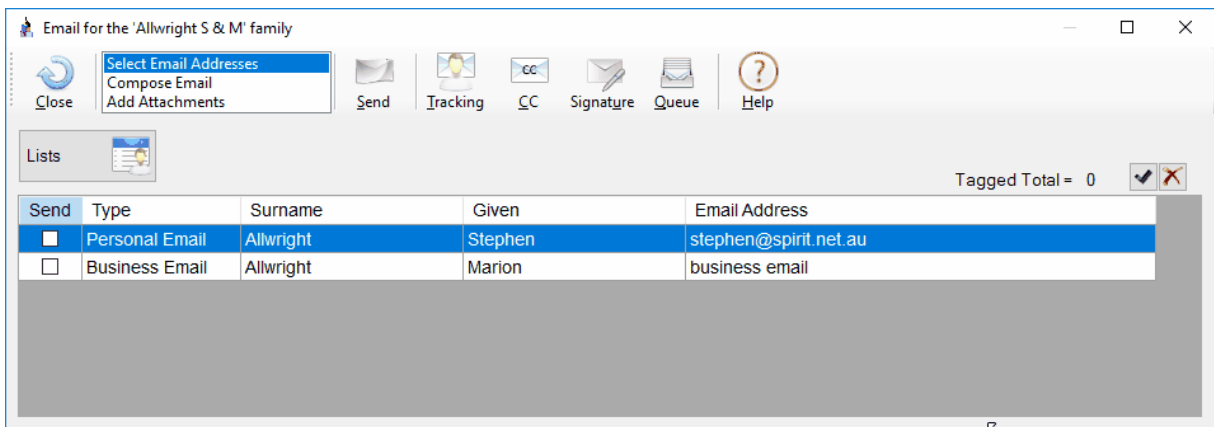
The Email Button shown above is one of our common area features. Whenever this is pressed, the email area is loaded with some limited features and names and email addresses already loaded.

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  
Compose Email  
Add Attachments

### Select Email Addresses

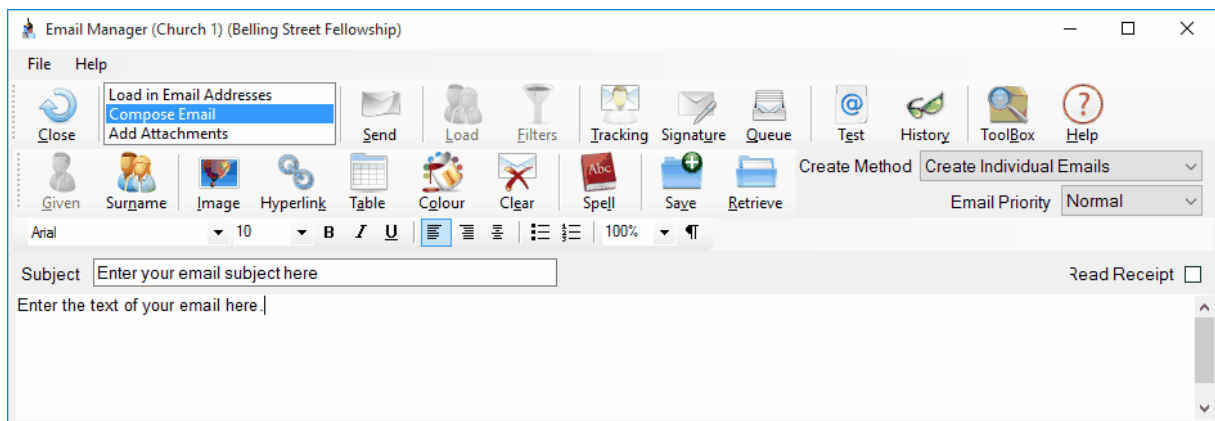
Choose this option to view the Family and Individual Emails available for the selected family. You can tick the Send option on the left of each person to choose who you wish to send the email to.

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.*

## 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



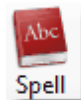
Set the Text Colour and Background Colour of the selected text.

Insert a field that automatically includes the recipients last name



Clear the current email

Insert a Picture into the email.



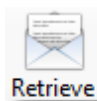
Access the Spell Checker Settings

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.

Create Method

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.

Email Priority

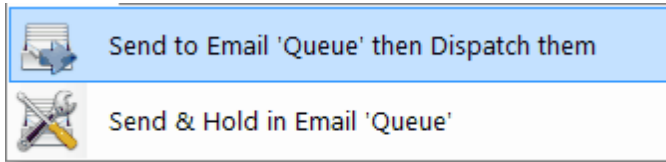
Set the email priority as Low, Normal or High.



## 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. The advantage of holding in the queue is you have a second opportunity to review what you are sending to people, and you can even manually adjust any of the emails on an individual basis before you send them.

## 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.

As shown below, tick the email addresses you wish to send a tracking email to, and press Save.

Email Tracking

Send Tracking Email To...

Tag	Surname	Given Name	Email Address
<input checked="" type="checkbox"/>	Carrow	Hellen	hellen.carrow@bellingstfellowship.org
<input checked="" type="checkbox"/>	Carrow	Peter	peter.carrow@bellingstfellowship.org
<input type="checkbox"/>	Kimmings	Jane	jane.kimmings@bellingstfellowship.org

<

Help ?

Save

Close

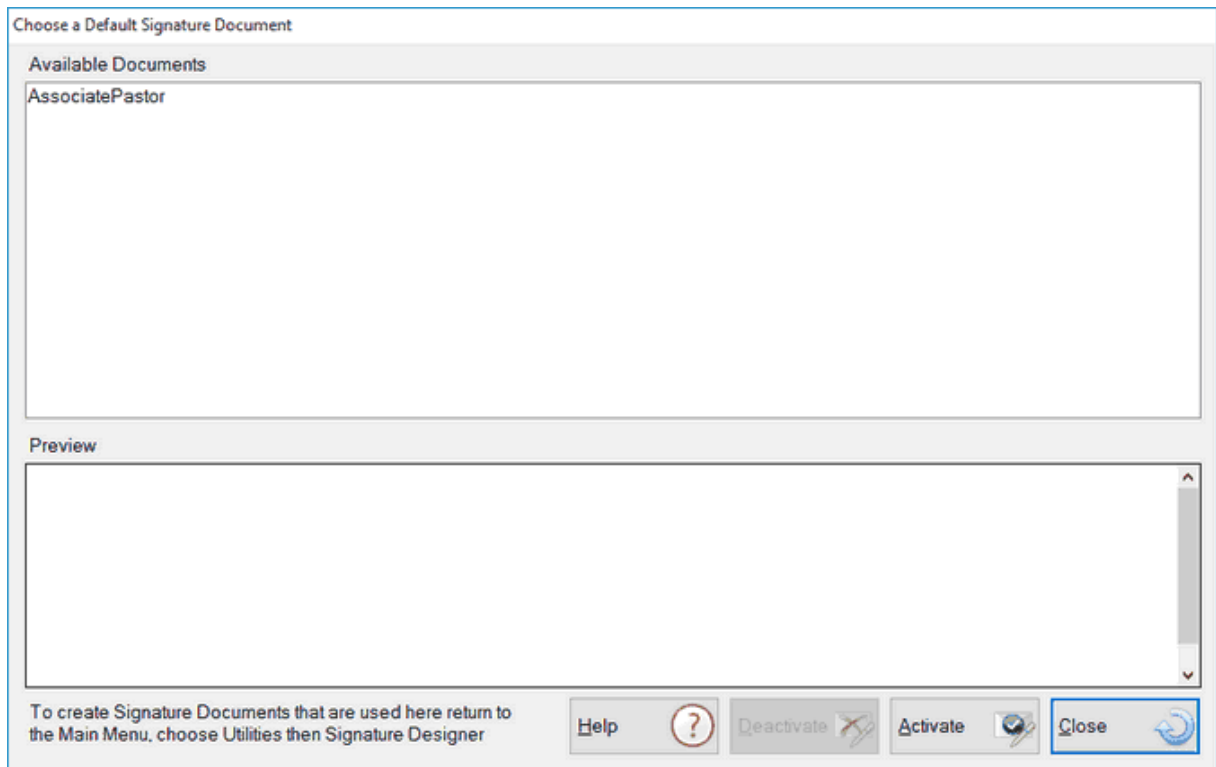
## CC

Add a CC (Carbon Copy) to the email. See [CC](#) for more information.

## Signature



Use this Signature window to attach a signature to the bottom of your emails. Once attached, the signature will not be visible on the email edit window, it will be added as it is sent out.



To set a DEFAULT SIGNATURE for the current computer, simply select it from the list and press the Activate button.

To REMOVE the DEFAULT SIGNATURE, press the Deactivate button.

See [Email Signature Designer](#) for information on how to create a signature file.

## Personal Details Report Options

Tick any of the fields that you wish to include on the emailed report. (Naturally, only those people being emailed will receive their own information!)

*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

**Individual Details**

Individual Condition       School Year

Gender                               Occupation

Preferred / Actual Name       Status

Title                                       Individual Groups

Birth Date                               Ministry

Other Surname                       Medical

Middle Name                           Relationship

Personal Email                       SMS Lists

Personal Mobile                       Email Lists

Business Phone

Business Email

Business Fax

**Individual Dates**

Membership

Baptised

Confirmation

Christened

**Flexi Fields**

Elder

**Family Details**

Residential Address       Family Condition

Postal Address               Family File Created & Last Edit Date

Phone                                   Family File Memo

Family Mobile                       Family General Notes from NoteBook

Family Fax                               Family Visitation Notes from NoteBook

Family Email                           Personal Notes from NoteBook

Other Contacts

Family Group                           Include Portraits

Family Events

Visitation Completed

Include Pre Visitation Notes

Include Post Visitation Notes

**Family Dates**

Wedding Date

Contact Date

Hidden 
Help 
Clear 
Cancel 
Date Filter 26
OK

### 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.

Pastoral Care Email Queue

Close Send Re Load Tag All UnTag All Delete Edit Ready Test Help Tagged Amount = 6

Send	Status	Created	Subject	From	To
<input checked="" type="checkbox"/>	Ready	13/10/2015	Members Meeting Reminder	Fellowship	To: "Allwright Family" <stephen@spirit.net.au>
<input checked="" type="checkbox"/>	Ready	13/10/2015	Members Meeting Reminder	Fellowship	To: "Angel Family" <angel@spirit.com.au>
<input checked="" type="checkbox"/>	Ready	13/10/2015	Members Meeting Reminder	Fellowship	To: "Anglin Family" <Brentl@spirit.com.au>
<input checked="" type="checkbox"/>	Ready	13/10/2015	Members Meeting Reminder	Fellowship	To: "Barton Family" <ray@spirit.com.au>
<input checked="" type="checkbox"/>	Ready	13/10/2015	Members Meeting Reminder (Tracki...	Fellowship	To: "Hellen Carrow" <hellen.carrow@bellingsf...
<input checked="" type="checkbox"/>	Ready	13/10/2015	Members Meeting Reminder (Tracki...	Fellowship	To: "Peter Carrow" <peter.carrow@bellingsf...

### 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.



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



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



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



Delete emails from the Queue. See Delete Options below.



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](#) 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!



Tick all emails in the list to send

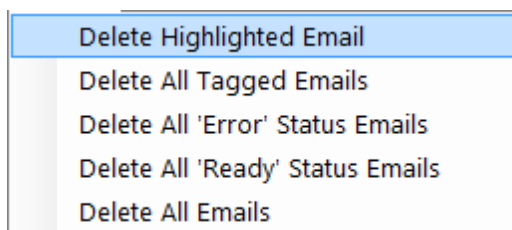


Change the status of an error state email back to ready so it can be sent again.

### Delete Options

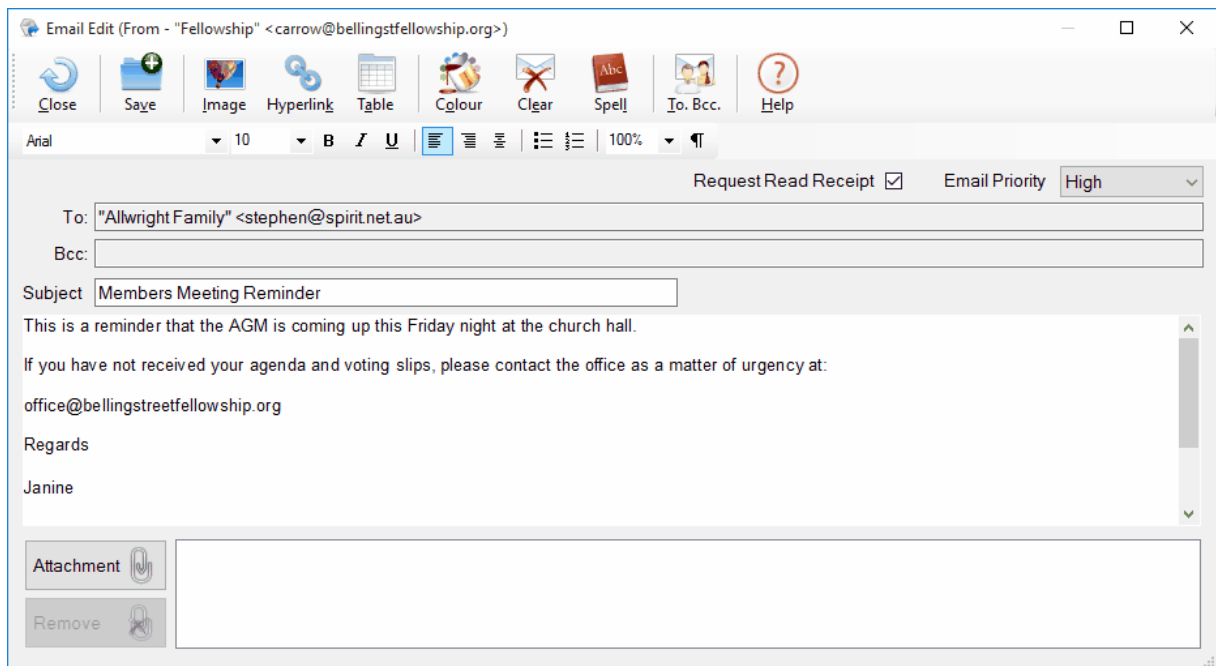
Pressing the DELETE button on the toolbar will bring up the following options.

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!



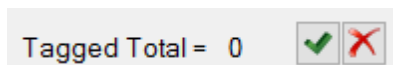
As well as being able to edit the Subject and Message, you can also add or remove Attachments, use any button on the toolbar to include Images, Hyperlinks and Tables etc. You can even change who you are sending the email to by pressing the



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 the Green tick icon to send emails to everyone in the list.



Press the red Cross Icon 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)



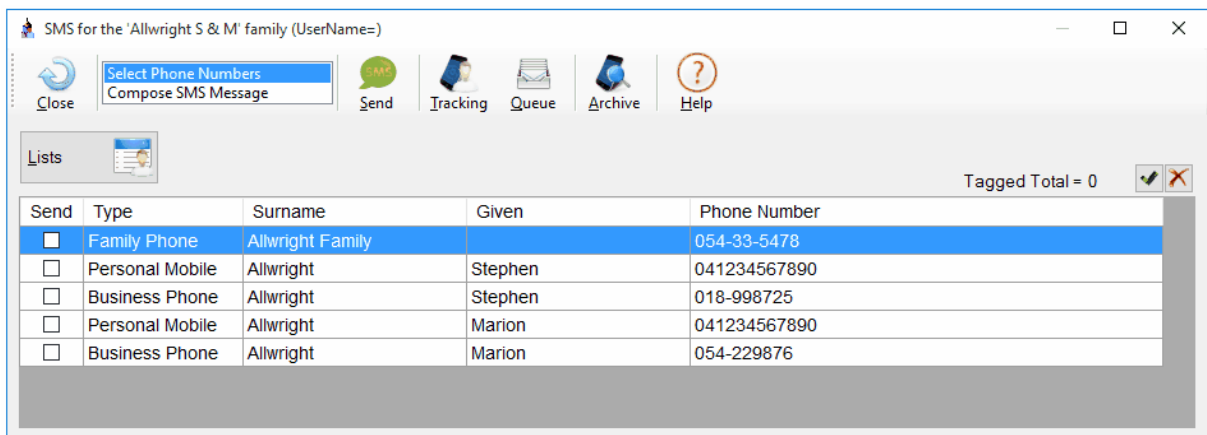
There are a few common areas that the SMS feature can be used from. Anywhere you see the SMS button you can press this to send text messages to people from the current area. For example people in the current family file, or people in the currently selected group etc. See also [SMS Configuration](#) for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

### SMS Family Screen

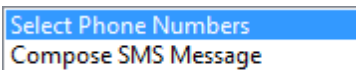
The example we are showing below is using SMS from the Family File, however it is identical to pressing SMS from the Main Menu Group window or [Address Book](#).



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



### Options



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 the Green tick icon to tick all phone numbers on the screen to send a text to



Press the red Cross Icon to to de-select everyone in the list.

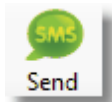
Note, if you select a landline phone number, where supported, SMS message will be converted to Voice for that phone. (Currently supported in Australia and New Zealand in most areas)

## Lists

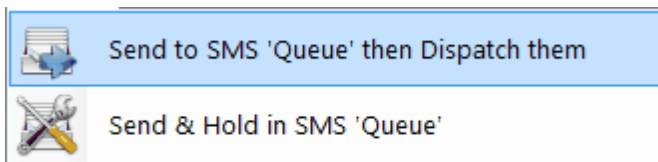
Choose a pre-defined SMS list to send a message to. This will remove the family from the Tag options, and load in people in the SMS List.

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

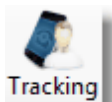
This option will send all the messages to the SMS Queue, and then Pastoral Care will send the messages out to SMS Global for immediate delivery.

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

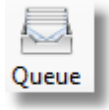
This option will send all the messages to the SMS Queue, and then HOLD them there for review and sending later. See [SMS Manager](#) for more information on SMS management etc.

## 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.



# **Chapter**

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**4**

***Toolbox***

## Toolbox



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



### Venue Booking Calendar

Access a monthly Calendar view of Venue (room) Bookings (See [Venue Booking](#) for full feature details)



### Scribble Pad

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



### User Guide

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.

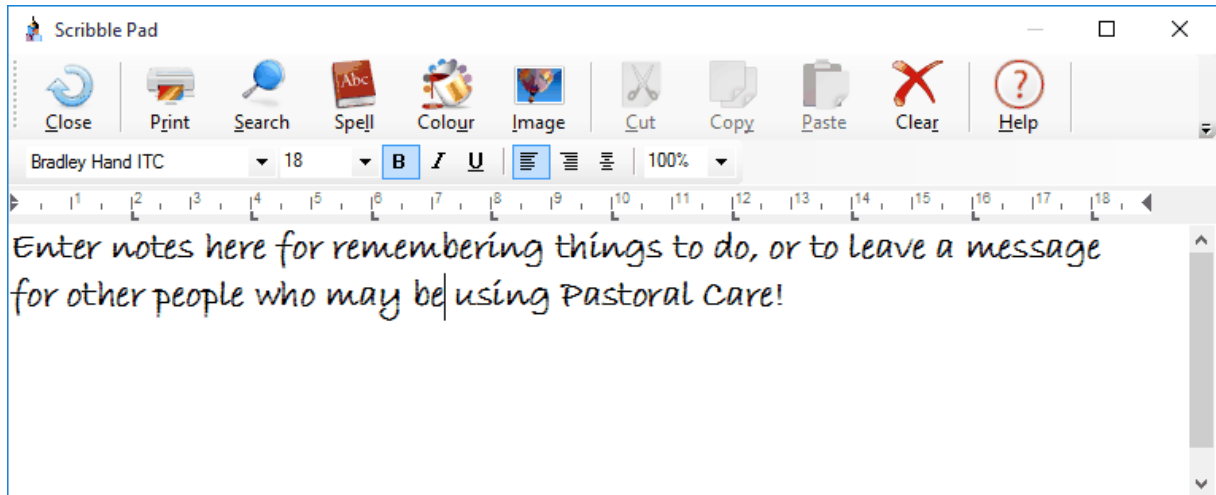


### Exit

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

All Dates

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

## Within the next

Within the next  Days

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.

## Month

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.

## Age

Age  To  Years

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.

## Date

Date

To

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.

## Anniversary

Anniversary Date

To

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.

## Order Date By

Order Date by

By Surname  By Month  By Date

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

## Process



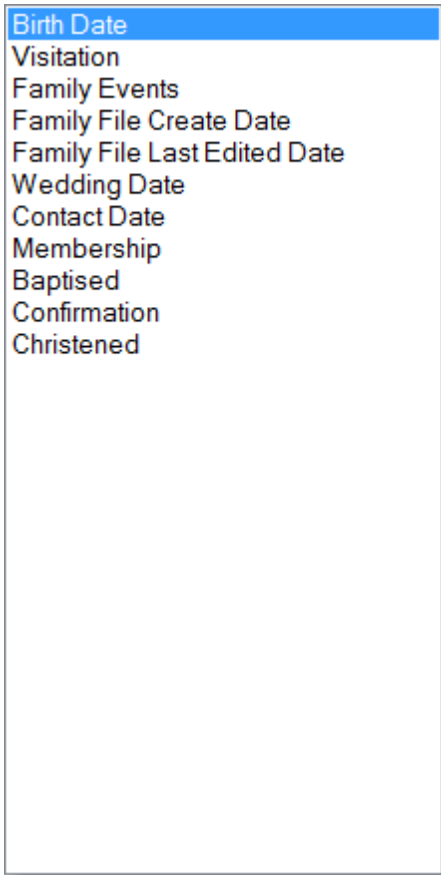
Press the process button to produce the date report.

## 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

# **Chapter**

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**5**

***Windows Integration***



## Windows Integration

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

# **Chapter**

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**6**

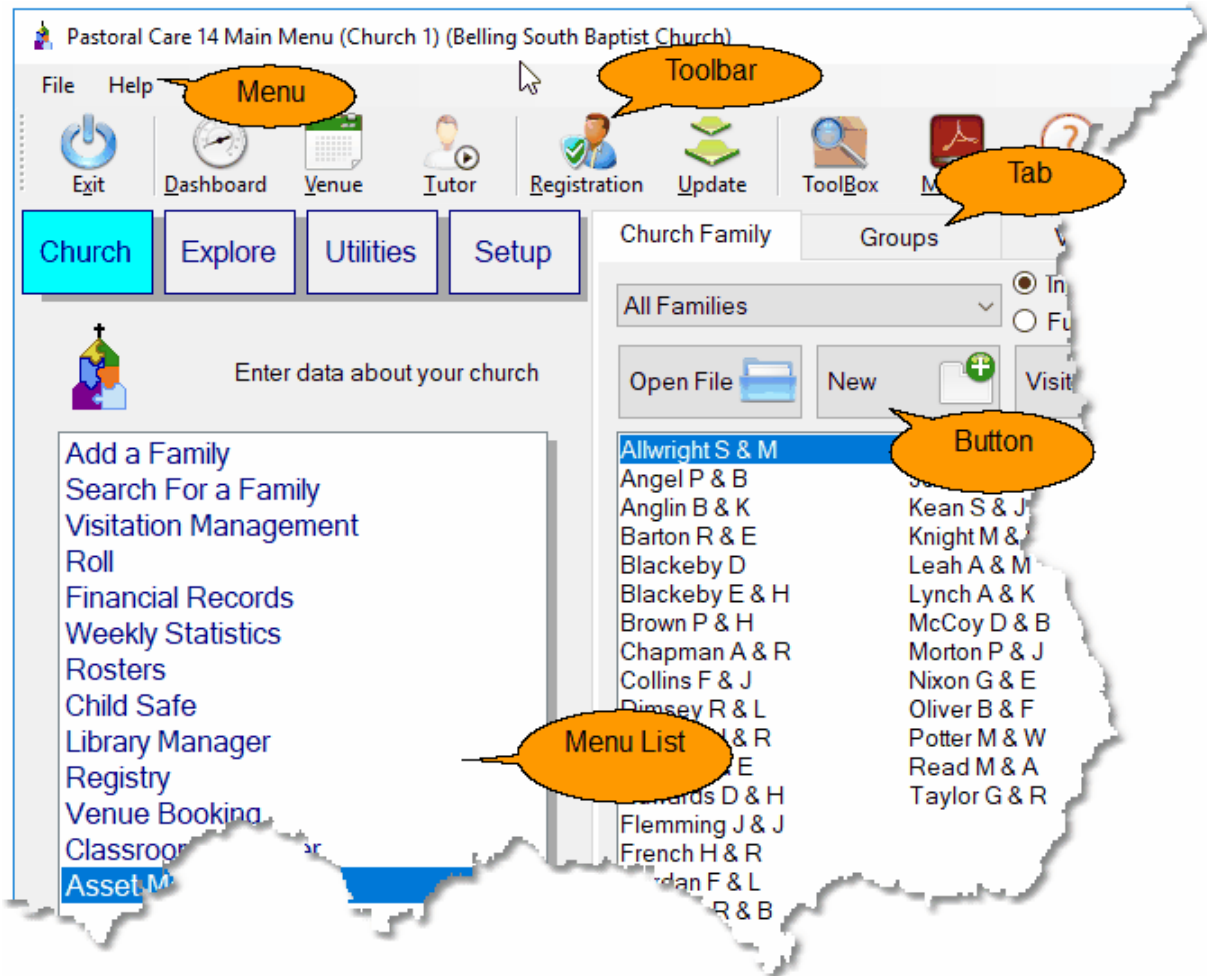
***The Main Menu***

## The Main Menu

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.

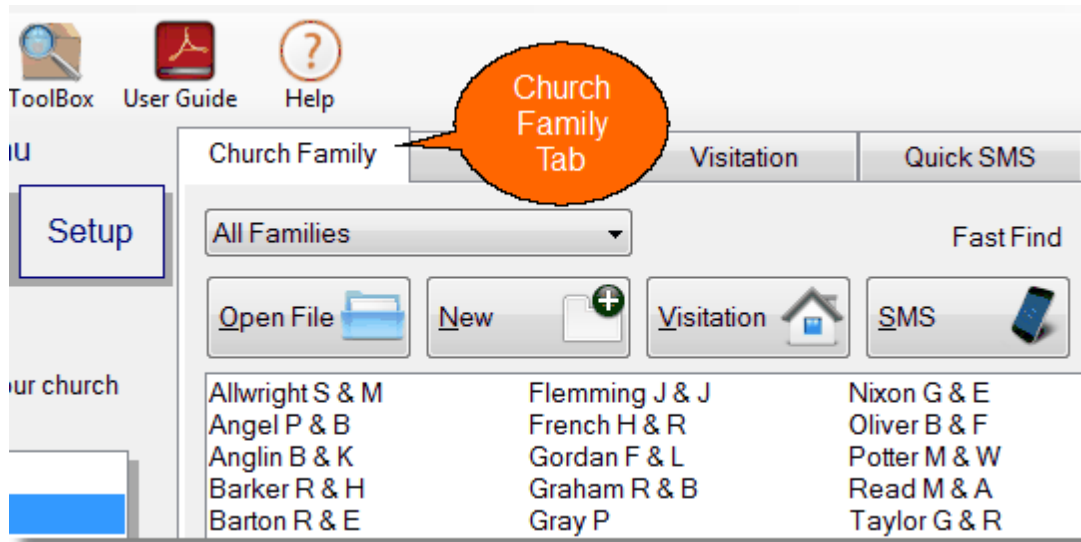
There are a few common words we use to describe different elements of the program. The main terms that are used extensively throughout the program are Tool Bar, Menu, Menu List Tab and Button.

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
---------------	--------	------------	-----------	-------------	---------------

Initial  
 Full Name


All Families Fast Find

Open File 
 New 
 Visitation 
 SMS 
 Email 
 Map 

Allwright S & M	Iles B & W
Angel P & B	Jones C & W
Anglin B & K	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	
Harris D & A	

Family File Total = 32

Stephen, Marion  
 5 Bank St  
 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

All Families

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

### Display Mode

- Initial  
 Full Name

These options will change the display of families in the Address Book on the main menu. Select Full Name to see Surname First Adult Name and Second Adult Name, or select Initial to see Surname and Initials.

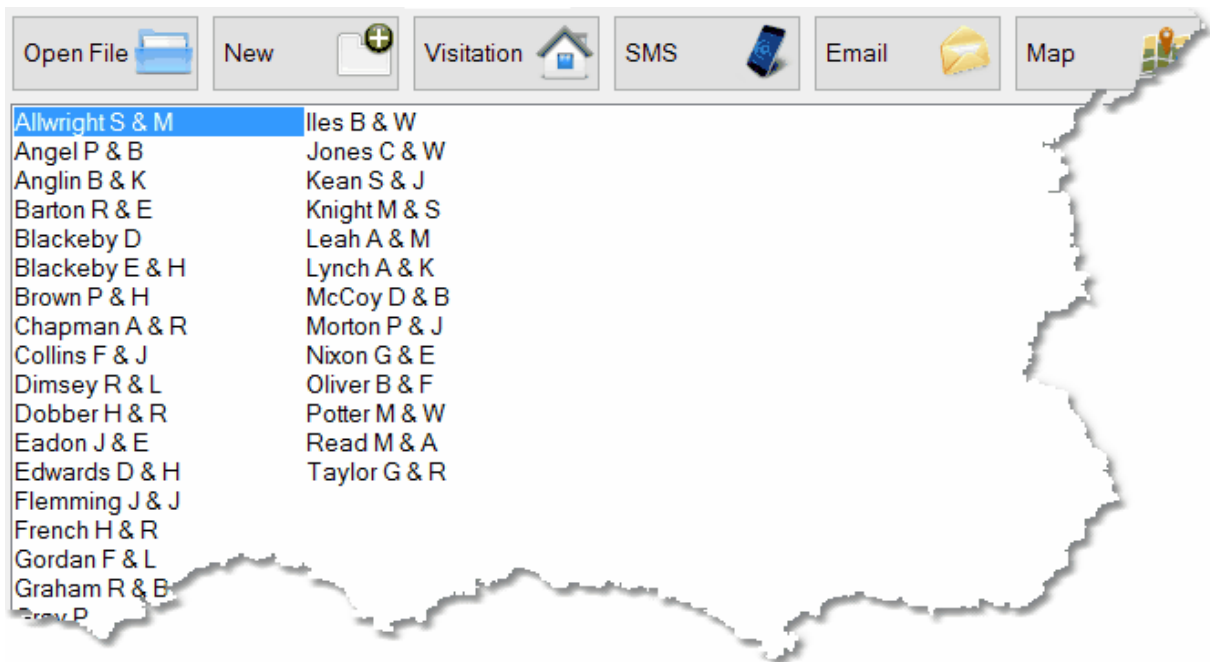
For Example:

**Initial:** Allwright S & M

**Full Name:** Allwright Stephen & Marion

### 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.

Shown below is the Visitation Request window.

## 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
✕

Arrange a Visitation Request for...  
**Allwright S & M**

Target 'Completed' visits for 2015 = 0
Completed visits 2015 = 0

Visitation team

- Team 1
- Team 2
- Team 3
- Team 4

Current requests attached to family

Complete

View Requests

Visitation assigned To

ToDo	Name
2	Allwright Stephen
0	Allwright Marion
0	Angel Peter
0	Angel Belinda
0	Angel Helen

History

Requested by

Requested Date

Send email upon Create Request

Pre visitation notes

Help

Create Request

Close

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

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

- Pastoral
- Elders
- Wellness

informed of dates and times etc.

### Current Requests

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

Sunday, 5 August 2012

### Complete



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

See [Visitation Complete](#) for more information

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.

Pastoral Visitation Complete ×

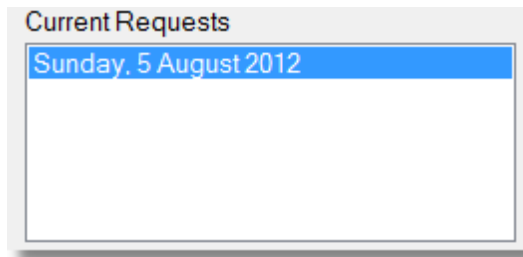
Completing a Visitation Request will remove the request record and update the family file with the following visitation information.

Requested by	Assigned to	Date
<input type="text" value="Stephen"/>	<input type="text" value="Ray Barton"/>	<input style="border-bottom: none; border-right: none; border-top: none; border-left: none;" type="text" value="Wednesday, 21 December 2016"/> <span style="border-bottom: none; border-right: none; border-top: none; border-left: none;">▼</span>

<p>Pre Visitation Note</p> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div>	<p>Post Visitation Note</p> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div>
--	---

Update family file with a Visitation Record

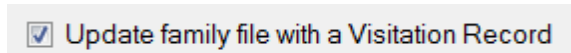
Help 
Cancel 
Complete



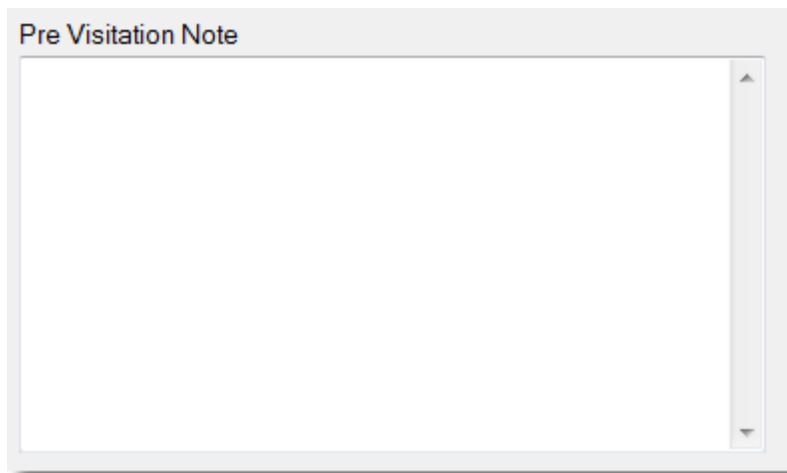
This is list of all outstanding Visitation Requests for the currently selected family.



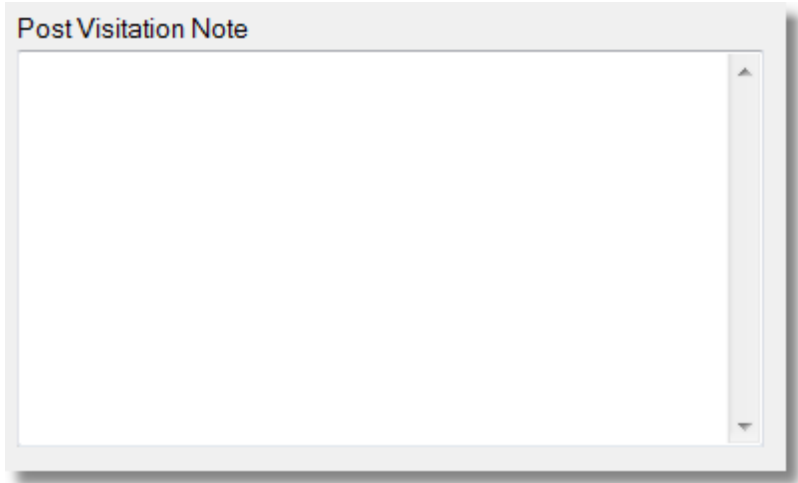
Press this button to mark the currently selected visitation as Completed. The Default option of recording the completion in the family editor should be left ticked.



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



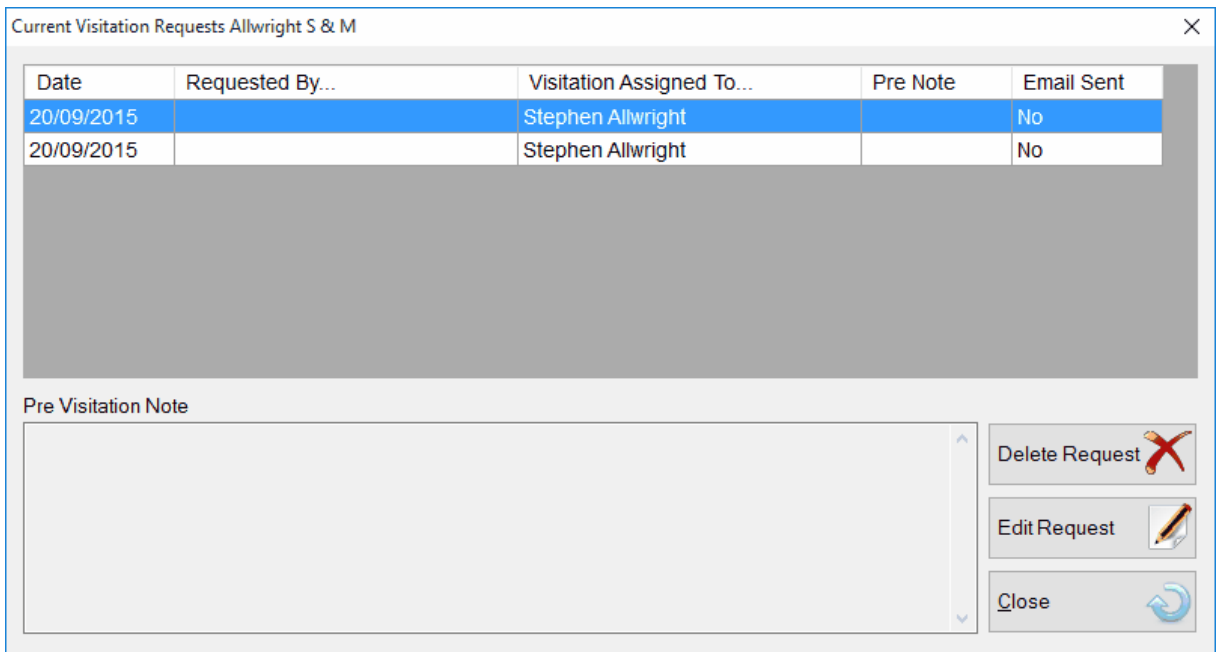
This area records any notes that are considered important to know before a visit.



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

**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.

Visitational History
×

**Visits to be completed by 'Barton Ray'**

Current Requests for Visits Total = 1

Date	Requested By...	Family for Visitation...	Pre Note	Email Sent
21/12/2016	Stephen	Dimsey R & L		

Pre Visitation Note

History of completed visits Total = 0

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

Delete

Update Note

Email Request

Close

**Requested By**

A screenshot of a form field labeled 'Requested by'. It contains an empty text input box. Below it is a date selector showing 'Sunday . 5 August 2012' with a calendar icon. At the bottom is a checked checkbox labeled 'Send email upon 'Create Request''.

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**

A screenshot of a form field labeled 'Requested Date'. It contains a date selector showing 'Sunday . 5 August 2012' with a calendar icon. At the bottom is a checked checkbox labeled 'Send email upon 'Create Request''.

Select a date for the proposed visit.

**Send Email**

A screenshot of a form field labeled 'Send Email'. It contains a checked checkbox labeled 'Send email upon 'Create Request''.

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

**Create Request**

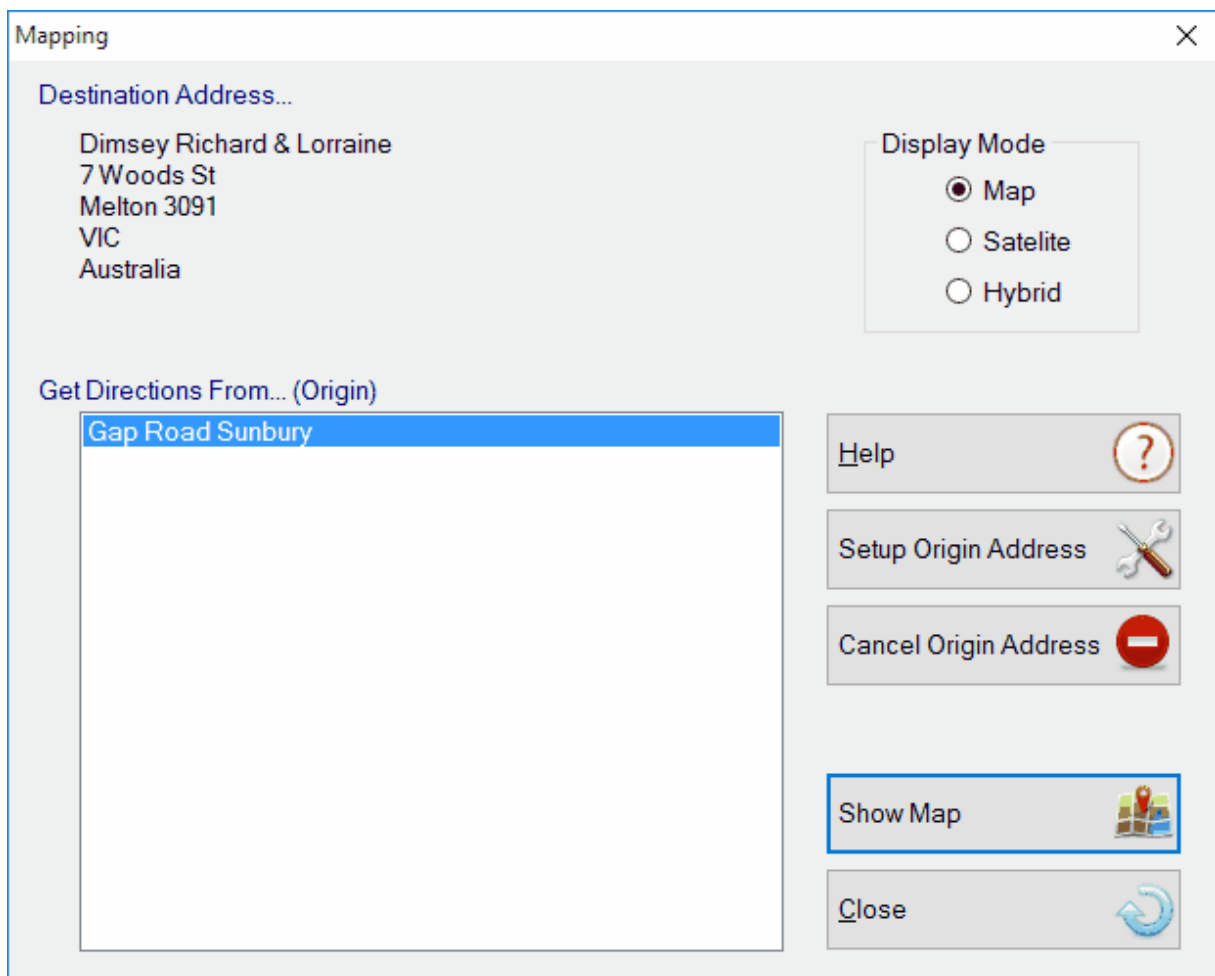
When you have selected the Team, Team member and entered any Visitation Notes, and filled in the Request Date and Requested By fields, press the Create Request Button to complete the process. If ticked, and email of the request will be emailed to the team member assigned to that Visitation Request.

**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.

## Quick SMS

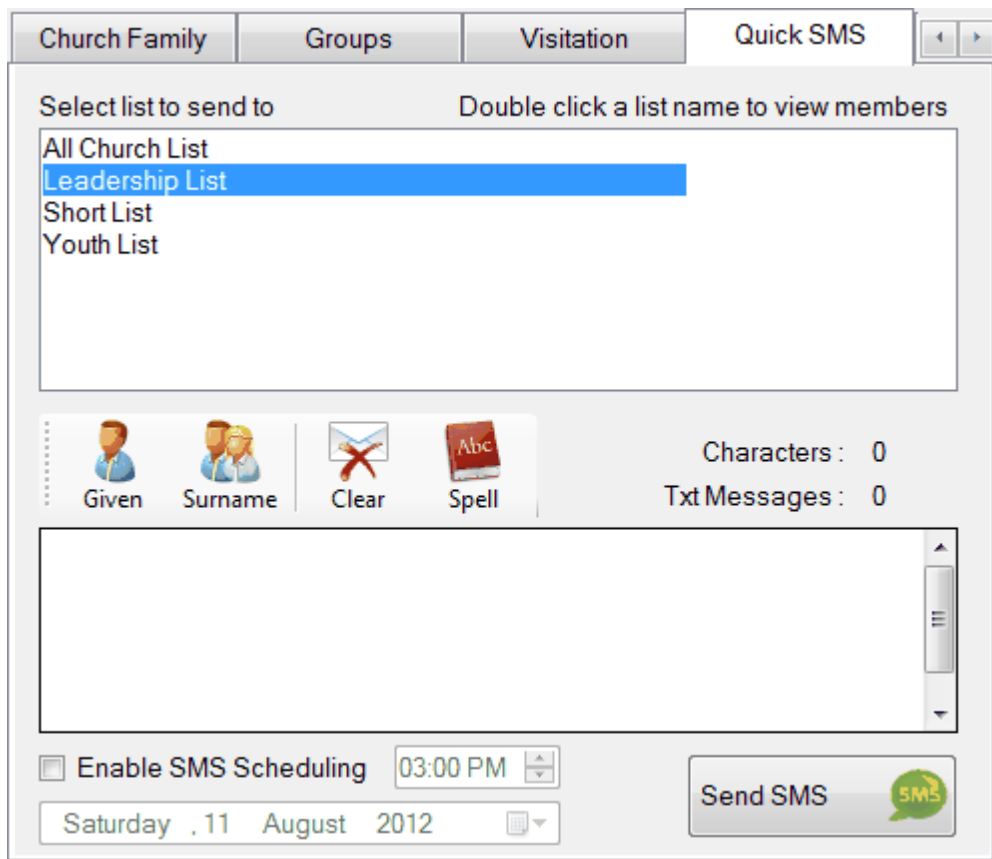
Quick SMS from the main menu has one function only. To SEND text messages to SMS lists. If you have not setup any SMS lists, you will be unable to send an SMS from this area.

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.

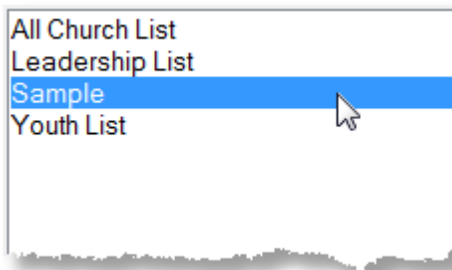
For more advanced SMS features see [SMS Manager](#)



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

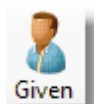


### Select List



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

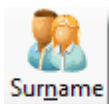
### Given



Given

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

### Surname



Surname

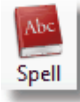
Insert the Surname of the recipient in the message. This is ideal for personalising each message.

## Clear



Erase the message you have type to start again!

## Spell

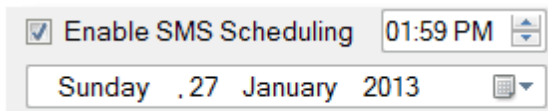


Access the Spell Checker Settings

## 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.



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

Quick SMS

Close Send Tracking Queue Help

Smsglobal Status: Connection Established

Return ID: 0400123456

Send	Type	Surname	Given	Phone Number
<input checked="" type="checkbox"/>	Personal Mobile	Allwright	Marion	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	Ray	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Barton	Ethel	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Barton	Ernie	041234567890
<input checked="" type="checkbox"/>	Family Mobile	Barton	Karren	041234567890

Tagged Total = 106

Account Details

Credit Available : \$133.21  
 Txt's Available : 1665  
 Cost per Txt : \$0.08

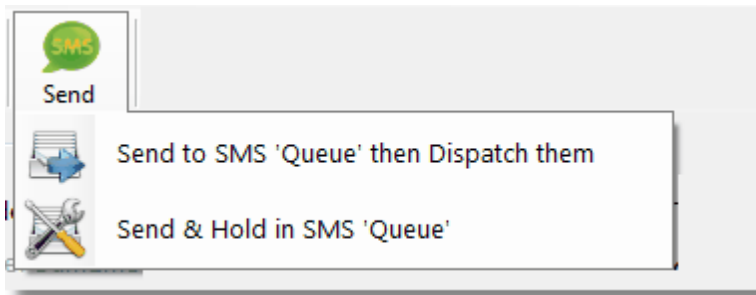
Current Message

	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.

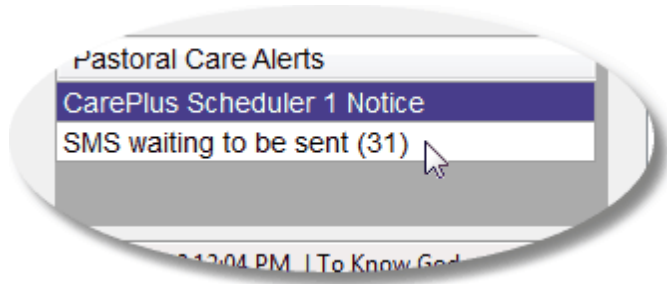


## Send to Queue and Dispatch

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.

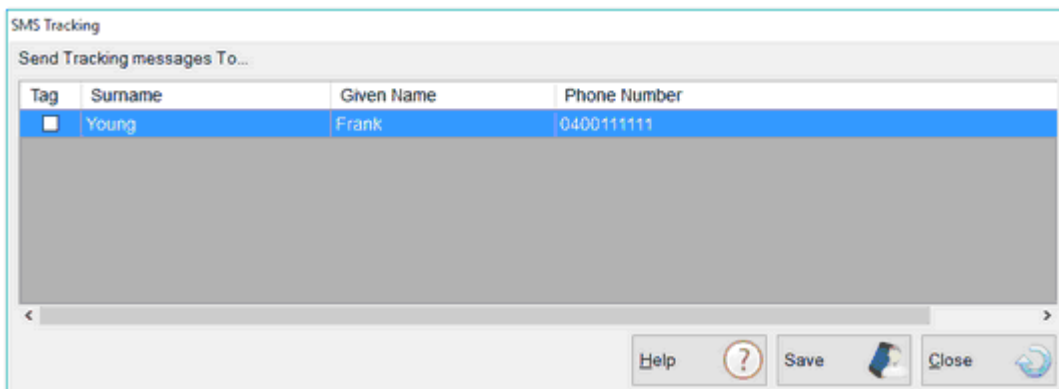


## Tracking

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.

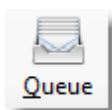
## Save Settings

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	29/12/2015	\$0.08	0400123456	Allwright Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Angel Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Anglin Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Barton Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Blackeby Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Blackeby Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Brown Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Chapman Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Collins Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Dimsey Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Dobber Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Eadon Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Edwards Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Flemming Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	French Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Gordan Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Graham Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Gray Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Harris Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Jones Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Kean Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Knight Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Leah Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Lynch Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	McGee Family		Roster Reminder, Dear

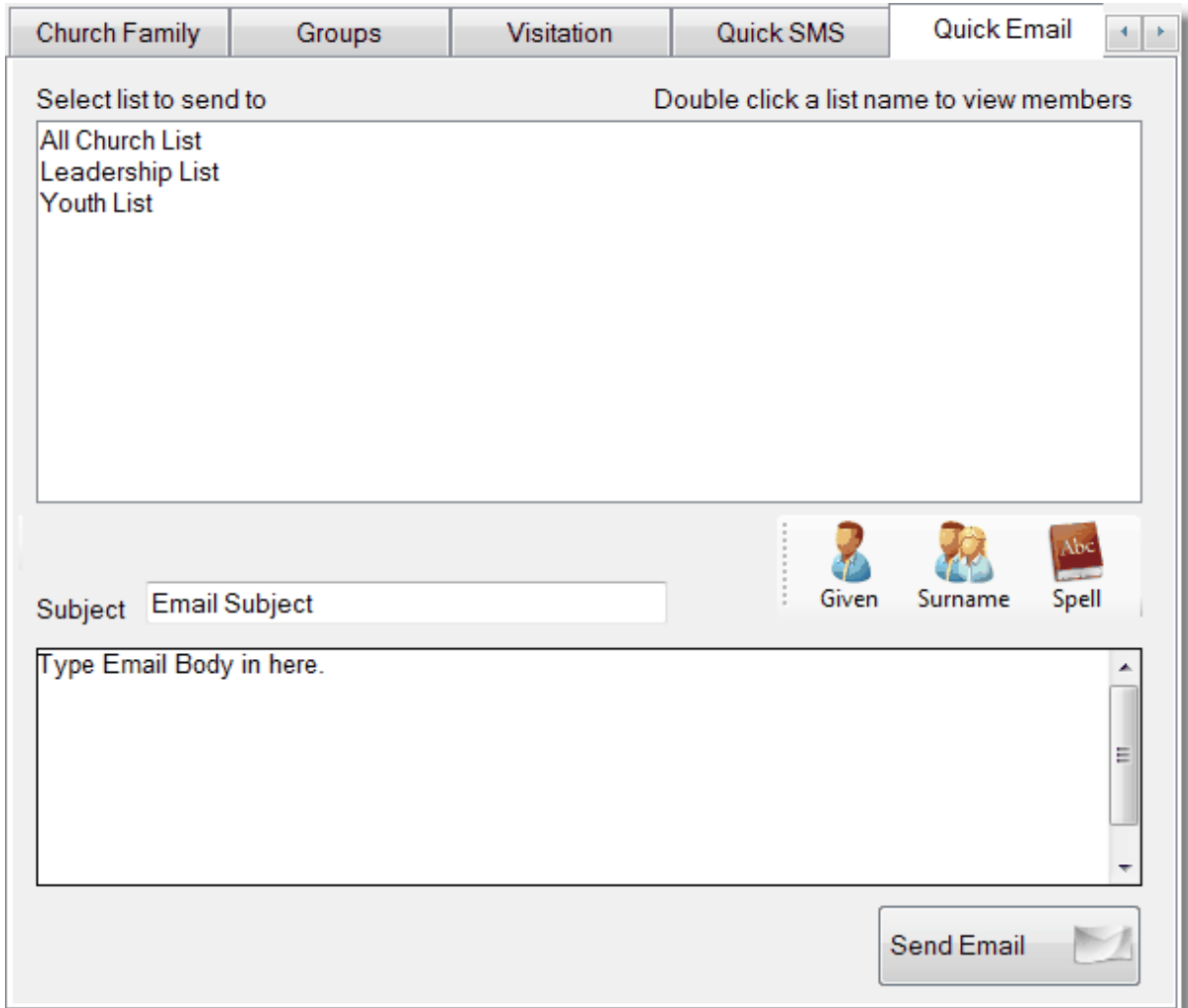
## List

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.



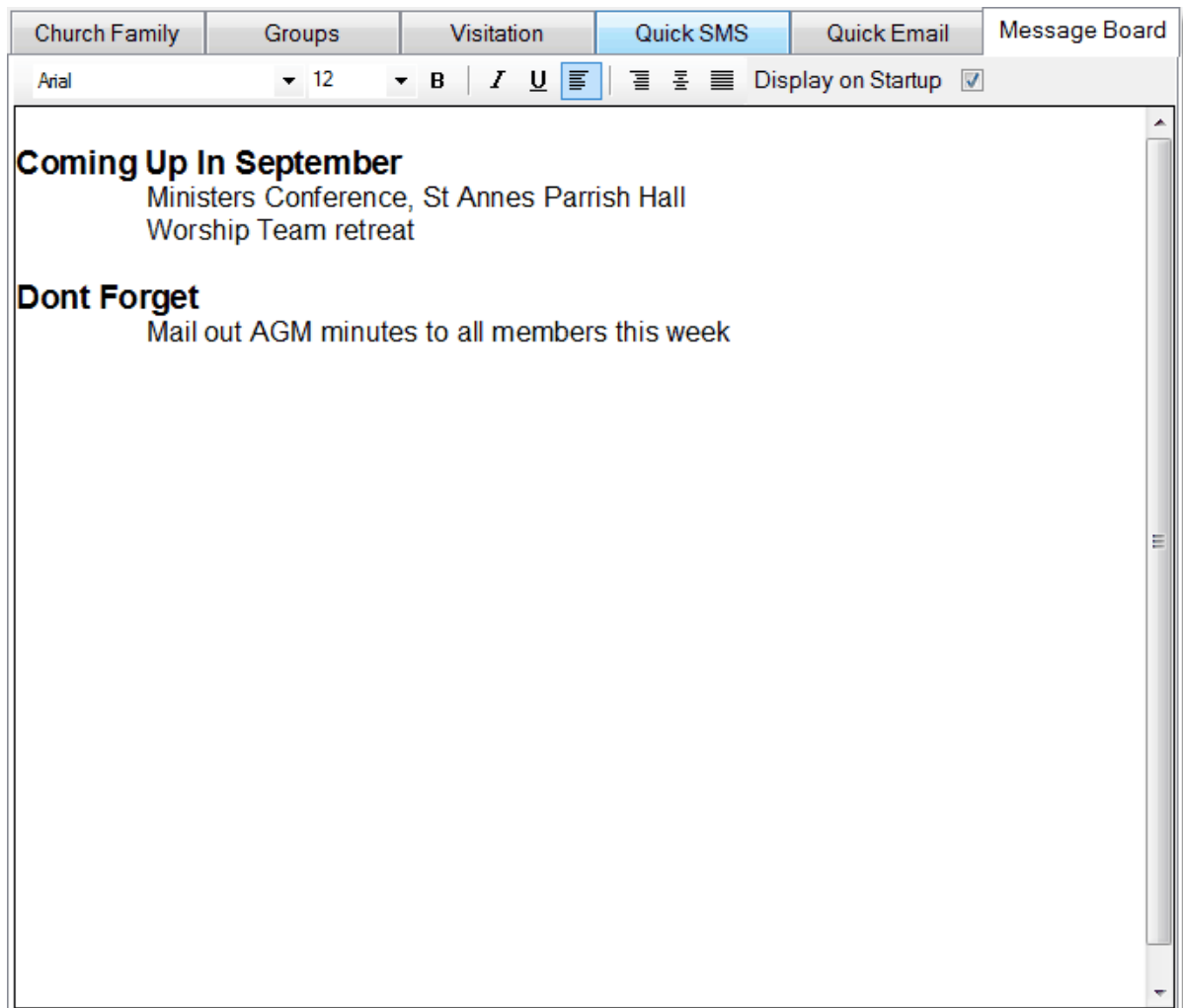
The screenshot shows a software window titled "Quick Email" with a tabbed interface. The active tab is "Quick Email". The window contains the following elements:

- At the top, a list of tabs: "Church Family", "Groups", "Visitation", "Quick SMS", and "Quick Email".
- Below the tabs, a header area with the text "Select list to send to" on the left and "Double click a list name to view members" on the right.
- A list box containing three items: "All Church List", "Leadership List", and "Youth List".
- Below the list box, a "Subject" label followed by a text input field containing "Email Subject".
- To the right of the subject field, three icons with labels: a person icon labeled "Given", a couple icon labeled "Surname", and a book icon labeled "Spell".
- A large text area below the subject field with the placeholder text "Type Email Body in here." and a vertical scrollbar on the right.
- At the bottom right, a "Send Email" button with an envelope icon.

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 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

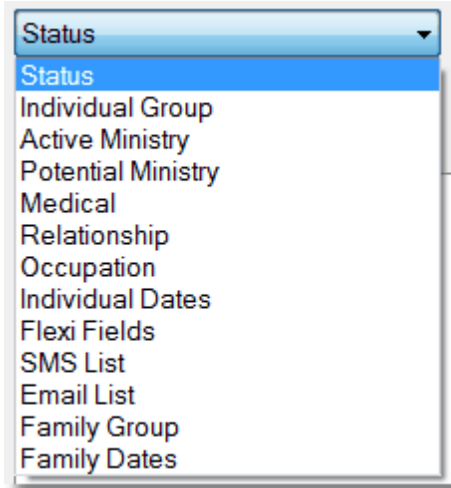
Deacon  
**Elder**  
 Committed Attender  
 Occasional Attender

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.



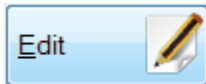
## Open File



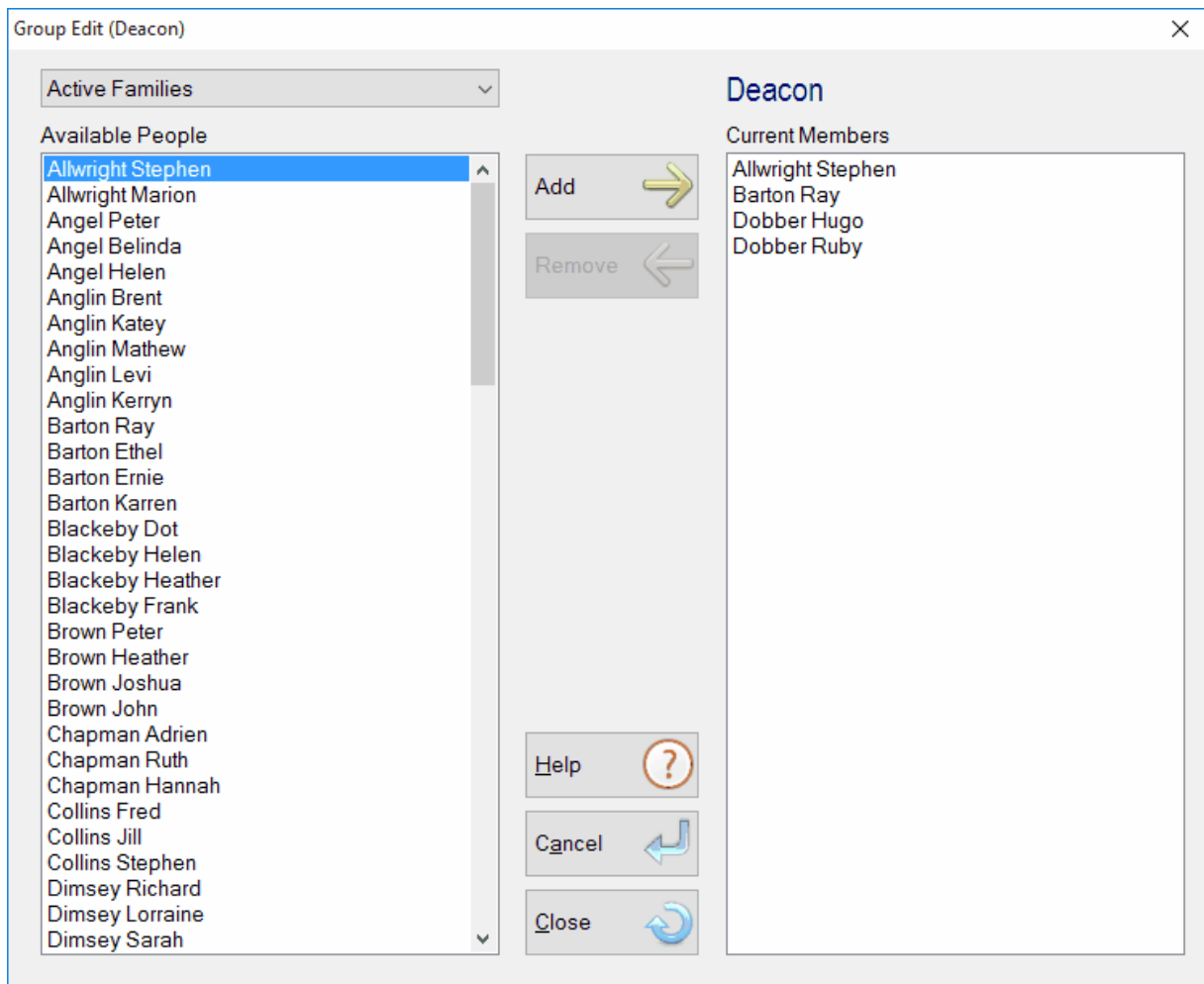
Press the Open File button to open the selected family file on the currently highlighted person.

*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



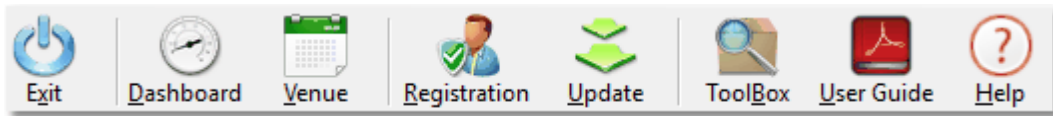
Press the Map button to load the current person / family address into a popular web based mapping program. See also [Map](#) for more details.

## 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.



## 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)

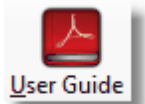
Permanent Registration Key:  (This key is supplied after you have registered with us)

## Toolbox



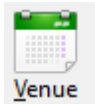
The Toolbox is available from just about all areas of Pastoral Care. Click [Toolbox](#) for more information on what this feature is used for.

## User Guide



Our complete User Guide is available in the program folder for Pastoral Care 14. 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.

## Venue



The Venue button on the main menu toolbar opens a calendar view of any venue / room bookings what you have in the [Venue Booking](#) feature.

See [Venue \(Calendar View\)](#) for full details.

## Dashboard

The Dashboard gives you a quick overview of whats going on at your church. Alerts on Dates, Stats on Groups, Families, Individuals, Dates etc, Roll, Finance Weekly just to name a few.



The following window is the Dashboard window. Click on each part of this window to learn more.

Pastoral Care Dashboard (Church 1) (Belling Street Fellowship)

File Help

Close Default Filters ToolBox Help

Double Click on any Statistic or Details to reveal further information

Pastoral Care last backup was created on... 02/12/2012 09:21 AM

Backup History Gauge Chart

### People Analysis

Church Analysis			Age			Individual Condition		
	Total	%		Total	%		Total	%
Total People	114	100	0 - 5	7	6.1	Active	114	100
Adults	87	76.3	5 - 10	10	8.8	Privacy Request	0	0
Children	27	23.7	10 - 15	9	7.9	Prospect	0	0
Adult Male	39	34.2	15 - 20	5	4.4	Archive	0	0
Adult Female	47	41.2	20 - 25	14	12.3	Contact	0	0
Child Male	9	7.9	25 - 30	7	6.1	Deceased	0	0
Child Female	18	15.8	30 - 35	6	5.3			
Male Total	48	42.1	35 - 40	8	7			
Female Total	65	57	40 - 45	9	7.9			
Unknown	1	0.9	45 - 50	8	7			
Single Adults	28	24.6	50 - 55	6	5.3			
Single Parents	1	0.9	55 - 60	9	7.9			
Couple, No Children	16	14	60 - 65	5	4.4			
Couple with Children	42	36.8	65 - 70	4	3.5			
Widower, no Children	0	0	70 - 75	0	0			
Widower, with Children	1	0.9	75 - 80	4	3.5			
Adults with Deceased Child	2	1.8	80+	3	2.6			

Family Condition		
	Total	%
Active	32	100
Privacy Request	0	0
Prospect	0	0
Archive	0	0

By default for the Condition analysis Filters ignore Prospect, Archived, Contacts & Deceased. To include these categories for analysis please include them in the Filters.

Enable Individual Surnames

Adult Age Starts at 18

Age Analysis Date Friday .16 October 2015

Average Child Age = 9.7  
Average Adult Age = 45.4  
Average Age = 37.0

Unknown	
	Total
Birth Date Year	0
Birth Date	0

## Toolbar

The Dashboard Toolbar has a few icons on as described below.



Press the Default icon to set the dashboard default page when it is loaded.



All relevant pages on the Dashboard can be filtered to include or excluded selected groups of people.

See [The Filters Window](#) for full details on how to use filters.



The Toolbox icon opens up a menu of useful shortcuts and features.

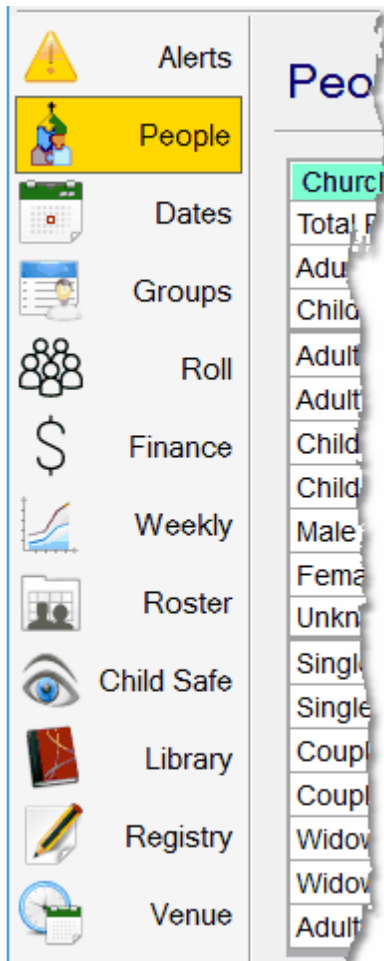
See [Toolbox](#) for more information on this.

## Areas

There are 12 different Dashboard Areas. You can set the default area you want to see by pressing Default on the toolbar after selecting the area you are interested in the most.



Click on each Area listed on the left side of this window to learn more.



### Alerts

The Alerts feature on the Dashboard gives you a quick overview of any Child Safe Alerts, Date Alerts, Venue Booking conflicts and upcoming bookings.



The following window is the **Alerts** Dashboard window. Click on each part of this window to learn more.

Pastoral Care Dashboard (Church 1) (Belling South Baptist Church)

File Help

Close Default Filters ToolBox Help

Double Click on any Statistic or Details to reveal further information

Alerts

View Assets View Conflict Open Booking SMS Email Visitation Report

Child Safe Alerts	Total	Name	Date
Blue CardExpiry Date of Compliance	1	Allwright Stephen	22/06/2019

Date Alerts Total

Asset Alerts Total

Conflicts Booking Start Finish Room Event

Reminder Booking Start Finish Room Event

Child Safe Alerts are setup within the Child Safe program by pressing the Alerts button in the toolbar. Venue Booking Alerts are setup within the Venue Booking program by pressing the Manage button in the toolbar as well as adding reminders to any booking. Date Alerts are configured by choosing the Utilities option at the Main Menu then activating Date Alerts.

### View Assets

While you are in the Alerts window you can press the View Assets button if there is a selected Asset Alert on the Alerts panel.

### View Conflict

While you are in the Alerts window, and you have selected a Venue Booking Conflict, you can press this button to show the conflict.

### Open Booking

While you are in the Alerts window, and you have selected a Venue Booking Reminder, you can press this button to Open the [Venue Booking](#) program and show the selected booking.

### SMS

While you are in the Alerts window, and you have selected an individual that has an alert displayed on the one of the dates or Child Safe alerts, you can press SMS to load the [SMS Manager](#) to send a text message to the selected person / family.

### Email

While you are in the Alerts window, and you have selected an individual that has an alert displayed on the one of the dates or Child Safe alerts, you can press Email to load the [Email Manager](#) to send an email message to the selected person / family.



## Visitation

While you are in the Alerts window, and you have selected an individual that has an alert displayed on the one of the dates or Child Safe alerts, you can press Visitation to load the [Visitation Management](#) window to record a visitation request for the selected individual / family.

## Report

While you are in the Alerts window, and you have selected an individual that has an alert displayed on the one of the dates or Child Safe alerts, you can press Report to load the standard Pastoral Care reports selection window and create a report on all the people in that alert category.

## Alert Dashboard Data

Each of the areas on the alerts page shows different information. The data shown on the Alerts Dashboard page is described below.

### Child Safe

Child Safe Alerts	Total
Blue Card\Expiry Date of Compliance	1

This area shows any Event (Date Based) alerts for the Child Safe area of Pastoral Care. If you select one of the alerts show here, a persons name is shown to the right of this screen, showing you who as that alert against them.

Double Clicking on a persons name will allow you to run any standard Pastoral Care report on that person.

You can also select that persons name, and press EMAIL or SMS to send that person a communication about their Child Safe alert.

### Date Alerts

Date Alerts	Total
Birth Date	3
Wedding Date	2

Date Alerts are Individual, Family, and Birthday Dates that you have decided you want to monitor. To select what dates you want to monitor use the [Date Alerts](#) area on the Utilities Tab.

If you select one of the alerts show here, a persons name is shown to the right of this screen, showing you who as that alert against them.

Double Clicking on a persons name will allow you to run any standard Pastoral Care report on that person.

You can also select that persons name, and press EMAIL or SMS to send that person a communication about their Child Data alert.

Asset Alerts	Total
Mobiles	1

Asset Alerts show when an alert for an asset Compliance Date that is about to expire based on the rules set in the Asset Manager.

## Venue Conflict Alerts

Conflicts	Booking	Start	Fr.
1	Sunday, 18 October 2015	09:00 AM	
1	1st,2nd,3rd,4th,5th Sunday of every Month	09:30 AM	

Venue Conflict alerts show when more than one venue booking occurs at the same time or with overlapping / conflicting times.

Double Clicking on a conflict here will open the [Venue Booking](#) feature of Pastoral Care where you can adjust or change any settings to avoid the conflict.

## Venue Booking Alerts

Reminder	Booking	Start
1 day	1st,2nd,3rd,4th,5th Sunday of every Month	09:30 AM

Venue Booking alerts show you when an event / booking is coming up. You can manage the display of event alerts in the [Venue Booking](#) feature of Pastoral Care.

## People

The Dashboard screen for People is shown below. This shows general demographic type statistics on Age Brackets, Types of People and Individual / Family Conditions.



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

Pastoral Care Dashboard (Church 1) (Belling Street Fellowship)

File Help

Close Default Filters ToolBox Help

Double Click on any Statistic or Details to reveal further information

Pastoral Care last backup was created on... 02/12/2012 09:21 AM

Backup History Gauge Chart

### People Analysis

Church Analysis	Total	%
Total People	114	100
Adults	87	76.3
Children	27	23.7
Adult Male	39	34.2
Adult Female	47	41.2
Child Male	9	7.9
Child Female	18	15.8
Total	48	42.1
Married	65	57
Single	1	0.9
Single Adults	28	24.6
Single Parents	1	0.9
Couple, No Children	16	14
Couple with Children	42	36.8
Widower, no Children	0	0
Widower, with Children	1	0.9
Adults with Deceased Child	2	1.8

Age	Total	%
0 - 5	7	6.1
5 - 10	10	8.8
10 - 15	9	7.9
15 - 20	5	4.4
20 - 25	14	12.3
25 - 30	7	6.1
30 - 35	6	5.3
35 - 40	8	7
40 - 45	9	7.9
45 - 50	8	7
50 - 55	6	5.3
55 - 60	9	7.9
60 - 65	5	4.4
65 - 70	4	3.5
70 - 75	0	0
75 - 80	4	3.5
80+	3	2.6

Individual Condition	Total	%
Active	114	100
Privacy Request	0	0
Prospect	0	0
Archive	0	0
Contact	0	0
Deceased	0	0

Family Condition	Total	%
Active	32	100
Privacy Request	0	0
Prospect	0	0
Archive	0	0

By default for the Condition analysis Filters ignore Prospect, Archived, Contacts & Deceased. To include these categories for analysis please include them in the Filters.

Enable Individual Surnames

Adult Age Starts at 18

Average Child Age = 9.7  
Average Adult Age = 45.4  
Average Age = 37.0

Age Analysis Date: Saturday, 17 October 2015

Unknown	Total
Birth Date Year	0
Birth Date	0

**People Dashboard Data**

Each of the areas on the alerts page shows different information. The data shown on the Alerts Dashboard page is described below.

**Church Analysis**

Church Analysis	Total	%
Total People	114	100
Adults	87	76.3
Children	27	23.7
Adult Male	39	34.2
Adult Female	47	41.2
Child Male	9	7.9

This area shows the breakdown of the church by people types. Such as Adults, Children, Gender, Marital Status etc.

Double clicking on any category here will bring up a list of the people behind that statistic.

**Age Analysis**

Age	Total	%
0 - 5	7	6.1
5 - 10	10	8.8
10 - 15	9	7.9
15 - 20	5	4.4
20 - 25	14	12.3
25 - 30	7	6.1

The Age Analysis uses the Birthdate Information stored in the family file to analyse how old people are in your church.

Double clicking on any age bracket shown here will bring up a list of people behind that statistic.

## Individual Condition

Individual Condition	Total	%
Active	114	100
Privacy Request	0	0
Prospect	0	0
Archive	0	0
Contact	0	0
Decease	0	0

The individual Condition Analysis shows the number of people in each condition category, and what percentage of the church that group represents.

Double clicking on any condition shown here will bring up a list of people behind that statistic.

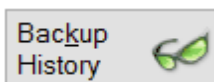
## Family Condition

Family Condition	Total	%
Active	32	100
Privacy Request	0	0
Prospect	0	0
Archive	0	0

The Family Condition Analysis shows the number of Families in each condition category, and what percentage of the church that group represents.

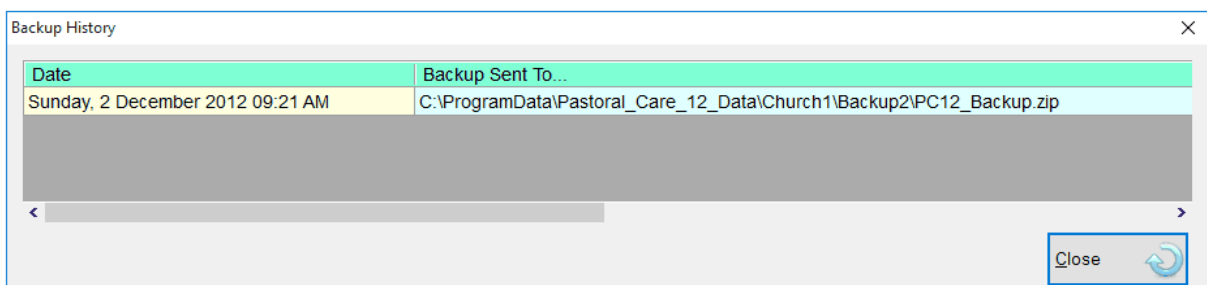
Double clicking on any condition shown here will bring up a list of people behind that statistic.

## Backup History

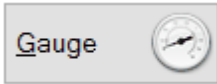


Press the Backup History Button to see a window detailing the history of Backups performed from this computer.

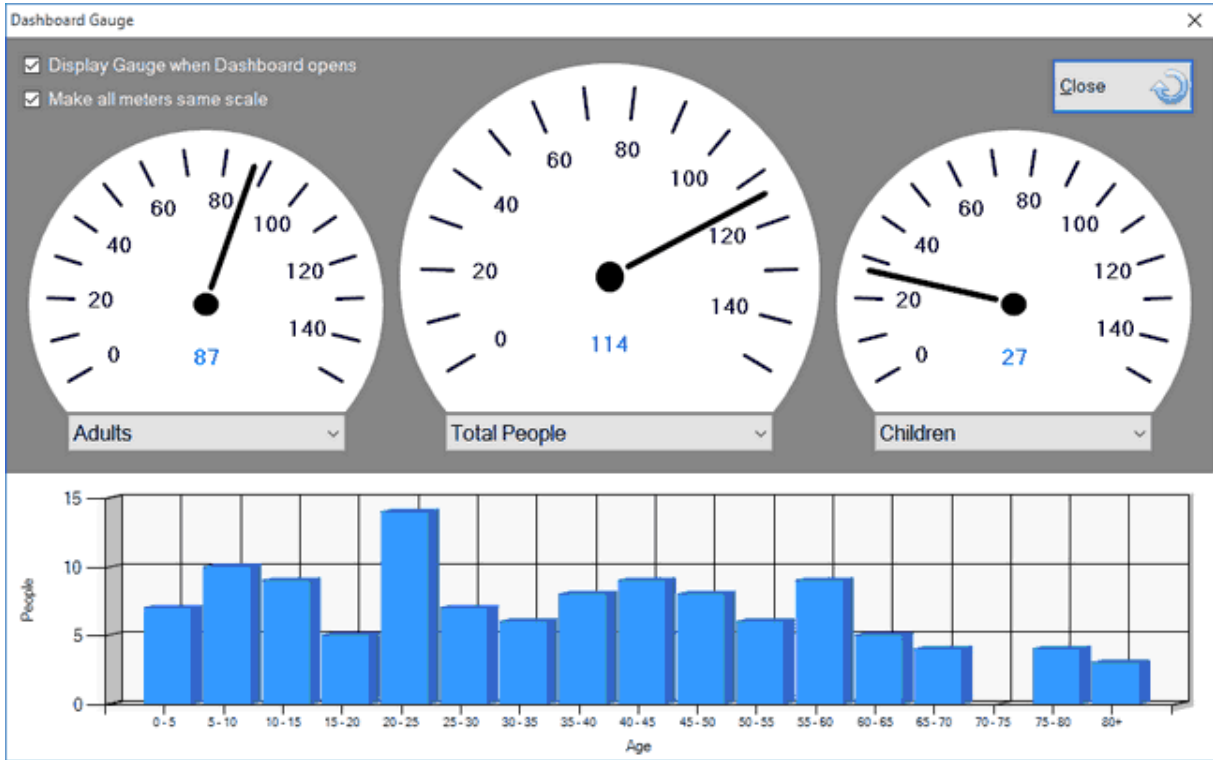
Note: Backups performed on other computers are not shown in this window.



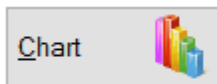
**Gauge**



Press the Gauge button to show the following screen. This screen shows different statistics in a set of Gauges, and also the Age range distribution of your church.



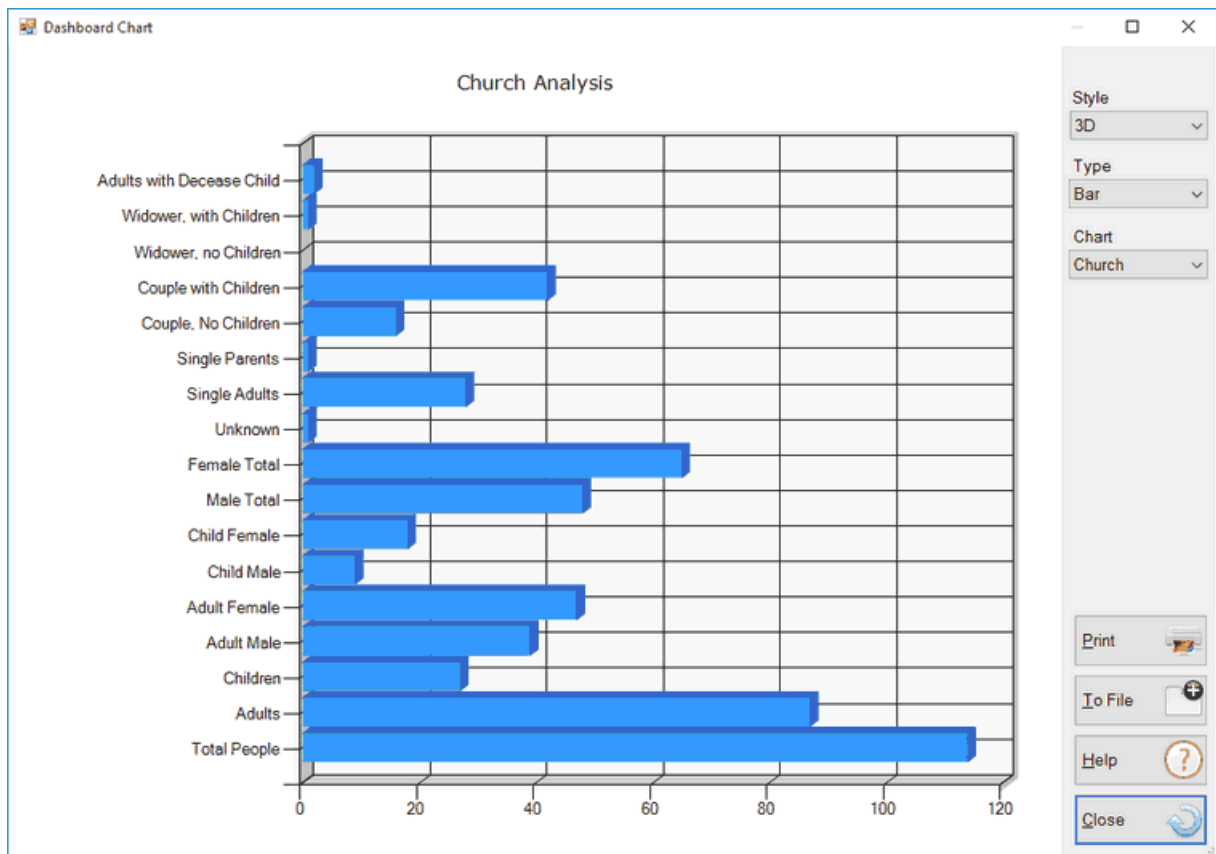
**Chart**



Press the Chart Button to display the following screen.

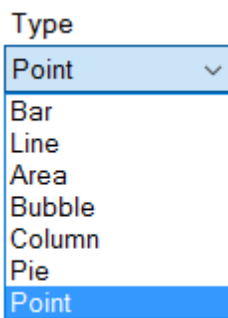


The following window is the People Chart window. Click on each part of this window to learn more.



You can select 2D or 3D chart styles for the Dashboard Area.

You can select from any of the following Chart Types for the Dashboard area.



There are four areas in the People Chart Feature that can be charted. They are:

## Church

The Church Analysis for the Dashboard Chart shows the number of:

Total People, Adults, Children, Genders, and Marital Status's (Such as Couples, Single Adults, Widower etc)

## Age

The Age Analysis for the Dashboard Chart shows the number people in a range of age brackets.

## Individual Condition

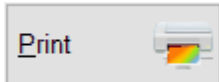
The Individual Condition Analysis for the Dashboard Chart shows the number of people in a range of individual conditions.

This includes: Active, Privacy Request, Prospects, Archived etc

## Family Condition

The Family Condition Analysis for the Dashboard Chart shows the number of Families in a range of Family conditions.

This includes: Active, Privacy Request, Prospects and Archived.



Press the PRINT button here to print the currently displayed Chart.

Press the To File button to save the current chart as a file.

Charts can be saved in a number of standard picture formats.

## Age Calculations

Adult Age Starts at	18	Average Child Age =	9.7	Unknown	Total
Age Analysis Date	Sunday .18 October 2015	Average Adult Age =	45.4	Birth Date Year	0
		Average Age =	37.0	Birth Date	0

The area at the bottom of the People Dashboard Page allows you to set the point at which a person is classed as an adult.

Also show here is some Average Age statistics, and the number of Unknown Birth Date Years and the number of unknown Birth Dates entirely.

## Dates

The Dashboard screen for Dates is shown below. This shows general demographic type statistics on Individual and Family Dates.



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

Pastoral Care Dashboard (Church 1) (Belling Street Fellowship)

File Help

Close Default Filters ToolBox Help

Double Click on any Statistic or Details to reveal further information

Alerts

People

**Dates**

Groups

Roll

Finance

Weekly

Roster

Child Safe

Library

Registry

Venue

### Date Analysis

Enable Individual Surnames Chart

Individual Date

Average (Years) = 36.1

Membership	Period	Total	%
Baptised	0 - 5	0	0
Confirmation	5 - 10	0	0
Christened	10 - 15	0	0
	15 - 20	0	0
	20 - 25	7	21.9
	25 - 30	11	34.4
	30 - 35	2	6.2
	35 - 40	3	9.4
	40 - 45	4	12.5
	45 - 50	0	0
	50 - 55	1	3.1
	55 - 60	2	6.2
	60 - 65	0	0
	65 - 70	0	0
	70 - 75	2	6.2
	75 - 80	0	0
	80+	0	0
	Unkno...	82	

Double Click to see people behind the statistic

Family Date

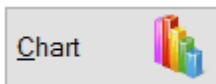
Average (Years) = 45.2

Wedding Date	Period	Total	%
Contact Date	0 - 5	0	0
	5 - 10	0	0
	10 - 15	0	0
	15 - 20	0	0
	20 - 25	2	4.4
	25 - 30	0	0
	30 - 35	8	17.8
	35 - 40	6	13.3
	40 - 45	7	15.6
	45 - 50	12	26.7
	50 - 55	6	13.3
	55 - 60	0	0
	60 - 65	0	0
	65 - 70	0	0
	70 - 75	2	4.4
	75 - 80	2	4.4
	80+	0	0
	Unkno...	69	

Double Click to see people behind the statistic

Analysis Date Sunday , 18 October 2015

**Chart**

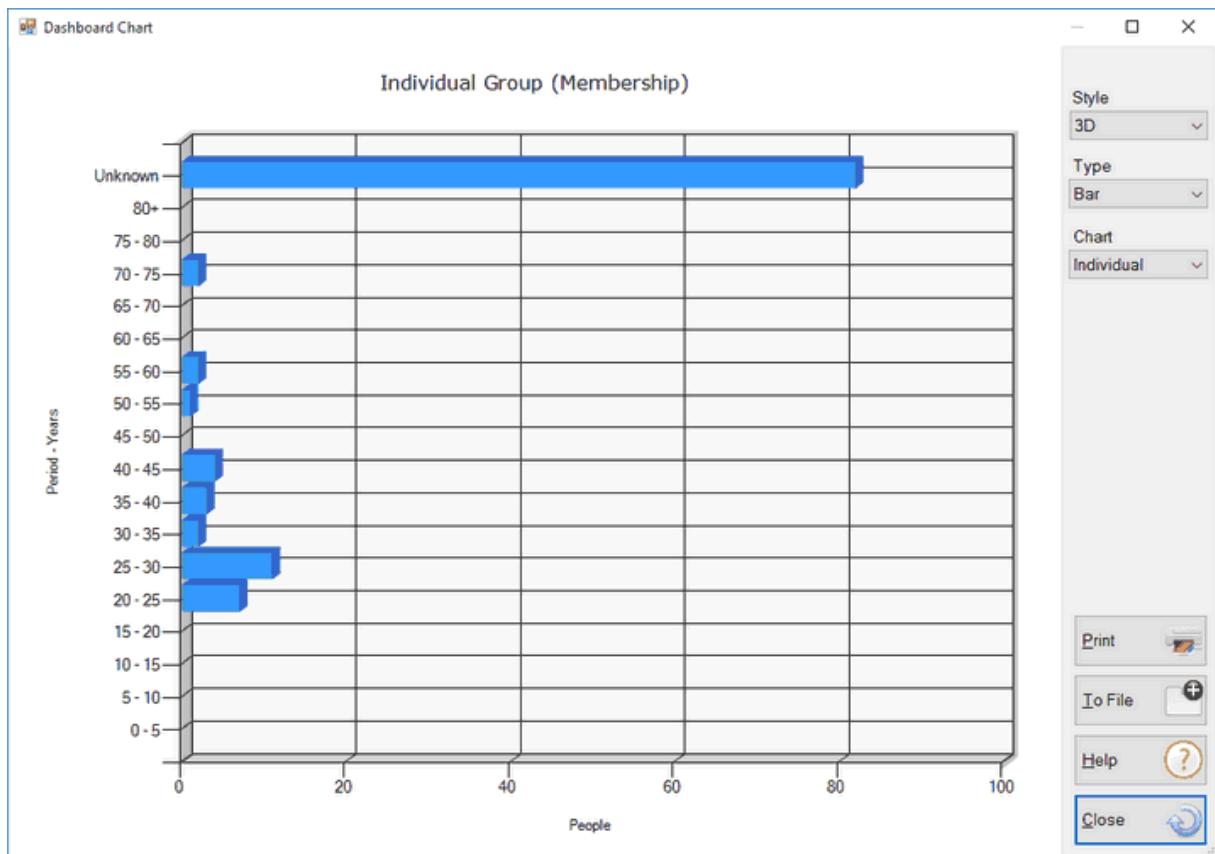


Press the Chart Button to display the following screen.



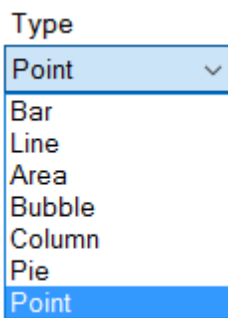
The following window is the **Alerts** Dashboard window. Click on each part of this window to learn more.





You can select 2D or 3D chart styles for the Dashboard Area.

You can select from any of the following Chart Types for the Dashboard area.



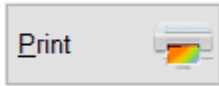
There are two areas in the Dates Chart Feature that can be charted. They are:

### Individual

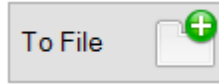
If you select Individual, the currently selected Individual Date statistic will be shown on the chart.

### Family

If you select Family, the currently selected Family Date statistic will be shown on the chart.



Press the PRINT button here to print the currently displayed Chart.



Press the To File button to save the current chart as a file.

Charts can be saved in a number of standard picture formats.

### Individual Surname

Enable Individual Surnames

Tick this option to let Pastoral Care display Individual Surnames where they exist when you have double clicked on a statistic to see the "people behind the statistic"

### Date Dashboard Data

The information shown on the Date Dashboard will be unique to your own church setup, depending on the Family and Individual Dates that you are tracking in the Family File.

Our sample below gives you a good example of what information can be displayed, if you have collected date information against Individual and Family Dates.

NOTE: at the bottom of this window, you can change the Analysis date from "Today" being the current date, to another date. This date is used to calculate how old a date is when compared to "Today" or whatever date you enter as the Analysis Date.

### People Behind the Statistic

Double Clicking on one of the statistics in this area will bring up a window showing the people that make up that statistic.

Individual Date		Average (Years) = 36.1			Family Date		Average (Years) = 37.8		
	Membership	Period	Total	%		Wedding Date	Period	Total	%
	Baptised	0 - 5	0	0		Contact Date	0 - 5	0	0
	Confirmation	5 - 10	0	0			5 - 10	0	0
	Christened	10 - 15	0	0			10 - 15	0	0
		15 - 20	0	0			15 - 20	0	0
		20 - 25	7	21.9			20 - 25	2	12.5
		25 - 30	11	34.4			25 - 30	0	0
		30 - 35	2	6.2			30 - 35	0	0
		35 - 40	3	9.4			35 - 40	8	50
		40 - 45	4	12.5			40 - 45	6	37.5
		45 - 50	0	0			45 - 50	0	0
		50 - 55	1	3.1			50 - 55	0	0
		55 - 60	2	6.2			55 - 60	0	0
		60 - 65	0	0			60 - 65	0	0
		65 - 70	0	0			65 - 70	0	0
		70 - 75	2	6.2			70 - 75	0	0
		75 - 80	0	0			75 - 80	0	0
		80+	0	0			80+	0	0
		Unkno...	82				Unkno...	98	

Analysis Date Sunday .18 October 2015 ▾

**Groups**

Shown below is the Groups Dashboard page. This page shows the numbers of people in selected group areas, such as Status, Individual Groups, Ministry, Family Groups, Medical etc



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

Pastoral Care Dashboard (Church 1) (Belling Street Fellowship)

File Help

Close Default Filters ToolBox Help

Double Click on any Statistic or Details to reveal further information

Alerts

People

Dates

**Groups**

Roll

Finance

Weekly

Roster

Child Safe

Library

Registry

Venue

**Group Analysis**  Enable Individual Surnames **Chart**

Status	Total	%
Individual Group		
Active Ministry		
Potential Ministry		
Medical		
Relationship		
Occupation		
Individual Dates		
Individual Dates Tag		
Flexi Fields		
Flexi Fields Tag		
SMS List		
Email List		
Family Group		
Family Dates		
Family Dates Tag		

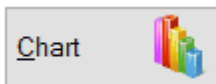
Group	Total	%
Deacon	4	3.5
Elder	4	3.5
Committed Attender	24	21.1
Occasional Attender	21	18.4

Double Click to see people behind the statistic

Order by User Setup Order  
 Order Alphabetically

	Total	%
Total People Found	114	100
People with Status	47	41.2
People without a Status	67	58.8

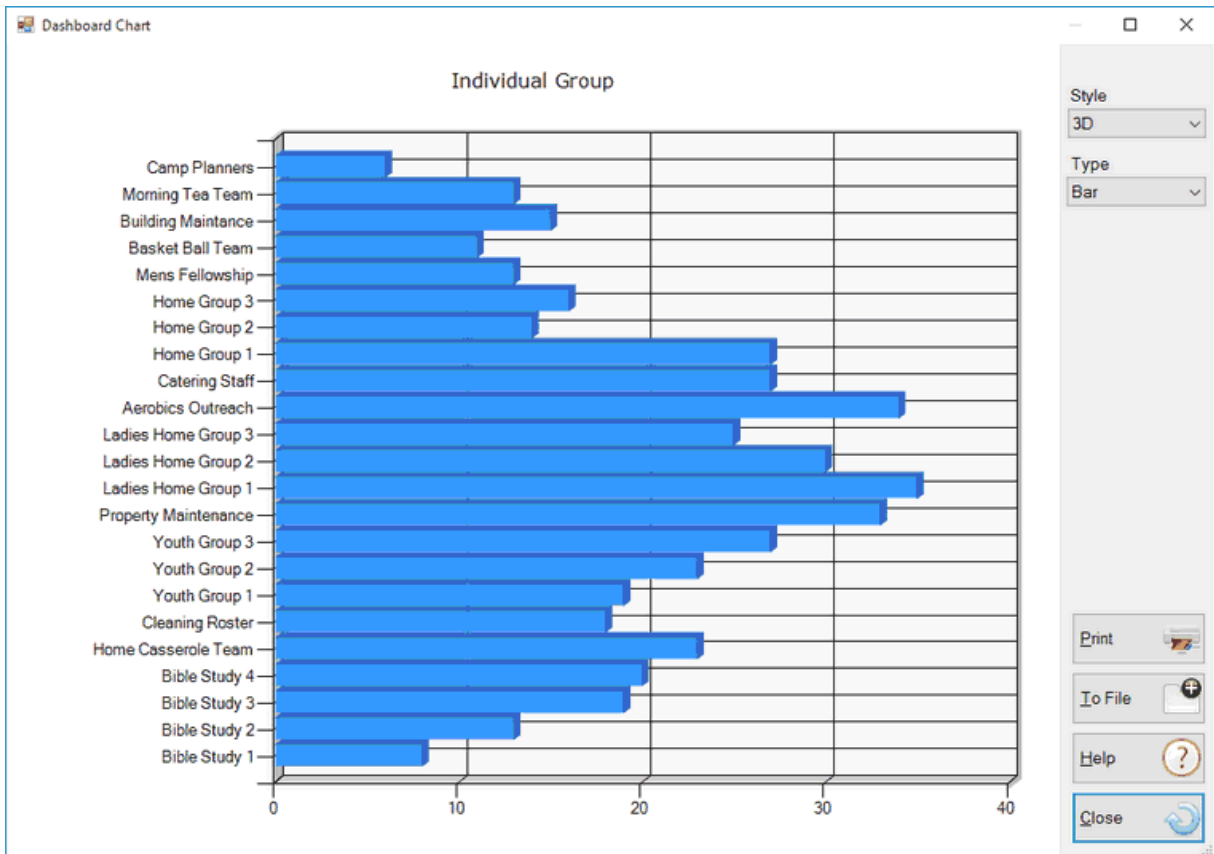
## Chart



Press the Chart Button to display the following screen.

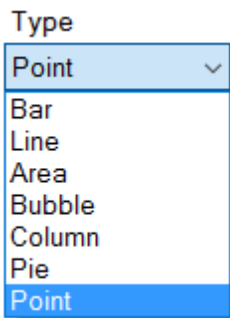


The following window is the Group Chart window. This shows Individual Groups charted. Click on each part of this window to learn more.



You can select 2D or 3D chart styles for the Dashboard Area.

You can select from any of the following Chart Types for the Dashboard area.




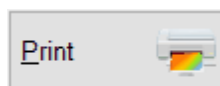
The number of groups available to chart are only limited by how many different types of groups you use, and how many are setup.

When you press the Chart Button on the group dashboard area, you are presented with a tick list of groups you can chart. These will be pre-filled from the selected group, such as Status, Ministry, Individual Groups etc.

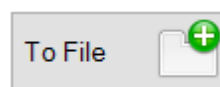
Available Groups for Charting

- Bible Study 1
- Bible Study 2
- Bible Study 3
- Bible Study 4
- Home Casserole Team
- Cleaning Roster
- Youth Group 1
- Youth Group 2
- Youth Group 3
- Property Maintenance
- Ladies Home Group 1
- Ladies Home Group 2
- Ladies Home Group 3
- Aerobics Outreach
- Catering Staff
- Home Group 1
- Home Group 2
- Home Group 3
- Mens Fellowship
- Basket Ball Team
- Building Maintance
- Morning Tea Team
- Camp Planners

Continue 



Press the PRINT button here to print the currently displayed Chart.



Press the To File button to save the current chart as a file.

Charts can be saved in a number of standard picture formats.

### Individual Surname

Enable Individual Surnames

Tick this option to let Pastoral Care display Individual Surnames where they exist when you have double clicked on a statistic to see the "people behind the statistic"

### Group Dashboard Data

The information shown on the Group Dashboard will be unique to your own church setup, depending on the different groups that you are tracking in the Family File.

Our sample below gives you a good example of what information can be displayed, if you have collected group

information against Individuals and families.

### People Behind the Statistic

Double Clicking on one of the statistics in this area will bring up a window showing the people that make up that statistic.

**Group Analysis**
 Enable Individual Surnames
Chart

Status

- Individual Group
- Active Ministry
- Potential Ministry
- Medical
- Relationship
- Occupation
- Individual Dates
- Individual Dates Tag
- Flexi Fields
- Flexi Fields Tag
- SMS List
- Email List
- Family Group
- Family Dates
- Family Dates Tag

Group	Total	%
Deacon	4	3.5
Elder	4	3.5
Committed Attender	24	21.1
Occasional Attender	21	18.4

	Total	%
Total People Found	114	100
People with Status	47	41.2
People without a Status	67	58.8

Order by User Setup Order

Order Alphabetically

### Roll

The Roll Dashboard page shows attendance statistics at a glance. This will only be populated if you have been taking and recording a [Roll](#) for attendance.



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

Pastoral Care Dashboard (Church 1) (Belling Street Fellowship)

File Help

Close Default Filters ToolBox Help

Double Click on any Statistic or Details to reveal further information

Roll Project: Main Roll 1 Date: 25/12/2016 Chart

Alerts People Dates Groups **Roll** Finance Weekly Roster Child Safe Library Registry Venue

Roll Analysis

Enable Individual Surnames

Specific Day Record (25/12/2016)

Event	Attend	Visitors	Total
Morning am1	43	10	53
Morning am2	36	20	56
Evening	57	30	87

Absent State	Total
Absent	9
Sick	3
Holiday	7
Other	0

Percentage	People
0% - 5%	3
6% - 10%	0
11% - 15%	1
16% - 20%	3
21% - 25%	1
26% - 30%	1
31% - 35%	14
36% - 40%	18
41% - 45%	34
46% - 50%	15
51% - 55%	8
56% - 60%	5
61% - 65%	6
66% - 70%	2
71% - 75%	0
76% - 80%	0
81% - 85%	0
86% - 90%	0
91% - 95%	0
96% - 100%	0

Roll Attendance Analysis

Look back 23 Records

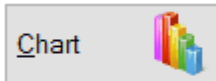
Attendance for Analysis

Morning am1  
 Morning am2  
 Evening

Average Attendance = 42.2%

Analysis Date From 17/07/2016 To 25/12/2016

**Chart**

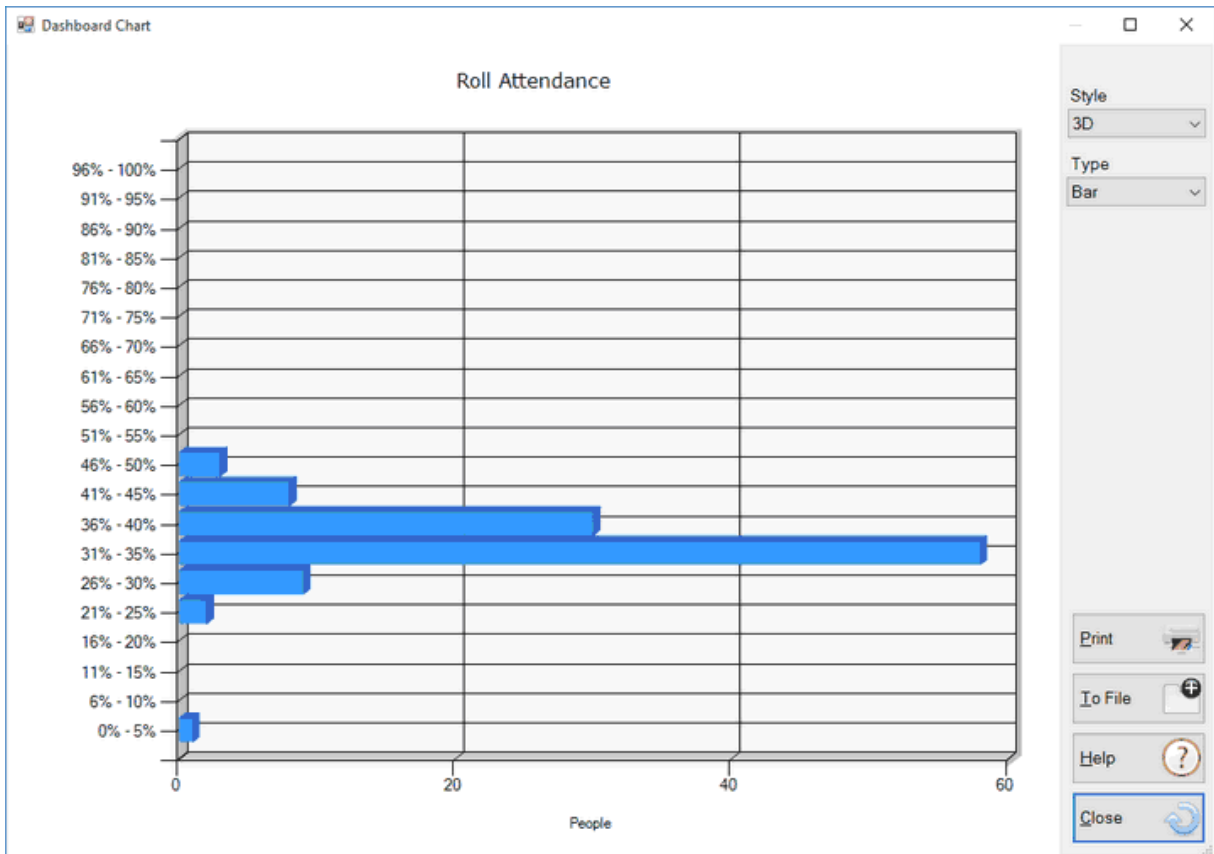


Press the Chart Button to display the following screen.



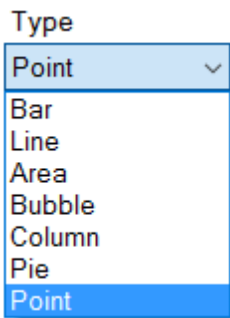
The following window is the Roll Chart window. This shows the Average Percentage attendance for the pre-selected lookback period, and the selected project / events combination.



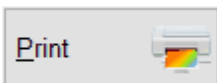


You can select 2D or 3D chart styles for the Dashboard Area.

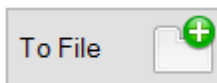
You can select from any of the following Chart Types for the Dashboard area.



This area shows the Average Attendance in percentages for the pre-selected lookback period, and a selection of Roll Project / Events.



Press the PRINT button here to print the currently displayed Chart.



Press the To File button to save the current chart as a file.

Charts can be saved in a number of standard picture formats.

### Roll Project

Roll Project  
Main Roll 1

Select your Roll Project for running the Dashboard Statistics on.

### Date

Date  
25/12/2016

Select a date for displaying the following Roll Statistics...

[Specific Day](#)

[Absent State](#)

[Percentage.](#)

### Enable Individual Surname

Enable Individual Surnames

Tick this option to let Pastoral Care display Individual Surnames where they exist when you have double clicked on a statistic to see the "people behind the statistic"

### Look Back

Look back  Records

Enter the number of records (Roll Dates) to look back from the selected [Date](#). This is used to calculate the Percentage Average Attendance for that period.

Period = Selected Date back X number of records.

### Selected Attendance

Tick the number of events that you want to analyse for the Percentage Attendance statistic. If you tick more than one event, a person would need to be AT each of those on one record (date) to be considered as attending.

Attendance for Analysis

<input checked="" type="checkbox"/>	Morning am1
<input type="checkbox"/>	Morning am2
<input type="checkbox"/>	Evening

### Data Analysis

This shows the number of Attended, and the number of Visitors For:

The Selected [Roll Project](#)

The selected [Date](#)

All current Events in the Project

Specific Day Record (25/12/2016)

Event	Attend	Visitors	Total
Morning am1	43	10	53
Morning am2	36	20	56
Evening	57	30	87

This shows the number of people in each Absent category for:

The Selected [Roll Project](#)

The selected [Date](#)

All current Events in the Project

Absent State	Total
Absent	9
Sick	3
Holiday	7
Other	0

This shows the number of people who's average attendance fits within a range of Percentage brackets. These statistics are worked out on :

The Selected [Roll Project](#)

The selected [Date](#)

The number of records in the [Look Back](#) period from that date

The [Selected Attendance](#) Event

Percentage	People
0% - 5%	7
6% - 10%	0
11% - 15%	0
16% - 20%	14
21% - 25%	0
26% - 30%	0
31% - 35%	37
36% - 40%	0

This data shows the number of Unknown people, the number of unique people attending, and the number of people who attended all events for the single selected [Date](#)

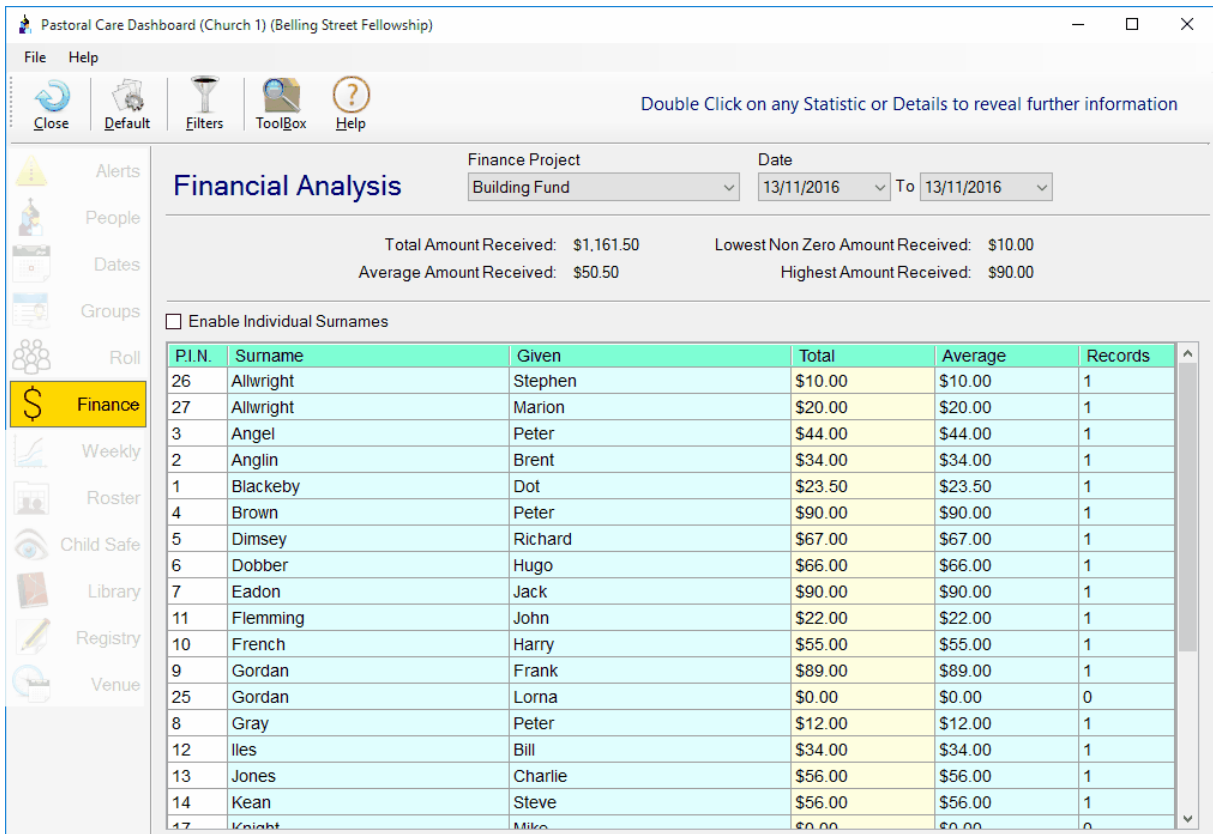
	Total
Unknown	4
Different People Attending	91
Attended All Events	5

## Finance

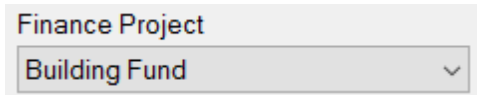
The Finance Dashboard page shows Financial statistics at a glance. This will only be populated if you have been recording data in the [Financial Records](#) area of Pastoral Care.



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

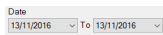


**Finance Project**



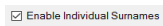
Select the Finance Project that you want to see information on.

**Date Range**



Select the date range that you want to see information over for the selected Finance Project.

**Enable Individual Surnames**



Tick this option to let Pastoral Care display Individual Surnames where they exist when you have double clicked on a statistic to see the "people behind the statistic"

**Data Area**

This area shows the giving for each person who has given money to the selected Finance Project over the selected Date Range.

If you are using Security ([Setup Security](#)) to manage the visibility of Financial Data, this form will be sensitive to that setting.

P.I.N.	Surname	Given	Total	Average	Record
26	Allwright	Stephen	\$10.00	\$10.00	
27	Allwright	Marion	\$20.00	\$20.00	
3	Angel	Peter	\$44.00	\$44.00	
2	Anglin	Brent	\$34.00	\$34.00	
1	Blackeby	Dot	\$23.50	\$23.50	
4	Brown	Peter	\$90.00	\$90.00	
5	Dimsey	Richard	\$67.00	\$67.00	

**Weekly**

The Weekly Dashboard page shows Weekly Statistics at a glance. This will only be populated if you have been recording data in the [Weekly Statistics](#) area of Pastoral Care.



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

Pastoral Care Dashboard (Church 1) (Belling Street Fellowship)

File Help

Close Default Filters ToolBox Help

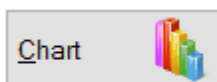
Double Click on any Statistic or Details to reveal further information

Weekly Project: Sunday main Date: 18/09/2016 To: 25/12/2016 Chart

Finance Category	Total	Average	Highest	Lowest
AM Offering	\$31,021.00	\$2,068.07	\$4,250.00	\$1,025.00
S/S Offering	\$301.90	\$20.13	\$29.50	\$11.25
Building Fund	\$941.00	\$85.55	\$200.00	\$25.00
Community Chest	\$825.00	\$75.00	\$250.00	\$10.00
O/S Missions	\$2,780.00	\$185.33	\$450.00	\$36.00
Local Missions	\$1,403.00	\$107.92	\$250.00	\$21.00

Attendance Category	Total	Average	Highest	Lowest
AM Attendance	5648	377	536	280
S/S Attendance	1545	103	136	50
Evening Attendance	703	47	150	9
Home Group 1	513	34	42	28
Home Group 2	390	26	32	20
Home Group 3	271	18	26	6
Baptised	2	1	1	1
Born Again	9	2	4	1
Membership	8	3	5	1

**Chart**

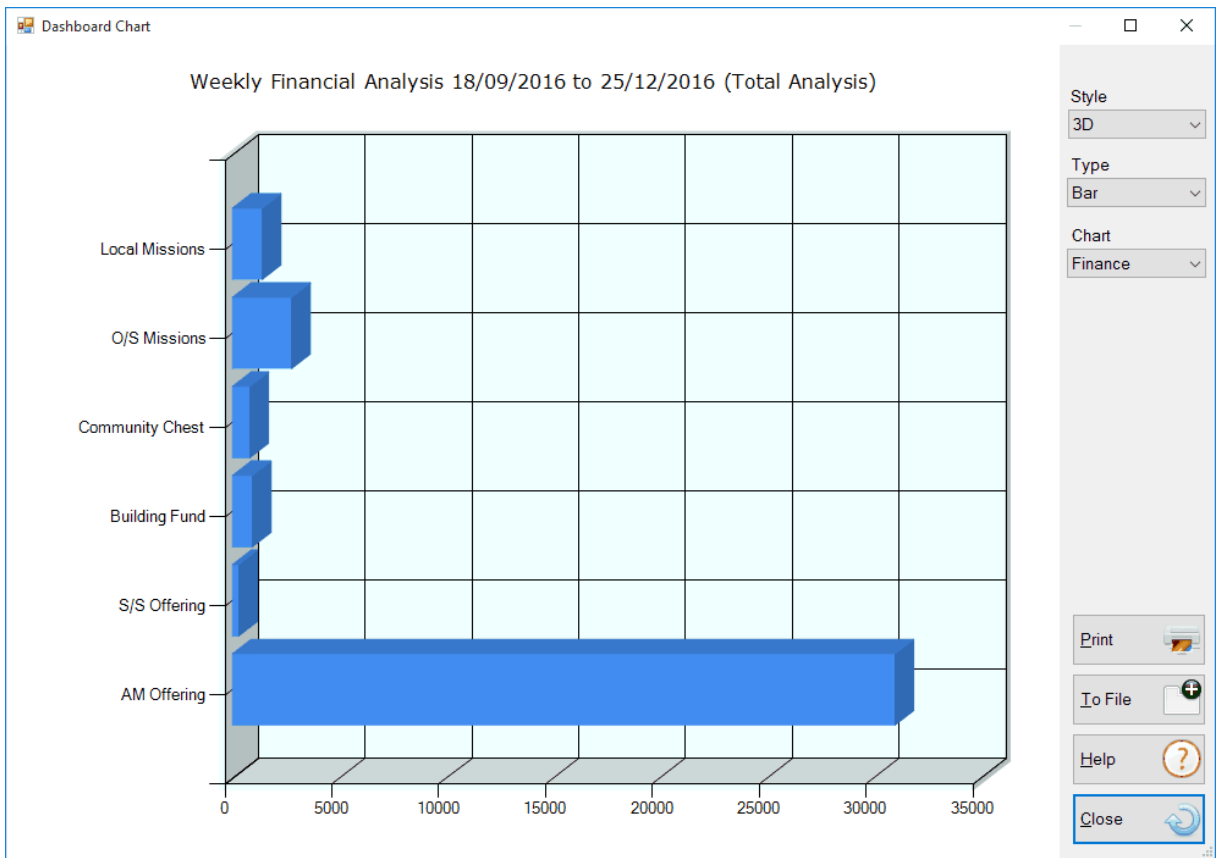


Press the Chart Button to display the following screen.

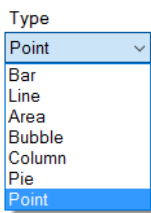


The following window is the Weekly Chart window. This shows either Total or Average Attendance /

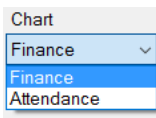
Finance metrics for the pre-selected lookback period, and the selected project / attendance and finance options.



You can select 2D or 3D chart styles for the Dashboard Area.

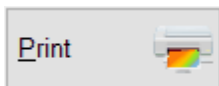
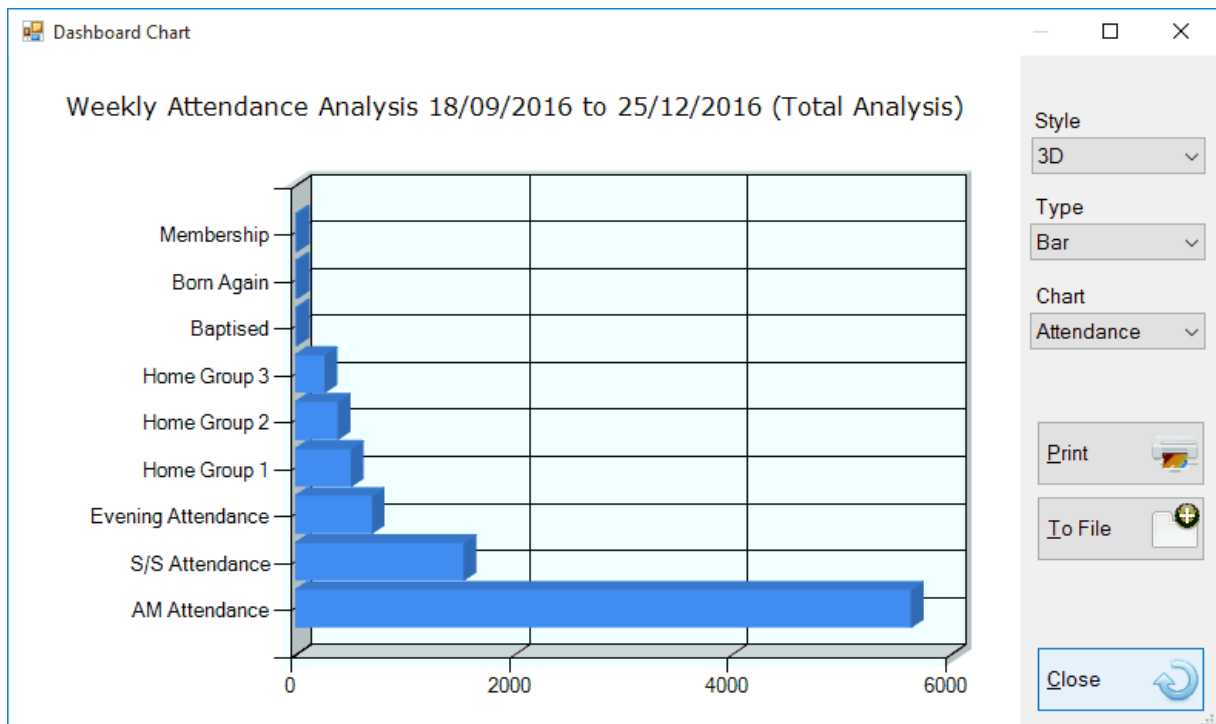


You can select from any of the following Chart Types for the Dashboard area.

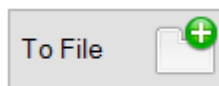


Select either Finance Categories or Attendance Categories to place on the chart.

This area shows the Average Attendance in percentages for the pre-selected lookback period, and a selection of Roll Project / Events.



Press the PRINT button here to print the currently displayed Chart.



Press the To File button to save the current chart as a file.

Charts can be saved in a number of standard picture formats.

### Weekly Project



Select the Weekly Project that you want to see on the Dashboard screen.

### Date

 To 

Select the date range that you want to see information over for the selected Weekly Project.



## Data Area

This area shows the Weekly Statistics for the selected Weekly Project over the selected Date Range.

Finance Category	Total	Average	Highest	Lowest
AM Offering	\$31,021.00	\$2,068.07	\$4,250.00	\$1,025.00
S/S Offering	\$301.90	\$20.13	\$29.50	\$11.25
Building Fund	\$941.00	\$85.55	\$200.00	\$25.00
Community Chest	\$825.00	\$75.00	\$250.00	\$10.00
O/S Missions	\$2,780.00	\$185.33	\$450.00	\$36.00
Local Missions	\$1,403.00	\$107.92	\$250.00	\$21.00

Attendance Category	Total	Average	Highest	Lowest
AM Attendance	5648	377	536	280
S/S Attendance	1545	103	136	50
Evening Attendance	703	47	150	9
Home Group 1	513	34	42	28
Home Group 2	390	26	32	20
Home Group 3	271	18	26	6
Baptised	2	1	1	1
Born Again	9	2	4	1
Membership	8	3	5	1

## Roster

The Roster Dashboard page shows Roster participation at a glance. This will only be populated if you have been recording data in the [Rosters](#) area of Pastoral Care.



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

Pastoral Care Dashboard (Church 1) (Belling Street Fellowship)

File Help

Close Default Filters ToolBox Help

Double Click on any Statistic or Details to reveal further information

Roster Event: 9:30am Traditional  Enable Individual Surnames

Rostered On Statistics: 04/01/2016 To 26/12/2016

Amount	Event	Duty
8	9:30am Traditional	Music Team
5	9:30am Traditional	Piano
9	7:00pm Evening	Door Duty
5	7:00pm Evening	Speaker

Rostered On Duties

Date	Event	Duty
26/12/2016	7:00pm Evening	Door Duty
12/12/2016	7:00pm Evening	Speaker
05/12/2016	9:30am Traditional	Music Team
28/11/2016	9:30am Traditional	Piano
14/11/2016	7:00pm Evening	Door Duty
24/10/2016	9:30am Traditional	Music Team
03/10/2016	7:00pm Evening	Door Duty
26/09/2016	7:00pm Evening	Speaker
12/09/2016	9:30am Traditional	Piano
05/09/2016	9:30am Traditional	Music Team
22/08/2016	7:00pm Evening	Door Duty

## Roster Event

Roster Event  
9:30am Traditional

Select the Roster Event that you want to see Dashboard Information on.

## Individual Surnames

Enable Individual Surnames

Tick this option to let Pastoral Care display Individual Surnames where they exist when you have double clicked on a statistic to see the "people behind the statistic"

## Data Area

Shown below is the data area for the Roster Dashboard window. From here you can select a date range, select a date and a duty to see who is on. Further features allow you to double click on a persons name so you can see more detail about that person and duty.

You can select the Event that you want to see at the top of this area and you can also tick Enable Individual Surnames to show peoples names with their Individual Surnames if they have one on file.



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

**Roster Analysis** Roster Event: 9:30am Traditional  Enable Individual Surnames

Date: 04/01/2016 To: 26/12/2016

Date	Duties	Individuals Rostered On
04/07/2016	Door Duty	Chapman Adrien
27/06/2016	Overhead	Potter Wendy
20/06/2016	Music Team	Potter Karren
13/06/2016	Piano	
06/06/2016	Worship Leader	
30/05/2016	Offering	
23/05/2016	Speaker	
16/05/2016		
09/05/2016		
02/05/2016		
25/04/2016		
18/04/2016		
11/04/2016		
04/04/2016		
28/03/2016		
21/03/2016		
14/03/2016		
07/03/2016		
28/02/2016		
22/02/2016		
15/02/2016		
08/02/2016		
01/02/2016		
25/01/2016		
18/01/2016		
11/01/2016		
04/01/2016		

Teams Rostered On

Amount	Event	Duty
8	9:30am Traditional	Music Team
5	9:30am Traditional	Piano
9	7:00pm Evening	Door Duty
5	7:00pm Evening	Speaker

Date	Event	Duty
26/12/2016	7:00pm Evening	Door Duty
12/12/2016	7:00pm Evening	Speaker
05/12/2016	9:30am Traditional	Music Team
28/11/2016	9:30am Traditional	Piano
14/11/2016	7:00pm Evening	Door Duty
24/10/2016	9:30am Traditional	Music Team
03/10/2016	7:00pm Evening	Door Duty
26/09/2016	7:00pm Evening	Speaker
12/09/2016	9:30am Traditional	Piano
05/09/2016	9:30am Traditional	Music Team
22/08/2016	7:00pm Evening	Door Duty

Selecting a Date on the Roster Dashboard screen lets you see what Duties are on that date for the currently selected Roster Event.

When you select a Duty, the Individuals rostered on are displayed, and any teams are also shown on this screen. (Teams are not shown below)

Date	Duties	Individuals Rostered On
04/07/2016	Door Duty	Allwright Marion
27/06/2016	Overhead	Allwright Stephen
20/06/2016	Music Team	Angel Peter
13/06/2016	Piano	
06/06/2016	Worship Leader	
30/05/2016	Offering	
23/05/2016	Speaker	
16/05/2016		
09/05/2016		
02/05/2016		
25/04/2016		
18/04/2016		

The Rostered On Statistics shows for the selected

Rostered On Statistics		
	04/01/2016	To 26/12/2016
Amount	Event	Duty
11	9:30am Traditional	Door Duty
8	9:30am Traditional	Music Team
17	9:30am Traditional	Offering
6	11:00am Family	Car Park
7	11:00am Family	Piano
7	11:00am Family	Worship Leader

Rostered On Duties		
Date	Event	Duty
26/12/2016	9:30am Traditional	Door Duty
12/12/2016	9:30am Traditional	Offering
05/12/2016	11:00am Family	Worship Leader
21/11/2016	9:30am Traditional	Offering
21/11/2016	9:30am Traditional	Door Duty
21/11/2016	9:30am Traditional	Music Team
14/11/2016	11:00am Family	Piano
14/11/2016	11:00am Family	Car Park

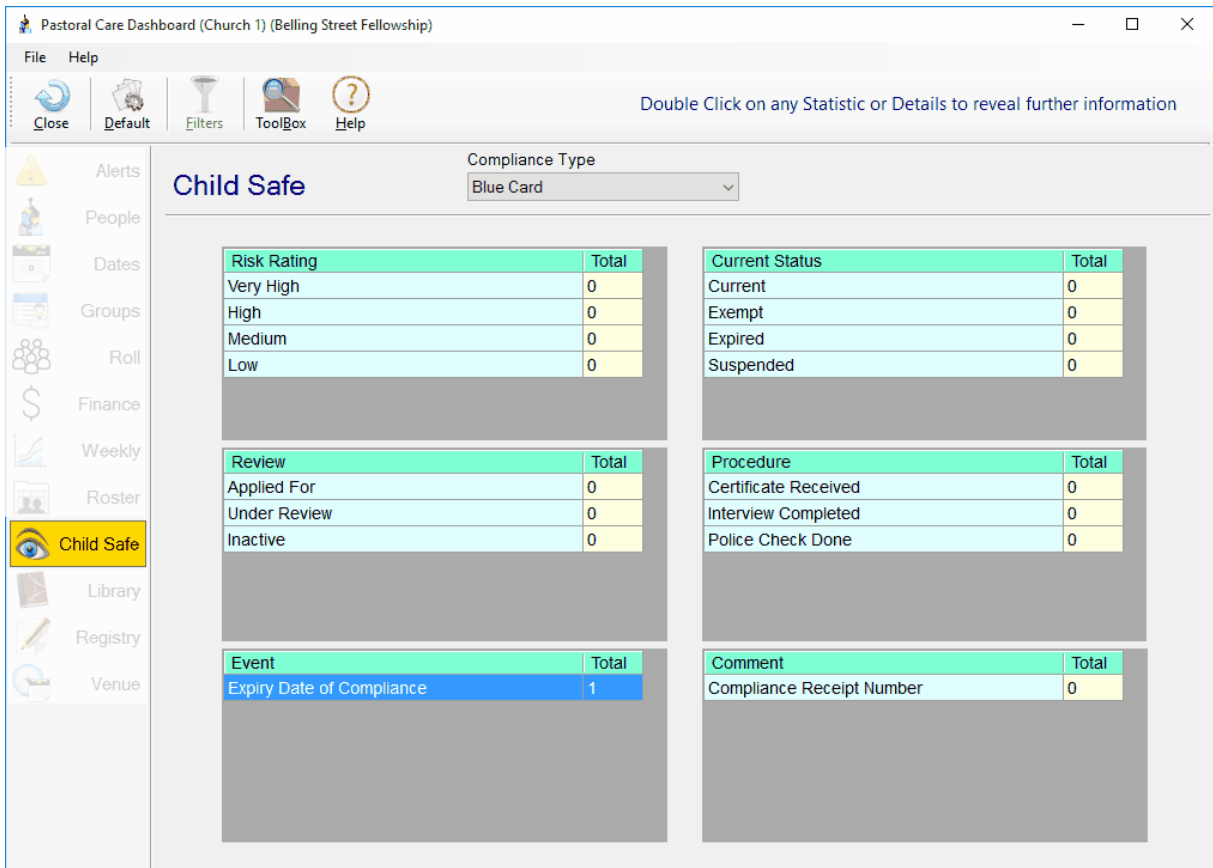
### Child Safe

The Child Safe Dashboard page shows Child Safe statistics at a glance. This will only be populated if you have been recording data in the [Child Safe](#) area of Pastoral Care.

As this is a sensitive area, you will need to have Security Access to Child Safe area, as well as know the independent Child Safe Password for access to the data.



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



**Compliance Type**

Compliance Type  
Blue Card

Select the Compliance Type that you want to see statistics on. In most churches, you may only have one compliance type setup.

**Data Area**

Shown below is the data area for the Child Save Dashboard page. This shows the number of items in each area. Double clicking on an item that has more than zero in its count, will show you more information on that statistic where available.

Risk Rating	Total	Current Status	Total
Very High	0	Current	0
High	0	Exempt	0
Medium	0	Expired	0
Low	0	Suspended	0

Review	Total	Procedure	Total
Applied For	0	Certificate Received	0
Under Review	0	Interview Completed	0
Inactive	0	Police Check Done	0

Event	Total	Comment	Total
Expiry Date of Compliance	1	Compliance Receipt Number	0

## Library

The Library Dashboard page shows Library statistics at a glance. This will only be populated if you have been recording data in the [Library Manager](#) area of Pastoral Care.

This page will show Assets on loan, as well as Assets that are overdue for return.

Library

Main Church

Over Due Loaned Assets...

ID	ISBN	Title	Borrowed	Due Back	Borrowed By

On Loan...

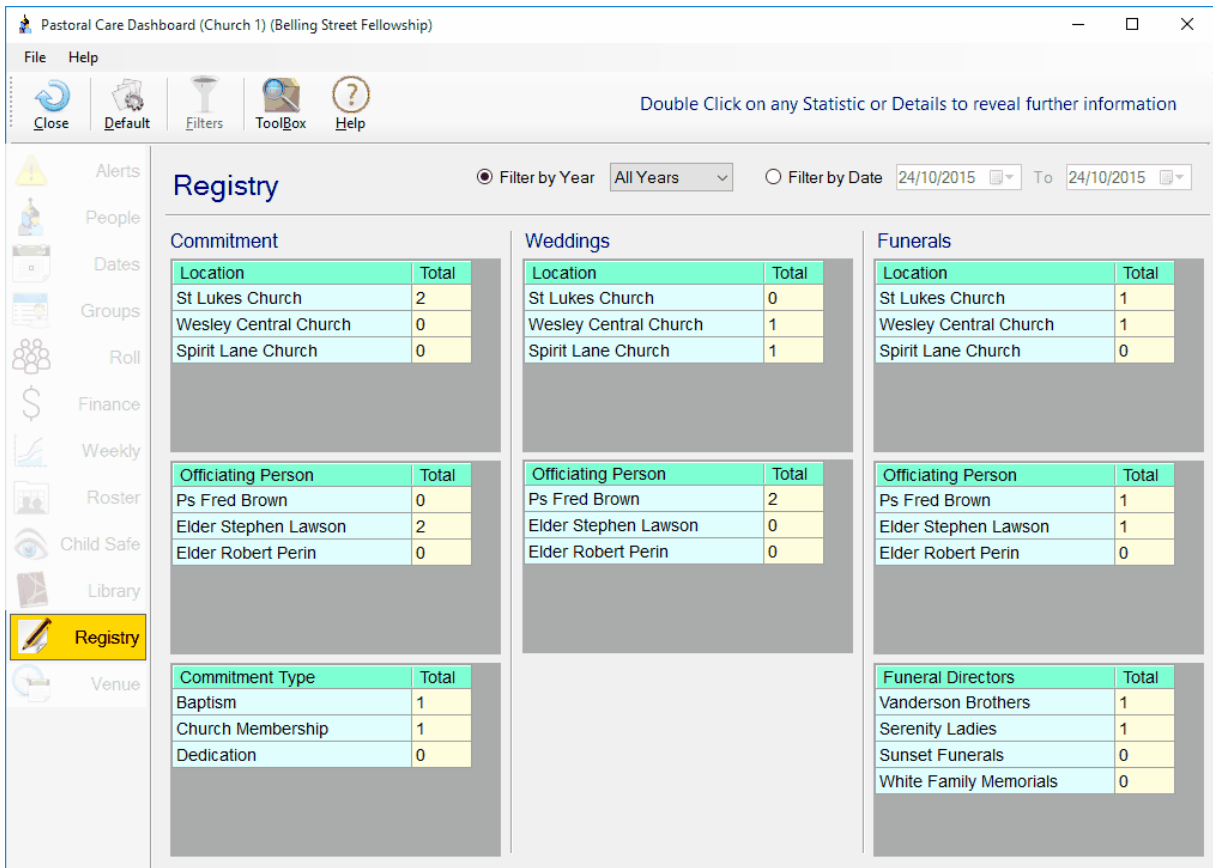
ID	ISBN	Title	Borrowed	Due Back	Borrowed By
6		A Simpe Christian	14/11/2016	28/11/2016	Stephen Allwright

## Registry

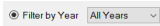
The Registry Dashboard page shows Registry statistics at a glance. This will only be populated if you have been recording data in the [Registry](#) area of Pastoral Care.



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

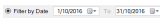


**Filter By Year**



By default, this screen is filtered by a year. You can select a year here to see Registry statistics for that selected (Calendar) year.

**Filter By Date**



By default, this screen is filtered by a year.

You can select Filter By Date you give you total control over the date range you want to see Registry Statistics for.

**Venue**

The Venue Dashboard page shows Venue statistics at a glance. This will only be populated if you have been recording data in the [Venue Booking](#) area of Pastoral Care.

Note, this screen only shows Venue Bookings, it does not show Booking Conflicts. These are shown on the [Alerts](#) Dashboard and the Main Menu alert area.

As with all Dashboard pages, you can double click on any item to see more information. Double clicking will load either the Edit Booking window, or a further statistical window showing more information.



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

Pastoral Care Dashboard (Church 1) (Belling Street Fellowship)

File Help

Close Default Filters ToolBox Help

Double Click on any Statistic or Details to reveal further information

Venue: Main Street Baptist Church Date: 24/10/2015 To 30/10/2015

Date	Start	Finish	Room	Event	Contact Person
24/10/2015 (Sat)	07:00 PM	10:00 PM	Church Worship Auditorium Kitchen	Youth Group	Alistair Dav
25/10/2015 (Sun)	09:30 AM	12:00 PM	Church Worship Auditorium Vestry Meeting Room Sunday School Room 1 Sunday School Room 2 Kitchen	Morning Church Service	Brian Smith
25/10/2015 (Sun)	07:00 PM	09:00 PM	Church Worship Auditorium Vestry Kitchen	Evening Church Service	Peter Black
27/10/2015 (Tue)	08:00 PM	10:00 PM	Sunday School Room 1	Toms Bible Study Group	Tom Clean
28/10/2015 (Wed)	07:00 PM	10:00 PM	Meeting Room	Leadership Meeting	Don Anderson
30/10/2015 (Fri)	10:00 AM	01:00 PM	Meeting Room Kitchen	Ladies Bible Study	Grace King

Room	Total
Church Worship Auditorium	3
Vestry	2
Meeting Room	3
Sunday School Room 1	2
Sunday School Room 2	1
Kitchen	4

Global Booking Statistic	Total
All Fixed Bookings	1
All Pattern 1 Bookings	8
All Pattern 2 Bookings	2
All Expired Fixed Bookings	1
All Expired Pattern 1 Bookings	1

### Select Venue

Venue  
Main Street Baptist Church

Select the Venue that you want to see Dashboard data for.

### Venue Date Range

Date  
24/10/2015 To 30/10/2015

Select the Date Range that you want to see Venue Dashboard data for. The default date range shown is the Current date + 7 days (7 Days including the current date)

### Venue Booking Data

This list shows the upcoming Venue / Room bookings for the selected Venue and Date Range.

Double clicking on a booking will bring up the Edit Booking window, allowing you to edit that booking or see more details.



Date	Start	Finish	Room	Event	Contact Pe
24/10/2015 (Sat)	07:00 PM	10:00 PM	Church Worship Auditorium Kitchen	Youth Group	Alister Dav
25/10/2015 (Sun)	09:30 AM	12:00 PM	Church Worship Auditorium Vestry Meeting Room Sunday School Room 1 Sunday School Room 2 Kitchen	Morning Church Service	Brian Smith
25/10/2015 (Sun)	07:00 PM	09:00 PM	Church Worship Auditorium Vestry Kitchen	Evening Church Service	Peter Black
27/10/2015 (Tue)	08:00 PM	10:00 PM	Sunday School Room 1	Toms Bible Study Group	Tom Clean
28/10/2015 (Wed)	07:00 PM	10:00 PM	Meeting Room	Leadership Meeting	Don Ander
30/10/2015 (Fri)	10:00 AM	01:00 PM	Meeting Room Kitchen	Ladies Bible Study	Grace King

### Room Data

The Room Data panel shows the number of bookings for each room in the Selected Venue for the Selected Date Range.

Double clicking on a room will show the number of bookings in more detail.

Room	Total
Church Worship Auditorium	3
Vestry	2
Meeting Room	3
Sunday School Room 1	2
Sunday School Room 2	1
Kitchen	4

### Global Booking Statistic

This statistic shows the number of booking by Date Type. Such as a Pattern Booking, a Fixed Date booking etc.

Global Booking Statistic	Total
All Fixed Bookings	1
All Pattern 1 Bookings	8
All Pattern 2 Bookings	2
All Expired Fixed Bookings	1
All Expired Pattern 1 Bookings	1

### People Behind The Statistic

Depending on the Dashboard Area you were in when you came to this window, the data shown will be different. However the functionality of this window is the same.

This window shows the names of people who make up a statistic that is displayed on the dashboard. For example, if you double click on Single Adults, you will be shown the following window with all the single adults names listed.



People behind the Statistic



Single Adults



Blackeby Dot  
Flemming Lyndon  
Flemming Merideth  
Flemming Alister  
Flemming Penny  
Flemming Johnathon  
Gordan Wendy  
Gordan James  
Graham Janis  
Graham Joel  
Gray Peter  
Iles Ben  
Iles Leanne  
Kean Nathan  
Kean Jannet  
Leah Nathan  
Lynch Christopher  
Lynch Adam  
Lynch Mandy  
Morton Paula  
Morton Christine  
Potter Nathan  
Potter Karren  
Read Anna  
Read Marcus  
Read Andrew  
Read Sophie  
Taylor Bradd

Total = 28  
24.6%

Dot  
13 Griff St  
Keilor Heights 3191

Email  SMS 

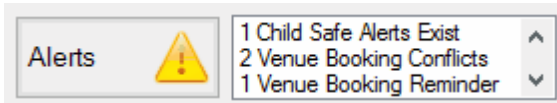
Map  Visitation 

Report  Close 

For any selected person you can :

- Create an Email or an SMS
- View their Map Information
- Create a Visitation Request
- Generate a Report on all people in the list

## Alerts



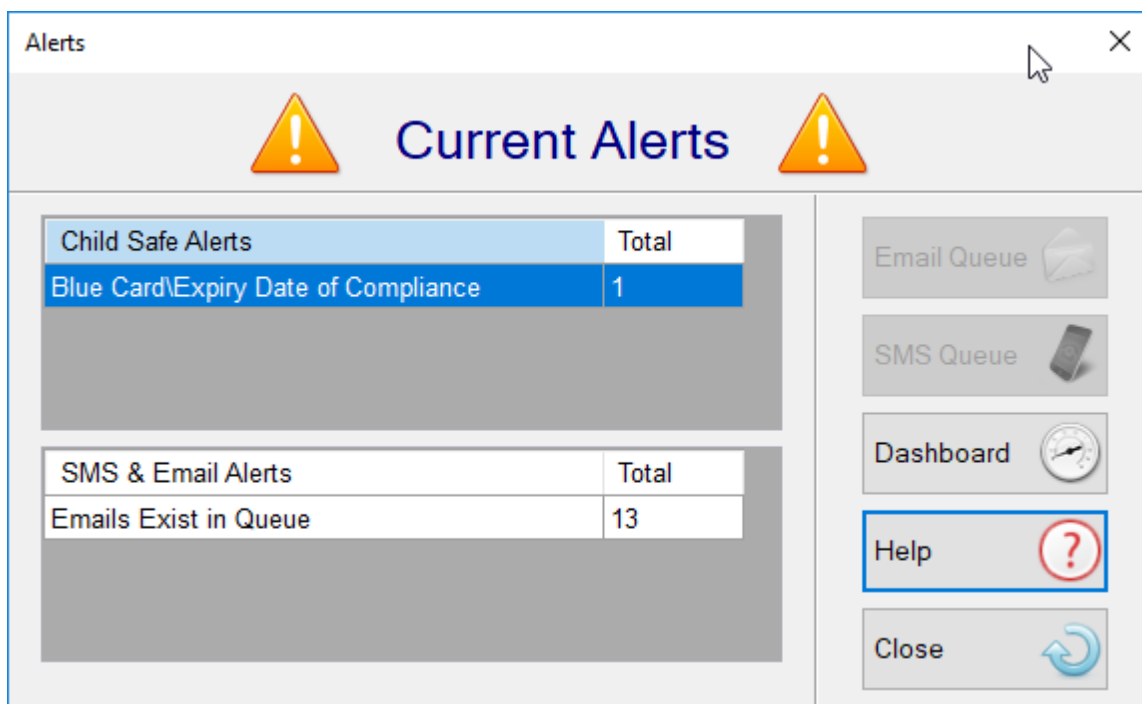
In the lower left corner of the Main Menu of Pastoral Care you will see the Alerts section. If there are any items shown in this list, you can double click on them to take you to the relevant area to action that alert. In the example above, you can see that we have 1 Child Safe alert, 2 Venue Booking Conflicts and 1 Venue Booking Reminder.

If you see the vertical scroll bar as shown in the above picture, there are more alerts to be seen by scrolling the list down.

### Alerts Pop Up Screen

When Pastoral Care starts up, if there are any alerts, the following window is displayed. You can also show this window by clicking on the Alerts icon shown above that appears on the main menu.

**Double Click** on any item in any of the alert areas to be taken to each area of interest and see more detailed information.



# **Chapter**

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**7**

***Church Tab***

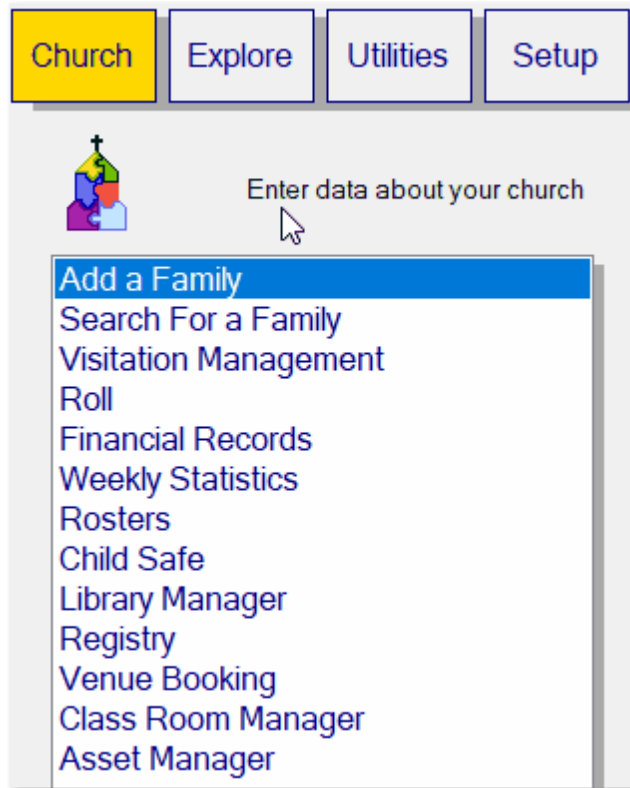
## Church Tab

### 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.



### 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 (Pre Fill)

Surname  Family Condition

New Name Entry  
    
 Adult

Child

Individual Information  
 Individual Condition   
 Gender   
 Occupation  ...  
 Title   
 Preferred Given Name   
 Other Surname   
 Birth Date   
 Mobile Phone   
 Personal Email

Family Information

Residential Address  
 Street   
  
 Suburb  ...  
 Postcode  Map  Ref   
 State   
 Country

Home Phone   
 Family Mobile   
 Family Email Address

## 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.

New Name Entry  
    
 Adult

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

New Name Entry

Adult

Child

In the example (left) 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.

The screenshot shows a form titled "Residential Address" with the following fields and controls:

- Street: Two text input fields.
- Suburb: A dropdown menu with a "..." build button to its right.
- Postcode: A text input field.
- Map: A small button next to the Postcode field.
- Ref: A text input field.
- State: A dropdown menu.
- Country: A dropdown menu.
- Home Phone: A text input field.
- Family Mobile: A text input field.
- Family Email Address: A text input field.
- Buttons: "Help" (with a question mark icon), "Cancel" (with a red X icon), and "Add" (with a green plus icon).

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

## 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 [FamilyFile 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.

### Add New Family Window

Add New Family (Pre Fill)

Surname  Family Condition

---

**New Name Entry**

Adult

**Child**

**Individual Information**

Individual Condition

Gender

Occupation

Title

Preferred Given Name

Other Surname

Birth Date

Mobile Phone

Personal Email

---

**Family Information**

**Residential Address**

Street

Suburb

Postcode  Map  Ref

State

Country

Home Phone

Family Mobile

Family Email Address

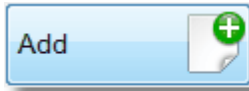
### Steps to enter a family into the Add New Family Window

- 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 FamilyFile Editor, ready

for more information to be saved if available.

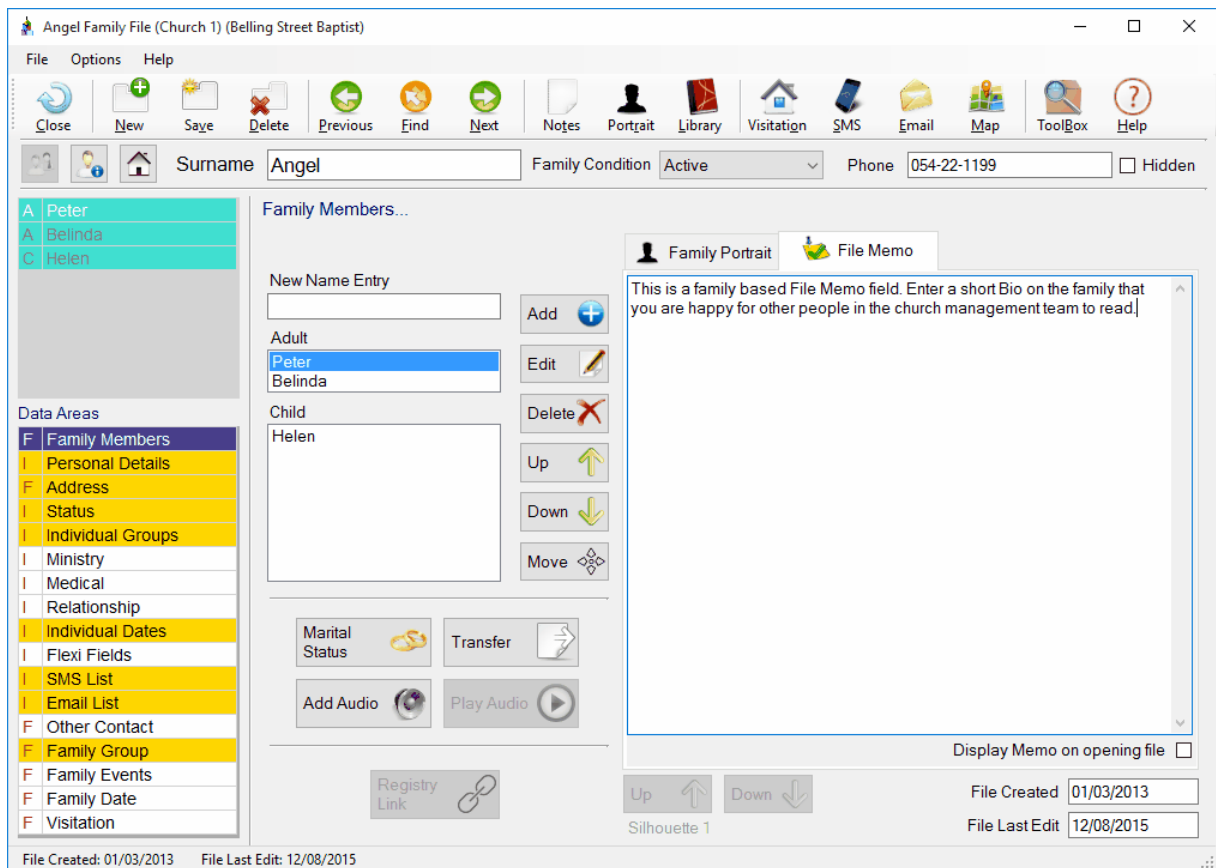


See also [Family File Full Screen](#)

## 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  
See also Navigation Control




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

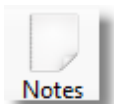


Access some quick features
  
- Access the Family Notes editor

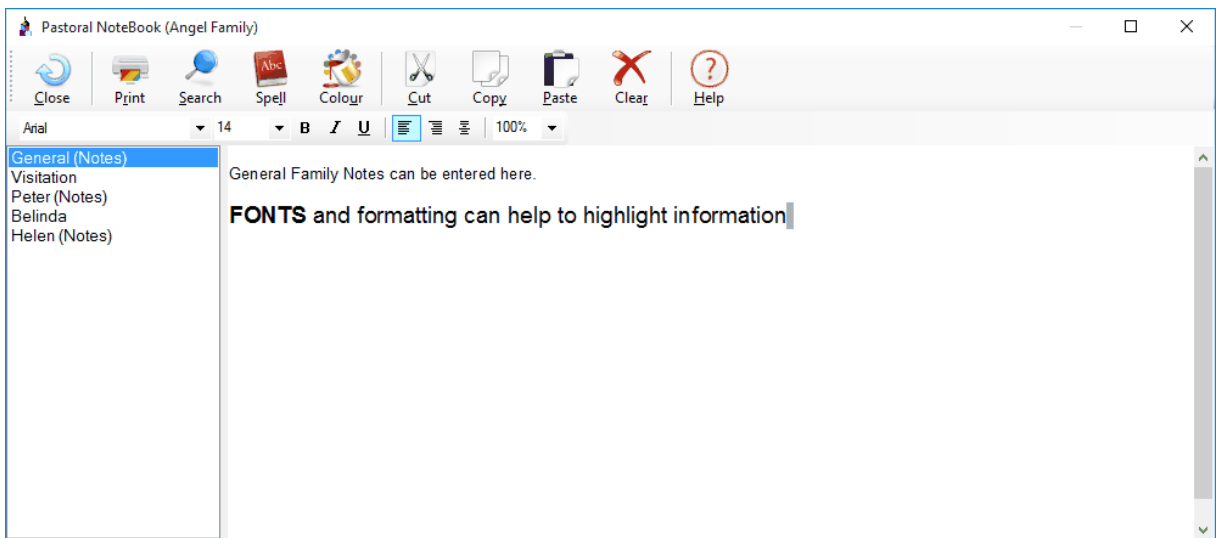


View this context sensitive help system

**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 Management](#) 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.

OR Use the new Web Cam feature to add photos live into Pastoral Care while you have the family file open.

(See [Via Webcam](#))

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, or press the Web Cam button to take a new photo on the spot.

6. Select the Position to add the photo to (Family portrait 1,2 or 3, or an Individual Portrait)

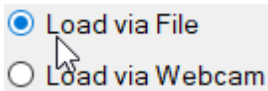
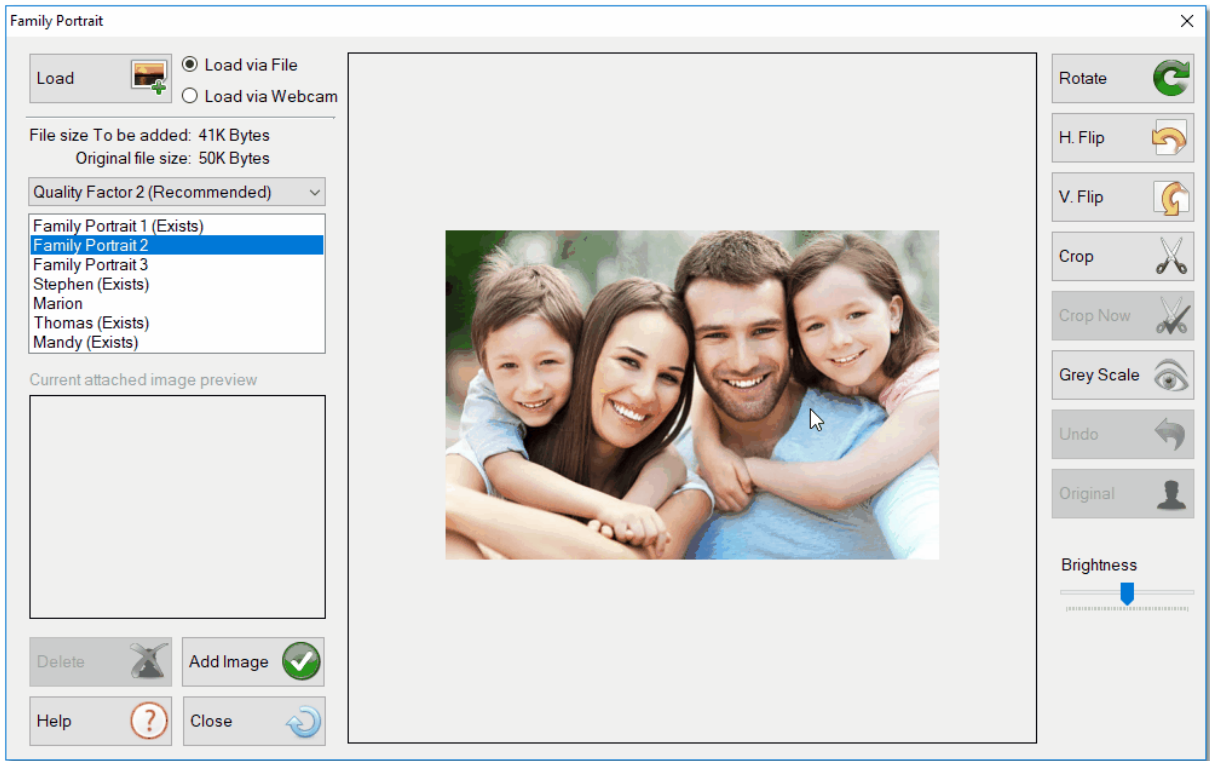
7. Press Add Image

## Family Portrait Screen



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

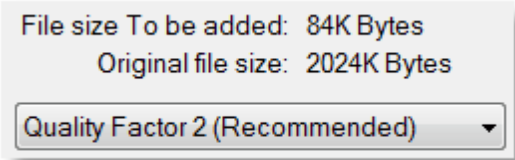
See Also [Portrait](#) for steps on how to add photos to a family file.



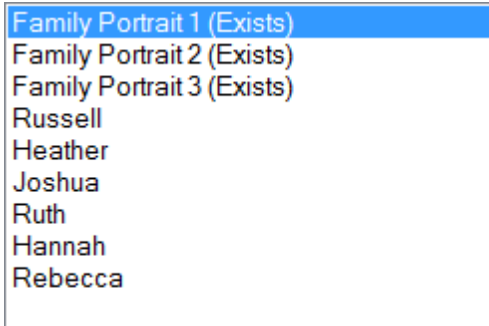
Load an image from either a file or from a Webcam to be added to the family as a portrait



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 Factory 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.

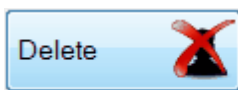


Select the location to ADD a photo to. The positions available are Family Portrait's 1,2 and 3, as well as one for each individual.

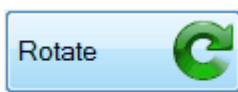
We recommend that you settle on a standard for each of the Family Portrait positions. For example the Parents for Portrait 1, Kids only in Portrait 2, and the whole family in portrait 3.



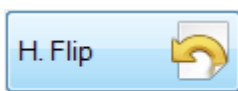
This shows a preview of the selected Family / Individual Selected Portrait.



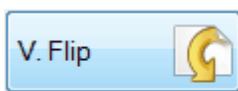
Delete a picture attached to the selected Family Portrait or Individual position.



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

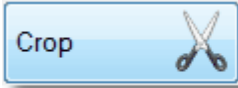


Flip the picture (mirror) horizontally.

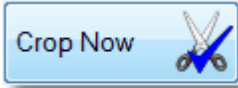


Flip the picture (mirror) vertically.

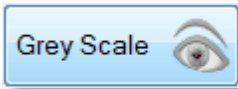




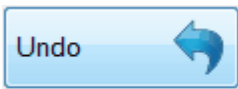
Select an area of the picture to crop.



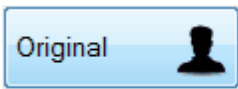
After marking an area with Crop, press the Crop Now button to complete the crop.



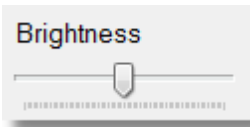
Convert the picture to grey tones only.



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.

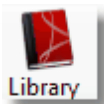


Use this to reload the original picture and discard all of your changes.



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



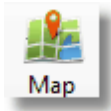
The SMS button on the FamilyFile Toolbar takes you to a common SMS area, but it also pre-loads the mobile phone information from the family file you were in at the time. See [SMS](#) for more information on this feature.

### Email



The Email button on the FamilyFile 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.

### Navigation Control



In the Family Editor, the function of the Next and Previous buttons can be altered. Select OPTIONS - SETUP PREVIOUS AND NEXT from the menu, and the following control screen is shown.

The default is to navigate through all families. Select the option you want to use

Previous & Next Options

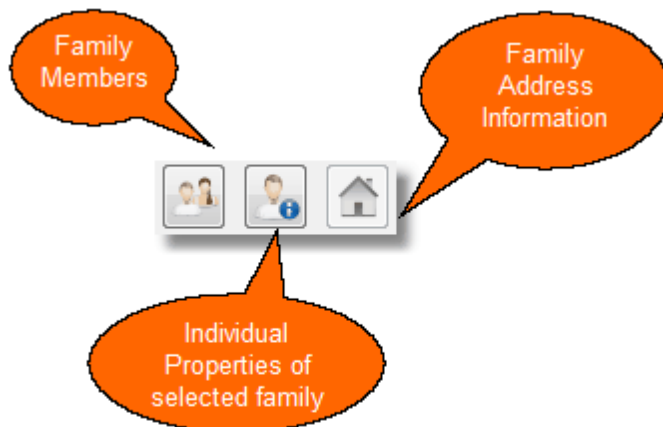
This setting is saved only for this workstation, if on a network each workstation can set their own preference

- Navigate through All Family files
- Navigate only Active and Privacy Request Family files
- Navigate only Active Family files
- Navigate only Privacy Request Family files
- Navigate only Prospect Family files
- Navigate only Archived Family files

[Help](#)  [Close](#) 

### 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.



## 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.

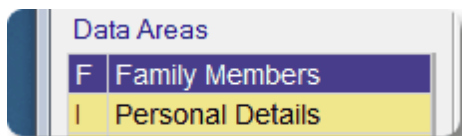
Note the highlight colour. This colour indicates that information exists in those areas. You can change the highlight colour in Setup - Global - General

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.

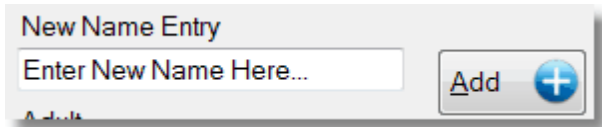
This is accessed by selecting Family Members from the [Family File Data Areas](#) menu.



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

File Created	01/03/2013
File Last Edit	17/08/2015

**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**



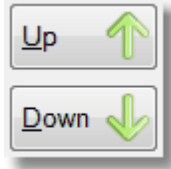
Press this to edit the currently selected person's name.

**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

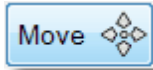


Use these buttons to move people around the family file into different positions.

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!

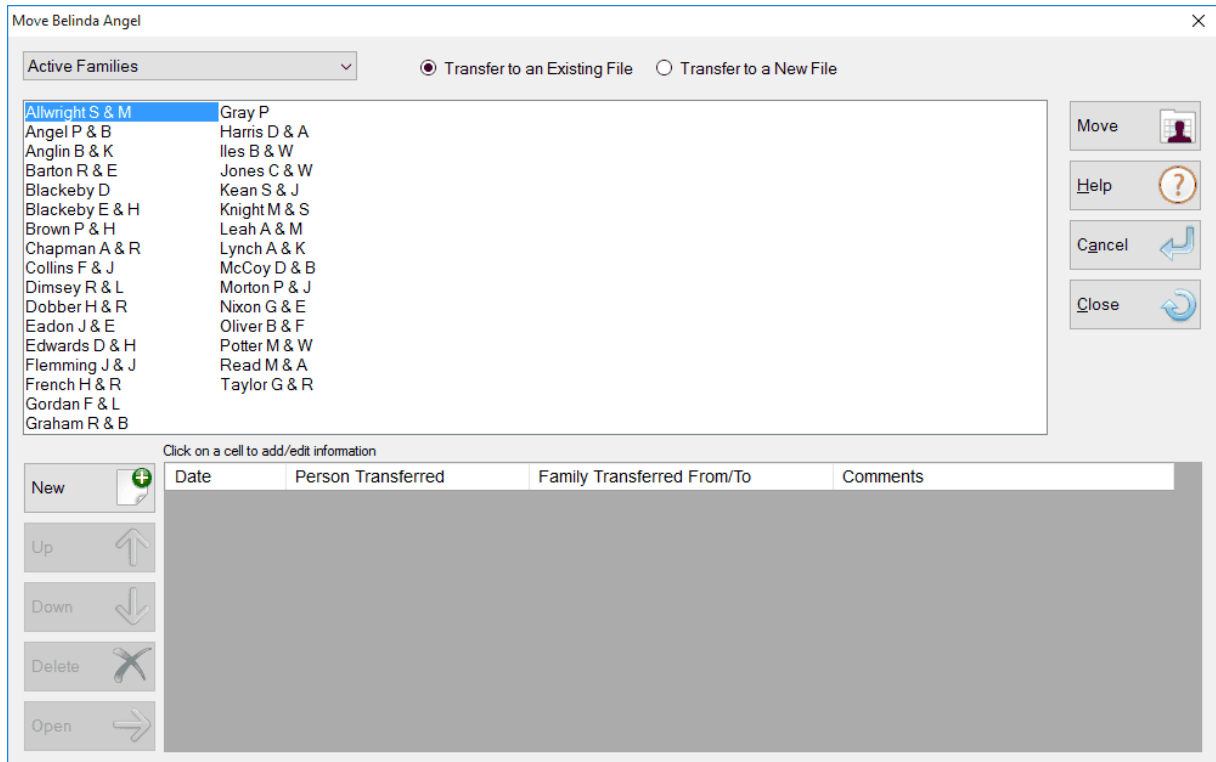
Here are few ways to use Move...

## 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, Belinda Angel) . You can choose to transfer Belinda 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

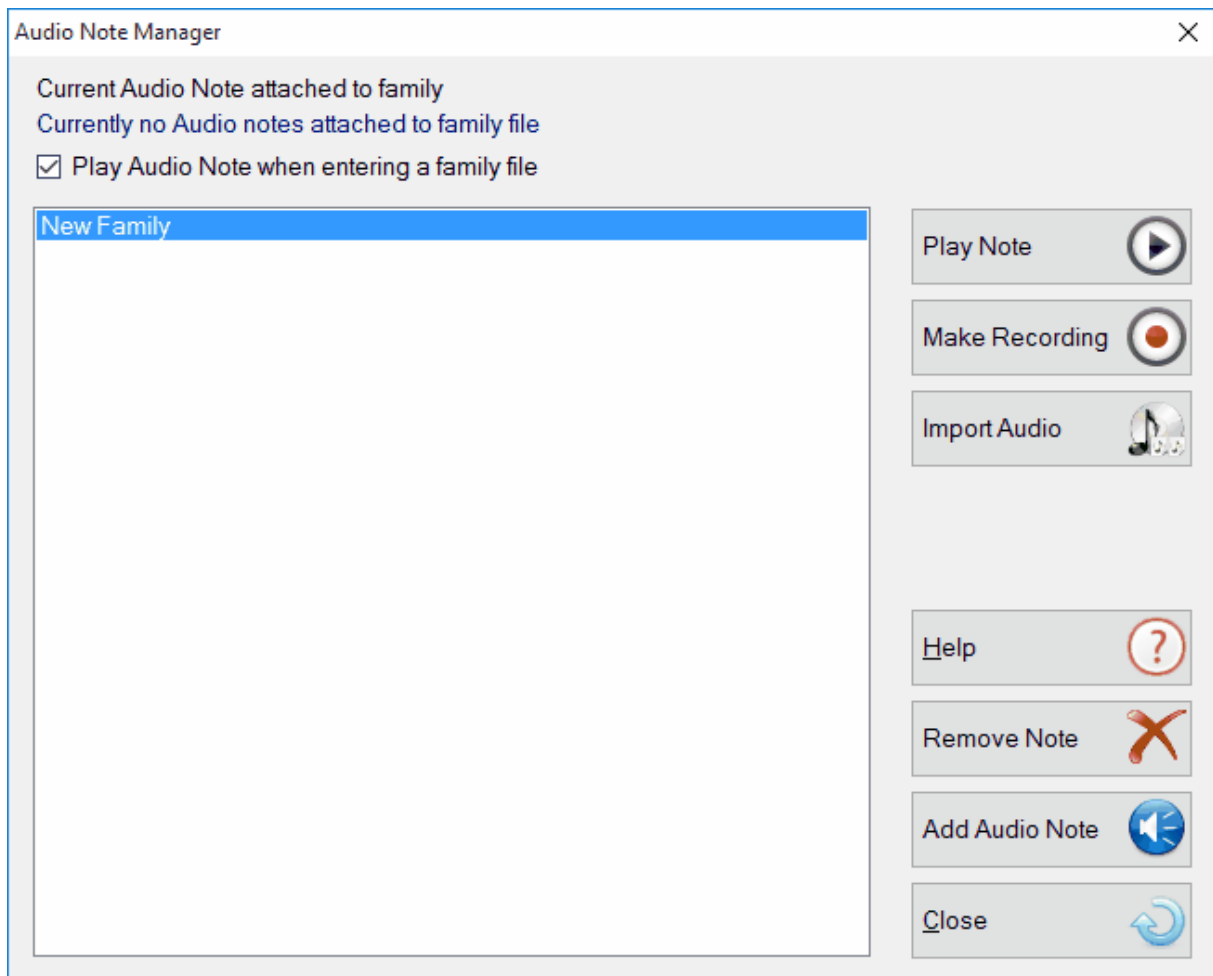
Pastoral Care allows you to add an Audio Prompt to a family file that is played each time the family file is loaded. This allows you to put information right into the foreground. You can press the Record button to record your own, or Import some notes from another location, such as earlier Pastoral Care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



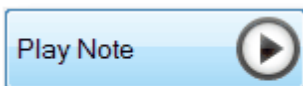
### Attached Note

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

### Available Audio Notes

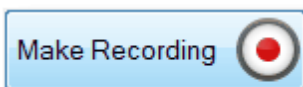
This is the list of available audio notes available to select for a family.

### Play Note



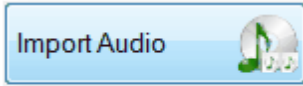
Press the Play Note button to play/ preview the selected audio note.

### Make Recording

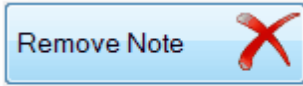


Press the Make Recording button to create your own audio file.

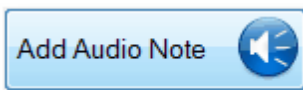


**Import Audio**

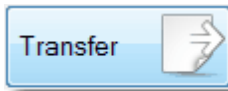
Press this button to import an audio file as an audio note.

**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**

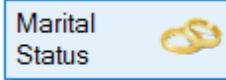
Transfer an entire family to another church database. This is useful if you are using multiple databases to manage another parish etc, and a family is moving to that parish. Only main contact and personal contact information is transferred.

**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	

## Marital Status



Pastoral Care has always determined the Marital Status of a family in the family file by analysis and logic. This is not always 100% accurate.

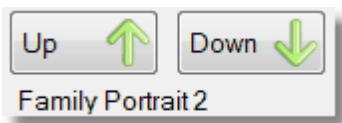
Using the Marital Status window below, which is found by pressing Marital Status in the family editor while on the Family properties screen, you can manually select the status of each adult in the family.

Marital Status ×

Families can be filtered and statistics given based on who is entered within the family file. By default the program does an analysis to determine the marital status of a family. This auto analysis can be overridden here by choosing a fixed marital status of the family.

<p><b>Primary Adult within family</b></p> <p><b>Stephen</b></p> <p><input checked="" type="radio"/> Auto Analysis</p> <p><input type="radio"/> Single Adult</p> <p><input type="radio"/> Single Parent</p> <p><input type="radio"/> Couple, no children</p> <p><input type="radio"/> Couple, with children</p> <p><input type="radio"/> Widower, no children</p> <p><input type="radio"/> Widower, with children</p> <p><input type="radio"/> Adults with deceased children</p> <p><input type="radio"/> (Single Adult) (Widower, no children)</p> <p><input type="radio"/> (Single Adult) (Adults with deceased children)</p> <p><input type="radio"/> (Single Adult) (Widower, no children) (Adult with deceased children)</p> <p><input type="radio"/> (Single Parent) (Widower, with children)</p> <p><input type="radio"/> (Single Parent) (Adults with deceased children)</p> <p><input type="radio"/> (Single Parent) (Widower, with children) (Adult with deceased children)</p> <p><input type="radio"/> (Couple, no children) (Adult with deceased children)</p> <p><input type="radio"/> (Couple, with children) (Adult with deceased children)</p>	<p><b>Secondary Adult within family</b></p> <p><b>Marion</b></p> <p><input checked="" type="radio"/> Auto Analysis</p> <p><input type="radio"/> Single Adult</p> <p><input type="radio"/> Single Parent</p> <p><input type="radio"/> Couple, no children</p> <p><input type="radio"/> Couple, with children</p> <p><input type="radio"/> Widower, no children</p> <p><input type="radio"/> Widower, with children</p> <p><input type="radio"/> Adults with deceased children</p> <p><input type="radio"/> (Single Adult) (Widower, no children)</p> <p><input type="radio"/> (Single Adult) (Adults with deceased children)</p> <p><input type="radio"/> (Single Adult) (Widower, no children) (Adult with deceased children)</p> <p><input type="radio"/> (Single Parent) (Widower, with children)</p> <p><input type="radio"/> (Single Parent) (Adults with deceased children)</p> <p><input type="radio"/> (Single Parent) (Widower, with children) (Adult with deceased children)</p> <p><input type="radio"/> (Couple, no children) (Adult with deceased children)</p> <p><input type="radio"/> (Couple, with children) (Adult with deceased children)</p>
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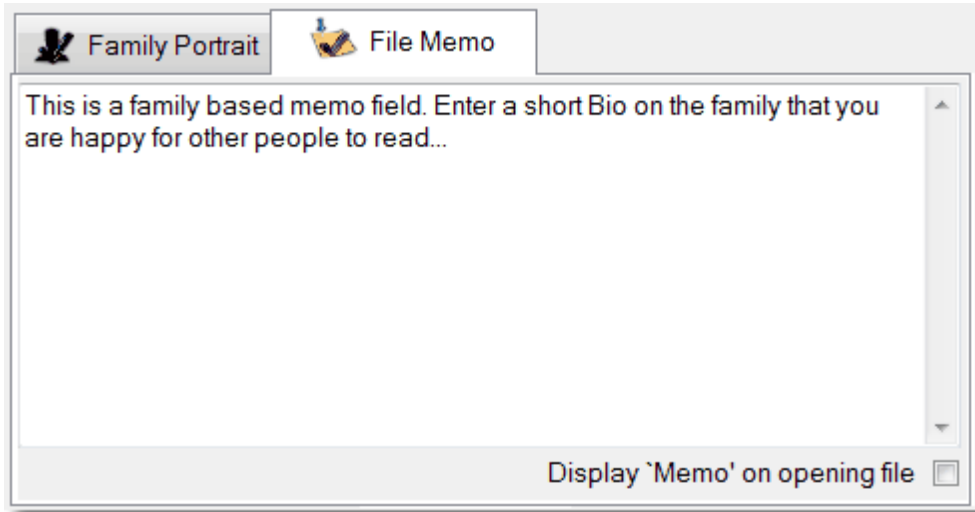
## Portrait Order



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.

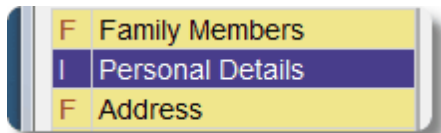


The screenshot shows a software window with two tabs: "Family Portrait" and "File Memo". The "File Memo" tab is active, displaying a text area with the placeholder text: "This is a family based memo field. Enter a short Bio on the family that you are happy for other people to read...". Below the text area is a checkbox labeled "Display 'Memo' on opening file".

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

Financial P.I.N.

## 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 <a href="#">Individual Condition</a>
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

<b>Preferred Given Name</b>	If this is filled in, the preferred given name will be used on all reports and communications with that person.
<b>Middle Name</b>	A person's Middle name.
<b>Other Surname</b>	If another surname is entered here, then if selected during the reporting process, other surnames will be used instead of the family surname.
<b>Birth Date</b>	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.
<b>School Year</b>	Enter the year of school a person is currently in. See also <a href="#">School Year Manager</a> for information on how to index all school years up 1 at the start of a new school year.
<b>Mobile Phone</b>	Enter a person's Personal Mobile Phone number. This will be by default the first mobile phone number used when sending an SMS message.
<b>Personal Email</b>	Enter a person's Personal Email Address. This will be by default the first email address used for email communication.
<b>Business Phone</b>	Enter a phone number for business contact
<b>Business Fax</b>	Enter a phone number for a business Fax Line
<b>Business Email</b>	Enter a person's Business Email Address
<b>Financial PIN</b>	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.

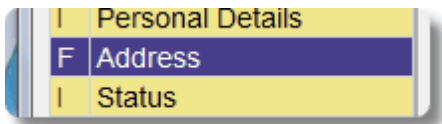
## Address

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 [FamilyFile 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"/>	
	<input type="text"/>			<input type="text"/>	
Suburb	<input type="text" value="Sunbury"/> ...		Suburb	<input type="text"/> ...	
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"/>	

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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

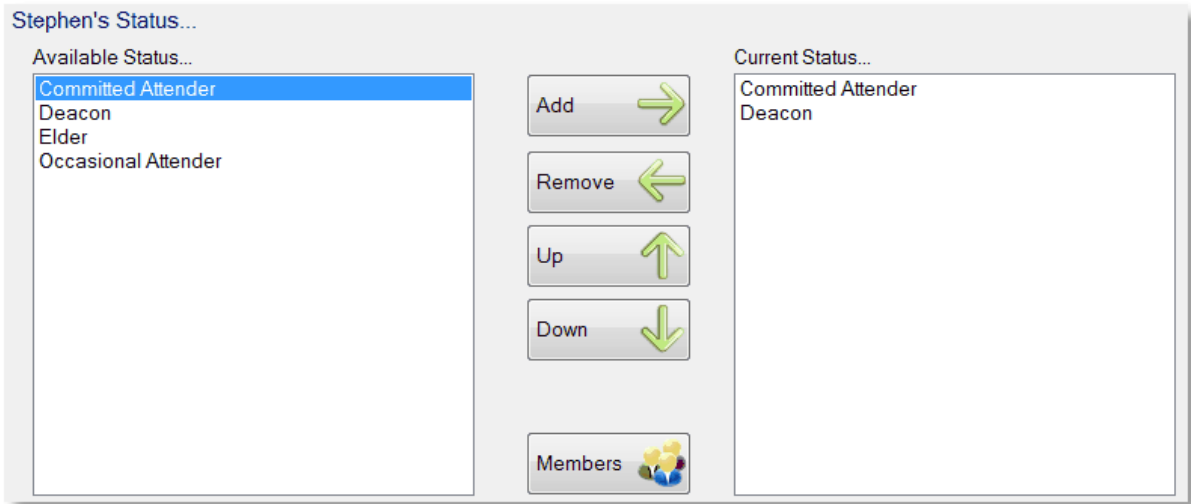


Press either of the Build Buttons to allow you to add to the list of suburb data stored in Pastoral Care

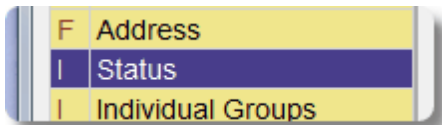
## Status

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

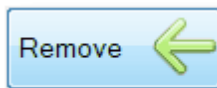
See also [Setup - FamilyFile](#) for more information on defining family file attributes.



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



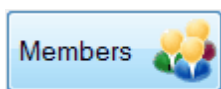
Select a Status from the list of available status's, and press Add to add that status to the currently selected person. You can also just double click on an item in the left hand list to add that to the Current Status list for the selected person.



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.



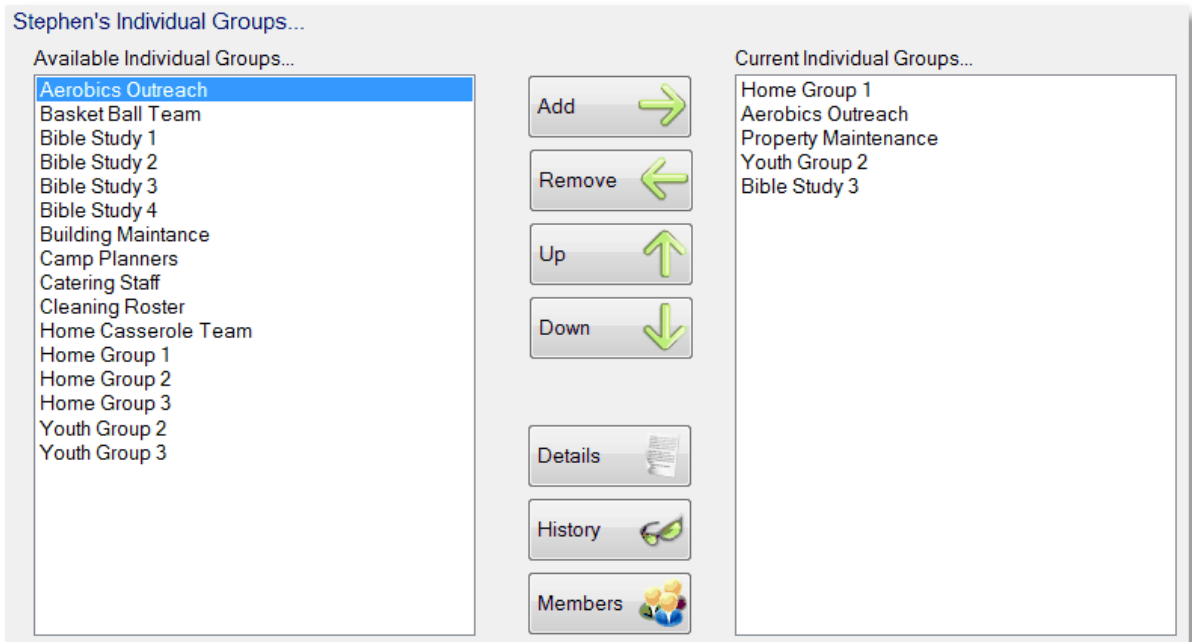
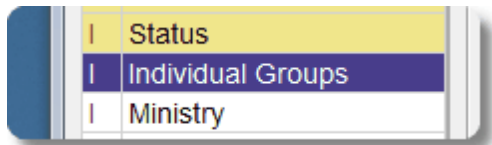
Press the Members button to see a list of all current members of the selected status.

## Individual Groups

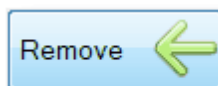
The Individual Groups area in the Family Editor is where you assign participation in a group for individual family members.

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.

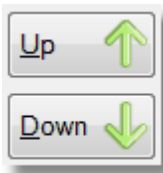


Select an Individual Group from the list of available groups, and press Add to add that group to the currently selected person. You can also just double click on an item in the left hand list to add that to the Current Group list for the selected person.

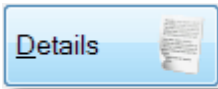


Press the Remove button to remove a selected Group from a person. You can also double click on an item in the right hand panel to remove the selected group from the currently selected person.





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.

Group Details
✕

---

### Property Maintenance

Leader	<input type="text" value="John Graham"/>	Phone	<input type="text" value="0444-123-123"/>
Assistant	<input type="text"/>	Phone	<input type="text"/>
Host	<input type="text" value="John and Greta Graham"/>	Phone	<input type="text"/>
Day/Date	<input type="text" value="Thur Evening"/>	Time	<input type="text" value="7pm"/>
Venue / Address	<input type="text" value="3 The Willows Goonadata"/>		
Frequency	<input type="text" value="1st and 3rd Thursday"/>		
Comments	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>		

Help ?
Report 
Cancel 
Close

## Group Report

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

Report Viewer
— □ ✕

Close Cancel Print Save Load Export Help ?

100% 1/1

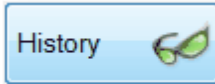
### Property Maintenance

---

Property Maintenance

Leader: John Graham	Phone: 0444-123-123
Assistant Leader:	Phone:
Host: John and Greta Graham	Phone:
Venue/Address 3 The Willows Goonadata	
Day/Date Thur Evening	Time: 7pm
Frequency 1st and 3rd Thursday	
Comments	
<b>People Attending</b> Stephen Allwright, Marion Allwright, Helen Angel, Brent Anglin, Kerryn Anglin, Adrien Chapman, Hannah Chapman, Fred Collins, Sarah Dimsey, Mandy Dimsey, Julie Flemming, Merideth Flemming, Alistair Flemming, Harry French, Rose French, James Gordan, Darryn Harris, Annita Harris, Wendy Jones, Ryan Jones, Steve Kean, Mike Knight, Rachael Knight, Adam Leah, Allan Lynch, Peter Morton, Greg Nixon, Esther Nixon, Fran Oliver, Wendy Potter, Alison Read, Andrew Read, Sophie Read,	

## 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

Property Maintenance

Name	Date In	Date Out
Allwright Stephen	01/01/2013	
Allwright Marion	01/01/2013	
Angel Helen	01/01/2013	
Anglin Brent	01/01/2013	
Anglin Kerryn	01/01/2013	
Blackeby Ernie	01/01/2013	
Chapman Adrien	01/01/2013	
Chapman Hannah	01/01/2013	
Collins Fred	01/01/2013	
Dimsey Sarah	01/01/2013	
Dimsey Mandy	01/01/2013	
Dimsey David	01/01/2013	
Flemming Julie	01/01/2013	
Flemming Merideth	01/01/2013	
Flemming Alister	01/01/2013	

To edit a date click on the date cell

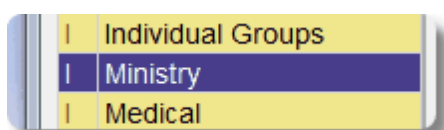
Help ? Close

## 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,

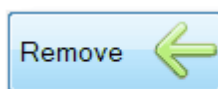
### Removing a Ministry from a person.

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.

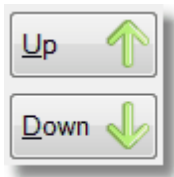
The screenshot shows a software interface for managing ministries for a person named Russell. On the left, under 'Available Ministry...', there is a list of ministries: Praise Leader (highlighted), Healing Gift, Prayer Team, Communion Leader, Youth Leader, Sunday School Teacher, Prophecy, Door Team, Follow Up Ministry, Home Support, Preaching, Overhead Operator, Street Outreach Team, and Tape Ministry. In the center, there are four buttons: 'Add' with a right-pointing arrow, 'Remove' with a left-pointing arrow, 'Up' with an up-pointing arrow, and 'Down' with a down-pointing arrow. At the bottom center is a 'Members' button with a group of people icon. On the right, there are two boxes: 'Current Active Ministry...' containing 'Praise Leader' and 'Current Potential Ministry...' containing 'Preaching'. Below these boxes are two radio buttons: 'Add as Active Ministry' (selected) and 'Add as Potential Ministry'.



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.



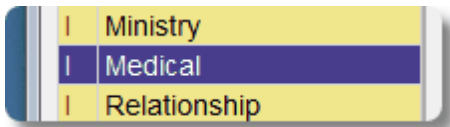
Use the Up and Down buttons to change the list order for the selected Ministries..

## 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.

Russell's Medical...

Available Medical Groups...

Asthma  
Peanut Allergy

Add →

Remove ←

Up ↑


Down ↓

Current Medical Groups...

Asthma

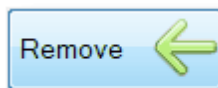
Medical Notes...

Use Ventolin Hand Spray, Russell knows how to use ok. 3 Puffs on onset it ok.

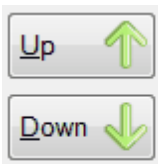
Members 



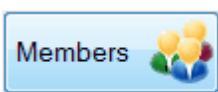
Select a Medical Condition and press the Add button to add that Medical Condition to the currently selected person.



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.

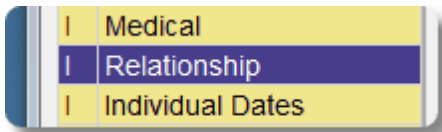
## Relationship

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.

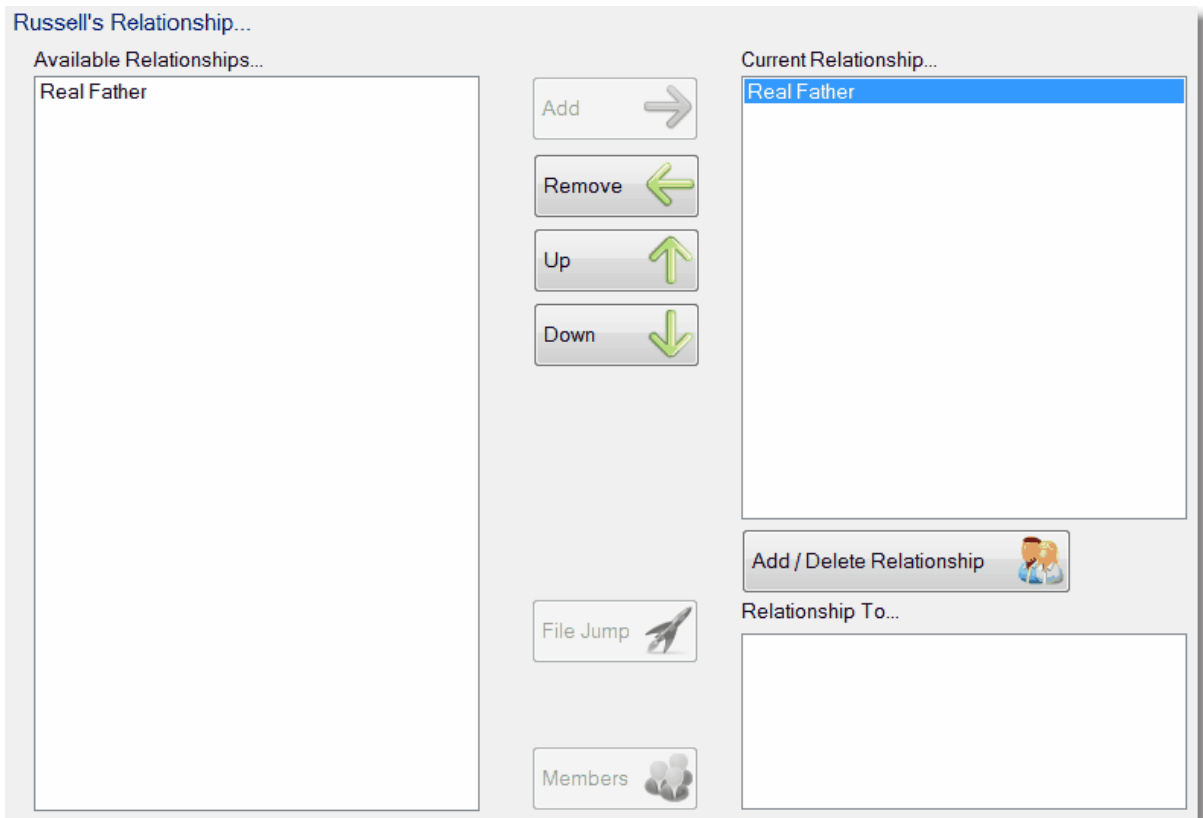
The screen below shows that for Russell, we have added Real Father to his relationship data area. The next step would be to press the [Add Relationship Link](#), and browse to Russell's Real Father to assign that relationship. This is ideal for recording separated families, or even Guardians and Grandparents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



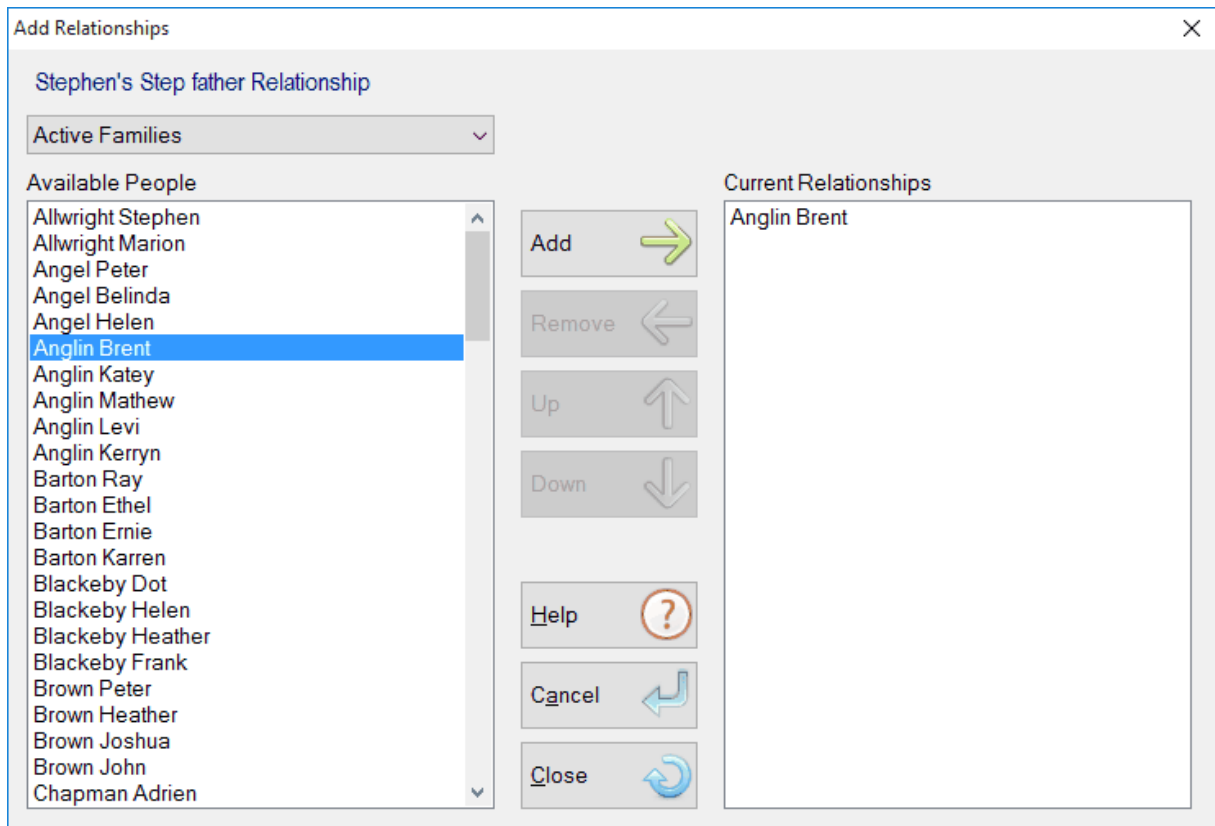
Click on each part of the Relationship window below to learn more.



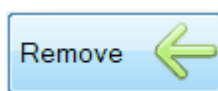
### Add Relationship Link

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.

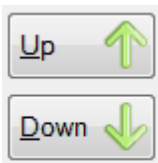
See also [Setup - Family File](#) for more information on defining family file attributes.



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

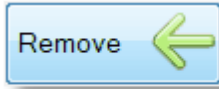
This is the list of Available relationships that you have setup in the [Setup - Family File](#) area of Pastoral Care.



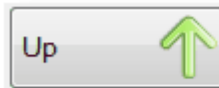
### Control Buttons



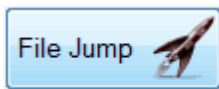
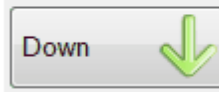
Press Add to add the selected relationship to the current individual in the family file.



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



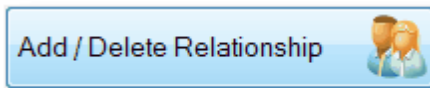
Use the Up and Down arrow control buttons to sort the list of relationships.



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



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



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

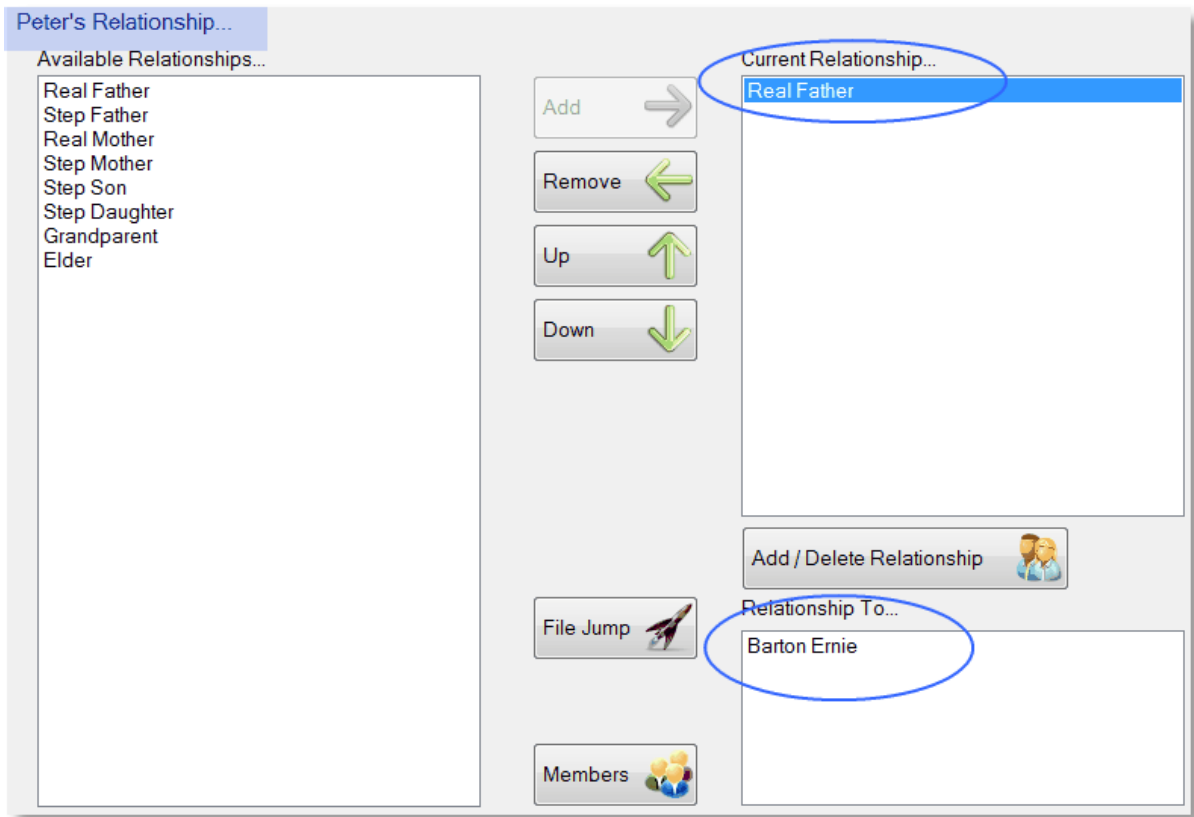
### Current Relationship

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

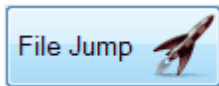
### Relationship To

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



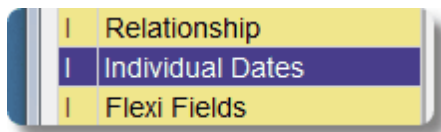
Press Members to see a list of current members of the selected relationship group.

### 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

Add   
Members

Current Flexi Fields... Click on the 'Flexi Description' cell for edit mode

Flexi Field	Tag	Flexi Description
Elder	<input type="checkbox"/>	John Graham
Blood	<input type="checkbox"/>	A-

Predefined Fields

John Graham
Kerry Peters
Lance Feldman

Delete

Add

### 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.

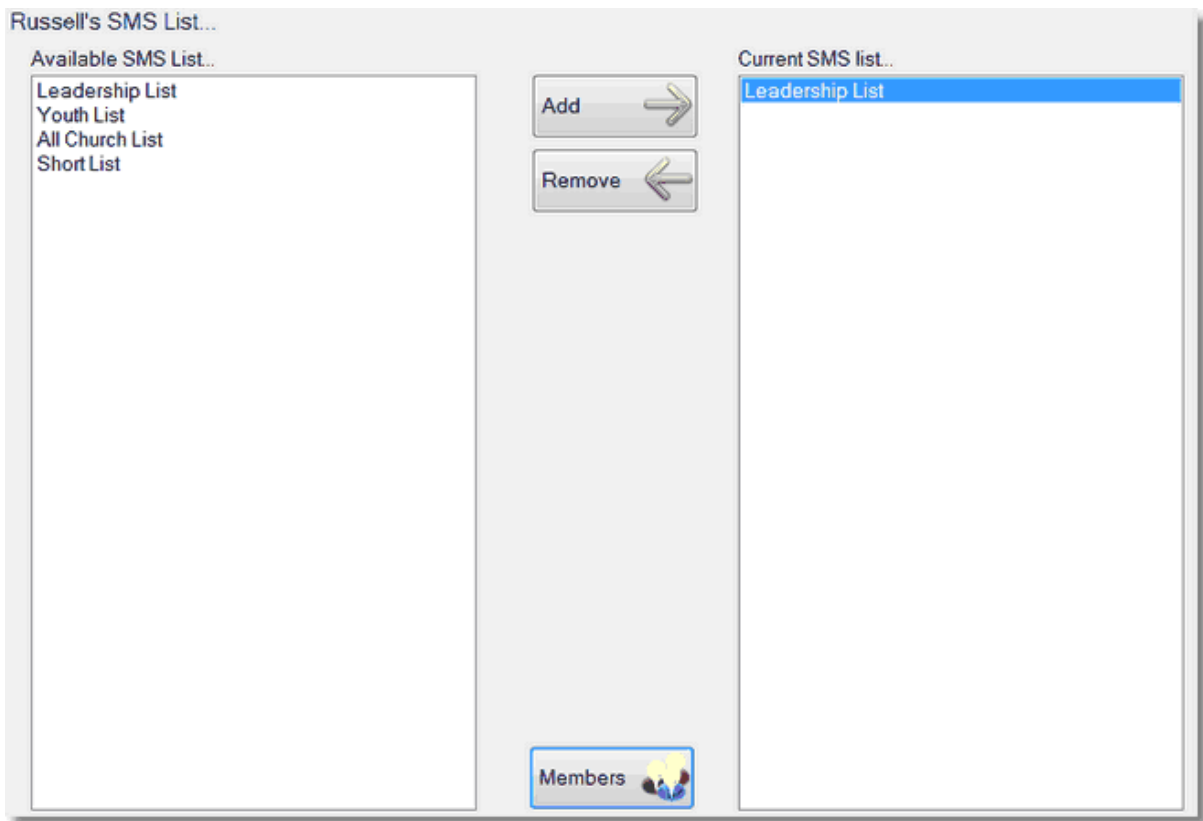
## Add a person to an

### SMS list

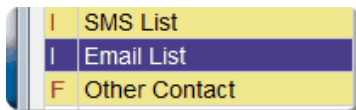
Double click on a list in the Available SMS List area to add them to the Current SMS List for the selected individual

## 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.



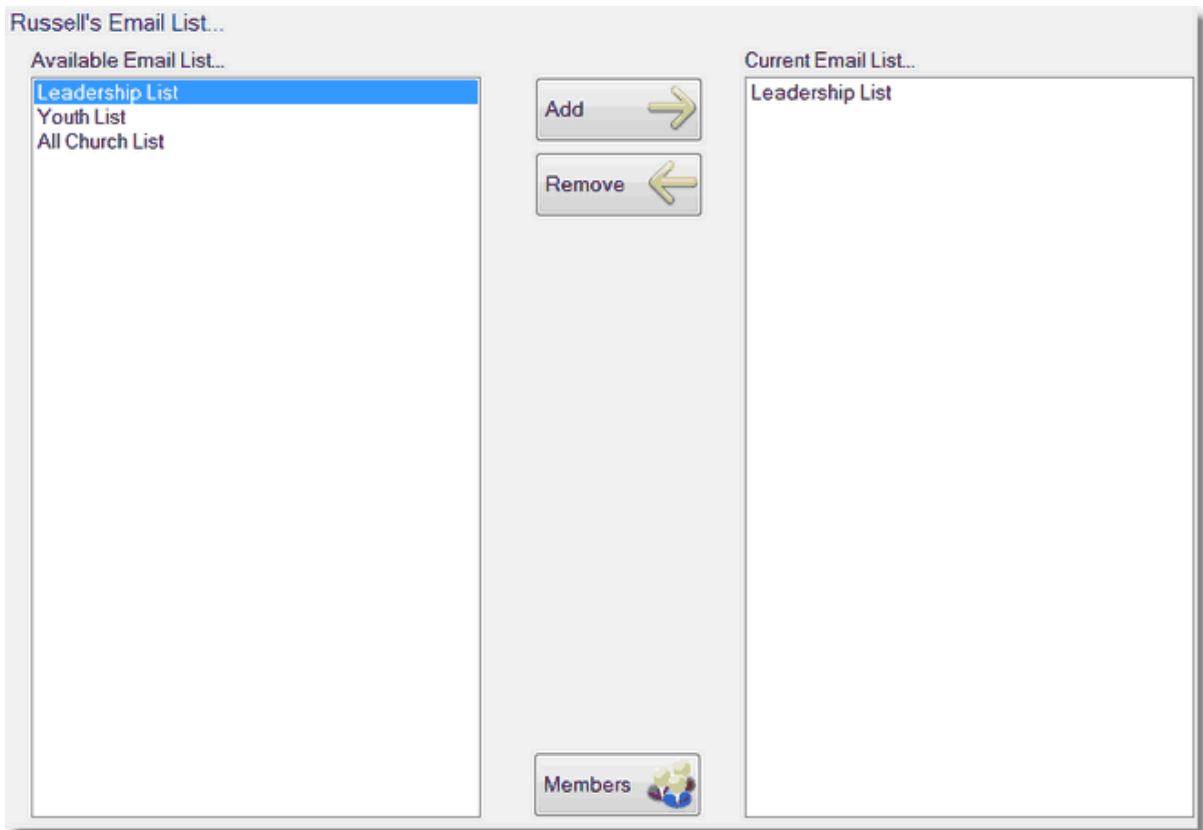
Press the Members button to see a list of all people who are members of the selected / highlighted Email Distribution List.

## 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



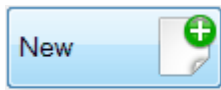
## Other Contact



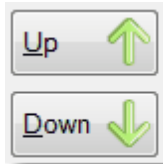
The Other Contact area in Pastoral Care is a Family item, in that it applies to the whole family.

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



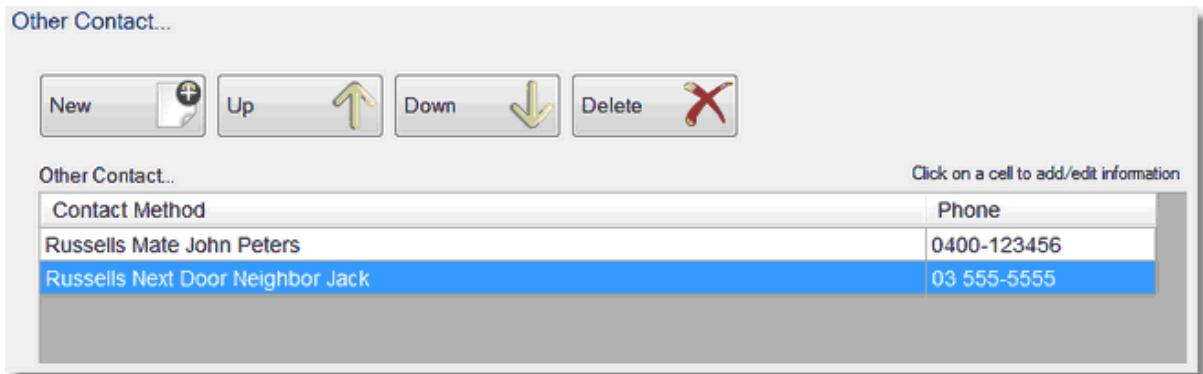
Press the New button to add a new "Other Contact" method



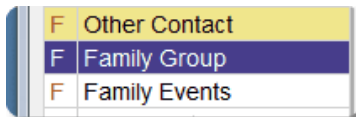
Use the Up and Down arrow buttons to move items in the Other Contact List.



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



## Family Group



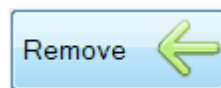
A Family Group is a group that the entire family belongs to or participates in. Some examples could be First Contact Group, a Language Group or a congregational grouping.

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

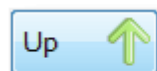
This is accessed by selecting Family Groups from the [Family File Data Areas](#) menu.



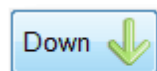
Select an Individual Group from the list of available groups, and press Add to add that group to the currently selected person. You can also just double click on an item in the left hand list to add that to the Current Group list for the selected person.



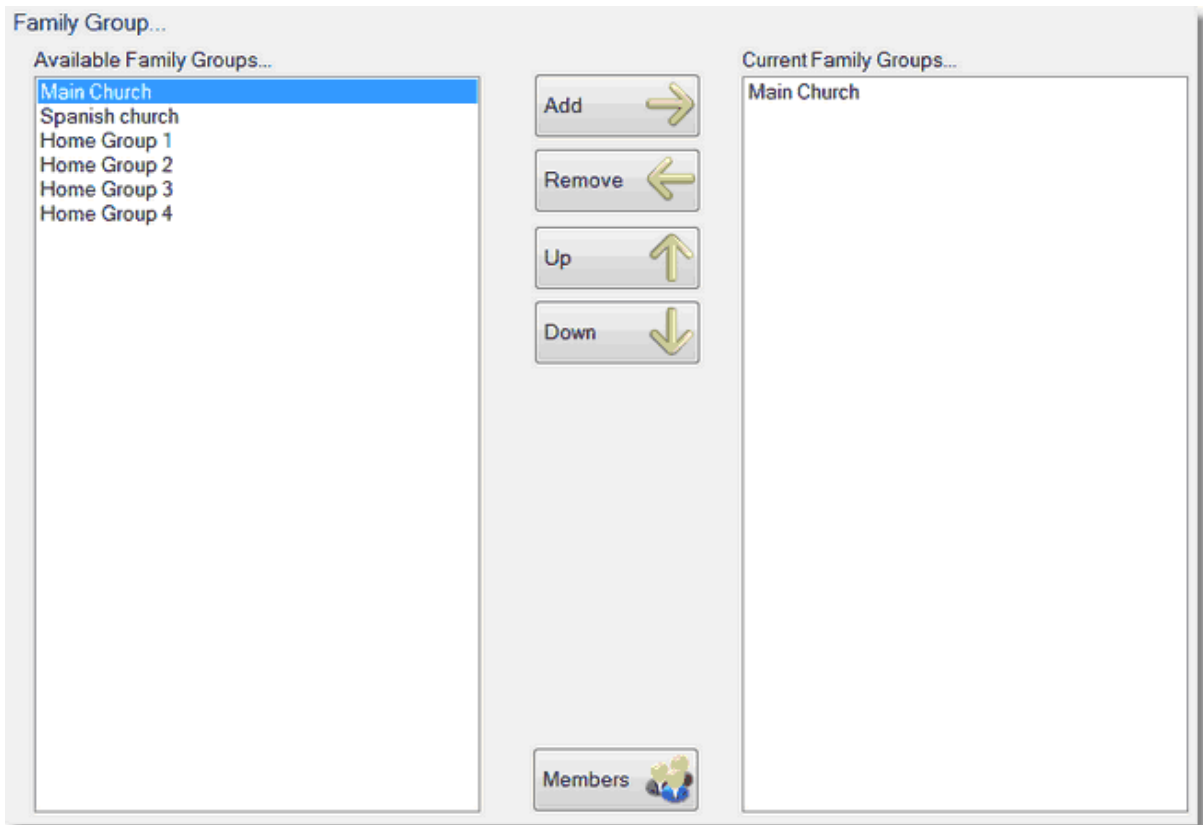
Press the Remove button to remove a selected group from a person. You can also double click on an item in the right hand panel to remove the selected group from the currently selected person.



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





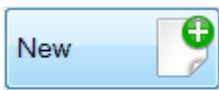


## Family Events

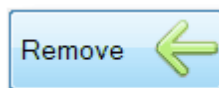


A Family Event is a recorded event that the entire family participated in. Some examples could be First Contact Date, Left Church Date etc.

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.

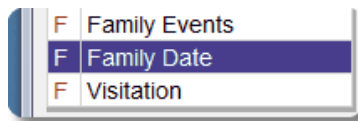
Family Events...

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

Date	Family Event
1/05/2013	Joined Church

Buttons: New (+), Up (↑), Down (↓), Delete (X)

## 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 FamilyDate from the [Family File Data Areas](#) menu.



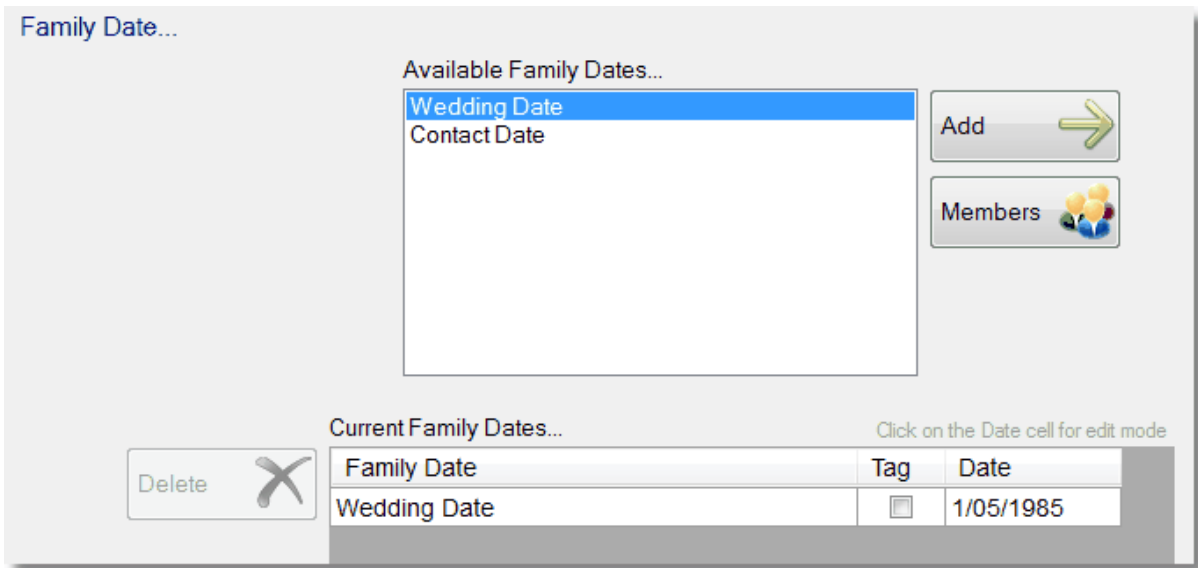
Select a FamilyDate from the list of available dates, and press Add to add that date to the currently selected family. You can also just double click on an item in the left hand list to add that to the Current Dates list for the selected family.



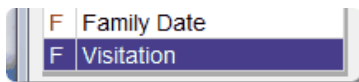
Press this button to view a list of all Families that participate in the selected date.



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

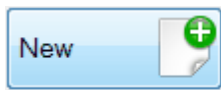


## Visitation

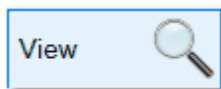


The Visitation area in the family files lets you see short form Pre and Post Visitation Notes, requests for Visit's etc, and also allows you to set an annual target for visiting that family.

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 the View Button to see a larger screen of the visitation data on this window.








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  View  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
06/08/2016		Graham Lawson		

Pre Visitation Note

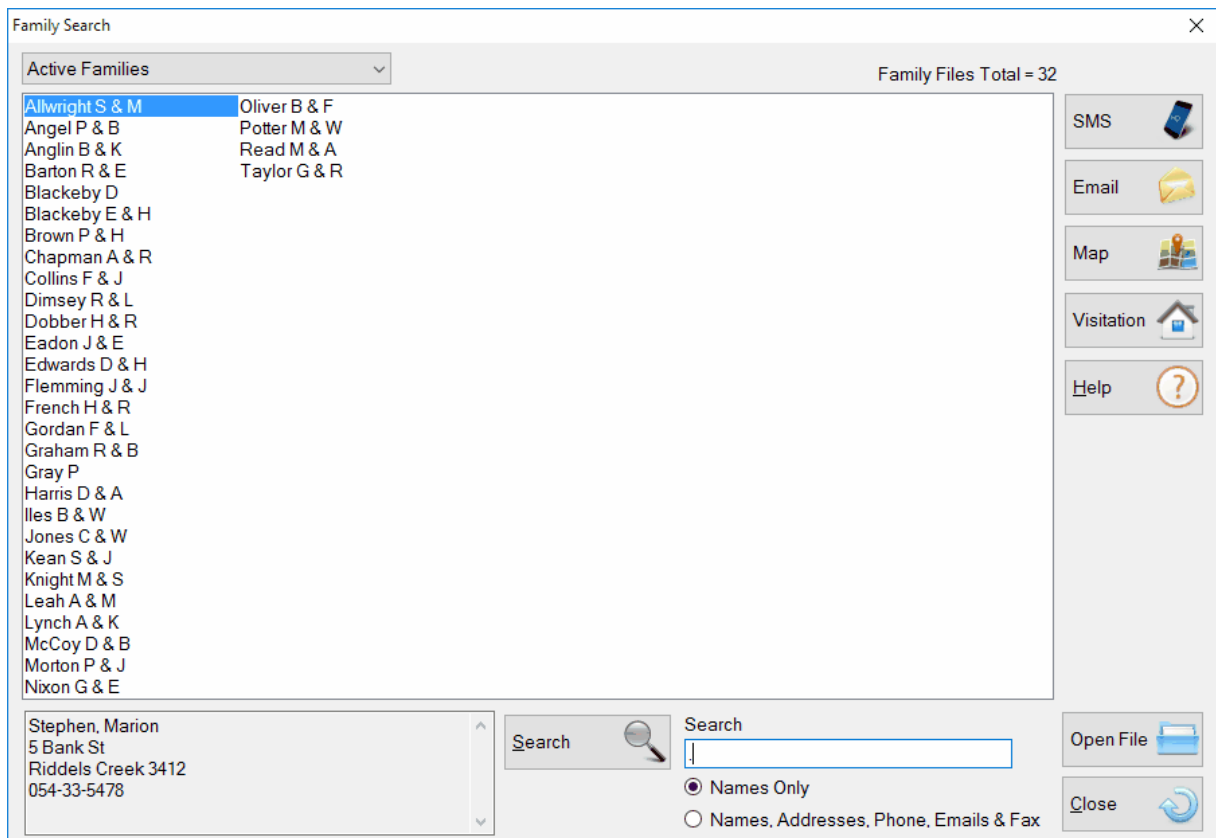
Post Visitation Note

## 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.



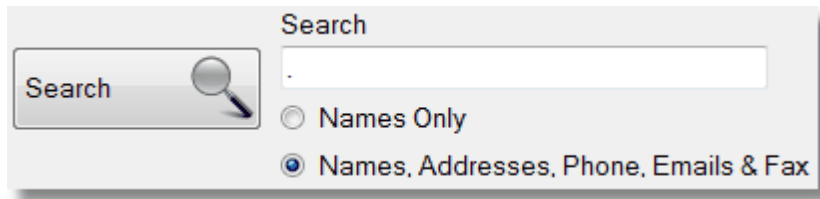
## Family Filter

Active Families

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



The screenshot shows a search interface with a light gray background. On the left is a button labeled "Search" with a magnifying glass icon. To its right is a search input field. Below the input field are two radio button options: "Names Only" and "Names, Addresses, Phone, Emails & Fax". The second option is selected, indicated by a blue dot.

### 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)

The screenshot displays the 'Visitation Management (Church 1) (Belling Street Fellowship)' application. The main window contains a table with the following data:

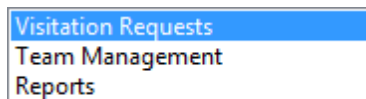
Family	Target	Requests	2015 Visits
Allwright Stephen & Marion			
Angel Peter & Belinda		1	
Anglin Brent & Katey			
Barton Ray & Ethel		1	
Blackeby Dot			
Blackeby Helen		1	
Brown Peter & Heather			
Chapman Adrien & Ruth		1	
Collins Fred & Jill			
Dimsey Richard & Lorraine		1	
Dobber Hugo & Ruby			
Eadon Jack & Edith			
Edwards David & Helen			
Flemming John & Julie			
French Harry & Rose			
Gordan Frank & Lorna		1	
Graham Ross & Brook			
Gray Peter			
Harris Darryn & Annita			
Iles Bill & Wendy			
Jones Charlie & Wendy			
Kean Steve & Jenny			
Knight Mike & Sue			
Leah Adam & Marg			

The 'New Visitation Request' dialog is open, showing the following options:

- Send email upon Create Request
- Team selection: Team 1 (selected), Team 2, Team 3, Team 4
- Visitation assigned To:
 

ToDo	Name
2	Allwright Stephen
0	Allwright Marion
0	Angel Peter
0	Angel Belinda
0	Angel Helen
- Requested by: [Text Field]
- Requested Date: Tuesday, 13 October 2015
- Pre visitation note: [Text Area]
- Buttons: Visitor History, Create Request

## 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.

Visitation Load Options

Load in All People  
 Load in all those with a Visitation Request  
 Load in all those without a Visitation Request  
 Filter families under Target for Completed visits in the year

---

Load Family    Load Individual

#### 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

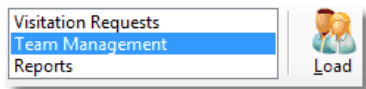
#### Load in all those without a Visitation Request

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

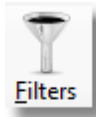
Tick this option to load in families that have not reached their Visitation Target for the entered (current) calendar year.

## 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, 2014 visit's columns shows the number of visit's actually performed in the current calender year.

## Send Email

Send email upon Create Request

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.

## Team Selection

Send email upon Create Request

Team
Elders
Wellness
Leadership

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.

### Assigned To

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

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.


### Requested By

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 Date

Requested Date

Saturday . 1 September 2012 

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.

### Pre Visitation Note

Pre visitation note

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

## 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 'Allwright Stephen'**

Current Requests for Visits Total = 2

Date	Requested By...	Family for Visitation...	Pre Note	Email Sent
21/12/2016	Stephen	Barton R & E		
21/12/2016	Stephen	Angel P & B		

Pre Visitation Note

Chatted to Ray about Eldership Position

History of completed visits Total = 0

Date	Family Visited

Delete

Update Note

Email Request

Close

### Delete

Delete the selected Visitation Request

### Update 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

Wednesday, 21 December 2016

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	Assigned to	Date
<input type="text" value="Stephen"/>	<input type="text" value="Stephen Allwright"/>	<input type="text" value="Wednesday, 21 December 2016"/>

Pre Visitation Note

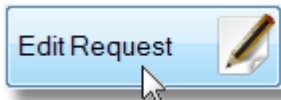
Post Visitation Note

Ray has agreed to be put to the membership for voting in as an elder.

## 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 S & M

Date	Requested By...	Visitation Assigned To...	Pre Note	Email Sent
13/10/2015		Brent Anglin	Yes	No
13/10/2015		Stephen Allwright		No

Pre Visitation Note

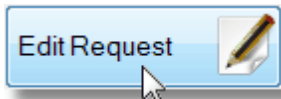
Have a prayer time iwth the Allright Family regarding the sudden illness in their family.

Delete Request

Edit Request

Close


### Edit Request



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


Visitation Request Edit


Allwright S & M

Update Request 

Send email upon Update

Requested by

Requested Date  
 Tuesday .13 October 2015 


Pre visitation notes 

Have a prayer time iwth the Allright Family regarding the sudden illness in their family.

Target 'Completed' visits for 2015 = 0  
 Completed' visits for 2015 = 0



Visitation team

- Team 1
- Team 2
- Team 3
- Team 4

History 

Visitation assigned To

ToDo	Name
3	Anglin Brent
0	Anglin Katey
0	Anglin Mathew
0	Anglin Levi
0	Anglin Kerryn

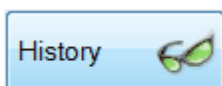
Help  Close 

## 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** Visitation Records = 1

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

Date	Requested By...	Visitation Assigned To...	Pre Note	Post Note
06/08/2016		Graham Lawson		Yes

**Pre Visitation Note**

**Post Visitation Note**

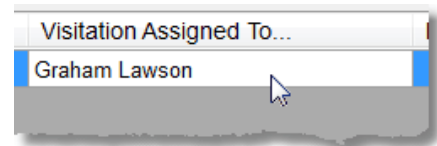
Marien has requested prayer for her mother

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

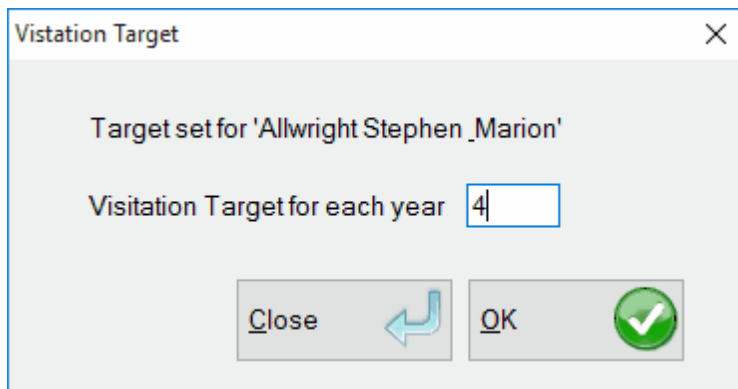
## Save

Save any changes made on this form

## Close

Close this form and return to Visitation Management



## Target



Visitation Target

Target set for 'Allwright Stephen\_Marion'

Visitation Target for each year

Close  OK 

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 14 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.

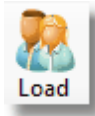
1. Select any Filters to restrict the names of people you want to select from to a specific ministry or group etc,
2. Press Load to load people into the Available People List
3. Select one of the available Team Names
4. Double click on a name in the Available People list to push them across to the Team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



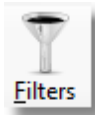
Click on each area of this screen to learn more.

## Load



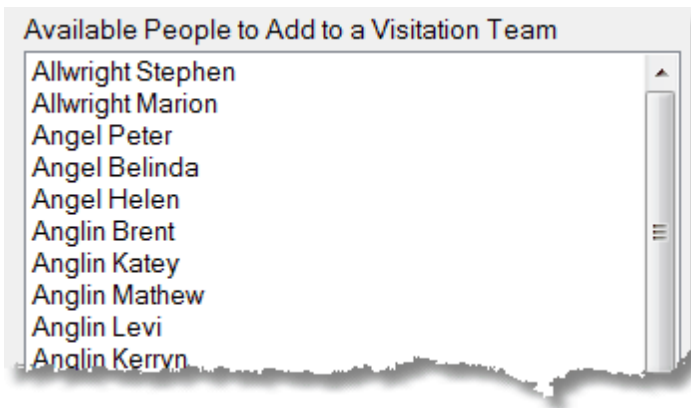
Press the Load Button to load all (filtered) people into the [Available People](#) list.

## Filters



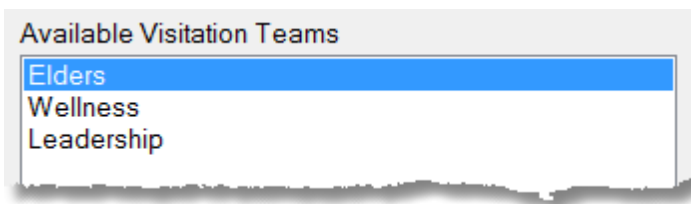
Use the Filters button to load in selected groups, ministries etc into the Available People list. See reporting [Filters](#) for full information on using filters in Pastoral Care.

## Available People



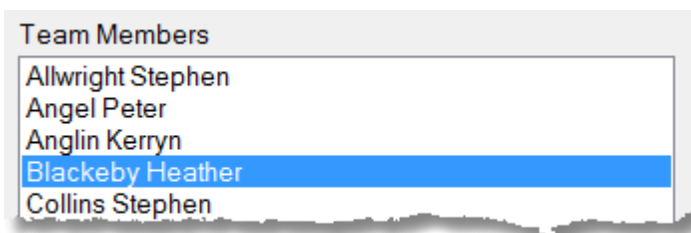
The list of available people is a list of people you have Loaded using the Load Button, it may be all people (default) or a selected group of people based on [Filters](#) you have used.

## 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



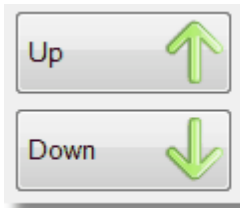
This is the list of Visitation Team Members for the selected team.

#### Add



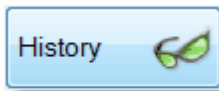
Press this button to add the selected person to the selected Visitation Team.

#### 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

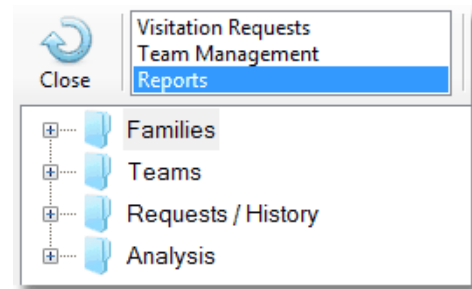
These reports show Requests for Visit's by Team Members, Teams and also grouped by Team Member Surnames. They also show the same report styles for Visitation History as well.

## 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.

**Report Options**

Visitation Request data to include...


- Request Date
- Visitation Assigned to
- Visitation Team
- Requested By
- Email Request
- Pre Visit Notes

## Sample Report

**Families With Visitation Requests**

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



---

Allwright	Stephen & Marion
	<b>Request Date:</b> 31/08/2012
	<b>Assigned To:</b> Ethel Barton
	<b>Visitation Team:</b> Wellness
	<b>Requested By:</b> Peter
	<b>Email Request been Sent:</b> No
	<b>Pre Visit Notes:</b> Visit Stephen to discuss Eldership

---

Angel	Peter & Belinda Helen
	<b>Request Date:</b> 31/08/2012
	<b>Assigned To:</b> Ethel Barton
	<b>Visitation Team:</b> Wellness
	<b>Requested By:</b> john
	<b>Email Request been Sent:</b> No
	<b>Pre Visit Notes:</b> Please Visit to Belinda for encouragement. She has been unwell for a few weeks.

## 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 Records

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.

**Visitation Options**

Order dates By...

As entered  
  Ascending  
  Descending

Include Completed Visitation Records from the family file  
 Include Pre Visitation Notes  
 Include Post Visitation Notes

Include Visitation Request  
 Include Visitation Notes from the Family NoteBook

Display only Families with Visitation Data  
 Activate Date Filtering

Tuesday ,13 October 2015  To  
 Tuesday ,13 October 2015

## Sample Report

### Family Visitation Report

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



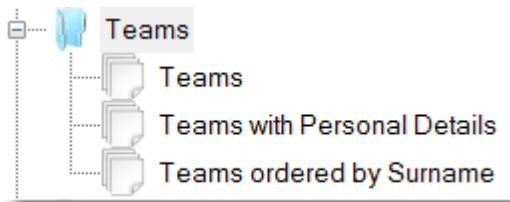
Allwright	Stephen & Marion		
	<b>Date</b>	<b>Requested By...</b>	<b>Assigned To...</b>
	6/08/1993		Graham Lawson
Anglin	Brent & Katey		
	Mathew, Levi, Kerryn		
	<b>Date</b>	<b>Requested By...</b>	<b>Assigned To...</b>
	2/09/2012	John	Ethel Barton
Dimsey	Richard & Lorraine		
	Sarah, Karren, Dodie, Mandy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

Report Option



Available Teams

Team 1

Team 2

Team 3

Team 4

Cancel  Continue 

## 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.

**Report Option**

**Available Teams**

Team 1

Team 2

Team 3

Team 4

Cancel 
Continue

## 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
Kerryn Anglin	10 Marsh Road Keilor Heights 3191 VIC	03-273214	(F)041234567890	(F)BrentI@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	03754-2254	(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)richardI@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	5/07/1946
Levi Anglin	10 Marsh Road Keilor Heights 3191 VIC	03-273214	(P)041234567890	(F)BrentI@spirit.com.au	3/08/1985
Mathew Anglin	10 Marsh Road Keilor Heights 3191 VIC	03-273214	(P)041234567890	(F)BrentI@spirit.com.au	12/03/1990
Brent Anglin	10 Marsh Road Keilor Heights 3191 VIC	03-273214	(F)041234567890	(F)BrentI@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.

Report Option

Available Teams

- Team 1
- Team 2
- Team 3
- Team 4

Cancel  Continue 

### 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 / History**

- Request for an individual Team Member
- Request ordered by Team
- Request ordered by Surname
- History for an individual Team Member
- History ordered by Team
- History ordered Surname

#### 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

**Report Option**

**Available Teams**

- Team 1
- Team 2
- Team 3
- Team 4

**Team Members**

- Allwright Stephen
- Allwright Marion
- Angel Peter
- Angel Belinda
- Angel Helen

**Activate Date Filtering**

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**Include Requested By**

**Include Pre Visit Note**

**Include Email Sent**

**Include Address**

### Include...

Choose to include selected additional information on the report.

### Sample Report

## Visitation Request



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

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

### 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

To

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

**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.

**Report Option**

**Available Teams**

- Team 1
- Team 2
- Team 3
- Team 4

Activate Date Filtering

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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

## 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

- Team 1
- Team 2
- Team 3
- Team 4



Activate Date Filtering

Tuesday , 13 October 2015 

To

Tuesday , 13 October 2015 

Include page break after each team

Cancel  Continue 

## Sample Report

## Visitation Completed History by Team



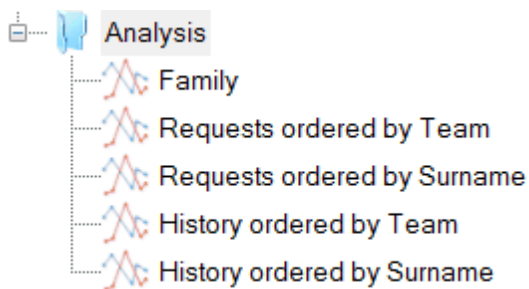
Visitation Team	Team Member	Completed Date	Family Visited
Wellness	Ethel Barton	2/09/2012	B & K Anglin

## 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.

Report Option

Total Visits for the year... 2015

All Visits

Only include families with analysis values

Cancel 
Continue

## 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**

- Team 1
- Team 2
- Team 3
- Team 4

Activate Date Filtering

Tuesday , 13 October 2015

To

Tuesday , 13 October 2015

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**

- Team 1
- Team 2
- Team 3
- Team 4

**Activate Date Filtering**

Tuesday , 13 October 2015

To

Tuesday , 13 October 2015

**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**

- Team 1
- Team 2
- Team 3
- Team 4

Activate Date Filtering

Tuesday , 13 October 2015

To

Tuesday , 13 October 2015

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

To

Include page break after each person

### 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](#).

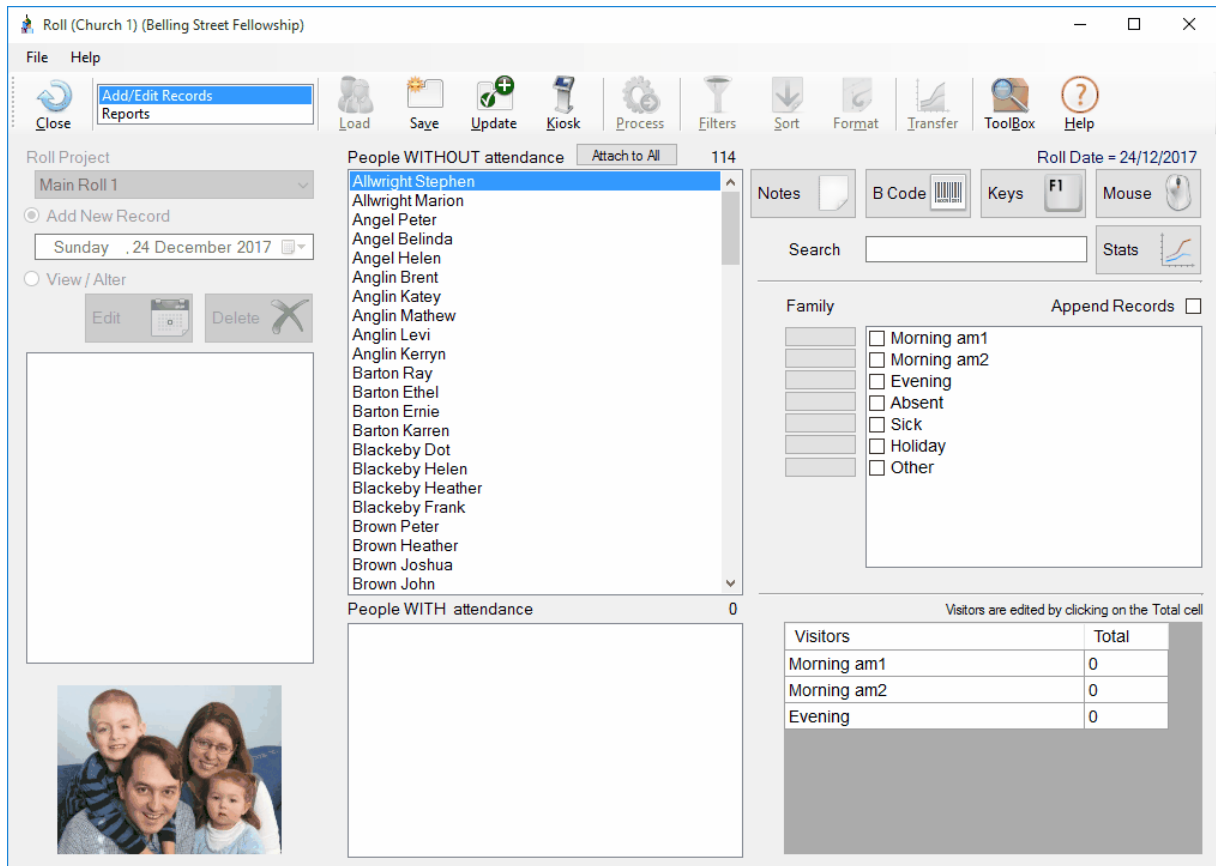
If you are new to the Roll Program, and you have not set this up yet, you need to go to Settings - Roll / Finance / Weekly area. See [Roll](#) settings for more details.

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.



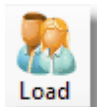
You can click on different areas on this graphic to learn about each area of this window.

Please note: Some items shown below are disabled. Not all features are available in all circumstances.



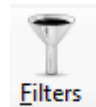
## Roll Area Toolbar

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.



**Filters**

Use Filters to restrict the list of people you are working through for the particular Roll you are entering.



**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.



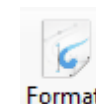
**Sort**

This button is only available for selected reports, and is described in the Roll [Reports](#) area.



**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.

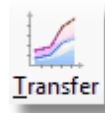


**Format**

This is the standard Pastoral Care Format control. This is available in all reporting areas. Full details can be found at [Format](#)



Put the Roll program into Table Mode for large easy to use Touch Screen.



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.

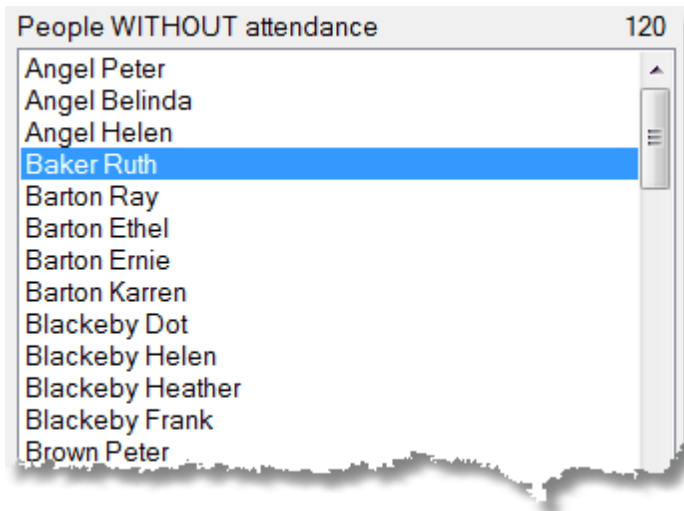


Press Process to display a selected report. This button is only available for Roll [Reports](#).



[See Toolbox](#) for full details on the Toolbox Button

### People Without Attendance

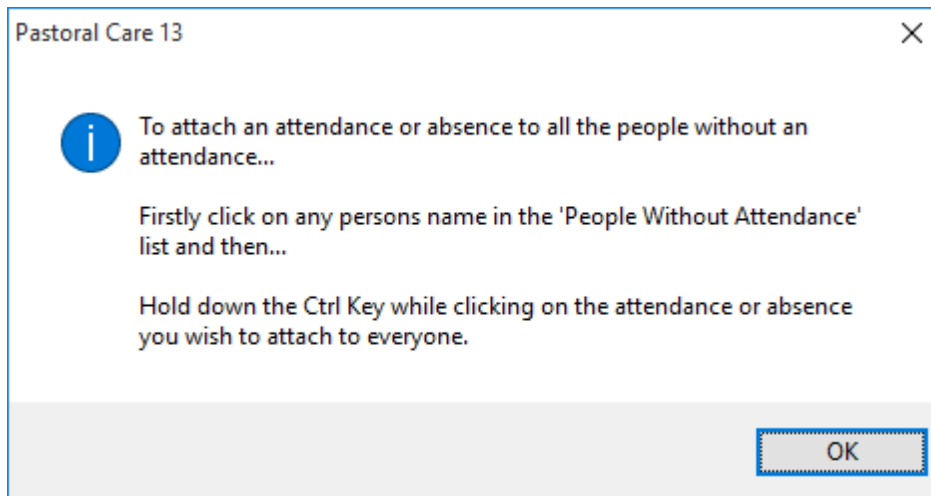


This list of people are people you have Loaded into the Roll area, but you have not yet assigned an attendance state to them. These people are still undecided! If you leave people in this list and process the roll, those people will be recorded with a system assigned attendance status of "Unknown".

The Number 140 in the top right corner indicates in our example that there are still 140 people to mark off with an attendance state.

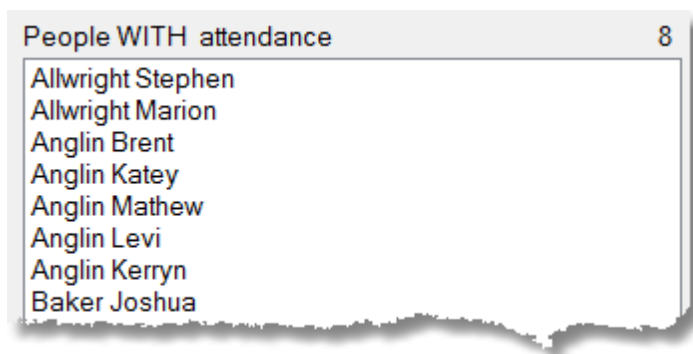
## Attach To All

Pressing this button will simply display a pop up message explaining a new feature.



Use this feature carefully. It explains that if you select a person from the People Without An Attendance list, then press and hold the control key on your keyboard, then use the mouse to click on an attendance code (such as AM Service) then all people who have no attendance status yet, will be given the attendance status you have click on.

## 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.

**Roll Key Attendance Setup**

Key	Attendance
F2	<input checked="" type="checkbox"/> Morning am1
F3	<input checked="" type="checkbox"/> Morning am2
F4	<input type="checkbox"/> Evening
F5	<input type="checkbox"/> Absent
F6	<input type="checkbox"/> Sick
F7	<input type="checkbox"/> Holiday
F8	<input type="checkbox"/> Other
F9	
F10	
F11	
F12	
0	

When attaching a pre programmed attendance to the whole family press and hold down the CTRL key before pressing the pre programmed key on a family member.

---

To delete an attendance on a person, first highlight the persons name who has the attendance then press the Del Key.

Cancel 
Close

## 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).

Roll Mouse Attendance Setup

When the left mouse button is double clicked or the enter key is pressed in the Search entry box on a person the following attendances will be added to the individual.

- Morning am1
- Morning am2
- Evening
- Absent
- Sick
- Holiday
- Other

Added to Individual    Added to Family

## 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!

## Stats



Press the Stats button to see live statistics for the current roll you are entering.

Statistics for Opened Roll					
Event	Total	Absent State	Total	Visitors	Total
Morning am1	4	Absent	0	Morning am1	0
Morning am2	9	Sick	0	Morning am2	0
Evening	0	Holiday	0	Evening	0
		Other	0		
Total amount of people yet to be given an attendance : 101 Total amount of people attending one or more event : 13 Total amount of people attending all events : 0					
					<input type="button" value="Close"/>

## Family and Individual Attendance

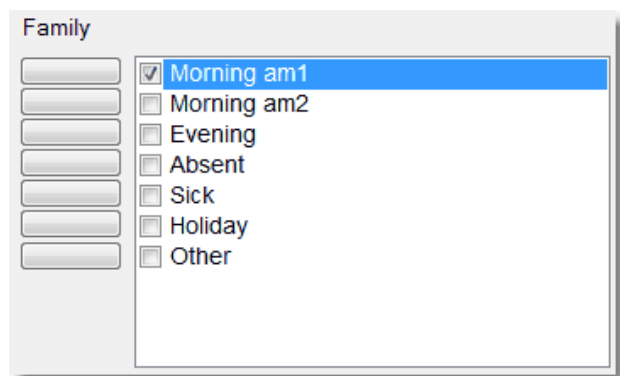
When a person is selected in either the [People Without Attendance](#) list or the [People With Attendance](#) list, you can select (by simply clicking) an attendance state. For example, select a person from the People Without Attendance list and click on Morning AM1 to add them to that event. Click 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!



## 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

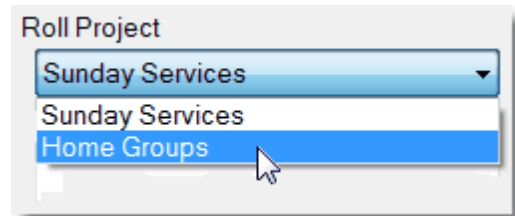
### Adding Roll Records

The process of adding a Roll Record involves the following steps.

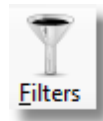
#### Step Description

- 1 Select the roll project that you want to enter a Roll on. For example, Church Services, Home Groups etc

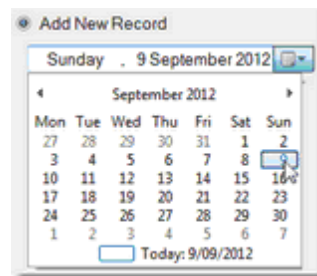
In our example (right) we are selecting the Home Groups project.



- 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

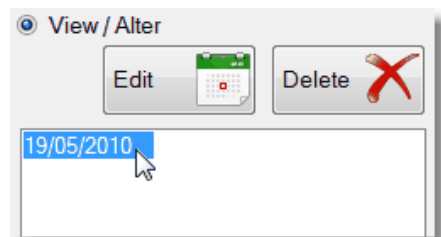
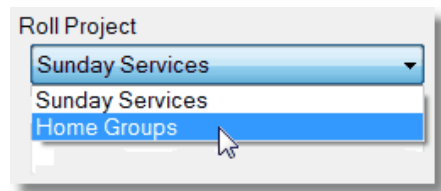


### View / Alter

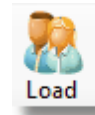
The ability to View or Alter a Roll Record is very Simple. This allows you to later Transfer information to the [Weekly Statistics](#) area, or even update some Roll information after a Roll has been saved.

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<br><br>In our example (right) we are selecting the Home Groups project. |
| 2    | Choose View / Alter and then Select a Date available in the list.   |



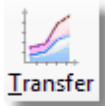
- 3 Press the Load Button on the toolbar to load the selected Roll for editing.



- 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.

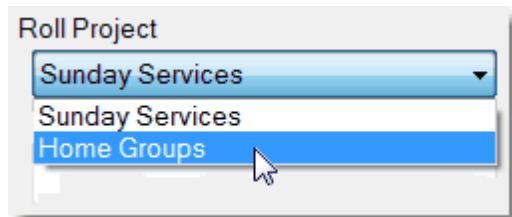
See Setting up Pastoral Care - [Setup Roll - Finance - Weekly Project](#) for information on setting up these related areas.

## Transferring Roll Data to Weekly Statistics

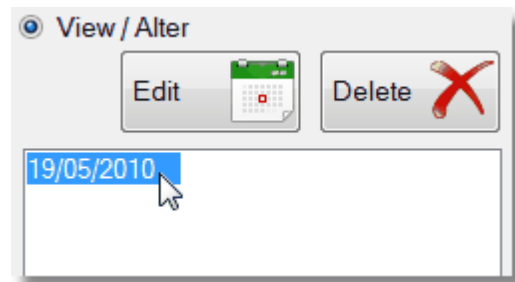
To transfer Roll Data to Weekly Statistics, follow these steps.

- 1 Select the roll project that you want to transfer a Roll from. For example, Church Services, Home Groups etc

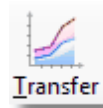
In our example (right) we are selecting the Home Groups project.



- 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

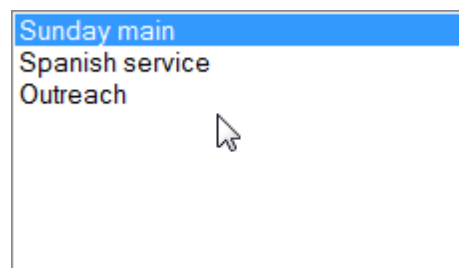
Sunday .25 December 2016

	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.





### 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.

Transfer to Weekly Group

AM Attendance

AM Attendance

S/S Attendance

### 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.

Roll Project

Sunday Services

Sunday Services

Home Groups

- 2 Choose View / Alter and then Select a Date available in the list.

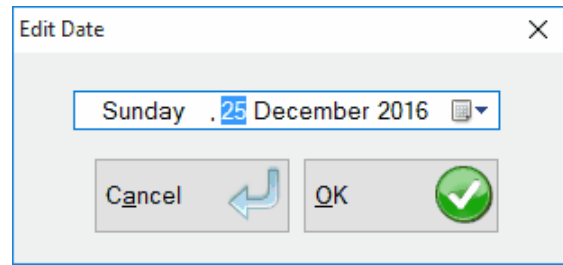
View / Alter

Edit

Delete

19/05/2010

- 3** Press the Edit Button and select a new date for the Roll Record. Pastoral Care will not let you overwrite an existing date.

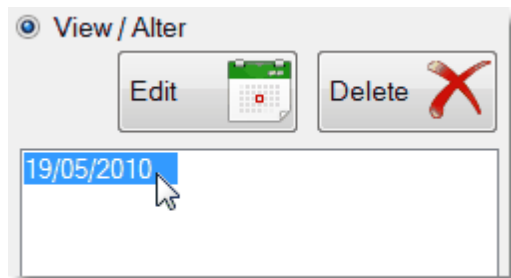
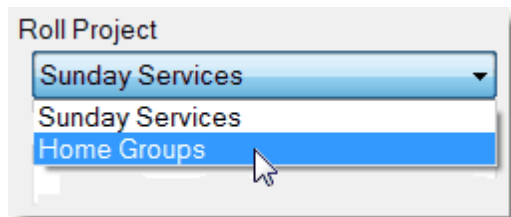


## Delete A Roll Record

If you wish to delete a Roll Record, you can follow this procedure. Note: Deleting a Roll Record cannot be undone.

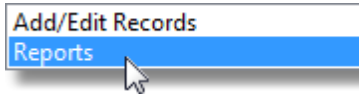
The Steps to alter a Roll Record are as follows...

- | <b>Step</b> | Description  |
|-------------|--|
| <b>1</b>    | <p>Select the roll project that you want to enter a Roll on. For example, Church Services, Home Groups etc</p> <p>In our example (right) we are selecting the Home Groups project.</p> |
| <b>2</b>    | <p>Choose View / Alter and then Select a Date available in the list.</p>   |
| <b>3</b>    | <p>Press the Delete Button (Shown Above) to remove the Roll Data stored against that Roll Project / Date.</p>  |



## Reports

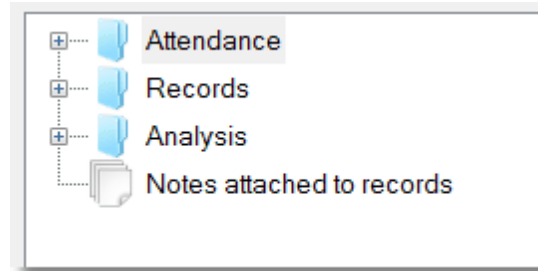
Pastoral Care Roll Reports are designed to inform you about the attendance patterns and absence from events from people in your church. To access the Roll Reports area, select Reports from the Roll area tool bar.



### 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](#)

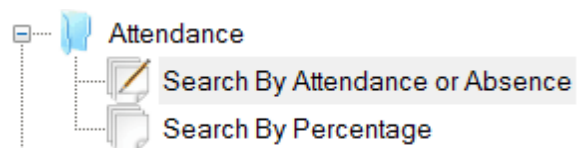
[Format](#)

## 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...



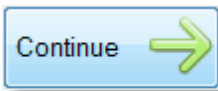
## Search By Attendance or Absence

### 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 Main Roll 1 Report Mode  Family  Individual

---

Search from 25/12/2016 To 25/12/2016

---

**Attendance or Absence to search**

- Morning am1
- Morning am2
- Evening
- Absent
- Sick
- Holiday
- Other
- Unknown

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

- Names Report
- Manual Report
- All Family Information
- Standard Reports
- Custom
- Analysis

Help 
Close 
Continue

Roll Project Sunday Services

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.

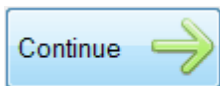
### Search By Percentage

#### 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

Report Mode  Family  Individual

Search from  To

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

Include in report only those with the following percentage range...

To

Include percentage with given name

Names Report  
Manual Report  
All Family Information  
Standard Reports  
Custom  
Analysis

Help ? Close Refresh Continue →

### Roll Project

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.

### Date Range

Search from  To

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 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

Report Mode  Family  Individual

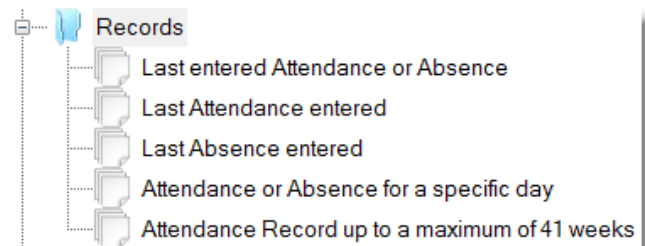
Choose to force the selected report to Family Mode or Individual Mode. This setting will override any settings in the Sort area.

## 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.

Report Setup

Roll Project

Search Period

### 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.

Report search starting from 9/09/2012			Date	Attendance
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.

Report Setup

Roll Project  ▾

Search Period  ▾

### 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.

Roll Last Absence Report				
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.

Report Setup

Roll Project: Main Roll 1

Search Period: 25/12/2016

Buttons: Cancel, Continue

## 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.

Specific Date Report		
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.

The screenshot shows a 'Report Setup' dialog box with the following fields and options:

- Roll Project:** A dropdown menu set to 'Main Roll 1'.
- Search period:** A dropdown menu set to '25/12/2016'.
- Look back:** A text input field containing '40' followed by the text 'Records'.
- Attendance to report on:** A list box with three items, each with a checked checkbox:
  - Morning am1
  - Morning am2
  - Evening (highlighted in blue)
- Buttons:** 'Cancel' with a left-pointing arrow and 'Continue' with a right-pointing arrow.

### 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.

Legend:		Space = No Record	Dates	0	2	2	1	0	2	1	0	0	2	1	1	0	2	2	1	0	3	2	1	1	0	2
Numbers = Number of services attended				4	7	0	3	6	3	6	9	2	5	8	1	4	8	1	4	7	1	4	7	0	3	6
A = Absent				/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	
B = Sick				1	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
C = Holiday				2	1	1	1	1	0	0	0	0	9	9	9	9	8	8	8	8	7	7	7	7	6	
D = Other				/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
				2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	
				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Name				1	1	1	1	1	1	1	1	1	1	1	1	1	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	0	0	
Allwright	Stephen																									
Allwright	Marion			1	1	2	1	1	1	1	1	2	A	1	2	1	2	1	A	1	2	2	1	1	A	1
Angel	Peter			1	2	1	1	1	1	1	1	1	1	1	2	1	1	1	2	1	1	1	1	1	1	1
Angel	Belinda																									
Angel	Helen			1	2	1	1	1	1	1	1	1	1	2	1	1	1	2	1	1	1	1	1	1	1	1
Anglin	Brent			1	2	1	1	A	1	1	2	1	1	2	1	1	1	B	2	A	1	1	1	1	1	1
Anglin	Katey			2	2	1	1	A	1	1	2	1	1	2	1	1	1	B	2	A	1	1	1	1	1	1
Anglin	Mathew			2	2	1	1	A	1	1	2	1	1	2	1	1	1	B	2	A	1	1	1	1	1	1
Anglin	Levi			2	2	1	1	A	1	1	2	1	1	2	1	1	1	B	2	A	1	1	1	1	1	1
Anglin	Kerryn			2	2	1	1	A	1	1	2	1	1	2	1	1	1	B	2	A	1	1	1	1	1	1
Baker	Joshua																									
Baker	Ruth																									
Barton	Ray																									

### 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...

- Analysis
  - Individual
  - Family
  - Specific Day
  - Look Back
  - Block - Percentage
  - Block - Attendance Total

### 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.

**Roll Individual Analysis**

Roll Project Main Roll 1 ▾

Analysis from 25/12/2016 ▾ To 25/12/2016 ▾

- Allwright Stephen
- Allwright Marion
- Angel Peter
- Angel Belinda
- Angel Helen
- Anglin Brent
- Anglin Katey
- Anglin Mathew
- Anglin Levi
- Anglin Kerryn
- Barton Ray
- Barton Ethel
- Barton Ernie
- Barton Karren
- Blackeby Dot
- Blackeby Helen
- Blackeby Heather
- Blackeby Frank
- Brown Peter
- Brown Heather
- Brown Joshua
- Brown John
- Chapman Adrien
- Chapman Ruth
- Chapman Hannah
- Collins Fred
- Collins Jill
- Collins Stephen
- Dimsey Richard
- Dimsey Lorraine
- Dimsey Sarah
- Dimsey Karren
- Dimsey Dodie

Include Graph

Graph

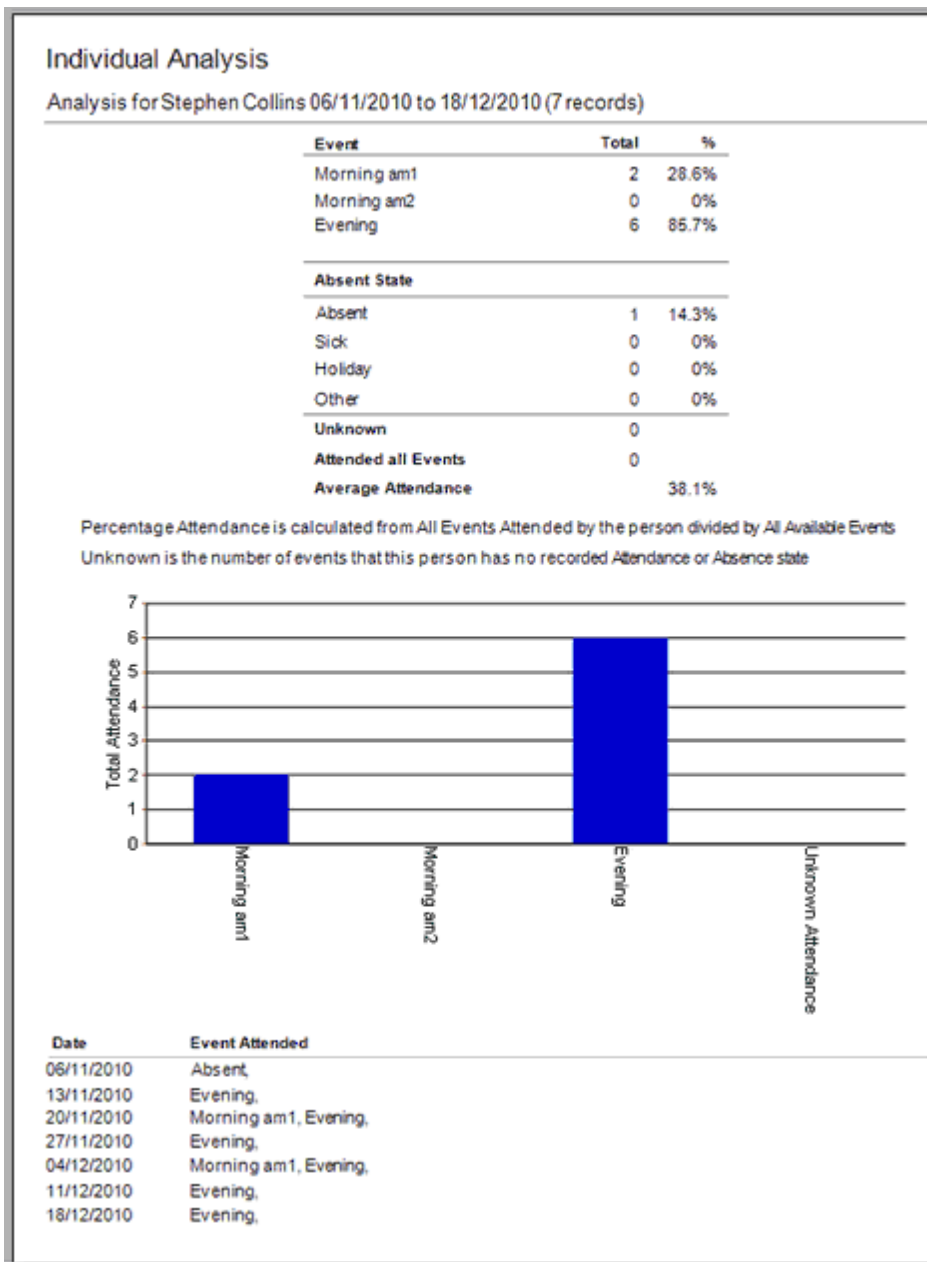
Help

Close

Continue

## Sample Report

Shown below is a sample Individual Analysis roll Report.



## 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.


**Roll Individual Analysis**


Roll Project Main Roll 1 ▾


Analysis from 25/12/2016 ▾ To 25/12/2016 ▾


- Allwright Stephen
- Allwright Marion
- Angel Peter
- Angel Belinda
- Angel Helen
- Anglin Brent
- Anglin Katey
- Anglin Mathew
- Anglin Levi
- Anglin Kerry
- Barton Ray
- Barton Ethel
- Barton Ernie
- Barton Karren
- Blackeby Dot
- Blackeby Helen
- Blackeby Heather
- Blackeby Frank
- Brown Peter
- Brown Heather
- Brown Joshua
- Brown John
- Chapman Adrien
- Chapman Ruth
- Chapman Hannah
- Collins Fred
- Collins Jill
- Collins Stephen
- Dimsey Richard
- Dimsey Lorraine
- Dimsey Sarah
- Dimsey Karren
- Dimsey Dodie

Include Graph  
  

Graph 

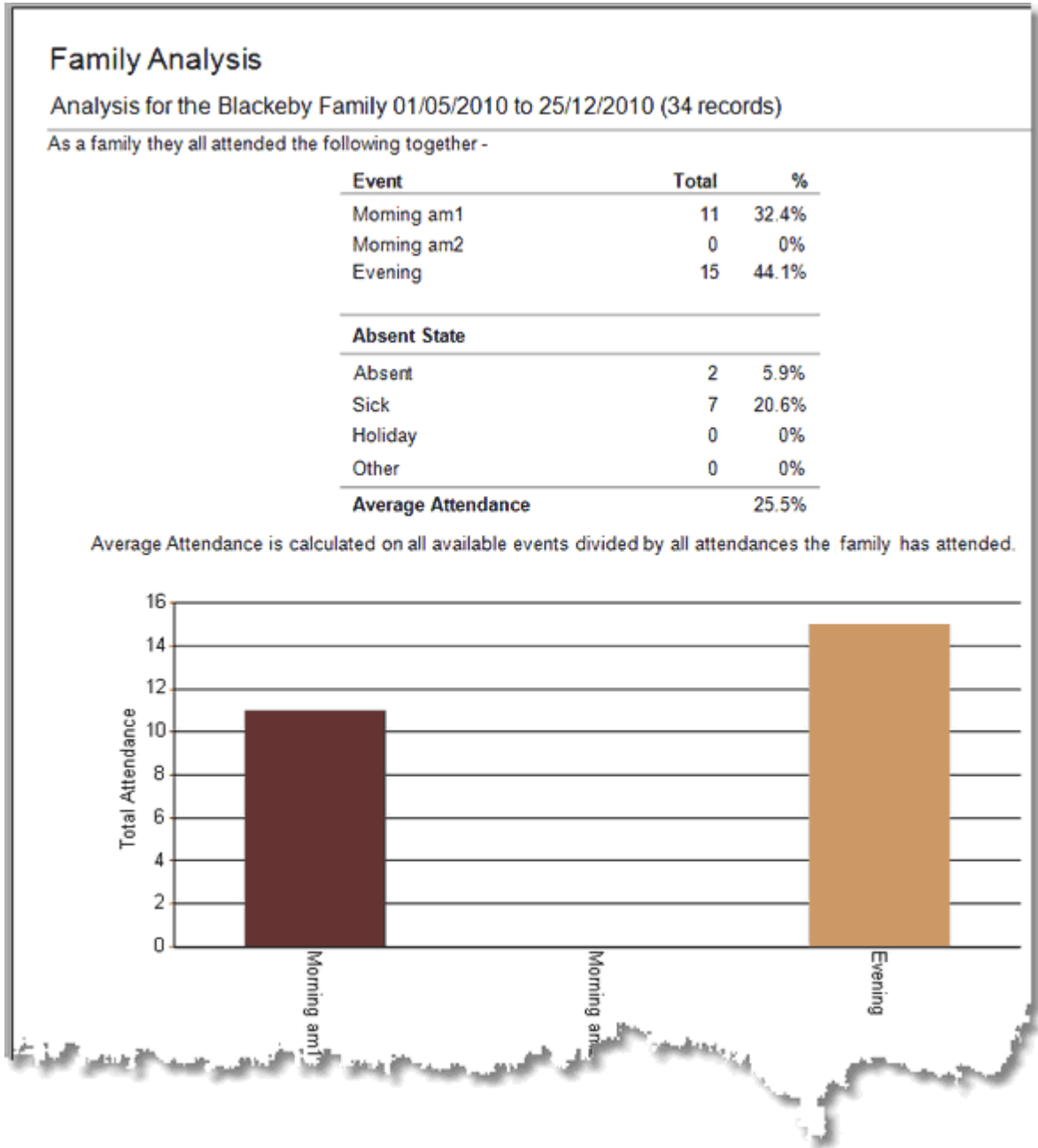
Help 

Close 

Continue 

### Sample Report

A sample Family Analysis report is shown below. Attendance here is based on the entire family attending an event.



### 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

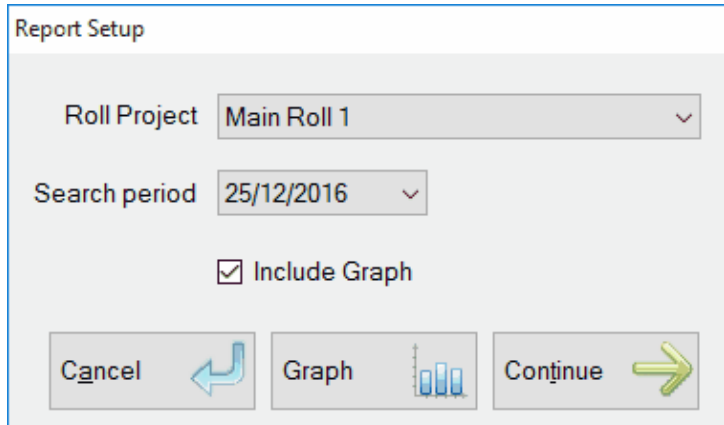
Tick this option to include a graph with this report.

### 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 Main Roll 1

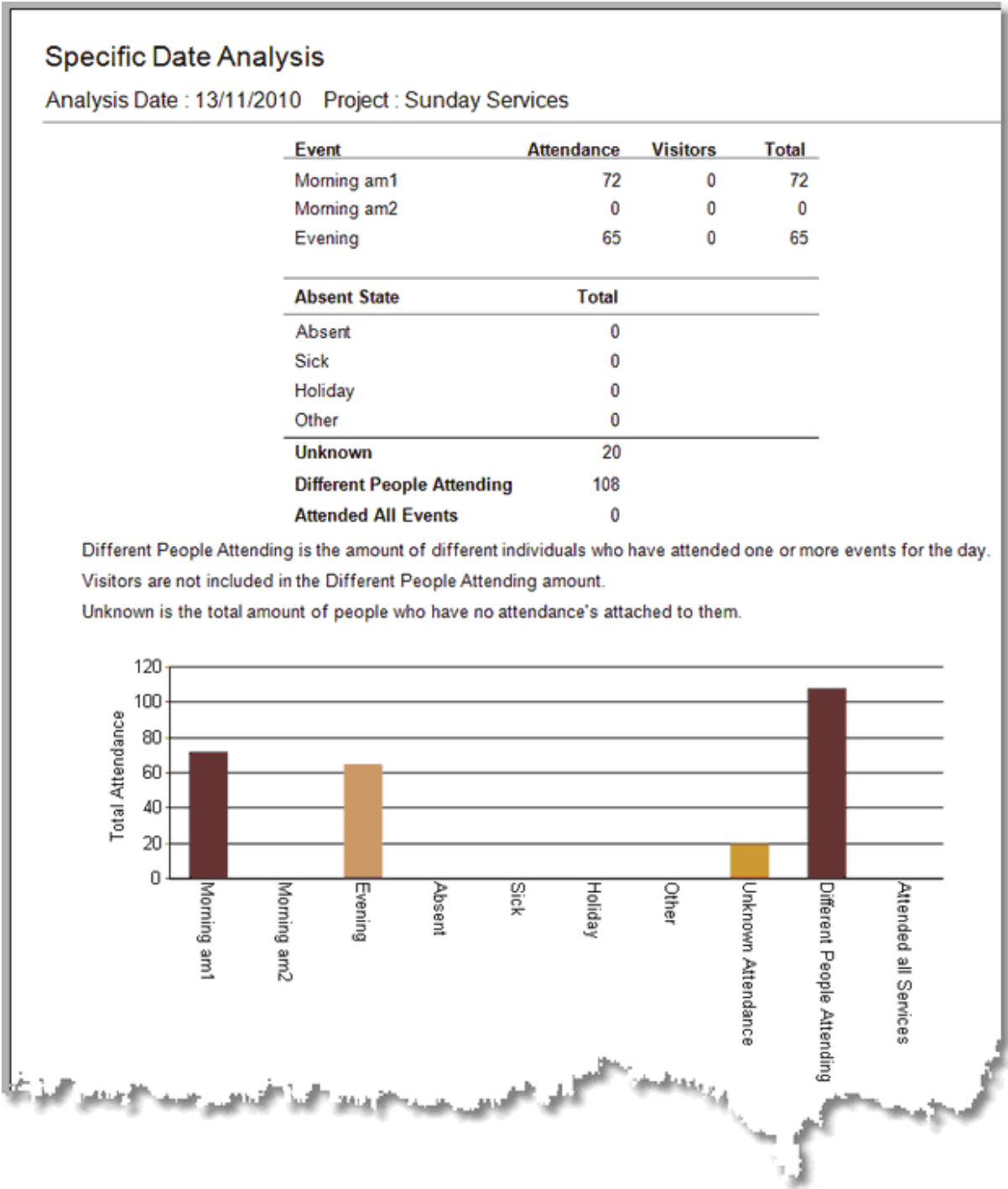
Search period 25/12/2016

Include Graph

Cancel Graph Continue

**Sample Report**

A sample Specific Date report is shown below.



**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.

<b>Look Back Analysis</b>			
18/12/2010 to 22/05/2010 Project : Sunday Services (30 Records)			
<b>Event</b>	<b>Averages</b>		
	<b>Attendance</b>	<b>Visitors</b>	<b>Total</b>
Morning am1	45.4	0	45.4
Morning am2	0	0	0
Evening	0	0	0
<b>Absent State</b>	<b>Average Total</b>		
Absent	15		
Sick	8.2		
Holiday	1.5		
Other	0.4		
<b>Different People Attending</b>	45.4		
<b>Attended All Events</b>	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 Percentage

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.

The screenshot shows a 'Report Setup' dialog box with the following fields and options:

- Roll Project:** Main Roll 1 (dropdown menu)
- Search from:** 25/12/2016 (dropdown menu)
- Look back:** 20 Records (input field)
- Attendance to Analyse:** A list box containing three items: Morning am1, Morning am2, and Evening. All three items have checkboxes that are checked. 'Morning am2' is currently selected.
- Record amount to analyse in each block?:** 4 Records (input field)
- Buttons:** Help (with a question mark icon), Cancel (with a left arrow icon), and Continue (with a right arrow icon).

### 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

### Sample Report

Shown below is a sample block analysis report.

# = No data available for analysis		24/12/2017	11/12/2016	13/11/2016	09/10/2016	11/09/2016
		To 18/12/2016	To 20/11/2016	To 16/10/2016	To 18/09/2016	To 21/08/2016
Allwright	Stephen	#	#	#	#	#
Allwright	Marion	50%	41.7%	33.3%	33.3%	50%
Angel	Peter	50%	41.7%	33.3%	33.3%	41.7%
Angel	Belinda	#	#	#	#	#
Angel	Helen	50%	41.7%	33.3%	33.3%	41.7%
Anglin	Brent	33.3%	33.3%	25%	50%	25%
Anglin	Katey	33.3%	41.7%	25%	50%	25%
Anglin	Mathew	33.3%	41.7%	25%	50%	25%
Anglin	Levi	33.3%	41.7%	25%	50%	25%
Anglin	Kerryn	33.3%	41.7%	25%	50%	25%
Barton	Ray	33.3%	#	#	#	#
Barton	Ethel	50%	25%	33.3%	25%	16.7%
Barton	Ernie	66.7%	25%	33.3%	25%	16.7%
Barton	Karren	66.7%	16.7%	41.7%	25%	33.3%
Blackeby	Dot	50%	33.3%	33.3%	33.3%	16.7%
Blackeby	Helen	33.3%	16.7%	41.7%	33.3%	33.3%
Blackeby	Heather	16.7%	16.7%	41.7%	33.3%	33.3%
Blackeby	Frank	16.7%	16.7%	41.7%	33.3%	33.3%

### Block Attendance Total

The Block Attendance Total report 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, the Total 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.

The screenshot shows a 'Report Setup' dialog box with the following fields and options:

- Roll Project:** Main Roll 1 (dropdown menu)
- Search from:** 25/12/2016 (dropdown menu)
- Look back:** 20 Records (input field)
- Attendance to Analyse:** A list box containing three items: Morning am1 (checked), Morning am2 (checked and highlighted), and Evening (checked).
- Record amount to analyse in each block?:** 4 Records (input field)
- Buttons:** Help (with a question mark icon), Cancel (with a blue arrow icon), and Continue (with a yellow arrow icon).

### 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

**Sample Report**

Shown below is a sample block analysis report.

<b>Block Report - Attendance Total</b>		Analysis between 24/12/2017 and 09/01/2016 in 10 record Blocks, Project: Main Roll 1				
# = No data available		24/12/2017	23/10/2016	14/08/2016	05/06/2016	27/03/2016
		To 06/11/2016	To 21/08/2016	To 12/06/2016	To 03/04/2016	To 09/01/2016
Allwright	Stephen	#	#	#	#	#
Allwright	Marion	10	12	10	13	10
Angel	Peter	10	11	10	11	11
Angel	Belinda	#	#	#	#	#
Angel	Helen	10	11	10	12	13
Anglin	Brent	7	11	10	10	10
Anglin	Katey	8	11	10	12	11
Anglin	Mathew	8	11	10	10	12
Anglin	Levi	8	11	10	10	10
Anglin	Kerryn	8	11	10	10	10
Barton	Ray	1	#	#	#	#
Barton	Ethel	8	7	11	9	12
Barton	Ernie	9	7	11	9	12
Barton	Karren	8	10	13	8	14
Blackeby	Dot	9		7	5	12

**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.

**Calendar Year**

Select a Calendar Year to get all notes from the selected Roll Project.

**Financial Year**

**Notes Attached to Records**

Roll Project: Main Roll 1 ▼

Calendar Year: 2015 ▼

Financial Year

Date Range: 24/10/2016 ▼ To 24/10/2016 ▼

Help ?
Cancel ↶
Continue →

Select a Financial Year to get all notes from the selected Roll Project

### Date Range

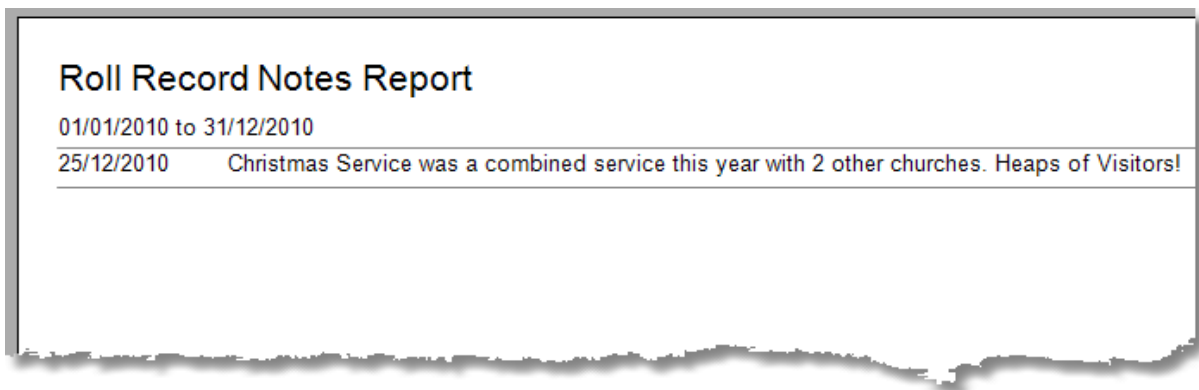
Use a manual date range to search for Roll Notes

### 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.

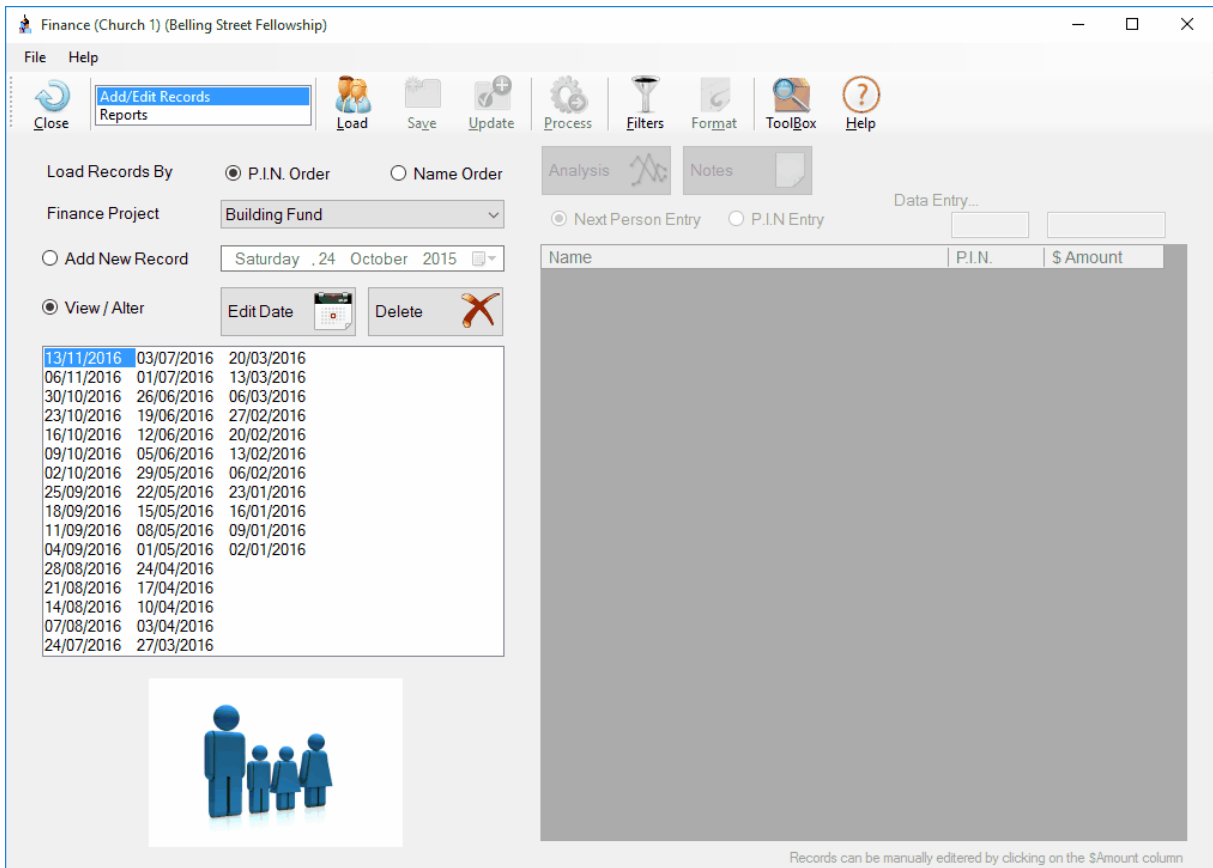
## Financial Records Main Screen

The Financial Records area is designed to the recording of specific donations to specific projects. You do not have to use this feature if you are not recording names of people against donations to specific projects. If you want to print out receipts for tax purposes to people who have donated to tax relevant projects, then this area is perfect for that task.



Click on each area of interest to find out more.

**NOTE:** Some areas shown below appear disabled. This is because not all features are always available depending on the current task at hand. You can still click on each part of this screen to show you more information on that area,



**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.



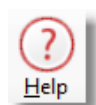
Save the current Financial Records data entry process, and close off this record. (IE: Finalise this record)



Open the standard Pastoral Care [Toolbox](#)

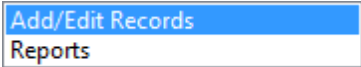


Save the current Financial Records data entry process, but leave it open for continued data entry.



Access the Pastoral Care Help system.

## Menu List

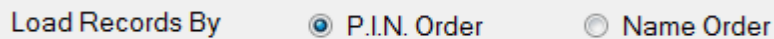


A screenshot of a menu list. The first item, 'Add/Edit Records', is highlighted with a blue background. The second item, 'Reports', is in a white box with a grey border.

Select to either Add / Edit Financial Records, or run Reports on the Financial Records Area.

See [Adding Records](#), [Editing Records](#) and [Reports](#)

## Load Records By



A screenshot of a control panel for 'Load Records By'. It features two radio buttons. The first, 'P.I.N. Order', is selected and has a blue dot. The second, 'Name Order', is unselected and has a grey dot.

Choose the order to list people in the data entry area.

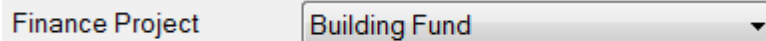
## Pin Order Load

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

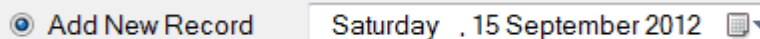
## Select Project



A screenshot of a 'Select Project' dropdown menu. The text 'Finance Project' is on the left, and a dropdown arrow on the right shows 'Building Fund' as the selected option.

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.

## Add New Record

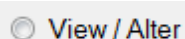


A screenshot of the 'Add New Record' section. It features a radio button that is selected and a date selector showing 'Saturday, 15 September 2012' with a calendar icon.

Choose this option and select a date for adding a new record to the selected Financial Project.

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

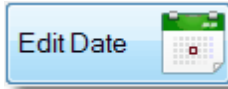


A screenshot of a radio button option labeled 'View / Alter'.

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.

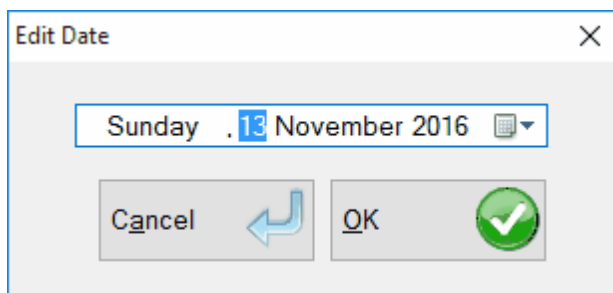
See also [Date List](#)

### 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.

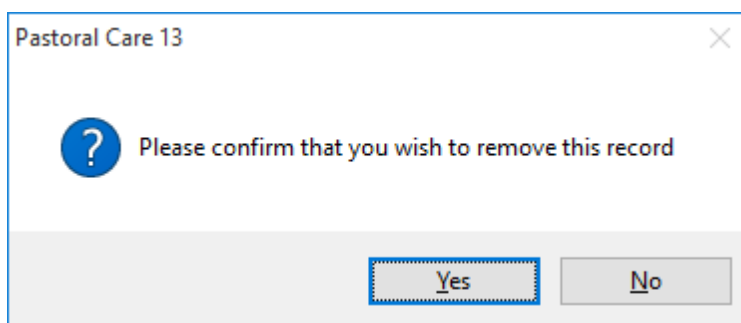


### Delete



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.

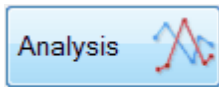
See [Setup - Global / General Options](#) for options on disabling the display of Portraits in Pastoral Care.

### Date List

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	

Select a date to either load (by pressing the Load Button) or Modify a date or delete a date.

### 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.



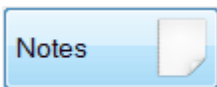
## Individual Finance Analysis

### Blackeby Dot

Start Date	14/08/2010
End Date	06/11/2010
Number of Records	13
Total Amount Received	\$903.00
Average Amount	\$69.46
Lowest Non Zero Amount Received	\$22.00
Highest Amount Received	\$233.00

06/11/2010	\$22.00
30/10/2010	\$22.00
23/10/2010	\$233.00
16/10/2010	\$22.00
09/10/2010	\$23.00
02/10/2010	\$223.00
25/09/2010	\$22.00
18/09/2010	\$23.00
11/09/2010	\$22.00
04/09/2010	\$23.00
28/08/2010	\$23.00
21/08/2010	\$223.00
14/08/2010	\$22.00

### 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
  P.I.N Entry

### 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.

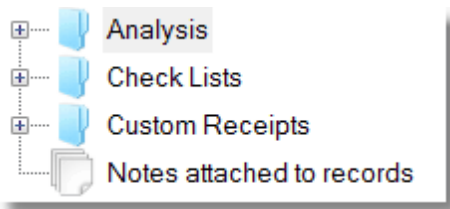
## Reports

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.

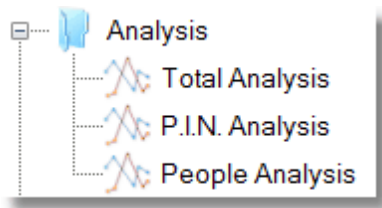


## Analysis

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

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.

**Calendar Year**

Choose a Calendar Year to report on.

**Financial Year**

Choose a standard Financial Year to report on.

**Report Setup**

Finance Project Building Fund ▼

Calendar Year 2015 ▼

Financial Year

Date Range 13/11/2016 ▼ To 13/11/2016 ▼

Exclude people with zero values

Help ?
Cancel ↶
Continue →

## 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.

## 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.

### Calendar Year

Choose a Calendar 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.

**Report Setup**

Finance Project Building Fund ▼

Calendar Year 2015 ▼

Financial Year

Date Range 13/11/2016 ▼ To 13/11/2016 ▼

Exclude people with zero values

Help ?
Cancel ↩
Continue ➔

### 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	Loma	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

[Financial Records](#) [Reports](#)

### 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.

### Calendar Year

Choose a Calendar Year to report on.


### Financial Year

Choose a standard Financial Year to report on.






Custom Receipt Setup

Finance Project **Building Fund**

Calendar Year 2016  
 Financial Year  
 Date Range 13/11/2016 To 13/11/2016

Load   Exclude people with zero values

<input checked="" type="checkbox"/>	Allwright Stephen \$10.00
<input checked="" type="checkbox"/>	Allwright Marion \$30.00
<input checked="" type="checkbox"/>	Angel Peter \$2,507.00
<input checked="" type="checkbox"/>	Anglin Brent \$4,484.78
<input checked="" type="checkbox"/>	Blackeby Dot \$6,923.73
<input checked="" type="checkbox"/>	Brown Peter \$9,051.62
<input checked="" type="checkbox"/>	Dimsey Richard \$12,775.62
<input checked="" type="checkbox"/>	Dobber Hugo \$15,252.62
<input checked="" type="checkbox"/>	Eadon Jack \$18,219.62
<input checked="" type="checkbox"/>	Flemming John \$18,822.62
<input checked="" type="checkbox"/>	French Harry \$19,438.62
<input checked="" type="checkbox"/>	Gordan Frank \$21,705.62
<input checked="" type="checkbox"/>	Gordan Lorna \$21,705.62
<input checked="" type="checkbox"/>	Gray Peter \$24,307.52
<input checked="" type="checkbox"/>	Iles Bill \$24,765.52
<input checked="" type="checkbox"/>	Jones Charlie \$25,322.52
<input checked="" type="checkbox"/>	Kean Steve \$26,090.52
<input checked="" type="checkbox"/>	Knight Mike \$26,125.52
<input checked="" type="checkbox"/>	Leah Adam \$26,270.52
<input checked="" type="checkbox"/>	Lynch Allan \$26,471.52
<input checked="" type="checkbox"/>	McCoy Darryl \$26,639.52
<input checked="" type="checkbox"/>	Morton Peter \$26,717.52
<input checked="" type="checkbox"/>	Nixon Greg \$26,783.52
<input checked="" type="checkbox"/>	Oliver Bruce \$26,817.52
<input checked="" type="checkbox"/>	Potter Milton \$27,084.52

Tag All   
 Untag All   
 Help   
 Cancel   
 Continue 

### 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.

**Sample Receipt Report****Pastoral Care Training Church**

Received From: <b>Dimsey</b> Richard	Receipt Date Range
7 Woods St	01/01/2010
Melton 3091 VIC	31/12/2010
	Amount <b>\$12,775.62</b>

**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.

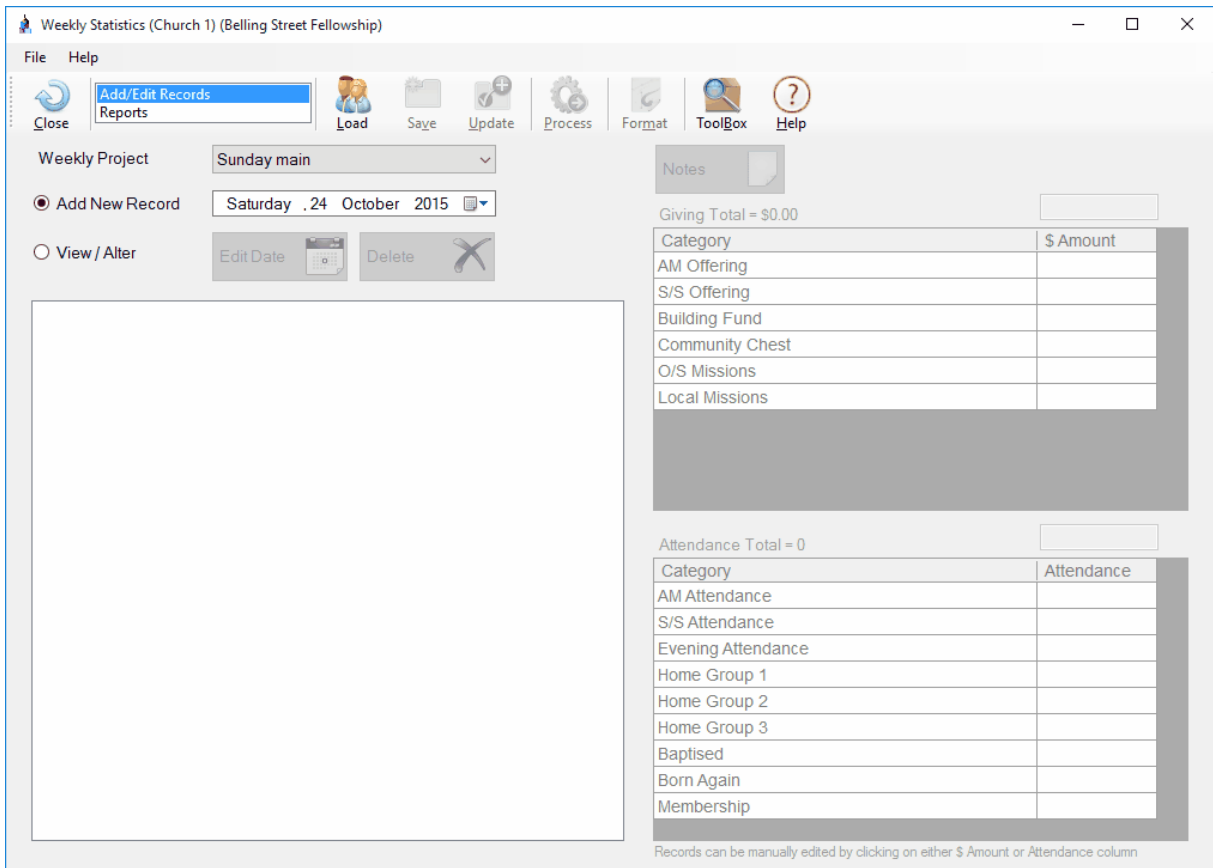
### Weekly Statistics Main Screen

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



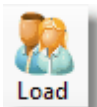
Click on the different elements of the Weekly Statistics window below to learn more about each of these features. Please note: Some items shown below are disabled. Not all features are available in all circumstances.

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.



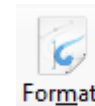
Press the Load Button to start entering a new Weekly Statistics record against the selected Date and Weekly Project



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

Weekly Project      Sunday main

Select the Weekly Project that you want to either Add a record on, or Alter a record.

## Add New Record

Add New Record      Sunday . 16 September 2012

Choose this option to create a new Weekly Statistics record to record attendance and finance against.

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

View / Alter

Choose this option to reveal a [Record List](#) of dates you can select from for Viewing and or Altering the information in.

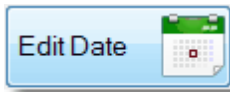
## Record List

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

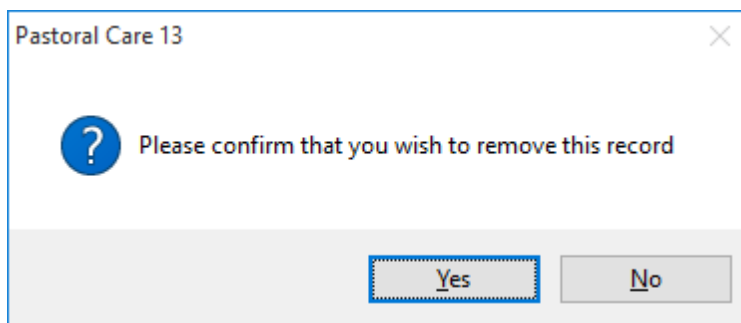


Press this button to allow you to change a date already recorded to another date. This is ideal if you have accidentally saved a Weekly Record on the wrong date.

### 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

Financial Giving Total = \$0.00	
Category	\$ Amount
AM Offering	
S/S Offering	
Building Fund	
Community Chest	
O/S Missions	
Local Missions	

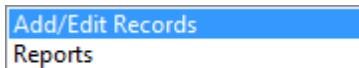
Enter the Financial Data in this area. The box you do the entry in is highlighted with the mouse pointer in the picture below.

### Attendance Data Entry

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	

Enter the Attendance Data in this area. The box you do the entry in is highlighted with the mouse pointer in the picture below.

### 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.

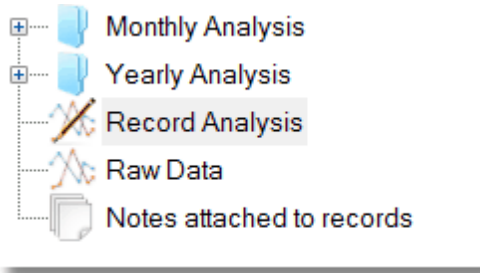
1. Choose Weekly Statistics from the Church Tab on the main menu
2. Select the Weekly Project to record statistics against
3. Select Add New Record and change the date to the date of the event you are recording for
4. Press Load on the tool bar
5. Complete the Financial Statistics and Attendance Statistics
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.

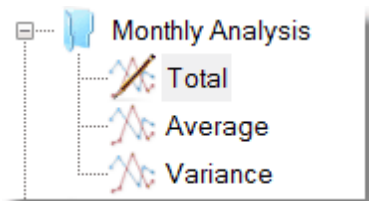


## Monthly Analysis

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

Calender Year

Financial Year

Date Range  To

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"/>

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 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

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)

Calendar Year

Selected Date Range.

Note the Date Range will only allow you to select dates that already exist for the selected project.

**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.

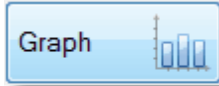
**Attendance Category**

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 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

Analysis Period  To

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"/>

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 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

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	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.

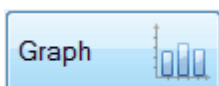
See also [Setup Roll - Finance - Weekly Project](#) for information on setting up Giving Categories for Weekly Statistics Projects.

**Attendance Category**

Attendance Category	Analise	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 them by the total amount of records for that year. The overall averages are calculated by 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	388	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. Since then, we have grown and expanded this feature to make Rostering as painless as possible for you and your management team. Now with our additional Cloud product (purchased separately) you can even manage your rosters from home!

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 maximize 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

If you are using an earlier version of Pastoral care, 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, and some new things along the way!

### 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.

### The Roster Toolbar

Shown below is the Roster Toolbar. You can click on each part of this toolbar to jump to different sections of the Roster Program.

If you are new to rosters, the best way to start learning about rosters is to start with [4 Steps to Create a Roster](#)



Click on the different toolbar items to learn more...



### History



Press the History Button on the Roster window to see what rosters have been sent. You can select a roster and reprint it using this window. The Last 5 rosters that are printed or emailed are automatically saved.

To remove a saved roster, select it and press Remove on this window.

**Roster History** X

**Rosters Sent to Printer**

02/11/2015 02:58 PM

**Rosters Sent via Email**

02/11/2015 02:59 PM

The Last 5 Rosters that where Printed or Emailed are Archived here

Help ? Remove X Close

---

**Roster Report**

Enter a Title for the Roster Report here

Date \ Duty	Car Park	Door Duty	Overhead	Music Team	Piano
07/11/2016 9:30am Traditional		Sophie Read 041234567890 Ruth Chapman 041234567890	Ernie Barton 041234567890	Heather Blackeby 041234567890 Frank Blackeby 041234567890 Sophie Read 041234567890	Heather Blackeby 041234567890
07/11/2016 11:00am Family	David Edwards 041234567890 Helen Edwards 041234567890	Lauren Jones 041234567890 Jill Jones 041234567890 Ryan Jones 041234567890	Esther Nixon 041234567890	Ruth Taylor 041234567890 Andrew Read 041234567890 Anna Read 041234567890 Alison Read 041234567890	Karren Potter 041234567890
07/11/2016 7:00pm Evening		Sophie Read 041234567890 Ruth Chapman 041234567890	Michaela Knight 041234567890	Wendy Potter 041234567890 Nathan Potter 041234567890 Ruth Taylor 041234567890	Helen Edwards 041234567890
14/11/2016 9:30am Traditional		Stephen Allwright 041234567890 Marion Allwright 041234567890	Karren Barton 041234567890	Ernie Barton 041234567890 Levi Anglin 041234567890 Marion Allwright 041234567890	Heather Brown 041234567890
14/11/2016 11:00am Family	Stephen Allwright 041234567890 Peter Angel 041234567890	Nathan Kean 041234567890 Jannet Kean 041234567890 Mike Knight 041234567890	Greg Nixon 041234567890	Milton Potter 041234567890 Bruce Oliver 041234567890 Peter Morton 041234567890 Sophie Read 041234567890	Peter Angel 041234567890
14/11/2016 7:00pm Evening		Adrien Chapman 041234567890 John Brown 041234567890	Sue Knight 041234567890	Bradd Taylor 041234567890 Sophie Read 041234567890 Andrew Read 041234567890	John Flemming 041234567890
21/11/2016 9:30am Traditional		Peter Angel 041234567890 Belinda Angel 041234567890	Dot Blackeby 041234567890	Stephen Allwright 041234567890 Peter Angel 041234567890 Helen Angel 054-22-1199	Frank Blackeby 041234567890
21/11/2016 11:00am Family	Helen Angel 054-22-1199 Mathew Anglin 041234567890	Julie Flemming 041234567890 Sue Knight 041234567890	Karren Potter 041234567890	Esther Nixon 041234567890 Christine Morton 041234567890	Belinda Angel 041234567890

### Load



Pressing Load will load in the selected Roster Event for editing and reporting on.



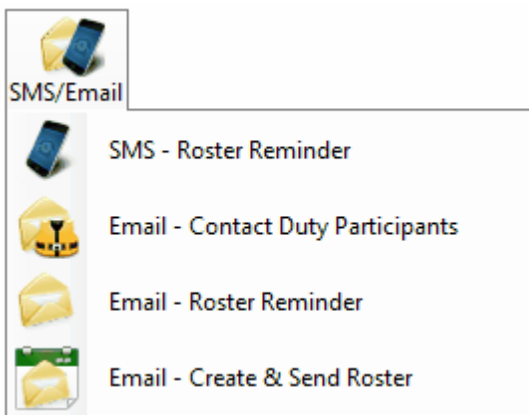
## SMS / EMAIL



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!



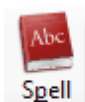
Click on each part of the SMS reminder window below to learn more about this feature.

**Roster SMS Toolbar**

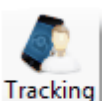
Shown below are the icons on the Roster SMS Toolbar, along with descriptions of each function.



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.



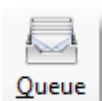
Access the Spell Checker Settings



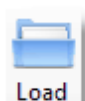
Turn on SMS Tracking for the message you are about to send. See [Tracking](#) for more information



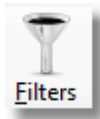
Save the currently composed SMS message as a template for re-use.



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.

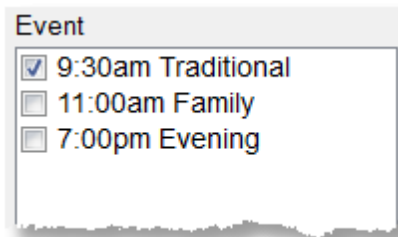


Use [Filters](#) to narrow down even further the list of people you want to send an SMS reminder to.

### Select Event

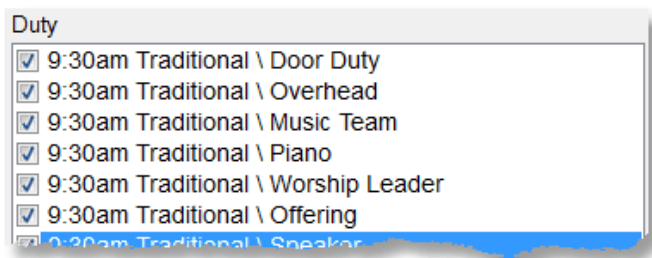
To select people to receive an SMS reminder regarding a Rostered Duty, you must first select the Event(s) that you want to send reminders out to.

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.



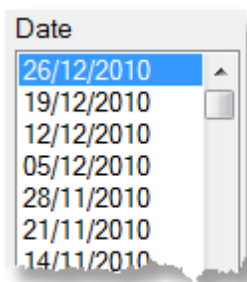
### Tag / Untag All

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.

Smsglobal Status  
Connection Established

### 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.

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

26/12/2016

Mobile to send Reminder to...  
041234567890 (Personal Mobile)

Alternate Mobile available on family file

Phone Number	Type	Owner	Hidden
054-33-5478	Family Phone	Family Phone	No
041234567890	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

Est. Characters: 139      Est Txt 1      Estimate Cost \$2.72

Hi [Given], you are rostered on for [Roster\_Event\_Duty] on the [Roster\_Date]. Please contact team leader if unable to make this commitment.

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.

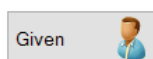
The sample message above includes a field for the Given Name and Roster Details in the message.

It would read like the following:

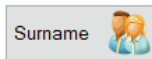
Hi Milton, you are rostered on for 7:00pm Evening\Overhead; 9:30am Traditional\Speaker on the 26/12/2019. Please team leader if unable to make this commitment.

### Insert Fields

The following fields are available for inserting into a SMS Roster Reminder.

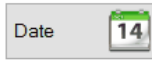


Insert a person's Given Name, or their preferred name if one exists in their family file.



Surname

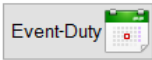
Insert a person's Family Surname, or Individual Surname if one exists in their family file



Date

14

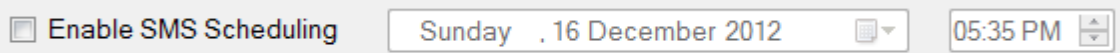
Insert the date of the Roster Event



Event-Duty

Insert the Event Title and Duty Title for each event / duty the individual is rostered on for the selected date.

### 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.

### Email - Contact Duty Participants

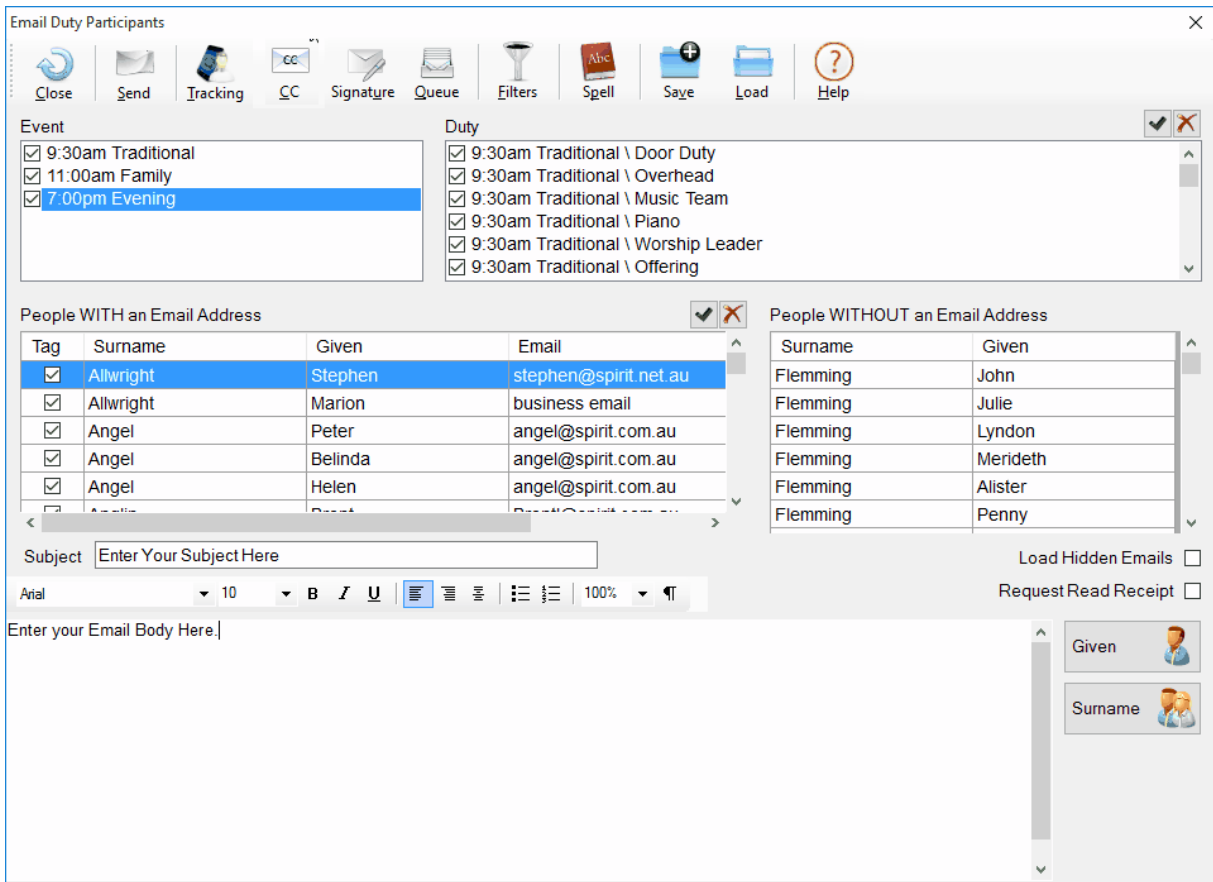
This feature is similar to [Send Email Roster Reminder](#) however this is more designed for sending a general email to all people on a selected duty / duties.

The main difference is this is NOT date sensitive. It will email people who are selected for a duty at an event regardless of any date.

This is useful for emailing general information to your team etc.



Click on each part of the Email Contact Duty Participants window below to learn more about this feature.

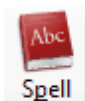


**Email Duty Participants Toolbar**

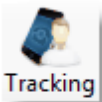
Shown below are the icons on the Roster SMS Toolbar, along with descriptions of each function.



Send your message to all selected people. You can choose to send all messages to the [Email Queue](#) and dispatch immediately, or you can Send to the [Email Queue](#) for dispatch later.



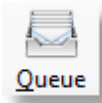
Access the Spell Checker Settings



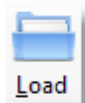
Turn on Email Tracking for the message you are about to send. See [Tracking](#) for more information



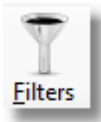
Save the currently composed Email message as a template for re-use.



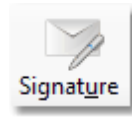
See the [topic](#) for full details on how the [Email Queue](#) manages the sending of Email messages.



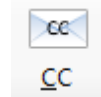
Load a previously saved Email message template for re-use.



Use [Filters](#) to narrow down even further the list of people you want to send an SMS reminder to.



Insert an Email Signature. See the [Email Signature Designer](#) for information on how to create signatures for use in Emails



Add a CC (Carbon Copy) to the email. See [CC](#) for more information.

### Event

Select the Event(s) that you want to email people from.

**Event**

9:30am Traditional

11:00am Family

7:00pm Evening

### Duty

Select the Duty(s) that you want to email people from.

**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

### Tag / UnTag All



Press the Green tick icon to select all duties



Press the red Cross Icon to de-select all duties



### People With Email

This list shows all people found for the selected Event / Duty(s) that have an email address.

Tag	Surname	Given	Email
<input checked="" type="checkbox"/>	Allwright	Stephen	stephen
<input checked="" type="checkbox"/>	Allwright	Marion	busines
<input checked="" type="checkbox"/>	Angel	Peter	angel@
<input checked="" type="checkbox"/>	Angel	Belinda	angel@
<input checked="" type="checkbox"/>	Angel	Helen	angel@

### Tag / UnTag All

Press the Green tick icon to select all people with an email

Press the red Cross Icon to de-select all people with an email

### People Without Email

This list shows all people that you want to email but that do not have an email address.

People WITHOUT an Email Address	
Surname	Given
Read	Sophie

### Load Hidden Emails

Load Hidden Emails

Tick this option to load in peoples emails that are ticked as HIDDEN in their family file.

### Request Read Receipt

Request Read Receipt

Tick this option to set a read receipt to be sent back the sender of the email.

### Subject

Enter the Subject Line of your email.

### Formatting



Use any of the standard formatting tools to set Font and alignment options for the selected text.

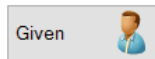
## Compose

Use the compose space to type in your email. This email can contain text as well as Given Name and Surname fields for personalising the message.

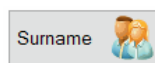
Use the Signature button on the [Toolbar](#) to add an email signature to this email.

## 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

## 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.

The screenshot shows the 'Email Reminder' window with the following sections:

- Toolbar:** Close, Send, Tracking, CC, Signature, Queue, Filters, Spell, Save, Load, Test, Help.
- Event Selection:**
  - 9:30am Traditional
  - 11:00am Family
  - 7:00pm Evening
- Duty Selection:**
  - 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 Grid:**

26/12/2016	21/11/2016	17/10/2016	12/09/2016	08/08/2016
19/12/2016	14/11/2016	10/10/2016	05/09/2016	01/08/2016
12/12/2016	07/11/2016	03/10/2016	29/08/2016	25/07/2016
05/12/2016	31/10/2016	26/09/2016	22/08/2016	18/07/2016
28/11/2016	24/10/2016	19/09/2016	15/08/2016	11/07/2016
- Rostered On WITH an Email Address:**

Tag	Surname	Given	Email
<input checked="" type="checkbox"/>	Allwright	Stephen	stephen@spirit.net.au
<input checked="" type="checkbox"/>	Allwright	Marion	business email
<input checked="" type="checkbox"/>	Anglin	Levi	Brentl@spirit.com.au
<input checked="" type="checkbox"/>	Blackeby	Helen	ernie@spirit.com.au
<input checked="" type="checkbox"/>	Chapman	Ruth	adrien@spirit.com.au
- Rostered On WITHOUT an Email Address:**

Surname	Given
Harris	Annita
Lynch	Christopher
Oliver	Fran
Read	Sophie
- Subject:** Enter your Subject line here
- Formatting:** Arial, 10, Bold, Italic, Underline, Bulleted List, Numbered List, Indent, 100%, Left Align.
- Body:** Enter the body of the email here. You can use Fields for inserting name, date and event/duty information in the email >>>
- Field Selection:**
  - Given
  - Surname
  - Date (14)
  - Event-Duty

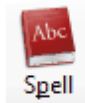
## Roster Email Toolbar

Shown below are the icons on the Roster Email Toolbar, along with descriptions of each function.



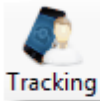
Send

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.



Spell

Access the Spell Checker Settings



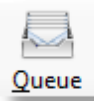
Tracking

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.



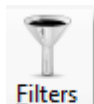
Queue

See the [Email Queue](#) topic for full details on how the Email queue manages the sending of Email messages.



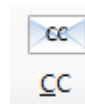
Load

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.



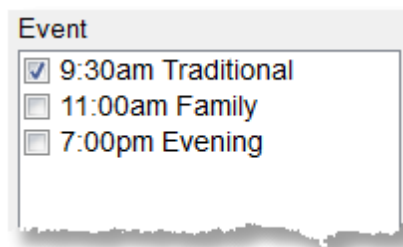
CC

Add a CC (Carbon Copy) to the email. See [CC](#) for more information.

## Select Event

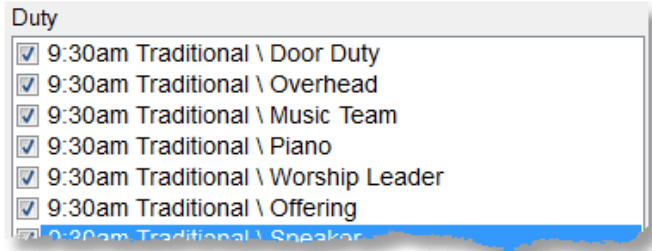
To select people to receive an Email reminder regarding a commitment for a Rostered Duty, you must first select the Event(s) that you want to send reminders out to.

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.



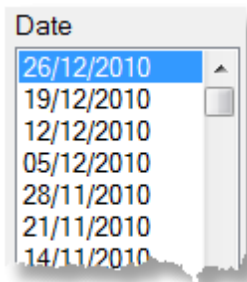
### Tag / Untag All

 Press the Green tick icon to select all duties

 Press the red Cross Icon to de-select all duties

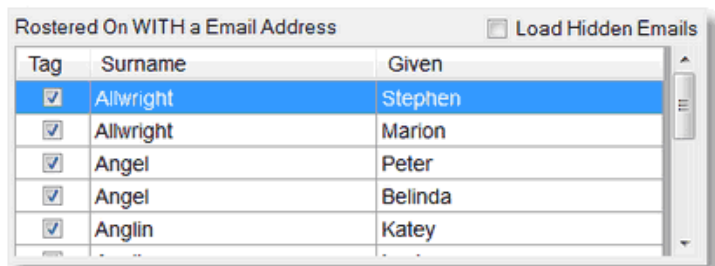
### Select Date

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.



If you Double Click on a persons name, you have the ability to change the email address for that person.

### Tag All

 Press the Green tick icon to select all people to receive an email message reminder

## Un Tag All



Press the red Cross Icon to de-select all people in the email 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

03/10/2016  
03/10/2016

Email Address to send Reminder to...  
stephen@spirit.net.au (Personal Email)

Alternate Email address available on family file

Email Address	Type	Owner	Hidden
stephen@spirit.net.au	Personal Email	Stephen	No
business email	Business Email	Marion	No

Help ? Replace  Close

## People without emails

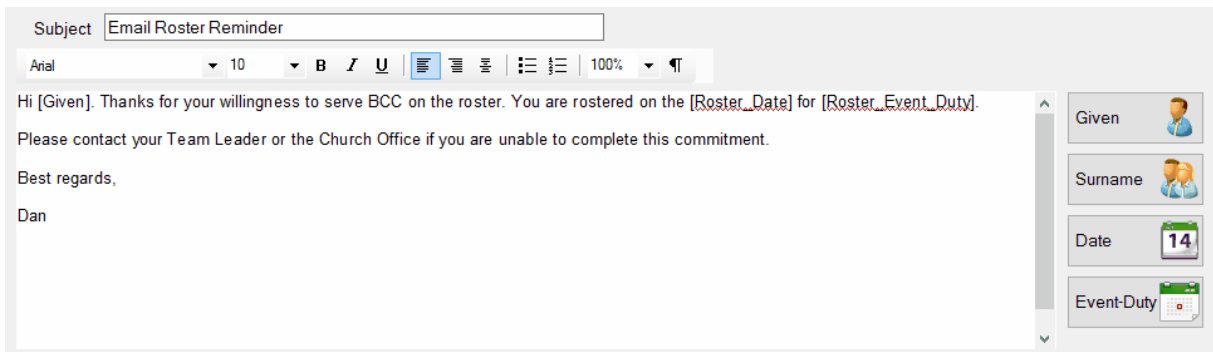
This list shows people who are rostered on with the selections you have made, but they do not have an email address.

Surname	Given
Graham	Joel
Jones	Wendy
Jones	Ryan
Jones	Jill
Kean	Steve

## Compose Email Message

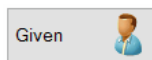
Type your reminder message in the supplied space. Remember to try and make your message both short and encouraging. You can personalise the message by inserting fields into the message. See [Insert Fields](#) for more information on this.

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.

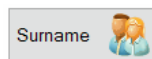


### Insert Fields

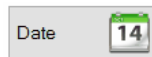
The following fields are available for inserting into an Email Roster Reminder.



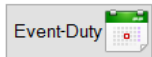
Insert a person's Given Name, or their preferred name if one exists in their family file.



Insert a person's Family Surname, or Individual Surname if one exists in their family file



Insert the **Date** that the individual is rostered on.



Insert the Event Title and Duty Title for each event / duty the individual is rostered on for the selected date.

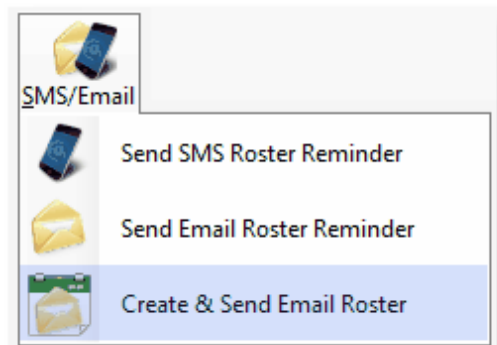
### Create & Send Email Roster

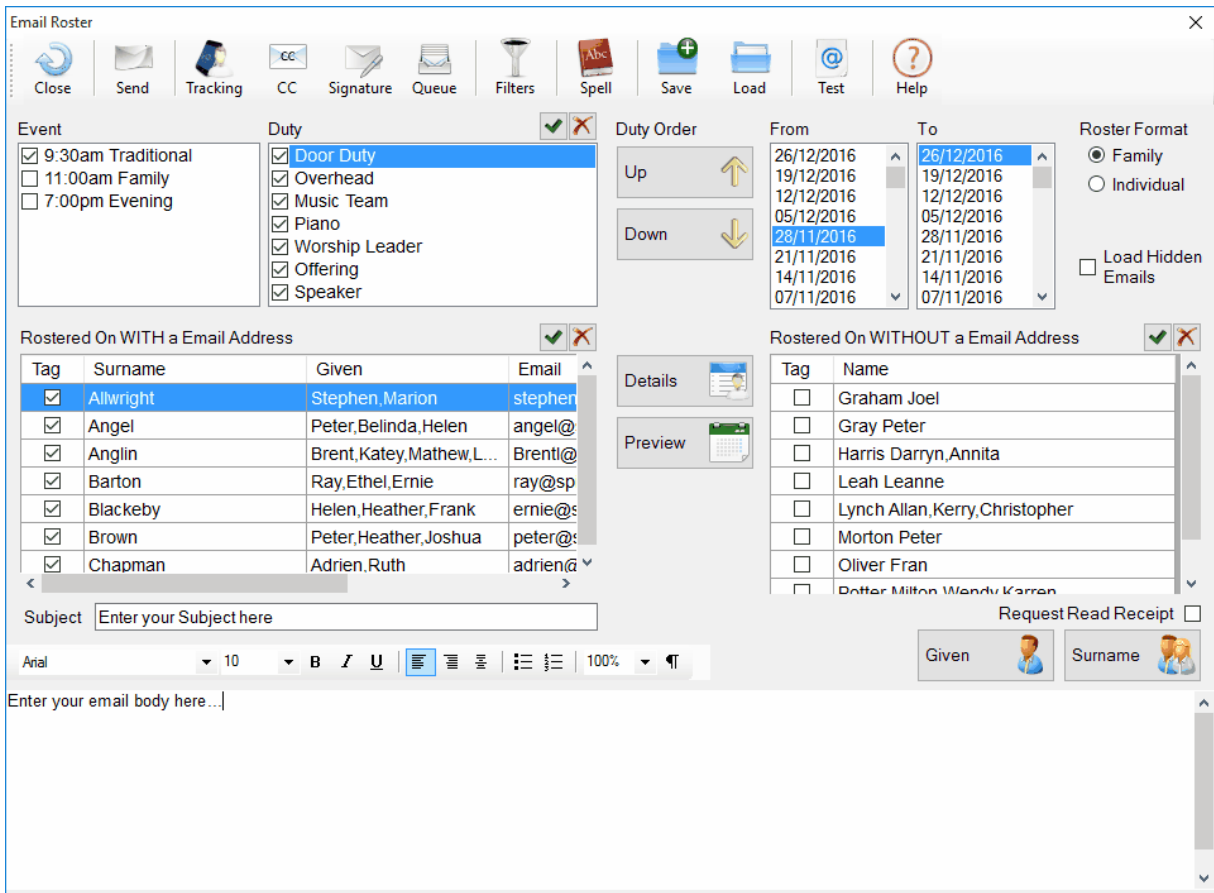
As well as having individual reminders able to go out to people for a specific date, this feature allows you to publish to PDF a Personalised Roster for each person on a roster, and email them a calendar with their days and commitments highlighted.

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.





**Create and Send Toolbar**



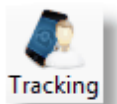
Send your personalised Roster to all selected people. You can choose to send all to the [Email Queue](#) and dispatch immediately, or you can Send to the [Email Queue](#) for dispatch later.

See [Send Options](#) for more details on sending options



Insert an Email Signature.

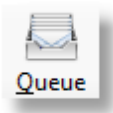
See the [Email Signature Designer](#) for information on how to create signatures for use in Emails



Turn on Email Tracking for the message you are about to send. See [Tracking Email](#) for more information



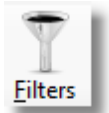
Save the currently composed Email message as a template for re-use. This is ideal if you batch different areas of church together for different rosters. For Example, a Roster for Sunday School, Worship Team, Scouts, Back of House, Front of House etc



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.



Send a test email and sample personalised Roster Attachment for trying out your email.

## Send Options

Just before emails are created and sent, the following OPTIONS window is opened letting you customise the attached roster report before it is processed and sent.



Click on the different parts of this graphic below to learn more...

**Pre Roster Create Options**

<p><b>Row / Column</b></p> <p><input checked="" type="radio"/> Dates / Duty</p> <p><input type="radio"/> Duty / Dates</p> <p><b>Duty Focus</b></p> <p><input checked="" type="radio"/> All Selected Duties</p> <p><input type="radio"/> Only Duties Rostered On</p> <p><b>Event Display</b></p> <p><input type="radio"/> All Selected Events</p> <p><input checked="" type="radio"/> Only Events Rostered On</p> <p><b>People to Include</b></p> <p><input checked="" type="radio"/> All Rostered On</p> <p><input type="radio"/> Only Tagged</p> <p><input type="checkbox"/> Include Church Roster with Personal Roster</p>	<p>Team Setup </p> <p>Roster Design </p> <p>Contact Setup </p> <p>Title </p> <p style="border: 2px solid #add8e6; padding: 2px;">Help </p> <p>Cancel </p> <p>Continue </p>
--	--

## Row Column

Row / Column

Dates / Duty

Duty / Dates

Select Dates across the top with Duties down the side, or Duties across the top with Dates down the side.



### Duty Focus

Duty Focus

All Selected Duties

Only Duties Rostered On

Select what duties will be in the roster report.

### Event Display

Event Display

All Selected Events

Only Events Rostered On

Choose to show all selected events, or only those events that person receiving the roster report is rostered on for.

### People To Include

People to Include

All Rostered On

Only Tagged

Choose to include on the roster report All Rostered people, or only those people you have tagged for the report.

### Include Church Roster

Include Church Roster with Personal Roster


Tick this option to include in the email the Church Complete Roster report as well as the individuals roster report.

### Title


Enter a title for the Roster Report.

Title to add to Roster ✕

Current Title

Close 

### Continue

Continue 

Press Continue to proceed with emailing the roster to selected people.

**Sample Personalised Roster**

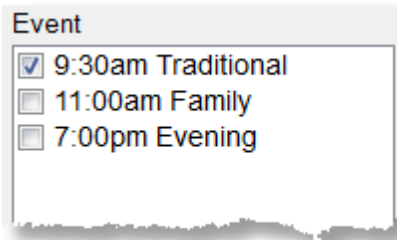
Shown below is a sample personalised roster for Stephen Allwright. His commitments have been automatically highlighted in blue. The highlight can be changed to any colour you like!

Date \ Duty	Car Park	Door Duty	Overhead	Music Team	Piano	Worship Leader	Childrens Address	Offering	Spea
07/11/2016 9:30am Traditional		Sophie Read Ruth Chapman	Ernie Barton	Heather Blackeby Frank Blackeby Sophie Read	Heather Blackeby	James Gordon		Andrew Read Sophie Read	Nath
07/11/2016 11:00am Family	David Edwards Helen Edwards	Lauren Jones Jill Jones Ryan Jones	Esther Nixon	Ruth Taylor Andrew Read Anna Read Alison Read	Karren Potter	Ben Iles	Peter Gray	Mike Knight Sue Knight Jenny Kean	Soph
07/11/2016 7:00pm Evening		Sophie Read Ruth Chapman	Michaela Knight	Wendy Pote Nathan Pote Ruth Taylor	Helen Edwards	Mathew Anglin		Julie Flemming Edith Eadon	Anne
14/11/2016 9:30am Traditional		Stephen Allwright Marion Allwright	Karren Barton	Ernie Barton Levi Anglin Marion Allwright	Heather Brown	Ross Graham		Marion Allwright Stephen Allwright	Aliso
14/11/2016 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	Joel Graham	Jill Jones Steve Kean Esther Nixon	Andr
14/11/2016 7:00pm Evening		Adrien Chapman John Brown	Sue Knight	Bradd Taylor Sophie Read Andrew Read	John Flemming	Levi Anglin		Ben Iles Leanne Iles	Karre
21/11/2016 9:30am Traditional		Peter Angel Belinda Angel	Dot Blackeby	Stephen Allwright Peter Angel Helen Angel	Frank Blackeby	Janis Graham		Peter Angel Marcus Read	Soph
21/11/2016 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	Janis Graham	Bruce Oliver Christine Morton Peter Morton	Marc
21/11/2016 7:00pm Evening		Hannah Chapman Stephen Collins	Rachael Knight	Judy Morton Anna Read Alison Read	Ernie Barton	Merideth Flemming		Peter Iles Charlie Jones	Nath
28/11/2016		Helen Angel	Helen Blackeby	Katey Anglin	Adrien Chapman	Peter Gray		Andrew Read	Fran

**Select Event**

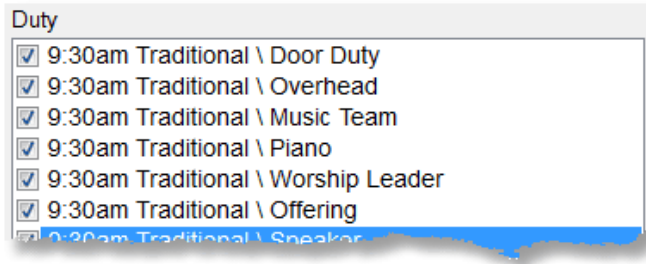
To select people to receive an Email Personalised Roster, you must first select the Event(s) that you want to send Rosters to.

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.



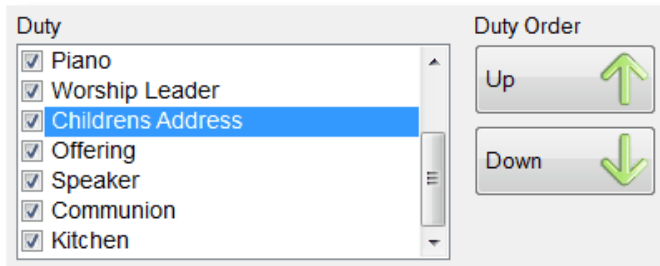
**Select Duties**

Select the duties that you want to send reminders for.



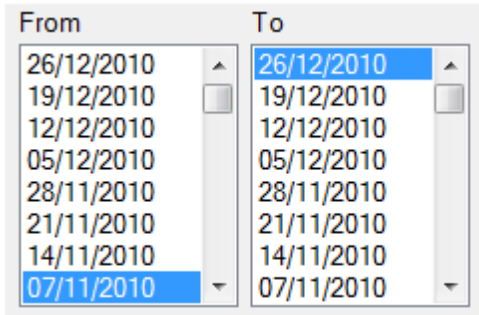
**Duty Order**

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.



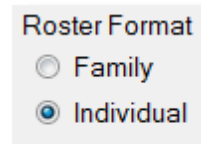
**Date Range**

Select the date range for the Roster Report to be produced for,



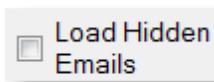
**Roster Format**

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.

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

### Tag / Untag All



Press the Green tick icon to select all items in the list directly below the button



Press the red Cross Icon to de-select all items in the list directly below the button

### 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

03/10/2016  
03/10/2016

Email Address to send Reminder to...

stephen@spirit.net.au (Personal Email)

Alternate Email address available on family file

Email Address	Type	Owner	Hidden
stephen@spirit.net.au	Personal Email	Stephen	No
business email	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.

**Pre Roster Create Options**

<p><b>Row / Column</b></p> <p><input checked="" type="radio"/> Dates / Duty</p> <p><input type="radio"/> Duty / Dates</p> <p><b>Duty Focus</b></p> <p><input checked="" type="radio"/> All Selected Duties</p> <p><input type="radio"/> Only Duties Rostered On</p> <p><b>Event Display</b></p> <p><input type="radio"/> All Selected Events</p> <p><input checked="" type="radio"/> Only Events Rostered On</p> <p><b>People to Include</b></p> <p><input checked="" type="radio"/> All Rostered On</p> <p><input type="radio"/> Only Tagged</p>	<p>Team Setup </p> <p>Roster Design </p> <p>Contact Setup </p> <p>Title </p> <p>Help </p> <p>Cancel </p> <p>Continue </p>
---	---

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

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

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

Press the Title button for setting a Report Title.

Title to add to Roster
✕

Current Title

Close

Use this feature to add Phone Numbers to the roster grid. This will of course take up a bit more room on your roster, but it will assist with people getting in contact with each other if there are any reasons for swapping etc.



Click on each part of the Create and Send Email Roster window shown below for more information.

**Phone Contact Setup**

Enable Phone Contact

**Order to find phone numbers**

- Personal Mobile
- Family Mobile
- Family Phone
- Business Phone

Allow hidden phone numbers

**Contact Location**

Position Beside Name

Position Under Name

Add 'No Phone'  
If a contact does not exist

Enable Phone Contact

Tick this option to include phone contact information for each person on the Roster Report.

- Personal Mobile
- Family Mobile
- Family Phone
- Business Phone

Up

Down

Use the Up and Down buttons to change the Search Priority for Phone Numbers to include on the report. The FIRST phone number found will be used for each person on the report.

Allow hidden phone numbers

tick this option to force Pastoral Care to utilise a Hidden phone number if needed to fill in a phone number contact for a person on the roster.

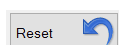
**Contact Location**

Position Beside Name

Position Under Name

Add 'No Phone'  
If a contact does not exist

Select to place the phone number Beside or Under a persons name. You can also tick to include the words "No Phone" if Pastoral Care cannot find a phone number for an individual.



Press Reset to turn off Contact Phone Numbers and change this feature back to default settings.

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 1
<input checked="" type="checkbox"/> 9:30am Traditional \ Door Duty \ Door Team 2
<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

Help ?
Close ↻

Up ↑

Down ↓

Left Aligned

Centre Text

Right Aligned

Members 👤

Tick this option to use a Team name in a roster grid, instead of people's own names.

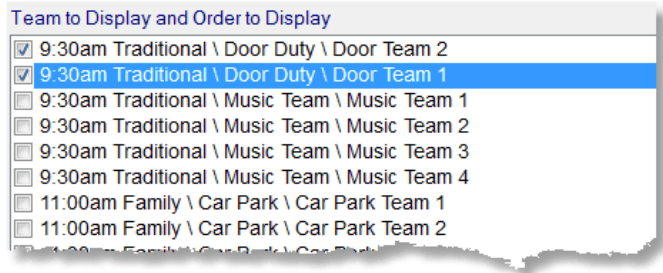
Replace people assigned in Teams with the Team name

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



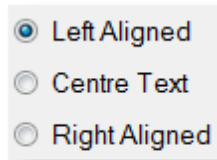
Tick the Teams that you want to include on the roster. Those not ticked will not be printed out or exported to PDF for the roster report.



Use the Sort Buttons to change the order of team based duties displayed on the Roster Grid.



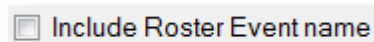
Set the alignment for the text for Team Names displayed / printed on the Roster grid.



Press Members to see a list of the names of people in the currently selected (highlighted) team.



Tick this option to include the Event Name along side the Team/Duty description.



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.

Roster Design

<p><b>Column &amp; Row Titles Font</b></p> <p>Font: <input type="text" value="Arial"/> <input type="text" value="8"/></p> <p><input type="checkbox"/> Bold <input type="checkbox"/> Italic <input type="checkbox"/> Underline</p> <p>Colour: <input type="text" value="Black"/></p> <p><input checked="" type="radio"/> Left <input type="radio"/> Centre <input type="radio"/> Right</p>	<p><b>Roster Grid Font</b></p> <p>Font: <input type="text" value="Arial"/> <input type="text" value="8"/></p> <p><input type="checkbox"/> Bold <input type="checkbox"/> Italic <input type="checkbox"/> Underline</p> <p>Colour: <input type="text" value="Black"/></p> <p><input checked="" type="radio"/> Left <input type="radio"/> Centre <input type="radio"/> Right</p>	<p>Date Format: <input type="text" value="dd/mm/yyyy"/></p> <p>Name Format: <input type="text" value="Given Name, Surname"/></p> <p>Cell Sizing: <input type="text" value="Auto Size Cells"/></p> <p><input type="checkbox"/> Disable Displaying Event in Roster</p> <p><input checked="" type="checkbox"/> Split Duty title over more lines using the % symbol as the divider</p> <p><input type="checkbox"/> Allow Vertical Centering within Grid</p> <p><input checked="" type="checkbox"/> Allow Substitute Text</p> <p><input type="checkbox"/> Darken line between Different Dates</p> <p>Names total per line within cell: <input type="text" value="1"/></p> <p><input checked="" type="checkbox"/> Enable Highlight for Personal Rosters</p> <p><input type="text" value="DarkGray"/></p> <p>Page Layout: <input type="text" value="A4 Landscape"/></p> <p>Left Margin: <input type="text" value="0"/> CM</p>
<p><input type="checkbox"/> Enable Shade Alternate Days</p> <p><input type="text" value="LightGray"/></p> <p><input type="checkbox"/> Enable Event Title Background Shading</p> <p><input type="text" value="LightGray"/></p>	<p><input type="checkbox"/> Enable Grid Background Shading</p> <p><input type="text" value="LightYellow"/></p> <p><input type="checkbox"/> Enable Duty Title Background Shading</p> <p><input type="text" value="LightGray"/></p>	
<p><input type="checkbox"/> Include Message</p> <p><input type="text" value=""/></p> <p><input checked="" type="radio"/> Left <input type="radio"/> Middle <input type="radio"/> Right</p>		
<p>Help ? Reset Close</p>		

Set the font options for the Titles that name each Row and Column.

**Column & Row Titles Font**

Font:

Bold  Italic  Underline

Colour:

Left  Centre  Right

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.

**Roster Grid Font**

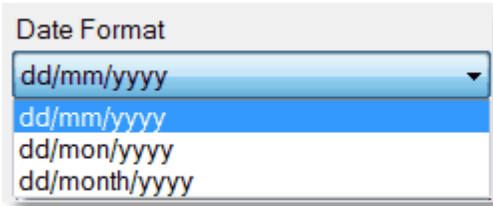
Font:

Bold  Italic  Underline

Colour:

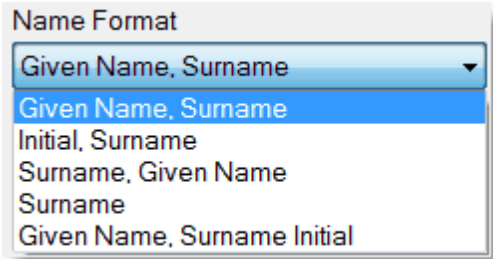
Left  Centre  Right

Choose from 3 different Date Formats for display on a Roster Grid report.



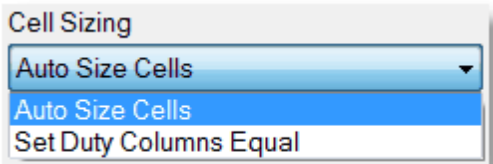
Format	Example
dd/mm/yyyy	14/14/2014
dd-mon-yyyy	14-Dec-2014
dd-month-yyyy	14-December-2014

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.



Disable Displaying Event in Roster

Tick this option to disable the displaying of the Event Title on the Roster Report selected.

Split Duty title over more lines using the % symbol as the divider

The Duty Title if particularly long can be split over 2 lines by using a % symbol. This is initially setup in the Roster Setup area for the Duty Titles.

For example, if you had a Duty called Communion Setup, you could set that up as Communion%Setup and when this option is ticked in the report options, the title will be split over 2 lines to look like:

Communion  
Setup

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 within 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  
  
 Left Margin  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.

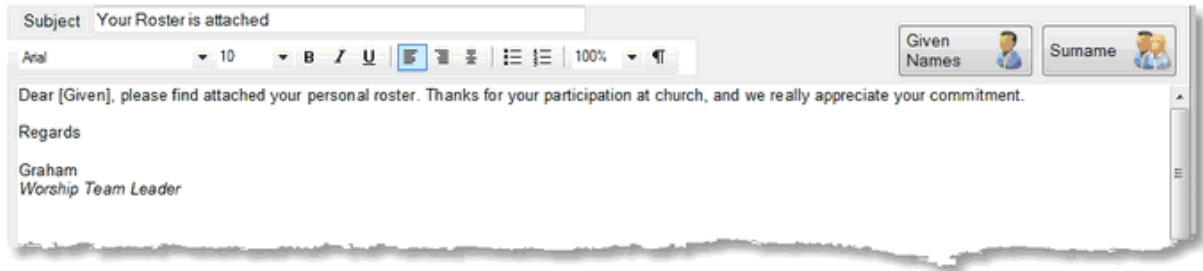
Rostered On WITH a Email Address

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

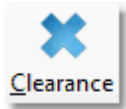
Pastoral Care cannot send these people an email, unless you exit the roster program, and add an email address to them.

## 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.



## Clearance

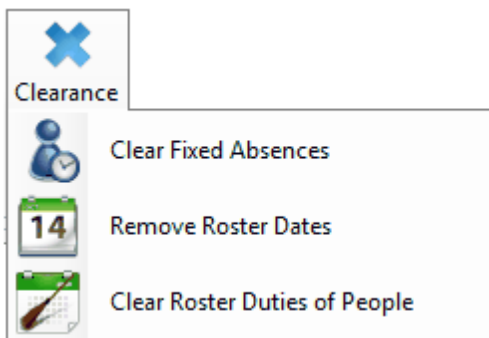


The Clearance Icon on the toolbar brings together 3 different deleting or clearing functions. Each of these functions allows you to remove data from the Roster program.

Removal of data from the Roster program cannot be undone.



Click on each part of the Clearance menu below for more information.

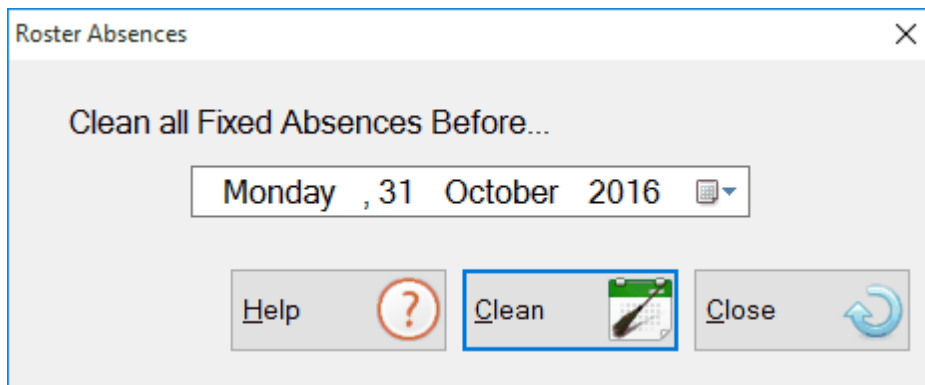


## Clear Fixed Absences

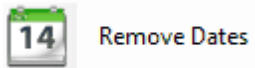
Select a date range here, and press the Clear button to delete all fixed absences before the selected date.

This will not delete any pattern absences, only fixed dates.

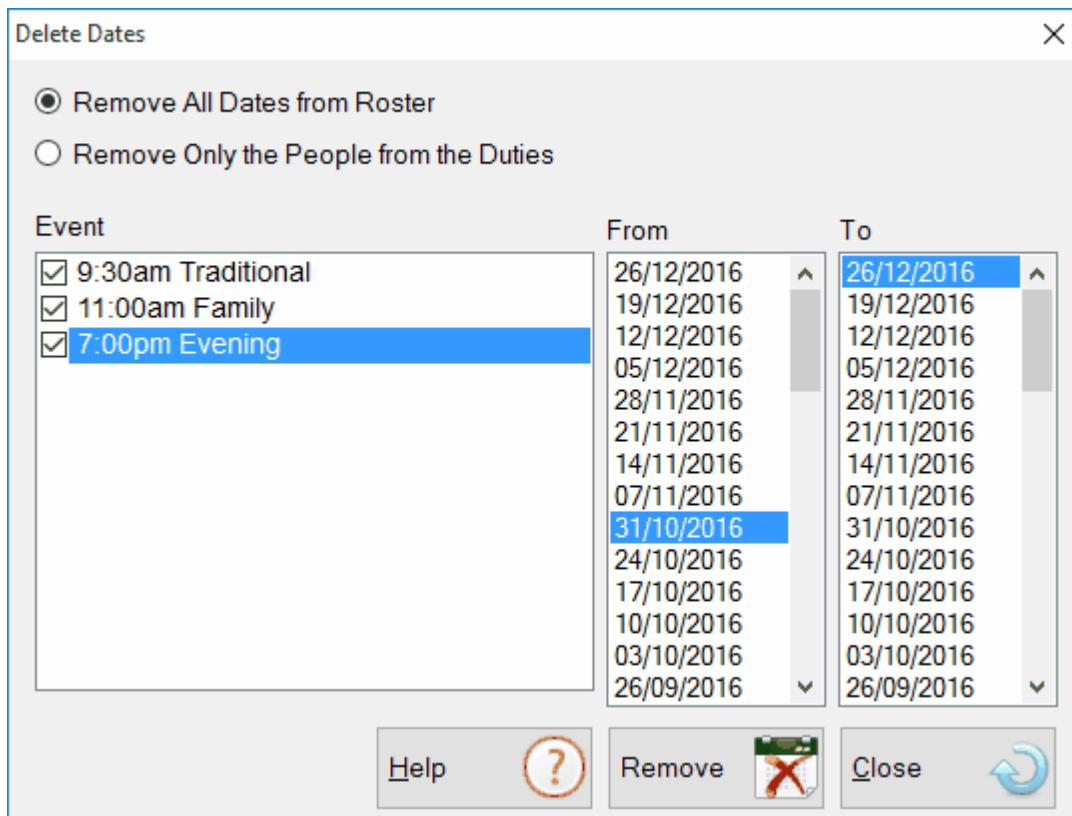
Deleting old dates is a good idea from time to time. This will save a little space in the database, but more importantly will speed up processing in the Auto Build section of the Roster.



## Remove Roster Dates



The remove roster 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.



## Clear Roster Duties of People

Use this window to remove people from Rostered Duties for a selected date range.

Once completed, this action cannot be undone.



Click on each part of the Clearance menu below for more information.

Clear Roster Duties of People

Event	Duty	From	To
<input checked="" type="checkbox"/> 9:30am Traditional	<input type="checkbox"/> Door Duty	26/12/2016	26/12/2016
<input type="checkbox"/> 11:00am Family	<input type="checkbox"/> Overhead	19/12/2016	19/12/2016
<input type="checkbox"/> 7:00pm Evening	<input type="checkbox"/> Music Team	12/12/2016	12/12/2016
	<input type="checkbox"/> Piano	05/12/2016	05/12/2016
	<input type="checkbox"/> Worship Leader	28/11/2016	28/11/2016
	<input type="checkbox"/> Offering	21/11/2016	21/11/2016
	<input type="checkbox"/> Speaker	14/11/2016	14/11/2016
		07/11/2016	07/11/2016
		31/10/2016	31/10/2016
		24/10/2016	24/10/2016
		17/10/2016	17/10/2016
		10/10/2016	10/10/2016
		03/10/2016	03/10/2016
		26/09/2016	26/09/2016
		19/09/2016	19/09/2016
		12/09/2016	12/09/2016
		05/09/2016	05/09/2016
		29/08/2016	29/08/2016
		22/08/2016	22/08/2016

Buttons: Help, Clear, Close

### Event

Tick the events that you want to clear duties from. You can clear duty participation from one or multiple events at the same time.

Event

- 9:30am Traditional
- 11:00am Family
- 7:00pm Evening

### Duty

Select the Duty/ duties that you want to clear people from.

Duty

- Door Duty
- Overhead
- Music Team
- Piano
- Worship Leader
- Offering
- Speaker

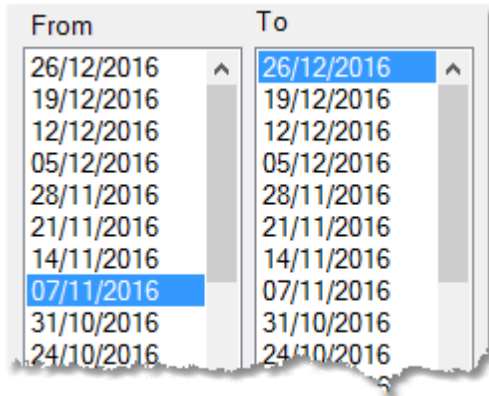
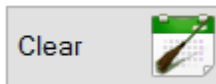


**Tag**

Use the Tag all and Untag all buttons to select or de-select all duties in the list.

**Date Range**

Select the date range to work with for clearing.

**Clear**

Press the Clear button to complete removing assigned duties to the selected Events and Date Range.

Once completed, this action cannot be undone.

## 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 (right) 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)



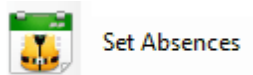
- [Using Filters](#)
- [Absence](#)
- [Association](#)
- [Rules](#)

### 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.

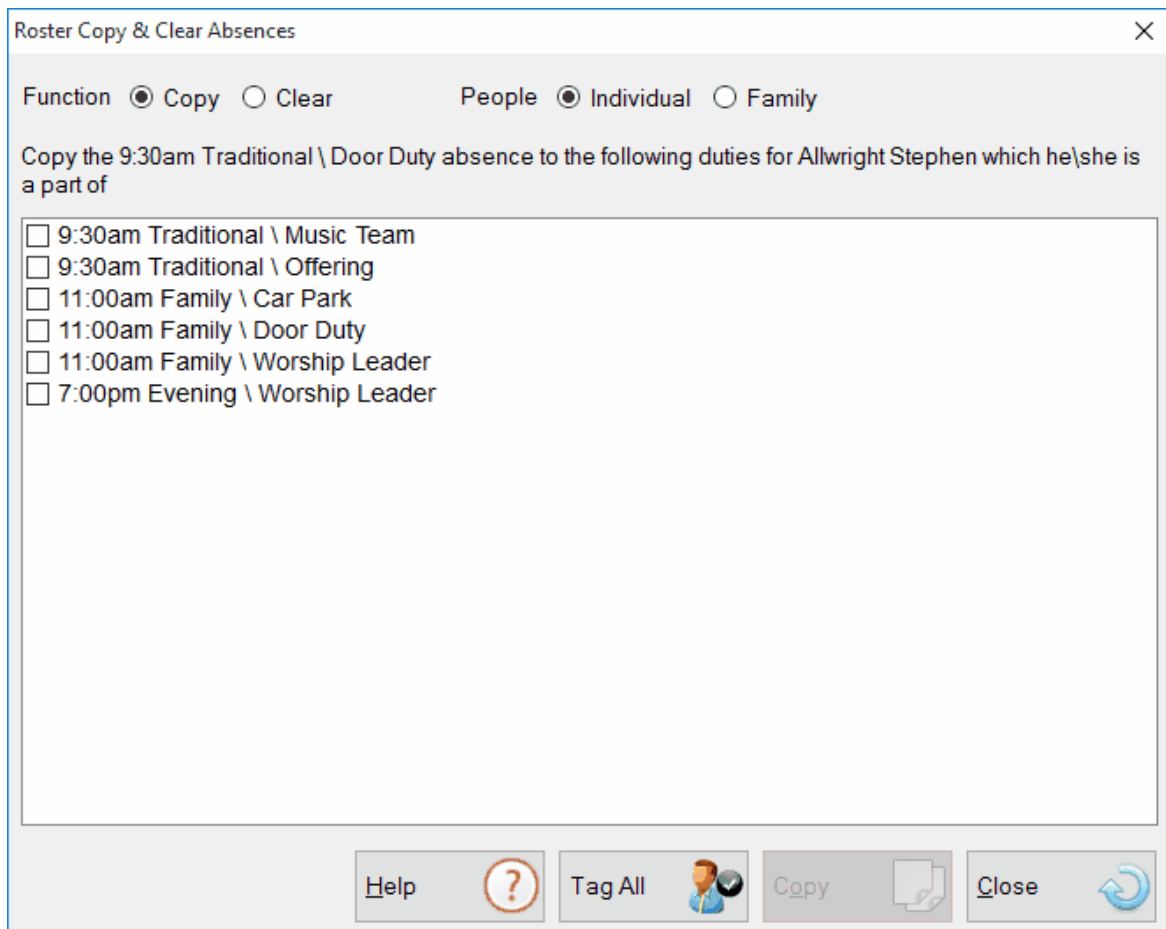
In the sample window below, you can see that for the 9:30 Am Service, Levi Anglin cannot do the Overhead on the first Sunday of each month.

## 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.



### Function

Function  Copy  Clear

### Copy

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

People  Individual  Family

### Individual

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.

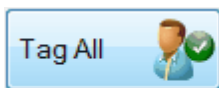
Note that above this list in a clear text sentence is the name of the selected person, and the name of the selected duty that you were on when you pressed the Copy button on the Roster Absences window.

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

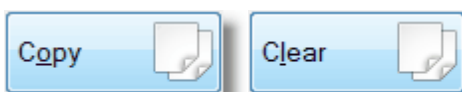
For example, we have set Stephen as being NOT AVAILABLE for the the 9:30am Door Duty, and if we wanted to be sure that Stephen was not available for anything else that day, we would tick all items in this list and press the Copy Button to complete that selection.

## 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, 27 October 2015 To Wednesday, 27 January 2016

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.

Absence Review ×

Anglin Levi Not Available for...

9:30am Traditional \ Overhead

Tuesday, 27 October 2015 To 
 Wednesday, 27 January 2016

01/11/2015 Sunday

06/12/2015 Sunday

03/01/2016 Sunday

Re Do 
Close

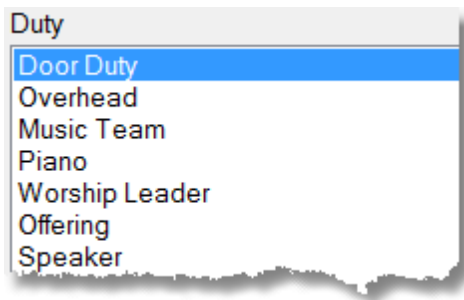
## Event

Event 9:30am Traditional

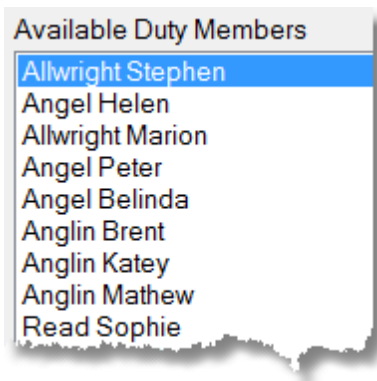
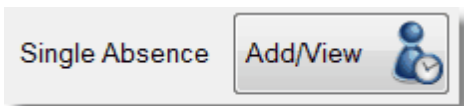
ALWAYS be sure you have selected the correct EVENT when working with Absences. As each Event / Duty Combination is completely unique you may accidentally assign an absence for the wrong event!

**Duty**

Select the Duty for the selected [Event](#) that you want to assign an Absence for.

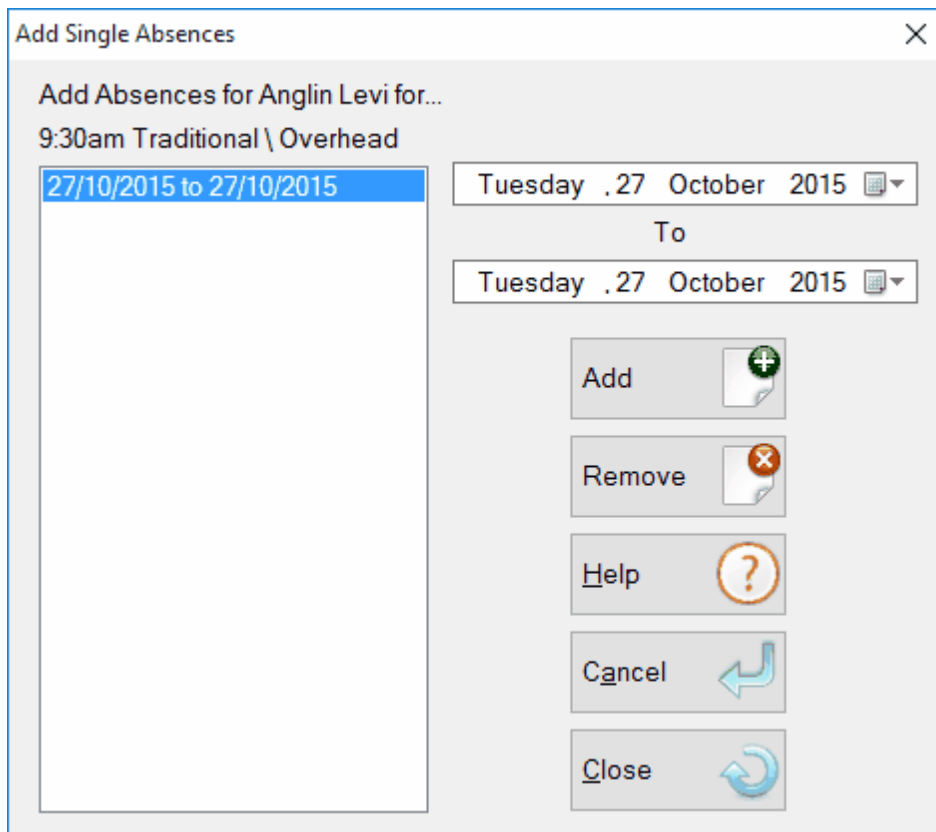
**Duty Members**

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.



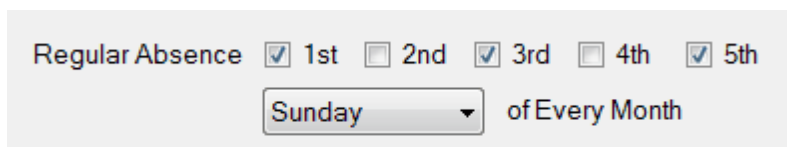


You can see the person's name, the Duty and the Event listed at the top of this window. Simply Use the From and To date controls to set a range of dates for that event / duty combination, and press the Add button to complete.

### 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.

**Absent Every...**

Absent Every  For

This person is away on

Monday  Tuesday  Wednesday  
 Thursday  Friday  Saturday  
 Sunday

Starting From

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 11/14/14, 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.

**Clean Up Single Absences****Clean up Single Absences**

This feature is available from the Participants Button on the Roster Toolbar. This allows you to go back through your absence data and clear out any records of old past absences. This only works on manual dates, not on patterns or automatic absences like "1st Sunday of Every Month".

Why would you clear manual absence data out? The reason is for performance. As the Absence table grows with data, Pastoral Care will need to trawl through more and more data when checking peoples availability for the roster. The less data there is to analyze, the faster the Roster Auto Build will be.

Simply press the Clean Up Absences button on the Participation menu, and the following screen is shown. Select a date to start from, press Clean, and Pastoral Care will delete all OLDER dates from that selected date. It may be prudent to have a backup of Pastoral Care before deleting data, in case you enter the wrong date!

Roster Absences

Clean all Fixed Absences Before...

Help ? Clean Clean

## Association



Set Associations

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.

Roster Associations
✕

Close
 Help

Event 9:30am Traditional

Duty

Door Duty

Duty Members

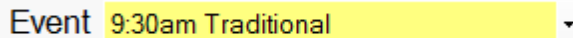
- Allwright Stephen
- Allwright Marion
- Angel Peter
- Angel Belinda
- Angel Helen
- Anglin Brent
- Anglin Katey
- Anglin Mathew
- Read Sophie
- Chapman Ruth

Display Mode

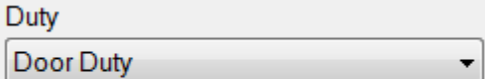
Current Duty
  Current Event
  All Events
  Associations Only

Associate Where Possible
Never Associate

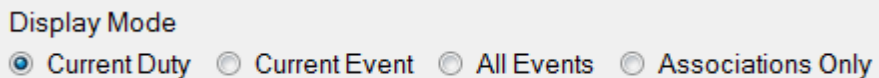
- Allwright Marion
- Angel Peter
- Angel Belinda
- Angel Helen
- Anglin Brent
- Anglin Katey
- Anglin Mathew
- Read Sophie
- Chapman Ruth

**Event**

 Event 9:30am Traditional

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](#))

**Duty**

 Duty  
Door Duty

Select the Duty that you want to select people from to either Associate or Never Associate them with someone else.

**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

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

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!

### 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.

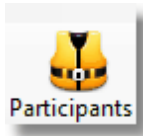
Click on each of the following topics for more information.

- [Using Filters](#)
- [Adding People to Duties](#)
- [Adding Teams to Duties](#)



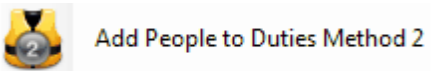
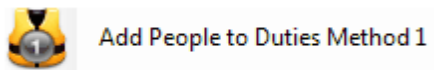
- [Absence](#)
- [Association](#)
- [Copy Duties](#)
- [Duty Properties](#)

## 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!

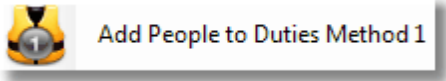
Click on each method below to find out how each method can be used.



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.



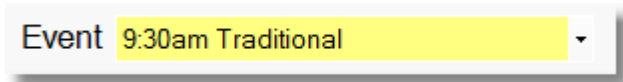
**Method 1**



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](#).

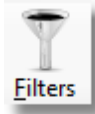
The Add People (Participants) to Duties Method 1 window is shown below. Click on each feature of this window to learn more about how this feature works.

**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.

## 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  Load in All People

### Load Roster Participants

Choose this option to load in all people currently participating in the roster.

### Load in All People

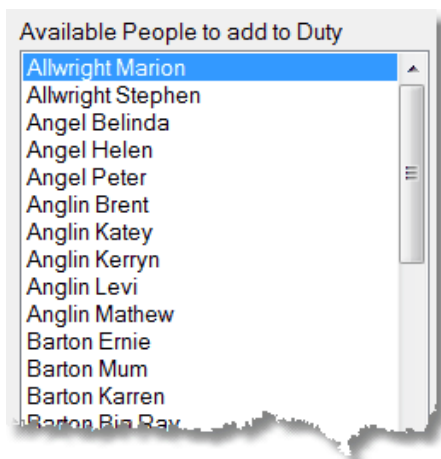
Choose this option to load in all people in your Pastoral Care database, this option also allows you to use FILTERS to restrict your load to a selected group(s). See [Filters](#) for more information.

## 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!





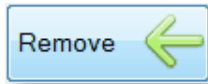
## Function Buttons

Shown below are each of the function buttons on the Add people Method 1 form.



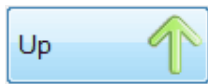
Add the currently Selected Person in the [Available People List](#) to the currently selected Duty in the [Duty List](#).

Don't forget to always check the [Selected Event](#) before adding and removing people from a Duty.

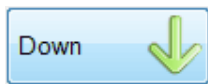


Remove the currently Selected Person in the [Duty List](#) from that duty.

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.



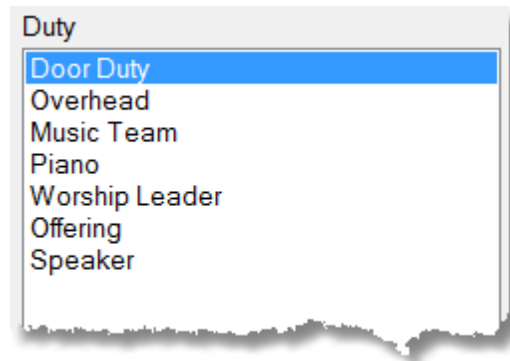
Sort the selected person in the Duty List by moving them lower down in the list. This will have the effect of decreasing the priority of that person being selected by the roster Auto Build function.



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



### Add People to Duties 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.

**Add Roster Participants Method 2**

Close Filters Roll Help

Load Participants in Current Event  
 Load in All People

Available People to add to Duty

- Allwright Marion
- Allwright Stephen
- Angel Belinda
- Angel Helen
- Angel Peter
- Anglin Brent
- Anglin Katey
- Anglin Kerryn
- Anglin Levi
- Anglin Mathew
- Barton Ernie
- Barton Ethel
- Barton Karren
- Barton Ray
- Blackeby Dot
- Blackeby Frank
- Blackeby Heather
- Blackeby Helen
- Brown Heather
- Brown Joshua
- Brown Peter
- Chapman Adrian
- Chapman Ruth
- Gordan James
- Graham Janis
- Graham Joel
- Graham Ross

Event: 9:30am Traditional

Duty: Double Click to Tag a Person

- Door Duty
- Overhead
- Music Team
- Piano
- Worship Leader
- Offering
- Speaker

Duty Member Properties

Substitute Text:

Add '& Family'

Frequency in Auto Build: None

'Max Amount' in Auto Build: No Limit

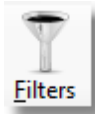
## Selected Event

Event: 9:30am Traditional

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.

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
- Load in All People

### Load Participants in Current Event

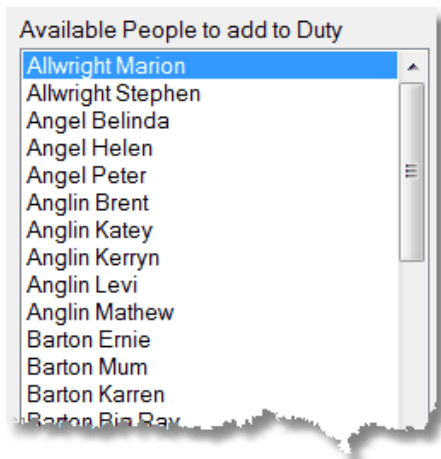
Choose this option to load in all people currently participating in the roster in the current event. If ALL EVENTS is selected, then this will load all people in all events / duties.

### Load 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.

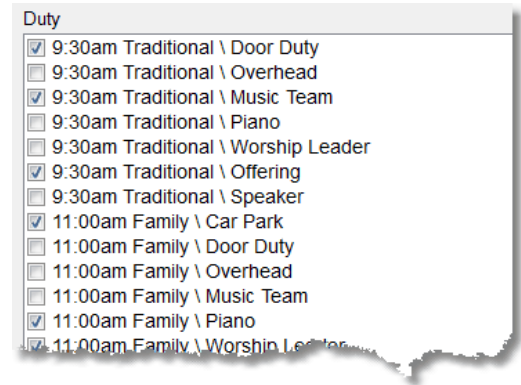


**Duty List**

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.



**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

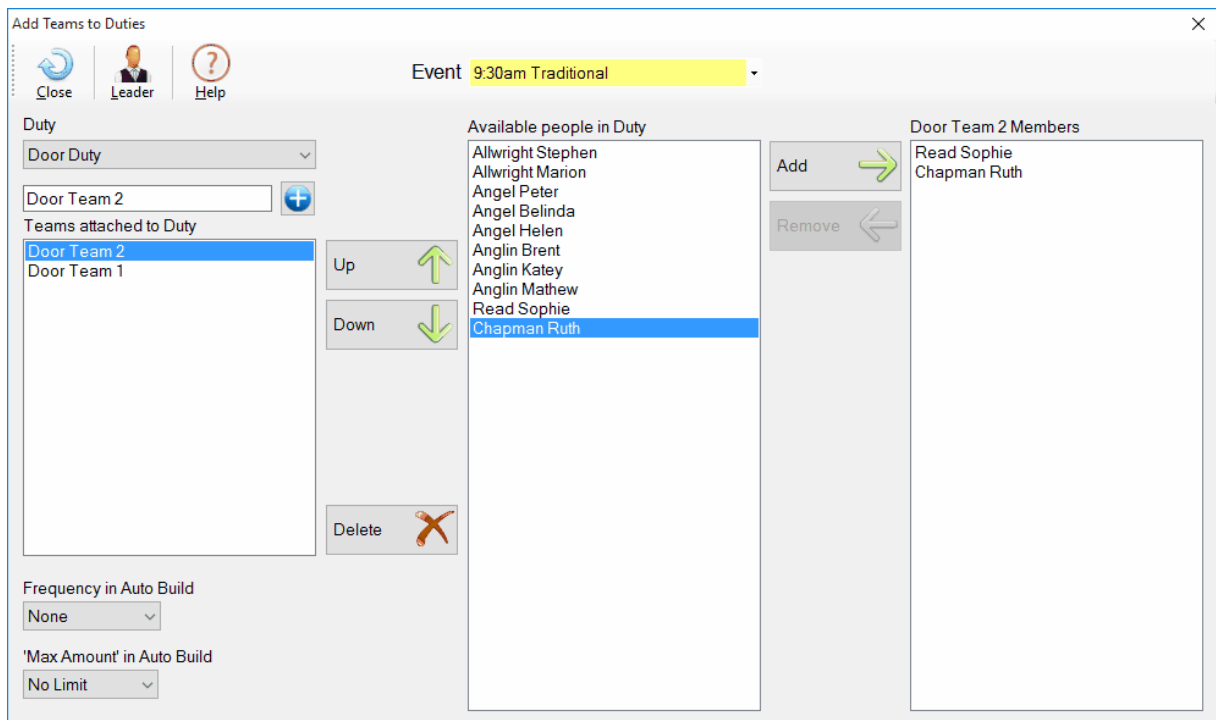
The default setting is None, and this allows Pastoral Care you fit in all people without any programmed in bias.

## 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...

Assign Team Leader to the Door Team 2 team

Select Team Leader from...

Within Team

All Participants in Rosters

Leaders Phone Number

054-33-5478

Team Notes

Allwright Stephen

Allwright Marion

Angel Peter

Angel Belinda

Angel Helen

Anglin Brent

Anglin Katey

Anglin Mathew

Anglin Levi

Anglin Kerryn

Barton Ray

Barton Ethel

Barton Ernie

Barton Karren

Blackeby Dot

Blackeby Helen

Blackeby Heather

Brown Peter

Brown Heather

Help ? Close ↻

### 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

Event 9:30am Traditional


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.


### Duty

Duty  
Door Duty

Select a Duty that you want to either Edit an existing team, or to create a new team for.

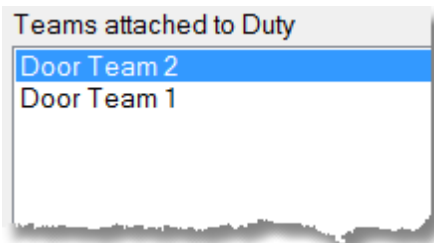
### Add Team Name

Door Team 2 

Type in a new Team Name and press Enter on your keyboard, or press the Blue + () button to add a new team name.

### Current Teams

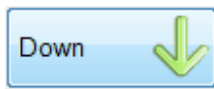
This is the list of current teams you have for the selected Event and Duty. To Edit a team, simply click on a team name here, and add or remove people from the team.



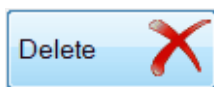
### Function Buttons



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.

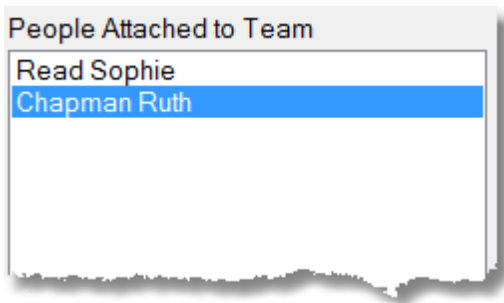
### Available People

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.

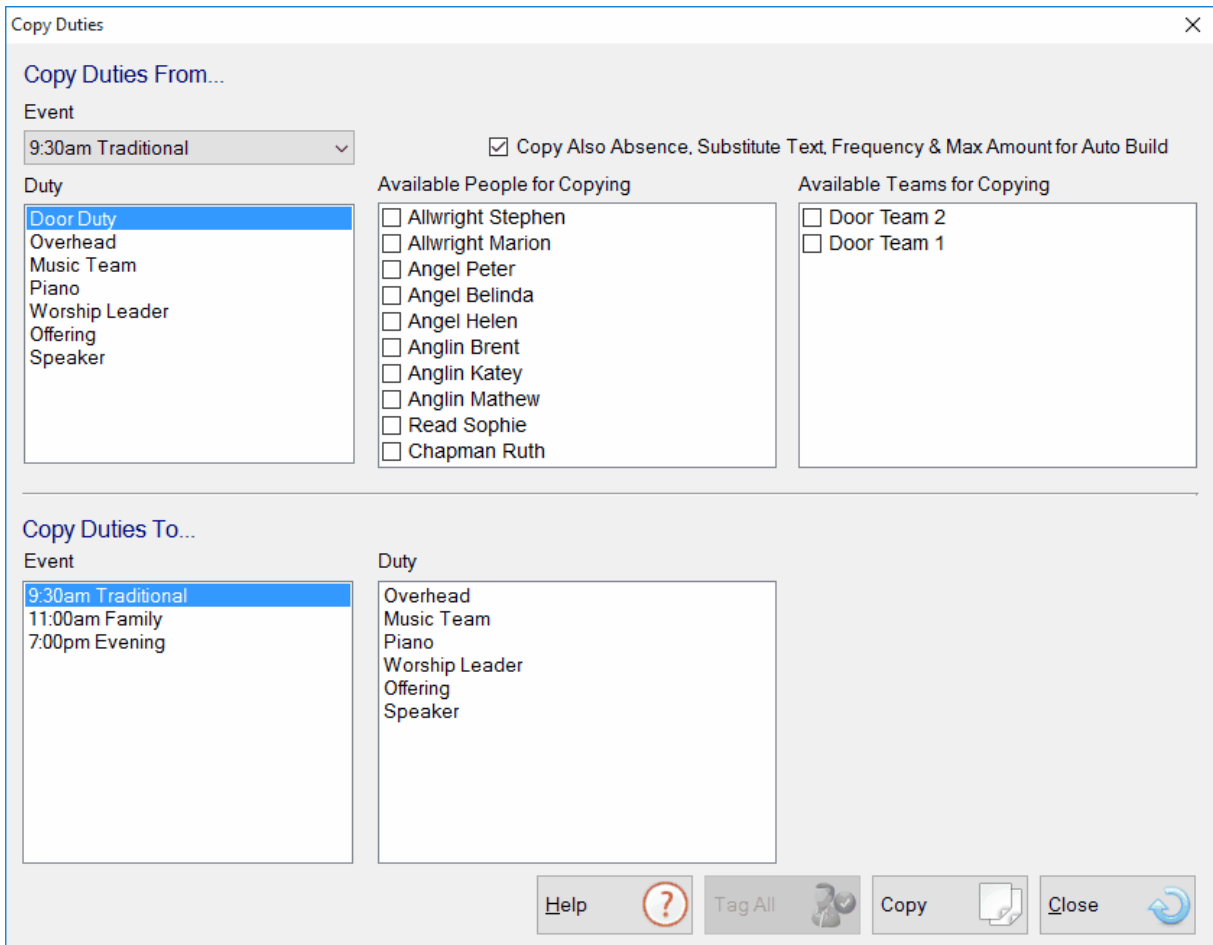


### Copy Duties

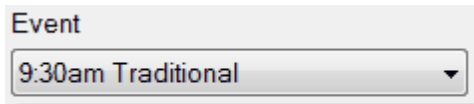
The Copy Duties feature allows you to copy all people set up on a duty to another duty. This can be useful if you are expanding your duties, or even creating a new service at church and you want to quickly take people rostered on for say door duty at one service, to also be rostered on for the second 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.

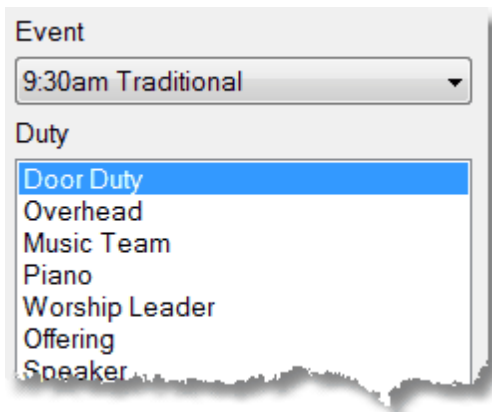


**Source Event**



Select the event that you want to copy a selected Duty from...

**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.

### 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

Available People for Copying

- Allwright Stephen
- Angel Helen
- Allwright Marion
- Angel Peter
- Angel Belinda
- Anglin Brent

Tick the individual people that you want to copy across to another duty.

### Select Teams

Available Teams for Copying

- Door Team 2
- Door Team 1

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.

### Destination Event

Event

- 9:30am Traditional
- 11:00am Family
- 7:00pm Evening

Select the destination EVENT that you want to copy the selected people / Duty to.

### Destination Duty

Duty

- Overhead
- Music Team
- Piano
- Worship Leader
- Offering
- Speaker

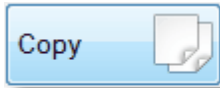
Select the Destination Duty that you want to copy the selected people to.

### Tag All



Press the Tag All button to tag all people in the selected duty. (Click on one person to active this button first)

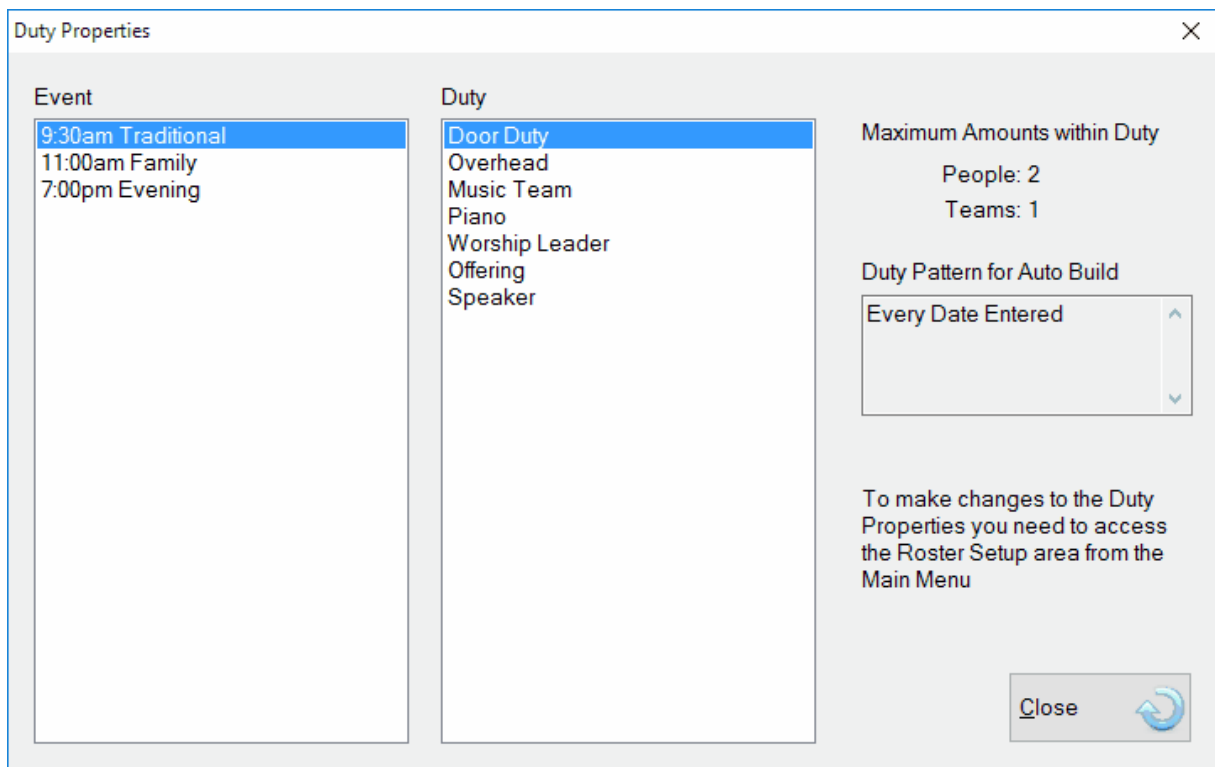
### Copy



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!

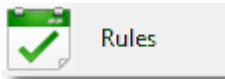


- [Absence](#)

- [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.

Rules X

All Roster Events v

Assign to Duty Dont Assign to Duty

If a person \ team has been assigned to...

9:30am Traditional \ Door Duty v

If possible also assign them to the following duties for the same day...

- 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
- 11:00am Family \ Childrens Address
- 11:00am Family \ Offering
- 11:00am Family \ Speaker
- 11:00am Family \ Communion
- 11:00am Family \ Kitchen

Note: A Person \ Team must be attached to both duties for this rule to work

Help ? Close ↻

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

All Roster Events

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.

Assign to Duty      Dont Assign to Duty

If a person \ team has been assigned to...

9:30am Traditional \ Door Duty

If possible also assign them to the following duties for the same day...

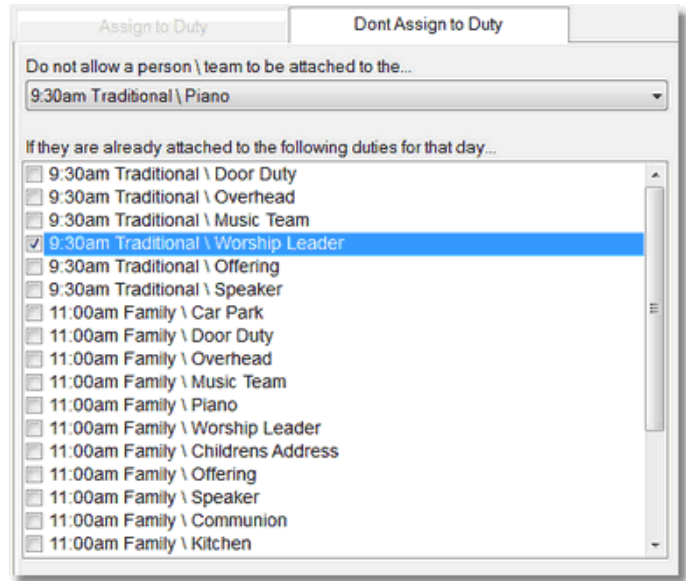
- 9:30am Traditional \ Overhead
- 9:30am Traditional \ Music Team
- 9:30am Traditional \ Piano
- 9:30am Traditional \ Worship Leader
- 9:30am Traditional \ Offering
- 9:30am Traditional \ Speaker
- 11:00am Family \ Car Park
- 11:00am Family \ Door Duty
- 11:00am Family \ Overhead
- 11:00am Family \ Music Team
- 11:00am Family \ Piano
- 11:00am Family \ Worship Leader
- 11:00am Family \ Childrens Address
- 11:00am Family \ Offering
- 11:00am Family \ Speaker
- 11:00am Family \ Communion
- 11:00am Family \ Kitchen

Note: A Person \ Team must be attached to both duties for this rule to work

### 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.

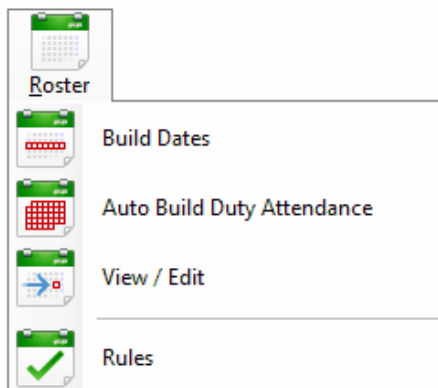


## Step 4

### 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

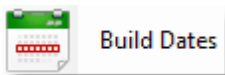
The very first step to actually building a Roster is to create the dates for each event. Fortunately this process is simple and fast, you do not have to create a date manually for each day / event.

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.

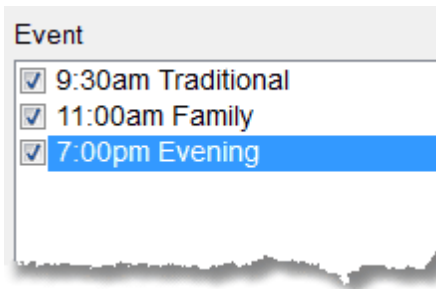


Click on each part of this window to learn how to build dates for your roster.

 A screenshot of the 'Build Dates' software window. The window has a title bar with 'Build Dates' and a close button. On the left, there is a list of events: '9:30am Traditional' (checked), '11:00am Family', and '7:00pm Evening'. The main area has three tabs: 'Build a Date Range' (selected), 'Build a Single Date', and 'Replace a Date Range'. Under 'Build a Date Range', there are two date pickers: 'Thursday . 27 October 2016' and 'Tuesday . 27 December 2016'. Below these are two radio buttons: 'Build by Day Separation' (selected) with a '7' in a spinner box and 'Days' label, and 'Build by Regular Pattern' with options for '1st', '2nd', '3rd', '4th', and '5th', and a dropdown menu set to 'Sunday' with 'of Every Month' below it. At the bottom, there are buttons for 'Help', 'Build', and 'Close', along with a refresh icon.

## 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

### Build By Day Separation

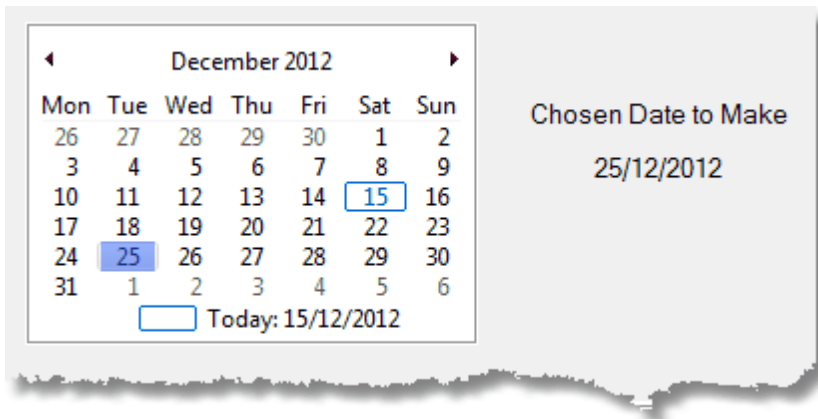
If you choose a Date Range starting on a Friday, and select Built By Day Separation, and select 7 days, Pastoral Care will start with the first day in the date range (A Friday in this example) and add a date for every 7 Days (more Fridays!) until the end date is reached.

### 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.

### 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 a lot 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)

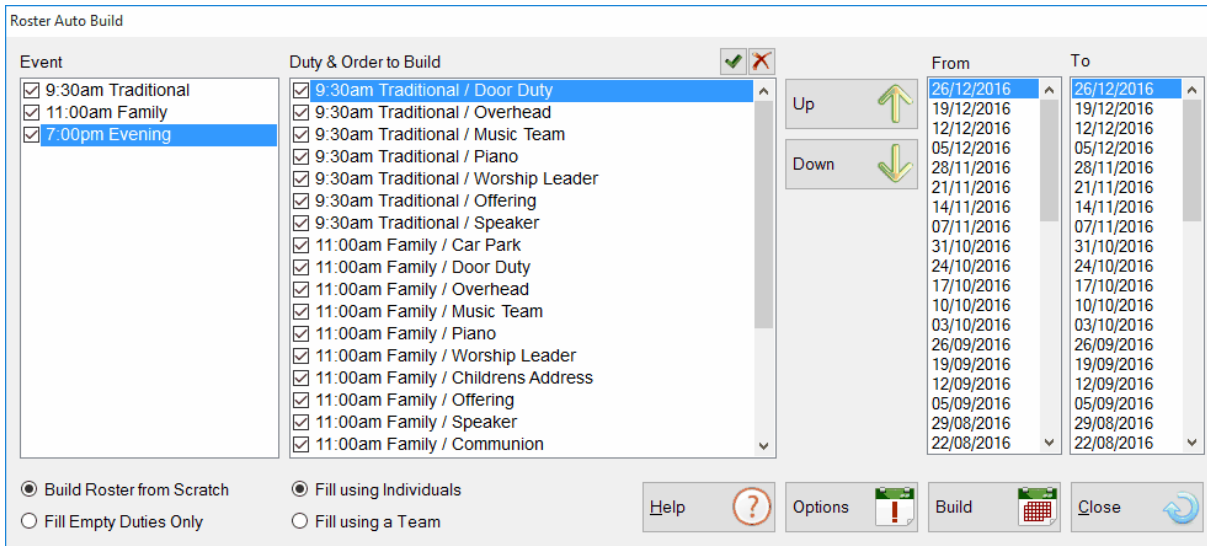
[Step 2](#) (Managing Duties)

[Step 3](#) (Managing Rules)

[Step 4 - \(Build Dates\)](#)

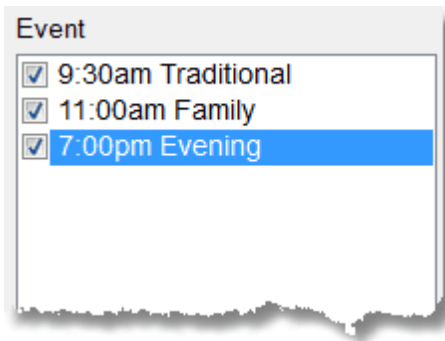


Click on each part of the Auto Build screen to learn more about the options.



**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.

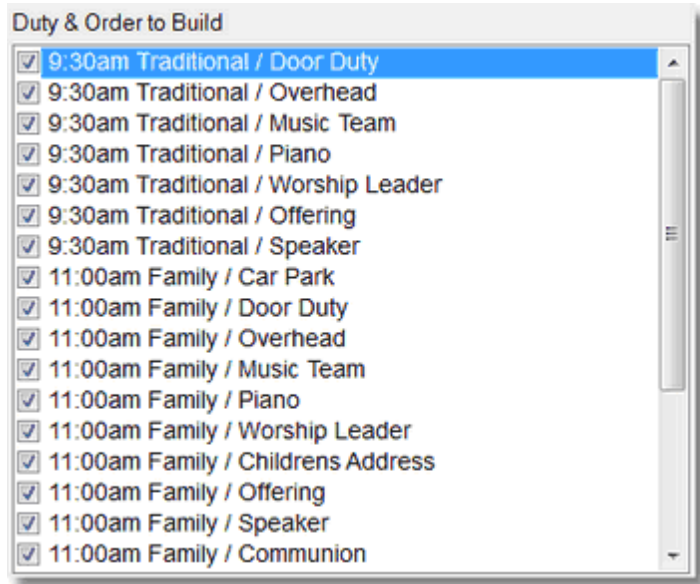
**Tag / Untag All**

 Press the Green tick icon to select all duties for Auto Build

 Press the red Cross Icon to de-select all duties for Auto Build

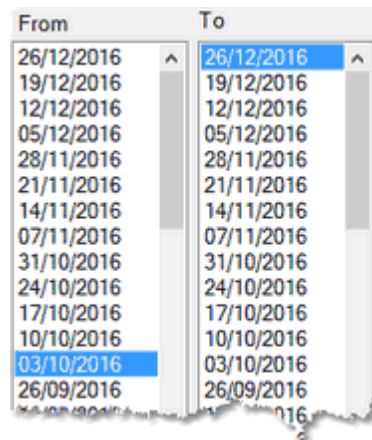
### Duty Build List

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.



### Build Roster from Scratch

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.

### Fill Empty Duties Only

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 Using Individuals

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 a Team

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.

### Options

Shown below is the Options screen for controlling the Auto Build.

See also [The Auto Build Screen](#)

**Auto Build Options**

<p><b>Properties</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Enable Roster Rule Assign to Duty</li> <li><input checked="" type="checkbox"/> Enable Roster Rule Dont Assign to Duty</li> <li><input checked="" type="checkbox"/> Enable Duty Setup Auto Build Pattern</li> <li><input checked="" type="checkbox"/> Enable Absence</li> <li><input checked="" type="checkbox"/> Enable Associate where Possible</li> <li><input checked="" type="checkbox"/> Enable Never Associate</li> <li><input checked="" type="checkbox"/> Enable Individual Frequency</li> <li><input checked="" type="checkbox"/> Enable Individual Max Amount</li> <li><input checked="" type="checkbox"/> Enable Team Frequency</li> <li><input checked="" type="checkbox"/> Enable Team Max Amount</li> </ul>	<p><b>Finding Duty Members</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Find by Preference Order</li> <li><input type="radio"/> Find Alphabetically A-Z</li> <li><input type="radio"/> Find Alphabetically Z-A</li> <li><input type="radio"/> Find Randomly</li> </ul> <p><b>Consider Previous Records</b></p> <p>Records to look back before build start date <input style="width: 60px;" type="text" value="2"/></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Priority to People not in look back period</li> </ul>
---	--

### 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: 21/11/2016, 14/11/2016, 07/11/2016, 31/10/2016, 24/10/2016

To: 26/12/2016, 19/12/2016, 12/12/2016, 05/12/2016, 28/11/2016

Allow Substitut Text  Use Team Names

Name To Highlight: \_\_\_\_\_

Current Cell... 24/10/2016 \ 9:30am Traditional \ Car Park

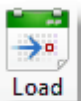
Date \ Duty	Car Park	Door Duty	Overhead	Music Team	Piano	Worship Leader	Childrens Address	Offering	Speake
24/10/2016 9:30am Traditional		Helen Angel Brent Anglin	Ray Barton	Adrien Chapman Wendy Potter Karren Potter	Nathan Potter	Alison Read		Marion Allwright Stephen Allwright	Wendy F
24/10/2016 11:00am Family	Dot Blackeby Karren Barton	Edith Eadon Ruby Dobber Hugo Dobber	Fran Oliver	Milton Potter Bruce Oliver Esther Nixon Christine Morton	Andrew Read	Belinda Angel	Wendy Iles	Lorraine Dimsey Sarah Dimsey Dodie Dimsey	Bradd Te
24/10/2016 7:00pm Evening		Nathan Potter Karren Potter	Sarah Dimsey	Judy Morton Peter Morton Paula Morton	Edith Eadon	Stephen Allwright		David Edwards John Flemming	Fred Col
31/10/2016 9:30am Traditional		Katey Anglin Mathew Anglin	Ethel Barton	Anna Read Andrew Read Peter Morton	Marcus Read	Anna Read		Peter Angel Marcus Read	Milton Po
31/10/2016 11:00am Family	Helen Blackeby Heather Blackeby	Jack Eadon Charlie Jones Wendy Jones	Bruce Oliver	Paula Morton Nathan Potter Karren Potter Greg Taylor	Alison Read	Katey Anglin	Annita Harris	Mandy Dimsey Nathan Kean Jannet Kean	Ruth Tay
31/10/2016 7:00pm Evening		Alison Read Marcus Read	Karren Dimsey	Greg Nixon Fran Oliver Milton Potter	David Edwards	Helen Angel		Merideth Flemming Penny Flemming	Richard
07/11/2016 9:30am Traditional		Sophie Read Ruth Chapman	Ernie Barton	Heather Blackeby Frank Blackeby Sophie Read	Heather Blackeby	James Gordan		Andrew Read Sophie Read	Nathan F
07/11/2016 11:00am Family	David Edwards Helen Edwards	Lauren Jones Jill Jones Ryan Jones	Esther Nixon	Ruth Taylor Andrew Read Anna Read Alison Read	Karren Potter	Ben Iles	Peter Gray	Mike Knight Sue Knight Jenny Kean	Sophie F
07/11/2016 7:00pm Evening		Sophie Read Ruth Chapman	Michaela Knight	Wendy Potter Nathan Potter Duth Taylor	Helen Edwards	Mathew Anglin		Julie Flemming Edith Eadon	Anna Re

**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



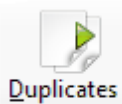
The following options relates only to the display of the roster in the View/Edit grid.

Simply select the desired font and other settings to make your on screen roster easier to read.

**Roster View Options**

<p><b>Column &amp; Row Titles Font</b></p> <p>Font <input type="text" value="Arial"/> <input type="text" value="8"/></p> <p><input type="checkbox"/> Bold Column &amp; Row Titles</p> <p><b>Roster Grid Font</b></p> <p>Font <input type="text" value="Arial"/> <input type="text" value="8"/></p> <p><b>Date Format</b></p> <p><input checked="" type="radio"/> dd/mm/yyyy</p> <p><input type="radio"/> dd-mon-yyyy</p> <p><input type="radio"/> dd-month-yyyy</p>	<p><b>Name Alignment</b></p> <p><input checked="" type="radio"/> Left <input type="radio"/> Centre <input type="radio"/> Right</p> <p><b>Name Format</b></p> <p><input checked="" type="radio"/> Given Name, Surname</p> <p><input type="radio"/> Initial, Surname</p> <p><input type="radio"/> Surname, Given Name</p> <p><input type="radio"/> Surname</p> <p><input type="radio"/> Given Name, Surname Initial</p> <p><input checked="" type="checkbox"/> Shade Alternate Days</p>
---	---

## Duplicates



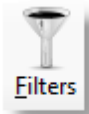
Pressing the Duplicated button will allow you to cycle through events highlighting where a person is doing 2 different tasks at the same event. This tool is useful in helping you avoid conflicting a person with more than one duty at the same time! If you use the [Rules](#) area correctly, you should 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.

Alison Read Marcus Read	Ruth Chapman	Peter Morton Paula Morton Greg Nixon	Heidi
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 Substitutue Text**

Allow Substitutue 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.

**Edit Roster**

9:30am Traditional  
Music Team For the 05/12/2019

<p><b>Available Duty Members</b></p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Blackeby Heather</p> <p>Blackeby Frank</p> <p>Barton Ernie</p> <p>Anglin Levi</p> <p>Allwright Marion</p> <p>Allwright Stephen</p> <p>Angel Peter</p> <p>Angel Helen</p> <p>Anglin Katey</p> <p>Brown Peter</p> <p>Brown Heather</p> <p>Brown Joshua</p> <p>Chapman Adrien</p> <p>Potter Wendy</p> <p>Potter Karren</p> <p>Read Anna</p> <p>Read Andrew</p> <p>Morton Peter</p> <p>Read Sophie</p> </div>	<p>Add </p> <p>Remove </p> <p>Comment </p> <p>Edit Comment </p> <p>Statistics </p>	<p><b>Individuals Rostered On</b></p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Brown Joshua</p> <p>Chapman Adrien</p> <p>Potter Wendy</p> </div>
<p><b>Available Duty Teams</b></p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Music Team 1</p> <p>Music Team 2</p> <p>Music Team 3</p> <p>Music Team 4</p> </div>	<p>Add </p> <p>Remove </p>	<p><b>Teams Rostered On</b></p> <div style="border: 1px solid #ccc; padding: 5px; height: 80px;"> </div>

Help

Close

### 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.

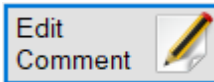
**Add Comment** ✕

Comments can be included in the roster grid. This can be used for adding someone into the roster who is not in the Pastoral Care database, for example a visiting speaker or for placing special information for the service, for example, Mission Sunday.

For the Event \ Date Chosen

Add to selected Duty  
 Add to all Duties  
 Add to all Duties with no people attached

### Edit Comment



Press this to be able to make a change to a Roster Grid Comment.

### 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.

**Individual Roster Statistics** ✕

Statistics For Potter Milton

Rostered On Statistics

Amount	Event	Duty
4	9:30am Traditional	Piano
7	9:30am Traditional	Speaker
3	11:00am Family	Overhead
15	11:00am Family	Music Team
11	11:00am Family	Kitchen
3	7:00pm Evening	Overhead
11	7:00pm Evening	Music Team

▼  
 To  
 ▼

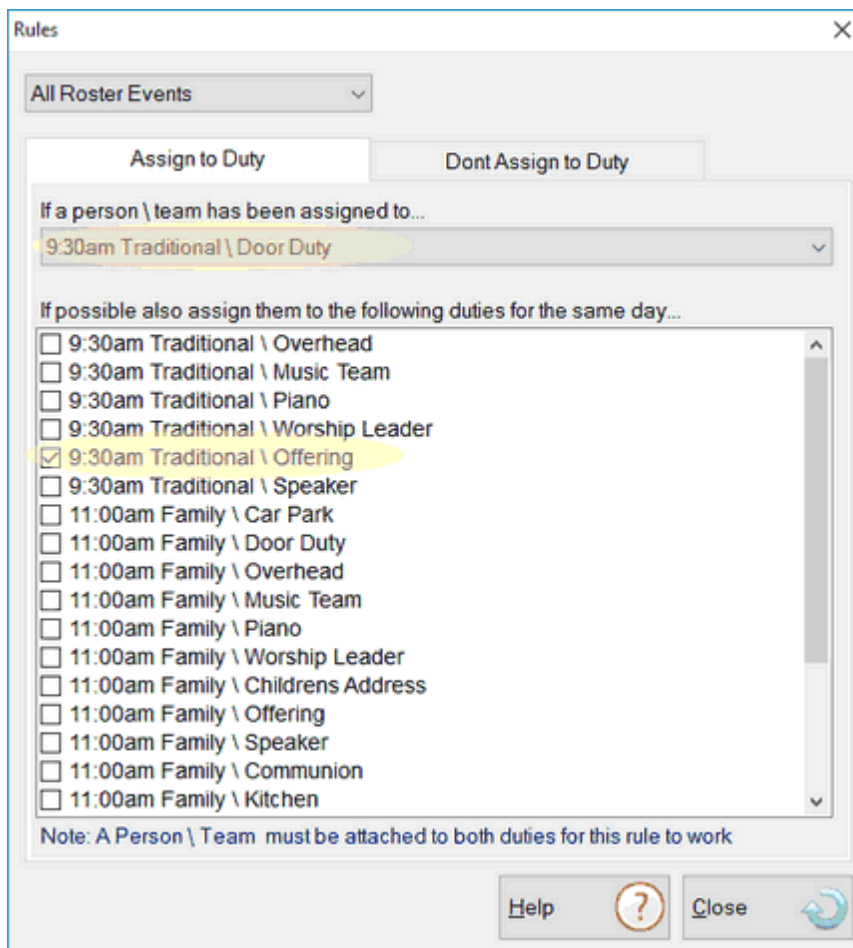
Rostered On Duties

Date	Event	Duty
04/01/2016	11:00am Family	Music Team
11/01/2016	7:00pm Evening	Music Team
18/01/2016	11:00am Family	Kitchen
25/01/2016	9:30am Traditional	Speaker
25/01/2016	11:00am Family	Music Team
15/02/2016	11:00am Family	Kitchen
15/02/2016	7:00pm Evening	Music Team
22/02/2016	11:00am Family	Music Team
28/02/2016	9:30am Traditional	Piano
28/02/2016	11:00am Family	Overhead
14/03/2016	11:00am Family	Music Team

## 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 Door Duty, 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!

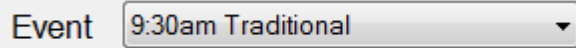
## Manual Build Roster

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.

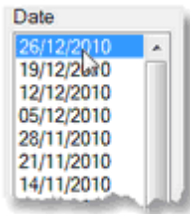
## Steps to add a manual roster

After setting all of your dates, absences and rules, from the main screen of the Roster Program:

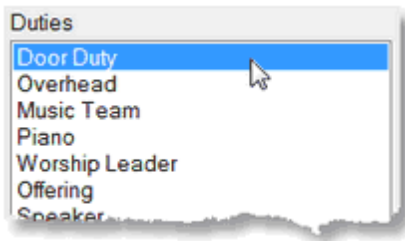
Select your event to Edit



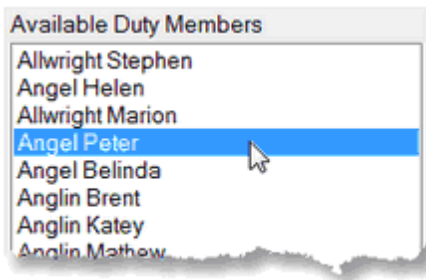
Select a Date from the list of dates on the left hand side of the Roster main window.



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.

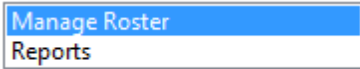


### SMS and Email

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.

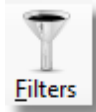
Date   Event	Car Park	Door Duty	Overhead	Music Team
11/01/2013 9:30am Traditional		Thomas Angel Belinda Angel	Kerryn Anglin	Levi Anglin Marion Allwright Stephen Allwright
11/01/2013 11:00am Family	Helen Angel Matthew Anglin	Lyndon Fleming John Fleming Helen Edwards	Ryan Jones	Paula Morton Nathan Potter Karron Potter Greg Taylor
11/01/2013 7:00pm Evening		Allison Read Marcus Read	John Brown	Greg Nixon Fran Oliver Milton Potter
18/01/2013 9:30am Traditional		Helen Angel Brent Anglin	Raymond Barton	Thomas Angel Helen Angel Katey Anglin
18/01/2013 11:00am Family	Brent Anglin Belinda Angel	Edith Eddon Ruby Dobber Huge Dobber	Lauren Jones	Ruth Taylor Andrew Read Anna Read Allison Read
18/01/2013 7:00pm Evening		Sophie Read Ruth Chapman	Stephen Collins	Wendy Potter Nathan Potter Ruth Taylor
25/01/2013 9:30am Traditional		Katey Anglin Michele Anglin	Ethel Barton	Peter Brown Heather Brown Zakus Brown
25/01/2013 11:00am Family	Katey Anglin Levi Anglin	Jack Eddon Charlie Jones Wendy Jones	Wendy Jones	Milton Potter Bruce Oliver Peter Morton Sophie Read
25/01/2013 7:00pm Evening		Adrien Chapman John Brown	Lorraine Dimsey	Brooks Taylor Sophie Read Andrew Read
01/02/2013 9:30am Traditional		Sophie Read Ruth Chapman	Ernie Barton	Adrien Chapman Wendy Potter Karron Potter
01/02/2013 11:00am Family	Kerryn Anglin Ethel Barton	Lauren Jones Jill Jones Ryan Jones	Charlie Jones	Ethel Nixon Christine Morton Paula Morton Nathan Potter
01/02/2013 7:00pm Evening		Hannah Chapman Stephen Collins	Sarah Dimsey	Judy Morton Anna Read Allison Read
08/02/2013 9:30am Traditional		Stephen Allwright Marion Allwright	Karron Barton	Anna Read Andrew Read Peter Morton
08/02/2013 11:00am Family	Raymond Barton Ernie Barton	Nathan Keen Janet Keen Mike Knight	Jill Jones	Karron Potter Greg Taylor Ruth Taylor Andrew Read

### Process



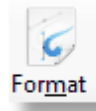
Pressing the Process button will run the currently selected report.

### 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.

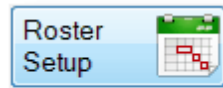
## Common Roster Grid Features

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](#)

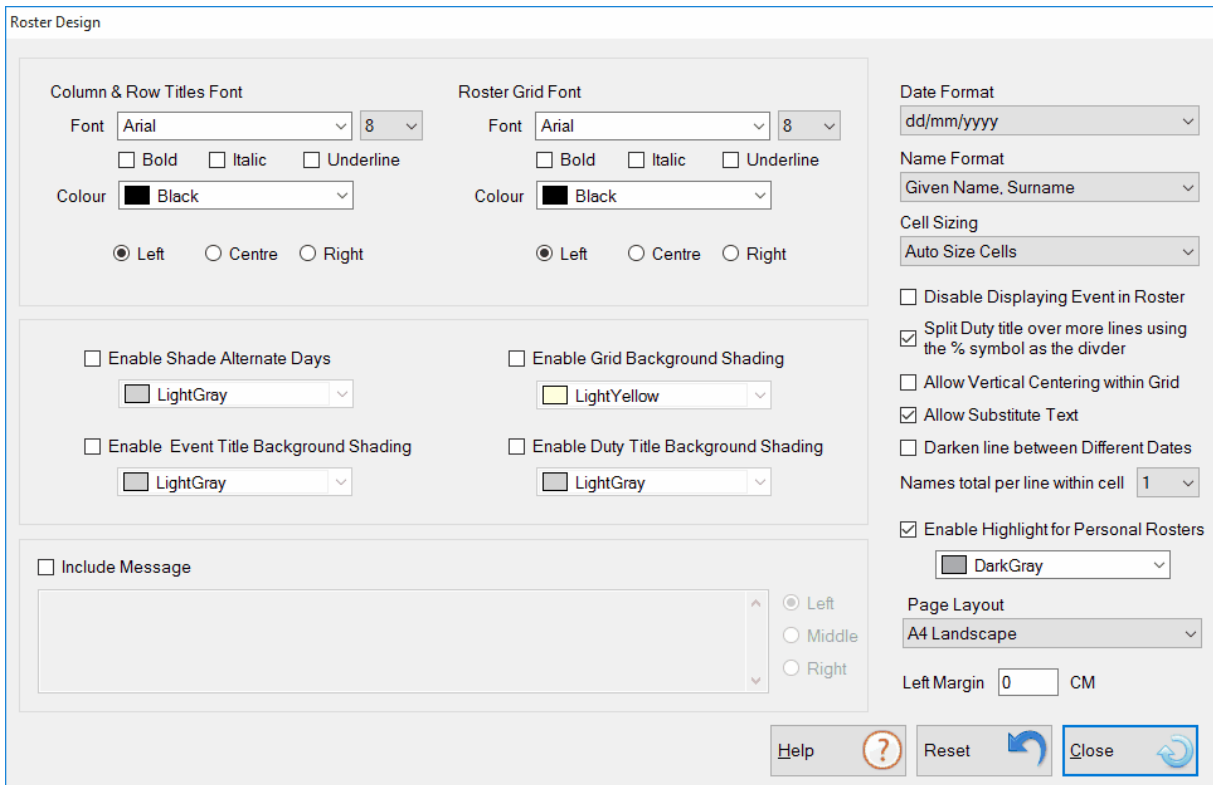
### Roster Setup



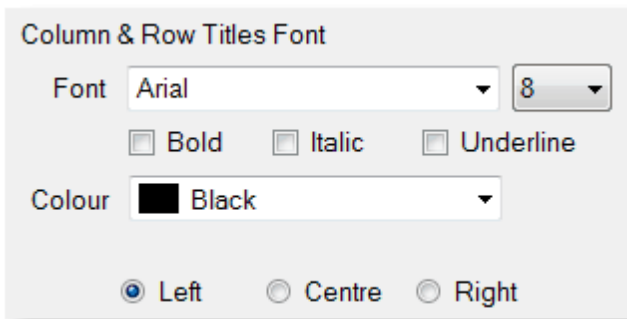
The Roster setup window is available from anywhere a roster is ready to be generated. This screen gives you heaps of options on the formatting of the roster report.



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

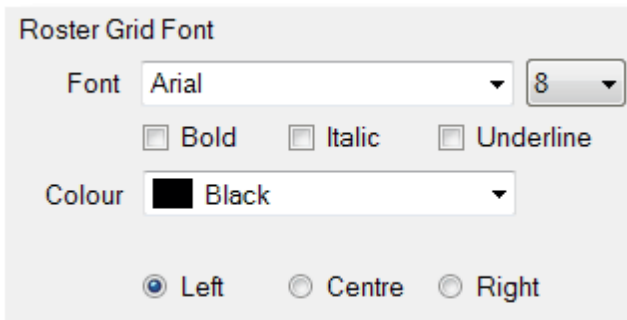


**Column & Row Titles Font**



Set the font options for the Titles that name each Row and Column.

**Roster Grid Font**

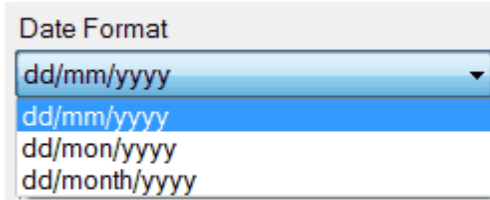


Set the main Grid Font options. If you are running out of room on the Roster Grid, you can try Arial Narrow 8

point as a recommendation.

### Date Format

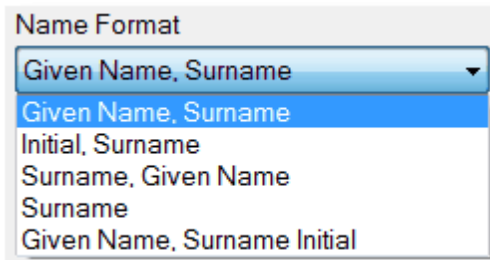
Choose from 3 different Date Formats for display on a Roster Grid report.



Format	Example
dd/mm/yyyy	14/14/2014
dd-mon-yyyy	14-Dec-2014
dd-month-yyyy	14-December-2014

### Name Format

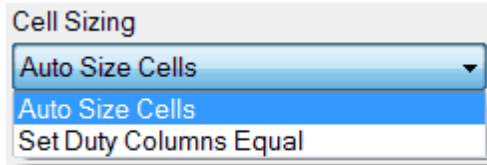
There are 5 different name formats to select from.



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.



### Disable Event Display

Disable the display of the Event Name on the roster by ticking this option.

Disable Displaying Event in Roster

### Split Duty Title

Split Duty title over more lines using the % symbol as the divider

Tick this option to enable splitting a duty description over multiple lines by using the % symbol as a line separator.

For example Communion%Leader would show (if option ticked) as:

Communion  
Leader

### Vertical Centering

Allow Vertical Centering within Grid

Tick this to allow the cell text to be centered vertically in the grid.

### Substitute Text

Allow 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

Darken line between Different Dates

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

Names total per line within cell

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.

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

Page Layout  
  
 Left Margin  CM

Choose the best page layout to suit the size of your roster.

### Shade Alternate Days

Enable Shade Alternate Days

Choose this option to set a colour as a background for each alternate day.

### Grid Background Shading

Enable Background Grid Shading

This sets a default colour as the main background for all Cells that contain people's names on a Roster Grid report.

### Events Title Background Shading

Enable Background Events Title Shading

Tick this option to allow you to select a colour for the background of the Event Titles.

### Duty Title Background Shading

Enable Background Duty Title Shading

Tick this option to allow you to select a colour for the background of the Duty Titles.

### Include Message

Include Message

Enter a message here to be included at the end of any Roster Grid Report

Left  
 Middle  
 Right

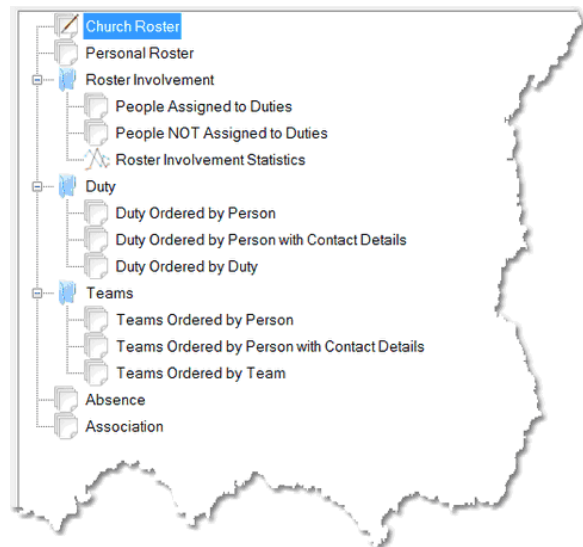
Tick this option to allow you to enter a message that will be printed at the end of any Roster Grid Report. The message can be Left, Middle or Right Aligned.

### 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 Alison Read	Ernie Barton	Merideth Flemming		Peter Iles Charlie Jones	Nathan Potter
28/11/2010			Helen Angel	Helen Blackeby	Katey Anglin Peter Read	Adrien Chummo	Peter Gray		Andrew Read Sophie Read	Fran Oliver

## Church Roster Options

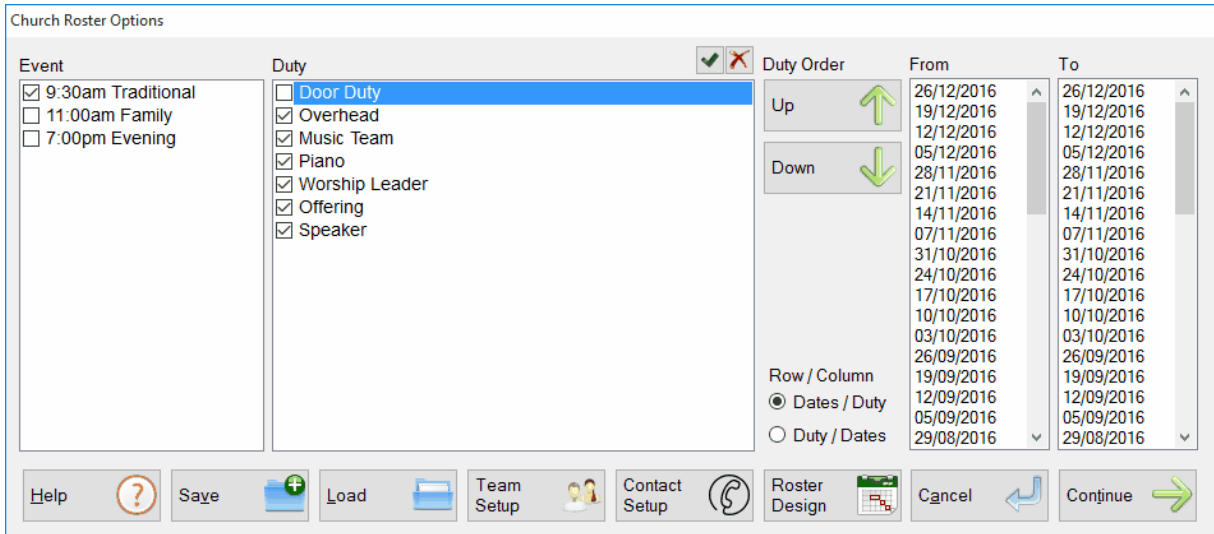
The Church Roster Options let you select what duties, which events, your date range etc for displaying on your roster.

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.



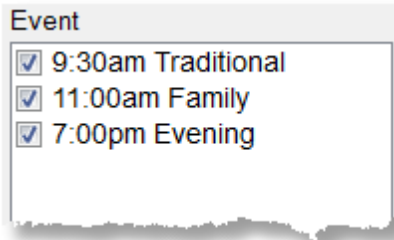
Click on each part of the Roster Options window below to learn more about these options.





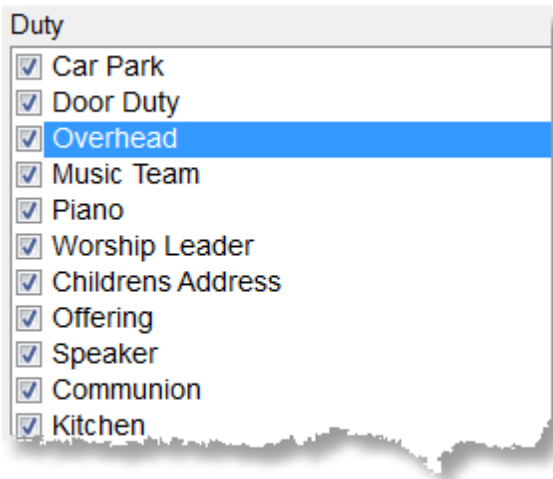
**Select Event**

Select each event that you want to output to a roster report.



**Select Duty**

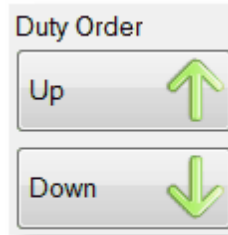
Select each duty that you want to include on the roster report.




### 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.



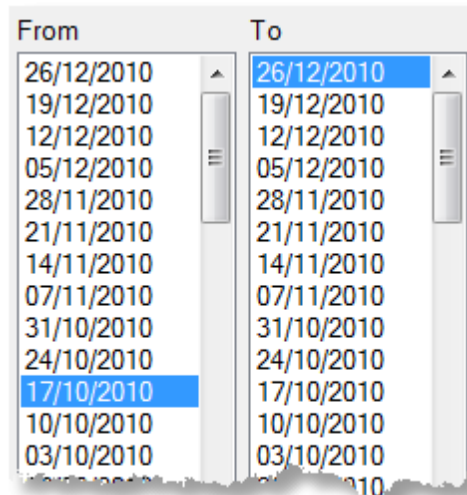
### Tag / Un Tag All

 Press the Green tick icon to select all duties

 Press the red Cross Icon to de-select all duties

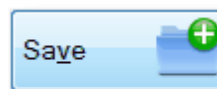
### Select Date Range

Select a From and To date to produce your roster report for.



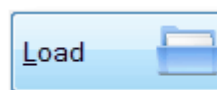
### Save

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 .



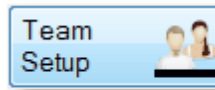
### Load

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.



## 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 1
<input checked="" type="checkbox"/>	9:30am Traditional \ Door Duty \ Door Team 2
<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

### Replace People with Team Name

Replace people assigned in Teams with the Team name

Tick this option to use a Team name in a roster grid, instead of people's own names.

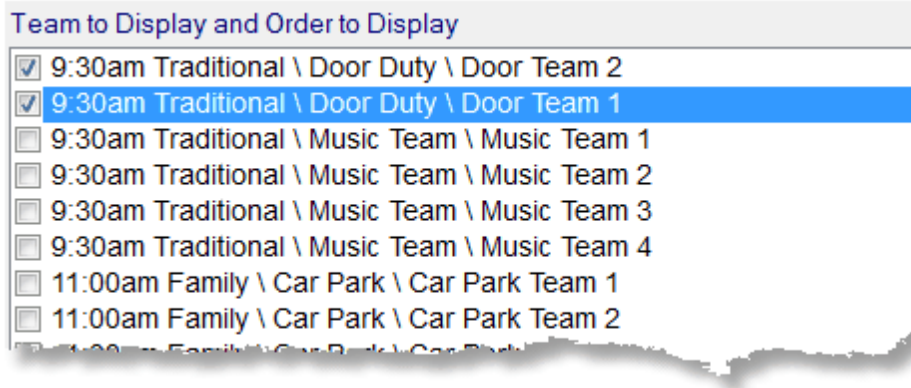
### Display Team Members after the Grid

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.

### 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.

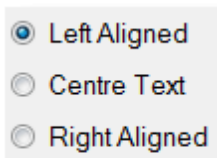


### Sort



Use the Sort Buttons to change the order of team based duties displayed on the Roster Grid.

### Alignment



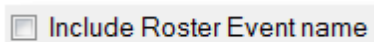
Set the alignment for the text for Team Names displayed / printed on the Roster grid.

### 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.

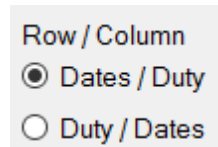
## Contact Setup

Use the Contact Setup to allow you to control the display of Phone Numbers on a roster report.

See [Phone Contact Setup](#) for more information.

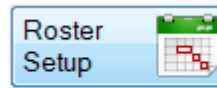
## Column & Row Functions

Pastoral Care has in the past had Dates down the side of the roster with Duties listed across the top. Now there is an option that allows you to swap this around and put dates across the top, with duties down the side.



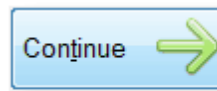
## Roster Setup

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

<b>Event</b> <input checked="" type="checkbox"/> 9:30am Traditional <input checked="" type="checkbox"/> 11:00am Family <input checked="" type="checkbox"/> 7:00pm Evening	<b>Duty</b> <input checked="" type="checkbox"/> Car Park <input checked="" type="checkbox"/> Door Duty <input checked="" type="checkbox"/> Overhead <input checked="" type="checkbox"/> Music Team <input checked="" type="checkbox"/> Piano <input checked="" type="checkbox"/> Worship Leader <input checked="" type="checkbox"/> Childrens Address <input checked="" type="checkbox"/> Offering <input checked="" type="checkbox"/> Speaker <input checked="" type="checkbox"/> Communion <input checked="" type="checkbox"/> Kitchen	<b>Duty Order</b> Up ↑ Down ↓	<b>From</b> 26/12/2016 19/12/2016 12/12/2016 05/12/2016 28/11/2016 21/11/2016 14/11/2016 07/11/2016 31/10/2016 24/10/2016 17/10/2016 10/10/2016	<b>To</b> 26/12/2016 19/12/2016 12/12/2016 05/12/2016 28/11/2016 21/11/2016 14/11/2016 07/11/2016 31/10/2016 24/10/2016 17/10/2016 10/10/2016
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**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, Marion
<input checked="" type="checkbox"/>	Angel	Peter, Belinda, Helen
<input checked="" type="checkbox"/>	Anglin	Katey, Levi, Kerryn
<input checked="" type="checkbox"/>	Barton	Ray, Ethel, Ernie, Karren
<input checked="" type="checkbox"/>	Blackeby	Dot
<input checked="" type="checkbox"/>	Blackeby	Heather, Frank
<input checked="" type="checkbox"/>	Brown	Heather, John
<input checked="" type="checkbox"/>	Chapman	Adrien, Ruth
<input checked="" type="checkbox"/>	Collins	Stephen
<input checked="" type="checkbox"/>	Dimsey	Richard, Lorraine, Mandy
<input checked="" type="checkbox"/>	Dobber	Hugo, Ruby
<input checked="" type="checkbox"/>	Eadon	Jack
<input checked="" type="checkbox"/>	Graham	Joel

Row / Column  
 Dates / Duty  
 Duty / Dates

Help ? Save Load Team Setup Contact Setup Roster Design Cancel Continue

### 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	Allison 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 Fleming 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

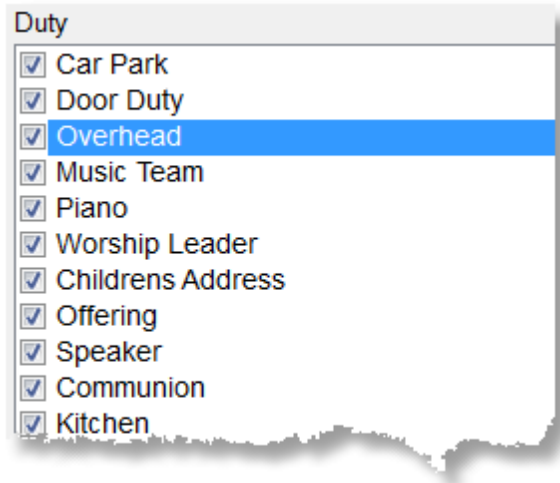
Select each event that you want to output to a roster report.

Event

- 9:30am Traditional
- 11:00am Family
- 7:00pm Evening

## Select Duty

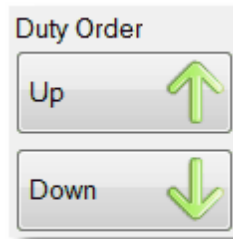
Select each duty that you want to include on the roster report.




## Duty 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.



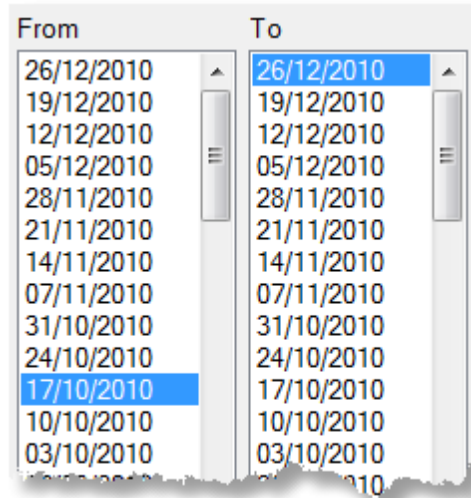
## Tag / Un Tag All

 Press the Green tick icon to select all duties

 Press the red Cross Icon to de-select all duties

## 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

 Press the Green tick icon to select all people

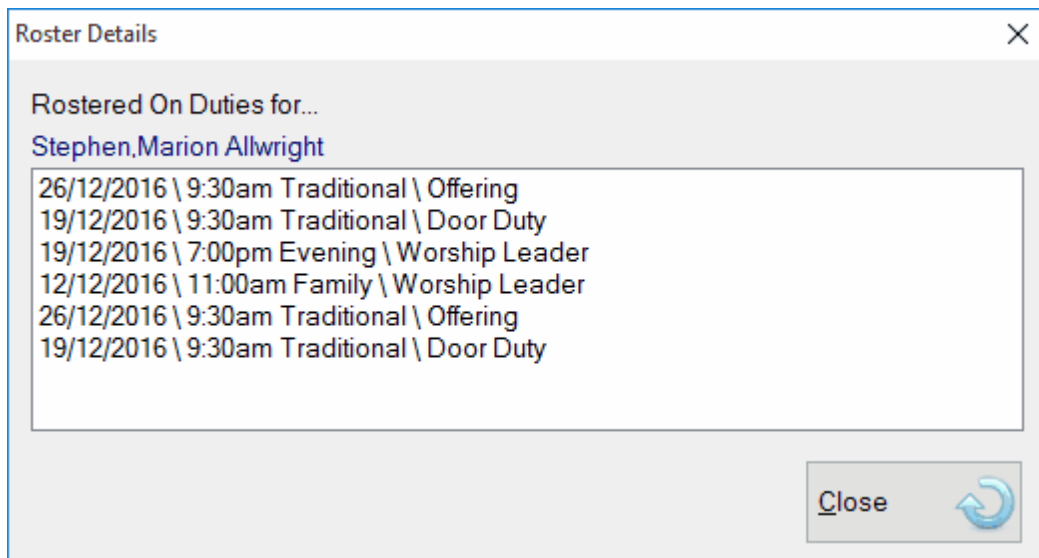
 Press the red Cross Icon to de-select all people

## Details

Press the details button to display the following Details Window for the currently selected individual.

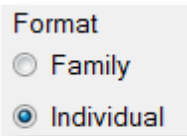






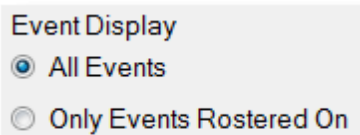
## Format

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.

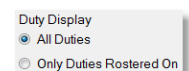


This option is ideal as it creates a roster only for the Days / Events that a person is rostered on for.

## 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.

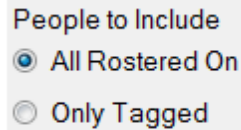


### Only Duties Rostered On

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.

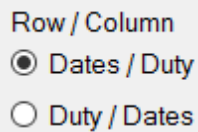
## People to Include

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.



## Column & Row Functions

Pastoral Care has in the past had Dates down the side of the roster with Duties listed across the top. Now there is an option that allows you to swap this around and put dates across the top, with duties down the side.



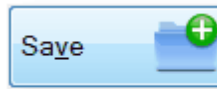
## Contact Setup

Use the Contact Setup to allow you to control the display of Phone Numbers on a roster report.

See [Phone Contact Setup](#) for more information.

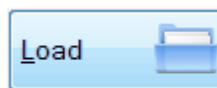
## Save

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.



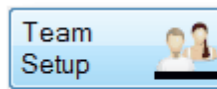
## Load

Use the Load button to load in any saved groups of settings.



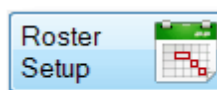
## Team Setup

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.



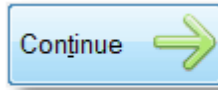
## Roster Setup

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.



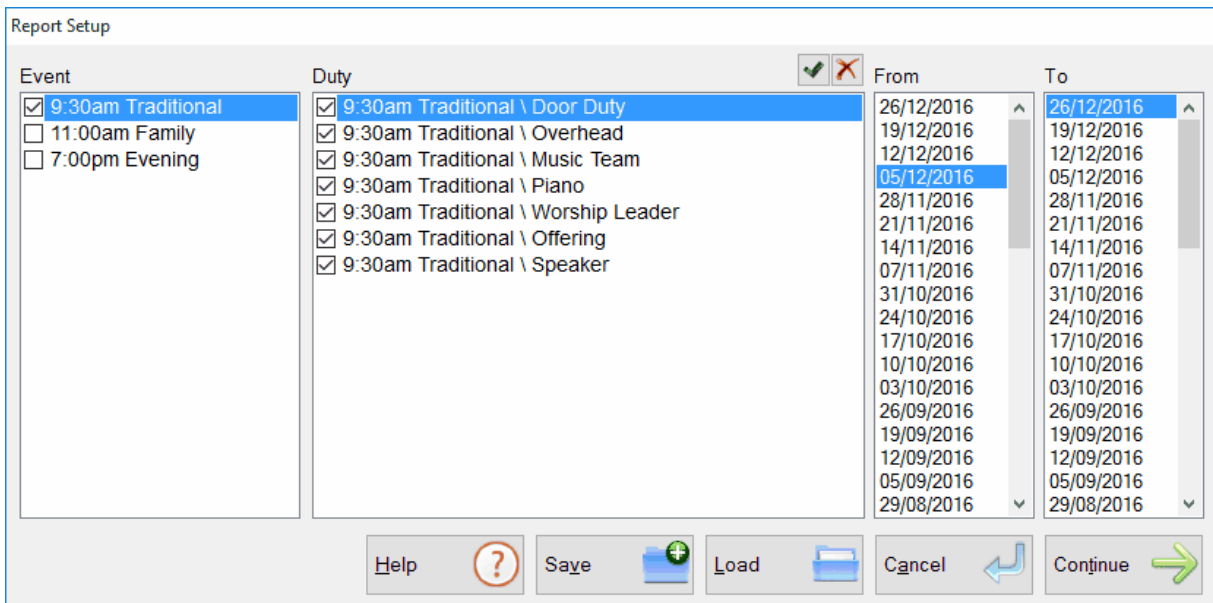
**Roster Involvement**

**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** Select the range of dates to include information on the report from.

**Range**

**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			
<b>Allwright</b>	<b>Stephen</b>	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
<b>Allwright</b>	<b>Marion</b>	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.

**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** Select the range of dates to include information on the report from.

**Range**

**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 26/14 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.

Report Setup

Event	Duty	From	To
<input checked="" type="checkbox"/> 9:30am Traditional	<input checked="" type="checkbox"/> 9:30am Traditional \ Door Duty	26/12/2016	26/12/2016
<input type="checkbox"/> 11:00am Family	<input checked="" type="checkbox"/> 9:30am Traditional \ Overhead	19/12/2016	19/12/2016
<input type="checkbox"/> 7:00pm Evening	<input checked="" type="checkbox"/> 9:30am Traditional \ Music Team	12/12/2016	12/12/2016
	<input checked="" type="checkbox"/> 9:30am Traditional \ Piano	05/12/2016	05/12/2016
	<input checked="" type="checkbox"/> 9:30am Traditional \ Worship Leader	28/11/2016	28/11/2016
	<input checked="" type="checkbox"/> 9:30am Traditional \ Offering	21/11/2016	21/11/2016
	<input checked="" type="checkbox"/> 9:30am Traditional \ Speaker	14/11/2016	14/11/2016
		07/11/2016	07/11/2016
		31/10/2016	31/10/2016
		24/10/2016	24/10/2016
		17/10/2016	17/10/2016
		10/10/2016	10/10/2016
		03/10/2016	03/10/2016
		26/09/2016	26/09/2016
		19/09/2016	19/09/2016
		12/09/2016	12/09/2016
		05/09/2016	05/09/2016
		29/08/2016	29/08/2016

Help ?
Save +
Load
Cancel ↶
Continue →

**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** Select the range of dates to include information on the report from.
- Range**
- 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\_3

Below is a sample Roster Involvement Report.

Roster Participation Statistics Report		
17/10/2010 to 26/12/2010		
<b>Allwright</b>	<b>Stephen</b>	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
<b>Allwright</b>	<b>Marion</b>	2 X 9:30am Traditional \ Door Duty 1 X 9:30am Traditional \ Music Team 4 X 9:30am Traditional \ Offering
<b>Angel</b>	<b>Peter</b>	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

## 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 7:00pm Evening \ Worship Leader
Angel	Peter	9:30am Traditional \ Door Duty 9:30am Traditional \ Music Team 9:30am Traditional \ Offering 11:00am Family \ Car Park 11:00am Family \ Piano 11:00am Family \ Worship Leader

### Duty Ordered By Person with Contact Details

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 and includes phone contact details where available.



### Roster Duty Participation Report

<b>Allwright</b>	<b>Marion</b>	9:30am Traditional \ Door Duty 9:30am Traditional \ Music Team 9:30am Traditional \ Offering
	<b>Mobile:</b> 041234567890	<b>Home:</b> 054-33-5478 <b>Email:</b> business email
<b>Allwright</b>	<b>Stephen</b>	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
	<b>Mobile:</b> 041234567890	<b>Home:</b> 054-33-5478 <b>Email:</b> stephen@spirit.net.au
<b>Angel</b>	<b>Belinda</b>	9:30am Traditional \ Door Duty 11:00am Family \ Car Park 11:00am Family \ Piano 11:00am Family \ Worship Leader
	<b>Mobile:</b> 041234567890	<b>Home:</b> 054-22-1199 <b>Email:</b> stephen@spirit.net.au
<b>Angel</b>	<b>Helen</b>	9:30am Traditional \ Door Duty 9:30am Traditional \ Music Team 11:00am Family \ Car Park 11:00am Family \ Piano 11:00am Family \ Worship Leader
	<b>Mobile:</b> 041234567890	<b>Home:</b> 054-22-1199 <b>Email:</b> stephen@spirit.net.au

**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

<b>9:30am Traditional \ Door Duty</b>	Stephen Allwright, Helen Angel, Marion Allwright, Peter Angel, Belinda Angel, Brent Anglin, Katey Anglin, Mathew Anglin, Sophie Read, Ruth Chapman,
<b>9:30am Traditional \ Overhead</b>	Levi Anglin, Kerryn Anglin, Big Ray Barton, Mum Barton, Ernie Barton, Karren Barton, Dot Blackeby, Helen Blackeby,
<b>9:30am Traditional \ Music Team</b>	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,
<b>9:30am Traditional \ Piano</b>	Heather Blackeby, Heather Brown, Frank Blackeby, Adrien Chapman, Peter Gray, Darryn Harris, Annita Harris, Joel Graham, Milton Potter, Nathan Potter, Marcus Read,
<b>9:30am Traditional \ Worship Leader</b>	James Gordan, Ross Graham, Janis Graham, Peter Gray, Leanne Leah, Kerry Lynch, Christopher Lynch, Allan Lynch, Michael Read, Alison Read, Anna Read,
<b>9:30am Traditional \ Offering</b>	Marion Allwright, Stephen Allwright, Peter Angel, Marcus Read, Andrew Read, Sophie Read,
<b>9:30am Traditional \ Speaker</b>	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 Person with Contact Details

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 and includes phone contact details where available.

### Roster Team Report

Allwright	Stephen	11:00am Family \ Car Park \ Car Park Team 1
	Mobile: 041234567890	Home: 054-33-5478      Email: stephen@spirit.net.au
Angel	Peter	11:00am Family \ Car Park \ Car Park Team 1 11:00am Family \ Car Park \ Car Park Team 2
	Mobile: 041234567890	Home: 054-22-1199      Email: stephen@spirit.net.au
Anglin	Kerryn	11:00am Family \ Car Park \ Car Park Team 3
	Mobile: 041234567890	Home: 03-273214      Email: Brentl@spirit.com.au
Barton	Ernie	11:00am Family \ Car Park \ Car Park Team 3
	Mobile: 041234567890	Home: 03-744-1222      Email: ray@spirit.com.au
Barton	Ethel	11:00am Family \ Car Park \ Car Park Team 2
	Mobile: 041234567890	Home: 03-744-1222      Email: ray@spirit.com.au
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
	Mobile: 041234567890	Home: 03754-2254      Email: adrien@spirit.com.au
Morton	Judy	7:00pm Evening \ Music Team \ Music Team 2
	Mobile: 041234567890	Home: 03-228-1478      Email: david@spirit.com.au
Morton	Paula	7:00pm Evening \ Music Team \ Music Team 2 7:00pm Evening \ Music Team \ Music Team 3
	Mobile: 041234567890	Home: 03-228-1478
Morton		7:00pm Evening \ Music Team \ Music Team 3

### 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

<b>Allwright</b>	<b>Stephen</b>	
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
<b>Anglin</b>	<b>Brent</b>	
9:30am Traditional \ Door Duty		Not Available between 01/01/2004 to 31/01/2004,
<b>Anglin</b>	<b>Katey</b>	
9:30am Traditional \ Door Duty		Not Available 1st, 3rd, Sunday of each month
<b>Anglin</b>	<b>Levi</b>	
9:30am Traditional \ Overhead		Not Available 1st, 3rd, Sunday of each month
<b>Anglin</b>	<b>Mathew</b>	
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.

<b>Roster Association Report</b>	
<b>Allwright</b>	<b>Stephen</b>
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	
<b>Angel</b>	<b>Belinda</b>
9:30am Traditional \ Door Duty \ To Associate with 9:30am Traditional \ Door Duty \ Ruth Chapman	
<b>Angel</b>	<b>Helen</b>
9:30am Traditional \ Door Duty \ Not Associate with 9:30am Traditional \ Door Duty \ Stephen Allwright	
<b>Angel</b>	<b>Peter</b>
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	
<b>Anglin</b>	<b>Brent</b>
9:30am Traditional \ Door Duty \ Not Associate with 9:30am Traditional \ Door Duty \ Peter Angel	
<b>Chapman</b>	<b>Ruth</b>
9:30am Traditional \ Door Duty \ To Associate with 9:30am Traditional \ Door Duty \ Belinda Angel	
<b>Read</b>	<b>Sophie</b>
9:30am Traditional \ Door Duty \ Not Associate with 9:30am Traditional \ Door Duty \ Stephen Allwright	

## Child Safe

Child Safe 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. Using this feature, you are able to record dates of interviews, police checks, governing license details and more. The flexibility of our setup areas for Child Safe allows our software to be configured for any scenario or legislation.



Click on each of the links below for more information on this area.

[Introduction](#)

[Setup Child Safe](#)

[Child Safe Security](#)

[Starting Child Safe](#)

[Child Safe 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 Child Safe 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 Child Safe 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 Child Safe. 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 Child Safe

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 Child Safe](#) area for more details on configuration of Child Safe.

## Security

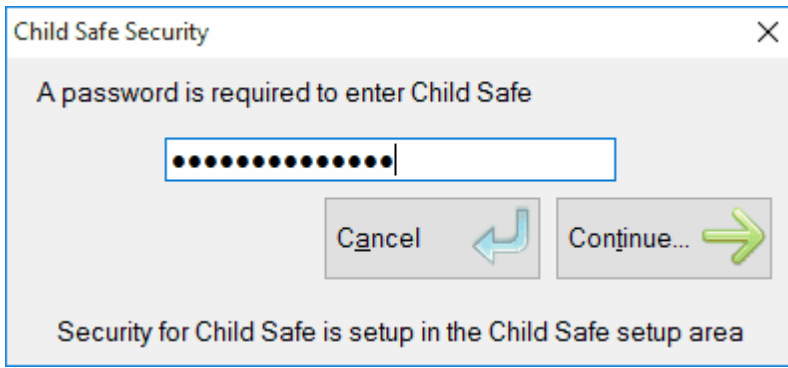
Since the nature of information stored within the Child Safe module is extremely sensitive, extra precautions are taken to secure this data. Access to the Child Safe information can only be assured if correct passwords are used. Therefore good password security practices should be used in your church for this area in particular.

If you already have Pastoral Care security enabled, then a second password is required to access the Child Safe information. The second password is used exclusively in the Child Safe module to set degrees of Access to all areas of the Child Safe 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 Child Safe information. See [Child Safe Security](#) for information on configuration of Security for Child Safe feature levels, and see also [Setup Security](#) for information on general Pastoral Care security features.

## Starting Child Safe

You can start Child Safe from the Church Tab on the Main Menu. Simply double click Child Safe on the Church Tab to load the [Child Safe Main Window](#). When prompted, enter your Child Safe security password. This password not only gives you access to Child Safe, but it also sets all the program features you will have access to, and what you are authorised to do in Child Safe.

## The Child Safe Password Login

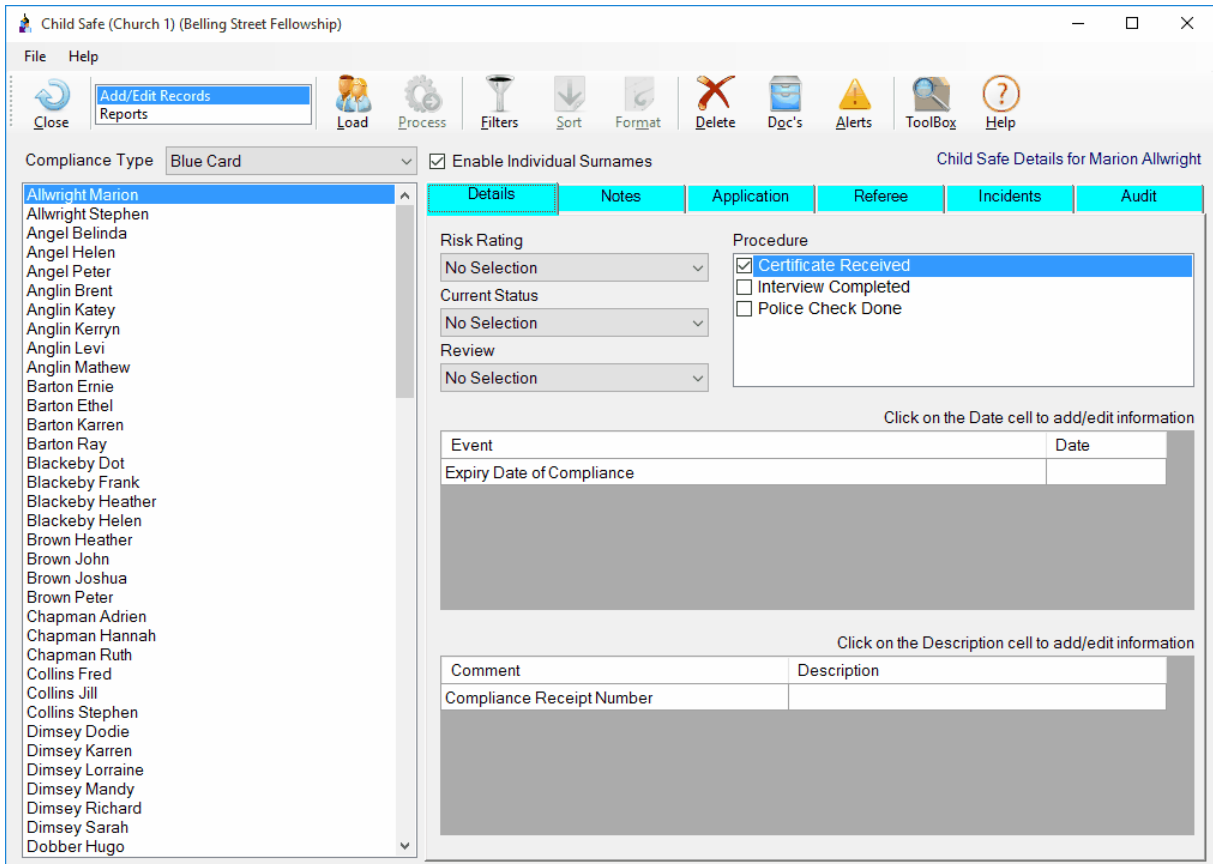


### Child Safe Main Window

Shown below is the Child Safe 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 Child Safe 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 Child Safe window below to learn more.





## 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

## Child Safe Reports

The Child Safe 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 Child Safe. One is called [Add / Edit Records](#), and the other is called Reports. To select the reports area in Child Safe, simply select the reports option from the Child Safe [Menu List](#).

## Pre-Flight Options

Most of the reports in Child Safe 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 Child Safe, click on each report below for more information.



## Build Child Safe Report

The Build Child Safe report allows you to select different Child Safe 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 Child Safe records.

**Pre-Flight**

The Pre-Flight options for the "Build Child Safe Reports" report is shown below.



Click on each option on the sample screen below to learn more about these options.

**Child Safe 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 Child Safe 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	Date Filter  26
Current Status <input type="text" value="No Selection"/>		
Review <input type="text" value="No Selection"/>		
Incident Status <input type="text" value="No Selection"/>		

---

Child Safe 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

Events date order  
 Setup Order  Asc  Desc

**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

**Page Breaks**

Choose Page Break options to enhance the report. For example, if you are printing out all information for each person in Child Safe, 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 Child Safe Filters**

Tick this option to enable all Child Safe 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 Child Safe 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 Child Safe 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

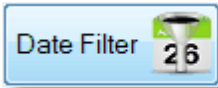
Select a Incident Status option to find all people who's Incident Status matches your selection. For example to find all people with an Incident Status of "Under Investigation" select that status from this list

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 Child Safe 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.

**Child Safe Date Filters**

<input type="checkbox"/> <b>Activate Application Date Filtering</b> <div style="margin-top: 5px;"> <input type="text" value="Friday"/> . <input type="text" value="6 November 2015"/> <input type="button" value="▼"/>  <p style="text-align: center;">To</p> <input type="text" value="Friday"/> . <input type="text" value="6 November 2015"/> <input type="button" value="▼"/> </div>	<input type="checkbox"/> <b>Activate Referee Date Filtering</b> <div style="margin-top: 5px;"> <input type="text" value="Friday"/> . <input type="text" value="6 November 2015"/> <input type="button" value="▼"/>  <p style="text-align: center;">To</p> <input type="text" value="Friday"/> . <input type="text" value="6 November 2015"/> <input type="button" value="▼"/> </div>
<input type="checkbox"/> <b>Activate Incident Date Filtering</b> <div style="margin-top: 5px;"> <input type="text" value="Friday"/> . <input type="text" value="6 November 2015"/> <input type="button" value="▼"/>  <p style="text-align: center;">To</p> <input type="text" value="Friday"/> . <input type="text" value="6 November 2015"/> <input type="button" value="▼"/> </div>	<input type="checkbox"/> <b>Activate Event Date Filtering</b> <div style="margin-top: 5px;"> <input type="text" value="Friday"/> . <input type="text" value="6 November 2015"/> <input type="button" value="▼"/>  <p style="text-align: center;">To</p> <input type="text" value="Friday"/> . <input type="text" value="6 November 2015"/> <input type="button" value="▼"/> </div>

Select the Child Safe components (fields / information) that you want to include on your report.

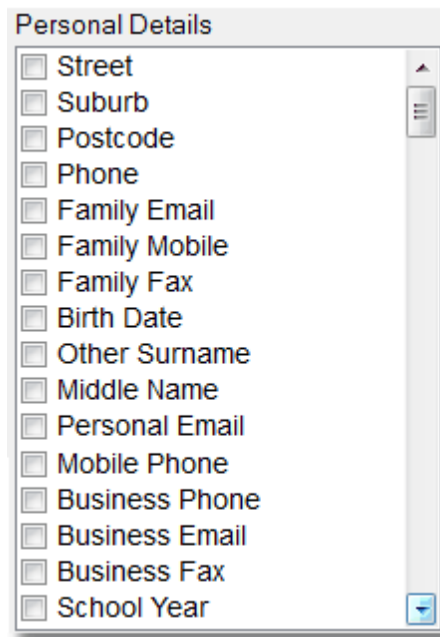


Click below for more information

<p><b>Personal Details</b></p> <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	<p><b>Conditional Flags</b></p> <input type="checkbox"/> Risk <input type="checkbox"/> Status <input type="checkbox"/> Review	<p><b>Procedure</b></p> <input type="checkbox"/> Certificate Received <input type="checkbox"/> Interview Completed <input type="checkbox"/> Police Check Done
<p><b>Events</b></p> <input type="checkbox"/> Expiry Date of Compliance	<p><b>Comments</b></p> <input type="checkbox"/> Compliance Receipt Number	<p><b>Include Details</b></p> <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.

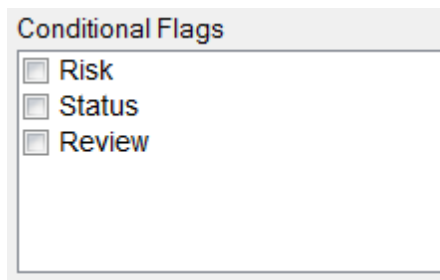
(Note, this list is shown expanded to include all options without scrolling)



A screenshot of a software window titled "Personal Details". It contains a list of 17 items, each with an unchecked checkbox to its left. The items are: 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, and School Year. The window has a standard scrollbar on the right side.

- 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

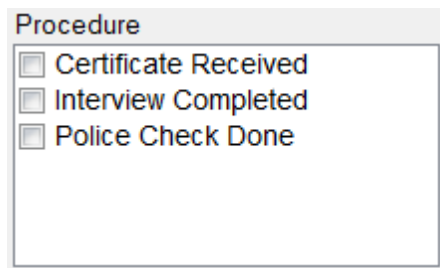
Choose to display any of the following condition flags on the report.



A screenshot of a software window titled "Conditional Flags". It contains a list of three items, each with an unchecked checkbox to its left: Risk, Status, and Review. The window has a standard scrollbar on the right side.

- Risk
- Status
- Review

Tick any of the Procedure options that you want to output to the report.



A screenshot of a software window titled "Procedure". It contains a list of three items, each with an unchecked checkbox to its left: Certificate Received, Interview Completed, and Police Check Done. The window has a standard scrollbar on the right side.

- 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 Child Safe Report with many of the Child Safe fields ticked for inclusion on this report.

### Child Safe Report

---

<b>Allwright</b>	Stephen 11 Blackdog Road Riddells Creek 3412 VIC	054-33-5478
	<b>Risk Rating :</b> Medium	
	<b>Current Status :</b> Current	
	<input checked="" type="checkbox"/> Certificate Received	
<b>Notes:</b>	This is where notes about an individuals compliance can be stored	
<b>Application #1</b>	<b>Recieved:</b> 28/09/2012	<b>Approval:</b> Yes
	<b>Approved By:</b> Stephen	
	<b>Notes:</b> This is where notes about an application can be stored	
<b>Referee #1</b>	<b>Recieved:</b> 01/01/2013	
	<b>Given Name:</b> Stephen	
	<b>Surname:</b> Hickingbotham	
	<b>Phone:</b> 0358111111	
	<b>Address:</b> 5 Spirit Drive Mansfield 3377	
	<b>Notes:</b> This is where notes about a Referee can be stored	
<b>Incident #1</b>	<b>Incident Date:</b> 01/01/2008	<b>Incident Time:</b> 10:00AM
	<b>Recorded Date:</b> 02/01/2008	<b>Recorded Time:</b> 11:00AM
	<b>Incident Status:</b> Under Investigation	
	<b>Recorded By:</b> Stephen	
	<b>Investigated By:</b> Cathy Hickingbotham	
	<b>Incident Reported:</b> This is where the actual incident is recorded	
	<b>People Involved:</b> This is where the people involved are recorded	
	<b>Conclusion:</b> This is where the conclusion to the incident is recorded	

---

054-22-1199

## Pre-Flight

The Pre-Flight options for the "Build Child Safe Column Report" is shown below.



Click on each option on the sample screen below to learn more about these options.

Child Safe Column Report Setup

Compliance Type  
Blue Card

Enable Child Safe Filters


Risk Rating  
No Selection

Current Status  
No Selection

Review  
No Selection

Incident Status  
No Selection

Procedure  
 Certificate Received  
 Interview Completed  
 Police Check Done

Date Filter  26

---

Child Safe 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  
Portrait Two Column

Use Small Font Size  
 Use Arial Narrow Font

Allow Hidden Surnames

Help ? Cancel  Continue 

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

Tick this option to enable all Child Safe 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 Child Safe 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 Child Safe risk rating of Low

See [Risk Rating](#) for more information on Risk Rating Definition.



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

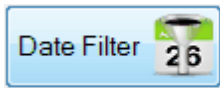
Select a Review option to find all people who's Review is up to certain stage. For example to find all people with a review of "Under Review" select that stage from this list.

See [Review](#) for information on the definition of Review

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 Child Safe record.




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.

Child Safe Date Filters


Activate Application Date Filtering

Friday . 6 November 2015  ▼


To

Friday . 6 November 2015  ▼


Activate Referee Date Filtering

Friday . 6 November 2015  ▼


To

Friday . 6 November 2015  ▼


Activate Incident Date Filtering

Friday . 6 November 2015  ▼


To


Friday . 6 November 2015  ▼

Activate Event Date Filtering

Friday . 6 November 2015  ▼

To

Friday . 6 November 2015  ▼

[Close](#) 

Select the Child Safe components (fields / information) that you want to include on your report.

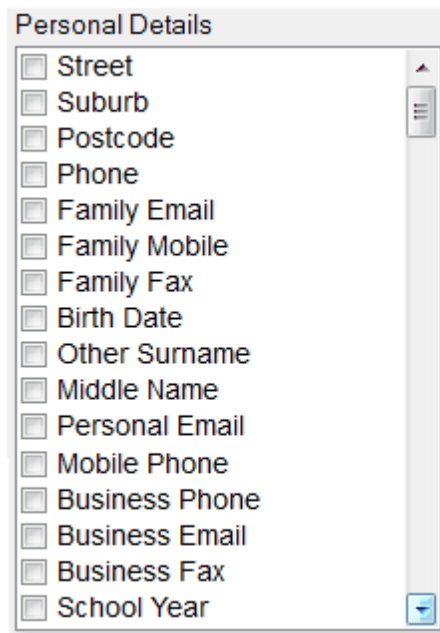


Click below for more information

<p><b>Personal Details</b></p> <p><input type="checkbox"/> Street</p> <p><input type="checkbox"/> Suburb</p> <p><input type="checkbox"/> Postcode</p> <p><input type="checkbox"/> Phone</p> <p><input type="checkbox"/> Family Email</p> <p><input type="checkbox"/> Family Mobile</p>	<p><b>Conditional Flags</b></p> <p><input type="checkbox"/> Risk</p> <p><input type="checkbox"/> Status</p> <p><input type="checkbox"/> Review</p>	<p><b>Procedure</b></p> <p><input type="checkbox"/> Certificate Received</p> <p><input type="checkbox"/> Interview Completed</p> <p><input type="checkbox"/> Police Check Done</p>
<p><b>Events</b></p> <p><input type="checkbox"/> Expiry Date of Compliance</p>	<p><b>Comments</b></p> <p><input type="checkbox"/> Compliance Receipt Number</p>	<p><b>Columns to Display</b></p> <p>Portrait Five Column ▼</p> <p><input checked="" type="checkbox"/> Use Small Font Size</p> <p><input checked="" type="checkbox"/> Use Arial Narrow Font</p>

Tick any of the personal details available to include on your report.

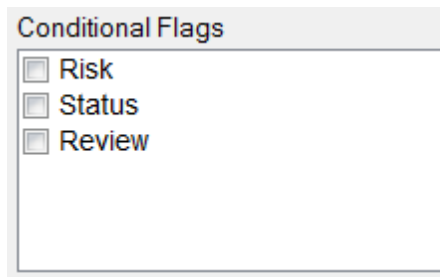
(Note, this list is shown expanded to include all options without scrolling)



A screenshot of a software window titled "Personal Details". It contains a list of 17 items, each with an unchecked checkbox to its left. The items are: 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, and School Year. A vertical scrollbar is visible on the right side of the list.

- 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

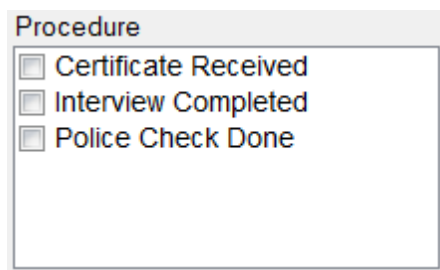
Choose to display any of the following condition flags on the report.



A screenshot of a software window titled "Conditional Flags". It contains a list of three items, each with an unchecked checkbox to its left: Risk, Status, and Review.

- Risk
- Status
- Review

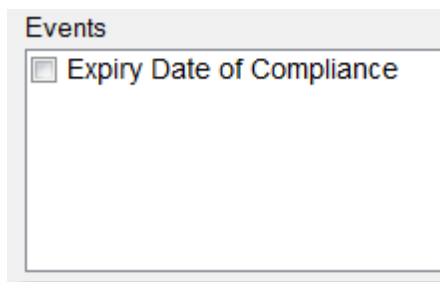
Tick any of the Procedure options that you want to output to the report.



A screenshot of a software window titled "Procedure". It contains a list of three items, each with an unchecked checkbox to its left: Certificate Received, Interview Completed, and Police Check Done.

- Certificate Received
- Interview Completed
- Police Check Done

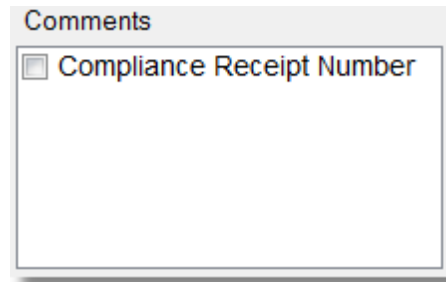
Tick any of the Events that you want to include on the report.



A screenshot of a software window titled "Events". It contains a list of one item, with an unchecked checkbox to its left: Expiry Date of Compliance.

- Expiry Date of Compliance

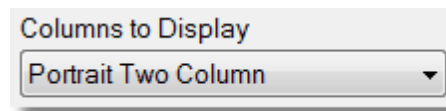
Tick any of the Comments that you want to include on the report.



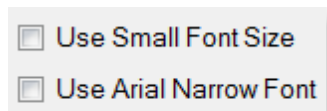
The following page options are available for the Column Report.

[Columns to display](#) and [Font Options](#)

Choose Portrait or Landscape orientation, and the number of columns needed to display the number of [Child Safe Components to include...](#)



To assist in fitting information on the page, the following options are available for the Column Report.

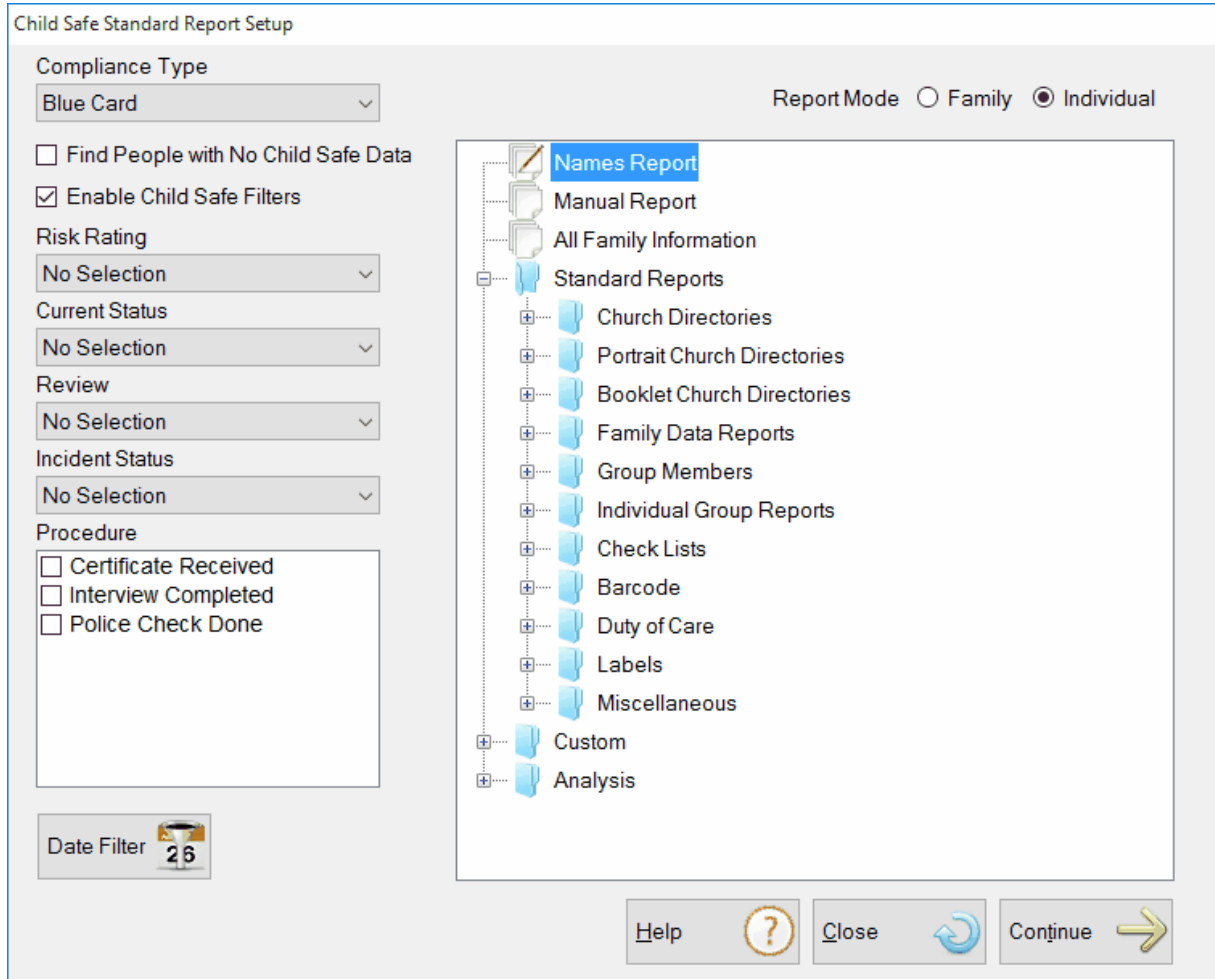


### **Build Child Safe Column Report**

The Child Safe 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 Child Safe Filters, the fields you want to display and some page formatting options to design the report.

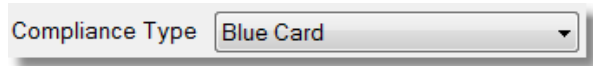
**Pre-Flight**

The Pre-Flight options for Pastoral Care Standard Reports in Child Safe are shown below. Click on each area for more information.



**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.



**Find People with No Child Safe Data**

Find People with No Child Safe Data

Tick this option to output a selected report on people that have NO child safe data.

This could be very useful to say run a report filtered for all people involved in Kids Ministries, and output people that have no child safe data. These people would need follow up to be sure that they have the requisite

paperwork and authority to work with children.

### Status Filters

Select any of the status type of filters to find people by

Select a Risk Rating to find all people of a certain risk rating. For example, select Low to find all people with a Child Safe risk rating of Low

See [Risk Rating](#) for more information on Risk Rating Definition.

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

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

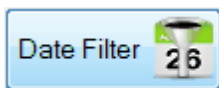
Select a Incident Status option to find all people who's Incident Status matches your selection. For example to find all people with an Incident Status of "Under Investigation" select that status from this list

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 Child Safe record.

### 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.

Child Safe Date Filters

Activate Application Date Filtering

Friday . 6 November 2015 [calendar icon] ▼  
To  
Friday . 6 November 2015 [calendar icon] ▼

Activate Referee Date Filtering

Friday . 6 November 2015 [calendar icon] ▼  
To  
Friday . 6 November 2015 [calendar icon] ▼

Activate Incident Date Filtering

Friday . 6 November 2015 [calendar icon] ▼  
To  
Friday . 6 November 2015 [calendar icon] ▼

Activate Event Date Filtering

Friday . 6 November 2015 [calendar icon] ▼  
To  
Friday . 6 November 2015 [calendar icon] ▼

Close

**Report Mode**

Choose Family or Individual Mode for any selected report. Note, for Child Safe, the most sensible options are Individual mode options, as Child Safe deals with people as individuals, not as a family.

Report Mode  Family  Individual

**Reports List**

Select any standard Pastoral Care report from the list of available reports. This includes Custom Reports, Directories, Letters, Templates etc.

**Sample Report**

Shown below is a Portrait 5 column report. Note, the number of columns does not include the Name Column. Bu Default, the Name column is included and cannot be turned off or modified.

Child Safe Column Report

	Personal Email	Mobile Phone	Status	Expiry Date of	Compliance
Allwright Stephen	stephen@spit.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 Child Safe, the Child Safe area allows you to also combine filters for Child Safe 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.

### Export Child Safe Data

The Export Child Safe Data option lets you to select different Child Safe data areas to include in an export file. Ticking all options will give you a really thorough "All Information" output on each person who has any Child Safe records.

### Pre-Flight



The Pre-Flight options for the "Build Child Safe Reports" report is shown below. Click on each option on the sample screen below to learn more about these options.



**Child Safe Column Report Setup**

Compliance Type  
Blue Card

Enable Child Safe Filters

Risk Rating  
No Selection

Current Status  
No Selection

Review  
No Selection

Incident Status  
No Selection

Procedure  
 Certificate Received  
 Interview Completed  
 Police Check Done

Date Filter 26

---

Child Safe components to include in export file..

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

Help ? Close Export

### 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 Child Safe Filters

Tick this option to enable all Child Safe 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 Child Safe Filters

Select any of the status type of filters to find people by

Select a Risk Rating to find all people of a certain risk rating. For example, select Low to find all people with a Child Safe risk rating of Low

See [Risk Rating](#) for more information on Risk Rating Definition.

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

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

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 Child Safe record.




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.

Child Safe Date Filters

<input type="checkbox"/> Activate Application Date Filtering	<input type="checkbox"/> Activate Referee Date Filtering
Friday . 6 November 2015  To Friday . 6 November 2015 	Friday . 6 November 2015  To Friday . 6 November 2015 
<input type="checkbox"/> Activate Incident Date Filtering	<input type="checkbox"/> Activate Event Date Filtering
Friday . 6 November 2015  To Friday . 6 November 2015 	Friday . 6 November 2015  To Friday . 6 November 2015 



Select the Child Safe components (fields / information) that you want to include on your report.

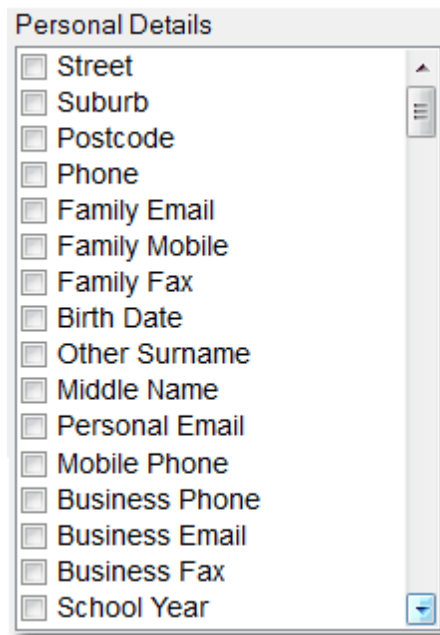


Click below for more information

<p><b>Personal Details</b></p> <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	<p><b>Conditional Flags</b></p> <input type="checkbox"/> Risk <input type="checkbox"/> Status <input type="checkbox"/> Review	<p><b>Procedure</b></p> <input type="checkbox"/> Certificate Received <input type="checkbox"/> Interview Completed <input type="checkbox"/> Police Check Done
<p><b>Events</b></p> <input type="checkbox"/> Expiry Date of Compliance	<p><b>Comments</b></p> <input type="checkbox"/> Compliance Receipt Number	<p><b>Format</b></p> <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

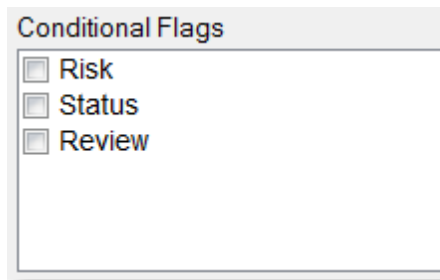
Tick any of the personal details available to include on your Export.

(Note, this list is shown expanded to include all options without scrolling)



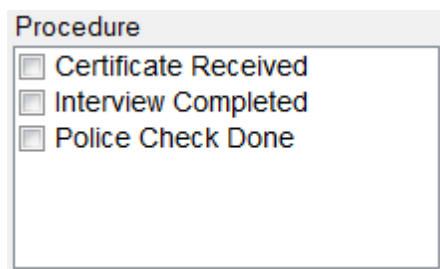
A screenshot of a software window titled "Personal Details". It contains a list of 16 items, each with an unchecked checkbox to its left. The items are: Street, Suburb, Postcode, Phone, Family Email, Family Mobile, Family Fax, Birth Date, Other Surname, Middle Name, Personal Email, Mobile Phone, Business Phone, Business Email, Business Fax, and School Year. The window has a scroll bar on the right side.

Choose to display any of the following condition flags in the export file.



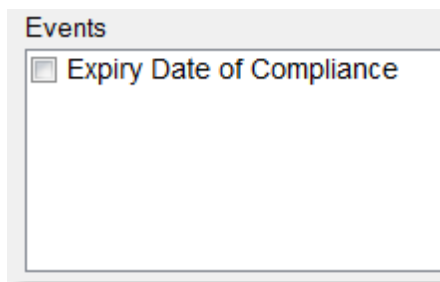
A screenshot of a software window titled "Conditional Flags". It contains a list of three items, each with an unchecked checkbox to its left: Risk, Status, and Review.

Tick any of the Procedure options that you want to include in the export file.



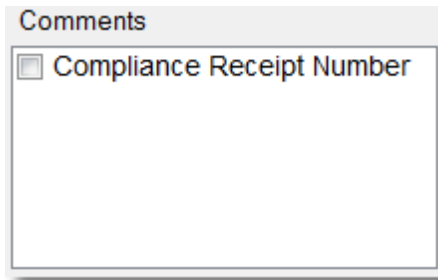
A screenshot of a software window titled "Procedure". It contains a list of three items, each with an unchecked checkbox to its left: Certificate Received, Interview Completed, and Police Check Done.

Tick any of the Events that you want to include in the export file.

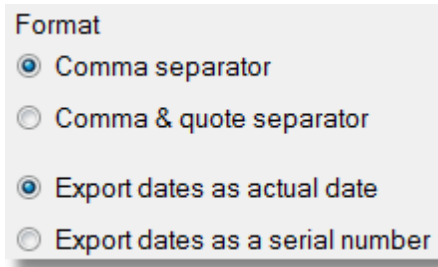


A screenshot of a software window titled "Events". It contains a list of one item, "Expiry Date of Compliance", with an unchecked checkbox to its left.

Tick any of the Comments that you want to include in the export file.

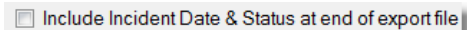


Select the format option for the text file output that you want to use. For best reliability in excel, select Comma and Quote Separator, and Export Dates as a serial number.



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.



## Add / Edit Records

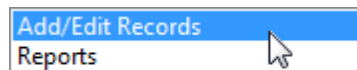
The Child Safe area of Add / Edit Records is the area that you can record information against individuals that you are interested in for Working With Children legislation. Information such as but not limited to:

- 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

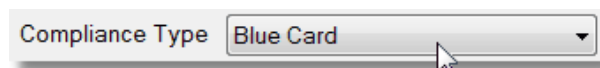
## Adding a Record

Follow these simple steps to Add or Edit a record in Child Safe.

**Step 1** Select Add Edit Records from the menu list in Child Safe

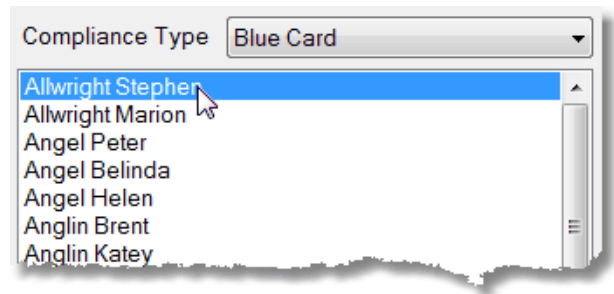


**Step 2** Select the Compliance Type from the Compliance Type selection list. In most cases, your church will only have one compliance type to work with.



**Step 3** Use the Load options to load in people See [Load](#) that you want to work on

- Step 4** Select a person from the list of people loaded that you wish to edit or add information to



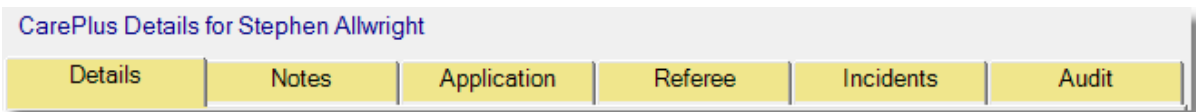
- Step 5** Make the changes to each or any of the areas listed below for the selected person.

## Areas for Editing and Adding information to



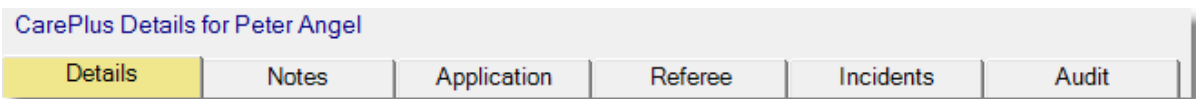
Shown below are the 6 area tabs for adding information to. Note that the selected person's name is above the tabs.

Click on each tab below for full details of each of these 6 areas.



## 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.



## 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 Child Safe 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 Child Safe 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 Child Safe program. You can setup your own Review categories in the Child Safe 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 Child Safe 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 Child Safe 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 Child Safe setup area under [Comments](#)

### Details Window



Click on each part of this window for more information on each section of the Child Safe 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 Rating

Risk Ratings are a rating you give to a person that your Child Safe Team, or leadership team has assigned to a person who has applied for a position to work in children's ministry. 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 Child Safe 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)

Notes

This is where notes about an individuals compliance can be stored

### 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.

Application

Received Date

Approved By  Approval

Notes

**Edit / New**

Make and changes to the selected Application Record, or Fill in all details if you are creating a NEW application record.

Child Safe Application X

Received Date

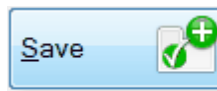
Approval

Approved By

Notes



Delete an application record by pressing the Delete Button.



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.

Referee

Referee Date

Given Name  Surname

Phone

Address

Notes

## Edit / New

Child Safe Referee

Referee Date

Given Name  Surname

Phone

Address

Notes

Make any 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 Child Safe 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 type="text" value="This is where the actual incident is recorded"/>		
People Involved	<input type="text" value="This is where the people involved are recorded"/>		
Conclusion	<input type="text" value="This is where the conclusion to the incident is recorded"/>		

**Edit / New**

Child Safe Referee
✕

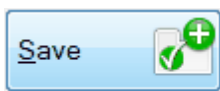
Incident Date	Friday . 1 January 2016	Incident Time	9.30am
Recorded Date	Friday . 1 January 2016	Recorded Time	10.15am
Incident Status	Under Investigation		
Recorded By	Stephen		
Investigated By	Jenny Baker		
Incident Reported	Yes, has been reported and recorded hear when report (verbal) was received		
People Involved	Child : Jane Sumner, Parent Grant Sumner, Teacher Larry Goodwin		
Conclusion	No Conclusion yet, still investigating		

Help 
Cancel 
Delete 
Save

Make any 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.

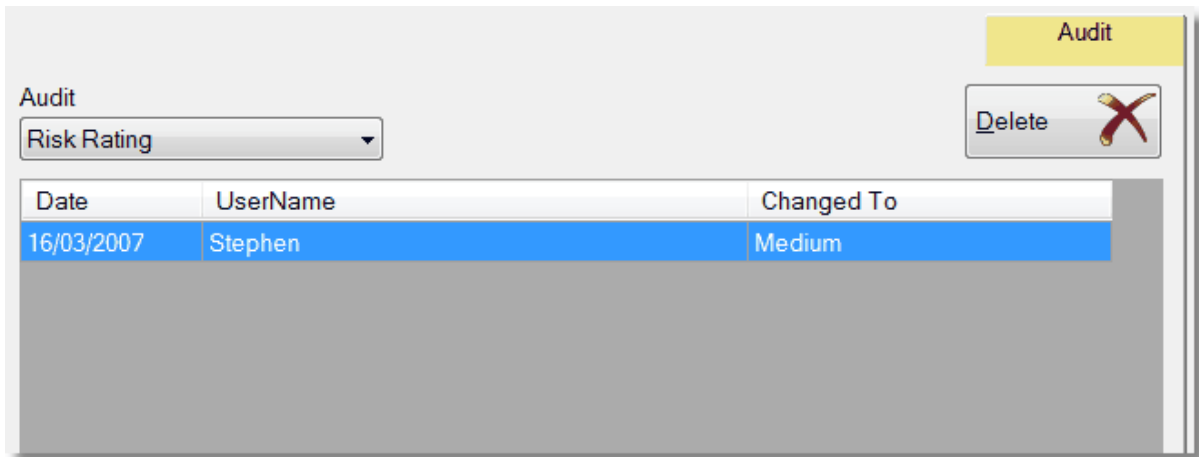


Press Save to save any changes made to this record

**Audit**

As information is added to Child Safe, or Edited, Pastoral Care saves and keeps an Audit Trail of these changes. If permission is given in the Child Safe 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.

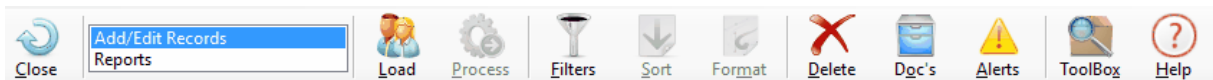


## Child Safe Toolbar

The Child Safe toolbar is shown below.



Click on each area for more information.

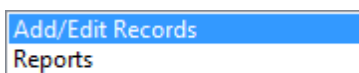


### Close



Exit the Child Safe area. All changes will be saved automatically.

### Menu List



Choose to either Add / Edit Child Safe records, or run Child Safe Reports.

See [Add / Edit Records](#) and [Child Safe Reports](#) for more information on each area.

### Load



Press the Load button to load in selected people into Child Safe. 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 Child Safe 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 Child Safe against their name. This option is ideal for regular maintenance and reviewing of people with a Child Safe records.

## Find People with Conditional Flags

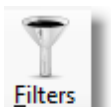
The sample window above shows us about to load in all people with a status of Exempt. And of the Risk, Status and Review options can be used for filtering under the selection of Conditional Flags.

## Process



Press the Process button to run a selected report.

## Filters



Use any of the standard Pastoral Care [Filters](#) to restrict people loading into Child Safe, or being outputted to and of the [Child Safe Reports](#).

## Sort



Use any of the standard Pastoral Care [Sort](#) options for some of the Child Safe reporting options.

## Format





Use the standard Pastoral Care report [Format](#) options in some of the Child Safe reports.

### Delete



Delete all Child Safe records for the selected person.

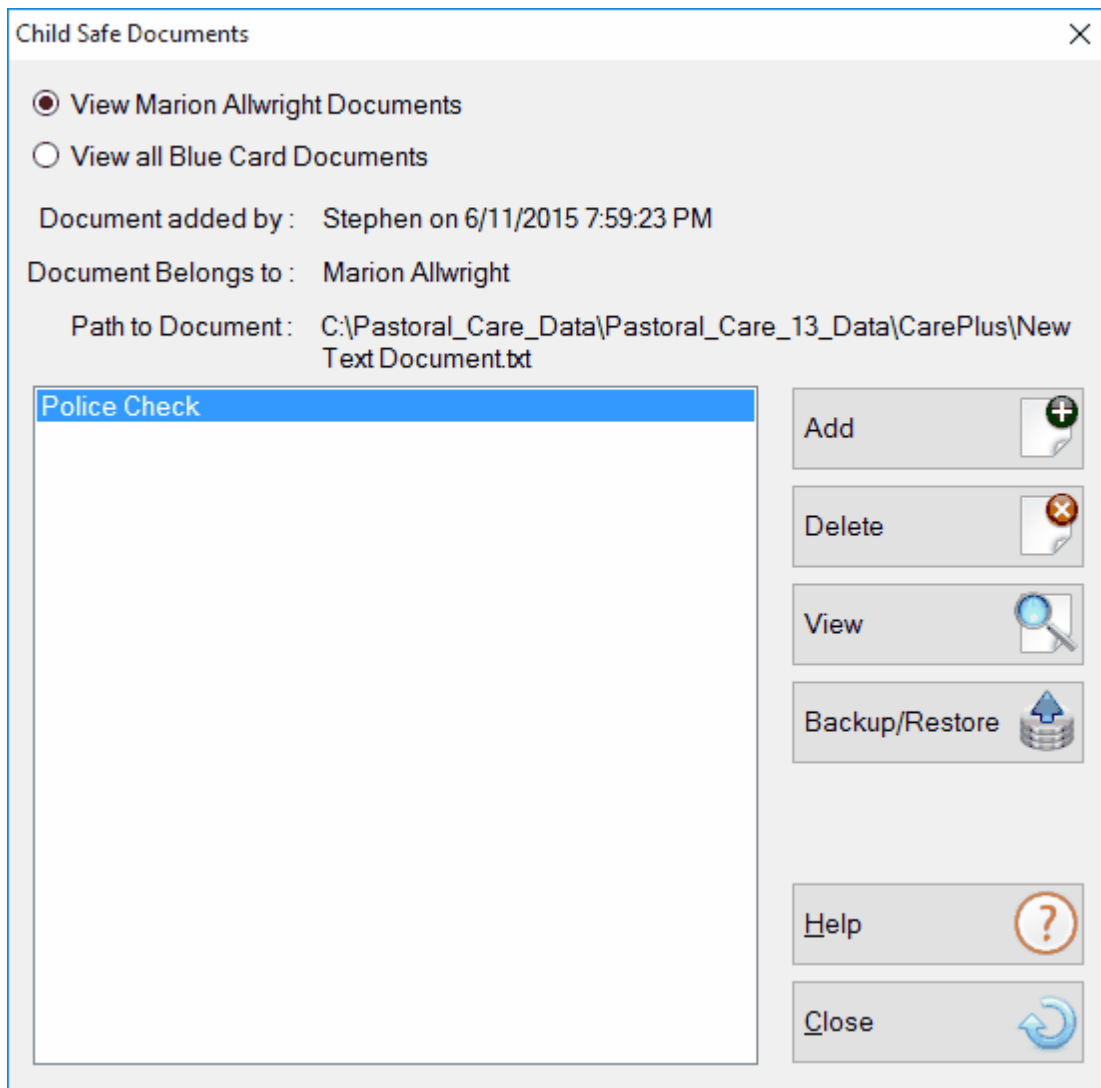
### Doc's



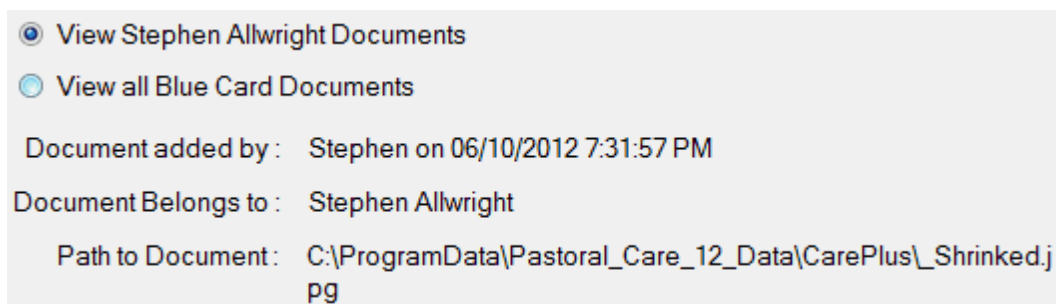
The Doc's (short for Documents) allows you to add supporting documents to a person's individual Child Safe records.



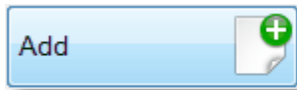
Click on each area below to learn more about the Doc's feature.



### Document View Options



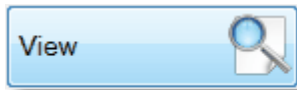
Choose to see a list of all documents, or only those for the currently selected person. Note the Path to Document. When a document is saved to Child Safe, the original file is left in its original location, and a copy of it is made in the Pastoral Care data path.

**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 Child Safe are not backed up by the Pastoral Care backup utility. Please use this Backup feature to backup your Documents into a single file.

**Alerts**

The Child Safe 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. This used to be called Schedule in Pastoral Care 12 and older versions of "CarePlus". Since renaming CarePlus as Child Safe, we have renamed this area Alerts, and increased its functionality.

**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!

Child Safe Alerts

Compliance Type  
Blue Card

Event  
Expiry Date of Compliance

Display Alert WITH names  
 Display Alert WITHOUT names

Display Alert within...  
7 Days of expiry

**Active Alerts**

Compliance Type	Event	Alert	Display Names
Blue Card	Expiry Date of Compliance	20	Yes

Add → Alerts are notified when Pastoral Care starts up and are then displayed in the Alerts area within the Dashboard.

Remove ←

Help ? Close ↻

## Toolbox



Use the standard Pastoral Care [Toolbox](#) for quick access to useful areas.

## Library Manager

### 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

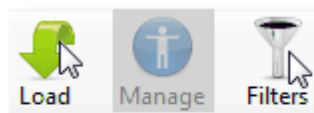
Some things the Library Manager can be used for:

- 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

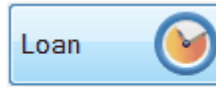
- Step 2** Select a person from the loaded list who wants to borrow an asset.



- 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



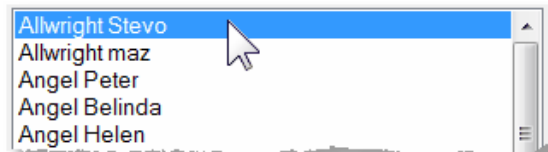
### How to Accept a Returned Asset

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](#)

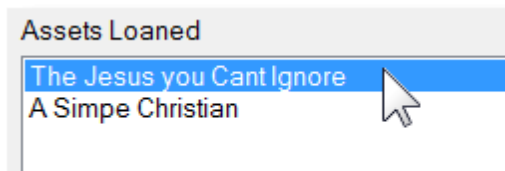
- Step 1** Press [Load](#) on the Library Toolbar to load in all people **with assets on loan**.



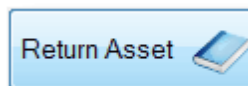
- Step 2** Select a person from the loaded list who wants to return an asset.



- 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 LOAD on the toolbar if you are in a new session, and then 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  Import 

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

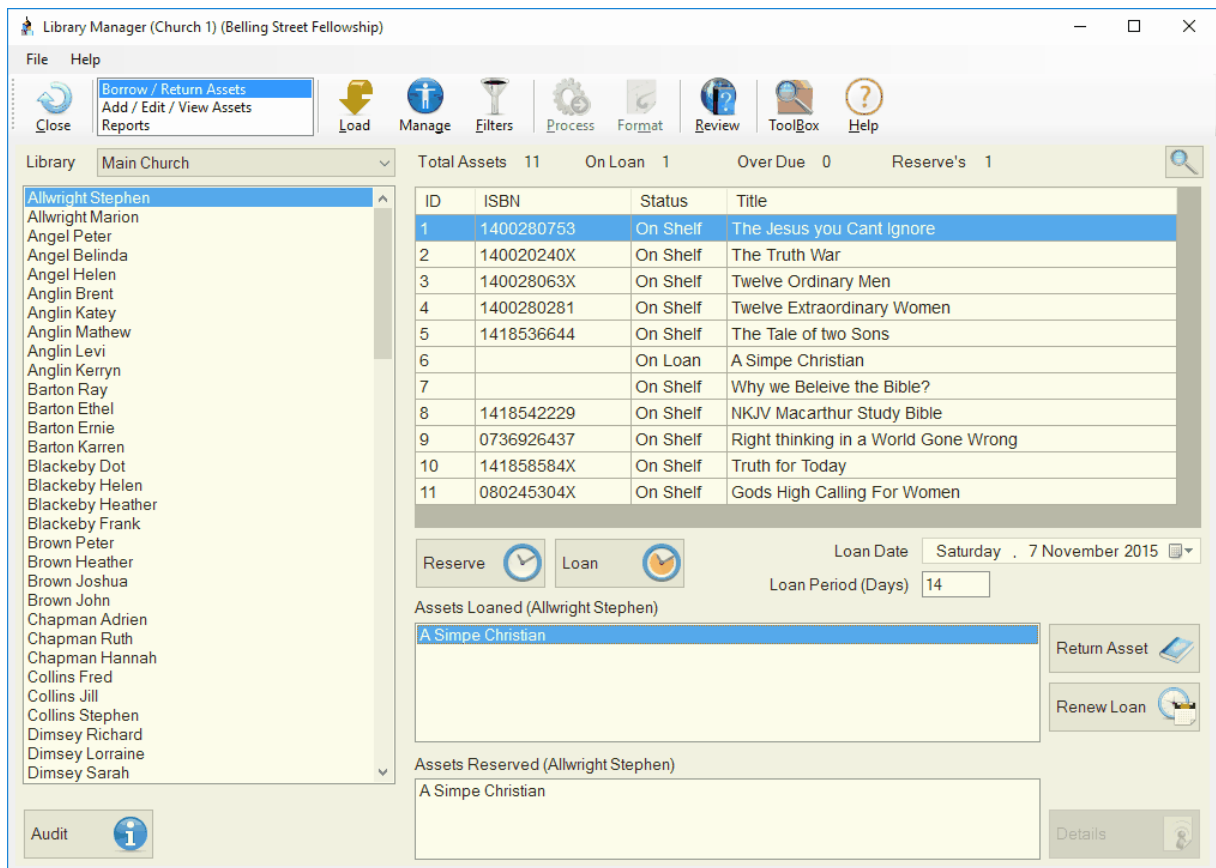
## The Main Window

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. The area that is shaded yellow is detailed [Here](#)



## Toolbar

The following buttons are on the Library Toolbar.



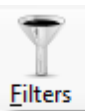
Load

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.



Manage

Manage the Library with more advanced options including the use of Bar Code scanners. See [Manage](#) for full details



Filters

Use standard Pastoral Care [Filters](#) for effecting who you load into the Library Program.



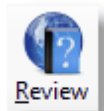
Process

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.

**Load Options**

<p><b>People To Load...</b></p> <p><input checked="" type="radio"/> Load All People</p> <p><input type="radio"/> Load All People with Assets on Loan</p> <p><input type="radio"/> Load All People with Assets Overdue</p> <p><input type="radio"/> Load All People with Assets Reserved</p>	<p><b>Assets To Load...</b></p> <div style="border: 1px solid gray; padding: 5px; min-height: 100px;"> <p><input checked="" type="checkbox"/> Book</p> <p><input checked="" type="checkbox"/> DVD</p> <p><input checked="" type="checkbox"/> Magazine</p> </div>
---	--

Help ?
Cancel ↶
Asset Filters 🍷
Load ↴

## 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

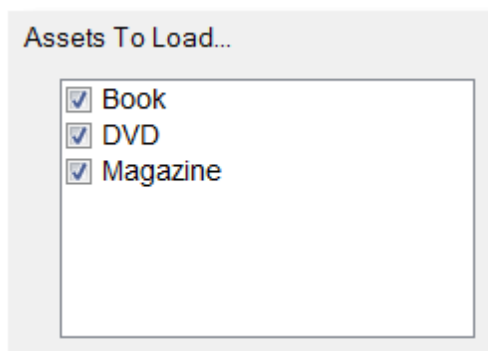
Select this option if you want to review people who have overdue Assets out on loan. This can also be affected by using Pastoral Care [Filters](#) to restrict this load to All people matching a filter who also have Assets overdue.

Load All People with Assets Reserved

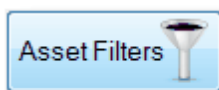
Select this option if you want to review people who have Assets on reserve. This can also be affected by using Pastoral Care [Filters](#) to restrict this load to All people matching a filter who also have Assets on reserve.

### 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.

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.

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.

Filter on any of the Asset Details available. See [Title](#), [Author](#), [Comment](#), and [ISBN](#)

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. 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".

Title

The filters do not automatically ignore your spelling mistakes, for example Women of Fith will probably not find any assets!

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. The example above will find all assets with a name of Charles Pickering.

Author

The filters do not automatically ignore your spelling mistakes, if you mis-type a search item, Pastoral Care will look for it!

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. 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 EasyRead in the comments.

Comment

The filters do not automatically ignore your spelling mistakes, if you mis-type a search item, Pastoral Care will look for it!

Filter for part of or all of an ISBN Number.

ISBN

Choose to look for a Primary Asset, a Copy, or both



Asset Type  Primary & Copy  Primary  Copy

Use the Added Date filter to locate assets added to your Library within a selected date range.

Filter on Added 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 

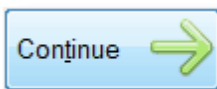
Use the Assets Loaned Date filter to locate assets that were loaned out within a selected date range.

Filter on Assets Loaned Date

19/01/2013  To 19/01/2013 

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

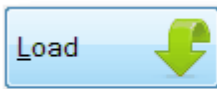


Complete the filter form and do the Load based on your selected filters.



Reset all filters on this window, letting you load in all assets.

### Load



Press this button to load the Assets / People selected into the Library Manager.

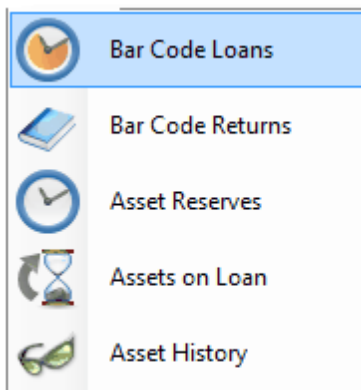
### Manage



The Manage Button on the toolbar has the following additional selections to choose from...

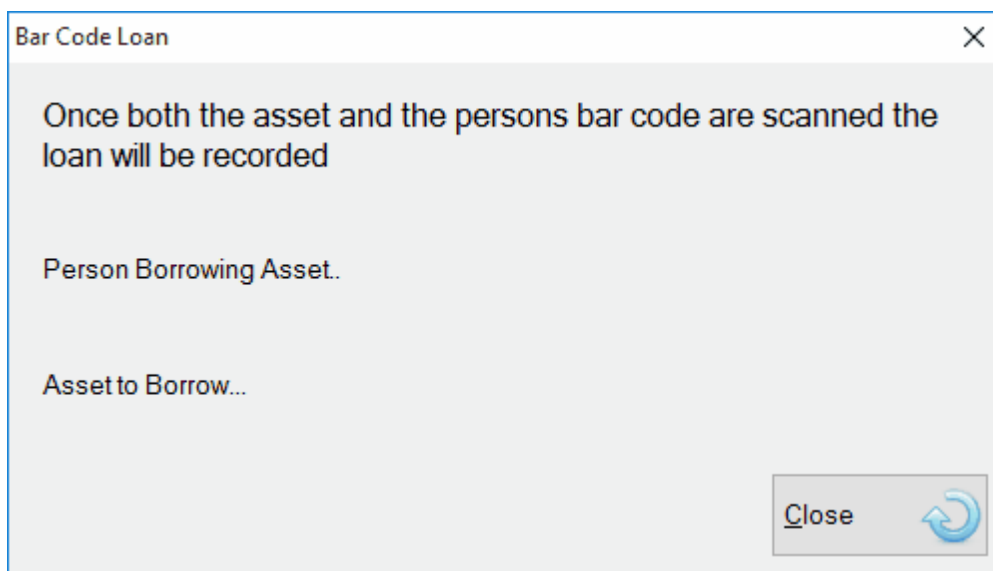


Click on each option for more details on each.



### 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.

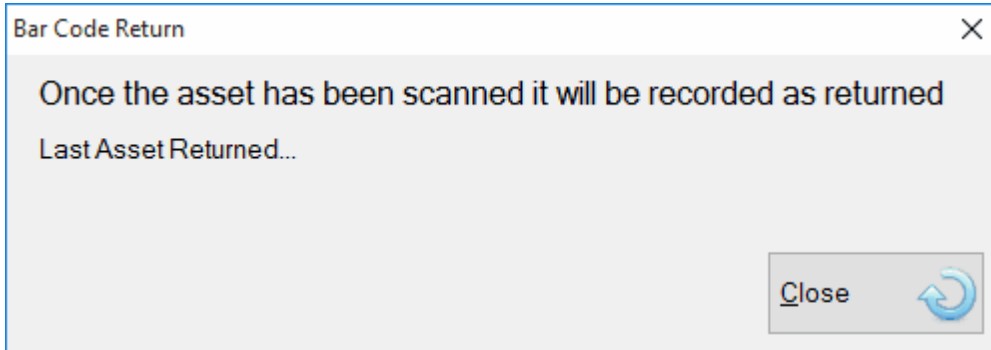


Simply Scan the members Bar Code, and the Asset Bar code to complete the loan record.

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

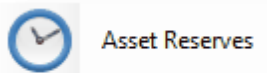
This is a simple method to use for recording a loan. You will need a an Asset Bar Code on the Asset to complete a return.



Simply Scan the Asset Bar code to complete the asset return procedure.

See [Assets Barcode](#) for information on generating Bar Codes for Assets.

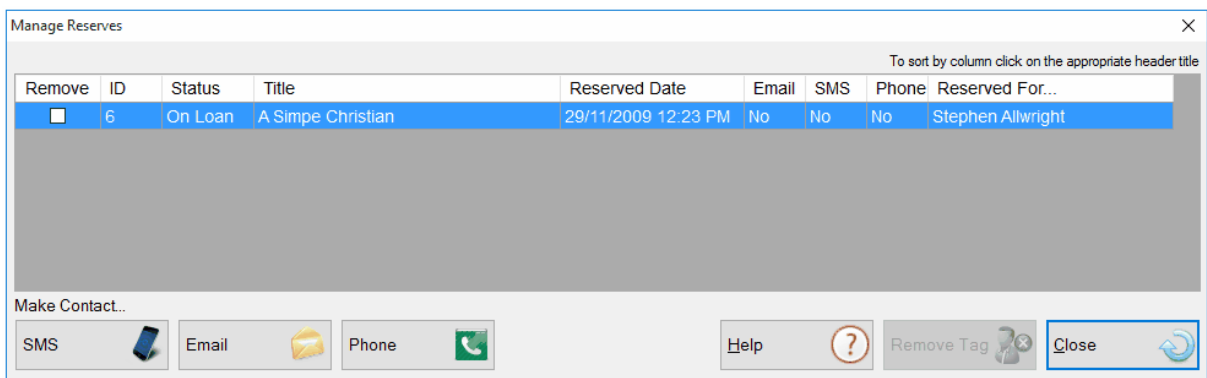
## Asset Reserves



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 cannot notify people immediately.



Click on each part of this window to learn more.



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.

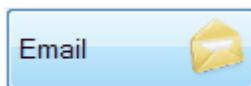


Pressing the SMS button will start a process to send a reminder text message to the selected person in the [Reserve List](#). You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose SMS Message. See [SMS](#) for more information on this area.

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

 A screenshot of a software dialog box titled 'Contacting Stephen Allwright about A Simpe Christian'. The dialog has a toolbar with icons for 'Close', 'Select Phone Numbers', 'Compose SMS Message', 'Send', 'Tracking', 'Queue', 'Archive', and 'Help'. Below the toolbar are buttons for 'Tag All', 'Untag All', and 'Lists'. A table is displayed with columns: 'Send', 'Type', 'Surname', 'Given', and 'Phone Number'. The table contains three rows of phone numbers for Stephen Allwright. The first row is selected.
 

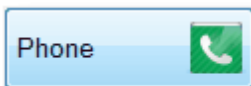
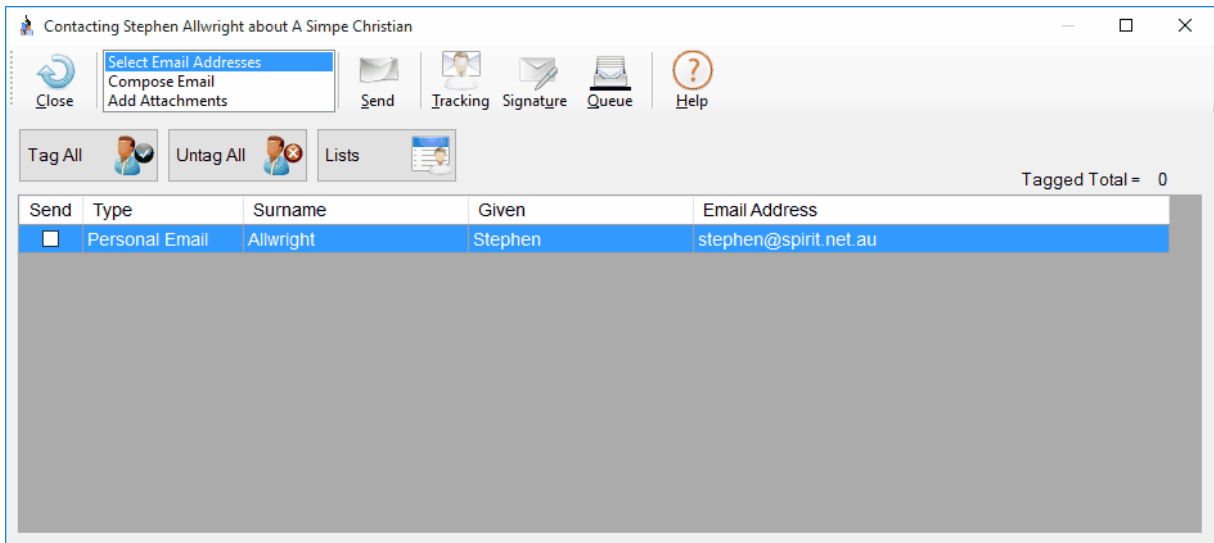
Send	Type	Surname	Given	Phone Number
<input checked="" type="checkbox"/>	Family Phone	Allwright Family		054-33-5478
<input type="checkbox"/>	Personal Mobile	Allwright	Stephen	041234567890
<input type="checkbox"/>	Business Phone	Allwright	Stephen	018-998725



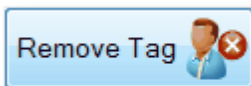
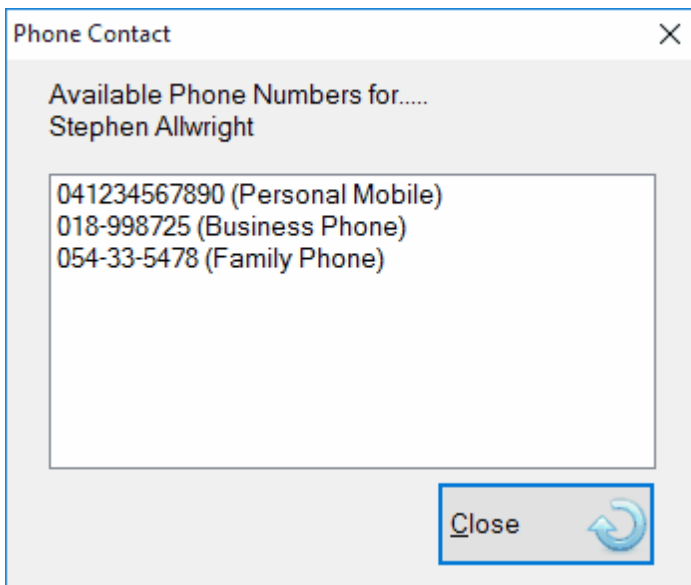
Pressing the Email button will start a process to send a reminder Email message to the selected person in the [Reserve List](#). You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose Email Message. See [Email](#) for more information on this area.

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

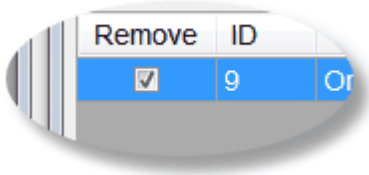




Press the Phone button to show the following window. This displays all available phone numbers for the selected person in the reserve list.



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

Over Due Loaned Assets... To sort by column click on the appropriate header title

ID	ISBN	Title	Borrowed	Due Back	Borrowed By

On Loan...

ID	ISBN	Title	Borrowed	Due Back	Borrowed By
3	140028063X	Twelve Ordinary Men	29/12/2015	12/01/2016	Stephen Allwright
6		A Simpe Christian	14/11/2016	28/11/2016	Stephen Allwright

Make Contact...

SMS Email Phone Help Renew Loan Return Asset Close

This is a list of all assets that are Overdue.

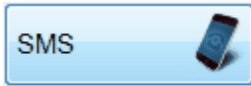
Over Due Loaned Assets... To sort by column click on the appropriate header title

ID	ISBN	Title	Borrowed	Due Back	Borrowed By
6		A Simpe Christian	14/11/2009	28/11/2009	Stevo Allwright

This is a list of all Assets that are currently On Loan.

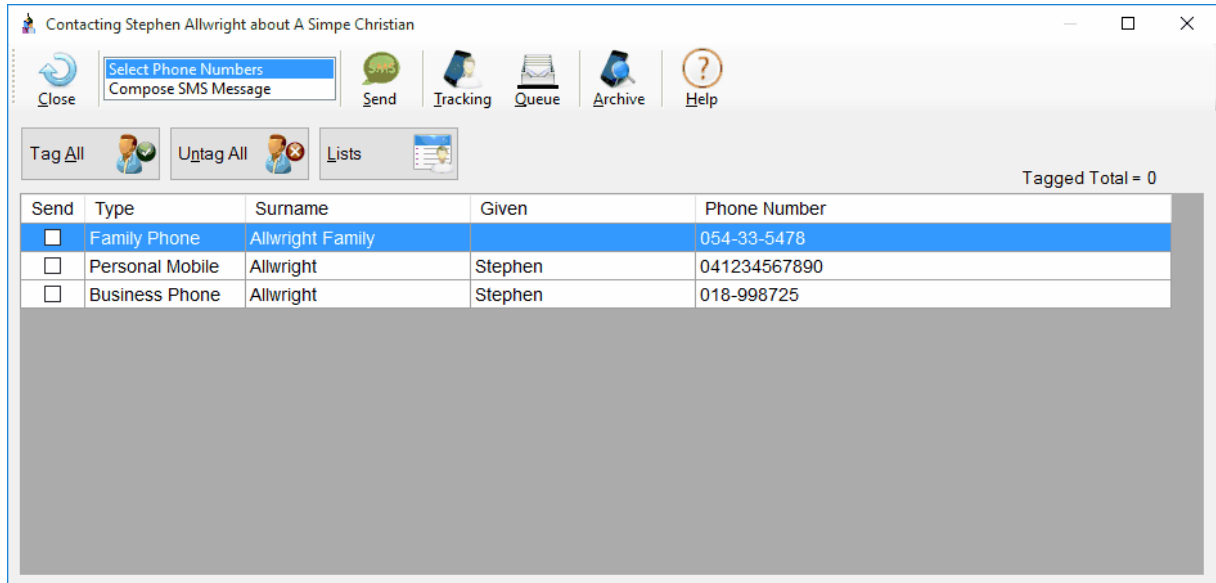
On Loan...

ID	ISBN	Title	Borrowed	Due Back	Borrowed By
1		The Jesus you Cant Ignore	18/01/2013	01/02/2013	Stevo Allwright



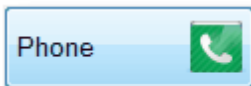
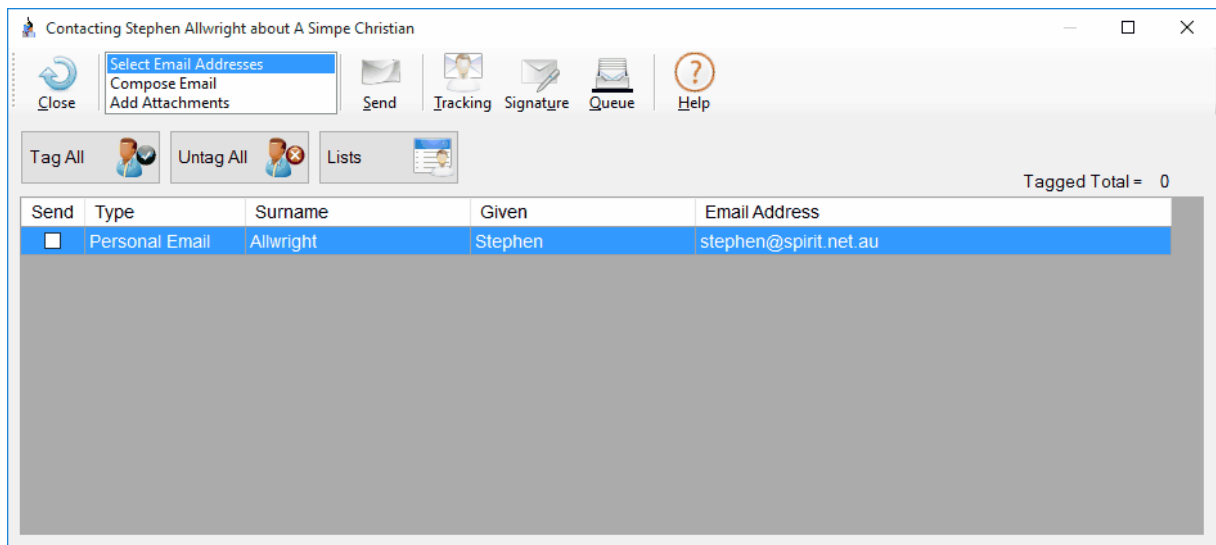
Pressing the SMS button will start a process to send a reminder text message to the selected person. You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose SMS Message. See [SMS](#) for more information on this area.

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.

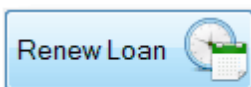
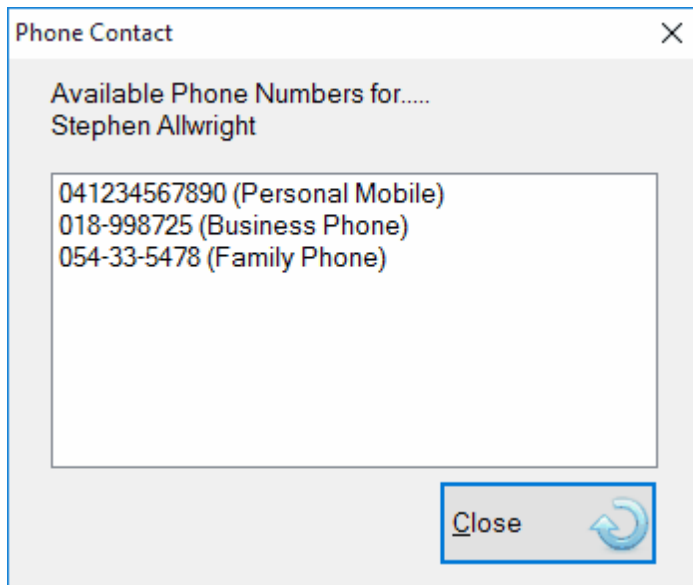


Pressing the Email button will start a process to send an Email message to the selected person. You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose Email Message. See [Email](#) for more information on this area.

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.



Press the Phone button to show the following window. This displays all available phone numbers for the selected person in the reserve list.



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.

Renew Loan



Asset on Loan : A Simpe Christian  
 Asset ID : 1  
 Borrower : Stephen Allwright  
 Date Borrowed : 14/11/2016  
 Borrowed Period (days) : 14  
 Asset Due Back : 28/11/2016

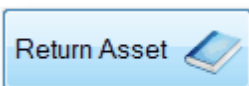
People who have Reserved the Asset

Reserved Date	Email Sent	SMS Sent	Phoned	Person who has Reserved Asset
29/11/2009 12:23 PM	No	No	No	Stephen Allwright

Renew Loan


Loan Date  Loan Period (Days)

Cancel  Renew 



Press the Return Asset button to accept the selected Asset back into the Library.

Pastoral Care 13

 Please confirm that you wish to return the asset 'A Simpe Christian' to 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.

Library Manage History

Enable Borrowed Date Filter

Saturday . 7 November 2015 To Saturday . 7 November 2015 Refresh

To sort by column click on the appropriate header title

Remove	ID	Title	Borrowed	Returned	Period	Borrowed By
<input type="checkbox"/>	11	Gods High Calling For Women	01/09/2016	28/11/2016	89	Stephen Allwright
<input type="checkbox"/>	11	Gods High Calling For Women	01/09/2016	01/01/2016	-243	Stephen Allwright
<input type="checkbox"/>	11	Gods High Calling For Women	01/09/2016	28/11/2016	89	Stephen Allwright

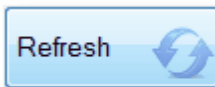
Help Remove Tag Close

Enable Borrowed Date Filter

Sunday .20 January 2013 To Sunday .20 January 2013

Tick this option and set a date range to filter this list on based on the Borrowed Date of an asset.

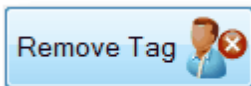
Note: You will need to press the [Refresh](#) button to reload the window with the new filter applied.



Press the Refresh Button to apply a date range filter you have added with the [Enable Date Filter](#) option.

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

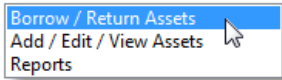


Press this button to clear selected Historical Items from the Library History window.

## 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.

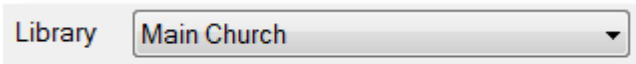


Click on each part of this window to learn more. (Note, for clarity, this window is shown with people and assets already loaded.

The screenshot shows the Library Manager interface for 'Church 1 (Belling Street Fellowship)'. The 'Borrow / Return Assets' menu is open. The main window displays a list of assets with columns for ID, ISBN, Status, and Title. Below the list, there are controls for reserving and loaning assets, including a loan date selector (Saturday, 7 November 2015) and a loan period of 14 days. There are also sections for 'Assets Loaned' and 'Assets Reserved' for the selected person, 'Allwright Stephen'.

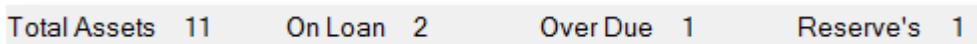
ID	ISBN	Status	Title
8	1418542229	On Shelf	NKJV Macarthur Study Bible
7		On Shelf	Why we Believe the Bible?
1	1400280753	On Shelf	The Jesus you Cant Ignore
2	140020240X	On Shelf	The Truth War
4	1400280281	On Shelf	Twelve Extraordinary Women
5	1418536644	On Shelf	The Tale of two Sons
9	0736926437	On Shelf	Right thinking in a World Gone Wrong
10	141858584X	On Shelf	Truth for Today
3	140028063X	On Shelf	Twelve Ordinary Men

**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 Statistics**



These statistics are accurate for the currently [Selected Library](#)

### Loaded People



Allwright Stevo  
Allwright maz  
Angel Peter  
Angel Belinda  
Angel Helen  
Anglin Brent  
Anglin Katey

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.

### 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. This window is loaded by double clicking on an asset from the main library window.



Click on each part of this window for more information.



Asset History

Title: Twelve Extraordinary Women

Asset Id: 4 Copy Id's: None




History... Total Items: 0 To sort by column click on the appropriate header title




Remove	ID	ISBN	Borrowed	Returned	Period (days)	Borrowed By

Reserved For..... Total Items: 1

Reserved	Email Sent	SMS Sent	Phoned	Name
07/11/2015 05:16 PM	No	No	No	Stephen Allwright

Make Contact...

SMS  Email  Phone 

Help  Remove Tag  Close 

History... Total Items: 1

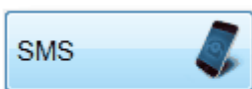
Remove	ID	ISBN	Borrowed	Returned	Period (days)	Borrowed By
<input type="checkbox"/>	1		18/01/2013			Stevo Allwright

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 For..... Total Items: 1

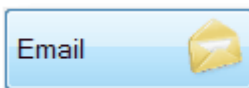
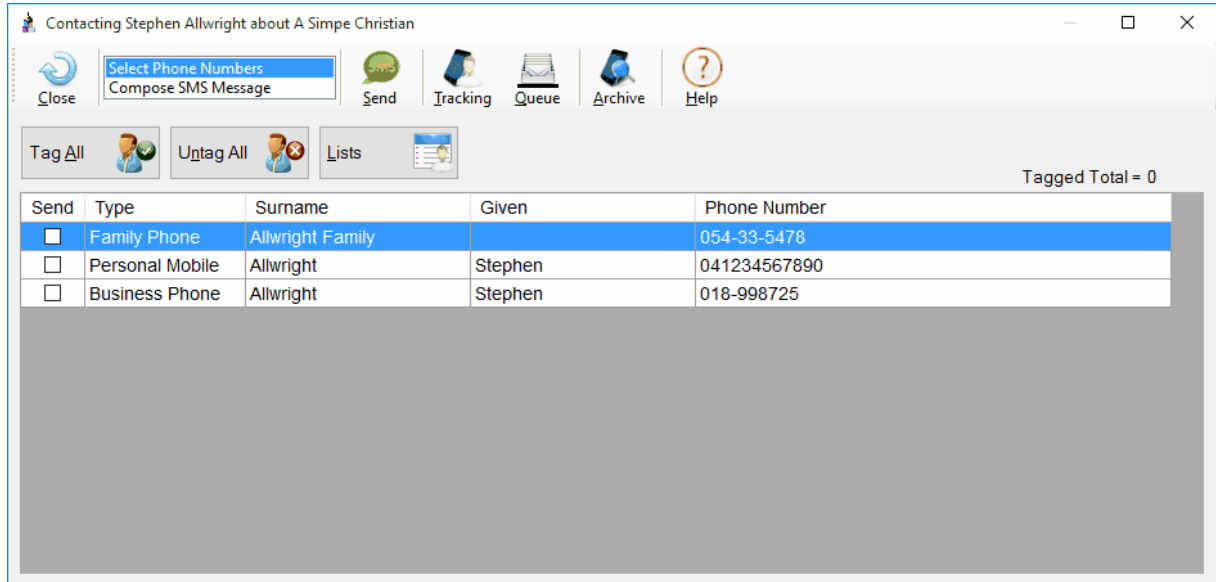
Reserved	Email Sent	SMS Sent	Phoned	Name
20/01/2013 10:54 AM	No	No	No	Big Ray Barton

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.



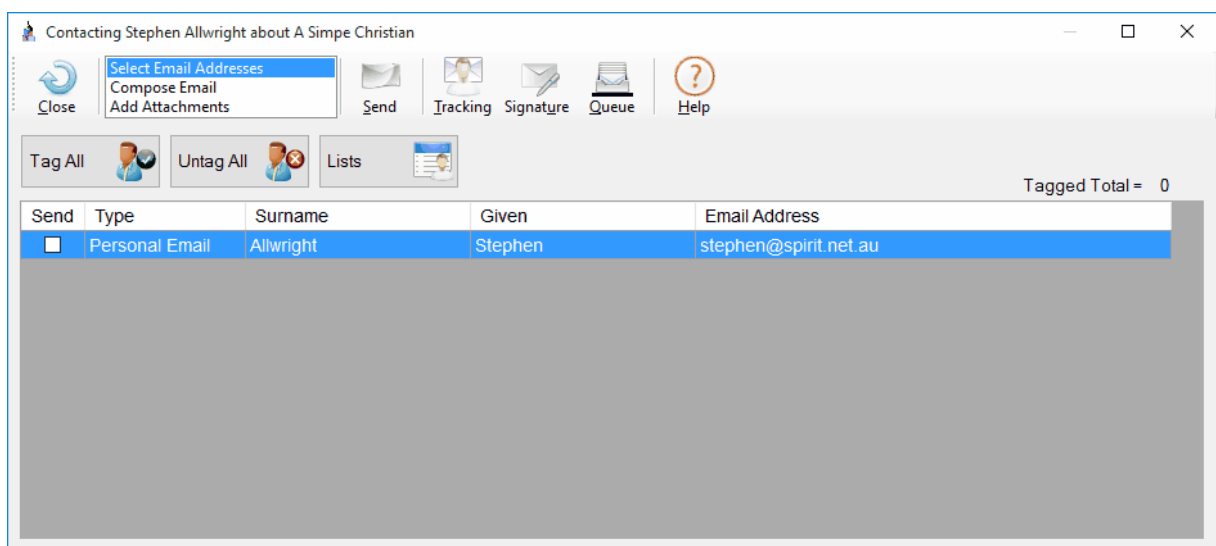
Pressing the SMS button will start a process to send a reminder text message to the selected person in the [Reserve List](#). You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose SMS Message. See [SMS](#) for more information on this area.

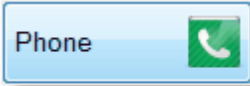
To send the message, simply tick the Send option on the line that contains the phone number to send to, and press the Send button on the toolbar. You can edit the message first by selecting Compose SMS Message if you wish



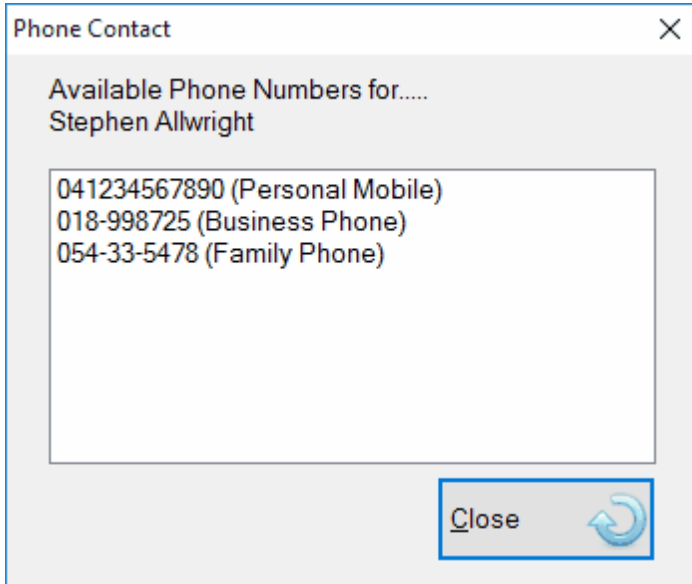
Pressing the Email button will start a process to send a reminder Email message to the selected person in the [Reserve List](#). You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose Email Message. See [Email](#) for more information on this area.

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

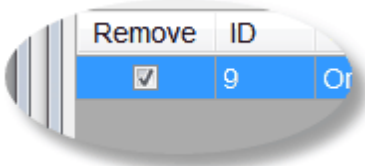




Press the Phone button to show the following window. This displays all available phone numbers for the selected person in the reserve list.



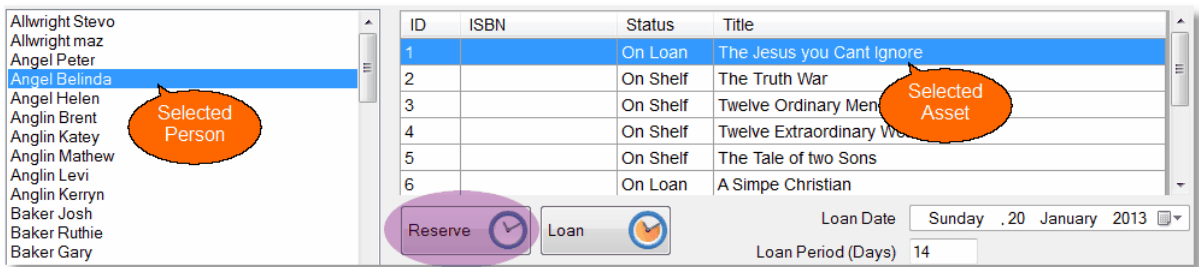
Press the Remove Tag button to delete tagged items from the reserve list.



**Reserve**



Press the Reserve Button to reserve the Selected Asset for the Selected Person. (See below)



## 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

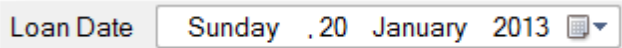
Selected Person: Angel Belinda

Selected Asset: Twelve Ordinary Men

Loan Date: Sunday, 20 January 2013

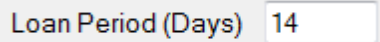
Loan Period (Days): 14

## Loan Date



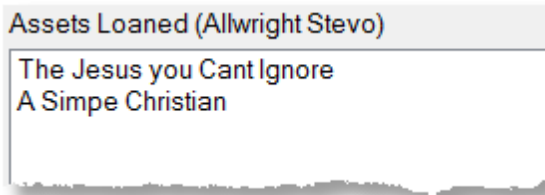
The default loan date is the current date. You can change this here if you need to back date or forward date the loan date manually.

## 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



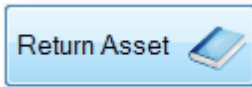
This is a list of assets loaned out to the selected person. Their name is shown just above this list for quick reference.

## 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.

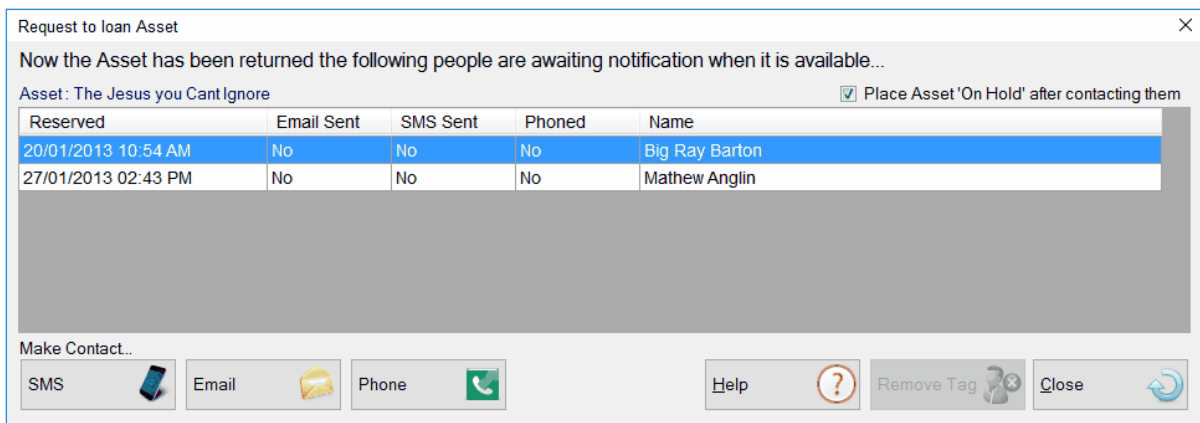
If you Return an asset, and that asset is currently reserved for another person, the Request to Loan window opens up giving you a few options to notify someone that an asset on reserve has become available.

## Request To Loan

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.



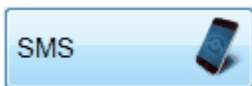
Click on each part of this window to learn more.



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 Asset 'On Hold' after contacting them

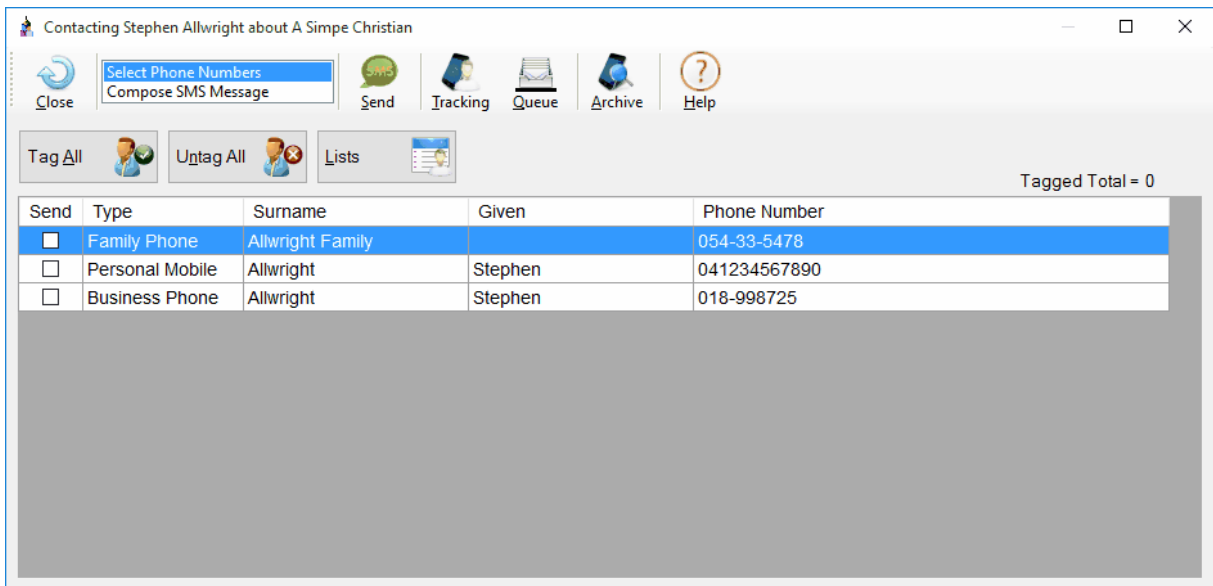
Leave this option ticked to let Pastoral Care change the status of the asset to On Hold after you have contacted a person. This will help Pastoral Care to remind people loaning the asset out again that is currently on hold for a specific individual.



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.

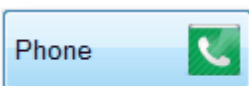
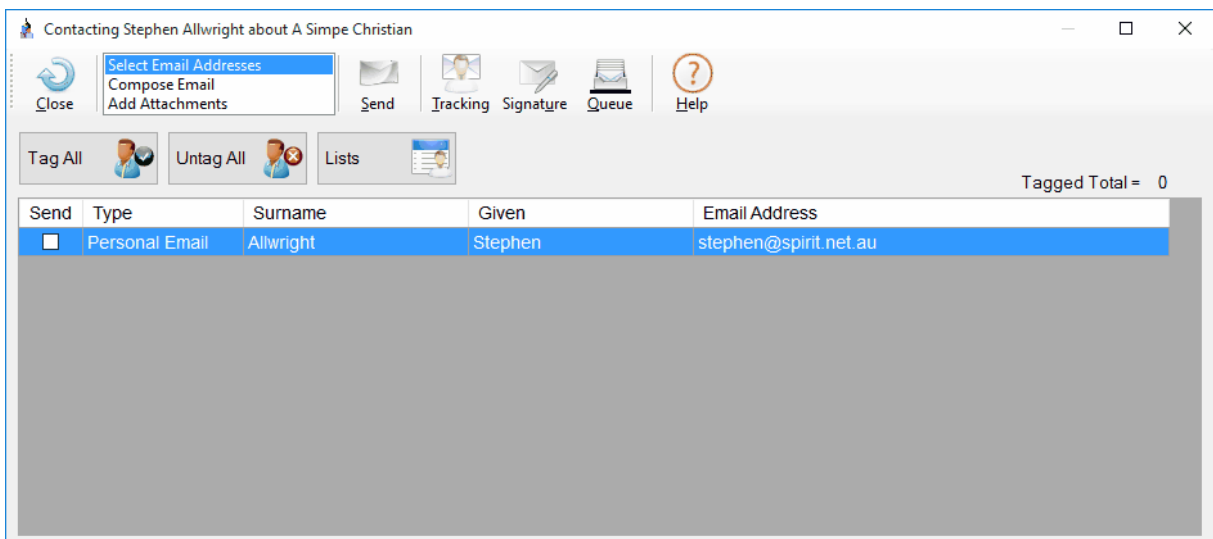
To send the message, simply tick the Send option on the line that contains the phone number to send to, and

press the Send button on the toolbar. You can edit the message first by selecting Compose SMS Message if you wish



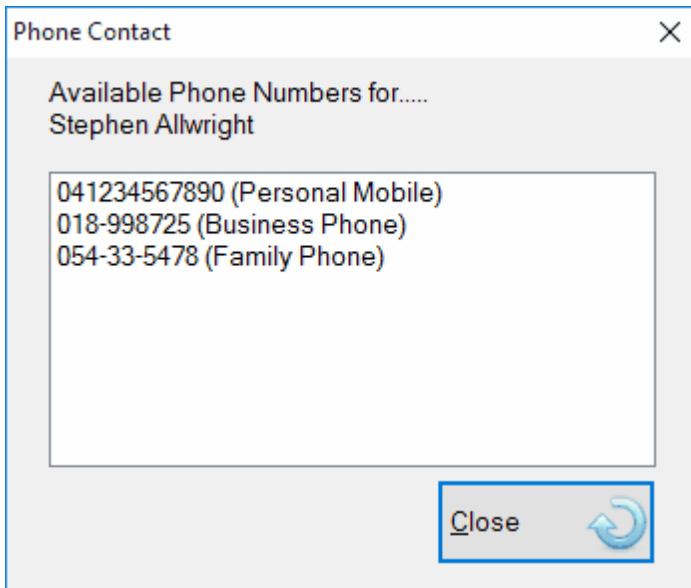
Pressing the Email button will start a process to send a reminder Email message to the selected person in the [Reserve List](#). You will have an opportunity to edit the message before sending it by selecting the toolbar menu item Compose Email Message. See [Email](#) for more information on this area.

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

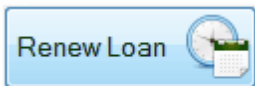


Press the Phone button to show the following window. This displays all available phone numbers for the

selected person in the reserve list.



### Renew Loan



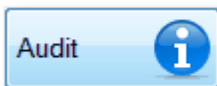
Press the Renew Loan button to renew (extend) a loan period for the selected Asset from the currently selected person.

### Details



After selecting an asset in the [Assets Reserved](#) list, you can press the Details Button to find out more about this asset and its 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 Stephen Allwright

On Loan... To sort by column click on the appropriate header title

ID	ISBN	Borrowed	Due Back	Title
6		14/11/2016	28/11/2016	A Simpe Christian

Over Due Loaned Assets...

ID	ISBN	Borrowed	Due Back	Title
----	------	----------	----------	-------

Reserved Assets...

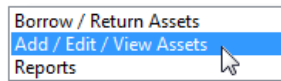
ID	ISBN	Status	Email Sent	SMS Sent	Phoned	Title
4	1400280281	On Shelf	No	No	No	Twelve Extraordinary Women

Loan History...

Remove	ID	ISBN	Borrowed	Returned	Period (days)	Title
<input type="checkbox"/>	11	080245304X	01/09/2016	28/11/2016	89	Gods High Calling For Women
<input type="checkbox"/>	11	080245304X	01/09/2016	01/01/2016	-243	Gods High Calling For Women
<input type="checkbox"/>	11	080245304X	01/09/2016	28/11/2016	89	Gods High Calling For Women

Help ?
Report
Remove Tag
Close

## Add / Edit / View Assets

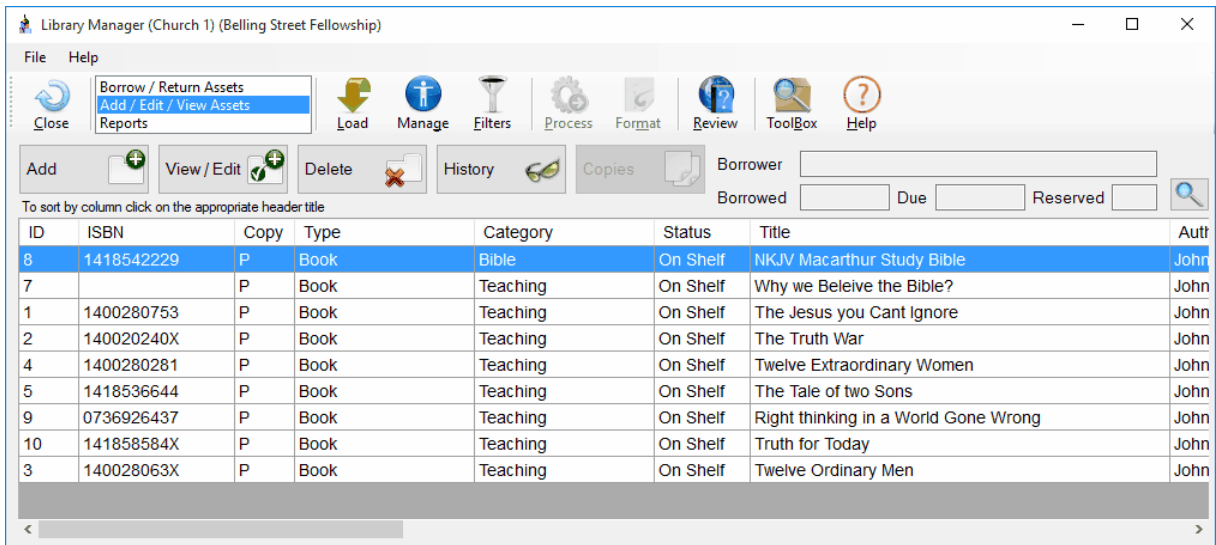


Selecting the Add / Edit / View Assets from the Library Manager Toolbar will open up a range of controls to assist you in the maintenance of your asset list.



Click on each part of this window to learn more. (Note, for clarity, this window is shown with sample assets already loaded.)





**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

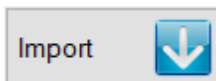
Add Asset to Bar Code Print Report

### Added Date

Added Date

This is the date that the Asset was added to the Library, or is being added to the Library.

### Import



Press the Import Button to let you import a number of items at once. You will need to select the Asset Type first that you are importing, and use a CSV text file that can be created using a spreadsheet.

### Copy

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.

## Pop Up Copy Link window...

Add Asset as a Copy X

Please choose which Primary Asset that you wish to add a copy to...

ID	ISBN	Title	Author
1	1400280753	The Jesus you Cant Ignore	John Macarthur
2	140020240X	The Truth War	John Macarthur
3	140028063X	Twelve Ordinary Men	John Macarthur
4	1400280281	Twelve Extraordinary Women	John Macarthur
5	1418536644	The Tale of two Sons	John Macarthur
6		A Simpe Christian	John Macarthur
8	1418542229	NKJV Macarthur Study Bible	John Macarthur
9	0736926437	Right thinking in a World Gone Wrong	John Macarthur
10	141858584X	Truth for Today	John Macarthur
11	080245304X	Gods High Calling For Women	John Macarthur

To sort by column click on the appropriate header title

Place Primary edition details into copy edition

Cancel ↩ Add Copy

### ISBN

ISBN

An ISBN number is an "International Standard Book Number". This is a ten- or thirteen-digit number assigned to every book before publication.

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

Select the Asset Type for the new asset you are creating.

### Status

Status

The Following Status's can be selected for the status of an Asset. These are system created Status's that cannot be edited.

**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.

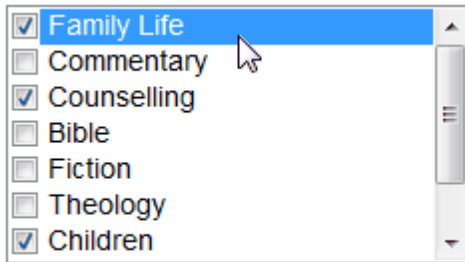
The asset will not return to a state of Archived after that asset is returned, as re-loaning the asset indicates that you have decided to put that asset back into circulation.

### Loan Period

Loan Period (days)

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.

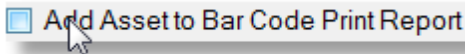
### Category



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)

### 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.

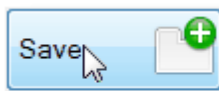
**New Asset Item Mask**

The Mask function allows after adding a new Asset for the fields chosen below not to be cleared, this way you can quickly enter multiple new Assets for the same Author

- ISBN
- Title
- Author
- Comment
- Asset Type & Loan Period
- Status
- Category

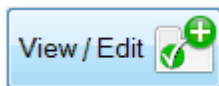


### Save



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

### Added Date

Added Date

This is the date that the Asset was added to the Library.

### Copy

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.

### Pop Up Copy Link window...

Add Asset as a Copy X

Please choose which Primary Asset that you wish to add a copy to...

ID	ISBN	Title	Author
1	1400280753	The Jesus you Cant Ignore	John Macarthur
2	140020240X	The Truth War	John Macarthur
3	140028063X	Twelve Ordinary Men	John Macarthur
4	1400280281	Twelve Extraordinary Women	John Macarthur
5	1418536644	The Tale of two Sons	John Macarthur
6		A Simpe Christian	John Macarthur
8	1418542229	NKJV Macarthur Study Bible	John Macarthur
9	0736926437	Right thinking in a World Gone Wrong	John Macarthur
10	141858584X	Truth for Today	John Macarthur
11	080245304X	Gods High Calling For Women	John Macarthur

To sort by column click on the appropriate header title  Place Primary edition details into copy edition

### ISBN

ISBN

An ISBN number is an "International Standard Book Number". This is a ten- or thirteen-digit number assigned to every book before publication.

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.

### Status

The Following Status's can be selected for the status of an Asset. These are system created Status's that cannot be edited.

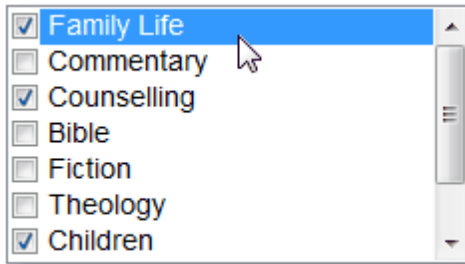
- On Shelf**      An Asset that is On Shelf is available for borrowing.
- On Loan**      An Asset that is On Loan is not available for borrowing until it is returned.
- On Hold**      An Asset that is On Hold is a Status you can use for the Library to Hold an item from loaning out. This groups items 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.

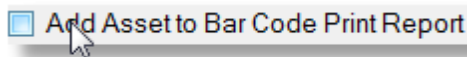
### Category



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.

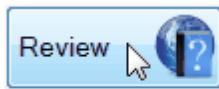
In the example above, the asset is related to Family and Children Counseling.

### Bar Code



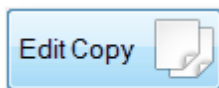
Tick this option to allow this asset to be printed on Bar Code reports. (ie: You want to use a Pastoral Care generated bar code for managing this asset)

### Review



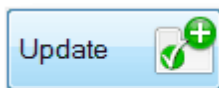
Press the Review Button to allow Pastoral Care to do a search on the internet for book information using the ISBN number entered. This will not work without an ISBN number.

### 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

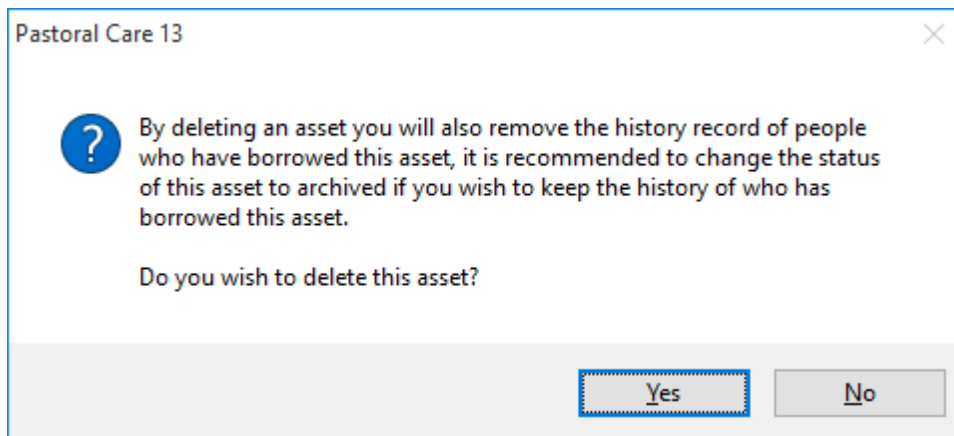


Save your edit's to the asset.

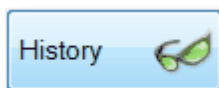
### Delete



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.



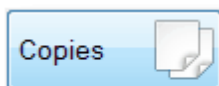
### Asset History



Pressing the History Button in the [Add / Edit / View Assets](#) window will open the Asset History window for the single selected asset.

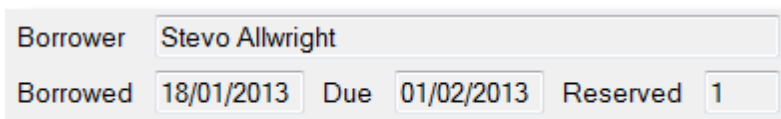
See [Asset History](#) for full details

### 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.

### 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 <a href="#">Setup Library Manager</a>
CATEGORY	YES	Asset Category/ Categories. These can be setup in <a href="#">Setup Library Manager</a>
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 bee 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

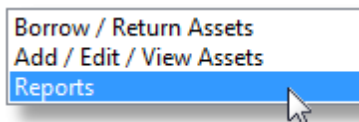
COPIES ID	NO	ID numbers of the Copies
ADDED	YES	Date the asset was added to the Library Manager
COMMENTS	YES	Comments about the asset.

## 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.

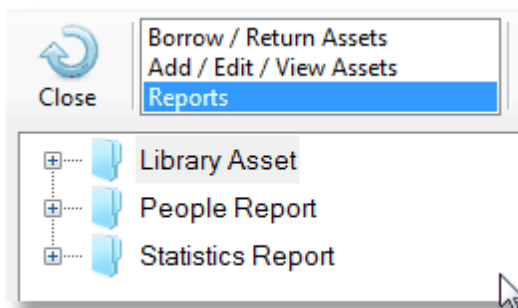


## Pre Flight Options

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.

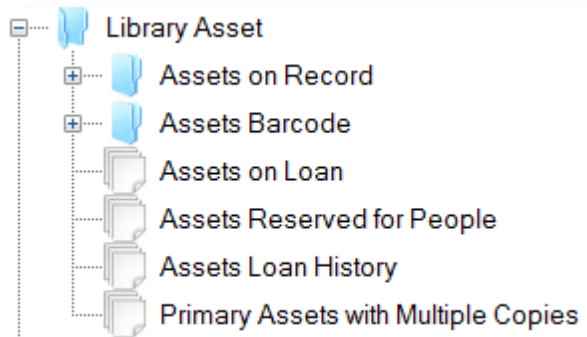
## Library Report Types

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.




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

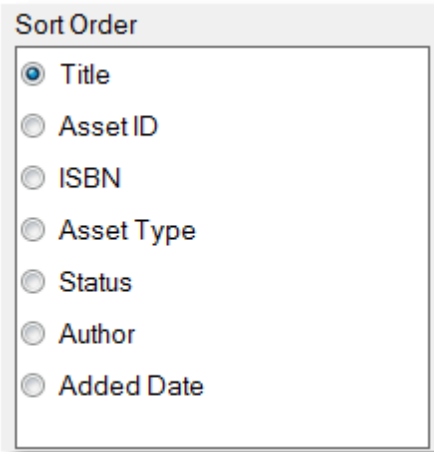
Library Report Setup

<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 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> <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 <div style="text-align: center;"> <input type="text" value="8/11/2015"/> <input type="button" value="▼"/>              To  <input type="text" value="8/11/2015"/> <input type="button" value="▼"/> </div>

<p>Filter - Asset Type</p> <input checked="" type="checkbox"/> Book <input checked="" type="checkbox"/> DVD <input checked="" type="checkbox"/> Magazine	<p>Filter - Category</p> <input checked="" type="checkbox"/> Family Life <input checked="" type="checkbox"/> Commentary <input checked="" type="checkbox"/> Counselling <input checked="" type="checkbox"/> Bible <input checked="" type="checkbox"/> Fiction <input checked="" type="checkbox"/> Theology <input checked="" type="checkbox"/> Children <input checked="" type="checkbox"/> Worship Music <input checked="" type="checkbox"/> Teaching	<p>Filter - Status</p> <input checked="" type="checkbox"/> On Shelf <input checked="" type="checkbox"/> On Loan <input checked="" type="checkbox"/> On Hold <input checked="" type="checkbox"/> In Repair <input checked="" type="checkbox"/> Lost <input checked="" type="checkbox"/> Archived
--	--	--

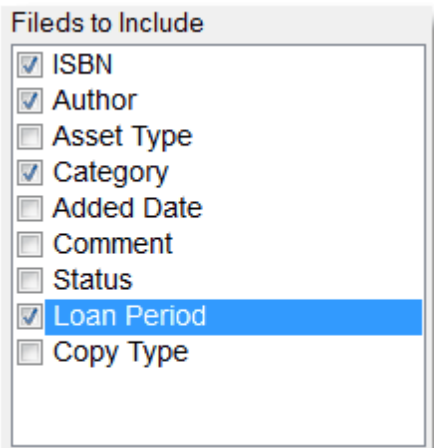
Filters in this pre-flight are all inclusive filters. That is, if you do not tick any filters, then all information from all areas is included. If you tick say 3 Categories, then those 3 Categories are included and all other Categories are excluded. This is true for each filter shown above.



Sort Order

- Title
- Asset ID
- ISBN
- Asset Type
- Status
- Author
- Added Date

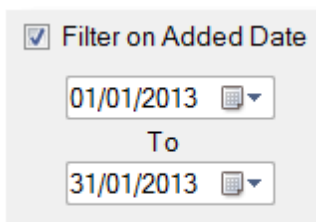
Choose the order to sort the report by.



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.



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 2014



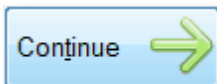
Copies

Primary & Copy

Primary

Copy

Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.



Press the Continue Button to run the selected report.

Sample Catalogue Report shown below...

Library Catalogue - Main Church	
<p>A Simpe Christian</p> <p>ID: 6</p> <p>Author: John Macarthur</p> <p>Category Teaching</p>	Loan Period (days): 14
<p>Gods High Calling For Women</p> <p>ID: 11</p> <p>Author: John Macarthur</p>	Loan Period (days): 14
<p>NKJV Macarthur Study Bible</p> <p>ID: 8</p> <p>Author: John Macarthur</p> <p>Category Bible</p>	Loan Period (days): 14
<p>Right thinking in a World Gone Wrong</p> <p>ID: 9</p> <p>Author: John Macarthur</p>	

### 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.

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><b>Filter - Asset Type</b></p> <input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine	<p><b>Filter - Category</b></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><b>Filter - Status</b></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><b>Sort Order</b></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><b>Copies</b></p> <input checked="" type="radio"/> Primary & Copy <input type="radio"/> Primary <input type="radio"/> Copy	<p><input type="checkbox"/> Filter on Added Date</p> <div style="margin-left: 20px;"> <input type="text" value="8/11/2015"/> <input type="button" value="▼"/> </div> <p style="text-align: center;">To</p> <div style="margin-left: 20px;"> <input type="text" value="8/11/2015"/> <input type="button" value="▼"/> </div>

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**


Title  
 Asset ID  
 ISBN  
 Asset Type  
 Status  
 Author  
 Added Date

Choose the order to sort the report by.

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 2014

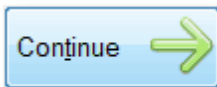
Copies

Primary & Copy

Primary

Copy

Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.



Press the Continue Button to run the selected 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.

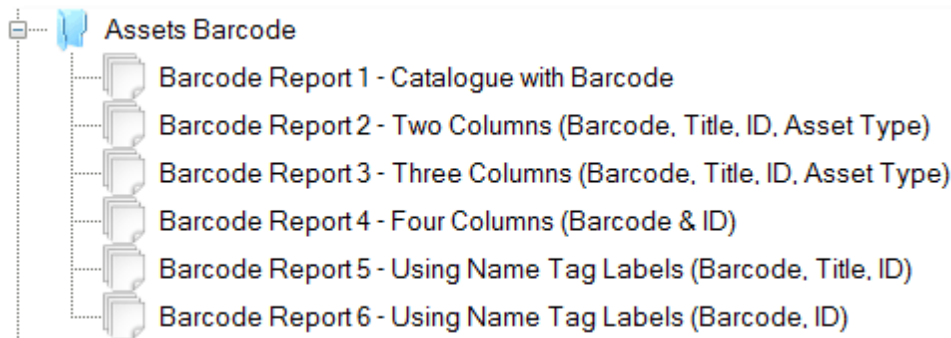
See [Pre-Flight Options](#) for more information on this report. A Sample for this report is shown below.

### 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.



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 

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
Fields to Include	Sort Order	Copies
<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	<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	<input checked="" type="radio"/> Primary & Copy <input type="radio"/> Primary <input type="radio"/> Copy  <input type="checkbox"/> Filter on Added Date <div style="text-align: center;"> <input type="text" value="8/11/2015"/>               To  <input type="text" value="8/11/2015"/>  </div>

Help 
Cancel 
Continue 

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.



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

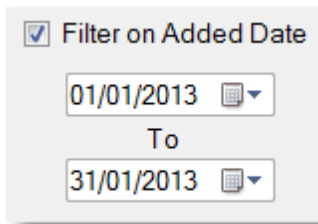
Filters in this pre-flight are all inclusive filters. That is, if you do not tick any filters, then all information from all areas is included. If you tick say 3 Categories, then those 3 Categories are included and all other Categories are excluded. This is true for each filter shown above.

Sort Order
<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.

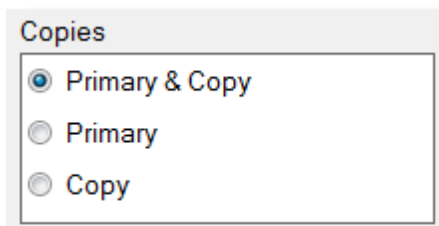
Fields to Include
<input checked="" type="checkbox"/> ISBN
<input checked="" type="checkbox"/> Author
<input type="checkbox"/> Asset Type
<input checked="" type="checkbox"/> Category
<input type="checkbox"/> Added Date
<input type="checkbox"/> Comment
<input type="checkbox"/> Status
<input checked="" type="checkbox"/> Loan Period
<input type="checkbox"/> Copy Type

In addition to the title field, tick the addition fields that you want on the report.



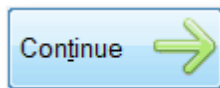
A dialog box with a checked checkbox labeled "Filter on Added Date". Below it are two date input fields. The first field contains "01/01/2013" and the second field contains "31/01/2013". Between the two fields is the word "To". Each date field has a small calendar icon to its right.

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 2014






A dialog box titled "Copies" containing three radio button options: "Primary & Copy" (which is selected), "Primary", and "Copy".

Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.



Press the Continue Button to run the selected report.

Sample Catalogue Report with Bar Code shown below...

Barcode Report 1 - Main Church	
	<p>ID: 6                      A Simpe Christian</p> <p>Author: John Macarthur</p> <p>Category Teaching</p> <p>Status: On Loan                      Added Date: 03/11/2009</p> <p style="text-align: right;">Asset Type: Book</p>
	<p>ID: 11                      Gods High Calling For Women</p> <p>Author: John Macarthur</p> <p>Status: On Shelf                      Added Date: 03/11/2009</p> <p style="text-align: right;">Asset Type: Book</p>
	<p>ID: 8                      NKJV Macarthur Study Bible</p> <p>Author: John Macarthur</p> <p>Category Bible</p> <p>Status: On Shelf                      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.


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 




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

Copies


Primary & Copy  
 Primary  
 Copy

Filter on Added Date

8/11/2015  To 8/11/2015 

Help 
 Cancel 
 Continue 

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.

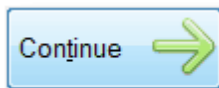
Filter - Asset Type	Filter - Category	Filter - Status
<input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine	<input type="checkbox"/> Family Life <input type="checkbox"/> Commentary <input type="checkbox"/> Counselling <input type="checkbox"/> Bible <input type="checkbox"/> 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.






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 2014

Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.









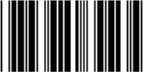





Press the Continue Button to run the selected report.

Sample 2 Column Bar Code Report shown below...

Barcode Report 2 - Main Church			
	ID: 6 Asset Type: Book		ID: 3 Asset Type: Book
A Simpe Christian		Twelve Ordinary Men	
	ID: 15 Asset Type: Book		ID: 7 Asset Type: Book
God has a sense of Humour		Why we Believe the Bible?	
	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 Simple 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 4 - Main Church			
			
ID: 6	ID: 31	ID: 38	ID: 3
			
ID: 15	ID: 32	ID: 39	ID: 7
			
ID: 13	ID: 33	ID: 40	
			

**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><b>Filter - Asset Type</b></p> <input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine	<p><b>Filter - Category</b></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><b>Sort Order</b></p> <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
--	--	--

Filter on Borrowed Date     To   
 Filter on Due Back Date     To

Primary & Copy  
 Primary  
 Copy

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.

<p><b>Filter - Asset Type</b></p> <input type="checkbox"/> Book <input type="checkbox"/> DVD <input checked="" type="checkbox"/> Magazine	<p><b>Filter - Category</b></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
---	--

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**

Title

Asset ID

Borrowed Date

Due Back Date

Borrowed By

Choose the order to sort the report by.

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 2014

Filter on Due Back Date   To

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 2014.

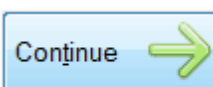
Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.

**Copies**

Primary & Copy

Primary

Copy



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><b>Filter - Asset Type</b></p> <input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine	<p><b>Filter - Category</b></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><b>Sort Order</b></p> <input checked="" type="radio"/> Title <input type="radio"/> Asset ID <input type="radio"/> Status <input type="radio"/> Reserved Date <input type="radio"/> Reserved For
<p><b>Copies</b></p> <input checked="" type="radio"/> Primary & Copy <input type="radio"/> Primary <input type="radio"/> Copy		

Filter on Reserved Date    8/11/2015    To    8/11/2015

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.

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
<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

Choose the order to sort the report by.

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 2014.

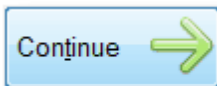
Copies

Primary & Copy

Primary

Copy

Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.



Press the Continue Button to run the selected report.

### Sample Report

Library Assets Reserved - Main Church									
ID:	Status	(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

Filter - Asset Type	Filter - Category	Sort Order
<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 checked="" type="radio"/> Title <input type="radio"/> Asset ID <input type="radio"/> Borrowed Date <input type="radio"/> Return Date <input type="radio"/> Borrowed By
		<b>Copies</b> <input checked="" type="radio"/> Primary & Copy <input type="radio"/> Primary <input type="radio"/> Copy
<input type="checkbox"/> Filter on Borrowed Date    8/11/2015    To    8/11/2015		
<input type="checkbox"/> Filter on Returned Date    8/11/2015    To    8/11/2015		
<input type="button" value="Help"/> 		<input type="button" value="Cancel"/>  <input type="button" value="Continue"/> 

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

- Title
- Asset ID
- Borrowed Date
- Due Back Date
- Borrowed By

Choose the order to sort the report by.

Filter on Borrowed Date 25/01/2013 To 25/01/2013

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 2014.

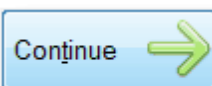
Filter on Returned Date 25/01/2013 To 25/01/2013

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 2014.

Copies

- Primary & Copy
- Primary
- Copy

Select to display Primary and Copy (Default Catch All Filter) or only the Primary Asset, or Only Copies.



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.

## 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**

<p><b>Filter - Asset Type</b></p> <input type="checkbox"/> Book <input type="checkbox"/> DVD <input type="checkbox"/> Magazine	<p><b>Filter - Category</b></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><b>Filter - Status</b></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
--	--	---

**Sort Order**

 Title  
 Asset ID

Filter on Added Date

8/11/2015 To 8/11/2015





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

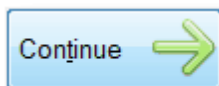
Filters in this pre-flight are all inclusive filters. That is, if you do not tick any filters, then all information from all areas is included. If you tick say 3 Categories, then those 3 Categories are included and all other Categories are excluded. This is true for each filter shown above.

Title  
 Asset ID

Choose the order to sort the report by.

Filter on Added Date  
25/01/2013  To 25/01/2013 

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 2014.



Press the Continue Button to run the selected report.

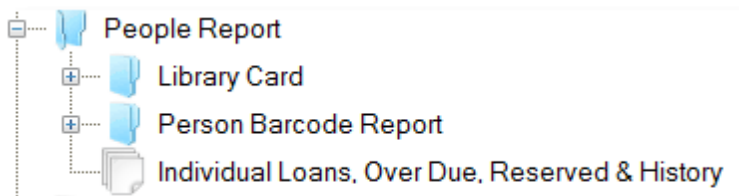
### Sample Report

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.

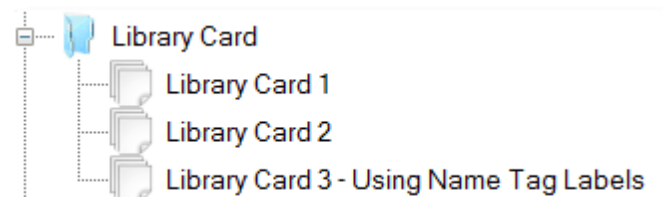
Click on each group and report below for more information.



### 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 LibraryCard 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.

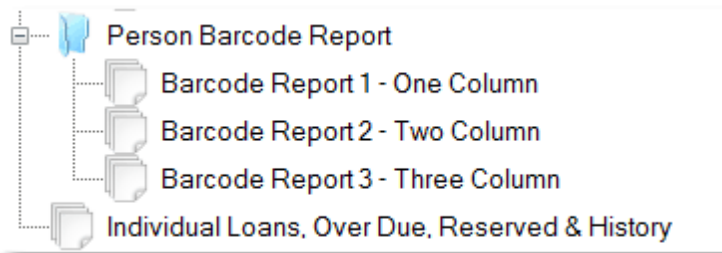


### Library Card 3 - Using Name Tag Labels

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		
	<b>Allwright</b>	maz
	<b>Allwright</b>	Stevo
	<b>Angel</b>	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			
	<b>Allwright</b> maz		<b>Barton</b> Mum
	<b>Allwright</b> Stevo		<b>Barton</b> Karren
	<b>Angel</b> Belinda		<b>Barton</b> Big Ray
	<b>Angel</b> Helen		<b>Blackeby</b> 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					
	<b>Allwright</b> maz		<b>Anglin</b> Mathew		<b>Blackeby</b> Frank
	<b>Allwright</b> Stevo		<b>Baker</b> Gary		<b>Blackeby</b> Heather
					<b>Bl</b>

## 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.

Audit Report

Report Components...

<input checked="" type="checkbox"/> Assets on Loan	<input checked="" type="checkbox"/> Assets Reserved
<input checked="" type="checkbox"/> Assets Over Due	<input checked="" type="checkbox"/> History of Loaned Assets

---

Filter on Borrowed Date

29/12/2015  To 29/12/2015

Filter on Reserved Date

29/12/2015  To 29/12/2015

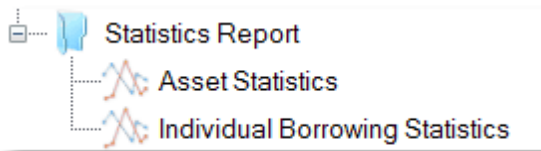
## Sample Report

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						
<b>Allwright Stevo</b>						
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

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

Sort Order

Title  
 Asset ID

Filter on Added Date

8/11/2015 To 8/11/2015

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.

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.

Title  
 Asset ID

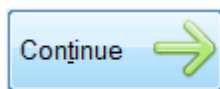


Choose the order to sort the report by.

Filter on Added Date

25/01/2013 To 25/01/2013

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 2014.



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	Bator, Isaac Favourite

### 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 8/11/2015 To 8/11/2015

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

Library Personal Statistics - Main Church		
Borrowed	Surname	Given
2	Allwright	Stevo
1	Anglin	Katey

## Registry

### Introduction

The Pastoral Care Registry program lets you record all important events in your church, including Weddings, Funerals, and any number of commitment ceremonies such as Baptisms, Confirmations, etc. Registry can be found from the Main [Church Tab](#).

You should look at and complete the [Registry Settings](#) in the main setup area of Pastoral Care.

### Three Programs in One!

There are 3 distinct programs in this area. [Commitment](#), [Weddings](#) and [Funerals](#).

We also have one [Reports](#) area to cover all 3 registry areas.

### Commitment

This area lets you record events such as Baptisms, Confirmations, Dedications etc. You can use the [Registry Settings](#) in the main setup area of Pastoral Care to define your own events that you want to record in the Registry area.

### Weddings

Record everything you need to know about a wedding. As the registry program does not need a family file in Pastoral Care to function properly, you can record any wedding that happens at your church, or presided over by one of your ministers.

### Funerals

Record everything you need to know about a funeral. As the registry program does not need a family file in Pastoral Care to function properly, you can record any funeral event that happens at your church, or presided over by one of your ministers.

### Registry Main Screen



Click on each area of the Registry screen shown below to learn more about this feature. As each area has its own features, the bottom of this screen has been shaded out, click on the toolbar icons for information specific to each registry area.

## Toolbar Items

There are a number of common toolbar items that will be active or inactive at various times in the Registry program.

These are shown below.

### New



Press NEW to create a new registry entry for the area you are in. Just look at the toolbar to see which area is highlighted before you press NEW to create a new record.

### Save

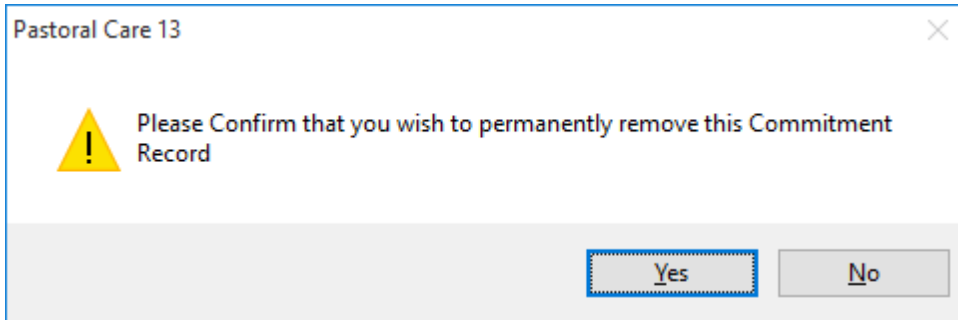


Press this button to save any changes to the current registry area opened. You will be prompted to save if you accidentally try and leave the Registry Program without saving.

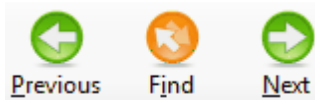
## Delete



Pressing Delete will delete the currently displayed record. The following warning is displayed. This delete cannot be undone.



## Navigation



Whichever of the Registry Programs you are in ( [Commitment](#), [Weddings](#), or [Funerals](#) ) you can use the controls shown here for moving through the records.

## Find

Press the [Find](#) Button to search through the records.

## Find

The Find feature in Registry lets you search through any area of the registry records.



Click on each part of this window to learn more.

The Registry Find window is titled "Registry Find" and has a close button (X) in the top right corner. It features three tabs: "Commitment", "Weddings", and "Funerals". The "Commitment" tab is currently selected. Below the tabs, there are several search criteria fields: "Commitment Type", "Location", "Officiating Person", "Sponsor Type", and "Text Search". To the right of these fields, there are filter options: "Filter by Year" (set to "All Years") and "Filter by Date" (set to "20/12/2015" to "20/12/2015"). Below the filters, there are "Order By" options: "Surname" (selected) and "Commitment Date". A "Search" button with a magnifying glass icon is located to the left of the search criteria fields. Below the search criteria, there is a table with the following data:

Select	Date	Commitment Type	Surname	Given
<input checked="" type="checkbox"/>	01/02/2016	Baptism	Hills	Allison
<input checked="" type="checkbox"/>	01/02/2016	Church Membership	Philips	Stephen

At the bottom of the window, there are several action buttons: "SMS" (with a mobile phone icon), "Email" (with an envelope icon), "Map" (with a map icon), "Help" (with a question mark icon), "Open File" (with a folder icon), and "Close" (with a circular arrow icon).

## Select Area

The Select Area shows three tabs: "Commitment", "Weddings", and "Funerals". The "Commitment" tab is currently selected and highlighted.

Select the area that want to search through at the top of the Find window. Each area has its own [Search Criteria](#) for searching through.

## Search Criteria

Shown below are the 3 different search criteria areas. Simply select an item from any field to search through, or enter some text in the Text Search field to look for Names etc. The Text Search will look for information in ANY of the text fields such as Certificate Numbers, Comments, Names, Address and Phone information etc.

### Commitment Criteria

The Commitment search criteria fields are:

- Commitment Type:
- Location:
- Officiating Person:
- Sponsor Type:
- Text Search:

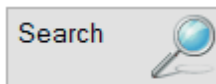
### Weddings

The Weddings search criteria fields are:

- Location:
- Officiating Person:
- Text Search:

**Funerals**

Location	<input type="text"/>
Officiating Person	<input type="text"/>
Funeral Directors	<input type="text"/>
Interment Location	<input type="text"/>
Text Search	<input type="text"/>

**Search**

Press the Search Button to find records that match any of the criteria you have entered into the Find form.

**Filter By Year**

Filter by Year

Filter for all records in a calendar year.

**Filter By Date**

Filter by Date  To

Use the Filter By Date fields to set a specific date range to locate events by the actual date.

**Order By**

Order By..  Surname  Funeral Date

Select to order your search results by Surname or by the date of the Registry Event.

**Records Found**

This area shows the records found. You can Tag individual records for sending an Email or SMS to. Double clicking on a result line in this area will open that record for more detailed viewing / editing of that record.

Select	Date	Surname	Given	Funeral Directors
<input type="checkbox"/>	23/01/2016	Barton	Ray	Vanderson Brothers
<input type="checkbox"/>	25/01/2016	Graham	Brook	Serenity Ladies

## Tag / Untag



Press the Green tick icon to select all records



Press the red Cross Icon to de-select all records

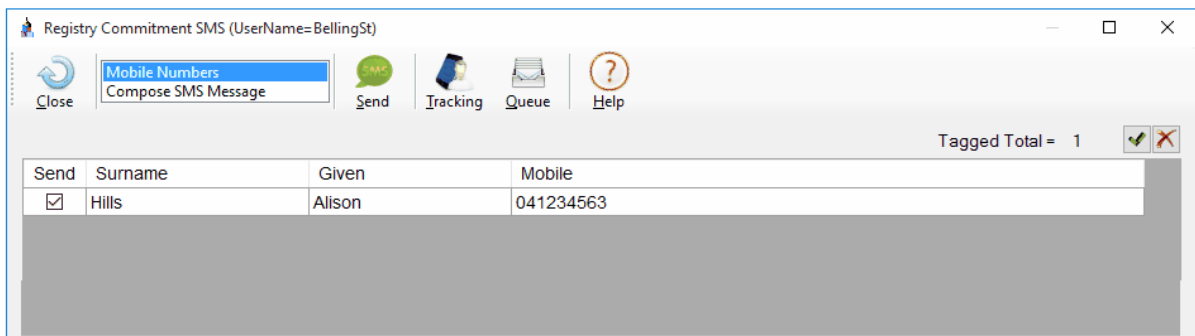
## SMS

Use the SMS button to load the following SMS screen. From here you can compose a message and send to selected people.

The SMS function is the same for each Registry Area (Commitment, Wedding, Funeral)



Click on each part of this window to learn more.



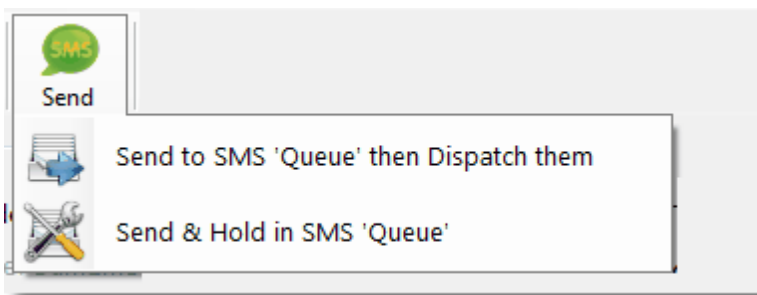
## Mobile Numbers

The Mobile Numbers area of the Registry SMS feature lets you Tag (select) people to send a message to. Simply Tag those people in the list that you have searched for, and press Compose to write your message, then send!

## Send



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



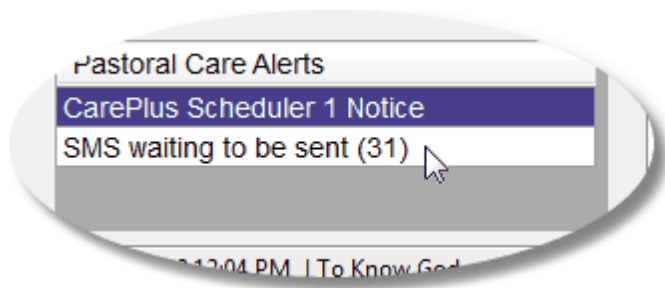


## Send to Queue and Dispatch

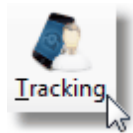
This option sends the SMS messages immediately. In either case, all SMS messages must go via the new Pastoral Care [SMS Queue](#) program. This program handles SMS messages and allows control / use of Pastoral Care it'self to remain with the user while messages are being sent.

## 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.



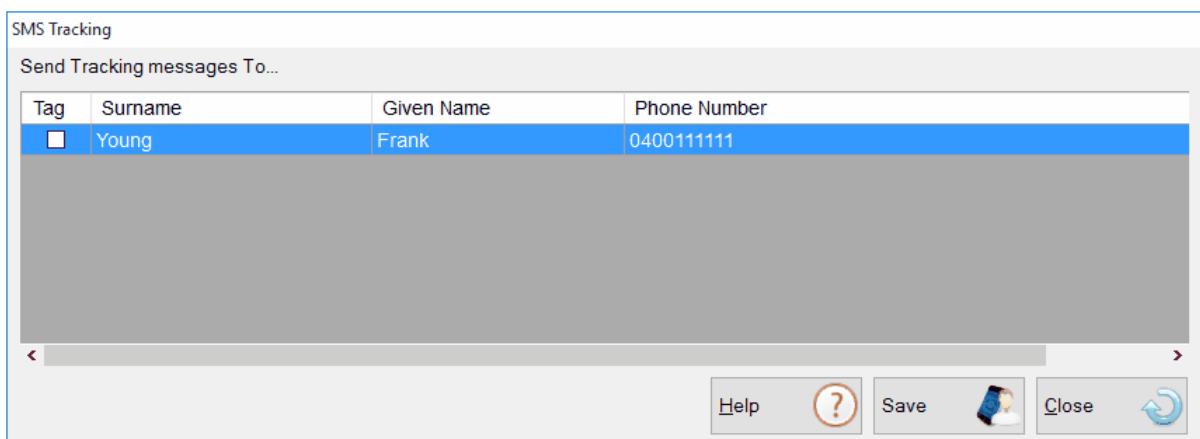
## Tracking



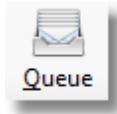
Tracking allows you to enable a blind CC of the messages sent from Pastoral Care. See [SMS Tracking](#) in the Setup area of Pastoral Care for information on setting up Tracking Mobile Numbers. IN the SMS Manager, press Tracking on the toolbar, and tag the people that you want to receive a copy of the 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 a program that is automatically controlled from Pastoral Care it'self. It takes SMS messages off Pastoral Care, and sends them on either later (manually) or immediately (automatically).

If there are messages ready to be sent, there will be black line UNDER the Queue icon. See the [SMS Queue](#) for full details on this feature.

## Tag / Untag



Press the Green tick icon to select all people to send a message to



Press the red Cross Icon to de-select all people

## List

This area shows the number of records found from your search. Double click on a name to open that Registry Record.

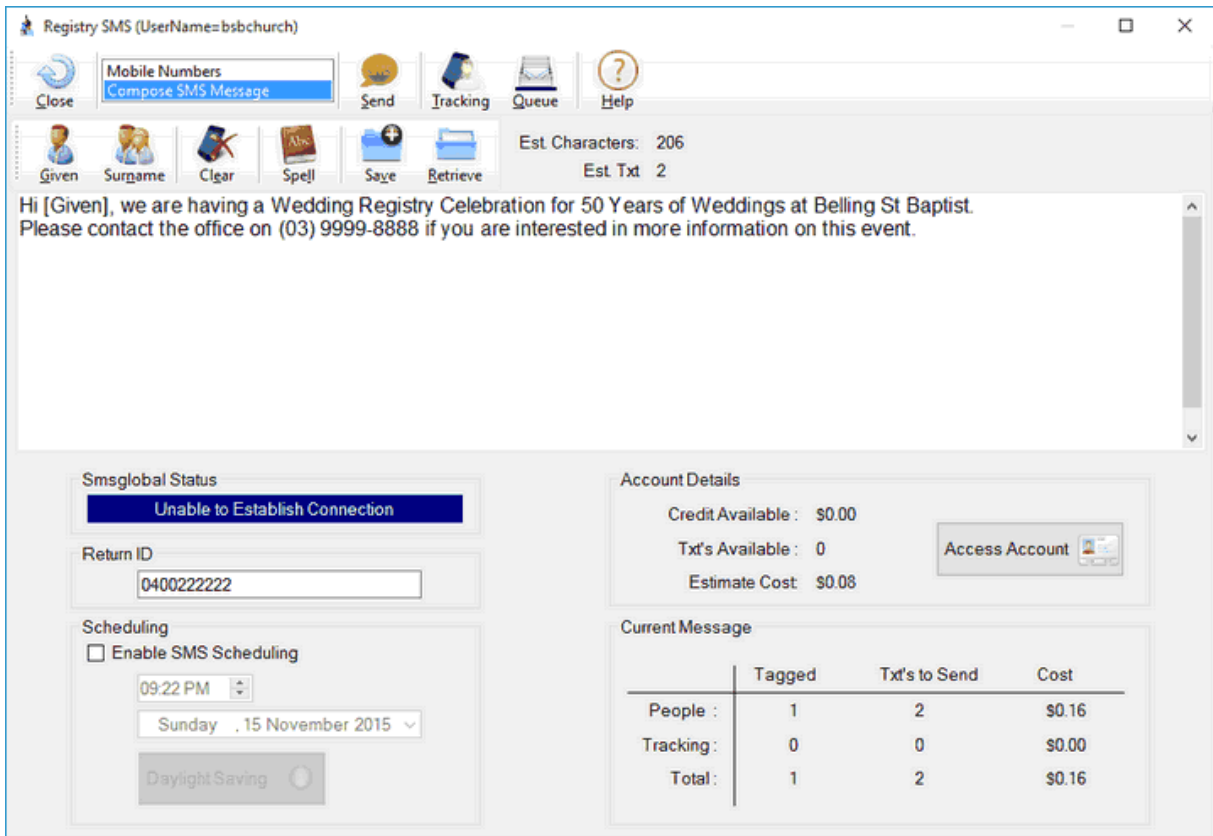
Send	Surname	Given	Mobile
<input checked="" type="checkbox"/>	Blackeby	Frank	041234567890
<input checked="" type="checkbox"/>	Dimsey	Sarah	041234567890
<input checked="" type="checkbox"/>	Jonhston	Brian	04567634323
<input checked="" type="checkbox"/>	Hicks	Jessica	04342456323

## Compose SMS Message

Shown below is the Registry Compose SMS window.

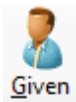


Click on each part of this window to learn more.

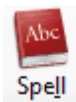


**Compose Toolbar**

Shown below are the 6 icons on the Compose Toolbar for the SMS feature in the Registry Program.



Insert a field to include a persons Given Name in the SMS Message



Run the Spell Check over the SMS message



Insert a field to include a persons Surname in the SMS Message



Save this message for use as a template later on



Erase the currently composed email



Retrieve a saved SMS template for use

**Compose Area**

Type your message in this area. Note that above this area the number of estimated characters are displayed and how many standard text messages that will be consumed. We state this is an estimate only if you are using a field in the message.

Hi [Given], we are having a Wedding Registry Celebration for 50 Years of Weddings at Belling St Baptist. Please contact the office on (03) 9999-8888 if you are interested in more information on this event.

### Scheduling

The scheduling options let you set a time to send your message.

See [Scheduling](#) in the SMS section for full details.

### Account Details

This area shows the current account statistics, how many messages left and estimated cost of sending your messages.

### Email

Use the Email button to load the following Email screen. From here you can compose a message and send to selected people.

The email function is the same for each Registry Area (Commitment, Wedding, Funeral)



Click on each part of this window to learn more.

Send	Surname	Given	Email
<input checked="" type="checkbox"/>	Hills	Alison	ali@gmail.com

## Email Addresses

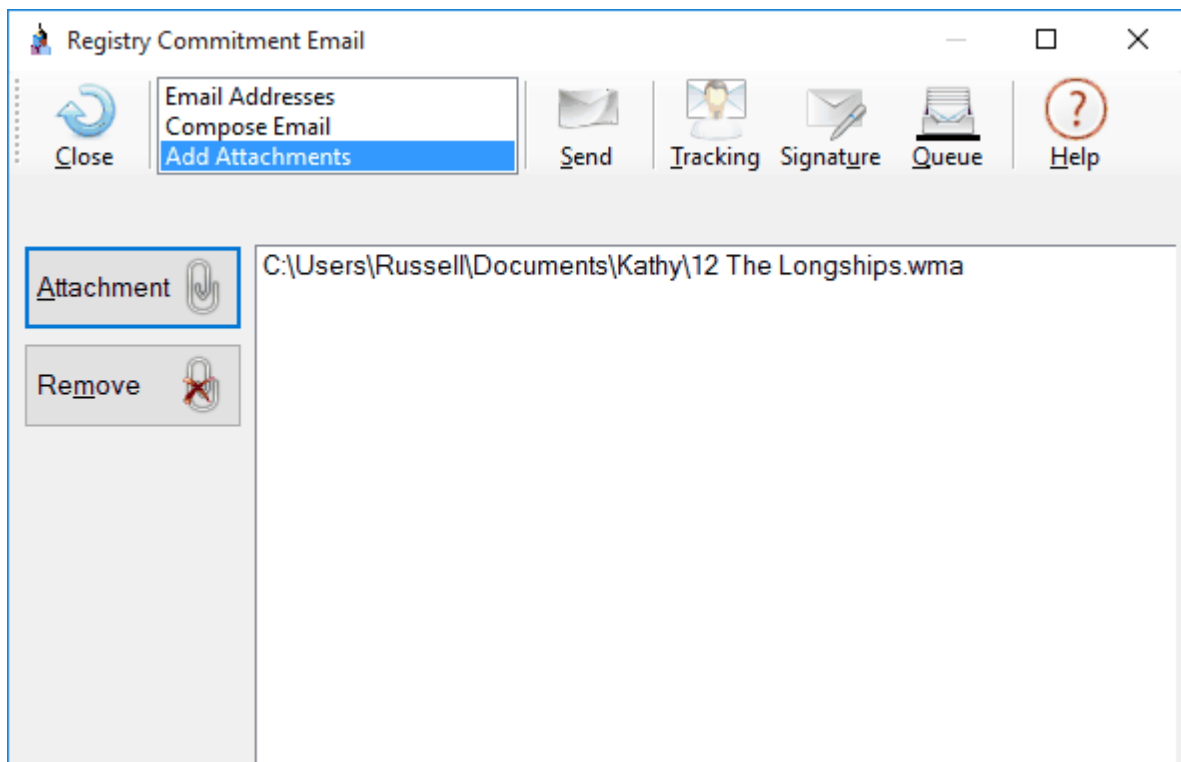
Select (Tag) the people you want to send an email to.

Send	Surname	Given	Email
<input checked="" type="checkbox"/>	Hills	Alison	ali@gmail.com

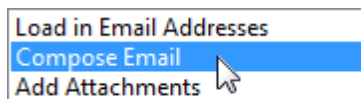
## Add Attachments

### Add Attachments

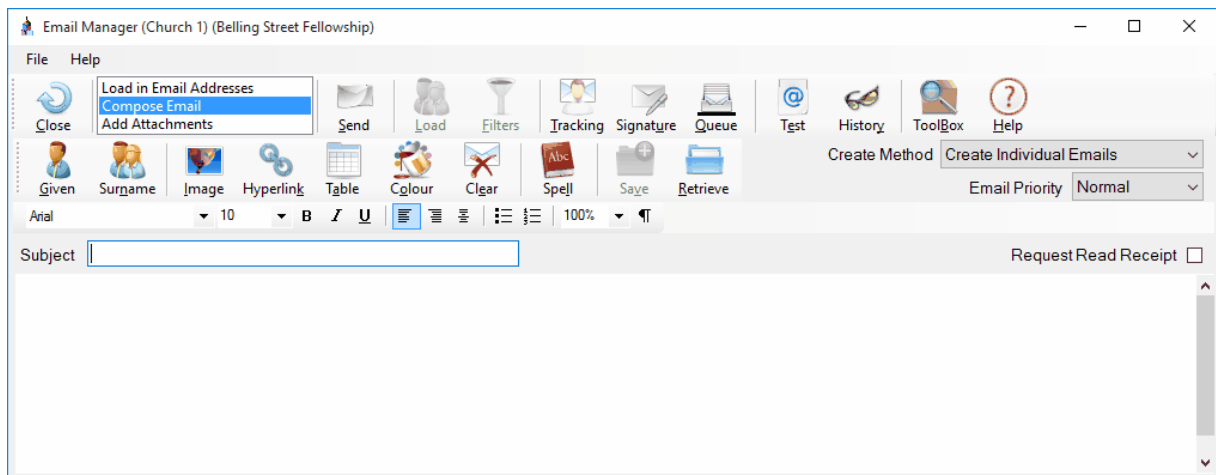
Use the Add Attachments window to select what files you want to send with the emails. *Note: If you are sending a large attachment to many people, the "Create Individual Emails" method whilst preferred for privacy, will be slower to send.* The Pastoral Care email engine in this version is far superior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



## 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.



## Top Toolbar

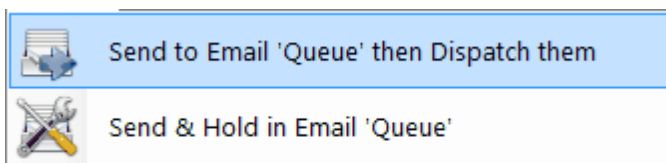


Click on each of the toolbar areas below to learn more.



After selecting people to send an email to, and composing your email, press the Send button to process all outbound emails to the [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)



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.

Email Tracking

Send Tracking Email To...

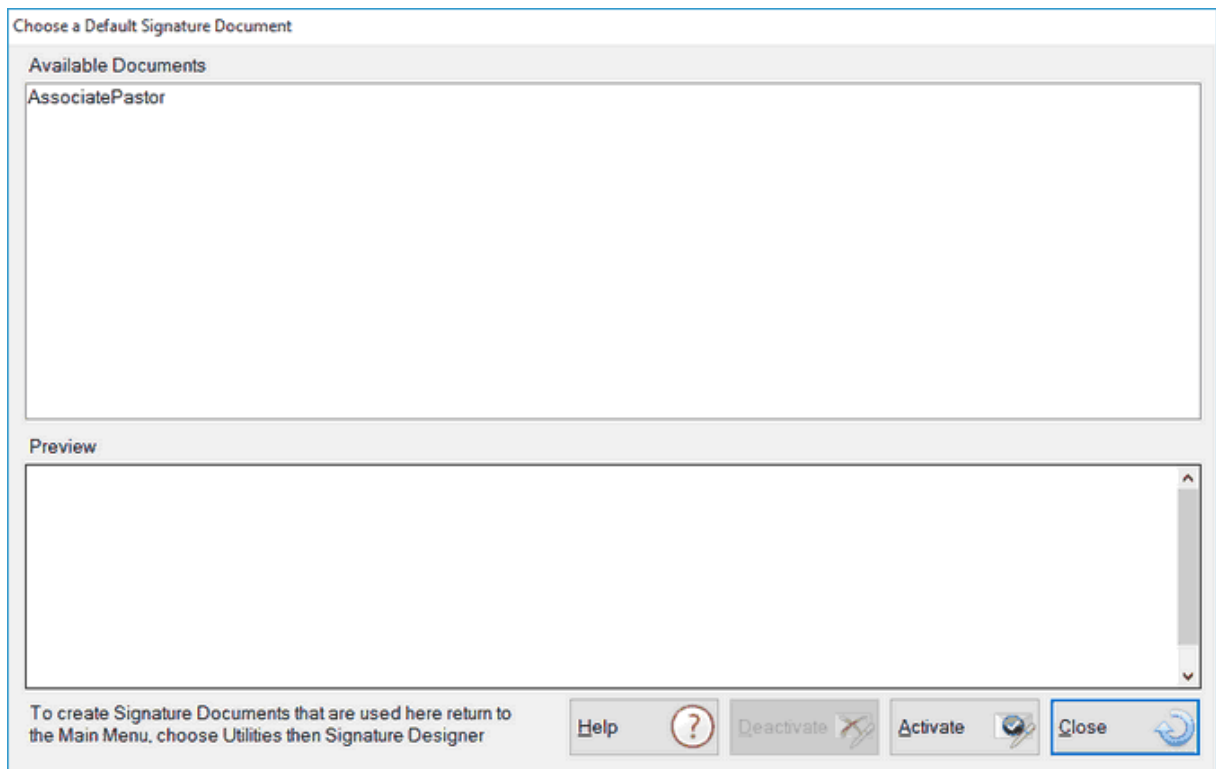
Tag	Surname	Given Name	Email Address
<input checked="" type="checkbox"/>	Carrow	Hellen	hellen.carrow@bellingstfellowship.org
<input type="checkbox"/>	Carrow	Peter	peter.carrow@bellingstfellowship.org
<input type="checkbox"/>	Kimmings	Jane	jane.kimmings@bellingstfellowship.org

< \_\_\_\_\_ >

Help ? Save  Close 



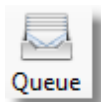
Use this Signature window to attach a signature to the bottom of your emails. Once attached, the signature will not be visible on the email edit window, it will be added as it is sent out.



To set a DEFAULT SIGNATURE for the current computer, simply select it from the list and press the Activate button.

To REMOVE the DEFAULT SIGNATURE, press the Deactivate button.

See [Email Signature Designer](#) for information on how to create a signature file.

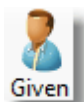


Queue

The Queue Button opens the standard Email Queue program. See [Email Queue](#) for full details.

### Compose Toolbar

Shown below are each of the Toolbar items on the Compose Email area of The Email Manager,



Given

Insert a field for a person's Given Name to be used in the email.



Colour

Set the colour of your text or background of text to any colour you desire!



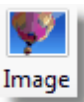
Surname

Insert a field for a person's Surname to be used in the email.



Clear

Erase the contents of the currently composed email.



Image

Insert an Image into the email. See [Image](#) for more details on this.



Spell

Access the Spell Checker Settings

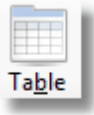




Insert text as a Hyperlink into the email. See [Hyperlink](#) for more details.



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.

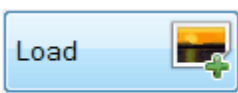


Insert a Table into the email. Tables are ideal for laying out an email with just the way you want to see it. Table borders can be transparent giving to the ability to place text and graphics in specific locations.



Load in a saved email for use. Naturally the loaded email can be edited and changed if required.

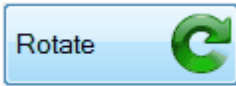
Click on each part of the Add Image box below to learn more about adding an image to an email. Note, once an image has been added to an email, you can select and re-size the image from the email itself before sending it out.



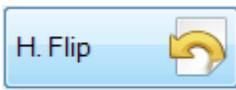
Load an image from a file to be added to the email.



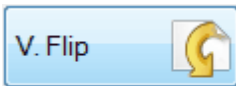
Add the selected (and modified if you have done any modifications) image to the current position in the email. Note once an image has been added, you can re-size the image directly in the email using the mouse to click and drag the corners of the image.



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



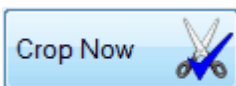
Flip the picture (mirror) horizontally.



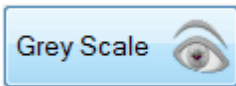
Flip the picture (mirror) vertically.



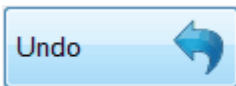
Select an area of the picture to crop.



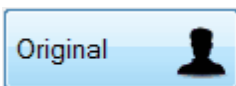
After marking an area with Crop, press the Crop Now button to complete the crop.



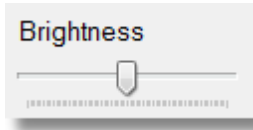
Convert the picture to grey tones only.



Where available, you can press this to undo the last edit to the picture.



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



Adjust the brightness of the picture.



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.



This shows a preview of the selected image to be inserted in the email.

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.

**Create Hypertext Link**

**Link text**  
Enter text to be displayed for the link

**Link location**  
Enter a web page location for the hyperlink

Cancel OK

### Font Options

Use the standard font controls for setting the font for the selected text, bold, italic underline etc.



### Subject

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.

### 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

Request 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.

### Create Method

Create Method

Force the email program to handle the emails as either Family or Individual Emails.

### Email Priority

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.

### Tag Untag



Press the Green tick icon to select all people to send a message to



Press the red Cross Icon to de-select all people

### Map

Use the built in interface for accessing a popular Web Based mapping program to see where people live. This is dependent on good address information in your records to function correctly.

### Help

Get Context Sensitive help on this area.

### Open File

Open the selected Registry Entry.

### Close

Close the Registry Area.

## Commitment

The Commitment Registry is an independent recording area that can record people from within and from outside your church database for any number of commitment events.

Some examples of these could be : Baptism, Infant Baptism, Confirmation, Membership etc. See [Registry](#) setup area for information on setting up the variables used in the area.



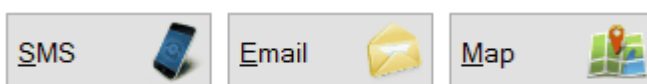
Click on each area of the Commitment screen shown below to learn more about this feature.

## Communication

Each Registry Area (Commitment, Wedding, Funeral) has the ability to communicate with people on the currently selected registry entry. The following 3 buttons are active when you have a registry record loaded.

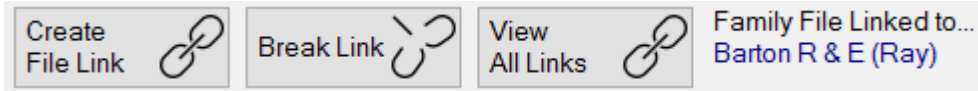


Click on each button for more information on each feature.



## Linking

Each registry area has the option to manually type in peoples names, and also to create a link with a family already in your database. The linking process links a file to the registry record, however all data is copied from the file and becomes static for the registry record. See [Registry Linking](#) for full details on this feature.



## Build List



Anywhere in the Registry area (and other areas of Pastoral Care) that you see the above button, you can press that button to add items to the list immediately to the left of that button.

## Commitment Details

Commitment Type	Baptism	▼	...
Location	St Lukes Church	▼	...
Officiating Person	Elder Stephen Lawson	▼	...

Select the Commitment Type, Location and Officiating person for your commitment record.

To add to each of these lists, you can use the [Build List](#) button, or use the [Registry](#) setup area.

## Committed Person Details

Surname	Hills
Given Name	Alison
Preferred Given	Ali
Middle Name	Jane
Title	Miss. ▼
Birth Date	20/03/1996
Place of Birth	Melbourne
Street	10 Hakea St
Suburb	Gisborne ▼ ...
Postcode	3444
State	Victoria ▼
Phone	54567423
Mobile	041234563
Email	ali@gmail.com

Fill in all the information about the individual who you are recording the commitment for.

This information is static, and even if you use [Linking](#) to bring in some details from a person on your database, the fields are filled in for you and can be modified without affecting the family file.

## Certificate and Date

Fill in the Certificate Number and the date of the Commitment Event here. If you do not use a Certificate Number, just leave it blank, or type NA for Not Applicable.

Commitment Date	01/02/2016
Certificate Number	B345

## Sponsors

If you have an Sponsors or Supporters for this event, record them here. Sponsor Types can be created using the [Build List](#) button or the [Registry](#) settings area.

<b>Sponsor 1</b>	Type	Baptism Supporter	▼	---
	Name	Bev Anderson		
<b>Sponsor 2</b>	Type	Baptism Supporter	▼	---
	Name	Sarah Mcdonal		

## Notes

Fill in any additional details in the notes area.

<b>Notes</b>
Has been seeking the Lord for a bit over 12 months in deciding if she is committed to the faith, this step is the result of her working through many personal issues in her life.

## Weddings

The Wedding Registry is an independent recording area that can record people from within and from outside your church database for a Wedding event. Everything you want to record about a wedding can be recorded here..



Click on each part of this window to learn more.

Registry (Church 1) (Belling Street Fellowship) (Auto Save Enabled)

File Help

Close Commitment **Weddings** Funerals Reports New Save Delete Previous Find Next Process Format ToolBox Help

Location Spirit Lane Church --- Wedding Date 15/01/2016 Submission Date 01/12/2013

Officiating Person Ps Fred Brown --- Witness 1 Bruce Thomas

Certificate Number M345 Witness 2 Lisa Craig

Groom Details Bride Details Notes

Create File Link Break Link View All Links Family File Linked to... Blackeby E & H (Frank) SMS Email Map

**Groom**

Surname Blackeby Conjugal Status Never Married No. of Marriages 0

Given Name Frank Street 55 Prince St

Preferred Given Middle Name Suburb Riddels Creek ---

Title Mr. --- Postcode 3412

Birth Date 03/04/1990 State VIC

Place of Birth Perth Phone 054-444-8754

Residency Period All His Life Mobile 041234567890

Occupation Technician --- Email ermie@spirit.com.au

Fathers Name Ermie Blackeby Mothers Name Helen Blackeby

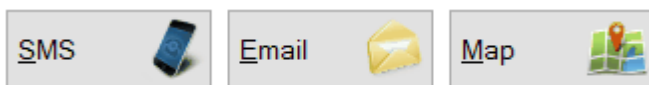
Fathers Birth Country Australia Mothers Birth Country Australia

## Communication

Each Registry Area (Commitment, Wedding, Funeral) has the ability to communicate with people on the currently selected registry entry. The following 3 buttons are active when you have a registry record loaded.

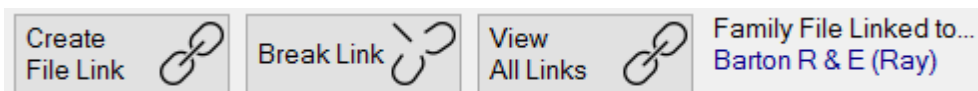


Click on each button for more information on each feature.



## Linking

Each registry area has the option to manually type in peoples names, and also to create a link with a family already in your database. The linking process links a file to the registry record, however all data is copied from the file and becomes static for the registry record. See [Registry Linking](#) for full details on this feature.





**Location**

Location Spirit Lane Church

Select the location of the Wedding. If the location does not exist in your list, press the [Build List](#) to the right of this option to add new list items.

**Officiating Person**

Officiating Person Ps Fred Brown

Select the Officiating Person who is registered to perform the wedding. If the officiating person does not exist in your list, press the [Build List](#) to the right of this option to add new list items.

**Certificate Number**

Certificate Number M345

Enter the wedding Certificate Number.

**Wedding Date**

Wedding Date 15/01/2016

Enter the date of the Wedding.

**Submission Date**

Submission Date 01/12/2013

Enter the date that the certificate was Submitted.

**Witness 1**

Witness 1 Bruce Thomas

Enter the name of the first witness.

**Witness 2**

Witness 2 Lisa Craig

Enter the name of the second witness.

**Groom Details**

Fill in all details for the groom, including the grooms Parents and their place of birth.

**Notes:**

Conjugal Status is the married state of the groom prior to this wedding. No Of Marriages is the number of marriages the groom has had prior to this wedding.

Groom Details		Bride Details		Notes	
<a href="#">Create File Link</a>		<a href="#">Break Link</a>		<a href="#">View All Links</a>	
Family File Linked to... Blackeby E & H (Frank)				<a href="#">SMS</a>	
				<a href="#">Email</a>	
				<a href="#">Map</a>	
<b>Groom</b>					
Surname	<input type="text" value="Blackeby"/>	Conjugal Status	<input type="text" value="Never Married"/>	No. of Marriages	<input type="text" value="0"/>
Given Name	<input type="text" value="Frank"/>	Street	<input type="text" value="55 Prince St"/>		
Preferred Given	<input type="text"/>	Suburb	<input type="text" value="Riddels Creek"/>		
Middle Name	<input type="text"/>	Postcode	<input type="text" value="3412"/>		
Title	<input type="text" value="Mr."/>	State	<input type="text" value="VIC"/>		
Birth Date	<input type="text" value="03/04/1990"/>	Phone	<input type="text" value="054-444-8754"/>		
Place of Birth	<input type="text" value="Perth"/>	Mobile	<input type="text" value="041234567890"/>		
Residency Period	<input type="text" value="All His Life"/>	Email	<input type="text" value="ernie@spirit.com.au"/>		
Occupation	<input type="text" value="Technician"/>				
Fathers Name	<input type="text" value="Ernie Blackeby"/>	Mothers Name	<input type="text" value="Helen Blackeby"/>		
Fathers Birth Country	<input type="text" value="Australia"/>	Mothers Birth Country	<input type="text" value="Australia"/>		

### Bride Details

Fill in all details for the groom, including the grooms Parents and their place of birth.

#### Notes:

Conjugal Status is the married state of the bride prior to this wedding. No Of Marriages is the number of marriages the bride has had prior to this wedding.

Groom Details		Bride Details		Notes	
<a href="#">Create File Link</a>		<a href="#">Break Link</a>		<a href="#">View All Links</a>	
Family File Linked to... Dimsey R & L (Sarah)				<a href="#">SMS</a>	
				<a href="#">Email</a>	
				<a href="#">Map</a>	
<b>Bride</b>					
Surname	<input type="text" value="Dimsey"/>	Conjugal Status	<input type="text" value="Never Married"/>	No. of Marriages	<input type="text" value="0"/>
Given Name	<input type="text" value="Sarah"/>	Street	<input type="text" value="7 Woods St"/>		
Preferred Given	<input type="text"/>	Suburb	<input type="text" value="Melton"/>		
Middle Name	<input type="text"/>	Postcode	<input type="text" value="3091"/>		
Title	<input type="text" value="Miss."/>	State	<input type="text" value="VIC"/>		
Birth Date	<input type="text" value="12/08/1990"/>	Phone	<input type="text" value="03-712-1478"/>		
Place of Birth	<input type="text" value="Darwin"/>	Mobile	<input type="text" value="041234567890"/>		
Residency Period	<input type="text" value="All Her Life"/>	Email	<input type="text" value="richardl@spirit.com.au"/>		
Occupation	<input type="text" value="Chemist"/>				
Fathers Name	<input type="text" value="Richard Dimsey"/>	Mothers Name	<input type="text" value="Lorraine Dimsey"/>		
Fathers Birth Country	<input type="text" value="Australia"/>	Mothers Birth Country	<input type="text" value="Australia"/>		

### Notes

Fill in any notes that you want to add to the record of marriage.

Groom Details	Bride Details	Notes
<p>They have requested at the night before their wedding that I bring a devotion to a gathering of both families, Time 7:30pm at the Dimsey house. Message Title I have chosen is Marriage and Christ</p>		

## Funerals

The Funeral Registry is an independent recording area that can record people from within and from outside your church database for a Funeral. Everything you want to record about a Funeral can be recorded here.



Click on each part of this window to learn more.

Registry (Church 1) (Belling Street Fellowship) (Auto Save Enabled)

File Help

Close Commitment Weddings **Funerals** Reports New Save Delete Previous Find Next Process Format ToolBox Help

Create File Link Break Link View All Links Family File Linked to... Barton R & E (Ray) SMS Email Map

**Deceased Details...**

Location Wesley Central Church ---

Officiating Person Elder Stephen Lawson ---

Funeral Directors Vanderson Brothers ---

Surname Barton

Given Name Ray

Preferred Given

Middle Name Stephen

Title Mr. ---

Birth Date 04/07/1965

Date Passed away 16/01/2016

Funeral Date 23/01/2016

Burial  Cremated

Interment Location Tongala Cemetery ---

Certificate Number D324

Notes Ray passed away in a car accident. Family have requested the funeral service to be turned into a praise service as Ray loved the Lord and always said he so looks forward to meeting his Lord.

**Surviving Relative Details...**

Relationship to Deceased Son

Surname Barton

Given David

Title Mr. ---

Street 8 King St

Suburb Sunbury ---

Postcode 3099

State VIC ---

Phone 03-744-1222

Mobile 041234567890

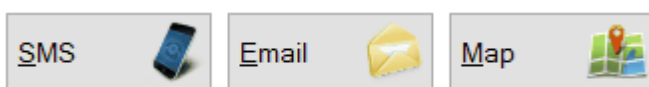
Email ray@spirit.com.au

## Communication

Each Registry Area (Commitment, Wedding, Funeral) has the ability to communicate with people on the currently selected registry entry. The following 3 buttons are active when you have a registry record loaded.

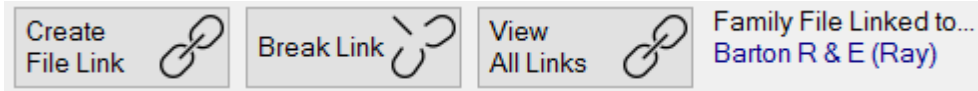


Click on each button for more information on each feature.



## Linking

Each registry area has the option to manually type in peoples names, and also to create a link with a family already in your database. The linking process links a file to the registry record, however all data is copied from the file and becomes static for the registry record. See [Registry Linking](#) for full details on this feature.



## Deceased Details

Fill in the details of the deceased. If you need to add a location, officiating person or funeral director to your list, just press the build button to the right of each field.

Deceased Details...	
Location	Wesley Central Church <input type="button" value="..."/>
Officiating Person	Elder Stephen Lawson <input type="button" value="..."/>
Funeral Directors	Vanderson Brothers <input type="button" value="..."/>
Surname	<input type="text" value="Barton"/>
Given Name	<input type="text" value="Ray"/>
Preffered Given	<input type="text"/>
Middle Name	<input type="text" value="Stephen"/>
Title	Mr. <input type="button" value="v"/>
Birth Date	<input type="text" value="04/07/1965"/>
Date Passed away	<input type="text" value="16/01/2016"/>
Funeral Date	<input type="text" value="23/01/2016"/>

## Surviving Relative Details

Fill in the details of the surviving relative.

**Surviving Relative Details...**

Relationship to Deceased	<input style="width: 95%;" type="text" value="Son"/>
Surname	<input style="width: 95%;" type="text" value="Barton"/>
Given	<input style="width: 95%;" type="text" value="David"/>
Title	<input style="text-align: right; font-size: small; color: #4F81BD; vertical-align: bottom; border: none; border-bottom: 1px solid #ccc;" type="text" value="Mr."/> <span style="font-size: 10px;">▼</span>
Street	<input style="width: 95%;" type="text" value="8 King St"/>
Suburb	<input style="text-align: right; font-size: small; color: #4F81BD; vertical-align: bottom; border: none; border-bottom: 1px solid #ccc;" type="text" value="Sunbury"/> <span style="font-size: 10px;">▼</span> <span style="font-size: 10px;">---</span>
Postcode	<input style="width: 95%;" type="text" value="3099"/>
State	<input style="text-align: right; font-size: small; color: #4F81BD; vertical-align: bottom; border: none; border-bottom: 1px solid #ccc;" type="text" value="VIC"/> <span style="font-size: 10px;">▼</span>
Phone	<input style="width: 95%;" type="text" value="03-744-1222"/>
Mobile	<input style="width: 95%;" type="text" value="041234567890"/>
Email	<input style="width: 95%;" type="text" value="ray@spirit.com.au"/>

## Notes

Enter any free form notes to store further details about this funeral.

## Certificate Number

Certificate Number	<input style="width: 95%;" type="text" value="D324"/>
--------------------	---

Enter the Death Certificate Number in this field.

## Interment Location

Interment Location	<input style="text-align: right; font-size: small; color: #4F81BD; vertical-align: bottom; border: none; border-bottom: 1px solid #ccc;" type="text" value="Tongala Cemetery"/> <span style="font-size: 10px;">▼</span> <span style="font-size: 10px;">---</span>
--------------------	---

Select the Interment Location. To add new Interment Locations to the list, press the build button to the right of this field.

## Burial - Cremated

<input checked="" type="radio"/> Burial	<input type="radio"/> Cremated
---	--------------------------------

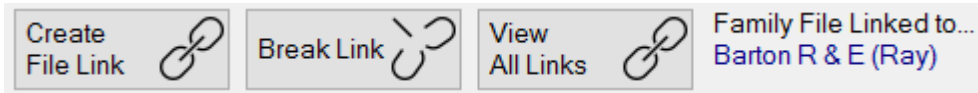
Select Burial or Cremated.

## Registry Linking

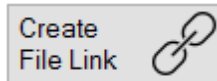
Each registry area has the option to manually type in peoples names, and also to create a link with a family already in your database. The linking process links a file to the registry record, however all data is copied from the file and becomes static for the registry record.



Click on each button for more information on each feature.

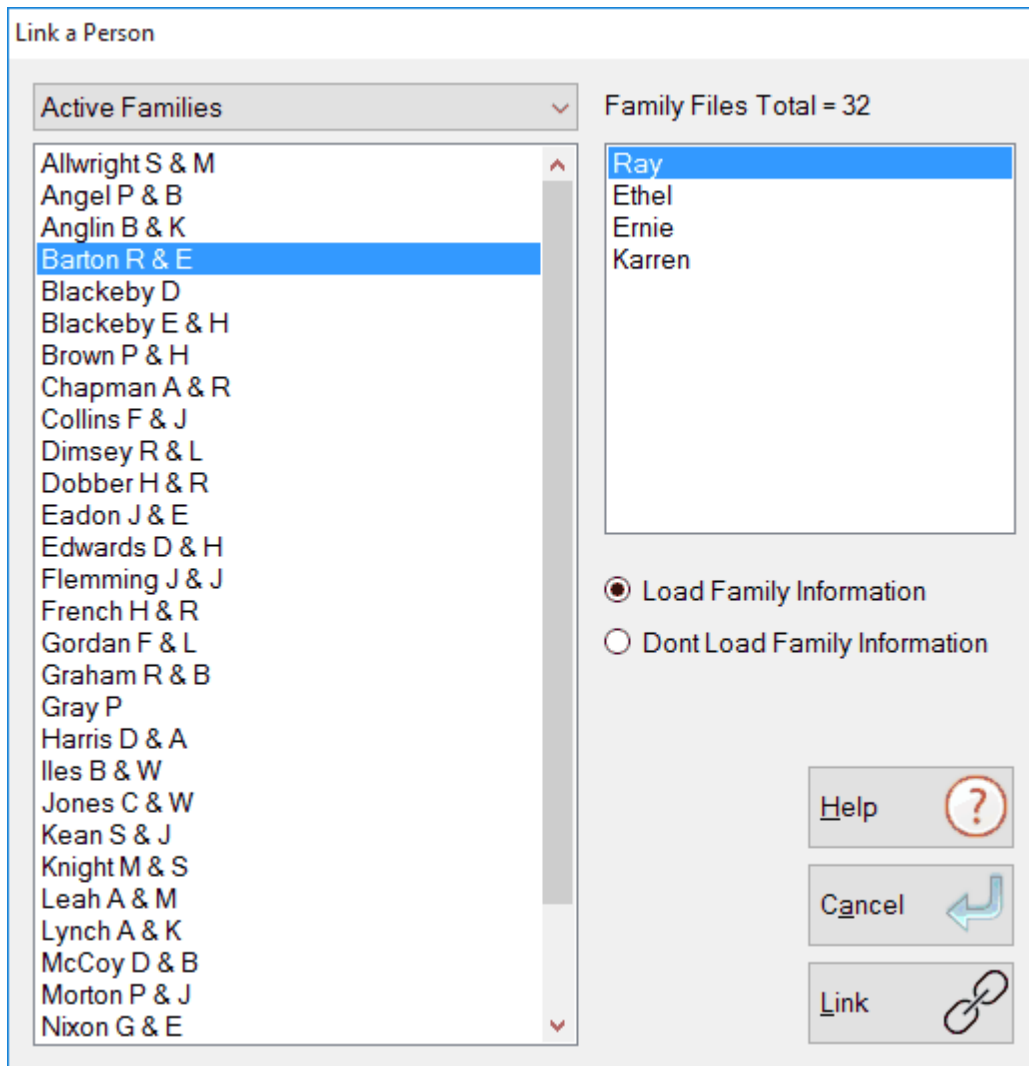


## Create File Link

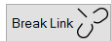


Use the Link function to create a link between a family file ( individual) and the registry entry.

By leaving the option Load Family Information checked, the contact information for the selected individual will be copied to the registry file.



## Break Link



Press the Break Link button to remove the link between the selected Family File and the Registry record. The saved information in the registry record including names and contact information will not be deleted.

## View All Links

Press the view all links button to see the following screen. This screen allows you to see all links in any registry area.



Click on each button for more information on each feature.

Links attached to Family File X

View All Links attached to a Specific Family (Graham R & B - Family File)  
 View All Registry Link Records  
 View All Commitment Links  
 View All Weddings Links  
 View All Funerals Links

Double Click on Record

Open Registry File  
 Open Family File

Date	Registry Type	Name on Registry Record	Family File Linked to
01/02/2016	Baptism	Hills Alison	Allwright S & M (Marion)
25/01/2016	Funerals	Graham Brook	Graham R & B (Brook)
23/01/2016	Funerals	Barton Ray	Barton R & E (Ray)
15/01/2016	Wedding (Bride)	Dimsey Sarah	Dimsey R & L (Sarah)
15/01/2016	Wedding (Groom)	Blackeby Frank	Blackeby E & H (Frank)

## View Mode

Select which records to see in the View All Links Window.

View All Links attached to a Specific Family (Graham R & B - Family File)  
 View All Registry Link Records  
 View All Commitment Links  
 View All Weddings Links  
 View All Funerals Links

### Double Click Mode

Set the default action to occur when you double click on a record in this window.

Double Click on Record

Open Registry File

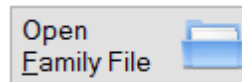
Open Family File

### Open Registry



Press this button to open the registry file of the selected entry in the list.

### Open Family



Press this button to open the linked Family File of the selected entry in the list.

### Currently Linked Family File

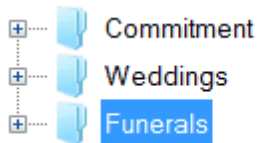
This shows the currently linked family file if one is linked.

## Reports

There are 3 reporting areas in the Registry area. One for each registry feature. [Commitment](#), [Weddings](#) and [Funerals](#)



Click on each item below to learn more.



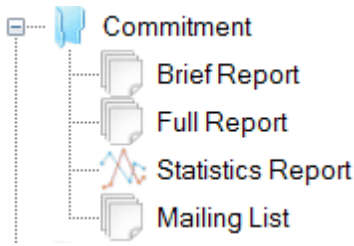
### Commitment

Each commitment report has a [Pre-Flight](#) window with filter options. Click on [Pre-Flight](#) for more information on the filters and settings available for the Commitment reports.



Click on each report name below for a sample report of what will be shown on each report.





**Pre-Flight**

Shown below is the Pre-Flight reporting window for Registry - Commitment reports.



Click on each part of the Pre-Flight window for more details.

**Commitment Setup**

Available Filters...  Allow page break after each record

Commitment Type

Location

Officiating Person

Sponsor Type

Filter by Year

Filter by Date  To

Order By..  Surname  Commitment Date

Pre Select Records before Running Report

**Allow Page Break after each record**

Allow page break after each record

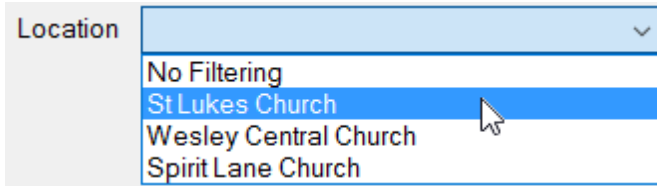
Tick this option when available, to force Pastoral Care to start a new page after each Registry Record.

**Commitment Type**

Commitment Type	<input type="text" value=""/> <ul style="list-style-type: none"> <li>No Filtering</li> <li style="background-color: #e0e0e0;">Baptism</li> <li>Church Membership</li> <li>Dedication</li> </ul>
-----------------	---

Select No Filtering to show All Commitment Type records, or select a Commitment Type from the list to include on the report. The actual types will be what you have setup in the Settings area for Registry. The items shown above are for demonstration / suggestion only.

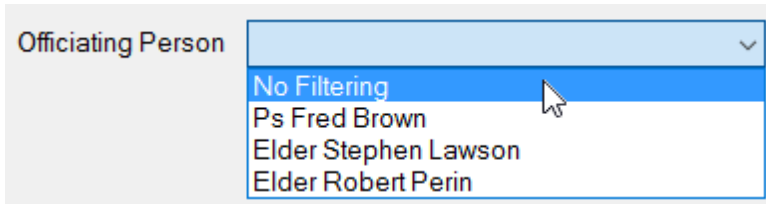
#### Location



Location	▼
No Filtering	
St Lukes Church	
Wesley Central Church	
Spirit Lane Church	

Select No Filtering to show All Commitment Type records, or select a Location from the list to include on the report. The actual Locations will be what you have setup in the Settings area for Registry. The items shown above are for demonstration / suggestion only.

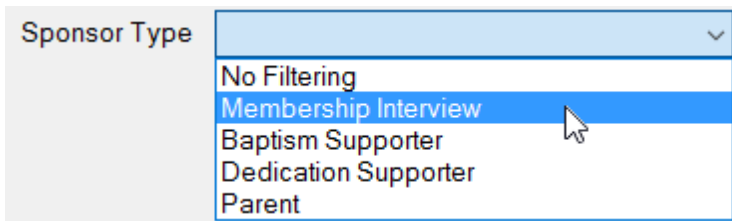
#### Officiating Person



Officiating Person	▼
No Filtering	
Ps Fred Brown	
Elder Stephen Lawson	
Elder Robert Perin	

Select No Filtering to show All Commitment Type records, or select an Officiating Person from the list to include on the report. The Officiating People to select from will be what you have setup in the Settings area for Registry. The items shown above are for demonstration / suggestion only.

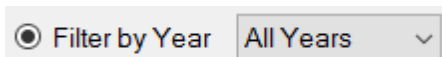
#### Sponsor Type



Sponsor Type	▼
No Filtering	
Membership Interview	
Baptism Supporter	
Dedication Supporter	
Parent	

Select No Filtering to show All Commitment Type records, or select a Sponsor Type from the list to include on the report. The Sponsor Types available to select from will be what you have setup in the Settings area for Registry. The items shown above are for demonstration / suggestion only.

#### Filter By Year



Filter by Year  Filter by Date Range

All Years ▼

Select a Calendar Year to search for records in. The default settings is All Years.

**Filter By Date**

Filter by Date    1/04/2016  To    30/01/2016 

Use the Filter By Date option to refine your report to a specific date range.

**Order By**

Order By..     Surname     Commitment Date






Select the Order of records to appear on the report. The default setting is Surname.

**Pre-Select Records**

Where a Pre-Select records option exists. The Following window is displayed allowing to select a number of records for your report simply by ticking them and pressing Continue. Use the Tag All / Untag All to select or deselect all records for the report.

Pre Select Records for Report

Select	Date	Commitment Type	Surname	Given
<input checked="" type="checkbox"/>	01/02/2016	Baptism	Hills	Alison
<input type="checkbox"/>	01/02/2016	Church Membership	Philips	Stephen

**Brief Report**

The Commitment Brief Report has a [Pre-Flight](#) window for filtering and selecting records. A Sample of the report is shown below.

Registry Commitment Report			
Date	Commitment	Surname	Given
01/02/2016	Baptism	Hills	Alison
01/02/2016	Church Membership	Philips	Stephen

## Full Report

The Commitment Full Report has a [Pre-Flight](#) window for filtering and selecting records. A Sample of the report is shown below.

### Registry Commitment Report

---

<b>Hills</b>	Alison	
<b>Linked To:</b> Angel P & B (Peter)		<b>Commitment Type:</b> Baptism
<b>Address:</b> 10 Hakea St Gisborne 3444 Victoria		<b>Commitment Date:</b> 01/02/2016
<b>Preffered Given:</b> Ali		<b>Location:</b> St Lukes Church
<b>Middle Name:</b> Jane		<b>Officiating Person:</b> Elder Stephen Lawson
<b>Title:</b> Miss.		<b>Baptism Supporter:</b> Bev Anderson
<b>Birth Date:</b> 20/03/1996		<b>Baptism Supporter:</b> Sarah Mcdonal
<b>Place of Birth:</b> Melbourne		<b>Certificate Number:</b> B345
		<b>Phone:</b> 54567423
		<b>Mobile:</b> 041234563
		<b>Email:</b> ali@gmail.com
<b>Notes:</b> Has been seeking the Lord for a bit over 12 months in deciding if she is committed to the faith, this step is the result of her working through many personal issues in her life.		
<b>Philips</b>	Stephen	
<b>Address:</b> 5 Smith St Keilor Downs 3040 Vic		<b>Commitment Type:</b> Church Membership
<b>Preffered Given:</b> Steve		<b>Commitment Date:</b> 01/02/2016
		<b>Location:</b> Wesley Central Church

## Statistics

The Commitment Statistics report is shown below. There are no pre-flight options for this report.

### Registry Commitment Statistics Report

Commitment Type	Total	Officiating	Total	Location	Total
Baptism	1	Ps Fred Brown	0	St Lukes Church	2
Church Membership	1	Elder Stephen Lawson	2	Wesley Central Church	0
Dedication	0	Elder Robert Perin	0	Spirit Lane Church	0

## Mailing List

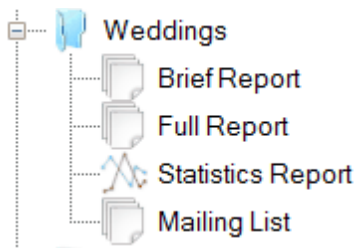
Use the Mailing List option to create a report for use on Mailing Label Sheets. See also [Mailing Labels](#) setup area for how to get Pastoral Care to print on your labels.

## Weddings

Each commitment report has a [Pre-Flight](#) window with filter options. Click on [Pre-Flight](#) for more information on the filters and settings available for the Wedding Reports.



Click on each report name below for a sample report of what will be shown on each report.



### Pre-Flight

Shown below is the Pre-Flight reporting window for Registry - Wedding reports.



Click on each part of the Pre-Flight window for more details.

**Weddings Setup**

**Available Filters...**

Location

Officiating Person

Use Preferred Given Name if Available

Filter by Year

Filter by Date  To

Order By..  Surname  Wedding Date

Pre Select Records before Running Report

### Location

Location

- No Filtering
- St Lukes Church
- Wesley Central Church
- Spirit Lane Church

Select No Filtering to show All Wedding records, or select a Location from the list to include on the report. The actual Locations will be what you have setup in the Settings area for Registry. The items shown above are for demonstration / suggestion only.

### Officiating Person

Officiating Person

No Filtering

Ps Fred Brown

Elder Stephen Lawson

Elder Robert Perin

Select No Filtering to show All Wedding records, or select an Officiating Person from the list to include on the report. The Officiating People to select from will be what you have setup in the Settings area for Registry. The items shown above are for demonstration / suggestion only.

### Filter By Year

Filter by Year All Years

Select a Calendar Year to search for records in. The default settings is All Years.

### Filter By Date

Filter by Date 1/04/2016 To 30/01/2016

Use the Filter By Date option to refine your report to a specific date range.

### Order By

Order By..  Surname  Commitment Date

Select the Order of records to appear on the report. The default setting is Surname.

### Pre-Select Records

Where a Pre-Select records option exists. The Following window is displayed allowing to select a number of records for your report simply by ticking them and pressing Continue. Use the Tag All / Untag All to select or deselect all records for the report.

Pre Select Records for Report

Select	Date	Commitment Type	Surname	Given
<input type="checkbox"/>	01/02/2016	Baptism	Hills	Alison
<input type="checkbox"/>	01/02/2016	Church Membership	Philips	Stephen

### Use Preferred Given Name

Tick this option to use an individuals preferred given name if available from the Pastoral Care Database.

**Brief Report**

The Wedding Brief Report has a [Pre-Flight](#) window for filtering and selecting records. A Sample of the report is shown below.

Registry Weddings Report				
Date	Groom Surname	Groom Given	Bride Surname	Bride Given
15/01/2016	Blackeby	Frank	Dimsey	Sarah
01/02/2016	Jonhston	Brian	Hicks	Jessica

## Full Report

The Wedding Full Report has a [Pre-Flight](#) window for filtering and selecting records. A Sample of the report is shown below.

Registry Weddings Report	
<b>Groom: Blackeby</b>	Frank
	<b>Bride: Dimsey</b>
	Sarah
<b>Wedding Date:</b> 15/01/2016 <b>Submission Date:</b> 01/12/2013 <b>Location:</b> Spirit Lane Church <b>Officiating Person:</b> Ps Fred Brown <b>Certificate Number:</b> M345 <b>Witness 1:</b> Bruce Thomas <b>Witness 2:</b> Lisa Craig	
<b>Groom Details...</b>	
Linked To: Blackeby E & H (Frank)	Phone: 054-444-8754
Title: Mr.	Mobile: 041234567890
Birth Date: 03/04/1990	Email: emie@spirit.com.au
Place of Birth: Perth	Address: 55 Prince St
Residency Period: All His Life	Riddels Creek 3412 VIC
Occupation: Technician	
No. of Marriages: 0	
Fathers Name: Emie Blackeby	
Fathers Birth Country: Australia	
Mothers Name: Helen Blackeby	
Mothers Birth Country: Australia	
<b>Bride Details...</b>	
Linked To: Dimsey R & L (Sarah)	Phone: 03-712-1478
Title: Miss.	Mobile: 041234567890
Birth Date: 12/08/1990	Email: richardl@spirit.com.au
Place of Birth: Darwin	Address: 7 Woods St
Residency Period: All Her Life	Melton 3091 VIC
Occupation: Chemist	
No. of Marriages: 0	
Fathers Name: Richard Dimsey	
Fathers Birth Country: Australia	
Mothers Name: Lorraine Dimsey	
Mothers Birth Country: Australia	
<b>Notes:</b> They have requested at the night before their wedding that I bring a devotion to a gathering of both families, Time 7:30pm at the Dimsey house. Message Title I have chosen is Marriage and Christ.	



## Statistics

The Wedding Statistics Report has a [Pre-Flight](#) window for filtering and selecting records. A Sample of the report is shown below.

Officiating	Total	Location	Total
Ps Fred Brown	2	St Lukes Church	0
Elder Stephen Lawson	0	Wesley Central Church	1
Elder Robert Perin	0	Spirit Lane Church	1

## Mailing List

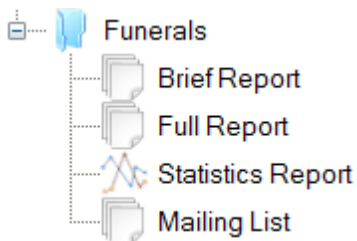
Use the Mailing List option to create a report for use on Mailing Label Sheets. See also [Mailing Labels](#) setup area for how to get Pastoral Care to print on your labels.

## Funerals

Each Funeral report has a [Pre-Flight](#) window with filter options. Click on [Pre-Flight](#) for more information on the filters and settings available for the Funeral reports.



Click on each report name below for a sample report of what will be shown on each report.



## Pre-Flight

Shown below is the Pre-Flight reporting window for Registry - Funeral reports.



Click on each part of the Pre-Flight window for more details.

**Funerals Setup**

Available Filters...  Allow page break after each record

Location

Officiating Person

Funeral Directors

Interment Location

Filter by Year

Filter by Date  To

Order By..  Surname  Funeral Date

Pre Select Records before Running Report

### Allow Page Break after each record

Allow page break after each record

Tick this option when available, to force Pastoral Care to start a new page after each Registry Record.

### Location

Location

- No Filtering
- St Lukes Church
- Wesley Central Church
- Spirit Lane Church

Select No Filtering to show All Funeral records, or select a Location from the list to include on the report. The actual Locations will be what you have setup in the Settings area for Registry. The items shown above are for demonstration / suggestion only.

### Officiating Person

Officiating Person

- No Filtering
- Ps Fred Brown
- Elder Stephen Lawson
- Elder Robert Perin

Select No Filtering to show All Funeral records, or select an Officiating Person from the list to include on the

report. The Officiating People to select from will be what you have setup in the Settings area for Registry. The items shown above are for demonstration / suggestion only.

### Funeral Directors

Select No Filtering to show All Funeral records, or select a Funeral Director from the list to include on the report. The Officiating People to select from will be what you have setup in the Settings area for Registry. The items shown above are for demonstration / suggestion only.

### Interment Location

Select No Filtering to show All Funeral records, or select an Interment Location from the list to include on the report. The Officiating People to select from will be what you have setup in the Settings area for Registry. The items shown above are for demonstration / suggestion only.

### Filter By Year

Select a Calendar Year to search for records in. The default settings is All Years.

### Filter By Date

Use the Filter By Date option to refine your report to a specific date range.

### Order By

Select the Order of records to appear on the report. The default setting is Surname.

### Pre-Select Records

Where a Pre-Select records option exists. The Following window is displayed allowing to select a number of records for your report simply by ticking them and pressing Continue. Use the Tag All / Untag All to select or deselect all records for the report.

Pre Select Records for Report

Select	Date	Commitment Type	Surname	Given
<input checked="" type="checkbox"/>	01/02/2016	Baptism	Hills	Alison
<input type="checkbox"/>	01/02/2016	Church Membership	Philips	Stephen

### Brief Report

The Funeral Brief Report has a [Pre-Flight](#) Window for filtering and selecting records. A Sample of the report is shown below.

**Registry Funerals Report**

Date	Surname	Given	Funeral Directors
23/01/2016	Barton	Ray	Vanderson Brothers
25/01/2016	Graham	Brook	Serenity Ladies

## Full Report

The Funeral Full Report has a [Pre-Flight](#) Window for filtering and selecting records. A Sample of the report is shown below.

### Registry Funerals Report

---

<p><b>Deceased Details...</b></p> <p>Surname: Barton          Given: Ray          Linked To: Barton R &amp; E (Ray)          Location: Wesley Central Church          Officiating Person: Elder Stephen Lawson          Funeral Directors: Vanderson Brothers          Middle Name: Stephen          Title: Mr.          Birth Date: 04/07/1965          Passed Away: 16/01/2016          Funeral Date: 23/01/2016          Internment Type: Burial          Interment: Tongala Cemetery          Certificate Number: D324</p> <p><b>Notes:</b> Ray passed away in a car accident. Family have requested the funeral service to be turned into a praise service as Ray loved the Lord and always said he so looks forward to meeting his Lord.</p>	<p><b>Surviving Relative Details...</b></p> <p>Relationship: Son          Surname: Barton          Given: David          Title: Mr.          Address: 8 King St          Sunbury 3099 VIC          Phone: 03-744-1222          Mobile: 041234567890          Email: ray@spirit.com.au</p>
--	---

---

<p><b>Deceased Details...</b></p> <p>Surname: Graham          Given: Brook          Linked To: Graham R &amp; B (Brook)          Location: St Lukes Church          Officiating Person: Ps Fred Brown</p>	<p><b>Surviving Relative Details...</b></p> <p>Relationship: Son          Surname: Graham          Given: Brian          Title: Mr.          Address: 42 Station Road          Sunbury 3099 VIC</p>
---	---

## Statistics

The Funeral Statistics Report has a [Pre-Flight](#) Window for filtering and selecting records. A Sample of the report is shown below.

### Funerals Statistics Report

Funeral Directors	Total	Officiating	Total	Location	Total
Vanderson Brothers	1	Ps Fred Brown	1	St Lukes Church	1
Serenity Ladies	1	Elder Stephen Lawson	1	Wesley Central Church	1
Sunset Funerals	0	Elder Robert Perin	0	Spirit Lane Church	0
White Family Memorials	0				

**Mailing List**

Use the Mailing List option to create a report for use on Mailing Label Sheets. See also [Mailing Labels](#) setup area for how to get Pastoral Care to print on your labels.

## Venue Booking

Brand new in Pastoral Care 14, Venue Booking is to your building, what Rosters is to your people!

The Venue Booking feature can be found on the Church Tab. This powerful feature lets you manage your church building(s) and rooms, and record / manage bookings for these rooms. This allows you to see when your facilities are in use, and when they are available.

### Setting Up

To use this feature, you will need to configure Pastoral Care so that it knows what venues and rooms you have that are available for use. See [Venue Booking](#) in the setup area for information on how to complete the setup procedures for this feature.



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

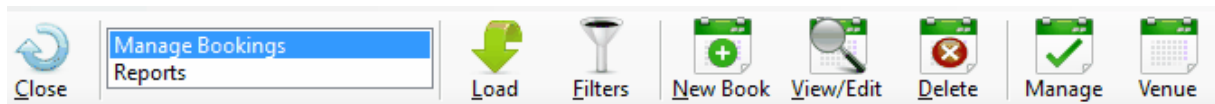
Date	Start	Finish	Room	Event	Contact Person
19/12/2015 (Sat)	07:00 PM	10:00 PM	Church Worship Auditorium Kitchen	Youth Group	Alister Davies
20/12/2015 (Sun)	09:30 AM	12:00 PM	Church Worship Auditorium Vestry Meeting Room Sunday School Room 1 Sunday School Room 2 Kitchen	Morning Church Service	Brian Smith
20/12/2015 (Sun)	07:00 PM	09:00 PM	Church Worship Auditorium Vestry Kitchen	Evening Church Service	Peter Blackmore
21/12/2015 (Mon)	07:00 PM	09:30 PM	Meeting Room	Bible Study - Marks Group	Mark Billing
22/12/2015 (Tue)	08:00 PM	10:00 PM	Sunday School Room 1	Toms Bible Study Group	Tom Clean
23/12/2015 (Wed)	07:00 PM	10:00 PM	Meeting Room	Leadership Meeting	Don Anderson
25/12/2015 (Fri)	10:00 AM	01:00 PM	Meeting Room Kitchen	Ladies Bible Study	Grace King

### Toolbar

Shown below is the main toolbar of the Venue Booking feature.



Click on each of the icons below for more information on each area.



### Close



Exit the Venue Booking Area. All changes are saved automatically.

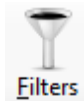
### Load



Load in the booking with any currently selected [Filters](#)

If you have made any changes to the [On Screen Filters](#), you will need to press the Load button to refresh your view.

### Filters



Press the Filters button to show the following window.



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

**Filters**

Rooms ✓ ✕

- Church Worship Auditorium
- Vestry
- Meeting Room
- Sunday School Room 1
- Sunday School Room 2
- Kitchen

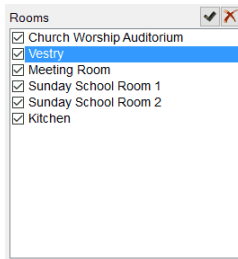
Event  Partial Match  Full Match

Administrator

Help ?
Clear ✕
Load ↓

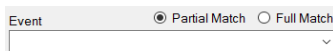


## Rooms



Tick the rooms you want to include on the Venue Booking grid. Use the Tick and Cross icons above this list to Tag All or Untag all list items.

## Event



Type in all or part of an event name to search for. Partial match will find some of the text entered, and full match is looking for an exact match.

## Administrator



Select the booking administrator to search for. An Administrator is usually the person making the booking in Pastoral Care.

## Clear



Clear the filters.

## Load



Load the Registry window again with the applied filters.

## New



**New Book** Press the New Book button to create a new room booking. The following screen is loaded.



Click on each area on the sample windows below for more information.

**Edit Booking**

Time   Period   Finish Time: 01:00 PM

By Date  Wednesday, 23 December 2015 to Wednesday, 23 December 2015

By Pattern 1   1st  2nd  3rd  4th  5th  of Every Month

By Pattern 2  Every  Start  on  Finish

\* Event  \* Rooms  Church Worship Auditorium  
 Vestry  
 Meeting Room  
 Sunday School Room 1  
 Sunday School Room 2  
 Kitchen

\* Administrator

Booking Created

Contact Surname  Contact Name   
 Contact Phone  Contact Mobile   
 Contact Email

Alert Reminder  Days before Booking Date

Notes

\* = Required Fields

Update Booking  New  Exclusion Dates  Check Conflict  Shared Venue  Delete  SMS  Email  Help  Close

### Booking Time

Time   Period   Finish Time: 09:00 PM

Enter a time for the booking to start, and enter the Period in hours:minutes. The calculated finish time will be shown.

You can also use the [Default Time](#) and [Default Period](#) buttons to select a or set and select any defaults.

### Default Time

Default Time

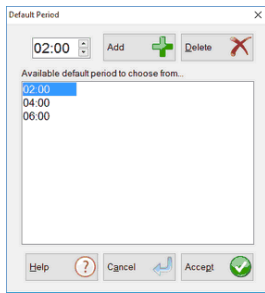
Available default times to choose from...



Pressing the Default Button shows the following window. Here you can enter a time, and press the Add Button to create a default time that can be selected for use for a room booking.

To use a default time, simply select it and press Accept.

## Default Period



Pressing the Default Button shows the following window. Here you can enter a default period in Hours:Minutes, and press the Add Button to create a default period that can be selected for use for a room booking.

To use a default period, simply select it and press Accept.

## Booking Dates

There are 3 different types of date options for bookings. By Date, By Pattern 1 and By Pattern 2.

By Date <input checked="" type="radio"/>	Saturday , 2 December 2017	to	Saturday , 2 December 2017
By Pattern 1 <input checked="" type="radio"/>	<input type="checkbox"/> 1st <input type="checkbox"/> 2nd <input type="checkbox"/> 3rd <input type="checkbox"/> 4th <input type="checkbox"/> 5th		Sunday of Every Month
By Pattern 2 <input checked="" type="radio"/>	Every <input type="text" value="Week"/>	Start	Sunday , 27 December 2015
	on <input type="text" value="Sunday"/>	Finish	Sunday , 27 December 2015

### By Date

This is perfect for a once off event. For example, a Celebration Party, Wedding, Funeral, Special Church Members Meeting etc. Simply select the Date range in the From and To fields to set the period.

### Pattern 1

Pattern 1 is designed for perpetual bookings that have no foreseeable ending. For example, a regular Church Service etc. Simply select the pattern and day to suit, and that booking will go on forever until it is modified or deleted.

### Pattern 2

Pattern 2 is designed for long term bookings that have a start and end date. Simply select the pattern and date range for that booking to be active for. One xmples of this could be a seasonal booking that only goes for a term, or a season.

### Event & Contact Information

Enter all the fields here to further define your booking.



The Build button next to a field indicates that you can add to the list of items for that field.



Press this button to open a selection window to choose a person from your Pastoral Care database to populate the contact information with.

* Event	Baker Wedding	...
* Administrator	Brown Peter	...
Booking Created	Thursday , 22 December 2016	
Contact Surname	Baker	
Contact Name	Graeme	
Contact Phone	03-999-999-999	
Contact Mobile	0400-0400-0400	
Contact Email	graeame@thebakers.com.au	
Alert Reminder	14	Days before Booking Date

**Notes:** The Alert Reminder will set Pastoral Care a task to remind you x number of days before an event that a booking is coming up. Alert are calculated each time Pastoral Care Starts up.

**Administrators** are people who make the room Booking.

### Rooms

Tick the rooms that are required for your booking.



Press this Build button to add more rooms to your venue.



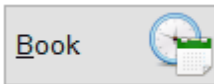
Use the Tick button to tick all rooms for a booking, or use the Cross button to un-tick all rooms.

* Rooms			...
<input checked="" type="checkbox"/>	Church Worship Auditorium		
<input type="checkbox"/>	Vestry		
<input type="checkbox"/>	Meeting Room		
<input type="checkbox"/>	Sunday School Room 1		
<input type="checkbox"/>	Sunday School Room 2		
<input type="checkbox"/>	Kitchen		

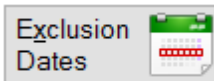
### Notes

Use the Notes field to fill in any extra information about the booking that you may want to record.

Notes	<div style="border: 1px solid gray; height: 80px; width: 100%;"></div>
* = Required Fields	

**Book**

Press this button to SAVE the currently filled in new booking. This will create the booking checking for conflicts as it saves.

**Exclusion Dates**

Exclusion dates are only available, and only relevant for Pattern 1 or Pattern 2 bookings. Where a pattern exists (say Every Sunday) you can enhance that formula with a number of Exclusion Dates to say when that permanent booking is NOT running. (For example on School Holidays etc)

Pattern Booking Exclusions

Start Date	End Date
23/12/2016	30/12/2016

Friday , 23 December 2016

To

Friday , 30 December 2016

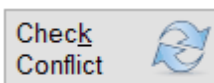
Add

Remove

Help

Cancel

Close

**Check Conflict**

Press the Check Conflict button to display any booking conflicts in the following window.

From here you can see exactly what is requested (top right corner) and the existing bookings that this new one will conflict with.

Pressing Email or SMS will let you create a message for dealing with this conflict with the Contact Person on this screen.

Booking Conflict
✕

Conflicts Conflict # 1

Booking

1st,2nd,3rd,4th,5th Sunday of every Month  
 Time - 09:30 AM  
 Period - 2:30 HR  
 Finish Time - 12:00 PM

Booking Type Pattern Booking Type 1

---

Rooms Church Worship Auditorium ▲

Vestry

Meeting Room

Sunday School Room 1

▼

Event Morning Church Service

Administrator Chapman Ruth

Booking Created Sunday, 3 January 2016

Contact Surname Smith

Contact Name Brian

Contact Phone 54678983

Contact Mobile 04563345566

Contact Email brian@gmail.com

Alert Reminder  Days before Booking Date

Exclusion Dates

Kitchen has been booked so that an afternoon tea can be served after church

Help

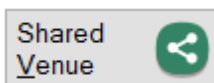
Email

SMS

View All

Close

### Shared Venue



This powerful feature lets you see what room bookings are shared within the venue at or around the same time. This allows you to see at a glance what else is on in the venue at the same time you want to create a booking for another area of the venue. Use the SMS and Email buttons to communicate with the Contact Person shown on this form.

Shared Venue Bookings

Same Day Bookings  
 Same Time Bookings

Booking: 1st,2nd,3rd,4th,5th Sunday of every Month  
 Time - 09:30 AM  
 Period - 2:30 HR  
 Finish Time - 12:00 PM

Booking Type: Pattern 1 Booking

Rooms: Church Worship Auditorium  
 Vestry  
 Meeting Room  
 Sunday School Room 1

Event: Morning Church Service

Administrator: Chapman Ruth

Booking Created: Sunday, 3 January 2016

Contact Surname: Smith

Contact Name: Brian

Contact Phone: 54678983

Contact Mobile: 04563345566

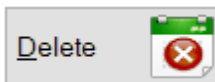
Contact Email: brian@gmail.com

Alert Reminder:  Days before Booking Date

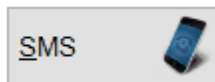
Exclusion Dates:

Kitchen has been booked so that an afternoon tea can be served after church

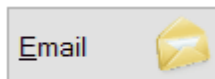
Help ? Email SMS View All Close

**Delete**

Press this when available (viewing an existing booking record) to delete that booking. BOOKING deletions cannot be undone.

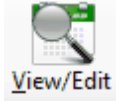
**SMS**

Press the SMS button to compose and send an SMS message to the Contact person for the currently displayed booking.

**Email**

Press the Email button to compose and send an Email message to the Contact person for the currently displayed booking.

### View/Edit



Press this button to load the [Edit Booking](#) window.

### Venue



Press the [Venue](#) button to see a Month by Month Calendar view.

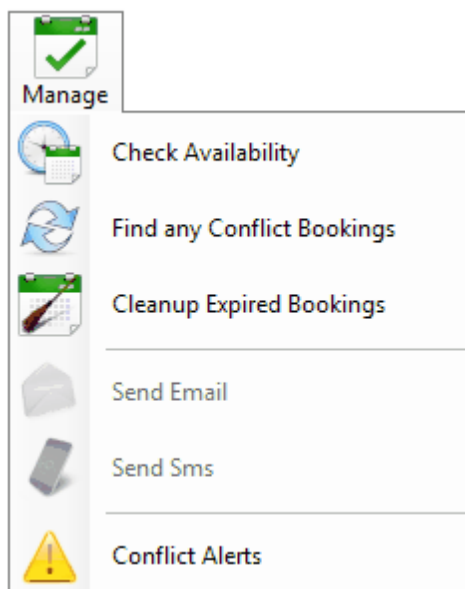
### Delete



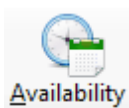
Press Delete to remove the currently displayed booking. Please note, Deleting a booking **cannot** be undone.

### Manage

Pressing the Manage icon on the Bookings Toolbar shows the following menu. Click on each menu item for more information on each Booking Management feature.



### Check Availability



Use the Check Availability option to check if there are any conflicts before your create a booking.



See [Availability](#) for full details

### Find Conflict Bookings



Find any Conflict Bookings

Press the Find Any Conflict Bookings on the [Manage](#) toolbar menu so show a windows with any conflicting bookings. If none exist, you will be told there are no conflicting bookings.



Click on each of the icons below for more information on each area.

Conflicts	Booking	Start	Finish	Room	Event
1	Saturday, 26 December 2015	06:00 PM	02:00 AM	Kitchen	Boxing Day Food Prep
1	1st,2nd,3rd,4th,5th Saturday of every Month	07:00 PM	03:00 AM	Church Worship Auditorium Kitchen	Youth Group

### Venue

Venue

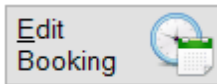
This shows the venue that the booking conflict occurs at.

### Double Click

Double Click  Edit Booking  View Conflicts

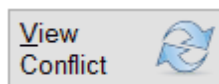
Set for a mouse double click to either Edit the selected booking, or show the Conflicts window.

### Edit Booking



Press the Edit Booking button to edit the currently selected (conflicted) booking.

### View Conflict



Press the View Conflict button to show the details of the selected (conflicted) booking.



Click on each part of the window below for more information on each area. test me

Booking Conflict

Conflicts **Conflict # 1**

Booking  
 Saturday, 26 December 2015  
 Time - 06:00 PM  
 Period - 2:0 HR  
 Finish Time - 08:00 PM

Booking Type **Fixed Date Booking**

Rooms **Kitchen**

Event **Boxing Day Food Prep**

Administrator **Angel Belinda**

Booking Created **Friday, 25 December 2015**

Contact Surname **Eadon**

Contact Name **Edith**

Contact Phone

Contact Mobile **041234567890**

Contact Email **jack@spirit.com.au**

Alert Reminder  Days before Booking Date

Exclusion Dates

Help ? Email SMS View All Close

### Conflicts

This field shows the number of conflicts you can select from to see. This is usually just showing the currently selected conflict.

Conflicts **Conflict # 1**

### Booking

This section shows the booking date / time and the type of booking.

Booking  
 Sunday, 27 December 2015  
 Time - 07:00 PM  
 Period - 2:0 HR  
 Finish Time - 09:00 PM

Booking Type **Fixed Date Booking**

## Booking Details

This section shows the details of the booking

This information can be used to help you decide which of the conflicted bookings is going to be easier to edit, move or delete!

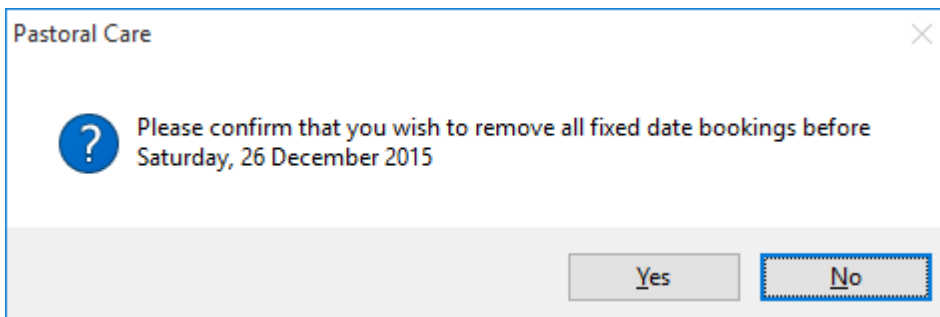
Rooms	<input type="text" value="Kitchen"/>
Event	<input type="text" value="Home Group Cooking Evening"/>
Administrator	<input type="text" value="Brown Peter"/>
Booking Created	<input type="text" value="Saturday, 26 December 2015"/>
Contact Surname	<input type="text" value="Dobber"/>
Contact Name	<input type="text" value="Ruby"/>
Contact Phone	<input type="text"/>
Contact Mobile	<input type="text" value="041234567890"/>
Contact Email	<input type="text" value="hugo@spirit.com.au"/>
Alert Reminder	<input type="checkbox"/> Days before Booking Date
Exclusion Dates	<input type="text"/>

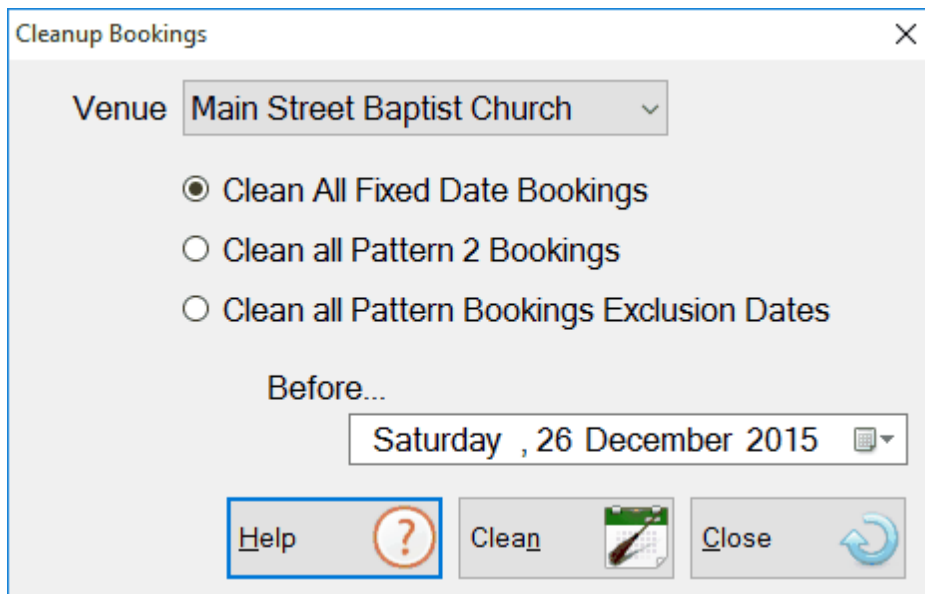
## Cleanup Expired Bookings

This feature lets you clean out old Fixed Date and Pattern 2 bookings. Pattern 1 bookings cannot be cleared from here as a pattern booking does not have an active date range.

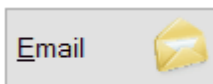
Simply Select the venue, then select the date type (Fixed Dates, Pattern 2, or Pattern Booking Exclusion Dates), then select a date to start from, and when you press Clean, Pastoral Care will erase all selected data from the selected date and moving backwards in date order to all data that exists BEFORE the date entered here.

You are presented with a warning before this is done, and please note, apart from restoring a backup, this delete cannot be undone.



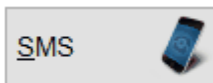


### Send Email



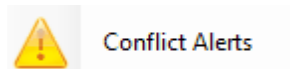
Whenever available, you can use the Send Email button to send a text message to the booking contact person.

### Send SMS



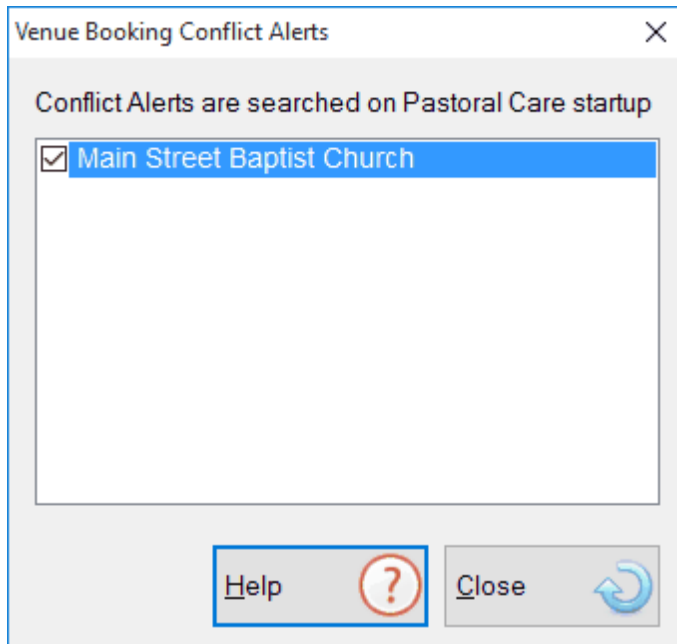
Whenever available, you can use the Send SMS button to send a text message to the booking contact person.

### Conflict Alerts



The Conflict alerts option available from the Venue Booking / Manage toolbar menu allows you to manage alerts for upcoming bookings.

Tick the venue(s) that you want to have checked for booking alerts each time Pastoral Care starts.



## On Screen Filters

The following controls above the Booking Grid are available for controlling what is shown in the Grid.



Click on each part of this window below

Venue Main Street Baptist Church	Records To Load Booking Calendar	Calendar Date Range Tuesday, 1 December 2015
<input checked="" type="radio"/> Dates Ascending <input type="radio"/> Dates Descending	<input type="checkbox"/> Shade Alternate Days	To: Friday, 25 December 2015

Date	Start	Finish	Room	Event	Contact Person
01/12/2015 (Tue)	08:00 PM	10:00 PM	Sunday School Room 1	Toms Bible Study Group	Tom Clean

## Venue

Venue  
Main Street Baptist Church

Select the Venue are working with. Venues can be defined in [Venue Booking](#) settings area.

## Date Order

Dates Ascending  Dates Descending

Select the order of dates in the grid. After making a change to this setting, you will need to press the [Load](#) button to refresh the window to the new settings.

## Records to Load

Records To Load  
Booking Calendar

This option lets you see different types of bookings in the Booking Grid. The following options are available.

<b>Booking Calendar</b>	Show all bookings that are coming up in the <a href="#">Date Range</a> settings.
<b>All Bookings</b>	Show all bookings, regardless of type or date range.
<b>All Fixed Date Bookings</b>	Show all bookings that occur on a single date. (Not any pattern bookings)
<b>All Pattern 1 Bookings</b>	Show all Pattern 1 Bookings
<b>All Pattern 2 Bookings</b>	Show all Pattern 2 Bookings
<b>Expired Fixed Bookings</b>	Show Expired Fixed Bookings. These are fixed date bookings that are past their event date.
<b>Expired Pattern 2 Bookings</b>	Show Expired Pattern 2 Bookings. These are pattern 2 bookings that are past their event date range.

## Shading

Shade Alternate Days

Tick this option then press LOAD on the toolbar to shade alternate days, making different days easier to see.

## Date Range

Calendar Date Range

Tuesday . 1 December 2015 ▾

To Friday . 25 December 2015 ▾

Select or enter the range of dates you want to display in the booking grid. You will need to press the Load button to refresh the view after changing the dates here.

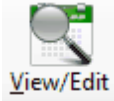
## Manage Bookings

Using the main [Venue Booking](#) Window you can easily create new bookings, review existing bookings, and communicate with people who are involved in your bookings.

Use the [On Screen Filters](#) and the [Filters](#) button on the toolbar to change the display of bookings on this form. (Don't forget to press Load on the toolbar to refresh the booking form when you change a filter or on screen filter.

Another easy way to see what is going on and manage your bookings is to use the [Venue \(Calendar View\)](#) button on the toolbar.

## Edit Booking



Press the View / Edit button on the toolbar to view and or edit an existing room booking. The following screen is loaded.



Click on each area on the sample window below for more information.

**Time**   **Period**   **Finish Time:** 01:00 PM

**By Date**   to

**By Pattern 1**   1st  2nd  3rd  4th  5th  of Every Month

**By Pattern 2**  Every  on  Start  Finish

**\* Event**

**\* Administrator**

**Booking Created**

**Contact Surname**

**Contact Name**

**Contact Phone**

**Contact Mobile**

**Contact Email**

**Alert Reminder**  Days before Booking Date

**\* Rooms**

- Church Worship Auditorium
- Vestry
- Meeting Room
- Sunday School Room 1
- Sunday School Room 2
- Kitchen

**Notes**

\* = Required Fields

## Booking Time

**Time**   **Period**   **Finish Time:** 09:00 PM

Enter a time for the booking to start, and enter the Period in hours:minutes. The calculated finish time will be shown.

You can also use the [Default Time](#) and [Default Period](#) buttons to select a or set and select any defaults.

### Default Time



Pressing the Default Button shows the following window. Here you can enter a time, and press the Add Button to create a default time that can be selected for use for a room booking.

To use a default time, simply select it and press Accept.

The image shows a dialog box titled "Default Time" with a close button (X) in the top right corner. At the top, there is a text input field containing "09:00 AM" with up and down arrow icons on the right. To the right of the input field are two buttons: "Add" with a green plus sign icon and "Delete" with a grey X icon. Below this is a list box titled "Available default times to choose from..." containing three entries: "09:00 AM", "07:00 PM", and "08:00 PM". At the bottom of the dialog box are three buttons: "Help" with a question mark icon, "Cancel" with a blue left-pointing arrow icon, and "Accept" with a green checkmark icon. The "Help" button is highlighted with a blue border.

### Default Period



Pressing the Default Button shows the following window. Here you can enter a default period in Hours:Minutes, and press the Add Button to create a default period that can be selected for use for a room booking.

To use a default period, simply select it and press Accept.



## Booking Dates

There are 3 different types of date options for bookings. By Date, By Pattern 1 and By Pattern 2.

## By Date

This is perfect for a once off event. For example, a Celebration Party, Wedding, Funeral, Special Church Members Meeting etc. Simply select the Date range in the From and To fields to set the period.

You can also use this feature to block out a number of rooms for events like Conferences, or even for scheduling room maintenance.

## Pattern 1

Pattern 1 is designed for perpetual bookings that have no foreseeable ending. For example, a regular Church Service etc. Simply select the pattern and day to suit, and that booking will go on forever until it is modified or deleted.

## Pattern 2

Pattern 2 is designed for long term bookings that have a start and end date. Simply select the pattern and date range for that booking to be active for. One example of this could be a seasonal booking that only goes for a term, or a season.

## Event & Contact Information

Enter all the fields here to further define your booking.



The Build button next to a field indicates that you can add to the list of items for that field.



Press this button to open a selection window to choose a person from your Pastoral Care database to populate the contact information with.

The **Alert Reminder** when filled in will set Pastoral Care a task to remind you x number of days before an event that a booking is coming up.

* Event	Baker Wedding	...
* Administrator	Brown Peter	...
Booking Created	Thursday . 22 December 2016	
Contact Surname	Baker	
Contact Name	Graeme	
Contact Phone	03-999-999-999	
Contact Mobile	0400-0400-0400	
Contact Email	graeame@thebakers.com.au	
Alert Reminder	14	Days before Booking Date

## Rooms

Tick the rooms that are required for your booking.



Press this Build button to add more rooms to your venue.



Use the Tick button to tick all rooms for a booking, or use the Cross button to un-tick all rooms.

* Rooms	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...
<input checked="" type="checkbox"/>	Church Worship Auditorium		
<input type="checkbox"/>	Vestry		
<input type="checkbox"/>	Meeting Room		
<input type="checkbox"/>	Sunday School Room 1		
<input type="checkbox"/>	Sunday School Room 2		
<input type="checkbox"/>	Kitchen		

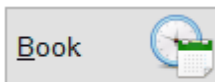
## Notes

Use the Notes field to fill in any extra information about the booking that you may want to record.

Notes

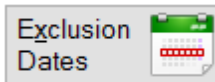
\* = Required Fields

## Book



Press this button to **SAVE** the currently filled in new booking. This will create the booking checking for conflicts as it saves.

## Exclusion Dates



Exclusion dates are only available, and only relevant for Pattern 1 or Pattern 2 bookings. Where a pattern exists (say Every Sunday) you can enhance that formula with a number of Exclusion Dates to say when that permanent booking is NOT running. (For example on School Holidays etc)

**Pattern Booking Exclusions** ✕

Start Date	End Date	
23/12/2016	30/12/2016	<div style="display: flex; justify-content: space-between;"> <span>Friday , 23 December 2016</span> <span>▼</span> </div> <p style="text-align: center;">To</p> <div style="display: flex; justify-content: space-between;"> <span>Friday , 30 December 2016</span> <span>▼</span> </div>

Add
+

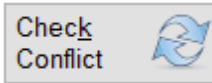
Remove
✕

Help
?

Cancel
↩

Close
↻

## Check Conflict



Press the Check Conflict button to display any booking conflicts in the following window.

From here you can see exactly what is requested (top right corner) and the existing bookings that this new one will conflict with.

Pressing Email or SMS will let you create a message for dealing with this conflict with the Contact Person on this screen.

Booking Conflict
✕

Conflicts

Conflict # 1

Booking

1st,2nd,3rd,4th,5th Sunday of every Month  
 Time - 09:30 AM  
 Period - 2:30 HR  
 Finish Time - 12:00 PM

Booking Type

Pattern Booking Type 1

---

Rooms

Church Worship Auditorium  
 Vestry  
 Meeting Room  
 Sunday School Room 1

Event

Morning Church Service

Administrator

Chapman Ruth

Booking Created

Sunday, 3 January 2016

Contact Surname

Smith

Contact Name

Brian

Contact Phone

54678983

Contact Mobile

04563345566

Contact Email

brian@gmail.com

Alert Reminder

Days before Booking Date

Exclusion Dates

Kitchen has been booked so that an afternoon tea can be served after church

Help

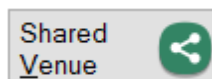
Email

SMS

View All

Close

## Shared Venue



This powerful feature lets you see what room bookings are shared within the venue at or around the same time. This allows you to see at a glance what else is on in the venue at the same time you want to create a booking for another area of the venue. Use the SMS and Email buttons to communicate with the Contact Person shown on this form.

Shared Venue Bookings
✕

Same Day Bookings

Same Time Bookings

Shared Booking #1

Shared Booking #2

Booking

1st,2nd,3rd,4th,5th Sunday of every Month  
 Time - 09:30 AM  
 Period - 2:30 HR  
 Finish Time - 12:00 PM

Booking Type

Pattern 1 Booking

---

Rooms

Vestry  
Meeting Room  
Sunday School Room 1

Event

Administrator

Booking Created

Contact Surname

Contact Name

Contact Phone

Contact Mobile

Contact Email

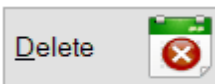
Alert Reminder  Days before Booking Date

Exclusion Dates

Kitchen has been booked so that an afternoon tea can be served after church

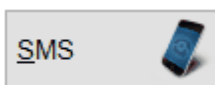
Help ?
Email
SMS
View All
Close

**Delete**



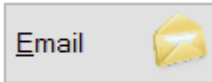
Press this when available (viewing an existing booking record) to delete that booking. BOOKING deletions cannot be undone.

**SMS**



Press the SMS button to compose and send an SMS message to the Contact person for the currently displayed booking.

## Email



Press the Email button to compose and send an Email message to the Contact person for the currently displayed booking.

## Venue (Calendar View)

The Venue View is a month at a time view of all bookings for the selected venue.



Click on each of the icons below for more information on each area.

Venue Booking Monthly Display

Close Filters New Book Availability Help

Venue: Main Street Baptist Church

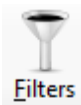
Calendar Month: December 2015

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1 1 Booking Start 08:00pm Finish 10:00pm	2	3	4 1 Booking Start 10:00am Finish 01:00pm	5 1 Booking Start 07:00pm Finish 10:00pm
6 2 Bookings Start 09:30am Finish 09:00pm	7 1 Booking Start 07:00pm Finish 09:30pm	8 1 Booking Start 08:00pm Finish 10:00pm	9	10	11 1 Booking Start 10:00am Finish 01:00pm	12 1 Booking Start 07:00pm Finish 10:00pm
13 2 Bookings Start 09:30am Finish 09:00pm	14	15 1 Booking Start 08:00pm Finish 10:00pm	16	17 1 Booking Start 09:00am Finish 11:00am	18 1 Booking Start 10:00am Finish 01:00pm	19 1 Booking Start 07:00pm Finish 10:00pm
20 2 Bookings Start 09:30am Finish 09:00pm	21 1 Booking Start 07:00pm Finish 09:30pm	22 2 Bookings Start 09:00am Finish 10:00pm	23 (Today) 1 Booking Start 07:00pm Finish 10:00pm	24	25 1 Booking Start 10:00am Finish 01:00pm	26 1 Booking Start 07:00pm Finish 10:00pm
27 2 Bookings Start 09:30am Finish 09:00pm	28	29 1 Booking Start 08:00pm Finish 10:00pm	30	31		

Double Click on days with Bookings to View / Edit the Booking

Show Monthly Display on Pastoral Care Startup

## Filters



Press the Filters button to let you filter the calendar with the standard Booking [Filters](#).

**New Book**



**New Book** Press the New Book button to create a new room booking. See [New Booking](#) for more details.

**Availability**



Use the Availability to check if there are any conflicts before you create a booking.

To Check for an availability, simply select the date or pattern for your booking, select the Time and Period and the Rooms needed, then press **Check Availability** at the bottom of the window.

**Check Booking Availability** X

Venue

Time   Period   Finish Time:

By Date    To

By Pattern 1   1st  2nd  3rd  4th  5th  of Every Month

By Pattern 2  Every   Start

on   Finish

Rooms  Church Worship Auditorium   Vestry  Meeting Room  Sunday School Room 1  Sunday School Room 2  Kitchen

**Select Venue**

Venue

Select the venue to display on the month view grid.

**Select Month**

Calendar Month

Use the arrow buttons to scroll to different months, or use the date picker to select another month to show in the grid.

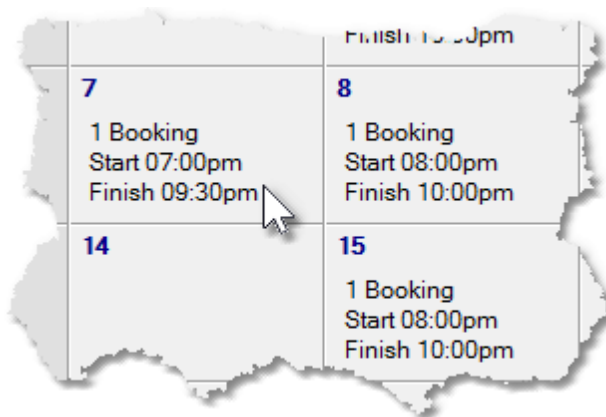
## Display on Startup

Show Monthly Display on Pastoral Care Startup

Tick this option to have the Calendar Month View shown each time Pastoral Care starts up.

## Month Grid

This grid shows the number of bookings on each day for the selected Venue and Month. Double clicking on a cell will show you more booking information if one exists, or open up an add booking form for creating a booking.



	7	8
	1 Booking Start 07:00pm Finish 09:30pm	1 Booking Start 08:00pm Finish 10:00pm
	14	15 1 Booking Start 08:00pm Finish 10:00pm

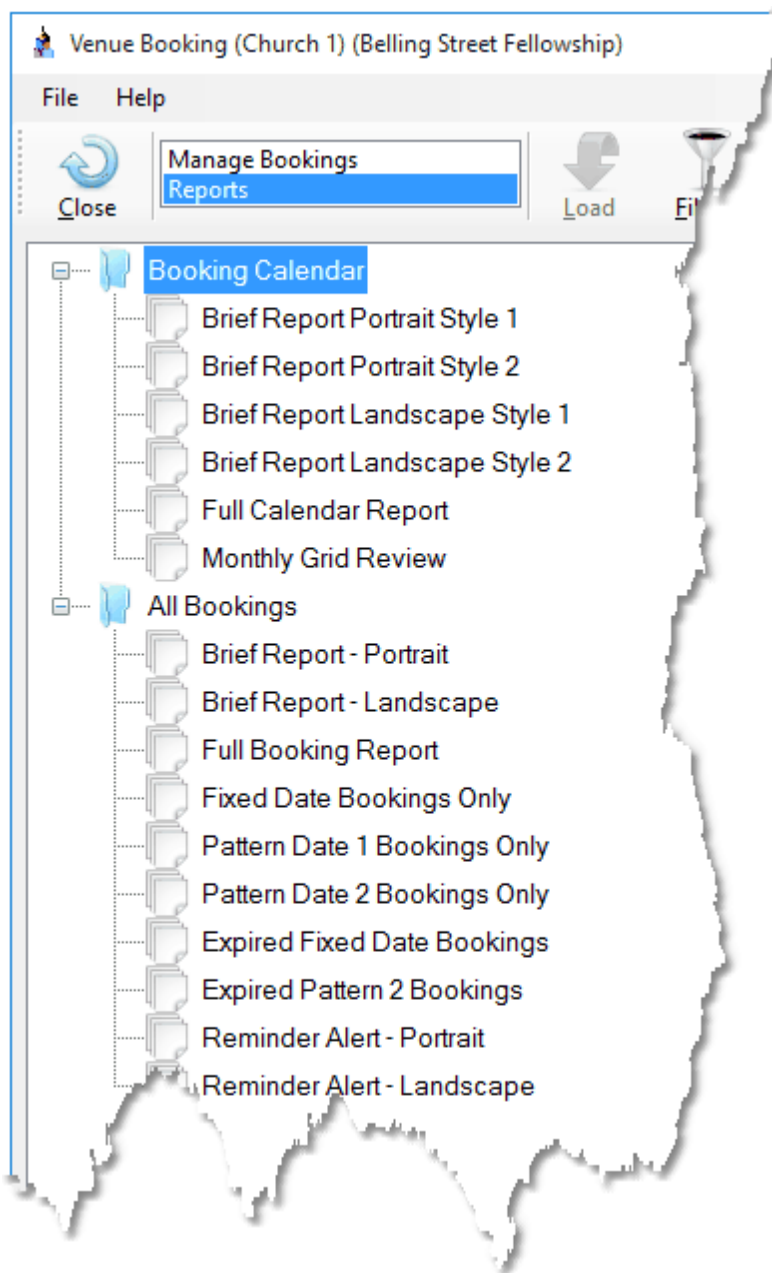
## Reports

The Reports area for the Venue Booking area is accessed by pressing reports in the list on the top left of the toolbar.



Click on each area on the sample window below for more information.





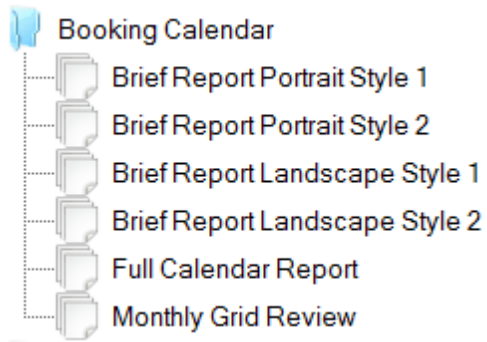
## Booking Calendar

Each of the Booking Calendar Reports all have a common Pre-Flight window that lets you control what is displayed on the report.

See the [Booking Calendar Pre-Flight](#) window for full details on the options available for each of the following reports.



Click on each report name for a sample of each report.



### Booking Calendar Pre-Flight

The Booking Calendar Pre-Flight window is displayed prior to a Booking Calendar report being displayed. This window allows you to filter and sort the report before it is produced.



Click on each area on the window below for more information.

**Venue**

Select a Venue to report on.

**Rooms**

Select the rooms to report on. By Default, all rooms are selected.

**Date Range**

Select a date range to report on. The Date used by this filter is the Venue Booking Date.

### Event Filter

Event  Partial Match  Full Match

Select **Partial Match** and enter part of an event description to locate an event. Using **Full Match** must be an exact match for what you have typed in. Leave this field blank if you want all data reported on.

### Administrator

Administrator

Select an administrator to filter on. If you leave this field empty, then there will be no administrator filter applied. An Administrator is usually the person making the booking in Pastoral Care.

### Contact Surname

Enter a Contact Surname to search on - or Press the People Button to search for people without having to enter their name.

Contact Surname 

### Contact Name

Enter a contact name to search for.

Contact Name

### Sorting

Sort Dates  
 Ascending  Descending

Set the report to be sorted on the Booking Date in either Ascending or Descending order.

### Only Display Bookings with Alert

Only display bookings with Alert Reminder

Tick this option to filter the report only show those bookings that have an Alert Reminder set.

**Brief Report Portrait Style 1****Calendar Brief Report 1**

Venue: Main Street Baptist Church (Sunday, 27 December 2015 to Saturday, 2 January 2016)

Date	Start	Finish	Room	Event
27/12/2015 (Sun)	07:00 PM	09:00 PM	Kitchen	Home Group Cooking Evening
27/12/2015 (Sun)	09:30 AM	12:00 PM	Church Worship Auditorium Vestry Meeting Room Sunday School Room 1 Sunday School Room 2 Kitchen	Morning Church Service
27/12/2015 (Sun)	07:00 PM	09:00 PM	Church Worship Auditorium Vestry Kitchen	Evening Church Service
29/12/2015 (Tue)	08:00 PM	10:00 PM	Sunday School Room 1	Toms Bible Study Group
01/01/2016 (Fri)	10:00 AM	01:00 PM	Meeting Room Kitchen	Ladies Bible Study
02/01/2016 (Sat)	07:00 PM	10:00 PM	Church Worship Auditorium Kitchen	Youth Group

**Brief Report Portrait Style 2****Calendar Brief Report 2**

Venue: Main Street Baptist Church (Sunday, 27 December 2015 to Saturday, 2 January 2016)

**27 December 2015 (Sunday)**

07:00 PM To 09:00 PM	Kitchen	Home Group Cooking Evening
09:30 AM To 12:00 PM	Church Worship Auditorium Vestry Meeting Room Sunday School Room 1 Sunday School Room 2 Kitchen	Morning Church Service
07:00 PM To 09:00 PM	Church Worship Auditorium Vestry Kitchen	Evening Church Service

**29 December 2015 (Tuesday)**

08:00 PM To 10:00 PM	Sunday School Room 1	Toms Bible Study Group
----------------------	----------------------	------------------------

**1 January 2016 (Friday)**

10:00 AM To 01:00 PM	Meeting Room	Ladies Bible Study
----------------------	--------------	--------------------

## Brief Report Landscape Style 1

Calendar Brief Report						
Venue: Main Street Baptist Church (Sunday, 27 December 2015 to Saturday, 2 January 2016)						
Date	Start	Finish	Room	Event	Contact Person	Type
27/12/2015 (Sun)	07:00 PM	09:00 PM	Kitchen	Home Group Cooking Evening	Ruby Dobber	Fixed
27/12/2015 (Sun)	09:30 AM	12:00 PM	Church Worship Auditorium Vestry Meeting Room Sunday School Room 1 Sunday School Room 2 Kitchen	Morning Church Service	Brian Smith	Pattern 1
27/12/2015 (Sun)	07:00 PM	09:00 PM	Church Worship Auditorium Vestry Kitchen	Evening Church Service	Peter Blackmore	Pattern 1
29/12/2015 (Tue)	08:00 PM	10:00 PM	Sunday School Room 1	Toms Bible Study Group	Tom Clean	Pattern 1
01/01/2016 (Fri)	10:00 AM	01:00 PM	Meeting Room Kitchen	Ladies Bible Study	Grace King	Pattern 1
02/01/2016 (Sat)	07:00 PM	10:00 PM	Church Worship Auditorium Vestry Kitchen	Youth Group	Alister Davies	Pattern 1

## Brief Report Landscape Style 2

Calendar Brief Report						
Venue: Main Street Baptist Church (Sunday, 27 December 2015 to Saturday, 2 January 2016)						
<b>27 December 2015 (Sunday)</b>						
	07:00 PM To 09:00 PM		Kitchen	Home Group Cooking Evening	Ruby Dobber	Fixed
	09:30 AM To 12:00 PM		Church Worship Auditorium Vestry Meeting Room Sunday School Room 1 Sunday School Room 2 Kitchen	Morning Church Service	Brian Smith	Pattern 1
	07:00 PM To 09:00 PM		Church Worship Auditorium Vestry Kitchen	Evening Church Service	Peter Blackmore	Pattern 1
<b>29 December 2015 (Tuesday)</b>						
	08:00 PM To 10:00 PM		Sunday School Room 1	Toms Bible Study Group	Tom Clean	Pattern 1
<b>1 January 2016 (Friday)</b>						
	10:00 AM To 01:00 PM		Meeting Room Kitchen	Ladies Bible Study	Grace King	Pattern 1
<b>2 January 2016 (Saturday)</b>						

## Full Calendar Report

## Calendar Full Report

Venue: Main Street Baptist Church (Sunday, 27 December 2015 to Saturday, 2 January 2016)

<b>Date:</b> 27/12/2015	<b>Start:</b> 07:00 PM	<b>Finish:</b> 09:00 PM	<b>Event:</b> Home Group Cooking Evening
<b>Day:</b> Sunday		<b>Type:</b> Fixed	<b>Created:</b> 26/12/2015
<b>Room:</b> Kitchen		<b>Administrator:</b> Brown Peter	
<b>Contact:</b> Ruby Dobber			
<b>Mobile:</b> 041234567890			
<b>Email:</b> hugo@spirit.com.au			
<b>Date:</b> 27/12/2015	<b>Start:</b> 09:30 AM	<b>Finish:</b> 12:00 PM	<b>Event:</b> Morning Church Service
<b>Day:</b> Sunday		<b>Type:</b> Pattern 1	<b>Created:</b> 03/01/2016
<b>Room:</b> Church Worship Auditorium Vestry Meeting Room Sunday School Room 1 Sunday School Room 2 Kitchen		<b>Administrator:</b> Chapman Ruth	
<b>Contact:</b> Brian Smith			
<b>Phone:</b> 54678983			
<b>Mobile:</b> 04563345566			
<b>Email:</b> brian@gmail.com			
<b>Notes:</b> Kitchen has been booked so that an afternoon tea can be served after church			
<b>Date:</b> 27/12/2015	<b>Start:</b> 07:00 PM	<b>Finish:</b> 09:00 PM	<b>Event:</b> Evening Church Service
<b>Day:</b> Sunday		<b>Type:</b> Pattern 1	<b>Created:</b> 06/01/2016
<b>Room:</b> Church Worship Auditorium		<b>Administrator:</b> Brown Peter	

## Monthly Grid Review

The Monthly Grid report has its own Pre-Flight Options.

Venue Booking Calendar						
Main Street Baptist Church December 2015						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		<b>1</b> 1 Booking Start 08:00pm Finish 10:00pm	<b>2</b>	<b>3</b>	<b>4</b> 1 Booking Start 10:00am Finish 01:00pm	<b>5</b> 1 Booking Start 07:00pm Finish 10:00pm
<b>6</b> 2 Bookings Start 09:30am Finish 09:00pm	<b>7</b> 1 Booking Start 07:00pm Finish 09:30pm	<b>8</b> 1 Booking Start 08:00pm Finish 10:00pm	<b>9</b>	<b>10</b>	<b>11</b> 1 Booking Start 10:00am Finish 01:00pm	<b>12</b> 1 Booking Start 07:00pm Finish 10:00pm
<b>13</b> 2 Bookings Start 09:30am Finish 09:00pm	<b>14</b>	<b>15</b> 1 Booking Start 08:00pm Finish 10:00pm	<b>16</b>	<b>17</b> 1 Booking Start 09:00am Finish 11:00am	<b>18</b> 1 Booking Start 10:00am Finish 01:00pm	<b>19</b> 1 Booking Start 07:00pm Finish 10:00pm
<b>20</b> 2 Bookings Start 09:30am Finish 09:00pm	<b>21</b> 1 Booking Start 07:00pm Finish 09:30pm	<b>22</b> 2 Bookings Start 09:00am Finish 10:00pm	<b>23</b> 1 Booking Start 07:00pm Finish 10:00pm	<b>24</b>	<b>25</b> 1 Booking Start 10:00am Finish 01:00pm	<b>26</b> 2 Bookings Start 06:00pm Finish 10:00pm

## Monthly Grid Pre-Flight Options

The Monthly Grid Review report Pre-Flight window is displayed prior to the report being displayed. This window allows you to filter and sort the report before it is produced.



Click on each area on the window below for more information.



**Venue**

Select a Venue to report on.

**Rooms**

Select the rooms to report on. By Default, all rooms are selected.

**Select Month**

Select a month to report on. The Date Month used by this filter is the Venue Booking Date.

**Event Filter**

Select **Partial Match** and enter part of an event description to locate an event. Using **Full Match** must be an exact match for what you have typed in.

Leave this field blank if you want all data reported on.

### Contact Surname

Enter a Contact Surname to search on - or Press the People Button to search for people without having to enter their name.

Contact Surname 

Barker

### Contact Name

Enter a contact name to search for.

Contact Name

### Booking Type

Tick the booking types you want to include on the report

Booking Type

Fixed  Pattern 1  Pattern 2

### Administrator

Administrator

Select an administrator to filter on. If you leave this field empty, then there will be no administrator filter applied. An Administrator is usually the person making the booking in Pastoral Care.

### Sorting

Sort Dates

Ascending  Descending

Set the report to be sorted on the Booking Date in either Ascending or Descending order.

### Only Display Bookings with Alert

Only display bookings with Alert Reminder

Tick this option to filter the report only show those bookings that have an Alert Reminder set.

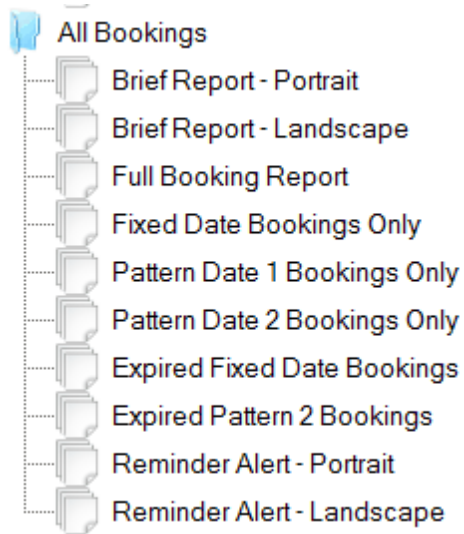
### All Bookings

Each of the All Bookings Reports all have a common Pre-Flight window that lets you control what is displayed on the report.

See the [All Bookings Pre-Flight](#) window for full details on the options available for each of the following reports.



Click on each report name for a sample of each report.



### All Bookings Pre-Flight

The All Bookings Pre-Flight window is displayed prior to an All Bookings report being displayed. This window allows you to filter and sort the report before it is produced.



Click on each area on the window below for more information.

**Venue Booking Report Setup**

**Venue**  
 Main Street Baptist Church

**Rooms**

- Church Worship Auditorium
- Vestry
- Meeting Room
- Sunday School Room 1
- Sunday School Room 2
- Kitchen

**Event**  Partial Match  Full Match

Administrator

Contact Surname

Contact Name

**Sort Dates**

Ascending  Desending

Only display bookings with Alert Reminder

Help ? Cancel Continue

### Venue

Venue  
Main Street Baptist Church

Select a Venue to report on.

### Rooms

Rooms

- Church Worship Auditorium
- Vestry
- Meeting Room
- Sunday School Room 1
- Sunday School Room 2
- Kitchen

Select the rooms to report on. By Default, all rooms are selected.

### Event Filter

Event  Partial Match  Full Match

Select Partial Match and enter part of an event description to locate an event.

Using Full Match must be an exact match for what you have typed in.

Leave this field blank if you want all data reported on.

**Administrator**

Administrator

Select an administrator to filter on. If you leave this field empty, then there will be no administrator filter applied. An Administrator is usually the person making the booking in Pastoral Care.

**Contact Surname**

Enter a Contact Surname to search on - or Press the People Button to search for people without having to enter their name.

Contact Surname  

**Contact Name**

Enter a contact name to search for.

Contact Name

**Sorting**

Sort Dates  
 Ascending  Descending

Set the report to be sorted on the Booking Date in either Ascending or Descending order.

**Only Display Bookings with Alert**

Only display bookings with Alert Reminder

Tick this option to filter the report only show those bookings that have an Alert Reminder set.

**Brief Report Portrait**

All Booking Brief Report				
Venue: Main Street Baptist Church				
Created	Booking	Start	Finish	Room
19/12/2015	Tuesday, 22 December 2015	09:00 AM	11:00 AM	Church Worship Auditorium
25/12/2015	Saturday, 26 December 2015	06:00 PM	08:00 PM	Kitchen
26/12/2015	Sunday, 27 December 2015	07:00 PM	09:00 PM	Kitchen
03/01/2016	1st,2nd,3rd,4th,5th Sunday of every Month	09:30 AM	12:00 PM	Church Worship Auditorium Vestry Meeting Room Sunday School Room 1 Sunday School Room 2 Kitchen
06/01/2016	1st,2nd,3rd,4th,5th Sunday of every Month	07:00 PM	09:00 PM	Church Worship Auditorium Vestry Kitchen
11/01/2016	1st,2nd,3rd,4th,5th Saturday of every Month	07:00 PM	10:00 PM	Church Worship Auditorium Kitchen
12/01/2016	1st,2nd,3rd,4th,5th Friday of every Month	10:00 AM	01:00 PM	Meeting Room

## Brief Report Landscape

All Booking Brief Report						
Venue: Main Street Baptist Church						
Created	Booking	Start	Finish	Room	Event	Contact Person
19/12/2015	Tuesday, 22 December 2015	09:00 AM	11:00 AM	Church Worship Auditorium	One Off booking for special meeting	Jordan Farrington
25/12/2015	Saturday, 26 December 2015	06:00 PM	08:00 PM	Kitchen	Boxing Day Food Prep	Edith Eadon
26/12/2015	Sunday, 27 December 2015	07:00 PM	09:00 PM	Kitchen	Home Group Cooking Evening	Ruby Dobber
03/01/2016	1st,2nd,3rd,4th,5th Sunday of every Month	09:30 AM	12:00 PM	Church Worship Auditorium Vestry Meeting Room Sunday School Room 1 Sunday School Room 2 Kitchen	Morning Church Service	Brian Smith
06/01/2016	1st,2nd,3rd,4th,5th Sunday of every Month	07:00 PM	09:00 PM	Church Worship Auditorium Vestry Kitchen	Evening Church Service	Peter Blackmore
11/01/2016	1st,2nd,3rd,4th,5th Saturday of every Month	07:00 PM	10:00 PM	Church Worship Auditorium Kitchen	Youth Group	Alister Davies
12/01/2016	1st,2nd,3rd,4th,5th Friday of every Month	10:00 AM	01:00 PM	Meeting Room Kitchen	Ladies Bible Study	Grace King
13/01/2016	4th Wednesday of every Month	07:00 PM	10:00 PM	Meeting Room	Leadership Meeting	Don Anderson
16/01/2016	1st,3rd Monday of every Month	07:00 PM	09:30 PM	Meeting Room	Bible Study - Male Group	Mak Billing
16/01/2016	3rd Thursday of every Month	09:00 AM	11:00 AM	Vestry	Pastoral Care Meeting	Ben Baker
17/01/2016	1st,3rd,5th Sunday of every Month	09:00 AM	11:00 AM	Meeting Room	Study group	Peter Miller

## Full Booking Report

All Booking Full Report			
Venue: Main Street Baptist Church			
<b>Booking:</b> Tuesday, 22 December 2015	<b>Start:</b> 09:00 AM	<b>Finish:</b> 11:00 AM	
<b>Room:</b> Church Worship Auditorium	<b>Type:</b> Fixed	<b>Event:</b> One Off booking for special meeting	
<b>Contact:</b> Jordan Farrington		<b>Created:</b> 19/12/2015	
<b>Phone:</b> 0400-000-000		<b>Administrator:</b> Allwright Marion	
		<b>Alert Reminder:</b> 2	
<b>Booking:</b> Saturday, 26 December 2015	<b>Start:</b> 06:00 PM	<b>Finish:</b> 08:00 PM	
<b>Room:</b> Kitchen	<b>Type:</b> Fixed	<b>Event:</b> Boxing Day Food Prep	
<b>Contact:</b> Edith Eadon		<b>Created:</b> 25/12/2015	
<b>Mobile:</b> 041234567890		<b>Administrator:</b> Angel Belinda	
<b>Email:</b> jack@spirit.com.au			
<b>Booking:</b> Sunday, 27 December 2015	<b>Start:</b> 07:00 PM	<b>Finish:</b> 09:00 PM	
<b>Room:</b> Kitchen	<b>Type:</b> Fixed	<b>Event:</b> Home Group Cooking Evening	
<b>Contact:</b> Ruby Dobber		<b>Created:</b> 26/12/2015	
<b>Mobile:</b> 041234567890		<b>Administrator:</b> Brown Peter	

## Fixed Date Bookings Only

## Fixed Booking Report

Venue: Main Street Baptist Church

<b>Booking:</b> Tuesday, 22 December 2015	<b>Start:</b> 09:00 AM	<b>Finish:</b> 11:00 AM
<b>Room:</b> Church Worship Auditorium	<b>Type:</b> Fixed	<b>Event:</b> One Off booking for special meeting
<b>Contact:</b> Jordan Farrington		<b>Created:</b> 19/12/2015
<b>Phone:</b> 0400-000-000		<b>Administrator:</b> Allwright Marion
		<b>Alert Reminder:</b> 2

<b>Booking:</b> Saturday, 26 December 2015	<b>Start:</b> 06:00 PM	<b>Finish:</b> 08:00 PM
<b>Room:</b> Kitchen	<b>Type:</b> Fixed	<b>Event:</b> Boxing Day Food Prep
<b>Contact:</b> Edith Eadon		<b>Created:</b> 25/12/2015
		<b>Administrator:</b> Angel Belinda

<b>Mobile:</b> 041234567890		
<b>Email:</b> jack@spirit.com.au		
<b>Booking:</b> Sunday, 27 December 2015	<b>Start:</b> 07:00 PM	<b>Finish:</b> 09:00 PM
<b>Room:</b> Kitchen	<b>Type:</b> Fixed	<b>Event:</b> Home Group Cooking Evening
<b>Contact:</b> Ruby Dobber		<b>Created:</b> 26/12/2015
		<b>Administrator:</b> Brown Peter

<b>Mobile:</b> 041234567890
-----------------------------

## Pattern Date 1 Bookings Only

## Pattern 1 Booking Report

Venue: Main Street Baptist Church

<b>Booking:</b> 1st,2nd,3rd,4th,5th Sunday of every Month	<b>Start:</b> 09:30 AM	<b>Finish:</b> 12:00 PM
<b>Room:</b> Church Worship Auditorium Vestry Meeting Room Sunday School Room 1 Sunday School Room 2 Kitchen	<b>Type:</b> Pattern 1	<b>Event:</b> Morning Church Service
<b>Contact:</b> Brian Smith		<b>Created:</b> 03/01/2016
<b>Phone:</b> 54678983		<b>Administrator:</b> Chapman Ruth
<b>Mobile:</b> 04563345566		
<b>Email:</b> brian@gmail.com		
<b>Notes:</b> Kitchen has been booked so that an afternoon tea can be served after church		

<b>Booking:</b> 1st,2nd,3rd,4th,5th Sunday of every Month	<b>Start:</b> 07:00 PM	<b>Finish:</b> 09:00 PM
<b>Room:</b> Church Worship Auditorium Vestry Kitchen	<b>Type:</b> Pattern 1	<b>Event:</b> Evening Church Service
<b>Contact:</b> Peter Blackmore		<b>Created:</b> 06/01/2016
<b>Phone:</b> 545834236		<b>Administrator:</b> Brown Peter
<b>Mobile:</b> 0400083423		
<b>Email:</b> peter@gmail.com		

<b>Notes:</b> Youth running the evening service with a rotation of qu...
--

### Pattern Date 2 Bookings Only

#### Pattern 2 Booking Report

Venue: Main Street Baptist Church

<b>Booking:</b> Every Week on Tuesday From 05/01/2016 to 27/03/2016	<b>Start:</b> 09:00 AM	<b>Finish:</b> 11:00 AM
<b>Room:</b> Meeting Room	<b>Type:</b> Pattern 2	<b>Event:</b> Peters Hills Bible Study group
<b>Contact:</b> Peter Hill		<b>Created:</b> 17/01/2016
<b>Phone:</b> 586456322		<b>Administrator:</b> Angel Belinda
<b>Mobile:</b> 040453224545		
<b>Email:</b> hill@gmail.com.au		
<b>Notes:</b> This is a special bible study taking people through Genesis		
<b>Booking:</b> Every Week on Thursday From 04/06/2015 to 14/08/2015	<b>Start:</b> 10:00 AM	<b>Finish:</b> 12:00 PM
<b>Room:</b> Meeting Room	<b>Type:</b> Pattern 2	<b>Event:</b> Donna Giles Bible Study group
<b>Contact:</b> Donna Giles		<b>Created:</b> 17/01/2016
<b>Phone:</b> 567333454		<b>Administrator:</b> Chapman Ruth
<b>Mobile:</b> 0434555633		
<b>Email:</b> donna@gmail.com		
<b>Notes:</b> A special bible study for new christian ladies of the church		

### Expired Fixed Date Bookings

#### Expired Fixed Bookings Report

Venue: Main Street Baptist Church

<b>Booking:</b> Tuesday, 22 December 2015	<b>Start:</b> 09:00 AM	<b>Finish:</b> 11:00 AM
<b>Room:</b> Church Worship Auditorium	<b>Type:</b> Fixed	<b>Event:</b> One Off booking for special meeting
<b>Contact:</b> Jordan Farrington		<b>Created:</b> 19/12/2015
<b>Phone:</b> 0400-000-000		<b>Administrator:</b> Allwright Marion
		<b>Alert Reminder:</b> 2
<b>Booking:</b> Saturday, 26 December 2015	<b>Start:</b> 06:00 PM	<b>Finish:</b> 08:00 PM
<b>Room:</b> Kitchen	<b>Type:</b> Fixed	<b>Event:</b> Boxing Day Food Prep
<b>Contact:</b> Edith Eadon		<b>Created:</b> 25/12/2015
		<b>Administrator:</b> Angel Belinda
<b>Mobile:</b> 041234567890		
<b>Email:</b> jack@spirit.com.au		



**Expired Pattern 2 Bookings**

**Pattern 2 Expired Bookings**  
 Venue: Main Street Baptist Church

---

**Booking:** Every Week on Thursday  
 From 04/06/2015 to 14/08/2015

**Start:** 10:00 AM    **Finish:** 12:00 PM

**Room:** Meeting Room    **Type:** Pattern 2    **Event:** Donna Giles Bible Study group

**Contact:** Donna Giles    **Created:** 17/01/2016

**Phone:** 567333454    **Administrator:** Chapman Ruth

**Mobile:** 0434555633

**Email:** donna@gmail.com

**Notes:** A special bible study for new christian ladies of the church

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**Reminder Alert Portrait**

**Alert Reminder Report**  
 Venue: Main Street Baptist Church

---

Reminder	Booking	Start	Finish	Room
2 days	Tuesday, 22 December 2015	09:00 AM	11:00 AM	Church Worship Auditorium

---

**Reminder Alert Landscape**

**All Booking Brief Report**  
 Venue: Main Street Baptist Church

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Created	Booking	Start	Finish	Room	Event	Contact Person
19/12/2015	Tuesday, 22 December 2015	09:00 AM	11:00 AM	Church Worship Auditorium	One Off booking for special meeting	Jordan Farrington

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## Class Room Manager



The Pastoral Care Classroom Manager is an extremely powerful system for checking people in and out of classes, Managing Teachers and Students, Managing Classrooms and more!

This feature is designed primarily for controlling the flow of children between their parents / guardians, and their classroom teachers for Sunday School and other such meetings.

As with any powerful fully featured program, a church needs to decide if the amount of work involved is justified, or if there are easier ways of managing risk to children in your care than using a fully fledged management system. Classroom Manager is flexible enough to be used in a number of different scenarios from totally controlling the drop off and pick up processes, to just assisting with these processes. The choice on how to best utilize this feature will be yours.

There are 3 different security modes for checking if a person is authorized to collect a child. Click on each of these below for more information on each method.

[Pin Number](#)

[Photo Id](#)

[Barcode Scanning](#)

If you are not sure if this feature is for you, have a read of: [Should we use the Classroom Manager](#)

Please see [How to use the Classroom Manager](#) for more information on how to use this feature.

### From Simple to Comprehensive

The Classroom Manager is designed to run at differing levels of use, and this is it assist you in utilizing this feature to the level of complexity required.

#### Simplest Level

Use the program as a solution to *only manage your classes*. This allows you do define just the Classrooms and Students. No teachers are assigned here, however you can create classrooms, and assign students to those classrooms, including visitors. In its simplest use, this does not involve the recording of drop off and pickups. If you intend to record drop off and pickups, you will need to use all features of the classroom manager, the highest level of complexity.

#### Moderate Level

This level of use add Teachers to the mix, and allows you to assign Teachers to each class. This is still not recording of drop off and pickups

#### Advanced Level

This level adds the use of Pickups. A Pickup is simply a relationship that has been agreed on between

an adult and a student where the adult is authorized to pickup a student. An adult can be authorized to pickup any number of students. This feature is supported with reports that can be used by church staff to manage the pickup of students. This is still not actually recording of the check in and check out process, but is only one step away from that.

### **Comprehensive Level**

This level uses every feature above to completely control the process of who is allowed into which classrooms with whom, and who has dropped a person off to a class, and who is authorized to pick them up, and who they were checked out to at the end of a class.

## **The Gate Keeper**

The Classroom Manager when used to its fullest capacity manages the process of accepting a child / student into your care for a classroom / teaching time, and then the process of leaving your care and being returned to the person authorised to accept that student back from your care.

To manage this process accurately and safely for all people, your check in staff MUST be able to be exposed to confidential information about each student and each authorised pickup person. We have the ability to record such things as Medical Issues, and Safety Alerts, such as Family Violence Orders, Custody Rulings etc. This means that the staff INVOLVED in check in and check out, will be privy to that information. Please train these staff appropriately for privacy standards.

## **Should we use the Classroom Manager**

### **Introduction**

Controlling the access that Adults have to Children is an important function of Child Safe legislation. Already, your church should be familiar with the Child Safe laws in your state or local area. Sometimes these are governed by local laws, in other cases they may be governed on a district or even country wide basis.

There is generally 2 different streams of controls in place to help protect children in our care. Are our teachers Safe People (ie Deemed safe via Child Safe Legislation and associated requirements), and are we handling children in the best possible way. (Contact Policies, Check In, Check Out procedures etc)

### **Pastoral Care Child Safe**

Pastoral Care Child Safe will assist you greatly in recording all the information you need for reporting on your legislative requirements.

See [Child Safe](#) for information on records required for Legislative Child Safe requirements.

### **Classroom Manager**

The Classroom Manager offers a software solution for managing the process of checking people into an event, and checking them out. This is primarily meant for the management of drop off and pick up of children. All that is needed for this to function smoothly is a Windows based Laptop with rear facing Web Cam or a separate Web Cam, and possibly a USB or wireless connected Number Pad. However, this can also be run more simply, and you will find that the Classroom Manager will scale nicely from the smallest church to the largest church, all with various needs and requirements.

The overall concept here is that you setup known classrooms / groups and teachers that your students will be attending, and you have one or more check in points that the students need to pass through to enter, and leave the classroom area.

## Size of your student body

If you are a small church with around 20 children, and most people are known to the teachers or staff managing the events, then use of the Classroom Manager may be a bit too much for the job. Your church board should discuss the risks associated with managing the flow of children, and seek advice on whether or not the church wishes to assume or take responsibility for this area of management or not.

If you have over 40 children coming to different classes, then the Classroom Manager is an ideal program to assist with this process.

## Staff Training

With the use of a software solution to control the flow of students, and potentially having staff interfacing with people they don't personally know, we highly recommend that your check in / check out staff are trained for this roll, and that an experienced staff member is assigned to "hover" over the checkout period so they could be available for conflicts or problematic checkouts when or if they occur.

Staff that are assigned for the check in / checkout desk job should be:

- Aware of strict confidentiality requirements
- Have a personable and cheerful manner
- Be confident in the processes to manage the Classroom Manager program
- Be trained in conflict resolution

## Feature Set

Please be aware that not all features need to be used in the Classroom Manager, however, the more relationships between these items are defined, the smoother and smarter the Classroom Manager can become.

With more properties set throughout the program, you will be creating a system that requires more management of the data held in the Classroom Manager so consider what features you want to use, and start small. Then increase the features if needed.

## How to use the Classroom Manager

The very first step, after you have decided if you are going to use the Classroom Manager, is to setup all the settings that control the Classroom Manager.

See [Classroom Manager Setup](#) for information on how to setup your Departments and Class Names. This **must** be done before doing any more configuration.

As there are several different levels of use, you may find it useful to just look through the various areas, check out the options available on the New and Manage and Sign In/Out toolbar buttons and get a feel for how this might work in your current situation, and whether or not you change how you are managing your children now.

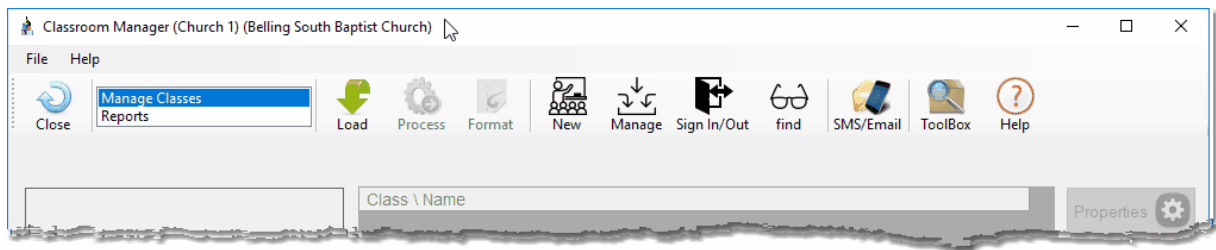
After you have setup your Departments and Classes, go to the main menu, select the Church Tab and double click on the Classroom Manager menu item.

The following screen is opened. (Note, this is shown without any Classroom Data loaded. (We are showing here just the top portion of the window)



Click on the various parts of the below of the Classroom Manager to learn more about each area / feature.

This view is shown with Manage Classes selected, this is the default view for all functions except reporting.



## New Items

Work your way through each of the New items on the toolbar. [Create a Student](#) [Create a Teacher](#)  
[Create a Pickup](#) [Student / Class / Pickup Link](#)

## Manage

Use the Manage toolbar item to make changes to the following areas

[Students](#)

[Pickups](#)

[Teachers](#)

[Pickup P.I.N](#)

[Pickup ID](#)

[Class Pickups](#)

[Class Student Participation](#)

[Delete Data](#)

See also [Classroom Manager Manage](#)

## Run a Sign in / Sign Out event

[See Classroom Manager Sign In / Sign Out](#) for information on that feature.

## Classroom Manager - Steps

Listed below is the main steps to configuration, data loading and use of the Classroom Manager. This is an overview with a single topic to allow you to click on each step and learn about those steps.

<b>Step 1</b>	Configure and setup	<a href="#">Classroom Manager Setup</a>
<b>Step 2</b>	Create Students	<a href="#">Create a Student</a>
<b>Step 3</b>	Create Teachers	<a href="#">Create a Teacher</a>
<b>Step 4</b>	Create Pickup Links	<a href="#">Student / Class / Pickup Link</a>
<b>Step 5</b>	Running an Event	<a href="#">Classroom Manager Sign In / Sign Out</a>

## Authentication Methods

### Authentication Methods

There are 3 different methods that can be used for a person to be identified as an authorised pick up person.

An Authorised or Authenticated pick up person is an individual who has permission to pick up and take with them another person (child)

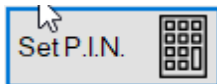
The three methods are [Pin Number](#), [Photo Id](#) and [Barcode Scanning](#)

### Pin Number

When using Pin Number mode, an authorized person is given a unique Pin Number to allow a child to be released to a person who can enter a PIN number correctly.


Use of a USB connected KEYPAD could be useful at the check in / check out desk to allow this to happen smoothly without having people calling out their pin number for you to enter.

### Entering a PIN NUMBER



Throughout the Classroom Manager, there are a number of places where you can set a PIN number for a pickup authorisation. The following screen is shown when this button (Shown Above) is pressed...

Pickup Persons P.I.N.



Request the Pickup Person to enter their P.I.N. Now.  
Once entered request them to press the Enter Key.

Help

Admin Level

Close

When this is displayed, have the Pickup Person enter a PIN NUMBER into a key pad, either on your keyboard, or better still, on a USB connected Keypad.  
Press the green Tick Icon to accept the PIN number, and you will be asked to enter the number again.

These must be unique, and Pastoral Care will tell you if that number has already been used.

### Admin Level

If you know the password set in the settings area, you can request ADMIN level which will show you the numbers being entered, otherwise the number entry will be private (preferred method is private).

## Photo Id

When using Photo ID, an authorized person has their photo taken by a web cam at the check in point for comparison at the pickup time. See ([Via Webcam](#))

This allows a person on the check in / check out desk to be able to compare a photo taken earlier with the face of the person asking to pick up a child.

This is ideal if your staff do not know everyone, and also ideal where this is a high probability of visitors checking in and checking out people from your programs.

## Barcode Scanning

When using the bar code scanning feature, you can use a Pastoral Care bar coded name tag as an authoritative check for picking up a person at a checkout point.

Check out the Settings area for [Name Tags](#)

Name Tags for people can be printed from the [Create Reports](#) area of Pastoral Care.

## Classroom Manager Toolbar

This toolbar sits at the top of the Classroom Manager main window. All functions for the use of this program feature can be accessed from these buttons.



Click on each of the toolbar items to learn more about each function



## Classroom Manager Load



Press the Load Button on the Classroom Manager main screen to load in all people *already associated* with the Classroom Manager.

If you have not completed the setup procedures for this area, then there will be no departments or people to load.

If you have no students to view from this load, press New on the toolbar and then select [Create a Student](#)

Pressing the Load button will show the following screen. From here you can select who you want to work with in the current session.

Select your department, and either load in all students for checking into or out of classes, or select a single or selected classes.

Important: This load from the main Classroom Manager is used to MANAGE students already registered into the Classroom Manager. This is not the pathway to recording attendance in a class.



Click on each area below to learn more about Loading people into the Classroom Manager

Filters

Department  
 All Departments

Load All Students in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ  
 Young Adults

Load Options  
 All Students in Class  
 All Students Not in any Class  
 All Student Visitors  
 Students with No Pickups

Filter Students with...  
 Medical  
 Custody Alert  
 Child Protection Order  
 Family Violence Alert  
 Missing a Portrait Image

Ordered By...  
 Class  Name

Student Visitor Added Date Filter  
 Enable Date Filtering  
 Saturday . 8 September 2018  
 To Saturday . 8 September 2018

Image Options  
 Load Image  
 Small  Medium  Large

Help ?  
 Cancel ↶  
 Load ↵

### Classroom Departments

When loading people in, first select a department, or tick the Load All Students in Classes to automatically select all classes in the selected Department.

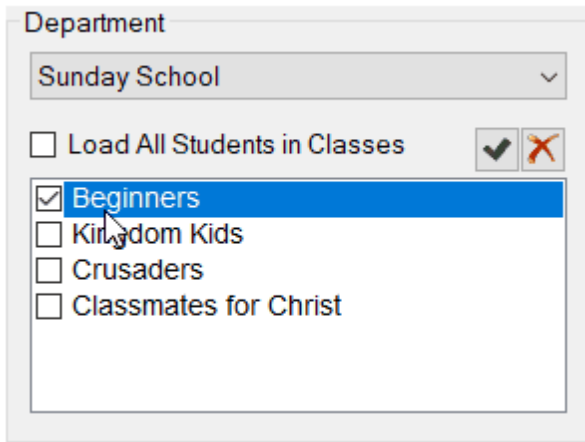
The structure for students and classes looks like this:

Department A	Class 1	List of Students
	Class 2	List of Students
Department B	Class 1	List of Students
	Class 2	List of Students

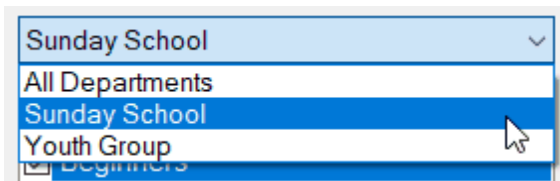


Click on each area below to learn more



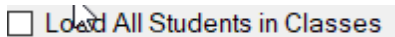


**Department Selection**



Select a Department to start your Classroom Selections from. Some churches may have only one department.

**Load All Students**



Tick this option to automatically include All Students in All Classes, instead of selecting only 1 or a number of classes.

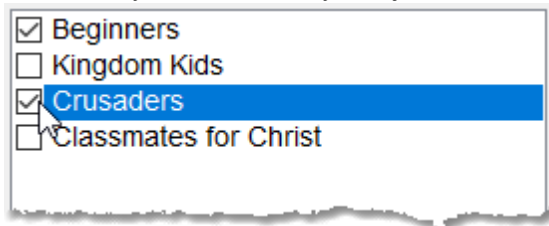
**Select / De-Select**



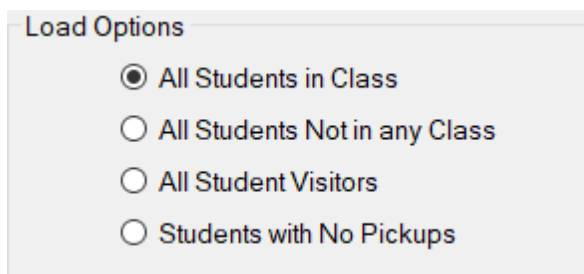
Tick for selecting ALL items in the Classroom List, Cross to de-select all Classrooms in the list.

**Manual Selection**

As shown, you can manually tick just a select range of classrooms in a Department.



**Classroom Load Options**



**All Students in Class**

Select this option to load all students in the classes ticked in the [Classroom Departments](#) section

### All Students Not in any Class

Select this option to load all students who are NOT in the classes ticked in the [Classroom Departments](#) section

### All Student Visitors

Select this option to load all students who are Visitors

### Students with No Pickups

Select this option to load all students who have no Pickup Data recorded

### Classroom Student Filters

Filter Students with...

- Medical
- Custody Alert
- Child Protection Order
- Family Violence Alert
- Missing a Portrait Image

To narrow your load of students to particular interests, tick the specific alert area to help better manage each of these areas.

### Ordered By

Ordered By

Class  Name

Order the loaded list by Class or by surname.

### Date Filter

Student Visitor Added Date Filter

Enable Date Filtering

Wednesday, 24 October 2018

To Wednesday, 24 October 2018

Enable and select a date range to find Student Visitors added on that date.

### Portrait Options

Portrait Options

Load Portraits

Small  Medium  Large

Tick this option to load in student portraits with each student.

## Classroom Manager Process



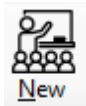
The Process button on the Classroom Manager toolbar is used only in the [Classroom Reports](#) section, and is used to generate a selected report. Click on [Classroom Reports](#) for a full description of that area.

## Classroom Manager Format



The Format button on the Classroom Manager toolbar is used only in the [Classroom Reports](#) section, and is used to format a selected report. Click on [Classroom Reports](#) for a full description of that area.

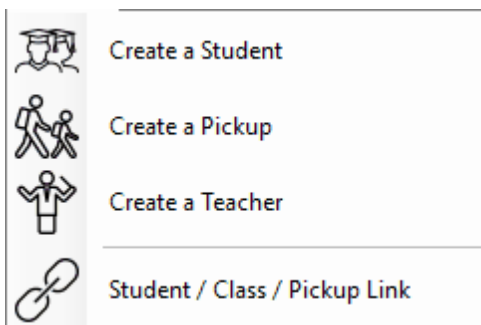
## Classroom Manager New



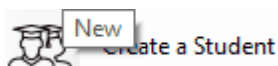
The New item on the [Classroom Manager Toolbar](#) has the following elements to select from.



Click on each item in the list below to learn more about each New item.



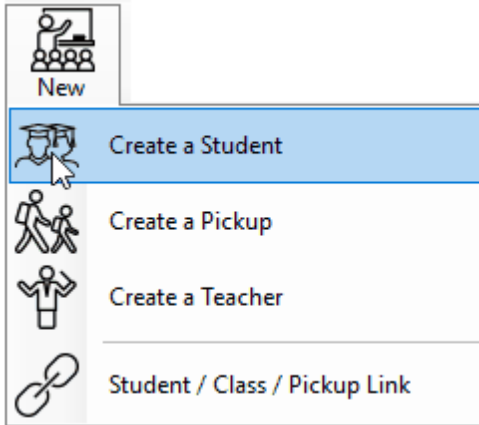
### Create a Student



A Student is an individual person already in your database who has been added to the Classroom Manager as a student. This allows Pastoral Care to know everything about the student in terms of contact information, related people and where they live etc.

### Visitors

During the sign in process, you can manually add Visitors to any of your classes. These people do not need to be entered into the main Pastoral Care database for them to be involved in a class.



When you press the Create a Student item from the New icon on the toolbar, the following form is opened.



Click on each item in the list below to learn more about each New item.

Create a New Student

### Step 1 - Choose the Student

Students   All Families   Visiting

All Students 🍷 ⚙️

- Allwright Mandy
- Allwright Thomas
- Angel Helen
- Angel Peter
- Anglin Kerryn
- Anglin Levi
- Anglin Mathew
- Barton Ernie
- Knight Michaela
- Knight Rachael

### Step 2 - Choose or Change Class

Add   View

Department ⚙️

Sunday School

- Beginners**
- Kingdom Kids
- Crusaders
- Classmates for Christ

Dont Exit after Creating Student

(v) = Visitor

Help ?
Create Student 
Close

### Choose the Student

To Choose a student, you can select from an Existing Student (to see what classes they are in, and possibly change that class if needed) or you can press All Families to select a person from your Pastoral Care database, or you can press Visiting to create a visitor.

#### Students

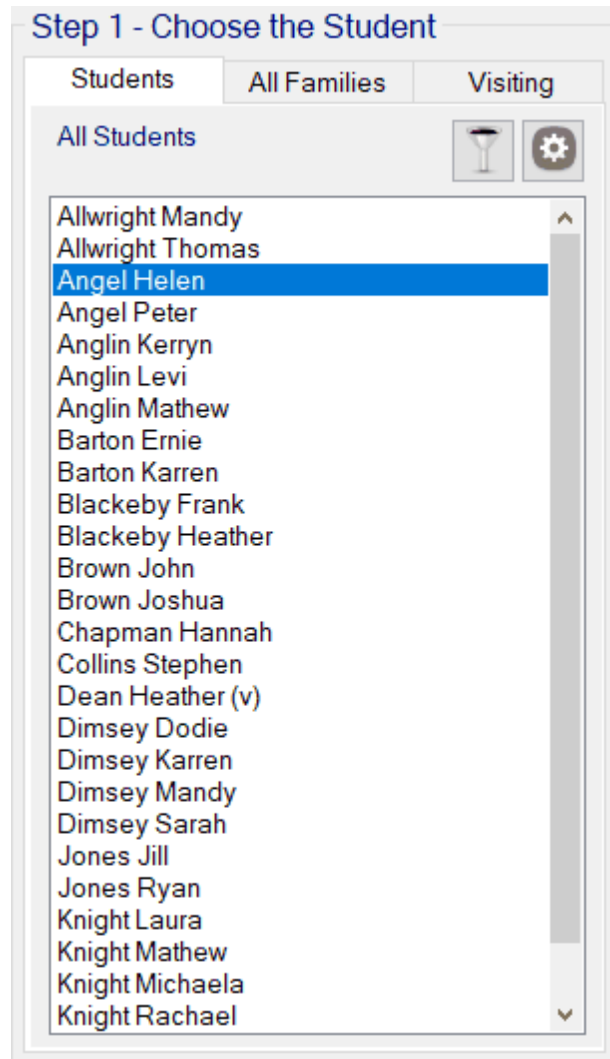
Shown right, you can simply select an existing student to see or alter the class / class's they are in.

#### All Families

Selecting this option lets you select from all people in your main Pastoral Care database. The Filter button when in this window lets you select people using any of the standard built in Pastoral Care [Filters](#).

#### Visiting

Selecting Visiting lets you modify the class for any visitor, and also create a new visitor



### Choose or Change Class

To Choose or change a class, firstly [Choose the Student](#) then the feature (shown right) is activated letting you add or select a class for the selected student.

You can selected Multiple Classes for the same student if they are participating in more than one class.

**Step 2 - Choose or Change Class**

Add View

Department

Sunday School

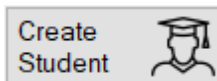
Beginners

Kingdom Kids

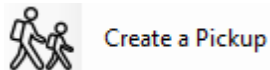
Crusaders

Classmates for Christ

### Create Student button



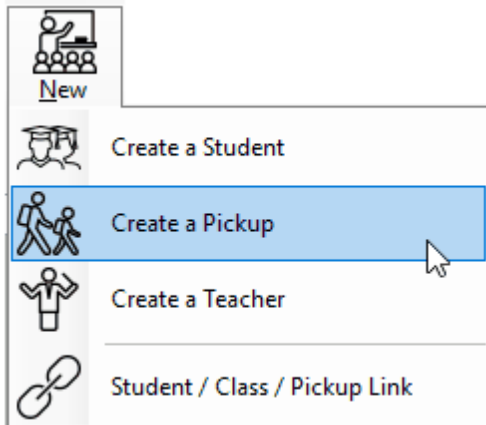
Once you have selected a Student and Class, press the Create Student button to save the Student **Create a Pickup**



A Pickup is a permanent relationship between a Student and a Pickup Person. This is typically between a Child and their Parent / Carer, but can be any combination.

See also [Student / Class / Pickup Link](#) for another way to create a pickup link.

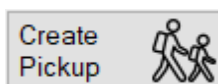
The Student and Pickup person can be Visitors, or people from your main database.



When the New - Create a Pickup item is selected, the window below is loaded. The Create a Pickup window can also be found in some other locations throughout the Classroom Manager feature.



Click on each area of the New Pickup window shown below to learn more



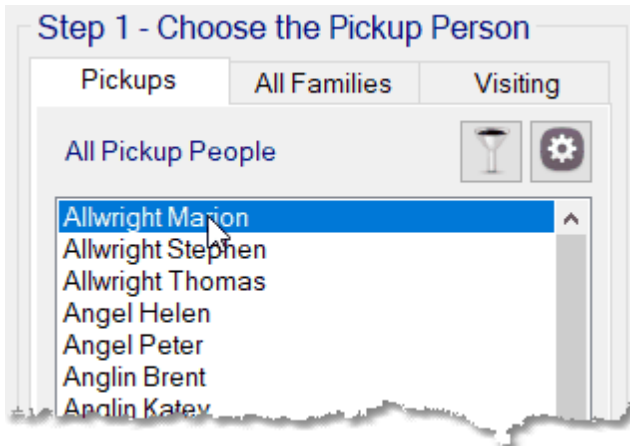
Once you have selected a Pickup Person, and a Student, simply press the Create Pickup button.

### Choose the Pickup Person

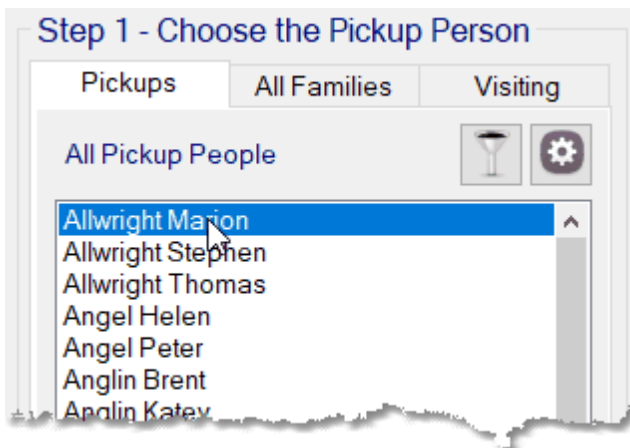
Use this part of the [Create a Pickup](#) form to select the pickup person first, this is the person who will be assigned as an authorised person to pickup a designated student.



Click on Pickups, All Families and Visiting to learn more



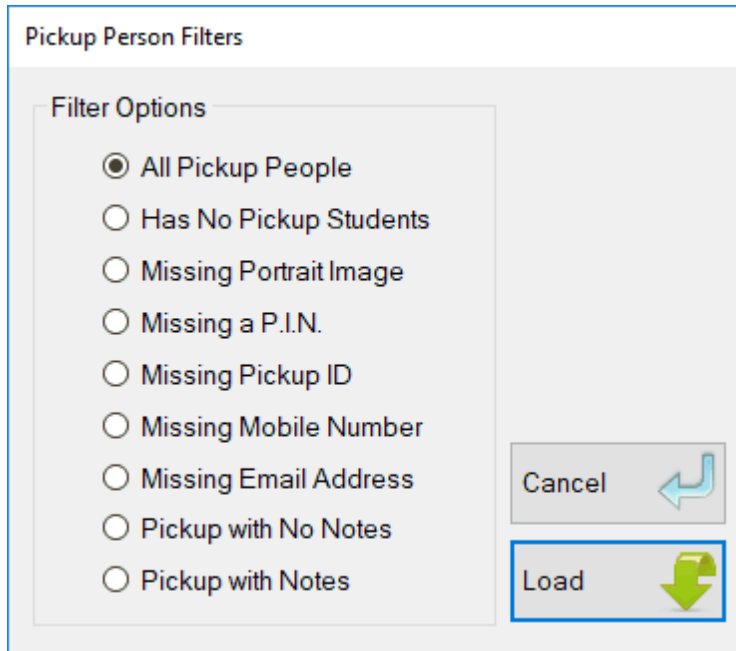
Use the Pickups List to select people already accepted as a pickup person. There are [Filters](#) that control who you can see in this list.



The Filters available for the Pickups List is shown below.

Each of these filters is designed to help you find a person as quickly as possible.



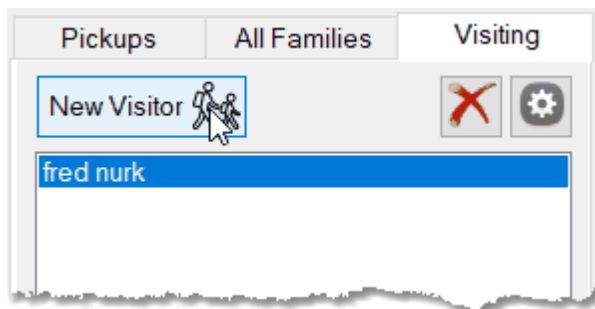


The All Families selection area lets to select anyone in the database using any of the standard Pastoral Care [Filters](#)



The Filters available for the All Families List is a standard Pastoral Care Filters window. Use these filters to select a group or groups of people to load into the Create A Pickup / Select Pickup Person form. [The Advanced Filters Window](#) is the default filters form for all filtering of families / individuals, and the [The Basic Filters Window](#) is also available for simpler selection criteria.

If you are entering or having to enter visitors into the Classroom Manager program, you can! You do not have to add them as a family or individual into the database first. See [New Visitor](#) for information on how to enter a new visitor



The New Visitor window lets you record all you need to know about a person to let them participate in the Classroom Manager area.



Click on each area below to learn more.

Visiting Pickup Person Properties


### Fred Mary Properties...

Surname	<input type="text" value="Nurk"/>
Given Name	<input type="text" value="Mary"/>
Title	<input type="text" value="Mrs."/> ▾
Phone	<input type="text"/>
Mobile	<input type="text" value="04001111111"/>
Email	<input type="text" value="mary@nurkfamily.com"/>
Street	<input type="text" value="2 Handy Court"/>
Suburb	<input type="text" value="Belling"/>
Postcode	<input type="text" value="2020"/>
Pickup ID	<input type="text" value="160"/> <input type="button" value="Test"/> <input checked="" type="checkbox"/>
Added	<input type="text" value="Saturday"/> <input type="text" value="13"/> <input type="text" value="April"/> <input type="text" value="2019"/> ▾

Add / Change Image Via...

Image Editor  WebCam

Students to Pickup





P.I.N. for Collecting the Student(s)...


Currently NO P.I.N. has been Assigned


Notes


The Nurk Family are visiting for the week, will be here only today.


SMS 


Email 

Help 

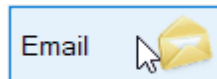
Delete Pickup 

Create Pickup 

Close 

SMS 

Send an SMS to the highlighted person

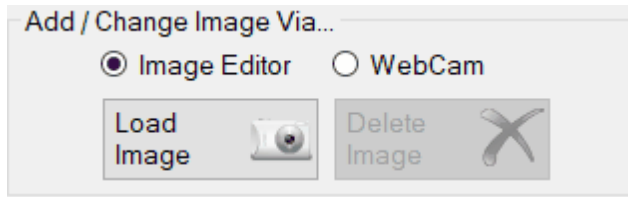


Send an email to the highlighted person

P.I.N. for Collecting the Student(s)...

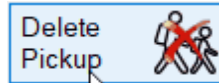
Currently NO P.I.N.

Create a PIN NUMBER for a person to enter into a keyboard when picking up a person.



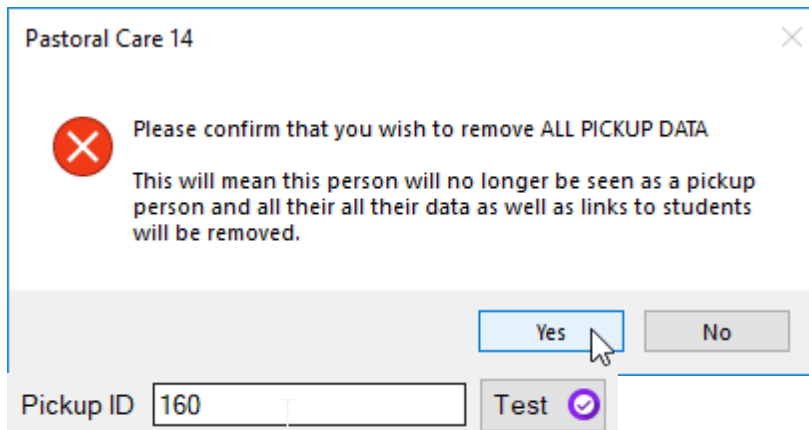
Use the IMAGE area to save a photo of the selected person

You can load an image that you already have on your computer, or for a more practical solution, you can use the Web Cam interface to grab a picture on the spot. See [Via Webcam](#)



This will completely erase the data on the Pickup Person form, and the person entered on this form will no longer be an authorised pickup person.

The following warning is shown when you press the Delete Pickup button.

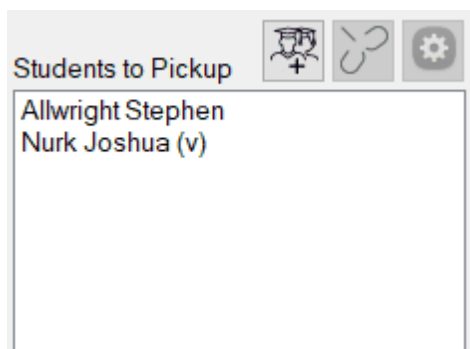


The PICKUP ID lets you enter an alpha or alpha numeric or numeric combination as a UNIQUE identifier for use in the main church auditorium. For example, you should tell the parent what ID you have assigned to their student so that in the event that you need to get a parent / carer into the students area, you can have a data projector operator put up a message with that ID in it to get the parent / carer's attention.

Press the Test Button to make sure you have not used that pickup ID before.

The selection box for selecting Students to pickup can have either students from the Pastoral Care database, OR visitors or a combination of both.

The example below shows Stephen Allwright (in our database) and Joshua Nurk (shown as a visitor with the letter (v) next to his name)



You can select any of the following buttons when active:



Add a New student to the selected Pickup Person (See [Add Student](#))



Break (undo) the link between the selected Pickup Person and Student See([Break Link](#))



Change any properties of the selected Student (See [Student Properties](#))



Press this button to open the Add Student window shown below...



When you see this icon and it is activated, pressing this will break a link between the selected items, for example between a pickup person and a student.

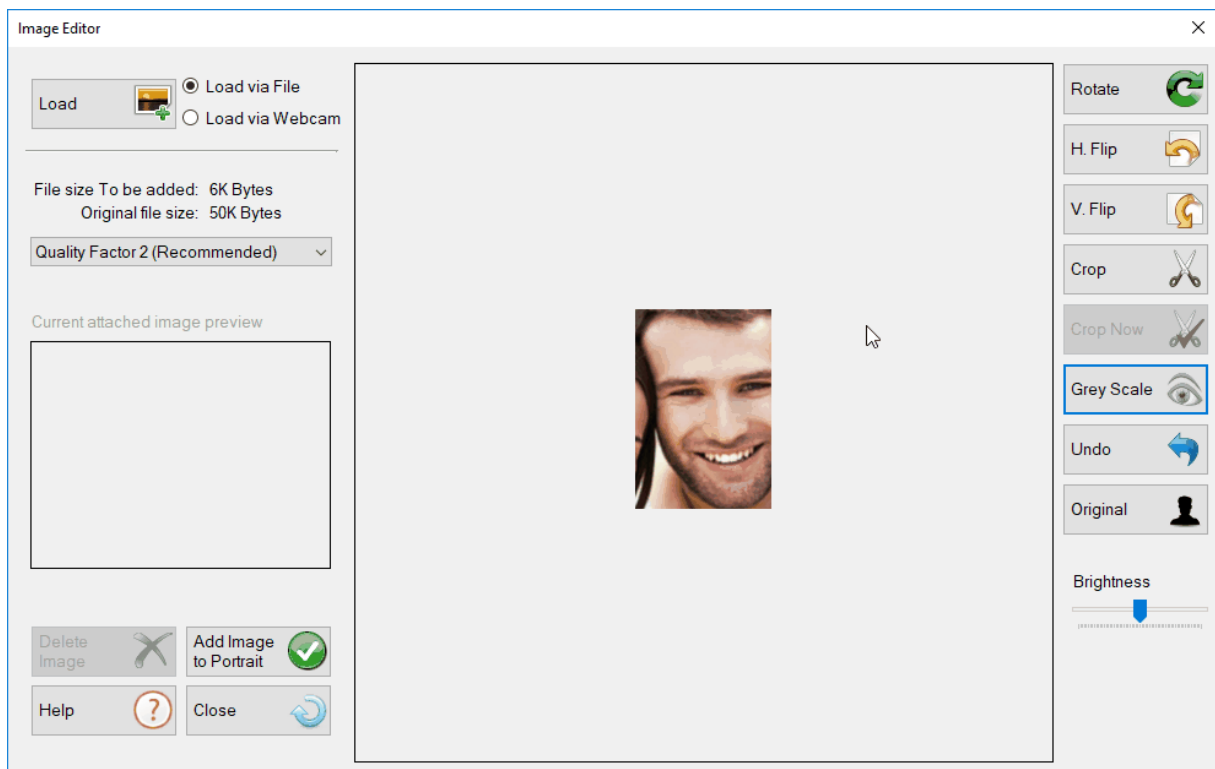


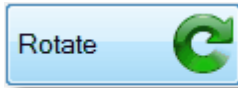
After filling in all information available on the [New Visitor](#) window, press the button to create and save the Visiting Student.

The Load Image button opens up our Image Editor. This is shown below.

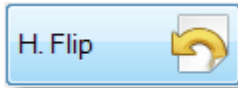


Click on each area below to learn more.

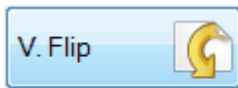




Rotate the image 90 Degrees to the right. Keep pressing this to continue the rotation in 90 degree steps.



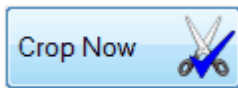
Flip the picture (mirror) horizontally.



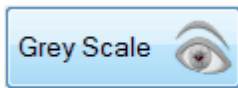
Flip the picture (mirror) vertically.



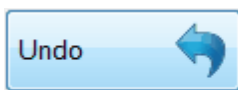
Select an area of the picture to crop.



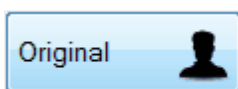
After marking an area with Crop, press the Crop Now button to complete the crop.



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.

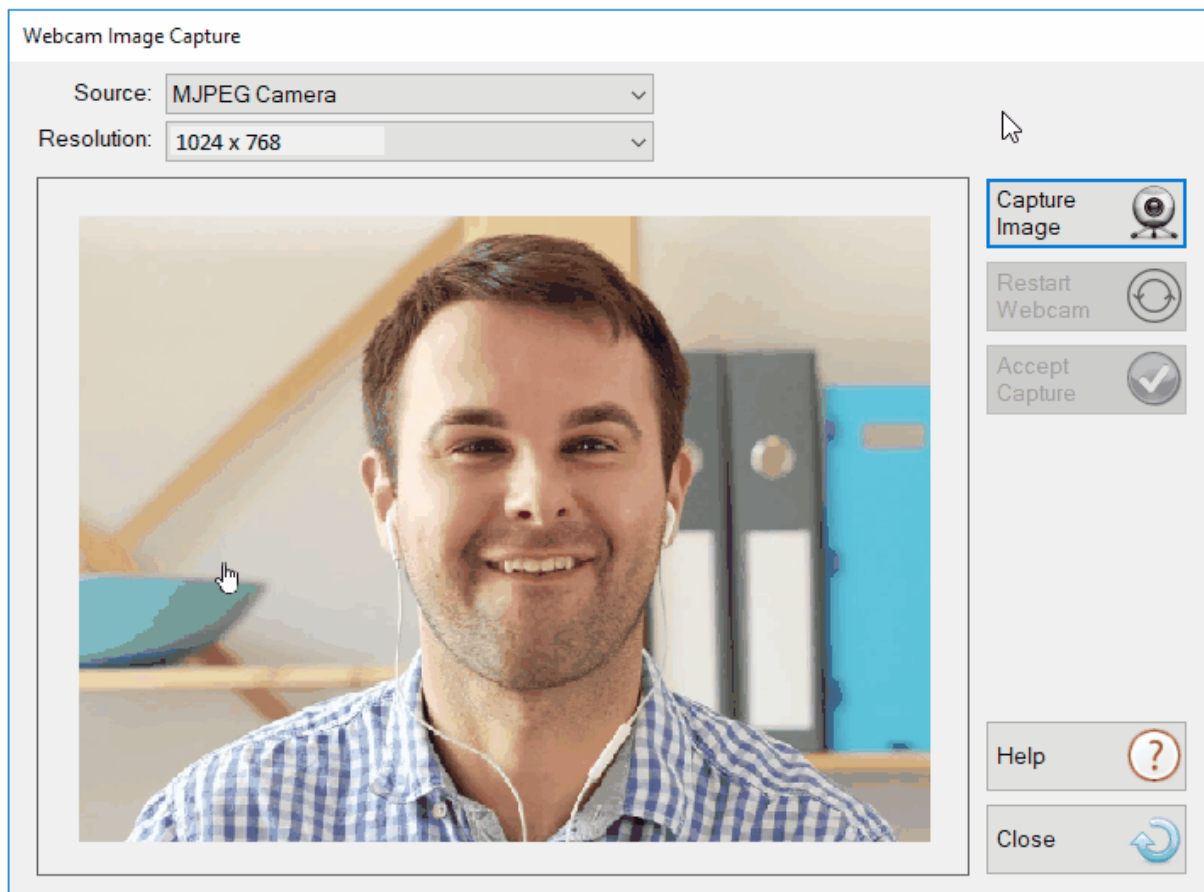
File size To be added: 84K Bytes  
Original file size: 2024K Bytes

Quality Factor 2 (Recommended)

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.

Our webcam support lets you take an image with a Web Cam and use this in several locations within Pastoral Care.

Simply frame the image by moving the camera, and press Capture Image, When happy press Accept Capture



Add the image you can see on the screen to the selected person  
Deleted the image you can see on the screen from the selected person

### Choose the Student

You can select a Student from either the Students Tab, or the All Families Tab. If you create a pickup link with a person from the All Families list, they will be automatically created as a student when the pickup is created.

### Multiple Students

#### with one Pickup

#### Person

Use the Tick Box to select multiple students being authorised for pickup by one pickup person.



Use the Filters button to filter the current list.



Use the Properties button to view and alter any student properties

**Step 2 - Choose the Students**

Students All Families

All Students

Allwright Mandy

Allwright Stephen

Allwright Thomas

Angel Helen

Angel Peter

Anglin Kerry

Anglin Levi

Anglin Mathew

Barton Ernie

Barton Karren

Blackeby Frank

Blackeby Heather

Brown John

Brown Joshua

Chapman Hannah

Collins Stephen

Dean Heather (v)

Dimsey Dodie

Dimsey Karren

Dimsey Mandy

Dimsey Sarah

Jones Jill

Jones Ryan

### Managing Visiting Students

Press the New Visitor button to open the [New Visitor](#) window where you can add visitors to your Classroom Manager.

Note: To use a Visitor as a student in a pickup relationship with a pickup person, you must select them in the [Choose the Student](#) section after creating them as a visitor

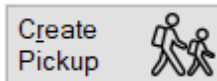
**Manage Visiting Students**

New Visitor

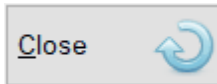
Dean Heather

Nurk Joshua

### Create Pickup Button

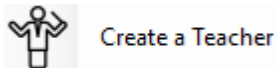


Once you have selected a pickup person, and students to be picked up, press this button to create that relationship.



Press the Close Button to cancel any edits made.

### Create a Teacher



A Teacher must be a member of your Pastoral Care Database. We do not allow for visiting teachers. Given the requirements for Working with Children legislation, having a visiting teacher is not such a good idea!

Perhaps consider adding your teaching events to the Roll program and the Roster Program also to assist in more control of who is having access to your children and when.

The Create Teacher window is shown below.



**Click on each area of the window shown below to learn more**



Create a New Teacher

Teacher To Add



- Allwright Stephen
- Allwright Marion
- Allwright Thomas
- Allwright Mandy
- Angel Peter
- Angel Belinda
- Angel Helen
- Anglin Brent
- Anglin Katey
- Anglin Mathew
- Anglin Levi
- Anglin Kerryn
- Barton Ray
- Barton Ethel
- Barton Ernie
- Barton Karren
- Blackeby Dot
- Blackeby Helen
- Blackeby Heather
- Blackeby Frank
- Brown Peter
- Brown Heather
- Brown Joshua
- Brown John
- Chapman Adrien
- Chapman Ruth**
- Chapman Hannah
- Collins Fred
- Collins Jill


Only people who are Not Teachers are shown in the above list

Dont Exit after Creating Teacher

Add / Change Image Via...

Image Editor  
 WebCam

Load Image  Delete Image 



Notes






Mobile Preference

Use Alternative Mobile

Email Preference

Use Alternative Email

Family Email (adrien@spirit.com.au)

Help 
Email 
SMS 
Create Teacher 
Close 

### Teacher To Add

This list shows ALL PEOPLE in your Pastoral Care Database who are not currently selected as a teacher.

You can use the [Filters](#) button to limit this list to selected people to make the selection more streamlined.

Teacher To Add

- Allwright Stephen
- Allwright Marion
- Allwright Thomas
- Allwright Mandy
- Angel Peter
- Angel Belinda
- Angel Helen
- Anglin Brent
- Anglin Katey
- Anglin Mathew
- Anglin Levi
- Anglin Kerryn
- Barton Ray
- Barton Ethel

### Filters

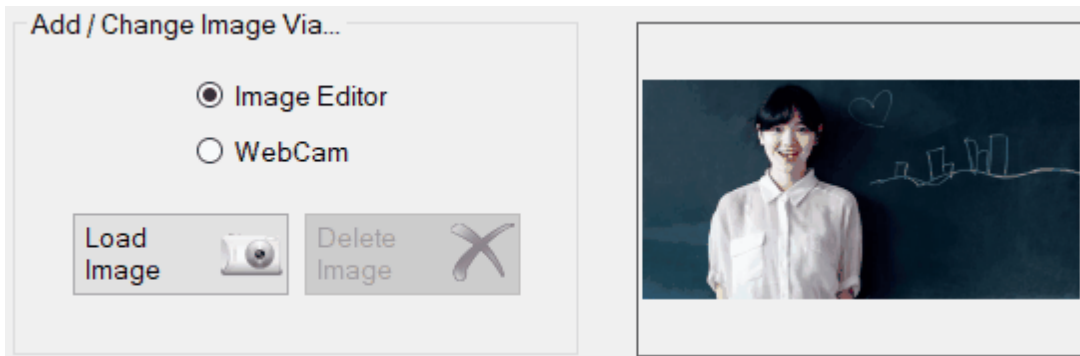


The Filters available for the All Families List is a standard Pastoral Care Filters window. Use these filters to select a group or groups of people to load into the create new teacher list.

[The Advanced Filters Window](#) is the default filters form for all filtering of families / individuals, and the [The Basic Filters Window](#) is also available for simpler selection criteria.

## Image

Use the Image area to add an image with a web cam, or selecting an image on your computer / network.



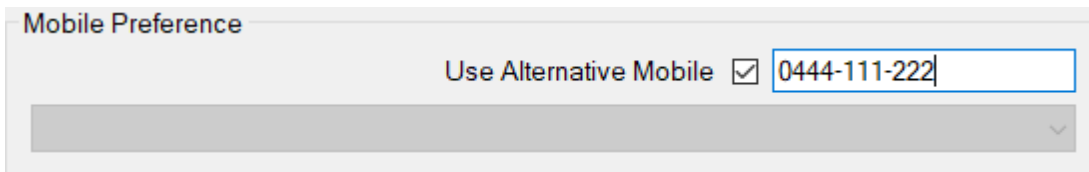
## Notes

Use this area to record any notes about the Teacher that you might need to remember.

## Mobile Preference

The Mobile Preference lets you either use a mobile number from the teachers Family File in Pastoral Care, or you can manually type in an alternative.

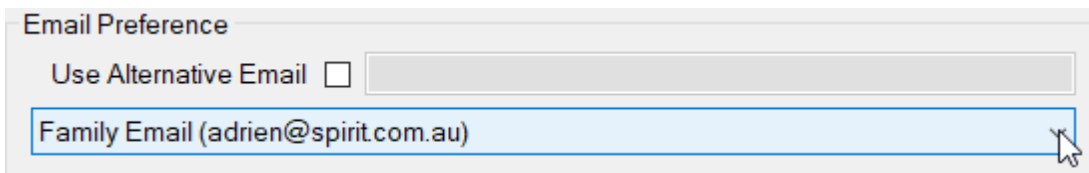
The best preference is to use the one in the database for consistency.



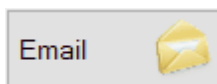
## Email Preference

The Email Preference lets you either use an email address from the teachers Family File in Pastoral Care, or you can manually type in an alternative.

The best preference is to use the one in the database for consistency. Shown below, the Family Email address is being used here.



## Email

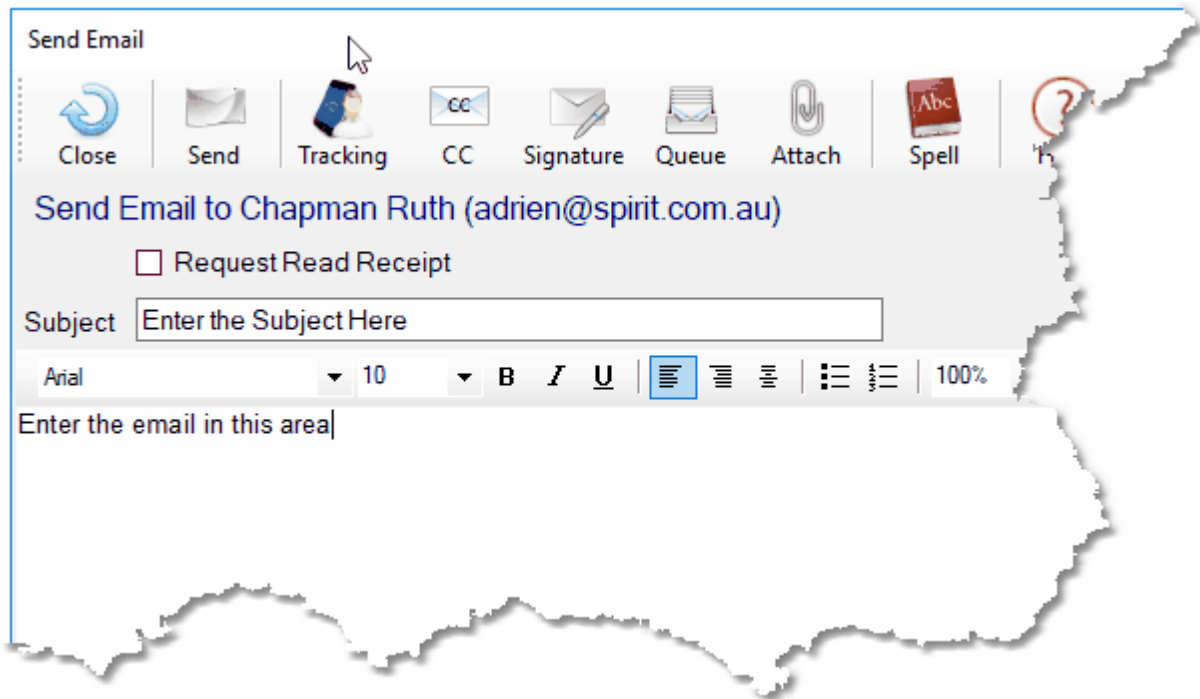


Use the Email Button to send an email to the currently selected teacher.

Press the Email Button opens a pop up window where you can create a quick single email to the selected person.



Click on each area of the window shown below to learn more

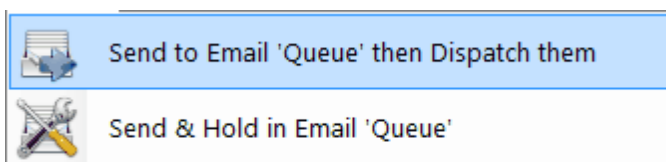


Enter the email Subject here.  
 Enter the Body of the email here  
 Select this if want a read receipt to come back.



After 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.

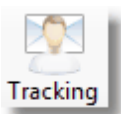


## Send and Dispatch

Send and Dispatch your email now. Your email will be sent 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 your email to the queue program for sending later.



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.

Email Tracking

Send Tracking Email To...

Tag	Surname	Given Name	Email Address
<input type="checkbox"/>	Carrow	Hellen	hellen.carrow@bellingstfellowship.org
<input type="checkbox"/>	Carrow	Peter	peter.carrow@bellingstfellowship.org
<input type="checkbox"/>	Kimmings	Jane	jane.kimmings@bellingstfellowship.org

< >

Help ? Save Close



Press this to add a Carbon Copy email send to one or more people.



Click on each area of the window shown below to learn more

CC Email

All Families Send Carbon Copy of the Email To... Only people with a email address will be displayed

Tag	Surname	Given Name	Email Address
<input type="checkbox"/>	Allwright	Stephen	stephen@spirit.net.au
<input type="checkbox"/>	Allwright	Marion	business email
<input type="checkbox"/>	Angel	Peter	angel@spirit.com.au
<input type="checkbox"/>	Angel	Belinda	angel@spirit.com.au
<input type="checkbox"/>	Anglin	Brent	Brentl@spirit.com.au
<input type="checkbox"/>	Anglin	Katey	Brentl@spirit.com.au
<input type="checkbox"/>	Barton	Ray	ray@spirit.com.au
<input type="checkbox"/>	Barton	Ethel	ray@spirit.com.au
<input type="checkbox"/>	Blackeby	Dot	dot@spirit.com.au
<input type="checkbox"/>	Blackeby	Ernie	ernie@spirit.com.au
<input type="checkbox"/>	Blackeby	Helen	ernie@spirit.com.au
<input type="checkbox"/>	Brown	Peter	peter@spirit.com.au
<input type="checkbox"/>	Brown	Heather	peter@spirit.com.au
<input type="checkbox"/>	Chapman	Adrien	adrien@spirit.com.au
<input type="checkbox"/>	Chapman	Ruth	adrien@spirit.com.au
<input type="checkbox"/>	Collins	Fred	jill@spirit.com.au
<input type="checkbox"/>	Collins	Jill	jill@spirit.com.au

Additional Text to add to Email

Send Email Method  CC  To  Bcc

Choose from any of the mail Pastoral Care groupings to select people from.

- All Families
  - Active Families
  - Privacy Request by Family
  - Active & Privacy Requested
  - Prospect Families
  - Archive Families
  - Main Church
  - Spanish church
  - Home Group 1
  - Home Group 2
  - Home Group 3
  - Home Group 4
- 

Tick to Tag all people in the list, or press the Cross to remove all ticks from the list.

Tick (Tag) those people you want to send a CC to.

Tag	Surname	Given Name	Email Address
<input type="checkbox"/>	Allwright	Stephen	stephen@spirit.net.au
<input type="checkbox"/>	Allwright	Marion	business email
<input type="checkbox"/>	Angel	Peter	angel@spirit.com.au
<input type="checkbox"/>	Angel	Belinda	angel@spirit.com.au
<input type="checkbox"/>	Anglin	Brent	Brentl@spirit.com.au
<input type="checkbox"/>	Anglin	Katey	Brentl@spirit.com.au

Use the Additional Text to add more information JUST to the CC people.  
Choose the method of sending a Copy to.

CC will be a normal Carbon Copy and all people receiving the email will know who received it.  
To will put all names in the To Field and all email addresses will be seen by all  
BCC will send a Blind Carbon Copy where no one will see the other address information.

Send Email Method  CC  To  Bcc

This window lets you set the DEFAULT signature to use for the current workstation. Simply select the Signature File listed in the top section, and press Activate. Pressing Deactivate will remove the default signature. See [Signature](#) for more information on this.

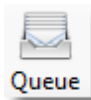
Choose a Default Signature Document

Available Documents

OfficeAdmin

Preview

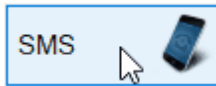
To create Signature Documents that are used here return to the Main Menu, choose Utilities then Signature Designer



The Queue Button opens the standard Email Queue program. See [Email Queue](#) for full details.



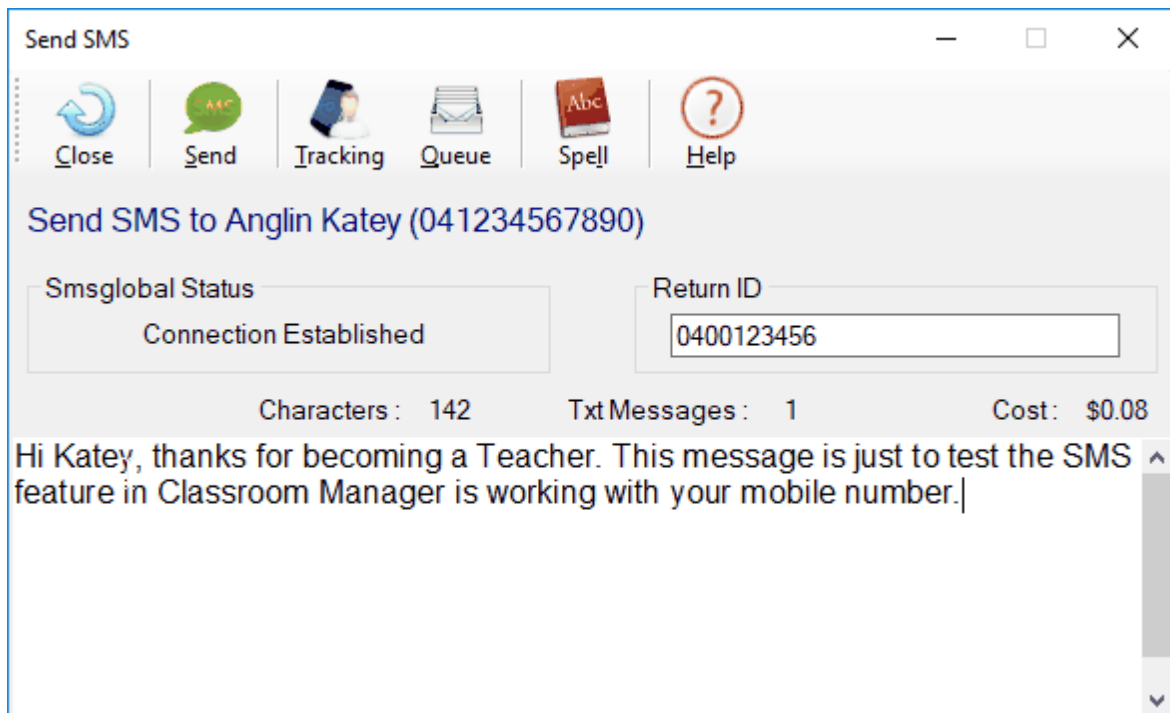
Press this to attach a file to the email before sending.

**SMS**

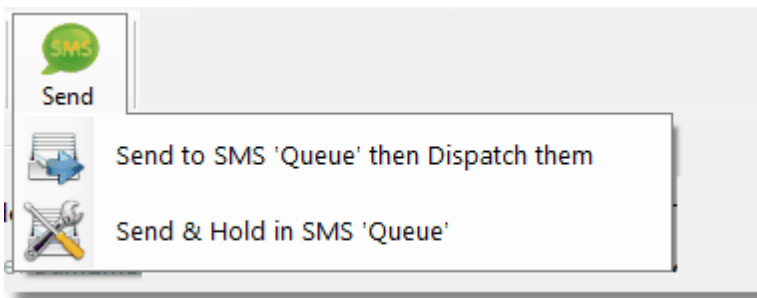
Use the SMS Button to send an SMS to the currently selected teacher. SMS button from the Create Teacher area lets you send an SMS to that teacher while you are adding them to the Classroom Manager.



Click on each area of the window shown below to learn more



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

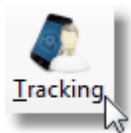
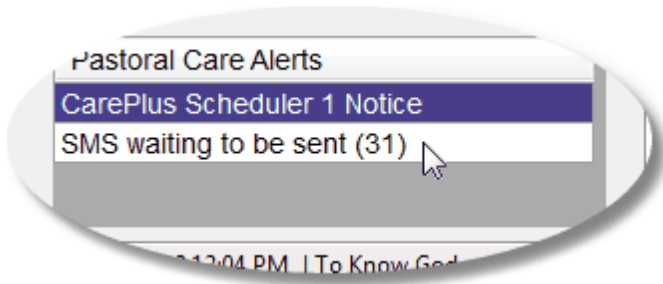
**Send to Queue and Dispatch**

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

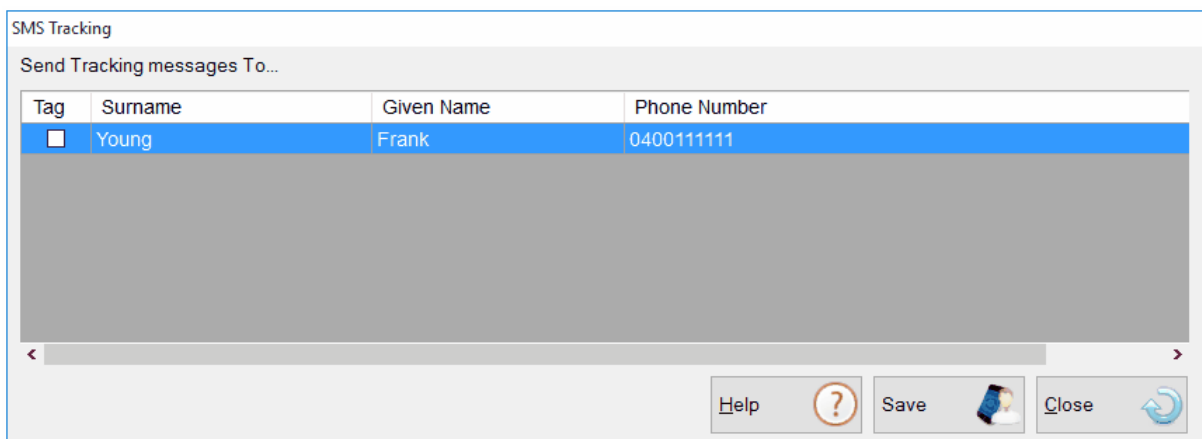
This option sends SMS messages to the [SMS Queue](#) program, and holds the messages to be sent later. If you send using this method, Pastoral Care will place a reminder on the main menu that SMS messages are ready to be sent.



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.

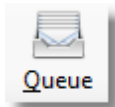
## Save Settings

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.

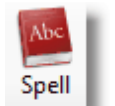




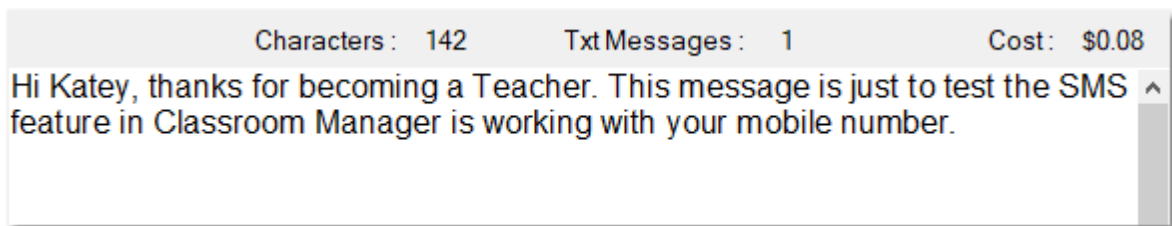
The SMS Queue area is in fact a new program that is automatically controlled from Pastoral Care itself. It takes SMS messages off Pastoral Care, and sends them on either later (manually) or immediately (automatically).



Pressing the Queue button will open the standard [SMS Queue](#) window

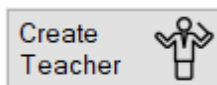


Access the Spell Checker Settings



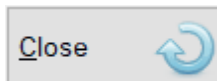
Compose your SMS here, you can watch the number of characters above this as you type.

#### Create Teacher



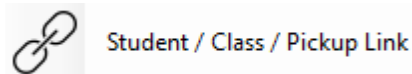
After selecting a person to be a teacher, and setting any other information on the [Create a Teacher](#) window, press Create Teacher to save your changes.

#### Close



Press the Close Button to cancel any edits made.

#### Student / Class / Pickup Link



Student / Class / Pickup Links are created to assist in creating "Normal" events for each student. You can see on the screen below (Found by selecting New - Student / Class / Pickup Link from the toolbar) that you can select a Student, and link them to a normal Class and a Normal Pickup person. This is perfect for most people who are habitual in the drop and and pickup process.

#### Simply:

- 1: Select the Student
- 2: Tick the Class they attend
- 3: Select the person who normally picks them up



Click on the various parts of the image below of the Create New Link to learn more about each area / feature.

Create New Link

**Step 1 - Choose the Student**

Students | All Families | Visiting

All Students

- Allwright Mandy
- Allwright Thomas
- Angel Helen
- Angel Peter
- Anglin Kerry
- Anglin Levi
- Anglin Mathew
- Barton Ernie
- Barton Karren
- Blackeby Frank
- Blackeby Heather
- Brown John
- Brown Joshua
- Chapman Hannah
- Collins Stephen
- Dean Heather (v)
- Dimsey Dodie
- Dimsey Karren
- Dimsey Mandy
- Dimsey Sarah
- Jones Jill
- Jones Ryan
- Knight Laura
- Knight Mathew
- Knight Michaela
- Knight Rachael

Dont Exit after Creating Link (v) = Visitor

Automatically select Step 3 tab after selecting Step 1 Student

**Step 2 - Choose the Class**

Add | View

Department

Sunday School

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

**Step 3 - Choose the Pickup Person**

Family File | All Families | Visiting

- Allwright Stephen
- Allwright Marion
- Allwright Thomas
- Allwright Mandy

Help ? Create Link Close

### Choose Student

**Step 1 - Choose the Student**

Students | All Families | Visiting

All Students

- Allwright Mandy
- Allwright Thomas
- Angel Helen
- Angel Peter
- Anglin Kerry
- Anglin Levi
- Anglin Mathew
- Barton Ernie
- Barton Karren
- Blackeby Frank
- Blackeby Heather
- Brown John
- Brown Joshua
- Chapman Hannah
- Collins Stephen
- Dean Heather (v)
- Dimsey Dodie
- Dimsey Karren
- Dimsey Mandy
- Dimsey Sarah
- Jones Jill
- Jones Ryan
- Knight Laura
- Knight Mathew
- Knight Michaela
- Knight Rachael

Use this area (Shown Left) to find and select a student that you want to create a pickup link for.

#### Current Students

These are listed on the Students Tab (Shown)

#### All Families

Select from All Families in your Pastoral Care Database

#### Visiting

A very useful feature, select Visiting so you can enter an add hock visitor as a person coming to a class.

#### Filter Option



Press this to show the following **Load Options**, This window will let you repopulate the Students List with a new selection based on this load form. (If you are using the All Families option, the Filter Button loads the Pastoral Care standard filters window)

Load Options

Load all Students

Load all Classes

Load Specific Class

Load all Students Not in a Class

Display only Students Missing Pickup Person

Sunday School

Beginners  
Kingdom Kids  
Crusaders  
Classmates for Christ

Cancel Load



Click the gear icon in the Student selection area shown above to access properties for the selected student. See [Student Properties](#)

### Choose Class

After selecting a student ([Choose Student](#)) you can use the Add tab in the Choose Class section to select a department and class that the student attends. A student can be selected for multiple classes in this form.

Add View

Department

Sunday School

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

### Choose Pickup Person

After selecting a Student, their Class or Classes, you can then select the Pickup Person. This process will create a relationship between Student, Class and Pickup Person.

Options for Pickup Person include:


**Family File :** Select a person from the students family

**All Families :** Select any person from your Pastoral Care database

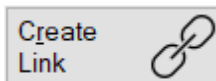
**Visiting :** Select a Visitor as the pickup person

**Step 3 - Choose the Pickup Person**

Family File   All Families   Visiting



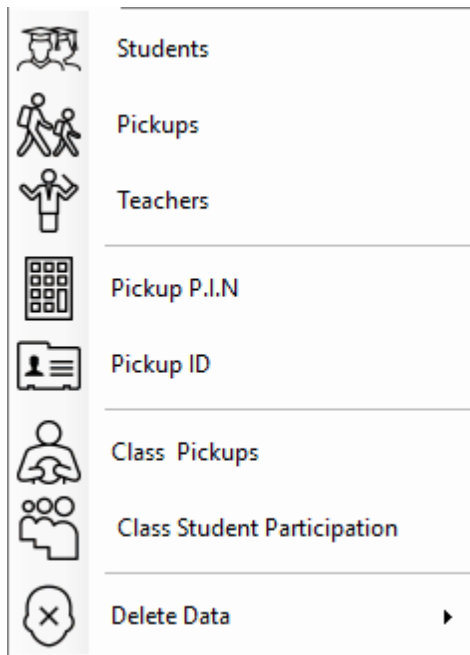
- Allwright Stephen
- Allwright Marion
- Allwright Thomas
- Allwright Mandy

**Create Link**

Once you have selected the Student, Class and Pickup Person, press the Create Link button to set that relationship. You can press Close to exit this form without saving any changes.

**Classroom Manager Manage**

Click on each of the manage Menu Items shown below to learn more about each function



### Students

The Manage Students area lets to make changes to selected students.

To be able to easily find the student(s) you are looking for to edit, the [Load Students](#) window is opened when you select Manage - Students from the toolbar.

After you have selected students to load, the following window is opened.



Click on the various parts of the image below to learn more about the Manage Students window.

Manage Students

All Students

Students

- Allwright Mandy
- Allwright Stephen
- Allwright Thomas
- Angel Helen
- Angel Peter
- Anglin Kerry
- Anglin Levi
- Anglin Mathew
- Barton Ernie
- Barton Karren
- Blackeby Frank
- Blackeby Heather
- Brown John
- Brown Joshua
- Chapman Hannah
- Collins Stephen
- Dean Heather (v)
- Dimsey Dodie
- Dimsey Karren
- Dimsey Mandy
- Dimsey Sarah
- Jones Jill
- Jones Ryan
- Knight Laura
- Knight Mathew
- Knight Michaela
- Knight Rachael
- McCoy David
- McCoy Kylie
- Nurk Joshua (v)

(v) = Visitor

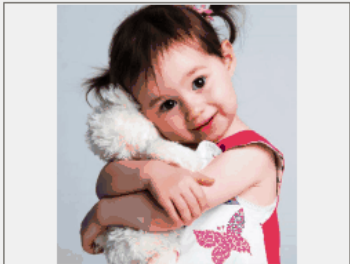
Pickup Person

Allwright Marion  
Allwright Stephen  
Angel Peter

Department

Sunday School

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ



Add/Change Image Via...

Image Editor  WebCam

Medical Alert  
 Custody Alert  
 Child Protection Order in Place  
 Family Violence Alert

Notes

Has Asthma, see family records for more data

Help ?   Move To Church DB   Build Link   ReLoad   Close

### Load Students

Use the Load Student window to pre-filter for selected students.



Click on each of the toolbar items to learn more about each function

Student Load Options

Load Options

- All Students
- All Students in Class
- All Student Visitors
- All Students Not in Any Class
- All Families in Pastoral Care

Filter Students on...

- Medical Alert
- Custody Alert
- Child Protection Order
- Family Violence Alert
- Missing a Portrait Image
- Missing Mobile
- Missing Email
- Students with No Pickups
- Students with No Notes
- Students with Notes

Department

Sunday School

Load All Students in Classes

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

Help ?

Cancel ↩

Load ↓

Select from any of the options below before pressing the Load Button

Load Options

- All Students
- All Students in Class
- All Student Visitors
- All Students Not in Any Class
- All Families in Pastoral Care

Select a filter or more than one to help find a group of students.

Filter Students on...

- Medical Alert
- Custody Alert
- Child Protection Order
- Family Violence Alert
- Missing a Portrait Image
- Missing Mobile
- Missing Email
- Students with No Pickups
- Students with No Notes
- Students with Notes


Select a Department and then tick the classes you want to load. Or tick the Load All Students button to load everyone in the selected department.

Department

Sunday School

Load All Students in Classes

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

Load 

Press this to load the students filtered by the options set in [Load Options](#), [Filter Students On](#) and [Department](#) settings



### Create New Student



Pressing this button will take you to the [Create a Student](#) window

### Add New Pickup



pressing this on the Manage Students window will open a Create Pickup form to create a new pickup or edit pickups for the selected person. In the sample below we are managing pickups for Mandy Allwright. Simply select more or less pickup people as needed from Mandy's Family, All Families or Visitors and press the **Create Link** to complete. Pressing Close will not save any changes.

Create a New Pickup Link

Pickups for Allwright Mandy

Dont Exit after Creating Link

Select the Pickup Person

Family File All Families Visiting

Allwright Stephen  
 Allwright Thomas  
 Allwright Mandy

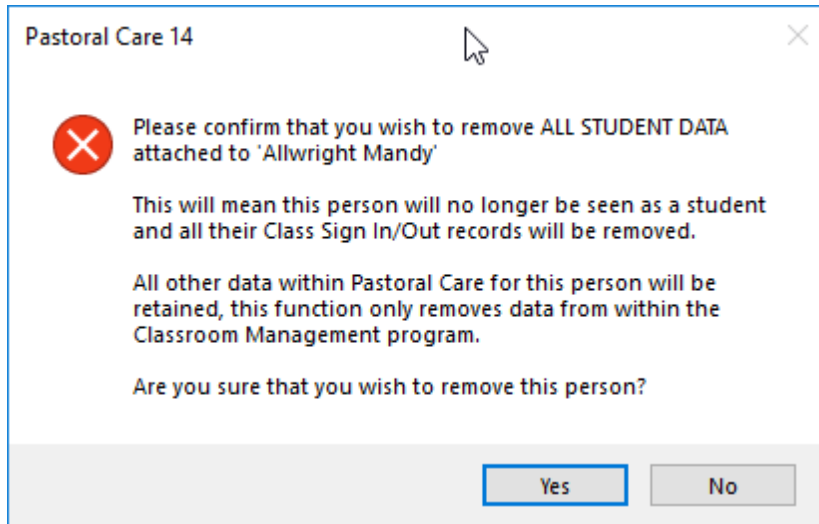
Help ?  
Create Link  
Close

### Delete Student



Pressing this will delete the selected Student as a student in the Classroom Manager.

The following warning is displayed to warn you of what you are about to do!



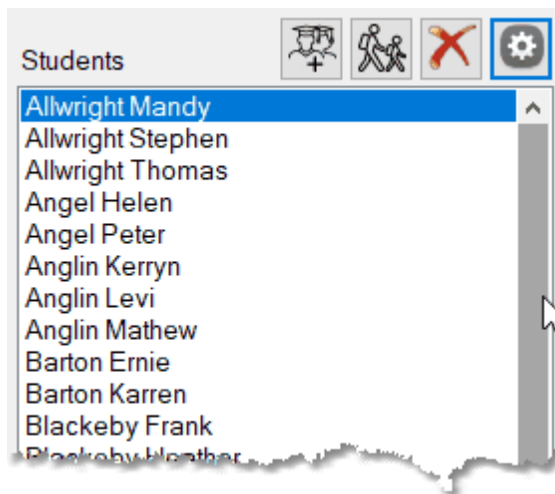
### Student Properties



Click this button to open the [Student Properties](#)

### Students

The Students list on the Manage Students window lists all students in the Classroom Manager. After selecting a student the 4 control buttons shown become active for the following functions: [Create New Student](#), [Add New Pickup](#), [Delete Student](#), [Student Properties](#)



### Pickup Person

The people listed here are the people assigned to the SELECTED STUDENT as pickup people.



Press this to break the link and remove a person from the pickup list.



Press this to see the [Pickup Properties](#) for the selected Pickup

Pickup Person

- Allwright Marion
- Allwright Stephen
- Angel Peter

### Department

The Department area lets you select / change the class / classes that the selected student participates in.

See [Classroom Departments](#) for more information

Department

Sunday School

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

### Classes

After selecting a department, Classes are available to edit.

See [Classroom Departments](#) for more information

Department

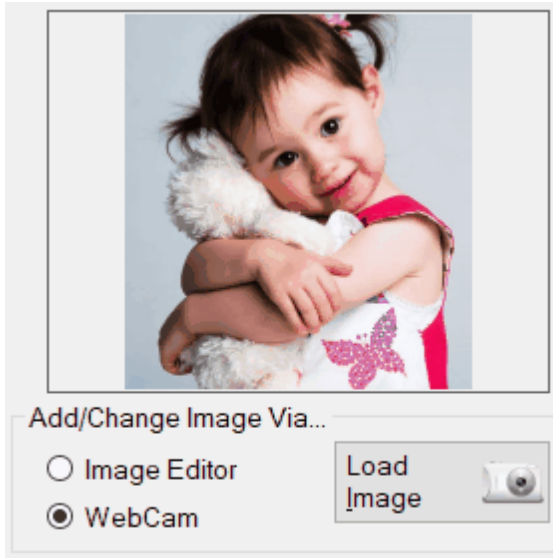
Sunday School

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

### Image

This area shows the picture of the selected student, and or lets you add a picture of the student.

See [Via Webcam](#) for more information



### Alerts

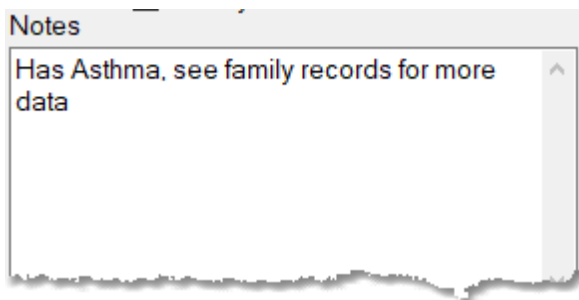
Each student can have any or all of 4 important alerts  
Simply tick any that apply.

Staff are notified of alerts on students at the drop off and pick up events if you are using the Sign In / Sign Out feature.

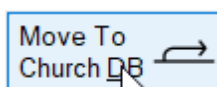
- Medical Alert
- Custody Alert
- Child Protection Order in Place
- Family Violence Alert

### Notes

Enter any important notes for the Student.



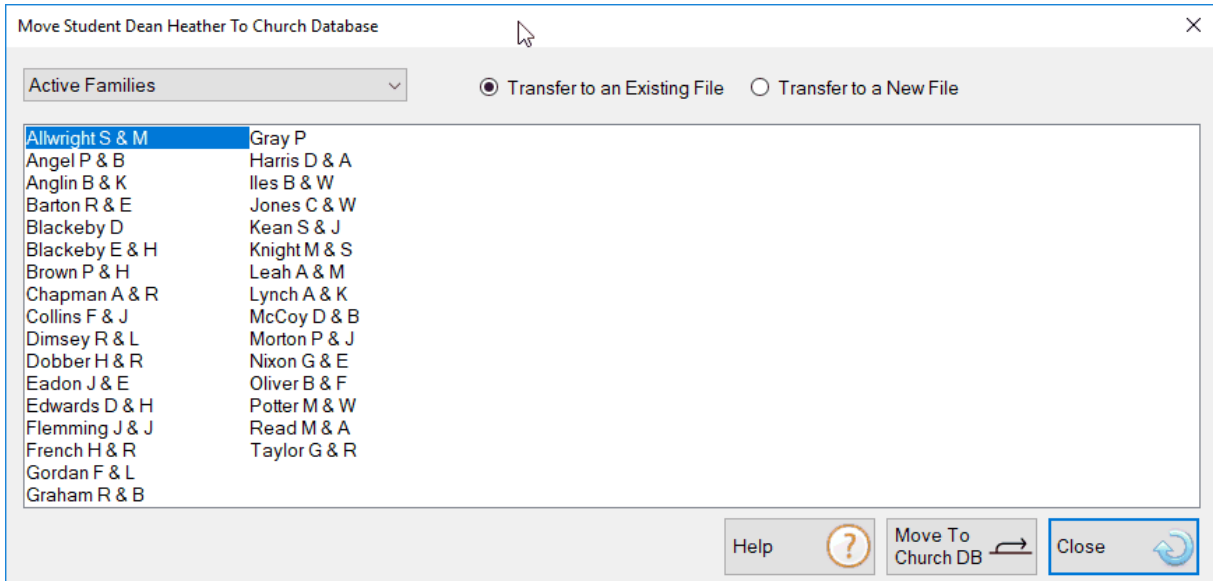
### Move to Church DB



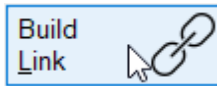
If the student is a Visitor, this button becomes enabled. Pressing this button opens the [Add Student to Database](#) window that lets you add this person to your database.

You can simply select a family to move the student into, or use the Transfer to a New File to create a new family file. For more than one person to add to the family, firstly use the Transfer to a New File option, then use the Transfer to Existing File to keep adding family members. You will then probably

need to go into that family file from the Pastoral Care main menu and edit the positions of each person to put them in the Adult and Child areas.



#### Build Link

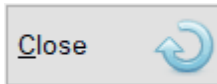


After selecting a Student and a Pickup Person, the Build Link button will save that link, or save any additional changes you have made.

#### ReLoad

Reload the window from fresh. This will open the [Load Students](#) window again letting you reselect any filters for loading students.

#### Close



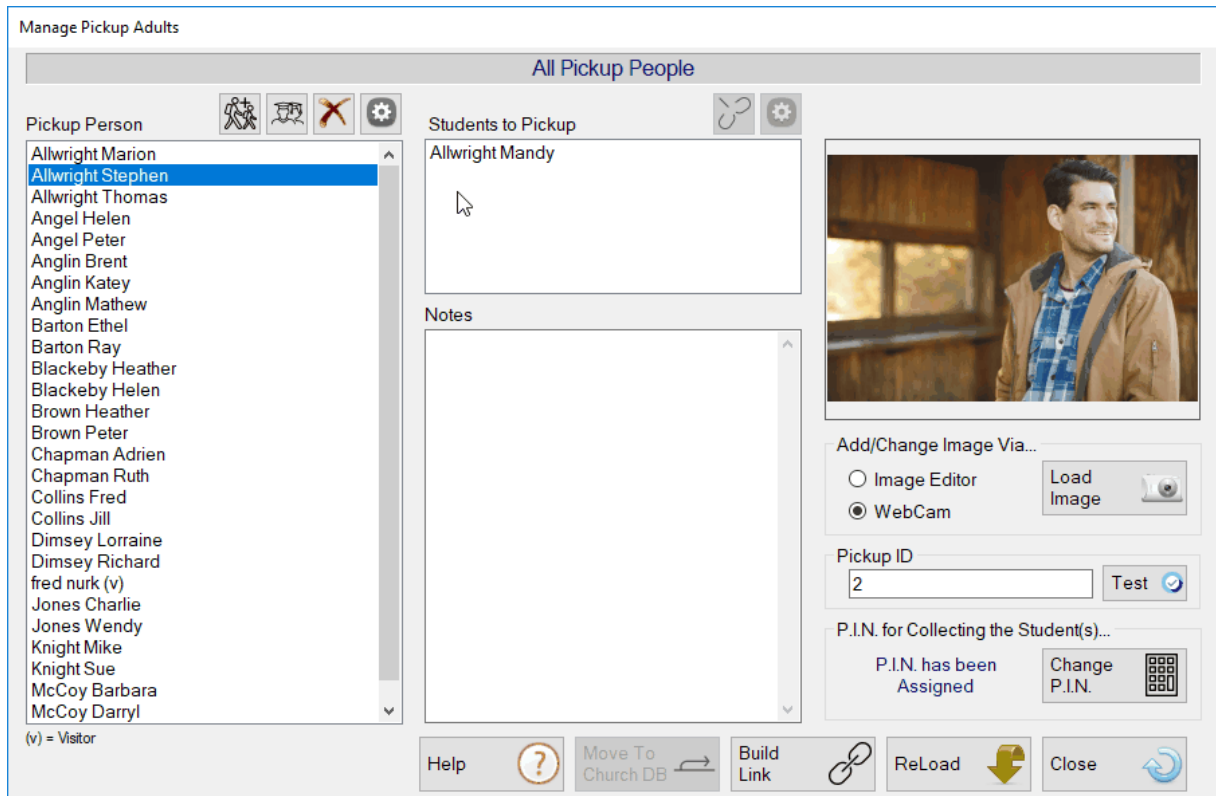
Press the Close Button to cancel any edits made.

#### Pickups

The Manage Pickups window is shown below. From here you can look at every pickup person and check properties, add students, remove pickups and set other settings such as PIN numbers and Pickup ID's.



Click on each area of the Manage Pickups windows below to learn more about each function



### Pickup Person

This is a list of all pickup people loaded by the Load Pickup people filters. Those options are presented to you each time this window is opened, or you press Reload.



### Add New Pickup



Press the Add New Pickup button to show the [Create a Pickup](#) window.

### Add Student for Pickup



Press the Add Student for Pickup to open the following window.

From here you can add more students for picking up by the currently selected Pickup Person.

Create a New Student Link

### Student Pickups for Allwright Stephen

(v) = Visiting Student

#### Select the Student

Students
All Families

All Students

- Allwright Mandy
- Allwright Stephen
- Allwright Thomas
- Angel Helen
- Angel Peter
- Anglin Kerryln
- Anglin Levi
- Anglin Mathew
- Barton Ernie
- Barton Karren
- Blackeby Frank
- Blackeby Heather
- Brown John
- Brown Joshua
- Chapman Hannah
- Collins Stephen
- Dean Heather (v)
- Dimsey Dodie
- Dimsey Karren
- Dimsey Mandy
- Dimsey Sarah
- Jones Jill
- Jones Ryan

#### Manage Visiting Students

New Visitor

Dean Heather  
Nurk Joshua

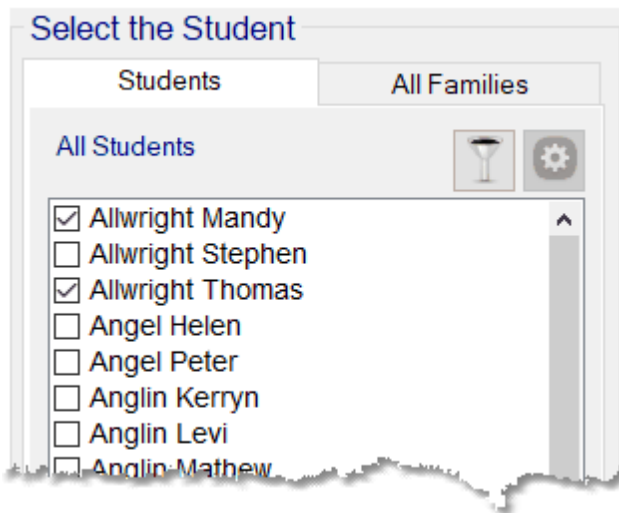
Dont Exit after Creating Link 

Help

Create Link

Close

To select a student for a pickup with the currently selected pickup person, select them with the mouse to add one student, or tick the selection box to add more than one student for current pickup person.



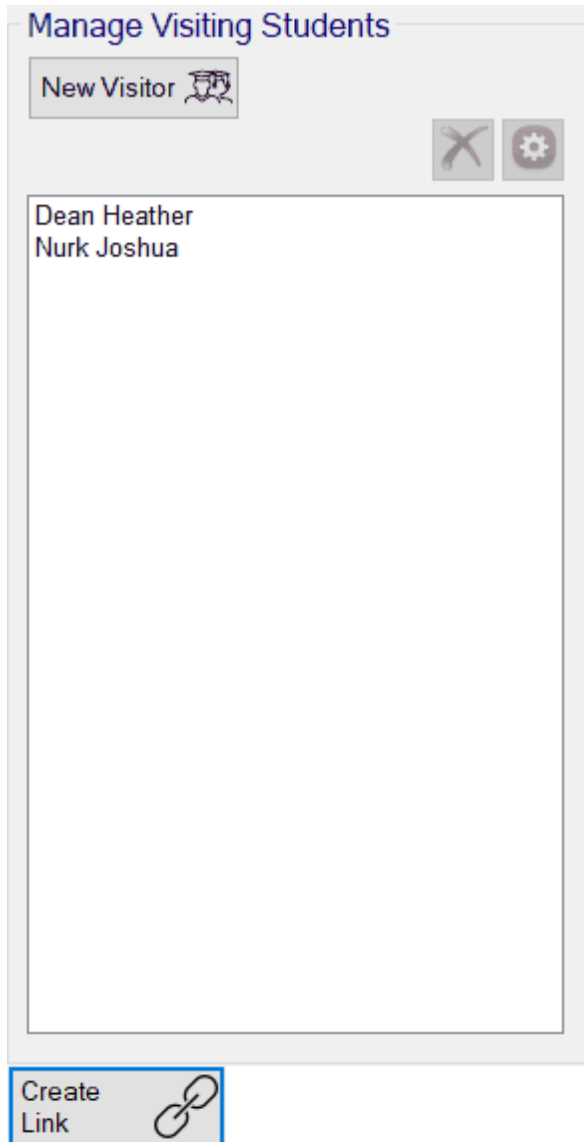
Use Filters to locate selected groups of people. This can make selection of people to work with faster and more accurate.



Access the [Student Properties](#) for the selected student.  
Use the New Visitor button to create a new visitor to be picked up by the currently selected Pickup Person.

You can create Visitors on this side of the form, you need to select them on the left side in the [Select the Student](#) area to link them to a pickup person.





Once you have selected the Student, you can press the Create Link button to create the pickup link.

#### **Break Student Link**



Break (undo) the link between the selected Pickup Person and Student See([Break Link](#))

#### **Student Properties**

Check or change properties for the selected Student. See [Student Properties](#) for more details.

#### **Delete Pickup**



Press this to delete the link between the pickup person and the selected student.

The following confirmation box is loaded to give you a choice of what to delete, and to confirm this is what you want to complete...

**Pickup Delete Option**

Remove Picking up all Students  
(This removes all links from the selected pickup person)

Remove this person from being a Pickup Person  
(Remove all links and remove this person from being assigned as a pickup)

Cancel    Delete

### Pickup Properties

Check or change the Pickup Properties for the selected pickup. See [Pickup Properties](#) for more information.

### Students To Pickup

This list shows the students that the selected pickup person is picking up.

**Students to Pickup**

Allwright Mandy  
Allwright Thomas

### Notes

Enter any notes for the currently selected pickup.

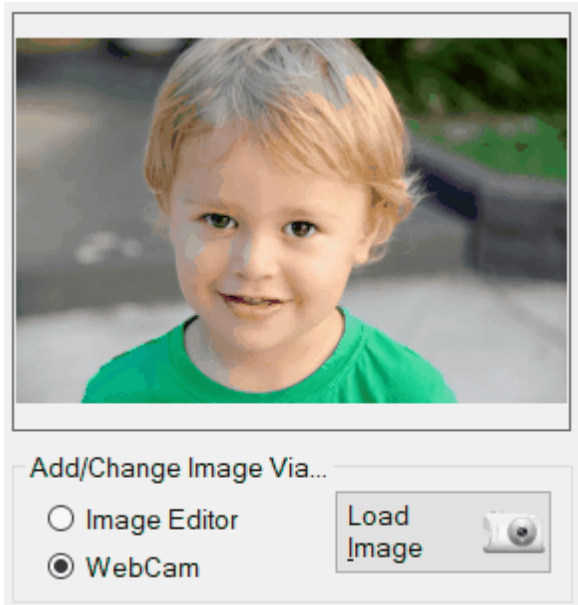
**Notes**

Please try and make sure Mandy and Thomas are ready for pickup together. Thomas mucks around after kids club and is often late for pickup.

### Image

View or Make changes to the selected persons Image.

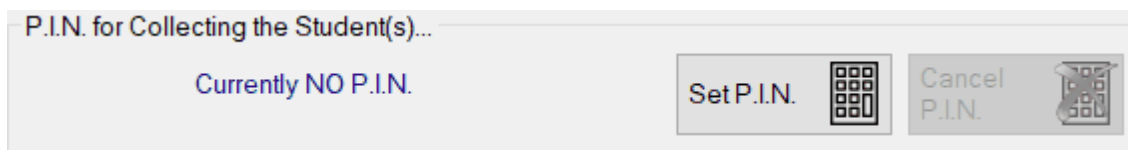
See ([Via Webcam](#)) for information on how to use the Web Cam capture feature



### Pickup ID

The Pickup ID is used as a depersonalised identification of a person to be announced or projected on a data projector during church to grab the attention of a parent / carer to come to their child.

### PIN Number

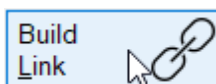


Create a PIN NUMBER for a person to enter into a keyboard when picking up a person. Pin Numbers will be forced to be unique, so you will be notified if a pin number is already used.

### Move to Church Database

Press this button to move a visitor to your Pastoral Care Database See [Move to Church DB](#) for more details

### Build Link



After selecting a Student and a Pickup Person, the Build Link button will save that link, or save any additional changes you have made.


### Reload


Reload the window from fresh. This will open the following window where you can select filters to gather people of interest.

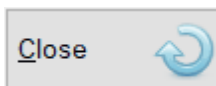
**Pickup Person Filters**

**Filter Options**

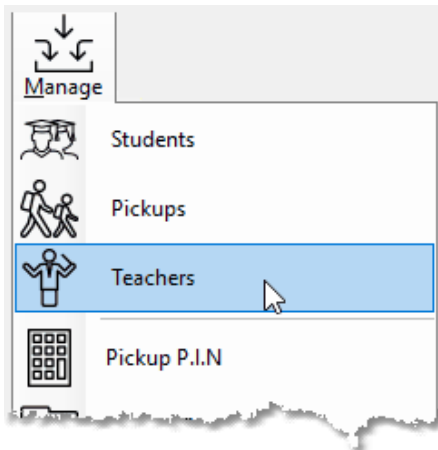
- All Pickup People
- Has No Pickup Students
- Missing Portrait Image
- Missing a P.I.N.
- Missing Pickup ID
- Missing Mobile Number
- Missing Email Address
- Pickup with No Notes
- Pickup with Notes

Cancel 

Load 

**Close**

Press the Close Button to cancel any edits made.

**Manage Teachers**

The Manage Teachers area (Press Manage on the toolbar, then Teachers) lets you make changes to your teachers list. Adding, Deleting or Editing information and teachers can all be done from here. The first form that opens is the Filter Window letting you select the people you want to work with. See [Filter Teachers](#)

**Filter Teachers**

Use this form to filter selected groups of Teachers to help you narrow down the number of people loaded. If you don't have a lot of teachers in your Classroom manager, just press Load to Load All Teachers straight away.

**Teacher Filter**

Department  
Sunday School

Load All Teachers in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

**Load Options**

All Teachers  
 Teachers in a Class  
 Teachers Not in a Class

**Filter Teachers with...**

Missing Mobile  
 Missing Email  
 Missing Portrait

Help ?  
Cancel ↩  
Load ↓

### Manage Teachers Window

Shown below is the Manage Teachers window with one teacher selected.



Click on each area of this window to learn more about Managing Teachers

Select a teacher to view their settings and make changes.



Press the Add Teacher button to add a new teacher. See [Create a Teacher](#) for more details.

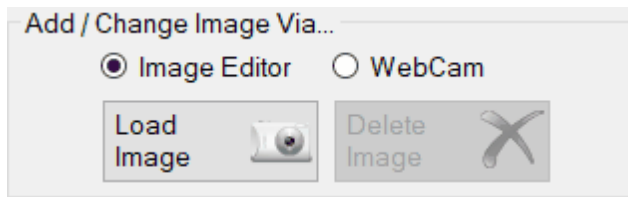


Press this button on the Manage Teacher window to delete the selected teacher. This does not remove this person from the Pastoral Care database.



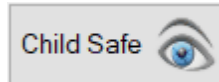
Click the properties ICON to see the properties of the selected teacher. See also [Teacher Properties](#)

Select what departments and class/ classes this teacher works in. See also [Classroom Departments](#)  
Enter any notes about the teacher.



Use the IMAGE area to save a photo of the selected teacher.

You can load an image that you already have on your computer, or for a more practical solution, you can use the Web Cam interface to grab a picture on the spot. See [Via Webcam](#)



The Child Safe button opens a window with information from the Pastoral Care Child Safe area. All Teachers of children in Australia must have a local state Working With Children authority in combination with a current Police Check. You can check on the information you have on file for the selected teacher by pressing this button.

Shown below is a sample Child Safe lookup window. All information displayed is only for the selected teacher, and their name is in the top caption area of the window. See [Child Safe](#) for complete details on the use of the Child Safe feature in Pastoral Care.

Child Safe Record (Teacher = Allwright Stephen) X

Compliance Type  
Blue Card Help ? Close ↻

### Child Safe Records For Stephen Allwright

Details | Notes | Application | Referee | Incidents | Audit

Risk Rating  
Low v

Current Status  
Current v

Review  
No Selection v

Procedure

- Certificate Received
- Interview Completed
- Police Check Done

Click on the Date cell to add/edit information

Event	Date
Expiry Date of Compliance	15/11/2022

Click on the Description cell to add/edit information

Comment	Description
Compliance Receipt Number	VIC0347610

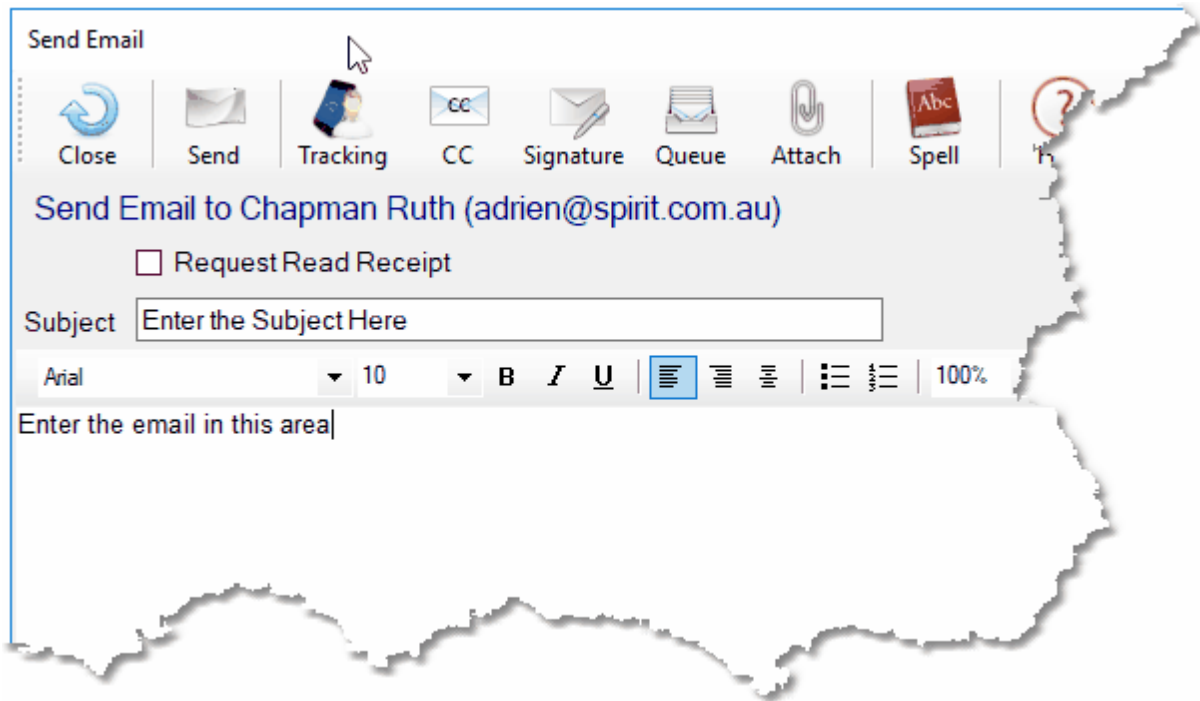
Email 

Press the Email Button opens a pop up window where you can create a quick single email to the selected teacher.

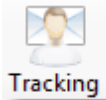


Click on each area of the window shown below to learn more



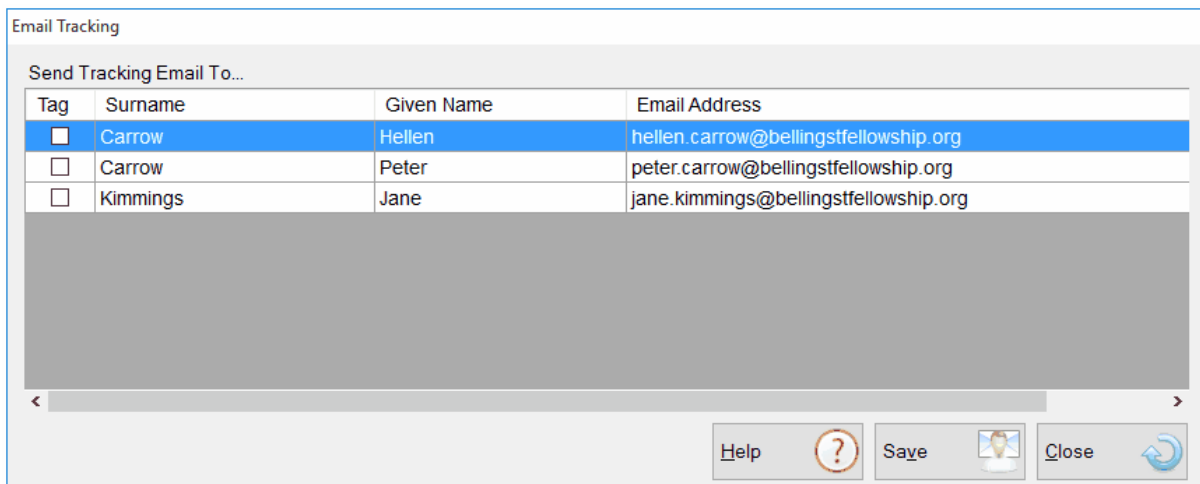


Enter the email Subject here  
 Enter the Body of the email here  
 Select this if want a read receipt to come back.



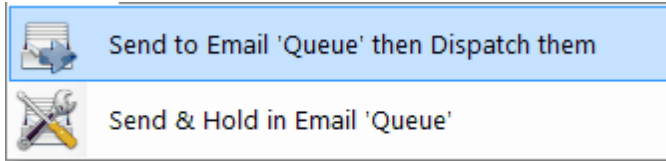
The Tracking Feature lets you select pre-setup email addresses to send a BCC to (Blind Carbon Copy) of the email. The tracking email will tell the recipient who the email was sent to, and what was in the email.

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.



After 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 your email now. Your email will be sent 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 your email to the queue program for sending later.

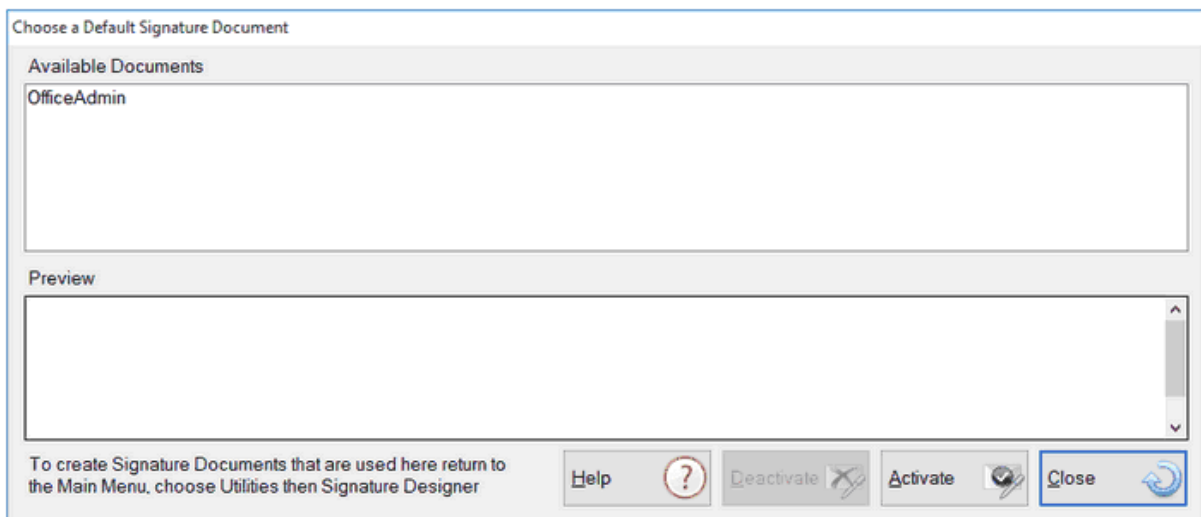


Press this to attach a file to the email before sending.



The Queue Button opens the standard Email Queue program. See [Email Queue](#) for full details.

This window lets you set the DEFAULT signature to use for the current workstation. Simply select the Signature File listed in the top section, and press Activate. Pressing Deactivate will remove the default signature. See [Signature](#) for more information on this



Press this to add a Carbon Copy email send to one or more people.



Click on each area of the window shown below to learn more

CC Email

All Families Only people with a email address will be displayed

Send Carbon Copy of the Email To...

Tag	Surname	Given Name	Email Address
<input type="checkbox"/>	Allwright	Stephen	stephen@spirit.net.au
<input type="checkbox"/>	Allwright	Marion	business email
<input type="checkbox"/>	Angel	Peter	angel@spirit.com.au
<input type="checkbox"/>	Angel	Belinda	angel@spirit.com.au
<input type="checkbox"/>	Anglin	Brent	Brentl@spirit.com.au
<input type="checkbox"/>	Anglin	Katey	Brentl@spirit.com.au
<input type="checkbox"/>	Barton	Ray	ray@spirit.com.au
<input type="checkbox"/>	Barton	Ethel	ray@spirit.com.au
<input type="checkbox"/>	Blackeby	Dot	dot@spirit.com.au
<input type="checkbox"/>	Blackeby	Ernie	ernie@spirit.com.au
<input type="checkbox"/>	Blackeby	Helen	ernie@spirit.com.au
<input type="checkbox"/>	Brown	Peter	peter@spirit.com.au
<input type="checkbox"/>	Brown	Heather	peter@spirit.com.au
<input type="checkbox"/>	Chapman	Adrien	adrien@spirit.com.au
<input type="checkbox"/>	Chapman	Ruth	adrien@spirit.com.au
<input type="checkbox"/>	Collins	Fred	jill@spirit.com.au
<input type="checkbox"/>	Collins	Jill	jill@spirit.com.au

Additional Text to add to Email

Send Email Method  CC  To  Bcc

Help

Choose from any of the mail Pastoral Care groupings to select people from.

- All Families
  - Active Families
  - Privacy Request by Family
  - Active & Privacy Requested
  - Prospect Families
  - Archive Families
  - Main Church
  - Spanish church
  - Home Group 1
  - Home Group 2
  - Home Group 3
  - Home Group 4
- 

Tick to Tag all people in the list, or press the Cross to remove all ticks from the list.


Tick (Tag) those people you want to send a CC to.

Tag	Surname	Given Name	Email Address
<input type="checkbox"/>	Allwright	Stephen	stephen@spirit.net.au
<input type="checkbox"/>	Allwright	Marion	business email
<input type="checkbox"/>	Angel	Peter	angel@spirit.com.au
<input type="checkbox"/>	Angel	Belinda	angel@spirit.com.au
<input type="checkbox"/>	Anglin	Brent	Brentl@spirit.com.au
<input type="checkbox"/>	Anglin	Katey	Brentl@spirit.com.au

Use the Additional Text to add more information JUST to the CC people.  
Choose the method of sending a Copy to.

CC will be a normal Carbon Copy and all people receiving the email will know who received it.  
To will put all names in the To Field and all email addresses will be seen by all  
BCC will send a Blind Carbon Copy where no one will see the other address information.

Send Email Method  CC  To  Bcc







SMS 

Use the SMS Button to send an SMS to the currently selected teacher.  
SMS button from the Create Teacher area lets you send an SMS to that teacher while you are adding them to the Classroom Manager.



Click on each area of the window shown below to learn more

Send SMS \_ □ ×

 Close | 
  Send | 
  Tracking | 
  Queue | 
  Spell | 
  Help

Send SMS to Anglin Katey (041234567890)

Smsglobal Status: Connection Established

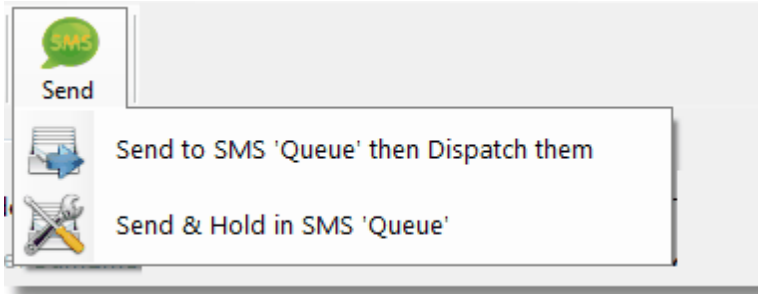
Return ID: 0400123456

Characters: 142    Txt Messages: 1    Cost: \$0.08

Hi Katey, thanks for becoming a Teacher. This message is just to test the SMS feature in Classroom Manager is working with your mobile number.



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

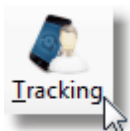
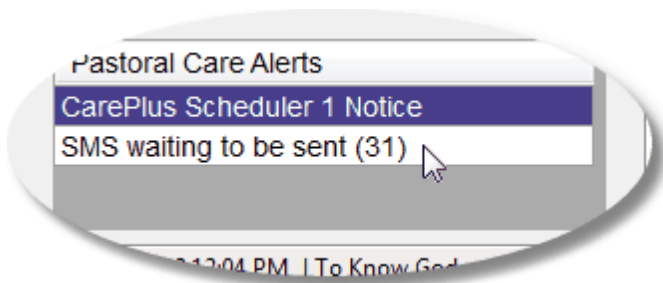


### Send to Queue and Dispatch

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

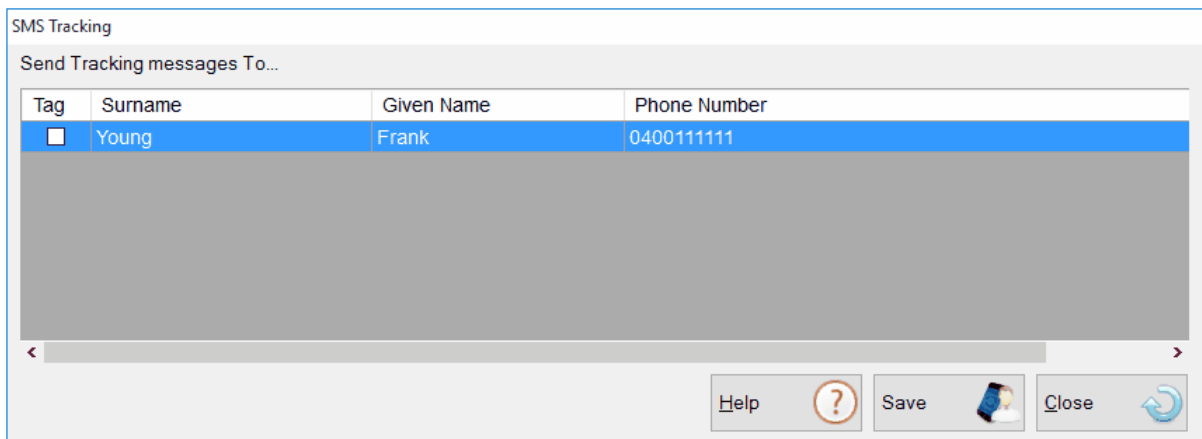
This option sends SMS messages to the [SMS Queue](#) program, and holds the messages to be sent later. If you send using this method, Pastoral Care will place a reminder on the main menu that SMS messages are ready to be sent.



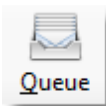
Tracking allows you to enable a blind CC of the messages sent from Pastoral Care. See [SMS Tracking](#) in the Setup area of Pastoral Care for information on setting up Tracking Mobile Numbers. IN the SMS Manager, press Tracking on the toolbar, and tag the people that you want to receive a copy of the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

### Save Settings

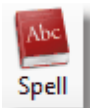
Pressing Save on the bottom of the Tracking Window sets Pastoral Care to save the ticked names here so they are automatically used next time you use SMS messaging.



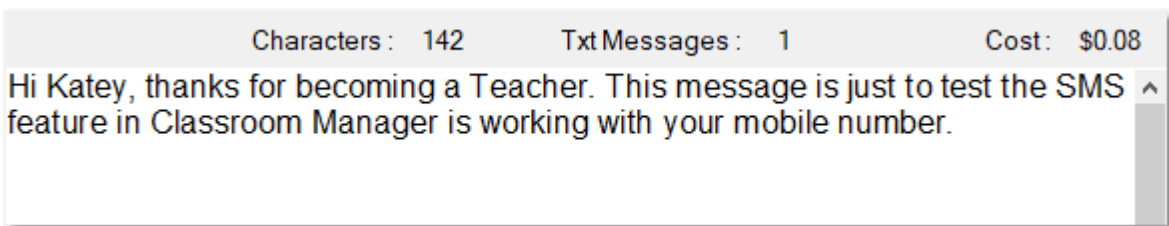
The SMS Queue area is in fact a new program that is automatically controlled from Pastoral Care it'self. It takes SMS messages off Pastoral Care, and sends them on either later (manually) or immediately (automatically).



Pressing the Queue button will open the standard SMS Queue window.

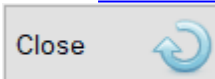


Access the Spell Checker Settings



Compose your SMS here, you can watch the number of characters above this as you type. Press the reload to open this windows FILTER options and reload a new list of teachers to work with.

See the [Filter Teachers](#) area for more information



Press the Close button to exit this area. Any changes you make have been saved.

### Pickup P.I.N

The Manage [Pin Records](#) window lets you see all names and PIN numbers that have been set with a PIN number for access.

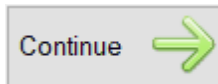
You can set a password to this area by going into Setup from the main menu, and opening the setup area for Classroom Manager.

When you click on Manage - Pickup Pin from the toolbar, the Pickup PIN filters window opens.

## Filters

The PIN Filters window lets you select groups of students to work with based on any of the following options.

Simply select All Pickups to get everyone, or narrow your selection to a Class, Visitors etc.



Press the Continue button to go onto the Main Records window.

**P.I.N. Filters**

**Department**

All Pickups with Students in any Class

All Departments ▼

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ  
 Young Adults

**Load Options**

All Pickups  
 Pickups with Student in Class  
 Pickup Visitors  
 No Students Attached  
 Tag Pickups before Creating Report

**Surname Format**

Use Family Surname  
 Use Individual Surname (if it exists)  
 Show Hidden Individual Surname

**P.I.N. Options**

Only Display Pickups with a P.I.N.

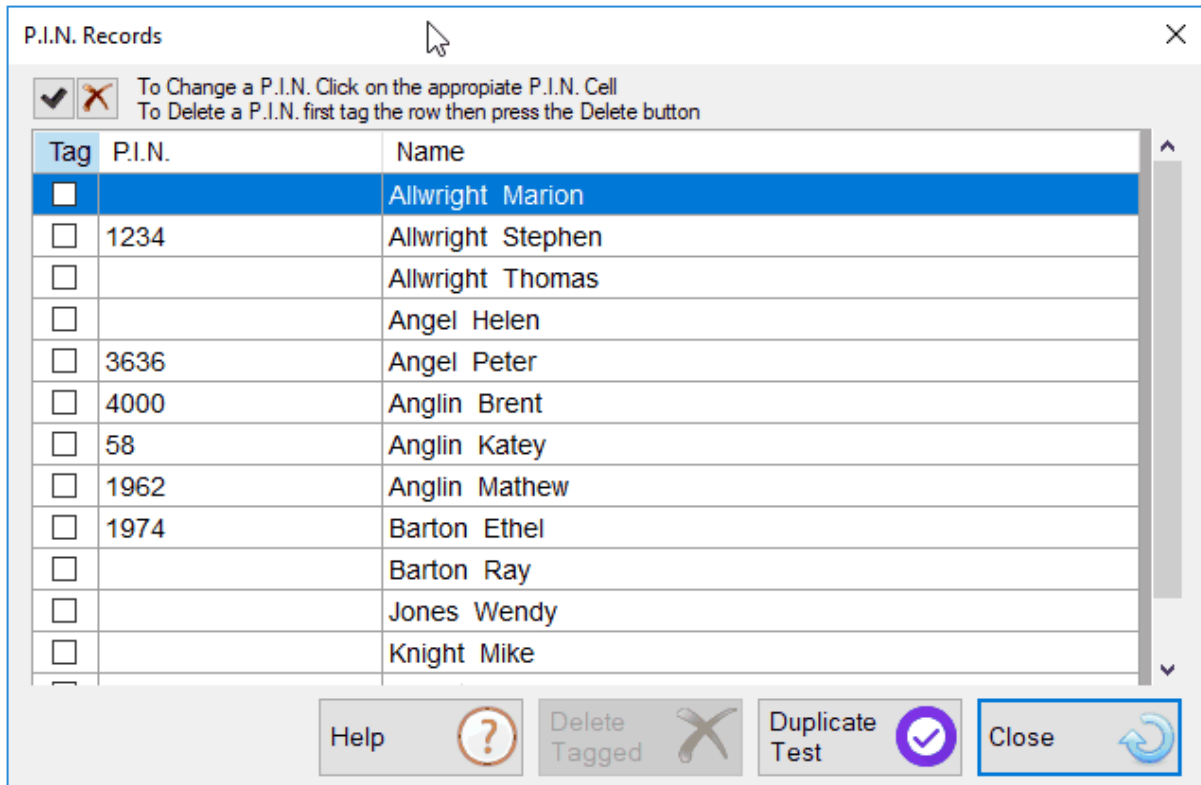
Help 
Cancel 
Continue

## Pin Records

The PIN records window shows the filtered group of pickup people with their PIN number shown if they have one already assigned.



Click on each area of this window to learn more about PIN Records



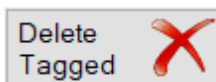
Use the TICK button to TAG all records. Useful if want to delete all pin numbers and start again.



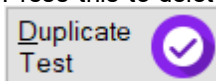
Use the Cross button to UNTAG all selected items in the list.  
From this List, you can edit, add or delete PIN Numbers.

Simply select and type into an existing PIN number to change it or create one. Ticking (Tagging) an item then lets you press the Delete Tagged button to remove a PIN number

Tag	P.I.N.	Name
<input checked="" type="checkbox"/>		Allwright Marion
<input type="checkbox"/>	1234	Allwright Stephen
<input type="checkbox"/>		Allwright Thomas
<input type="checkbox"/>		Angel Helen
<input type="checkbox"/>	3636	Angel Peter
<input type="checkbox"/>	4000	Anglin Brent
<input type="checkbox"/>	58	Anglin Katey
<input type="checkbox"/>	1962	Anglin Mathew

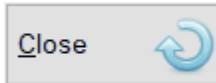


Press this to delete all PIN numbers that have been tagged.



Press this to check if the currently highlighted PIN number has been used before.





Close the PIN Records form. All changes have been saved

### Pickup ID

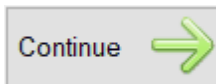
The [Pickup ID Records](#) records window shows the filtered group of pickup people with their Pickup ID shown if they have one already assigned.

A PICKUP ID is a unique Number or Alpha - Number combination that can be used to let people know in Church if a child needs their assistance. This ID could be announced - or Projected onto a screen to get the attention of a person who has a child in a class.

### Filters

The PICKUP ID Filters window lets you select groups of pickups to work with based on any of the following options.

Simply select All Pickups to get everyone, or narrow your selection to a Class, Visitors etc.



Press the Continue button to go onto the Main Pickup ID Records window.

**Pickup ID Filters**

**Department**

All Pickups with Students in any Class

All Departments v

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ  
 Young Adults

**Load Options**

All Pickups  
 Pickups with Student in Class  
 Pickup Visitors  
 No Students Attached

**Surname Format**

Use Family Surname  
 Use Individual Surname (if it exists)  
 Show Hidden Individual Surname

**Pickup Options**

Only Display Pickups with a Pickup ID

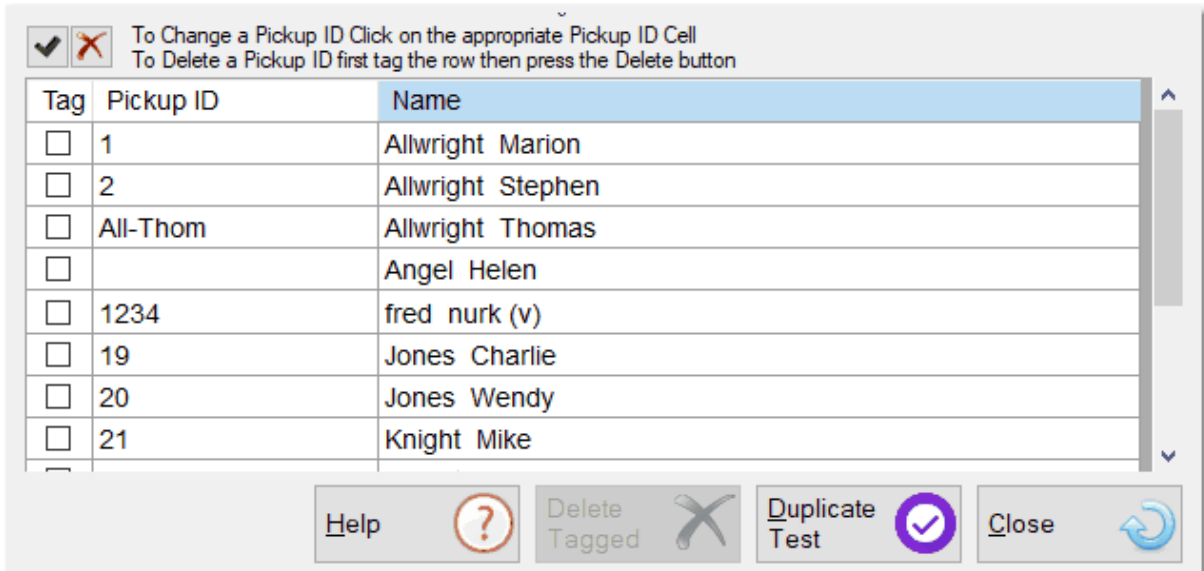
Help ?
Cancel ↶
Continue →

### Pickup ID Records

The Pickup ID records window shows the filtered group of pickup people with their Pickup ID shown if they have one already assigned.



Click on each area of this window to learn more about Pickup ID records



### Tag PIN records



Use the TICK button to TAG all records. Useful if want to delete all Pickup ID's and start again.



Use the Cross button to UNTAG all selected items in the list.

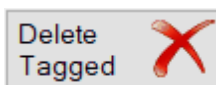
### Pickup ID List

From this List, you can edit, add or delete Pickup ID's.

Simply select and type into an existing Pickup ID to change it or create one. Ticking (Tagging) an item then lets you press the Delete Tagged button to remove a Pickup ID

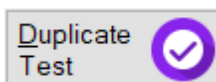
Tag	Pickup ID	Name
<input type="checkbox"/>	1	Allwright Marion
<input type="checkbox"/>	2	Allwright Stephen
<input type="checkbox"/>	All-Thom	Allwright Thomas
<input type="checkbox"/>		Angel Helen
<input type="checkbox"/>	3	Angel Peter
<input type="checkbox"/>	4	Anglin Brent
<input type="checkbox"/>	5	Anglin Katey
<input type="checkbox"/>	6	Anglin Mathew

### Delete Tagged



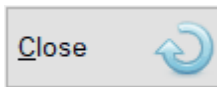
Press this to delete all Pickup ID's that have been tagged.

### Duplicate Test



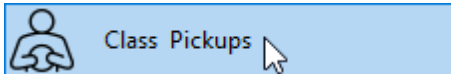
Press this to check if the currently highlighted Pickup ID has been used before.

**Close**



Close the Pickup ID's form. All changes have been saved

**Class Pickups**



The Manage Class Pickups option is an area that lets you define a relationship or link between a Class, a Student and a Pickup Person.



Click on each area of this window to learn more about Class Pickups

Manage Class Pickups

View All Students in Classes

All Departments

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ
- Young Adults

Student

- Allwright Mandy
- Allwright Thomas
- Angel Helen
- Anglin Kerry
- Anglin Levi
- Anglin Mathew
- Barton Ernie
- Barton Karren
- Blackeby Frank
- Blackeby Heather
- Brown John
- Brown Joshua
- Chapman Hannah
- Collins Stephen
- Dean Heather (v)
- Dimsey Dodie
- Dimsey Karren
- Dimsey Mandy
- Dimsey Sarah
- Jones Jill
- Jones Ryan
- Knight Laura
- Knight Mathew
- Knight Michaela
- Knight Rachael
- McCoy David

(v) = Visitor

Pickup Person

- Allwright Marion
- Allwright Stephen
- Angel Peter

Allwright Marion

Add/Change Image Via...

Image Editor  WebCam

Load Image

P.I.N. for Collecting the Student(s)...

Currently NO P.I.N. Set P.I.N.

Help Teachers Build Links Close

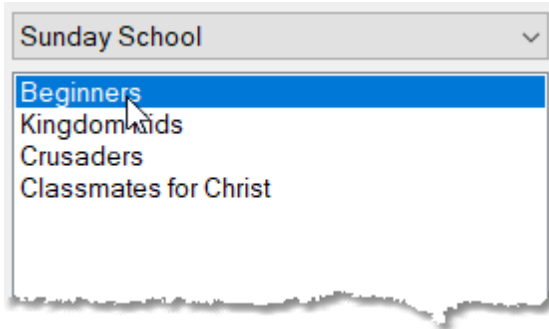
**View All Students In Classes**

View All Students in Classes

Tick this option to see all students in all classes. This is the default for this area.

**Departments**

Select a Department and a Class to filter this form for only one Class. (You will need to untick the [View All Students In Classes](#) option to enable Department and Class filters)



### Student List

This list shows the students in either all classes or in a selected class.



### Add New Pickup

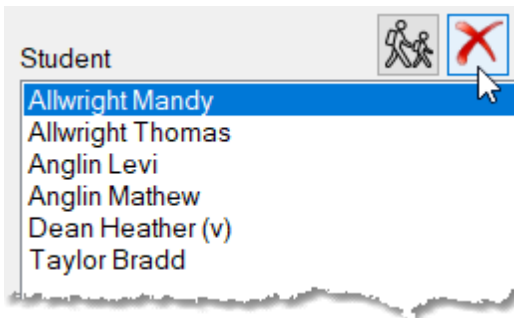


Press the Add New Pickup button to add a new pickup that has not yet been defined. See the [Create a Pickup](#) window for more information.

### Delete Student

After selecting a student (shown below) you can press the Delete Student button to remove that person as a student.

This does not remove any other records of this person throughout Pastoral Care.



### Pickup Properties

After selecting a student (shown below) you can press the Properties button (shown) to change any [Pickup Properties](#)



### Pickup Person

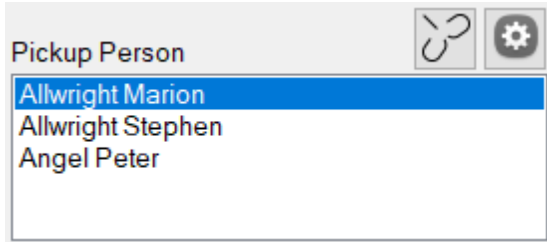
This list shows you the Pickup Person / People assigned to the selected student.



Press the Break Link button to remove the selected pickup person from the list for the currently selected student



Press this to view / alter the [Pickup Properties](#) for the selected pickup person



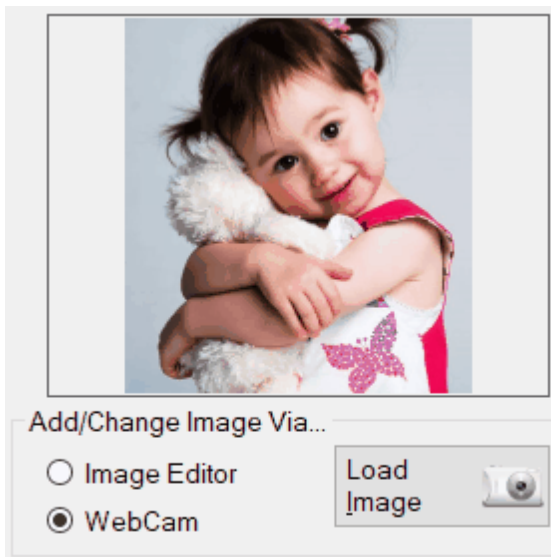
### Display Students Missing a Pickup

Tick this option to quickly locate students setup in Classroom Manager without any Pickup Information set.

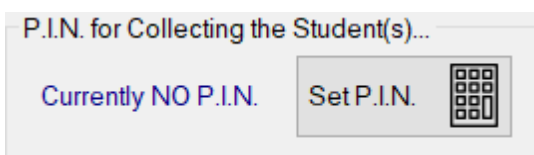
Display Students missing a pickup

### Image Control

This area shows the picture of the selected student, and or lets you add a picture of the student. See [Via Webcam](#) for more information

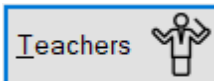


### PIN Collection



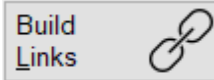
Create a PIN NUMBER for a person to enter into a keyboard when picking up a person.

## Teachers



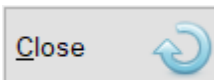
Press this button to load the teachers window. See [Manage Teachers](#) for more information on Teachers.

## Build Links



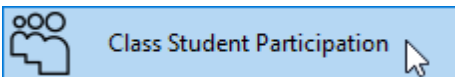
Press this to build the links between the Class - Student and Pickup Person selected on the form.

## Close



Press this button to close the current window.

## Class Student Participation



The Manage Class - Student Participation is an area that lets you define a relationship or link between a Class and a Student.



Click on each area of this window to learn more about Class Student Participation

Manage Class Participation

View All Students in Classes

Sunday School

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

Student

- Allwright Mandy
- Allwright Thomas
- Anglin Levi
- Anglin Mathew
- Dean Heather (v)
- Taylor Bradd

(v) = Visitor

Department

Sunday School

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

Medical Alert

Custody Alert

Child Protection Order in Place

Family Violence Alert

Notes

Has Asthma, see family records for more data

Help ?
Teachers
Build Links
Close

## View All Students in Classes

View All Students in Classes

Tick this option to see all students in all classes. This is the default for this area.

### Student List

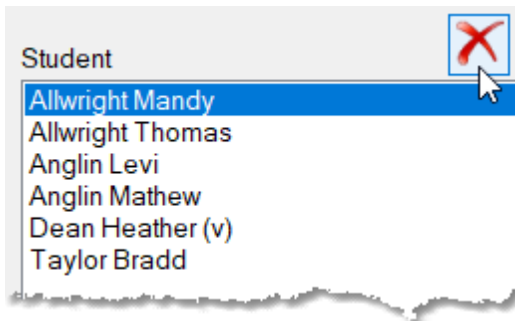
This list shows the students in either all classes or in a selected class.



### Delete Student

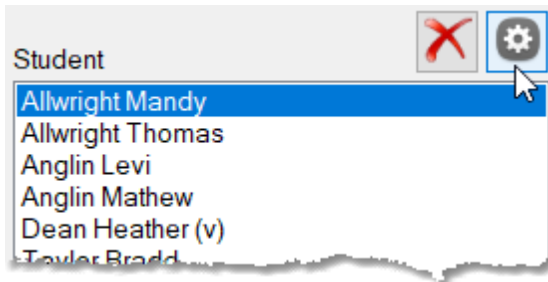
After selecting a student (shown below) you can press the Delete Student button to remove that person as a student.

This does not remove any other records of this person throughout Pastoral Care.



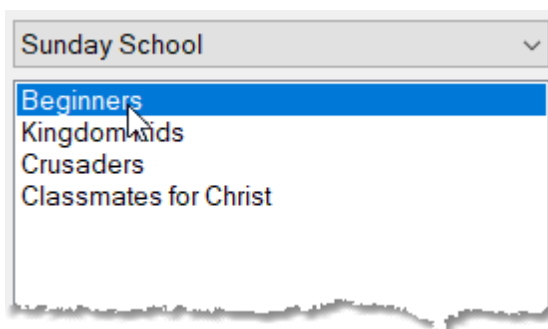
### Student Properties

After selecting a student (shown below) you can press the Properties button (shown) to change any [Student Properties](#)



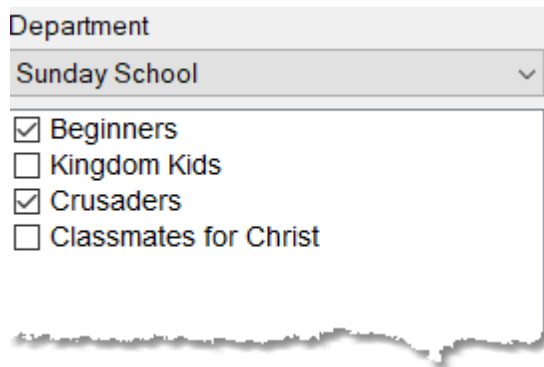
### Department

Select a Department and a Class to filter this form for only one Class. (You will need to untick the [View All Students In Classes](#) option to enable Department and Class filters)



### Student Class

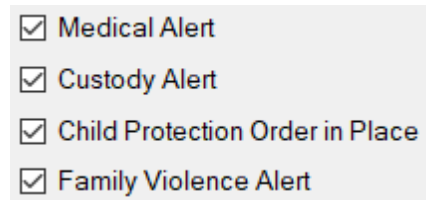
View and also change the Department / Classes that the selected student participates in.



### Alerts

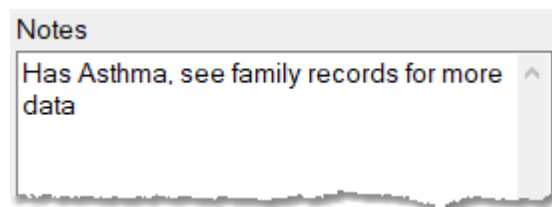
Each student can have any or all of 4 important alerts  
Simply tick any that apply.

Staff are notified of alerts on students at the drop off and pick up events if you are using the Sign In / Sign Out feature.

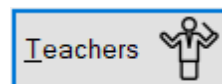


### Notes

Read and or Edit any notes for the selected Student

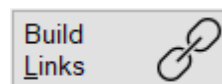


### Teachers



Press this button to load the teachers window. See [Manage Teachers](#) for more information on Teachers.

### Build Links



Press this to build the links between the Class - Student and Pickup Person selected on the form.

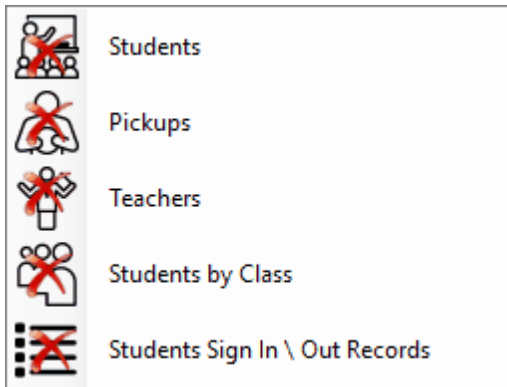
### Delete Data

Use the Delete Data toolbar item to delete information from various areas. These are shown below.



Click on each of the Delete Data menu items to learn more about each function





## Students

When you press the Delete Students option, you are first presented with the [Load Students](#) filter window. Use this to select all or a group of students to work with.

Options on the Delete Window are as follows:



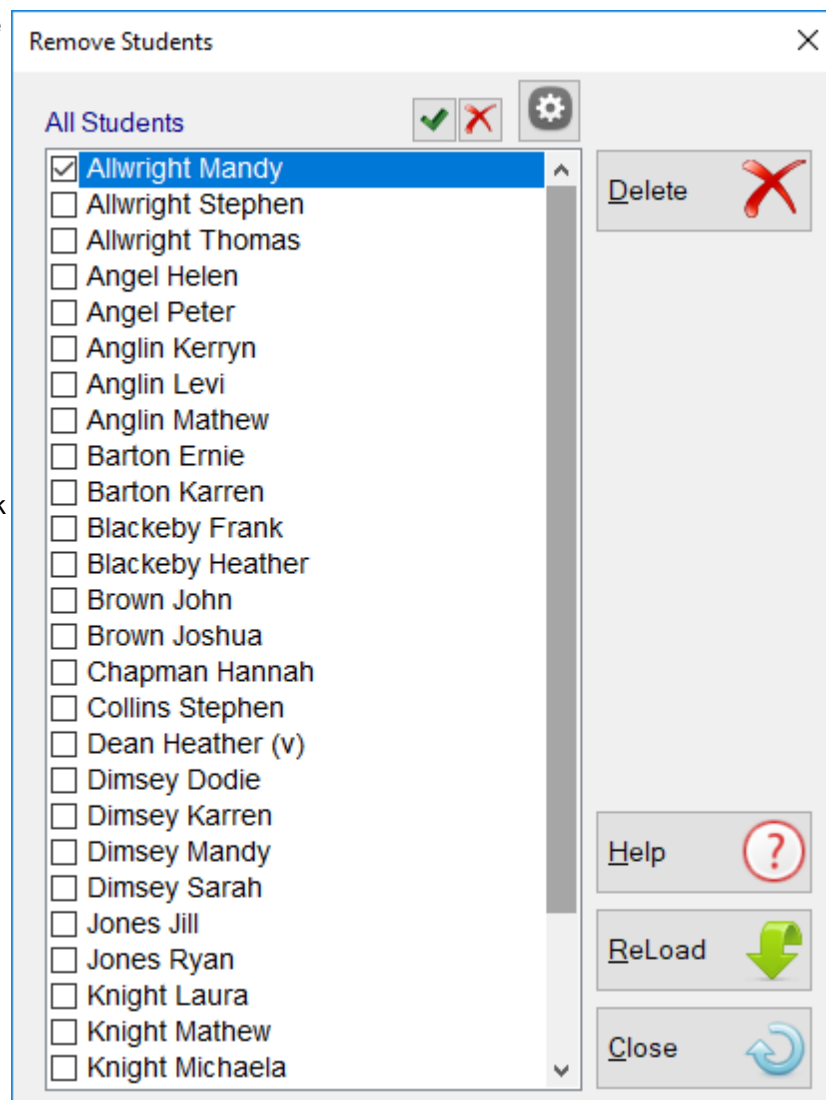
Tick

all or Untick all students



[Pickup Properties](#)

Simply tick the students from this list and press the Delete Button to remove the selected individuals as students.



## Pickups

When you press the Delete Pickups option, you are first presented with a quick filter window where you can select from the below options

**Filter Options**

- All Pickup People
- Has No Pickup Students
- Missing Portrait Image
- Missing a P.I.N.
- Missing Pickup ID
- Missing Mobile Number
- Missing Email Address
- Pickup with No Notes
- Pickup with Notes

Options on the Delete Pickups Window as shown right are as follows:

Remove Pickups
✕

All Pickup People
✓ ✕ ⚙

Allwright Marion  
 Allwright Stephen  
 Allwright Thomas  
 Angel Helen  
 Angel Peter  
 Anglin Brent  
 Anglin Katey  
 Anglin Mathew  
 Barton Ethel  
 Barton Ray  
 Blackeby Heather  
 Blackeby Helen  
 Brown Heather  
 Brown Peter  
 Chapman Adrien  
 Chapman Ruth  
 Collins Fred  
 Collins Jill  
 Dimsey Lorraine  
 Dimsey Richard  
 fred nurk (v)  
 Jones Charlie  
 Jones Wendy  
 Knight Mike  
 Knight Sue  
 McCoy Barbara

Delete ✕

Help ?

ReLoad ↻

Close ↻



Tag all or Untag all Pickups



[Pickup Properties](#)

Simply tick the pickup people from this list and press the Delete Button to remove the selected individuals as pickup people.

## Teachers

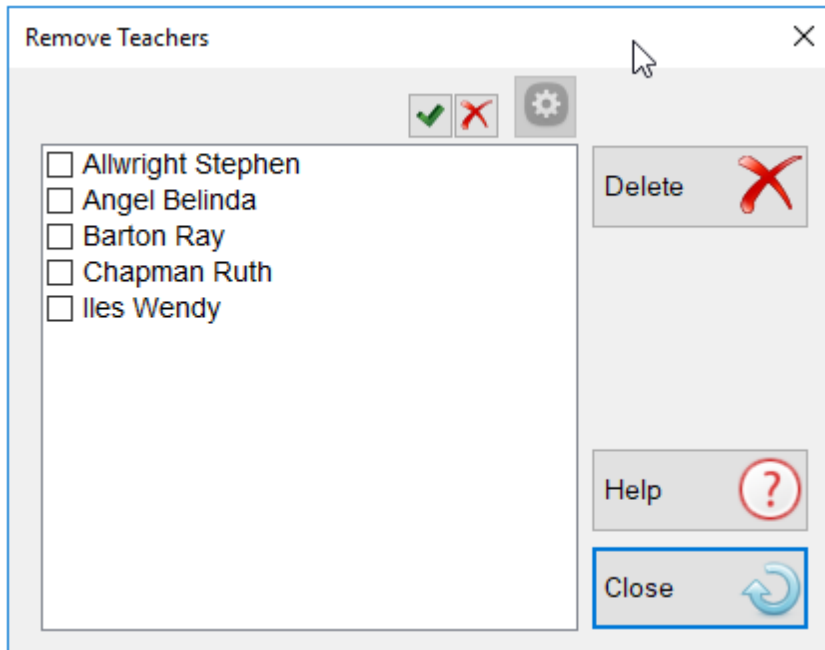
Use this window to delete teachers from the Classroom Manager. Simply tick those that you want to remove from the teachers list, and press the Delete Button.



Tick all or Untick all Teachers



[Teacher Properties](#)



### Students by Class

The Delete Students By Class is designed for quickly removing all students from a class. This does not remove other Pastoral Care Data from the students, just their participation in a class.



Click on each of the Delete Data menu items to learn more about each function

Remove Students by Class

Department: Sunday School

Student List:

- Allwright Mandy
- Allwright Thomas
- Anglin Levi
- Anglin Mathew
- Dean Heather (v)
- Taylor Bradd

(v) = Visitor

Buttons: Help, Delete, Close

Select a Department and a Class to filter this form for a Class.

Sunday School

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

Select one or more students to remove the from the selected class.

Student List:

- Allwright Mandy
- Allwright Thomas
- Anglin Levi
- Anglin Mathew
- Dean Heather (v)
- Taylor Bradd

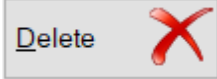


Tag all or Untag all Students

Tick the icon above the students to see the Student Properties for the selected student.



[Student Properties](#)



Press the Delete Button to remove the selected students from the selected Class.

**Students Sign In / Out Records**

Use the Delete Data - Sign In Sign Out records area to delete records of students Signed In and Signed Out.



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

Delete Student Sign In \ Out Records

Delete Record Dates     
  Delete Sign In \ Out Records by Class

Delete Date Option

Delete a Specific Date

Dates Attached to: All Available Dates

06/01/2019

08/09/2018

Delete a Date Range

To:

Delete All Dates

Department

Sunday School

Delete from All Classes

Beginners

Kingdom Kids

Crusaders

Classmates for Christ

Help ?

Delete X

Close ↻

**Classroom Manager Sign In / Sign Out**

After having setup the Classroom Manager, and put students & teachers into classes, you can use the Sign In / Sign Out area to record the fact that students have signed in and out or have been signed in and out of an event / class.

It is worth thinking about what this will enable for your church, and also what cost of time and effort will

need to be invested in utilising this feature to its optimum usage.

When you select the Sign In / Sign Out option on the [Classroom Manager Toolbar](#), a pre load form opens ([Sign In / Sign Out Load Options](#)) up letting you select filters and options to load your Sign In / Sign Out event ready for data entry.

See also [Sign In / Sign Out Main Window](#) for more information.

### Sign In / Sign Out Load Options

Shown below is the Sign In / Sign Out Load Options window.

If you are going to be doing Sign In & Out for for one department, or only 1 or 2 classes, then use this form to limit who you are loading. This way your Sign In / Sign Out window will only have the students and pickup people you are interested in.



Click on each part of this window to learn more about the pre-load area for Sign In / Sign Out

**Sign In \ Out Load Options**

**Student Class Load Options**

All  
  Not Signed In  
  Not Signed Out

**Sign In \ Out Date**

Add New Date  
 View / Alter Existing Date

Saturday .27 April 2019

Dates Attached to: All Departments

06/01/2019

08/09/2018

**Image Options**

Load Image  
 Small  
  Medium  
  Large

**Department**

Sunday School

Load All Students in Classes

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

**Surname Format**

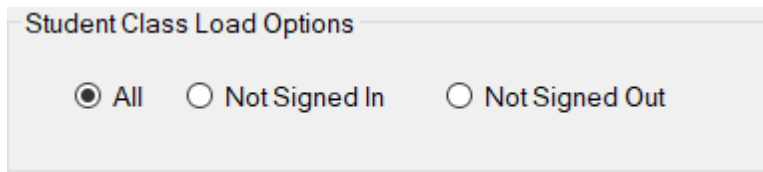
Use Family Surname  
 Use Individual Surname (if it exists)  
 Show Hidden Individual Surname

**Ordered By...**

Class  
  Name

**Student Class Load Options**

Choose to load in all students, on those NOT signed in, or NOT signed out

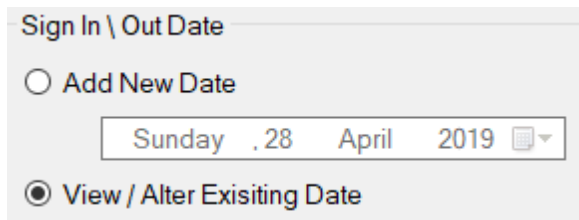


Student Class Load Options

All    Not Signed In    Not Signed Out

**Sign In / Out Date**

Choose to either Add a New Date (New Sign In / Sign Out event) or to View / Alter an existing Date (record)



Sign In \ Out Date

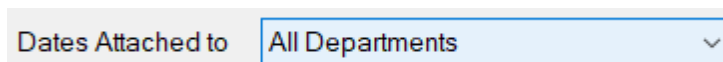
Add New Date

Sunday .28 April 2019

View / Alter Existing Date

**Dates Attached To**

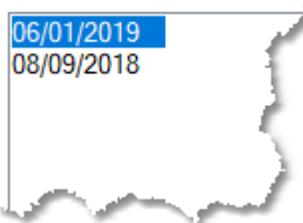
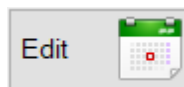
Use this to choose to see all the dates across all departments, or select a single department to view dates that have data saved against them.



Dates Attached to All Departments

**Date List**

The Date List shows all dates for the selected [Dates Attached To](#) filter.

**Edit Date**

After selecting a Date, you can press this button to CHANGE the date of the records.

**Delete Date**

After selecting a Date, you can press this to DELETE the date from the list.

WARNING - This will remove all records in the Classroom Manager associated with that date.

**Image Options**

If you are using Images for Students, Pickup People and Teachers, then when loading in a Sign In / Sign Out event, you can choose to load in images with 3 different sizes.

**Image Options**

Load Image

Small  Medium  Large

### Department

Use this section to select either All Departments, or an Individual Department, all classes, or selected classes etc.





Use the TICK button to TAG all Classes



Use the Cross button to UNTAG all Classes

**Department**

Sunday School

Load All Students in Classes  

Beginners

Kingdom Kids

Crusaders

Classmates for Christ

### Surname Format

When loading people into the Classroom Manager, you can select to use either the Family Surname, or use the Individual Surname if one exists.

**Surname Format**

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

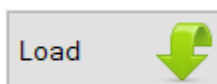
### Ordered By

Set the order for the Sign In / Sign Out form to be either By Class or By Name

**Ordered By...**

Class  Name

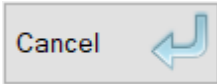
### Load



Press this to complete the Sign In / Sign Out load process.



**Cancel**



Press this to cancel the Sign In / Sign Out load process.

**Sign In / Sign Out Overview**

Once you have loaded the [Sign In / Sign Out Main Window](#) using the [Sign In / Sign Out Load Options](#) all selected data is loaded for you to manage the process from one screen.

This screen is called the [Sign In / Sign Out Main Window](#) and this is the area where you physically do the Sign In / Sign Out procedure.

**Using Sign In / Sign out on a network.**

Some larger churches may want to use this system at different Check In Points. One computer for one group of classes, and another computer for other groups of classes etc. As long as you are all connected to a network, and using Pastoral Care in networking mode, then you are able to have one computer create a date in the sign in / sign out area, and then everyone can edit that record for each class / department they are working in.

See [Setup Network Configuration](#) for more information on using a network.

**Sign In / Sign Out Main Window**

Below is the Sign In / Sign Out window with some data loaded.



**Click on each area of this window for more information on how this feature works.**

Class \ Name	Alerts	Time In	Time Out	Portrait	Drop Off Person	Pickup Person
Beginners \ Allwright Mandy	Medical Alert Custody Alert Child Protection Order Family Violence Alert	9:00 AM	10:30 AM		Stephen Allwright	Stephen Allwright
Beginners \ Allwright Thomas	Custody Alert	9:00 AM	10:30 AM		Thomas Allwright	Thomas Allwright
Beginners \ Anglin Levi	Custody Alert	9:00 AM	10:30 AM			
Beginners \ Anglin Mathew					Mary Nurk	
Beginners \ Dean Heather (v)						
Beginners \ Taylor Bradd						
Kingdom Kids \ Allwright Thomas	Custody Alert					
Kingdom Kids \ Angel Helen	Child Protection Order					
Kingdom Kids \ Blackeby Frank		9:00 AM	10:30 AM			

## Sign In / Out Tool Bar

Shown below is the Sign In / Sign Out Tool Bar.



Click on each area of this window for more information on how this feature works.



Close

Press the Close button to exit the Sign In / Sign Out Area.



Load

The Load Icon on the toolbar opens up the [Sign In / Sign Out Load Options](#) where you can select a new range of filters to reload your form.



Save

Press the Save button to save any data entered in the Sign In / Sign Out form.



New

Press the New button to create a new item during a sign in / sign out event. Items that can be created from here are the same as on the [Classroom Manager New](#) button on the main window of Class Room Manager.

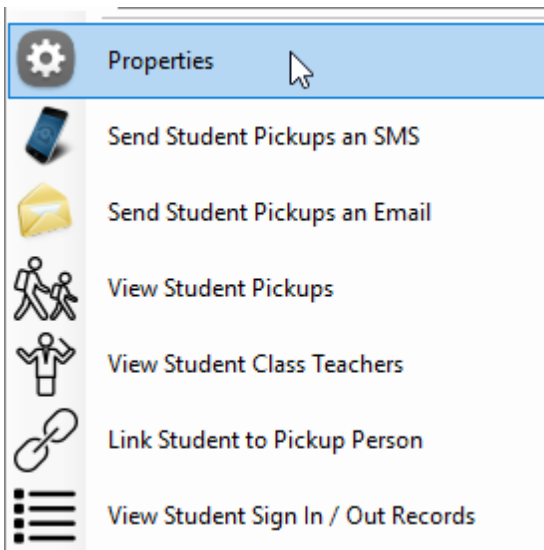


Student

Pressing the Student button on the Sign In / Sign Out toolbar opens the following menu. From here you can manage sending messages to students, student properties and more.



Click on each item below for more information on each feature.



This opens the standard [Student Properties](#) for the currently selected student.




Send Student Pickups an SMS


Use this option to send an SMS to the currently selected students Pickup Person





Click on each area of this window for more information on how this feature works.


Send SMS
✕


  
Close

  
Send

  
Tracking

  
Queue

  
Spell

  
Help

Send SMS to Mathew Anglin Pickups

Pickup Person ⚙️

Anglin Brent

Anglin Katey

Nurk Mary (v)

Mobile Number Use Alternative Mobile

Brent Anglin Personal Mobile (041234567890)
▼

Smsglobal Status

Connection Established

Return ID

0400123456

Characters : 34      Txt Messages : 1      Cost : \$0.08

Enter the SMS Message here to send|

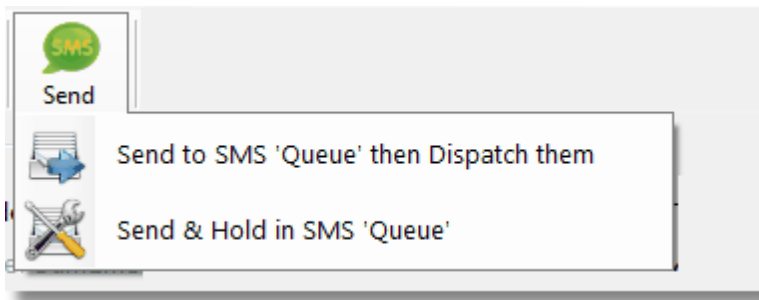
Send

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

Chapter 7

Church Tab - Class Room Manager

691

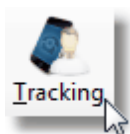
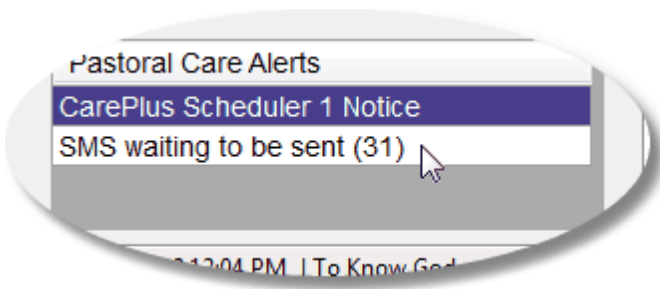


### Send to Queue and Dispatch

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

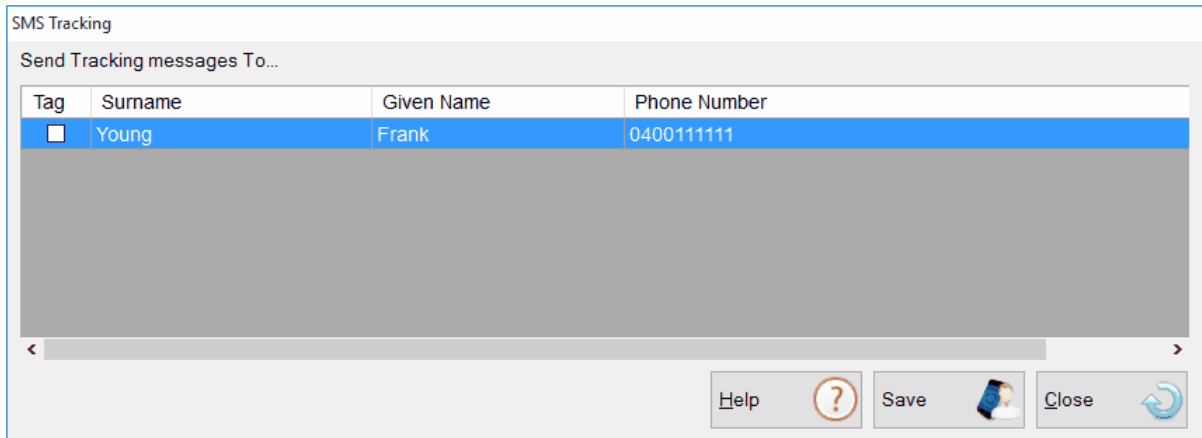
This option sends SMS messages to the [SMS Queue](#) program, and holds the messages to be sent later. If you send using this method, Pastoral Care will place a reminder on the main menu that SMS messages are ready to be sent.



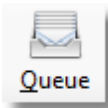
Tracking allows you to enable a blind CC of the messages sent from Pastoral Care. See [SMS Tracking](#) in the Setup area of Pastoral Care for information on setting up Tracking Mobile Numbers. IN the SMS Manager, press Tracking on the toolbar, and tag the people that you want to receive a copy of the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

### Save Settings

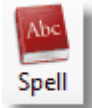
Pressing Save on the bottom of the Tracking Window sets Pastoral Care to save the ticked names here so they are automatically used next time you use SMS messaging.



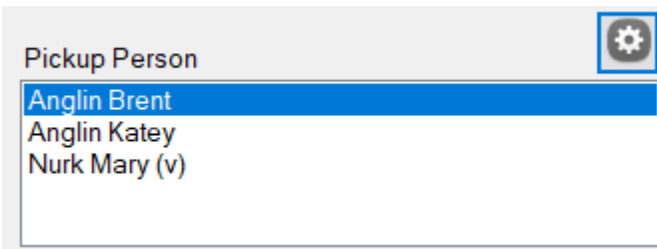
The SMS Queue area is in fact a new program that is automatically controlled from Pastoral Care it's self. It takes SMS messages off Pastoral Care, and sends them on either later (manually) or immediately (automatically).



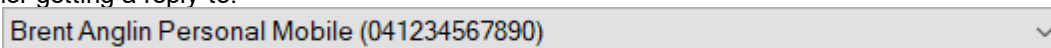
Pressing the Queue button will open the standard [SMS Queue](#) window.



Access the Spell Checker Settings



Select the pickup person you want to send an SMS to  
If you are sending a message to a pickup person, you can enter the mobile phone that you have with you for getting a reply to.



Select a mobile from family members that are available to select from.



You can also manually enter an alternative mobile number using the "Use Alternative Mobile" option.


Your child needs help going to the toilet. Please attend  
Sunday School Foyer asap|


Compose your SMS here, you can watch the number of characters above this as you type.  
Use this option to send an email to a pickup person.





Click on each area of this window for more information on how this feature works.


Send Email
✕


  
Close


  
Send


  
Tracking


  
CC

  
Signature

  
Queue

  
Attach

  
Spell

  
Help

Send Email to Mathew Anglin Pickups

Pickup Person ⚙️

Anglin Brent

Anglin Katey







Nurk Mary (v)

Use Alternative Email

Contact Email

Family Email (Brentl@spirit.com.au) ▾

Subject  Request Read Receipt

Arial    ▾ 10    ▾    **B**    *I*    U    |                |            |    100%    ▾    

Enter the email Subject here

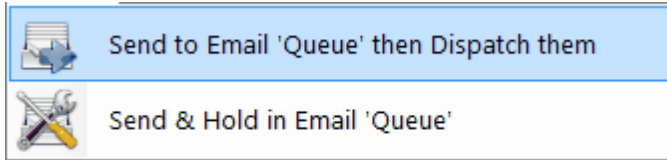
Enter the Body of the email here

**Request Read Receipt**  Select this if want a read receipt to come back.



After 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.

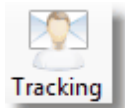


### Send and Dispatch

Send and Dispatch your email now. Your email will be sent to the Email Queue program. This program will run in the background and send the emails off without interrupting the use of the computer.

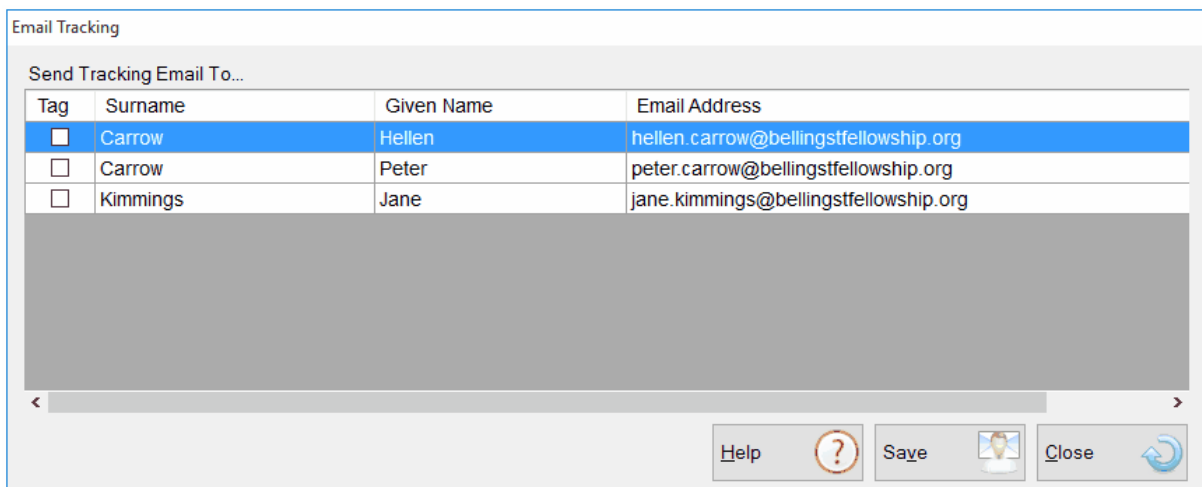
### Send and Hold

This option sends your email to the queue program for sending later.



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.



Press this to add a Carbon Copy email send to one or more people.



Click on each area of the window shown below to learn more

CC Email

All Families Only people with a email address will be displayed

Send Carbon Copy of the Email To...

Tag	Surname	Given Name	Email Address
<input type="checkbox"/>	Allwright	Stephen	stephen@spirit.net.au
<input type="checkbox"/>	Allwright	Marion	business email
<input type="checkbox"/>	Angel	Peter	angel@spirit.com.au
<input type="checkbox"/>	Angel	Belinda	angel@spirit.com.au
<input type="checkbox"/>	Anglin	Brent	Brentl@spirit.com.au
<input type="checkbox"/>	Anglin	Katey	Brentl@spirit.com.au
<input type="checkbox"/>	Barton	Ray	ray@spirit.com.au
<input type="checkbox"/>	Barton	Ethel	ray@spirit.com.au
<input type="checkbox"/>	Blackeby	Dot	dot@spirit.com.au
<input type="checkbox"/>	Blackeby	Ernie	ernie@spirit.com.au
<input type="checkbox"/>	Blackeby	Helen	ernie@spirit.com.au
<input type="checkbox"/>	Brown	Peter	peter@spirit.com.au
<input type="checkbox"/>	Brown	Heather	peter@spirit.com.au
<input type="checkbox"/>	Chapman	Adrien	adrien@spirit.com.au
<input type="checkbox"/>	Chapman	Ruth	adrien@spirit.com.au
<input type="checkbox"/>	Collins	Fred	jill@spirit.com.au
<input type="checkbox"/>	Collins	Jill	jill@spirit.com.au

Additional Text to add to Email

Send Email Method  CC  To  Bcc

Help

Choose from any of the mail Pastoral Care groupings to select people from.

All Families

- Active Families
- Privacy Request by Family
- Active & Privacy Requested
- Prospect Families
- Archive Families
- Main Church
- Spanish church
- Home Group 1
- Home Group 2
- Home Group 3
- Home Group 4

Tick to Tag all people in the list, or press the Cross to remove all ticks from the list.



Tick (Tag) those people you want to send a CC to.

Tag	Surname	Given Name	Email Address
<input type="checkbox"/>	Allwright	Stephen	stephen@spirit.net.au
<input type="checkbox"/>	Allwright	Marion	business email
<input type="checkbox"/>	Angel	Peter	angel@spirit.com.au
<input type="checkbox"/>	Angel	Belinda	angel@spirit.com.au
<input type="checkbox"/>	Anglin	Brent	Brentl@spirit.com.au
<input type="checkbox"/>	Anglin	Katey	Brentl@spirit.com.au

Use the Additional Text to add more information JUST to the CC people.  
Choose the method of sending a Copy to.

CC will be a normal Carbon Copy and all people receiving the email will know who received it.  
To will put all names in the To Field and all email addresses will be seen by all  
BCC will send a Blind Carbon Copy where no one will see the other address information.

Send Email Method  CC  To  Bcc

This window lets you set the DEFAULT signature to use for the current workstation. Simply select the Signature File listed in the top section, and press Activate. Pressing Deactivate will remove the default signature. See [Signature](#) for more information on this

Choose a Default Signature Document

Available Documents

OfficeAdmin

Preview

To create Signature Documents that are used here return to the Main Menu, choose Utilities then Signature Designer



The Queue Button opens the standard Email Queue program. See [Email Queue](#) for full details.



Press this to attach a file to the email before sending.  
Select the Pickup person you want to send an email to. The available email addresses will be able to be selected then in the [Contact Email](#) selection box.

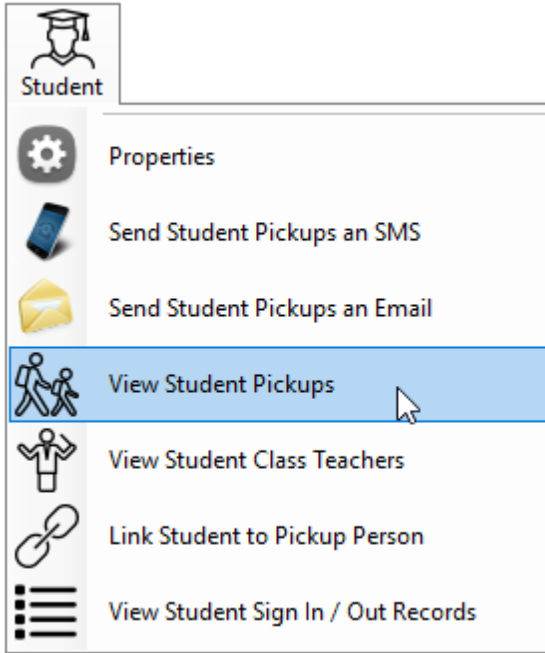
Use Alternative Email

Tick this option to manually enter an email address to send an email to.

Contact Email

Family Email (Brentl@spirit.com.au) ▾

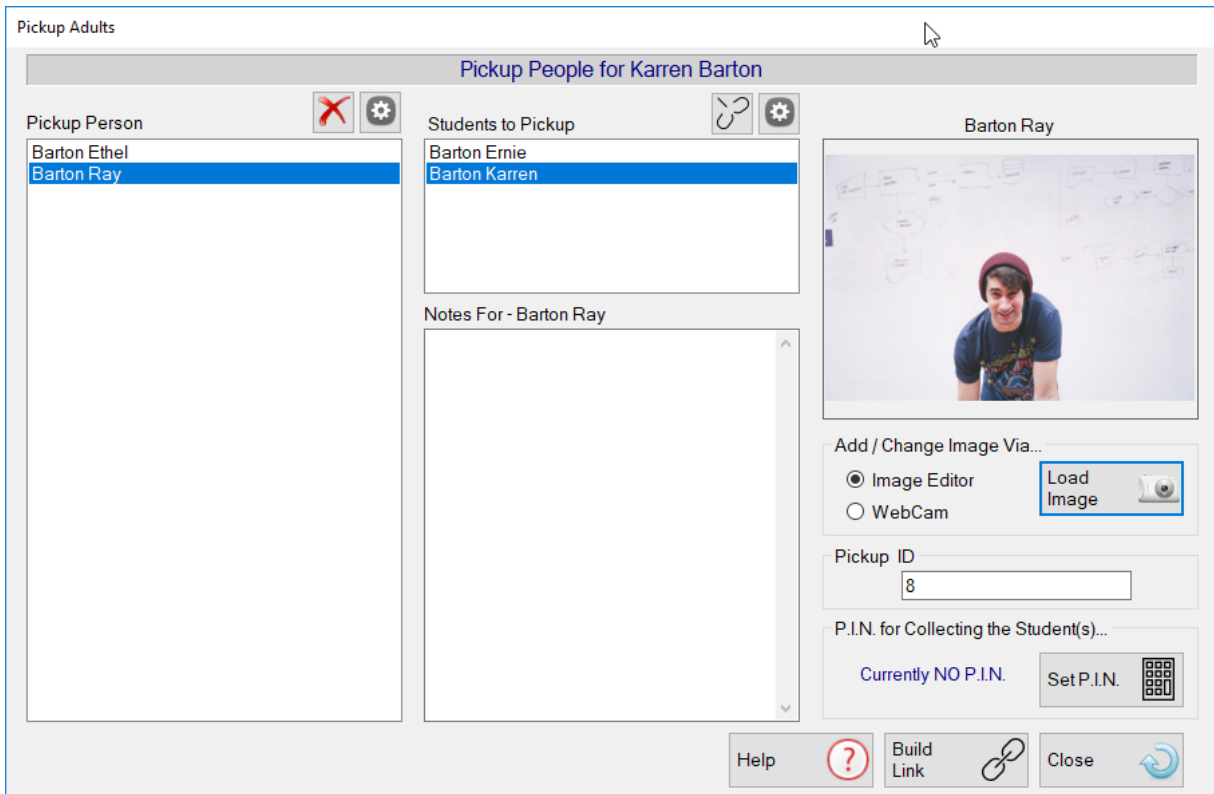
Select an email address to send the email to.



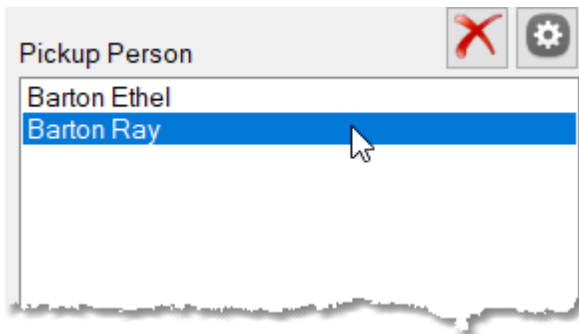
Pressing the View Student Pickups option from the Student Icon on the [Sign In / Sign Out Main Window](#) opens up the following window where you can see all the pickup people for the selected student and make any changes to the pickups are well.



Click on each area of this window below for more information on how this feature works.



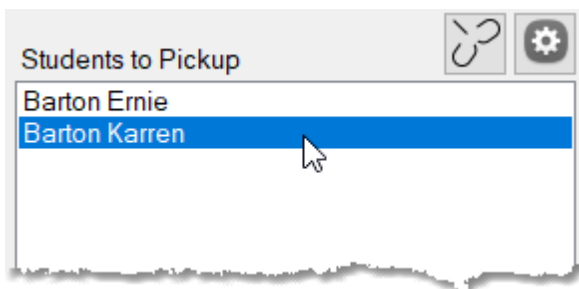
Select a Pickup Person that has been assigned to the selected Student. Once selected you can change a number of settings for this person. Just above this list there are options to [Delete Pickup](#) or to set some [Pickup Properties](#)



Pressing this will delete the selected Pickup Person as a pickup for the selected student.



Pressing this will display the [Pickup Properties](#) for the selected pickup person. This list shows any students linked to the selected Pickup Person. In this list will be at least the selected student you have selected on the previous window. The icons above this list have options to [Break Link](#) for the selected Student / Pickup Person, and also a link to the [Student Properties](#) window



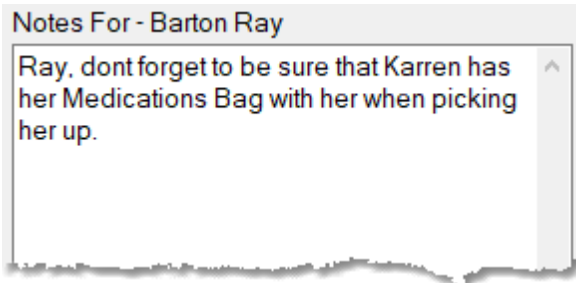


Break the link between the selected Pickup Person and the selected Student.



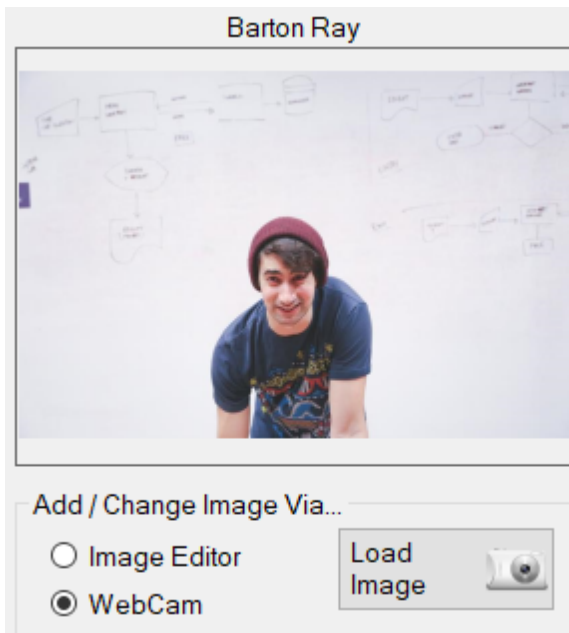
Open the standard [Student Properties](#) window for the selected student.

Enter any notes for the current pickup person when picking up the selected student.



If an image has been saved for the pickup person, it will be shown in this area. Use the Add / Change Image options to add or change an image for a pickup person.

See [Via Webcam](#) for information on capturing an image from a web cam.

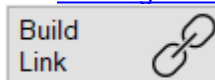


This is the unique PICKUP ID for the selected Student

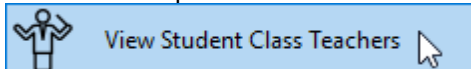


The PIN number can be set here by pressing the Set PIN button.

See [Entering a PIN NUMBER](#) for more information.



Pressing this button will save and confirm the Pickup Links between the selected Pickup Person and Students selected on the window.

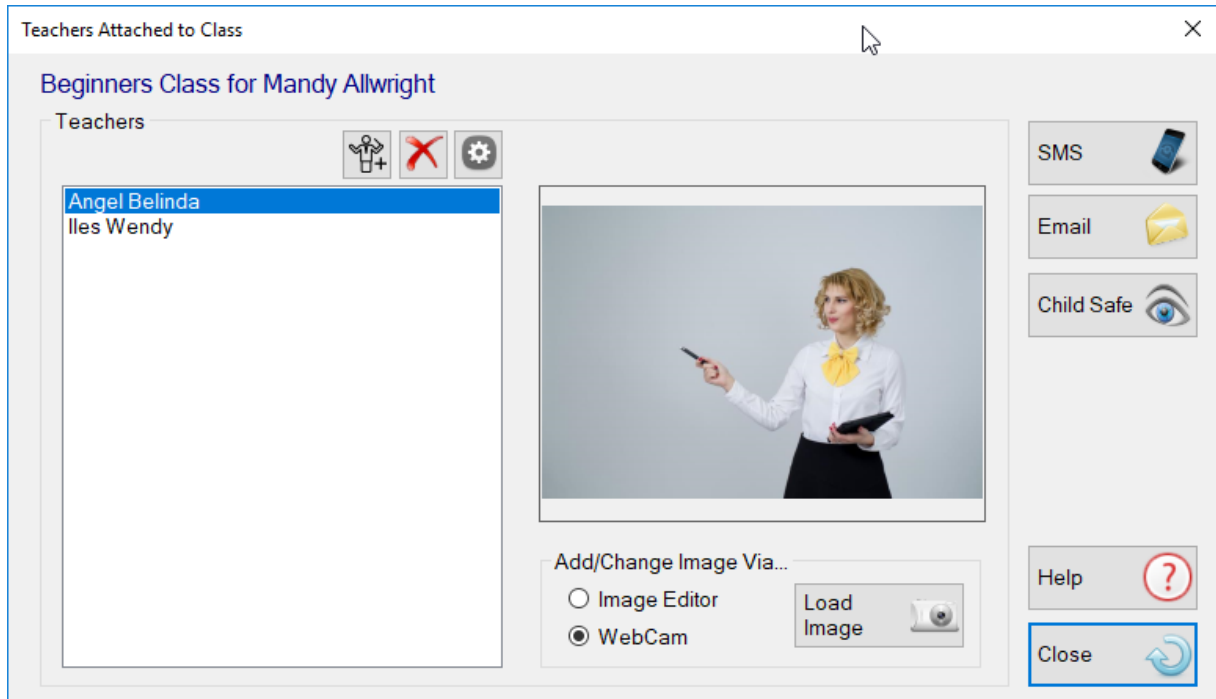


Selecting the View Student Class Teacher option from the Sign In / Sign Out Student button loads the following screen.

This screen shows Teachers attached to the class that the selected student is in.



Click on each area of this window below for more information on how this feature works.



This list shows the teachers available / assigned to teach the class of the selected student.

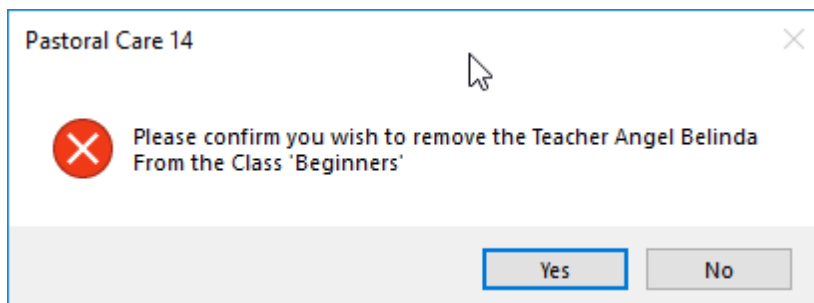


Press this button to create a new Teacher. See [Create a Teacher](#) for details on how to create a teacher.



Press this button to delete the current teacher. This does not remove any family file records, it just removes a person as a teacher.

You are warned of what you are about to do with a message that looks like the following confirmation message:

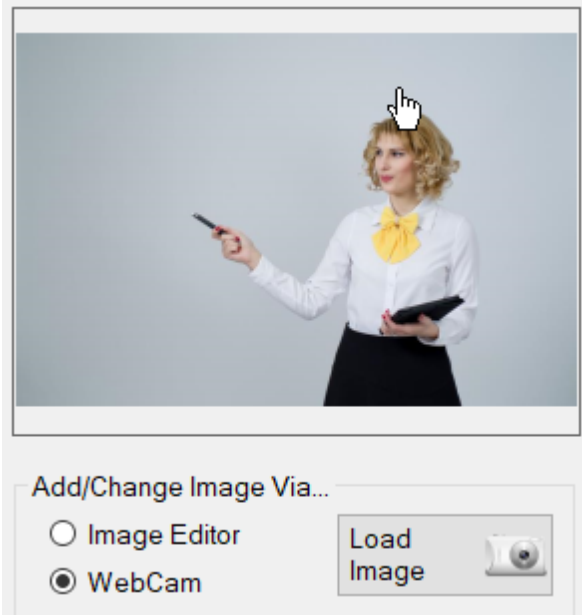




Press this to view the properties of the currently selected teacher. See [Teacher Properties](#) for more information.

This area shows the picture of the selected teacher, and lets you add or change the picture of the teacher.

See [Via Webcam](#) for more information



SMS



this feature.

Send an SMS to the selected teacher. See [Send SMS](#) for more information on

Email



information on this feature.

This button lets you send an email to the teacher. Click [Email](#) for more

information on this feature. View the Child Safe records for the selected teacher. Only people with a password into Child Safe will be able to view this information. See [Child Safe](#) for more details.

Close



Close this window.



Link Student to Pickup Person

The Link Student to Pickup Person lets you create a permanent link between a student and a pickup person. This is ideal for regular pickups as the pickup person is always available as the preferred pickup.

See the [Add New Pickup](#) for information on adding a

This option lets to see the Sign In and Sign Out records for the selected student. When this is pressed a [Load](#) window is opened letting you select the date ranges and classes to load.

For the most accurate load, go with the defaults of All Dates - All Classes. This will find any sign in and out records for the selected student.

Once the LOAD button is pressed, the [View Student Sign In / Out Records](#) is shown with the data selected.

Shown below is the Load Screen to load in Sign In / Sign Out records to view.



Click on each area of this window for more information on how this feature works.

View All Dates  
 View a Specific Date

Select to View data from All Dates (All available data) or view a Specific

(Selected) date

Tick the View All Classes to grab all sign in records for all classes, or untick this option to manually select a Department and Class combination.

Select the View a Date Range option to let you filter between a range of dates.

View a Date Range

Sunday .12 May 2019

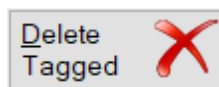
To Sunday .12 May 2019

Order the results loaded by either Class or Date / Time Signed in.

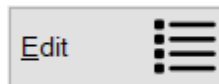
Order By

Class  Date \ Time In

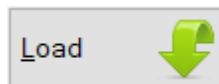
Press the Load Button to load in the Student Sign in / Sign Out records  
This window shows you the Sign In / Sign Out records for the selected [Load](#) options.



Tick (Tag) records and press this button to delete them



Press this to edit the selected / highlighted record



Press this to reload the form with new criteria. (See [Load](#)) for more information

Student Records

Student Details for Mandy Allwright

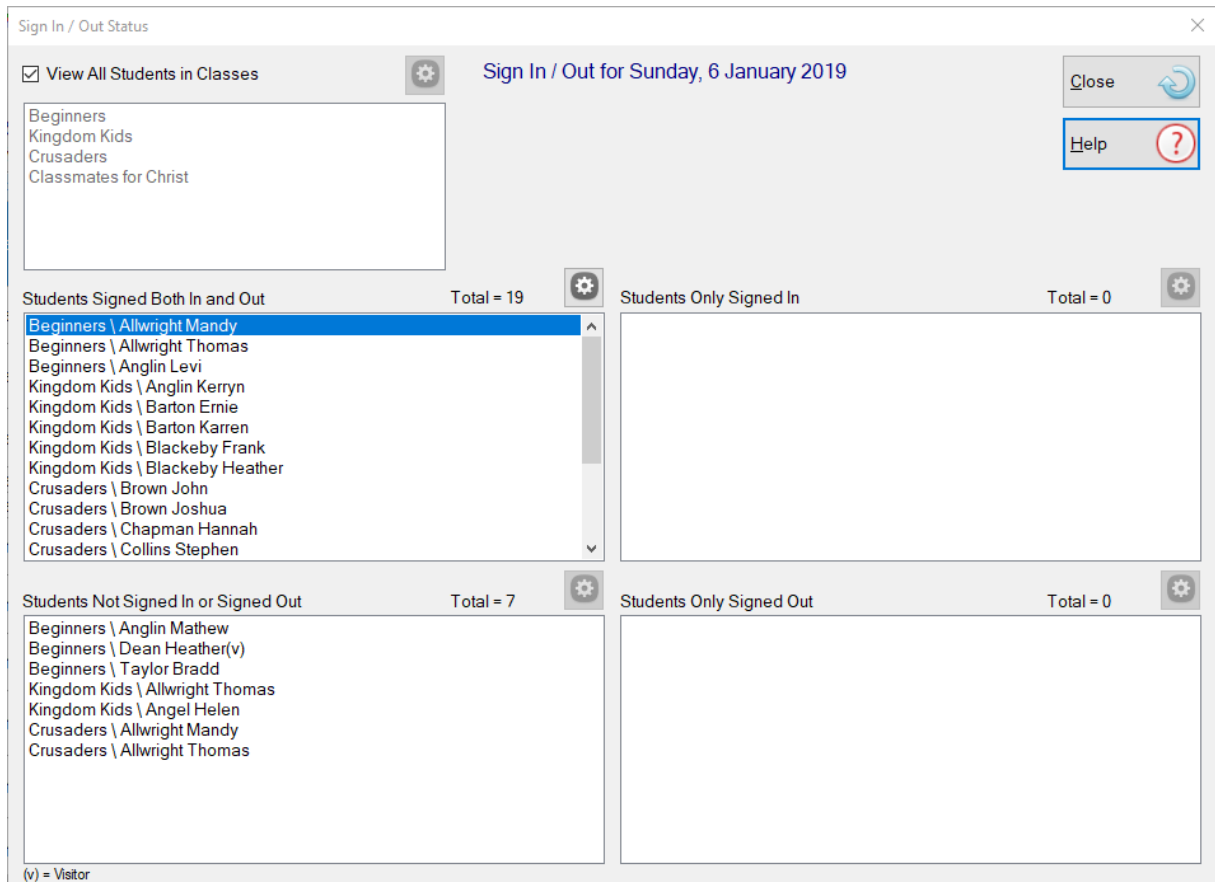
Tag	Class	Date	Time In	Time Out	Drop Off Person
<input checked="" type="checkbox"/>	Beginners	06/01/2019	9:00 AM	10:30 AM	Stephen Allwright

Help ? Delete Tagged X Edit Load Close



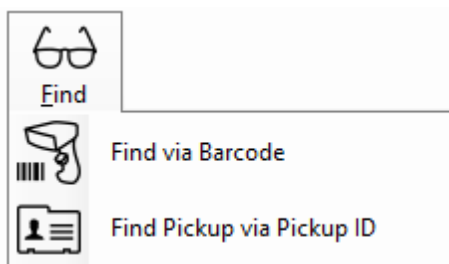
The Status button on the Sign In / Sign Out toolbar shows the following window. Each of the 4 panels shows the status of students in one of 4 categories. A description of each category is above that list of students.





The Find item on the Sign In / Sign Out toolbar help you locate a pickup by one of two methods:

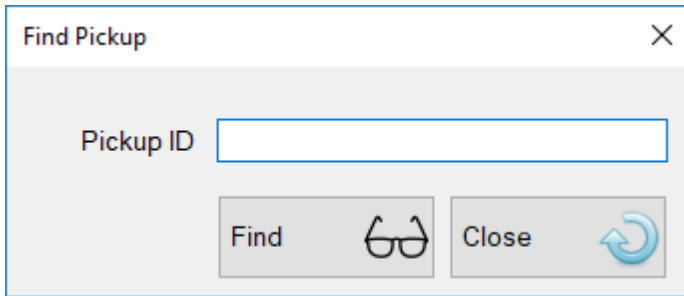
[Find Pickup By Barcode](#) - [Find Pickup By Pickup Id](#)



In the Classroom Manager [Classroom Reports](#) area, you have many options to print out a Bar Code list of pickup people, in a number of formats. Even name tags that can be scanned.

Finding a pickup by barcode is as simple as selecting the Find - Find By Barcode from the Sign In /Sign Out toolbar, and then scanning a barcode on a list of names, or on a name tag to open the pickup window.

Selecting this option opens a small window where you can enter the PICKUP ID to search on. This will be then displayed in the [Pickup Properties](#) window.



**P.I.N.** Pressing the PIN icon on the [Sign In / Out Tool Bar](#) Opens the [Pin Records](#) window.



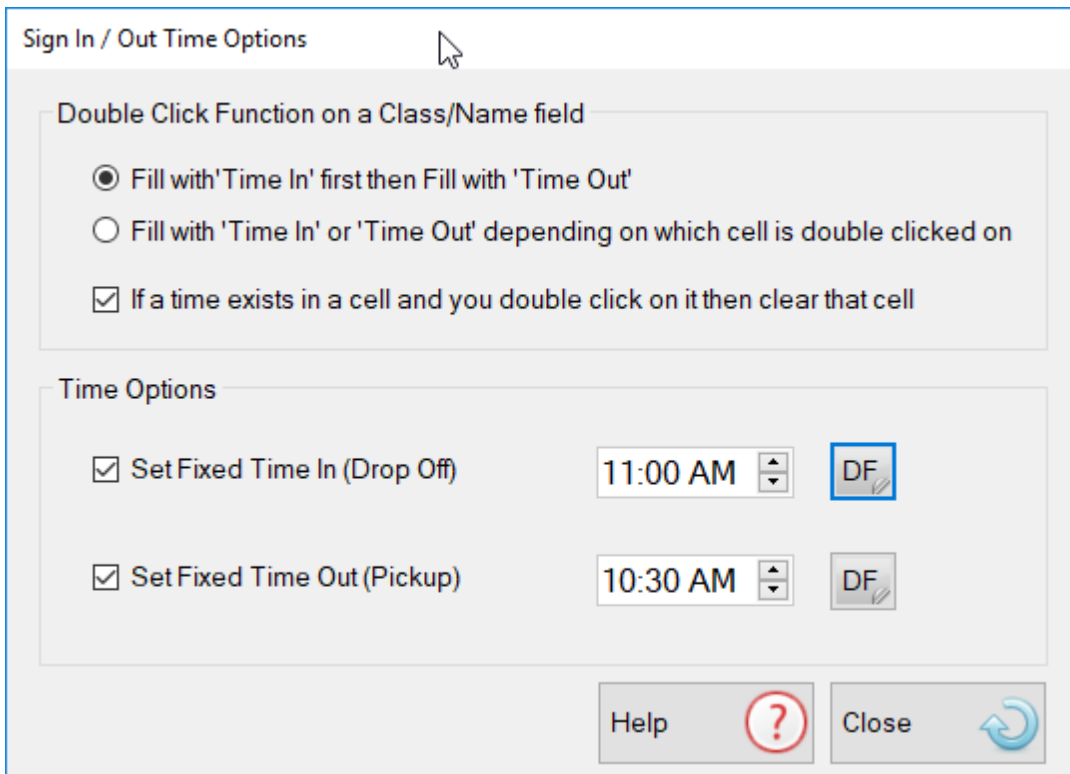
**Pickup ID** Pressing the Pickup ID button on the [Sign In / Out Tool Bar](#) opens the [Pickup ID Records](#) window.



**Options** The Options button on the [Sign In / Out Tool Bar](#) opens up the following window. You can set here how double clicking in selected cells behaves.



Click on each area of this window for more information on how this feature works.



#### Double Click Function on a Class/Name field

- Fill with 'Time In' first then Fill with 'Time Out'
- Fill with 'Time In' or 'Time Out' depending on which cell is double clicked on
- If a time exists in a cell and you double click on it then clear that cell

When Double Clicking on a persons Class / Name Cell, one of 2 actions can be performed.

1. Select the first option to enable Fill the Time In field on the first double click, and next time you double click, fill in the time out.
2. Fill with Time In or Time Out depending on which cell your double click in. For example, double click on a time in to enter a time in.

If a time exists in a cell and you double click on it then clear that cell

With this option ticked, you can double click on a time that has been entered, and clear that cell.

Set Fixed Time In (Drop Off) 11:00 AM

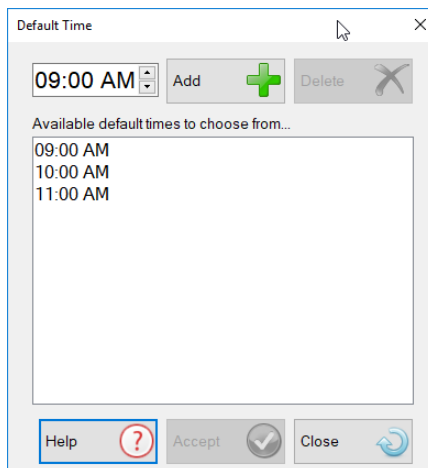
Tick this to set a fixed time for entry in the Time In field. This is not as accurate as just letting the computer add the time that you double click to enter a time.

Set Fixed Time Out (Pickup) 10:30 AM

Tick this to set a fixed time for entry in the Time Out field. This is not as accurate as just letting the computer add the time that you double click to enter a time.



Press the DF button to select from a list of Default Times you have created in this window. Pressing the DF button loads the following window



#### Add a Time

Simply type a time or use the small arrows to adjust the time and press the Add button

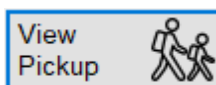
#### Delete a Time

Select it from the list and press Delete

#### Use a time in the Sign In / Sign Out options window

Select the time and press the Accept Button

#### View Pickup



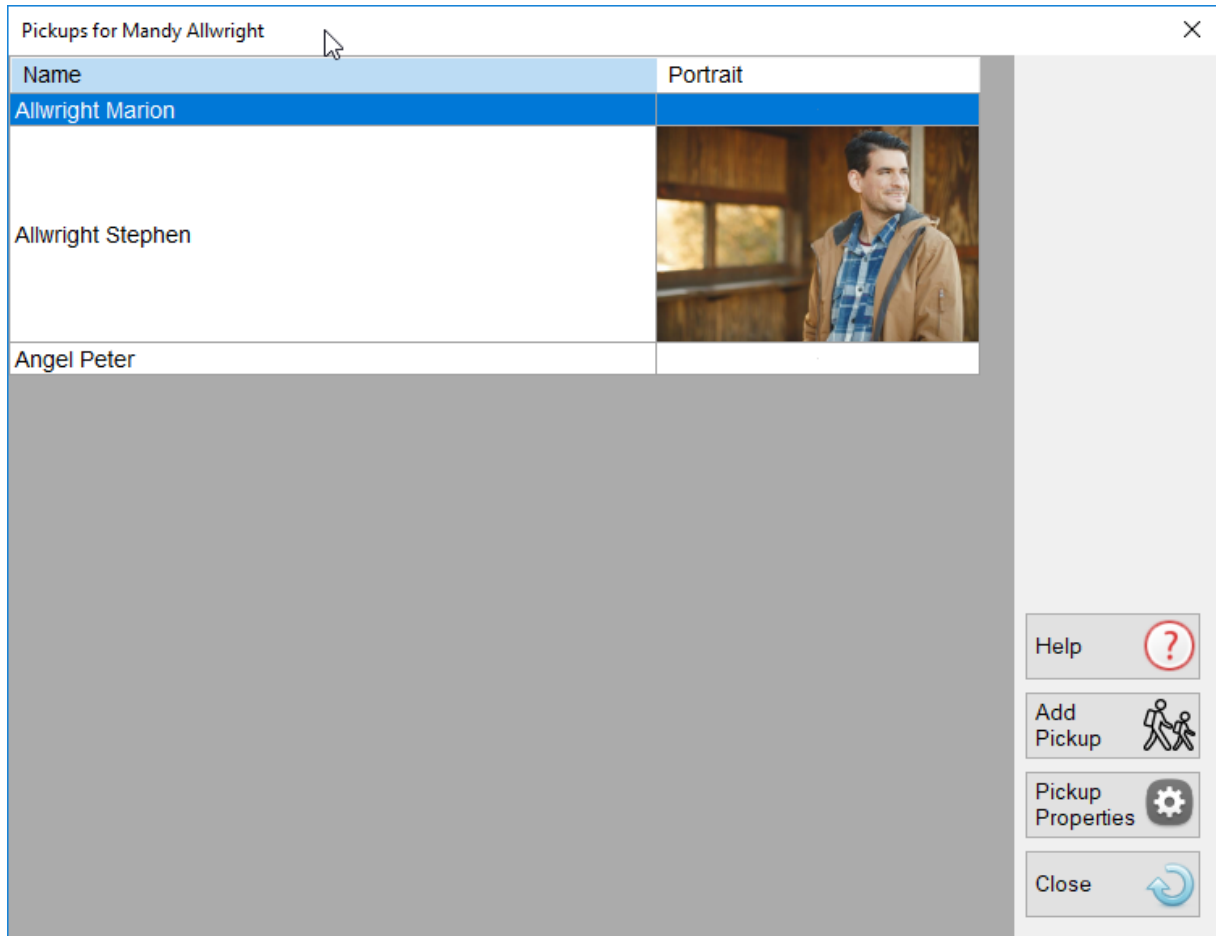
The View Pickup button on the [Sign In / Sign Out Main Window](#) shows you the available pickup people for the selected student. You can see in the sample below this pickup window is for people picking up or available to pickup Mandy Allwright.

Options available on this window are

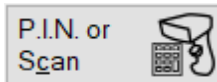
Double Click on a pickup person to access their [Pickup Properties](#)

Add Pickup button to add a new pickup

Pickup Properties button to also access the selected persons [Pickup Properties](#)




#### Pin or Scan



Pressing this button sets the Sign In / Sign Out process into PIN NUMBER or SCAN mode to accept either for recording a pickup.

This opens the following window for Capturing a PIN NUMBER or a SCANNED barcode.

**P.I.N. Entry**



Pickup Person Mode

Request the Pickup Person to enter their P.I.N. Now.  
Once entered request them to press the Enter Key.

Sign Student In  
 Sign Student Out

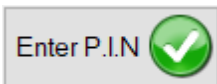
Entry Method By...  
 Pickup P.I.N.  
 Pickup Bar Code  
 Student Bar Code

Admin Level

Enter P.I.N.

Close P.I.N. Entry

Simply select SIGN STUDENT IN, and enter the PIN NUMBER, or SCAN a barcode with the appropriate bar code selection. (Pickup or Student Barcode)

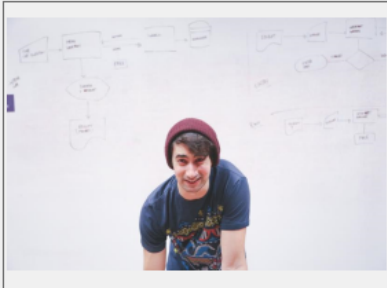


Once entered and ready to accept, the Enter PIN button is activated - press this to record the Sign in or Sign Out.

Once Entered the following screen is displayed allowing you to commit the event of Sign in or Sign out as required.

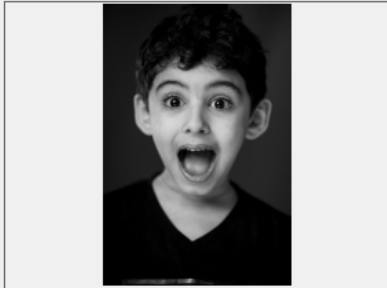
Sign In / Out by P.I.N. ×

(Pickup) Ray Barton



Student  
Drop Off Mode

(Student) Ernie Barton



Pickup Properties

Student Properties

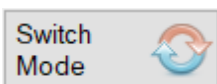
Time In: 11:00 AM

Double Click on Image Area for Editing

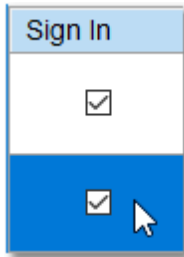
Sign In	Class \ Name	Alerts	Portrait
<input type="checkbox"/>	Kingdom Kids \ Barton Ernie		
<input type="checkbox"/>	Kingdom Kids \ Barton Karren		

(v) = Visitor

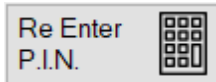
Help 
Switch Mode 
Re Enter P.I.N. 
Commit Drop Off's 
Close



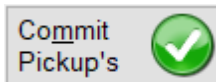
Press this to swap the mode between DROP OFF mode, or PICKUP MODE. The Mode is clearly shown in RED at the top of the screen.



You can Manually tick those students being picked up or dropped off by the same pickup person.

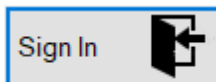


Press the Re-Enter PIN to grab another persons PIN number




The Commit button can read Commit Pickup's or Commit Drop Off's. This commits that event to the database, depending on the Mode this window is in.


### Sign In





Pressing the Sign In Button lets you assign a person as a sign in person for the currently selected student


The screen below is displayed for you to assign a person as the Sign In / Drop Off person.


Drop Off Person for Mandy Allwright	
Name	Portrait
Allwright Marion	
Allwright Stephen	
Angel Peter	


Drop Off Properties 


Drop Off 

No Drop Off 

Drop Off Properties 

Drop Off 

No Drop Off 

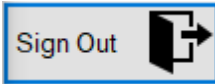
Cancel 

Press this to view the [Properties](#) for the selected Drop Off / Pickup Person

Pressing these buttons will toggle the status between recording a drop off, and not recording a drop off for the selected student.

**Double Click**  
Double Clicking on a name or portrait will open the [Properties](#) for that drop off person.

**Sign Out**



Pressing the Sign Out Button lets you assign a person as a sign out person for the currently selected student

The screen below is displayed for you to assign a person as the Sign Out / Pickup Person

Pickup Person for Mandy Allwright	
Name	Portrait
Allwright Marion	
Allwright Stephen	
Angel Peter	

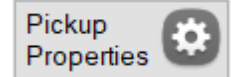
Help ?

Pickup Properties ⚙️

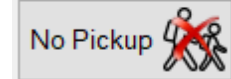
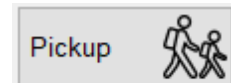
Pickup 🚶

No Pickup 🚶❌

Cancel ↩️



Press this to view the [Properties](#) for the selected Drop Off / Pickup Person



Pressing these buttons will toggle the status between recording a pick up, and not recording a pick up for the selected student.

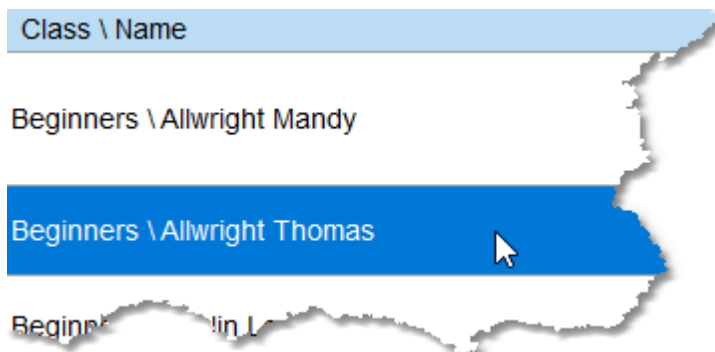
**Double Click**

Double Clicking on a name or portrait will open the [Properties](#) for that pick up person.

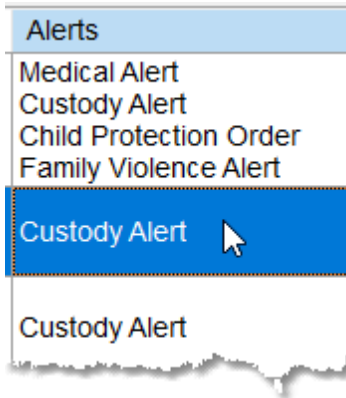
**Cell Clicking**

In the Sign In / Sign Out grid area (the area showing all the student data for registering a Sign In / Sign Out event) there are a number of useful options available by either single or double clicking in a cell in that grid. Each of these is described below.

Please note that some of the actions that can be performed are also controlled by the [Options](#) button on the Sign In / Sign Out toolbar  
 Clicking or Double Clicking on a name in the Class \ Name column will do one of two different tasks. See the [Options](#) area for what can be done by double clicking on the name cell.



Double clicking on an Alert Cell opens the [Student Properties](#) window for the selected student you have clicked on.

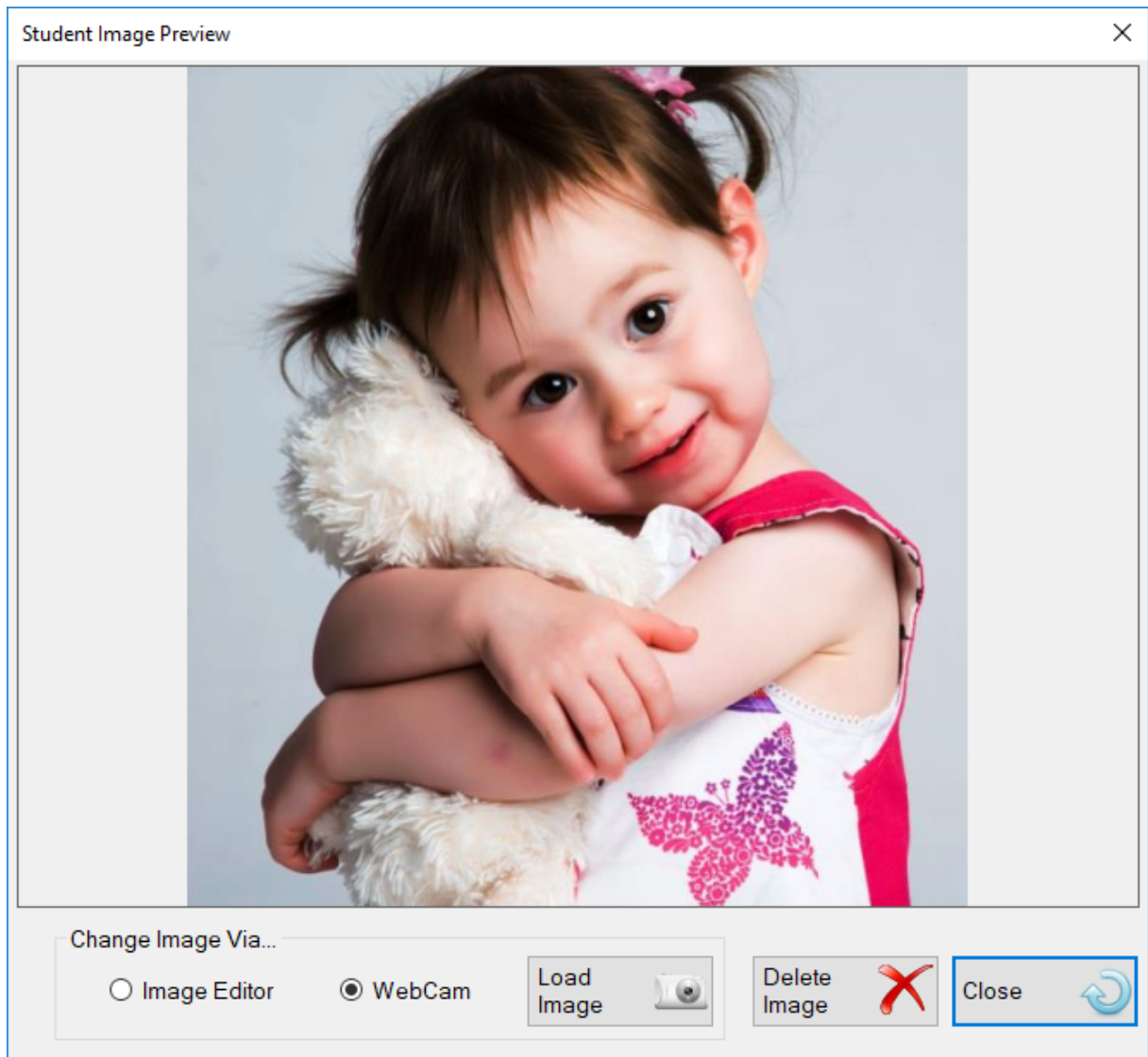


Double Clicking in the Time In cell will do a number of different things depending on what options you have set in the [Options](#) window.

Double Clicking in the Time Out cell will do a number of different things depending on what options you have set in the [Options](#) window.

Double clicking on a portrait picture in the Sign In / Sign Out grid lets you see a larger version of the image, and alternatively replace that image with a new one if needed.





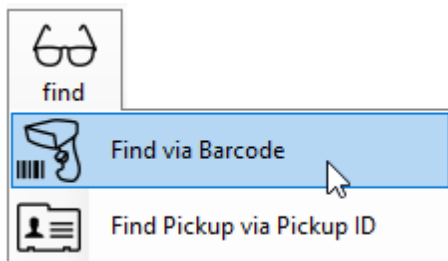
Double Click in a blank Drop Off Person cell to add a drop off person.

See also [Sign In](#) which does the same task.

Double Click in a blank Pick Up Person cell to add a pick up person.

See also [Sign Out](#) which does the same task.

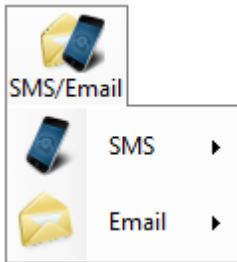
### Classroom Manager Find



Press Find - Find Via Barcode to do a barcode search.

Press Find - Find Pickup via Pickup ID to do a search on the Pickup ID

## Classroom Manager SMS/Email



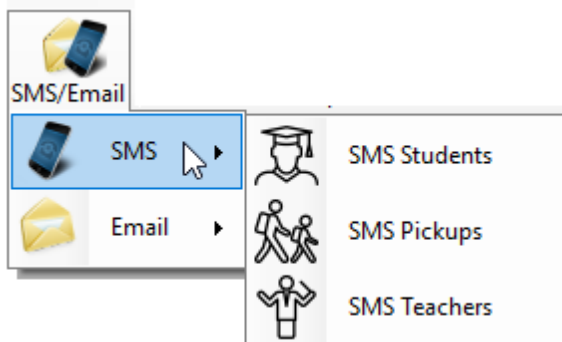
The SMS / Email button on the [Classroom Manager Toolbar](#) gives you the tools to communicate directly with pickup and drop off people, as well as students and teachers.

SMS is the recommended communication method for this area as messages will be delivered faster and more noticeable to a parent if they have a child in your care and you need to get the parent to you for a problem. See [SMS Configuration](#) for how to setup SMS for Pastoral Care.

Each of the SMS screens for Students, Teachers and Pickup People are all essentially the same, except that the list of people to select from is filtered automatically for the menu item you select. This is the same for emails.

So we will show here only one SMS and one EMAIL screen for the purpose of explaining the use of each communication area.

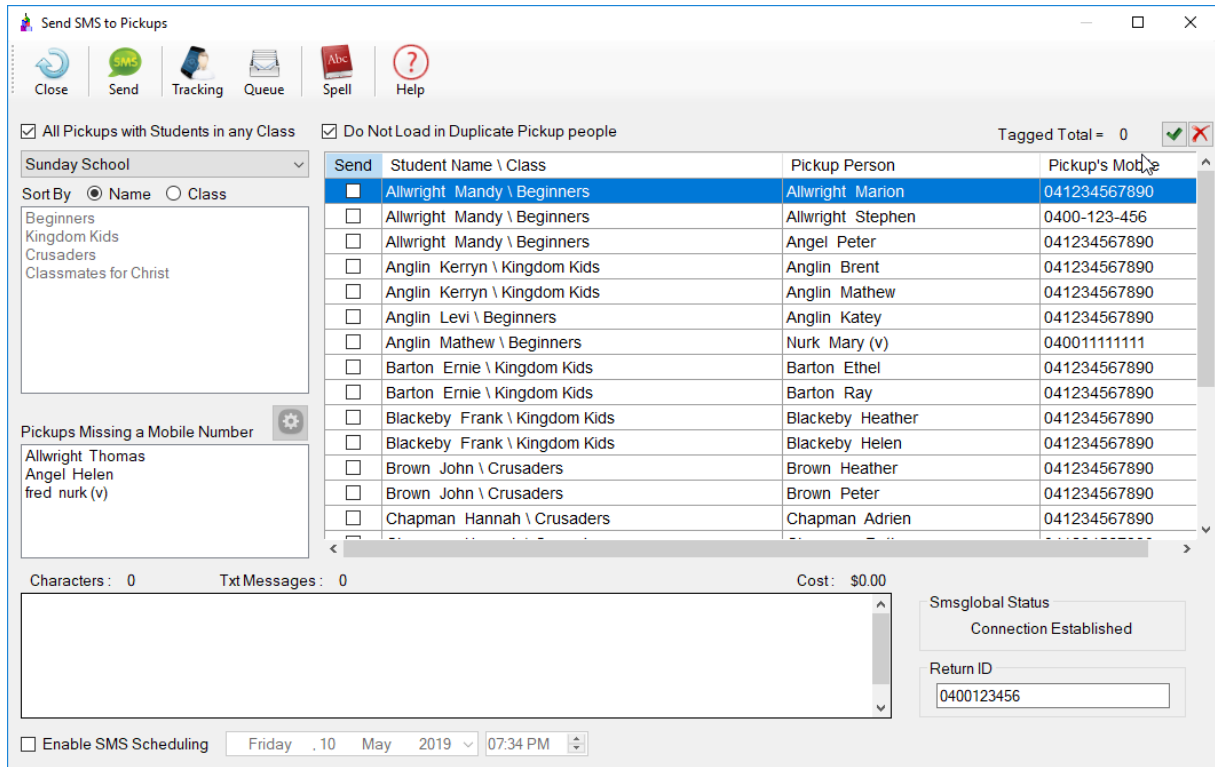
### SMS



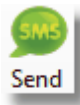
Shown below is a sample SMS screen for Pickups. This is the only sample we are showing, as the Student and Teachers SMS area is very similar.



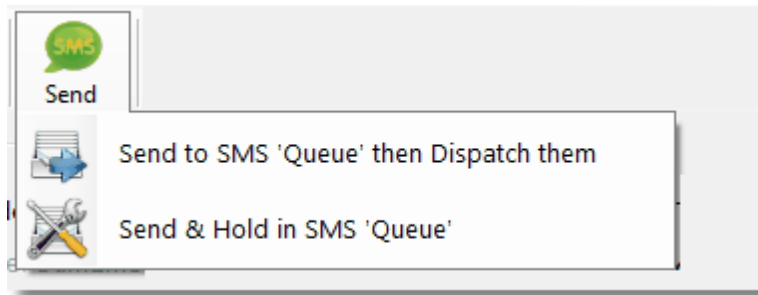
Click on each part of this window to learn more about sending an SMS in the Classroom Manager



**Send**



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

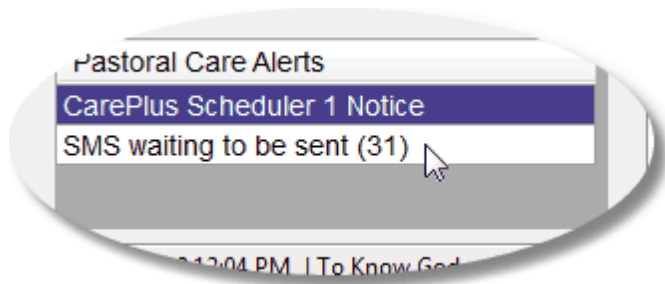


**Send to Queue and Dispatch**

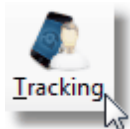
This option sends the SMS messages immediately. In either case, all SMS messages must go via the new Pastoral Care [SMS Queue](#) program. This program handles SMS messages and allows control / use of Pastoral Care it'self to remain with the user while messages are being sent.

**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.



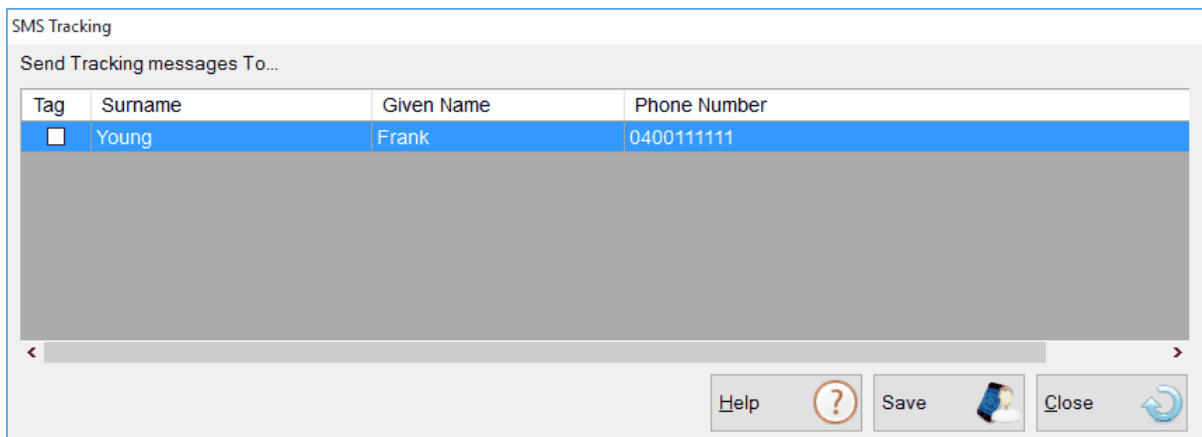
## Tracking



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.

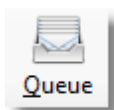
## Save Settings

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.



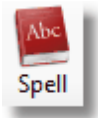
## SMS Queue

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).



Pressing the Queue button will open the standard [SMS Queue](#) window

**Spell**



Access the Spell Checker Settings

**All People**

View All Students in Classes

Tick the View All option to view all Students, Teachers or Pickup People depending on which SMS area you have loaded.

**No Duplicates**

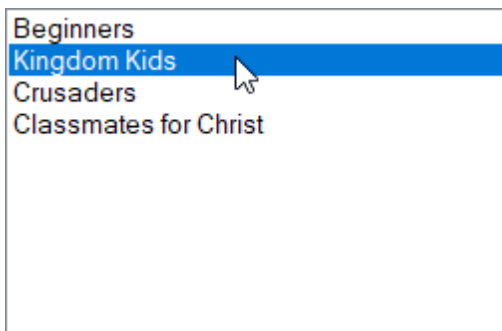
Do Not Load in Duplicate Students

Tick this option to not load in duplicate people (Students, Teachers or Pickup People depending on which SMS area you have selected)

**Filters**

Depending on the area you have loaded (SMS for Students, Teachers or Pickups) there will be different filters.

Simply select either the [All People](#) option above this area, or manually select a group you want to message.

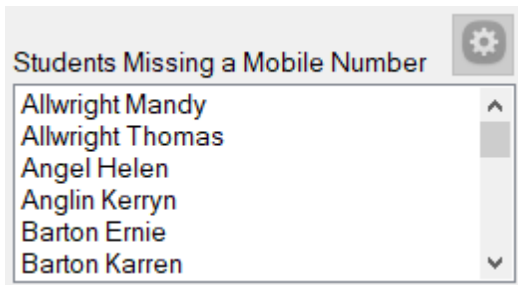


**Select People**

Tick the people that you want to send a message to.

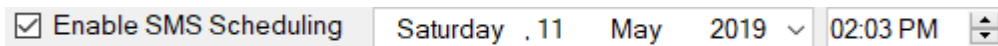
Send	Student Name \ Class	Pickup Person	Pickup's Mobile
<input checked="" type="checkbox"/>	Allwright Mandy \ Beginners	Allwright Marion	0412345678
<input type="checkbox"/>	Allwright Mandy \ Beginners	Allwright Stephen	0400-12345678
<input type="checkbox"/>	Allwright Mandy \ Beginners	Angel Peter	0412345678
<input type="checkbox"/>	Anglin Kerryn \ Kingdom Kids	Anglin Brent	0412345678
<input type="checkbox"/>	Anglin Kerryn \ Kingdom Kids	Anglin Mathew	0412345678
<input type="checkbox"/>	Anglin Levi \ Beginners	Anglin Katey	0412345678
<input type="checkbox"/>	Anglin Mary \ Mary (y)		

### Mobile Number Missing



This list will show all people in the area you have loaded that do not have a mobile number.

### SMS Scheduling



Tick this option and choose a date and time in the future to send your message.

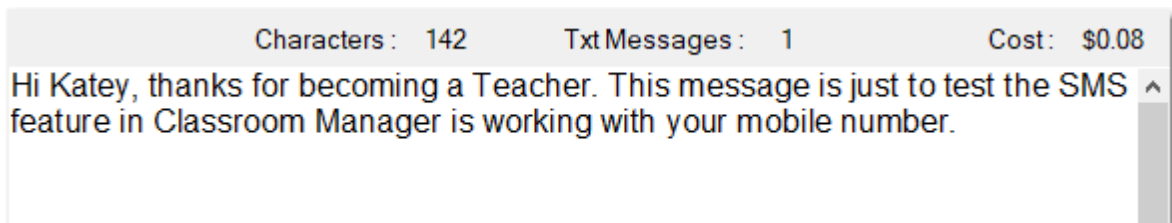
See [Scheduling](#) for more details on the SMS schedule feature.

### Tagging



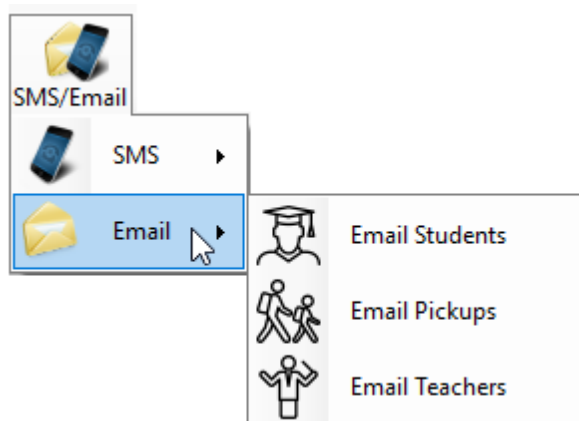
Tick to Tag all people in the list, or press the Cross to remove all ticks from the list.

### Compose SMS



Compose your SMS here, you can watch the number of characters above this as you type.

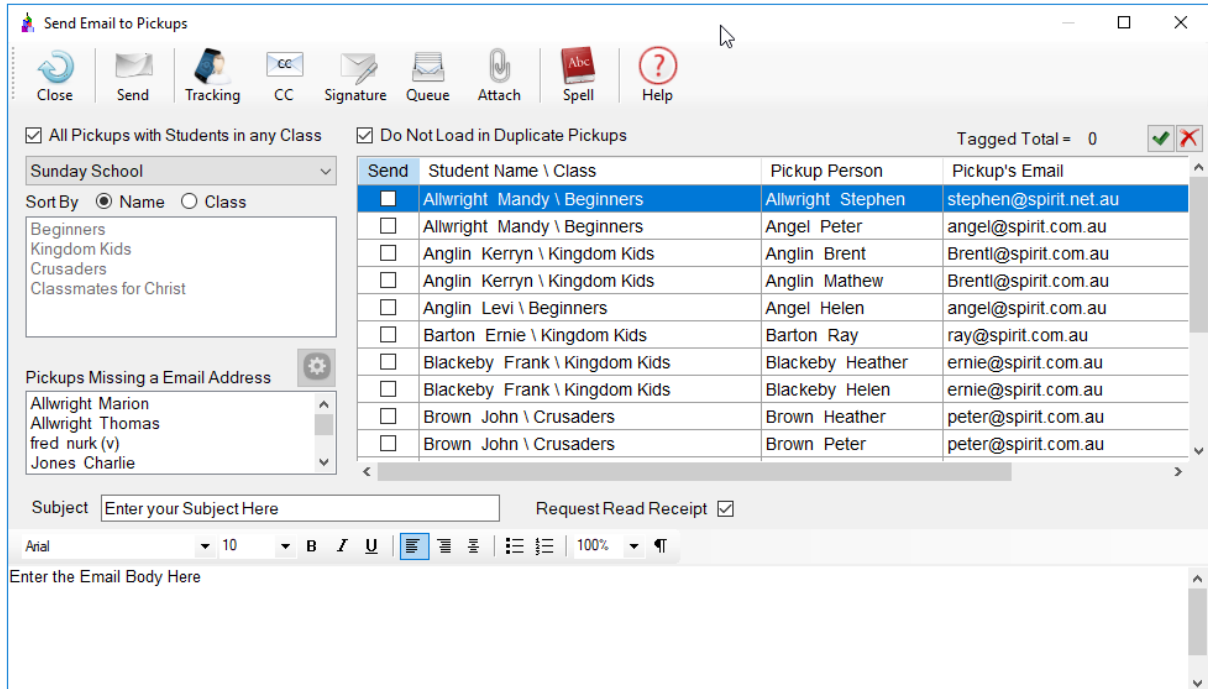
### Email



Shown below is a sample Email screen for Pickups. This is the only sample we are showing, as the Student and Teachers Email area is very similar.



Click on each part of this window to learn more about sending an Email in the Classroom Manager



### All People

View All Students in Classes

Tick the View All option to view all Students, Teachers or Pickup People depending on which Email area you have loaded.

### No Duplicates

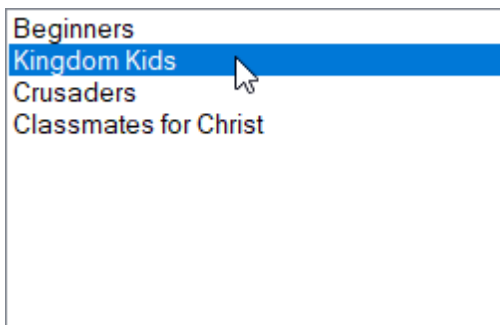
Do Not Load in Duplicate Students

Tick this option to not load in duplicate people (Students, Teachers or Pickup People depending on which Email area you have selected)

### Filters

Depending on the area you have loaded (Email for Students, Teachers or Pickups) there will be different filters.

Simply select either the [All People](#) option above this area, or manually select a group you want to message.



### List of Recipients

Depending on any selected, and what area you have selected (Teachers, Students or Pickups) this list will show selected people with an email address. Tick (Tag) those people you want to send an email to.

Send	Student Name \ Class	Pickup Person	Pickup's Email
<input checked="" type="checkbox"/>	Allwright Mandy \ Beginners	Allwright Stephen	stephen@spirit.net.au
<input type="checkbox"/>	Allwright Mandy \ Beginners	Angel Peter	angel@spirit.com.au
<input type="checkbox"/>	Anglin Kerryn \ Kingdom Kids	Anglin Brent	Brentl@spirit.com.au
<input type="checkbox"/>	Anglin Kerryn \ Kingdom Kids	Anglin Mathew	Brentl@spirit.com.au
<input type="checkbox"/>	Anglin Levi \ Beginners	Angel Helen	angel@spirit.com.au
<input type="checkbox"/>	Anglin Levi \ Beginners	Anglin Katey	Brentl@spirit.com.au
<input type="checkbox"/>	Anglin Mathew \ Beginners	Nurk Mary (v)	mary@nurkfamily.com
<input type="checkbox"/>	Barton Ernie \ Kingdom Kids	Barton Ethel	ray@spirit.com.au
<input type="checkbox"/>	Barton Ernie \ Kingdom Kids	Barton Ray	ray@spirit.com.au
<input type="checkbox"/>	Blackeby Frank \ Kingdom Kids	Blackeby Heather	ernie@spirit.com.au
<input type="checkbox"/>	Blackeby Frank \ Kingdom Kids	Blackeby Helen	ernie@spirit.com.au
<input type="checkbox"/>	Brown John \ Crusaders	Brown Heather	peter@spirit.com.au
<input type="checkbox"/>	Brown John \ Crusaders	Brown Peter	peter@spirit.com.au

### Email Address Missing

This list will show you all the people within the [Filters](#) that don't have an email address.

Pickups Missing a Email Address
Allwright Marion
Allwright Thomas
fred nurk (v)
Jones Charlie
Jones Wendy
Knight Mike

### Subject

Subject

Enter the email Subject here

### Body

Enter the Body of the email here

### Read Receipt

Request Read Receipt

Select this if want a read receipt to come back.

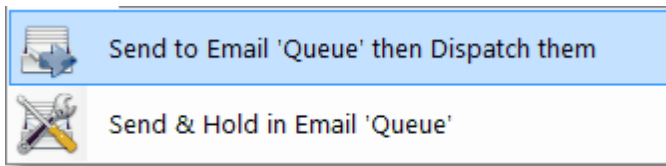
### Send



After 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.





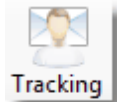
## Send and Dispatch

Send and Dispatch your email now. Your email will be sent 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 your email to the queue program for sending later.

## 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.

Email Tracking

Send Tracking Email To...

Tag	Surname	Given Name	Email Address
<input checked="" type="checkbox"/>	Carrow	Hellen	hellen.carrow@bellingstfellowship.org
<input type="checkbox"/>	Carrow	Peter	peter.carrow@bellingstfellowship.org
<input type="checkbox"/>	Kimmings	Jane	jane.kimmings@bellingstfellowship.org

Help ? Save Close

## CC



Press this to add a Carbon Copy email send to one or more people.

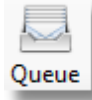
See [CC](#) for more information.

## Attach



Press this to attach a file to the email before sending.

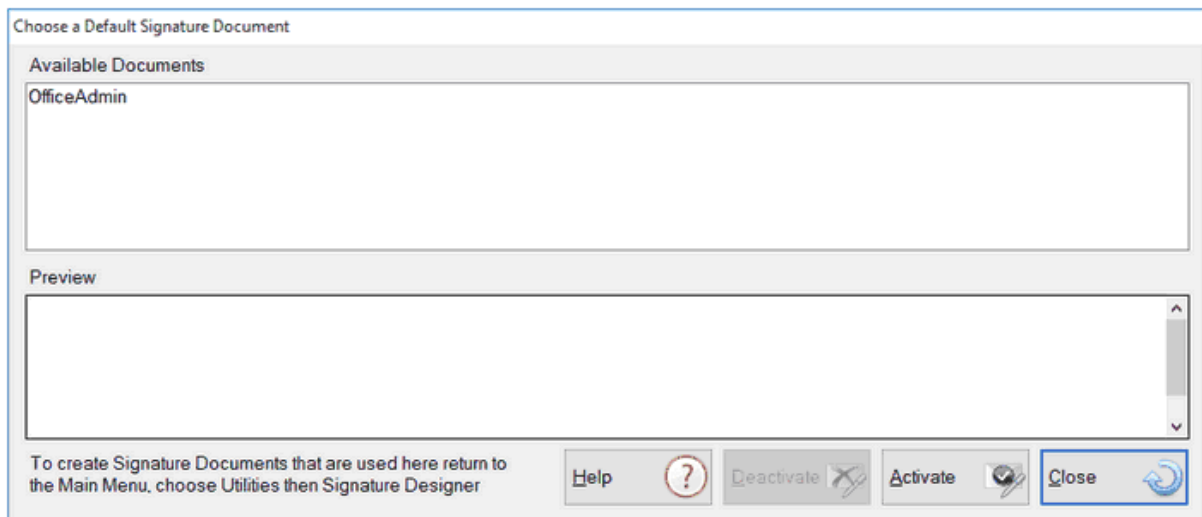
## Queue



The Queue Button opens the standard Email Queue program. See [Email Queue](#) for full details.

## Signature

This window lets you set the DEFAULT signature to use for the current workstation. Simply select the Signature File listed in the top section, and press Activate. Pressing Deactivate will remove the default signature. See [Signature](#) for more information on this



## Properties

Each component of the Classroom Manager has its own properties window. These windows allows you to control features of these components, and "features" of individuals as needed to manage this area.



All properties can be accessed by a common icon. Wherever you see an active gear icon you will be able to access the properties of a selected person.

### Check out:

[Student Properties](#) - [Student Properties - Visitors](#) - [Pickup Properties](#) - [Pickup Properties - Visitors](#) - [Teacher Properties](#)

## Student Properties

Show below is the standard Student Properties window available throughout the Classroom Manager.



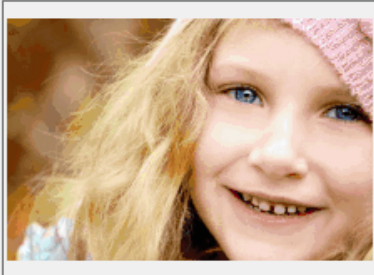
Click on each part of this window to learn more about Student Properties

**Student Properties**

**Kerryn Anglin Properties...**

**Add / Change Image Via...**

Image Editor  
 WebCam



**SMS**

**Email**

**Class**

**Sign In Records**

**Medical**

**Contact**

**Visitation**

**Help**

**Delete Student**

**Create Student**

**Close**

**Pickup Person**

- Anglin Brent
- Anglin Mathew

Medical Alert

Custody Alert

Child Protection Order


Family Violence Alert

**Notes**

### Image

**Add / Change Image Via...**

Image Editor  
 WebCam



Use the IMAGE area to save a photo of the selected student.

You can load an image that you already have on your computer, or for a more practical solution, you can use the Web Cam interface to grab a picture on the spot. See [Via Webcam](#)

### Pickup Person

This section shows any pickup people assigned to the selected student.



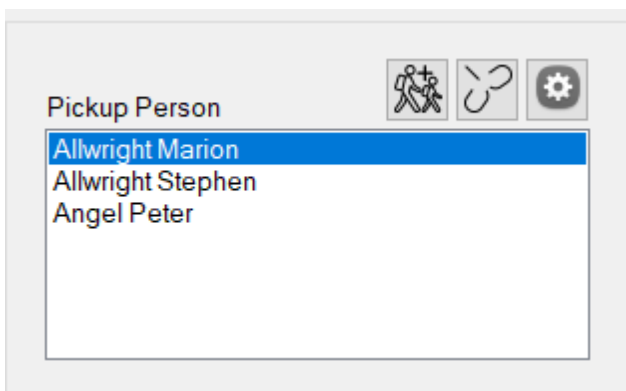
Add a New Pickup Person



Break the link between the selected Pickup Person and the Selected Student



View / modify the [Pickup Properties](#) for the selected pickup person



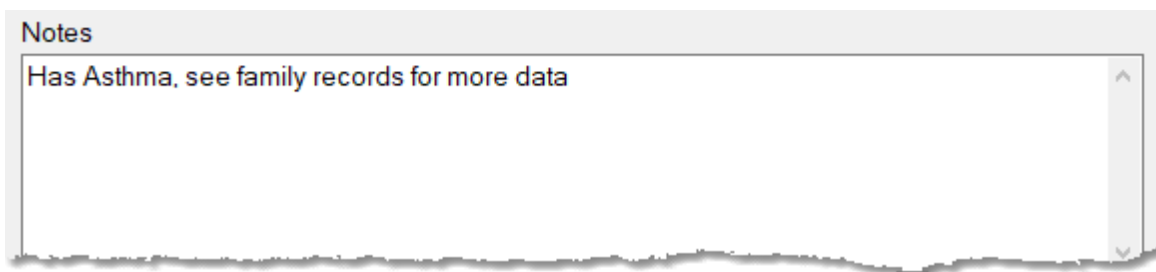
### Alerts

View / Modify any alerts for the selected student.

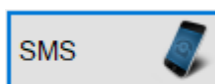
- Medical Alert
- Custody Alert
- Child Protection Order
- Family Violence Alert

### Notes

View / Alter any notes for the selected student



### SMS



Send an SMS to the selected Pickup Person, or the personal mobile on record for the selected student. Also check out [Send SMS](#) with information on the SMS Queue, and SMS tracking.

**Email**

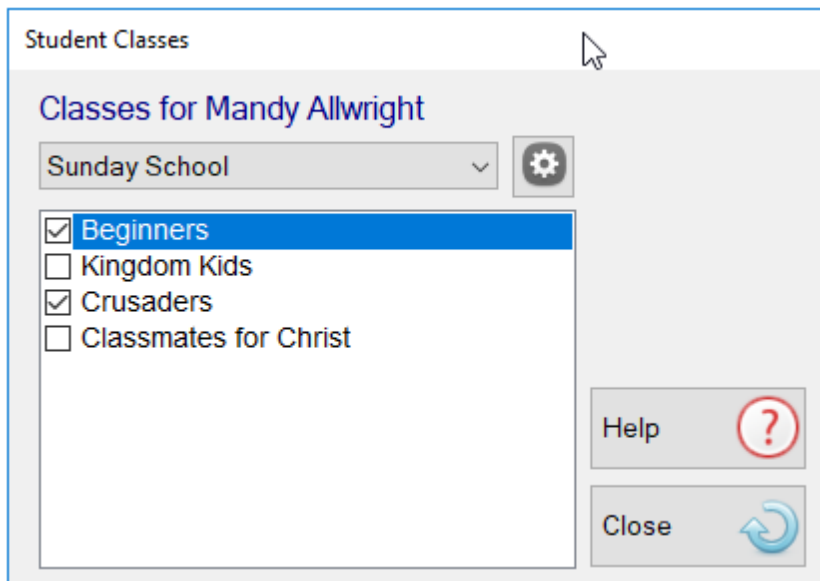
Send an Email to the selected Pickup Person, or the personal email on record for the selected student. [See Create Email](#) for more information on composing and sending an email.

**Class**

Select a department and tick the classes that the selected student participates in.



Click the Teacher Properties to lookup teachers while in this window.

**Sign In Records**

View Sign In / Sign Out records *for the selected student*.

See [View Student Sign In / Out Records](#) for more information.


**Medical**


Add, Remove or edit Medical Information on the selected student. This information is also editable and available from within the Family File if the student is not a visitor.


Mandy Allwright Medical Information ✕


Available Medical Groups...


- Asthma
- Peanut Allergy

Add 

Remove 

Up 

Down 



Members 

Current Medical Groups...

- Asthma
- Peanut Allergy**

Medical Notes...

Severe reaction to Peanuts. Student always has EPI PEN in her back pack.

Help  Close 

**Contact**

The Contact window shows all family members for the selected Student. Shown below is a student (Mandy) selected on this form and you can see all of Mandy's details. Clicking on other family members will show you their details as well.

Information on this form is fully updated with the Family File records, except for visitors (who have no family record!).

Contact Details
✕

### Allwright Family Contact Details

Individual Contact

Stephen (a)	Mobile Phone <input style="width: 80%;" type="text" value="0400-123456"/>
Marion (a)	Personal Email <input style="width: 80%;" type="text" value="mandy@myemail.org"/>
Thomas (c)	Business Phone <input style="width: 80%;" type="text"/>
Mandy (c)	Business Email <input style="width: 80%;" type="text"/>

(a) = Adult (c) = Child

Family Contact

Home Phone

Family Mobile

Family Email Address

Residential Address


Street


Suburb  ---


Postcode


State

Country



Help 

Map 

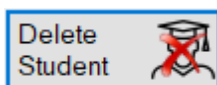
Close 

### Visitation

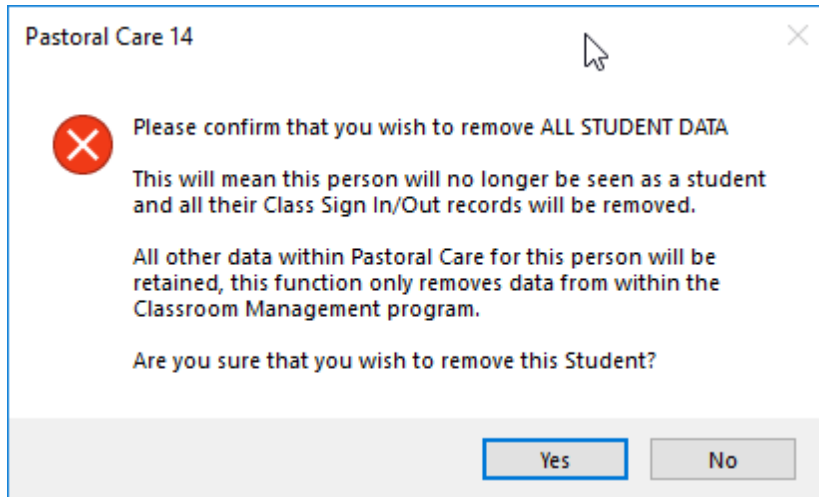
Load the standard Visitation Request window to request a pastoral visit to the house of the student.

See [Visitation Request](#) for more information

### Delete Student



Delete the current student. This will remove all student data as well as sign in and sign out records for them. The following warning is shown when this button has been pressed.



### Create Student

When this option is available, press this to create a new student.

(See [Add Student](#))

### Student Properties - Visitors

The Visiting Student properties has slightly less information available than the properties of a student who is in your database. This is simply because the person in your database naturally has more information available to see in the Classroom Manager.



Click on each part of this window to learn more about Visiting Student Properties



Visiting Student Properties

Properties...

Surname

Given Name

Title

Birth Date  ...

Home Phone

Mobile

Email

Street

Suburb

Postcode

Added

Medical Alert

Custody Alert

Child Protection Order

Family Violence Alert

Pickup Person

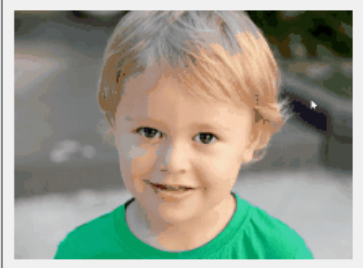
fred nurk (v)  
Nurk Mary (v)

Add / Change Image Via...

Image Editor  WebCam

Load Image

Delete Image



Notes

SMS

Email

Class

Sign In Records

Help

Delete Student

Create Student

Close

### Personal Details

For a Visitor, please try and capture as much information as possible.

Surname	<input type="text" value="Dean"/>
Given Name	<input type="text" value="Heather"/>
Title	<input type="text" value=""/>
Birth Date	<input type="text" value="15/06/2015"/> ... 3 years
Home Phone	<input type="text" value="07-1234-5678"/>
Mobile	<input type="text" value=""/>
Email	<input type="text" value=""/>
Street	<input type="text" value="3 Graham Court"/>
Suburb	<input type="text" value="Coolie Beach"/>
Postcode	<input type="text" value="7000"/>
Added	<input type="text" value="Saturday . 8 September 2018"/>

### Alerts

Select any alerts that apply to this visiting student.  
If there are any alerts, make sure you fill in the notes appropriately.

- Medical Alert
- Custody Alert
- Child Protection Order
- Family Violence Alert

### Pickup Person

This section shows any pickup people assigned to the selected student.



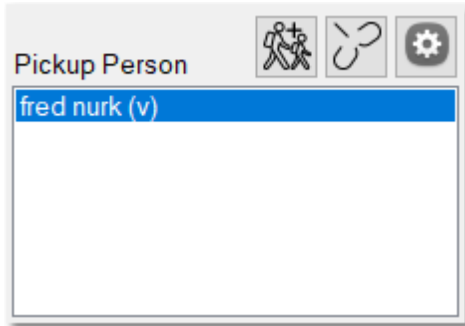
Add a New Pickup Person



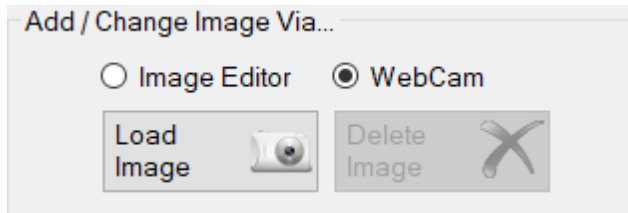
Break the link between the selected Pickup Person and the Selected Student



View / modify the [Pickup Properties](#) for the selected pickup person



### Image



Use the IMAGE area to save a photo of the selected visiting student.

You can load an image that you already have on your computer, or for a more practical solution, you can use the Web Cam interface to grab a picture on the spot. See [Via Webcam](#)

### Notes

View / Alter any notes for the selected student



### SMS

Send an SMS to the selected individual.

For more information on sending SMS messages, also check out [Send SMS](#) with information on the SMS Queue, and SMS tracking.

### Email

Send an Email to the selected individual.

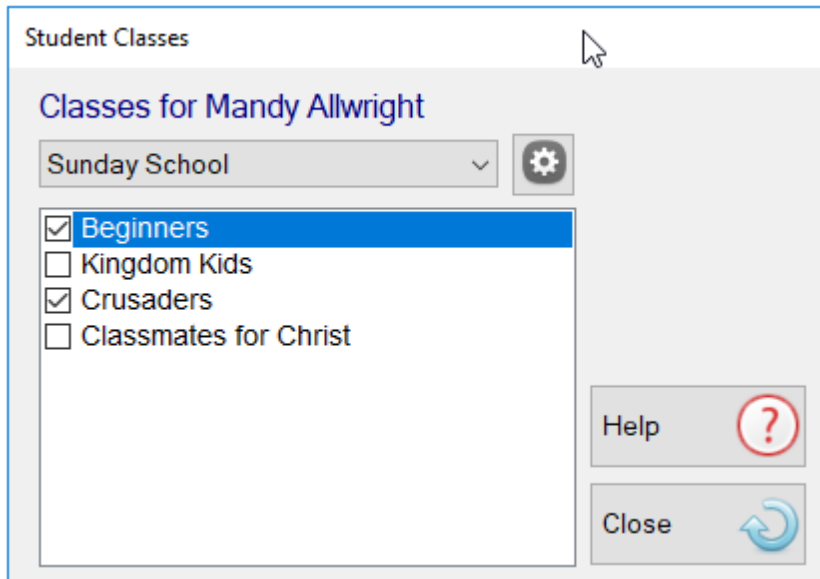
[See Create Email](#) for more information on composing and sending an email.

### Class

Select a department and tick the classes that the selected student participates in.



Click the Teacher Properties to lookup teachers while in this window.

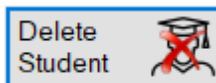


### Sign In Records

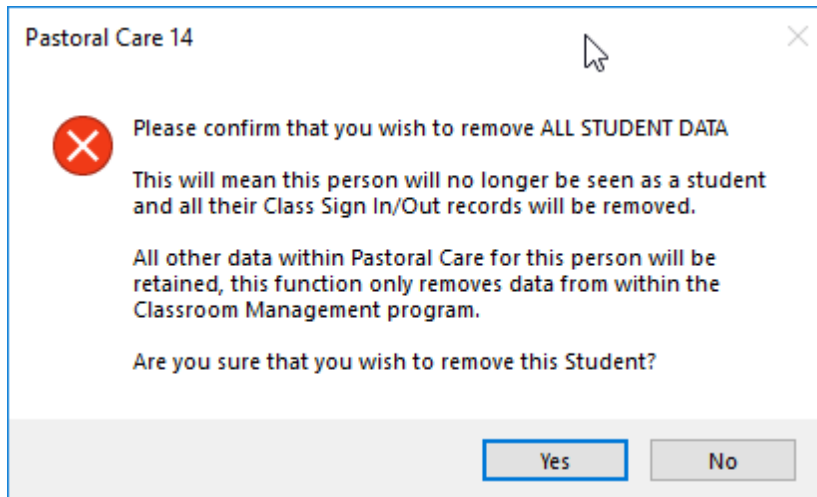
View Sign In / Sign Out records *for the selected student*.

See [View Student Sign In / Out Records](#) for more information.

### Delete Student



Delete the current student. This will remove all student data as well as sign in and sign out records for them. The following warning is shown when this button has been pressed.



### Create Student

When this option is available, press this to create a new student.

(See [Add Student](#))

### Pickup Properties




Shown below is the standard Pickup Properties window. This window both displays and allows edits of the Pickup Properties



Click on each part of this window to learn more about Pickup Properties

Pickup Person Properties

**Thomas Allwright**

Students to Pickup   

- Allwright Thomas

Notes

Pickup ID

Mobile Preference



Use Alternative Mobile

Email Preference

Use Alternative Email



Add / Change Image Via...


Image Editor  WebCam


  


P.I.N. for Collecting the Student(s)...


Currently NO P.I.N.


  


SMS 


Email 


Contact 

Visitation 

Help 




Delete Pickup 

Create Pickup 

Close 

**Students To Pickup**

This shows the student(s) that the selected pickup person is authorised to pickup.

Students to Pickup   

- Allwright Thomas

**Add Student For Pickup**



Press this to add another student that the selected pickup person will be authorised to pickup.

**Break Link**

Pressing the Break Link button will break the pickup link between the selected student and the selected Pickup Person.

**Student Properties**

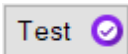
Click this to display the [Student Properties](#) window.

**Notes**

Enter any notes about the Pickup Person

**Pickup Id**

Enter or modify the Pickup ID that is assigned to the selected Student for the selected Pickup Person.

 
**Test**

Pressing the Test button will check if this Pickup ID has already been used.

**Alternative Mobile**

Tick this option and enter a manual Mobile Phone number for this Pickup Person.

 Use Alternative Mobile 
**Select Mobile**

Select a mobile for use with the selected Pickup Person.

Family Phone (054-33-5478)

Stephen Allwright Personal Mobile (0400-123-456)

Stephen Allwright Business Phone (018-998725)

Marion Allwright Personal Mobile (041234567890)

Marion Allwright Business Phone (054-229876)

Mandy Allwright Personal Mobile (0400-123456)

**Alternative Email**

Tick the Alternative Email option and enter an email for use with this pickup person.

 Use Alternative Email 
**Select Email**

From this selection box choose the appropriate email for the selected individual.

**Image**

Add / Change Image Via...

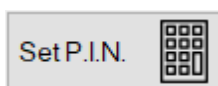
Image Editor
 WebCam

Use the IMAGE area to save a photo of the selected person

You can load an image that you already have on your computer, or for a more practical solution, you can use the Web Cam interface to grab a picture on the spot. See [Via Webcam](#)

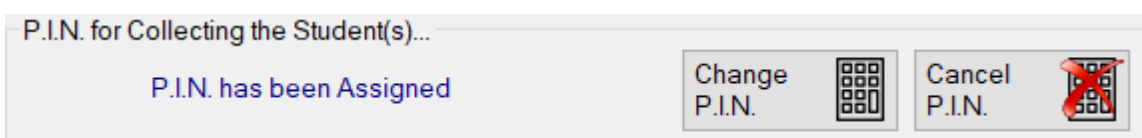
## PIN

Press the Change PIN or Cancel PIN to make a change to a PIN number for a Pickup Person to pickup a student.



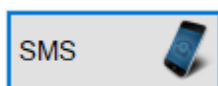
setting a PIN number

If there is no PIN assigned, the Set PIN button is shown in this section for



See also [Entering a PIN NUMBER](#) for more information on PIN numbers

## SMS



Send an SMS to the selected Pickup Person, or the personal mobile on record for the selected student. Also check out [Send SMS](#) with information on the SMS Queue, and SMS tracking.

## Email



Send an Email to the selected Pickup Person, or the personal email on record for the selected student. [See Create Email](#) for more information on composing and sending an email.

## Contact

The Contact window shows all family members for the selected individual. Shown below is a student (Mandy) selected on this form and you can see all of Mandy's details. Clicking on other family members will show you their details as well.

Information on this form is fully updated with the Family File records, except for visitors (who have no family record!).

Contact Details
✕

### Allwright Family Contact Details

Individual Contact

Stephen (a)

Marion (a)

Thomas (c)

Mandy (c)

Mobile Phone

Personal Email

Business Phone

Business Email

(a) = Adult (c) = Child

Family Contact

Home Phone

Family Mobile

Family Email Address

Residential Address


Street


Suburb  ---


Postcode


State

Country



Help 

Map 

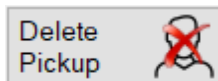
Close 

### Visitation

Load the standard Visitation Request window to request a pastoral visit to the house of the selected individual.

See [Visitation Request](#) for more information

### Delete Pickup



Delete the current pickup.

### Create Pickup

When this option is available, press this to create a new Pickup.

### Pickup Properties - Visitors

The Pickup Properties for a Visitor who is a pickup person is slightly different than a normal member of your database is as a pickup.

See [New Visitor](#) for full details of the Visitors Pickup Properties window.



## Teacher Properties

Teacher properties define all the information about the teacher. A Teacher must be a person already entered into your Pastoral Care Database, and naturally should have a Child Safe record in Pastoral Care, if you are using [Child Safe](#) to manage your Working With Children records.



Click on each part of this window to learn more about Teacher Properties

Teacher Properties

**Stephen Allwright**

Add / Change Image Via...

Image Editor

WebCam

Load Image

Delete Image

SMS

Email

Class

Contact

Visitation

Child Safe

Help

Delete Teacher

Close

Notes

Stephen is great with the Young Adults.

Mobile Preference

Use Alternative Mobile

Stephen Allwright Personal Mobile (0400-123-456)

Email Preference

Use Alternative Email

Stephen Allwright Personal Email (stephen@spirit.net.au)

### Image

Add / Change Image Via...

Image Editor

WebCam

Load Image

Delete Image

Use the IMAGE area to save a photo of the selected person

You can load an image that you already have on your computer, or for a more practical solution, you can use the Web Cam interface to grab a picture on the spot. See [Via Webcam](#)

### Notes

Enter any notes about the Teacher

Stephen is great with the Young Adults.

### Alternative Mobile

Tick this option and enter a manual Mobile Phone number for this Teacher

Use Alternative Mobile

### Selected Mobile

Select a mobile for use with the selected Pickup Person.

▼

- Family Phone (054-33-5478)
- Stephen Allwright Personal Mobile (0400-123-456)
- Stephen Allwright Business Phone (018-998725)
- Marion Allwright Personal Mobile (041234567890)
- Marion Allwright Business Phone (054-229876)
- Mandy Allwright Personal Mobile (0400-123456)

### Alternative Email

Tick the Alternative Email option and enter an email for use with this pickup person.


Use Alternative Email

### Selected Email

From this selection box choose the appropriate email for the selected individual.

Family Email (angel@spirit.com.au)

### SMS

SMS


Send an SMS to the selected Teacher, or the personal mobile on record for the selected Teacher. Also check out [Send SMS](#) with information on the SMS Queue, and SMS tracking.

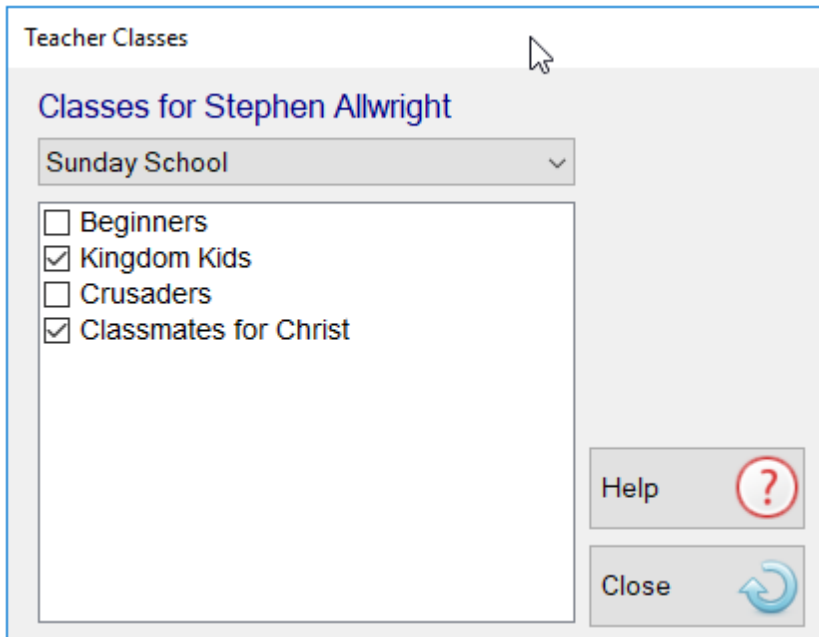
### Email

Email


Send an Email to the selected Teacher, or the personal email on record for the selected Teacher. See [Create Email](#) for more information on composing and sending an email.

**Class**

Select a department and tick the classes that the Teacher participates in.



The screenshot shows a window titled "Teacher Classes" for "Stephen Allwright". At the top, there is a dropdown menu currently set to "Sunday School". Below this is a list of classes with checkboxes: "Beginners" (unchecked), "Kingdom Kids" (checked), "Crusaders" (unchecked), and "Classmates for Christ" (checked). At the bottom right of the window, there are two buttons: "Help" with a red question mark icon and "Close" with a blue circular arrow icon.

**Contact**

The Contact window shows all family members for the selected individual. This shows all family members of the selected teacher, so you can view all contact data for any family members of the teacher.

Shown below is a child in the Allwright Family file (Mandy) selected on this form. You can see all of Mandy's details.

Clicking on other family members will show you their details as well.

Information on this form is fully updated with the Family File records, except for visitors (who have no family record!).

Contact Details
✕

### Allwright Family Contact Details

Individual Contact

Stephen (a)

Marion (a)

Thomas (c)

Mandy (c)

(a) = Adult (c) = Child

Mobile Phone

Personal Email

Business Phone

Business Email

Family Contact

Home Phone

Family Mobile

Family Email Address

Residential Address


Street


Suburb  ---


Postcode


State

Country



Help 

Map 

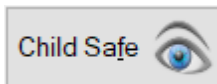
Close 

### Visitation

Load the standard Visitation Request window to request a pastoral visit to the house of the selected individual.

See [Visitation Request](#) for more information

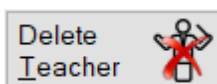
### Child Safe



This button opens up the Child Safe records for the selected Teacher.

See [Child Safe](#) for more information.

### Delete Teacher



Press this to delete the currently displayed teacher. This action cannot be undone.

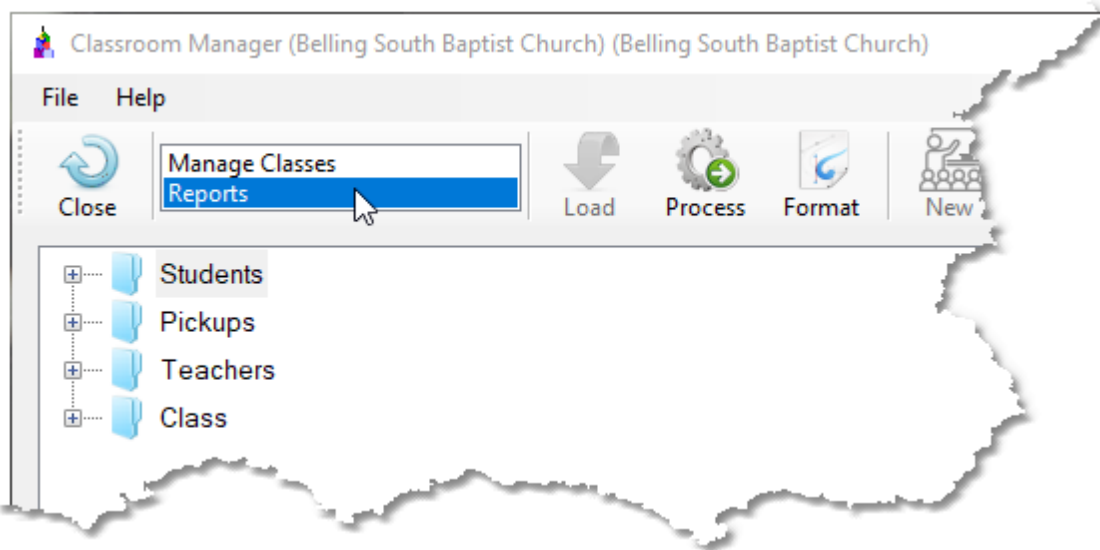
## Classroom Reports

The Classroom Manager reports area can be found by clicking on Reports from the Classroom Manager main form. (See below)

This area has all report outputs including Bar Codes, Lists, Pickups, ID's, Classes etc



Click on each area of the Reports window shown below for more information on each reporting area and function

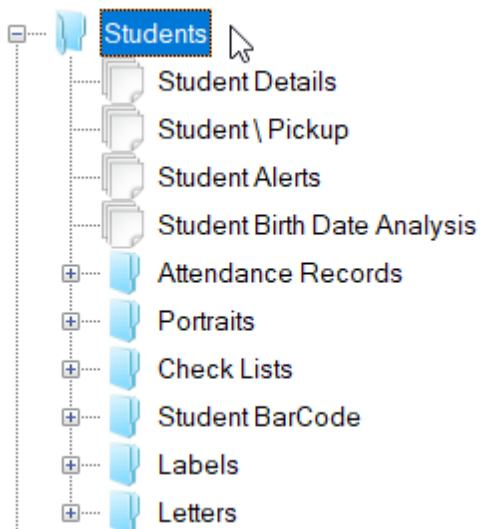


## Students

Shown below is the menu of Student Reports.



Click on each area of the Reports and report categories below to learn more about each report available.



## Student Details

The Student Details report shows basic information about Students.

Before the report runs, there is a [Preflight](#) window that lets you set filters and options for the report

See the Sample [Report](#) to see what this report looks like

## Preflight

This preflight window lets you set filters and report options for the selected report.



Click on each area of the report options window below to learn more about these options

Student Report Options

**Department**

Sunday School

Load All Students in Classes

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

**Load Options**

All Students       Student Visitors in a Class  
 All Students in Class       Students Not in any Class  
 Tag Students before Creating Report

**Filter Students with...**

Medical Alert       Missing Mobile  
 Custody Alert       Missing Email  
 Child Protection Order       Students with No Pickups  
 Family Violence Alert       Students with No Notes  
 Missing a Portrait       Students with Notes

**Student Data to Include in Report**

Alerts       Medical  
 Mobile       Class  
 Email       Student Pickups  
 Home Phone       Visitor Added Date  
 Address       Portrait  
 Birthdate       Notes  
 Title

**Ordered Students By...**

Name       Class

**Student Visitor Added Date Filter**

Enable Date Filtering  
 Friday .24 May 2019  
 To Friday .24 May 2019

**Surname Format**

Use Family Surname  
 Use Individual Surname (if it exists)  
 Show Hidden Individual Surname

Help ?

Cancel ↶

Continue →

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

Department

Sunday School

Load All Students in Classes

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

Select the options for loading in students. If you tick the Tag Students option, you can use a window to manually select individuals to run the report on.

**Load Options**

All Students                       Student Visitors in a Class  
 All Students in Class             Students Not in any Class  
 Tag Students before Creating Report

Tick additional filters by simply selecting a category you want to find in the report.

**Filter Students with...**

Medical Alert                       Missing Mobile  
 Custody Alert                       Missing Email  
 Child Protection Order           Students with No Pickups  
 Family Violence Alert             Students with No Notes  
 Missing a Portrait                 Students with Notes

Select the data fields that you want to display on the report.

**Student Data to Include in Report**

Alerts                                       Medical  
 Mobile                                     Class  
 Email                                       Student Pickups  
 Home Phone                             Visitor Added Date  
 Address                                    Portrait  
 Birthdate                                Notes  
 Title

Select a sort option for this report.

**Ordered Students By...**

Name                       Class

Select the formatting options for Surnames on this report.


**Surname Format**


Use Family Surname  
 Use Individual Surname (if it exists)  
 Show Hidden Individual Surname


This date filter will let you find Visiting Students within the selected date range.

**Student Visitor Added Date Filter**

Enable Date Filtering

Friday .24 May 2019 

To Friday .24 May 2019 

Continue 

Press this to load the selected report.

### Report


Shown below is the sample Student Details Report.

This report can show different types of data depending on the options selected on the [Preflight](#) window

## Students Report


---

Allwright Mandy \ 05/07/2015 \ 054-33-5478



**(Medical Alert)**  
5 Bank St Riddels Creek 3412  
Beginners

Allwright Thomas \ 01/05/2013 \ 054-33-5478



**(Custody Alert)**  
5 Bank St Riddels Creek 3412  
Beginners

Angel Helen \ 05/08/2016 \ 054-22-1199



**(Child Protection Order)**  
12 Water Way Crt Gisborne 3444  
Beginners

### Student Pickup

The Student Pickup report shows selected information about Pickup People with the Students they are assigned to for picking up.

Before the report runs, there is a [Preflight](#) window that lets you set filters and options for the report

See the Sample [Report](#) to see what this report looks like



## Preflight

This preflight window lets you set filters and report options for the selected report.



Click on each area of the report options window below to learn more about these options

**Student Report Options**

Department: Sunday School

Load All Students in Classes

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

**Load Options**

All Students       All Student Visitors

All Students in Class       Students Not in any Class

Tag Students before Creating Report

**Filter Students with...**

Medical Alert       Missing Mobile

Custody Alert       Missing Email

Child Protection Order       Students with No Pickups

Family Violence Alert       Students with No Notes

Missing a Portrait       Students with Notes

**Surname Format**

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

**Student Display Options**

Alerts       Address       Class

Mobile       Birthdate       Portrait

Email       Title       Notes

Home Phone       Medical

**Pickup Display Options**

Portrait       Address       P.I.N.

Mobile       Home Phone       Pickup ID

Email       Title       Notes

Help ?

Cancel ↶

Continue →

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

Department: Sunday School

Load All Students in Classes

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

Select the options for loading in students. If you tick the Tag Students option, you can use a window to manually select individuals to run the report on.

**Load Options**

All Students                       Student Visitors in a Class

All Students in Class               Students Not in any Class

Tag Students before Creating Report

Tick additional filters by simply selecting a category you want to find in the report.

**Filter Students with...**

Medical Alert                       Missing Mobile

Custody Alert                       Missing Email

Child Protection Order           Students with No Pickups

Family Violence Alert               Students with No Notes

Missing a Portrait                   Students with Notes

Select the formatting options for Surnames on this report.

**Surname Format**

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

Select the data you want to display on the report for the Students.

**Student Display Options**

Alerts                       Address                       Class

Mobile                       Birthdate                       Portrait

Email                       Title                       Notes

Home Phone                   Medical


Select the data you want to display on the report for the Pickup person.

**Pickup Display Options**

Portrait                       Address                       P.I.N.

Mobile                       Home Phone                       Pickup ID

Email                       Title                       Notes

Continue 

Press this to load the selected report.

### Report

The Student Pickup report lists the Student first followed by the authorised Pickup people for that student. This report can show different types of data depending on the options selected on the [Preflight](#) window

## Student / Pickup Report

Allwright Mandy

**Address:** 5 Bank St Riddels Creek 3412

**Class:** Beginners, Crusaders

**Pickup**

Allwright Marion

Allwright Stephen



Angel Peter

Allwright Stephen

**Address:** 5 Bank St Riddels Creek 3412

**Pickup**

Nurk Mary (v)



Allwright Thomas

**Address:** 5 Bank St Riddels Creek 3412

### Student Alerts

The Student Alerts Report lists all students that have an Alert. This report is group by Alert Type.

Before the report runs, there is a [Preflight](#) window that lets you set filters and options for the report

See the Sample [Report](#) to see what this report looks like

### Preflight

This preflight window lets you set filters and report options for the selected report.



Click on each area of the report options window below to learn more about these options

Student Report Options

Department  
 Sunday School

Load All Students in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

Load Options

All Students       Student Visitors in a Class  
 All Students in Class       Students Not in any Class  
 Tag Students before Creating Report

Filter Students with...

Medical Alert       Missing Mobile  
 Custody Alert       Missing Email  
 Child Protection Order       Students with No Pickups  
 Family Violence Alert       Students with No Notes  
 Missing a Portrait Image       Students with Notes

Surname Format

Use Family Surname  
 Use Individual Surname (if it exists)  
 Show Hidden Individual Surname

Help ? Cancel Continue

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

Department  
 Sunday School

Load All Students in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

Select the options for loading in students. If you tick the Tag Students option, you can use a window to manually select individuals to run the report on.

Load Options

All Students       Student Visitors in a Class  
 All Students in Class       Students Not in any Class  
 Tag Students before Creating Report

Tick additional filters by simply selecting a category you want to find in the report.

Filter Students with...

<input type="checkbox"/> Medical Alert	<input type="checkbox"/> Missing Mobile
<input type="checkbox"/> Custody Alert	<input type="checkbox"/> Missing Email
<input type="checkbox"/> Child Protection Order	<input type="checkbox"/> Students with No Pickups
<input type="checkbox"/> Family Violence Alert	<input type="checkbox"/> Students with No Notes
<input type="checkbox"/> Missing a Portrait	<input type="checkbox"/> Students with Notes


Select the formatting options for Surnames on this report.

Surname Format

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

Continue 

Press this to load the selected report.

### Report

Shown below is the Student Alerts Report

Students Alerts	
<b>Medical Alert</b>	<b>Total: 2</b>
Allwright Mandy Dean Heather (v)	
<b>Custody Alert</b>	<b>Total: 3</b>
Allwright Mandy Allwright Thomas Anglin Levi	
<b>Child Protection Order Alert</b>	<b>Total: 2</b>
Allwright Mandy Angel Helen	
<b>Family Violence Alert</b>	<b>Total: 2</b>
Allwright Mandy Anglin Kerry	

### Student Birth Date Analysis

The Student Birth Date analysis Report includes an Age Analysis with tables, charts and Graphs to help you see how old the students are in Classroom Manager.

Before the report runs, there is a [Preflight](#) window that lets you set filters and options for the report

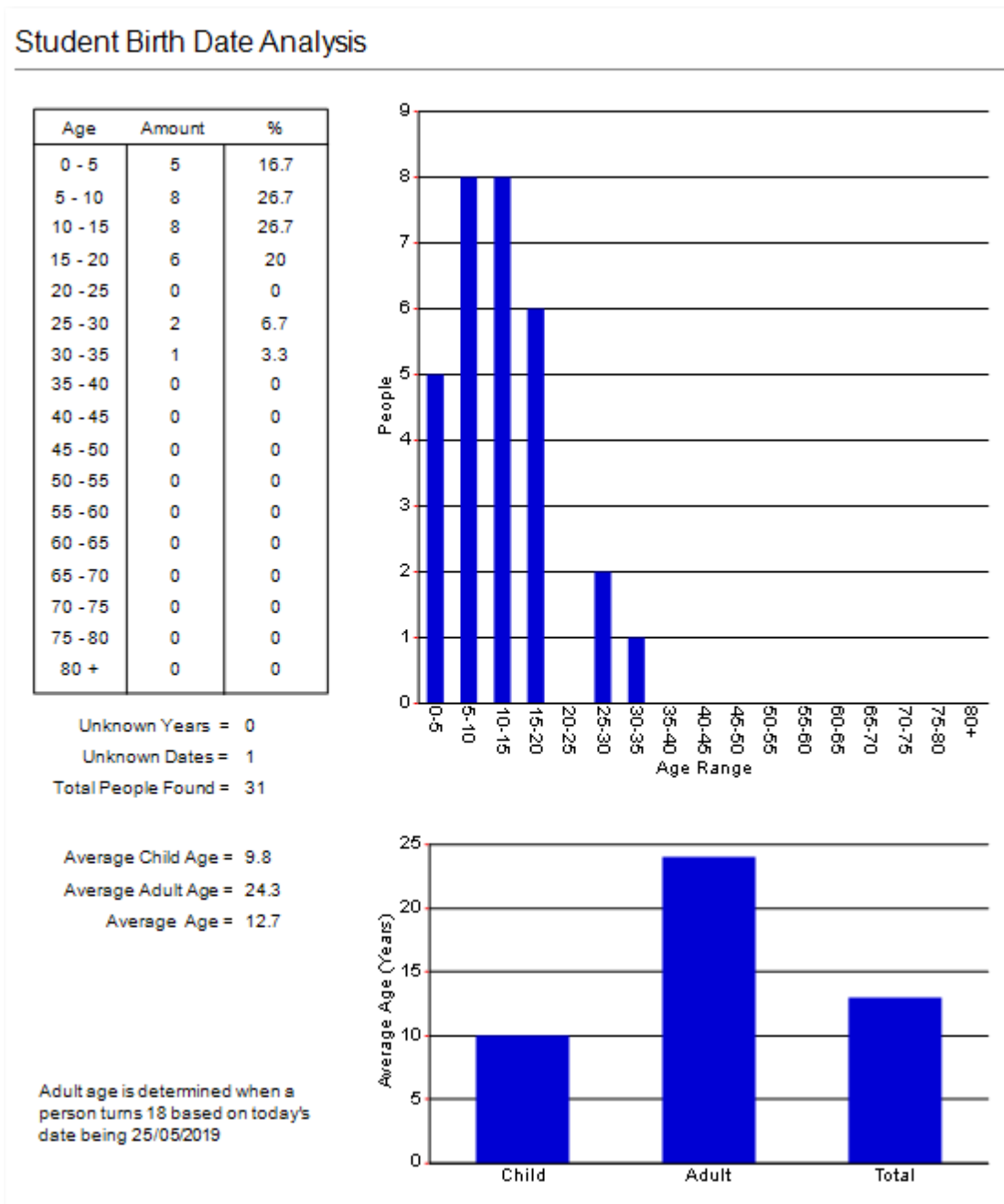
See the Sample [Report](#) to see what this report looks like

#### Preflight

See Student Alerts [Preflight](#) window which is similar to the preflight window for Student Birthdate Analysis.

#### Report

Shown below is a sample Birthdate Analysis report.

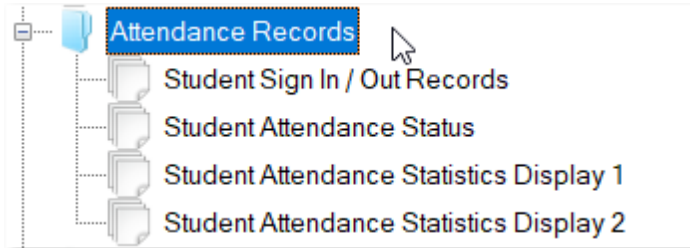


## Attendance Reports

The Attendance reports concentrate on the Sign In / Sign Out records indicating attendance at classes by students.



Click on each report listed below to find out more about each report.



### Student Sign In Sign Out Records

This report is an ideal auditing report. It lists all sign in and sign out records for the selected filters and dates in the [Preflight](#) settings window.

Before the report runs, there is a [Preflight](#) window that lets you set filters and options for the report

See the Sample [Report](#) to see what this report looks like

The Preflight window for Student Sign in and Sign Out records report is shown below.



Click on each area of the report options window below to learn more about these options

Student Attendance Report Options

Department: Sunday School

Load All Students in Classes

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

Filter Students with...

- Medical Alert
- Custody Alert
- Child Protection Order
- Family Violence Alert

Surname Format

- Use Family Surname
- Use Individual Surname (if it exists)
- Show Hidden Individual Surname

Order Records By

- Class
- Date \ Time In

Tag Students before Creating Report

Records to Load

Specific Date

Dates Attached to: All Departments

06/01/2019  
08/09/2018

Date Range

Saturday .25 May 2019

To: Saturday .25 May 2019

Help ? Cancel Continue

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

Tick additional filters by simply selecting a category you want to find in the report.

Select the formatting options for Surnames on this report.

Select the Sort Order for the report.

Ticking this option lets you further filter the report to just selected students.

Tag Students before Creating Report

Chose to use just a specific date from all departments, or select a Department to select dates from that have records for that department.



Select a Single Date to report on. Or use the [Date Range](#) option to load more dates into your report.

06/01/2019

08/09/2018

Select a date range to show Sign In / Sign Out records for a larger range.

Date Range

Saturday 25 May 2019

To Saturday 25 May 2019

Continue

Press this to load the selected report.  
 This report is an ideal auditing report. It lists all sign in and sign out records for the selected filters and dates in the [Preflight](#) settings window.

### Student Attendance for 06/01/2019

Class	Date	Time In	Time Out	Drop Off	Pick Up
<b>Allwright Mandy</b>					
Beginners	06/01/2019	9:00 AM	10:30 AM	Stephen Allwright	Stephen Allwright
<b>Allwright Thomas</b>					
Beginners	06/01/2019	9:00 AM	10:30 AM	Thomas Allwright	Thomas Allwright
<b>Angel Helen</b>					
Beginners	06/01/2019	9:00 AM	10:30 AM		
<b>Anglin Kerry</b>					
Kingdom Kids	06/01/2019	9:00 AM	10:30 AM		
<b>Anglin Levi</b>					
Beginners	06/01/2019	9:00 AM	10:30 AM		
<b>Anglin Mathew</b>					
Beginners	06/01/2019			Mary Nurk	
<b>Barton Ernie</b>					
Kingdom Kids	06/01/2019	9:00 AM	10:30 AM		
<b>Barton Karren</b>					
Kingdom Kids	06/01/2019	9:00 AM	10:30 AM		
<b>Blackby Frank</b>					

### Student Attendance Status

This report is an ideal auditing report. It lists all Students within the date range, and shows the status of their attendance.

Such As:

- Signed in and Out
- Only Signed In
- Only Signed Out
- Neither Signed in OR Out

Before the report runs, there is a [Preflight](#) window that lets you set filters and options for the report

See the Sample [Report](#) to see what this report looks like

Check out the [Preflight](#) for the Student Sign In / Sign Out report.

This report is an ideal auditing report. It lists all Students within the date range, and shows the status of their attendance.

<b>Student Attendance Status for 06/01/2019</b>	
<b>Students Signed Both In and Out</b>	<b>Total = 20</b>
Beginners \ Allwright Mandy	
Beginners \ Allwright Thomas	
Beginners \ Anglin Levi	
Beginners \ Dean Heather (v)	
Kingdom Kids \ Anglin Kerryn	
Kingdom Kids \ Barton Ernie	
Kingdom Kids \ Barton Karren	
Kingdom Kids \ Blackeby Frank	
Kingdom Kids \ Blackeby Heather	
Crusaders \ Brown John	
Crusaders \ Brown Joshua	
Crusaders \ Chapman Hannah	
Crusaders \ Collins Stephen	
Crusaders \ Dimsey Sarah	
Classmates for Christ \ Dimsey Dodie	
Classmates for Christ \ Dimsey Karren	
Classmates for Christ \ Dimsey Mandy	
Classmates for Christ \ Jones Jill	
Classmates for Christ \ Jones Ryan	
Classmates for Christ \ Knight Michaela	
<b>Students Only Signed In</b>	<b>Total = 0</b>
<b>Students Only Signed Out</b>	<b>Total = 0</b>
<b>Students Not Signed In or Signed Out</b>	<b>Total = 6</b>
Beginners \ Anglin Mathew	
Beginners \ Taylor Bradd	
Kingdom Kids \ Allwright Thomas	
Kingdom Kids \ Angel Helen	
Crusaders \ Allwright Mandy	

#### Student Attendance Statistics Display 1

This statistical report shows the percentage attendance of each student on the report between selected date ranges.

Before the report runs, there is a [Preflight](#) window that lets you set filters and options for the report

See the Sample [Report](#) to see what this report looks like  
 This preflight window lets you set filters and report options for the selected report.



Click on each area of the report options window below to learn more about these options

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

Tick additional filters by simply selecting a category you want to find in the report.

Filter Students with...

Medical Alert

Custody Alert

Child Protection Order

Family Violence Alert

Select the formatting options for Surnames on this report.

Surname Format

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

Ticking this option lets you further filter the report to just selected students.

Tag Students before Creating Report

Ticking this option removes all students with no attendance data.

Ignore Students with zero values


Use the Records to Load area to filter down to a single Department, or All Departments, then select the FROM and TO dates for the report to run between.

Records to Load

Dates Attached to

Date From...

Date To...

Continue 

Press this to load the selected report.

This Statistical Report shows the percentage attended on the basis of a Sign in / Sign Out record for each student.

Student Attendance Statistics Between 08/09/2018 And 06/01/2019 (2 Records)			
	Total	Percentage	
<b>Beginners</b>			
	1	50%	Allwright Mandy
	1	50%	Allwright Thomas
	1	50%	Anglin Levi
	0	0%	Anglin Mathew
	0	0%	Dean Heather (v)
	0	0%	Taylor Bradd
<b>Kingdom Kids</b>			
	0	0%	Allwright Thomas
	0	0%	Angel Helen
	1	50%	Anglin Kerry
	1	50%	Barton Ernie
	1	50%	Barton Karren
	1	50%	Blackeby Frank
	1	50%	Blackeby Heather
<b>Crusaders</b>			
	0	0%	Allwright Mandy
	0	0%	Allwright Thomas
	1	50%	Brown John
	1	50%	Brown Joshua
	1	50%	Chapman Hannah
	1	50%	Collins Stephen
	1	50%	Dimsey Sarah

### Student Attendance Statistics Display 2

This statistical report shows the percentage attendance of each student on the report between selected date ranges.

Before the report runs, there is a [Preflight](#) window that lets you set filters and options for the report

See the Sample [Report](#) to see what this report looks like

The [Preflight](#) window for Student Attendance Statistics Display 2 is the same as for Student Attendance Statistics Display 1.

This Statistical Report shows the percentage attended on the basis of a Sign in / Sign Out record for each student. It also shows the number of attendances in the Total Column.

### Student Attendance Statistics Between 08/09/2018 And 06/01/2019 (2 Records)

Total	Percentage	
1	50%	Beginners \ Allwright Mandy
1	50%	Beginners \ Allwright Thomas
1	50%	Beginners \ Anglin Levi
0	0%	Beginners \ Anglin Mathew
0	0%	Beginners \ Dean Heather (v)
0	0%	Beginners \ Taylor Bradd
0	0%	Kingdom Kids \ Allwright Thomas
0	0%	Kingdom Kids \ Angel Helen
1	50%	Kingdom Kids \ Anglin Kerryn
1	50%	Kingdom Kids \ Barton Ernie
1	50%	Kingdom Kids \ Barton Karren
1	50%	Kingdom Kids \ Blackeby Frank
1	50%	Kingdom Kids \ Blackeby Heather

#### Portraits

The Students Portraits Reports all show basic student information, and a picture if available.

There are 3 report styles, being 5 Column, 4 Column or 3 Column. See [Reports](#) for a sample.

#### Preflight

The Preflight options for this report are the same for each Portrait report.



Click on each area of the report options window below to learn more about these options

**Student Report Options**

Department  
 Sunday School

Load All Students in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

**Load Options**

All Students       Student Visitors in a Class  
 All Students in Class       Students Not in any Class  
 Tag Students before Creating Report

**Filter Students with...**

Medical Alert       Missing Mobile  
 Custody Alert       Missing Email  
 Child Protection Order       Students with No Pickups  
 Family Violence Alert       Students with No Notes  
 Missing a Portrait Image       Students with Notes

**Portrait Options**

Only Display Students with Portraits  
 Reverse Surname / Given Name positions

**Surname Format**

Use Family Surname  
 Use Individual Surname (if it exists)  
 Show Hidden Individual Surname

Help ? Cancel ↶ Continue →

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

Department  
 Sunday School

Load All Students in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

Select the options for loading in students. If you tick the Tag Students option, you can use a window to manually select individuals to run the report on.

## Load Options

- All Students                       Student Visitors in a Class  
 All Students in Class               Students Not in any Class  
 Tag Students before Creating Report

Tick additional filters by simply selecting a category you want to find in the report.

## Filter Students with...

- Medical Alert                       Missing Mobile  
 Custody Alert                       Missing Email  
 Child Protection Order           Students with No Pickups  
 Family Violence Alert            Students with No Notes  
 Missing a Portrait                  Students with Notes

Select options to control the display of portraits, and the location of Surnames and Given Names.


## Portrait Options

- Only Display Students with Portraits  
 Reverse Surname / Given Name positions

Select the formatting options for Surnames on this report.

## Surname Format

- Use Family Surname  
 Use Individual Surname (if it exists)  
 Show Hidden Individual Surname

Continue 







Press this to load the selected report.



## Reports

Shown below is a 3 column sample Portrait Report.

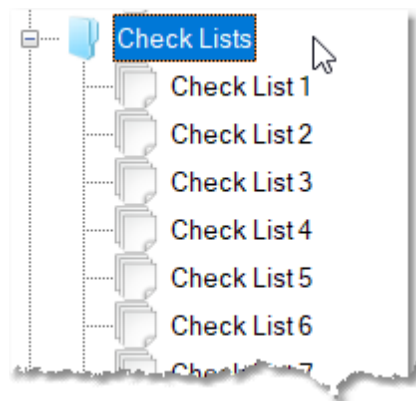
### Students Portrait Report

		
Allwright Mandy	Allwright Stephen	Allwright Thomas
		
Angel Helen	Angel Peter	Anglin Kerryn

## Check Lists

There are 17 different check lists. Each check list uses the same preflight form for filters and options on what to display.

[See Preflight](#) for information on the report options.

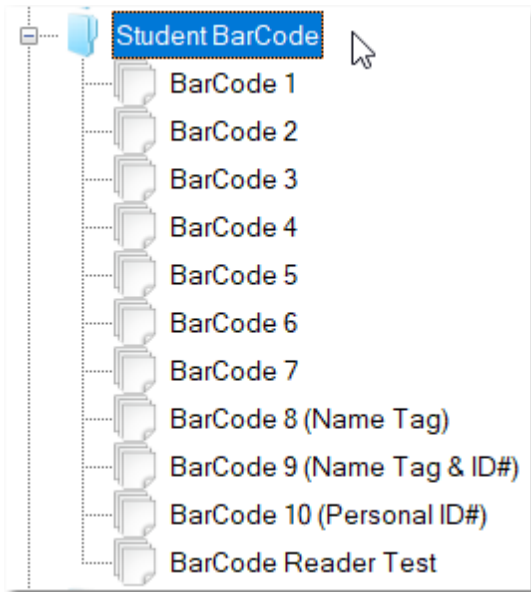


## Student Bar Code

Student Bar Code reports can be used to create Name Tags and lists for managing Sign In / Sign Out procedures using a Bar Code Scanner

Included in this list of reports is the Bar Code Reader Test report. You can use this to test your scanner. Instructions and information are printed on the report.

[See Preflight](#) for information on the report options.



### Labels

The Label Reports can be used to create Mailing Labels or Name Tags for managing Sign In / Sign Out procedures.

[See Preflight](#) for information on the report options

See the settings area for [Mailing Labels](#) and [Name Tags](#) for information on how to set the size and number of labels you have on your sheet of Labels or Name Tags.



### Letters

The Letters Reports list comprises of your [Custom Letter Writer](#) letter templates.

These can be run from Classroom Manager to print out letters you have created in Custom Letters.

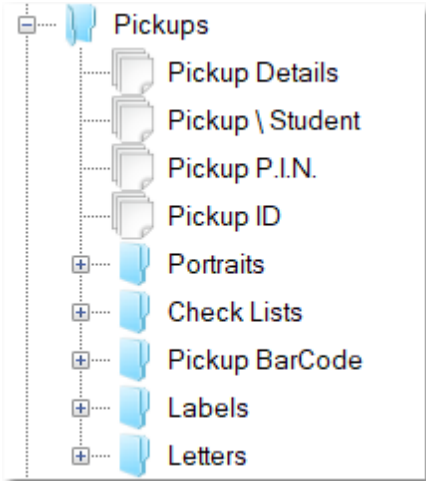
[See Preflight](#) for information on the report options that can filter the people to go on the report template.

### Pickups

Shown below is the menu of Pickup Reports.



Click on each area of the Reports and report categories below to learn more about each report available.



**Pickup Details**

The Pickup Details [Report](#) will print out a list of Pickup People based on the [Preflight](#) settings for this report.

**Preflight**

Shown here are the preflight settings for controlling a number of Pickup Reports.



Click on each area of the report options window below to learn more about these options

**Pickup Report Options**

**Department**

All Pickups with Students in any Class

Sunday School

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

**Load Options**

All Pickups

Pickups with Student in Class

Pickup Visitors

No Students Attached

Tag Pickups before Creating Report

**Surname Format**

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

**Filter Pickup with...**

Missing Mobile       Missing a Portrait

Missing Email       Missing P.I.N.

**Pickup Data to Include in Report**

Mobile       Pickup ID

Email       Visitor Added Date

Home Phone       Pickup Students

Address       Portrait

Title       Notes

P.I.N.

**Order Student By...**

Name       Class       Display Pickup Students attached to all Classes

**Pickup Visitor Added Date Filter**

Enable Date Filtering

Sunday .26 May 2019

To Sunday .26 May 2019

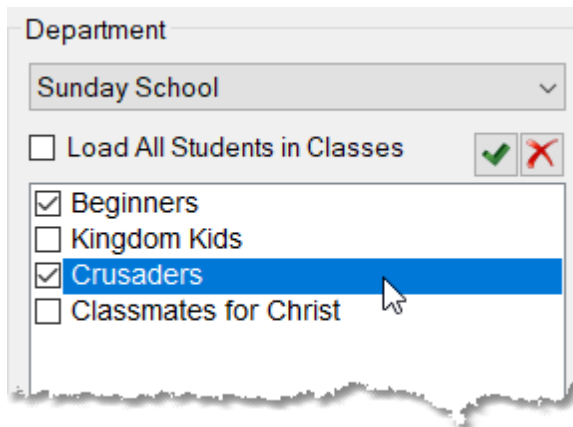
Help ?

Cancel ↶

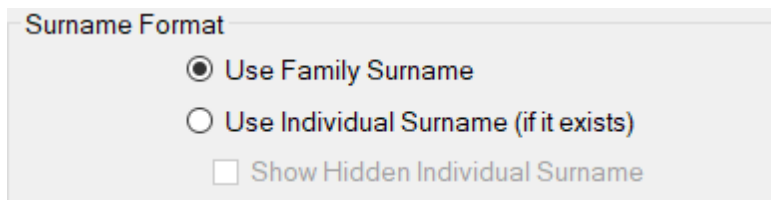
**Continue** →

When available, you can manually select departments and classes to be included on the report.

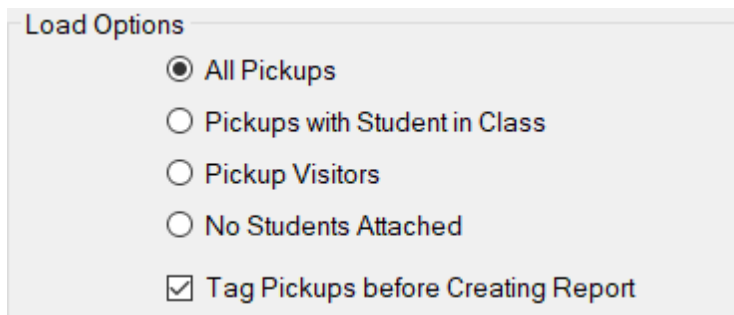
Or you can tick the Load All option to include all people on the report.



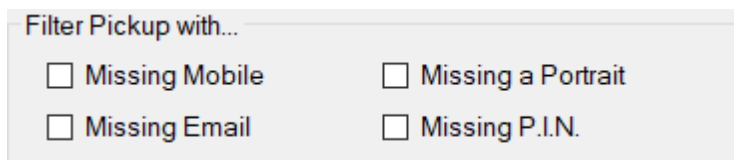
Select the formatting options for Surnames on this report.



Select the options for loading in Pickups. If you tick the Tag Pickups option, you can use a window to manually select individuals to run the report on.



Filter your report to find people with any combination of the following data missing.



If you do not tick any options here, your report will just be a list of names. Tick the added data that you want to display on the report for each pickup person loaded.

**Pickup Data to Include in Report**

<input checked="" type="checkbox"/> Mobile	<input checked="" type="checkbox"/> Pickup ID
<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Visitor Added Date
<input checked="" type="checkbox"/> Home Phone	<input checked="" type="checkbox"/> Pickup Students
<input checked="" type="checkbox"/> Address	<input checked="" type="checkbox"/> Portrait
<input checked="" type="checkbox"/> Title	<input checked="" type="checkbox"/> Notes
<input checked="" type="checkbox"/> P.I.N.	

Set the sort order for any students displayed on the report.


**Order Student By...**

Name   
 Class   
 Display Pickup Students attached to all Classes

Enable this option to filter your report to find visiting pickup people who were visitors on a specific date. (The date they were added as a visitor)

**Pickup Visitor Added Date Filter**

Enable Date Filtering

Continue 

Press this to load the selected report.


### Report

Shown below is a sample Pickup Details Report.

This report has all data options ticked for display, and as such also shows the students that are assigned to Stephen Allwright for him to pickup.

**Pickups Report**

Allwright Mr. Stephen \ 0400-123-456 \ stephen@spirit.net.au \ 054-33-5478

 5 Bank St Riddels Creek 3412  
Allwright Mandy (Medical Alert) (Custody Alert) (Family Protection Order) (Family Violence Alert)  
Barton Ernie  
Pickup ID = 2

### Pickup Student

The Pickup Student [Report](#) shows the people who are picking up students, as well as the students themselves.

## Preflight

Shown here are the preflight settings for the Pickup Student report.



Click on each area of the report options window below to learn more about these options

Pickup Report Options

Department  
Sunday School

Load All Students in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

Load Options

All Pickups  
 Pickups with Student in Class  
 Pickup Visitors  
 No Students Attached  
 Tag Pickups before Creating Report

Filter Pickup with...

Missing Mobile  Missing a Portrait  
 Missing Email  Missing P.I.N.

Surname Format

Use Family Surname  
 Use Individual Surname (if it exists)  
 Show Hidden Individual Surname

Pickup Display Options

Mobile  Address  Pickup ID  
 Email  Title  Portrait  
 Home Phone  P.I.N.  Notes

Student Display Options

Alerts  Address  Class  
 Mobile  Birthdate  Portrait  
 Email  Title  Notes  
 Home Phone  Medical

Help ?  
Cancel  
Continue

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

Department  
Sunday School

Load All Students in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

Select the options for loading in Pickups. If you tick the Tag Pickups option, you can use a window to manually select individuals to run the report on.

**Load Options**

All Pickups

Pickups with Student in Class

Pickup Visitors

No Students Attached

Tag Pickups before Creating Report

Filter your report to find people with any combination of the following data missing.

**Filter Pickup with...**

Missing Mobile       Missing a Portrait

Missing Email       Missing P.I.N.

Select the formatting options for Surnames on this report.

**Surname Format**

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

Tick the options for data to include on the report for Pickup People

**Pickup Display Options**

Mobile       Address       Pickup ID

Email       Title       Portrait

Home Phone       P.I.N.       Notes

Tick the options for data to include on the report for Students


**Student Display Options**

Alerts       Address       Class

Mobile       Birthdate       Portrait

Email       Title       Notes

Home Phone       Medical


Continue 

Press this to load the selected report.


### Report

Shown below is a sample Pickup Student Report. This is shown with a few data options ticked on the [Preflight](#) window, and you can see the pickup person is Stephen and he is picking up Mandy and Ernie. The students are set in from the left to help distinguish them on the report.

Allwright Stephen




**Mobile:** 0400-123-456  
**Email:** stephen@spirit.net.au  
**Home Ph:** 054-33-5478



---


— Students —

Allwright Mandy



**Alerts:** (Medical Alert) (Custody Alert) (Child Protection Order)  
 (Family Violence Alert)  
**Mobile:** 0400-123456  
**Class:** Beginners, Crusaders

Barton Ernie



**Class:** Kingdom Kids

### Pickup PIN

This report shows the PICKUP PIN numbers assigned to Pickup People

See [PIN Filters](#) for the options available for this report.

### Reports

This report shows the PICKUP PIN numbers assigned to Pickup People

## Pickups P.I.N. Report

P.I.N.	
3636	Angel Peter
4000	Anglin Brent
58	Anglin Katey
1962	Anglin Mathew
1974	Barton Ethel
sss	Barton Ray
12345	fred nurk (v)

### Pickup ID

The Pickup ID report is a list of Pickup People and the ID they have for being an authorised pickup.

### Preflight

Shown below is the PICKUP ID Filters window. This is used to set options for the Pickup ID [Report](#)



Click on each area of the report options window below to learn more about these options



Pickup ID Filters

Department

All Pickups with Students in any Class

Sunday School

Beginners

Kingdom Kids

Crusaders

Classmates for Christ

Load Options

All Pickups

Pickups with Student in Class

Pickup Visitors

No Students Attached

Surname Format

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

Pickup Options

Only Display Pickups with a Pickup ID

Help  Cancel  Continue

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

Department

Sunday School

Load All Students in Classes

Beginners

Kingdom Kids

Crusaders

Classmates for Christ

Select the options for loading in Pickup people. The Tag Pickup tick box when ticked lets you manually tick people from a list of who you want on the report.

## Load Options

- All Pickups
- Pickups with Student in Class
- Pickup Visitors
- No Students Attached
- Tag Pickups before Creating Report

Select the formatting options for Surnames on this report.

## Surname Format

- Use Family Surname
- Use Individual Surname (if it exists)
- Show Hidden Individual Surname

Tick this option to limit the report to ONLY people with a Pickup ID

## Pickup Options

- Only Display Pickups with a Pickup ID

Continue



Press this to load the selected report.

**Report**

Shown below is a sample Pickup ID report. This is a list of Pickup People and the ID they have for being an authorised pickup.

## Pickups Pickup ID Report

Pickup ID	
ALL-1	Allwright Mandy
1	Allwright Marion
2	Allwright Stephen
All-Thom	Allwright Thomas
3	Angel Peter
4	Anglin Brent
5	Anglin Katey
6	Anglin Mathew

**Portraits**

The Pickup Portraits Reports all show basic Pickup Person information, and a picture if available.

Checkout the [Preflight](#) options to adjust the information and filtering for this report style.

There are 3 [Report](#) styles, being 5 Column, 4 Column or 3 Column. See [Reports](#) for a sample.

## Preflight

Shown below is the report options window for Pickup - Portrait reports.



Click on each area of the report options window below to learn more about these options

**Pickup Report Options**

**Department**

All Pickups with Students in any Class

Sunday School ▼

✔ ✕

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

**Load Options**

All Pickups

Pickups with Student in Class

Pickup Visitors

No Students Attached

Tag Pickups before Creating Report

**Portrait Options**

Only Display Pickups with Portraits

Reverse Surname / Given Name positions

**Surname Format**

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

Help ?
Cancel ↩
Continue ➡

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

**Department**

Sunday School ▼

Load All Students in Classes ✔ ✕

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

Select the options for loading in Pickup people. The Tag Pickup tick box when ticked lets you manually tick people from a list of who you want on the report.

**Load Options**

All Pickups

Pickups with Student in Class

Pickup Visitors

No Students Attached

Tag Pickups before Creating Report

Tick the options to further control the Portrait reports.

**Portrait Options**

Only Display Pickups with Portraits

Reverse Surname / Given Name positions


Select the formatting options for Surnames on this report.

**Surname Format**

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

Continue 

Press this to load the selected report.

### Report

Shown below is a sample Pickup Portrait report, this shows the pickup people that you have selected to see based on the [Preflight](#) options and filters for this report. This report is available in 3 4 and 5 column styles.

### Pickup Portrait Report



Blackeby  
Heather



Chapman  
Ruth



Nurk  
Mary (v)

## Check Lists

There are 17 different check lists available. To see what they look like, select one in the list an a report preview is shown on the right hand side of the screen.

Each report has a standard set of filters and options available to them, and these can are shown in the Check List [Preflight](#) area.

## Preflight

Shown below are the pre-flight report and filter options for the Classroom Manager Check List reports.



Click on each area of the report options window below to learn more about these options

**Pickup Report Options**

**Department**

All Pickups with Students in any Class

Sunday School v

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

**Load Options**

All Pickups

Pickups with Student in Class

Pickup Visitors

No Students Attached

Tag Pickups before Creating Report

**Filter Pickup with...**

Missing Mobile       Missing a Portrait Image

Missing Email       Missing P.I.N.

**Surname Format**

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

Help 
Cancel 
Continue

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

Select the options for loading in Pickup people. The Tad Pickup tick box when ticked lets you manually tick people from a list of who you want on the report.

Select the formatting options for Surnames on this report.

Tick any option to limit the report to ONLY people with selected missing information

Press this to load the selected report.

### Report

Shown below is one sample check list report. There are 17 of them that are all formatted differently for different needs.

## Check List 5

Allwright	Mandy		
Allwright	Marion		
Allwright	Stephen		
Allwright	Thomas		
Angel	Helen		
Angel	Peter		
Anglin	Brent		
Anglin	Katey		
Anglin	Mathew		
Barton	Eth		

### Pickup Barcode

The Pickup Barcode reports can be used for scanning people at the pickup point when a student is picked up.

There are a number of reports to assist with this, and we will not be showing them, as there are 11 different reports.

Any Name Tag type BarCode report will use the standard Name Tag sizes setup in the [Setup - Global](#) area for Name Tags

Each report uses a standard pre-flight settings window that can be seen [here](#).

### Labels

The Pickup Label reports can be used for Printing out Mailing Labels or Name Tags of pickup people.

Any Name Tag type BarCode report will use the standard Name Tag sizes setup in the [Setup - Global](#) area for Name Tags

Each report uses a standard pre-flight settings window that can be seen [here](#).

### Letters

The Letters reports are [Custom Letter Writer](#) reports that you have created.

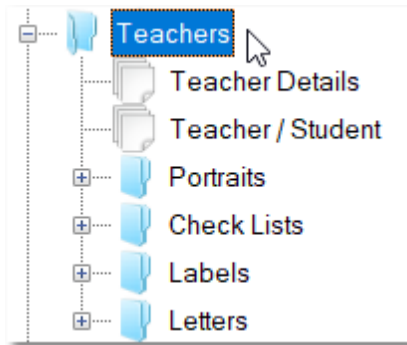
Each report uses a standard pre-flight settings window that can be seen [here](#).

### Teachers

Shown below is the menu of Teacher Reports.



Click on each area of the Reports and report categories below to learn more about each report available.



### Teacher Details

The Teacher Details Report can display all information about the teacher. Including Names, Phones, Email, Address, Class, Notes and more

Each Teacher report is controlled by a [Preflight](#) settings window that allows you to choose different filters and the level of data you want to see on the report.

A sample report can be seen [here](#).

### Preflight

Shown below is the report options window for the Teacher Details Report options



Click on each area of the report options window below to learn more about these options



**Teachers Report Options**

Department  
Sunday School

Load All Teachers in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

Surname Format  
 Use Family Surname  
 Use Individual Surname (if it exists)  
 Show Hidden Individual Surname

Load Options  
 All Teachers  
 Teachers in Class  
 Teachers Not in a Class  
 Tag Teachers before Creating Report

Filter Teachers with...  
 Missing Mobile  
 Missing Portrait  
 Missing Email

Teacher Data to Include in Report  
 Mobile  
 Class  
 Email  
 Notes  
 Home Phone  
 Students  
 Address  
 Portrait  
 Title

Order Teachers By...  
 Name  
 Class

Help ? Cancel Continue

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

Department  
Sunday School

Load All Students in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

Select the options for loading in Teachers. The Tag Pickup tick box when ticked lets you manually tick people from a list of who you want on the report.

**Load Options**

All Teachers

Teachers in Class

Teachers Not in a Class

Tag Teachers before Creating Report

Select any of these filters to find teachers with missing data.

**Filter Teachers with...**

Missing Mobile       Missing Portrait

Missing Email

Tick the data options to include on the report for each teacher found.

**Teacher Data to Include in Report**

Mobile       Class

Email       Notes

Home Phone       Students

Address       Portrait

Title

Choose to order the report by the Teachers Name, or the Class they are teaching in.

**Order Teachers By...**

Name       Class


Select the formatting options for Surnames on this report.

**Surname Format**

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

Continue 

Press this to load the selected report.

**Report**

Shown below is a sample Teachers Report with most of the data turned on.

## Teachers Report

---

Allwright Mr. Stephen \ 041234567890 \ stephen@spirit.net.au \ 054-33-5478



5 Bank St Riddels Creek 3412  
 Young Adults  
 Young Adults \ Knight Laura  
 Young Adults \ Knight Mathew  
 Young Adults \ Knight Rachael  
 Young Adults \ McCoy David  
 Young Adults \ McCoy Kylie

Angel Belinda \ 041234567890 \ angel@spirit.com.au \ 054-22-1199



12 Water Way Crt Gisborne 3444  
 Kingdom Kids  
 Kingdom Kids \ Anglin Kerryn (Family Violence Alert)  
 Kingdom Kids \ Barton Ernie  
 Kingdom Kids \ Barton Karren  
 Kingdom Kids \ Blackeby Frank  
 Kingdom Kids \ Blackeby Heather

Barton Dr. Ray \ 041234567890 \ ray@spirit.com.au \ 03-744-1222



8 King St Sunbury 3099  
 Classmates for Christ  
 Classmates for Christ \ Dimsey Dodie  
 Classmates for Christ \ Dimsey Karren  
 Classmates for Christ \ Dimsey Mandy  
 Classmates for Christ \ Dimsey Nathan

**Teacher / Student**

The Teacher Student report is a report that can contain alot of data on it. The amount of data is controlled by the [Preflight](#) options, which includes fields to include as well as filters.

See the Sample Report [Here](#)

**Preflight**

Shown below is the report options window for the Teacher / Student Report



Click on each area of the report options window below to learn more about these options

Teacher Report Options

Department  
 Sunday School

Load All Students in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

Load Options

All Teachers  
 Teachers in Class  
 Teachers Not in a Class

Tag Pickups before Creating Report

Filter Teacher with...

Missing Mobile  Missing a Portrait  
 Missing Email

Surname Format

Use Family Surname  
 Use Individual Surname (if it exists)  
 Show Hidden Individual Surname

Teacher Display Options

Mobile  Address  Notes  
 Email  Title  Portrait  
 Home Phone  Class

Student Display Options

Alerts  Address  Class  
 Mobile  Birthdate  Portrait  
 Email  Title  Notes  
 Home Phone  Medical

Help ?  
 Cancel  
 Continue

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

Department  
 Sunday School

Load All Students in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

Select the options for loading in Teachers. The Tag Pickup tick box when ticked lets you manually tick people from a list of who you want on the report.

Load Options

All Teachers  
 Teachers in Class  
 Teachers Not in a Class

Tag Teachers before Creating Report

Select any of these filters to find teachers with missing data.

Filter Teachers with...

Missing Mobile       Missing Portrait

Missing Email

Select the formatting options for Surnames on this report.

Surname Format

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

Tick the data options to include on the report for each teacher found.

Teacher Display Options

Mobile       Address       Notes

Email       Title       Portrait

Home Phone       Class

Tick the data options to include on the report for each student found.

Student Display Options

Alerts       Address       Class

Mobile       Birthdate       Portrait


Email       Title       Notes

Home Phone       Medical

Choose to order the report by the Teachers Name, or the Class they are teaching in.

Order Teachers By...

Name       Class

Continue 

Press this to load the selected report.

### Report

Shown below is a sample Teacher / Student report. The students are indented for each teacher showing the relationship between teacher and student.

## Teacher / Student Report

Allwright Mr. Stephen



**Address:** 5 Bank St Riddels Creek 3412  
**Mobile:** 041234567890  
**Class:** Young Adults  
**Home Ph:** 054-33-5478

### Students

Knight Laura



**Address:** 89 Jack St Keilor Heights 3191  
**BirthDate:** 03/01/2008    **Age:** 10 years  
**Class:** Young Adults

Knight Mathew



**Address:** 89 Jack St Keilor Heights 3191  
**BirthDate:** 05/08/2010    **Age:** 7 years  
**Class:** Young Adults

Knight Rachael



**Address:** 89 Jack St Keilor Heights 3191  
**BirthDate:** 04/05/2005    **Age:** 12 years  
**Class:** Young Adults

### Portraits

The Teacher Portraits Reports all show basic Teacher information, and a picture if available.

Checkout the [Preflight](#) options to adjust the information and filtering for this report style.

There are 3 [Report](#) styles, being 5 Column, 4 Column or 3 Column.

### Preflight

Shown below is the report options window for Teacher - Portrait reports (And check list reports)



Click on each area of the report options window below to learn more about these options

**Teachers Report Options**

Department  
 Sunday School

Load All Teachers in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

**Load Options**

All Teachers  
 Teachers in Class  
 Teachers Not in a Class

Tag Pickups before Creating Report

**Filter Teachers with...**

Missing Mobile  Missing Portrait  
 Missing Email

**Portrait Options**

Only Display Teachers with Portraits  
 Reverse Surname / Given Name positions

**Surname Format**

Use Family Surname  
 Use Individual Surname (if it exists)  
 Show Hidden Individual Surname

Help ? Cancel Continue

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

Department  
 Sunday School

Load All Students in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

Select the options for loading in Teachers. The Tag Pickup tick box when ticked lets you manually tick people from a list of who you want on the report.

**Load Options**

All Teachers

Teachers in Class

Teachers Not in a Class

Tag Teachers before Creating Report

Select any of these filters to find teachers with missing data.

**Filter Teachers with...**

Missing Mobile       Missing Portrait

Missing Email

Tick the options to further control the Portrait reports.

**Portrait Options**

Only Display Pickups with Portraits

Reverse Surname / Given Name positions


Select the formatting options for Surnames on this report.

**Surname Format**

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname


Continue 






Press this to load the selected report.

### Report

Shown below is a sample Teacher Portrait report, this shows the Teachers that you have selected to see based on the [Preflight](#) options and filters for this report. This report is available in 3 4 and 5 column styles.

**Teacher Portrait Report**



				
Allwright Stephen	Angel Belinda	Barton Ray	Chapman Ruth	Iles Wendy

### Check Lists

There are 17 different check lists available for Teachers. To see what they look like, select one in the list and a report preview is shown on the right hand side of the screen.

Each report has a standard set of filters and options available to them, and these can be shown in the Check List [Preflight](#) window.



As there are 17 different reports for Teacher Check Lists, we have shown here a single sample [Report](#)

### Report

Shown below is one sample check list report. There are 17 of them that are all formatted differently for different needs.

### Check List 5

Allwright	Mandy		
Allwright	Marion		
Allwright	Stephen		
Allwright	Thomas		
Angel	Helen		
Angel	Peter		
Anglin	Brent		
Anglin	Katey		
Anglin	Mathew		
Boston	Eth		

### Pre Flight

The preflight options for the teacher check list reports are the same as the the [Preflight](#) window for Portrait Reports.

### Labels

The Teacher Label reports can be used for Printing out Mailing Labels or Name Tags of Teachers.

Any Name Tag type BarCode report will use the standard Name Tag sizes setup in the [Setup - Global](#) area for Name Tags

Each report uses a standard pre-flight settings window that can be seen [here](#).

### Letters

The Letters reports are [Custom Letter Writer](#) reports that you have created.

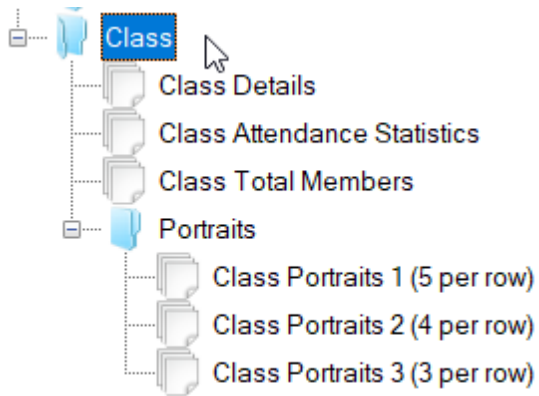
Each report uses a standard pre-flight settings window that can be seen [here](#).

### Class

Shown below is the menu of Class Reports.



Click on each area of the Reports and report categories below to learn more about each report available.



### Class Details

The Class Details report is designed to show for each or selected classes, the Teachers and Students in that class, and selected information about Teachers and Students.

The [Preflight](#) window has all the settings and options for the Class Details Report.

### Preflight

Shown below is the report options window for Class reports.



Click on each area of the report options window below to learn more about these options

Class Report Options

Department  
 Sunday School

Load All Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

Surname Format

Use Family Surname  
 Use Individual Surname (if it exists)  
 Show Hidden Individual Surname

Include Teachers

Teacher Data to Include in Report

Title  Address  
 Mobile  Notes  
 Email  Class  
 Home Phone  Portrait

Include Students

Student Data to Include in Report

Title  Alerts  
 Birthdate  Notes  
 Mobile  Student Pickups  
 Email  Class  
 Home Phone  Portrait  
 Address

Cancel Help Continue

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

Department  
 Sunday School

Load All Students in Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

Include Teachers

Tick this option to include Teachers on the report.

Tick the data for the teachers that you want to include on the report.

**Teacher Data to Include in Report**

<input type="checkbox"/> Title	<input type="checkbox"/> Address
<input type="checkbox"/> Mobile	<input type="checkbox"/> Notes
<input type="checkbox"/> Email	<input type="checkbox"/> Class
<input type="checkbox"/> Home Phone	<input type="checkbox"/> Portrait

Include Students

Tick this option to include Students on the report.  
Tick the data for the students that you want to include on the report.

**Student Data to Include in Report**

<input type="checkbox"/> Title	<input type="checkbox"/> Alerts
<input type="checkbox"/> Birthdate	<input type="checkbox"/> Notes
<input type="checkbox"/> Mobile	<input type="checkbox"/> Student Pickups
<input type="checkbox"/> Email	<input type="checkbox"/> Class
<input type="checkbox"/> Home Phone	<input type="checkbox"/> Portrait
<input type="checkbox"/> Address	


Select the formatting options for Surnames on this report.

**Surname Format**

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

Continue 

Press this to load the selected report.

**Report**


Shown below is a sample Class Details report with some Teacher and Class data selected to display

## Class Report


---

**Beginners**

**Teachers:** Angel Belinda \ 041234567890 \ angel@spirit.com.au \ 054-22-1199  
 12 Water Way Crt Gisborne 3444  
 Beginners, Kingdom Kids



Iles Mrs. Wendy



100 Willowbank Road Riddels Creek 3412  
 Beginners

**Students:** Allwright Mandy \ 05/07/2015 \ 0400-123456  
 Allwright Thomas \ 01/05/2013  
 Anglin Levi \ 03/08/2002 \ 041234567890  
 Anglin Mathew \ 12/03/2002 \ 041234567890

**Class Attendance Statistics**

The Class Attendance Statistics report shows you the Average, Min and Max numbers attended in each class for a selected period of time.

**Preflight**

Options for the Class Attendance Statistics report are shown below.



Click on each area of the report options window below to learn more about these options

Class Statistics Report Options

Department: Sunday School

Load All Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ

Records to Load: All Departments

Date From...  
06/01/2019  
08/09/2018

Date To...  
06/01/2019  
08/09/2018

Help ? Cancel Continue

When available, you can manually select departments and classes to be included on the report.


Or you can tick the Load All option to include all people on the report.

Department: Sunday School

Load All Classes

Beginners  
 Kingdom Kids  
 Crusaders  
 Classmates for Christ


Select either all Departments, or a single department to load and select Dates from for your date range.

Dates Attached to All Departments ▾  
All Departments  
Sunday School   
Youth Group

Select the Start Date of the report

Date From...


06/01/2019  
08/09/2018



Select the End Date of the report

Date To...

06/01/2019  
08/09/2018

Continue 

Press this to load the selected report.

**Report**

Shown below is a sample Class Attendance Statistic Report

Class Statistics Between 08/09/2018 And 06/01/2019 (2 Records)

Min and Max represent the lowest and highest attendance for any one single date record had where the Average was over the entire date records

Class	Average	Max	Min
Beginners	2	4	0
Kingdom Kids	2.5	5	0
Crusaders	2.5	5	0
Classmates for Christ	3	6	0

### Class Total Members

The Class Total Members is a simple report that displays how many students are in each class.

Class	Total	
Beginners	6	
Kingdom Kids	7	
Crusaders	7	
Classmates for Christ	6	

### Portraits

The Class Portraits Report shows Teachers and Students in selected classes and a picture of each.

The [Preflight](#) options control aspects of this report.

### Preflight

Options for the Class Portraits report are shown below.



Click on each area of the report options window below to learn more about these options



**Class Report Options**

Department: Sunday School

Load All Classes

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

**Portrait Options**

- Only Display People with Portraits
- Reverse Surname / Given Name positions
- Include Teachers
- Include Students

**Surname Format**

- Use Family Surname
- Use Individual Surname (if it exists)
  - Show Hidden Individual Surname

Help ? Cancel Continue

When available, you can manually select departments and classes to be included on the report.

Or you can tick the Load All option to include all people on the report.

**Department**

Sunday School

Load All Classes

- Beginners
- Kingdom Kids
- Crusaders
- Classmates for Christ

Tick the options that you need for display of portraits on the Class Portraits report

**Portrait Options**

Only Display People with Portraits

Reverse Surname / Given Name positions

Include Teachers

Include Students


Select the formatting options for Surnames on this report.

**Surname Format**

Use Family Surname

Use Individual Surname (if it exists)

Show Hidden Individual Surname

Continue 

Press this to load the selected report.


### Report

Shown below is the Class Portrait Report.


**Class Portrait Report**

**Beginners**

**Teachers**




Angel  
Belinda




Iles  
Wendy


**Students**




Allwright  
Mandy



Allwright  
Thomas



Anglin  
Levi



Anglin  
Mathew

Dean  
Heather (v)

# Asset Manager



All organisations acquire equipment. Some is so minor that it is rarely noticed, and some is a major piece of equipment that should be managed throughout its service life.

The Pastoral Care Asset Manager is a useful program that can store a whole lot of information about the equipment and assets that the church owns. This can be useful in auditing what you have acquired from time to time, and also very useful for insurance purposes. Your insurance company will really like the reports that you can give them in the event of a claim showing a good record of equipment in your control.

Before using this feature, please go to Settings - Asset Manager from the main menu to setup the names of Categories, Asset Types, Locations and more. See [Asset Manager Setup](#)

## Asset Manager Main Window

Shown below is the Asset Manager Main Window. This has a [Toolbar](#) for accessing various functions, and loading in the assets to work on. Also included is the [Asset Manager Reports](#) area where you can print out a large range of reports to assist in management of your assets. See also the introduction to






Tag	Image	Asset	Category	Status	Location	Used By	Asset Tag	Serial #	Value	Added	Acquisition	Warranty	Compliance	Notes
<input checked="" type="checkbox"/>		Audio Mixing Desk	Fire Extinguishers	In Use	Worship Hall	Ernie Blackeby	7	T745645...	\$4500.00	11/03/2018	01/01/2019	01/01/2022	01/12/2019	24 Channel Mixer
<input type="checkbox"/>		Camera SLR	Cameras	In Use	Church Office	Sue Knight	16	HY7454...	\$2000.00	11/03/2018	01/01/2019	01/01/2023	01/12/2019	
<input type="checkbox"/>		Drums	Musical Instruments	In Use	Worship Hall	Christopher Lynch	15	E422323...	\$1000.00	11/03/2018	01/01/2019	01/01/2022	01/12/2019	
<input type="checkbox"/>		Fire Extinguisher	Fire Extinguishers	In Use	Worship Hall	David Edwards	11	J656546...	\$150.00	11/03/2018	01/01/2019	01/01/2022	01/12/2019	
<input type="checkbox"/>		Fire Extinguisher	Fire Extinguishers	In Use	Sunday School	Peter Brown	10	H656555	\$300.00	11/03/2018	01/01/2019	01/01/2022	01/12/2019	
<input type="checkbox"/>		Guitar	Musical Instruments	In Use	Worship Hall	Julie Flemming	12	F555233...	\$500.00	11/03/2018	01/01/2019	01/12/2019	01/01/2022	
<input type="checkbox"/>		Guitar Amp	Audio Equipment	In Use	Worship Hall	Bill Iles	13	D45533	\$1000.00	11/03/2018	01/01/2019	01/01/2022	01/12/2019	

## Asset Grid

Shown below is a sample Asset Grid loaded with Assets. You can Double Click on any field in the grid to load up that asset in the [View/Edit](#) window, or you can double click on an Asset Image to see a larger size image.

## Sorting

Clicking on a Column title will sort the grid by that column.

Tag	Image	Asset	Category	Status	Location	Used By	Asset Tag	Serial #	Value	Added	Acquisition	Warranty	Compliance
<input checked="" type="checkbox"/>		Mobile	Mobiles	In Use	Church Office	John Flemming	18	HY773345	\$900.00	11/03/2018	01/01/2019	01/01/2021	
<input type="checkbox"/>		Mobile	Mobiles	In Use	Church Office	Darryn Harris	19	GT6432...	\$800.00	11/03/2018	01/01/2019	01/01/2021	C
<input type="checkbox"/>		Piano	Musical Instruments	In Use	Worship Hall	Brook Graham	14	J865455	\$1200.00	11/03/2018	01/01/2019	01/01/2022	01/12/2019
<input type="checkbox"/>		Router	Computer Equipm...	In Use	Church Office	Peter Gray	16	HU845433	\$1500.00	11/03/2018	01/01/2019	01/01/2022	01/12/2019
<input type="checkbox"/>		Video Camera	Cameras	In Use	Worship Hall	Peter Morton	17	FT442322	\$4000.00	11/03/2018	01/01/2019	01/01/2024	01/12/2019

## Toolbar

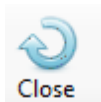
Shown below is the Asset Manager toolbar.



Click on each of the toolbar items to learn more about each function

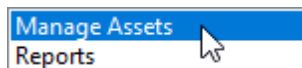


## Close



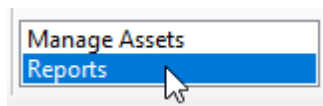
Press this to exit the Asset Manager area.

## Manage Assets



Select Manage Assets to enable the loading of assets into the Asset Manager [Asset Grid](#) where you can view and select assets for editing.

## Reports



Select Reports to let you run an number of useful Asset management reports. (See [Asset Manager Reports](#))

## Load



Press Load to load in either all assets, or Selected Assets using the filters available on the Load Screen.

**Load Screen**

Shown below is the Asset Manager Load screen that contains a number of filters and options to help the load of assets to be more useful for the user.



Click on each area of the window shown below for more information on each function

**Assets Load**

**Available Filters...**

<p><b>Category</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Audio Equipment</li> <li><input type="checkbox"/> Cameras</li> <li><input type="checkbox"/> Computer Equipment</li> <li><input type="checkbox"/> Fire Extinguishers</li> <li><input type="checkbox"/> Furniture</li> <li><input type="checkbox"/> Mobiles</li> <li><input type="checkbox"/> Musical Instruments</li> </ul>	<p><b>Status</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> In Use</li> <li><input type="checkbox"/> In Storage</li> <li><input type="checkbox"/> Disposed Of</li> </ul>	<p><b>Location</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Church Office</li> <li><input type="checkbox"/> Worship Hall</li> <li><input type="checkbox"/> Meeting Areas</li> <li><input type="checkbox"/> Sunday School</li> <li><input type="checkbox"/> Youth Hall</li> </ul>
---	---	---

<input type="checkbox"/> Filter on Added Date	<input type="checkbox"/> Filter on Acquisition Date
10/06/2019 To 10/06/2019	10/06/2019 To 10/06/2019
<input type="checkbox"/> Filter on Warranty Expiry Date	<input type="checkbox"/> Filter on Next Compliance Date
10/06/2019 To 10/06/2019	10/06/2019 To 10/06/2019

Asset Name <input type="text"/>	Used By <input type="text"/>
Asset Tag <input type="text"/>	Serial # <input type="text"/>

Load Asset Images   Small  Medium  Large

If you leave every one of these filters un-checked, then all categories, status's and locations will be loaded.

To filter for any of these, simply tick all that apply that you want to load from.

<p><b>Category</b></p> <ul style="list-style-type: none"> <li style="background-color: #00aaff; color: white; padding: 2px;"><input type="checkbox"/> Computer Equipment</li> <li><input type="checkbox"/> Mobiles</li> <li><input type="checkbox"/> Furniture</li> <li><input type="checkbox"/> Fire Extinguishers</li> <li><input type="checkbox"/> Audio Equipment</li> <li><input type="checkbox"/> Musical Instruments</li> <li><input type="checkbox"/> Cameras</li> </ul>	<p><b>Status</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> In Use</li> <li><input type="checkbox"/> In Storage</li> <li><input type="checkbox"/> Disposed Of</li> </ul>	<p><b>Location</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Church Office</li> <li><input type="checkbox"/> Worship Hall</li> <li><input type="checkbox"/> Meeting Areas</li> <li><input type="checkbox"/> Sunday School</li> <li><input type="checkbox"/> Youth Hall</li> </ul>
--	---	---

Using the Date filters lets you find a range of Assets that may need to have something done to them / with them.

For example, ticking Filter on Next Compliance Date and setting a range from your current date and forward 1 month will show you a list of assets due for their compliance check in the next month.

<input type="checkbox"/> Filter on Added Date	<input type="checkbox"/> Filter on Acquisition Date
10/06/2019 To 10/06/2019	10/06/2019 To 10/06/2019
<input type="checkbox"/> Filter on Warranty Expiry Date	<input type="checkbox"/> Filter on Next Compliance Date
10/06/2019 To 10/06/2019	10/06/2019 To 10/06/2019

Enter in the Asset Name to locate just one asset. This must be typed correctly to find the asset.

Asset Name

Enter in the Asset Tag to locate just one asset. This must be typed correctly to find the asset.

Asset Tag

Enter in the name of person in the Used By field to find all assets used by that person.

 You can press the People Button to select a person

Used By  


Enter in the Serial Number to find an asset by the serial number. Please note, this search is Case Sensitive.

Serial #


Tick the Load Asset Images if you want to display images in the [Asset Grid](#).

You can also select the size of the image. The larger the image, the fewer assets that are visible on the one screen without having to scroll the window.

Load Asset Images   Small  Medium  Large

Reset 

Press the Reset button to reset all filters to the default settings. (Default settings are no filters - load all assets)

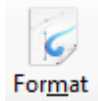
Load 

Press the Load button to complete the load process and display the assets according to any selected filters and options.

### Process



The process button is only activated when in the [Asset Manager Reports](#) area. Pressing Process will load the selected report.

**Format**

The Format button is only activated when in the [Asset Manager Reports](#) area. Pressing Format will load a window for controlling some Report Formatting Options.

**Add**

Press the Add button to create a new Asset using the [Add Asset](#) window.

**Add Asset**

Shown below is the Add Asset window. This is shown filled in ready to save a new asset.



**Click on each part of the window below learn more about each function**

View/Edit Asset

Asset  Quantity

Added

Category  ...

Status  ...

Location  ...

Used By

Serial #

Asset Tag

Value \$

Acquisition  ...


Warranty Expiry  ...

Next Compliance  ...

Notes

Add/Change Image Via...

Image Editor  WebCam



Enter a title for the Asset. This should be as short as possible, but not so short that it does not read clearly to other people.

Asset  Quantity

If you are entering an asset like a Chair, and you have many of them, you can enter one asset, and add a Quantity to indicate how many of them you normally have.

The Added date will default to the day you are entering the asset. This can be changed also if you are entering an asset that was added earlier.

Added

Select a Category that the Asset belongs to.

Your initial setup of all Asset Manager selection fields is done in the [Asset Manager Setup](#) area.



If you need to create a Category while entering an Asset, you can press the button next to the Category field.



Select a Status that the Asset belongs to.

Your initial setup of all Asset Manager selection fields is done in the [Asset Manager Setup](#) area.

If you need to create a Status while entering an Asset, you can press the button next to the Status field.

Select a Location that the Asset belongs to.

Your initial setup of all Asset Manager selection fields is done in the [Asset Manager Setup](#) area.

If you need to create a Location while entering an Asset, you can press the button next to the Location field.

The Used By field is intended to record the primary person that uses this asset. Or perhaps the primary person who is responsible for this asset.

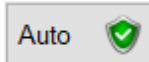
As this is a free form field, you can enter a persons Name, a Nick Name, or perhaps a department name if you like.

Pressing this button will open a window where you can find a person already in your database to add to the Used By field.

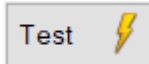
The Serial Number field is a free form field that can take all characters. This is for recording a serial number of an asset if one exists.

If you wish to use your own Numbering System for identifying Assets, you can enter your Tag number here. This can be Any combination of all characters.

Asset Tag  Auto  Test  View 



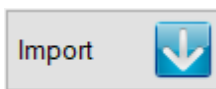
Press this to allow Pastoral Care to generate an Asset Tag number for you.



Press this to test if the Asset Tag you have entered is a unique Tag identifier



Press this to view a list of all asset Tags



When adding an asset, you can press the Import button to be able to import a CSV text file of assets. The following fields will not be imported:  
Added. Category, Status, Location, Used By or Notes

Here is a sample import spreadsheet, you would need to save this as a CSV before importing

	A	B	C	D	E	F	G	H
1	ASSET	QUANTITY	VALUE	SERIAL #	Asset Tag	Acquisition	Warranty Expiry	Next Compliance
2	Nikon DSLR	1	900	nk123456	C1	1/05/2020	1/05/2023	1/05/2021
3	Laptop, Acer X1	1	1200	ac123487A23	L1	1/05/2020	1/05/2023	1/05/2021
4	Laptop, Acer X1	1	1200	ac4589Avaa3	L2	1/05/2020	1/05/2023	1/05/2021
5	Laptop, Acer X1	1	1200	acF34123C14	L3	1/05/2020	1/05/2023	1/05/2021
6								
7								
8								

Enter a Value (in your local currency) that represents the current value of that item. This could be a written down devaluated amount, or perhaps replacement value.

Value \$

Enter the date that the Asset was acquired.



Pressing this button lets you select a date from a Date Picking tool instead of typing it.

Acquisition

Enter the date that the Asset Warranty is expiring




Pressing this button lets you select a date from a Date Picking tool instead of typing it.

Warranty Expiry

Enter the date that the Asset is due for its next Compliance Check.

If you are not doing a compliance check on a particular asset, simply leave this field empty.

 Pressing this button lets you select a date from a Date Picking tool instead of typing it.

Next Compliance  



Enter any useful notes about this asset.

Notes

Use the Image Editor to add a file image for this asset, or use the Web Cam to take a picture of the asset and add this.

Add Image Via...

Image Editor  WebCam

Load Image  Delete Image 

Mask

When you are adding an Asset, if you press the Save button, the asset is saved and the window fields are cleared ready to enter another asset.

Pressing Mask, opens a form that allows you to set fields no NOT be cleared for the next entry.

This will speed up the entry process if you are doing the data entry in some sort of logical order.

New Asset Item Mask

The Mask function allows after adding a new Asset for the fields chosen below not to be cleared, this way you can quickly enter multiple new Assets.

Category

Status

Location

Used By


Acquisition

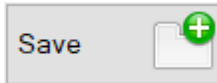
Warranty Expiry

Next Compliance

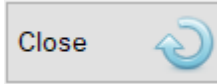
Notes

Image

Close 



Pressing Save will save the current New Asset, and refresh the Add Asset form ready to add another asset.



Press Close to close the Add Asset form. If nothing has been entered, the window will simply close. If a new asset has been added or there has been a change to the data on this window, you will be prompted to save or not save the changes.

### View/Edit



The View / Edit button on the toolbar opens up a window for modifying an existing (currently selected) asset.



**Click on each part of the window below learn more about each function**

View/Edit Asset

Asset  Quantity

Added

Category  ...

Status  ...

Location  ...

Used By

Serial #

Asset Tag

Value \$

Acquisition  ...

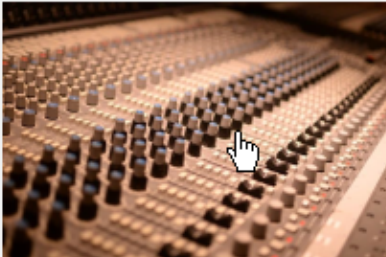
Warranty Expiry  ...

Next Compliance  ...

Notes

Add/Change Image Via...

Image Editor  WebCam



**Asset**

This is the Asset Title / Name. This should be as short as possible to accurately describe the asset.

Asset

**Quantity**

Enter the Quantity of the asset you have. The default is 1. This is ideal if you are recording for example 50 chairs that are all the same.

Quantity

**Added**


The Added date will default to the day you are entering the asset. This can be changed also if you are entering an asset that was added earlier.

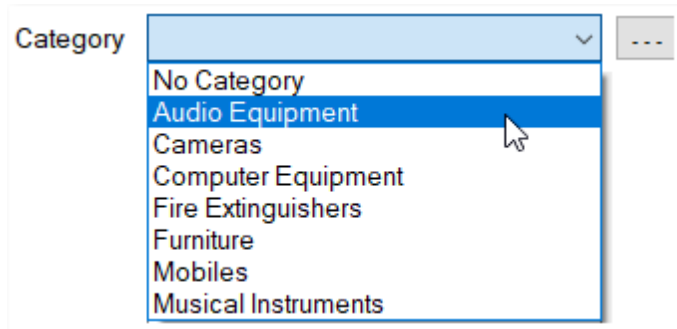
Added

### Category

Select a Category that the Asset belongs to.

Your initial setup of all Asset Manager selection fields is done in the [Asset Manager Setup](#) area.


 If you need to create a Category while entering an Asset, you can press the button next to the Category field.

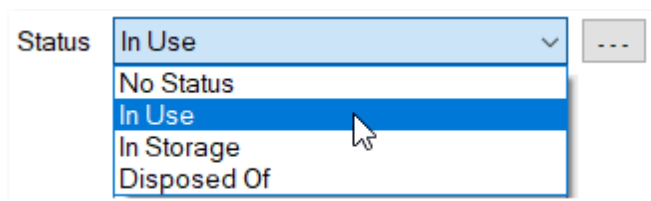


### Status

Select a Status that the Asset belongs to.

Your initial setup of all Asset Manager selection fields is done in the [Asset Manager Setup](#) area.


 If you need to create a Status while entering an Asset, you can press the button next to the Status field.

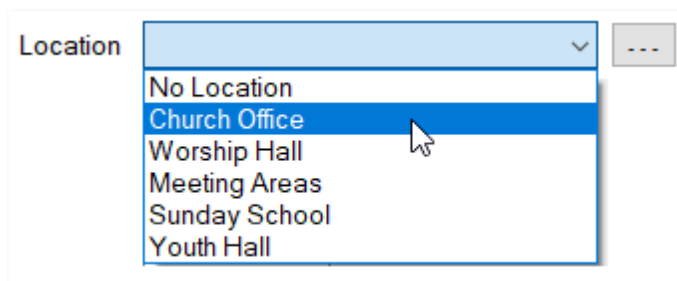


### Location

Select a Location that the Asset belongs to.

Your initial setup of all Asset Manager selection fields is done in the [Asset Manager Setup](#) area.

 If you need to create a Location while entering an Asset, you can press the button next to the Location field.



### Used By

The Used By field is intended to record the primary person that uses this asset. Or perhaps the primary person who is responsible for this asset.

As this is a free form field, you can enter a persons Name, a Nick Name, or perhaps a department name if you like.

Used By  



Pressing this button will open a window where you can find a person already in your database to add to the Used By field.

### Serial


The Serial Number field is a free form field that can take all characters. This is for recording a serial number of an asset if one exists.

Serial #


### Asset Tag

If you wish to use your own Numbering System for identifying Assets, you can enter your Tag number here. This can be Any combination of all characters.

Asset Tag    

Auto 

Press this to allow Pastoral Care to generate an Asset Tag number for you.

Test 

Press this to test if the Asset Tag you have entered is a unique Tag identifier

View 

Press this to view a list of all asset Tags

### Value

Enter a Value (in your local currency) that represents the current value of that item. This could be a written down devaluated amount, or perhaps replacement value.


Value \$

### Acquisition

Enter the date that the Asset was acquired.



Pressing this button lets you select a date from a Date Picking tool instead of typing it.


Acquisition  

### Warranty Expiry

Enter the date that the Asset Warranty is expiring



Pressing this button lets you select a date from a Date Picking tool instead of typing it.

Warranty Expiry  

### Next Compliance

Enter the date that the Asset is due for its next Compliance Check.

If you are not doing a compliance check on a particular asset, simply leave this field empty.



Pressing this button lets you select a date from a Date Picking tool instead of typing it.

Next Compliance  ...

### Notes

Enter any useful notes about this asset.



Notes

### Add Image


Use the Image Editor to add a file image for this asset, or use the Web Cam to take a picture of the asset and add this.

Add Image Via...

Image Editor  WebCam


Load Image  Delete Image 

### Update

Update 

Pressing Update will save any changes made on this window. If this button is disabled, no changes have been made to save.

### Close

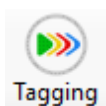
Close 

Press Close to close the View / Edit Asset form. If nothing has been changed, the window will simply close. If there has been any changes to the currently displayed asset, you will be prompted to save or not save the changes.

### Tagging

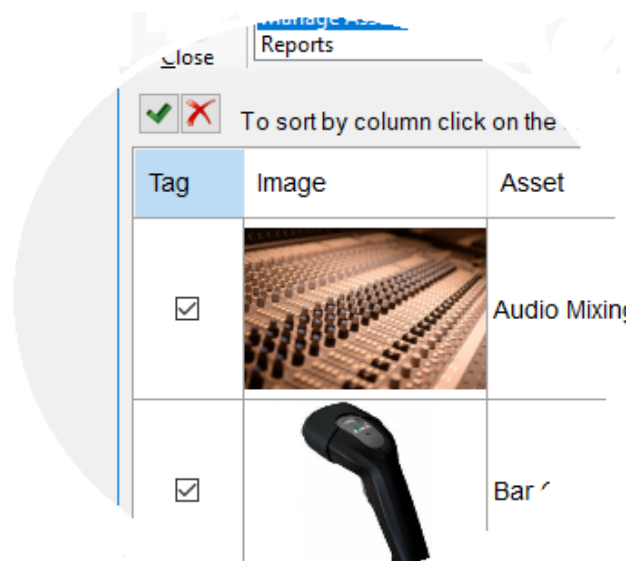
Using the Tag column, you can select individual items in groups, or tick the green Tick button to select all displayed assets.

This is shown to the right here, you can see 2 items have been tagged



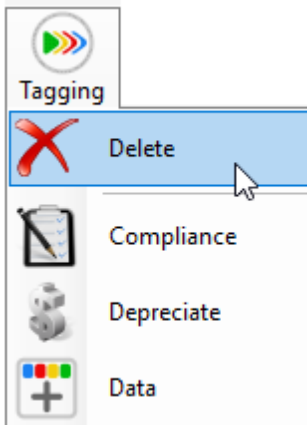
Once selected, the Tagging button becomes Activated. This button opens up a window that allows you to update all tagged items at once with a single or multiple edit at the same time on all tagged items.

When the Tagging button is selected, the following menu is displayed. Click on each menu item to



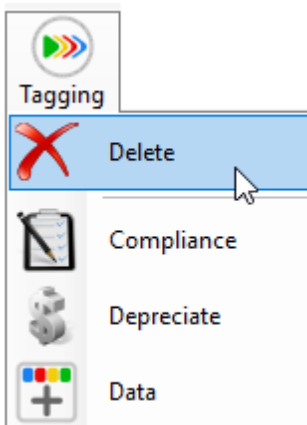


learn more.



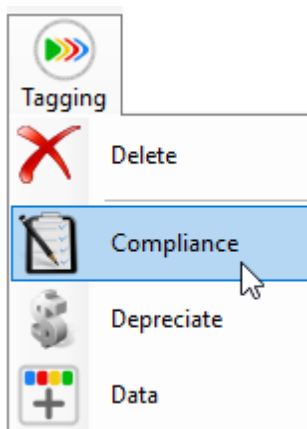
### Delete

Press the Delete Option to delete all tagged assets. A Delete cannot be undone in Pastoral Care.

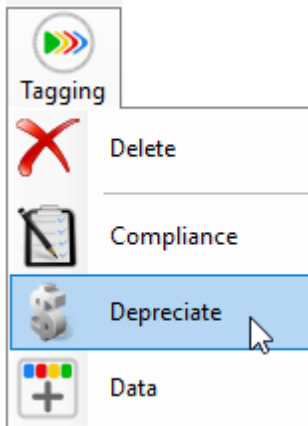


### Compliance

Select the Compliance option to set the Compliance Date for all tagged Items.



## Depreciate



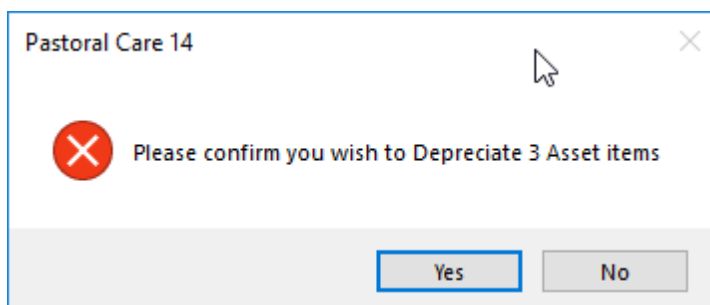
Select the Depreciate option to depreciate / appreciate all tagged items by a selected percentage.

It may be a good idea to backup your database before adjusting multiple items here. If you make a mistake across a large number of items, it can be rather time consuming to be undoing that work.

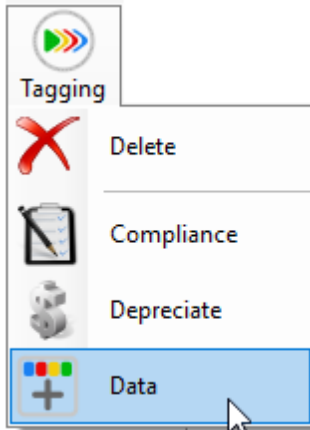
See [Backup Data](#) for information on how to backup your database.

To make a change to the value of all selected Assets, simply put in the percentage, choose Depreciate (Reduce Price) or Appreciate (Increase Price), then enter the Percentage. Note the other controls for rounding and writing off rules, and press OK when you are ready to make the change.

You are warned of changes with a message similar to the following message



## Data



Select the Data option to modify all selected Assets with selected changes to the fields available.

It may be a good idea to backup your database before adjusting multiple items here. If you make a mistake across a large number of items, it can be rather time consuming to be undoing that work.

See [Backup Data](#) for information on how to backup your database.

To make a change to the data of all selected Assets, Simply select any of the available data areas (shown below) and press the OK Button

This example will set the Category, Status and Used By fields to all tagged items.

Asset Group Tag

All tagged Assets will be added the information added below...

Category: Audio Equipment

Status: In Use

Location:

Used By: Tech Team

Added:

Acquisition:

Warranty Expiry:

Next Compliance:

Buttons: Help, Cancel, OK

You are warned of changes with a message similar to the following message

Pastoral Care 14

Please confirm you wish to add new data to 3 Asset items

Buttons: Yes, No

## Stocktake



The Stocktaking feature is designed to assist in recording on a specific date that you have identified and accounted for all of your Assets.

You can run some Stocktakes by category, status or locations filters to make the job more manageable if that suits your needs.

Shown below is the Asset Stock Take load form, this controls the filters for the stock take, and also has the option to view or alter an existing stock take



Click on each part of the window below learn more about each function

Asset Stock Take Load

Add New Stock Take Record    Monday . 10 June 2019

View / Alter Stocktake Record    Edit Date    Delete

01/01/2019

Dont include assets added after stocktake date

Display 'Serial #' in StockTake     Show all Assets  
 Display 'Asset Tag' in Stocktake     Only show Assets not Located

**Available Filters...**

Category	Status	Location
<input type="checkbox"/> Audio Equipment <input type="checkbox"/> Cameras <input type="checkbox"/> Computer Equipment <input type="checkbox"/> Fire Extinguishers <input type="checkbox"/> Furniture <input type="checkbox"/> Mobiles <input type="checkbox"/> Musical Instruments	<input type="checkbox"/> In Use <input type="checkbox"/> In Storage <input type="checkbox"/> Disposed Of	<input type="checkbox"/> Church Office <input type="checkbox"/> Worship Hall <input type="checkbox"/> Meeting Areas <input type="checkbox"/> Sunday School <input type="checkbox"/> Youth Hall

Filter on Added Date     Filter on Acquisition Date

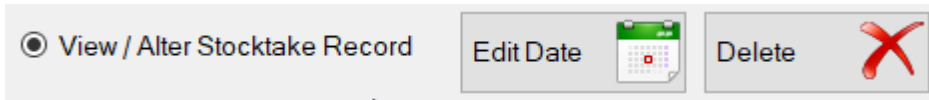
10/06/2019 To 10/06/2019    10/06/2019 To 10/06/2019

Load    Cancel    Help

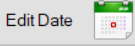
### Add New Stock Take Record

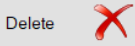
Add New Stock Take Record    Monday . 10 June 2019

Select this and press [Load](#) to load in all assets for a Stocktake. If you want to create a stocktake on a smaller set of assets, use the [Filters](#) and or [Date Filters](#) to limit the load.

**View / Alter Stock Take Record**

To load a Stocktake that is already created, select the View-Alter option, select the date, and press Load.

 To Edit a date (the date, not the stocktake) select the date from the list and press Edit Date. This will let you change a date if you have recorded a stocktake against the wrong date.

 You can Delete a Stocktake by selecting the date, and pressing this Delete button. No Assets are removed, however, the acknowledgment of the asset been viewed will be removed.

**Available Dates**

This is a list of dates that already have a Stocktake saved against them. To load a date, select the View-Alter option, select the date, and press Load.

**Dont Include Assets**

Dont include assets added after stocktake date

Tick this option to not include any assets that have been dated as added after the Stocktake date.

**Display Options**

Display 'Serial #' in StockTake       Show all Assets  
 Display 'Asset Tag' in Stocktake       Only show Assets not Located

Select to see either a Serial Number or an Asset Tag in the stocktake window

Select to either Show All Assets (recommended) or only show Assets not located.

## Filters

Leave all items un-checked to load all assets, or select category, status and location to load.

**Available Filters...**

Category	Status	Location
<input type="checkbox"/> Audio Equipment	<input type="checkbox"/> In Use	<input type="checkbox"/> Church Office
<input type="checkbox"/> Cameras	<input type="checkbox"/> In Storage	<input type="checkbox"/> Worship Hall
<input type="checkbox"/> Computer Equipment	<input type="checkbox"/> Disposed Of	<input type="checkbox"/> Meeting Areas
<input type="checkbox"/> Fire Extinguishers		<input type="checkbox"/> Sunday School
<input type="checkbox"/> Furniture		<input type="checkbox"/> Youth Hall
<input type="checkbox"/> Mobiles		
<input type="checkbox"/> Musical Instruments		

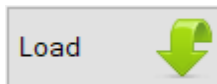
## Date Filters

Tick a date filter and set a From and To range to load data for.

Filter on Added Date  Filter on Acquisition Date

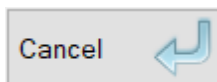
10/06/2019 To 10/06/2019 10/06/2019 To 10/06/2019

## Load



Press Load to load in the new Stocktake, or load in the selected Stocktake. The [Stocktake Window](#) will then be loaded with the Assets requested.

## Cancel



Press Cancel to close the Asset Stocktake Load window and return to the Asset Manager.

## Stocktake Window

Shown below is the Stocktake window with assets loaded ready to tick that they have been accounted for.

[See also Stocktake](#) for more information on loading this window.



Click on each part of the window below learn more about each function

Asset Stock Take for 11/06/2019

Asset	Serial #	Located
Audio Mixing Desk	T74564554	<input type="checkbox"/>
Bar Code Scanner	BE-1249423	<input type="checkbox"/>
Camer SLR	HY74543534	<input type="checkbox"/>
Drums	E42232343	<input type="checkbox"/>
Fire Extinguisher	J65654654	<input type="checkbox"/>
Fire Extinguisher	H656555	<input type="checkbox"/>
Guitar	F55523332	<input type="checkbox"/>
Guitar Amp	D45533	<input type="checkbox"/>
Keyboard	D4543232	<input type="checkbox"/>
Laptop	H345732113	<input type="checkbox"/>
Laptop	H5234543	<input type="checkbox"/>
Laptop	H654654645	<input type="checkbox"/>
Laptop	H23542345	<input type="checkbox"/>
Laptop	H654645454645	<input type="checkbox"/>
Microphone	H77467565	<input type="checkbox"/>
Microphone	G6644332	<input type="checkbox"/>
Mobile	HY773345	<input type="checkbox"/>
Mobile	GT64322234	<input type="checkbox"/>
Piano	J865455	<input type="checkbox"/>
Router	HU845433	<input type="checkbox"/>
Video Camera	FT442322	<input type="checkbox"/>

The Enter key can be used to mark assets as Located or not Located

**Tag / Untag All**

Tick All or Untick all items as Located.

### Asset List

This is the list of assets for you to find and identify.

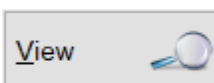
Asset	Serial #	Located
Audio Mixing Desk	T74564554	<input type="checkbox"/>
Bar Code Scanner	BE-1249423	<input type="checkbox"/>
Camer SLR	HY74543534	<input type="checkbox"/>
Drums	E42232343	<input type="checkbox"/>
Fire Extinguisher	J65654654	<input type="checkbox"/>
Fire Extinguisher	H656555	<input type="checkbox"/>
Guitar	F55523332	<input type="checkbox"/>
Guitar Amp	D45533	<input type="checkbox"/>
Keyboard	D4543232	<input type="checkbox"/>
Laptop	H345732113	<input type="checkbox"/>
Laptop	H5234543	<input type="checkbox"/>
Laptop	H654654645	<input type="checkbox"/>
Laptop	H23542345	<input type="checkbox"/>
Laptop	H654645454645	<input type="checkbox"/>
Microphone	H77467565	<input type="checkbox"/>
Microphone	G6644332	<input type="checkbox"/>
Mobile	HY773345	<input type="checkbox"/>
Mobile	GT64322234	<input type="checkbox"/>
Piano	J865455	<input type="checkbox"/>
Router	HU845433	<input type="checkbox"/>
Video Camera	FT442322	<input type="checkbox"/>

### Single Tag

Use the mouse left click to tick an asset as Located, or press Enter when the line is highlighted to toggle the Located field as well.

Asset	Serial #	Located
Audio Mixing Desk	T74564554	<input type="checkbox"/>
Bar Code Scanner	BE-1249423	<input type="checkbox"/>
Camer SLR	HY74543534	<input checked="" type="checkbox"/>
Drums	E42232343	<input type="checkbox"/>
Fire Extinguisher	J65654654	<input type="checkbox"/>
Fire Extinguisher	H656555	<input type="checkbox"/>
Guitar	F55523332	<input type="checkbox"/>


### View



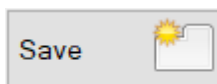


Press this button to view the current asset. The following pop up window is displayed...

Asset View
✕

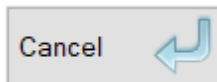
Added	<input type="text" value="Sunday, March 11, 2018"/>	
Asset	<input type="text" value="Camer SLR"/>	
Category	<input type="text" value="Cameras"/>	
Status	<input type="text" value="In Use"/>	
Location	<input type="text" value="Church Office"/>	
Used By	<input type="text" value="Rusty"/>	
Serial #	<input type="text" value="HY74543534"/>	
Asset Tag	<input type="text" value="16"/>	
Value \$	<input type="text" value="\$2000.00"/>	
Acquisition	<input type="text" value="01/01/2019"/>	
Warranty Expiry	<input type="text" value="01/01/2023"/>	
Next Compliance	<input type="text" value="01/12/2019"/>	
Notes	<div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div>	

### Save



When you have ticked all identified assets, press the Save button to complete the stocktake. This can be edited later by selecting the View Alter option on the Stocktake window and loading a selected date record.

### Cancel



Press Cancel to back out of a stocktake and not save any changes.

### Alerts

Alerts in Pastoral Care are checked each time Pastoral Care starts. See [Alerts](#) for more information on the Main Window alerts feature.


To create an alert, simply select the Category Filter, and the Alert Days to trigger on the Compliance Date, and press Add


To remove an alert, select it in the list and press Remove

Asset Compliance Alerts ✕

Compliance Alerts are notified when Pastoral Care starts up and are then displayed in the Alerts area within the Dashboard.



Category Filter

Audio Equipment ▼ Add 

Display Alert within  Days of due Compliance date Remove 

Active Alerts

Category	Alert
Computer Equipment	7

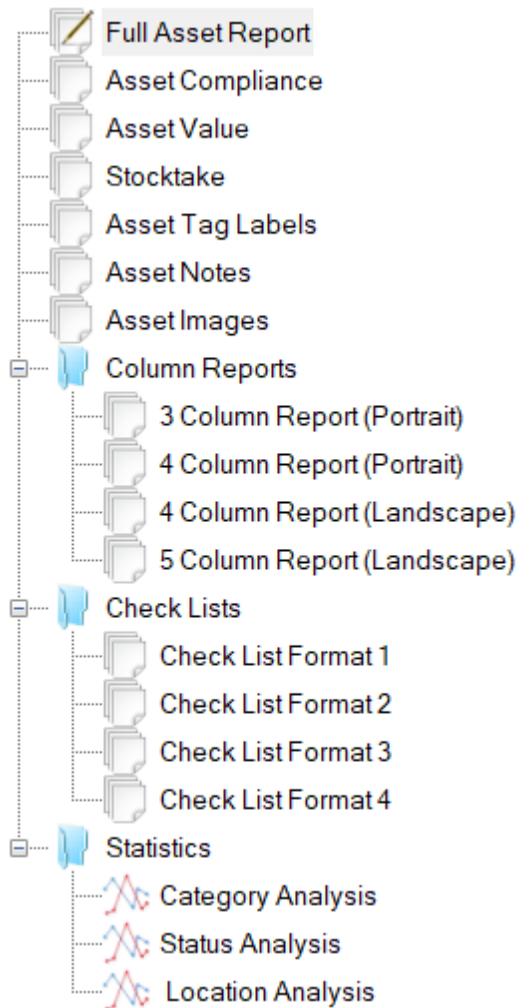
Help  Close 

### Asset Manager Reports

Shown below is the Asset Manager Reports menu.



Click on each report / Area for more details about that report



### Full Asset Report

The Full Asset Report has the most data available on it, allowing you to detail everything on record about that Asset.


### Preflight





The following Preflight / Options window is displayed before the [Full Asset Report](#) is loaded.



Click on each part of the window below to learn more about each function

Assets Full Report Setup

<b>Fields to Include</b> <input checked="" type="checkbox"/> Category <input checked="" type="checkbox"/> Status <input checked="" type="checkbox"/> Location <input checked="" type="checkbox"/> Used By <input checked="" type="checkbox"/> Serial # <input checked="" type="checkbox"/> Asset Tag <input checked="" type="checkbox"/> Value <input checked="" type="checkbox"/> Added Date <input checked="" type="checkbox"/> Acquisition Date <input checked="" type="checkbox"/> Warranty Expiry <input checked="" type="checkbox"/> Next Compliance <input checked="" type="checkbox"/> Notes <input checked="" type="checkbox"/> Asset Image	<b>Filter Category</b> <input type="checkbox"/> Audio Equipment <input type="checkbox"/> Cameras <input type="checkbox"/> Computer Equipment <input type="checkbox"/> Fire Extinguishers <input type="checkbox"/> Furniture <input type="checkbox"/> Mobiles <input type="checkbox"/> Musical Instruments	<input type="checkbox"/> Filter on Added Date 10/06/2019 To 10/06/2019 <input type="checkbox"/> Filter on Acquisition Date 10/06/2019 To 10/06/2019 <input type="checkbox"/> Filter on Warranty Expiry Date 10/06/2019 To 10/06/2019 <input type="checkbox"/> Filter on Next Compliance Date 10/06/2019 To 10/06/2019
<b>Filter Status</b> <input type="checkbox"/> In Use <input type="checkbox"/> In Storage <input type="checkbox"/> Disposed Of	<b>Filter Location</b> <input type="checkbox"/> Church Office <input type="checkbox"/> Worship Hall <input type="checkbox"/> Meeting Areas <input type="checkbox"/> Sunday School <input type="checkbox"/> Youth Hall	Asset <input type="text"/> Serial # <input type="text"/> Used By <input type="text"/>  Asset Tag <input type="text"/> <input type="checkbox"/> Only Display Assets with Images <input type="checkbox"/> Pre Tag Assets

### Fields to include

Tick the fields that you want to include on the report. By default All Fields are ticked.

Fields to Include

- Category
- Status
- Location
- Used By
- Serial #
- Asset Tag
- Value
- Added Date
- Acquisition Date
- Warranty Expiry
- Next Compliance
- Notes
- Asset Image

### Filter Category

Select (tick) the Categories to include on the report. If you tick nothing, all categories will be included on the report.

**Filter Category**

- Audio Equipment
- Cameras
- Computer Equipment
- Fire Extinguishers
- Furniture
- Mobiles
- Musical Instruments

**Filter Status**

Select (tick) the Status to include on the report. If you tick nothing, all Status's will be included on the report.

**Filter Status**

- In Use
- In Storage
- Disposed Of

**Filter Location**

Select (tick) the Location to include on the report. If you tick nothing, all Locations will be included on the report.

**Filter Location**

Church Office

Worship Hall

Meeting Areas



Sunday School

Youth Hall



### Date Filters

Tick a date option and set a Date Range to search on.



Filter on Added Date

10/06/2019  To 10/06/2019 



Filter on Acquisition Date

10/06/2019  To 10/06/2019 

Filter on Warranty Expiry Date

10/06/2019  To 10/06/2019 

Filter on Next Compliance Date

10/06/2019  To 10/06/2019 

### Asset

Enter in the Asset Name to locate just one asset. This must be typed correctly to find the asset.

Asset Name

### Serial #


Enter in the Serial Number to find an asset by the serial number. Please note, this search is Case Sensitive.

Serial #

### Used By

Enter in the name of person in the Used By field to find all assets used by that person.

 You can press the People Button to select a person

Used By  

**Asset Tag**

Enter in the Asset Tag to locate just one asset. This must be typed correctly to find the asset.

Asset Tag

**Images**

Tick this option to only allow assets onto the report that have Images.

Only Display Assets with Images

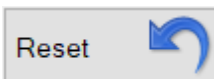
**Pre Tag Assets**

If you tick the Pre Tag Assets check box for a report, the following window opens before the report loads.

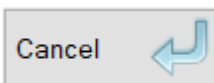
This window lets you manually tick the Assets you want on the report.

Tag Assets for sending to Report

Tag	Asset Tag	Asset Tag
<input checked="" type="checkbox"/>	Audio Mixing Desk	7
<input checked="" type="checkbox"/>	Bar Code Scanner	48
<input checked="" type="checkbox"/>	Camer SLR	16
<input checked="" type="checkbox"/>	Drums	15
<input checked="" type="checkbox"/>	Fire Extinguisher	11
<input checked="" type="checkbox"/>	Fire Extinguisher	10
<input checked="" type="checkbox"/>	Guitar	12
<input checked="" type="checkbox"/>	Guitar Amp	13
<input checked="" type="checkbox"/>	Keyboard	14
<input checked="" type="checkbox"/>	Laptop	1
<input checked="" type="checkbox"/>	Laptop	5
<input checked="" type="checkbox"/>	Laptop	4
<input checked="" type="checkbox"/>	Laptop	3
<input checked="" type="checkbox"/>	Laptop	2
<input checked="" type="checkbox"/>	Microphone	9
<input checked="" type="checkbox"/>	Microphone	8
<input checked="" type="checkbox"/>	Mobile	18
<input checked="" type="checkbox"/>	Mobile	19
<input checked="" type="checkbox"/>	Piano	14
<input checked="" type="checkbox"/>	Router	16
<input checked="" type="checkbox"/>	Video Camera	17

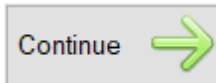
**Reset**

Press this to reset the Assets Full Report Setup window to default settings.

**Cancel**

Pressing Cancel will cancel the report process and return you to the Asset Manager main window.



**Continue**

Pressing Continue will display the report.

**Report**

Shown below is a sample of the Full Asset Report with all available fields selected for display.

**Assets Report****Audio Mixing Desk**

**Added Date:** 11/03/2018  
**Category:** Fire Extinguishers  
**Status:** In Use  
**Location:** Worship Hall  
**Used By:** Ernie Blackeby  
**Aquisition Date:** 01/01/2019  
**Warranty Expiry:** 01/01/2022  
**Next Compliance:** 01/12/2019  
**Notes:** 24 Channel Mixer

**Serial #:** T74564554  
**Asset Tag:** 7  
**Value:** \$4,050.00

**Bar Code Scanner**

**Added Date:** 10/06/2019  
**Category:** Computer Equipment  
**Status:** In Use  
**Location:** Meeting Areas  
**Used By:** Teachers  
**Aquisition Date:** 04/03/2019  
**Warranty Expiry:** 04/03/2020

**Serial #:** BE-1249423  
**Asset Tag:** 48  
**Value:** \$98.00



**Notes:** This is a wireless scanner. Asset Tag sticker is on the scanner and the charger base

**Camer SLR**

**Added Date:** 11/03/2018  
**Category:** Cameras  
**Status:** In Use  
**Location:** Church Office  
**Used By:** Rusty  
**Aquisition Date:** 01/01/2019

**Serial #:** HY74543534  
**Asset Tag:** 16  
**Value:** \$2,000.00

**Asset Compliance**

The Asset Compliance lists all assets that are getting close to compliance date expiry.

You can set the date and the amount of days to look forward for expiry in the [Pre Flight](#) window that opens before running this report.

**Pre Flight**

The following Preflight / Options window is displayed before the [Asset Compliance](#) report is loaded.



Click on each part of the window below to learn more about each function

Asset Filters Before Running the Report

**Available Filters...**


Category	Status	Location
<input type="checkbox"/> Audio Equipment <input type="checkbox"/> Cameras <input type="checkbox"/> Computer Equipment <input type="checkbox"/> Fire Extinguishers <input type="checkbox"/> Furniture <input type="checkbox"/> Mobiles <input type="checkbox"/> Musical Instruments	<input type="checkbox"/> In Use <input type="checkbox"/> In Storage <input type="checkbox"/> Disposed Of	<input type="checkbox"/> Church Office <input type="checkbox"/> Worship Hall <input type="checkbox"/> Meeting Areas <input type="checkbox"/> Sunday School <input type="checkbox"/> Youth Hall

Filter on Added Date  
 11/06/2019 To 11/06/2019

Filter on Acquisition Date  
 11/06/2019 To 11/06/2019





Filter on Warranty Expiry Date  
 11/06/2019 To 11/06/2019

Filter on Next Compliance Date  
 11/06/2019 To 11/06/2019

Asset  Used By  

Serial #  Asset Tag

Display 'Serial #' in Report      Display Compliance within  Days of due date  
 Display 'Asset Tag' in Report      From

Pre Tag Assets     Help     Reset     Cancel     Continue 

### Filters









Tick the specific Category, Status or Location combinations you are interested in.

If you want to see all assets on the report, do NOT tick any items here.

Category	Status	Location
<input type="checkbox"/> Computer Equipment <input type="checkbox"/> Mobiles <input type="checkbox"/> Furniture <input type="checkbox"/> Fire Extinguishers <input type="checkbox"/> Audio Equipment <input type="checkbox"/> Musical Instruments <input type="checkbox"/> Cameras	<input type="checkbox"/> In Use <input type="checkbox"/> In Storage <input type="checkbox"/> Disposed Of	<input type="checkbox"/> Church Office <input type="checkbox"/> Worship Hall <input type="checkbox"/> Meeting Areas <input type="checkbox"/> Sunday School <input type="checkbox"/> Youth Hall

**Date Filters**

Tick the date you want to filter on and use the drop down lists to select the date range for the selected filter. If you tick more than one date, there is a likelihood that no data will be displayed due to multiple dates having to be inside your search range to find a result.

<input checked="" type="checkbox"/> Filter on Added Date	<input checked="" type="checkbox"/> Filter on Acquisition Date
24/06/2019  To 24/06/2019 	24/06/2019  To 24/06/2019 
<input checked="" type="checkbox"/> Filter on Warranty Expiry Date	<input checked="" type="checkbox"/> Filter on Next Compliance Date
24/06/2019  To 24/06/2019 	24/06/2019  To 24/06/2019 

**Asset Name**

Enter a name of an asset to find for your report.

Asset Name

**Serial #**

Enter a Serial Number to search for.

Serial #

**Used By**

Enter a Name or use the People Button to find a name to search on.

Used By  

**Asset Tag**

Enter an Asset Tag to search for to include on your report

Asset Tag


**Display Options**

Choose to include the Serial Number or the Asset Tag in the report.

- Display 'Serial #' in Report  
 Display 'Asset Tag' in Report

**Due Date Target**

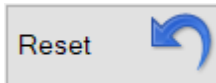
As this is an Asset Compliance Report, enter the number of days to search within the Due Date of compliance. The default From Date will be the date of the report.

Display Compliance within  Days of due date  
 From  

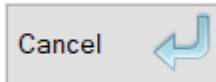
**Pre Tag Assets**

Tick this option for Pastoral Care to display a list of assets that will be on the report, and you can further control what goes on the report by tagging or un-tagging assets as needed.

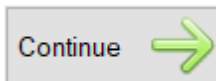
Pre Tag Assets

**Reset**

Press this to reset the Pre-Flight window to default settings

**Cancel**

Press this to cancel the selected report.

**Continue**

Press this to produce the selected report.

**Report**

Shown below is a sample Assets Compliance report showing a due date for the Compliance of each asset.

**Assets Compliance**

Asset	Serial #	Compliance
Audio Mixing Desk	T74564554	01/12/2019
Camer SLR	HY74543534	01/12/2019
Drums	E42232343	01/12/2019
Fire Extinguisher	J65654654	01/12/2019
Fire Extinguisher	H65655 <sup>th</sup>	01/12/2019
Guitar Amp	D45533	01/12/2019
Keyboard	D4543232	01/12/2019
Laptop	H345732113	01/12/2019
Laptop	H5234543	01/12/2019
Laptop	H654654645	01/12/2019
Laptop	H23542345	01/12/2019
Laptop	H654645454645	01/12/2019
Microphone	G6644332	01/12/2019
Microphone	H77467565	01/12/2019
Piano	J865455	01/12/2019
Router	H...	01/12/2019

**Asset Value**

The Asset Value report shows the current Value of each asset in the Asset Manager system

**Pre Flight**

When you run the [Asset Value](#) report, you have the following pre-flight settings that will filter the report and effect the display of information on the report.



Click on each part of the window below to learn more about each function

Stocktake pre Report Setup

**Available Filters...**


Category	Status	Location
<input type="checkbox"/> Computer Equipment <input type="checkbox"/> Mobiles <input type="checkbox"/> Furniture <input type="checkbox"/> Fire Extinguishers <input type="checkbox"/> Audio Equipment <input type="checkbox"/> Musical Instruments <input type="checkbox"/> Cameras	<input type="checkbox"/> In Use <input type="checkbox"/> In Storage <input type="checkbox"/> Disposed Of	<input type="checkbox"/> Church Office <input type="checkbox"/> Worship Hall <input type="checkbox"/> Meeting Areas <input type="checkbox"/> Sunday School <input type="checkbox"/> Youth Hall

Filter on Added Date  
 24/06/2019 To 24/06/2019

Filter on Acquisition Date  
 24/06/2019 To 24/06/2019

Filter on Warranty Expiry Date  
 24/06/2019 To 24/06/2019





Filter on Next Compliance Date  
 24/06/2019 To 24/06/2019

Asset Name  Used By  

Serial #  Asset Tag

Display 'Serial #' in Report  
 Display 'Asset Tag' in Report

Ignore all Assets of Zero Value

Pre Tag Assets 
 Help 
 Reset 
 Cancel 
 Continue 

### Filters

Tick the specific Category, Status or Location combinations you are interested in.

If you want to see all assets on the report, do NOT tick any items here.

Category	Status	Location
<input type="checkbox"/> Computer Equipment <input type="checkbox"/> Mobiles <input type="checkbox"/> Furniture <input type="checkbox"/> Fire Extinguishers <input type="checkbox"/> Audio Equipment <input type="checkbox"/> Musical Instruments <input type="checkbox"/> Cameras	<input type="checkbox"/> In Use <input type="checkbox"/> In Storage <input type="checkbox"/> Disposed Of	<input type="checkbox"/> Church Office <input type="checkbox"/> Worship Hall <input type="checkbox"/> Meeting Areas <input type="checkbox"/> Sunday School <input type="checkbox"/> Youth Hall

### Date Filters

Tick the date you want to filter on and use the drop down lists to select the date range for the selected filter. If you tick more than one date, there is a likelihood that no data will be displayed due to multiple dates having to be inside your search range to find a result.

<input checked="" type="checkbox"/> Filter on Added Date	<input checked="" type="checkbox"/> Filter on Acquisition Date
24/06/2019  To 24/06/2019 	24/06/2019  To 24/06/2019 
<input checked="" type="checkbox"/> Filter on Warranty Expiry Date	<input checked="" type="checkbox"/> Filter on Next Compliance Date
24/06/2019  To 24/06/2019 	24/06/2019  To 24/06/2019 

**Asset Name**

Enter a name of an asset to find for your report.

Asset Name

**Serial #**

Enter a Serial Number to search for.

Serial #

**Used By**

Enter a Name or use the People Button to find a name to search on.

Used By  

**Asset Tag**

Enter an Asset Tag to search for to include on your report

Asset Tag

**Display Options**

Choose to include the Serial Number or the Asset Tag in the report.

- Display 'Serial #' in Report  
 Display 'Asset Tag' in Report

**Ignore Zero Value**

As this is an Asset Valuation Report, Tick the option to only show assets with a Value on the resulting report.


Ignore all Assets of Zero Value

**Pre Tag Assets**

Tick this option for Pastoral Care to display a list of assets that will be on the report, and you can further control what goes on the report by tagging or un-tagging assets as needed.


Pre Tag Assets

**Reset**

Reset 

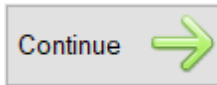
Press this to reset the Pre-Flight window to default settings

**Cancel**

Cancel 

Press this to cancel the selected report.

**Continue**



Press this to produce the selected report.

**Report**

Shown below is a sample Assets Valuation report.

<b>Assets Value</b>		
<b>Asset</b>	<b>Serial #</b>	<b>Value</b>
Audio Mixing Desk	T74564554	\$4,500.00
Camer SLR	HY74543534	\$2,000.00
Drums	E42232343	\$1,000.00
Fire Extinguisher	J65654654	\$150.00
Fire Extinguisher	H656555	\$300.00
Guitar	F55523332	\$500.00
Guitar Amp	D45533	\$1,000.00
Keyboard	D4543232	\$2,000.00
Laptop	H345732113	\$1,000.00
Laptop	H5234543	\$1,200.00
Laptop	H654654645	\$1,100.00
Laptop	H23542345	\$1,200.00
Laptop	H654645454645	\$1,600.00
Microphone	H77467565	\$250.00
Microphone	G6644332	\$300.00
Mobile	GT64322234	\$800.00
Mobile	HY773345	\$900.00
Piano	J865455	\$1,200.00
Router	HU845433	\$1,500.00
Video Camera	FT442322	\$4,000.00
	<b>Total Value:</b>	<b>\$26,500.00</b>

**Stocktake**

The stocktake report is used to show you the status of any stocktake for Assets already recorded.

**Pre Flight**


Shown below are the pre-flight settings for the Stocktake report.





Click on each part of the window below to learn more about each function

Assets Load

Stocktake Date  
01/01/2019

Continue 

Cancel 

Help 





Dont include assets added after stocktake date

Display 'Serial #' in StockTake       Show all Assets  
 Display 'Asset Tag' in Stocktake       Only show Assets not Located

**Available Filters...**

Category	Status	Location
<input type="checkbox"/> In Use	<input type="checkbox"/> Computer Equipment	<input type="checkbox"/> Church Office
<input type="checkbox"/> In Storage	<input type="checkbox"/> Mobiles	<input type="checkbox"/> Worship Hall
<input type="checkbox"/> Disposed Of	<input type="checkbox"/> Furniture	<input type="checkbox"/> Meeting Areas
	<input type="checkbox"/> Fire Extinguishers	<input type="checkbox"/> Sunday School
	<input type="checkbox"/> Audio Equipment	<input type="checkbox"/> Youth Hall
	<input type="checkbox"/> Musical Instruments	
	<input type="checkbox"/> Cameras	

Filter on Added Date       Filter on Acquisition Date

26/06/2019  To 26/06/2019      
 26/06/2019  To 26/06/2019 

**Stocktake Date**

Select a single date that you want to show the stocktaking results for.

01/01/2019

**Dont Include...**

Tick this option to exclude assets that have been added after a stocktake date.

Dont include assets added after stocktake date

**Display Options**

Choose to display either the Serial Number or the Asset Tag in the report.

Display 'Serial #' in StockTake  
 Display 'Asset Tag' in Stocktake

Choose to show all assets on the report date, or only those assets not located.



- Show all Assets  
 Only show Assets not Located

#### Available Filters

Tick the specific Category, Status or Location combinations you are interested in.

If you want to see all assets on the report, do NOT tick any items here.

Category	Status	Location
<input type="checkbox"/> Computer Equipment <input type="checkbox"/> Mobiles <input type="checkbox"/> Furniture <input type="checkbox"/> Fire Extinguishers <input type="checkbox"/> Audio Equipment <input type="checkbox"/> Musical Instruments <input type="checkbox"/> Cameras	<input type="checkbox"/> In Use <input type="checkbox"/> In Storage <input type="checkbox"/> Disposed Of	<input type="checkbox"/> Church Office <input type="checkbox"/> Worship Hall <input type="checkbox"/> Meeting Areas <input type="checkbox"/> Sunday School <input type="checkbox"/> Youth Hall

#### Filter on Added Date

Tick this option and put in a date range to find assets that had their added date between the dates you enter, and are in the selected stocktake.

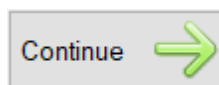
Filter on Added Date  
 26/06/2019 To 26/06/2019

#### Filter on Acquisition Date

Tick this option and put in a date range to find assets that had their Acquisition date between the dates you enter, and are in the selected stocktake.

Filter on Acquisition Date  
 26/06/2019 To 26/06/2019

#### Continue



Press this to produce the selected report.

#### Report

The Stocktake report is shown below. This shows the assets that have been found on the selected stocktake date.

## Stocktake Report for 01/01/2019

Asset	Serial #	Located
Audio Mixing Desk	T74564554	<input checked="" type="checkbox"/>
Camera SLR	HY74543534	<input checked="" type="checkbox"/>
Drums	E42232343	<input checked="" type="checkbox"/>
Fire Extinguisher	J65654654	<input checked="" type="checkbox"/>
Fire Extinguisher	H656555	<input checked="" type="checkbox"/>
Guitar	F55523332	<input checked="" type="checkbox"/>
Guitar Amp	D45533	<input checked="" type="checkbox"/>
Keyboard	D4543232	<input checked="" type="checkbox"/>
Laptop	H345732113	<input checked="" type="checkbox"/>
Laptop	H5234543	<input checked="" type="checkbox"/>
Laptop	H654654645	<input checked="" type="checkbox"/>
Laptop	H23542345	<input checked="" type="checkbox"/>
Laptop	H654645454645	<input checked="" type="checkbox"/>
Microphone	H77467565	<input checked="" type="checkbox"/>
Microphone	G6644332	<input checked="" type="checkbox"/>
Mobile	GT64322234	<input checked="" type="checkbox"/>
Mobile	HY773345	<input checked="" type="checkbox"/>
Piano	J865455	<input checked="" type="checkbox"/>
Router	HU845433	<input checked="" type="checkbox"/>
Video Camera	FT442322	<input checked="" type="checkbox"/>
<b>Total Assets Located:</b>		20
<b>Total Not Located:</b>		0

### Asset Tag Labels

The Asset Tag labels report will print out a report of all asset Tags (Identification tags) on a label that has been defined in your Global Label Setup area.

(See [Mailing Labels](#) for the setup area for defining labels for this area to use)

### Pre Flight

Shown below are the pre-flight settings for the Asset Tag Labels report.



Click on each part of the window below to learn more about each function

Asset Filters Before Running the Report

**Available Filters...**

Category	Status	Location
<input type="checkbox"/> Computer Equipment <input type="checkbox"/> Mobiles <input type="checkbox"/> Furniture <input type="checkbox"/> Fire Extinguishers <input type="checkbox"/> Audio Equipment <input type="checkbox"/> Musical Instruments <input type="checkbox"/> Cameras	<input type="checkbox"/> In Use <input type="checkbox"/> In Storage <input type="checkbox"/> Disposed Of	<input type="checkbox"/> Church Office <input type="checkbox"/> Worship Hall <input type="checkbox"/> Meeting Areas <input type="checkbox"/> Sunday School <input type="checkbox"/> Youth Hall

Filter on Added Date  
 28/06/2019 To 28/06/2019

Filter on Acquisition Date  
 28/06/2019 To 28/06/2019

Filter on Warranty Expiry Date  
 28/06/2019 To 28/06/2019

Filter on Next Compliance Date  
 28/06/2019 To 28/06/2019

---

Label to Run...

Test

Start the report from label position number 1

**Available Filters**

Tick the specific Category, Status or Location combinations you are interested in.



If you want to see all assets on the report, do NOT tick any items here.

Category	Status	Location
<input type="checkbox"/> Computer Equipment <input type="checkbox"/> Mobiles <input type="checkbox"/> Furniture <input type="checkbox"/> Fire Extinguishers <input type="checkbox"/> Audio Equipment <input type="checkbox"/> Musical Instruments <input type="checkbox"/> Cameras	<input type="checkbox"/> In Use <input type="checkbox"/> In Storage <input type="checkbox"/> Disposed Of	<input type="checkbox"/> Church Office <input type="checkbox"/> Worship Hall <input type="checkbox"/> Meeting Areas <input type="checkbox"/> Sunday School <input type="checkbox"/> Youth Hall

**Filter on Added Date**

Tick this option and put in a date range to find assets that had their added date between the dates you enter, and are in the selected stocktake.



Filter on Added Date

26/06/2019  To 26/06/2019 

**Filter on Acquisition Date**

Tick this option and put in a date range to find assets that had their Acquisition date between the dates you enter, and are in the selected stocktake.



Filter on Acquisition Date

26/06/2019  To 26/06/2019 

**Filter on Warranty Expiry Date**

Tick this option and put in a date range to find assets that had their Acquisition date between the dates you enter, and are in the selected stocktake.



Filter on Acquisition Date

26/06/2019  To 26/06/2019 

**Filter on Next Compliance Date**

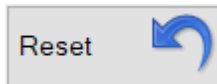
Tick this option and put in a date range to find assets that had their Acquisition date between the dates you enter, and are in the selected stocktake.

Filter on Acquisition Date

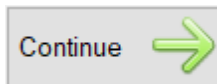
26/06/2019  To 26/06/2019 

**Labels To Run**

Select the Label type to run and the position on the sheet to start the label run from.

**Reset**

Press this to reset the Pre-Flight window to default settings

**Continue**





Press this to produce the selected report. The [Select Assets](#) window opens just before the report giving you a further option to de-select some assets to not include on the report.

**Select Assets**

Tag any assets you want included on the report. By Default, all assets loaded are tagged ready for printing.

Assets Available for Labels Report

Tag	Asset	Asset Tag	Serial #
<input checked="" type="checkbox"/>	Audio Mixing Desk	7	T74564554
<input checked="" type="checkbox"/>	Camer SLR	16	HY74543534
<input checked="" type="checkbox"/>	Drums	15	E42232343
<input checked="" type="checkbox"/>	Fire Extinguisher	11	J65654654
<input checked="" type="checkbox"/>	Fire Extinguisher	10	H656555
<input checked="" type="checkbox"/>	Guitar	12	F55523332
<input checked="" type="checkbox"/>	Guitar Amp	13	D45533
<input checked="" type="checkbox"/>	Keyboard	14	D4543232
<input checked="" type="checkbox"/>	Laptop	1	H345732113
<input checked="" type="checkbox"/>	Laptop	5	H5234543
<input checked="" type="checkbox"/>	Laptop	4	H654654645
<input checked="" type="checkbox"/>	Laptop	3	H23542345
<input checked="" type="checkbox"/>	Laptop	2	H654645454645
<input checked="" type="checkbox"/>	Microphone	9	H77467565
<input checked="" type="checkbox"/>	Microphone	8	G6644332
<input checked="" type="checkbox"/>	Mobile	19	GT64322234
<input checked="" type="checkbox"/>	Mobile	18	HY773345
<input checked="" type="checkbox"/>	Piano	14	J865455
<input checked="" type="checkbox"/>	Router	16	HU845433
<input checked="" type="checkbox"/>	Video Camera	17	FT442322

Cancel  Help  View  Continue 

**Report**

Shown below is a sample Asset Tag Label Report.

Audio Mixing Desk Asset Tag: 7 Serial:T74564554	Laptop Asset Tag: 1 Serial:H345732113
Camer SLR Asset Tag: 16 Serial:HY74543534	Laptop Asset Tag: 5 Serial:H5234543
Drums Asset Tag: 15 Serial:E42232343	Laptop Asset Tag: 4 Serial:H654654645
Fire Estinguisher Asset Tag: 54 Serial:H235	Laptop Asset Tag: 3 Serial:H235

**Asset Notes**

The Asset Notes report is a report that displays basic Asset Information, as well as the notes field.

**Pre Flight**

Shown below are the pre-flight settings for the Asset Tag Notes report.



Click on each part of the window below to learn more about each function

Asset Filters Before Running the Report

**Available Filters...**

Category	Status	Location
<input type="checkbox"/> Computer Equipment <input type="checkbox"/> Mobiles <input type="checkbox"/> Furniture <input type="checkbox"/> Fire Extinguishers <input type="checkbox"/> Audio Equipment <input type="checkbox"/> Musical Instruments <input type="checkbox"/> Cameras	<input type="checkbox"/> In Use <input type="checkbox"/> In Storage <input type="checkbox"/> Disposed Of	<input type="checkbox"/> Church Office <input type="checkbox"/> Worship Hall <input type="checkbox"/> Meeting Areas <input type="checkbox"/> Sunday School <input type="checkbox"/> Youth Hall

Filter on Added Date  
 29/06/2019 To 29/06/2019

Filter on Acquisition Date  
 29/06/2019 To 29/06/2019

Filter on Warranty Expiry Date  
 29/06/2019 To 29/06/2019

Filter on Next Compliance Date  
 29/06/2019 To 29/06/2019

Asset Name  Used By

Serial #  Asset Tag

Display 'Serial #' in Report   
  Display 'Asset Tag' in Report

Pre Tag Assets 
[Help ?](#)

**Available Filters**

Tick the specific Category, Status or Location combinations you are interested in.



If you want to see all assets on the report, do NOT tick any items here.

Category	Status	Location
<input type="checkbox"/> Computer Equipment <input type="checkbox"/> Mobiles <input type="checkbox"/> Furniture <input type="checkbox"/> Fire Extinguishers <input type="checkbox"/> Audio Equipment <input type="checkbox"/> Musical Instruments <input type="checkbox"/> Cameras	<input type="checkbox"/> In Use <input type="checkbox"/> In Storage <input type="checkbox"/> Disposed Of	<input type="checkbox"/> Church Office <input type="checkbox"/> Worship Hall <input type="checkbox"/> Meeting Areas <input type="checkbox"/> Sunday School <input type="checkbox"/> Youth Hall

**Filter on Added Date**

Tick this option and put in a date range to find assets that had their added date between the dates you enter, and are in the selected stocktake.



Filter on Added Date

26/06/2019  To 26/06/2019 

**Filter on Acquisition Date**

Tick this option and put in a date range to find assets that had their Acquisition date between the dates you enter, and are in the selected stocktake.



Filter on Acquisition Date

26/06/2019  To 26/06/2019 

**Filter on Warranty Expiry Date**

Tick this option and put in a date range to find assets that had their Acquisition date between the dates you enter, and are in the selected stocktake.



Filter on Acquisition Date

26/06/2019  To 26/06/2019 

**Filter on Next Compliance Date**

Tick this option and put in a date range to find assets that had their Acquisition date between the dates you enter, and are in the selected stocktake.

Filter on Acquisition Date

26/06/2019  To 26/06/2019 

**Asset Name**

Enter a name of an asset to find for your report.

Asset Name

**Serial #**

Enter a Serial Number to search for.

Serial #

**Used By**

Enter a Name or use the People Button to find a name to search on.

Used By  

**Asset Tag**

Enter an Asset Tag to search for to include on your report


Asset Tag

**Display Options**

Choose to include the Serial Number or the Asset Tag in the report.

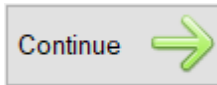
- Display 'Serial #' in Report
- Display 'Asset Tag' in Report

**Reset**

Reset 



Press this to reset the Pre-Flight window to default settings  
**Continue**



Press this to produce the selected report.  
**Report**

Shown below is the Asset Notes Report

### Assets Notes Report

Audio Mixing Desk <b>Notes:</b> 24 Channel Mixer	<b>Serial #:</b> T74564554
Laptop <b>Notes:</b> Marion often takes the Laptop home to continue doing our office work	<b>Serial #:</b> H345732113
Mobile <b>Notes:</b> Currently on a Telstra Mobile plan	<b>Serial #:</b> GT64322234

### Asset Images

The Asset Images report is a report that displays basic Asset Information, as well as the Image of the asset.

The [Pre Flight](#) settings for this report are the same as the Notes report.

Show below is a sample Asset Image Report.

## Assets Report

### Audio Mixing Desk



Serial # T74564554  
 Category: Audio Equipment  
 Status: In Use  
 Location: Worship Hall  
 Used By: Ernie Blackeby  
 Next Compliance: 01/12/2019

### Camera SLR



Serial # HY74543534  
 Category: Cameras  
 Status: In Use  
 Location: Church Office  
 Used By: Sue Knight  
 Next Compliance: 01/12/2019

### Drums



Serial # E42232343  
 Category: Musical Instruments  
 Status: In Use  
 Location: Worship Hall  
 Used By: Christopher Lynch  
 Next Compliance: 01/12/2019

## Column Reports

The Asset Column Reports come in 3, 4 and 5 column layouts, in a variety of Landscape or Portrait styles.

The [Pre Flight](#) options are the same for each report, expect for the number of columns that can be configured.

### Pre Flight

Shown below are the pre-flight settings for the Asset Column reports.



Click on each part of the window below to learn more about each function

Asset Filters Before Running the Report

**Available Filters...**

Category	Status	Location
<input type="checkbox"/> Computer Equipment <input type="checkbox"/> Mobiles <input type="checkbox"/> Furniture <input type="checkbox"/> Fire Extinguishers <input type="checkbox"/> Audio Equipment <input type="checkbox"/> Musical Instruments <input type="checkbox"/> Cameras	<input type="checkbox"/> In Use <input type="checkbox"/> In Storage <input type="checkbox"/> Disposed Of	<input type="checkbox"/> Church Office <input type="checkbox"/> Worship Hall <input type="checkbox"/> Meeting Areas <input type="checkbox"/> Sunday School <input type="checkbox"/> Youth Hall

Filter on Added Date  
 29/06/2019 To 29/06/2019

Filter on Acquisition Date  
 29/06/2019 To 29/06/2019

Filter on Warranty Expiry Date  
 29/06/2019 To 29/06/2019

Filter on Next Compliance Date  
 29/06/2019 To 29/06/2019

Asset Name  Used By

Serial #  Asset Tag

**Fields available for Columns...**

Column 1	Column 2	Column 3
Category	Location	Status

Pre Tag Assets 
 Help 
 Reset 
 Cancel 
 Continue

**Available Filters**

Tick the specific Category, Status or Location combinations you are interested in.



If you want to see all assets on the report, do NOT tick any items here.

Category	Status	Location
<input type="checkbox"/> Computer Equipment <input type="checkbox"/> Mobiles <input type="checkbox"/> Furniture <input type="checkbox"/> Fire Extinguishers <input type="checkbox"/> Audio Equipment <input type="checkbox"/> Musical Instruments <input type="checkbox"/> Cameras	<input type="checkbox"/> In Use <input type="checkbox"/> In Storage <input type="checkbox"/> Disposed Of	<input type="checkbox"/> Church Office <input type="checkbox"/> Worship Hall <input type="checkbox"/> Meeting Areas <input type="checkbox"/> Sunday School <input type="checkbox"/> Youth Hall

**Filter on Added Date**



Tick this option and put in a date range to find assets that had their added date between the dates you enter, and are in the selected stocktake.

Filter on Added Date

 26/06/2019  To 26/06/2019 
**Filter on Acquisition Date**


Tick this option and put in a date range to find assets that had their Acquisition date between the dates you enter, and are in the selected stocktake.

 Filter on Acquisition Date

 26/06/2019  To 26/06/2019 
**Filter on Warranty Expiry Date**


Tick this option and put in a date range to find assets that had their Acquisition date between the dates you enter, and are in the selected stocktake.

 Filter on Acquisition Date

 26/06/2019  To 26/06/2019 
**Filter on Next Compliance Date**

Tick this option and put in a date range to find assets that had their Acquisition date between the dates you enter, and are in the selected stocktake.

 Filter on Acquisition Date

 26/06/2019  To 26/06/2019 
**Asset Name**

Enter a name of an asset to find for your report.

 Asset Name 
**Serial #**

Enter a Serial Number to search for.

 Serial # 
**Used By**

Enter a Name or use the People Button to find a name to search on.


 Used By  
**Asset Tag**

Enter an Asset Tag to search for to include on your report


 Asset Tag 
**Fields Available for Columns**

For what ever number of columns you have selected, there are options here to select the information you want to appear in each column.


Column 1

Category 

Column 2

Location 

Column 3

Status 

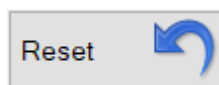
### Pre-Tag Assets

Tag any assets you want included on the report. By Default, all assets loaded are tagged ready for printing.

Tag Assets for sending to Report

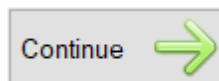
Tag	Asset Tag	Asset Tag
<input checked="" type="checkbox"/>	Audio Mixing Desk	7
<input checked="" type="checkbox"/>	Camer SLR	16
<input checked="" type="checkbox"/>	Drums	15
<input checked="" type="checkbox"/>	Fire Extinguisher	11
<input checked="" type="checkbox"/>	Fire Extinguisher	10
<input checked="" type="checkbox"/>	Guitar	12
<input checked="" type="checkbox"/>	Guitar Amp	13
<input checked="" type="checkbox"/>	Keyboard	14
<input checked="" type="checkbox"/>	Laptop	1
<input checked="" type="checkbox"/>	Laptop	5
<input checked="" type="checkbox"/>	Laptop	4
<input checked="" type="checkbox"/>	Laptop	3
<input checked="" type="checkbox"/>	Laptop	2
<input checked="" type="checkbox"/>	Microphone	9
<input checked="" type="checkbox"/>	Microphone	8
<input checked="" type="checkbox"/>	Mobile	19
<input checked="" type="checkbox"/>	Mobile	18
<input checked="" type="checkbox"/>	Piano	14
<input checked="" type="checkbox"/>	Router	16
<input checked="" type="checkbox"/>	Video Camera	17

### Reset



Press this to reset the Pre-Flight window to default settings

### Continue



Press this to produce the selected report.

### Report

Shown below is a sample 3 Column report. The first column of Asset can not be modified and as such is not included in the count of columns.

#### Assets Column Report

Asset	Category	Location	Status
Audio Mixing Desk	Audio Equipment	Worship Hall	In Use
Camer SLR	Cameras	Church Office	In Use
Drums	Musical Instruments	Worship Hall	In Use
Fire Extinguisher	Fire Extinguishers	Worship Hall	In Use
Fire Extinguisher	Fire Extinguishers	Sunday School	In Use
Guitar	Musical Instruments	Worship Hall	In Use
Guitar Amp	Audio Equipment	Worship Hall	In Use
Keyboard	Musical Instruments	Worship Hall	In Use
Laptop	Computer Equipment	Church Office	In Use
Laptop	Computer Equipment	Church Office	In Use
Laptop	Computer Equipment	Church Office	In Use
Laptop	Computer Equipment	Church Office	In Use

### Check Lists

There are four different Check Lists. We have shown below Check List Format 1 as a sample. The [Pre Flight](#) window with reporting options is the same for Asset Notes report.

#### Sample Check List Report

#### Assets Checklist

Asset	Serial #													
Audio Mixing Desk	T74564554													
Camer SLR	HY74543534													
Drums	E42232343													
Fire Extinguisher	J65654654													
Fire Extinguisher	H656555													
Guitar	F55523332													
Guitar Amp	D45533													
Keyboard	D4543232													
Laptop	H345732113													
Laptop	H5234543													
Laptop	H654654645													
Laptop	H23542345													
Laptop	H654645454645													
Microphone	H77467565													
Microphone	G6644332													

### Statistics

There are three different Statistic Reports. We have shown below Category Analysis as an example. The [Pre Flight](#) window with reporting options is the same for Asset Notes report.

#### Sample Category Analysis Report

### Category Analysis

**Total Assets:** 20  
**Total Value of all Assets:** \$26,500.00  
**Total Items with Value added:** 20  
**Total Assets with Compliance:** 18

Category	Total	Value\$	Items with Value added	Assets With Compliance
Computer Equipment	6	\$7,600.00	6	6
Mobiles	2	\$1,700.00	2	0
Furniture	0	\$0.00	0	0
Fire Extinguishers	2	\$450.00	2	2
Audio Equipment	4	\$6,050.00	4	4
Musical Instruments	4	\$4,700.00	4	4
Cameras	2	\$6,000.00	2	2

# **Chapter**

---



**8**

***Explore Tab***



## Explore Tab

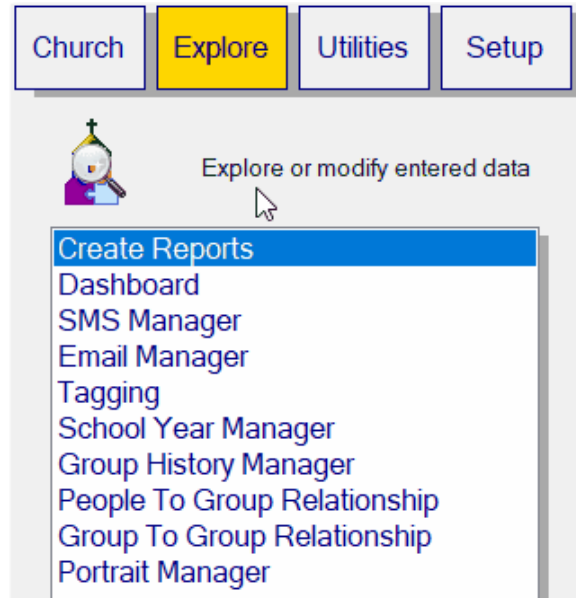
### Explore Introduction

#### 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

### 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.

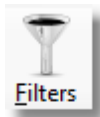
### Important Information

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



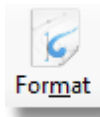
[Filters](#) in Pastoral Care are an extremely powerful tool in manipulating information and sorting it into useful chunks. Use Filters to output reports to selected groups of people, people in groups, ministries status's etc, and people not in groups etc.

### 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



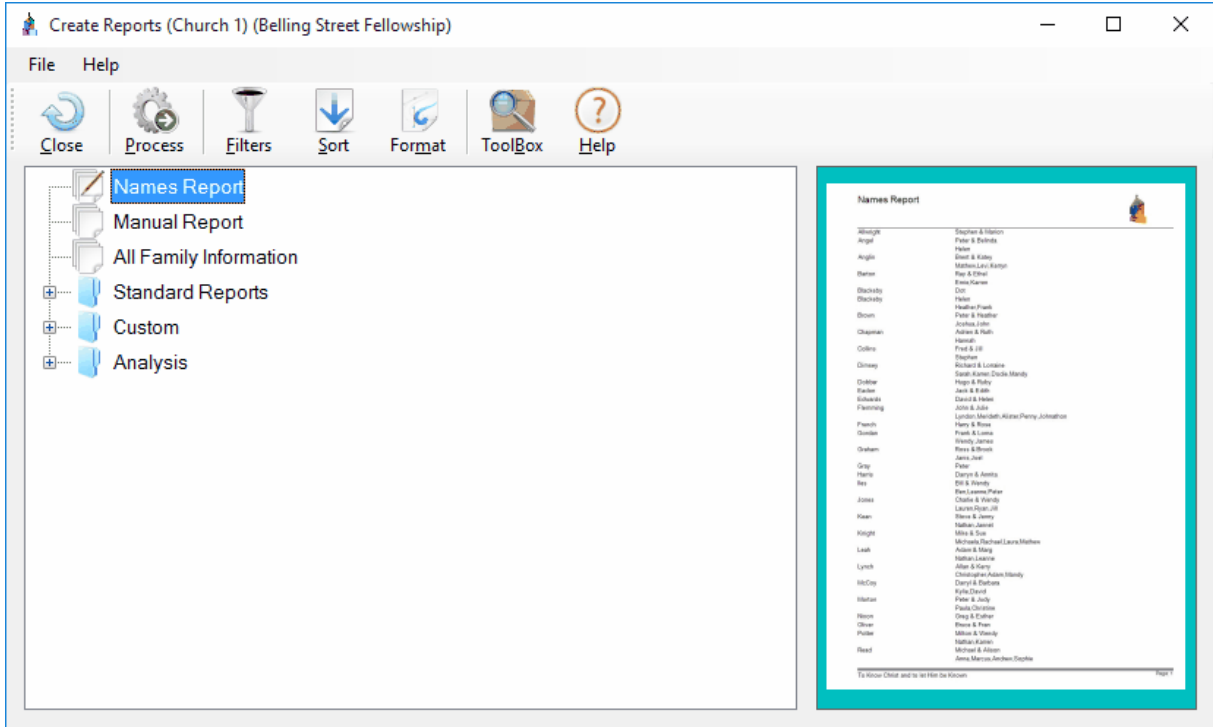
[Format](#) in Pastoral Care allows you to force formatting on all built in Pastoral Care reports, and all custom reports.

### 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

This area 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.

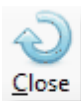
### Create Reports Toolbar



Click on each icon below to learn more about the Create Reports toolbar.



#### Close



Exit the Create Reports Area

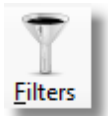
## Process



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.

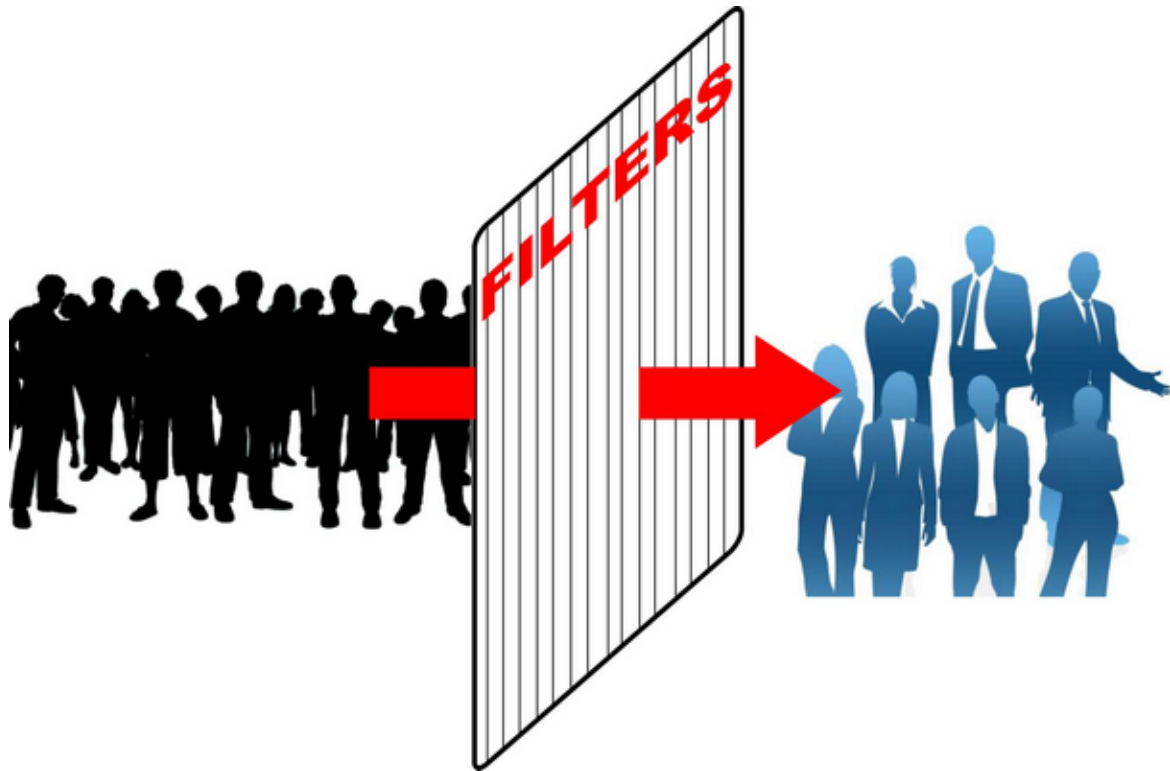
All these tasks and more can be achieved with the use of Filters.

[The Basic Filters Window](#)

[The Advanced Filters Window](#)

### 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.

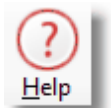


### Toolbox



Access the standard Pastoral Care [Toolbox](#)

### Help



Access the context sensitive help system.

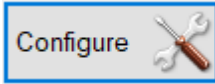
## The Basic Filters Window

New to Pastoral Care 14 is the Basic Filters Window. Anywhere that filters can be used, the Basic Filters window can be used for selecting your most common and quick filters.

See also [About Filters](#) for more information on how filters function.

Using the Configure button on this window allows you to select (tick) a number of filter areas to include on the Basic Filters window. Shown below we have configured the basic filters for Status, Individual Groups, and Active Ministry filters.

To select the filters that you want to use to locate people, simply tick those areas that you want to find people from. In the sample below, you could tick Elder and press Process to gather only Elders, or you could tick Elders and Preaching (from Status and Active Ministry) to gather anyone who is an Elder, and anyone who is a Preacher!



Press Configure to tick a list of categories that can be included in this view. In the example below Configure has been used to show Status, Individual Group and Active Ministry.

Filters

Close Process Basic Advanced Reset Help

**A person who is a part of at least one or more groups ticked will pass through the filters..**

Configure

Status	Individual Group	Active Ministry
<input type="checkbox"/> Deacon	<input type="checkbox"/> Bible Study 1	<input type="checkbox"/> Praise Leader
<input type="checkbox"/> Elder	<input type="checkbox"/> Bible Study 2	<input type="checkbox"/> Healing Gift
<input type="checkbox"/> Committed Attender	<input type="checkbox"/> Bible Study 3	<input type="checkbox"/> Prayer Team
<input type="checkbox"/> Occasional Attender	<input type="checkbox"/> Bible Study 4	<input type="checkbox"/> Communion Leader
	<input type="checkbox"/> Home Casserole Team	<input type="checkbox"/> Youth Leader
	<input type="checkbox"/> Cleaning Roster	<input type="checkbox"/> Sunday School Teacher
	<input type="checkbox"/> Youth Group 1	<input type="checkbox"/> Prophecy
	<input type="checkbox"/> Youth Group 2	<input type="checkbox"/> Door Team
	<input type="checkbox"/> Youth Group 3	<input type="checkbox"/> Follow Up Ministry
	<input type="checkbox"/> Property Maintenance	<input type="checkbox"/> Home Support
	<input type="checkbox"/> Ladies Home Group 1	<input type="checkbox"/> Preaching
	<input type="checkbox"/> Ladies Home Group 2	<input type="checkbox"/> Overhead Operator
	<input type="checkbox"/> Ladies Home Group 3	<input type="checkbox"/> Street Outreach Team
	<input type="checkbox"/> Aerobics Outreach	<input type="checkbox"/> Tape Ministry
	<input type="checkbox"/> Catering Staff	
	<input type="checkbox"/> Home Group 1	
	<input type="checkbox"/> Home Group 2	
	<input type="checkbox"/> Home Group 3	
	<input type="checkbox"/> Mens Fellowship	
	<input type="checkbox"/> Basket Ball Team	
	<input type="checkbox"/> Building Maintenance	
	<input type="checkbox"/> Morning Tea Team	
	<input type="checkbox"/> Camp Planners	

### The Advanced Filters Window

The standard Advanced 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.

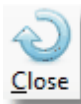
**Toolbar**



The Sort Window Toolbar is shown below. Click on each item to learn more.



**Close**



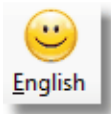
Close the Sort Window saving any settings for use.

**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.

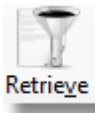
## Save



The Save button on the Sort Window simply saves all Sort Options as a favorite for future use.

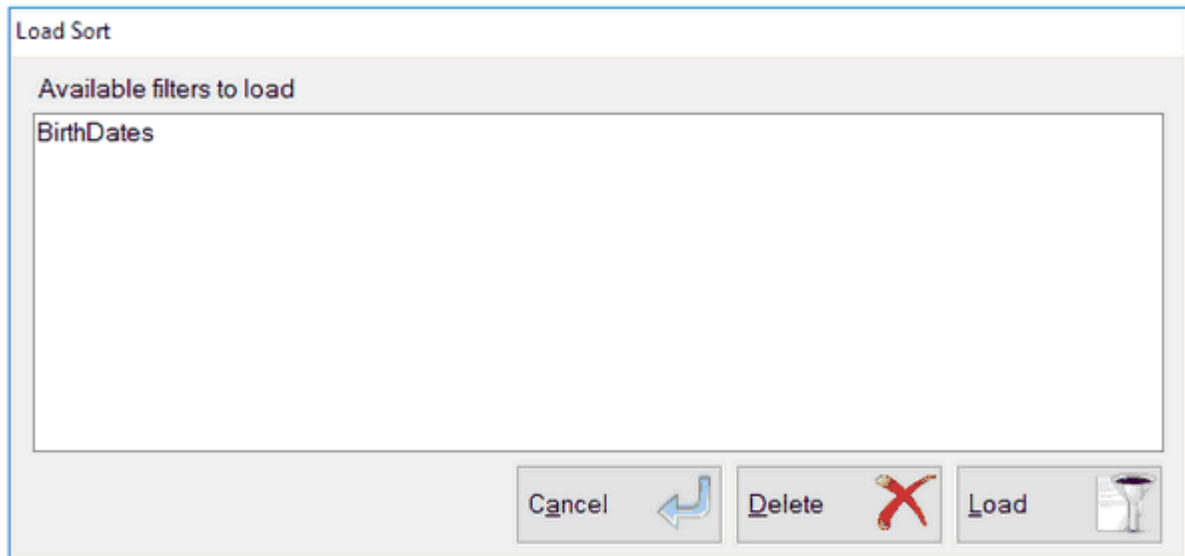
Saved Sorts can be used by all users of Pastoral Care. A Saved Sort cannot be edited, however you can load one, and save it under another name, then use the [Retrieve](#) window to delete the older Sort settings.

## 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





### Filter On



Click on each of the Filter On options below 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

**Individual Condition...**

Include the Following Individual Conditions

Active     Privacy     Prospect

Archived     Contacts     Deceased

Filter on chosen conditions (Optional)

Privacy Request  
Active People

## 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

**Family Condition...**

Include the Following 'Family Conditions'

Active     Privacy

Prospect     Archived

Filter on chosen conditions (Optional)

Privacy Request Families  
Active Families

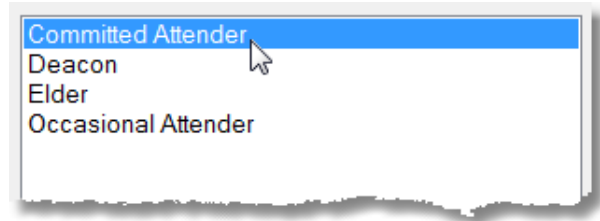
**Status**

**Status Filters**

To add a filter for a person's (individual) status, follow these simple steps.

**Step 1**

Select the Status to filter on.

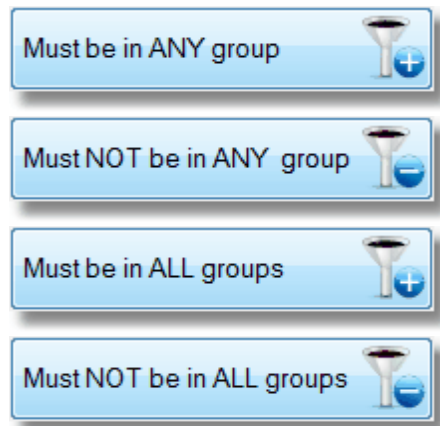


**Step 2**

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



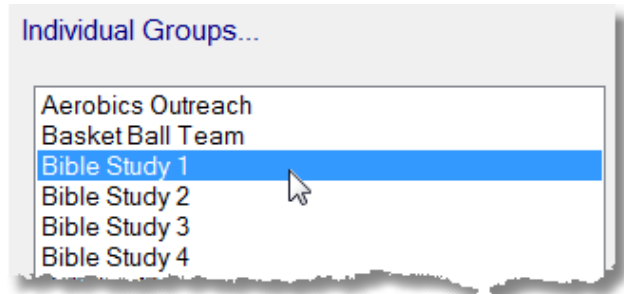
**Individual Groups**

**Individual Group Filters**

To add a filter for a person's (individual) group that they are participating in, follow these simple steps.

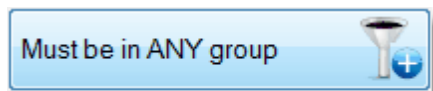
**Step 1**

Select the Individual Group to filter on. The example we have clicked on is Bible Study 1



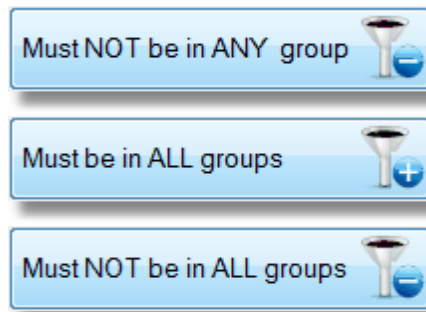
**Step 2**

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.

#### Ministry Active...

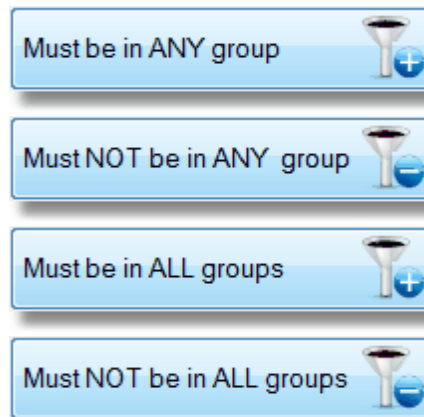
Praise Leader  
Healing Gift  
Prayer Team  
Communion Leader  
Youth Leader

#### 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



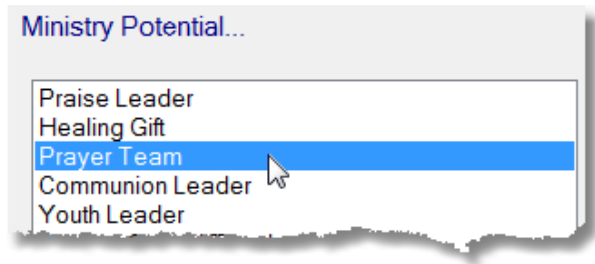
## Ministry Potential

### 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.

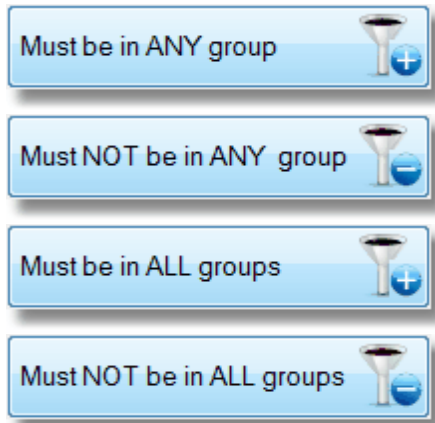


**Step 2**

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



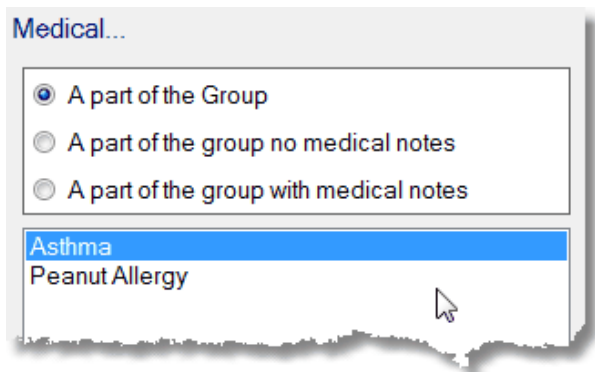
**Medical**

**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.

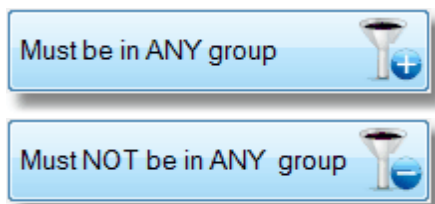


**Step 2**

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

Must be in ALL groups



Must NOT be in ALL groups



## 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.

#### Relationships...

Real Father  
 Step Father  
 Real Mother  
 Step Mother  
 Step Son  
 Step Daughter  
 Grandparent

#### Step 2

With your item to filter on selected, press the Filter Logic button needed. Example filter Logic Buttons are shown right.

Must be in ANY group



Must NOT be in ANY group



Must be in ALL groups



Must NOT be in ALL groups



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**

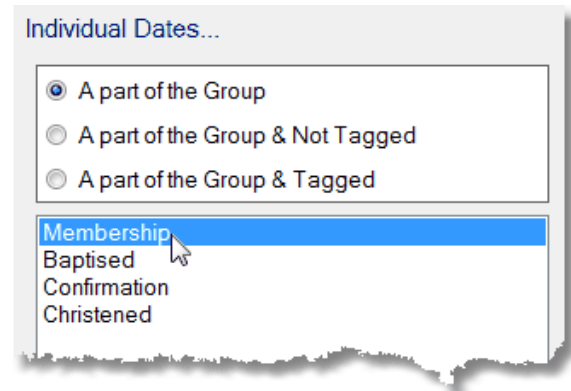
They have a date recorded or a Tag, or both

**Part of Group & Not Tagged**

Date recorded and no Tag

**Part of Group & Tagged**

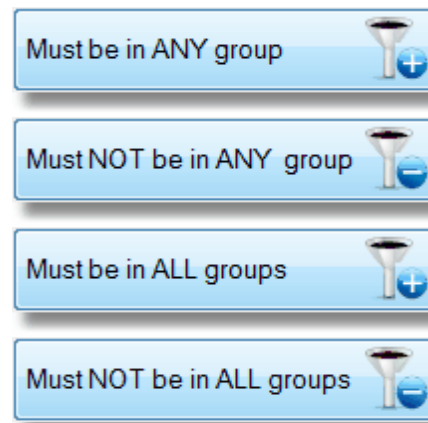
Date recorded and Tagged

**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

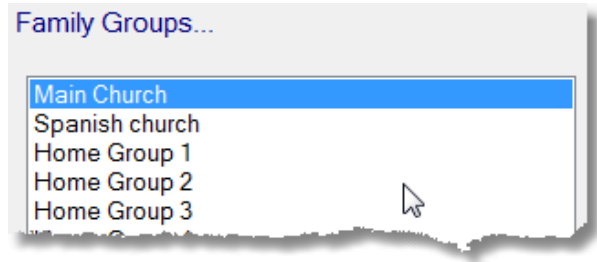
**Family Groups****Family Group Filters**

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.

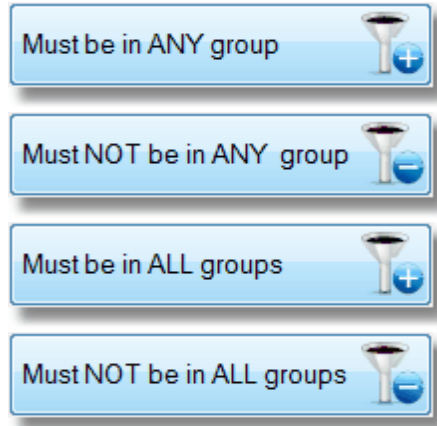


**Step 2**

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



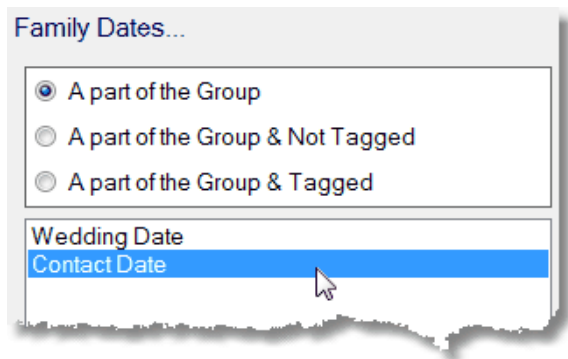
**Family Dates**

**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**

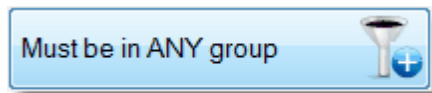
Date recorded and no Tag

**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

Must NOT be in ANY group



Must be in ALL groups



Must NOT be in ALL groups



## 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.

SMS List...

All Church List  
Leadership List  
Youth List



#### 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

Must be in ANY group



Must NOT be in ANY group



Must be in ALL groups



Must NOT be in ALL groups



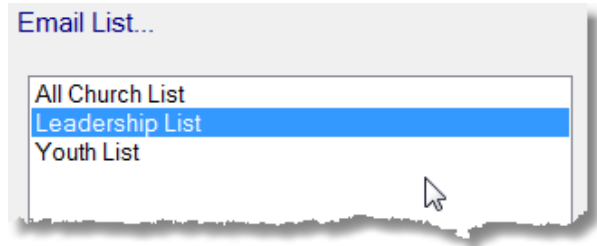
## Email List

### 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.

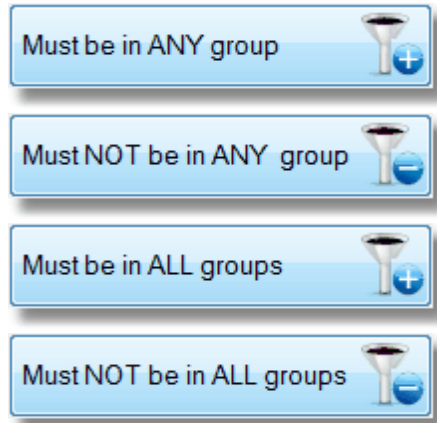


**Step 2**

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



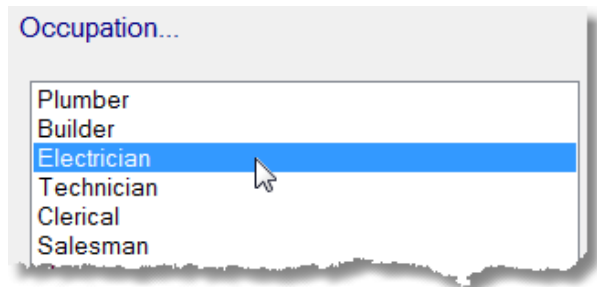
**Occupation**

**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.

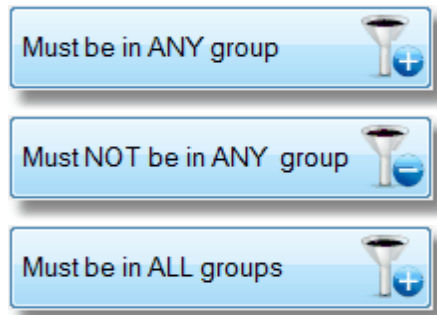


**Step 2**

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



Must NOT be in ALL groups



## 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.

Suburb...

Gisborne  
Keilor Downs  
Keilor  
Keilor Heights  
Melton  
Riddells Creek  
Sydenham  
Riddells Creek

#### 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

Must be in ANY group



Must NOT be in ANY group



Must be in ALL groups



Must NOT be in ALL groups



## 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.

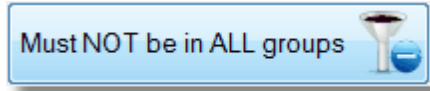
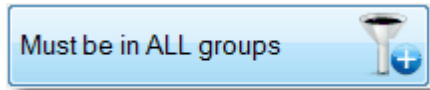
Must be in ANY group



Must NOT be in ANY group



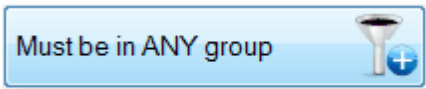
Click on each button to learn about each of the logic operations these buttons control.



Filters can be added together for really powerful reporting. Shown below are a few examples of Combination Filters:

Description	Logic Operation	Filter Parameter
<b>Find all Regular Attenders at church who are not in any home groups</b>	OR+	Status - Regular Attender
	AND-	Individual Group - Home Group 1
	AND-	Individual Group - Home Group 2
	AND-	Individual Group - Home Group 3 etc
<b>Find all Home Group Members with a known medical condition</b>	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+**

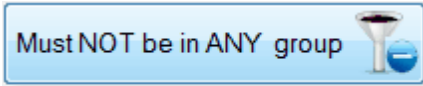


The OR+ Logic Operator means "Must be in ANY group" In practice, if you put in a filter of OR+ Members with OR+ Elders and OR+ Youth Leaders then the people passed through the filters will be:

- 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.

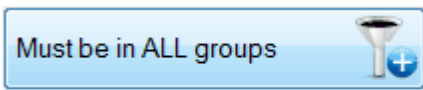
### OR-



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+

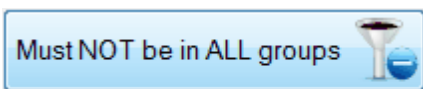


The AND+ Logic Operator means "Must be in ALL groups" In practice, if you put in a filter of AND+ Members with AND+ Baptised the people passed through the filters would be:

- 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:

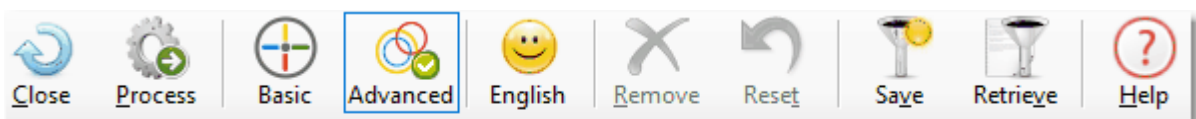
- All people in your church who are not Members, and are also not Born Again

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



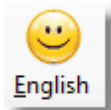
Exit the Filters Window

### 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

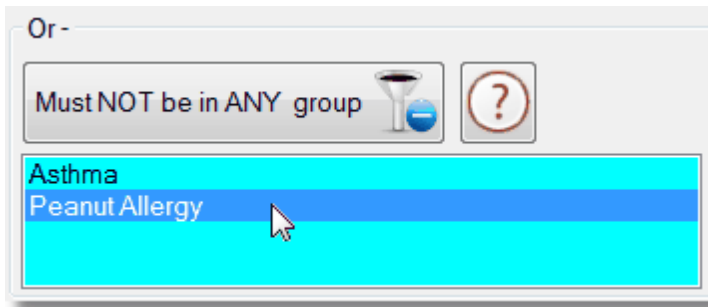
Active Ministry = Sunday School Teacher

### 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](#).

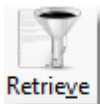
### Save



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.

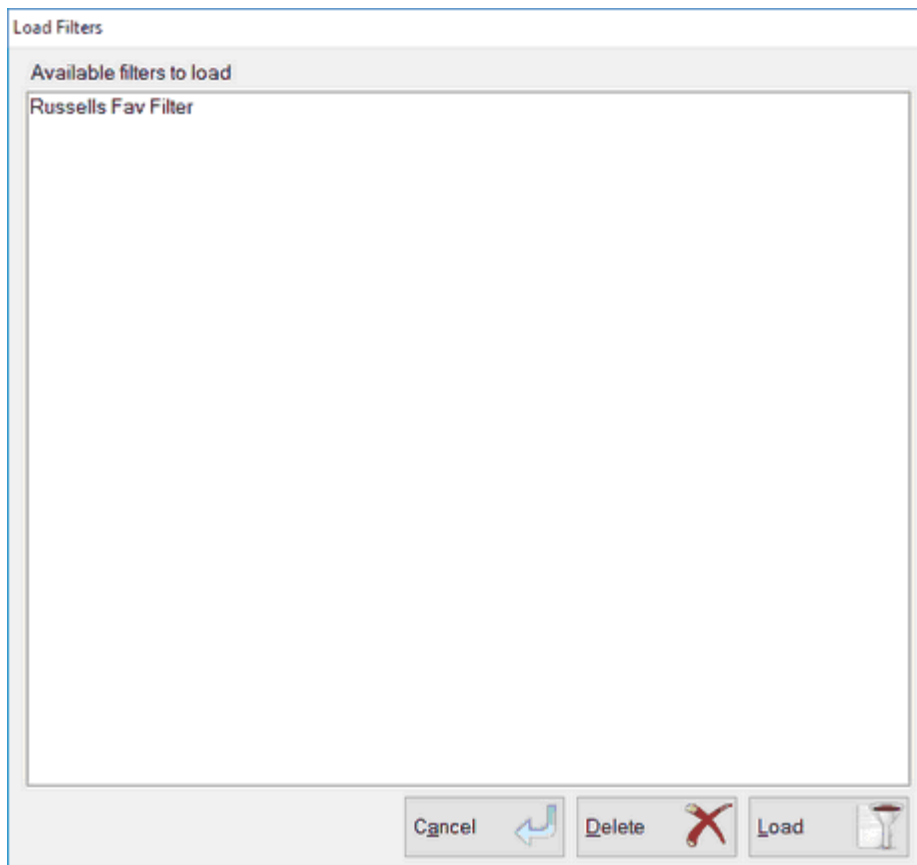
Saved filters can be used by all users of Pastoral Care. A Saved Filter cannot be edited, however you can load one, and save it under another name, then use the [Retrieve](#) window to delete the older filter.

### Retrieve

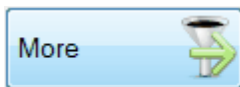


Use Retrieve to load a set of filters you have saved for re-use. The following window is displayed. Select the filter to use and press Load, or select a filter and press Delete to remove that selected saved filter.





## 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.....

**Gender**

Enable Gender Filter     Unknown     Male     Female

**Marital Status**

Enable Marital Filter

Single Adult    Adult Age 18

Adult Age based on today's date being  
Sunday . 8 November 2015

**Adult / Child**

Enable Adult / Child Filter

Adult     Child    Adult Age 18

Age calculated based on today's date being:  
Sunday . 8 November 2015

**Mapping**

Enable Mapping

Find people on a specific map

Map    Co. #1 A1    Co. #2 K12

Find people within a set distance from a reference point

Landmark    Map    Ref    Km 0    To 100

Add distance found to 'Surname'

**Family Position Load**

Enable Family Position Load

Load only Adults

Load only Children

Load Both Adults if they Both exist

Load all Adults if a Child passes through filters (Child not shown)

Load all Children if an Adult passes through filters (Adult not shown)

Load all Adults and the Child if a Child passes through filters

Load all Children and the Adult if an Adult passes through filters

**School Year Filter**

Enable School Year Filter    1    To    12

**Complex Filtering**

Standard Search (fastest)

Complex Search (slowest)

**Alphabetical Filter**

A    To    Z

Help    ?    Reset    ↶    Close    ↷

### 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.

Enable Gender Filter

Unknown     Male     Female

### 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.

Enable Marital Status

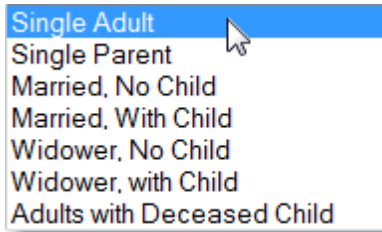
Single Adult    Adult Age 18

Adult Age based on today's date being  
Sunday . 21 October 2012

### 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.

### Family Position Load

This filter option is 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...**

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.

Read each option as these are described on the window as they will behave.

### 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.

### 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.

**Data Filters...**

<p><b>Find all people with information in the following fields</b></p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 300px;"> <input type="checkbox"/> Gender  <input type="checkbox"/> Occupation  <input type="checkbox"/> Title  <input type="checkbox"/> Preferred Given Name  <input type="checkbox"/> Middle name  <input type="checkbox"/> Other Surname  <input type="checkbox"/> Birth Date  <input type="checkbox"/> School Year  <input type="checkbox"/> Personal Mobile  <input type="checkbox"/> Personal Email  <input type="checkbox"/> Business Phone  <input type="checkbox"/> Business Fax  <input type="checkbox"/> Business Email  <input type="checkbox"/> Financial P.I.N.  <input type="checkbox"/> Family Phone  <input type="checkbox"/> Family Mobile  <input type="checkbox"/> Family Email  <input type="checkbox"/> Family Fax  <input type="checkbox"/> Residential Address  <input type="checkbox"/> Postal Address  <input type="checkbox"/> Status  <input type="checkbox"/> Groups  <input type="checkbox"/> Active Ministry         </div>	<p><b>Find all people with No information in the following fields</b></p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 300px;"> <input type="checkbox"/> Gender  <input type="checkbox"/> Occupation  <input type="checkbox"/> Title  <input type="checkbox"/> Preferred Given Name  <input type="checkbox"/> Middle name  <input type="checkbox"/> Other Surname  <input type="checkbox"/> Birth Date  <input type="checkbox"/> School Year  <input type="checkbox"/> Personal Mobile  <input type="checkbox"/> Personal Email  <input type="checkbox"/> Business Phone  <input type="checkbox"/> Business Fax  <input type="checkbox"/> Business Email  <input type="checkbox"/> Financial P.I.N.  <input type="checkbox"/> Family Phone  <input type="checkbox"/> Family Mobile  <input type="checkbox"/> Family Email  <input type="checkbox"/> Family Fax  <input type="checkbox"/> Residential Address  <input type="checkbox"/> Postal Address  <input type="checkbox"/> Status  <input type="checkbox"/> Groups  <input type="checkbox"/> Active Ministry         </div>
--	---

Reset 
Help 
Close

## Tagging

Use the tagging filter to simple find all people you have tagged (ticked) or to find all people that have not been ticked!

**Filters Tagging**

Include tagged people only  
 Exclude tagged people

Active Families ▼

**Available People**

Allwright Stephen  
 Allwright Marion  
 Angel Peter  
 Angel Belinda  
 Angel Helen  
 Anglin Brent  
 Anglin Katey  
 Anglin Mathew  
 Anglin Levi  
 Anglin Kerry  
 Barton Ray  
 Barton Ethel  
 Barton Ernie  
 Barton Karren  
 Blackeby Dot  
 Blackeby Helen  
 Blackeby Heather  
 Blackeby Frank  
 Brown Peter  
 Brown Heather

Tag Individual     Tag Family

Tag All

Untag All

Close

## 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   
  Add Preferred Name to Given Name

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

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

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    Date Filter

8/11/2015 

To

8/11/2015 

If Date does NOT exist

Ignore Date Filter

### 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.

Family Format     Individual Format

Family Format	Individual Format
<input type="checkbox"/> Add Individual Surname to Given Name <input type="checkbox"/> Show Hidden Individual Surname	<input checked="" type="radio"/> Use Family Surname <input type="radio"/> Use Individual Surname (if it exists) <input type="checkbox"/> Show Hidden Individual Surname

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		
<b>Allwright</b>	Stephen & Marion 11 Blackdog Road Riddels Creek 3412 VIC	054-33-5478
<b>Angel</b>	Peter & Belinda Helen 12 Water Way Crt Gisborne 3444 VIC Map: 11 Ref: A6	054-22-1199 peter@spirit.com.au
<b>Anglin</b>	Brent & Katey Mathew, Levi, Kerryn 10 Marsh Road Keilor Heights 3191 VIC Map: 15 Ref: A4	03-273214 Brentl@spirit.com.au 041234567890
<b>Baker</b>	Joshua & Ruth 34 Heidelberg Rd Ivanhoe 3333	
<b>Barton</b>	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 Riddells Creek 3412 VIC	054-33-5478
Allwright	Stephen 11 Blackdog Road Riddells Creek 3412 VIC	054-33-5478
Angel	Belinda 12 Water Way Crt Gisborne 3444 VIC Map: 11 Ref: A6	054-22-1199 peter@spirit.com.au
Angel	Helen 12 Water Way Crt Gisborne 3444 VIC Map: 11 Ref: A6	054-22-1199 peter@spirit.com.au
Angel	Peter 12 Water Way Crt 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: A4	03-273214 Brentl@spirit.com.au 04123456789

### Enable Sort

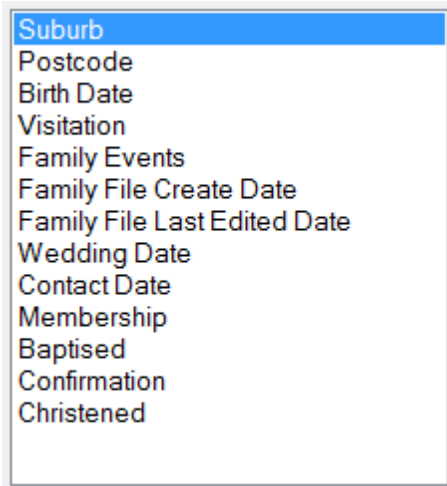
Enable Sort

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

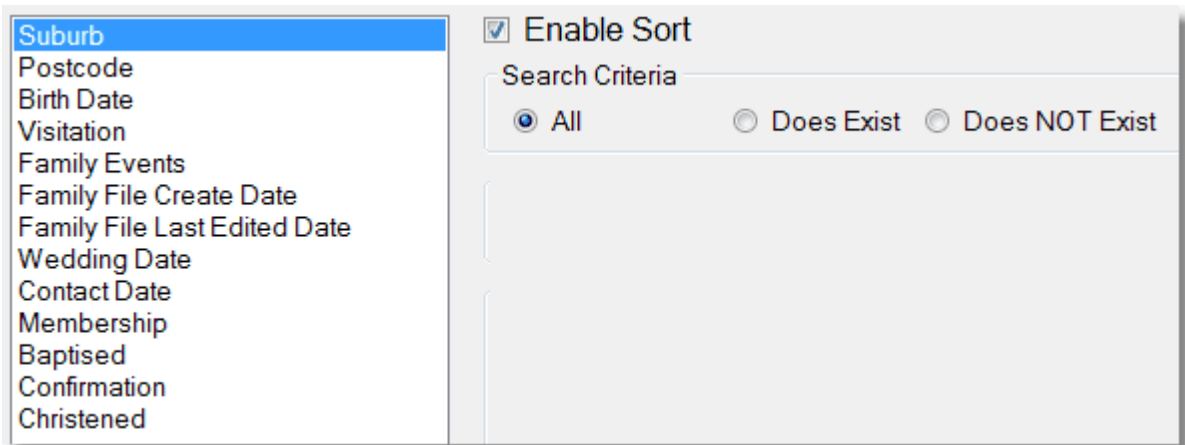
Click on each of the Sort On items in the list below to learn more about sorting and filtering on the dates and location information available in Sort.



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

- |                       |   |
|-----------------------|---|
| <b>ALL</b>            | 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. |
| <b>DOES EXIST</b>     | 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.                 |
| <b>DOES NOT EXIST</b> | No Sorting, however people will be passed through to the report if they do not have a suburb in their family file.  |



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

<b>ALL</b>	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.
<b>DOES EXIST</b>	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.
<b>DOES NOT EXIST</b>	No Sorting, however people will be passed through to the report if they do not have a Post Code in their family file.

The screenshot shows a software interface with a list of search criteria on the left and sorting options on the right. The list on the left includes: Suburb, Postcode (highlighted), Birth Date, Visitation, Family Events, Family File Create Date, Family File Last Edited Date, Wedding Date, Contact Date, Membership, Baptised, Confirmation, and Christened. On the right, there is a checkbox labeled 'Enable Sort' which is checked. Below it, there is a section titled 'Search Criteria' with three radio button options: 'All' (selected), 'Does Exist', and 'Does NOT Exist'.

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.

The screenshot displays a software interface for creating reports. On the left, a vertical list of fields is shown, with 'Birth Date' highlighted in blue. The fields include: Suburb, Postcode, Birth Date, Visitation, Family Events, Family File Create Date, Family File Last Edited Date, Wedding Date, Contact Date, Membership, Baptised, Confirmation, and Christened. On the right, a configuration panel titled 'Enable Sort' is visible. It contains three 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 set to 'January'), 'Age' (with input boxes for '1' and '18' and the text 'Years'), 'Date' (with a date input box set to '23/10/2012'), 'Anniversary Date' (with a 'To' label and another date input box set to '23/10/2012'), and 'If Date does NOT exist'.

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.

The screenshot displays a web interface for creating reports. On the left, a vertical list of fields is shown, with 'Visitation' highlighted in blue. The fields include: Suburb, Postcode, Birth Date, Visitation, Family Events, Family File Create Date, Family File Last Edited Date, Wedding Date, Contact Date, Membership, Baptised, Confirmation, and Christened. On the right, there are several sections for configuring the report:

- Enable Sort:** A checked checkbox.
- Search Criteria:** Radio buttons for 'All' (selected), 'Does Exist', and 'Does NOT Exist'.
- Order Date by:** Radio buttons for 'By Surname' (selected), 'By Month', and 'By Date'.
- Date Search Criteria:**
  - All Dates:** Selected radio button.
  - Month:** Radio button with a dropdown menu showing 'January'.
  - Age:** Radio button with input fields for '1' and '18' and the text 'Years'.
  - Date:** Radio button with a date input field showing '23/10/2012' and a calendar icon.
  - Anniversary Date:** Radio button with a 'To' label and a date input field showing '23/10/2012' and a calendar icon.
  - If Date does NOT exist:** Radio button.

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

**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   
 Age  To  Years  
 Date   
 Anniversary Date To   
 If Date does NOT exist

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 displays a web interface for creating reports. On the left, a vertical list of fields is shown, with 'Family File Create Date' highlighted in blue. On the right, there are several sections for configuring the report:

- Enable Sort:** A checked checkbox.
- Search Criteria:** Radio buttons for 'All', 'Does Exist', and 'Does NOT Exist'. 'All' is selected.
- Order Date by:** Radio buttons for 'By Surname', 'By Month', and 'By Date'. 'By Surname' is selected.
- Date Search Criteria:** Radio buttons for 'All Dates', 'Month', 'Age', 'Date', 'Anniversary Date', and 'If Date does NOT exist'. 'All Dates' is selected.
- Month:** A dropdown menu currently showing 'January'.
- Age:** Input fields for '1' and '18' with the label 'Years'.
- Date:** Input fields for '23/10/2012' with a calendar icon.
- Anniversary Date:** Input fields for '23/10/2012' with a calendar icon and a 'To' label between the two date fields.

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.

<ul style="list-style-type: none"> <li>Suburb</li> <li>Postcode</li> <li>Birth Date</li> <li>Visitation</li> <li>Family Events</li> <li>Family File Create Date</li> <li style="background-color: #e0f0ff;">Family File Last Edited Date</li> <li>Wedding Date</li> <li>Contact Date</li> <li>Membership</li> <li>Baptised</li> <li>Confirmation</li> <li>Christened</li> </ul>	<input checked="" type="checkbox"/> <b>Enable Sort</b> <hr/> <b>Search Criteria</b> <input checked="" type="radio"/> All <input type="radio"/> Does Exist <input type="radio"/> Does NOT Exist <hr/> <b>Order Date by</b> <input checked="" type="radio"/> By Surname <input type="radio"/> By Month <input type="radio"/> By Date <hr/> <b>Date Search Criteria</b> <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 <hr/> <input type="radio"/> Date <input type="text" value="23/10/2012"/> To <input type="radio"/> Anniversary Date <input type="text" value="23/10/2012"/> <input type="radio"/> If Date does NOT exist
---	---

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.



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

**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    23/10/2012

Anniversary Date    To    23/10/2012

If Date does NOT exist

Order Date by

By Surname     By Month     By Date

Choose to Sort your report by Surname, or by Month or 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 below 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  

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  


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    To  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 1/1/2014 to 1/1/2014 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

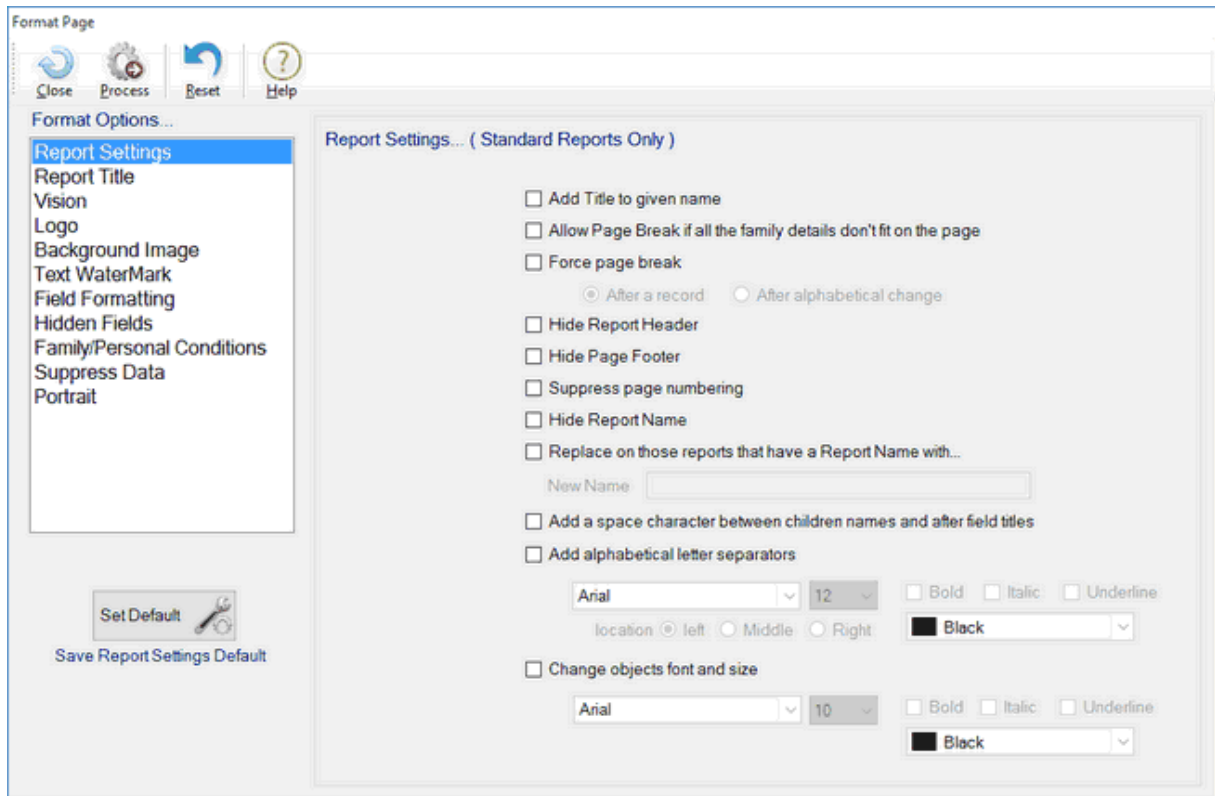
## Format



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.

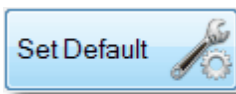


## Process



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

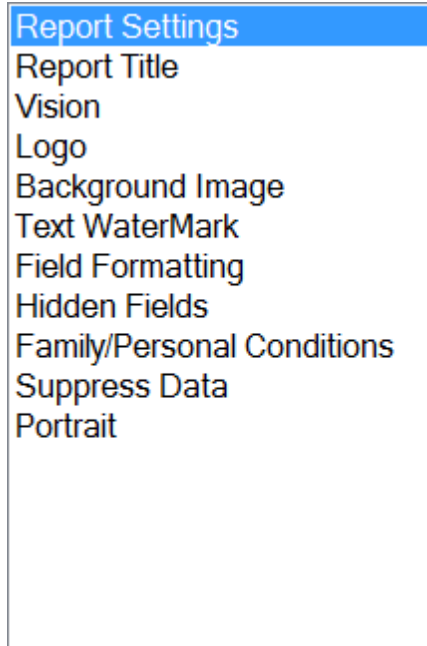


Reset the Formatting area to the default settings.

## 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 its 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

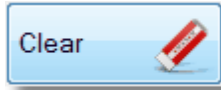
More Filters

Data Filters

Tag Filters



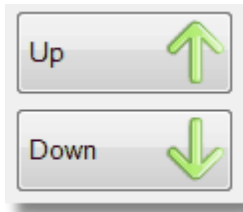
Enter a Report Title and press ADD to add it to the list of available titles to use.



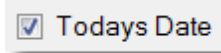
Clear the current title from being selected.



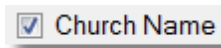
Delete the selected title from the list of available titles.



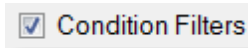
Use the arrow buttons to sort the list of Titles.



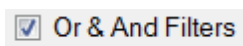
Tick this option to include the Date that the report was printed on in the report header.



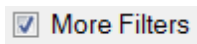
Tick this option to include your registered church name in the report header.



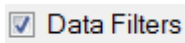
Include information on the selected Condition Filters in the report header. Information such as Active, Privacy, Archive etc



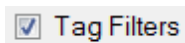
Include a summary of the [Filter Logic](#) used to produce the report.



Include a summary of the [More](#) filters used to produce the report.




Include a summary of the [Data](#) filters used to produce the report.



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

Current Title  
  
 Title Archive Add 

## 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.

Vision Text

Include Vision Statment in report header

Include Vision Statment in page footer

Bold     Italic     Underline

Alignment  Left     Middle     Right

Include thin line separator

Include thick line separator

Font

Colour


## 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.

Include Logo Image

Church

Add 

Delete 

Current Logo 

Logo size on report

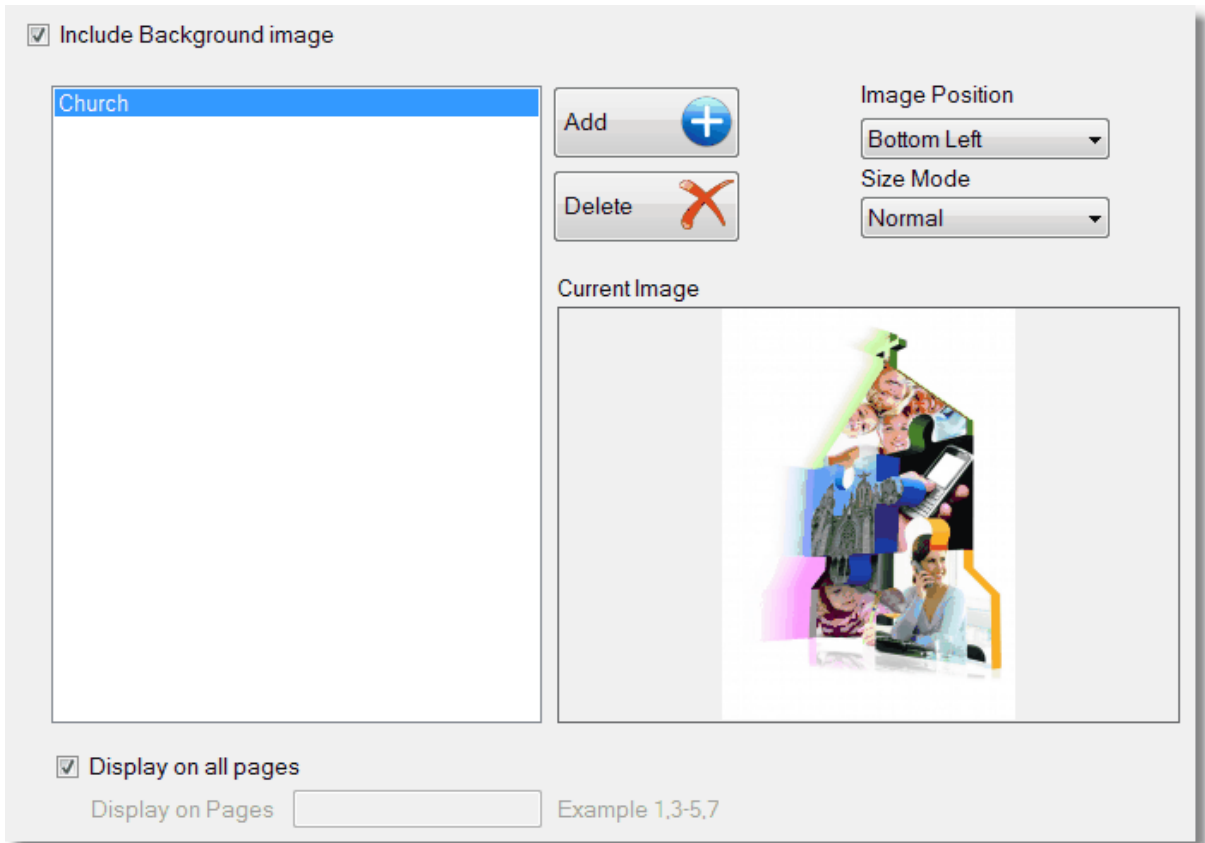
Auto     Small     Medium     Large



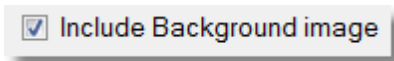
**Background Image**

Include an image as a background to your report. Click on each part of the window below to learn more.

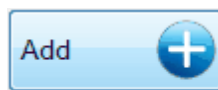
Note, if you want the image to be faint like a watermark, rather than solid color, you will need to edit your image in a photo editing program to create an image exactly as you want. There is no settings in this feature to turn a full color picture into a faint watermark.



Tick this option to display (print also) a background image on the selected report.



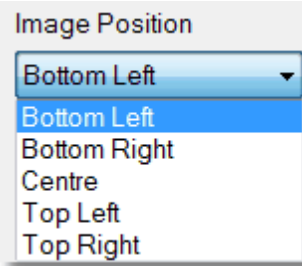
Use the Add feature to allow you to select and save a picture file for use in Pastoral Care.



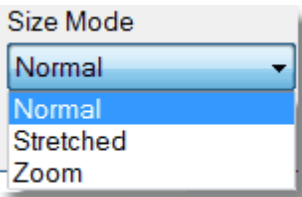
Delete an image from Pastoral Care.



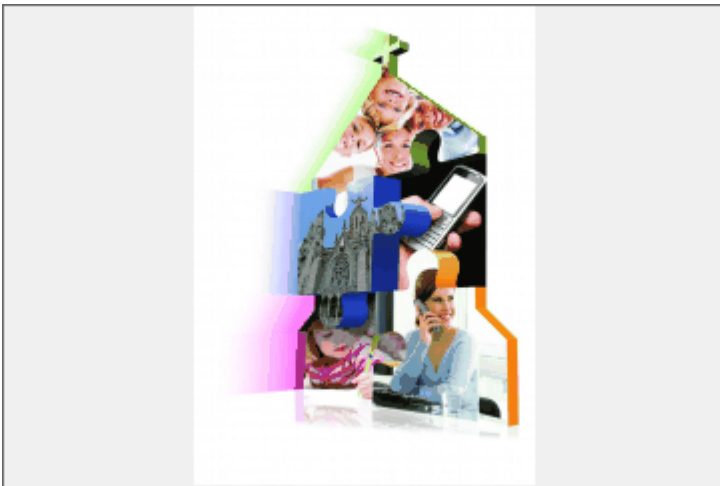
Choose the position that you want the picture included on the report page.



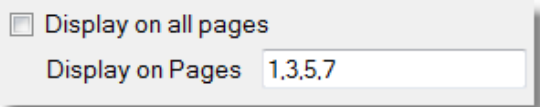
Select the picture sizing mode. For best results, select Normal.



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 is 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.

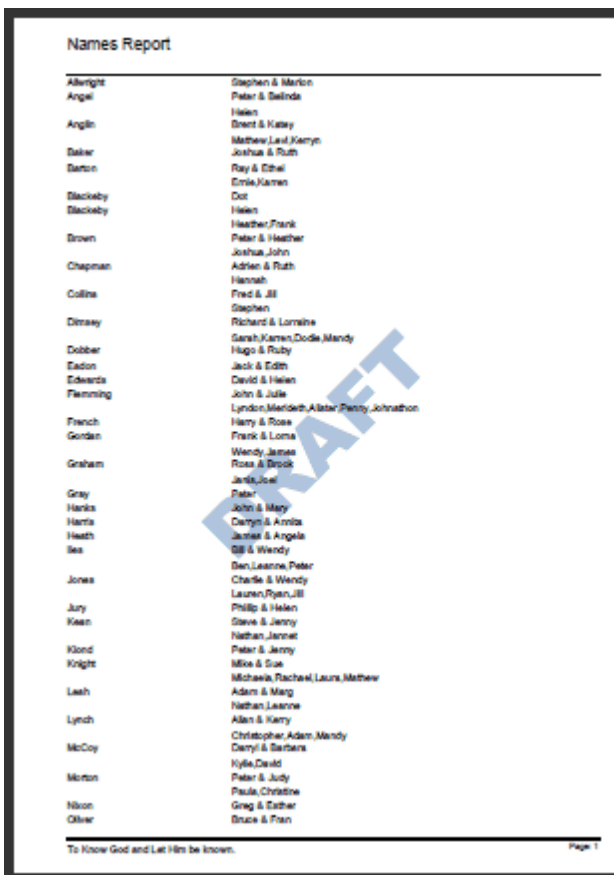
Include Text Watermark when printing reports

Font **Arial Black** 72

Colour  LightSteelBlue

Text DRAFT

Angle 45



### 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

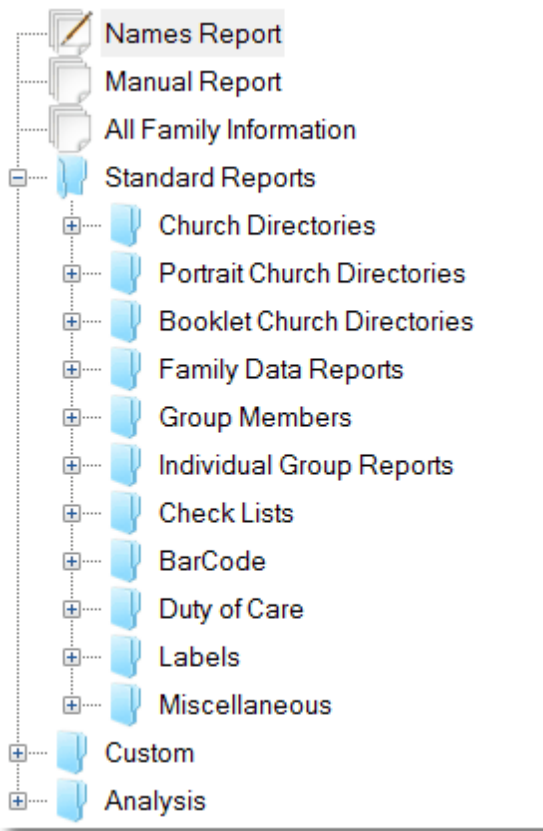
No Silhouette 

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 below 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)
	Heather (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><b>Individual Details</b></p> <p><input type="checkbox"/> Individual Condition</p> <p><input type="checkbox"/> Gender</p> <p><input type="checkbox"/> Preferred / Actual Name</p> <p><input type="checkbox"/> Title</p> <p><input type="checkbox"/> Birth Date</p> <p><input type="checkbox"/> Other Surname</p> <p><input type="checkbox"/> Middle Name</p> <p><input type="checkbox"/> Personal Email</p> <p><input type="checkbox"/> Personal Mobile</p> <p><input type="checkbox"/> Business Phone</p> <p><input type="checkbox"/> Business Email</p> <p><input type="checkbox"/> Business Fax</p> <p><b>Individual Dates</b></p> <p><input type="checkbox"/> Membership</p> <p><input type="checkbox"/> Baptised</p> <p><input type="checkbox"/> Confirmation</p> <p><input type="checkbox"/> Christened</p> <p><b>Flexi Fields</b></p> <p><input type="checkbox"/> Elder</p>	<p><input type="checkbox"/> School Year</p> <p><input type="checkbox"/> Occupation</p> <p><input type="checkbox"/> Status</p> <p><input type="checkbox"/> Individual Groups</p> <p><input type="checkbox"/> Ministry</p> <p><input type="checkbox"/> Medical</p> <p><input type="checkbox"/> Relationship</p> <p><input type="checkbox"/> SMS Lists</p> <p><input type="checkbox"/> Email Lists</p>
<p><b>Family Details</b></p> <p><input type="checkbox"/> Residential Address</p> <p><input type="checkbox"/> Postal Address</p> <p><input type="checkbox"/> Phone</p> <p><input type="checkbox"/> Family Mobile</p> <p><input type="checkbox"/> Family Fax</p> <p><input type="checkbox"/> Family Email</p> <p><input type="checkbox"/> Other Contacts</p> <p><input type="checkbox"/> Family Group</p> <p><input type="checkbox"/> Family Events</p> <p><input type="checkbox"/> Visitation Completed</p> <p style="margin-left: 20px;"><input type="checkbox"/> Include Pre Visitation Notes</p> <p style="margin-left: 20px;"><input type="checkbox"/> Include Post Visitation Notes</p> <p><b>Family Dates</b></p> <p><input type="checkbox"/> Wedding Date</p> <p><input type="checkbox"/> Contact Date</p>	<p><input type="checkbox"/> Family Condition</p> <p><input type="checkbox"/> Family File Created &amp; Last Edit Date</p> <p><input type="checkbox"/> Family File Memo</p> <p><input type="checkbox"/> Family General Notes from NoteBook</p> <p><input type="checkbox"/> Family Visitation Notes from NoteBook</p> <p><input type="checkbox"/> Personal Notes from NoteBook</p> <p><input type="checkbox"/> Include Portraits</p>

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

<p><input checked="" type="checkbox"/> Individual Condition</p> <p><input checked="" type="checkbox"/> Gender</p> <p><input checked="" type="checkbox"/> Preferred / Actual Name</p> <p><input checked="" type="checkbox"/> Title</p> <p><input checked="" type="checkbox"/> Birth Date</p> <p><input type="checkbox"/> Other Surname</p> <p><input type="checkbox"/> Middle Name</p> <p><input type="checkbox"/> Personal Email</p> <p><input type="checkbox"/> Personal Mobile</p> <p><input type="checkbox"/> Business Phone</p> <p><input type="checkbox"/> Business Email</p> <p><input type="checkbox"/> Business Fax</p>	<p><input type="checkbox"/> School Year</p> <p><input type="checkbox"/> Occupation</p> <p><input type="checkbox"/> Status</p> <p><input type="checkbox"/> Individual Groups</p> <p><input checked="" type="checkbox"/> Ministry</p> <p><input type="checkbox"/> Medical</p> <p><input type="checkbox"/> Relationship</p> <p><input type="checkbox"/> SMS Lists</p> <p><input type="checkbox"/> Email Lists</p>
---	--

Tick any of the following family fields to include on the report. Pastoral Care takes care of the layout of any options you tick.

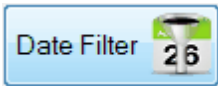
Don't forget, these reports can be enhanced also with [Filters](#), [Sort](#) and [Format Options](#) for more control

<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.

<b>Individual Dates</b>	
<input checked="" type="checkbox"/>	Membership
<input type="checkbox"/>	Baptised
<input type="checkbox"/>	Confirmation
<input type="checkbox"/>	Christened



If you select a date item, press the [Date Filter](#) button

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.

<b>Family Dates</b>	
<input type="checkbox"/>	Wedding Date
<input type="checkbox"/>	Contact Date



If you select a date item, press the [Date Filter](#) button

Tick any of the Flexi Fields to include on the report.  
Pastoral Care takes care of the layout of any options you tick.

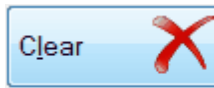
Don't forget, these reports can be enhanced also with [Filters](#), [Sort](#) and [Format Options](#) for more control.

Clear all settings on the Manual Reports window.

**Flexi Fields**

Elder

Blood Group



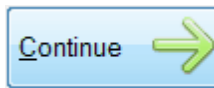
Select (tick) any enabled date filters and set a date range for locating (filtering) people in. Press Continue to return to the previous window.

**Date Filtering**

<input checked="" type="checkbox"/> <b>Activate Individual Date Filtering</b> <div style="margin-top: 5px;"> <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Tuesday . 29 December 2015</div> <span style="font-size: small;">▼</span>  <div style="text-align: center; margin: 2px 0;">To</div> <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Tuesday . 29 December 2015</div> <span style="font-size: small;">▼</span> </div>	<input checked="" type="checkbox"/> <b>Activate Family Date Filtering</b> <div style="margin-top: 5px;"> <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Tuesday . 29 December 2015</div> <span style="font-size: small;">▼</span>  <div style="text-align: center; margin: 2px 0;">To</div> <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Tuesday . 29 December 2015</div> <span style="font-size: small;">▼</span> </div>
<input checked="" type="checkbox"/> <b>Activate Family Event Date Filtering</b> <div style="margin-top: 5px;"> <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Tuesday . 29 December 2015</div> <span style="font-size: small;">▼</span>  <div style="text-align: center; margin: 2px 0;">To</div> <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Tuesday . 29 December 2015</div> <span style="font-size: small;">▼</span> </div> <p style="font-size: small; margin-top: 5px;">Family Event date order</p> <p><input checked="" type="radio"/> As entered   <input type="radio"/> Ascending   <input type="radio"/> Descending</p>	<input checked="" type="checkbox"/> <b>Activate Visitation Date Filtering</b> <div style="margin-top: 5px;"> <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Tuesday . 29 December 2015</div> <span style="font-size: small;">▼</span>  <div style="text-align: center; margin: 2px 0;">To</div> <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Tuesday . 29 December 2015</div> <span style="font-size: small;">▼</span> </div> <p style="font-size: small; margin-top: 5px;">Visitation dates ordered by...</p> <p><input checked="" type="radio"/> As entered   <input type="radio"/> Ascending   <input type="radio"/> Descending</p>

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		
<b>Allwright (Active)</b>	<b>Stephen (Active) &amp; Marion (Active)</b>	054-33-5478
	11 Blackdog Road Riddels Creek 3412 VIC	Family Condition = Active
	<b>Stephen</b> Individual Condition = Active Birth Date: 03/07/1945	
	<b>Marion</b> Individual Condition = Active Birth Date: 05/07/1946	
	<b>Date</b> <b>Requested By...</b>	<b>Assigned To...</b>
<b>Visitation:</b>	06/08/1993	Graham Lawson
<b>Angel (Active)</b>	<b>Peter (Active) &amp; Belinda (Active)</b>	054-22-1199
	Helen (Active) 12 Water Way Crt Gisborne 3444 VIC Map: 11 Ref: A6	peter@spirit.com.au Family Condition = Active
	<b>Peter</b> Individual Condition = Active Gender: Female Birth Date: 02/06/1965	

### 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="Sunday . 8 November 2015"/> </div> <div style="text-align: center; margin-left: 20px;">To</div> <div style="margin-left: 20px;"> <input type="text" value="Sunday . 8 November 2015"/> </div>	<input type="checkbox"/> Activate Family Date Filtering <div style="margin-left: 20px;"> <input type="text" value="Sunday . 8 November 2015"/> </div> <div style="text-align: center; margin-left: 20px;">To</div> <div style="margin-left: 20px;"> <input type="text" value="Sunday . 8 November 2015"/> </div>
---	---

---

<input type="checkbox"/> Activate Family Event Date Filtering <div style="margin-left: 20px;"> <input type="text" value="Sunday . 8 November 2015"/> </div> <div style="text-align: center; margin-left: 20px;">To</div> <div style="margin-left: 20px;"> <input type="text" value="Sunday . 8 November 2015"/> </div>	<input type="checkbox"/> Activate Visitation Date Filtering <div style="margin-left: 20px;"> <input type="text" value="Sunday . 8 November 2015"/> </div> <div style="text-align: center; margin-left: 20px;">To</div> <div style="margin-left: 20px;"> <input type="text" value="Sunday . 8 November 2015"/> </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

<b>Allwright (Active)</b>	<b>Stephen (Active) &amp; Marion (Active)</b>		054-33-5478
	11 Blackdog Road Riddels Creek 3412 VIC		Family Condition = Active File Last Edit: 29/11/2008
<b>Stephen</b>	Individual Condition: Active Title: Mr. Birth Date: 03/07/1945 Email: stephen@spirit.com.au Mobile Phone: 041234567890 Business Phone: 018-998725		
<b>Marion</b>	Individual Condition: Active Title: Mrs. Birth Date: 05/07/1946 Mobile Phone: 041234567890 Business Phone: 054-229876 Business Email: business email		
<b>Occupation:</b>	Stephen	Plumber	
	Marion	Doctor	
<b>Status:</b>	Stephen	Deacon, Committed Attender	
	Marion	Committed Attender	
<b>Individual Group:</b>	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	
<b>Individual Date:</b>	Stephen	<b>Date Description</b>	<b>Date Tag</b>
		Membership	01/01/1989 X
		Baptised	05/05/1992 X
		Confirmation	03/03/1991
		Christened	03/03/1994
	Marion	Membership	01/01/1989 X
		Baptised	05/05/1992 X
		<b>Flexi Name</b>	<b>Description Tag</b>
<b>Flexi Field:</b>	Stephen	Elder	David Wilson
<b>SMS List:</b>	Stephen	Leadership List	
	Marion	All Church List, Leadership List	
<b>Email List:</b>	Stephen	All Church List	
	Marion	All Church List, Leadership List	
<b>Family Contacts:</b>	Holiday House		58 456 8792
<b>Family Group:</b>	Main Church, Home Group 1		
<b>Family Events:</b>	20/03/1995	Marions Mum died	
	<b>Date</b>	<b>Tag</b>	<b>Date Description</b>
<b>Family Date:</b>	04/07/1969		Wedding Date
	03/01/1973		Contact Date
	<b>Date</b>	<b>Requested By...</b>	<b>Assigned To...</b>
<b>Visitation:</b>	06/08/1993		Graham Lawson
	(Post Visit Note - Marion 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.

**Address Options**

Include in the Address Field...

Include Residential Address  
(If Residential is blank Postal will be included)

Include Postal Address

Cancel 
Continue

**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		
<b>Allwright (Active)</b>	Stephen (Active) & Marion (Active) 11 Blackdog Road Riddells Creek 3412 VIC	054-33-5478
<b>Angel (Active)</b>	Peter (Active) & Belinda (Active) Helen (Active) 12 Water Way Crt Gisborne 3444 VIC Map: 11 Ref: A6	054-22-1199 peter@spirit.com.au
<b>Anglin (Active)</b>	Brent (Active) & Katey (Active) Mathew (Active), Levi (Active), Kerry (Active) 10 Marsh Road Keilor Heights 3191 VIC Map: 15 Ref: A4	03-273214 Brentl@spirit.com.au 041234567890
<b>Baker (Active)</b>	Joshua (Active) & Ruth (Active) 34 Heidelberg Rd Ivanhoe 3333	
<b>Barton (Active)</b>	Ray (Active) & Ethel (Active)	03-744-1228

### 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.

Address Options

Include in the Address Field...

Include Residential Address  
(If Residential is blank Postal will be included)

Include Postal Address

Cancel  Continue 

### 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.

**Address Options**

Include in the Address Field...

Include Residential Address  
(If Residential is blank Postal will be included)

Include Postal Address

Cancel 
Continue 

### Sample Report

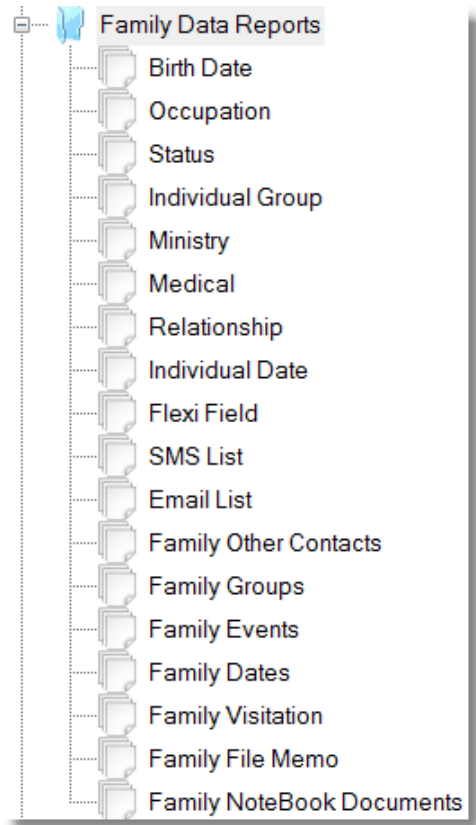
Shown below is a sample Church Booklet Directory. Notice that the print is larger than normal, this is so when the report is automatically shrunk to fit into A5 format that the report is still readable.

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.

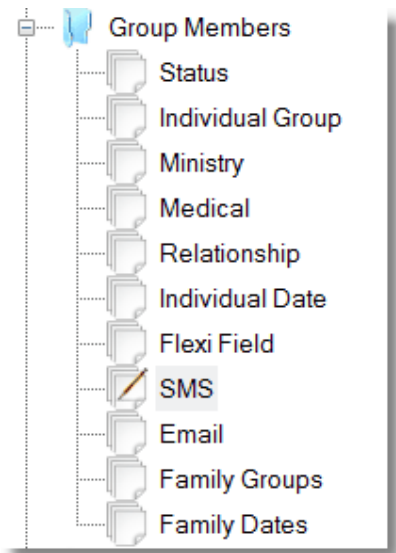
There are only a few Pre-Flight options some of these reports that involve mainly Date Filters, and these are self explanatory. Combine also with [Filters](#), [Sort](#) and [Format Options](#) for more control.



**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.

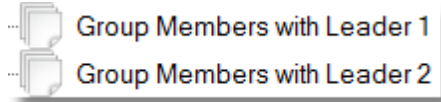
There are no Pre-Flight options for these reports. Combine also with [Filters](#), [Sort](#) and [Format Options](#) for more control.



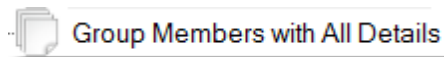
## Individual Group Reports

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.

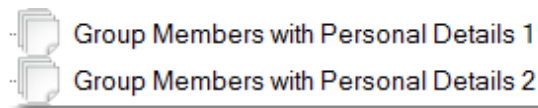
See a description of each report below.



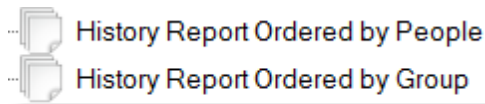
Two different reports showing Group Members of every Individual group along with the group leaders name.



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.

**Labels Position**

Label to Run... Place 'State' field on its own line

Test ▼

Start the report from label position number

To assist using label sheets that have been partially used you can start the label report from any label position.

On multi column sheets the labels are created down the first column before starting at the top of the next column.

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
	Helen		
Anglin	Brent & Katey		29/11/2009
	Mathew, Levi, Kerry		
Baker	Joshua & Ruth	04/08/2012	02/09/2012
Barton	Ray & Ethel		27/07/2012
	Ernie, Karren		
Blackeby	Dot		29/11/2009
Blackeby	Helen		27/07/2012
	Heather, Frank		
Brown	Peter & Heather		29/11/2009
	Joshua, John		

## 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	Preferred 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

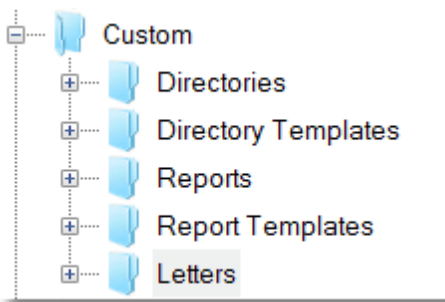
		School Year
Angel	Helen	5
Anglin	Mathew	6
Anglin	Levi	7
Anglin	Kerryn	9
Barton	Ernie	3
Barton	Karren	4
Blackeby	Heather	5
Blackeby	Frank	3
Brown	Joshua	9
Brown	John	11
Collins	Stephen	12
Dimsey	Dodie	3

### 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

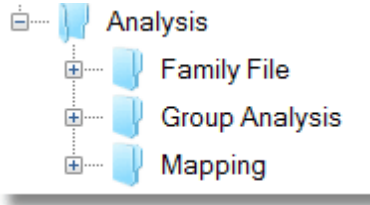
The Analysis area in Pastoral Care replaces the previous version feature called Data Analysis. Having moved Data Analysis out of it's own area, and now including it in Create Reports has added additional power that we did not have before. You can now run Analysis reports on the whole church from here, 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.





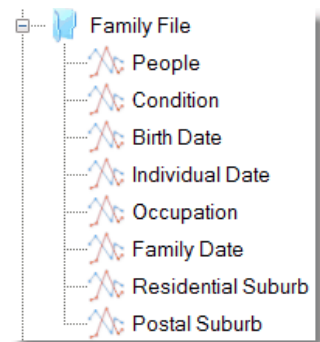
Click on each Analysis reporting area below to learn more.



## 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:  
Sunday . 8 November 2015

Enable Graph

Graph type  
Bar 2D



Single colour  
Blue

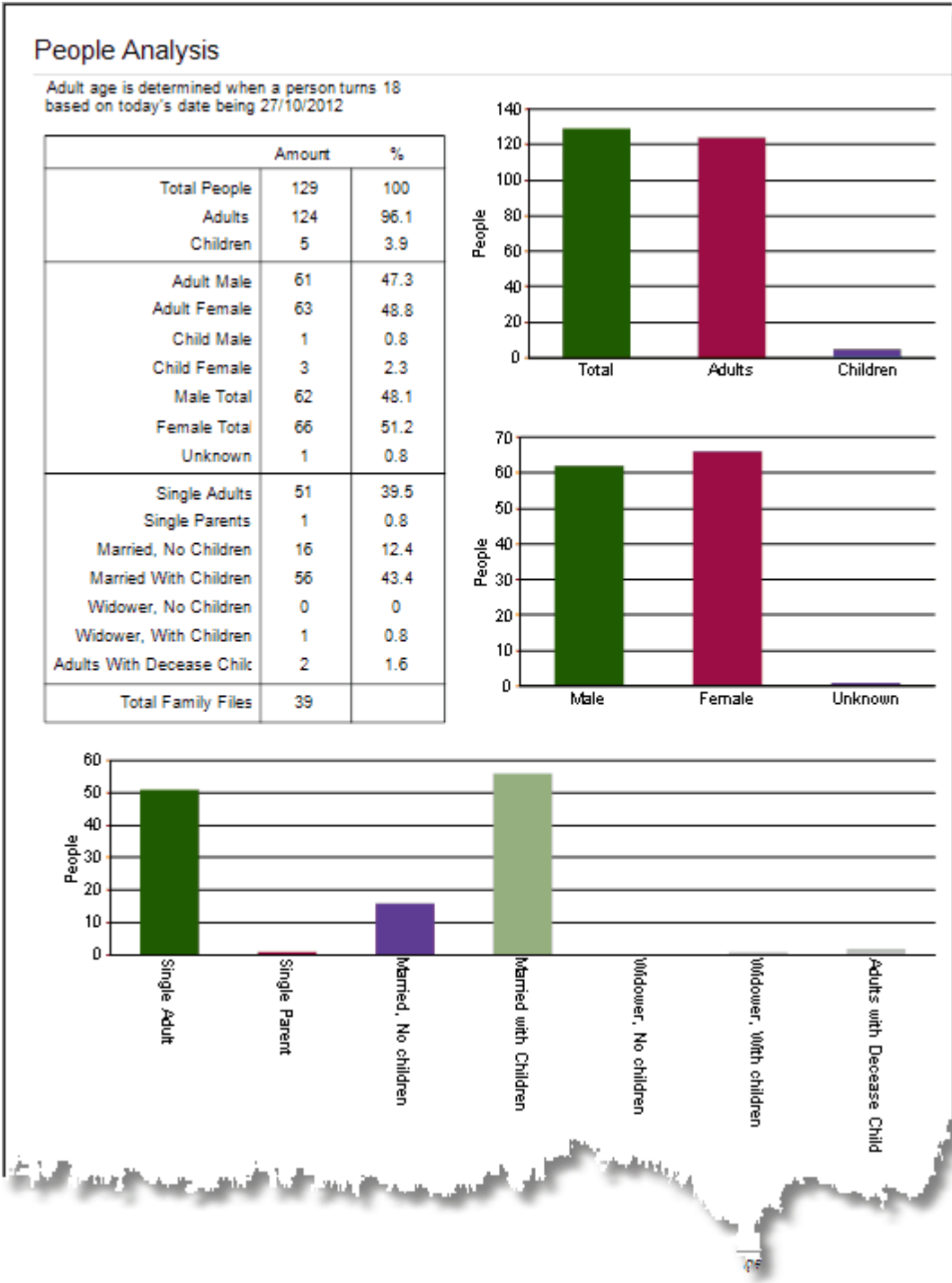
Ignore Zero Values

Enabled chart backwall

Colour theme  
Single Colour

Backwall colour  
White

Cancel  Continue 



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.

Individual Condition...

Include the Following Individual Conditions

<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Privacy	<input checked="" type="checkbox"/> Prospect
<input checked="" type="checkbox"/> Archived	<input checked="" type="checkbox"/> Contacts	<input checked="" type="checkbox"/> Deceased

Filter on chosen conditions (Optional)

- Privacy Request
- Active People
- Prospect People
- Deceased
- Contacts
- Archived People

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.

Report Options

Enable Graph

Graph type  
Bar 2D



Single colour  
Blue

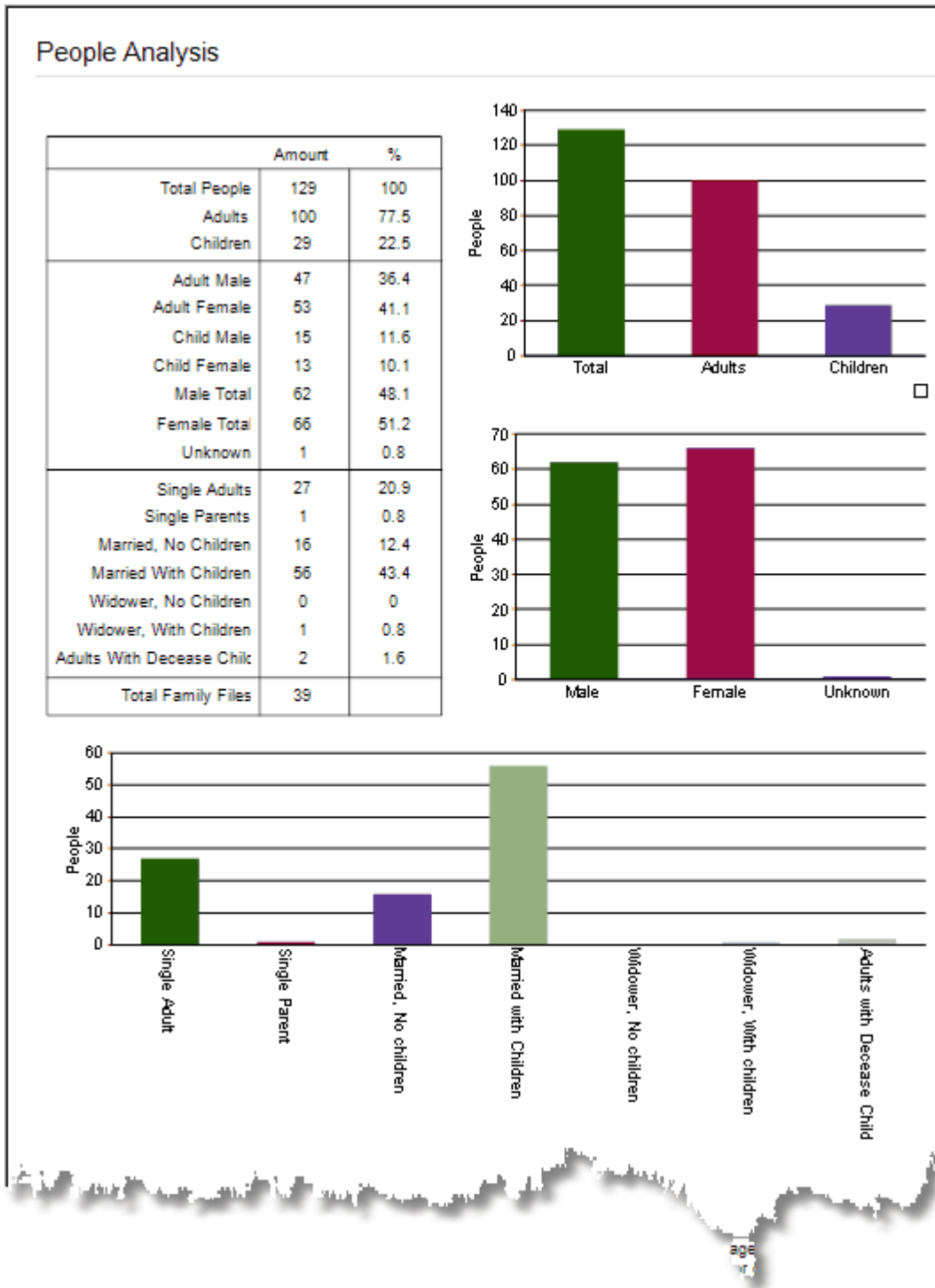
Ignore Zero Values

Enabled chart backwall

Colour theme  
Single Colour

Backwall colour  
White

Cancel  Continue 



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

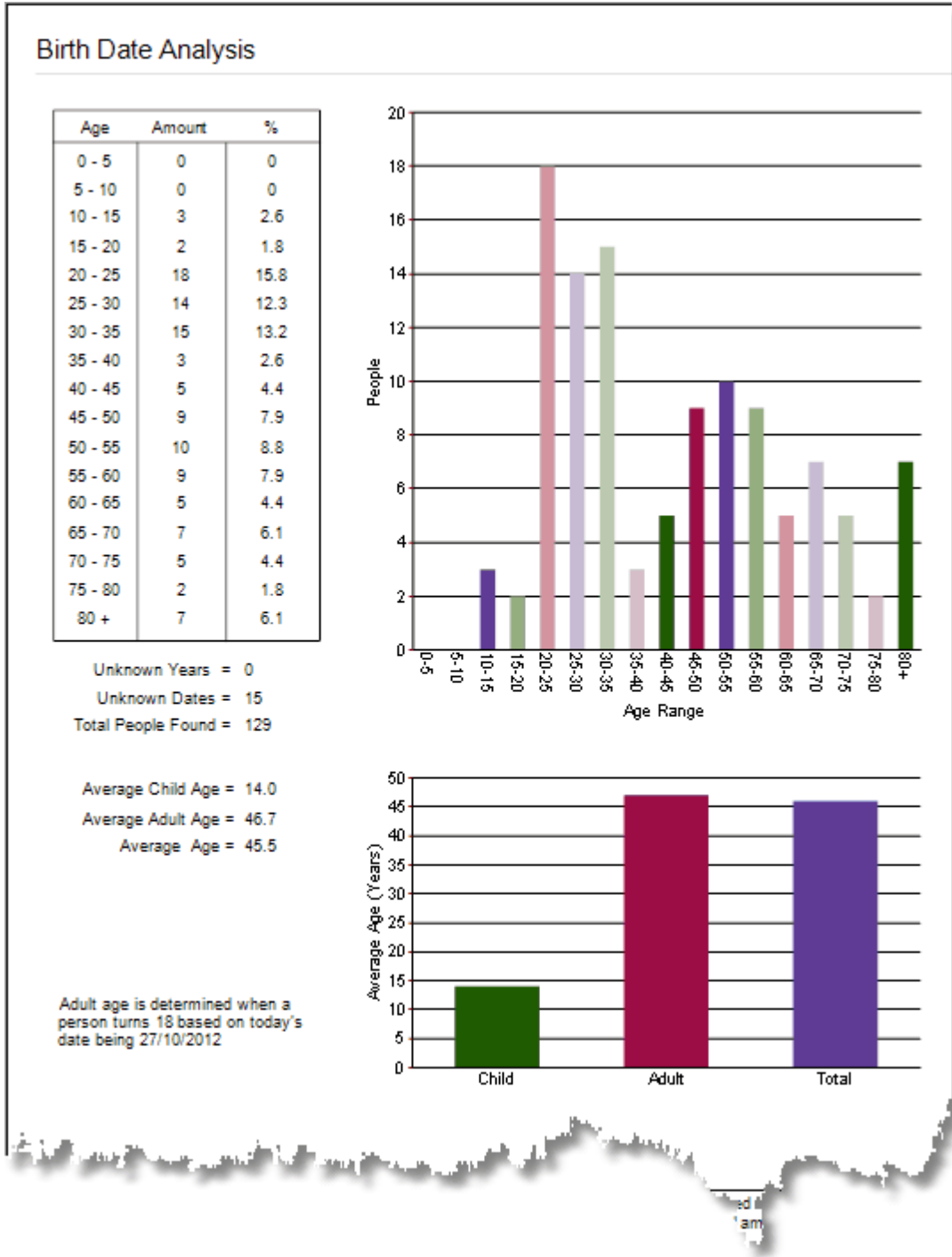
### Colour Theme

Set a colour them to make your graphs look really cool! Simple to use and already have a great selection of complimentary colours.

The screenshot shows a dialog box titled "Report Options" with the following settings:

- Adult age begins at...: 18
- Age Calculated based on today's date being: Sunday, 8 November 2015
- Enable Graph
- Graph type: Bar 2D
- Single colour: Blue
- Ignore Zero Values
- Enabled chart backwall
- Colour theme: Single Colour
- Backwall colour: White

At the bottom, there are "Cancel" and "Continue" buttons with arrows.



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.

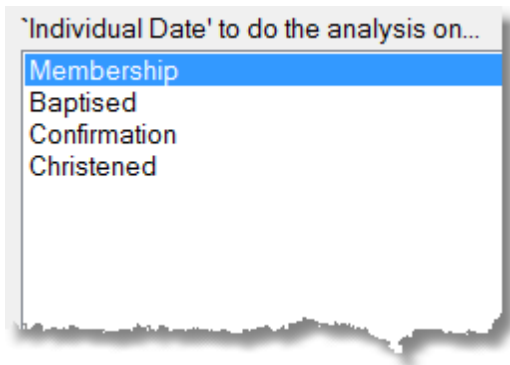
In addition to using this report on the whole church, you can now use filters to find out more about selected groups of people. All the power of [Filters](#) and [Format](#) controls can be used in these reports Even though an Individual Date report is essentially already filtered for an individual date, 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 below.

## 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.

Individual Date Options

Individual Date to do the analysis on...

- Membership
- Baptised
- Confirmation
- Christened

Enable Graph

Graph type  
Bar 2D

Ignore Zero Values



Colour theme  
Single Colour

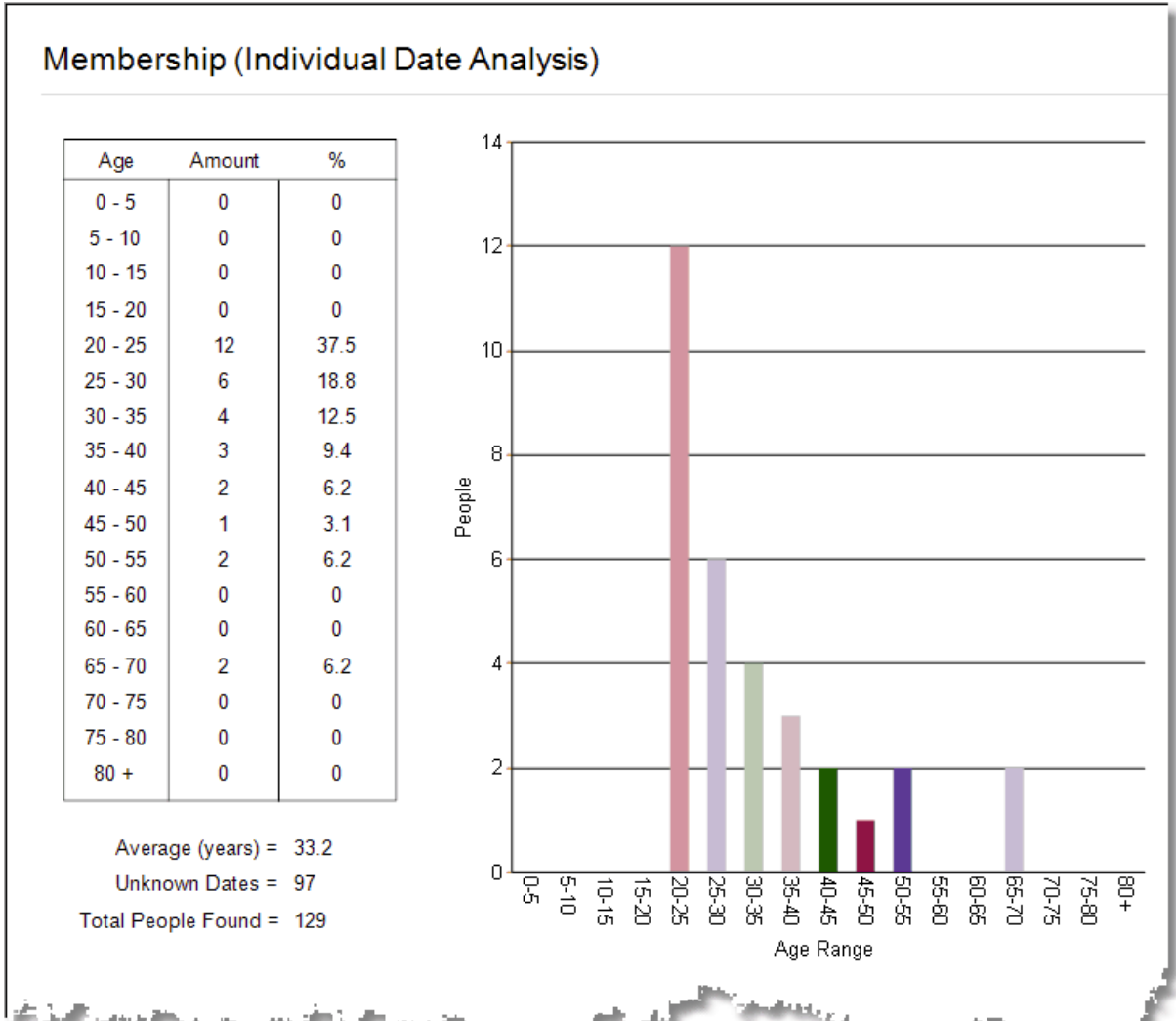
Single colour  
Blue

Backwall colour  
White

Enabled chart backwall

Analysis based on the date...  
Sunday . 8 November 2015

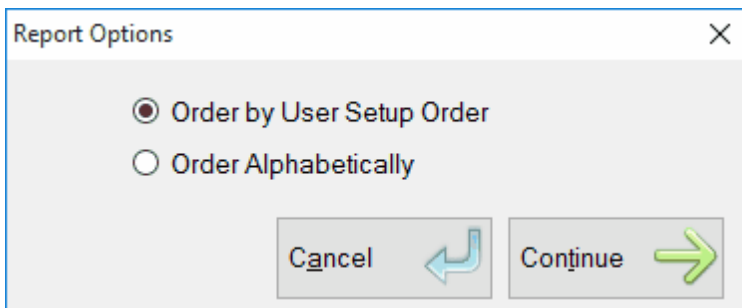
Cancel  Continue 



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	

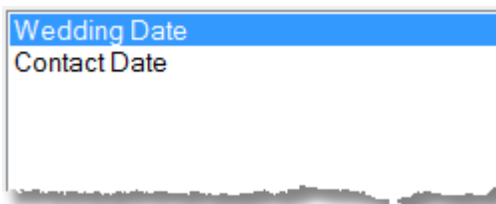
The Family Date report gives you great demographics on the "age" spread of people in a Family Date grouping. For Example, if Contact Date is selected, then the report will show how "OLD" your First Contacts are in Percentages and numbers of people.

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 Family Date Analysis report are shown below.

### 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.

Family Date Options

Family Date to do the analysis on...

- Wedding Date
- Contact Date

Enable Graph

Graph type  
Bar 2D

Ignore Zero Values

Colour theme  
Single Colour

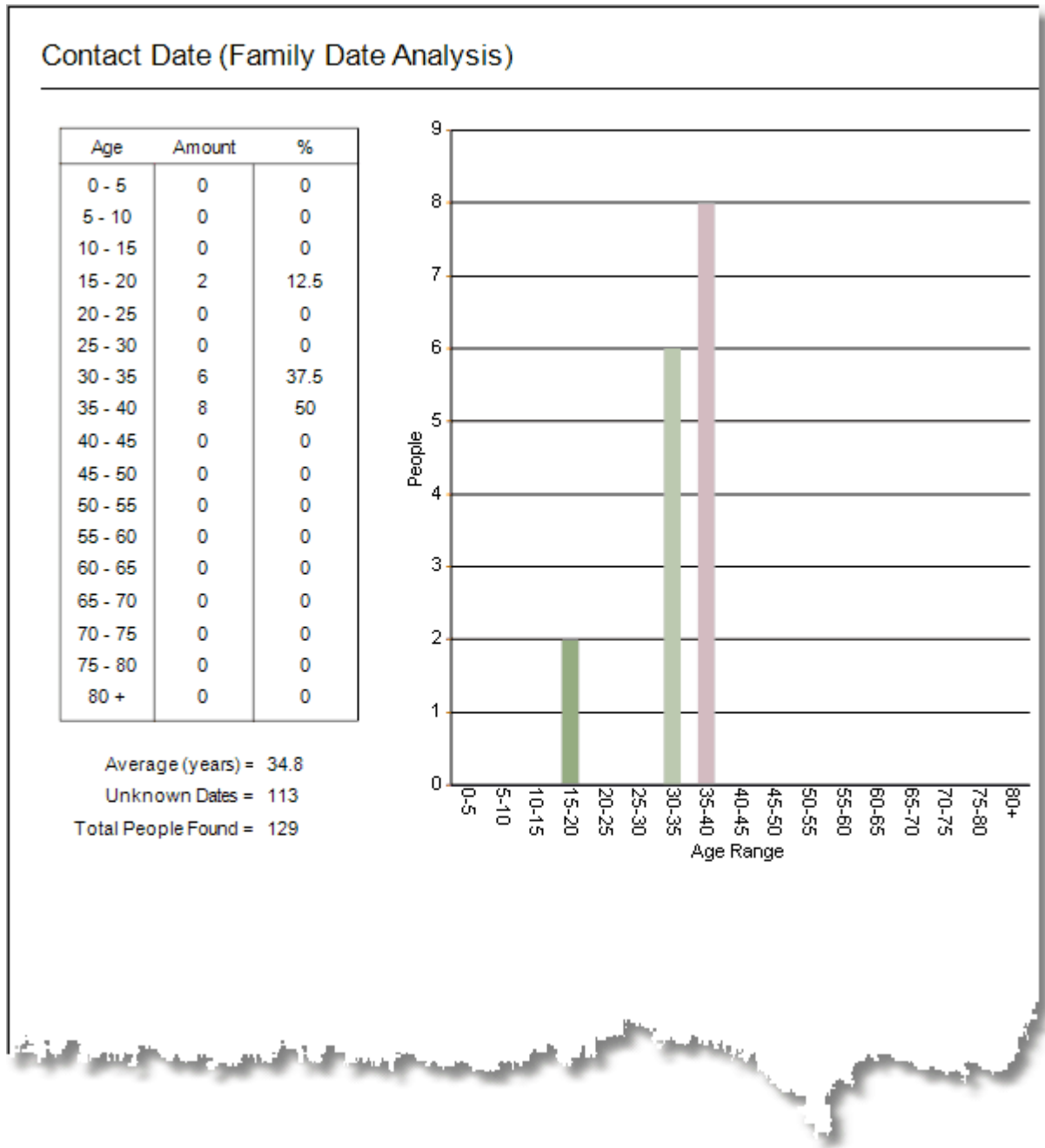
Single colour  
Blue

Backwall colour  
White

Enabled chart backwall

Analysis based on the date...  
Tuesday ,29 December 2015

Cancel Continue



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.

### Residential Suburb Analysis

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..

Report Options ×

Order by User Setup Order

Order Alphabetically

Cancel 
Continue



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 Maintenance	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
Mens Fellowship	10	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.

**Mapping Analysis Options**

In determining the amount of adults the adult age begins at...

Adult Age

Age Calculated based on today's date being:

**Map Density 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.

**Mapping Analysis Options**

Reference Starting point..

Landmark

Map

Ref

Increment  Km

In determining the amount of adults the adult age begins at..

Adult Age

Age Calculated based on today's date being:

### 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



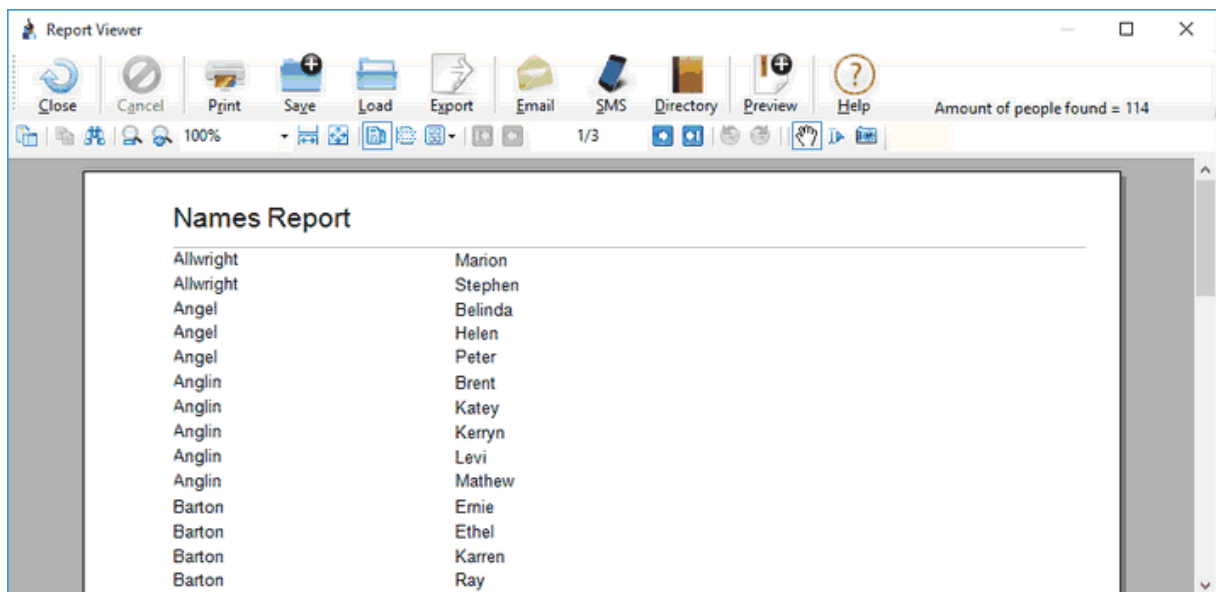
Simply press the Load Button on the [Report Viewer Toolbar](#) and select the report to view.

## 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.

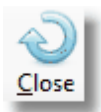


### Toolbar

Shown below is the toolbar controls on the Report Viewer. Click on each item for more information.



### Close



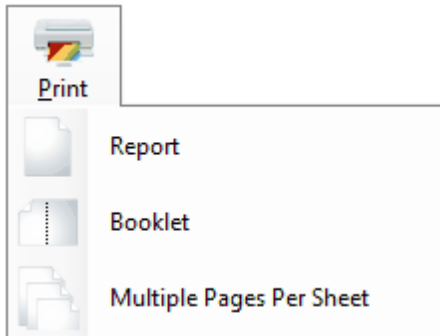
Close the Report Viewer and return to the previous window.

## 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.

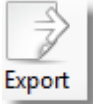
On the Explore Tab on the main menu, you can select the View Saved Reports option for viewing reports that you have saved.

## 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 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 word 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!

Report Email Options

Send Email to the People on the Report  
 Send Email to a selected group  
 Send Email to a selected Individual

Load Email addresses as...  Family Format  Individual Format

Group Type	Category	Current Members	Total = 0
Status	Deacon		
Individual Group	Elder		
Active Ministry	Committed Attender		
Potential Ministry	Occasional Attender		
Medical			
Relationship			
Occupation			
Individual Dates			
Flexi Fields			
SMS List			
Email List			
Family Group			
Family Dates			

Attach report to email  
 Report Title...

## 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!

Report SMS Options

When loading in the SMS phone numbers load them in as...

Family Format  
 Individual Format

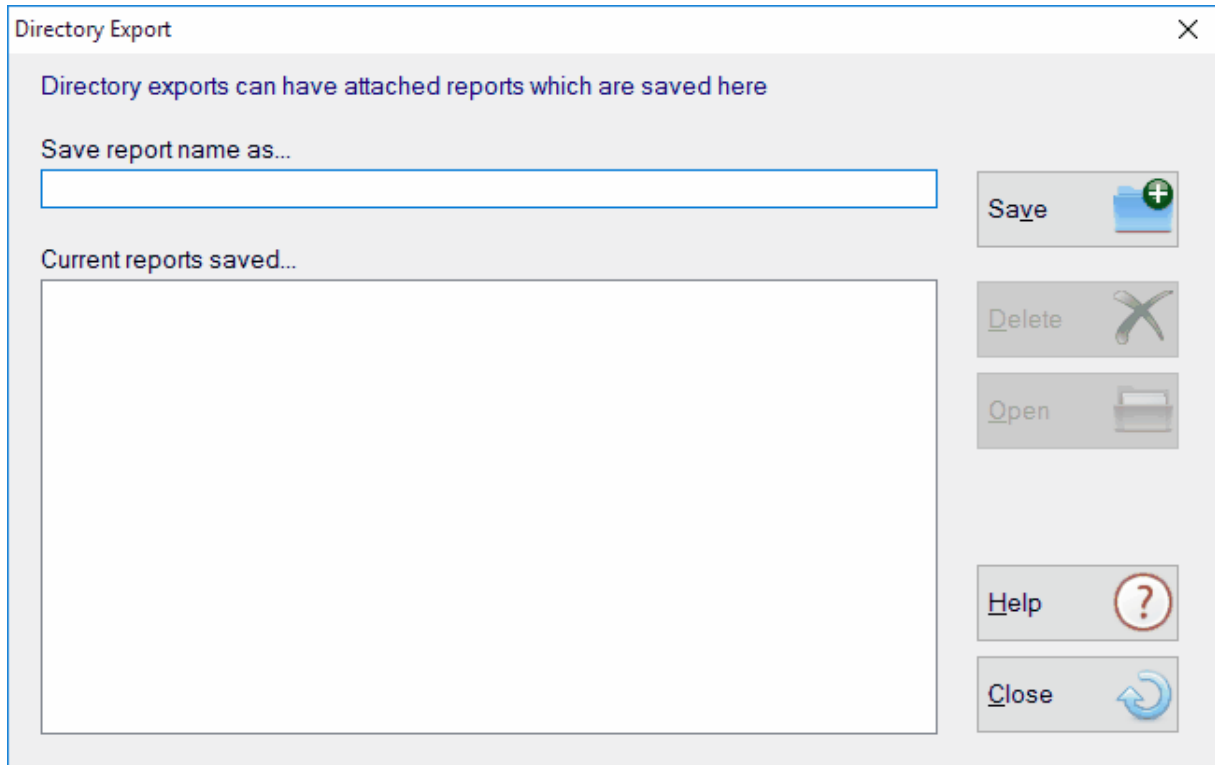


## Directory



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

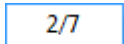
The Navigation Toolbar allows you to jump around the various pages of the currently displayed report.



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



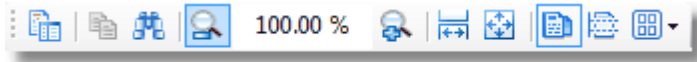
Go backwards



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

100.00 %

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](http://www.smsglobal.com.au)

At the time of publication, SMS Global's account details and pricing was:

- Messages are 10 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:

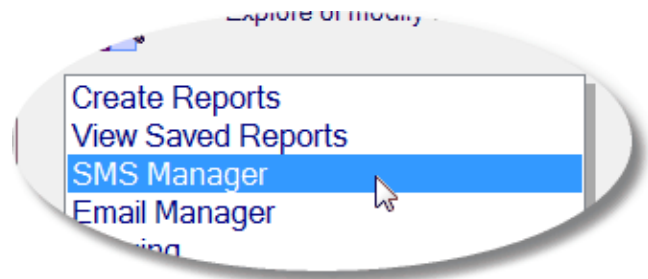
- Australian Provider
- Excellent technical support and service
- Fast Gateway (Average of 3.1 seconds to send a text)
- Great Features – SMS to Voice & SMS to FAX for Australian Land Lines
- NO LOCK IN CONTRACTS!
- Free 25 text messages to get you started
- Credit's pre purchased for text messages NEVER EXPIRE!

Note: Information published here is accurate at the time of publishing and is subject to change without notice.

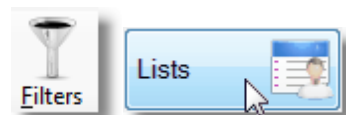
## How To Send a Text Message

Here are the basic steps to produce and send an SMS message.

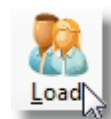
- 1.Open the SMS manager from the Explore Tab.



- 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.



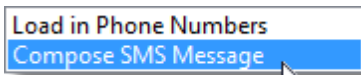
1. Compose your SMS message. See [Compose SMS Message](#)



1. Send your SMS Message. See [Send](#)



### Compose SMS Message



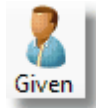
Selecting the Compose SMS Message option lets you type your SMS message for sending and also set the Schedule for when you want to send the SMS message.



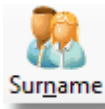
Click on each part of the Compose SMS window below to learn more about this area.

	Tagged	Txt's to Send	Cost
People :	108	108	\$8.64
Tracking :	0	0	\$0.00
<b>Total :</b>	<b>108</b>	<b>108</b>	<b>\$8.64</b>

## Toolbar



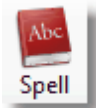
Insert the Given Name of the recipient in the message. This is ideal for personalising each message.



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](http://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 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

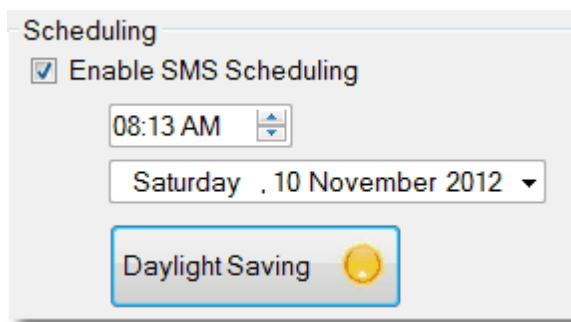
If you are sending all messages to people in the same time zone, then the date and time shown in the Scheduling area is the date and time the message will be sent. If some people are not in your current time zone, please have consideration for when the message might arrive!

## 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



### 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.

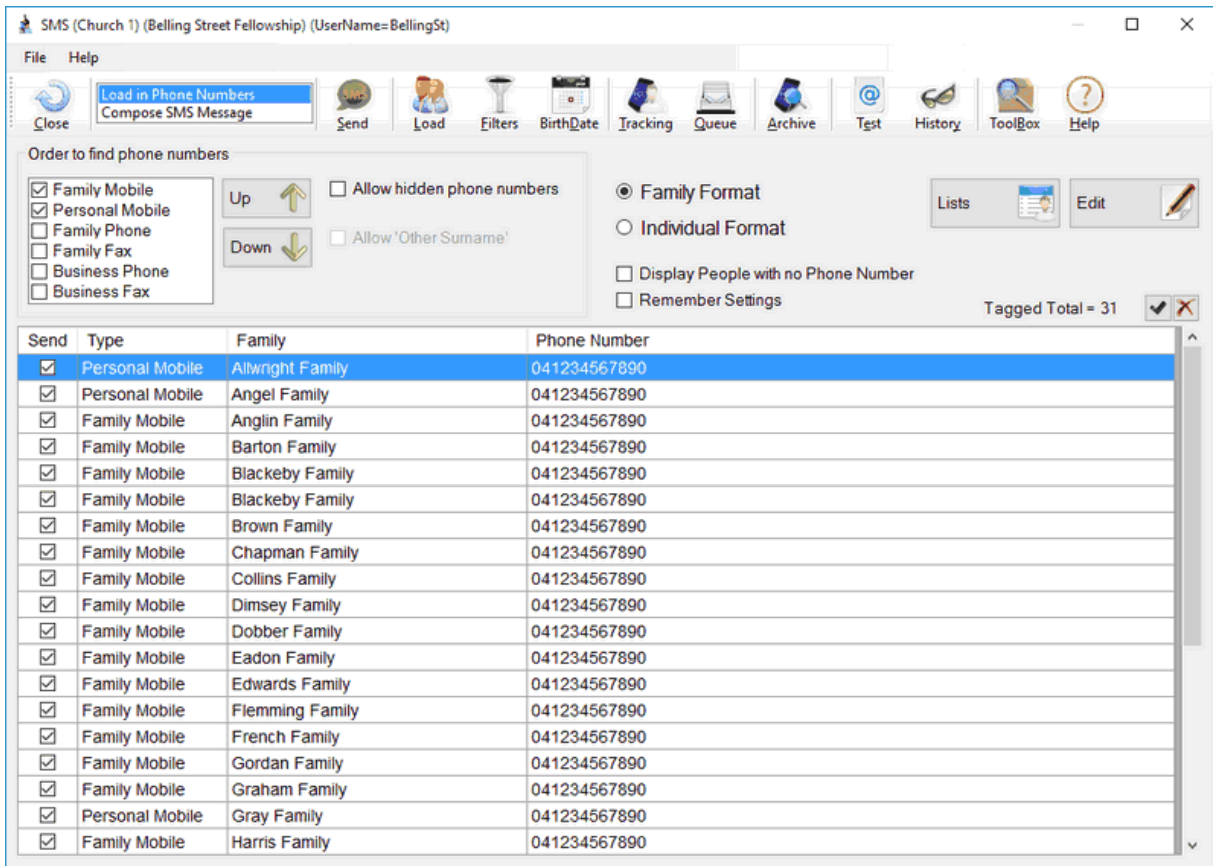
See also [SMS Manager](#) for a general overview of this program.

### 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.



### 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](#).

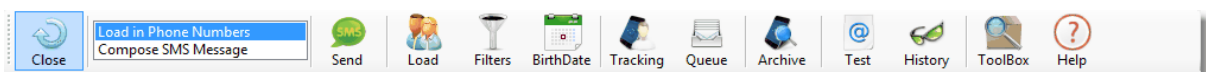
See also [Phone Number Priority](#) for information on how Pastoral Care selects phone numbers for messaging to, and how you can control this to suit your own needs.

### Toolbar

The SMS Toolbar contains all the main controls for creating and sending SMS messages.



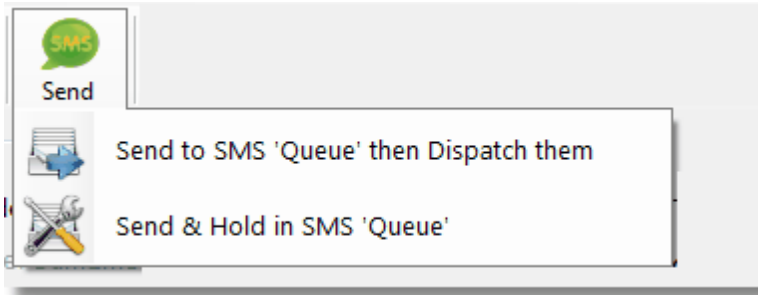
Click on each part of the toolbar below to learn more.



## Send



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

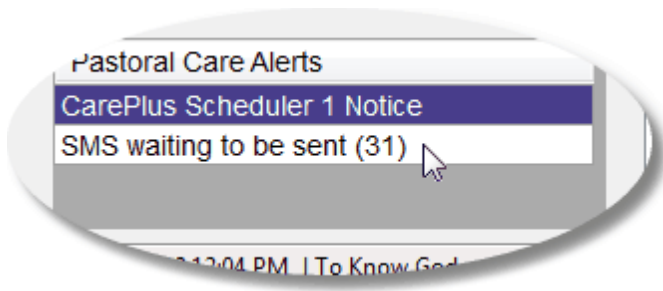


### Send to Queue and Dispatch

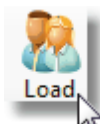
This option sends the SMS messages immediately. In either case, all SMS messages must go via the new Pastoral Care [SMS Queue](#) program. This program handles SMS messages and allows control / use of Pastoral Care itself to remain with the user while messages are being sent.

### 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.

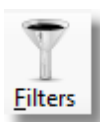


## Load



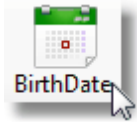
Select Load to load people into the SMS manager for selection to send messages to.

## 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**



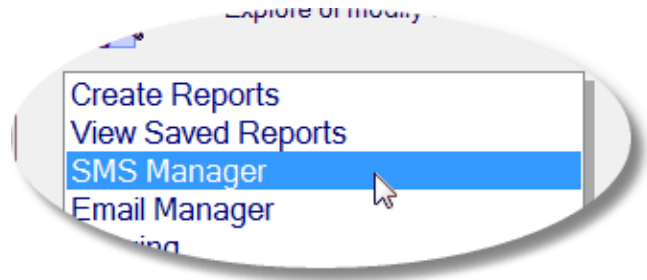
How cool would it be for everyone in your church to automatically receive a Happy Birthday SMS on their birthday! As long as you have birthdate information saved in the family file, you can schedule an encouraging Birthday Greeting to church members. After clicking on Birthdate on the SMS Manager toolbar, the following window is displayed.

**Important Information**

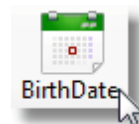
After you schedule a Birthday Greetings, the money for that greeting is not spent yet. It will be consumed when and only when the text message is delivered. Also, once a message has been scheduled, it is committed at SMS Global to be sent. **Pastoral Care is no longer in control of that message.**

**How To Schedule a Birthday Greeting**

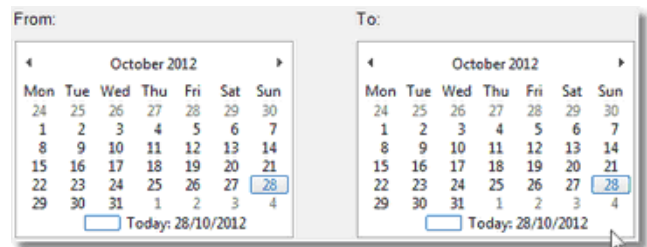
Open the SMS manager from the Explore Tab.



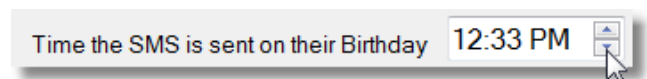
Click on Birthdate on the SMS Toolbar



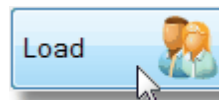
Select a From and To date range to find all people who are having a birthday between those dates.



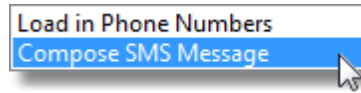
Set the time that you want to send the message on each person's birthday.



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



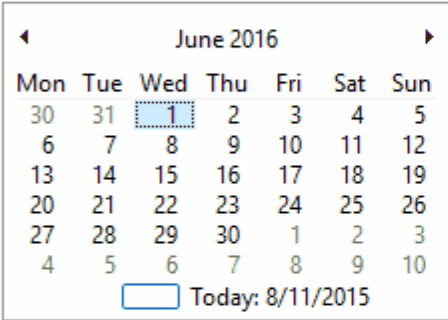
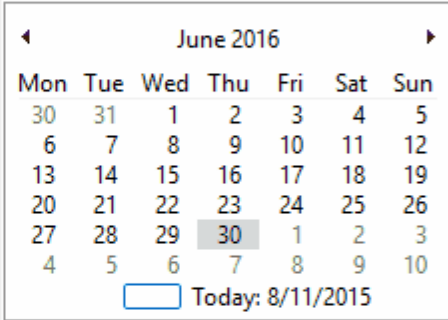
Click on each part of the Birthdate Window to learn more about this feature.

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.

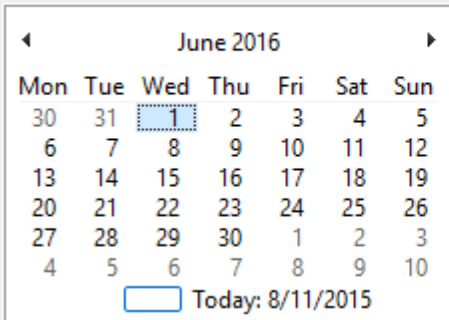
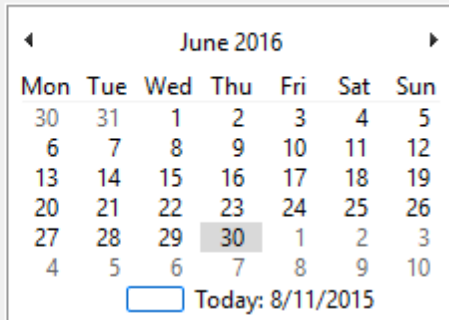
From:  To: 

Time the SMS is sent on their Birthday

Do not load people who have already received a birthday SMS in the year 2016

Enable Age Filter  To  Years

Set the Date Range to gather all people having a birthday in between the From and To dates selected

From:  To: 

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!

Time the SMS is sent on their Birthday 01:35 PM

Do not load people who have already received a birthday SMS in the year 2016

This option is best left Ticked On. It will ensure that people do not receive more than 1 greeting in each year.

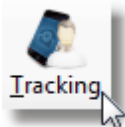
Enable Age Filter 18 To 18 Years

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 Tracking

Send Tracking messages To...

Tag	Surname	Given Name	Phone Number
<input type="checkbox"/>	Young	Frank	0400111111

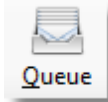
< >

Help ? Save Close



### SMS Queue

The SMS Queue area is in fact a new program that is automatically controlled from Pastoral Care it'self. 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	29/12/2015	\$0.08	0400123456	Allwright Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Angel Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Anglin Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Barton Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Blackeby Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Blackeby Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Brown Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Chapman Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Collins Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Dimsey Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Dobber Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Eadon Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Edwards Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Flemming Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	French Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Gordan Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Graham Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Gray Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Harris Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Jones Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Kean Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Knight Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Leah Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	Lynch Family		Roster Reminder, Dear
<input checked="" type="checkbox"/>	Ready	29/12/2015	\$0.08	0400123456	McGoy Family		Roster Reminder, Dear

### 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.

Delete Highlighted SMS messages

Delete All Tagged SMS messages

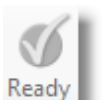
Delete All 'Error' Status SMS messages

Delete All 'Ready' Status SMS messages

Delete All SMS messages



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	1/11/2015	\$0.08	0400222222	Marion Allwright		Hi Marion, you are rosters
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Peter Angel		Hi Peter, you are rostr
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Belinda Angel		Hi Belinda, you
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Katey Anglin		Hi Katey, you
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Levi Anglin		Hi Levi, you
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Ethel Barton		Hi Ethel, you a
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Ernie Barton		Hi Ernie, you a
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Karren Barton		Hi Karren, you r
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Dot Blackeby		Hi Dot, you
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Frank Blackeby		Hi Frank,
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	John Brown		Hi John, y
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Adrien Chapman		Hi Adrien, you
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Lorraine Dimsey		Hi Lorraine, you
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Joel Graham		Hi Joel, you are ro
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Wendy Jones		Hi Wendy, you are
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Ryan Jones		Hi Ryan, you ar
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Jill Jones		Hi Jill, you ar
<input checked="" type="checkbox"/>	Ready	1/11/2015	\$0.08	0400222222	Steve Jones		Hi Steve,

### 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.

Edit SMS
— □ ×

Close
 Save
 Clear
 Spell
 To:
 Help

Person receiving message :       Message being sent to:

Return ID:

Hi Marion, you are rostered on for 9:30am Traditional Offering on the 26/12/2016. Please contact team leader if unable to make this commitment.

WE HAVE ADDED EXTRA TEXT AT THE END OF THIS COMPOSED MESSAGE

Enable SMS Scheduling

Characters : 207

Txt Messages : 2

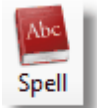
Cost to send Message : \$0.16



Save any changes made to the message. Press Close to return to the SMS Queue program.



Clear the SMS message ready to type a new message for the current person.



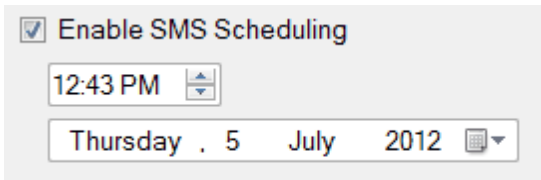
Access the Spell Checker Settings



Change the person you are sending this message to.



Edit the currently selected text message.

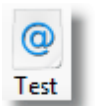


Make a change to a schedule, or add a schedule for the selected text message.

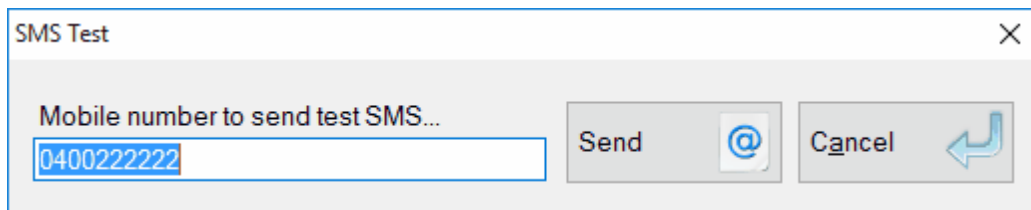
### Archive

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!

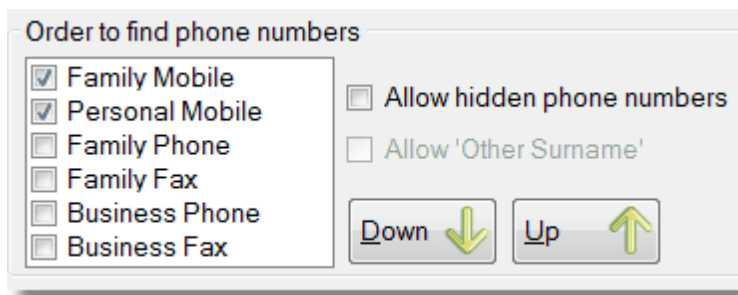


## History



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.

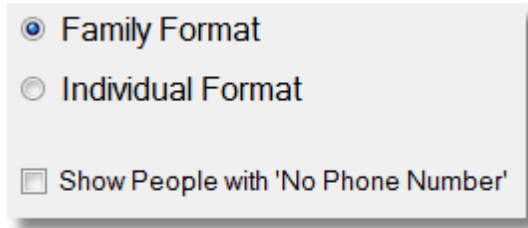
## Hidden Phone Numbers

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



A screenshot of a settings menu with three options: 'Family Format' (selected with a radio button), 'Individual Format' (unselected with a radio button), and 'Show People with 'No Phone Number'' (unselected with a checkbox).

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!

### 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.


SMS Lists


New List Name


Double Click on list name to view members


- All Church List
- Leadership List
- Youth List


Save New List 


Load List 


Add to List 

Edit List 

Delete List 

Re Save List 

Help 

Close 

### New List Name

New List Name

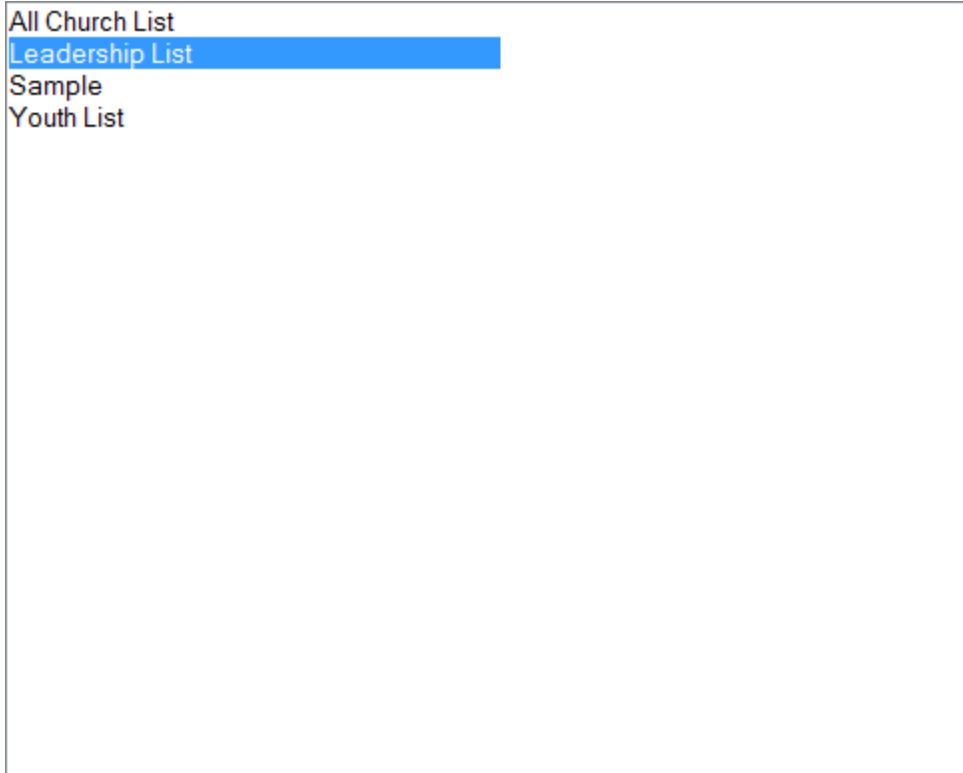
Enter a new name for an SMS list here. The Press the [Save New List](#) button to save all currently loaded and ticked people to this new list name.

### Phone List to send to

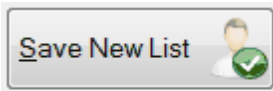
This is the loaded people you are about to send a message to. All people with a tick in the Send column are those that will receive a text message.

### 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.

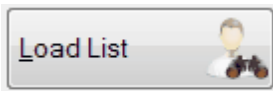


### Save New List



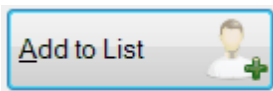
To save a new list, simply have all the people you want in the list already loaded and ticked in the SMS Manager, enter a [New List Name](#) and press the Save New List button.

### 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

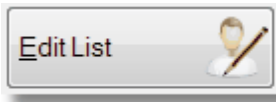


To Add people to a list follow this procedure.



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	Personal Phone (Marion Personal Mobile)
<input type="checkbox"/>	Angel Peter	Automatic
<input type="checkbox"/>	Anglin Brent	Automatic
<input type="checkbox"/>	Anglin Katey	Automatic
<input type="checkbox"/>	Anglin Mathew	Automatic
<input type="checkbox"/>	Anglin Levi	Automatic
<input type="checkbox"/>	Anglin Kerry	Automatic
<input type="checkbox"/>	Barton Ray	Automatic
<input type="checkbox"/>	Barton Ethel	Automatic
<input type="checkbox"/>	Barton Ernie	Automatic
<input type="checkbox"/>	Barton Karren	Automatic
<input type="checkbox"/>	Blackeby Dot	Automatic
<input type="checkbox"/>	Blackeby Helen	Automatic
<input type="checkbox"/>	Blackebv Heather	Automatic

Method to find phone numbers

Automatic       Fixed

Working with: Allwright Marion

Available phone numbers

Marion (Personal Mobile 041234567890)

Family Phone (054-33-5478)

Marion (Business Phone 054-229876)

Other family members phone numbers

Stephen (Personal Mobile 041234567890)

Stephen (Business Phone 018-998725)

**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

Automatic
  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 /

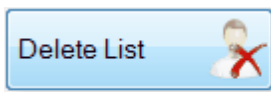
Individual format options.

## 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.

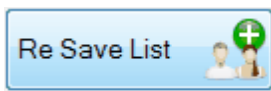
You can see from the sample above, Brent's Personal Mobile has been manually selected for use when this list is used, and a message is sent to Brent Anglin.

## 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
041234567890	Personal Mobile	Stephen	No
018-998725	Business Phone	Stephen	No
041234567890	Personal Mobile	Marion	No
054-229876	Business Phone	Marion	No

## 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](#)

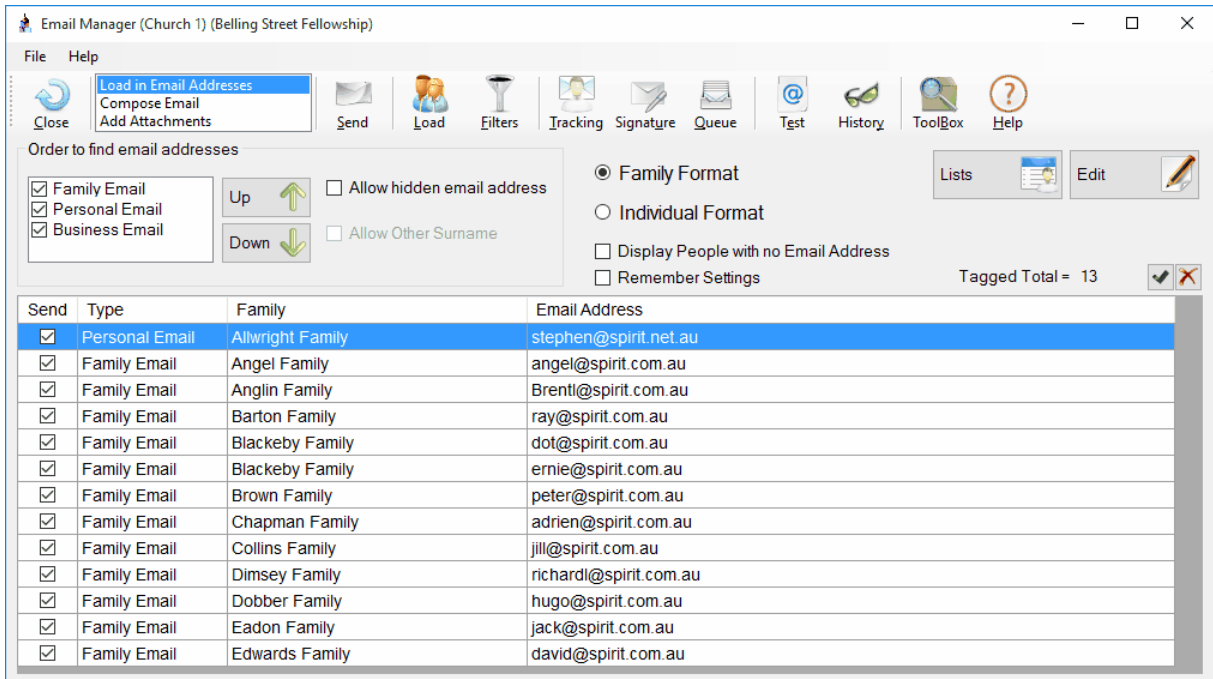
## Email Manager Main Window

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.

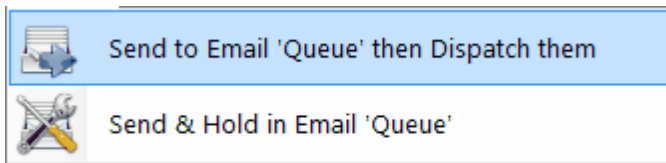


## Send



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

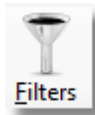
This option sends all tagged people the composed email, and holds them in the queue to be sent later (manually from the queue)

## Load



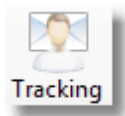
Press the Load Button to load people into the Email Manager for sending an email to. People can be loaded as Individuals, or FamilyBased email loading can be selected. See [Email Format](#) for more on Individuals vs Families.

## Filters



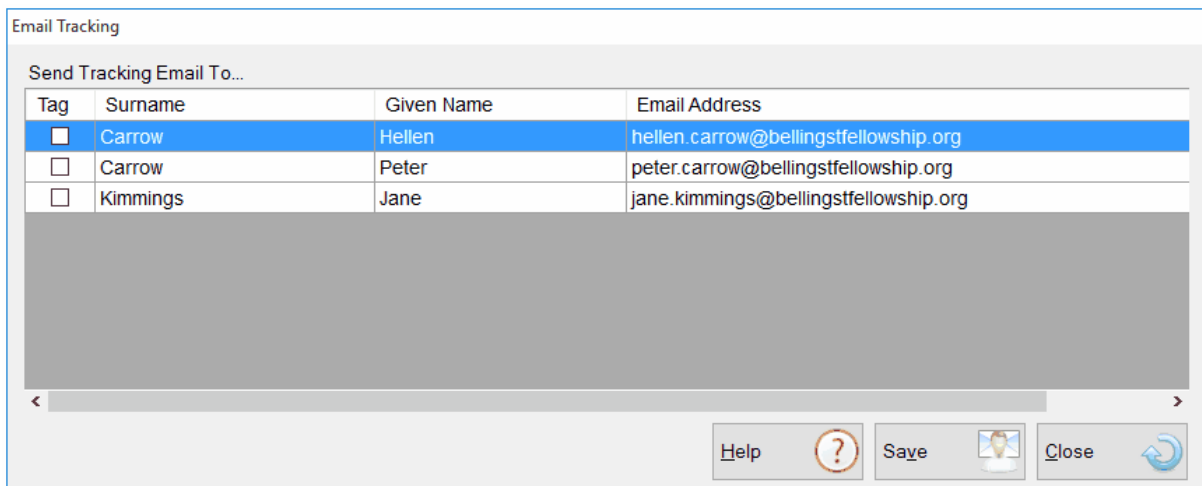
Press the Filters Button to use the standard Pastoral Care [Filters](#) to locate people by groups and many other criteria.

## Tracking



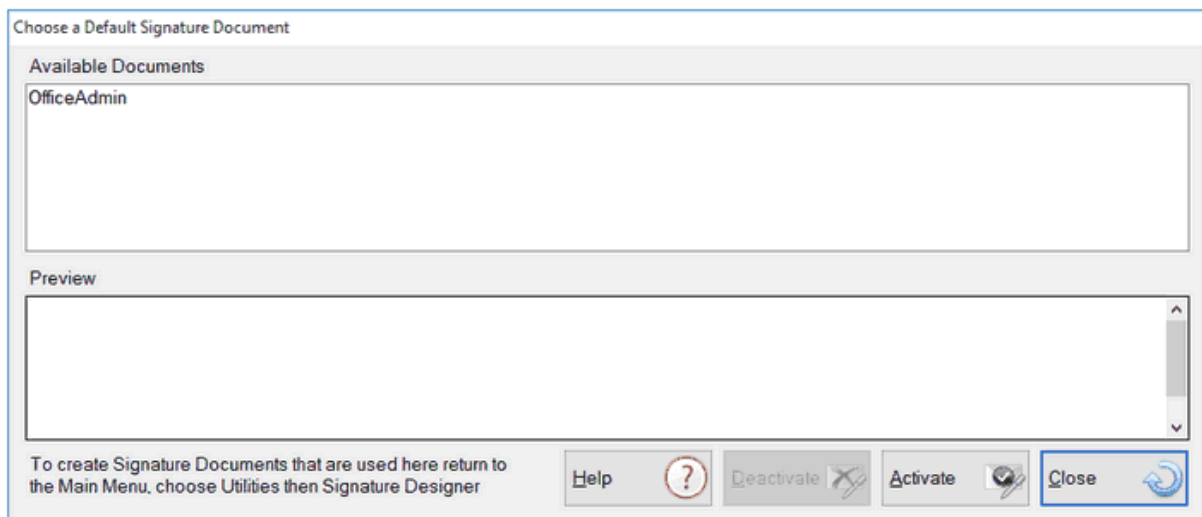
The Tracking Feature lets you select pre-setup email addresses to send a BCC to (Blind Carbon Copy) of the email. The tracking email will tell the recipient who the email was sent to, and what was in the email.

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.



## Signature

This window lets you set the DEFAULT signature to use for the current workstation. Simply select the Signature File listed in the top section, and press Activate. Pressing Deactivate will remove the default signature. See [Signature](#) for more information on this

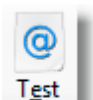


## Queue



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



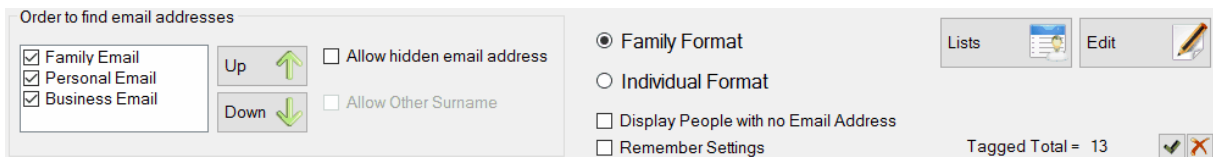
Press the History button to see a list of sent emails. The History window shows the last 200 emails sent, the Subject, Body and who the emails were sent to is recorded.

### Load In Email Addresses

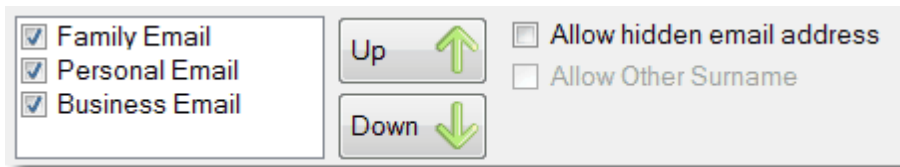
Loading in emails is simply the process of choosing who you want to email, and which email address you want to use for each person. As with many areas of Pastoral Care, you can choose to compose an email for Individual people, or a more Family orientated email. This can be done by selecting the Family or Individual Format options. (See [Email Format](#))



Click on each area below to learn more about loading in email address information.



### Order to Find Addresses



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

- Family Format
- Individual Format
- Show People with No Email Address

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!

## 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.

**Email Lists**

New List Name

Double Click on list name to view members

All Church List

Leadership List

Youth List

Save New List

Load List

Add to List

Edit List

Delete List

Re Save List

Help

Close

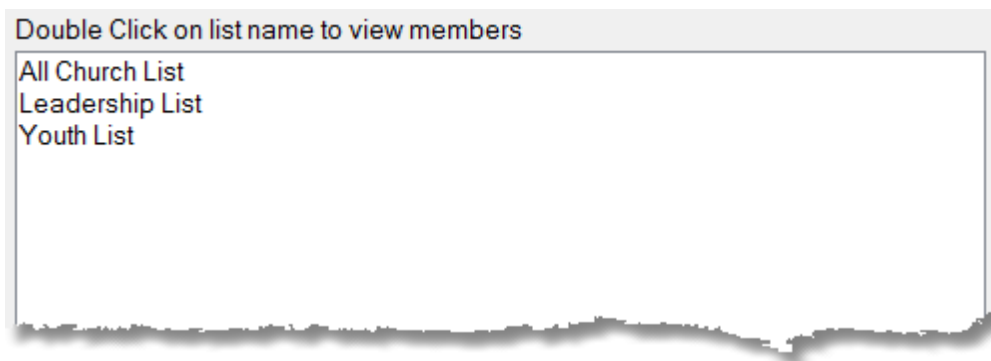
### New List Name

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.

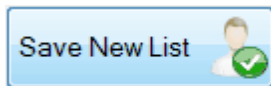
New List Name

### 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.

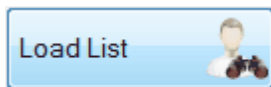


### Save New List



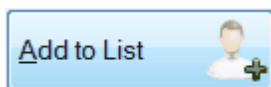
After entering a new name in the [New List Name](#) box, press the Save New List button to save all currently tagged people to that new list.

### Load List



Press the Load List to load all people attached to the selected list.

### Add To List

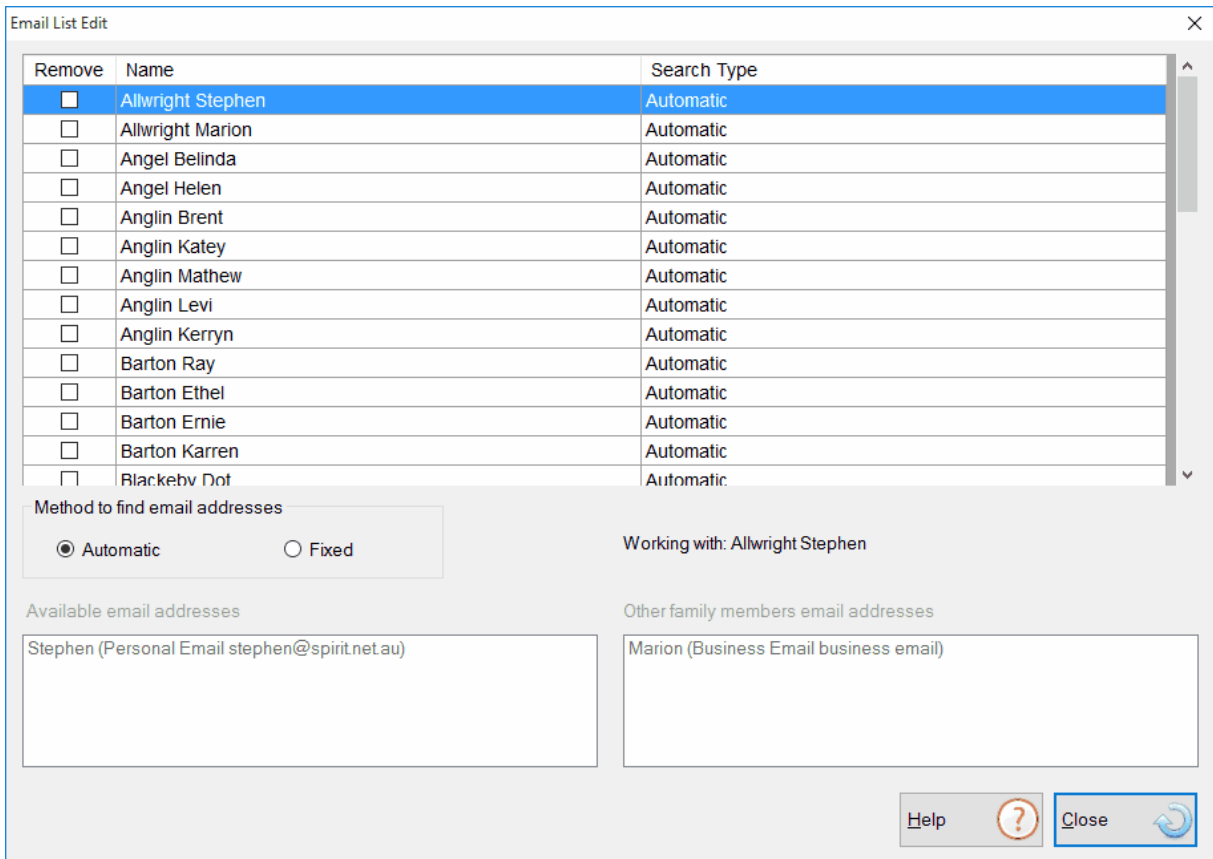


Pressing the Add To List button takes all Currently Tagged people in the Email Manager (People you have loaded and tagged) and adds them to the selected list.

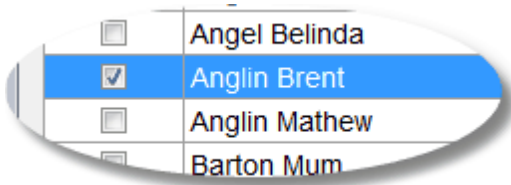
### Edit List



Click on each part of the Edit List window below to learn more about editing Email Lists.



**Remove**

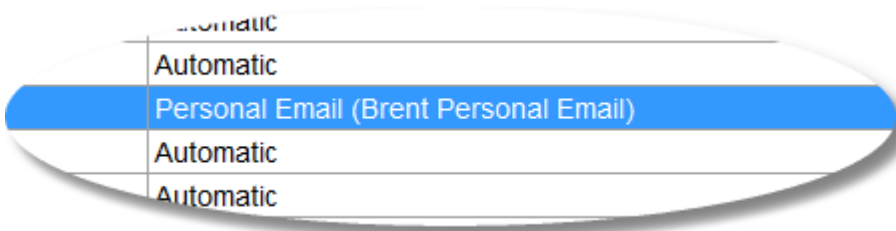


Tick a person in the Remove Column to remove them from the current Email List.

**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

The screenshot shows a software interface for managing email addresses. At the top, it says 'Method to find email addresses' with two radio buttons: 'Automatic' (unselected) and 'Fixed' (selected). To the right, it says 'Working with: Allwright Marion'. Below this, there are two list boxes. The left one is titled 'Available email addresses' and contains one entry: 'Marion (Business Email marion@thenet.com)', which is highlighted in blue. The right one is titled 'Other family members email addresses' and contains one entry: 'Stephen (Personal Email stephen@spirit.com.au)'.

## Automatic

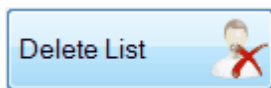
On Automatic, Pastoral Care will use the load order options set in the main screen of the Email Manager to select the address to use. The load options include the Order to find Email Addresses and the Family / Individual format options.

## 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.

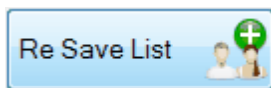
You can see from the sample above, Marion's Business Email has been manually selected for use when this list is used.

### 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

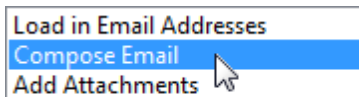


Press the Tag All button to tag all people in the list to receive a message.

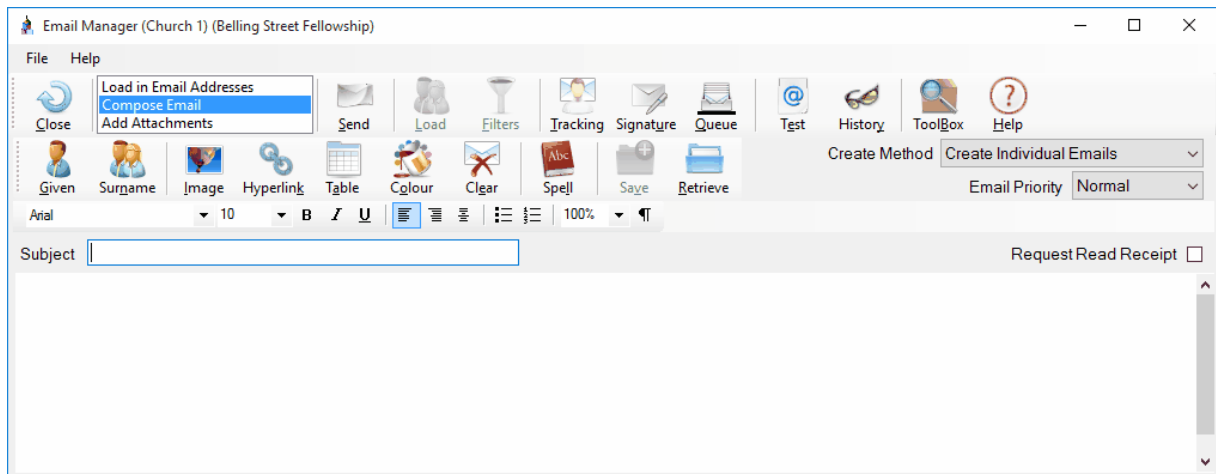


Un Tag all people in the list

## Compose Email

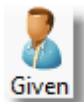


The Compose Email option changes the Email Manager screen into a mode for creating an email. Click on each part of the Compose Email window below to learn more.



## 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.



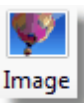
Set the colour of your text or background of text to any colour you desire!



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.



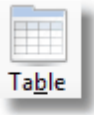
Access the Spell Checker Settings



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.



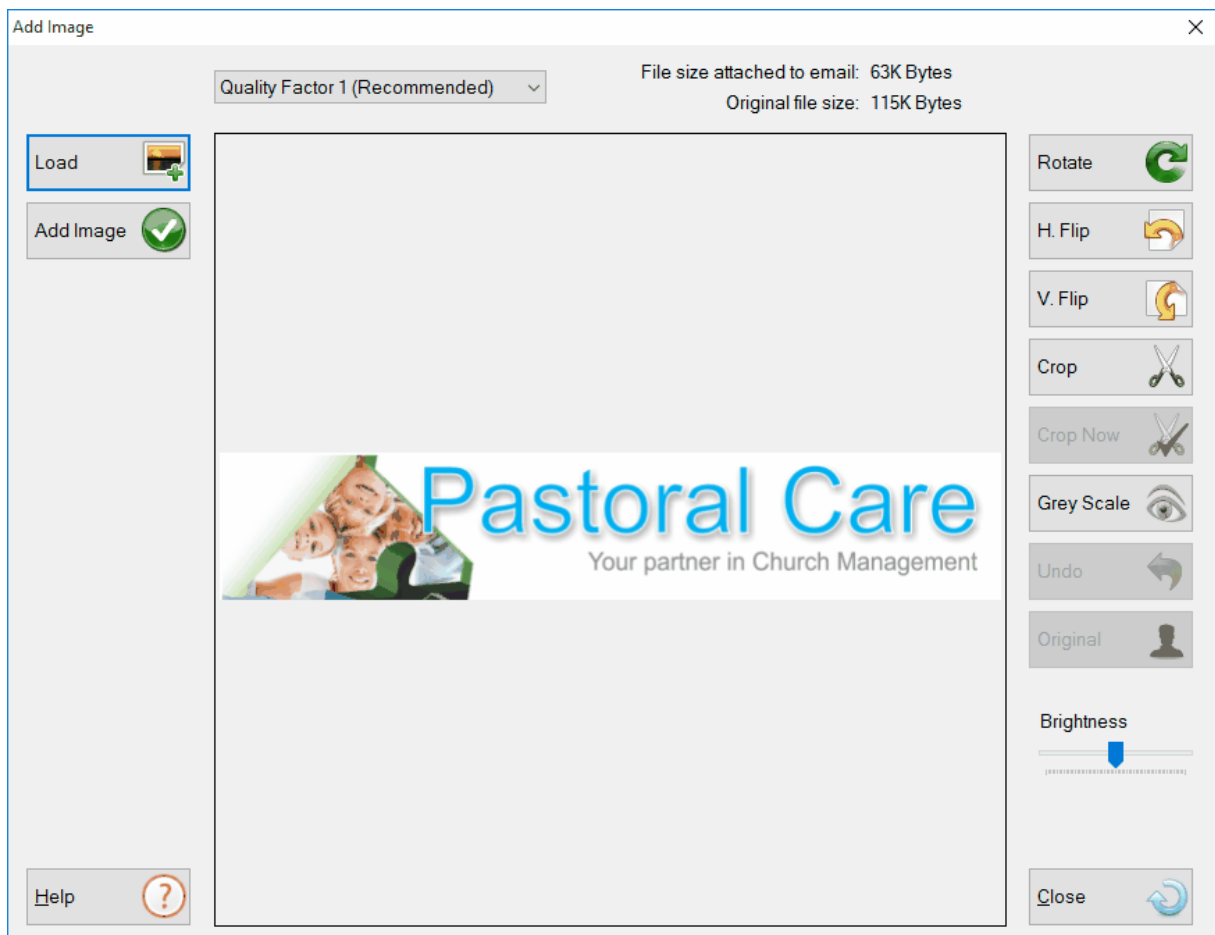
Insert a Table into the email. Tables are ideal for laying out an email with just the way you want to see it. Table borders can be transparent giving to the ability to place text and graphics in specific locations.



Load in a saved email for use. Naturally the loaded email can be edited and changed if required.

### 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.

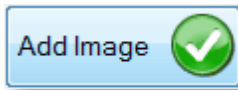


### Load



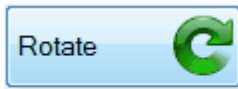
Load an image from a file to be added to the email.

### Add Image



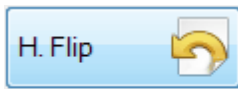
Add the selected (and modified if you have done any modifications) image to the current position in the email. Note once an image has been added, you can re-size the image directly in the email using the mouse to click and drag the corners of the image.

### Rotate



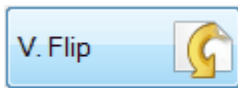
Rotate the image 90 Degrees to the right. Keep pressing this to continue the rotation in 90 degree steps.

### H Flip



Flip the picture (mirror) horizontally.

### V Flip



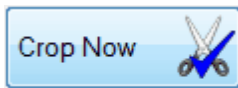
Flip the picture (mirror) vertically.

### Crop



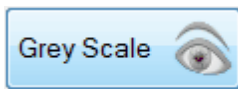
Select an area of the picture to crop.

### Crop Now



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

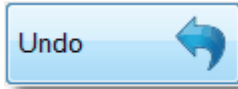
### Grey Scale





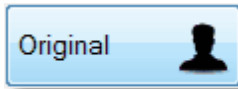
Convert the picture to grey tones only.

### Undo



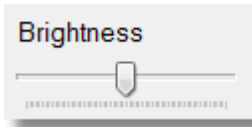
Where available, you can press this to undo the last edit to the picture.

### 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.

**Create Hypertext Link**

**Link text**  
Enter text to be displayed for the link  
See our web site for details

**Link location**  
Enter a web page location for the hyperlink  
http://www.ourchurchweb.org.au

Cancel OK

## Font Options

Use the standard font controls for setting the font for the selected text, bold, italic underline etc.

Arial 10 B I U [List Icons] 100%

## Subject

Subject Enter your email subject here

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.

## 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

Request 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.

## Create Method

Create Method Create Individual Emails

Force the email program to handle the emails as either Family or Individual Emails.

## Email Priority

Email Priority Normal

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.

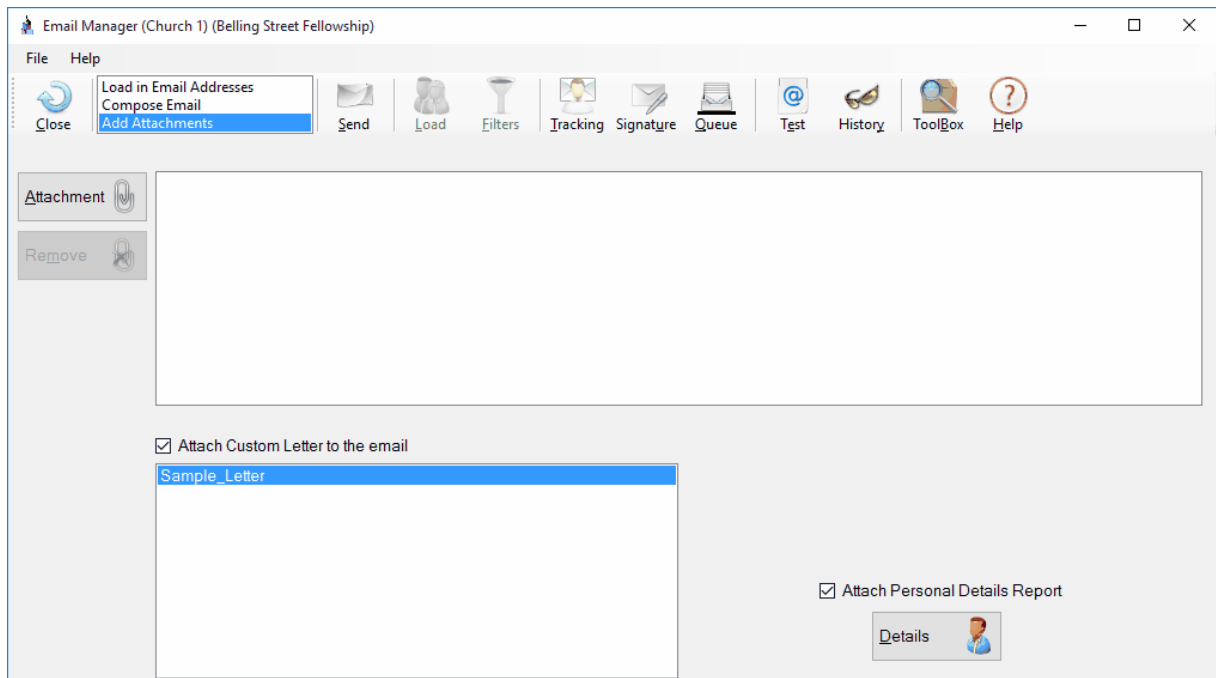
## Add Attachments



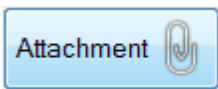
The Add Attachments area lets you add a number of different attachments. As well as any file you can select from your computer, you can also select a Custom Letter to be auto field merged and attached as a PDF document, or a Personal Details Report to be created and attached as a PDF document.



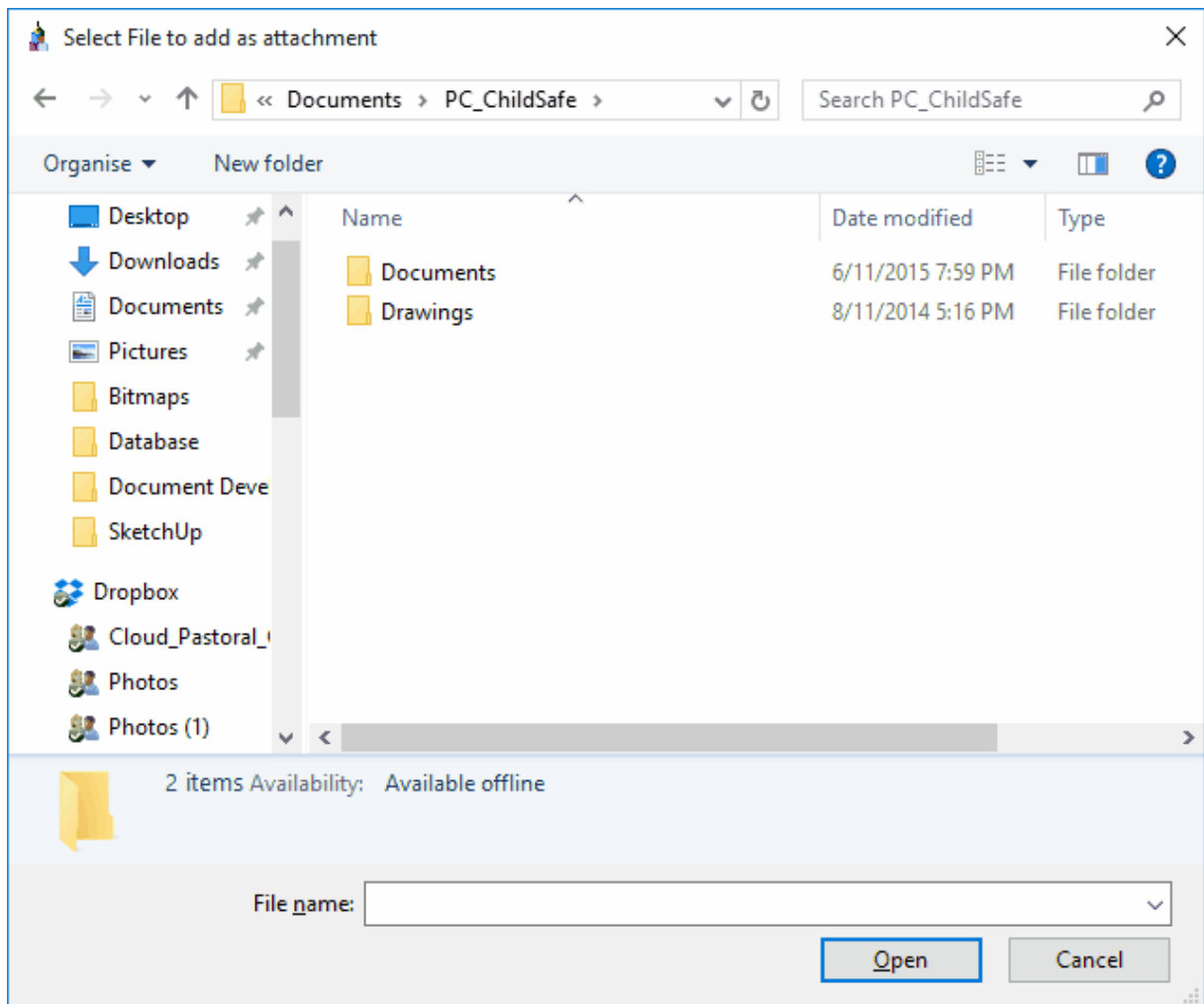
Click on Click on each part of the Add Attachment window below to learn more.



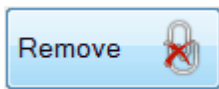
## Attachment



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
<a href="#">Individual Details</a>	Add or remove people from Individual properties such as Conditions, Gender, Titles and Occupations.
<a href="#">Status</a>	Add people or remove people from Status groups.
<a href="#">Individual Groups</a>	Add people or remove people from Individual groups.
<a href="#">Active and Potential Ministries</a>	Add people or remove people from Active or Potential Ministry groups.
<a href="#">Individual Dates</a>	Add people or remove people from Individual Date groups.

<b>Flexi Fields</b>	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.
<b>Medical Groups</b>	Add people or remove people from Medical groups, including adding medical notes on mass to all tagged people.
<b>Relationships</b>	Add people or remove people from Relationship groupings with other people.
<b>Email and SMS Lists</b>	Add people or remove people from Email and SMS Lists.
<b>Reports</b>	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

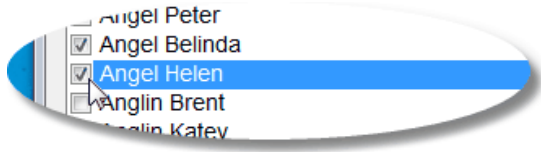

Area	Tagging Functions Available	See
<b>Family Details</b>	Add or remove people from a Family Condition (Active, Archive etc), set a Visitation Target for all tagged people and add a File Memo to all tagged people.	<a href="#">Family Details</a>
<b>Visitation</b>	Tag people for a Visitation Request. This includes setting a Visitation Team and Team Member to visit the tagged people.	<a href="#">Visitation</a>
<b>Family Groups</b>	Add people or remove people from Family Groups.	<a href="#">Family Groups</a>
<b>Family Dates</b>	Add people or remove people from Family Dates. You can add a Date Tag, a Date or Both to all tagged people.	<a href="#">Family Dates</a>
<b>Suburb</b>	Add people or remove people from a Suburb.	<a href="#">Suburb</a>
<b>Format Fields</b>	For the tagged people, format selected fields with Upper Case, Sentence Case or Lower Case options.	<a href="#">Format Fields</a>
<b>Reports</b>	Output selected people to ANY report in Pastoral Care, including Custom Directories, Custom Reports, Analysis Reports and any built in Pastoral Care report.	<a href="#">Reports</a>

## 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

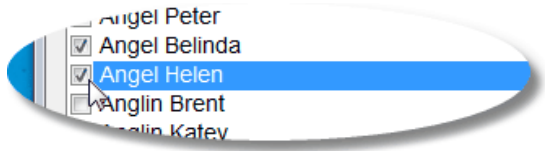
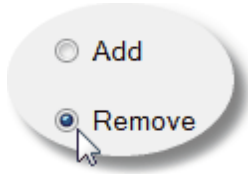
To tag people and add them to a group complete the following process:  
From the Tagging area (available from the Main menu - Explore Tab)...

Step	Action	See
1	Select Individual or Family Categories to work with.	<a href="#">Processing Mode</a>
2	Set any filters to restrict the people you want to work with to a selected range of people.	<a href="#">Filters</a>
3	Press Load on the Tagging Toolbar to load the people into	<a href="#">The Tagging Toolbar</a>
4	Choose a Category from the Available Categories List.	<a href="#">Available Categories</a>
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	<a href="#">The Tagging Toolbar</a>

### 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](#)

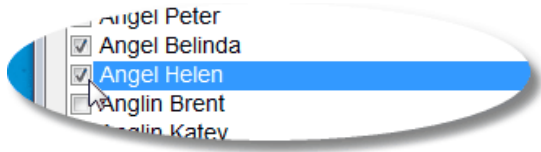
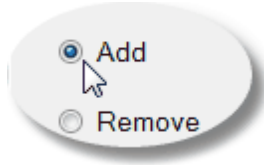
### Join two home groups together

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. | <a href="#">Processing Mode</a> |

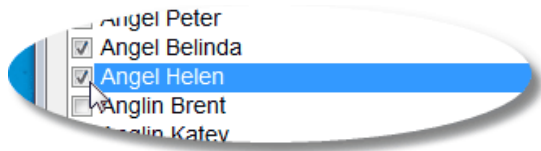

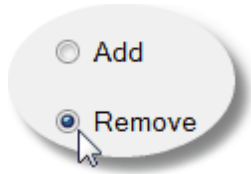


- 2 Select a filter for the Barkers Home Group [Filters](#)
- 3 Press Load on the Tagging Toolbar to load the people into [The Tagging Toolbar](#)
- 4 Choose the Smiths Home Group from the Individual Groups area. [Available Categories](#)
- 5 Tick ALL people in the list to process as these are all people 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.

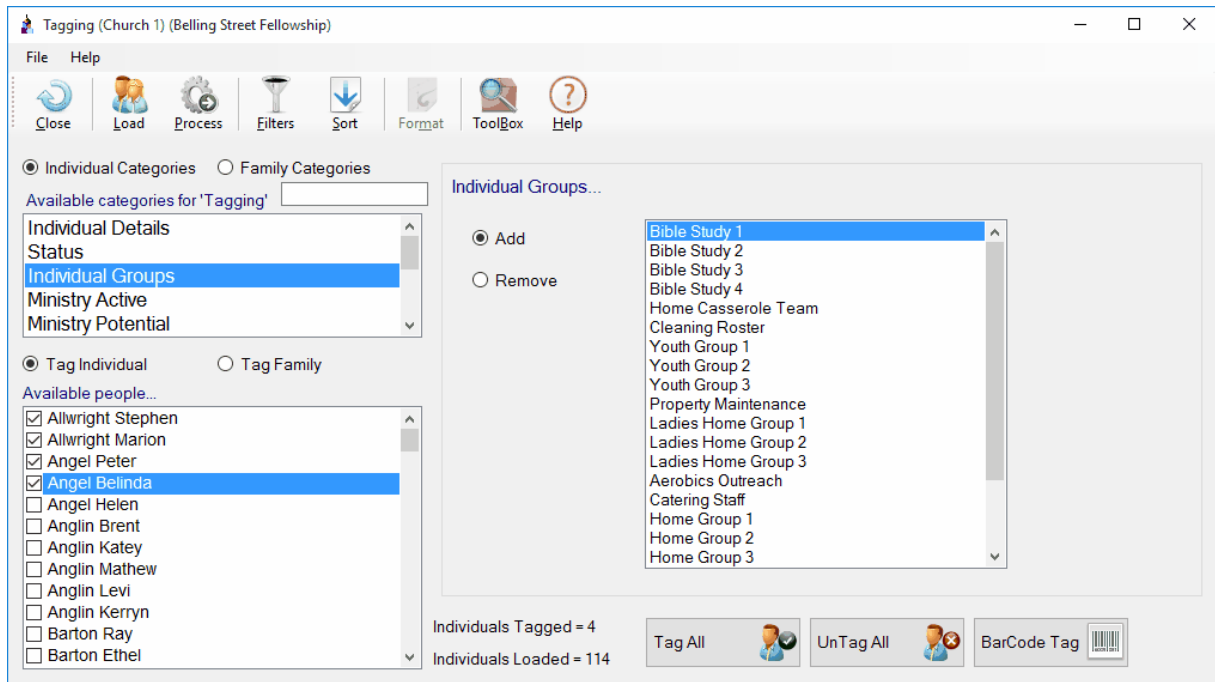
Step	Action	See
1	Select Individual Categories to work with.	<a href="#">Processing Mode</a>
2	Select a filter for the Barkers Home Group	<a href="#">Filters</a>
3	Press Load on the Tagging Toolbar to load the people into	<a href="#">The Tagging Toolbar</a>
4	Choose the Smiths Home Group from the Individual Groups area.	<a href="#">Available Categories</a>
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	<a href="#">The Tagging Toolbar</a>
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](#)

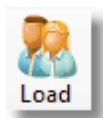


Click on each area on the window below to learn more about the Tagging feature.



## The Tagging Toolbar

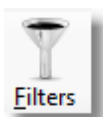
The following toolbar buttons are available on the Tagging Window.



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.

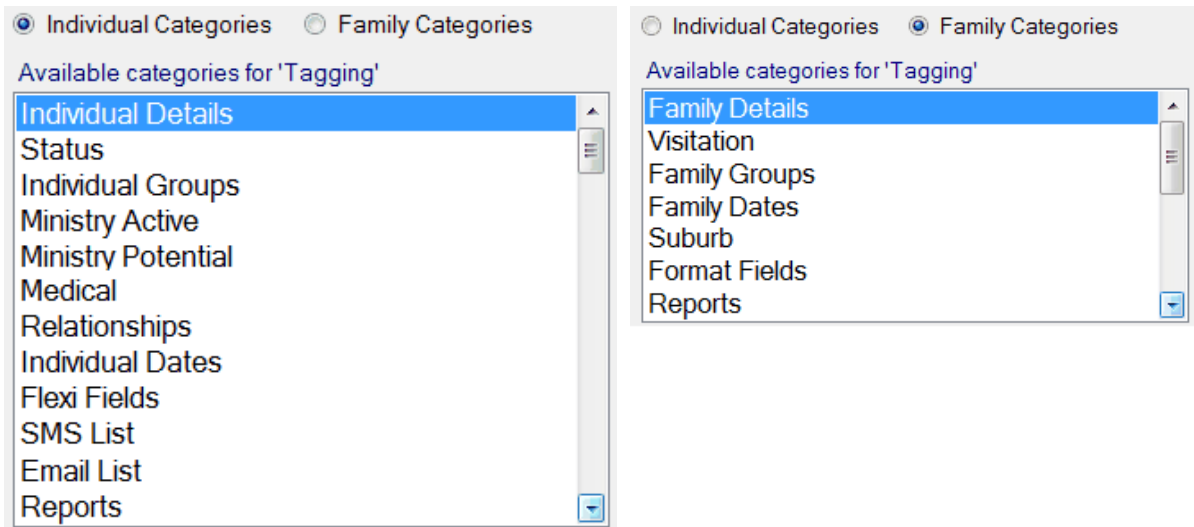
## Available Categories

Shown below are the two main lists of Available Categories for [Individual Categories](#) and [Family Categories](#) in Tagging.

(See also [Processing Mode](#))



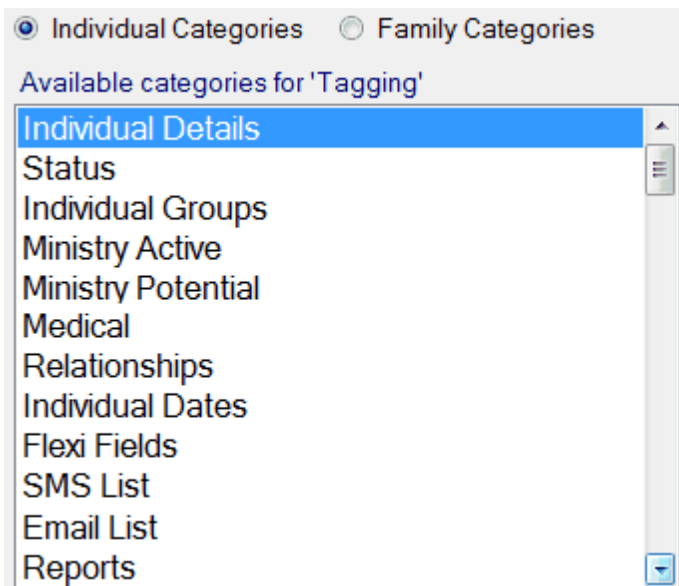
Click on each if the lists below for more information.



### Individual Categories



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 14, and you have now yet set people in their family file as Male or Female (A new field in Pastoral Care 14) 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

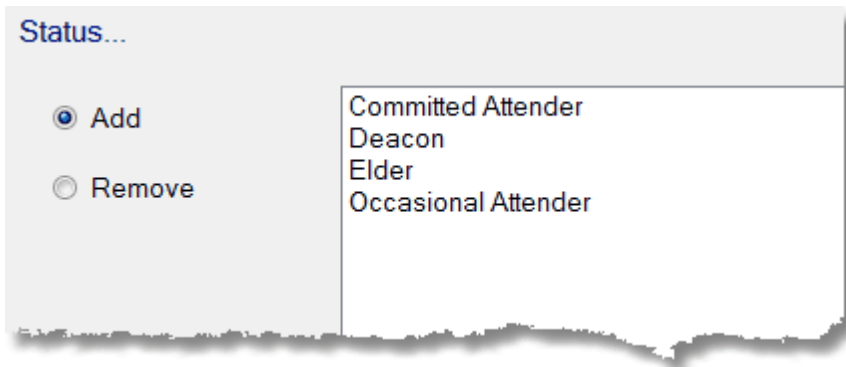
 Hidden

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.

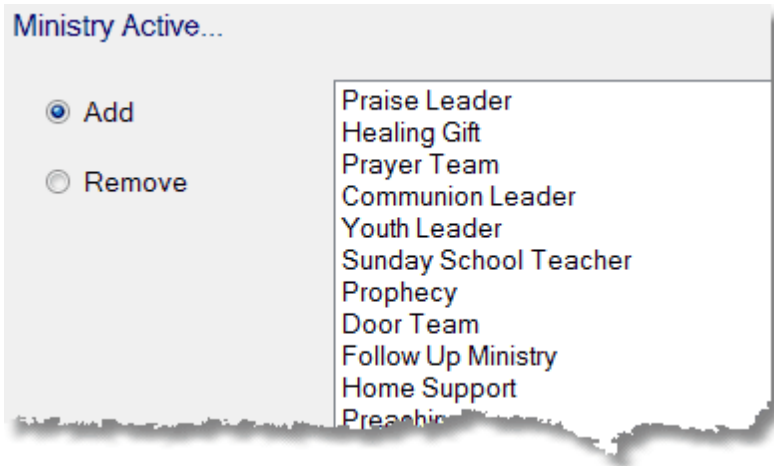
Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



### Ministry Active

Use Ministry - Active to bulk update either Adding people to an Active Ministry or Removing them from an Active Ministry.

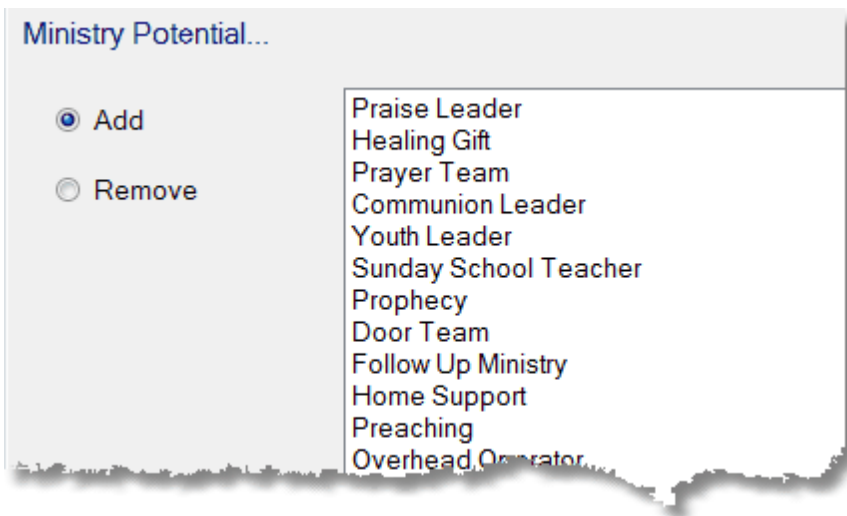
Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



### 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.



Medical...

Add

Remove

Asthma

Peanut Allergy

Medical Notes

Make sure has Inhaler and other medications at all times on church outings.

Medical notes are appended to any existing notes

## 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

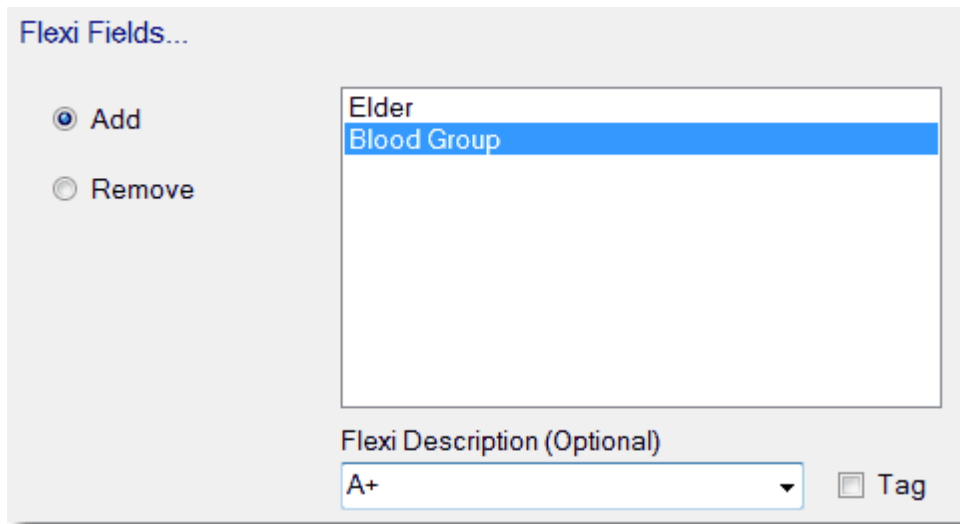
## Date Tag

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.

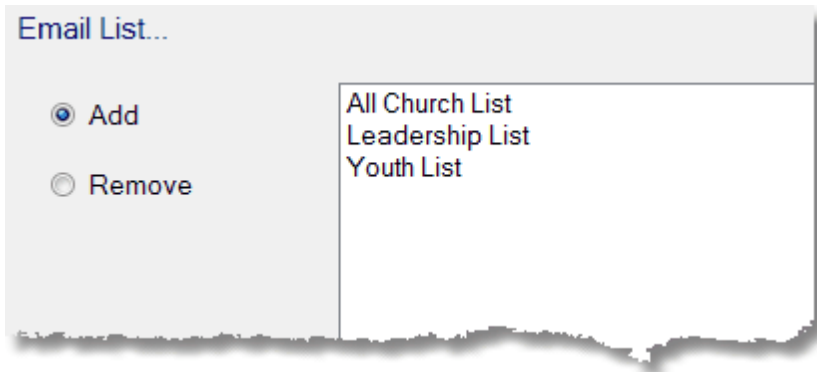
Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



## 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

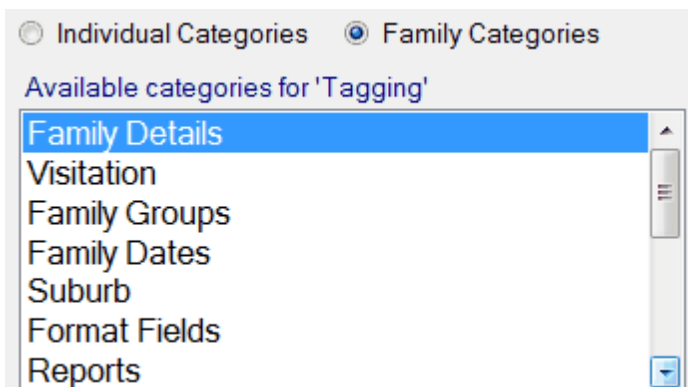
Reports lets you output tagged people to any Pastoral Care report. All reports including Custom Reports and Custom Letters and all standard built in reports and a Manual report are all available.

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**

FamilyDetails tagging lets you change a number of Family related data areas on all people (families) you have tagged.



Click on each part of the FamilyDetails feature below to learn more...

**Family Details...**

Enable Family Condition tagging

Active

Privacy Request

Prospect

Archive

Enable Family Visitation Target

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

Active

Privacy Request

Prospect

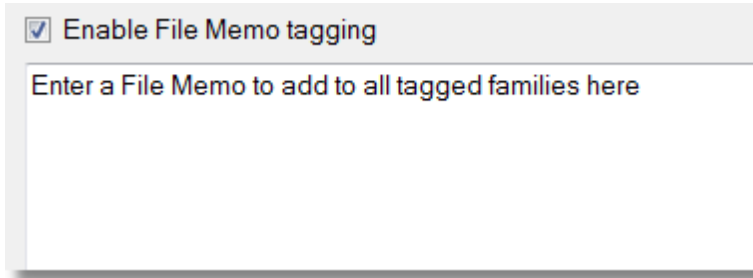
Archive

Tick this option and select a Family Condition to mark all tagged families with.

Enable Family Visitation Target

Target

Tick this option and enter a Target for the number of visitations per year that you want to visit this family.



Enable File Memo tagging

Enter a File Memo to add to all tagged families here

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.

Display Memo on opening file

Tick this option to set the "Display Memo on Opening File" option for all families you have tagged.

### 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

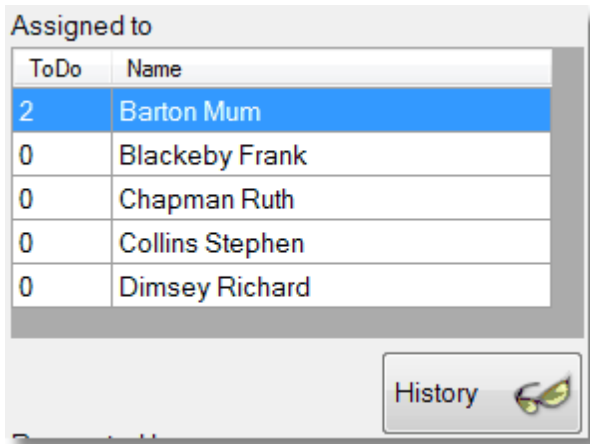
- Tag with Visitation Request  
 Tag with Completed Visitations

Choose to Tag People for a Visitation Request, OR to Tag People as having had a completed Visitation.

Visitation Team


Wellness

Select the Visitation Team that is going to complete the Visit, or who has completed the Visit.



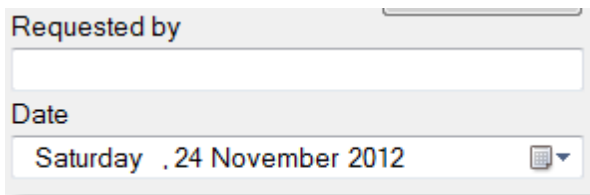
Assigned to

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

History 


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.



Requested by

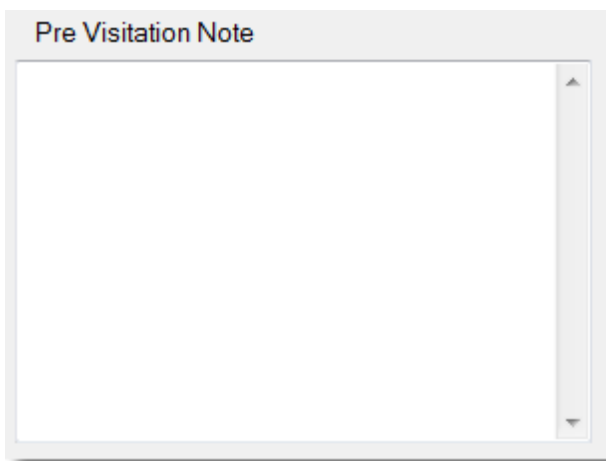
Date

Saturday .24 November 2012 

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.

Send email upon Create Request

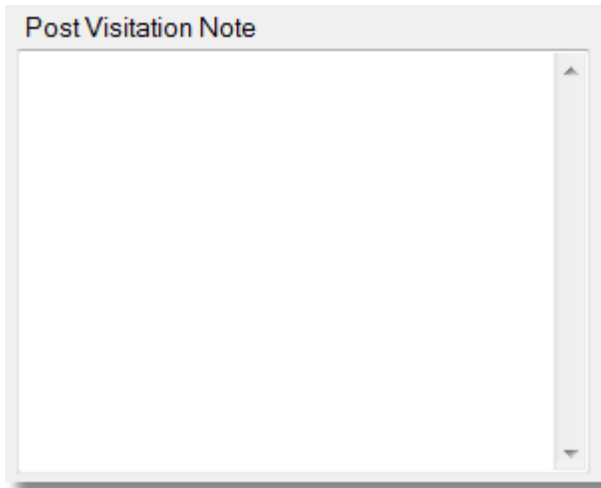
Tick this option to send an email to the selected Visitation Team member.



Pre Visitation Note

Enter a Pre Visitation Note to be added to all people you are creating the Visitation for.



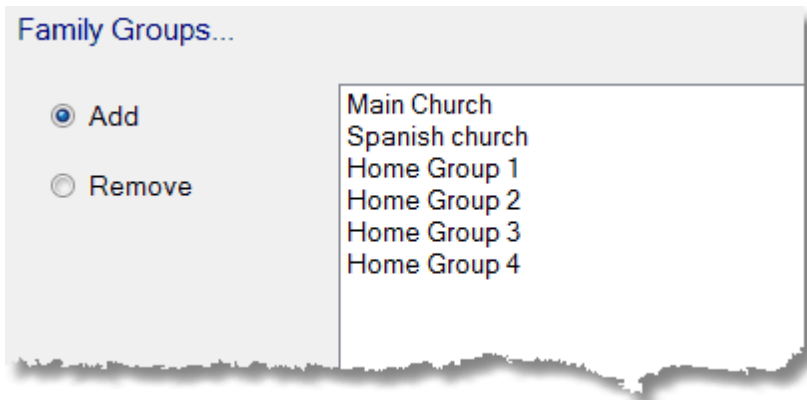


Enter a Post Visitation Note to be added to all people you are creating the Visitation for.

### Family Groups

Use Family Groups to bulk update either Adding families to a Family Group or Removing them from a Family Group.

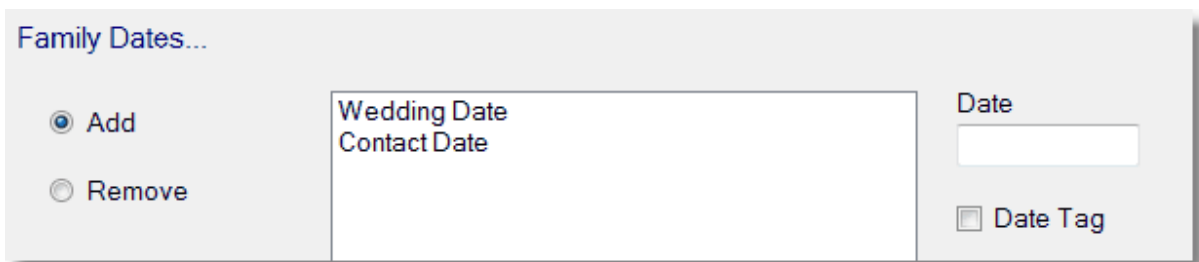
Note the sample below will look different to your groups as our sample setup may be different to your actual settings.



### Family Dates

Use Family Dates to bulk update either Adding families to a FamilyDate or Removing them from a FamilyDate.

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.

Suburb...

Add

Remove

Residential

Postal

Gisborne  
Keilor Downs  
Keilor  
Keilor Heights  
Melton  
Riddells Creek  
Sydenham  
Riddels Creek  
Sunbury  
Romsey  
Ivanhoe

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

Tag Individual  Tag Family

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.

### Add / Remove

Add  Remove

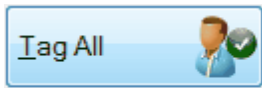
If these options are available in the Tagging area, then choosing ADD will set tagging to add people to a selected item. If REMOVE is selected, tagged people will be removed from a selected item. Some options in Tagging are ADD only, and when this is the case, the Add / Remove options shown above will be missing from the Tagging Window.

## Available People

This list shows the people you have loaded for use in the Tagging area.

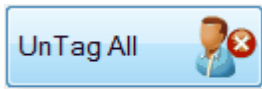


## Tag All



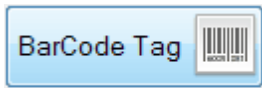
Press this button to tag all people visible in the [Available People](#) list.

## 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.

Tagging Bar Code Entry

Please scan Bar Codes while this window is open


Scan Options:

Tag all those scanned       One entry per Bar Code

Untag all those scanned

Last person scanned:

---

Close 

## 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.)

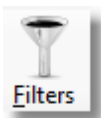
Surname	Given	Year
Angel	Helen	5
Anglin	Mathew	6
Anglin	Levi	6
Anglin	Kerryn	3
Barton	Ernie	3
Barton	Karren	4
Blackeby	Heather	5
Blackeby	Frank	3
Brown	Joshua	9
Brown	John	11
Collins	Stephen	12
Dimsey	Dodie	3
Dimsey	Mandy	3
Gordan	Wendy	5
Gordan	James	6
Kean	Nathan	7
Kean	Jannet	8
Knight	Mathew	9

### 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.

-  All People
-  Only those With a School Year
-  Only those WithOut a 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


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 14. (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)

Group History Manager (Church 1) (Belling Street Fellowship)

File Help

Close Load Filters ToolBox Help

Allwright Stephen  
Allwright Marion  
Angel Peter  
Angel Belinda  
Angel Helen  
Anglin Brent  
Anglin Katey  
Anglin Mathew  
Anglin Levi  
Anglin Kerryn  
Barton Ray  
Barton Ethel  
Barton Ernie  
Barton Karren  
Blackeby Dot  
Blackeby Helen  
Blackeby Heather  
Blackeby Frank  
Brown Peter  
Brown Heather  
Brown Joshua  
Brown John  
Chapman Adrien  
Chapman Ruth  
Chapman Hannah

Total People Loaded = 114

Group	Date In	Date Out
Youth Group 1	01/01/2013	
Youth Group 2	01/01/2013	
Ladies Home Group 1	01/01/2013	
Ladies Home Group 3	01/01/2013	
Home Group 1	01/01/2013	
Home Group 3	01/01/2013	

Delete

Total Groups Available = 6

To edit a date click on a date cell

Click in either date column to edit any date

## 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)

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
Relationship	Step father
Individual Date	Membership
Individual Date	Baptised
Email List	All Church List
Family Group	Main Church



Press the Report Button to see a report on the selected person. A sample report is shown below.

### All Group Report for 'Angel Helen'

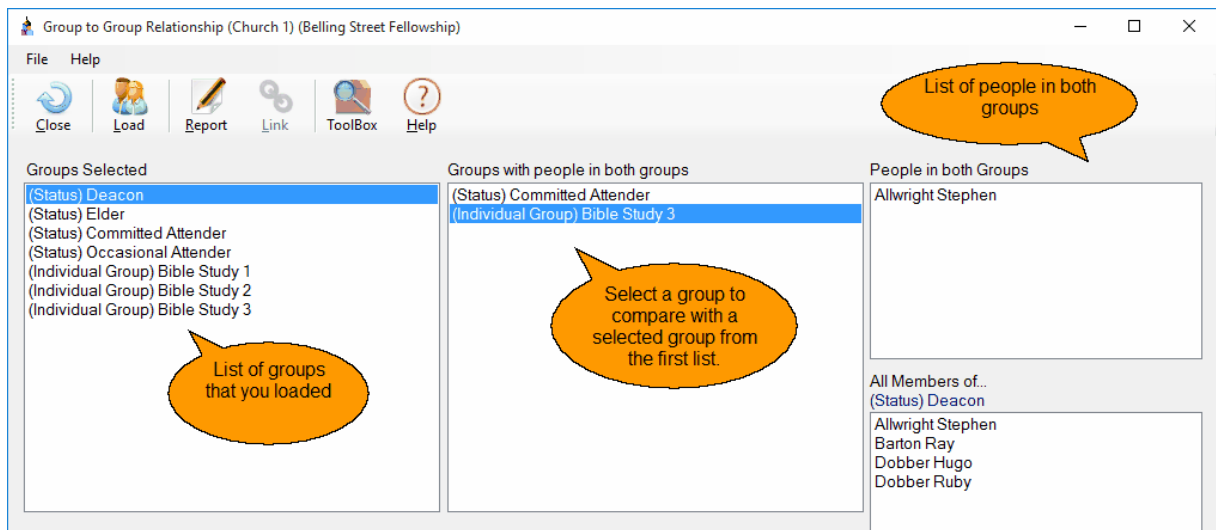
Group Type	Group Name
Status	Occasional Attender
Individual Group	Home Group 1
Individual Group	Aerobics Outreach
Individual Group	Ladies Home Group 2
Individual Group	Property Maintenance
Individual Group	Youth Group 1
Individual Group	Bible Study 3
Individual Date	Membership
Individual Date	Baptised
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)

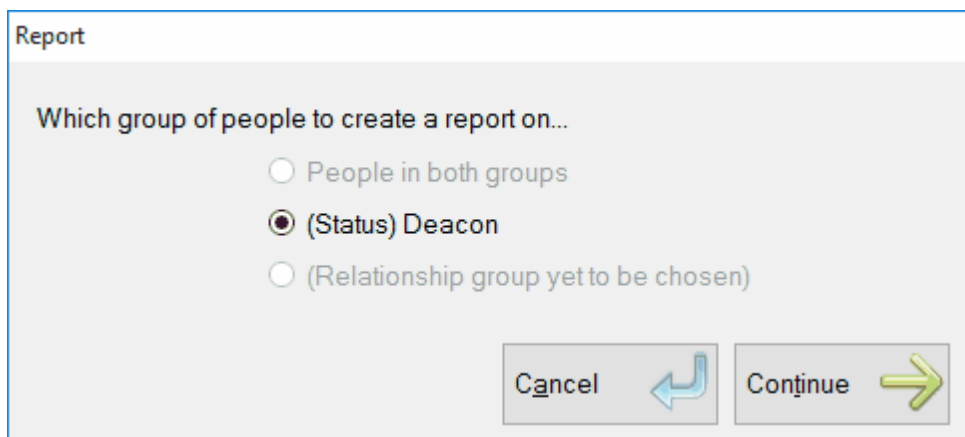


## Report

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.

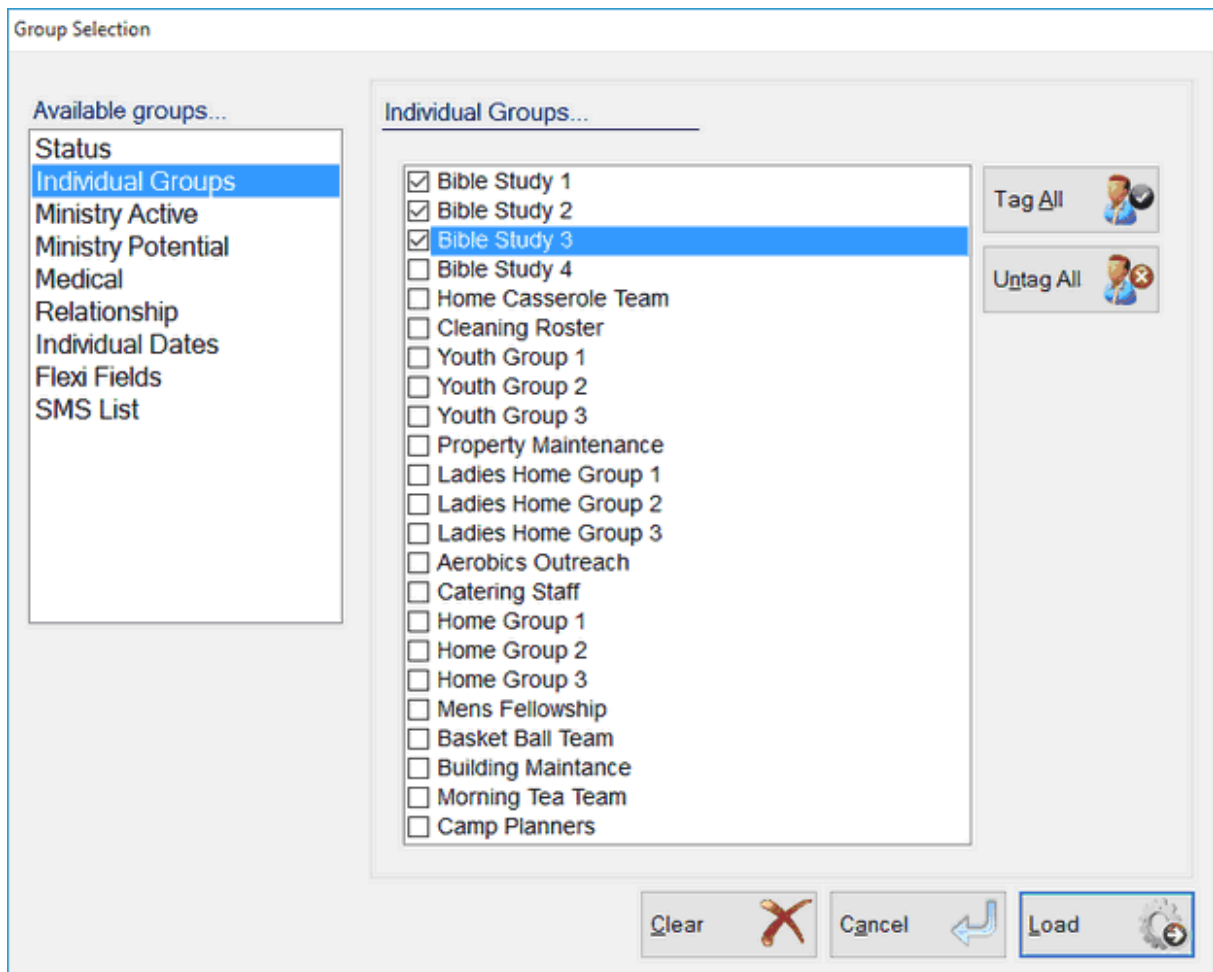


The actual report output depends on the report you select. This area does not have its own report format, rather the people found in the search can be outputted to any standard Pastoral Care report, or any Custom Report designed by yourself.

## 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.

This is shown by pressing load from the toolbar.



## Portrait Manager

New to Pastoral Care 14 is the integration of Web Cam technology to make managing the portraits of families and individuals much easier.

The following areas can use the new integrated Web Cam feature for capturing photos.

Explore Tab - Portrait Manager

[Class Room Manager](#)

Family File - [Portrait](#)

To get started on the Portrait Manager, simply press LOAD on the toolbar to load in all people, or use [filters](#) to load in a select group of people.



Click on each area of the Portrait Manager learn more.

(This sample screen has been shown below after pressing the Load Button.)

Image	Name
	Family Portrait 1
	Family Portrait 2
	Family Portrait 3
	Stephen
	Marion
	Thomas
	Mandy

### Portrait Manager Load



Load

Press the Load button to load in all people into the Portrait Manager. If you have selected any [filters](#), the load button will only load in people who match the selected filter.

### Portrait Manager Filters



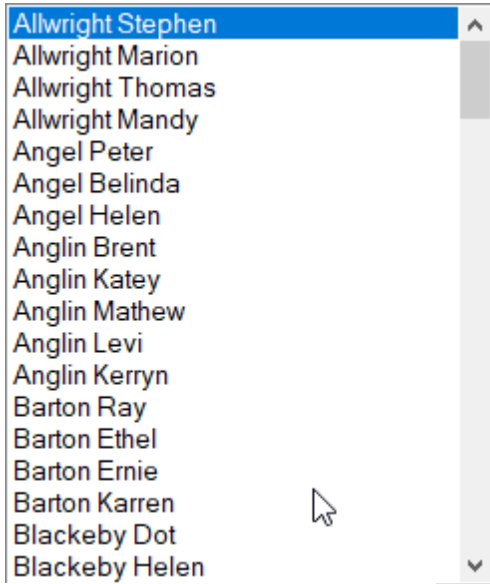
Filters

Press the Filters button to set a filter that limits how many people are loaded into the Portrait Manager. This is perfect if you want to work on a smaller group of families / individuals.

## Portrait Manager List

The List of people shown after pressing load is the list of people your filter or load has returned.

To view or change or add images to the selected family / individual, simply select them from the list and start making changes..







## Portrait Manager - Portrait Type

Once a person has been selected from the [Portrait Manager List](#), you will see a list of available portrait slots. These are standard for every family.

There are 3 family portrait slots, and one each for each family member.

In the sample below, you can see that Family Portrait 1 is used, Family Portrait 2 and 3 are yet to be used, Stephen, Thomas and Mandy have photo's and Marion has not had a photo added to her name yet.

To add an image, simply select the slot, and use the [Portrait Manager Edit Images](#) options to either add an image, or change one.

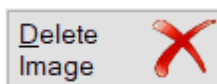
Image	Name
	Family Portrait 1
	Family Portrait 2
	Family Portrait 3
	Stephen
	Marion
	Thomas
	Mandy

### Portrait Manager Edit Images

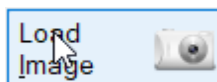
You can choose here to Delete an Image, or Change / Load an image via the Image Editor, or the WebCam feature.

Add/Change Image Via...

Image Editor
  WebCam



Press this to permanently delete the currently selected and previewed image.



Press this to load an image with either the Image Editor, this is the same as the [Family Portrait Screen](#), or the WebCam feature.



### Portrait Manager Image Preview

The image preview section shows what the image looks like.

Family Portrait 1



# **Chapter**

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**9**

***Utilities Tab***

## Utilities Tab

### 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.

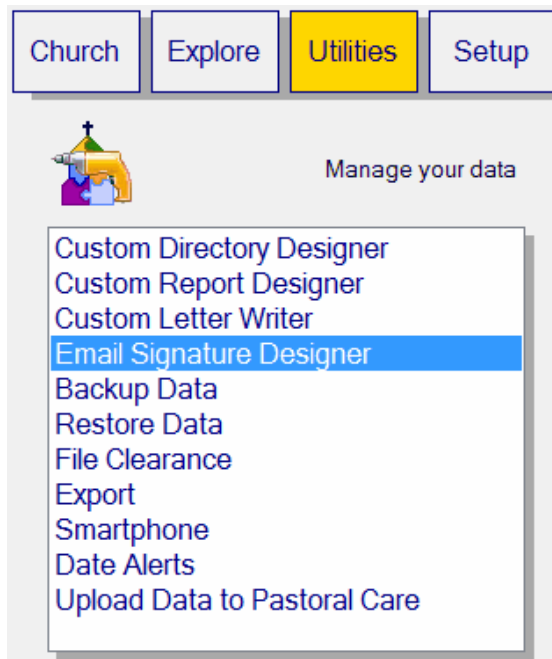


Click on each Utilities menu item shown right to find out more about each area.

See also:

[Why Use Custom Report Utilities?](#)

[Managing Custom Reports](#)



## 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

This simplified version of the powerful [Custom Report Designer](#) makes 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	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.
<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		

---

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

<p style="font-size: small;">Available 'Church Directories'</p> <div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div>	<p style="font-size: small;">Templates</p> <div style="border: 1px solid #ccc; padding: 5px; font-size: small;">           Directory_Personal_Compact            Directory_Personal_Details            Directory_Personal_Portrait            Personal_And_Portrait         </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">           Help  </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">           Cancel  </div> <div style="border: 1px solid #ccc; padding: 5px;">           Create  </div>
--	--	--

### 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 suits 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**

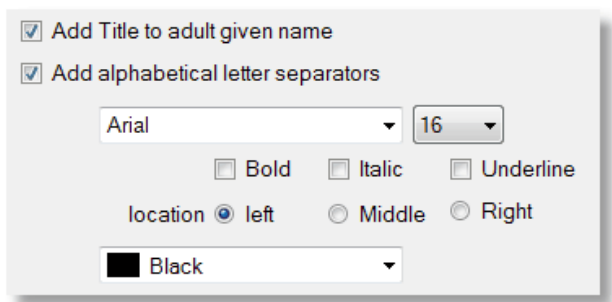
**Properties**



<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

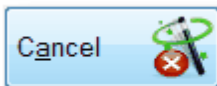
Tick the Load an Existing Church Directory to be able to select a Directory you have already designed, or a Template that has been distributed via Pastoral Care Software.

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

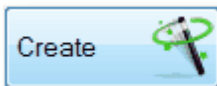
Available 'Church Directories'	Templates
Sample Full sample	

### Cancel



Press Cancel to stop using the Create Custom Directory starter window.

### Create



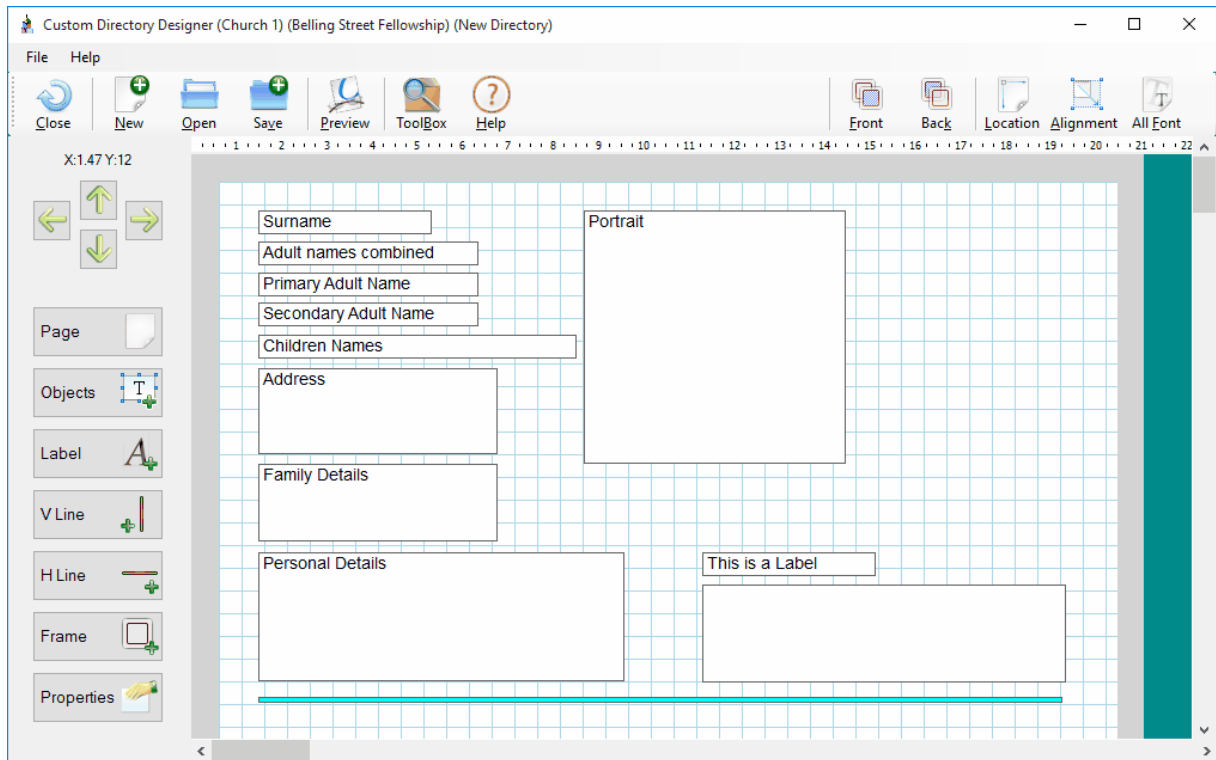
Press Create to create a Custom Church Directory based on the [Objects](#) you have selected to include on that directory.

## 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.

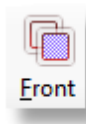


## Toolbar

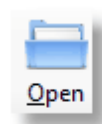
Shown below are each of the Toolbar buttons for the Custom Directory Designer.



Press New to start creating a new Custom Directory from scratch.



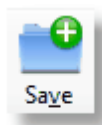
Bring the selected object in front of all other objects.



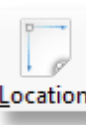
Press Open to select an already created Custom Directory to open for modification.



Send the selected object behind all other objects.

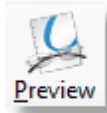


Press Save to save your Custom Directory. Saving makes your changes permanent, and makes your

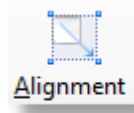


Use [Location](#) to fine tune the size and position of the selected object.

template available in all reporting areas of Pastoral Care.



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](#)

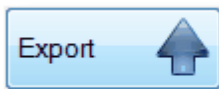


Use [All Font](#) to set the font on all objects to be the same font.

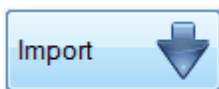
## Open



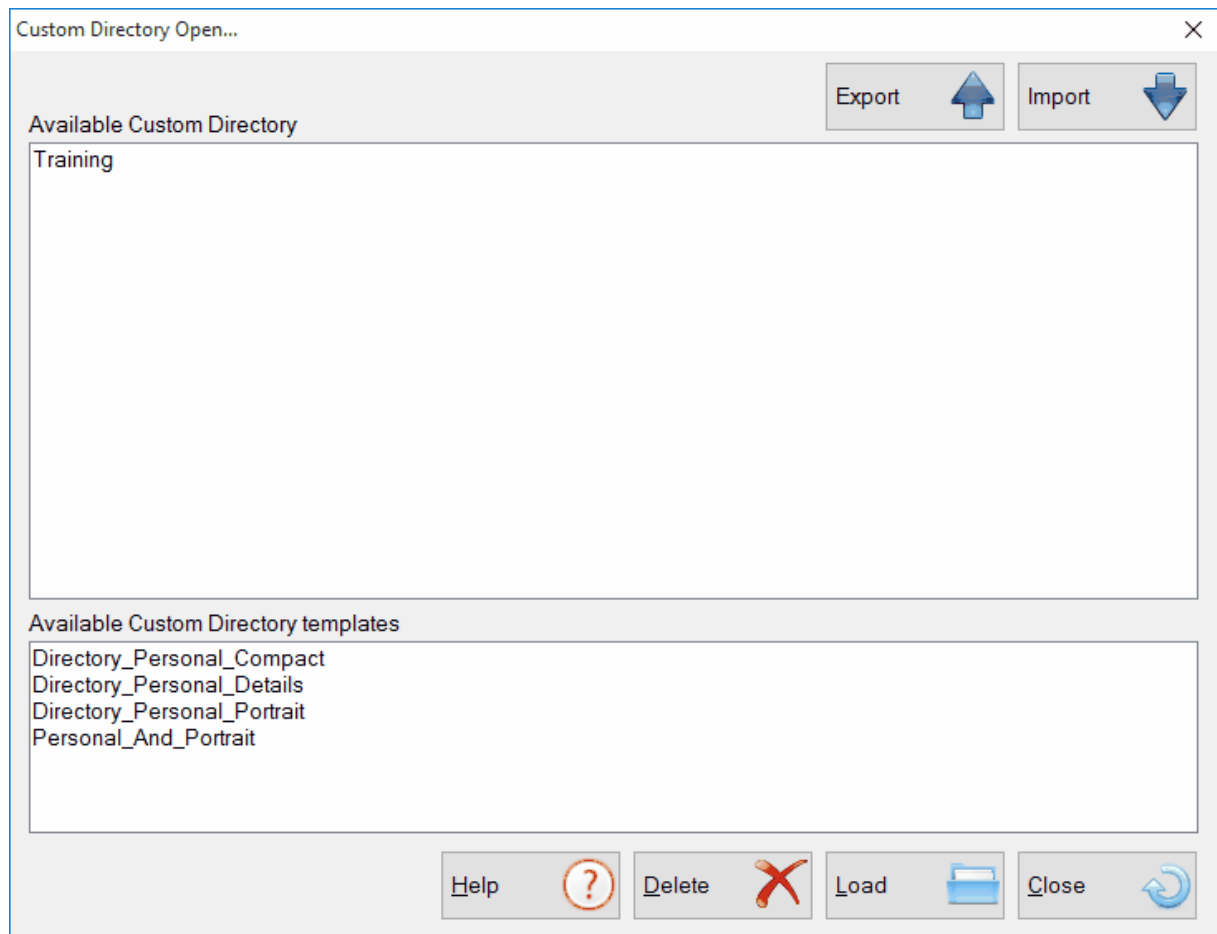
Press the Open Icon on the toolbar to select an already designed Custom Directory for editing.



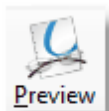
Use the Export Button to create a file that another church can IMPORT for use in their Custom Directory area.



Use the Import Button to import a Custom Directory designed by someone else.



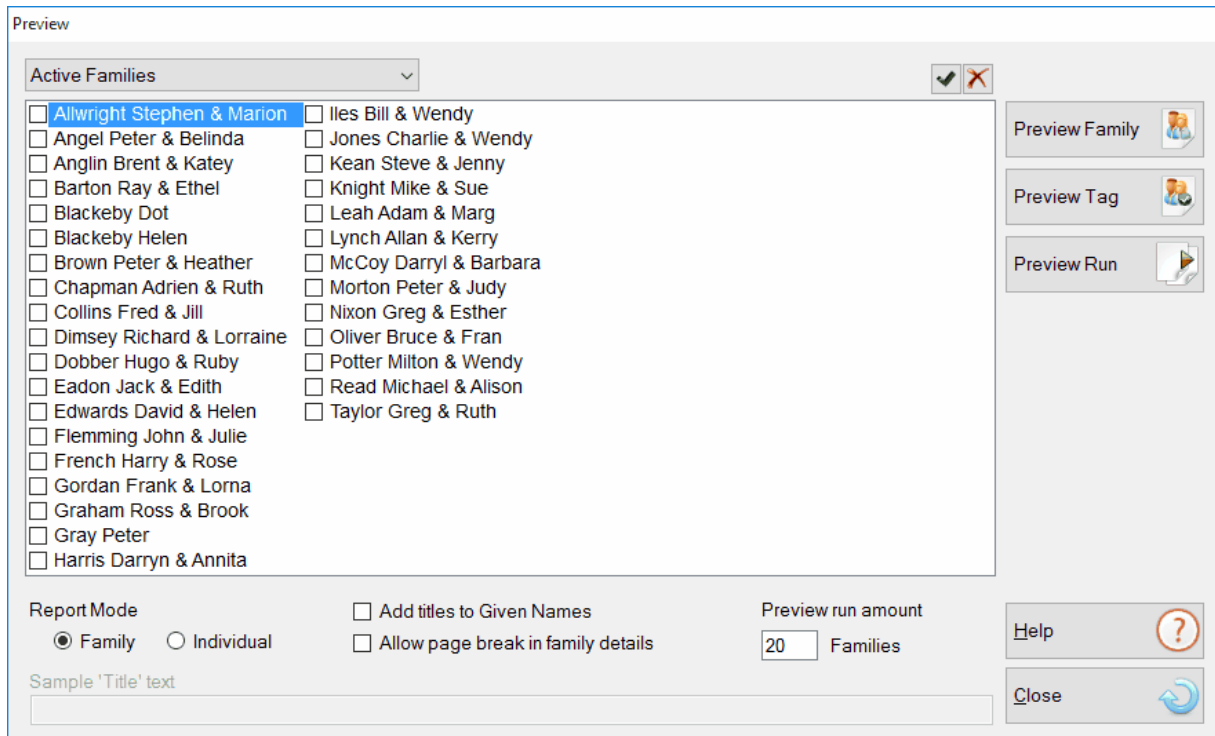
## Preview



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.

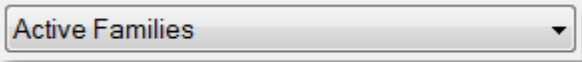


Click on each part of the Preview Window below to learn more about this feature.



**Family Filter**

Select a Family Filter for running your preview on. For most people, Active Families as the default is perfect for this job!



**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.



### 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 Family 

### Preview Tag

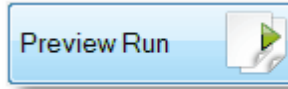
Pressing this button will only run the selected report template on the currently tagged (not highlighted) families.

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.



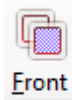
### Tag - Untag All



Use the Tag all and Untag all buttons to select or de-select all people in the list

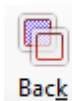
### Front

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.

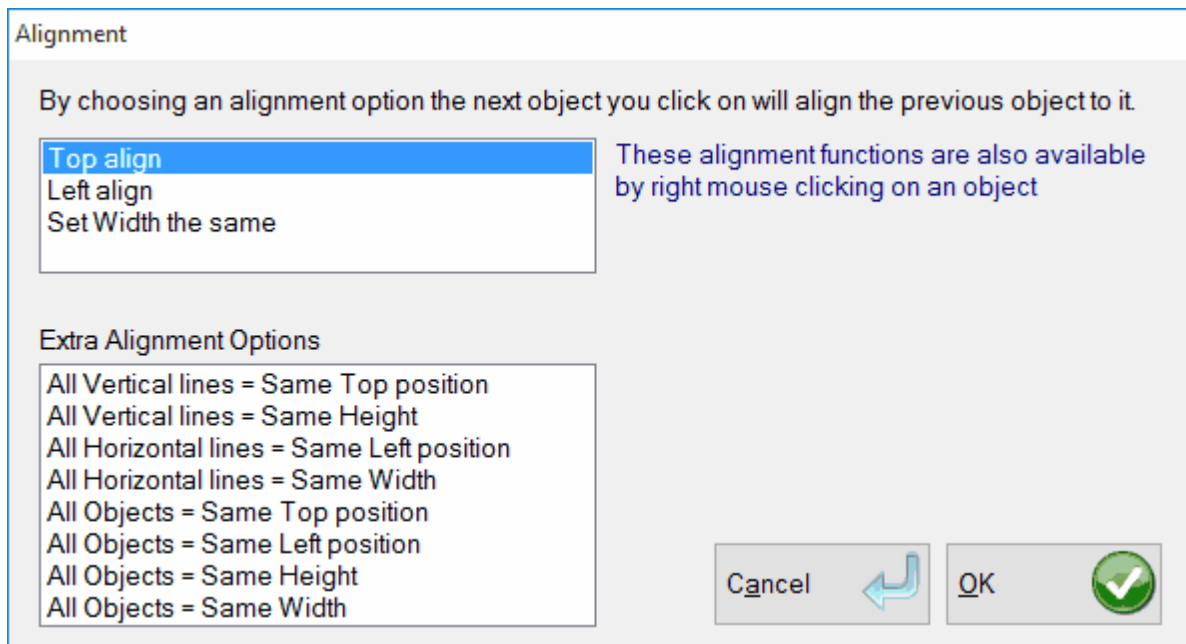
 A dialog box titled "Object Location and Size" with a close button (X) in the top right corner. It contains four input fields for numerical values: "Left Position (X)" with value 3.48, "Width" with value 3.84, "Top Position (Y)" with value 4.09, and "Height" with value 0.53. Each input field is followed by the unit "cm". At the bottom, there are two buttons: "Cancel" with a left-pointing arrow icon and "Close" with a right-pointing 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!

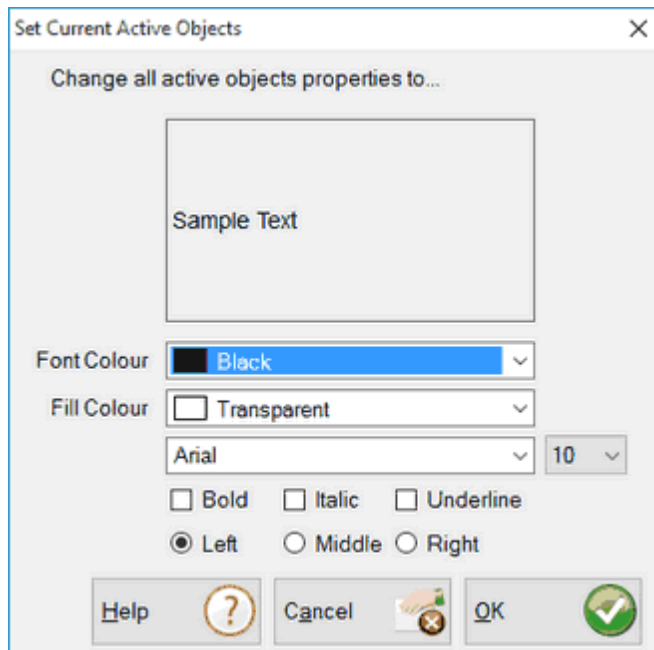
The first four options on this window are also available by Right Clicking on an object on the design area of the Custom Directory Designer.

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

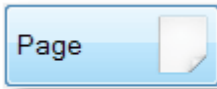
Use the 4 nudge buttons to push the currently selected object in the direction of the arrow you are pressing.

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.

**Page Properties**

<b>Paper size</b> <input checked="" type="radio"/> A4 Portrait <input type="radio"/> A4 Landscape <input type="checkbox"/> Mirror Margins	<b>Columns</b> 1	<b>Margins</b> Left 0.6 cm Top 0.6 cm Right 0.6 cm Bottom 0.6 cm Gutter 0 cm	
--	---------------------	---	--

---

Add Title to given name  
 Allow Page Break if all the family details don't fit on the page  
 Force page break  
 After a record     After alphabetical change  
 Suppress page numbering  
 Alternate Right / Left  
 Add alphabetical letter separators

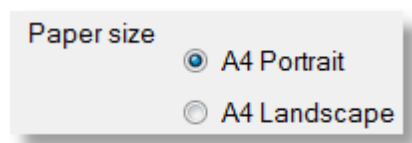
Arial    16     Bold     Italic     Underline  
 location  left     Middle     Right  
 Black

---

**Work area grid**     Lines     Dots     None    Spacing 0.50 cm  
 Activate Alignment Bars with Snap to

## 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.



## 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.

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

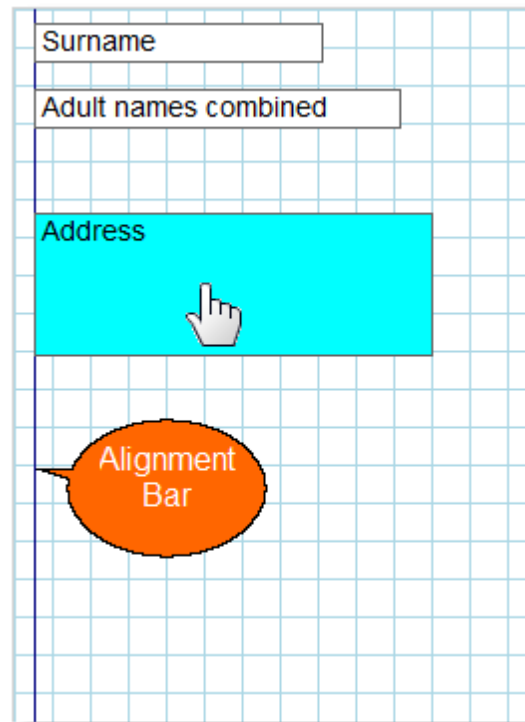
Work area grid  Lines  Dots  None Spacing  cm

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.



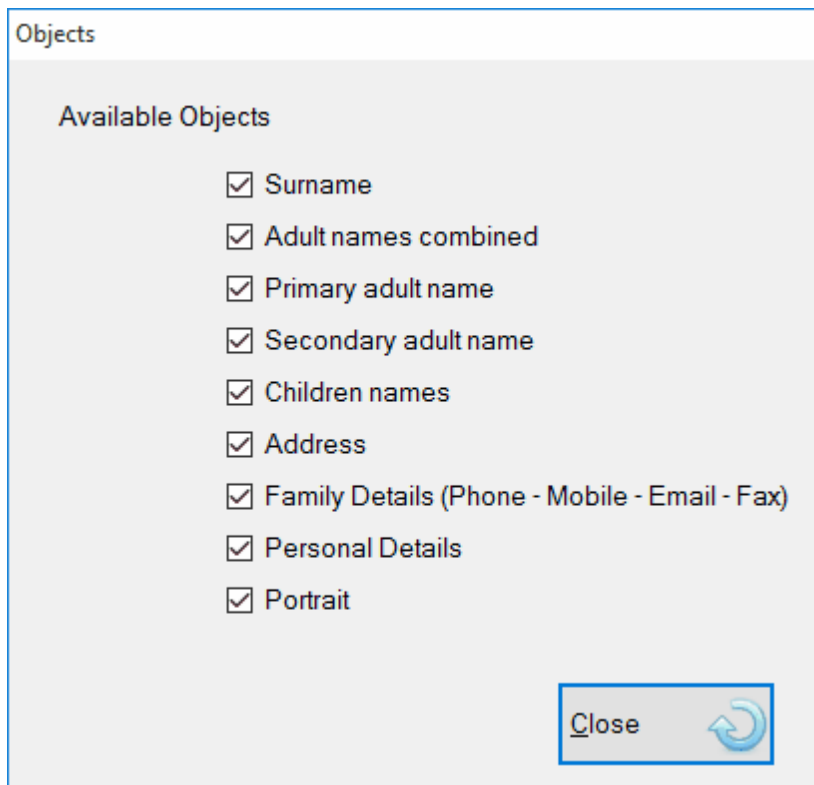
## Objects

The Objects window allows you to select the data objects that you want to include on your Directory.



Click on each one below to learn more about each object and its 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 individual's 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 FamilyDetails 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.

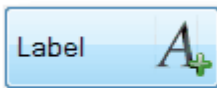
## Portrait

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)

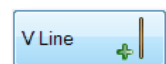
## Hide Label Option

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.

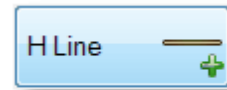
Double clicking on a line will open the [Line Properties](#) window.



## 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.

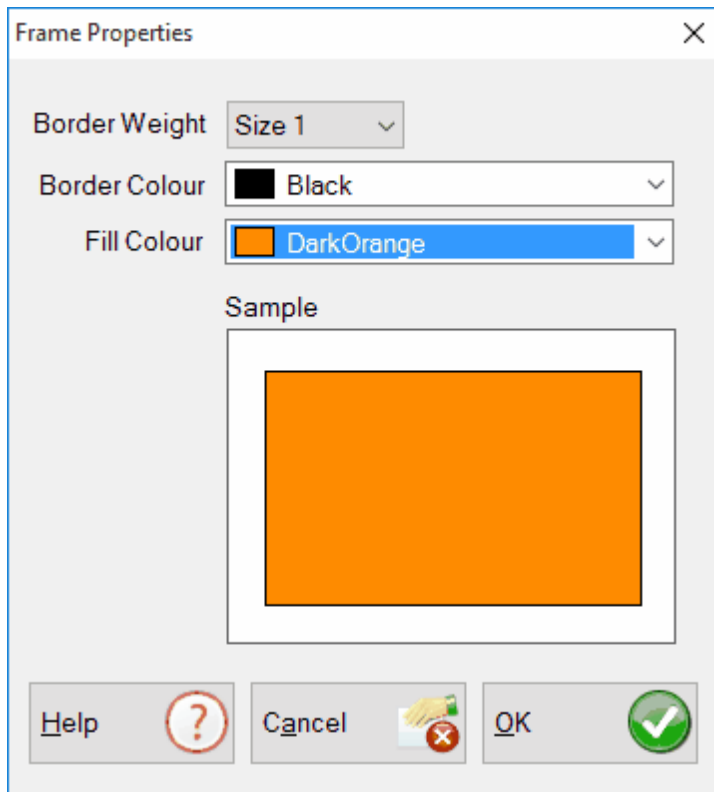
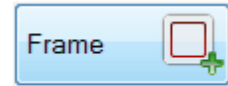
Double clicking on a line will open the [Line Properties](#) window.



## Frame

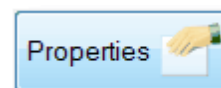
The Frame Object is simply a Rectangle that you can use to provide highlighting or boxing of a section. This object cannot auto grow, so you need to consider how information will display alongside or on top of this object.

You can set Border Size and Colour, and Fill Colour for the Frame Object.



## Properties

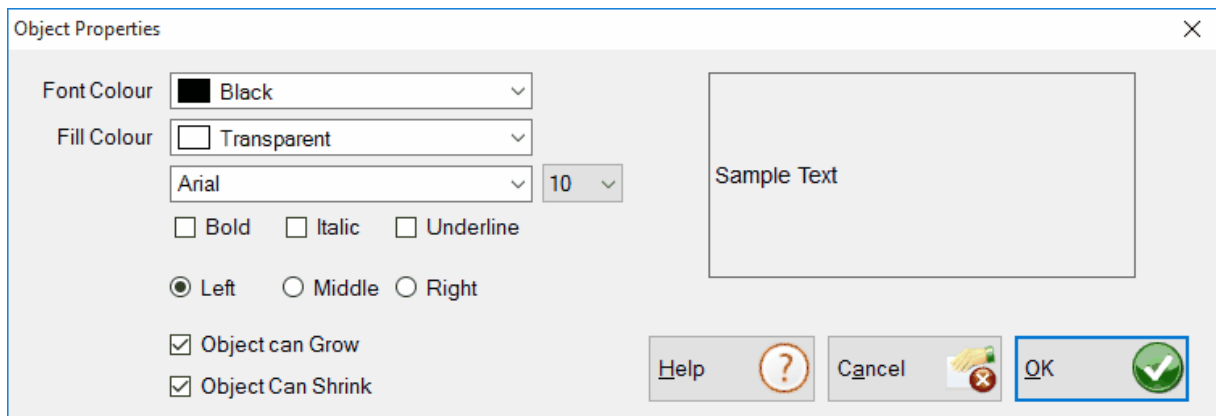
This section shows all Property windows for Custom Directory and Custom Report objects. To open a properties option window for any object, select that object and press the Properties Button, or double click on the object that you want to see the properties window for.



### 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 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.

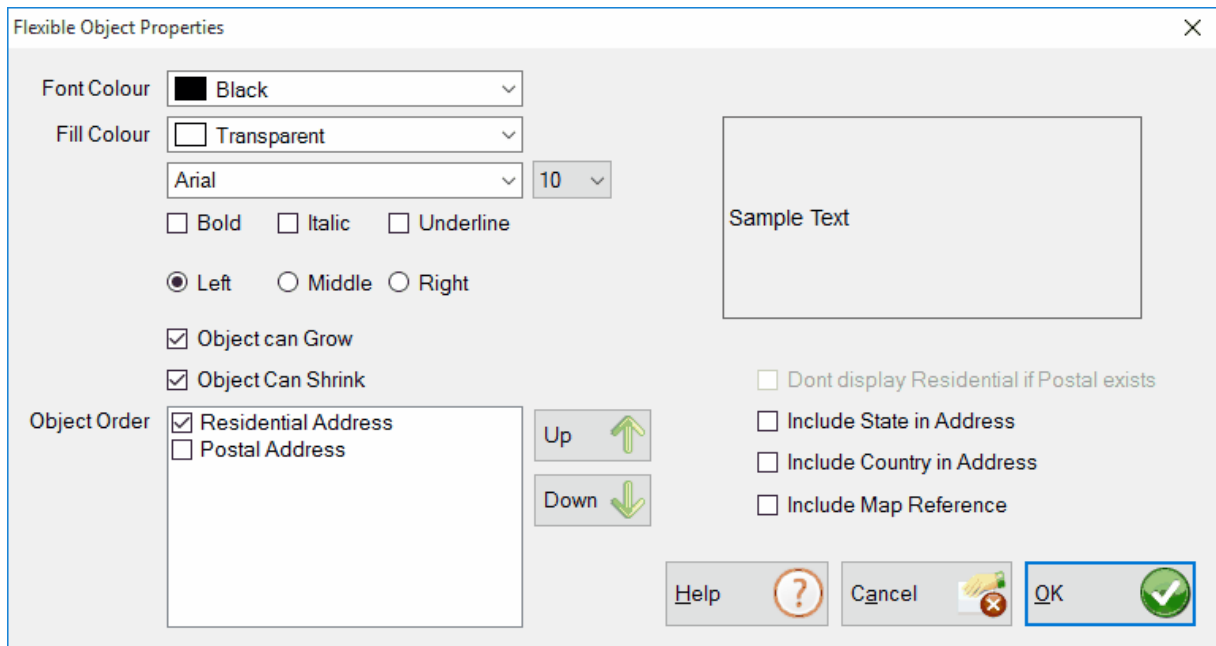
## Children's Names

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.

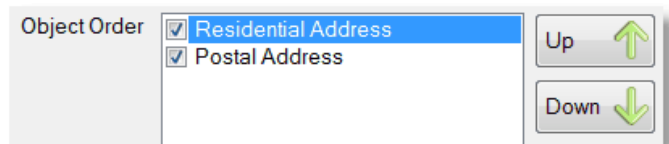
## Automatic Sizing Features

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.

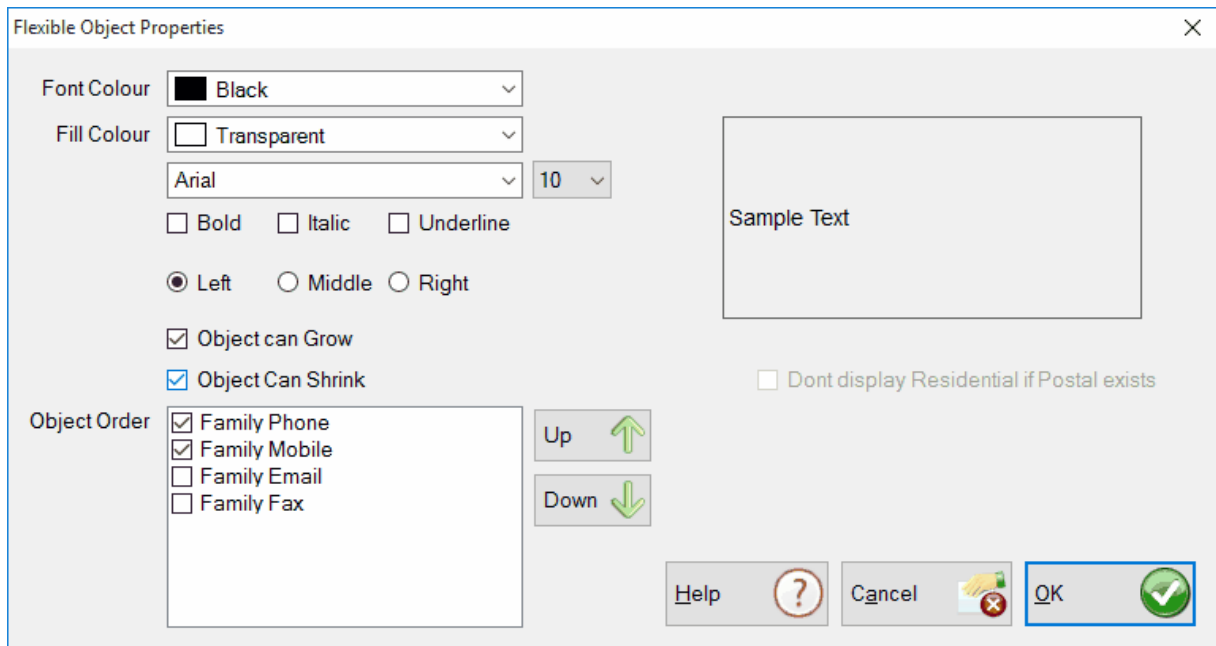


## Don't Display Residential...

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.

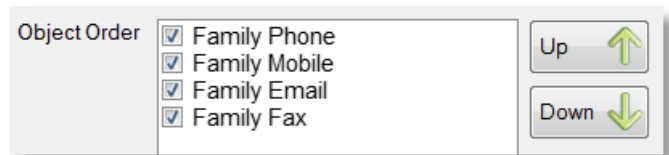
## Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size 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

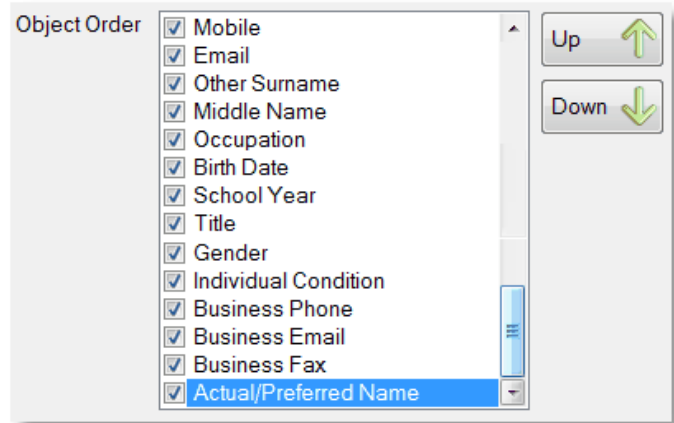
Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

## 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.

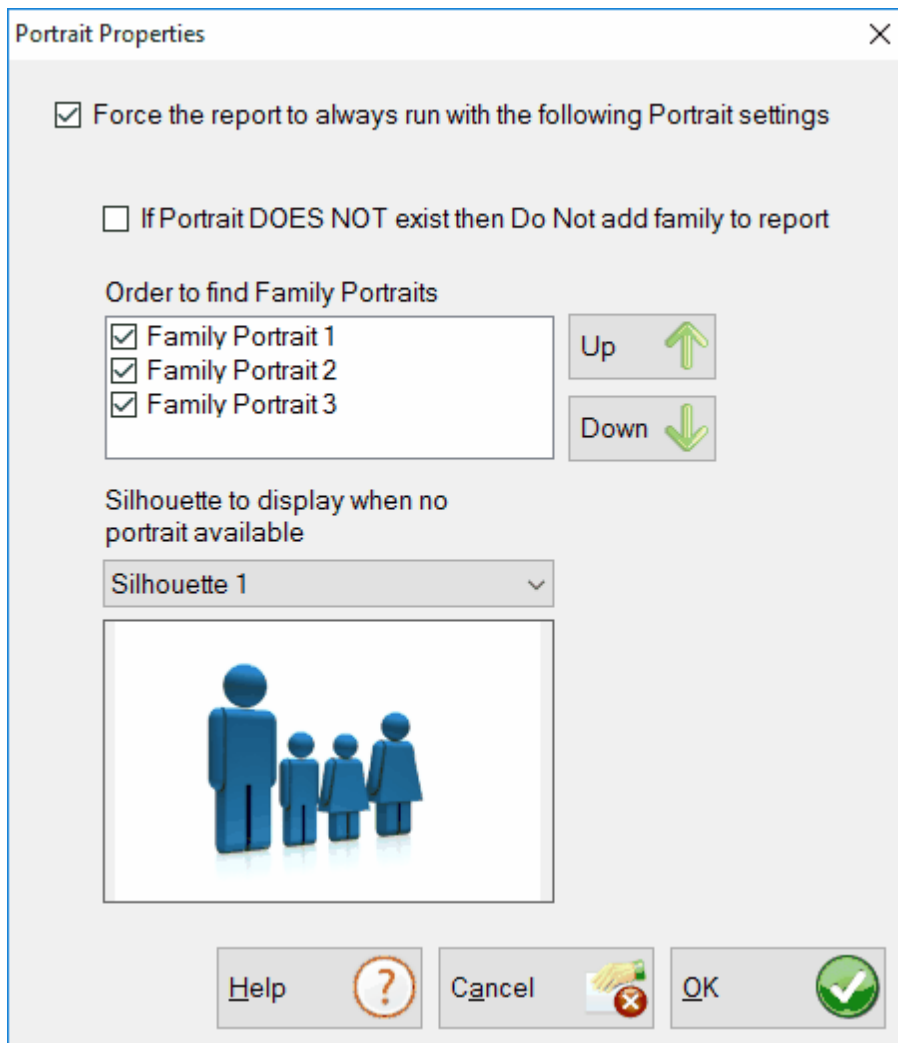
## Portrait Object Properties

The Portrait Object properties window (shown below) allows you to either let Pastoral Care manage the portrait selection automatically (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.





### 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.

Force the report to always run with these 'Portrait' settings

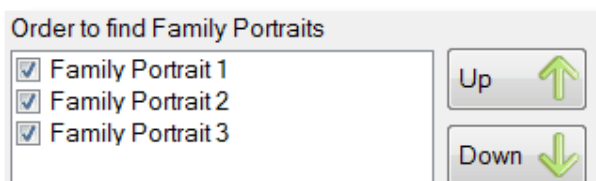
### Do Not Add Family Option

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

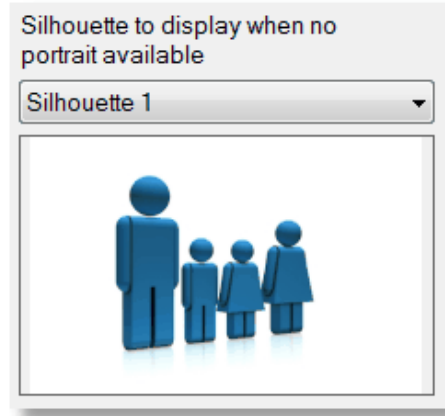
Manually adjust the Portrait Search Order for the current Directory or Report design. Having a Tick on a portrait item identifies to Pastoral Care that you want to use that Portrait in the output. In the example above, when composing this object,



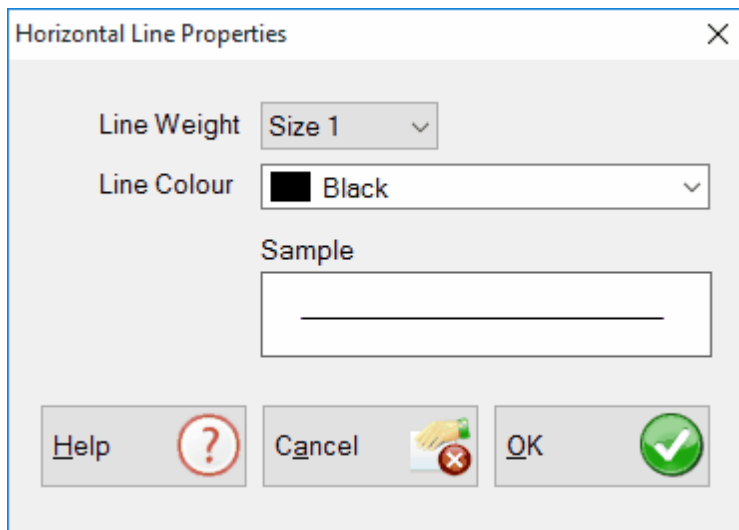
Pastoral Care will first look for a portrait for the current family in Portrait Save Position 1, if one exists, it will use it, if not it will continue looking in Save Position 2, then 3 until it finds a portrait.

### 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.



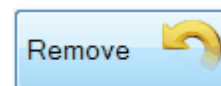
### Line Properties



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.

Surname	Family Details
Adult names combined	Address
Children Names	
Personal Details	

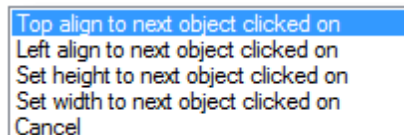
This template produces a report that looks like this:

<p><b>Allwright</b> Stephen &amp; Marion</p> <p><b>Stephen</b> Birth Date:03/07/1945 Mobile Phone:0400297025 Email:stephen@spirit.com.au Occupation:Plumber</p> <p><b>Marion</b> Birth Date:05/07/1946 Mobile Phone:041234567890 Occupation:Doctor</p>	<p><b>Ph:054-33-5478</b></p> <p>11 BLACKDOG ROAD Riddells Creek 3412 VIC</p>
<p><b>Angel</b> Peter &amp; Belinda</p> <p><b>Helen</b></p> <p><b>Peter</b> Birth Date:02/06/1965 Mobile Phone:041234567890 Occupation:Retired</p> <p><b>Belinda</b> Birth Date:04/05/1967 Mobile Phone:041234567890</p> <p><b>Helen</b> Birth Date:05/08/2001</p>	<p><b>Ph:054-22-1199</b></p> <p>12 WATER WAY CRT Gisborne 3444 VIC</p>

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.

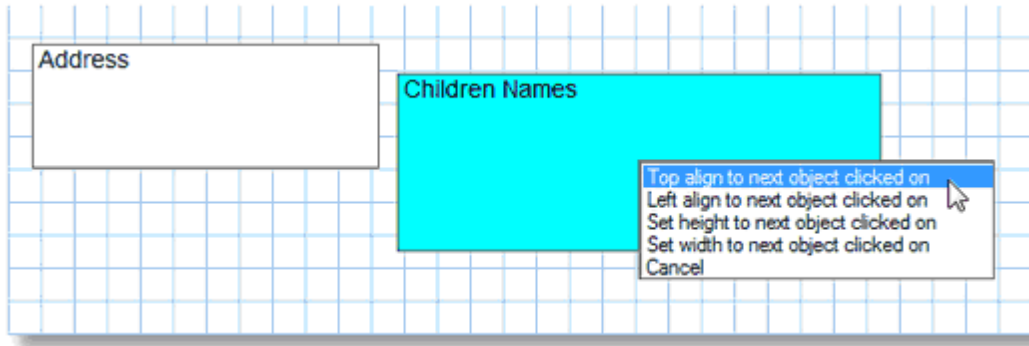
## Right Click

If you Right Click while your mouse pointer is over an object, the following pop up menu opens up.

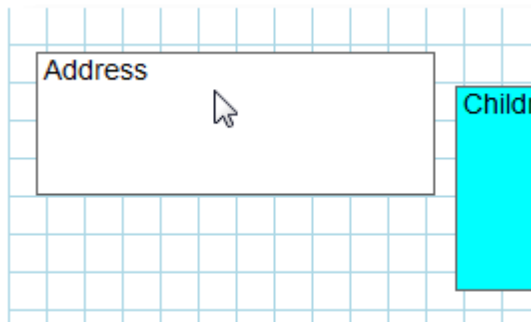


Each action described here will occur to the object that you right clicked on, in relation to the NEXT object you click. For example, if you now selected the first menu item of "Top Align to next object clicked on" and then you clicked on the address box, your Selected Object would move vertically only until the top of the selected box was in line with the top of the Address Box.

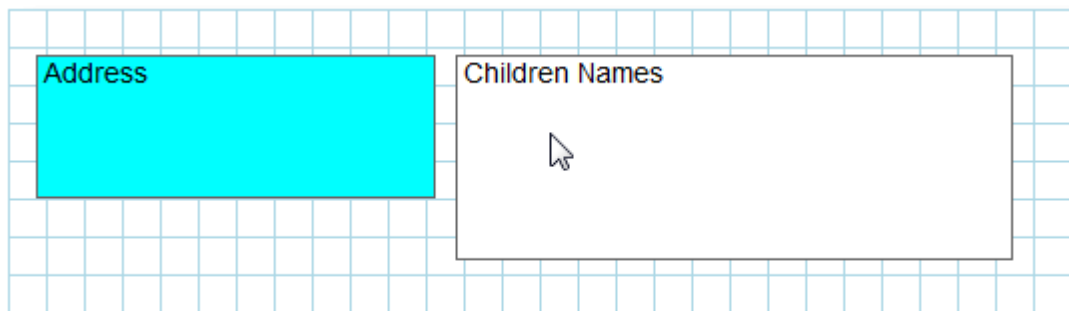
Here is a few visuals to show this. The picture below shows that you have Right Clicked on Children's Names, and you are about to left click on "Top align to next object clicked on"



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 it's 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:

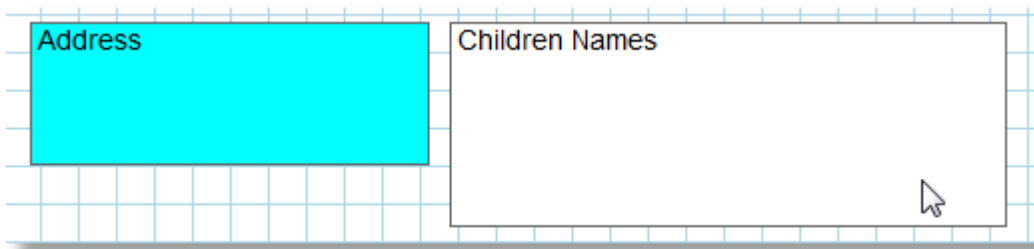
Smith	25 St Helena Drive
	Unit 4

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.



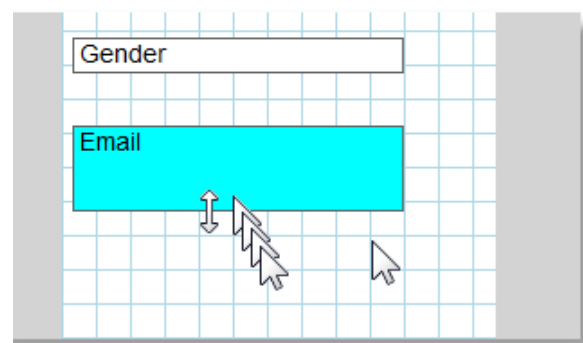
### Sizing Objects

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.

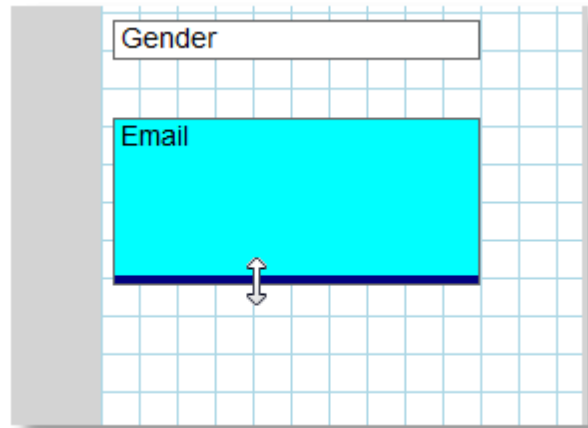
Sizing of an object can be done by using one of 2 methods. Use the mouse to drag an object border, or using the [Right Click](#) menu on an object to change its size relative to another object. See [Right Click](#) for some shortcut sizing and alignment options.

### 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.



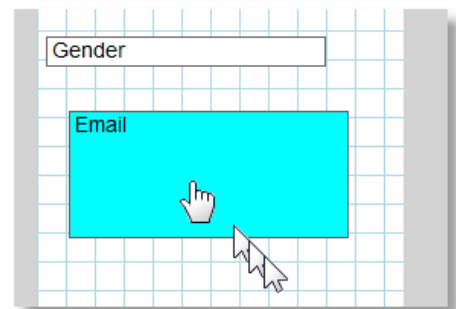
Now the thick blue line has appeared with the double arrow, left click and hold the left mouse button down, and move the mouse in the direction that you want to re-size that edge to.

## Moving Objects

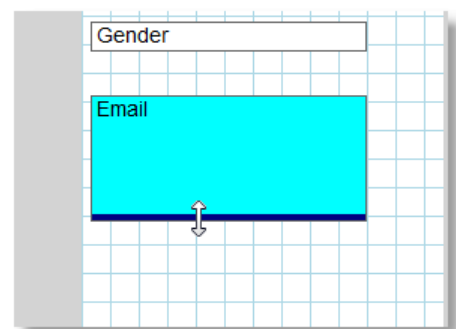
Moving an object can be done by using one of 3 methods. Use the mouse to drag an object, use the [Right Click](#) menu on an object to align it to another object, or use Nudge controls to push an object in small increments. See [Right Click](#) for some shortcut sizing and alignment options.

### 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 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 re size 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, your 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 whats 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 14. 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](#)

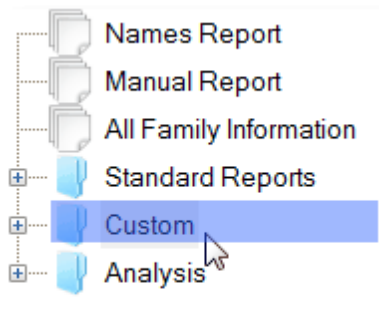
[Introduction to Sub Reports](#)

## How to Use a Custom Report

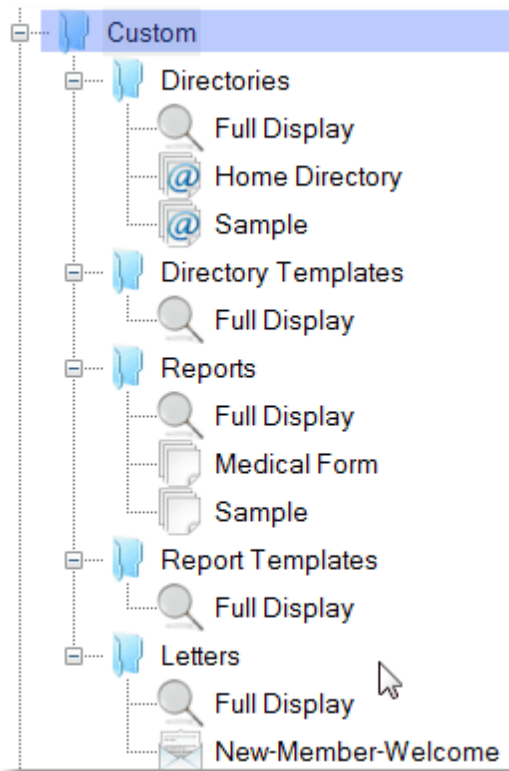
Designing your own reports is one thing, but how do you use them? When you create a Custom Directory, Custom Report or Custom Letter, Pastoral Care adds them to the list of reports available throughout Pastoral Care.

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)

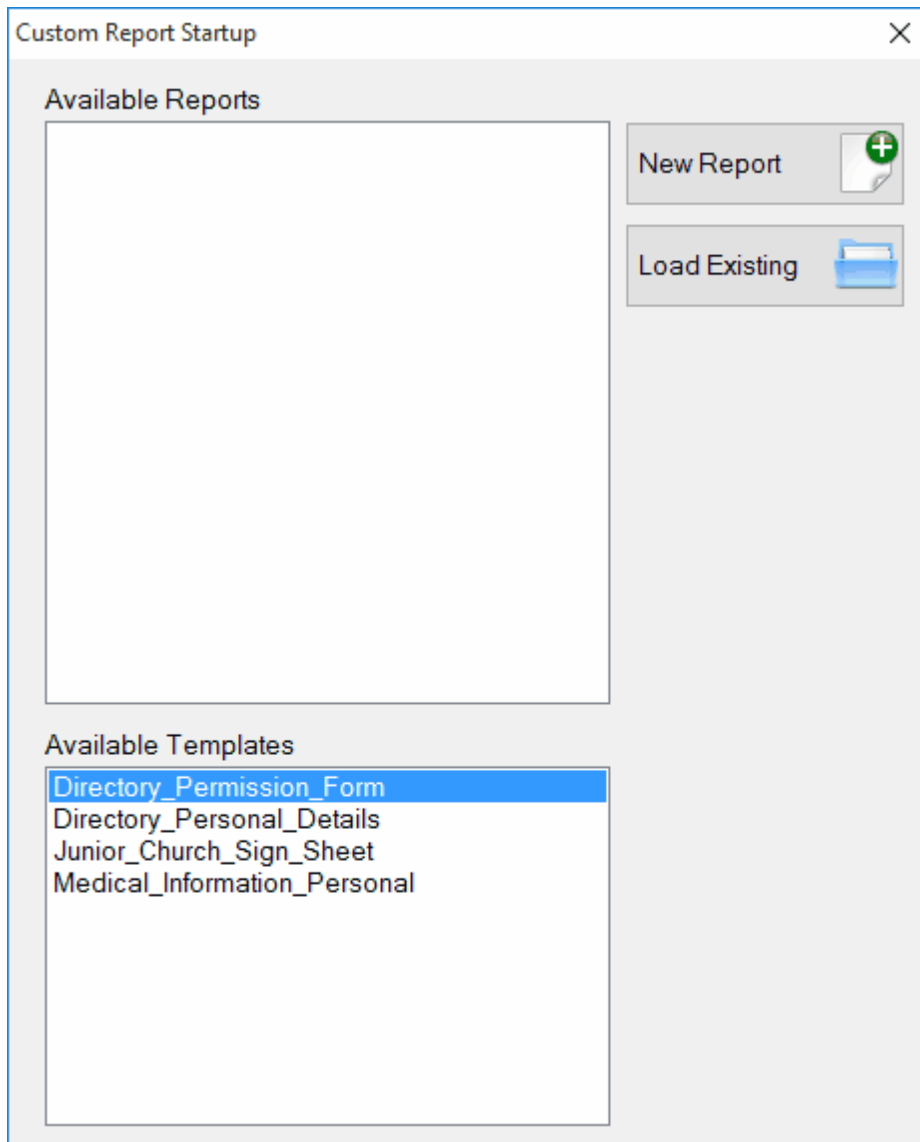


## Starting Custom Report Designer

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.

Objects

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

All finance objects for Custom Reports are only available for custom reports used in the Financial Records area of Pastoral Care.

Help  Close 

## 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

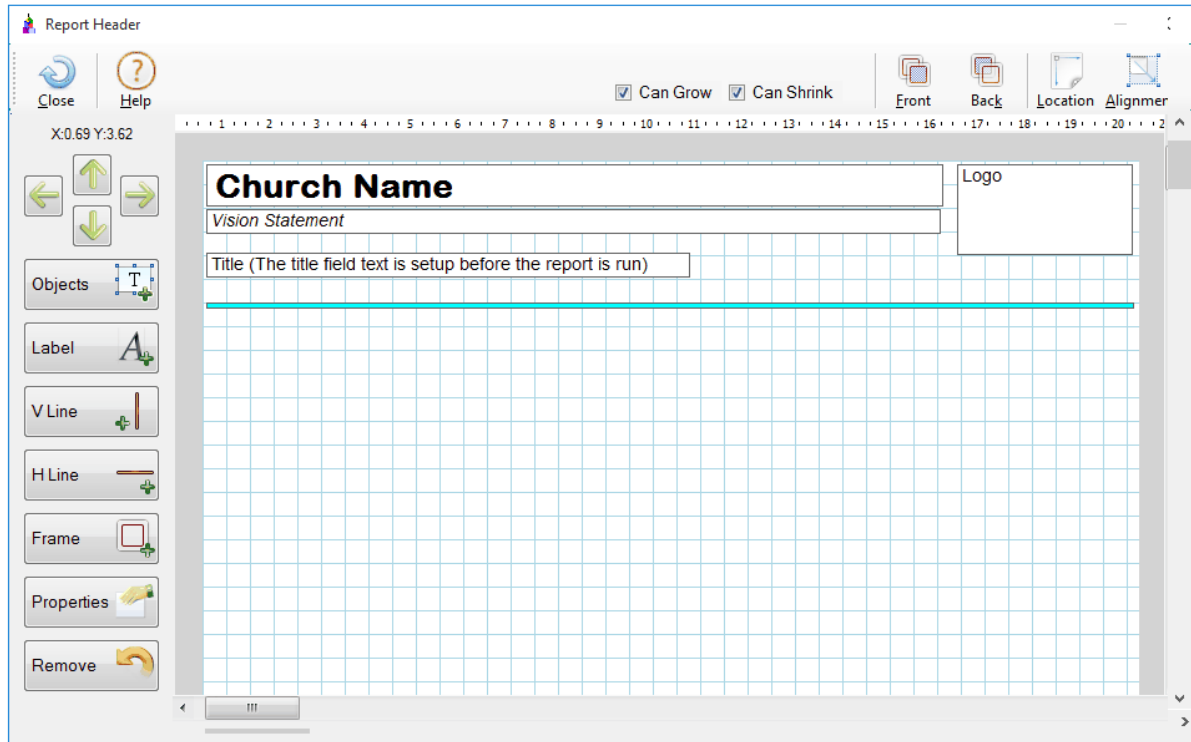
The Report Header object when added to a Custom Report appears at the very top of the design area. It is labeled as Report Header. The words Report Header will not print out on your final design report.

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.

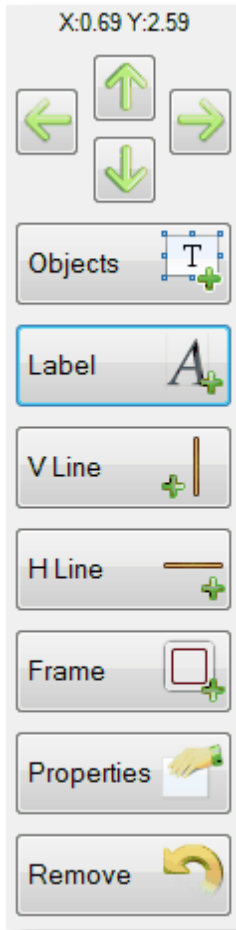


Click on each part of the Report Header Design Window below to learn more.



## 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.

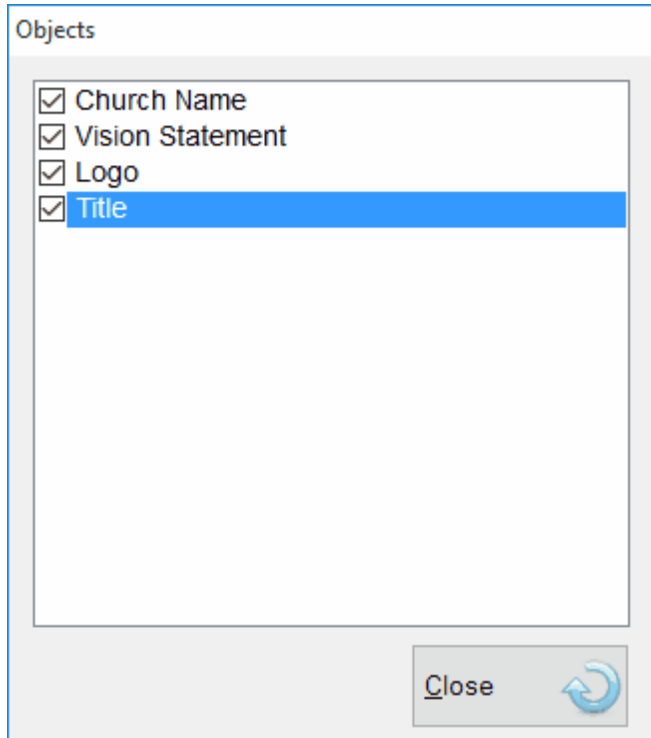


## Objects

The Objects window allows you to select the data objects that you want to include on your Report Header.

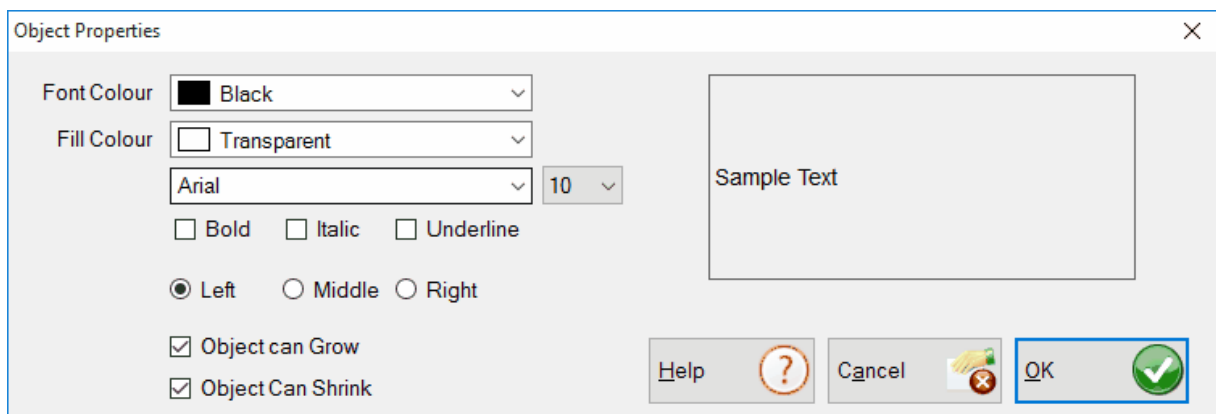


Click on each one below to learn more about each object and its properties.



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.

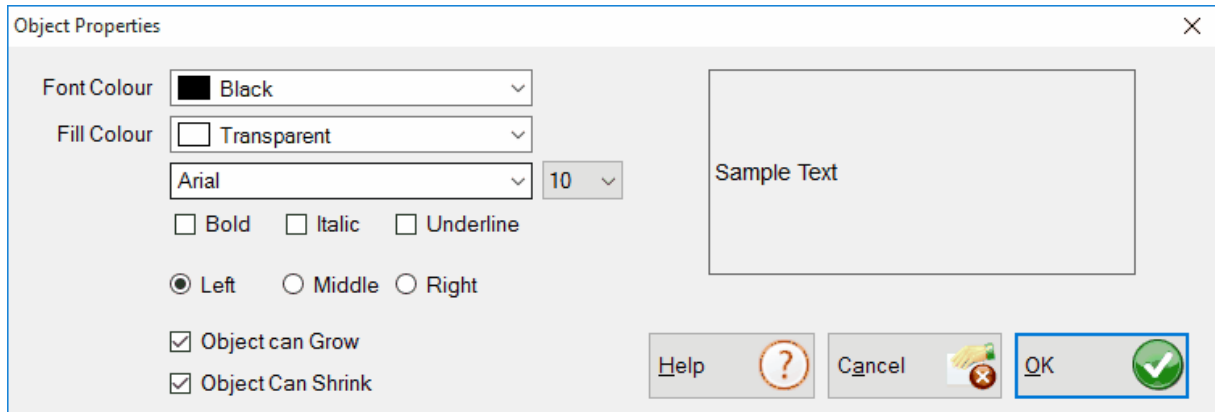


The Vision Statement Object shows the Vision Statement of the church as setup in the [Setup Vision](#) area.

**Double clicking** on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property

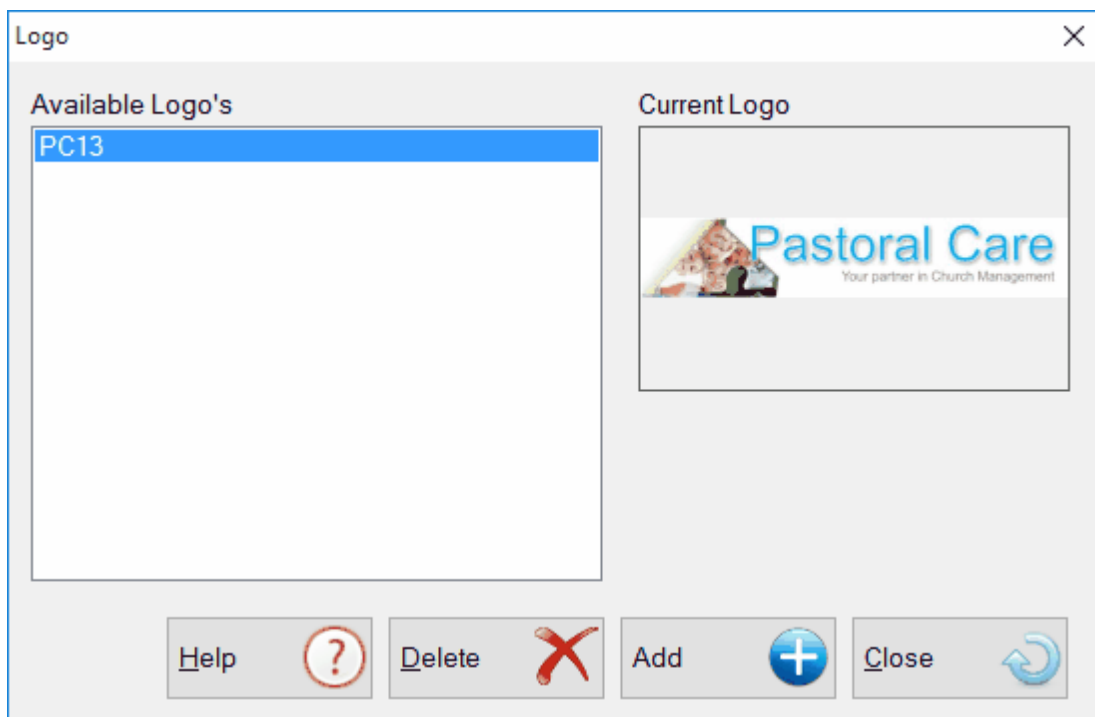


Window for setting fonts, colours, alignment etc.



The Logo Object lets you assign a Logo Image to print out on the report Header.

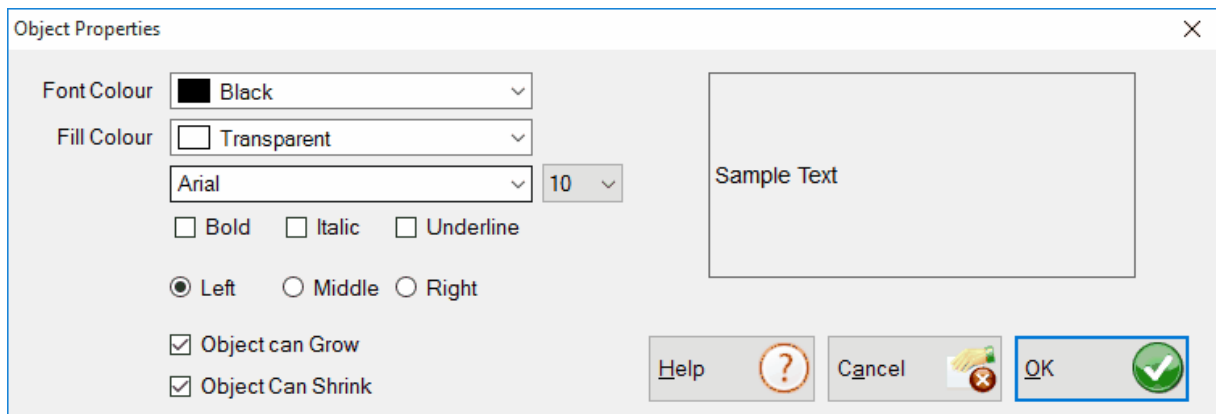
**Double clicking** on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for this object. This is shown below.



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.

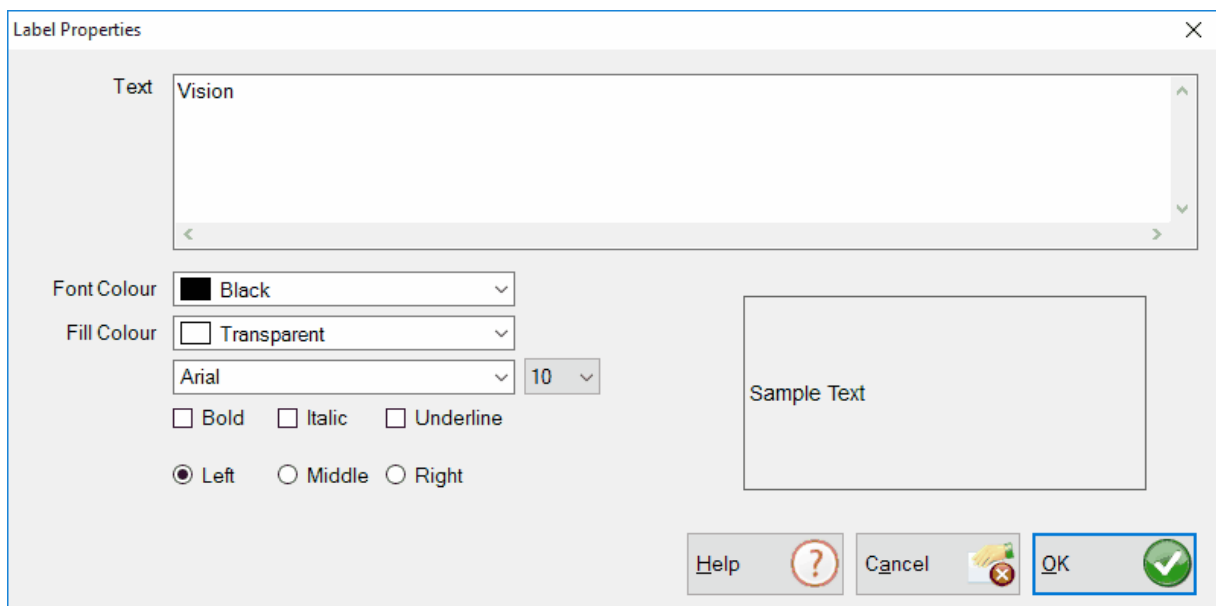
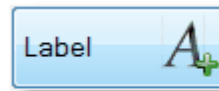
See [Add Logo](#) setup for more details.

The Title field accepts information from the Title Area of reporting. This object will get its data from the [Report Title](#) area. Properties available for this object include all standard colour and font options.



## Label

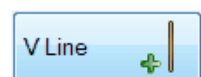
A Label is an object that allows you to simply type in some text and display it on the Report. Selecting Properties on a label opens up the following properties window.



You can Edit the Text for the label here, also set any standard Font property (Type, Colours, Alignment etc)

## V Line

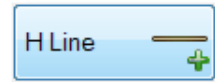
The Vertical Line Object places a Vertical line on the design grid. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line.



Double clicking on a line will open the [Line Properties](#) window.

### H Line

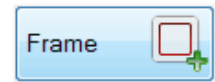
The Horizontal Line Object places a Horizontal line on the design grid. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line.



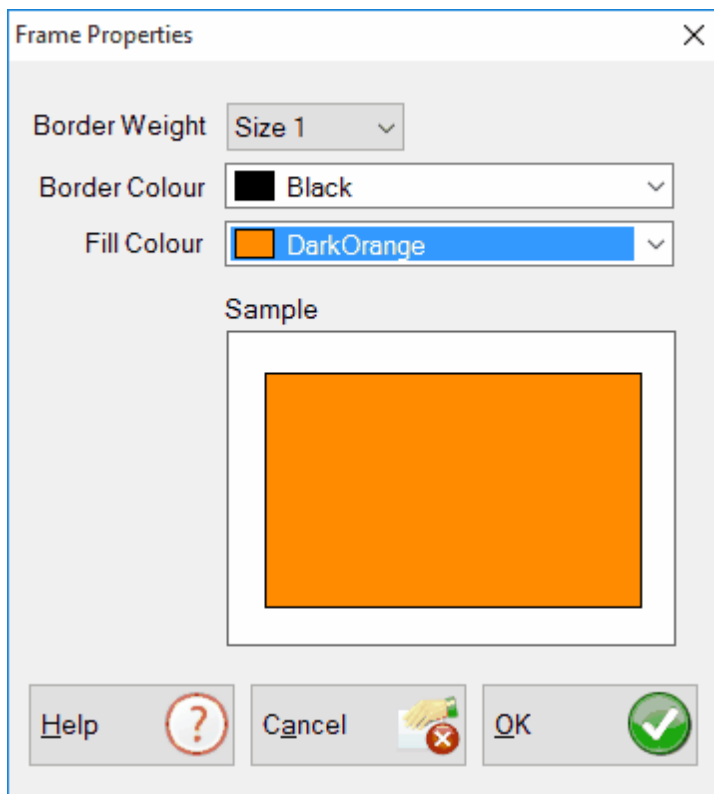
Double clicking on a line will open the [Line Properties](#) window.

### 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.

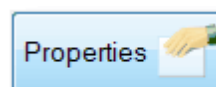


You can set Border Size and Colour, and Fill Colour for the Frame Object.

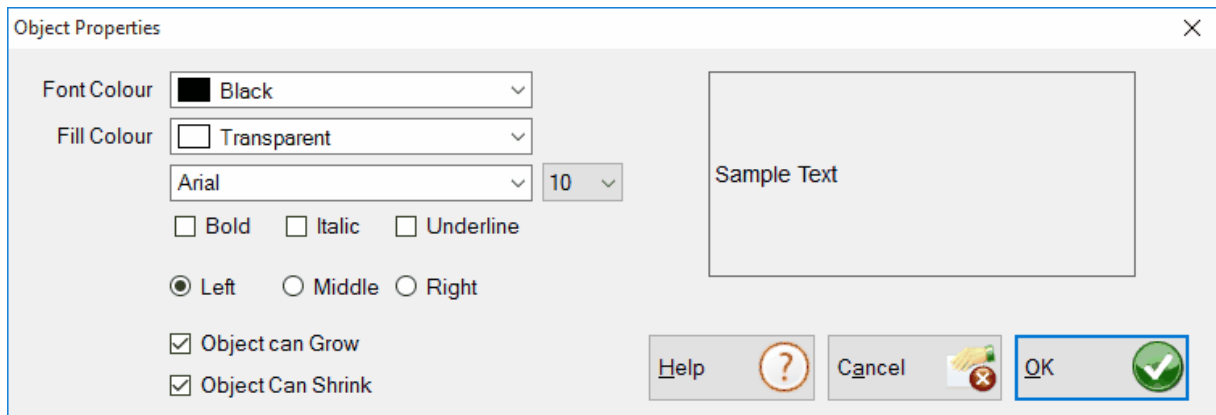


### Properties

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.



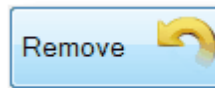
Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

## Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size 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.

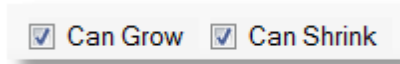
### Remove

Remove the selected object from the design grid. You can also press [Objects](#), and un-tick the object that you want to remove.



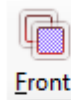
### Auto Size

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.



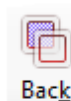
### Front

Bring the currently selected object to the front of the page, this makes this object cover any objects that might be overlapping.



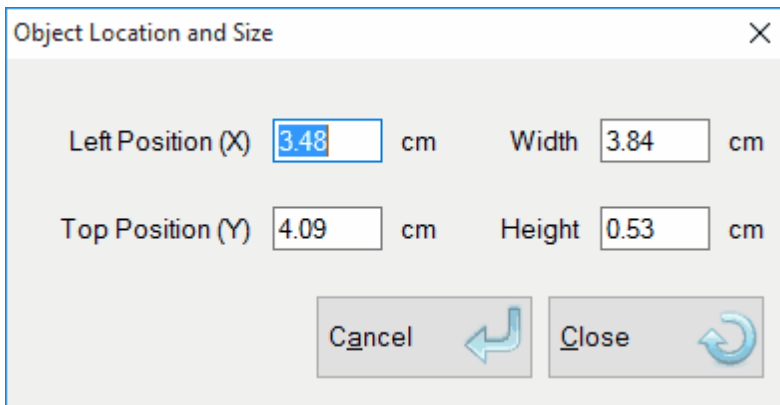
### Back

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.



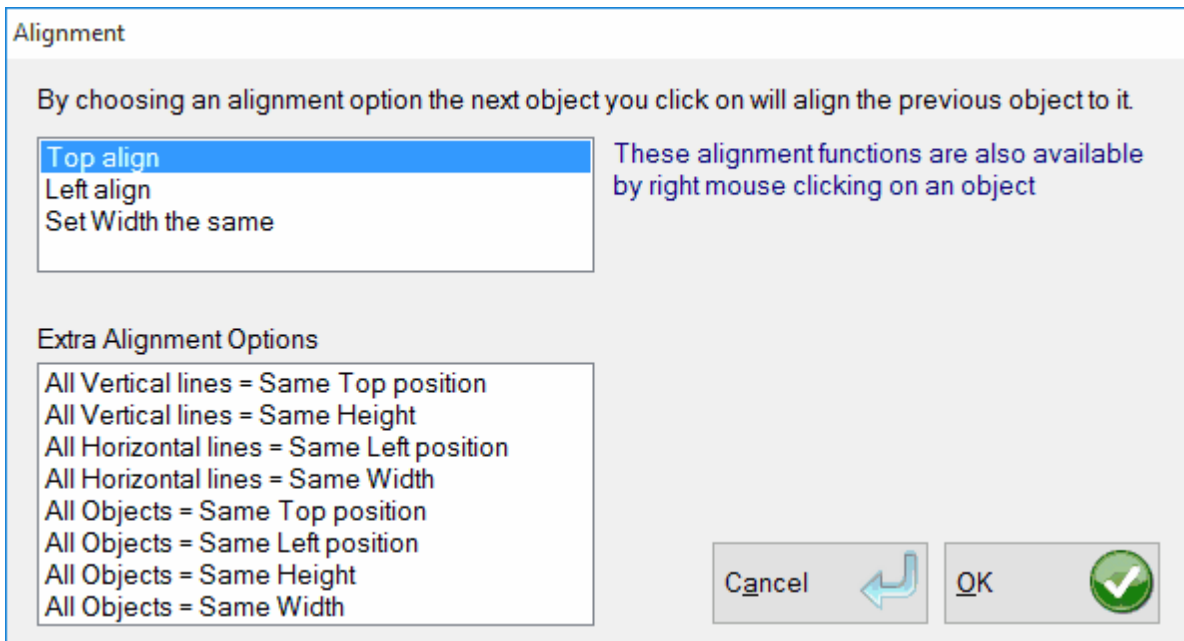
The dialog box titled "Object Location and Size" has a close button (X) in the top right corner. It contains four input fields: "Left Position (X)" with the value 3.48, "Width" with the value 3.84, "Top Position (Y)" with the value 4.09, and "Height" with the value 0.53. Each input field is followed by the unit "cm". At the bottom, there are two buttons: "Cancel" with a left-pointing arrow and "Close" with a circular arrow.

## 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.



The dialog box titled "Alignment" contains the following text: "By choosing an alignment option the next object you click on will align the previous object to it." Below this is a list box with three options: "Top align" (highlighted), "Left align", and "Set Width the same". To the right of the list box is the text: "These alignment functions are also available by right mouse clicking on an object". Below the list box is a section titled "Extra Alignment Options" with a list of seven options: "All Vertical lines = Same Top position", "All Vertical lines = Same Height", "All Horizontal lines = Same Left position", "All Horizontal lines = Same Width", "All Objects = Same Top position", "All Objects = Same Left position", "All Objects = Same Height", and "All Objects = Same Width". At the bottom right, there are two buttons: "Cancel" with a left-pointing arrow and "OK" with a green checkmark.

## Page Header

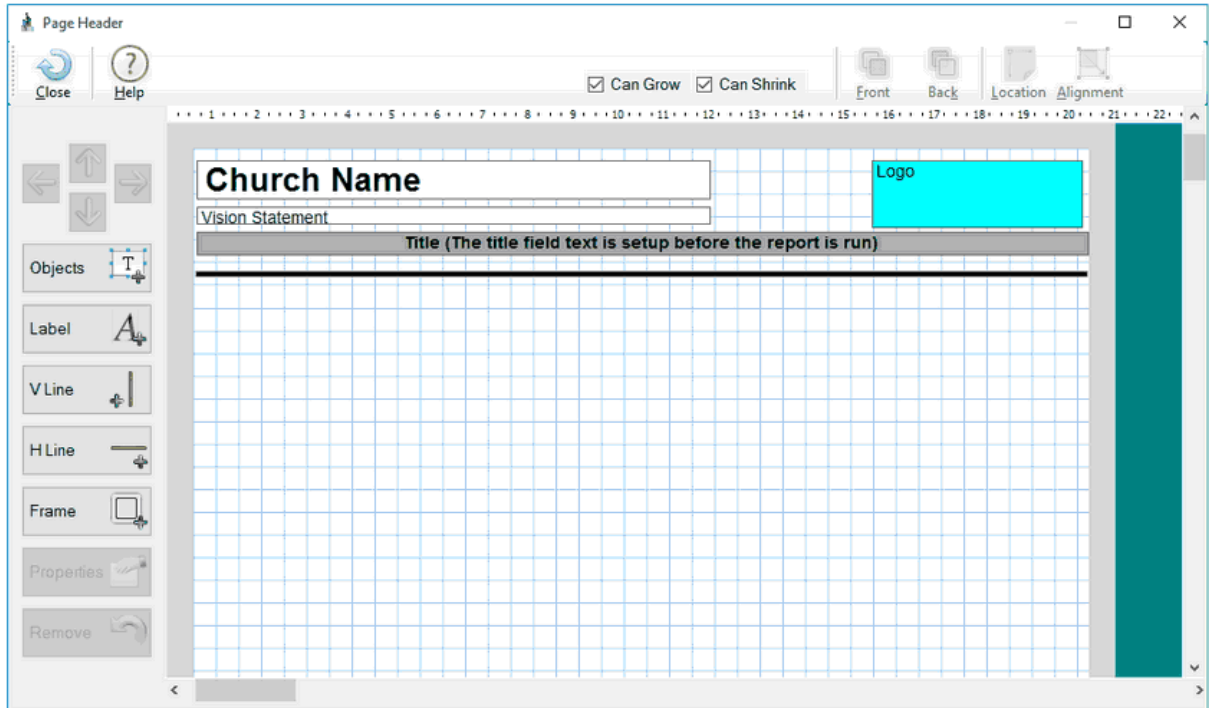
The Page Header object when added to a Custom Report appears at the top of the design area, just under the Report Header object if that is turned on. It is labeled as Page Header. The words Page Header will not print out on your final design report.

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.

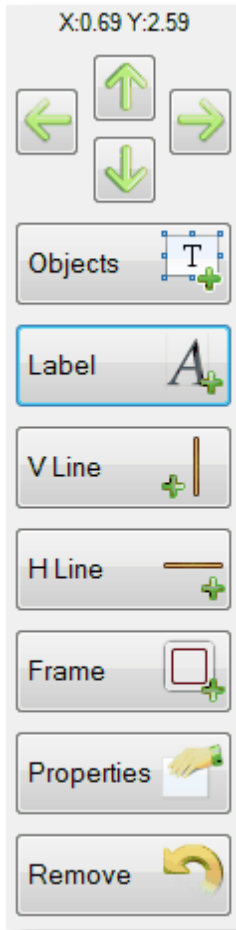


Click on each part of the Page Header Design Window below to learn more.



## Side Bar

The following buttons make up the left side of the Page 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.

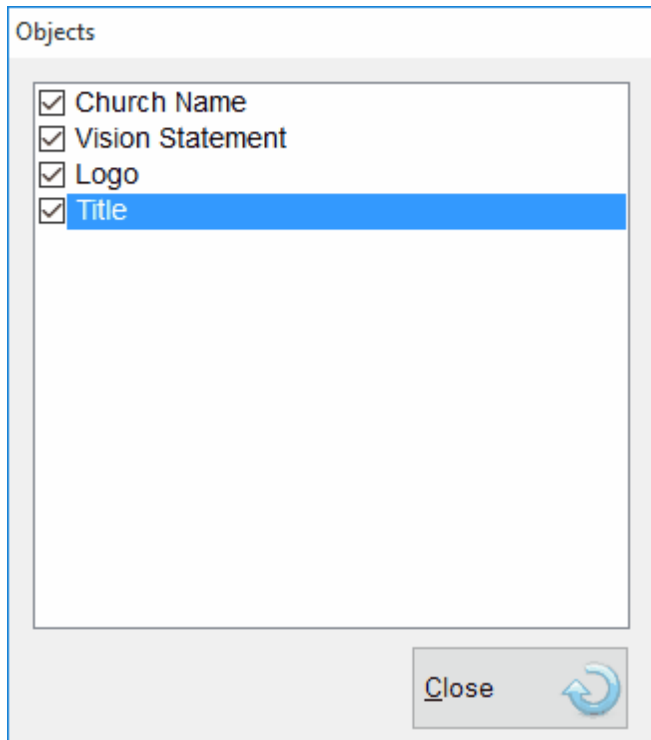


## Objects

The Objects window allows you to select the data objects that you want to include on your Report Header.

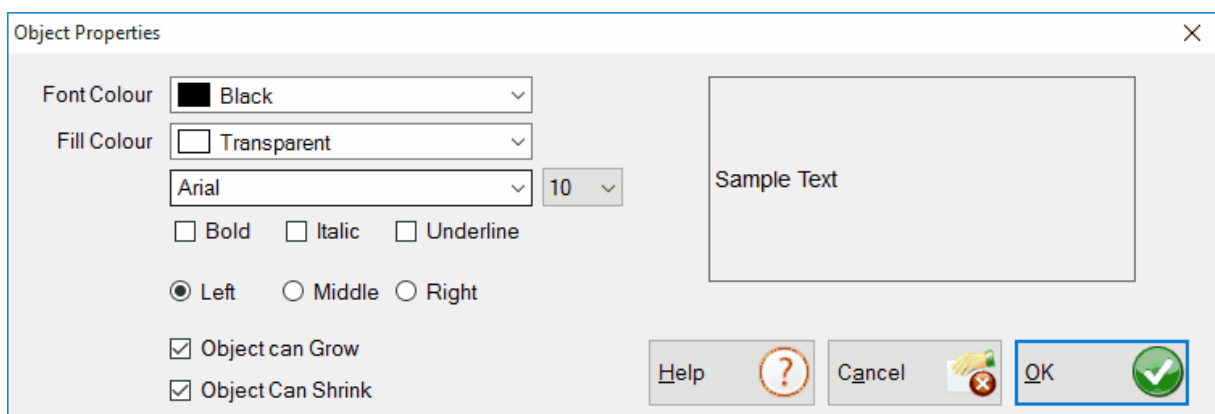


Click on each one below to learn more about each object and its properties.



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.

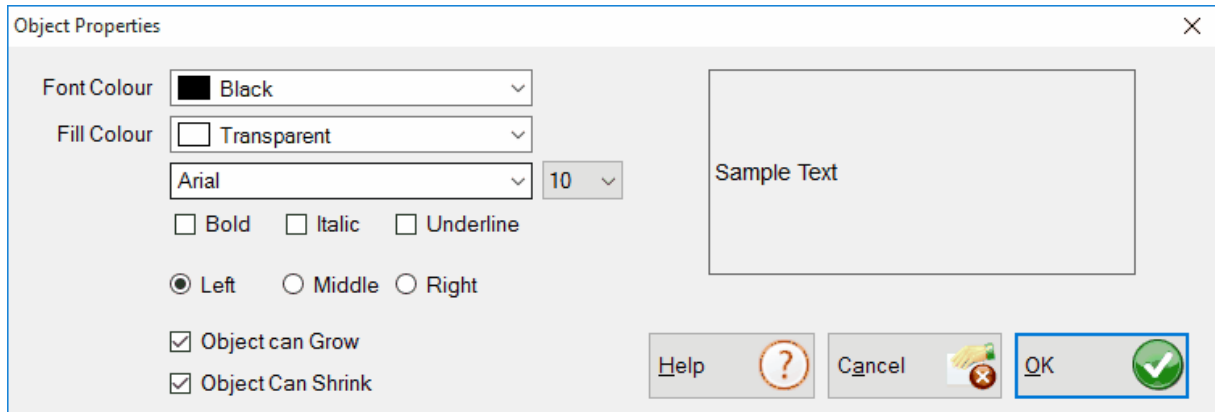


The Vision Statement Object shows the Vision Statement of the church as setup in the [Setup Vision](#) area.

**Double clicking** on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property

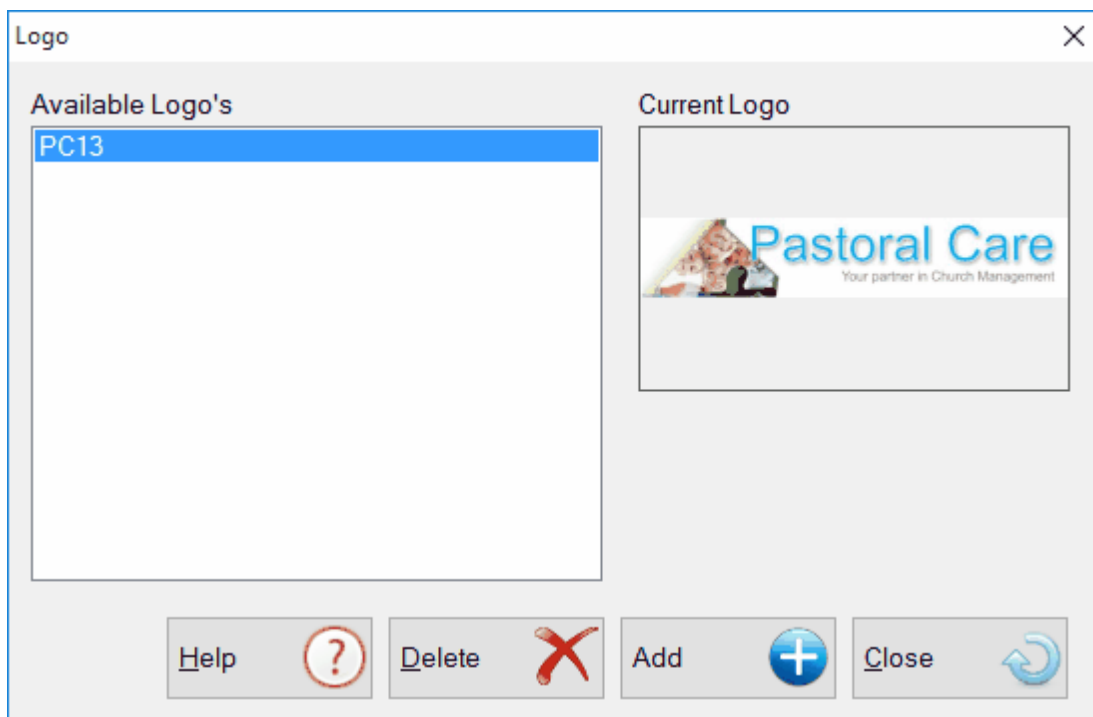


Window for setting fonts, colours, alignment etc.



The Logo Object lets you assign a Logo Image to print out on the report Header.

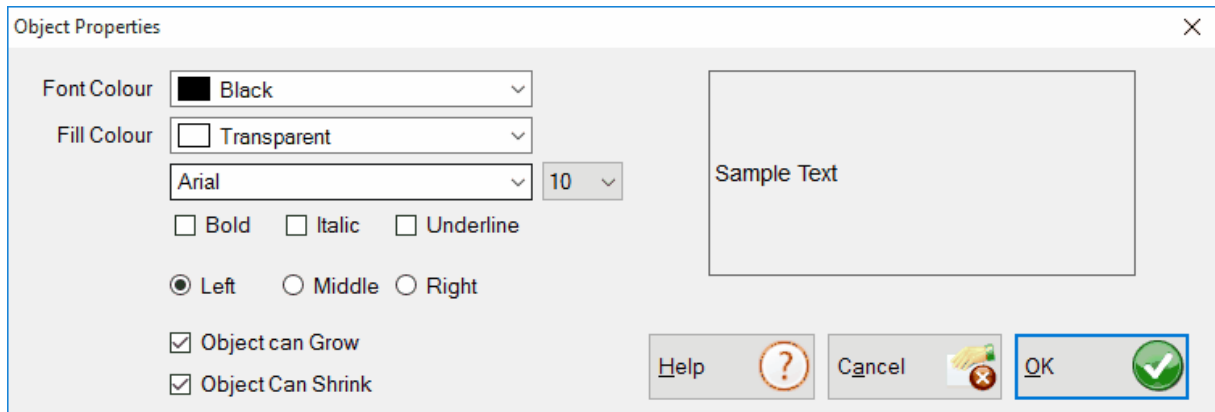
**Double clicking** on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for this object. This is shown below.



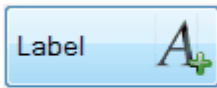
Select your logo from the Available Logo's and press Close to add this to the Report Header. If you want to make another logo available to the reports area, press the Add Button.

See [Add Logo](#) setup for more details.

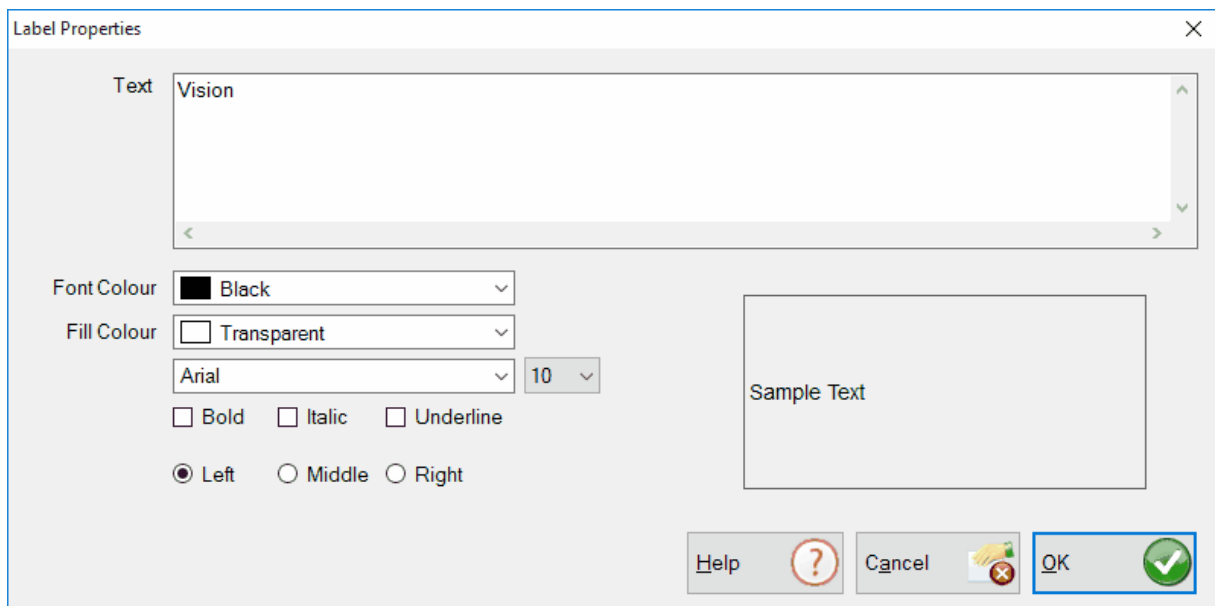
The Title field accepts information from the Title Area of reporting. This object will get its data from the [Report Title](#) area. Properties available for this object include all standard colour and font options.



## Label



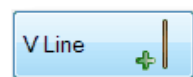
A Label is an object that allows you to simply type in some text and display it on the Report. Selecting Properties on a label opens up the following properties window.



You can Edit the Text for the label here, also set any standard Font property (Type, Colours, Alignment etc)

## V Line

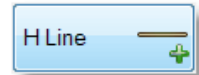
The Vertical Line Object places a Vertical line on the design grid. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line.



Double clicking on a line will open the [Line Properties](#) window.

## H Line

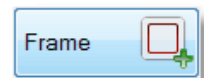
The Horizontal Line Object places a Horizontal line on the design grid. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line.



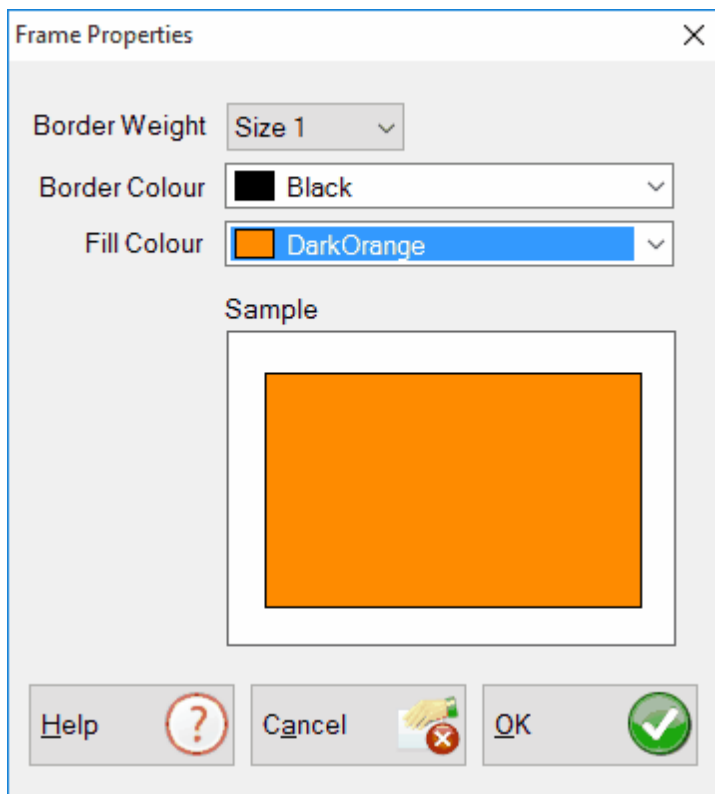
Double clicking on a line will open the [Line Properties](#) window.

## 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.

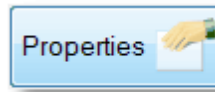


You can set Border Size and Colour, and Fill Colour for the Frame Object.



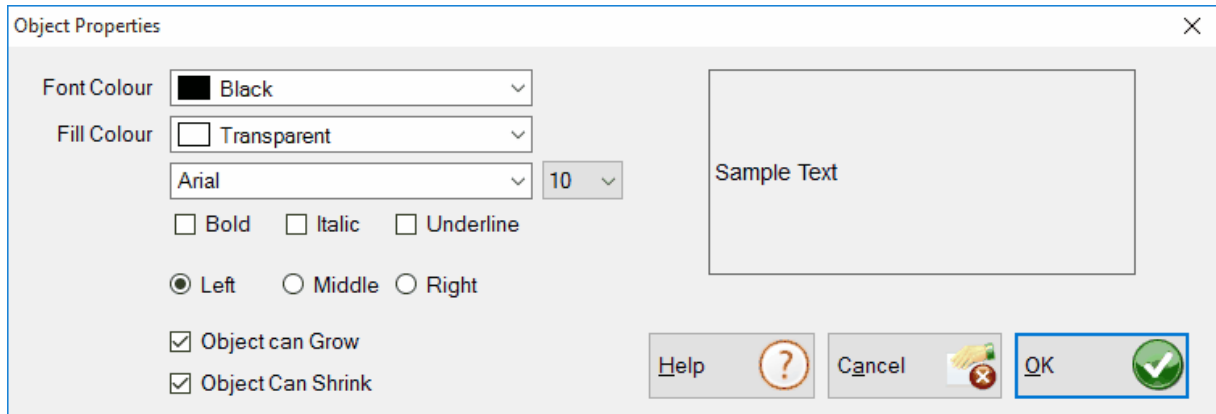
## Properties

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.

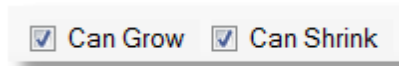
## Remove

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 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.



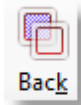
## Front

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.

Object Location and Size

Left Position (X)  cm    Width  cm

Top Position (Y)  cm    Height  cm

## 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.

Alignment

By choosing an alignment option the next object you click on will align the previous object to it.

   These alignment functions are also available by right mouse clicking on an object

Extra Alignment Options

## Page Footer

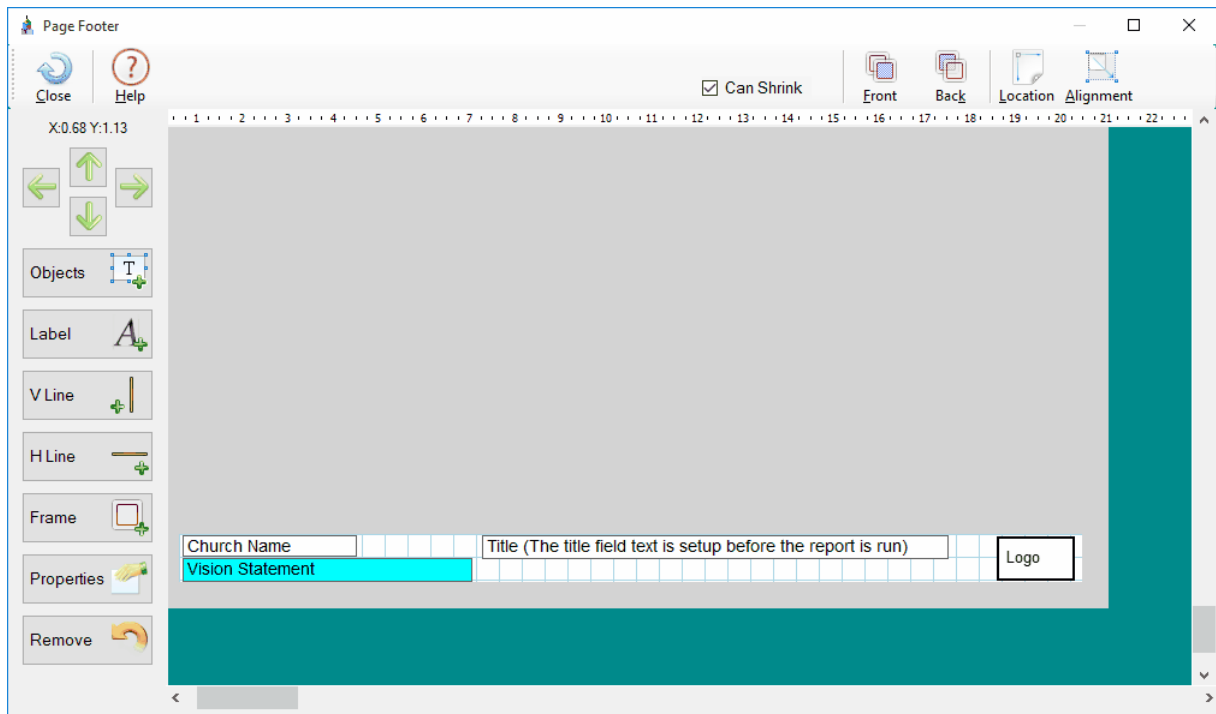
The Page Footer object when added to a Custom Report appears at the Bottom of the design area. It is labeled as Page Footer. The words Page Footer will not print out on your final design report.

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.

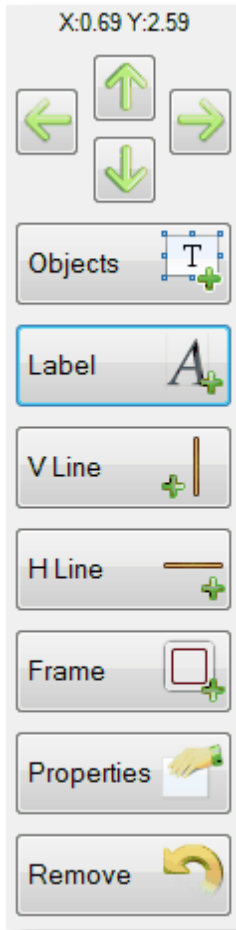


Click on each part of the Page Footer Design Window below to learn more.



## 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.

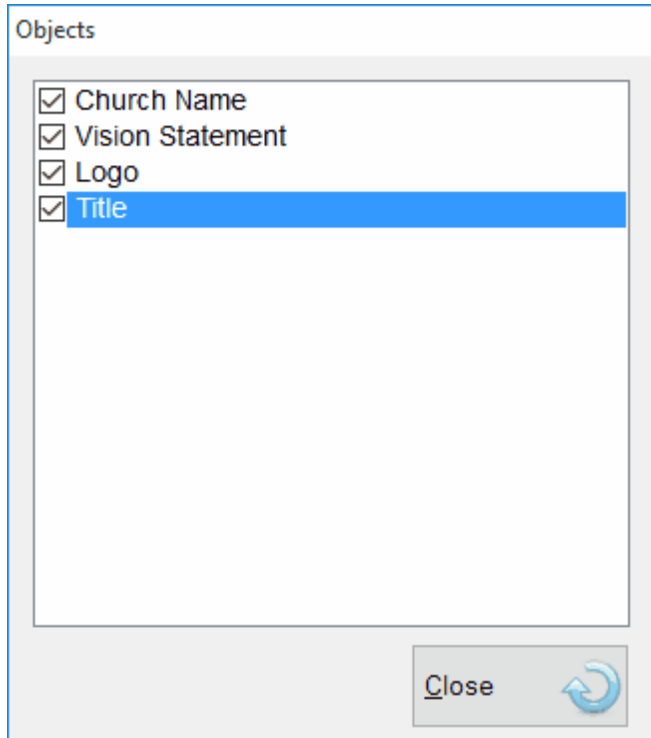


## Objects

The Objects window allows you to select the data objects that you want to include on your Report Header.

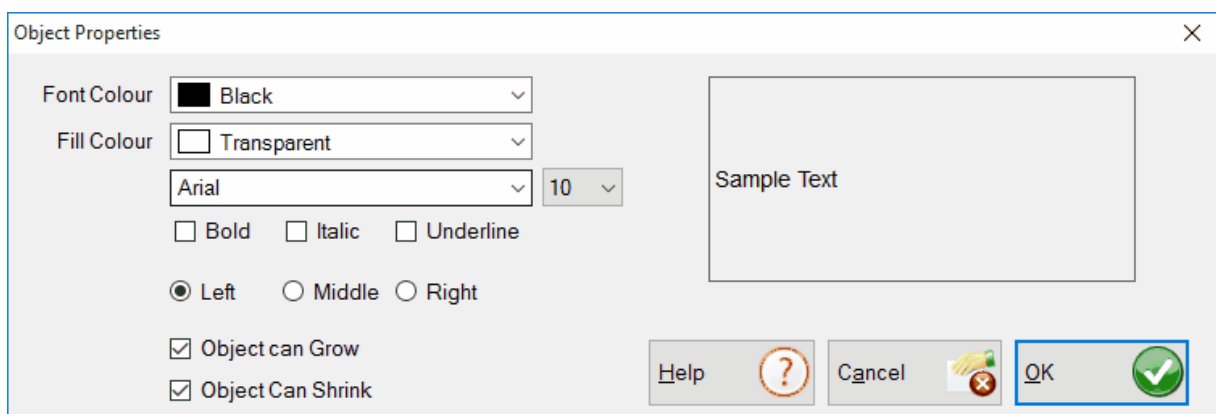


Click on each one below to learn more about each object and it's properties.



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.

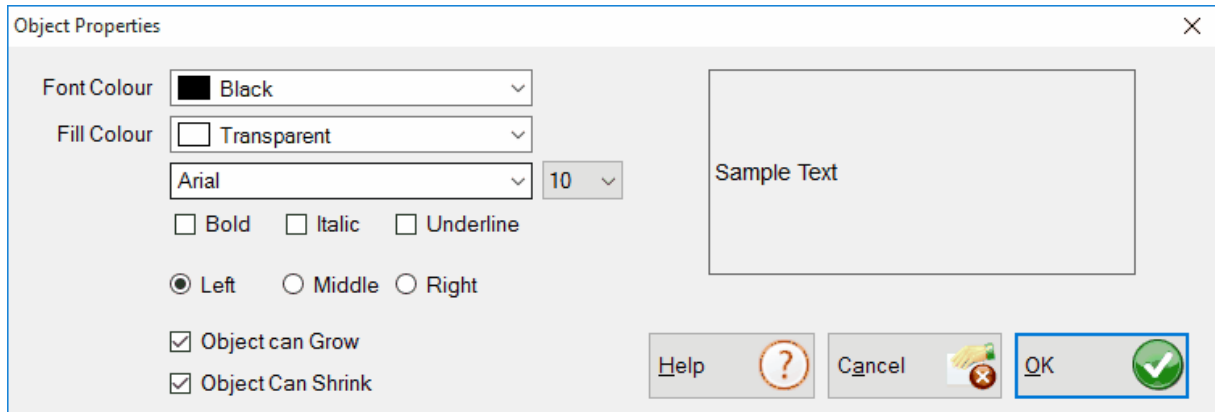


The Vision Statement Object shows the Vision Statement of the church as setup in the [Setup Vision](#) area.

**Double clicking** on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property

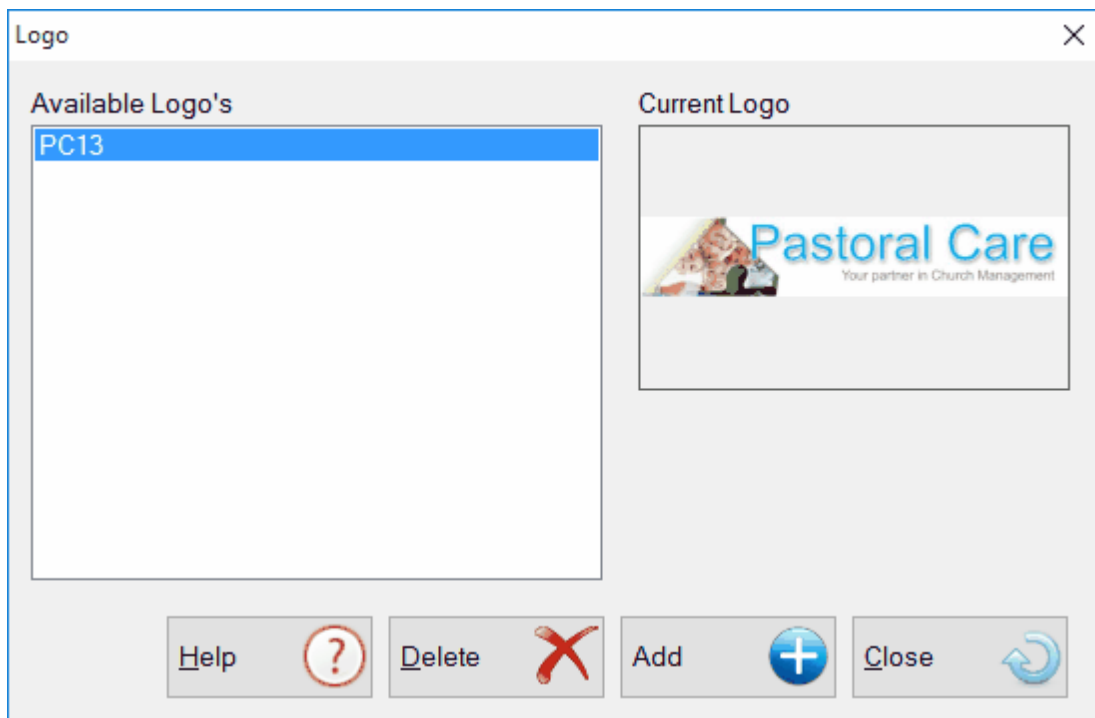


Window for setting fonts, colours, alignment etc.



The Logo Object lets you assign a Logo Image to print out on the report Header.

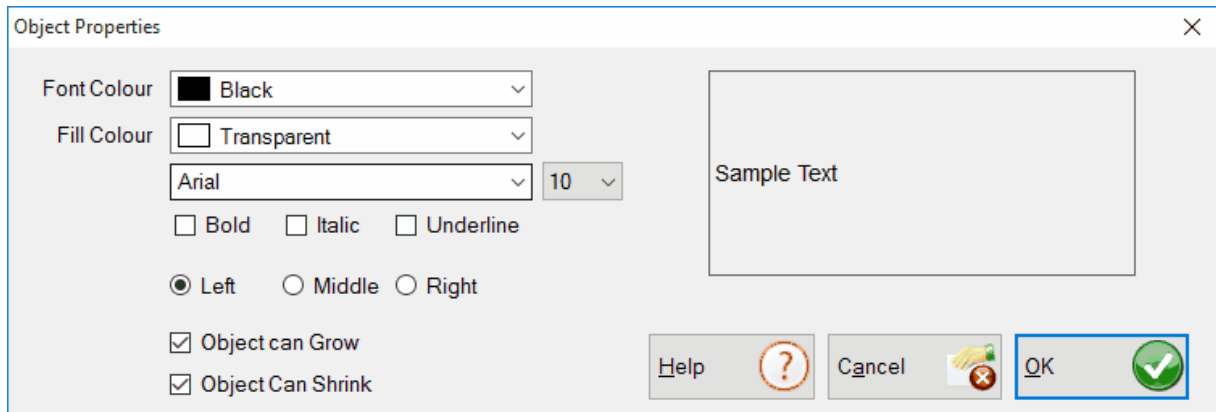
**Double clicking** on this object, or selecting it and pressing [Properties](#) on the [Side Bar](#) will open a Property Window for this object. This is shown below.



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.

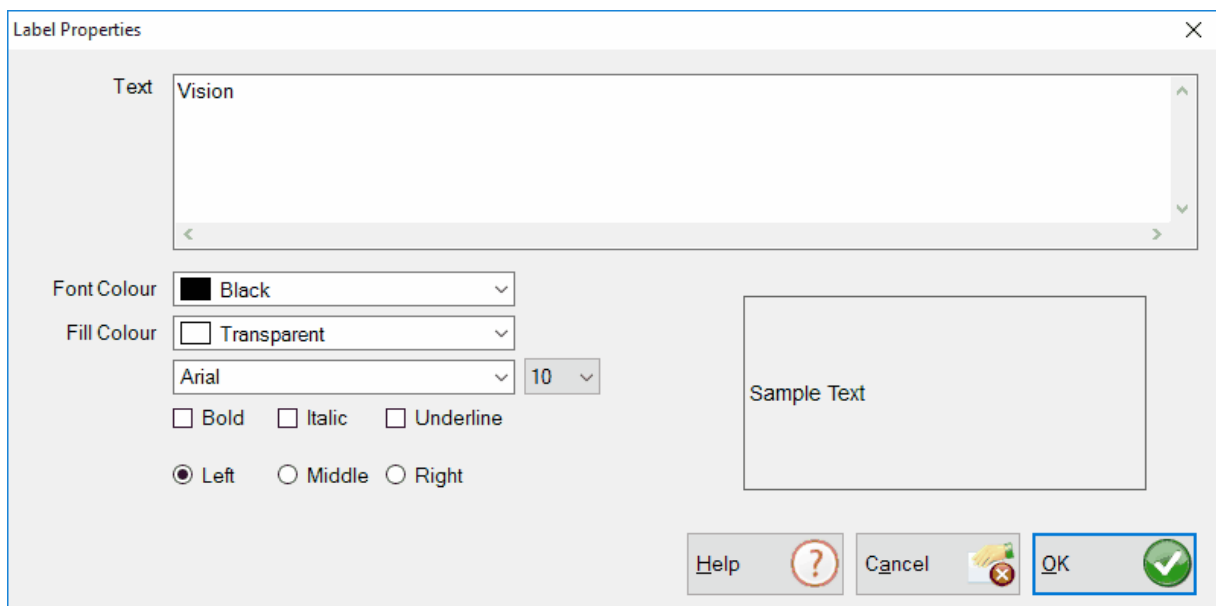
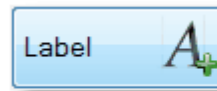
See [Add Logo](#) setup for more details.

The Title field accepts information from the Title Area of reporting. This object will get its data from the [Report Title](#) area. Properties available for this object include all standard colour and font options.



## Label

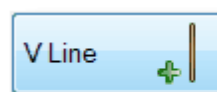
A Label is an object that allows you to simply type in some text and display it on the Report. Selecting Properties on a label opens up the following properties window.



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.

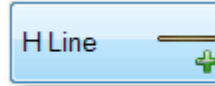


Double clicking on a line will open the [Line Properties](#)

window.

## H Line

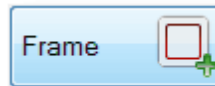
The Horizontal Line Object places a Horizontal line on the design grid. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line.



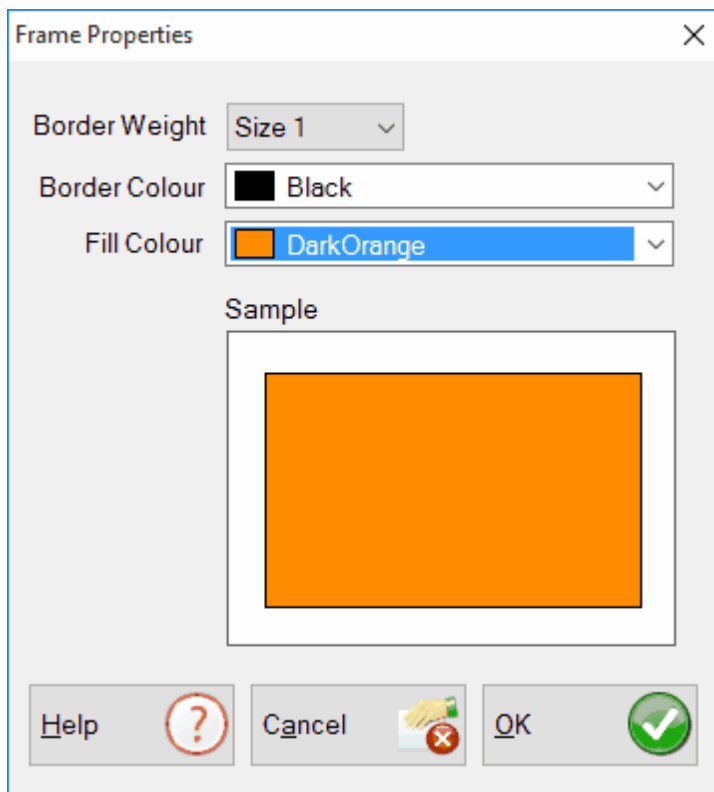
Double clicking on a line will open the [Line Properties](#) window.

## 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.

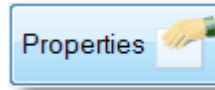


You can set Border Size and Colour, and Fill Colour for the Frame Object.



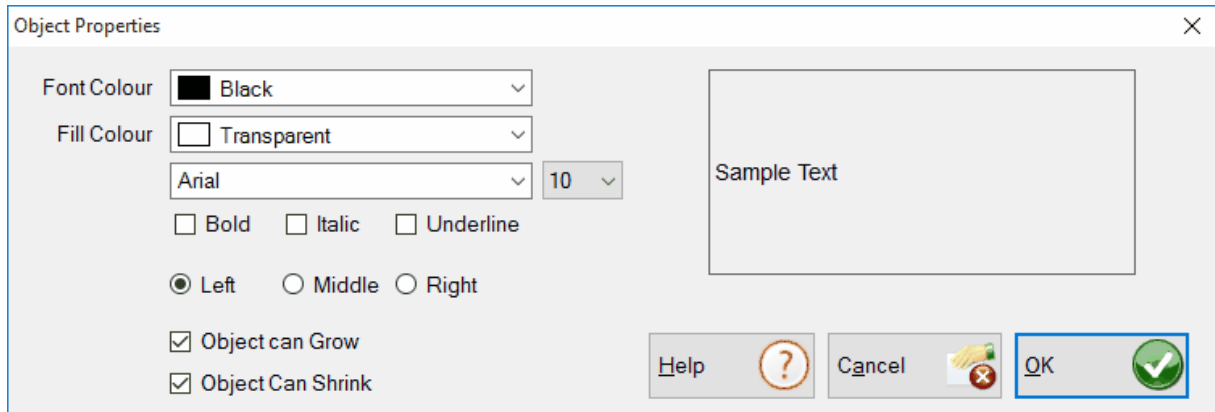
## Properties

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.

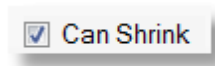
## Remove

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.



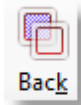
## Front

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.

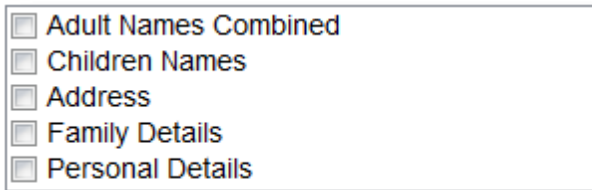
## Main Data Objects

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.



## 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](#)

[Email List](#)

[Other Contact](#)

[Family Groups](#)

[Family Events](#)

[Family Dates](#)

[Visitation](#)

[Family File Memo](#)

[SMS List](#)[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**

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.

- Sub Report Header
- Individual Name
- Status List



## 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
- Date
- Description
- Tag

### 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**

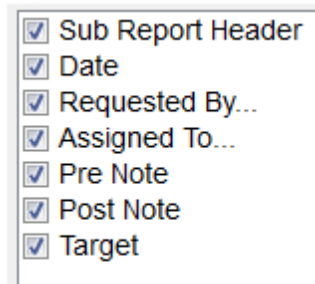
Tick this option to display the Visitation Post Note field on the sub report.

**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
- Memo

### 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.

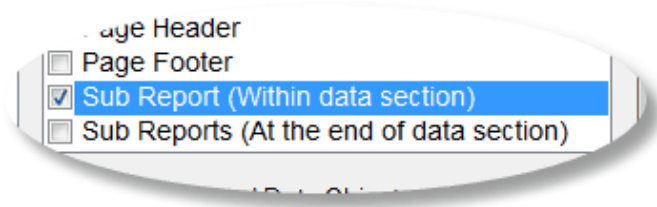
## Sub Report Within Data Section

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.**

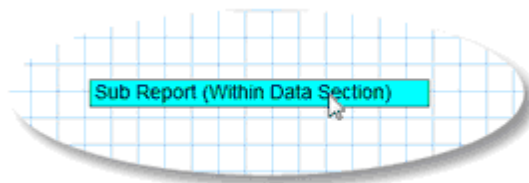
### Step 1

Select the Sub Report Within Data Section object from the [Page Objects](#) section of the Object list.



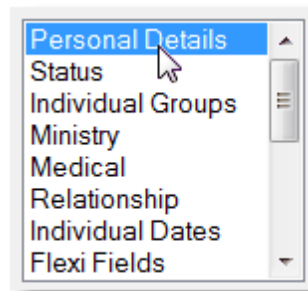
### Step 2

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](#))

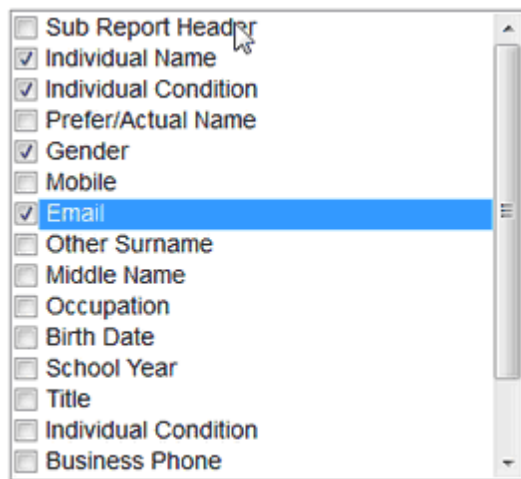


### Step 4

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.

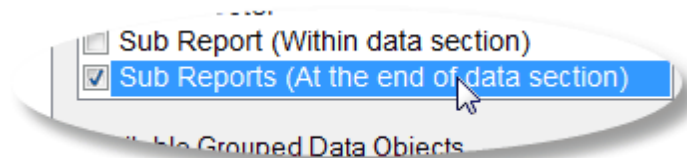
**For more information on Sub Report design, see the [Sub Report Design Window](#) for Sub Reports Within Data Section. This has more information on the use of this interface.**

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.

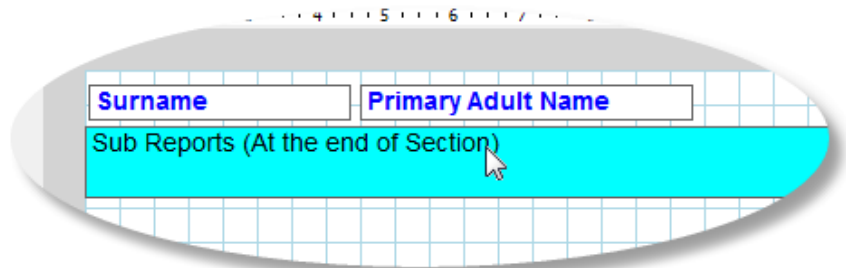
### Step 1

Select the Sub Report at end of Data Section object from the [Page Objects](#) section of the Object list.



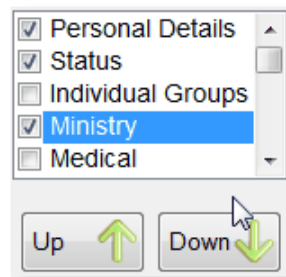
### Step 2

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.



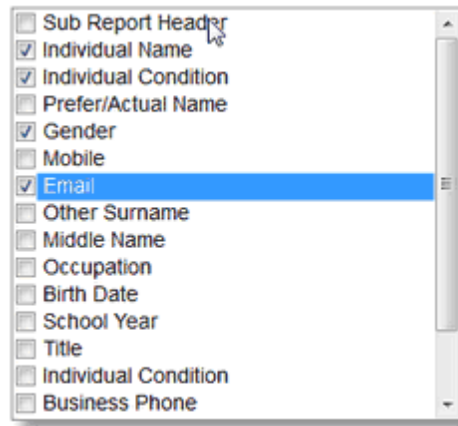
**This is the main point of difference in using the 2 different sub report options. In this sub report type, you have to tick the various areas you are wanting to include on your report, where as the Within Data Section sub report can only show one area of interest.**

**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.

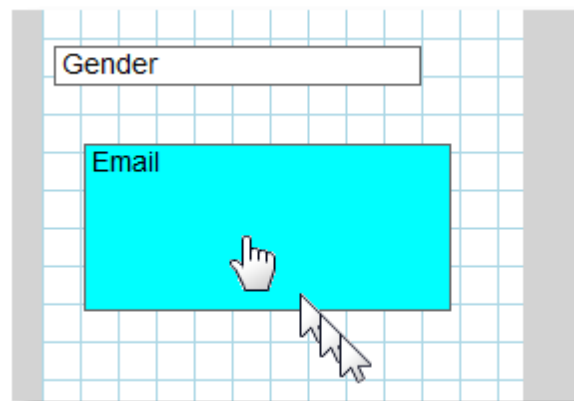


Pressing the Objects button will open up the list of fields for the selected area of interest.

## 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!

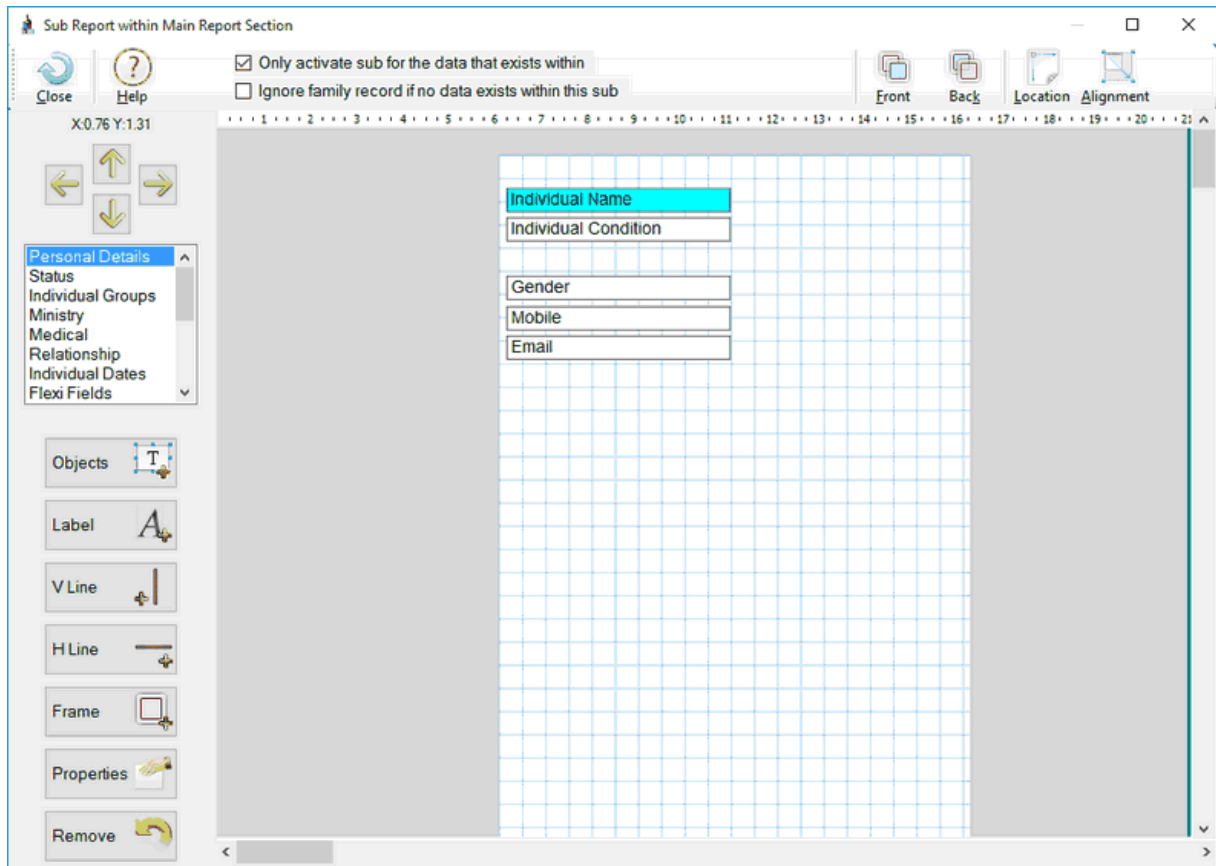


## Sub Report Design Window

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.



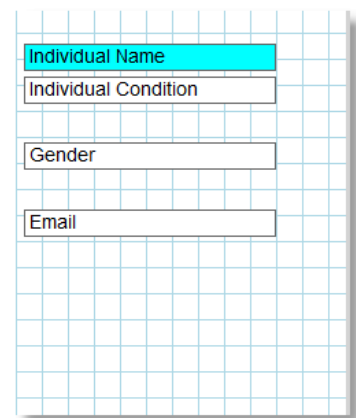
Click on each part of this window to learn more.



## 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.

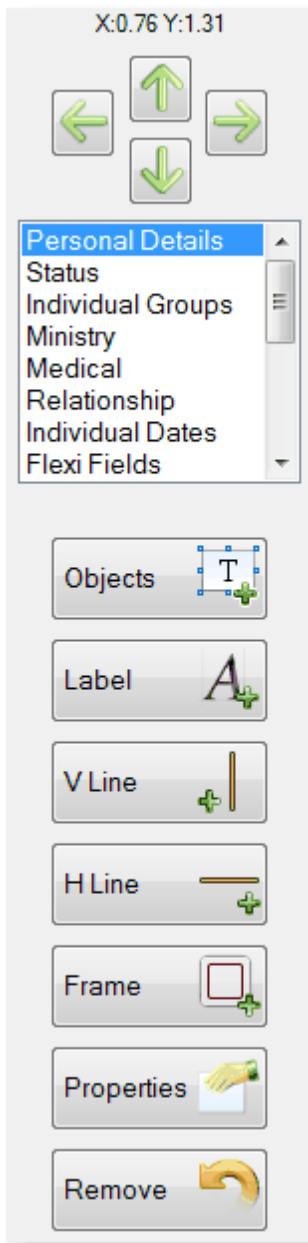


## Side Bar

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.

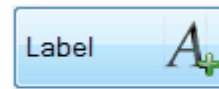


## Objects

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.



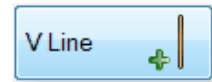
You can Edit the Text for the label here, also set any standard Font property (Type, Colours, Alignment etc)

## 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

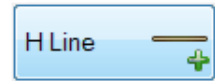
The Vertical Line Object places a Vertical line on the design window. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line. Vertical lines are repeated down the page for each record.



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.

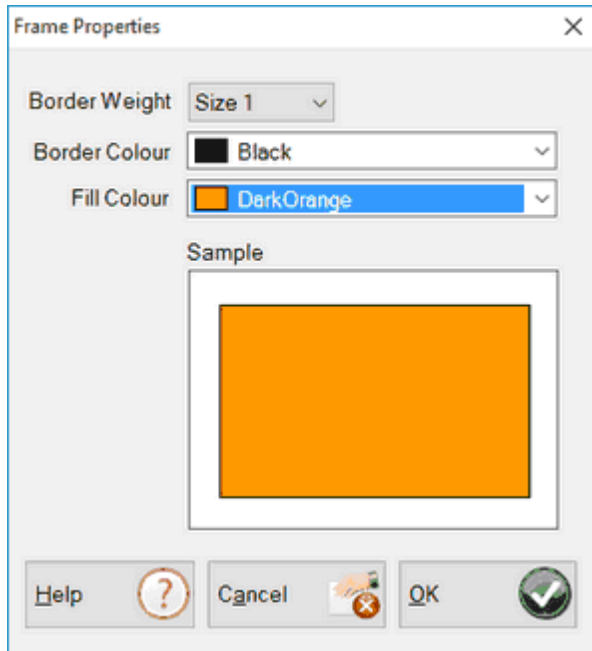
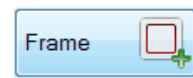


Double clicking on a line will open the [Line Properties](#) window.

### Frame

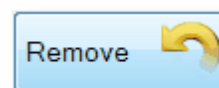
The Frame Object is simply a Rectangle that you can use to provide highlighting or boxing of a section. This object cannot auto grow, so you need to consider how information will display alongside or on top of this object.

You can set Border Size and Colour, and Fill Colour for the Frame Object.



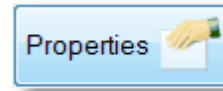
### Remove

Remove the selected object from the design grid. You can also press [Objects](#), and un-tick the object that you want to remove.



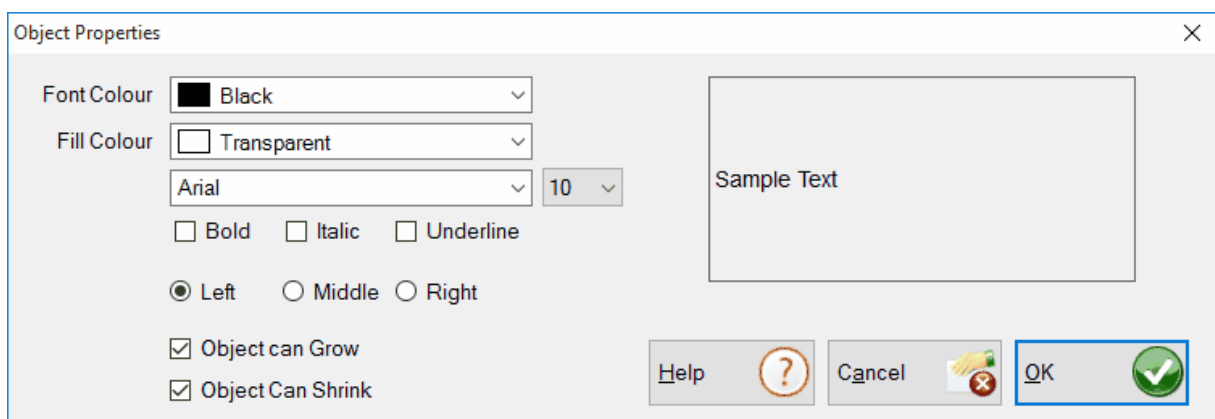
## Properties

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.

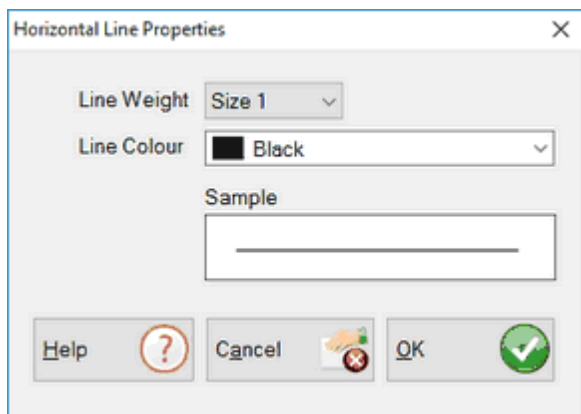


Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

## Automatic Sizing Features

The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size 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.

## Line Properties



You can select different Line Weights and Line Colours from the Line Properties window.

## Toolbar

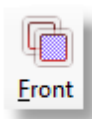
Shown below are each of the Toolbar options for the Sub Report design areas.

Only activate sub for the data that exists within

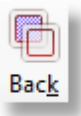
Tick this option to turn the Sub Report on only for the information fields that have data in them, and to ignore / remove redundant fields for the current record.

Ignore family record if no data exists within this sub

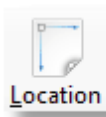
If this sub report has no data to display, then do not include the current record (Family or Individual) on the report at all.



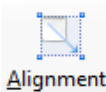
Bring the selected object in front of all other objects. See [Front](#)



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.

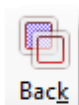
### Front

Bring the currently selected object to the front of the page, this makes this object cover any objects that might be overlapping.



### Back

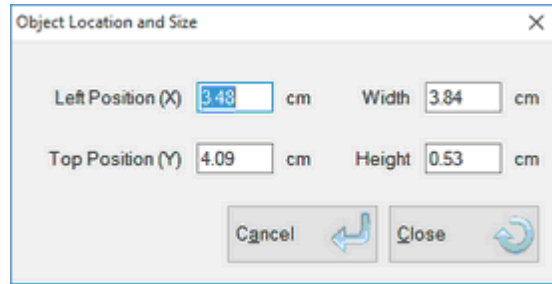
Send the currently selected object to the back of the page, this makes this object sit behind or be covered by any overlapping objects.





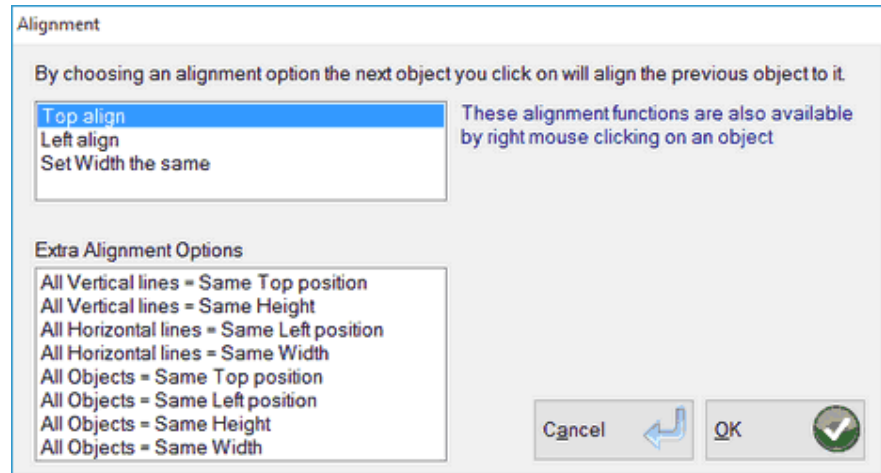
## Location

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!



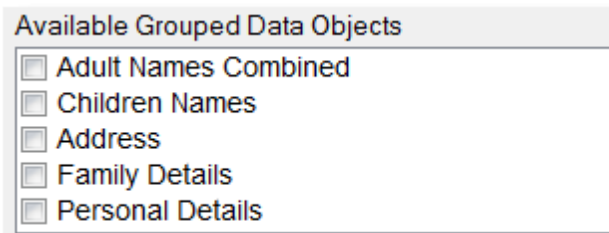
The first four options on this window are also available by Right Clicking on an object on the design area of the Custom Directory Designer. To run any of the Extra Alignment Options, simply select one of the options, press OK and then click on an object.

## 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.



## 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

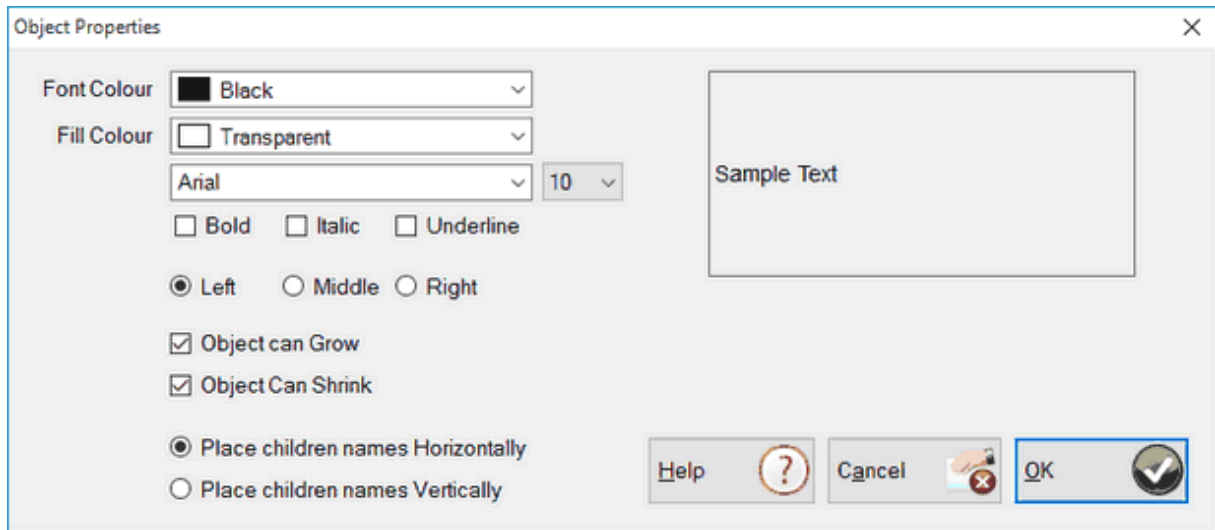
Note, in Horizontal Orientation, the comma's are automatically put in.

## 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.

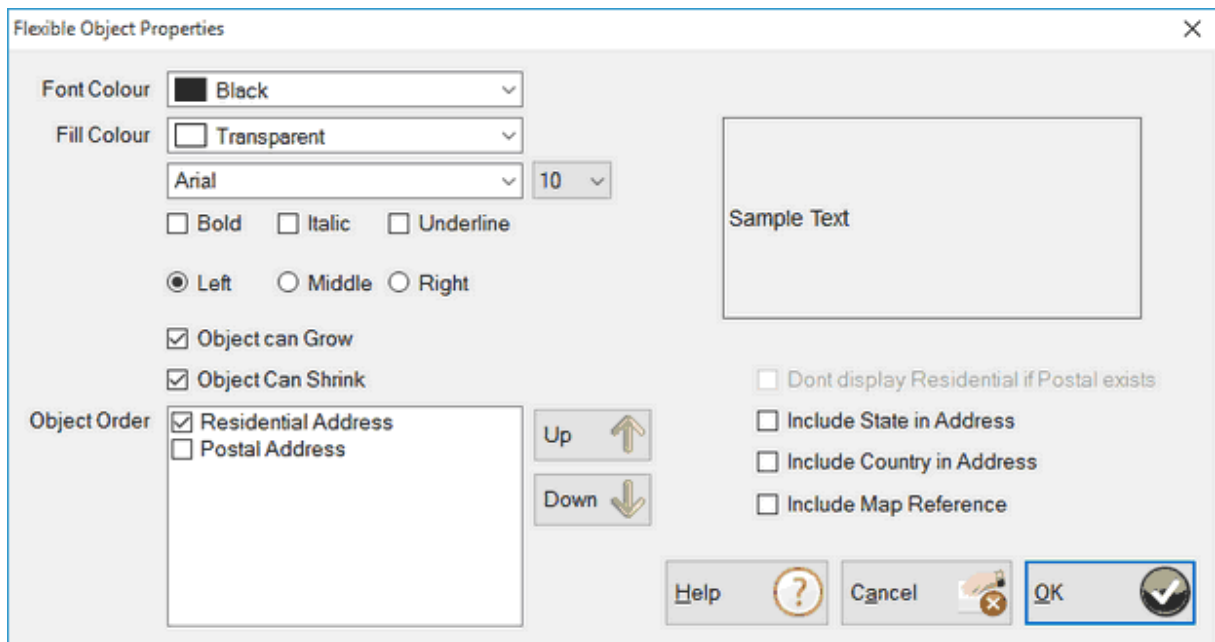
## Object Properties

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.



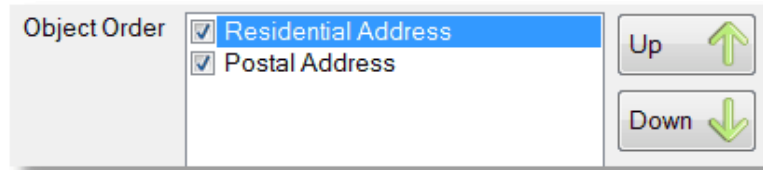
Use this Properties window to set all standard font options (Colours, Size, Style, Alignment etc) and also automatic object sizing properties.

## 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.



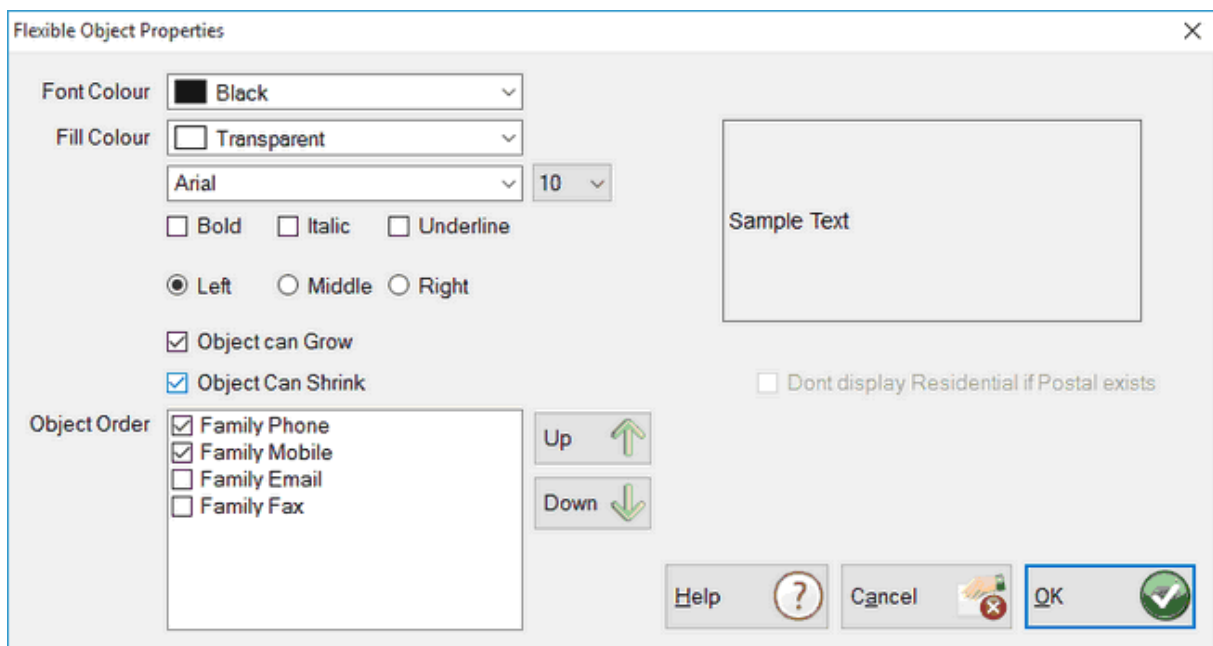
Use the Arrow keys to change the order of display.

## 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

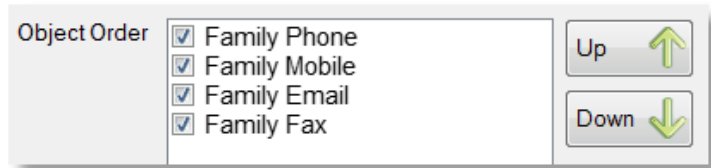
The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size itself in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

## 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

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 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.

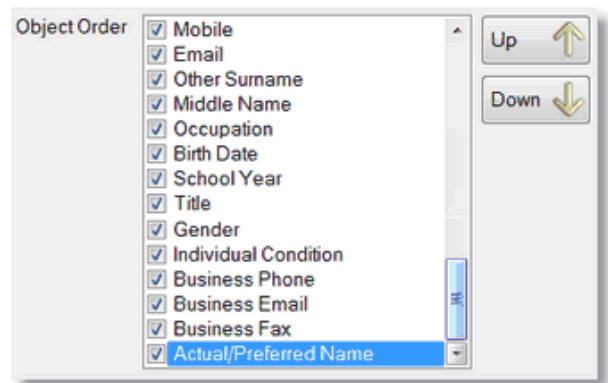
## Object Order

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.

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.

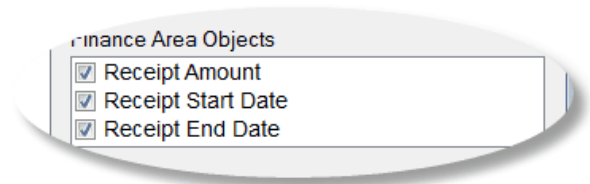
## Create a Receipt

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

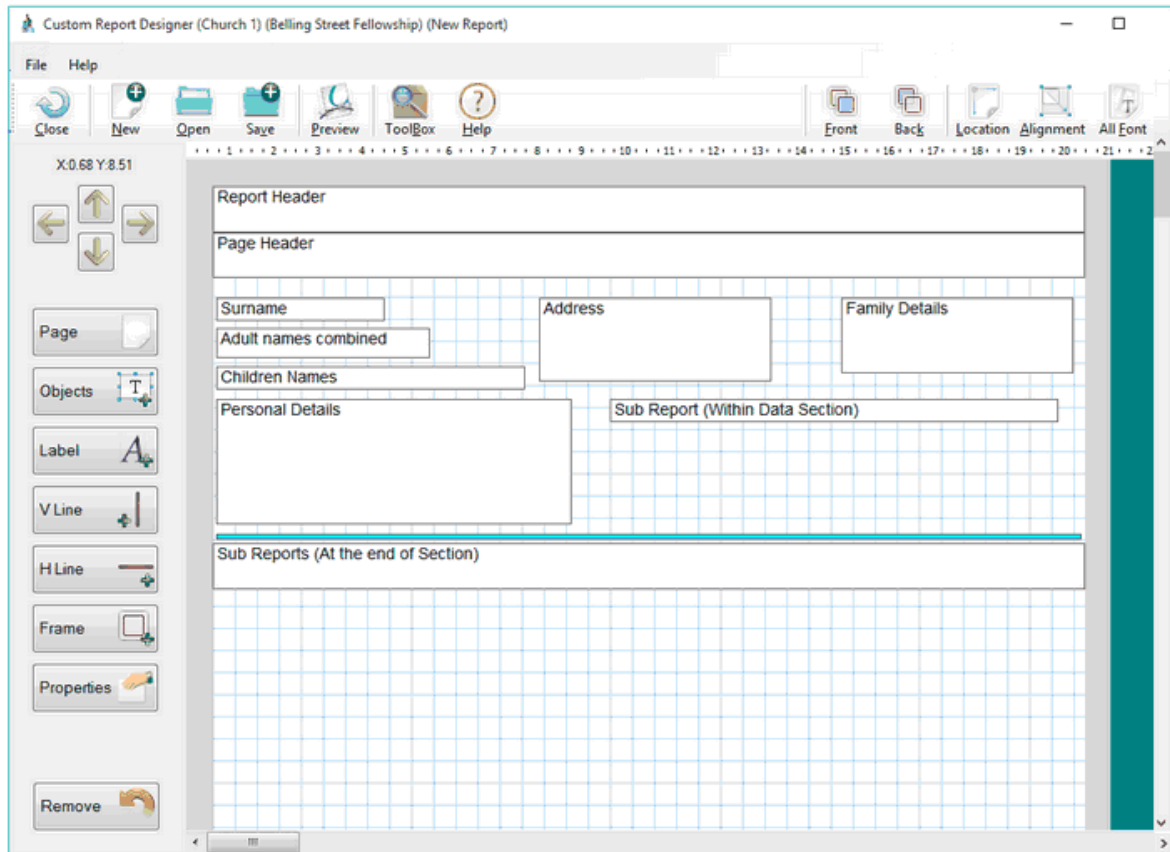
Select each item that you want to include on your receipt. Most people will want all 3 items as this will display the date range of the receipt, as well as the total amount donated within that period.

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 sit's 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

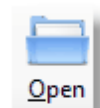
Shown below are each of the Toolbar buttons for the Custom Directory Designer.



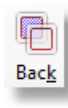
Press New to start creating a new Custom Report from scratch.



Bring the selected object in front of all other objects.



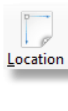
Press Open to select an already created Custom Report to open for modification.



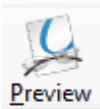
Send the selected object behind all other objects.



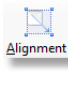
Press Save to save your Custom Directory. Saving makes your changes permanent, and makes your template available in all reporting areas of Pastoral Care.



Use [Location](#) to fine tune the size and position of the selected object.



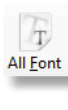
Use [Preview](#) to take your Custom Report for a test drive!



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

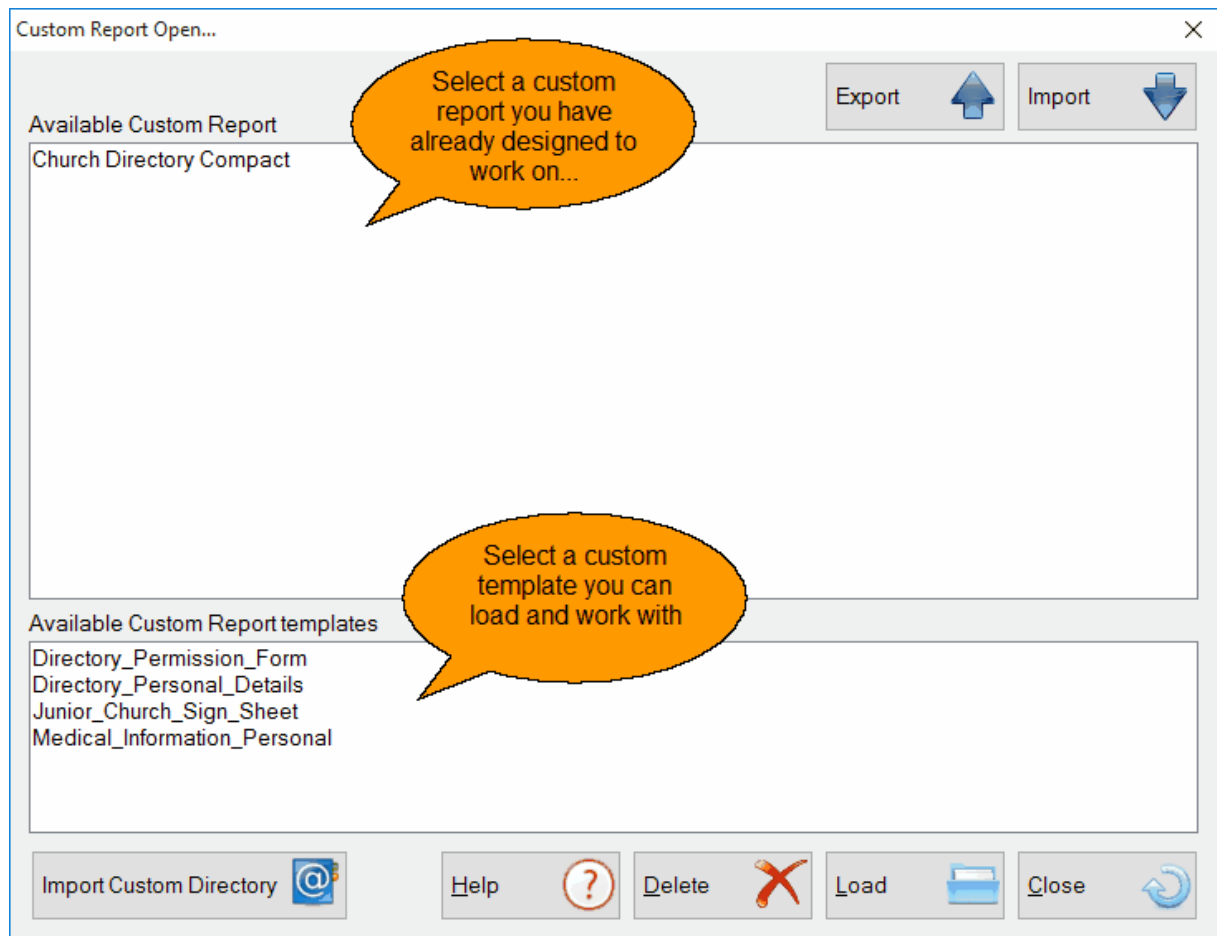


Press the Open Icon on the toolbar to select an already designed Custom Report for editing.



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.

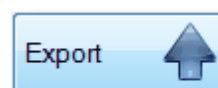
### Available Custom Templates

This is where your Custom Template are listed that you can design 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.

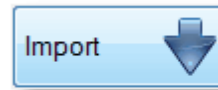
### Export

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.



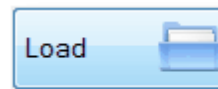
### Delete

Delete the selected Custom Report.



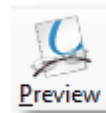
### Load

Load the selected Custom Report.

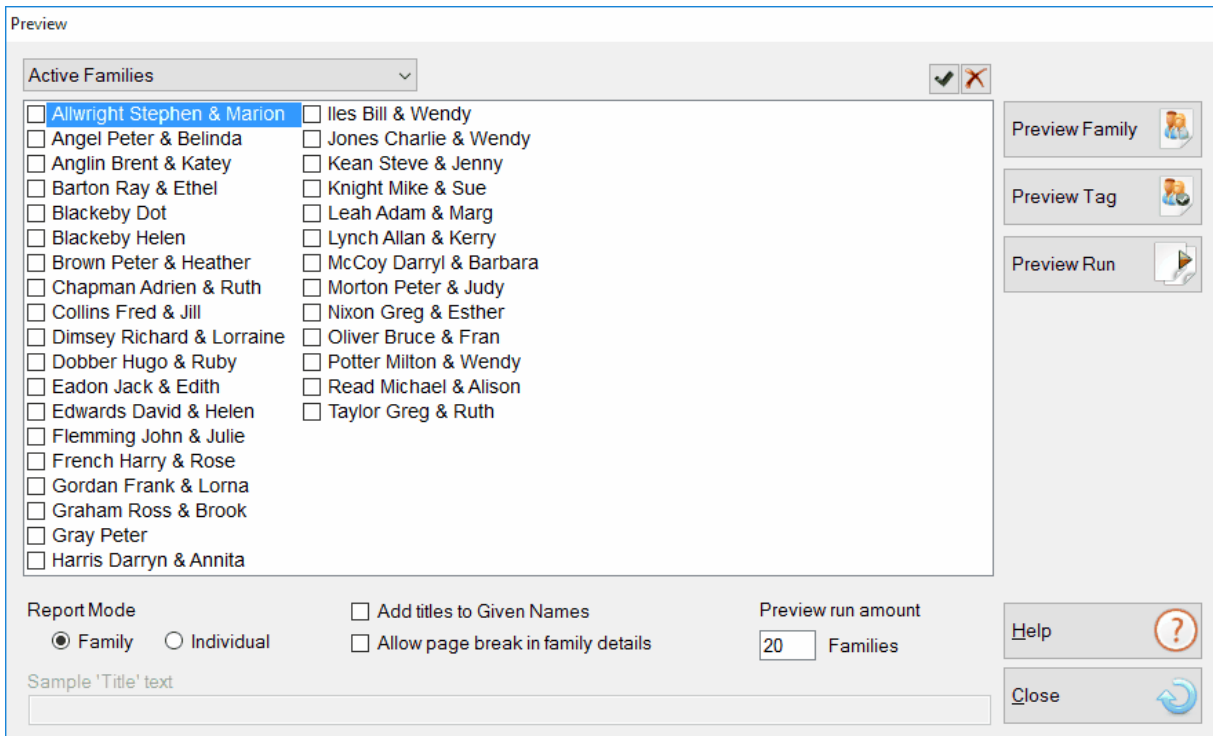


### Preview

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.

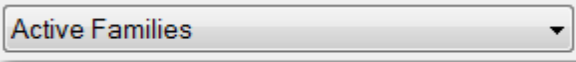


Click on each part of the Preview Window below to learn more about this feature.



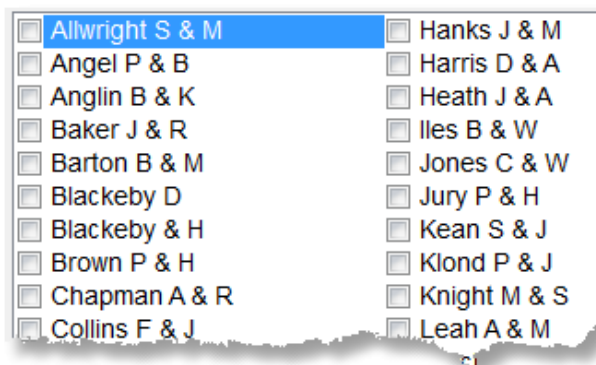
**Family Filter**

Select a Family Filter for running your preview on. For most people, Active Families as the default is perfect for this job!



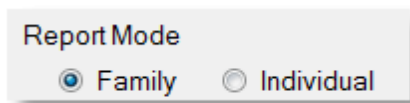
**Select Families**

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.



**Report Mode**

Choose to run your report preview in Family Mode, or Individual Mode.



### 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 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.

Preview Run



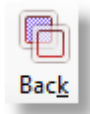
### Front

Bring the currently selected object to the front of the page, this makes this object cover any objects that might be overlapping.



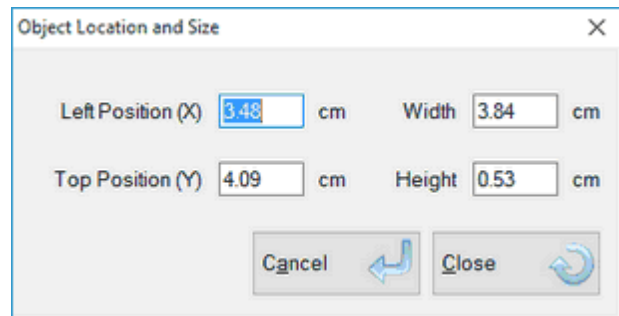
## Back

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.

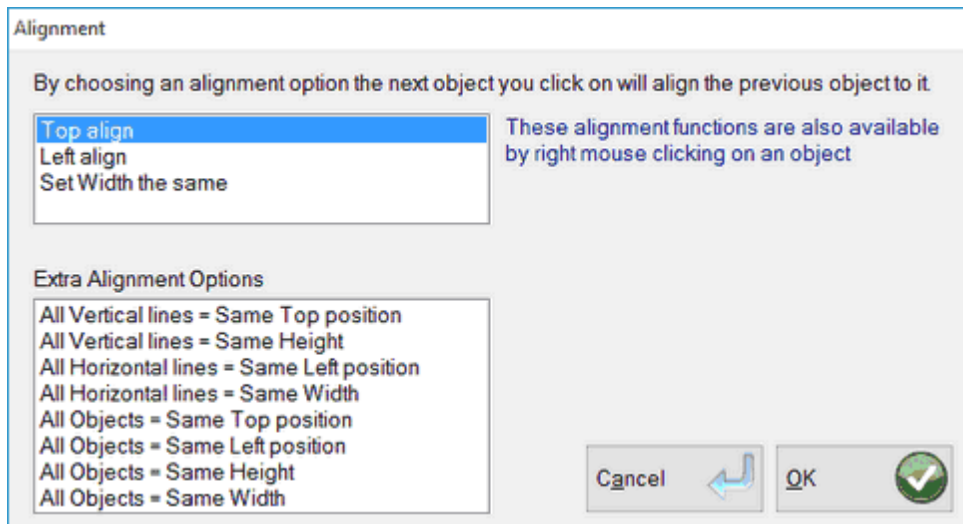


## Alignment

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!

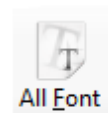
The first four options on this window are also available by Right Clicking on an object on the design area of the Custom Directory Designer.

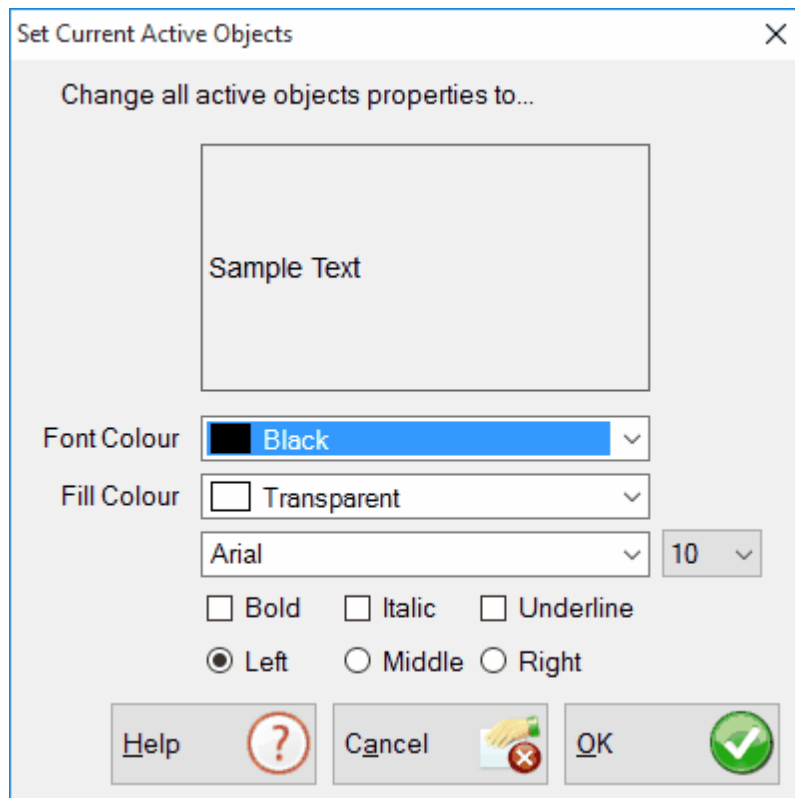
To run any of the Extra Alignment Options, simply select one of the options, press OK and then click on an object.



## All Font

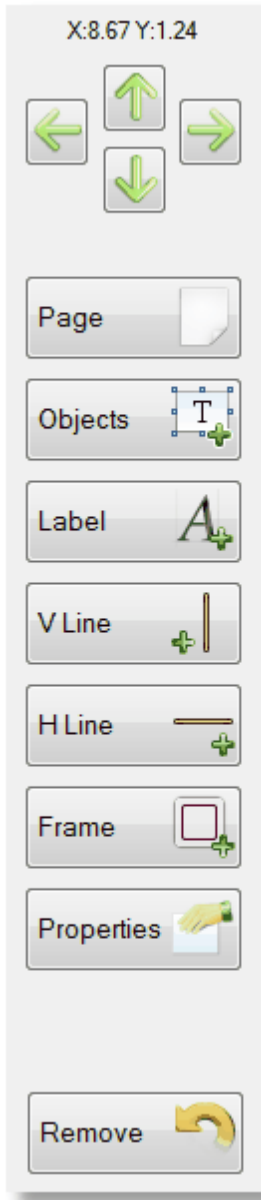
Use the All Font option to set the font properties on all objects currently on the report to be the same.





## Side Bar

The following buttons make up the left side of the Custom Directory Design Window. Click on each item for more information.



## Nudge

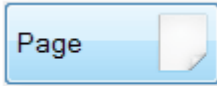
Use the 4 nudge buttons to push the currently selected object in the direction of the arrow you are pressing.

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.

Page Properties

Custom Report Page Setup

- Page Size
- Work Area Grid
- Page Numbering
- Alphabetical Separators
- Divider Lines
- Miscellaneous

Page Size...

A4

Portrait  Landscape

Custom page size

Width  cm Height  cm

---

Margins

Left  cm Right  cm

Top  cm Bottom  cm

---

Columns  Spacing  cm

Print Down Columns  Print Across Columns

---

Mirror Margins Gutter  cm

Help ? Cancel Close

## Page Size

The following page size options exist for Custom Reports.

Choose from A3, A4, A5, Letter, Legal, DL Envelope or Custom.

Custom allows you to enter your page size manually. Note, Page Sizes selected must be supported by your printer.

A4

Portrait  Landscape

Custom page size

Width  cm Height  cm



Enter your margins needed for the page selected.

<b>Margins</b>					
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

Enter the Number of columns. Usually, you will only use one column for most reports. Multiple columns are useful for creating lists or labels.

Columns	<input type="text" value="1"/>	Spacing	<input type="text" value="0.2"/>	cm
---------	--------------------------------	---------	----------------------------------	----

Tick this to allow Pastoral Care to create a gutter margin for binding. This allows for double sided printing to always have the largest margin on the Bind side of the page.

<input type="checkbox"/> Mirror Margins	Gutter	<input type="text" value="0"/>	cm
---	--------	--------------------------------	----

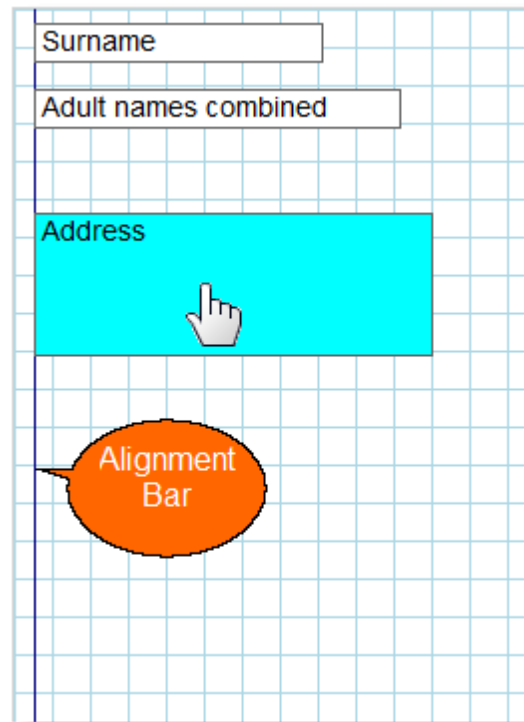
### Work Area Grid

<input checked="" type="radio"/> Lines	<input type="radio"/> Dots	<input type="radio"/> None
Spacing	<input type="text" value="0.50"/>	cm
<input checked="" type="checkbox"/> 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.

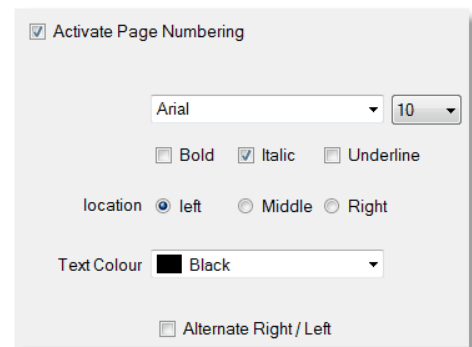


## Page Numbering

Set the various options for controlling the display of Page Numbers on your custom report.

Font options exist here, as well as font colour.

For double sided printing, try the Alternate Right / Left option so that the page number is always on the outside edge of the page!



## 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.

Setting a Back Colour will print a coloured bar across the page with the Alpha Position printed over that bar.

The dialog box is titled 'Add alphabetical letter separators' and has a checked checkbox. It contains the following settings:

- Font: Arial (dropdown), Size: 10 (dropdown)
- Style options: Bold (unchecked), Italic (unchecked), Underline (unchecked)
- Location: left (selected with radio button), Middle (unchecked), Right (unchecked)
- Text Colour: Black (dropdown)
- Back Colour: Black (dropdown)

## Sample Alphabetical Separator

The sample report displays four customer records, each separated by a horizontal line and a large blue letter (A, B, C) on the right side. The records are:

- A**: Allwright, Mr. Stephen & Mrs. Marion, Stephen, Marion, 11 BLACKDOG ROAD, Riddels Creek 3412, Ph:054-33-5478
- B**: Barton, Dr. Big Ray & Mrs. Mum, Big Ray, Mum, 8 KING ST, Sunbury 3089, Ernie, Karen, Ph:03-744-1222, Mobile:041234567890
- C**: Blackeby, Mrs. Dot, Dot, Mum, 13 GRIFF ST, Kellor Heights 3191, Mobile:041234567890
- Collins, Mrs. Fred & Jill, Fred, Jill, 12 FERRIER ST, Sunbury 3089, Stephen, Mobile:041234567890

## Divider Lines

Choose to draw a line between records, and also at the bottom of each page.

A record can be a Family, or an Individual depending on the report output selected.

Draw a line between records

Line Weight

Line Colour

Sample

Draw a line at the bottom of each page

Line Weight

Line Colour

Sample

## Miscellaneous

Use the Miscellaneous options for adding further enhancement to your custom report.

These options are self explanatory, however of note are the Family Mode and Individual mode options to always run a report in a specific mode. This is very useful if you have designed a report to be used in one or the other mode.

You can also use Page Break options to force a report to always start a new page for each new person or family on the report.

Add Title to given name

Allow Page Break if all the family details don't fit on the page

Force page break

After a record     After alphabetical change

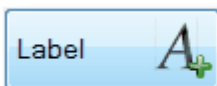
Always run this report in Family mode

Always run this report in Individual mode

## Objects

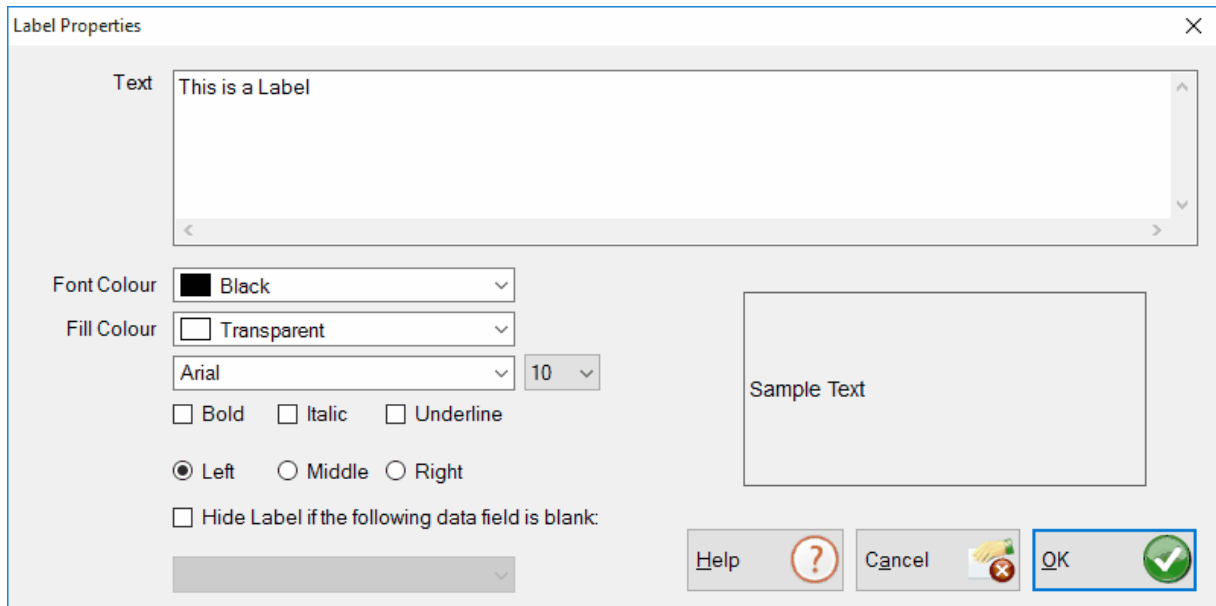
The Objects window allows you to select the data objects that you want to include on your Directory. This is the covered in the topic [Object Picker Window](#).

### 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.



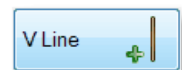
You can Edit the Text for the label here, also set any standard Font property (Type, Colours, Alignment etc)

## 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

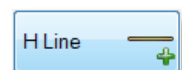
The Vertical Line Object places a Vertical line on the design window. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line. Vertical lines are repeated down the page for each record.



Double clicking on a line will open the [Line Properties](#) window.

## H Line

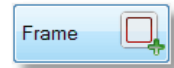
The Horizontal Line Object places a Horizontal line on the design window. You can use the mouse to click and drag for position, and by clicking and dragging on the ends of the line, you can re-size the line. Horizontal Lines are repeated for each record.



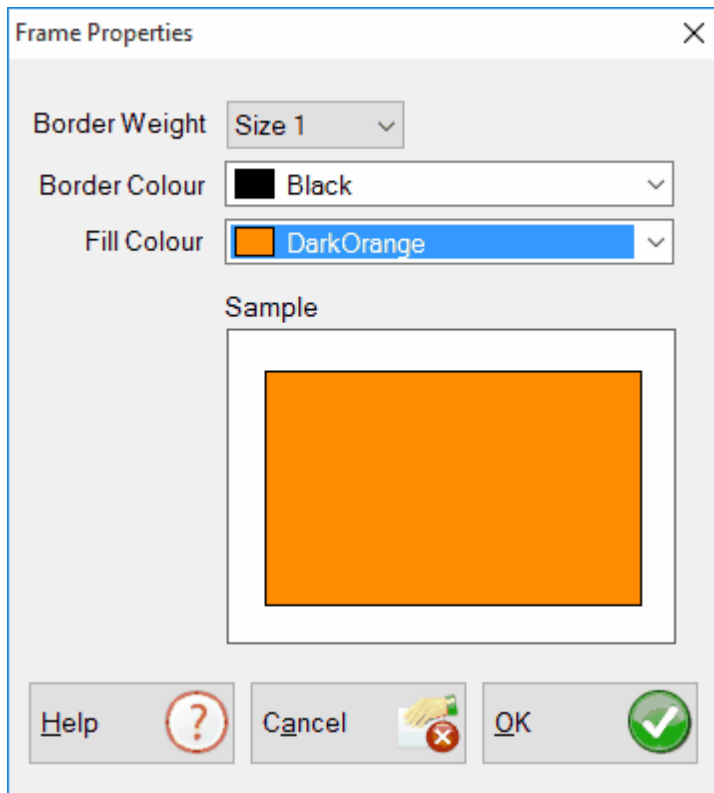
Double clicking on a line will open the [Line Properties](#) window.

## 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.

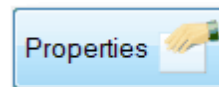


You can set Border Size and Colour, and Fill Colour for the Frame Object.



## Properties

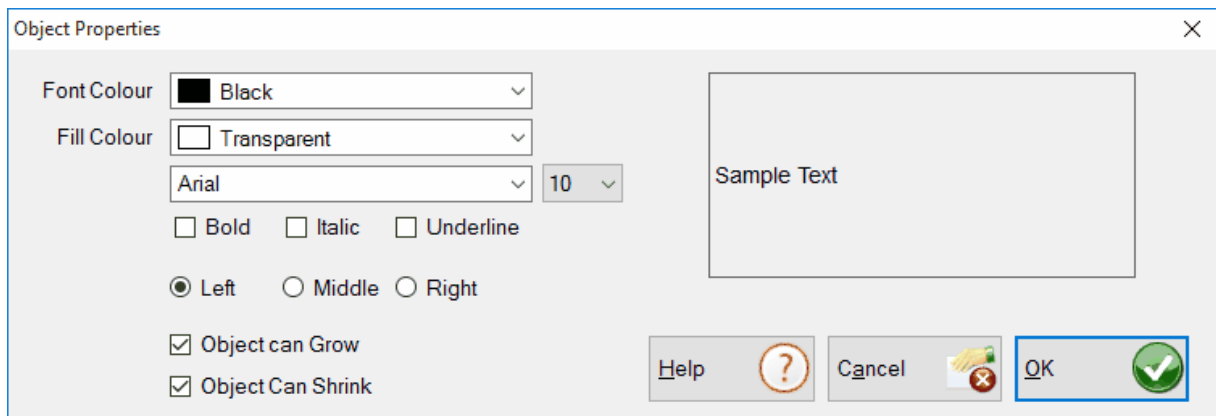
This section shows all Property windows for Custom Directory and Custom Report objects. To open a properties option window for any object, select that object and press the Properties Button, or double click on the object that you want to see the properties window for.



## 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.

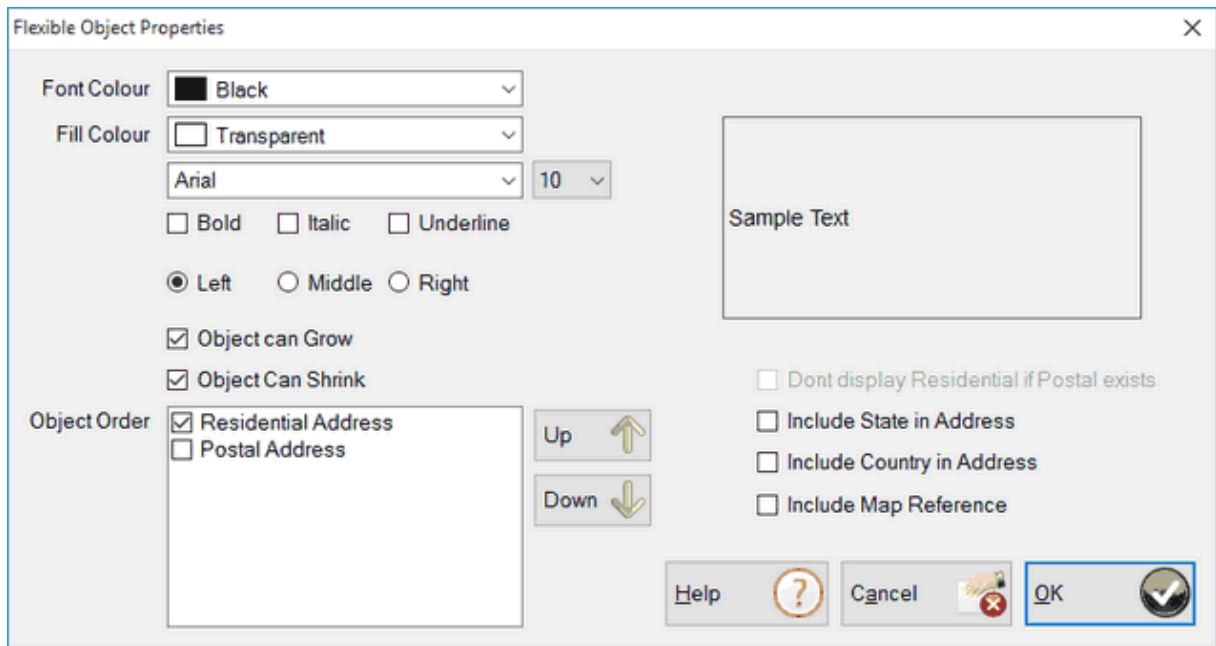
## Children's Names

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.

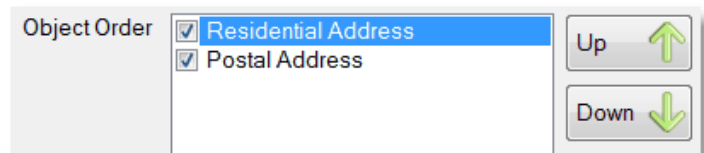
## Automatic Sizing Features

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.



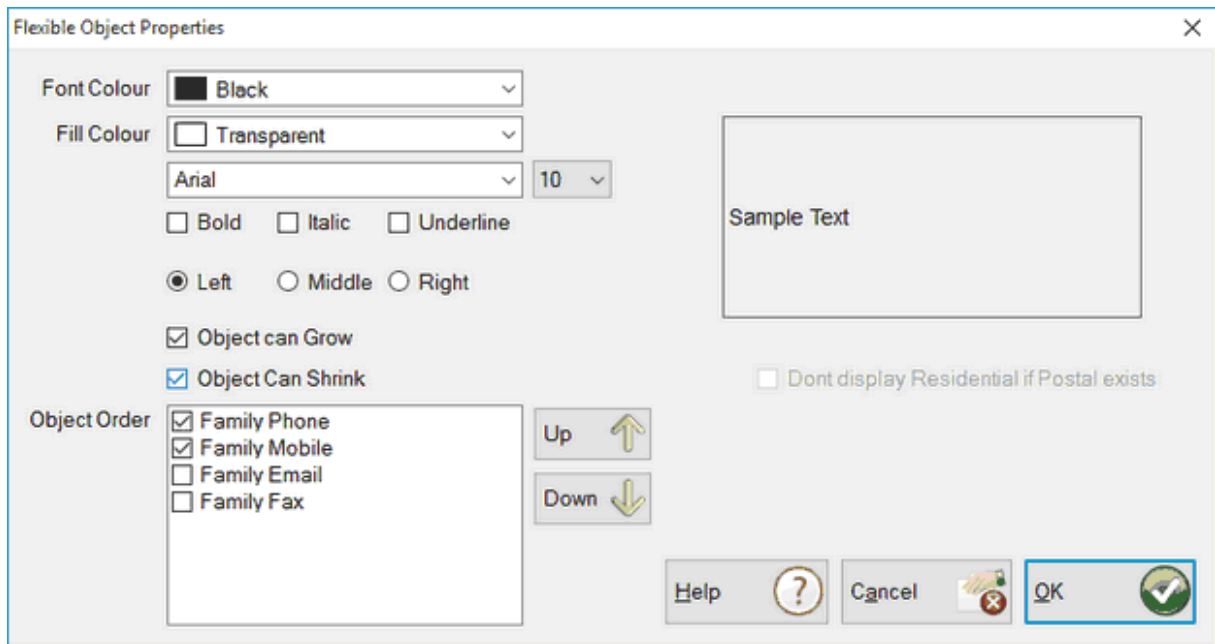
## Don't Display Residential...

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

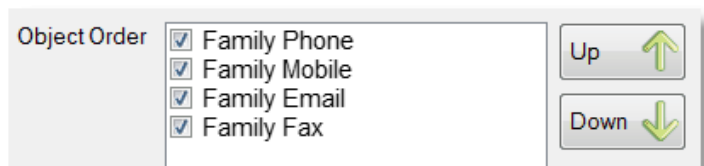
The best options are to leave **Can Grow** and **Can Shrink** ticked. This allows the data object to re-size itself in Height only as needed to either fit in more data, or to save space by closing up. See also [Saving White Space](#) for tips on good report design.

## 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 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.

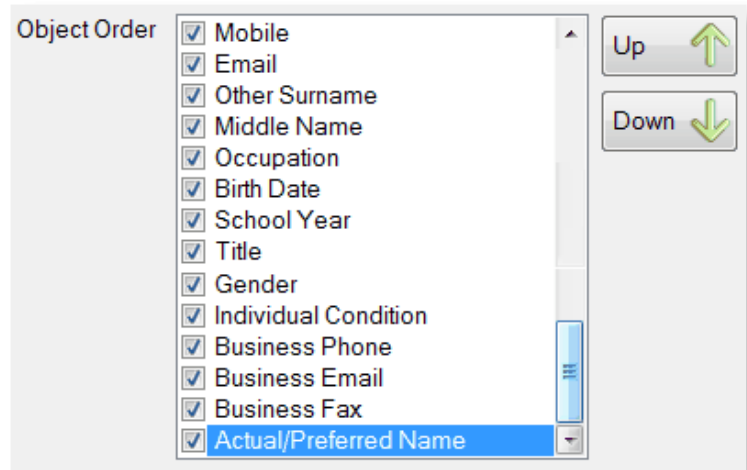
## Object Order

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.

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

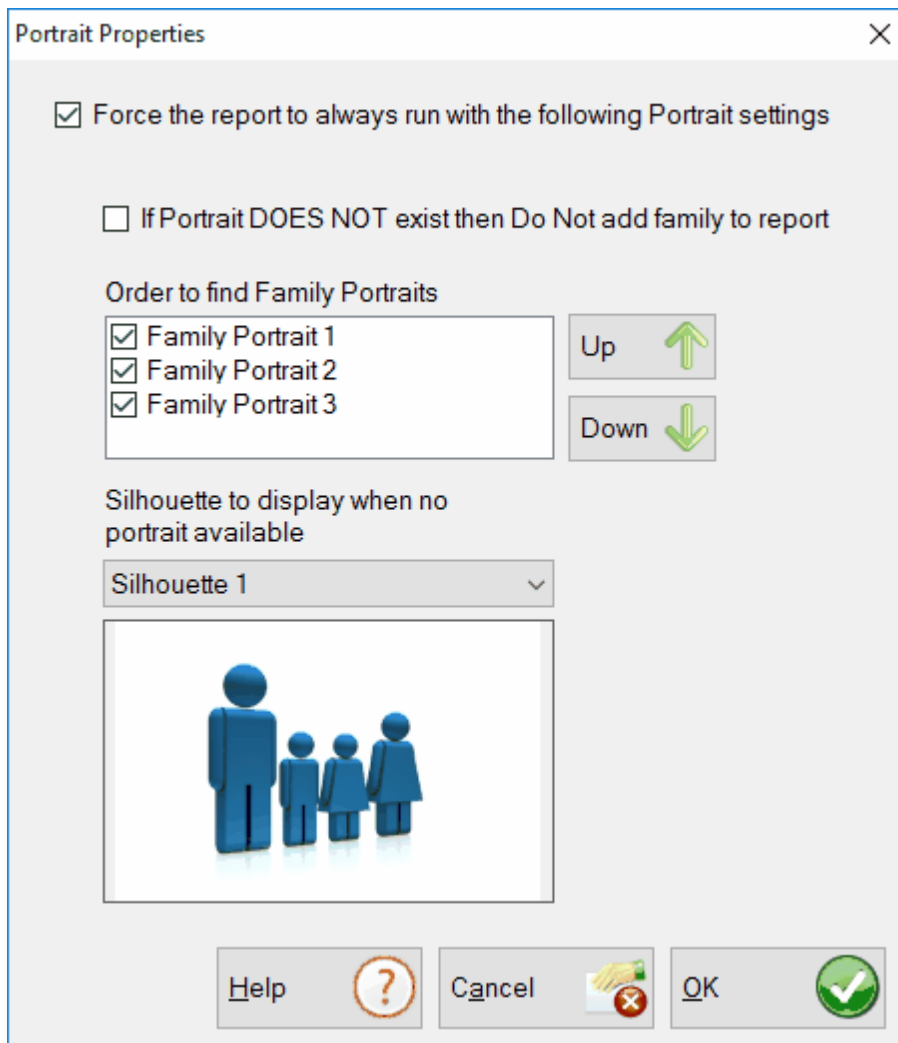
Mobile Phone:041234567890  
 Occupation:Retired  
 Birth Date:02/06/1965  
 Title:Rev.

## 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.



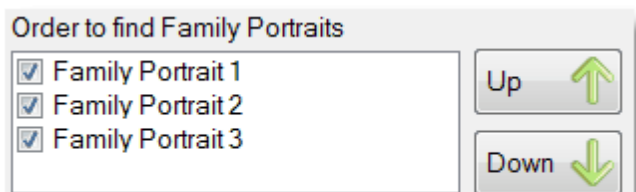
Tick this option to use settings on this window to override Pastoral Care default portrait controls, only however for the current template you are working on.

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

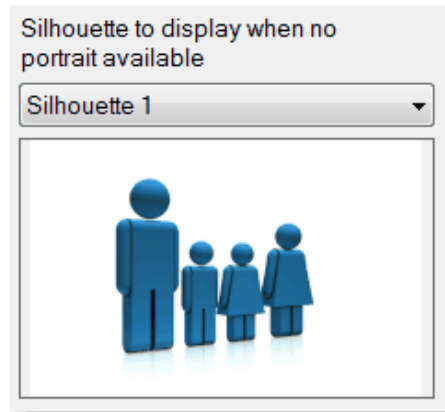
Manually adjust the Portrait Search Order for the current Directory or Report design. Having a Tick on a portrait item identifies to Pastoral Care that you want to use that Portrait in the output.



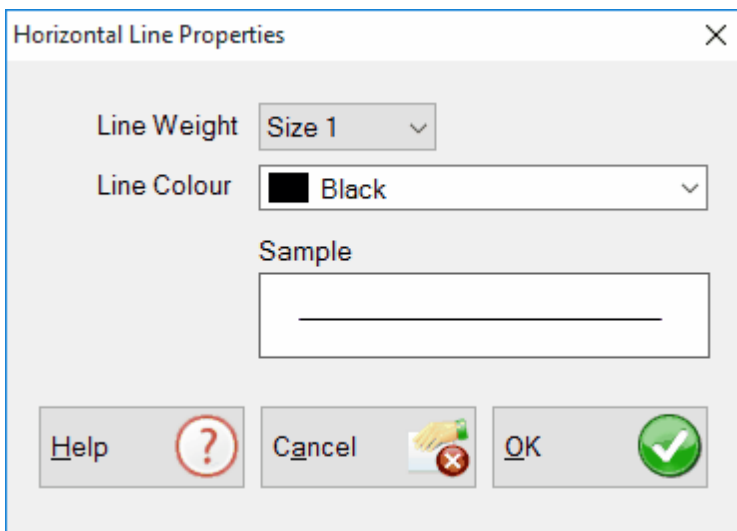
In the example above, when composing this object, Pastoral Care will first look for a

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.



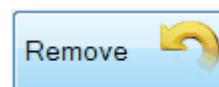
### Line Properties



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.

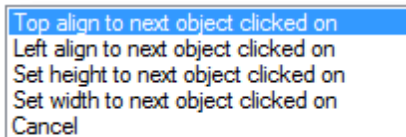
[Not Enough Options?](#)    [Right Click](#)

[Saving White Space](#)    [Selected Object](#)

[Sizing Objects](#)    [Moving Objects](#)

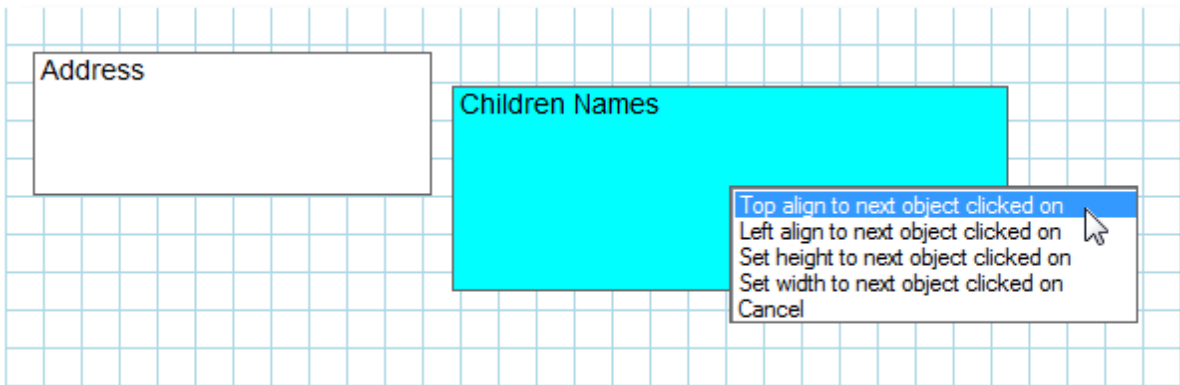
### Right Click

If you Right Click while your mouse pointer is over an object, the following pop up menu opens up.

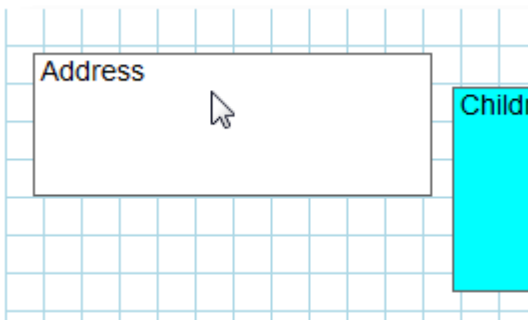


Each action described here will occur to the object that you right clicked on, in relation to the NEXT object you click. For example, if you now selected the first menu item of "Top Align to next object clicked on" and then you clicked on the address box, your Selected Object would move vertically only until the top of the selected box was in line with the top of the Address Box.

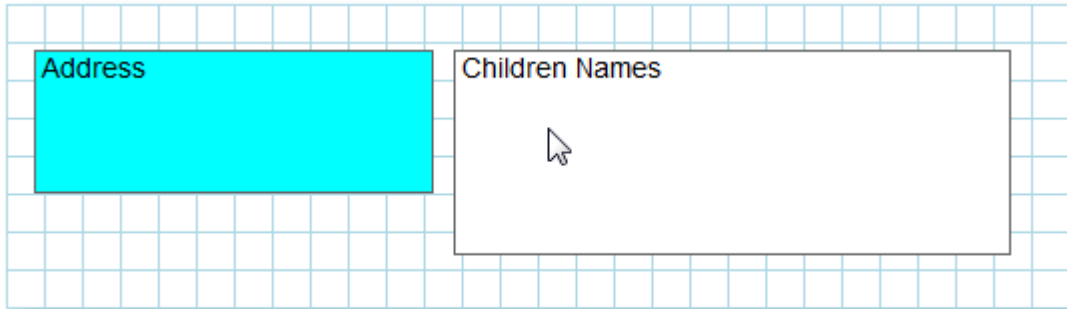
Here is a few visuals to show this. The picture below shows that you have Right Clicked on Children's Names, and you are about to left click on "Top align to next object clicked on"



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!

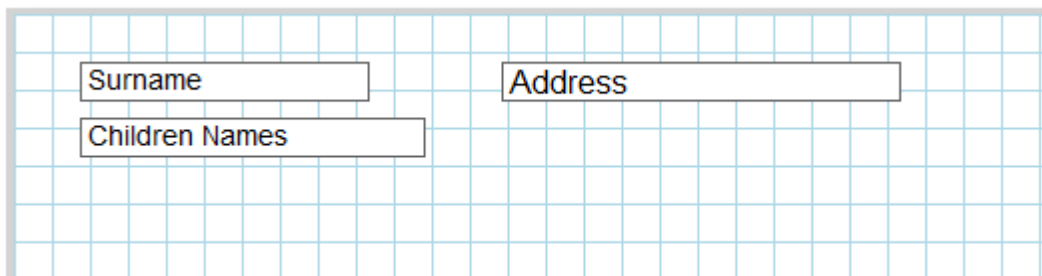


(Notice that Address is now Blue, this is because it is the last object selected, and is therefore the active object)

### 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	

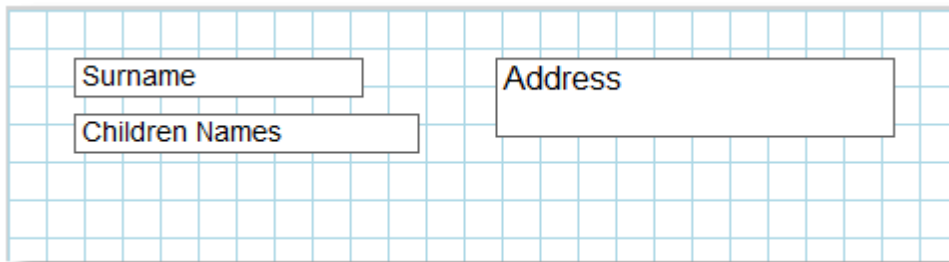
HOWEVER, because the Address Field and the Surname field are the same HEIGHT and are top aligned, even though Auto Grow and Shrink are turned on all 3 objects, the actual report looks like the following. Note the wasted space between the Surname and Childrens Name.

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:



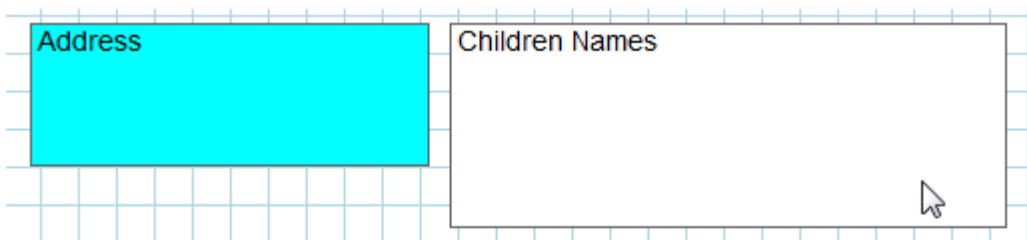
Now the address box overlaps into the Children's Names object, the custom report that is created behaves much better, and produces a report like the following:

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 it'self 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.



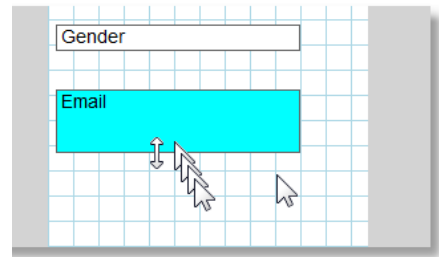
## Sizing Objects

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.

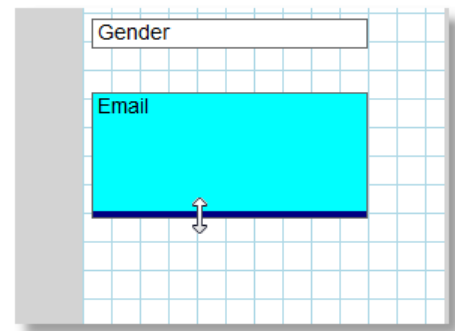
Sizing of an object can be done by using one of 2 methods. Use the mouse to drag an object border, or using the [Right Click](#) menu on an object to change it's size relative to another object. See [Right Click](#) for some shortcut sizing and alignment options.

### 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.

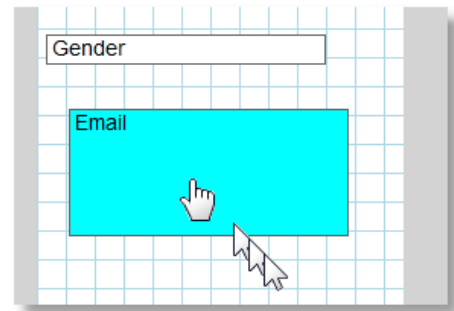
## Moving Objects

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.

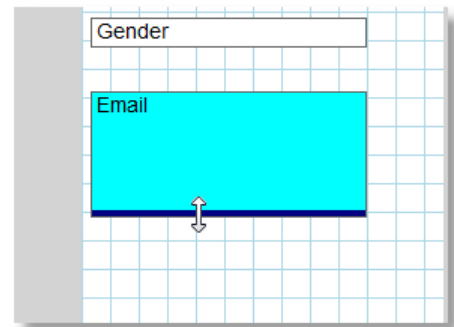
### Moving an object with the mouse



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 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
- Cover letter to members with the minutes of the AGM etc
- We missed you last week letter
- 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

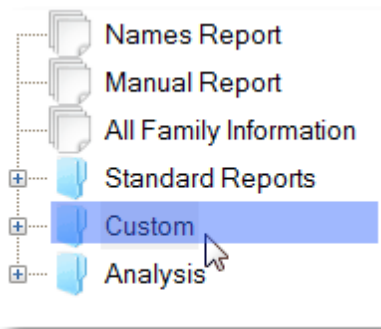
make any fine tuning / formatting changes, then go to [Create Reports](#) from the Explore Tab on the main menu to run your report (Custom Letter) See [Using Custom Letter](#).

## Using Custom Letter

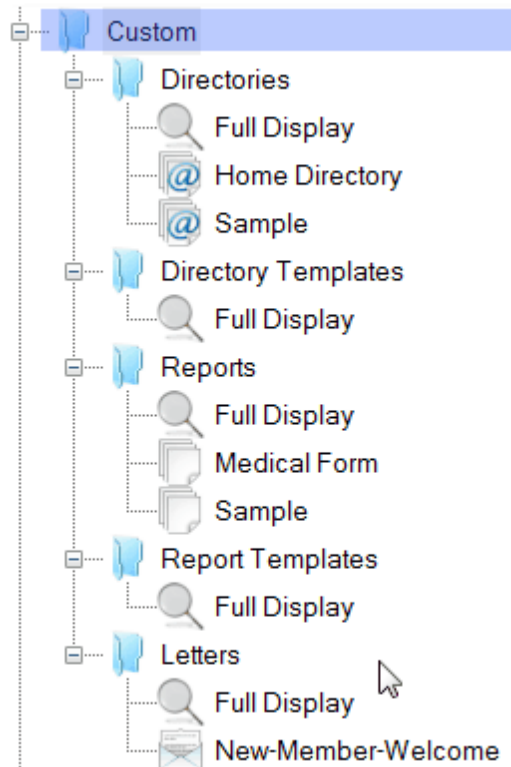
Designing your own custom letters is one thing, but how do you use them? When you create a Custom Letter, Pastoral Care adds them to the list of reports available throughout Pastoral Care.

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)

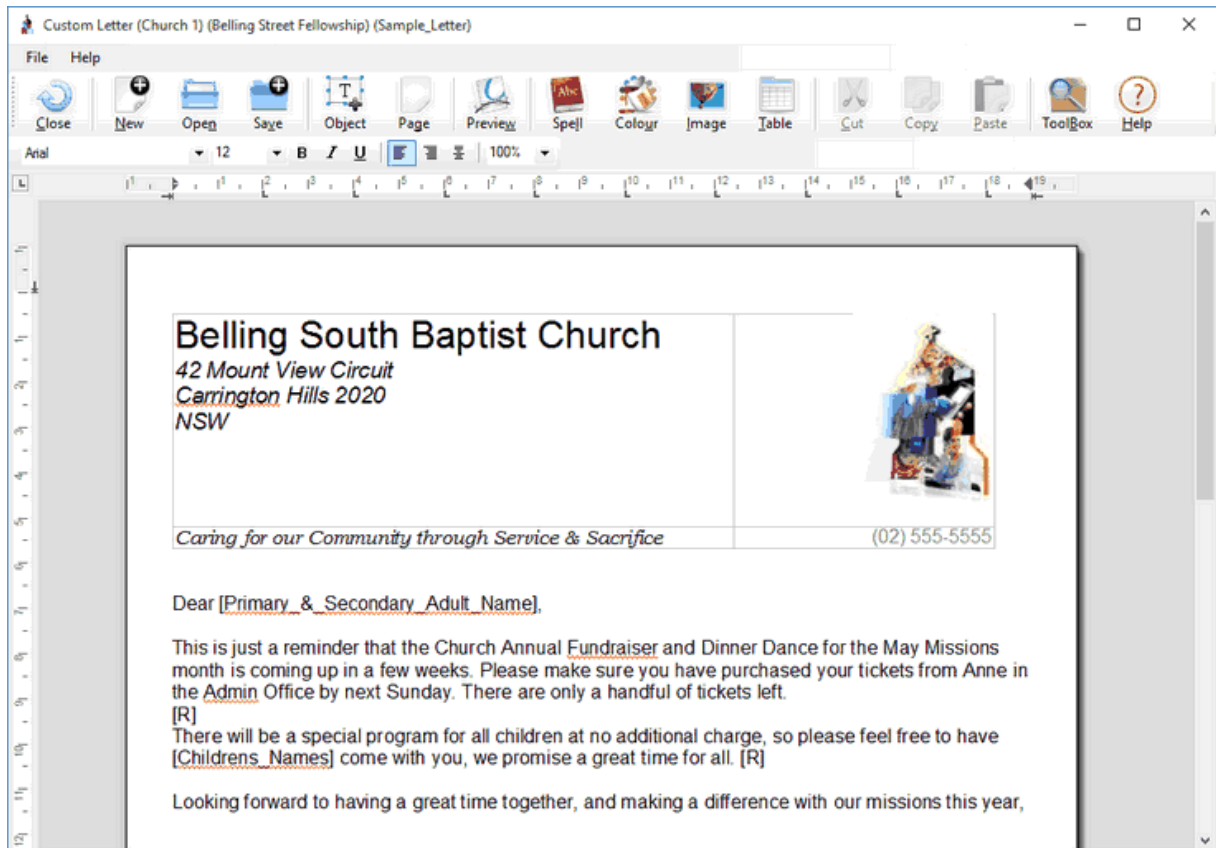


## Custom Letter Main Window

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.

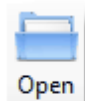
## New

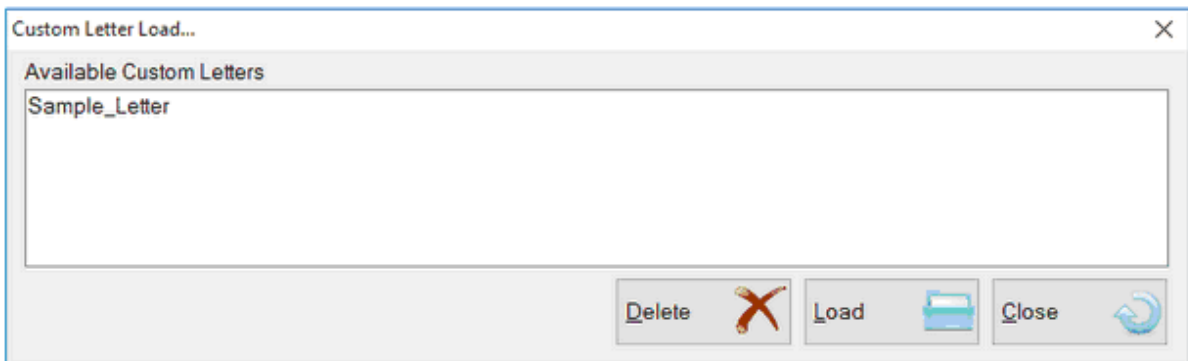
Press the New button to create a new blank Custom Letter ready to start typing again.



## Open

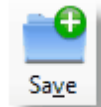
Press the Open button to show the Custom Letter Open window. (Shown below) If you have no more use for a particular letter you have written, simply select it in the list and press the Delete Button.



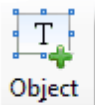


## Save

Press the Save button to save your new custom letter, or to save any changes to your letter



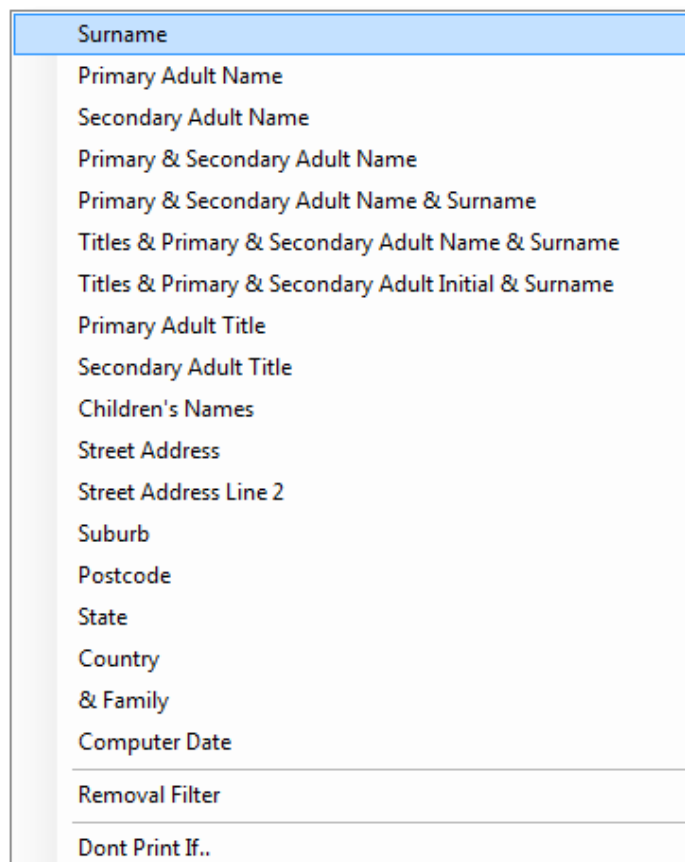
## Object



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 sits between two [R] entries, therefore this entire sentence will only appear in letters to families that have children.

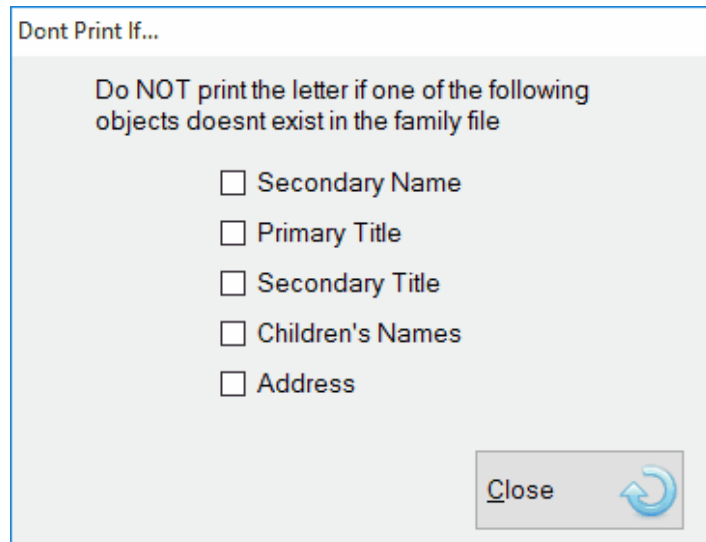
[R] There will be a special program for all children at no additional charge, so please feel free to have [Childrens Names] come with you, we promise a great time for all. [R]

## 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.

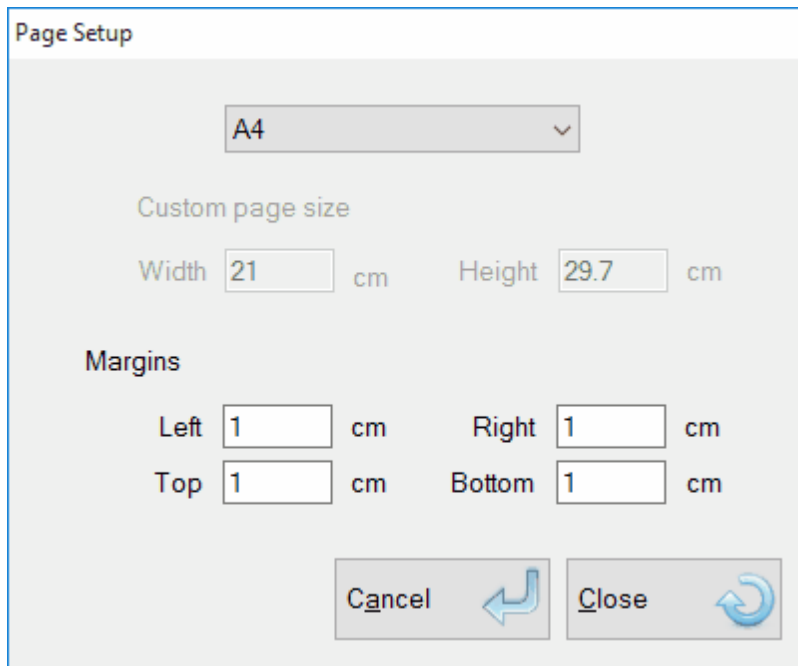
The Object List opens up either by clicking Object on the toolbar, or by Right Clicking on the letter where you wish to insert a field.

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.



Page Setup

A4

Custom page size

Width 21 cm Height 29.7 cm

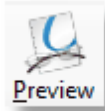
Margins

Left 1 cm Right 1 cm

Top 1 cm Bottom 1 cm

Cancel Close

## Preview

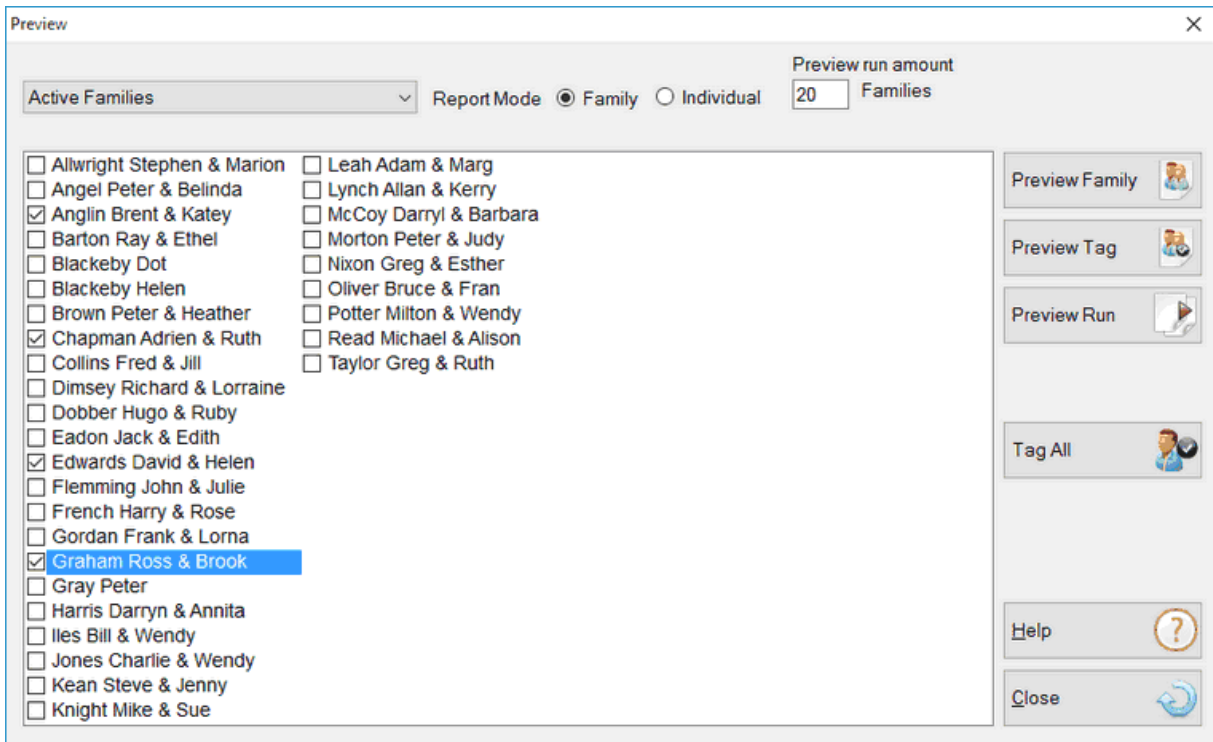


The Preview feature allows you to select a family, or a range of families / individuals for testing out your new Custom Letter. This is not the area to run your report from, rather it is just a preview / test drive.



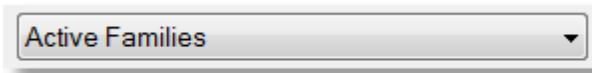
Click on each part of the Preview Window below to learn more about this feature.





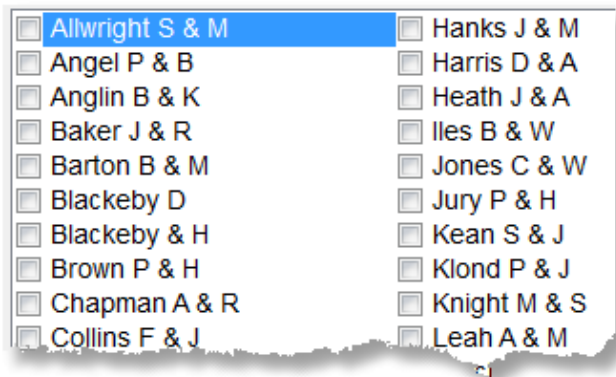
**Family Filter**

Select a Family Filter for running your preview on. For most people, Active Families as the default is perfect for this job!



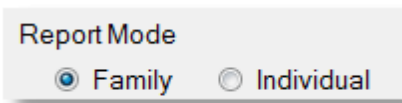
**Select Families**

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.



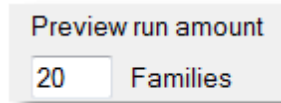
**Report Mode**

Choose to run your report preview in Family Mode, or Individual Mode.



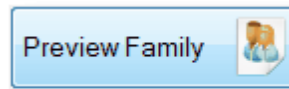
### Preview Run Amount

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.



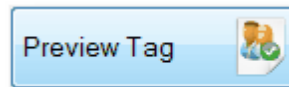
### Preview Family

Pressing this button will only run the selected report template on the currently highlighted (no Tagged) family.



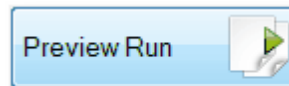
### Preview Tag

Pressing this button will only run the selected report template on the currently tagged (not highlighted) families.



### Preview Run

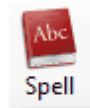
Press this button to let Pastoral Care preview the report template for the first x number of families it finds in your database.



### 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.



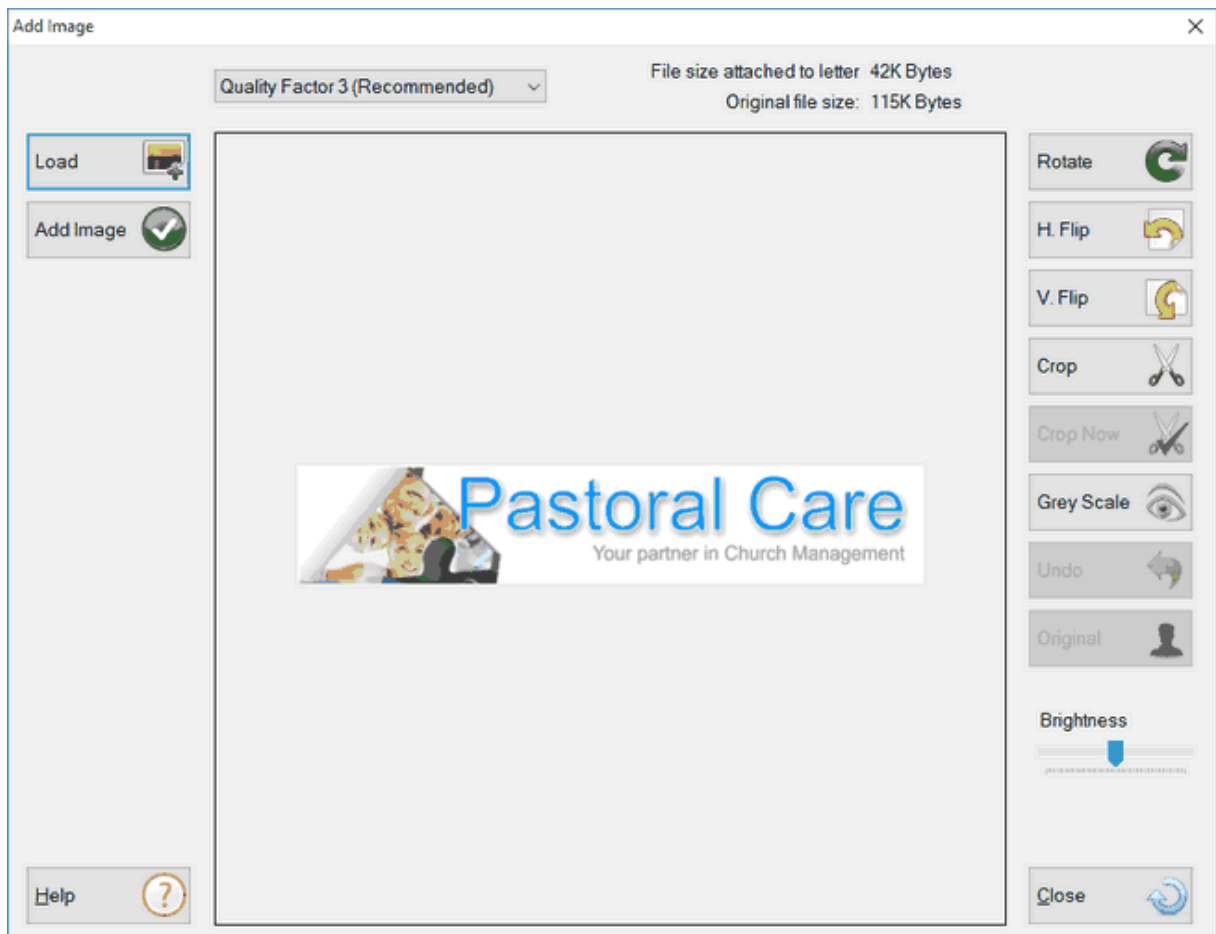
### Colour

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.



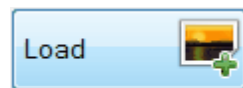
### Image

Shown below is the Add Image control window for adding an image to a Custom Letter. This is the same as adding images to other parts of Pastoral Care, you will find more information also at [Image](#) section of adding images to emails.



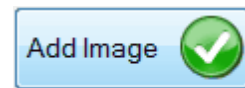
### Load

Load an image from a file to be added to the Custom Letter.



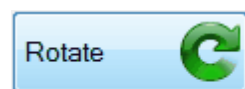
### Add Image

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.



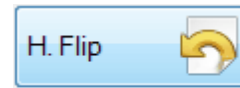
### Rotate

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

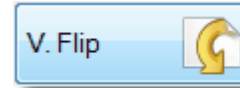


**H Flip**

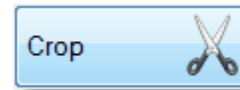
Flip the picture (mirror) horizontally.

**V Flip**

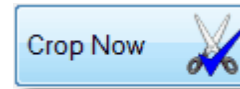
Flip the picture (mirror) vertically.

**Crop**

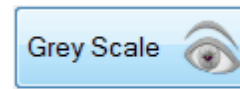
Select an area of the picture to crop.

**Crop Now**

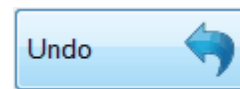
After marking an area with Crop, press the Crop Now button to complete the crop.

**Grey Scale**

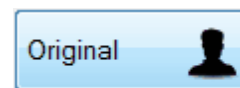
Convert the picture to grey tones only.

**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.

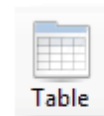
### Image Preview

This shows a preview of the selected image to be inserted in the email.



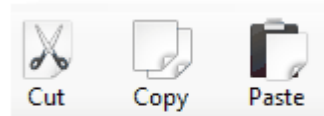
### Table

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.



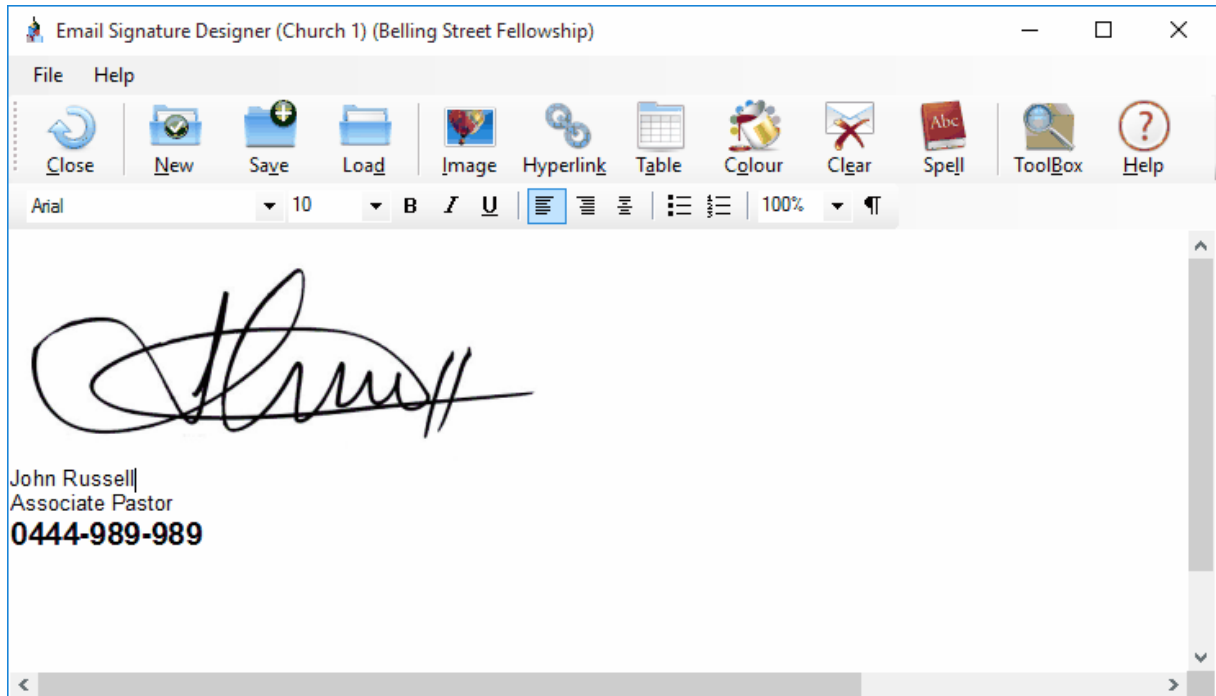
## Email Signature Designer

The Email Signature Designer is a feature that lets you create multiple signature files for use when sending emails.

This feature is accessible from the Main Menu - Utilities tab. See [Utilities Introduction](#)



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



[Creating Signatures](#)

### Creating Signatures

To create a signature, simply type the information you want, pressing Enter for each new line, then highlight and format your text as needed.

You can add Pictures and hyperlinks for added flexibility and usefulness.

When you have completed the look and feel of your new signature, press the Save button on the toolbar to save your file, and give it a useful name for use later on.

### Email Signature Toolbar

Shown below are all the buttons on the Email Signature toolbar.

Create a new Signature File



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

Save the current Signature File



Clear the current signature

Insert a Picture into the signature.



Access the Spell Checker Settings

Insert a Hyperlink in your signature



Load a pre-saved signature

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



Open the [Toolbox](#)

## 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.

- Lightening 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

**Backup To...**

Local Hard Drive

Browse (Choose a Location for backup)

USB Flash Drive

DropBox

**Backup with the Family Database...**

Global Data

Family Notes

Images

Email, SMS & Roster History


Audio Notes

**Local Hard Drive Backup Location**

Store in Pastoral Care Data Folder

Manually Select Location

Folder


 

**DropBox Setup**

Use default Dropbox folder (Recomended)

Manually Select Dropbox Folder

Dropbox Folder


 


**Backup Options**


Enable Backup option when Exiting Pastoral Care


Enable Auto Backup when Exiting Pastoral Care

Auto Backup after exiting this work station after  Times

Help 

History 

Backup 

Close 

### Backup To

Backup To...

Local Hard Drive

Browse (Choose a Location for backup)

USB Flash Drive

DropBox

Choose any of the 4 backup devices.

## Local Hard Drive

See [Hard Drive Location](#)

## Browse

Use Browse to allow you to choose the location that you want to backup to yourself.

## USB Flash Drive

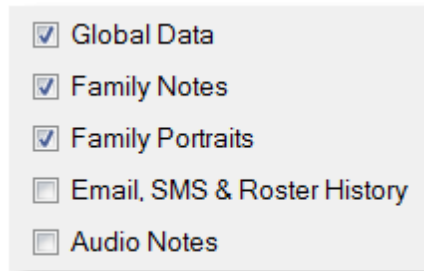
Use this option to allow pastoral care to automatically locate and select a USB flash disk. If you are having trouble using this feature, you can try the Browse option instead of this option.

## DropBox

Use this option to allow Pastoral Care backup to your dropbox folder. See [Drop Box Setup](#) for more information.

## Backup with Family Database

By Default, the minimum amount of information backed up is the family database. To backup everything, tick all options here.



## Hard Drive Location

### Store in Pastoral Care Data Folder

Automatically backup to the Pastoral Care backup folder. This can be found in:

C:\Pastoral\_Care\_Data\Pastoral\_Care\_14\_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.

Note, your network location will be different to C: if you are using networking.

## Manually Select Location


Use this option to manually select your default hard drive backup location

**Local Hard Drive Backup Location**

Store in Pastoral Care Data Folder

Manually Select Location

Folder



### Drop Box Setup


Select either the default dropbox folder, or manually select your dropbox folder. If you are using One Drive or another cloud drive, you can use the Manual option and browse to that folder to set it.

**DropBox Setup**

Use default Dropbox folder (Recomended)

Manually Select Dropbox Folder

Dropbox Folder



### Backup Options

Tick the option that best suits your needs.

Enable Backup when exit will prompt you to backup when exiting Pastoral Care

Enable Auto Backup will automatically back up each time you exit Pastoral Care, or at a frequency set in the Auto Backup After... option

**Backup Options**

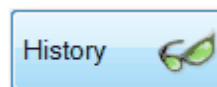
Enable Backup option when Exiting Pastoral Care

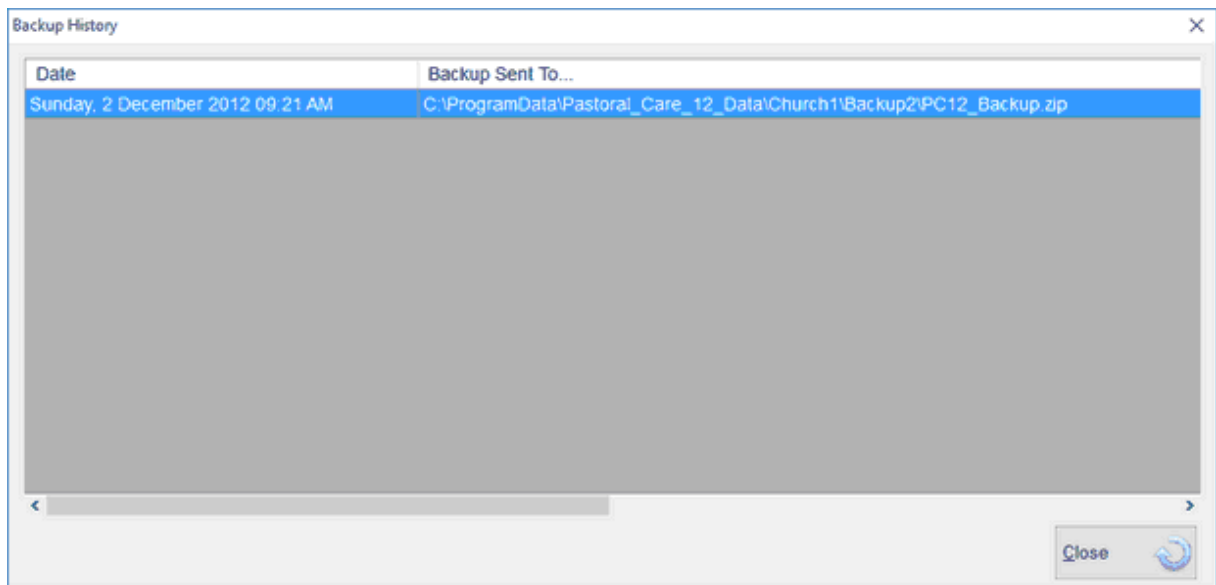
Enable Auto Backup when Exiting Pastoral Care

Auto Backup after exiting this work station after  Times

### History

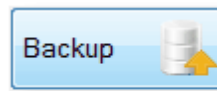
Press the History button to show the backup history.





## Backup

Press this button to carry out the backup process selected.



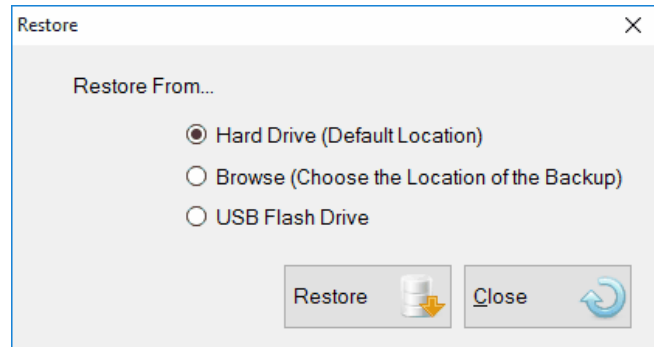
## Restore Data

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!

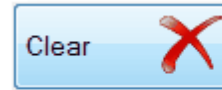
To complete a restore, simply select the device, and press Restore. Pastoral Care will direct you to locate the file and it will then complete the restore process.



## 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...

<b>Church</b>	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
<b>Status</b>	Remove all people from a selected status
<b>Individual Groups</b>	Remove all people from a selected Individual Group
<b>Ministry</b>	Remove all people from an Active or a Potential Ministry
<b>Medical</b>	Remove all people from a Medical Group
<b>Relationships</b>	Remove all people from a Relationship Group
<b>Individual Dates</b>	Remove all people from an Individual Date group
<b>Flexi Fields</b>	Remove all people from a Flexi Field group
<b>Occupation</b>	Remove all people from an Occupation
<b>Family Groups</b>	Remove all people from a selected Family group
<b>Family Dates</b>	Remove all people from a selected Family Date group.
<b>Roll</b>	Clear all roll records, or records between a set range of dates from a selected Roll project
<b>Financial</b>	Clear all Financial Records, or Financial Records between a set range of dates from a selected Financial project
<b>Weekly Statistics</b>	Clear all Weekly Statistics records, or Weekly Statistics records between a set range of dates from a selected Weekly project



## 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

- Leadership List
- Youth List
- All Church List
- Sample

Email List

- Leadership List
- Youth List
- All Church List

Secure export file with a password

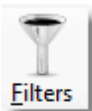
## Directory Export

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"/>	Gender
<input type="checkbox"/>	Middle Name
<input checked="" type="checkbox"/>	Other Surname
<input checked="" type="checkbox"/>	Birth Date
<input checked="" type="checkbox"/>	Residential Address
<input checked="" type="checkbox"/>	Postal Address
<input checked="" 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

Secure export file with a password

Include Portraits


<input checked="" type="checkbox"/>	Family Portrait 1
<input checked="" type="checkbox"/>	Family Portrait 2
<input checked="" type="checkbox"/>	Family Portrait 3
<input checked="" type="checkbox"/>	Individual Portraits

Include Pin Memo


Edit 'Pin Memo' 

Display 'Pin Memo' when 'Directory' starts

Include Notice

Edit 'Notice' 

Include Reports

Add Reports 

## 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

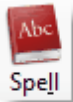
Tick this option to include a Notice for people to see who use the Directory Program. Press the Edit Notice button to write your notice to be distributed.

## 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.



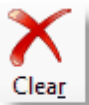
Access the Spell Checker Settings



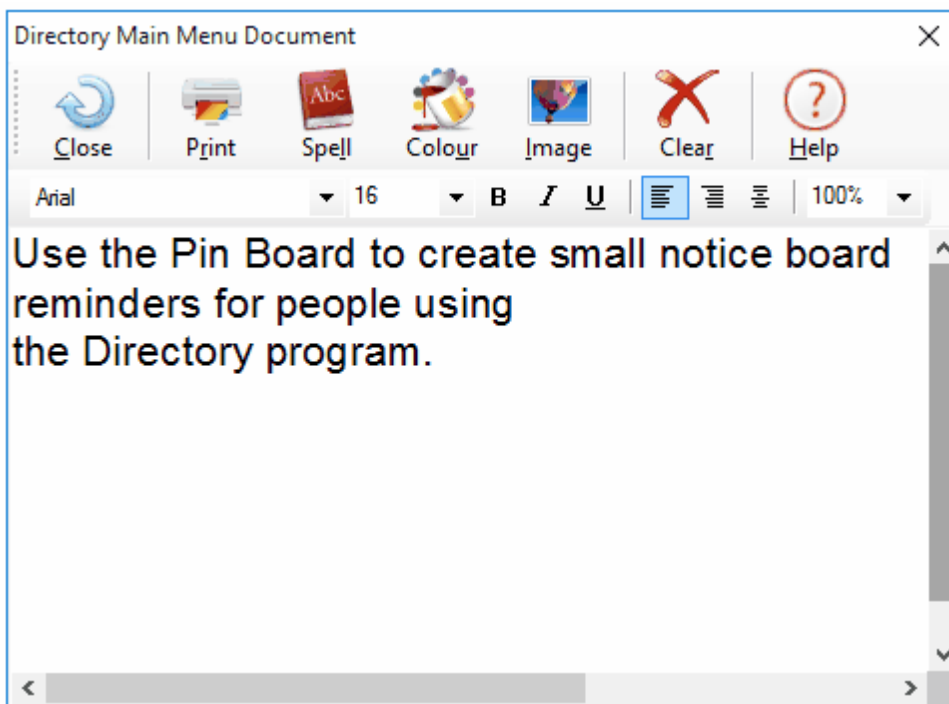
Set the Text and Text Background colours for the selected text.



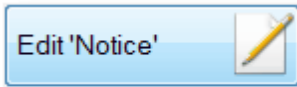
Use the Image button to load in a sizable image into the Pin Memo.



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



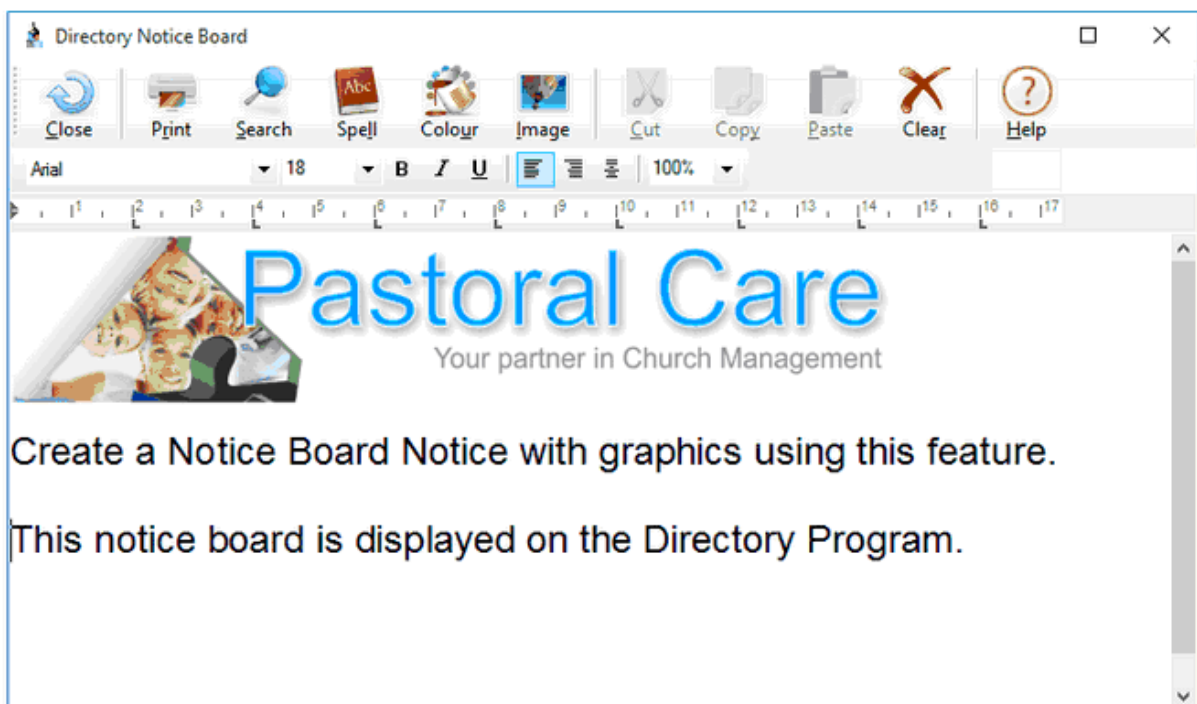
Use the Image button to load in a sizable image into the Pin Memo.



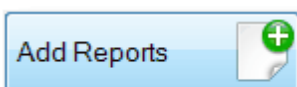
Access the Spell Checker Settings



Use the Clear button to totally erase the Pin Memo.

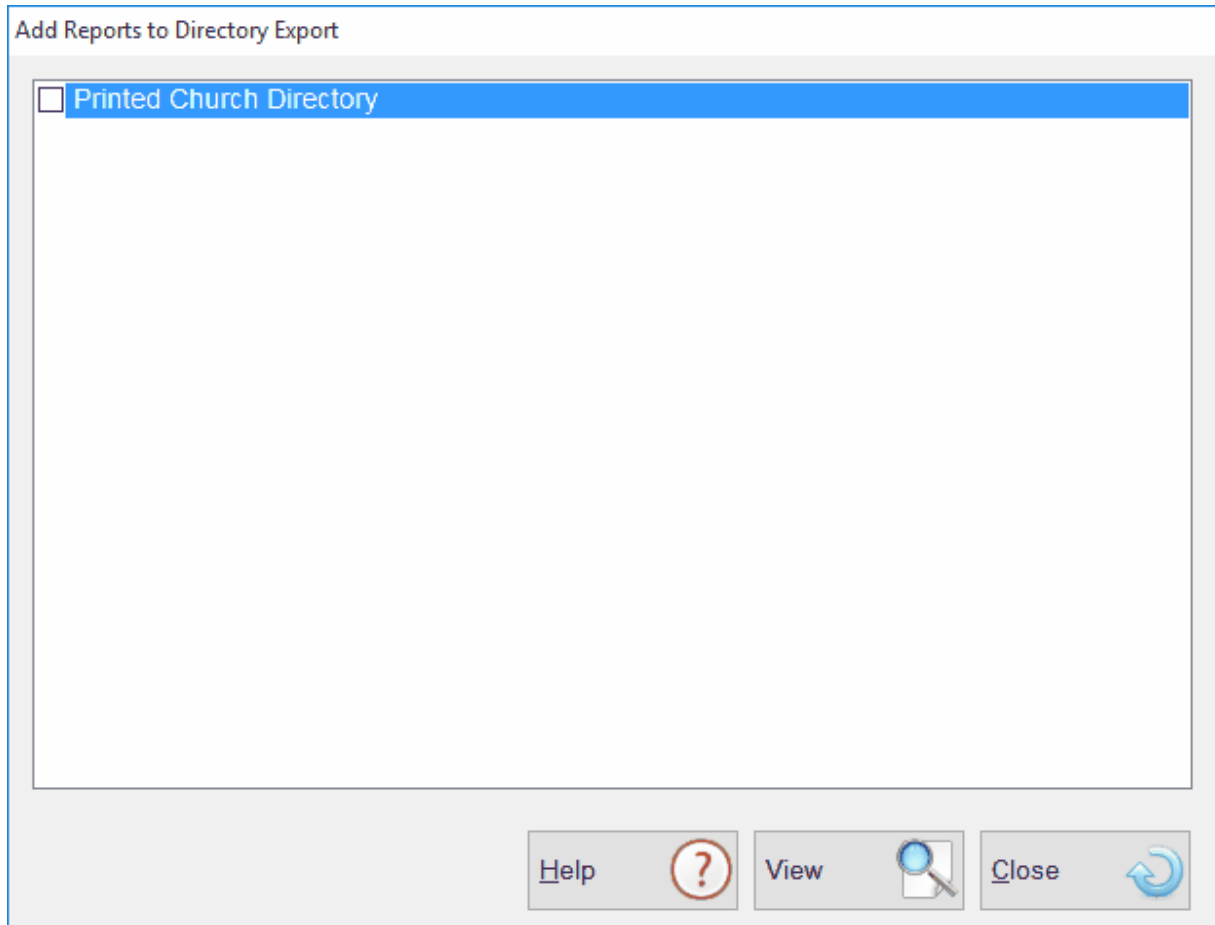


## Reports



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).

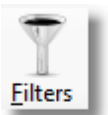


## Family File Export

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.

## 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.

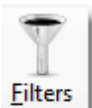
## Mailing List Export

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.

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

Financial Year      From

Date Range      To

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 suits your needs best. We suggest Comma and Quote Separator files for maximum reliability in general.

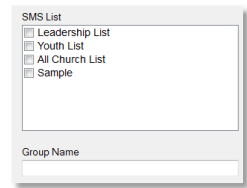
## SMS Global Mobile Upload File

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](http://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.



The screenshot shows a window titled "SMS List" with a list of four items, each with a checkbox: "Leadership List", "Youth List", "All Church List", and "Sample". Below the list is a text input field labeled "Group Name".

## Smartphone

### Introduction

Pastoral Care Smartphone utility (found on the Utility Tab) is a simple utility that lets you export selected contact data to a format that is designed to be imported directly into Google Contacts.

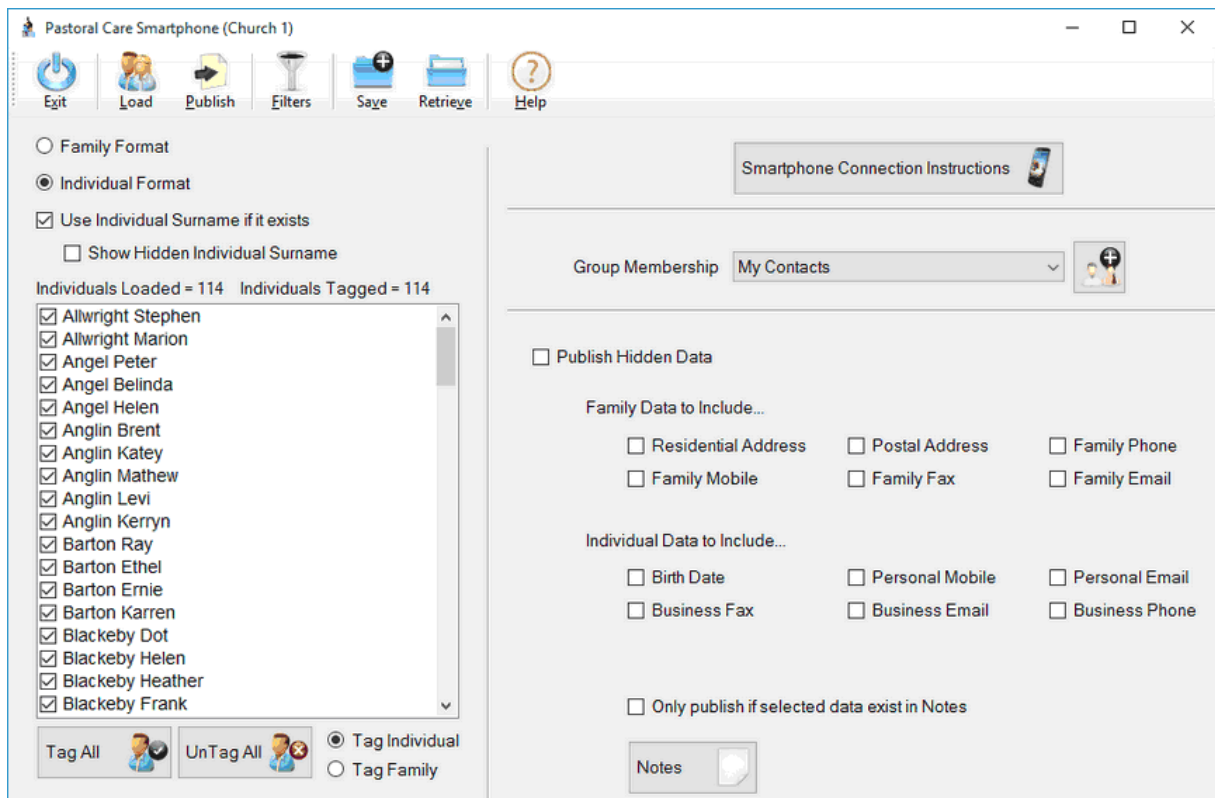
Once your data is in Google Contacts, you can access this information for referral from any internet connected device using either a web browser via google, or link your google contacts account with your smartphone by adding the account as a contact account on your Android or Apple smartphone.

### Privacy

Please be aware of privacy concerns and issues when you hand out access to the smartphone feature of adding a whole load of church data onto peoples mobile phones. Make sure that the access is appropriate and that you have permission from your church for the collection and use of data on portable devices.



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

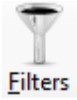


## Load



Press the Load Button to load in all people, or selected people that may have filtered for.

## Filters



Press the Filters button to use the standard Pastoral Care filters to narrow your search for people from selected segments.

See [The Filters Window](#) for full details on the use of Filters.

## Save



Press Save to save the current settings as a template for uploading again. Please note, all Google contacts must be deleted from your Google Account before you upload an updated list.

## Retrieve



Press the Retrieve button to load back in a saved setup.

## Publish



Press this to create your CSV text file for uploading to Google Contacts.

## Format

Select which format you want your contact information to export in. Family Mode, or Individual Mode.

Individual mode will create a contact for each person, and family mode will create one contact for each family.

- Family Format
- Individual Format
- Use Individual Surname if it exists
- Show Hidden Individual Surname

## Smartphone Connection Instructions

Smartphone Connection Instructions



Press this button to see a detailed step by step guide on how to setup your smartphone.

## Names List

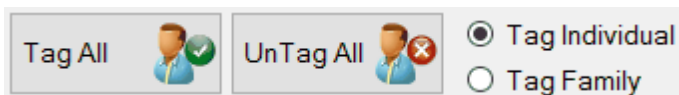
Tag (tick) the people you want to export for your Google Contacts account.



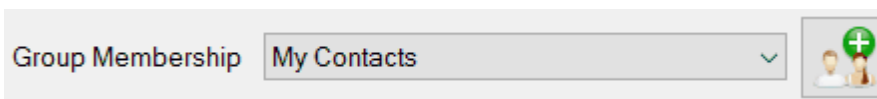
## Tag - Untag

Use the Tag All to tag all people or the UnTag All to untag all people.

If Tag Individual is selected, each time you tag a person, only that person is tagged. If Tag Family is selected, each time you tag someone, the entire family is tagged.



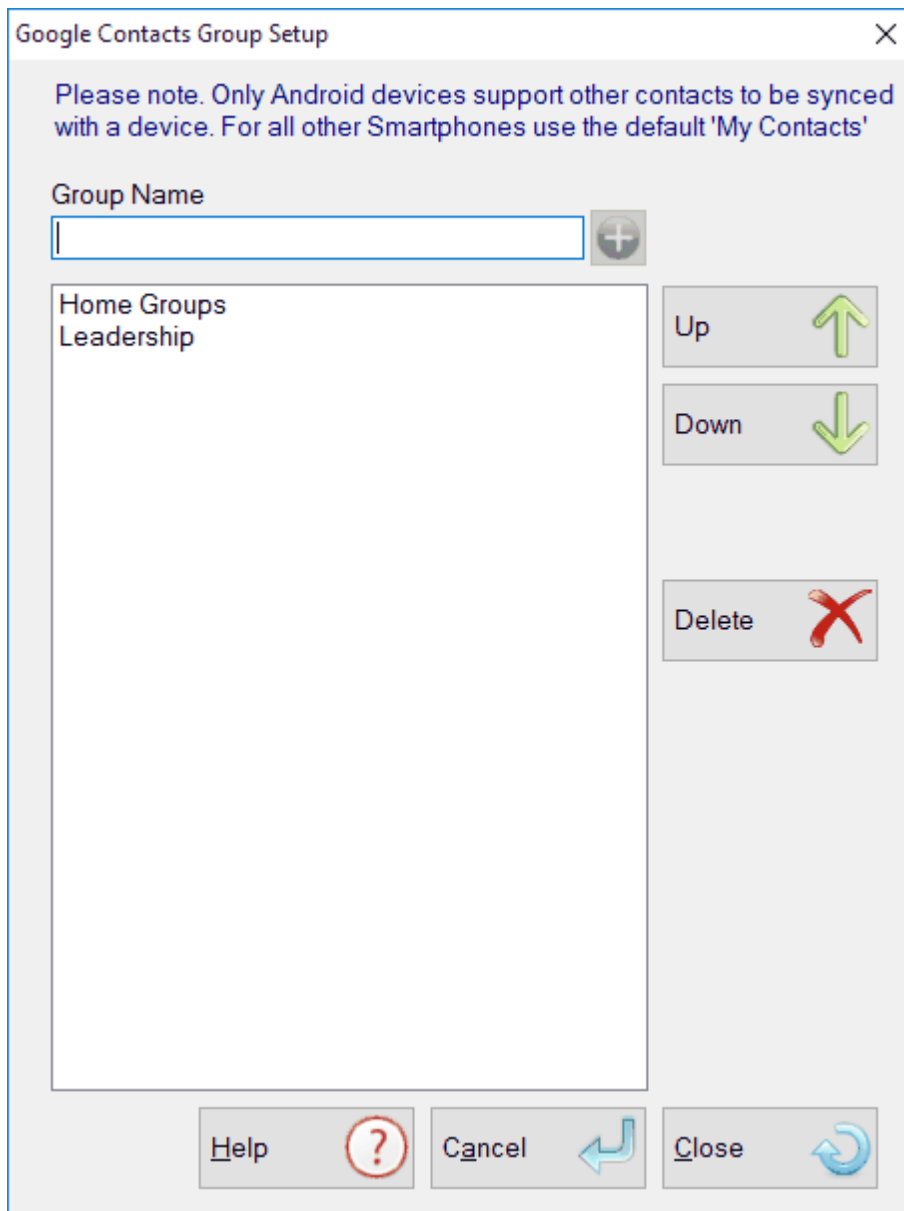
## Group Membership



If you are using an Android for your mobile device, you can create different groups, and these are passed through correctly to your android phone. If you are using an Apple Phone, you must use the default setting of My Contacts.



Press this button to access the Create Group window shown below.



## Include Additional Data

Tick the extra fields that you want to export to Google Contacts. Where possible, most of these fields will translate to an existing or newly created field in Google Contacts to match. Ticking Publish Hidden Data will override individual hidden fields.

Press [Notes](#) to access even more data that can be published to the contacts Notes Field.

Publish Hidden Data

Family Data to Include...

Residential Address     Postal Address     Family Phone


Family Mobile     Family Fax     Family Email

Individual Data to Include...

Birth Date     Personal Mobile     Personal Email

Business Fax     Business Email     Business Phone

Only publish if selected data exist in Notes

Notes 

## Notes

All the fields here can be ticked to be added to the contacts "Notes" field on your Google Contacts.

Notes Field Data

Family Condition     Individual Condition     Gender     Family File Edited

Family File Created     Title     Other Surname     School Year

Middle Name     Preferred/ Actual Name     Occupation

---

Status     Relationship     Family Group     Family File Memo

Individual Groups     SMS Lists     Other Contacts     Family Visitation Notes from NoteBook

Ministry     Email Lists     Family Events     Family General Notes from NoteBook

Medical     Visitation     Personal Notes from NoteBook

Pre Visit Notes

Post Visit Notes

last Visitation Record

Individual Dates

Membership  Baptised  Confirmation

Flexi Fields

Elder

Family Dates



Wedding Date  Contact Date

---

Additional Comments

At the Start of Notes

At the End of Notes

Date Filter  26  



## Date Alerts

### Introduction

The Date Alerts utility can be found on the Utility Tab from the main menu of Pastoral Care. This utility lets you setup / define alerts for selected dates / events.

ON the Utilities tab you will find Date Alerts. To add a date for an alert, select the date, enter the number of days warning you want for the alert, and tick the conditions you want to include. (Active, Privacy, Prospect etc). Then press the ADD button to add the selection to the Active Alerts.

Alerts are shown on the **main menu** in the lower left corner of the window, and also on the [Dashboard](#).

Date Alerts
×

#### Available Date Alerts

Date	Type
Birth Date	Individual
Membership	Individual
Baptised	Individual
Confirmation	Individual
Christened	Individual
Wedding Date	Family
Contact Date	Family

Alert Within  
  
 Days

Add

Remove

Individual

Active

Privacy

Prospect

Archived

Contacts

Deceased

Family

Active

Privacy

Prospect

Archived

#### Active Date Alerts

Date	Type	Days
Birth Date	Individual	14
Wedding Date	Family	14

Alerts are notified when Pastoral Care starts up and are then displayed in the Alerts area within the Dashboard.

Help 
Close

## Upload Data

### Introduction

From time to time, Pastoral Care software can run into problems. These can be issues with your computer, your network, information stored in your database or perhaps a programming problem at our end! In any event, sometimes we need to see your information or log onto your computer to effect a timely repair. The Upload Data feature on the Utility Tab will assist us with this troubleshooting process.

### Privacy

Naturally the information you send us is kept in the strictest of confidence, and is deleted from our server once we have completed the repair. Information sent to us via this facility is secure, and cannot be used by other people to access your personal information. We also will never share your information with any other third party.

### Getting Help

Your first port of call is to go to our web site and click on Support, then Help Desk. Fill in a ticket and we will be in contact with the next step.

If requested to receive your data, simply fill in the form (shown below) that is accessed via the Utility - Upload Data area from the main menu, enter a password that we will send you, and press Upload.

If we need to remote work on your computer, we will step you through the Remote Support steps.

**Upload Family Data Files to the Pastoral Care Server** ✕

If your data causes an error within Pastoral Care this upload service is available so we can assist you to obtain a solution. Before uploading your data you must be provided with a password from the Pastoral Care Help Desk.

<p>Given Name <input style="width: 90%;" type="text"/></p> <p>Surname <input style="width: 90%;" type="text"/></p> <p>Church Name <input style="width: 90%;" type="text"/></p> <p>DayTime Phone <input style="width: 90%;" type="text"/></p> <p>Mobile <input style="width: 90%;" type="text"/></p> <p>After Hours Phone <input style="width: 90%;" type="text"/></p> <p>Email Address <input style="width: 90%;" type="text"/></p>	<p style="font-size: small; color: #000080;">If the error occurred while using Email or SMS then you need to send this error report from the computer that the error occurred on so Pastoral Care can pick up the appropriate log files.</p> <p style="font-size: small; color: #000080;">Only choose the following options if the error occurred in these areas.</p> <p><input type="checkbox"/> Upload Family Notes with Database</p> <p><input type="checkbox"/> Upload Family Portraits with Database</p> <p><input type="checkbox"/> Upload Email, SMS &amp; Roster History</p> <p><input type="checkbox"/> Upload Audio Notes</p>
---	---

Detail Description of the steps to create the problem

Remote Support

Password to Upload Data

Help
Upload
Close

# **Chapter**

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**10**

***Setup Tab***

## Setup Tab

### Setup Introduction

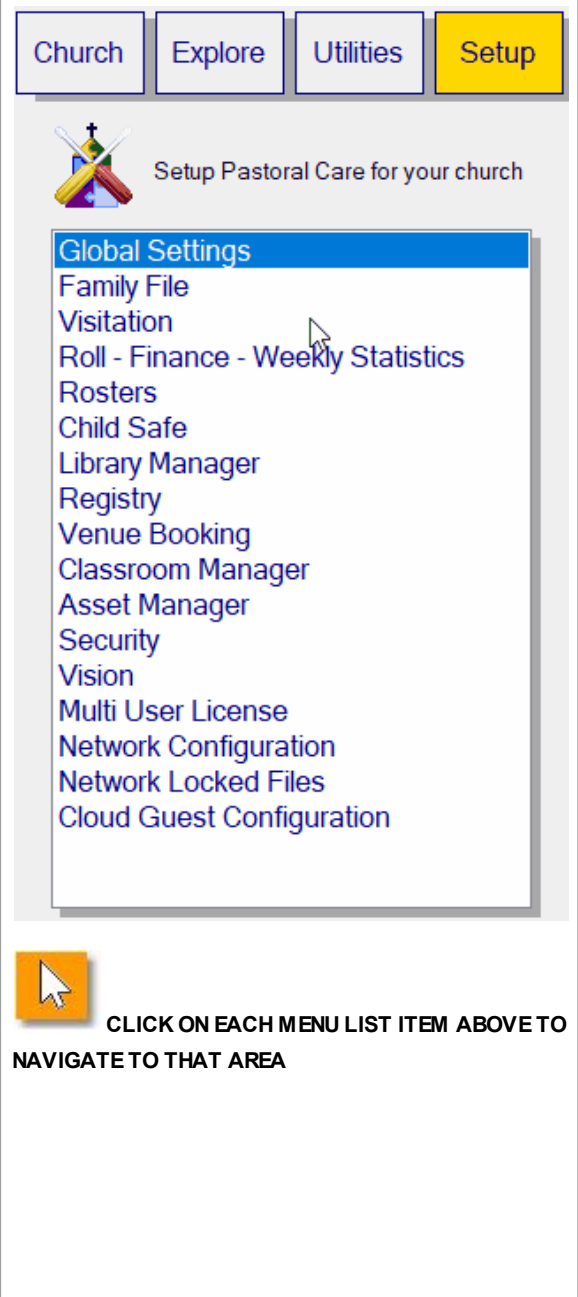
Pastoral Care can be configured to suit just about any church organisation. Before you use Pastoral Care, you should take the time to really think about how you manage people on your church, and how you would like to improve this if possible.

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.



Church Explore Utilities Setup

Setup Pastoral Care for your church

- Global Settings
- Family File
- Visitation
- Roll - Finance - Weekly Statistics
- Rosters
- Child Safe
- Library Manager
- Registry
- Venue Booking
- Classroom Manager
- Asset Manager
- Security
- Vision
- Multi User License
- Network Configuration
- Network Locked Files
- Cloud Guest Configuration

CLICK ON EACH MENU LIST ITEM ABOVE TO NAVIGATE TO THAT AREA

## Setup - Global

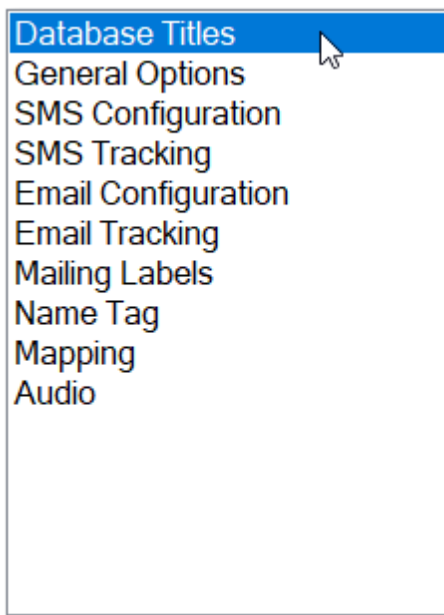
The Global Setup area (Previously Called Global Database Variables) allows you to setup areas of Pastoral Care that affect the overall operation and configuration of Pastoral Care 14.

You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)

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

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.

It is NOT recommended to use different databases for people who may appear in more than one database. This will cause confusion down the track and lead to multiple copies of the same information potentially getting out of sync. The example below shows a Scout Group being managed separately to the church. If most of the scout group do not attend church, then this is an appropriate usage of different databases within Pastoral Care.

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.

Address Format  Australia  New Zealand

Compact Pastoral Care database after entering the program  times

Default Report Formatting  Family  Individual

Set default path for exporting reports from the Report Viewer

Export Folder 

Main Menu Tab active, Family File data active & Child Safe Tabs Colour & Registry Toolbar selection

Disable portraits at Main Menu, Roll & Finance

Filter Decease, Archive, Prospect from Address book and Custom Previews

Disable Splash Screen Fading

Render Reports - Mode 2

## 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

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.

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.

## 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

Changing the colour here will change the colour of the Main Menu main tab buttons, the Tab Buttons in Child Safe 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.

### Address Book Filters

Tick this option to auto hide all Deceased, Archive and Prospects from the Address Book and custom report previews.

### 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.

### Report Rendering

In some cases, Pastoral Care may error when rendering larger reports. If you are getting a report error, try this option instead.

### SMS Configuration

Pastoral Care allows you to send SMS text messages easily and cheaply with integrated features that work with [www.msglobal.com](http://www.msglobal.com)

You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)

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

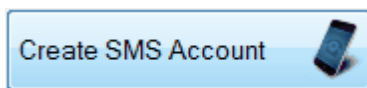
For first time setup follow these simple steps.

1. Press the Create SMS Account button in the SMS Setup Area.
2. A Web Page should open to [www.msglobal.com](http://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](http://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:

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.

## 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.


You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)



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](#) 

Outgoing SMTP Mail Server:  [Common Providers](#)

Server Authentication Required

Username:

Password:

Mail Authentication Required

Mode: Auto Detect - Highest to Lowest Search

Auto Detect Port & SSL

Enable SSL Mode

SSL Mode: [ ]

Port:

Disable 'Chunking' (For MsExchange Servers Only)

Your Email Address:

Your Name:

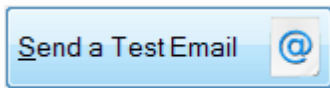
Activate Email Delay

After  emails delay sending by  Seconds

Individual Email 'To:' Restriction

Maximum amount of email addresses per email

Enable Sender Details before sending email

**Test Email**

Press this button to manually send an email to test.

**SMTP Server**

SMTP Server:  [Common Providers](#)

**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.

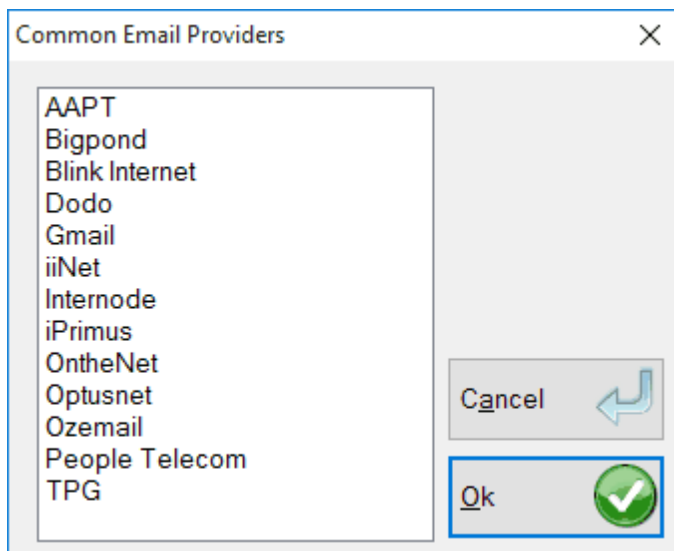
If you are not using proxy server as your internet access controller you can try any of the following settings for SMTP address:

IP Address of your domain server (eg: 192.168.1.19)

Your Domain Name (angelbaptist.com.au)

## Common Providers

Press the Common Providers to select from a list of common Email Server settings for the SMTP server field.



## 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.

## Enable Sender Details

With this option checked, Pastoral Care will let you modify the Sender Details before sending an email.

Enable Sender Details before sending email

## 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.



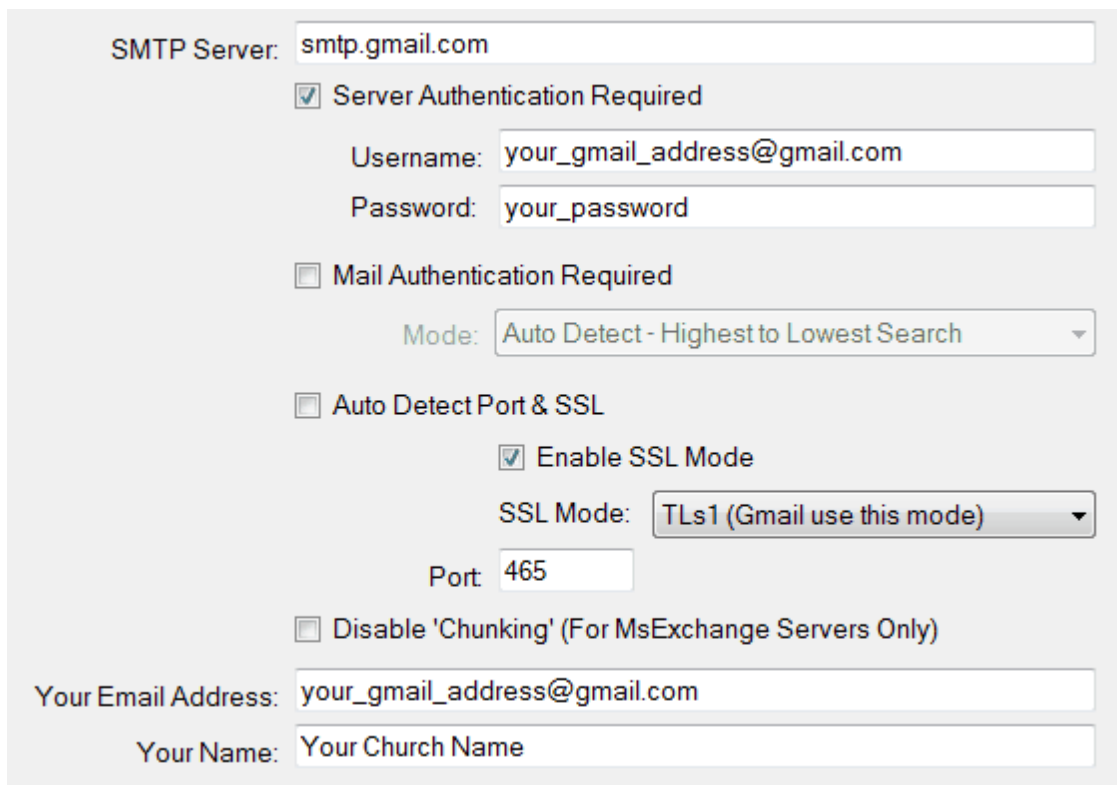
## Avoid SPAM black listing

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 SMTP configuration window. 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

## 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

Avery 54A


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 

Up 

Down 

Delete 

Preview 

Avery 54A  
Avery 55A

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

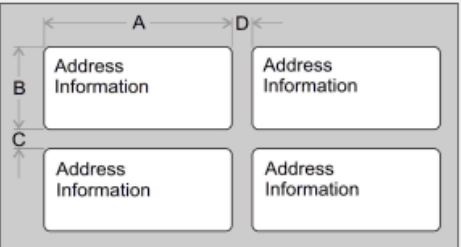
Name Setup  
Font Arial 10  
 Bold  Italic  Underline  
Colour Black

Address Setup  
Font Arial 10  
 Bold  Italic  Underline  
Colour Black

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



## 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.

Include title with names

Use Primary Adult's name only eg. Mr & Mrs Stephen Brown

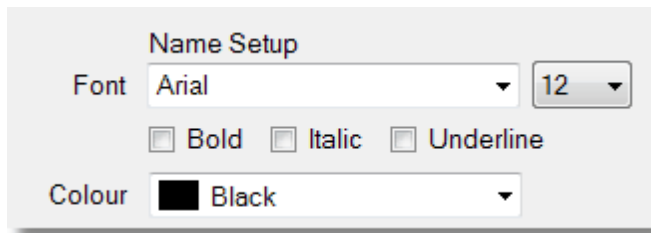
Print '& Family' if children exist

Use initial only for given name

Print labels with address

### Name Setup

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.

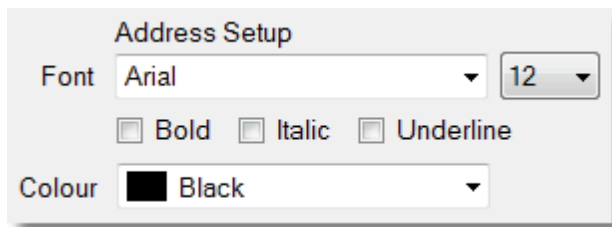


The Name Setup dialog box contains the following controls:

- Font: Arial (dropdown menu)
- 12 (font size dropdown menu)
- Bold
- Italic
- Underline
- Colour: Black (dropdown menu with a black color swatch)

### Address Setup

Set the Font properties for the Address part of the label.

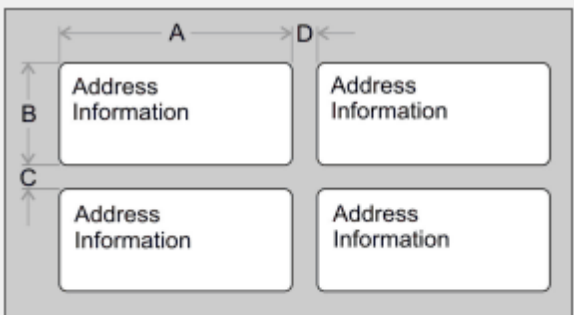


The Address Setup dialog box contains the following controls:

- Font: Arial (dropdown menu)
- 12 (font size dropdown menu)
- Bold
- Italic
- Underline
- Colour: Black (dropdown menu with a black color swatch)

## 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



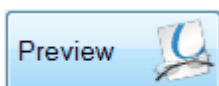
Sort the list of Mailing Label profiles. The setup you have at the top of the list will be the default setup used when printing Mailing Labels.

## Delete



Delete the selected Mailing Label setup.

## Preview

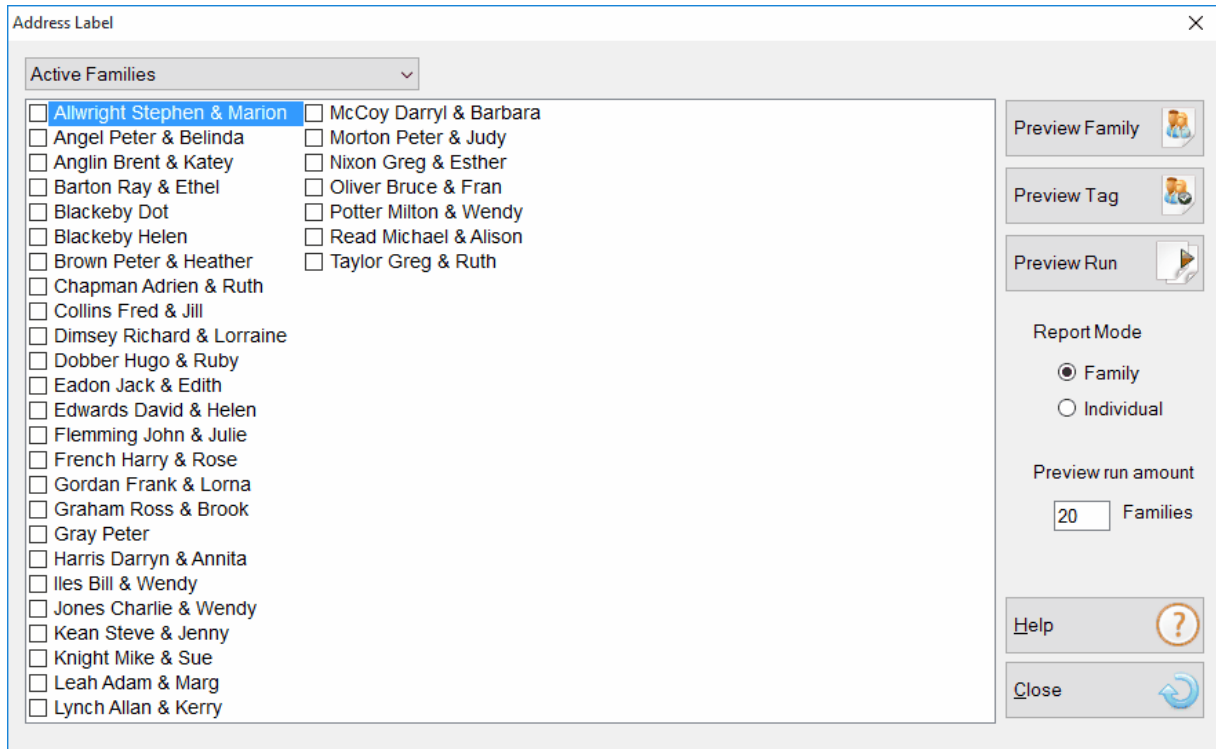


Use the Preview Option to test run the label setup. The quickest way to test run is to enter

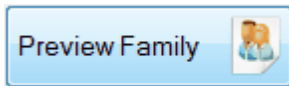
a number of families in the Preview Run Amount box and press Preview Run. This will select that number of families to output to the report viewer for printing.



Click on each area of the screen below to learn more about the Preview Mailing Label feature.

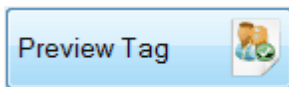


### Preview Family



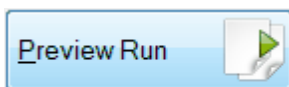
Press the Preview Family button to preview a single Family. The family that will be displayed on the report will be the highlighted family.

### Preview Tag



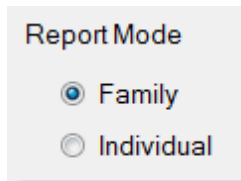
Press the Preview Tag button to preview all families that have been Tagged in this window.

### 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

A dialog box titled "Report Mode" with two radio button options: "Family" (selected) and "Individual".

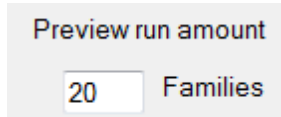
Report Mode

Family

Individual

Choose to run the label report as an Individual Address Label, or as a Family address label.

### Preview Run Amount

A dialog box titled "Preview run amount" with a text input field containing "20" and a label "Families".

Preview run amount

20 Families

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

A text input field containing "Smal Std" and a blue "+" button to its right.

Smal Std

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 +

Up ↑

Down ↓

Delete ✗

Logo 🌀

Preview 🖨️

Large Std  
Small Std

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

B

C

Name Tag Information

Labels across the page  1  2  3

A 80 mm

B 40 mm

C 2 mm

D 2 mm

Left margin within label 2 mm

Top margin within label 2 mm

Page top margin 10 mm

Page left margin 5 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

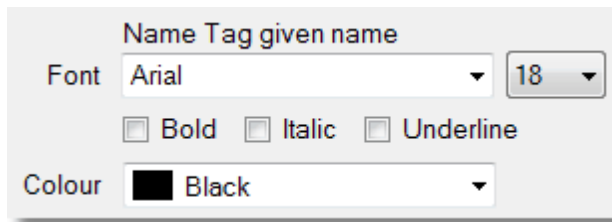
Centre Name Tag Text top to bottom

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

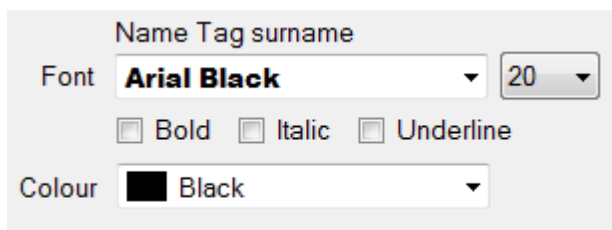
Font Arial 18

Bold  Italic  Underline

Colour Black

### Surname Setup

Set the Font properties for the Surname part of the Name Tag.



Name Tag surname

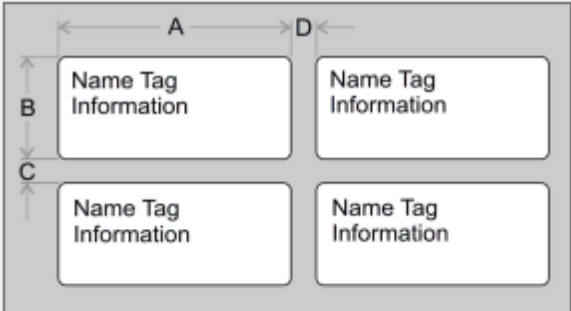
Font **Arial Black** 20

Bold  Italic  Underline

Colour Black

### Label Size / Position

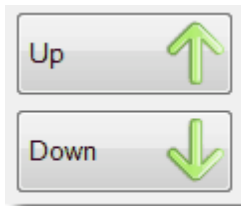
Use the measurements of your specific Name Tag to setup your Name Tags to print out correctly. Refer to the diagram showing dimensions A,B,C and D as a reference for setting the size and position correctly.



Labels across the page  1  2  3

A	<input type="text" value="90"/>	mm
B	<input type="text" value="50"/>	mm
C	<input type="text" value="5"/>	mm
D	<input type="text" value="5"/>	mm
Left margin within label	<input type="text" value="5"/>	mm
Top margin within label	<input type="text" value="5"/>	mm
Page top margin	<input type="text" value="15"/>	mm
Page left margin	<input type="text" value="5"/>	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.

### 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.

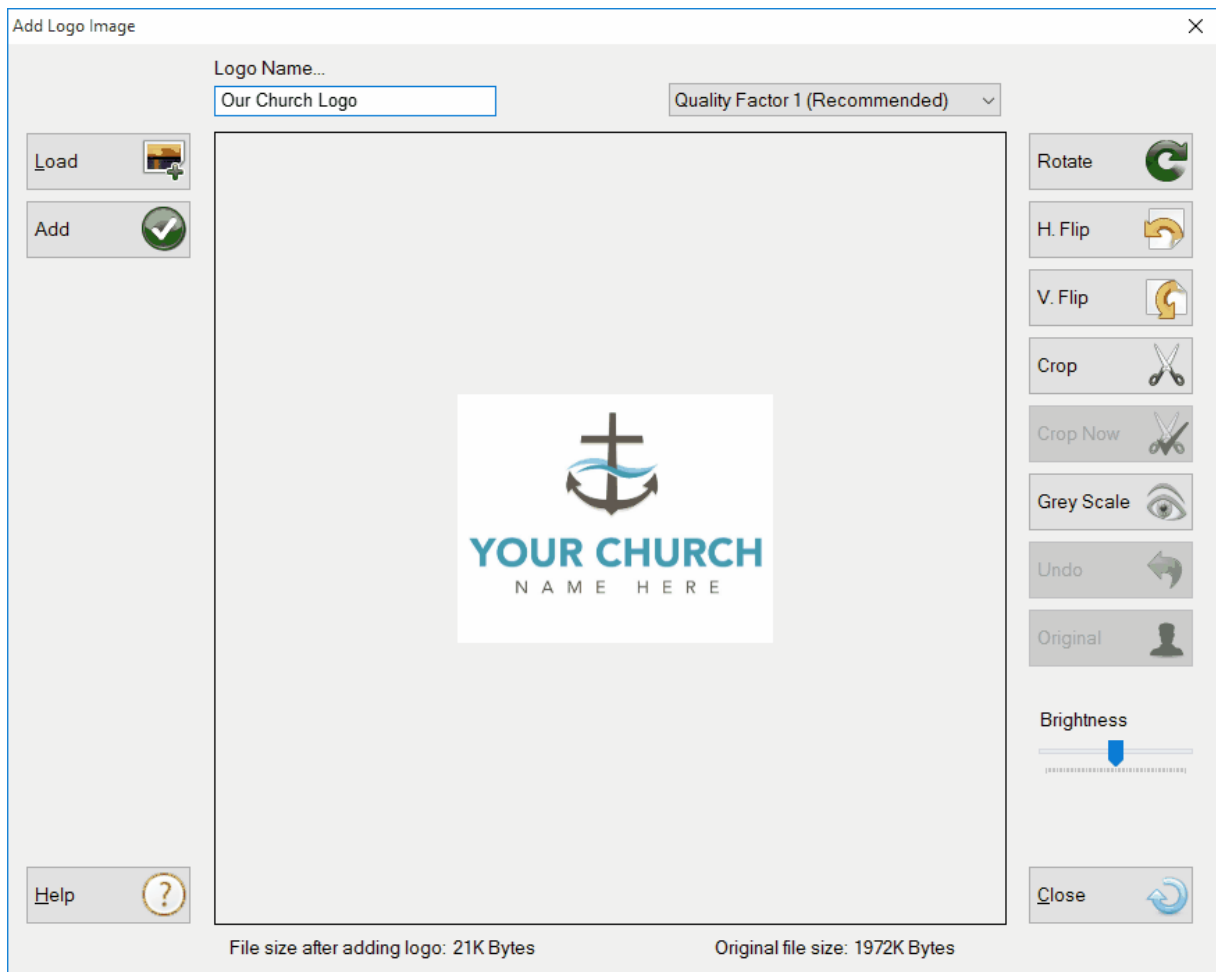
### Add



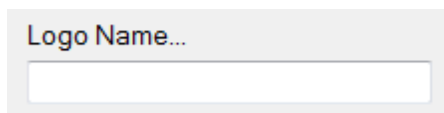
Press the Add Button to add a Picture file as an available Logo for use in Pastoral Care. The following Add Logo image control window is opened allowing you to load, manage and save a logo for use in Pastoral Care.



Click on each part of this window for more information.

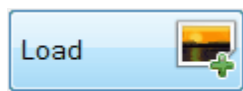


### Logo Name



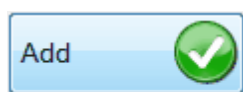
Give your logo a name that people will recognise in Pastoral Care.

### Load

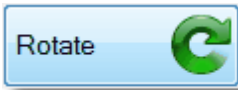


Press the Load Button to select an image to preview in the Name Tag Logo area, allowing you to further edit it before saving for use in Pastoral Care.

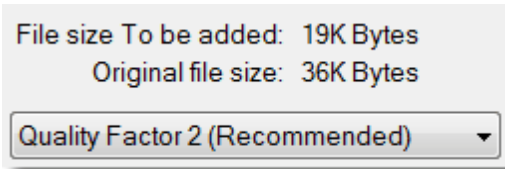
### Add



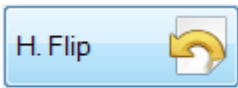
Press the Green Tick ADD button to complete the process of adding a Logo for use in Pastoral Care.

**Rotate**

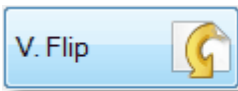
Rotate the image 90 Degrees to the right. Keep pressing this to continue the rotation in 90 degree steps.

**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**

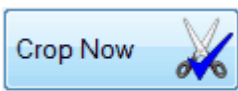
Flip the picture (mirror) horizontally.

**V Flip**

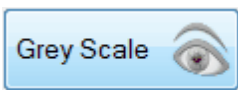
Flip the picture (mirror) vertically.

**Crop**

Select an area of the picture to crop.

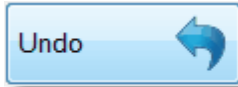
**Crop Now**

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

**Grey Scale**

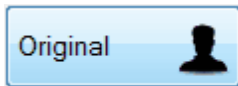
Convert the picture to grey tones only.

### Undo



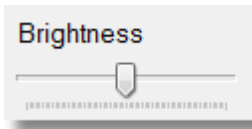
Where available, you can press this to undo the last edit to the picture. You can also use the [Original](#) button if Undo is not available.

### 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

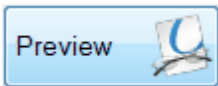
<input checked="" type="checkbox"/> Include Text on 'Name Tag'					
Text	<input type="text" value="Albert St Baptist"/>	Colour	<input type="text" value="Black"/>		
Font	<input type="text" value="Arial"/>	<input type="text" value="10"/>	Top Position	<input type="text" value="42"/>	mm
	<input checked="" 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.

Address Label ×

Active Families ▼

<input type="checkbox"/> Allwright Stephen & Marion	<input type="checkbox"/> McCoy Darryl & Barbara
<input type="checkbox"/> Angel Peter & Belinda	<input type="checkbox"/> Morton Peter & Judy
<input type="checkbox"/> Anglin Brent & Katey	<input type="checkbox"/> Nixon Greg & Esther
<input type="checkbox"/> Barton Ray & Ethel	<input type="checkbox"/> Oliver Bruce & Fran
<input type="checkbox"/> Blackeby Dot	<input type="checkbox"/> Potter Milton & Wendy
<input type="checkbox"/> Blackeby Helen	<input type="checkbox"/> Read Michael & Alison
<input type="checkbox"/> Brown Peter & Heather	<input type="checkbox"/> Taylor Greg & Ruth
<input type="checkbox"/> Chapman Adrien & Ruth	
<input type="checkbox"/> Collins Fred & Jill	
<input type="checkbox"/> Dimsey Richard & Lorraine	
<input type="checkbox"/> Dobber Hugo & Ruby	
<input type="checkbox"/> Eadon Jack & Edith	
<input type="checkbox"/> Edwards David & Helen	
<input type="checkbox"/> Flemming John & Julie	
<input type="checkbox"/> French Harry & Rose	
<input type="checkbox"/> Gordan Frank & Lorna	
<input type="checkbox"/> Graham Ross & Brook	
<input type="checkbox"/> Gray Peter	
<input type="checkbox"/> Harris Darryn & Annita	
<input type="checkbox"/> Iles Bill & Wendy	
<input type="checkbox"/> Jones Charlie & Wendy	
<input type="checkbox"/> Kean Steve & Jenny	
<input type="checkbox"/> Knight Mike & Sue	
<input type="checkbox"/> Leah Adam & Marg	
<input type="checkbox"/> Lynch Allan & Kerry	

Preview Family

Preview Tag

Preview Run

Report Mode

Family

Individual

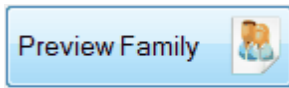
Preview run amount

Families

Help

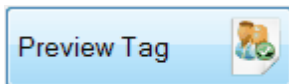
Close

### Preview Family



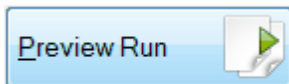
Press the Preview Family button to preview a single Family. The family that will be displayed on the report will be the highlighted family.

### Preview Tag



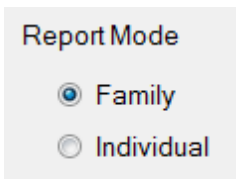
Press the Preview Tag button to preview all families that have been Tagged in this window.

### Preview Run



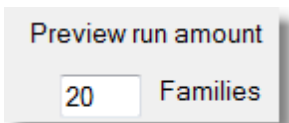
Use this button (Recommended) to preview a run of families as entered in the [Preview Run Amount](#) amount. The default is 20 families.

### 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.

## Setup 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

Is the letter 'I' & 'O' bypassed?

Yes  No

Side scale of map '1' to



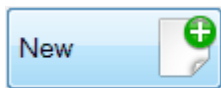
## Landmarks

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.

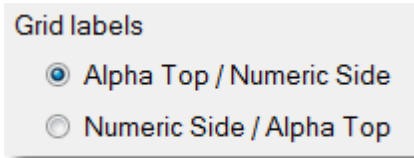


Move the selected landmark down in the list.



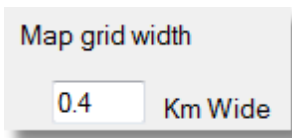
Remove the selected landmark.

### Grid Labels



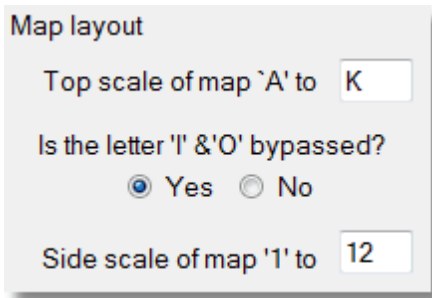
Choose which side of your street directory has Alpha and which side has Numeric grid labels.

### Map Grid Width



Enter the distance in KM across a single map grid square. This will be used when estimating distance on reports.

### Map Layout



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.

Mapping Position Legend

				15	16	17	18			
			25	26	27	28	29			
				37	38	39	40			
				48	49	50				

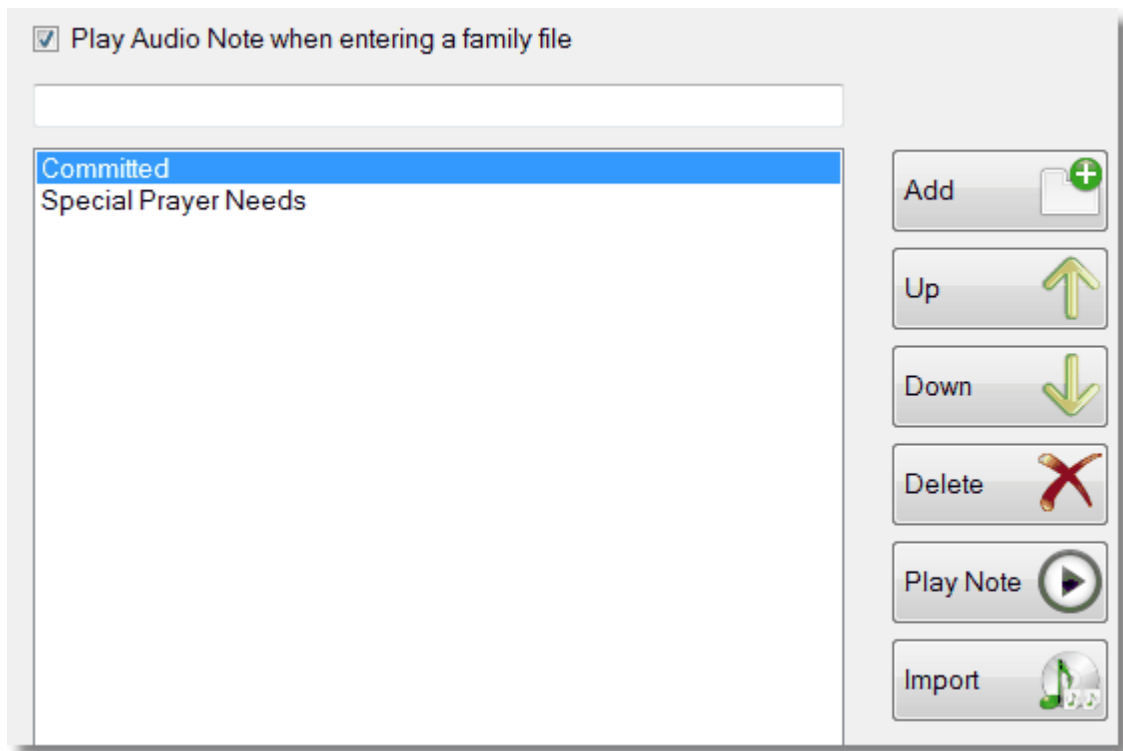
Help ? Cancel ↩ Close ↻

## Setup 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



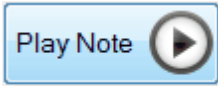
Use the Sort Buttons to sort the list of Audio Prompts.

### Delete



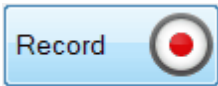
Delete the selected Audio Note

### Play Note



Press this to play the selected Audio Note.

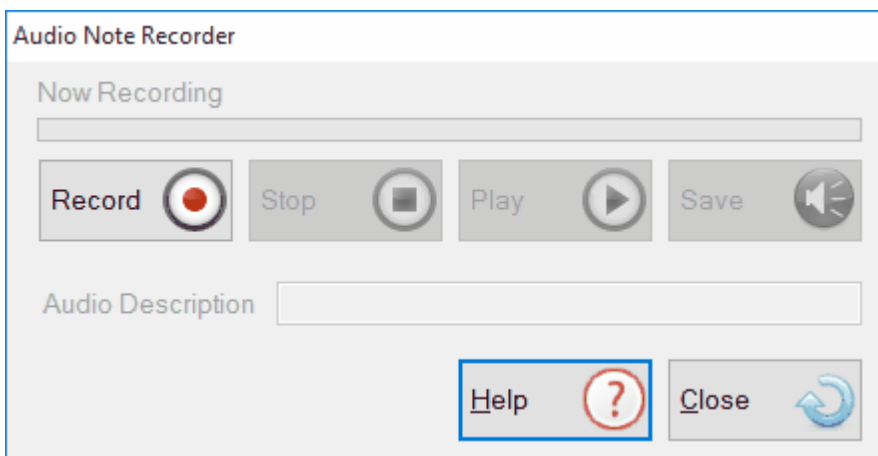
### Record



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

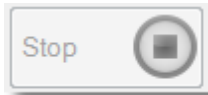


Enter a description to describe the recorded note. This is the title that people will see when selecting an Audio Note for use.

### 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:

You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)

Setup Area	Description	Example
<b>Status</b>	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>
<b>Individual Groups</b>	Our suggestion is to use Groups where you are defining a group of people that actually meet together for a common purpose. See also <a href="#">Individual Groups</a> for more information on this setup area.	<i>Outreach Team, Youth Group, Sunday School, Leadership Team, Cricket Club</i>
<b>Ministry</b>	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>
<b>Medical</b>	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>
<b>Relationship</b>	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>
<b>Individual Dates</b>	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>
<b>Flexi Fields</b>	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	<i>Ideal for storing information that Pastoral Care does not already store. For example Blood Group,</i>

information to be saved against that flexi-field

**Family Groups** A Family Group is a group that by definition, the entire family participates in. These are rare, however they are useful for controlling an entire family with one selection. *Language groups, Congregational Groups*

**Family Dates** A Family Date 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.

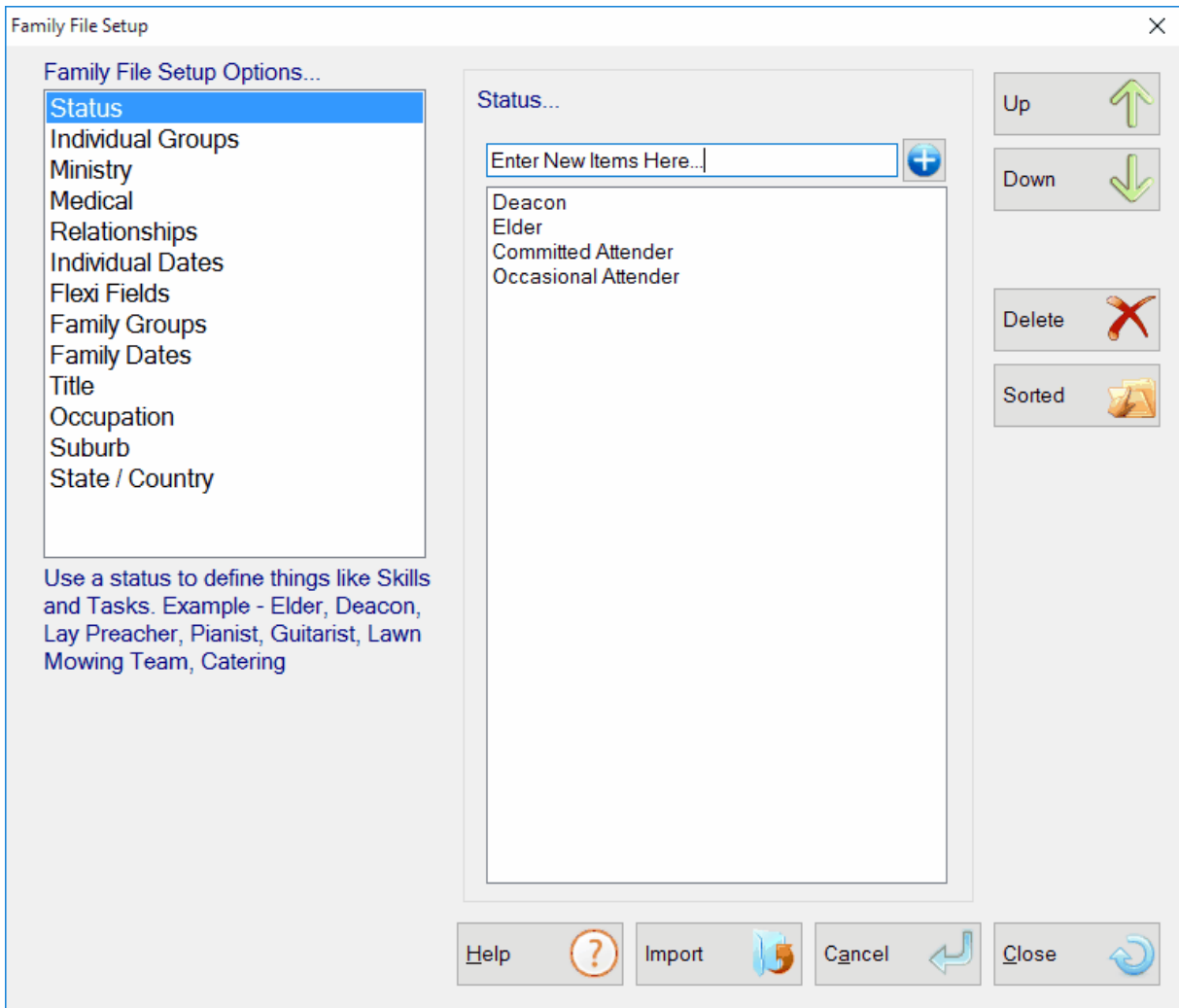


See also [Individual Groups](#) for further information on Groups in Pastoral Care.



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.



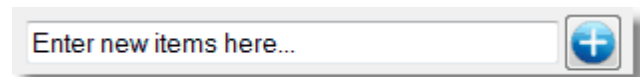
- Status
- Individual Groups
- Ministry
- Medical
- Relationships
- Individual Dates
- Flexi Fields
- Family Groups
- Family Dates
- Title
- Occupation
- Suburb
- State / Country

## Current Items


This is a list of current items in the selected [Setup Options](#) area. An example of Status is shown below...



## Enter New Item



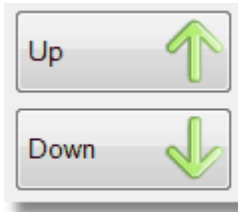
Enter a new item for selected setup area, and either press the Enter key on your keyboard, or press the blue +

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



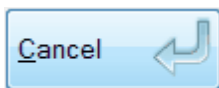
Press this button to sort the current list into Alphabetical Order

### Import



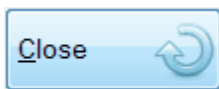
Press this to allow you to import settings from another church database.

### Cancel



Press this if you have changed your mind on an edit. Cancel will close you out of this area without saving changes.

### Close

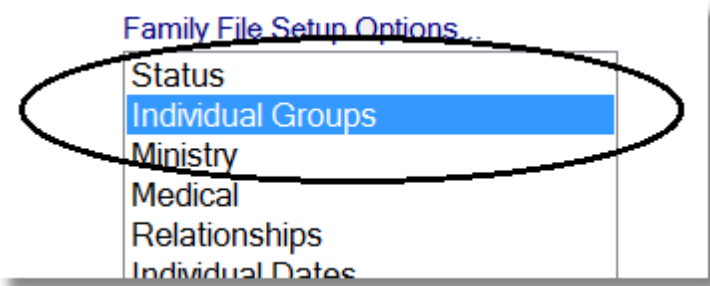


Press this to save and exit this setup area.

## Individual Groups

Individual Groups have a few extra features that other setup areas do not have.

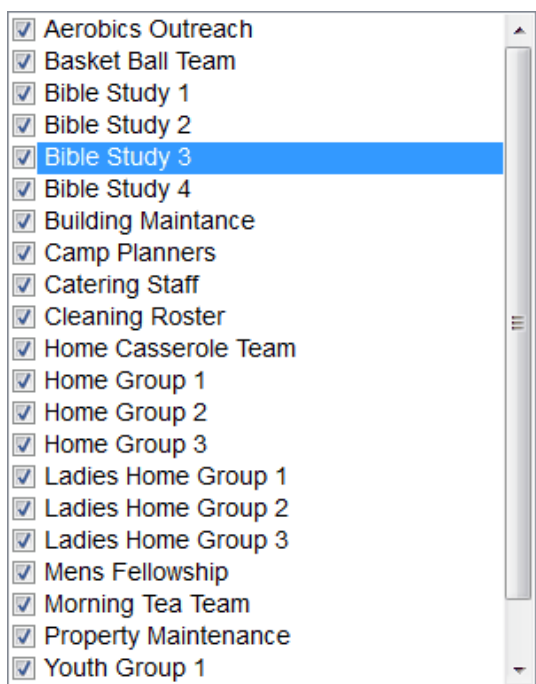
When you select the Individual Groups item from the [Setup - Family File](#) Area you have the addition of a Tick Box in the list of Individual Groups, as well as a Group Details Button.



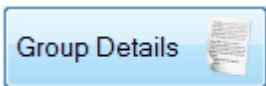
### Select Groups

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.

Group Details ×

**Bible Study 1**

Leader	<input type="text" value="John Franks"/>	Phone	<input type="text" value="03 999-88877"/>
Assistant	<input type="text" value="Helen Franks"/>	Phone	<input type="text"/>
Host	<input type="text" value="John and Helen Franks"/>	Phone	<input type="text"/>
Day/Date	<input type="text" value="Thursday"/>	Time	<input type="text" value="7pm"/>
Venue / Address	<input type="text" value="3 Grant Ave Woolamalong"/>		
Frequency	<input type="text" value="Every Week!"/>		
Comments	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>		

Report 

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.

You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)



Click on each area below to learn more...

Visitation Manager Setup

Visitation Team Name

Team 1  
Team 2  
Team 3  
Team 4

Up

Down

Delete

Sorted

Help

Cancel

Close

### Enter New Item

Enter new items here...

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.



## Order



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



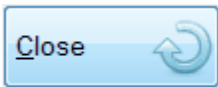
Press this button to sort the current list into Alphabetical Order

### 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

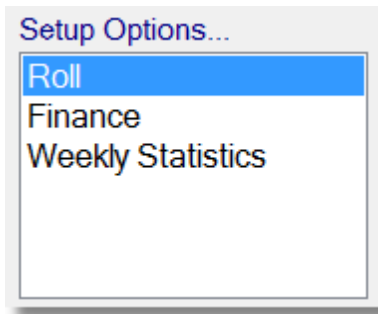
This setup area allows you to setup the Roll Projects, Finance Projects and Weekly Projects. If you are considering using both Roll and Weekly, then please consider naming the setup items for events similar or the same so that reporting has a more consistent feel to it. Also consider the setup / naming of events in the Roster area if you are using or intending to use Rosters.

You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)

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

Home Groups

Event 1

Event 2

Event 3

Event 4

Event 5

Event 6

Event 7

Include as full attendance in analysis if...

Absent 1

Absent 2

Absent 3

Absent 4

Up

Down


Delete

Help

Cancel

Close

## Add Project

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:

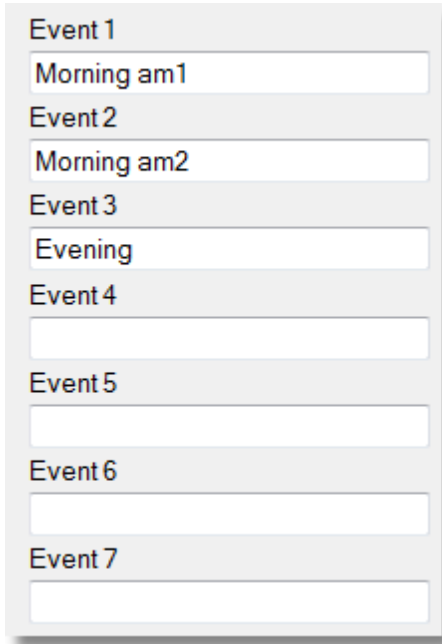
Project	Suggest Event Names
•Sunday Services	<i>AM1, AM2, Evening</i>
•Home Groups	<i>The Smiths, The Shaws, Pastor John</i>
•Scout Meetings / Youth Meetings	<i>1st Ivanhoe, 2nd Ivanhoe, etc</i>
•Bible Studies	<i>The Smiths, The Shaws, Pastor John</i>
•Business Meetings	<i>1st Qtr, 2nd Qtr, 3rd Qtr, 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.

## 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.



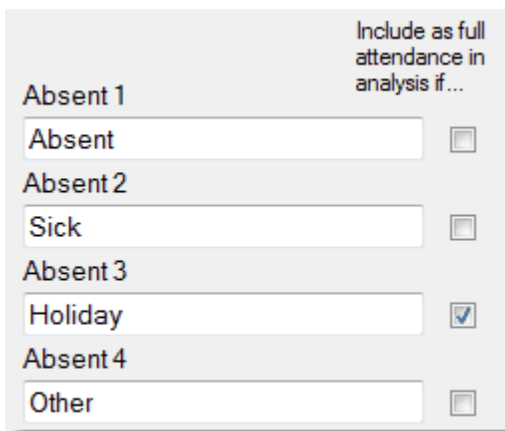
The screenshot shows a vertical list of seven event slots. Each slot consists of a label (Event 1 through Event 7) and a text input field. The input fields contain the following text: Event 1: Morning am1; Event 2: Morning am2; Event 3: Evening; Event 4: (empty); Event 5: (empty); Event 6: (empty); Event 7: (empty).

## 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.



The screenshot shows a form with four rows, each representing an absent category. To the right of the categories is a column of checkboxes labeled 'Include as full attendance in analysis if...'. The categories and their corresponding checkboxes are: Absent 1: Absent (checkbox unchecked); Absent 2: Sick (checkbox unchecked); Absent 3: Holiday (checkbox checked); Absent 4: Other (checkbox unchecked).

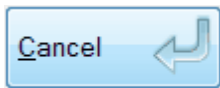
**Sort**

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**

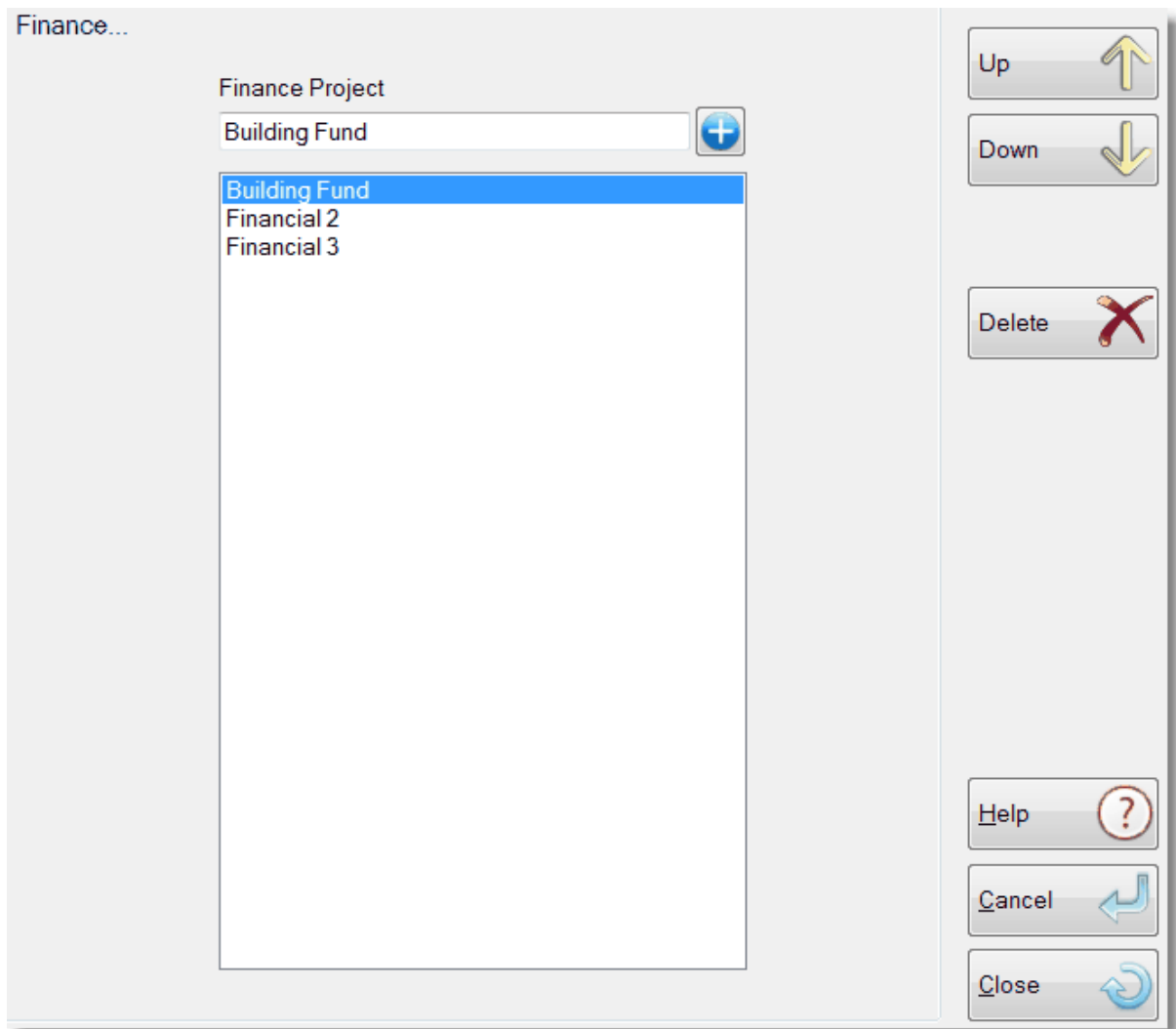
Press this button to save any edit's or additions etc to the Roll Project area and close the setup area.

**Setting Up Financial Projects**

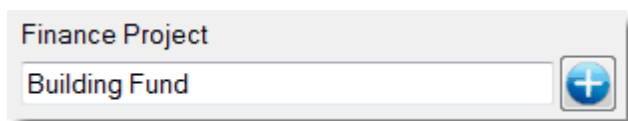
Setup up Financial Projects for donations to be accepted against. See also [Financial Records](#) for information on how Financial Projects are used in Pastoral Care.



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.



Building Fund  
O/S Missions  
Local Mission  
Development Fund

### Cancel



Press this to cancel any changes to the Financial Projects setup area.

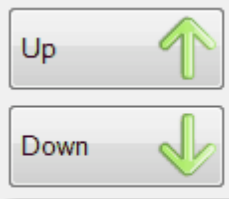
### Delete



Press the delete button to delete the selected Financial Project.

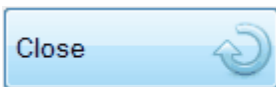
Warning, deleting a Financial Project will also delete all Financial Records already saved against that Project. No data recovery or undo is possible if you accidentally delete a Project.

### 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.



## Setting Up 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.

### Add Project

Enter A Weekly Project name and press ENTER to add it to the list of projects, or press the Blue + button. 

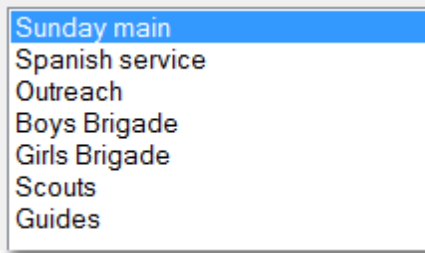
Some examples of Weekly Projects could be:

**Project****Suggest Event Names**

- Sunday Services *AM1, AM2, Evening*
- Home Groups *The Smiths, The Shaws, Pastor John*
- Scout Meetings / Youth Meetings *1st Ivanhoe, 2nd Ivanhoe, etc*
- Bible Studies *The Smiths, The Shaws, Pastor John*
- Business Meetings *1st Qtr, 2nd Qtr, 3rd Qtr, AGM*

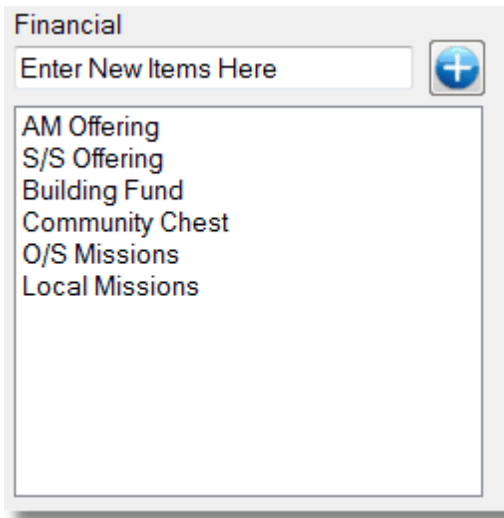
**Project Name**

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.

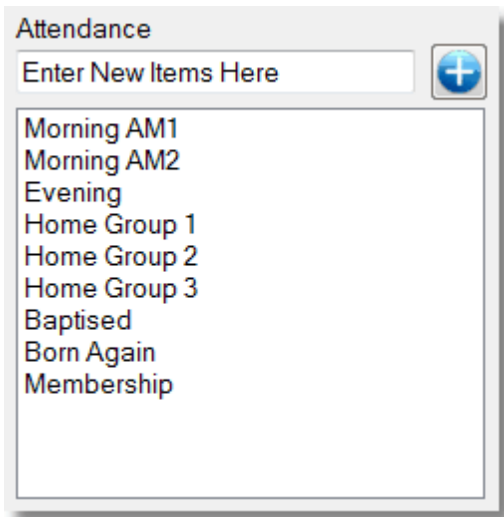
Simply type in a new item and press Enter or the Blue + button () to add it to the list of Financial items for the selected Weekly Statistics Project.



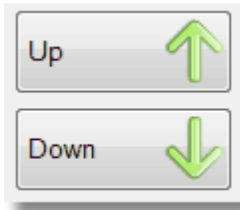
## Attendance

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.

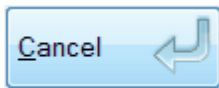
**Sort**

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!

You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)

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 it's OWN unique combination of duties. ALSO, each Event and Duty combination can have it's 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 it's selected duties has it's own properties for how many people, and how often that duty is performed.

## Roster Setup Window

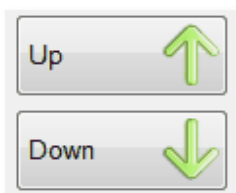
If you are new to rosters, please check out the [Introduction](#) section before diving right in!



Click on each part of the Roster Setup area below to learn more about Rosters settings.

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.

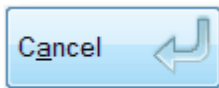
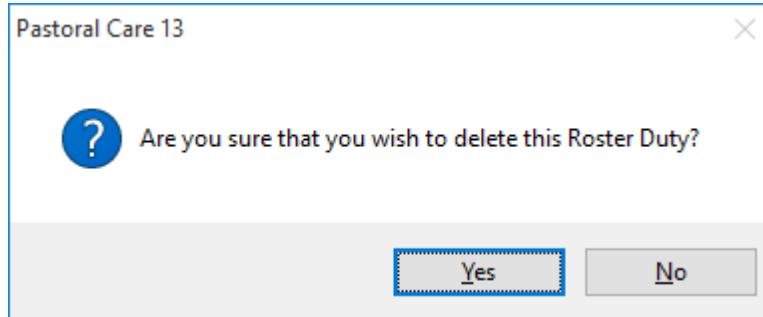
For example, event order should be your Sunday Services First, followed by the next most frequents events.

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.

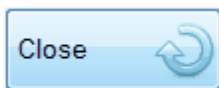
This is not about who's job is more important, it's about grouping duties (not people) into a logical unit that helps you see the big picture quickly.



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

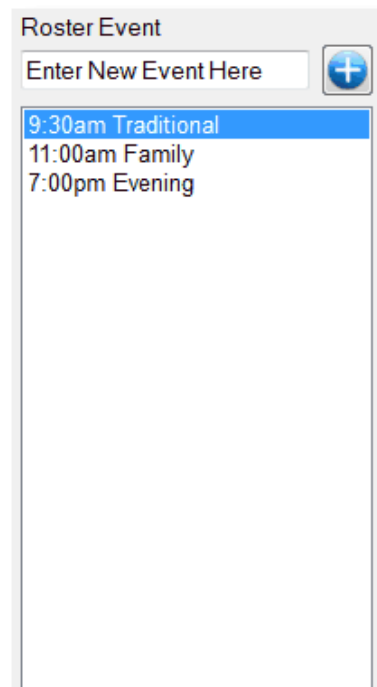
An Event is simply a meeting or gathering that you want to roster people on to do things at. You can also include the "less frequent" events like Good Friday, Christmas day etc. If you setup these events also, it makes rostering so much easier down the track.

### 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

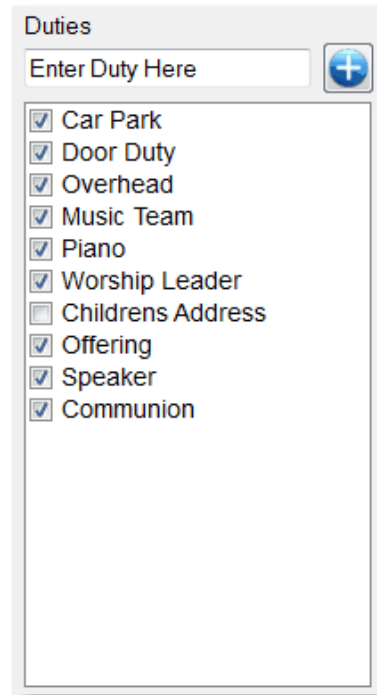
Select a Duty in the list by clicking on it's name, then you can edit information like Frequency, Number of people needed for that duty etc.

### 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 allot 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...

**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

Test

**Maximum Amounts within Duty**

People

Teams

---

**Duty Pattern for Auto Build**

Every Date Entered

Frequency

Every

Starting From

## 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	Duties	Maximum Amounts within Duty
<input type="text"/> <input checked="" type="checkbox"/> 9:30am Traditional <input type="checkbox"/> 11:00am Family <input type="checkbox"/> 7:00pm Evening	<input type="text"/> <input checked="" type="checkbox"/> Communion <input checked="" type="checkbox"/> Car Park <input checked="" type="checkbox"/> Door Duty <input checked="" type="checkbox"/> Overhead <input checked="" type="checkbox"/> Music Team <input checked="" type="checkbox"/> Piano <input checked="" type="checkbox"/> Worship Leader <input type="checkbox"/> Childrens Address <input checked="" type="checkbox"/> Offering <input checked="" type="checkbox"/> Speaker	People <input type="text" value="1"/> Teams <input type="text" value="1"/> <hr/> Duty Pattern for Auto Build <input type="radio"/> Every Date Entered <input type="radio"/> Frequency Every <input type="text" value="2 weeks"/> Starting From <input type="text" value="26/12/2012"/> <input checked="" type="radio"/> Regular Pattern <input checked="" type="checkbox"/> 1st <input type="checkbox"/> 2nd <input checked="" type="checkbox"/> 3rd <input type="checkbox"/> 4th <input type="checkbox"/> 5th <input type="text" value="Sunday"/> of Every Month

### 11 AM Family Settings

Roster Event	Duties	Maximum Amounts within Duty
<input type="text"/> <input type="checkbox"/> 9:30am Traditional <input checked="" type="checkbox"/> 11:00am Family <input type="checkbox"/> 7:00pm Evening	<input type="text"/> <input checked="" type="checkbox"/> Communion <input checked="" type="checkbox"/> Car Park <input checked="" type="checkbox"/> Door Duty <input checked="" type="checkbox"/> Overhead <input checked="" type="checkbox"/> Music Team <input checked="" type="checkbox"/> Piano <input checked="" type="checkbox"/> Worship Leader <input checked="" type="checkbox"/> Childrens Address <input checked="" type="checkbox"/> Offering <input checked="" type="checkbox"/> Speaker	People <input type="text" value="1"/> Teams <input type="text" value="1"/> <hr/> Duty Pattern for Auto Build <input type="radio"/> Every Date Entered <input type="radio"/> Frequency Every <input type="text" value="2 weeks"/> Starting From <input type="text" value="26/12/2012"/> <input checked="" type="radio"/> Regular Pattern <input type="checkbox"/> 1st <input checked="" type="checkbox"/> 2nd <input type="checkbox"/> 3rd <input checked="" type="checkbox"/> 4th <input type="checkbox"/> 5th <input type="text" value="Sunday"/> of Every Month

Every Date Entered

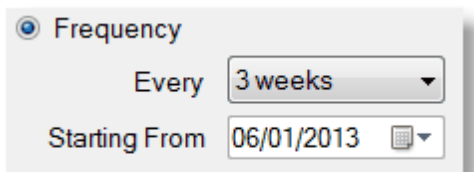
The Every Date Entered option is the simplest and most common Duty Pattern to use. This is suitable for

Duties that occur *all the time!*

Here are some possible examples of duties that you may have for every event...

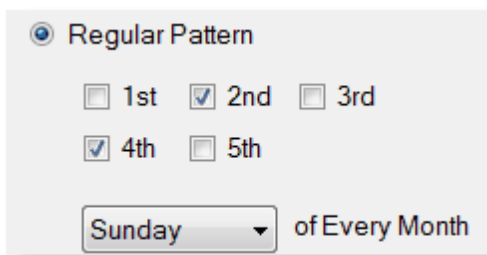
- Preacher
- Service Leader
- Welcoming
- Musicians

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 date field set to "06/01/2013" and a calendar icon.

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 Child Safe

The Setup area for Child Safe 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.

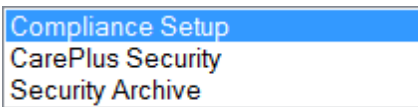
You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)

See also [Child Safe](#) for full details on how to use this feature.

There are 3 setup areas in Child Safe settings. [Compliance Setup](#), [Child Safe Security](#) and [Security Archive](#).



Click on each area below to learn more.



## Compliance Setup

The Child Safe setup area shown below is displayed with one Compliance Type already setup as a sample.



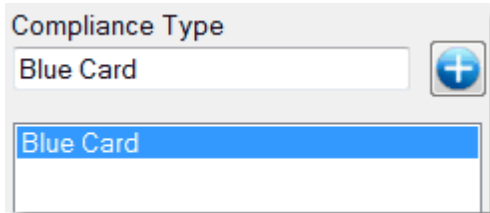
Click on each area to learn more about this area.

## 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. 

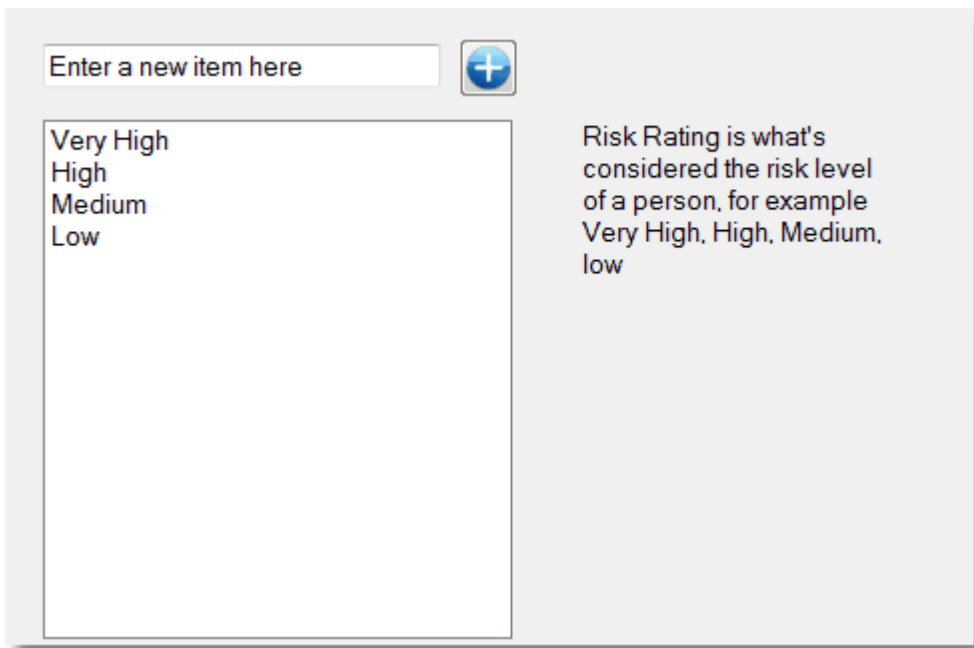
To add other items to that Compliance Type simply select it from the list (Blue Card is shown selected below) to allow you to add further information to the [Risk](#), [Status](#), [Reviews](#), [Procedure](#), [Event](#), [Comment](#) and [Incident](#) areas.



### 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

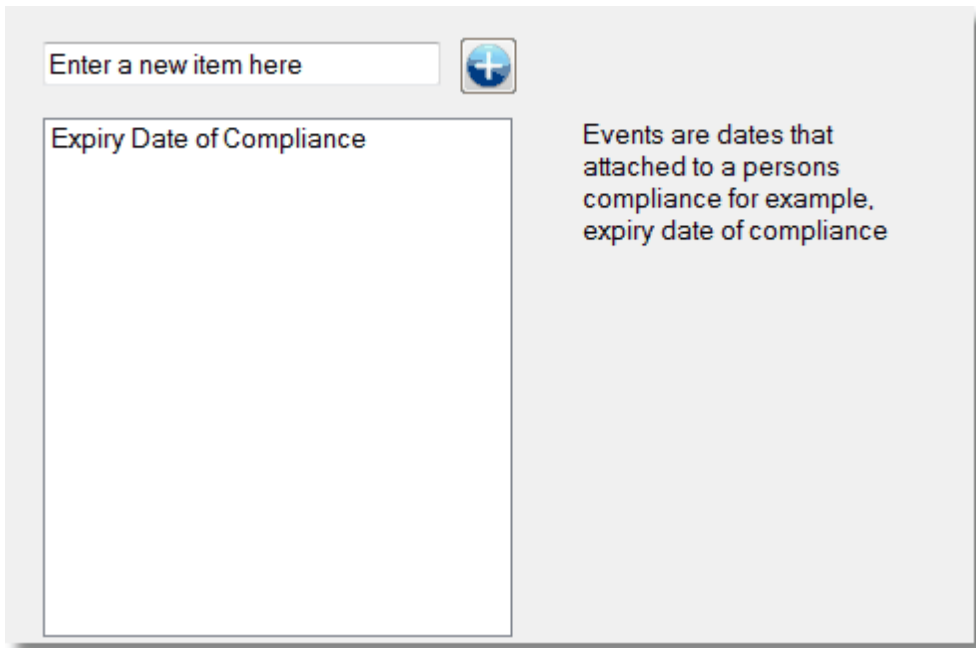
## Event


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

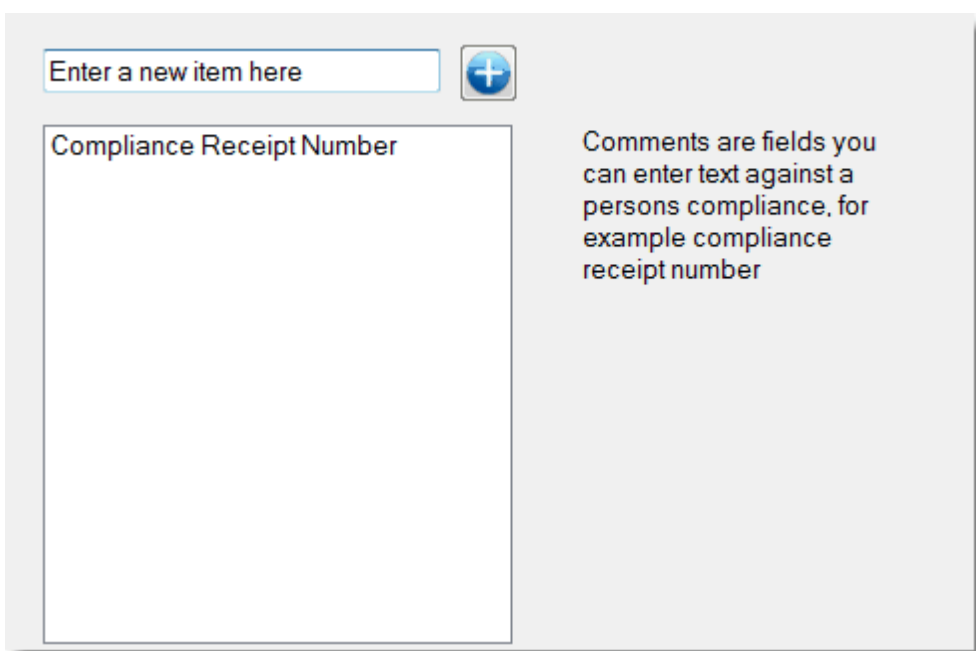
Events are dates that attached to a persons compliance for example, expiry date of compliance


### 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.

Enter a new item here

Under Investigation  
Investigation Completed

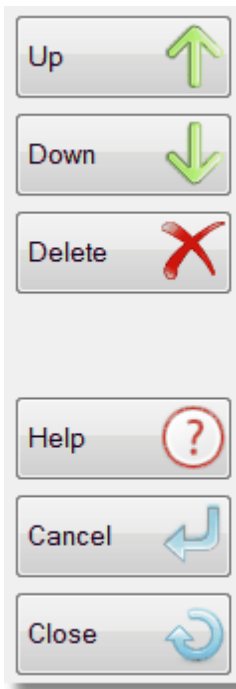
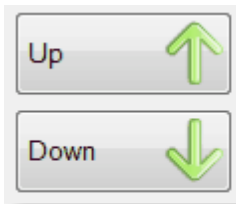
Incident is the current status of an incident placed against a person with a compliance, for example Under Investigation, Investigation completed

## Item Controls

On the side of the Child Safe setup window is a number of common buttons that work in all of the areas.



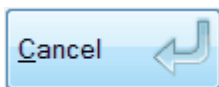
They are shown below, click on each one for more information.

**Sort**

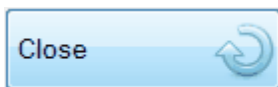
Use these buttons to sort any of the selected setup list items.

**Delete**

Press the delete button to delete the selected Item from a setup list.

**Cancel**

Press this to cancel any changes to the Child Safe settings area and exit this area.

**Close**

Press this to save all changes to the Child Safe settings area and exit.

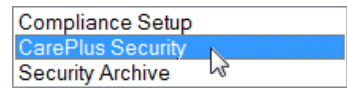
## Child Safe Security

As well as using Pastoral Care general security (Usernames, Passwords and Access levels) the Child Safe area of Pastoral Care has its own second tier of security.

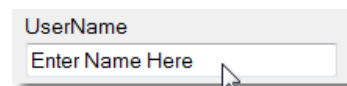
See also [Setup Security](#) for further information on setting up general security for Pastoral Care.


### How to add a User and Password to Child Safe

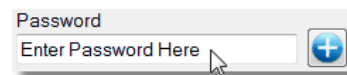
**Step 1** Select Child Safe Security from the Child Safe Setup Area



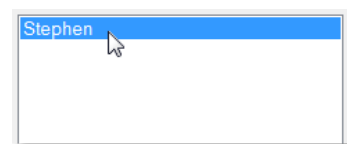
**Step 2** Enter a user name



**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**

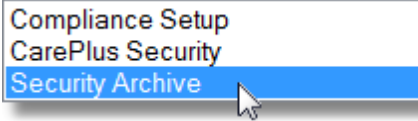
<input checked="" type="checkbox"/> Notes	<input checked="" type="checkbox"/> Application	<input checked="" type="checkbox"/> Referee
<input checked="" type="checkbox"/> Incident	<input checked="" type="checkbox"/> Audit	<input checked="" type="checkbox"/> Reports
<input checked="" type="checkbox"/> Document	<input checked="" type="checkbox"/> 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 Child Safe setup area to see a list of which usernames have had access to the Child Safe program. The following window opens showing you who has used Child Safe 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.

You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)



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.

### Add Library

Enter a new Library Name for use and press ENTER to save that name, or press the Blue + button to complete

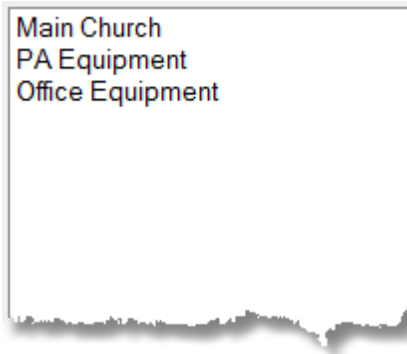
the entry.

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.



## 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




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

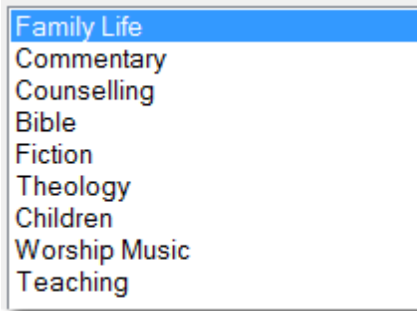
Category Name	
Family Life	

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.

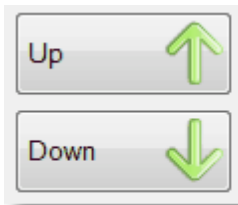


## Maximum Assets

Maximum Assets a person can borrow

Enter a number to restrict the Maximum number of assets a single person can borrow for the selected Library.

## Sort



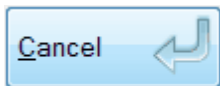
Use these buttons to sort any of the selected setup list items.

## Delete



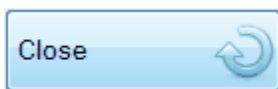
Press the delete button to delete the selected Item from a setup list.

## 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.

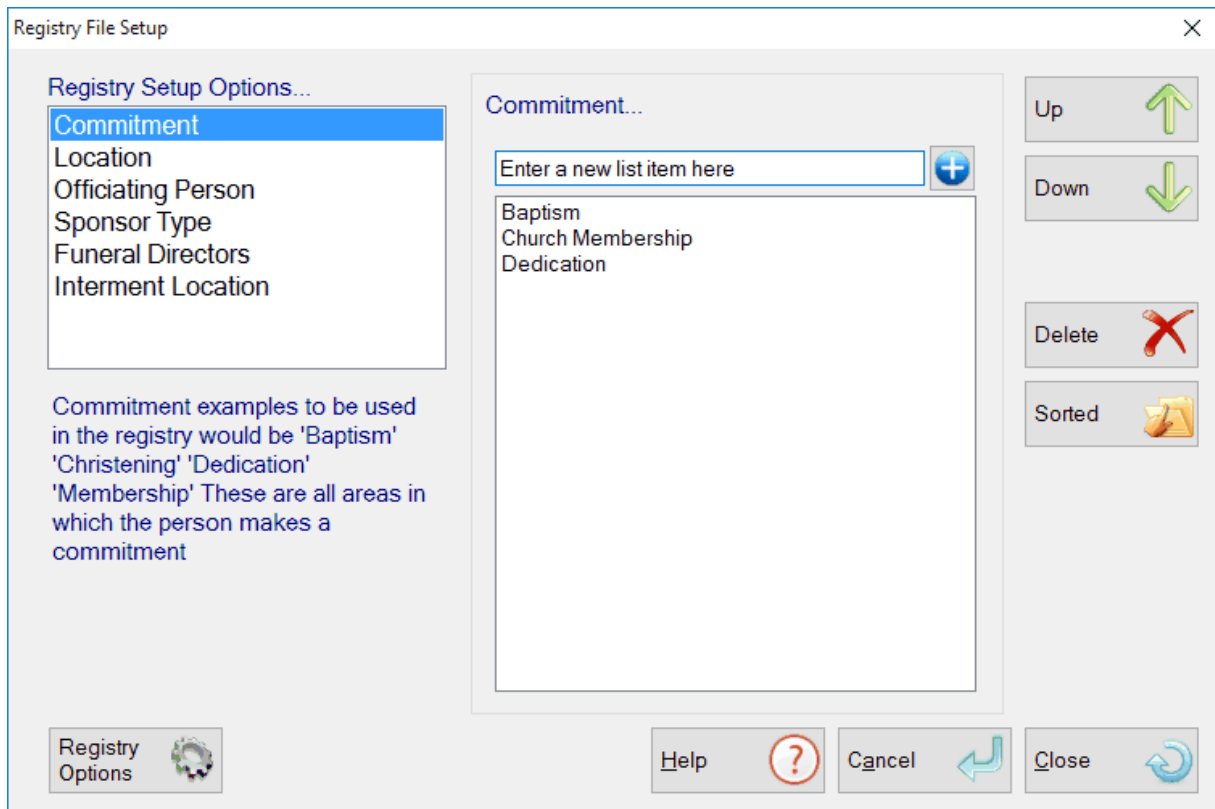
## Setup Registry

The window shown below is the setup area for the [Registry](#) feature.

You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)

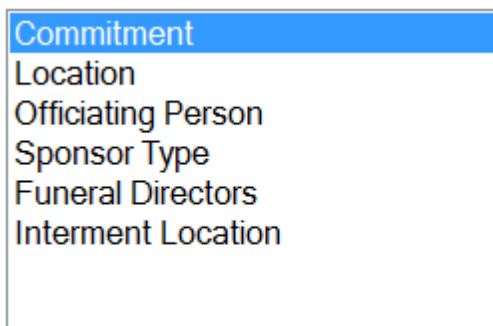


Click on each area of the window below for more information.



### Registry Setup Items

There are 6 different items that can be pre-setup for use within the Registry feature. Each of these lists can be added to from the Registry area as well.



### Commitment

Enter the type of Commitment you want to record. Such as Baptism, Membership, Dedication Etc



## Location

Enter the names of each location (usually a church or civic facility) that can be used for a Commitment or wedding etc

## Officiating Person

Enter the name(s) of each person who has officiated at a Wedding, Funeral or Commitment ceremony.

## Sponsor Type

Enter the type of sponsors. For example Parent, Godmother, Teacher, etc

## Funeral Directors

Enter the names of Funeral Directors

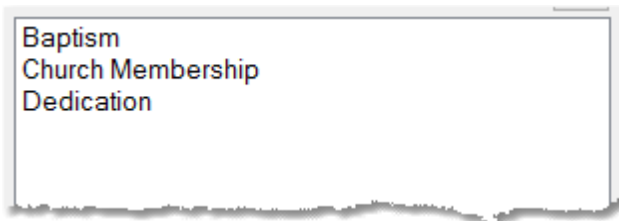
## Interment Location

Enter the names of each location for an interment (Burial or Cremation) which is the location of where a deceased remains are held.


## Item List

This is the list of items for the selected [Registry Setup Items](#)

Sample Commitment Items are shown below.

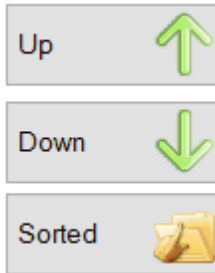


## Adding an Item

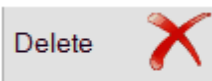
To add an item to a selected Setup Item, select the item from the [Registry Setup Items](#) list, and enter the new item name in the box shown above, then press Enter or the Blue + button.

## Sorting a list of Items



Use the Up and Down buttons to move a selected list item to another location in the list, or press the Sorted button to sort the list alphabetically.

## Delete an Item



Press the Delete Button to remove the selected item from the list. This cannot be undone.

## Registry Options



The options here affect the default behavior of the Navigation buttons and the Load button in the Registry Areas.

### Auto Save

Tick Auto Save to set the program to save automatically.

### Navigation Options

Set for the Next and Previous buttons to move either to the next event date, or the next Surname.

### Load Options

Set the load button to either load in all data, or just the current year for each area in the registry program.

## Setup Venue Booking

This is the setup area for the Venue Booking Feature.

You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)



Click on each part of the screen below for more information.

### Venue


Most churches will only have one venue. It is important that you use the setup of this feature to suit your requirements.

A typical setup will be 1 venue (being 1 building) with multiple rooms for booking. If you want to track conflicts all together across multiple buildings, then you need to have 1 venue, conflicting bookings are not tracked across multiple venues

To enter a new venue name, simply type a name in the empty Venue field, and press the blue + button. If a venue is already selected, click on the end of the venue and press ENTER to clear that selection, or you may over-type over an existing venue name.

## Room

Room

Enter a room name here... 


Church Worship Auditorium  
Vestry  
Meeting Room  
Sunday School Room 1  
Sunday School Room 2  
Kitchen

To add rooms to your Venue, first select your Venue from the Venue List, then enter a name in the Room field and press ENTER or press the blue + button.

To rename a room, select it in the list, over type the name in the field above this list and press ENTER on your keyboard or press the blue + button.

## Event

Event

Enter an Event Title here... 



Worship Service  
Wedding  
Funeral

To add Event Titles for frequent use to your Venue, first select your Venue from the Venue List, then enter a title in the Event field and press ENTER or press the blue + button.

To rename an Event title, select it in the list, over type the new title in the field above this list and press ENTER on your keyboard or press the blue + button.

## Administrator

Administrator

Enter an Administrator here...  

Allwright Marion  
Angel Belinda  
Brown Peter  
Chapman Ruth  
Dimsey Richard  
Dobber Ruby

To add a Venue Administrator, first select your Venue from the Venue List, then enter a Name of your administrator title in the Administrator field and press ENTER or press the blue + button.

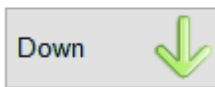
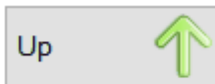


You can also press the small button to the left of the Blue add button to select a person from your Pastoral Care Database.

An Administrator is usually the person making the booking in Pastoral Care.

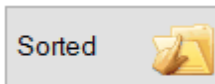
### Manual List Sort

Select any item in any of the lists on the Venue Setup window, then use these arrow buttons to move them within their list to a new position.



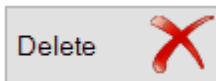
### Alphabetical Sort

Select any item in any of the lists on the Venue Setup window, then use the Sorted button to sort that list Alphabetically.



### Delete

Select any item in any of the lists on the Venue Setup window, then use the Delete button to remove that item from the list.

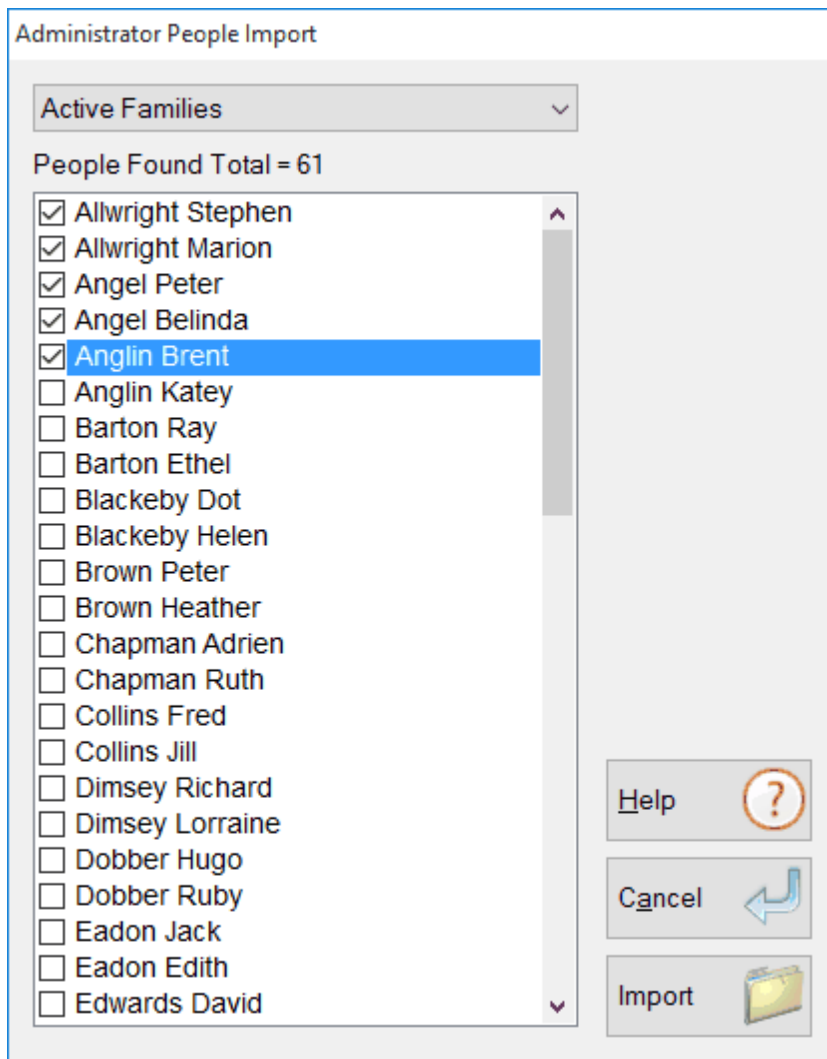


### Select Administrator

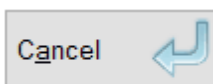


Press this button to show the Administrator Import window.

This lets you select multiple people and import them into the Venue Booking Administrator list. Simply tick those people you want to import, and press the Import button.

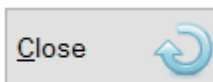


### Cancel



Exit the Venue Setting area and do not save any changes made to this area.

### Close



Exit the Venue Setup area saving all changes.

## Classroom Manager Setup

### Classroom Manager Setup Area

The [Class Room Manager](#) has its own setup area.

You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)



Click on each part of the screen below for more information

(Please note, this sample screen is shown with 2 departments already setup, and some classes already setup.)

## Departments

### Departments

Many churches may only have one department. Perhaps it's called Junior Church, Sunday School or something else. This top level organizational unit is the main heading that your classes sit under. In a typical scenario, you may have Sunday School as your department, and under that department have some classes like Juniors, Primary, Secondary, Young Adults etc.

To add a department, simply type a name in the clear text box under the title of Department, and press the blue Plus Button to add it.

## Class

### Class

To add a Class, firstly enter and select a [Department](#)

With a Department selected, you can enter your Class Names (Some examples shown below) Simply type a name in the text box and press enter, or the Blue Plus button.

To edit an item, select it in the list, edit the name, and press the Plus button to update the item.

## Pin Password

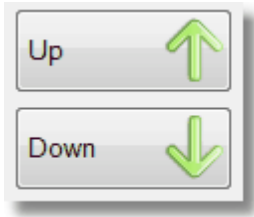
To access PIN numbers for authorising a checkout, you will need to use a password. This password cannot be blank, and is set here.

## Sort

Use the sort buttons to move items in any selected list (Departments or Classes) by selecting an item, and pressing the up and down arrow.

The sort set here will effect the presentation of items in the Classroom Manager program.





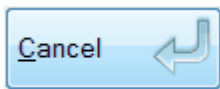
### Delete



Press the delete button to delete the selected item (Department or Class)

Warning, deleting any item from here will remove any saved and processed check in / checkout records associated with that item. No data recovery or undo is possible if you accidentally delete an item on this page, you would need to use the Restore utility to restore a previous backup.

### Cancel



Press this to cancel any changes to the Classroom Manager Setup

### Close



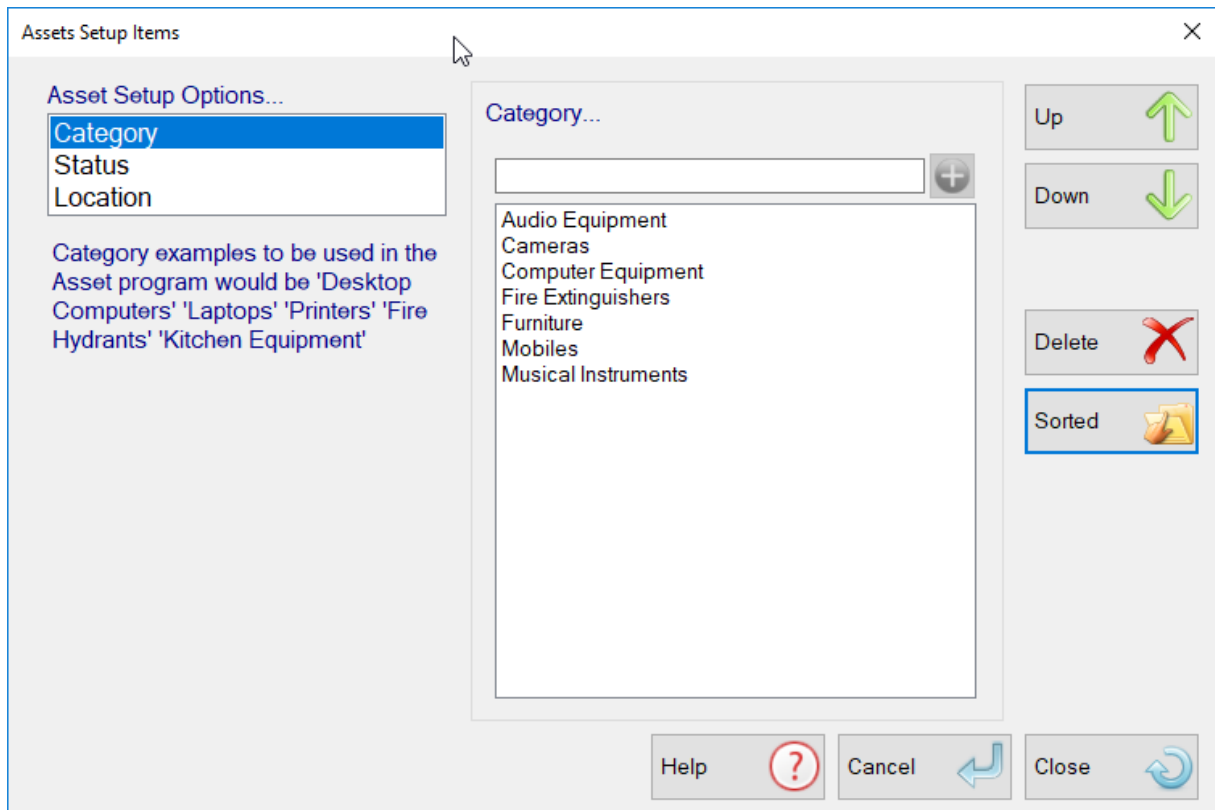
Press this button to save any edit's or additions etc to the Classroom Manager area and close the setup area.

## Asset Manager Setup

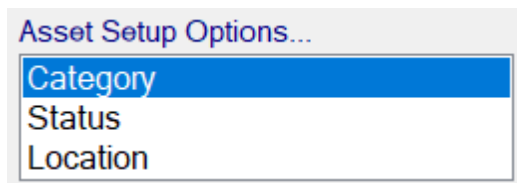
This setup is for setting the options for the [Asset Manager](#) feature found on the Church Tab of the main menu.



Click on each of the areas below to learn more about each function



### Asset Setup Options

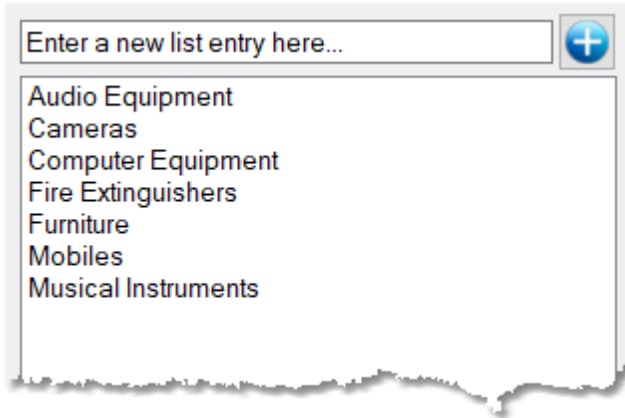


Use this selection to allow you to add or change settings for each of these 3 areas.

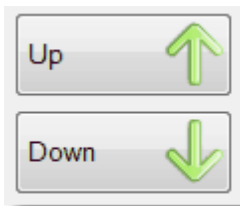
#### Add Item

To enter a new item, select the [Asset Setup Options](#) first, then enter an appropriate item in the box shown below and press the Blue/White + Icon shown to add that item to the list.

To edit an items name, simply select it from the list, and make the change in the edit box above the list and press enter when done.

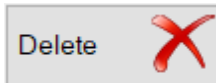


### Sort



Use these buttons to move any selected item to another location in that list.

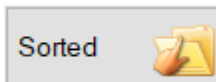
### Delete



Use this delete button to remove the selected item from one of the setup areas of the Asset Manager.

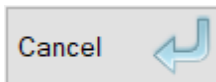
Note, only that item will be removed from the list. ALL ASSETS will remain in the asset register.

### Sorted



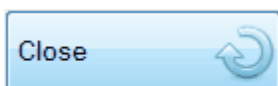
Press this to automatically sort the currently selected list of items into Alphabetical order.

### Cancel



If you are unhappy with any changes you have made, you can press Cancel to close this area without saving your changes.

### Close



Press this button to save any edit's or additions etc before closing the Asset Manager setup area.

## Setup Security

### Setup Security

You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)



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 Setup**

Security Mode  OFF  On

Encrypt Family Notes

On Startup use a UserName text entry

Make Passwords Case Sensitive

UserName  
Admin

Russell  
Admin  
Stephen

UserName Properties

Password: Kxd\$in1

Notes: Admin with full access and security

Alternate Email Address: admin@ssb.org.au

Alternate Email Name:

Alternate SMS Mobile ID: 0444-999-999

Alternate SMS UserName: ssbAdmin

Alternate SMS Password: @d45yXZ

Visitation Request Name:

Security Level  
 Security Setup Access

Create SMS Account

Access All Levels

**Church**

- Add a Family
- Read/Write Family Files
- Read Only Family Files
- Notebook-Family Notes
- NoteBook-Visitation Notes
- NoteBook-Personal Notes

**Explore**

- Create Reports
- Dashboard
- SMS Manager
- Email Manager
- View Saved Reports
- People to Group

**Utilities**

- Custom Directory
- Custom Report
- Custom Letter
- Backup Data
- Restore Data
- File Clearance

**Groups**

- Status
- Individual Group
- Ministry
- Medical
- Relationship
- Individual Dates

**Other**

- Cloud Log Information
- QuickDate
- Visit Request
- Main Menu Groups Tab
- Main Menu Visit Tab
- Main Menu SMS Tab

**Setup**

- Global Settings
- Family File
- Visitation
- Roll/Finance/Weekly
- Roster
- Child Safe

Up Down

Delete History

Help Close

## 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.

## Case Sensitive Passwords

Make Passwords Case Sensitive

Tick this option to make all passwords in the security area Case Sensitive.

Please let people know that their passwords will be case sensitive if you tick this option.

## Encrypt Options

Encrypt Family Notes

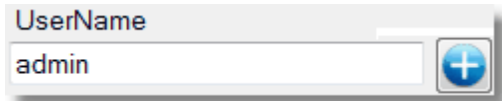
Tick this option if you are using the Notes feature in the family file editor for any personal information. Also make sure that security is turned on and you restrict access to Family Notes if you are entering personal information in that area.

## 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

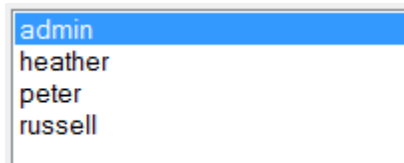


A screenshot of a text input field labeled 'UserName' containing the text 'admin'. To the right of the input field is a blue square button with a white plus sign inside.

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



A screenshot of a list box containing four usernames: 'admin', 'heather', 'peter', and 'russell'. The 'admin' entry is highlighted with a blue background.

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** Enter a Reply To email address to be used instead of the church contact email address.

**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](http://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.

Security Level  
 Security Setup Access

### Church

The security options here relate primarily to all areas accessed via the Church Tab on the main menu. The list shown here has been expanded to show all options, in the program, you will need to use the scroll bar to see all available security levels.

Add a Family  
 Read/Write Family Files  
 Read Only Family Files  
 Notebook-Family Notes  
 NoteBook-Visitation Notes  
 NoteBook-Personal Notes  
 Birth Date Access  
 Visitation Management  
 Roll  
 Full Financial Access  
 P.I.N. Financial Only  
 Weekly Statistics  
 Rosters  
 Child Safe  
 Library Manager  
 Registry - Full Access  
 Registry - Read Only  
 Venue Book - Full Access  
 Venue Book - Read Only

### Explore

The security options here relate primarily to all areas accessed via the Explore Tab on the main menu. The list shown here has been expanded to show all options, in the program, you will need to use the scroll bar to see all available security levels.

Create Reports  
 Dashboard  
 SMS Manager  
 Email Manager  
 View Saved Reports  
 People to Group  
 Group to Group  
 Tagging  
 School Year Manager  
 Group History Manager



**Utilities**

The security options here relate primarily to all areas accessed via the Utilities Tab on the main menu. The list shown here has been expanded to show all options, in the program, you will need to use the scroll bar to see all available security levels.

- Custom Directory
- Custom Report
- Custom Letter
- Backup Data
- Restore Data
- File Clearance
- Export
- Smartphone
- Alerts

**Setup**

The security options here relate primarily to all areas accessed via the Setup Tab on the main menu. The list shown here has been expanded to show all options, in the program, you will need to use the scroll bar to see all available security levels.

- Global Settings
- Family File
- Visitation
- Roll/Finance/Weekly
- Roster
- Child Safe
- Library Manager
- Registry
- Venue Booking
- Vision
- Network Configuration
- Network Locked Files

**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 has been expanded to show all options, in the program, you will need to use the scroll bar to see all available security levels.

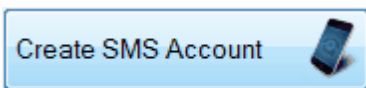
- Status
- Individual Group
- Ministry
- Medical
- Relationship
- Individual Dates
- Flexi Fields
- SMS Lists
- Email List
- Family Other Contacts
- Family Group
- Family Events
- Family Dates
- Visitation

**Other**

The security options here relate to other areas not covered by the above 5 categories.

- Cloud Log Information
- QuickDate
- Visit Request
- Main Menu Groups Tab
- Main Menu Visit Tab
- Main Menu SMS Tab
- Main Menu Email Tab

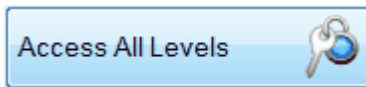
**Create SMS Account**



Press this button to take you to the SMS Global web page to get started on creating a new SMS account for

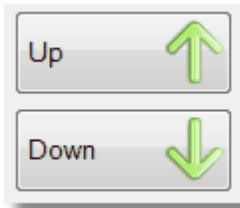
sending text messages from Pastoral Care.

### Access All Levels



Press this button to automatically set the selected username to access all areas of Pastoral Care.

### Sort



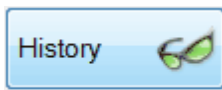
Use these buttons to sort the list of Usernames.

### Delete



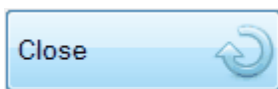
Delete the selected Username.

### History



Press this to view a Historical Record of times the selected Username has accessed Pastoral Care.

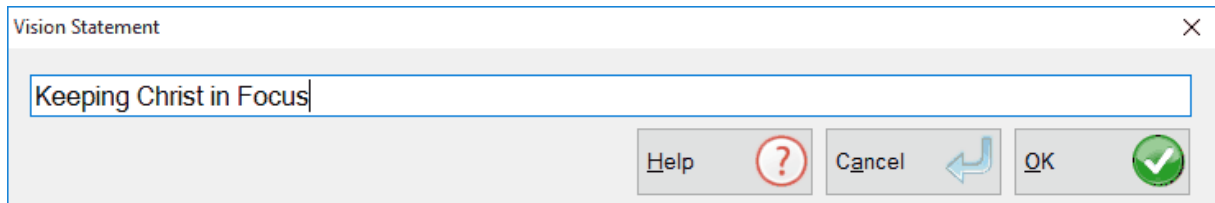
### Close



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.



A screenshot of a software dialog box titled "Vision Statement". The dialog box has a close button (X) in the top right corner. Inside the dialog, there is a text input field containing the text "Keeping Christ in Focus". Below the input field, there are four buttons: "Help" (with a question mark icon), "Cancel" (with a blue arrow icon), "OK" (with a green checkmark icon), and a small blue arrow icon pointing left.

## 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

You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)

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.

When you first start the Networking Setup Area, you are presented with an option to use the Setup Assistant. This will step you through the process for setting up Pastoral Care on a network.

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](#)

[Network Setup Window](#)

### 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](http://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.

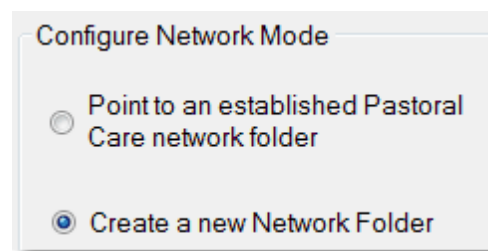
## Network Setup Step by Step

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:

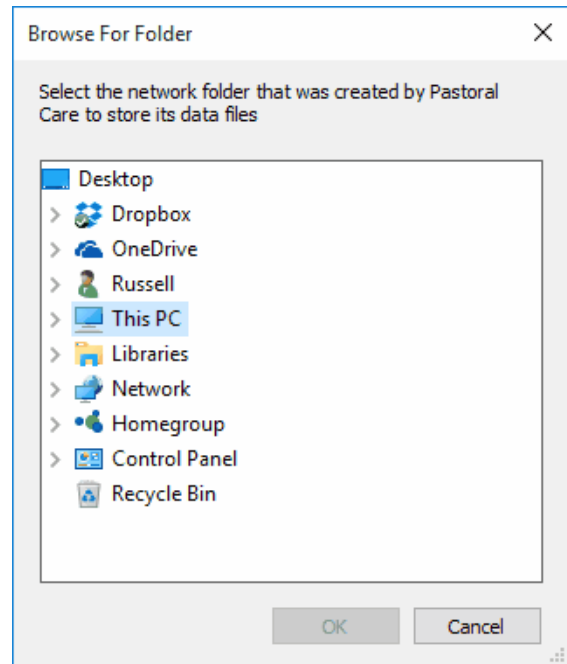
BEFORE SETTING UP A NETWORK, make sure you have a backup of your church data. This is required to restore to the network location after setting up the network.

### Creating your network folders ready for data.

- |        |   |  |
|--------|---|--|
| Step 1 | From the main menu, Go to Setup - Networking  | <i>Do this from the first computer to set up</i> |
| Step 2 | Choose Mode of operation to be <b>Network</b> |  |
| Step 3 | Select Create a New Network Folder            |  |



- Step 4 From the windows browse location, choose your drive / folder 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 drive as the first computer you setup

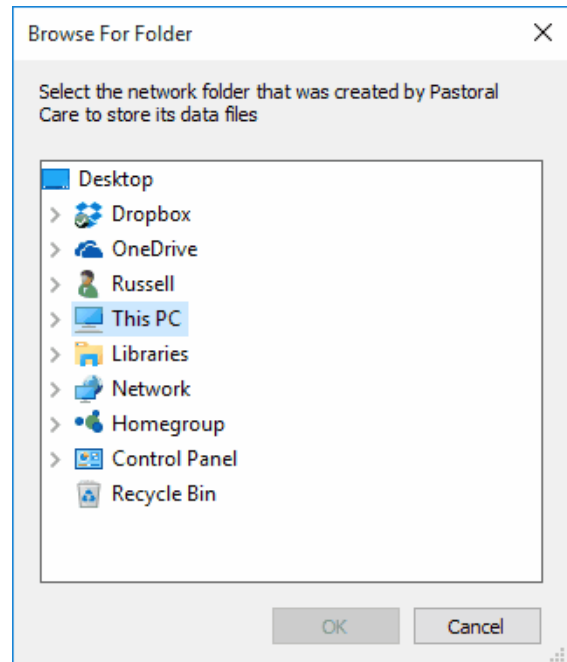
- Step 2 Choose Mode of operation to be **Network**

- Step 3 Choose Point to an established Pastoral Care Network Folder

- Step 4 Press the Select Network Folder button



- Step 5                      Select the drive that you have Pastoral Care mapped on 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 it's 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

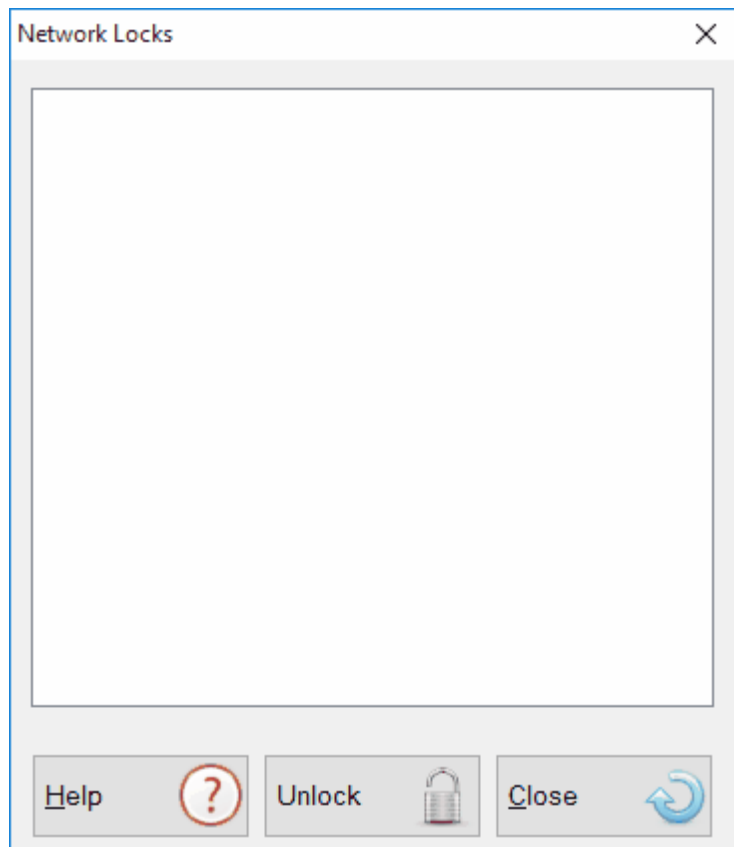
- Multiple users can edit multiple families simultaneously.
- Multiple users can produce any reports simultaneously.
- No limit on the number of Users. (Network and computer hardware dependent).
- All report areas and analysis areas can be accessed by multiple users simultaneously.
- 

## 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.



## Network Setup Window

Below is the network setup window.



Click on the different elements of the window below for full details on each section of the Network Configuration setup area

**Network Configuration**

**Mode of Operation**

Standalone     Network

**Configure Network Mode for this Computer**

Connection Method  LAN (Fastest)     Wi-Fi

Point to an established Pastoral Care network folder

Create a new Network Folder

Network path configured for this edition of Pastoral Care:

Help ? Setup Assistant Setup Assistant Close

### Mode Of Operation

**Mode of Operation**

Standalone     Network

Standalone is the setup needed for one computer, if you are wanting to use Pastoral Care on a network, select the Network mode.

See [Network Setup Step by Step](#) for more details.

### Configure Network Mode

**Configure Network Mode for this Computer**

Connection Method  LAN (Fastest)     Wi-Fi

By default, you should be using the LAN feature, however, if you are on WI-FI you can select this for a more robust wireless experience. Using the WI FI option allows for your connection to be tested as you are using Pastoral Care and cope better with an intermittent connection that may occur when moving around your church.

### Point to an established location

Point to an established Pastoral Care network folder

Select this option and press Select Network Folder to select a set of folders already created by Pastoral Care for network storage.

### Select Network Folder

Select Network Folder

Pressing this button lets you browse to an already created network location to connect to.

### Create a new Network Location

Create a new Network Folder

Select this option and you will be prompted to select a mapped network drive for Pastoral Care to create its folders ready for network usage.

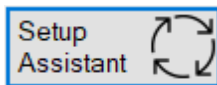
### Network Path

Network path configured for this edition of Pastoral Care:

{This edition is yet to be configured for network mode}

This will display the networking location that has been configured.

### Setup Assistant



Use the Setup Assistant to step you through some easy steps for getting a network setup completed.

## Cloud Guest Configuration

You can find all setup areas from the Main Menu by selecting the Setup Tab. (See also [Setup Introduction](#) for more information on all settings areas in Pastoral Care.)

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](http://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 remote (guest) copy of Pastoral Care automatically when you are internet connected.

### Things you will need for Cloud

#### A Drop Box Account

We recommend Dropbox ([www.dropbox.com](http://www.dropbox.com)) for the sharing of information between computers using Pastoral Care. Simply create a free Drop Box account at [www.dropbox.com](http://www.dropbox.com) and setup the drop box software on each computer that you want to have cloud access to Pastoral Care.

You can use other remote cloud storage drives as well, however our testing has shown that drop box is the most efficient and reliable service for Pastoral Care cloud to run on.

#### 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

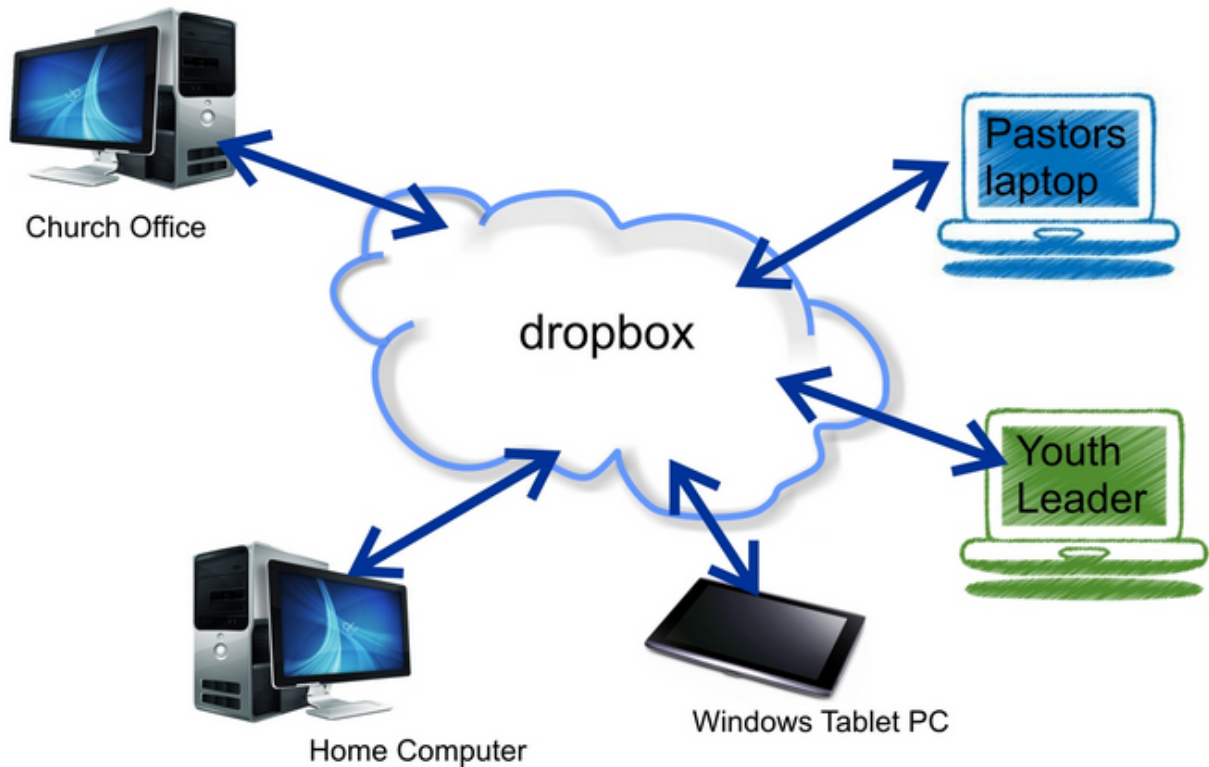
You will need to purchase a license for using the Cloud Service for Pastoral Care. The cost and type of licenses available can be found at : [www.pastoralcare.com.au](http://www.pastoralcare.com.au)

#### 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 virtually impossible for people to intercept your data and be able to read it in any useful form, unless they 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.



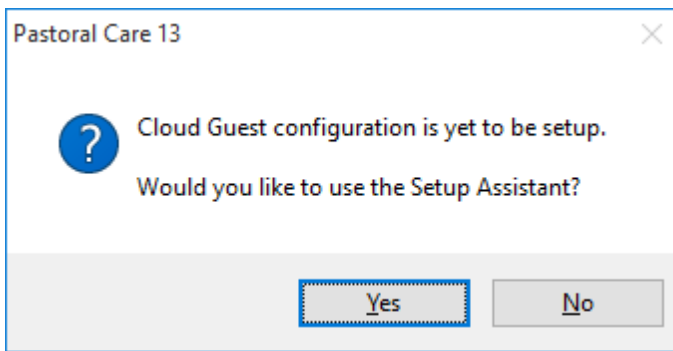
## The Church Network with Cloud

Naturally you can still install Pastoral Care 14 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.

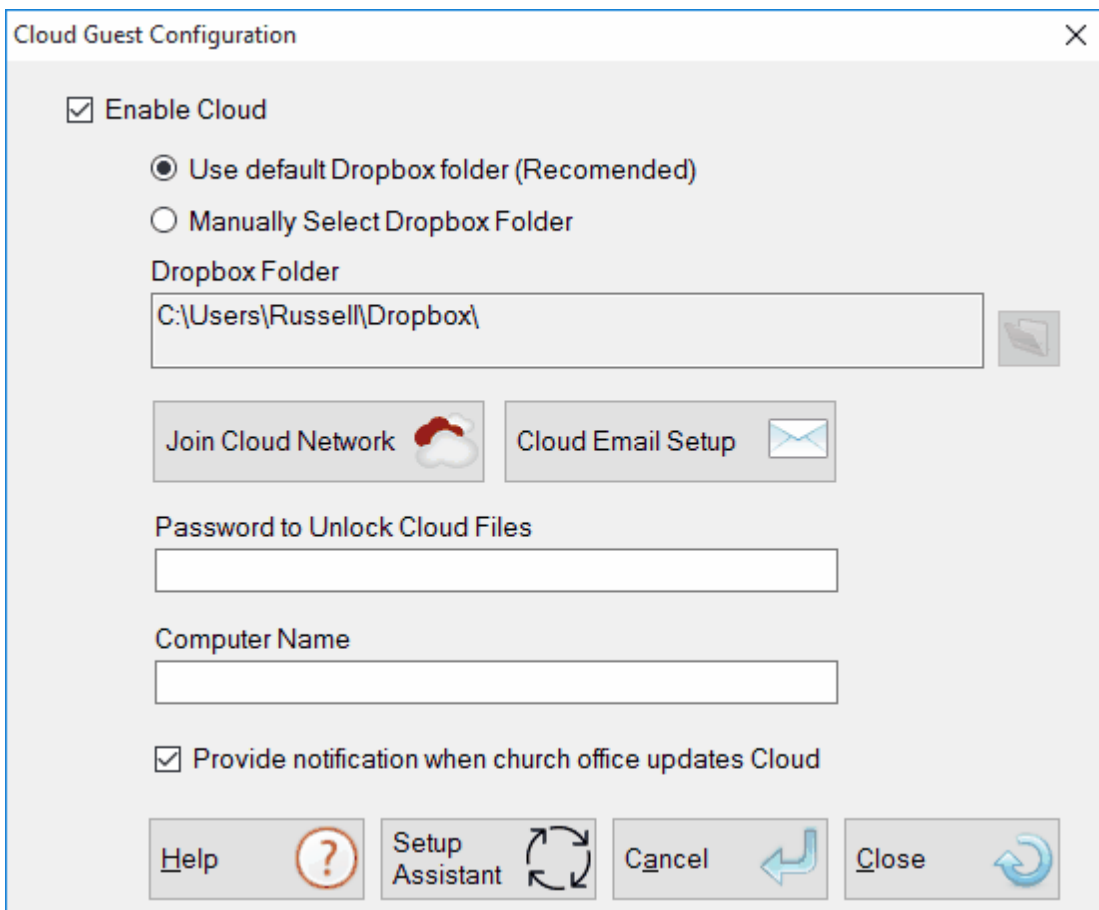
The first time you do this on a computer that has not been setup on cloud, you are offered to use a setup assistant to help you with this task.



We highly recommend that you use the Setup Assistant to help you with this process.

If you want to setup the Cloud Guest settings manually, 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.



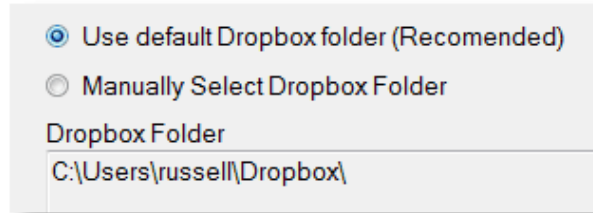
### Enable Cloud

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.

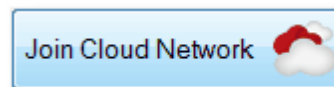


Use default Dropbox folder (Recommended)  
 Manually Select Dropbox Folder

Dropbox Folder  
C:\Users\russell\Dropbox\

## Join Cloud Network

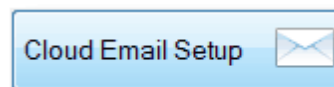
Pressing this button will send a message to the Pastoral Care Cloud Host computer, at your church, that you want to join the Cloud network.



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.



**Click on each area below for more information on these settings.**

Cloud Email Setup
✕

The Following email settings will be used to send emails in Cloud mode as each Cloud Guest will have their own individual email internet provider.

SMTP Server:  Common Providers

Server Authentication Required

Username:

Password:

Mail Authentication Required

Mode: Auto Detect - Highest to Lowest Search ▾

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 
Email Test 
Cancel 
Close

### SMTP Server

SMTP Server:  Common Providers

### Common email provider settings

Press the Common Providers button for a list of suggestions for SMTP server names.

### 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:

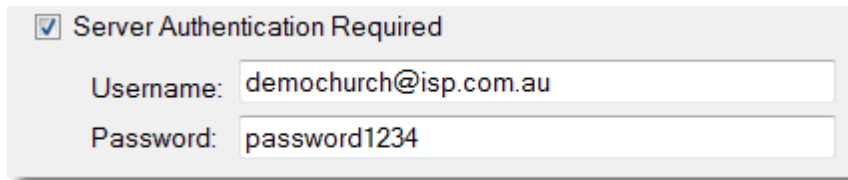
IP Address of your domain server (eg: 192.168.1.19)

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.



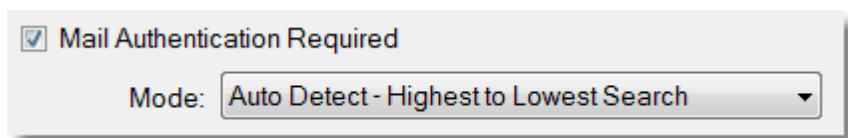
Server Authentication Required

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.

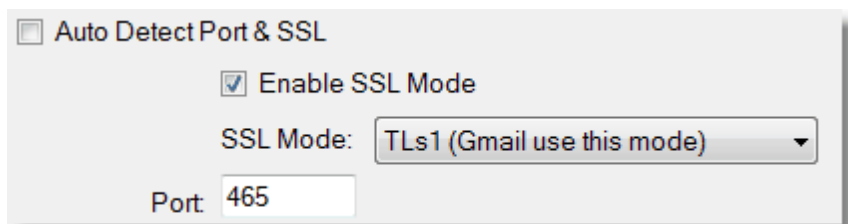


Mail Authentication Required

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:	<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"/>

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

stephen

## 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

russell

## 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 cannot 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](http://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.

# **Chapter**

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**11**

***Appendix***

## Appendix

The following 6 additional programs can all be launched from the [Pastoral Care 14 Resources](#) program installed with Pastoral Care 14. 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\_14\PC14\_Doctor.exe

See [Pastoral Care Doctor](#) for more information

### Pastoral Care Communicator

C:\Program Files\Pastoral\_Care\_Ministries\Pastoral\_Care\_14\PC14\_Communicator.exe

See [Pastoral Care Communicator](#) for more information

### Pastoral Care Personal SMS

C:\Program Files\Pastoral\_Care\_Ministries\Pastoral\_Care\_14\PC14\_Personal\_SMS.exe

See [Pastoral Care Personal SMS](#) for more information

### Pastoral Care Directory

C:\Program Files\Pastoral\_Care\_Ministries\Pastoral\_Care\_14\PC14\_Directory.exe

See [Pastoral Care Directory](#) for more information

### External Backup Program

C:\Program Files\Pastoral\_Care\_Ministries\Pastoral\_Care\_14\PC14\_External\_Backup.exe

See [External Backup Program](#) for more information

### External Restore Program

C:\Program Files\Pastoral\_Care\_Ministries\Pastoral\_Care\_14\PC14\_External\_Restore.exe

See [External Restore Program](#) for more information

### Conversion Utility

C:\Program Files\Pastoral\_Care\_Ministries\Pastoral\_Care\_14\PC14\_Conversion.exe

See [Conversion Utility](#) for more information

## Pastoral Care Doctor

[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 14 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.**

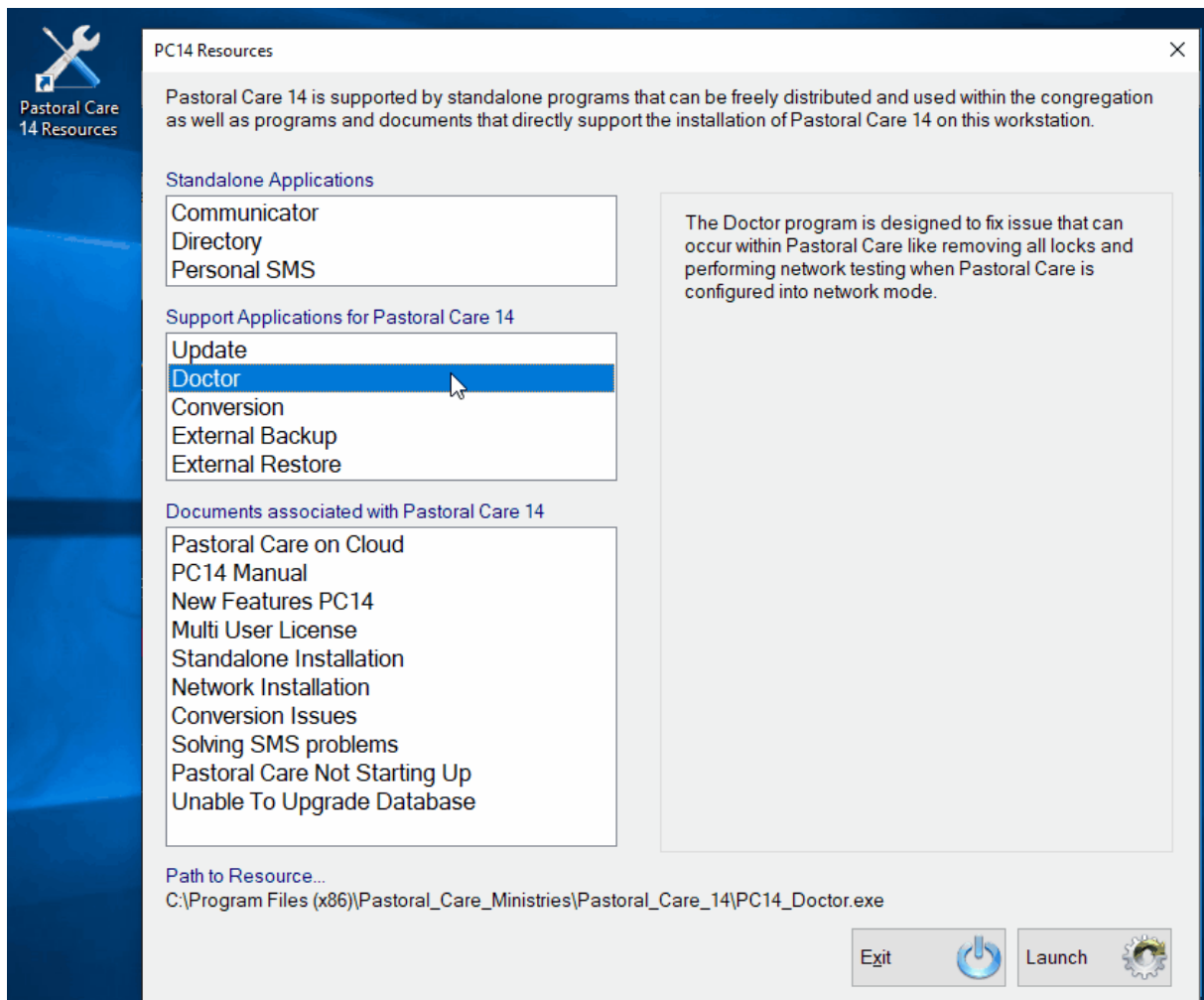
### Installing the Pastoral Care Doctor

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 14 Resources Icon to start the Resource program. From there you can select the Pastoral Care Doctor and press the Launch button to run.

Shown below is the Resources Icon, the Resource program, and the Doctor Menu Item Highlighted.



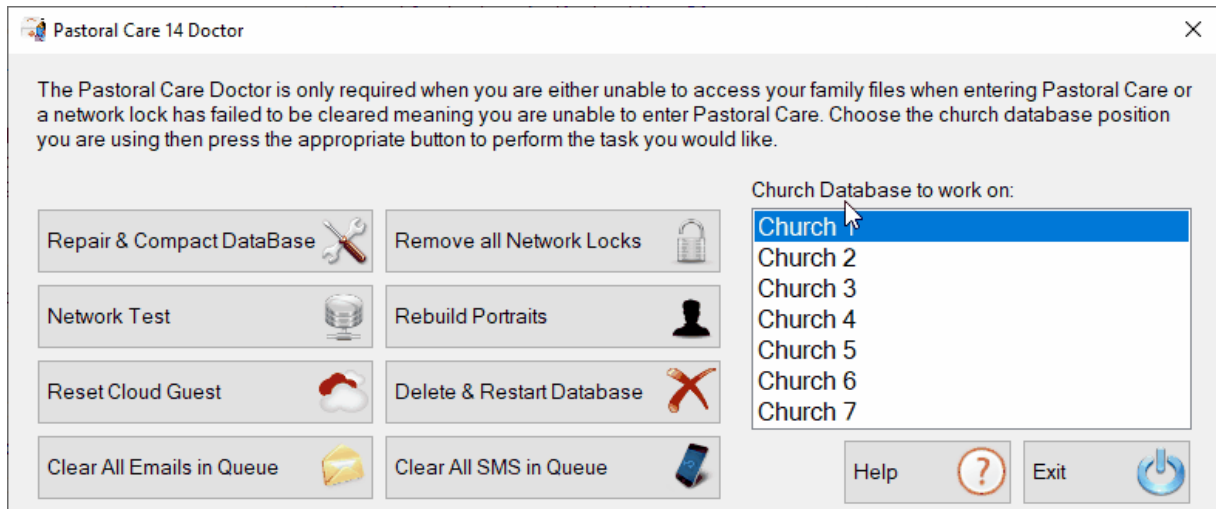
## Using the Doctor Program

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.

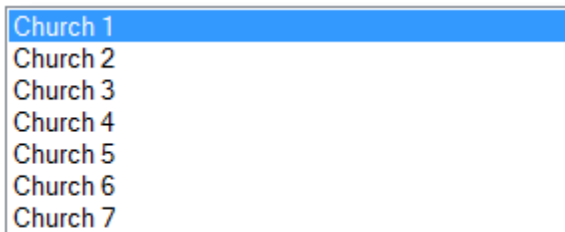


Click on each part of this screen for more details.

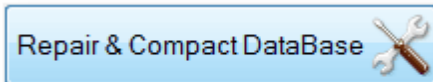


### Church Database Position

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

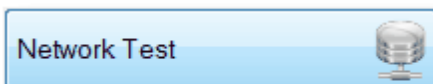


A Network lock is a lock we place on various files and locations / features throughout Pastoral Care when a person is in that area. If they exit Pastoral Care in an unplanned way, or something goes amiss when they are exiting Pastoral Care, that lock can stay in place permanently.

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

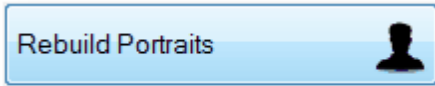




Press the Network Test button to see if your network is performing as it should for Pastoral Care to operate correctly.

This tool is ideal for troubleshooting any issues you might be having when setting up Pastoral Care on a network.

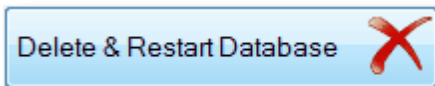
### Rebuild Portraits



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.

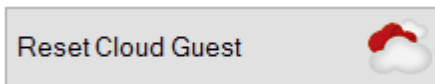
If you want to use this feature, please backup Pastoral Care using the Backup Utility before doing the Rebuild Portrait option. This is important in case something happens that's unexpected during the repair, such as a power failure!

### 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.

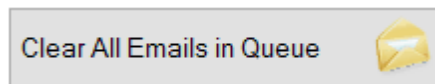
### Reset Cloud Guest



Press this button if the computer you are on is having problems with the Cloud Guest working as expected.

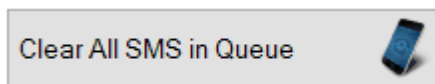
This will reset all local settings and allow a fresh connection to the church to be re-established without doing anything other than pressing this button. There is a small chance that synchronization data from the local computer could be lost, but highly unlikely.

### Clear Email Queue



Press this to completely empty the email queue. This is useful if there is a problem with the local emails from your computer, and you cannot open the email program / email queue program from Pastoral Care to clear the queue.

### Clear SMS Queue



Press this to completely empty the SMS queue. This is useful if there is a problem with the local SMS messages from your computer, and you cannot open the SMS program / SMS queue program from Pastoral Care to clear the queue.

## Pastoral Care Communicator

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 download it from our web site.

### Starting Communicator

Find the Pastoral Care 14 Resources Icon to start the Resource program. From there you can select the Communicator program and press the Launch button to run.

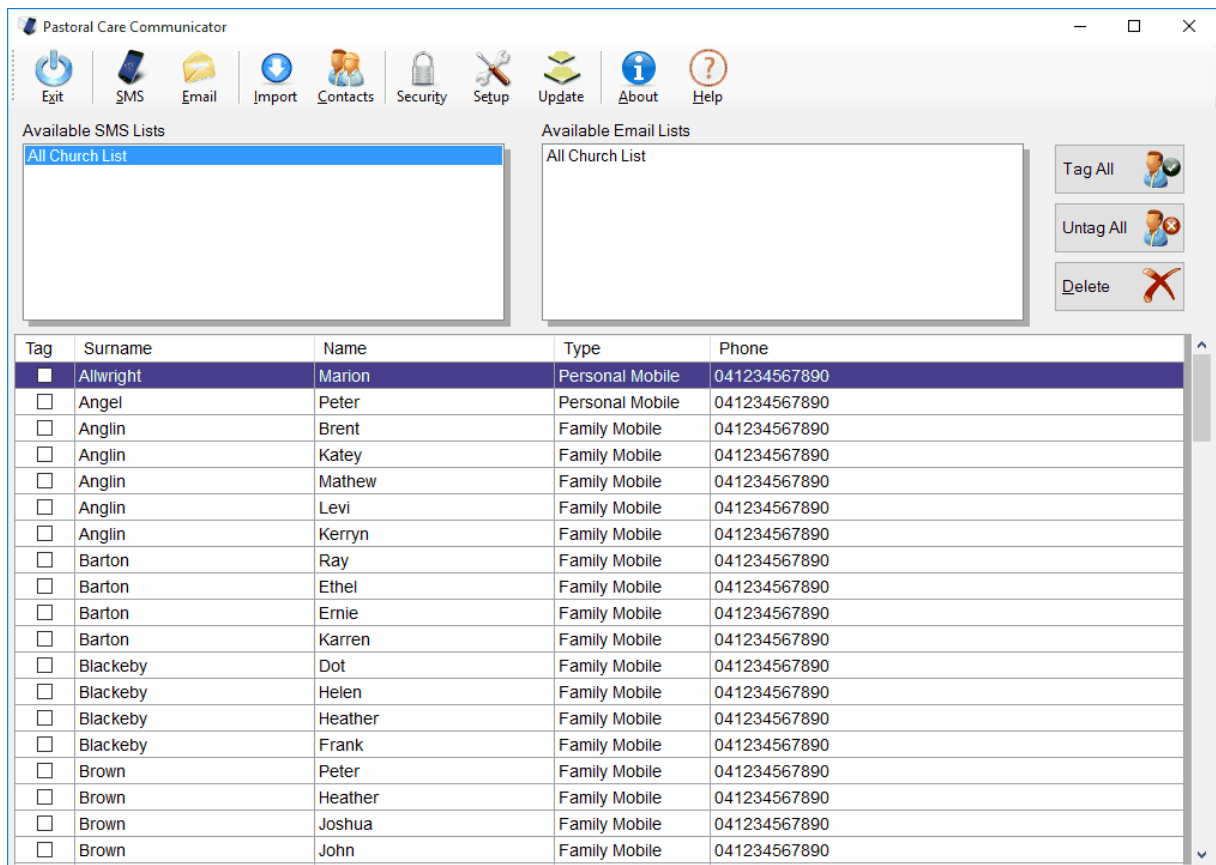
### Using Communicator

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.

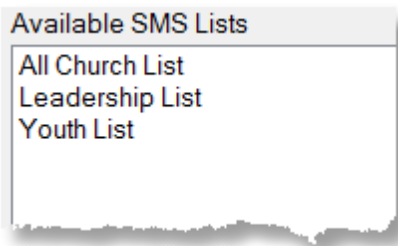


Click on each part of the Communicator window below to learn more about this program.



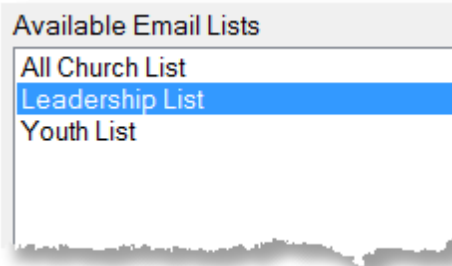
### Available SMS Lists

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

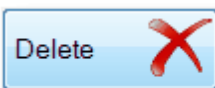
When you have selected a list, people from that list are displayed in the [Select People](#) area. People that you tag **in each** list are permanently tagged or remembered for use again next time you start the Communicator.

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.

Pastoral Care Communicator SMS

Close Send Given Surname Clear Spell Save Retrieve History Test Account Help

PC14 Lists Personal Contacts

Available Lists All Church List

Tag	Surname	Given	Type	Phone
<input checked="" type="checkbox"/>	Allwright	Marion	Personal Mobile	041234567890
<input checked="" type="checkbox"/>	Angel	Peter	Personal Mobile	041234567890
<input checked="" type="checkbox"/>	Anglin	Brent	Family Mobile	041234567890
<input checked="" type="checkbox"/>	Anglin	Katey	Family Mobile	041234567890
<input type="checkbox"/>	Anglin	Mathew	Family Mobile	041234567890
<input type="checkbox"/>	Anglin	Levi	Family Mobile	041234567890
<input type="checkbox"/>	Anglin	Kerryn	Family Mobile	041234567890
<input type="checkbox"/>	Barton	Ray	Family Mobile	041234567890
<input type="checkbox"/>	Barton	Ethel	Family Mobile	041234567890
<input type="checkbox"/>	Barton	Ernie	Family Mobile	041234567890

SMS Message  Include PC14 Lists'  Include 'Personal Contacts'

Hi [Given], just a quick reminder for the BBQ at the Grahams Place this coming Saturday Evening.

Return ID:

Account Details: Credit Available: \$0.00, Txt's Available: 0, Estimate Cost:

Smsglobal Status: Unable to Establish Connection

Current Message: Tagged: 4, Txt's to Send: 4, Cost: \$0.00

Current Message: Est Characters: 96, Est Txt: 1

Scheduling:  Enable SMS Scheduling, Daylight Saving  01:07 PM, Sunday, 3 January 2016

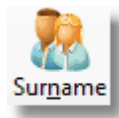
## Toolbar



When you are ready, press the Send button to send your entered message to the selected List / People



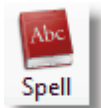
Insert the Given Name of the recipient in the message. This is ideal for personalising each message.



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



Erase the currently composed message.



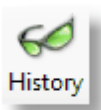
Access the Spell Checker Settings



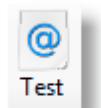
Save the current message as a template for re-use.



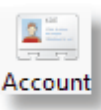
Load in a Saved message so you can send it again.



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



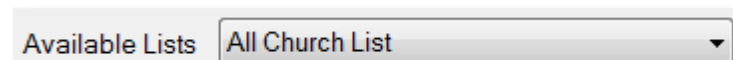
Press the Account button to load the SMS global web page where you can login to your SMS Global Account using your SMS Global Username and Password etc.

### Lists and Contacts



Use the PC14 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 'PC 14 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

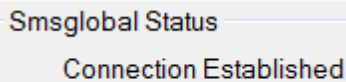
Hi [Given], just a quick note to remind you about the special Members meeting on Thursday night.

### 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](http://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 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

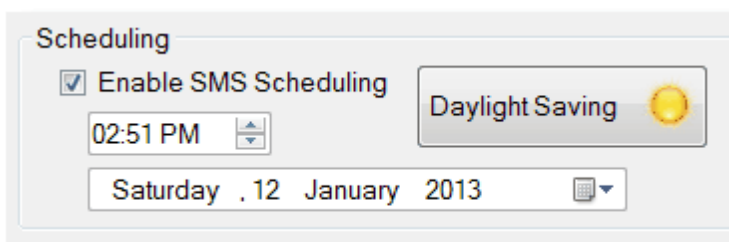
If you are sending all messages to people in the same time zone, then the date and time shown in the Scheduling area is the date and time the message will be sent. If some people are not in your current time zone, please have consideration for when the message might arrive!

## 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.




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

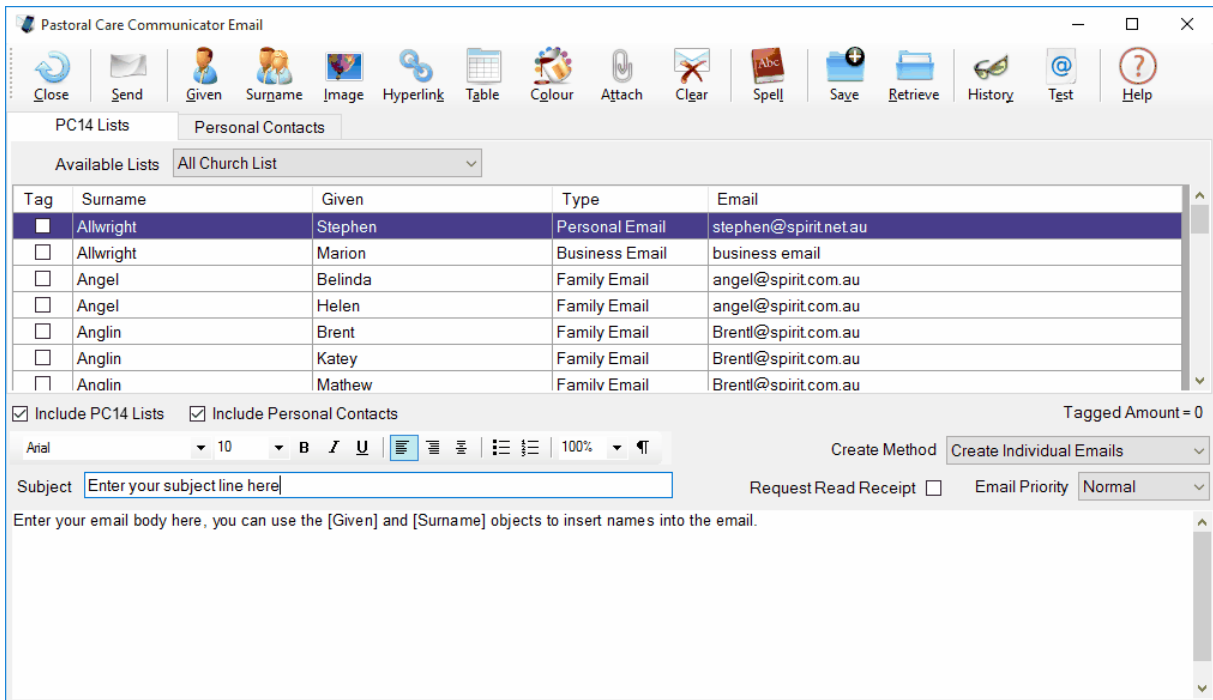
### Email



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.





**Toolbar**

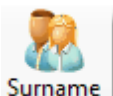
Shown below are each of the Toolbar items on the Compose Email area of The Email Manager,


- 


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.
- 

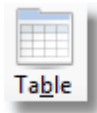
Save an email as a template for later re-use. Rather like a permanent draft copy that you can re-use over and over again.
- 

Insert an Image into the email.
- 

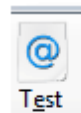
Load in a saved email for use. Naturally the loaded email can be edited and changed if required.
- 

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.



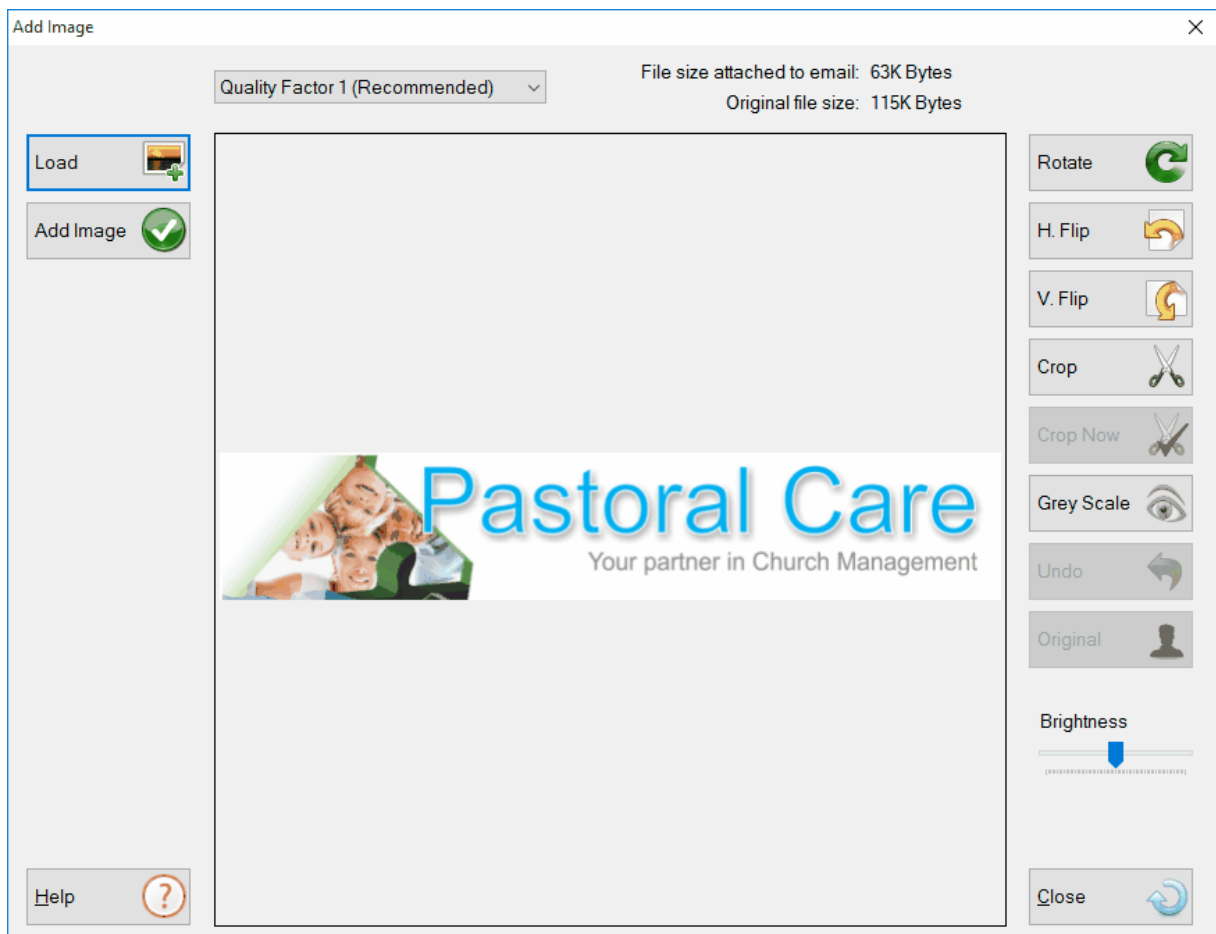
Manually send the composed email to an email address you enter to try out your email.



Set the colour of your text or background of text to any colour you desire!

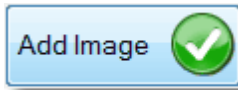
## Image

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.

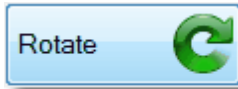




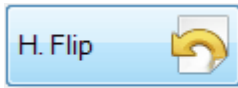
Load an image from a file to be added to the email.



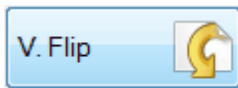
Add the selected (and modified if you have done any modifications) image to the current position in the email. Note once an image has been added, you can re-size the image directly in the email using the mouse to click and drag the corners of the image.



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



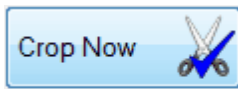
Flip the picture (mirror) horizontally.



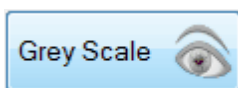
Flip the picture (mirror) vertically.



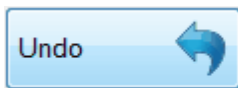
Select an area of the picture to crop.



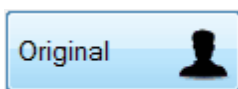
After marking an area with Crop, press the Crop Now button to complete the crop.



Convert the picture to grey tones only.



Where available, you can press this to undo the last edit to the picture.



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



Adjust the brightness of the picture.

Quality Factor 1 (Recommended) ▾

File size attached to email: 20K Bytes

Original file size: 49K Bytes

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.



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.

**Create Hypertext Link**

**Link text**  
Enter text to be displayed for the link

**Link location**  
Enter a web page location for the hyperlink

### Lists and Contacts

PC14 Lists

Personal Contacts

Use the PC14 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

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 'PC14 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.



Subject

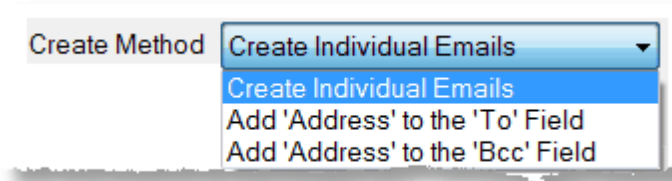
Enter your Email here, you can include [Given] and [Surname] objects for personalising your message.

### 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 the 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!

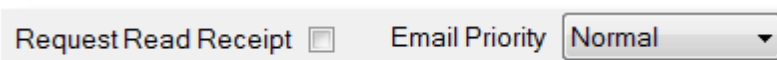
## Add Address to the To Field

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





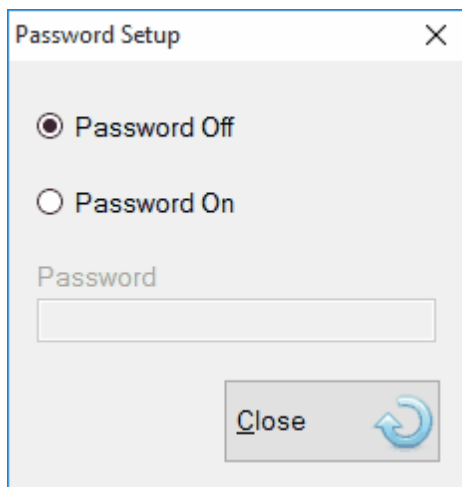
Press the Import button to let you import SMS and Email List data from Pastoral Care. A Communicator data file can be created by using the Export Feature on the Explore Tab of Pastoral Care.

## Security

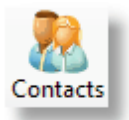


Turn Security on if you want to assign a password to restrict access to this program.

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

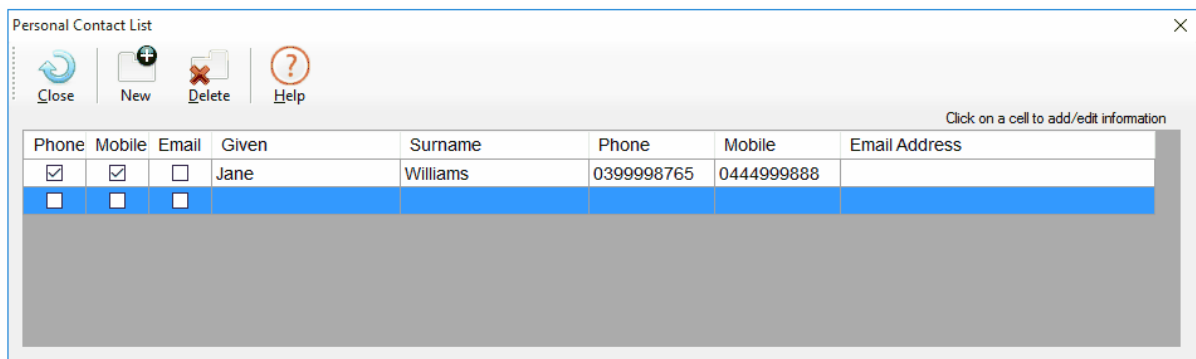
To add a new contact, press New, and click in each field to add data. Information is saved automatically.

### 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 | Email 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.smsglobal.com](http://www.smsglobal.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.

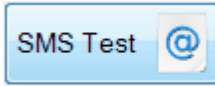
NOTE: At the time of publishing, [www.smsglobal.com.au](http://www.smsglobal.com.au) were offering their accounts free of sign up costs, no ongoing account fees, and 25 free text messages to get you started. This can change without notice, but has been a standard account setup feature for many years.

### 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.

Setup

SMS Setup | Email Setup

Outgoing SMTP Mail 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

## SMTP Server

SMTP Server:

## Common SMTP settings

The most common SMTP server names can be selected by pressing Common Providers.

## 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

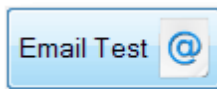
### Individual Email Restriction

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 Personal SMS

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 download it from our web site.

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 14 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

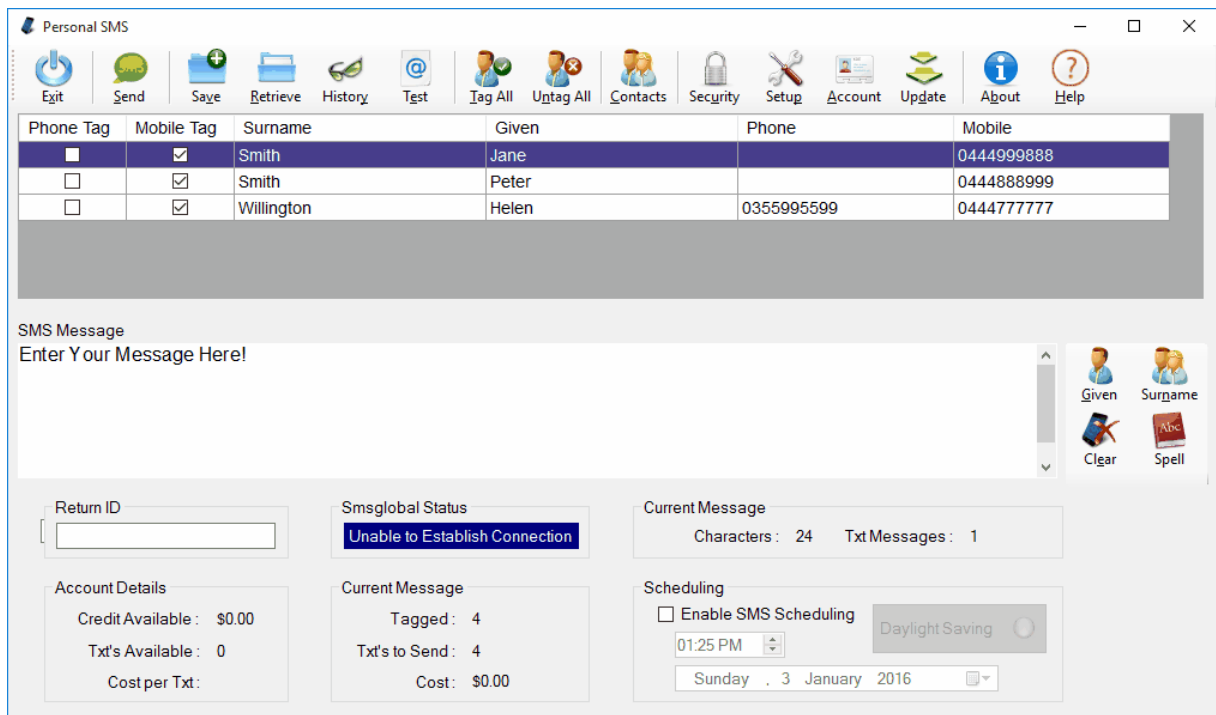
The basic steps for using Personal SMS are :

- Create your own person SMS account with [www.msglobal.com.au](http://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 checked="" type="checkbox"/>	Smith	Jane		0444999888
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Smith	Peter		0444888999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Willington	Helen	0355995599	0444777777

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: \$0.00

Current Message:  
Tagged: 4  
Txt's to Send: 4  
Cost: \$0.00

Scheduling:  
 Enable SMS Scheduling  
Daylight Saving:   
01:25 PM  
Sunday, 3 January 2016

## Toolbar



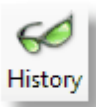
When you have selected the people to send a message to, press the Send button to send your message.



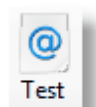
Save the current message as a template for re-use.



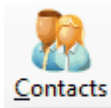
Load in a Saved message so you can send it again.



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



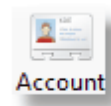
[See Contacts](#) for information on how to add people to the Personal SMS program



[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.



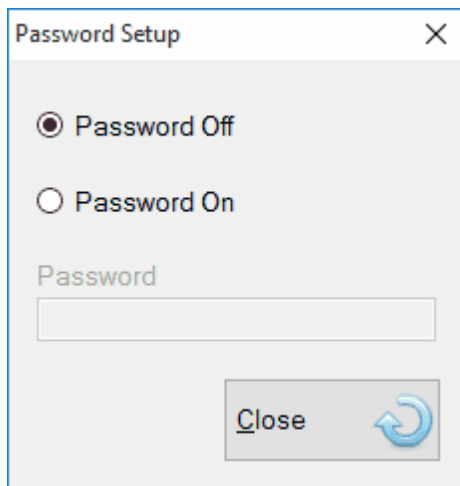
Press this button to check for program updates from time to time. Updates are fast and simply to apply, simply press this button and follow the easy on screen prompts.

## Security

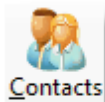


Turn Security on if you want to assign a password to restrict access to this program.

Please note, do NOT forget your password, it cannot be hacked in anyway.



## Contacts



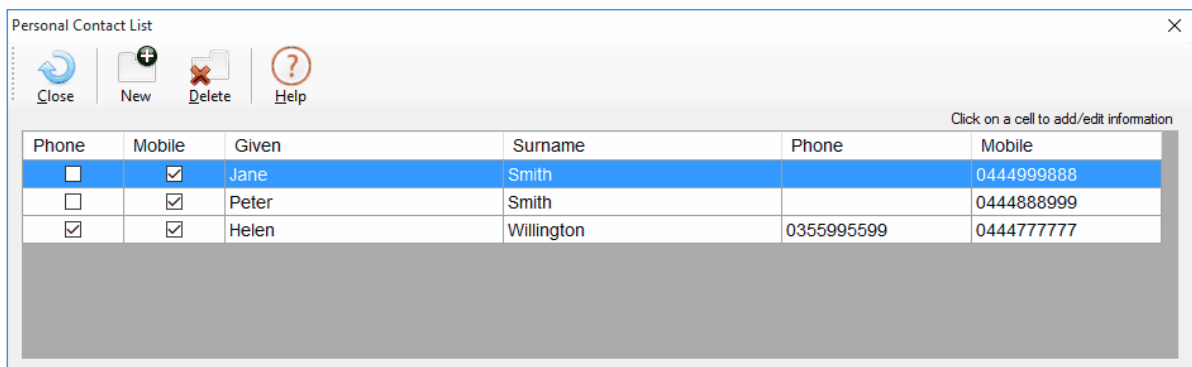
Use the Contacts feature to add your own contacts into the Communicator program. These people can also be sent SMS and Emails from this program.



Press New to add a new personal contact to the Communicator program.



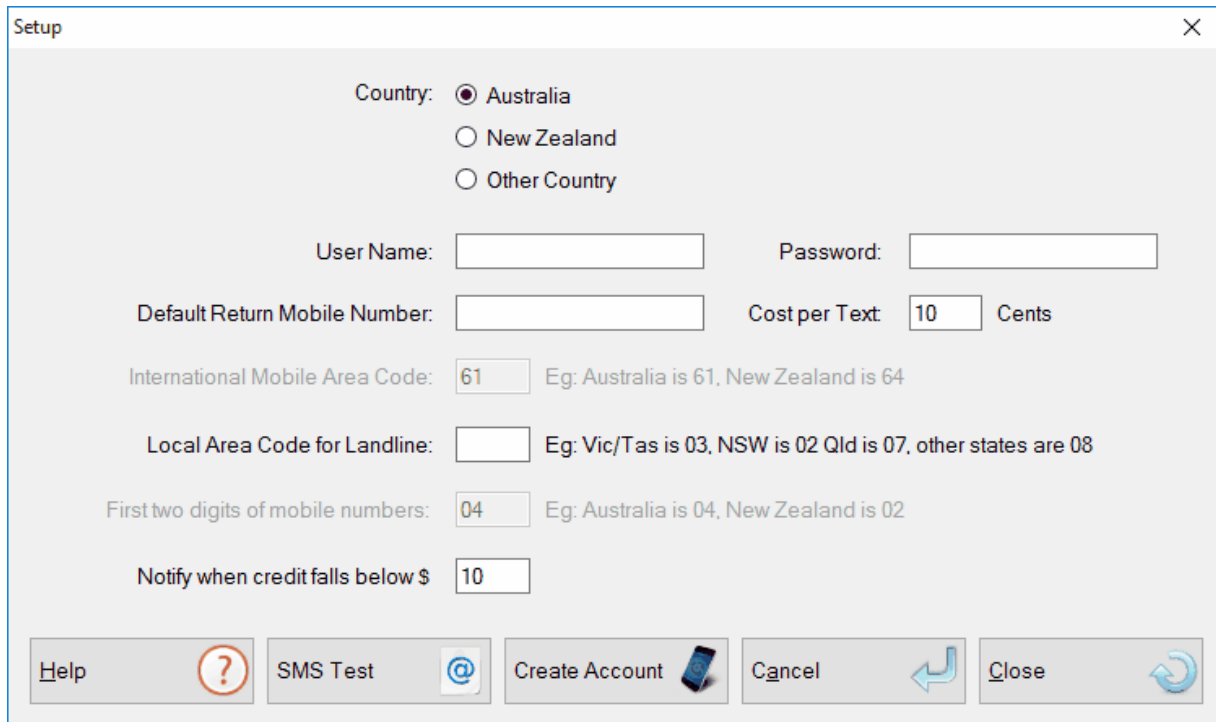
Press Delete to remove the highlighted personal contact from the Communicator program.



## 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.



Setup

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  Create Account  Cancel  Close 

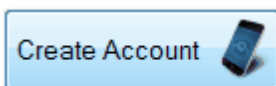
## How to Setup SMS

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.msgglobal.com](http://www.msgglobal.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.

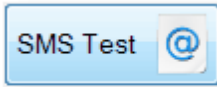
NOTE: At the time of publishing, [www.msgglobal.com.au](http://www.msgglobal.com.au) were offering their accounts free of sign up costs, no ongoing account fees, and 25 free text messages to get you started. This can change without notice, but has been a standard account setup feature for many years.

## 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.

## 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](http://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 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

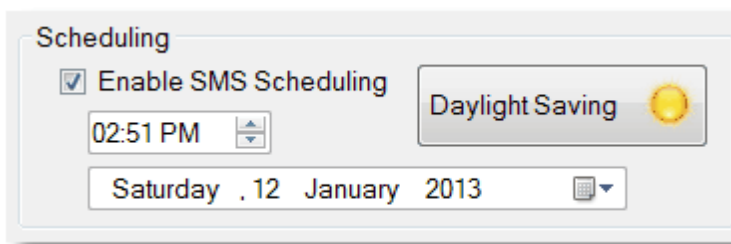
If you are sending all messages to people in the same time zone, then the date and time shown in the Scheduling area is the date and time the message will be sent. If some people are not in your current time zone, please have consideration for when the message might arrive!

## 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

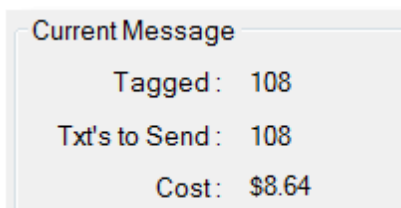
02:51 PM

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

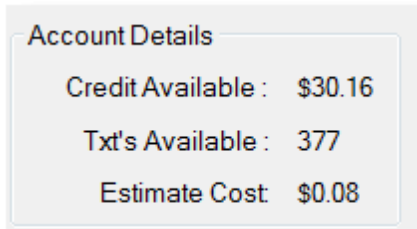
Tagged : 108

Txt's to Send : 108

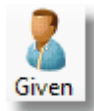
Cost : \$8.64

## Account Details

This area shows you the current SMS Global account balance and how many SMS messages you can send on your current balance.

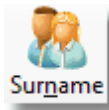


## Given



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 Directory

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 14 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.

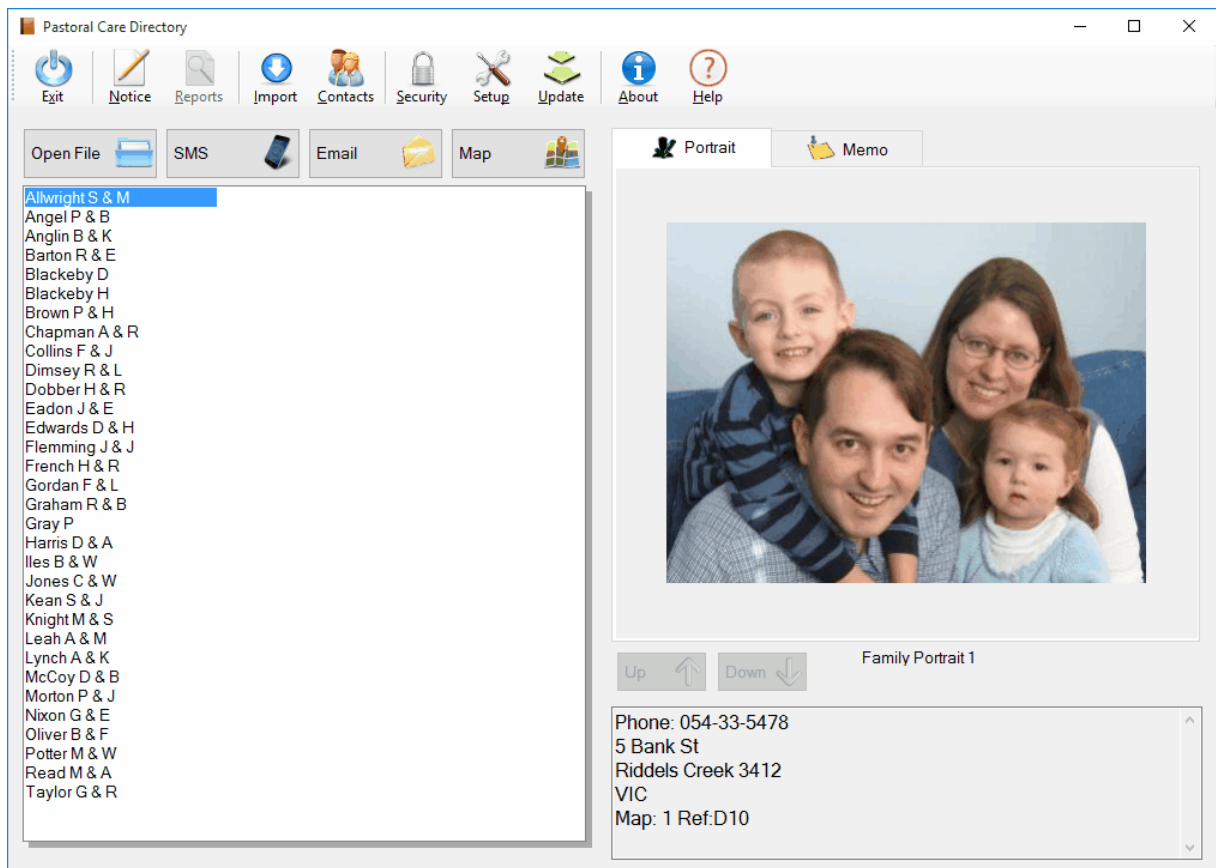
If the Resource program is not installed on your computer, look for the Directory Icon on your desktop, or on your start menu.

### 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.



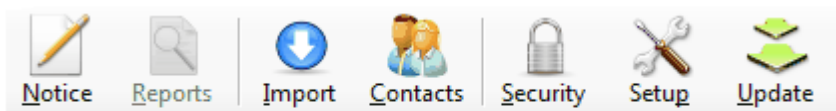
Shown below is the Directory Program main window, click on each part of this window to learn more.



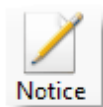
## Toolbar



Click on each toolbar icon below to learn more about each feature in the Directory program Toolbar.

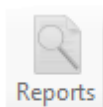


## Notice



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

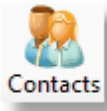
Care directory Export.

**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**

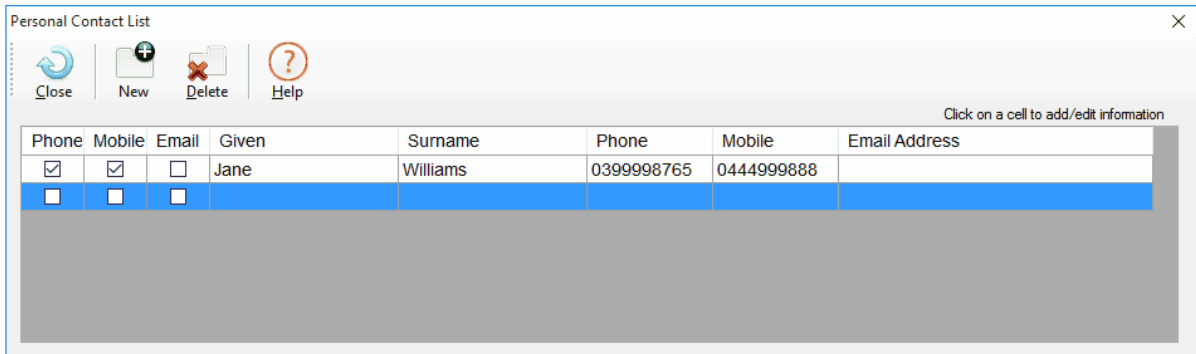
To add a new contact, press New, and click in each field to add data. Information is saved automatically.

**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.

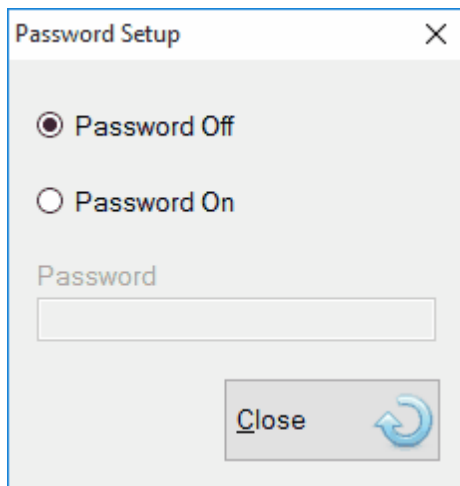


**Security**



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 | Email 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

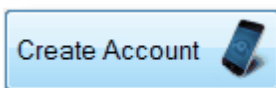
Notify when credit falls below \$

Help  SMS Test  Email Test  Cancel  Close 

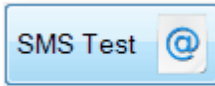
For first time setup follow these simple steps.

1. Press the Create Account button in the SMS Setup Area.
2. A Web Page should open to [www.msglobal.com](http://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](http://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.



Press this button to be taken to the SMS Global Web Site for creating an SMS Account.



Press this button to allow you to quickly type a test message and send it to a manually entered mobile phone.

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

User Name:  Password:   
 Default Return Mobile Number:  Cost per Text:  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:

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 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 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 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 Setup



Click on each part of the window below to learn more about the Email setup area for Communicator.

Setup

SMS Setup | **Email Setup**

Outgoing SMTP Mail 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

SMTP Server:

## Common SMTP settings

The most common SMTP server names can be selected from the Common Providers button.

## 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.

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 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:

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:

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.

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:

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

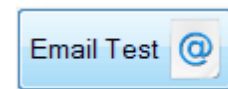
All email in Pastoral Care is now managed by a separate program called the Email Queue. You don't have to start this, it starts automatically. When using Email Delay, all emails are sent from Pastoral Care, immediately to the Queue program. This frees up Pastoral Care and your computer for doing other 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.

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



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..

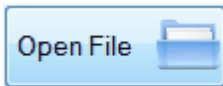
Australian  New Zealand

## 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

**Surname**  
Allwright

**Phone**  
054-33-5478

Up ↑    Down ↓


**Adult**  
Stephen  
Marion

**Child**

**Stephen's Personal Details**

Gender: Male  
 Title: Mr.  
 Birth Date: 3/07/1962  
 Mobile: 041234567890  
 Email: stephen@spirit.net.au  
 Occupation: Plumber  
 Business Phone: 018-998725

**Family Portrait 1**



**Family Contact details**

**Address**

Home Address-

5 Bank St  
 Riddels Creek 3412  
 VIC  
 Map: 1 Ref:D10

## 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.

Pastoral Care Directory SMS (Allwright)

Close Send Given Surname Clear Spell Save Retrieve History Test Account Help

Family Contact Personal Contacts

Tag	Surname	Given	Phone Type	Phone
<input checked="" type="checkbox"/>	Allwright Family		Family Phone	054-33-5478
<input type="checkbox"/>	Allwright	Stephen	Personal Mobile	041234567890
<input type="checkbox"/>	Allwright	Stephen	Business Phone	018-998725
<input type="checkbox"/>	Allwright	Marion	Personal Mobile	041234567890
<input type="checkbox"/>	Allwright	Marion	Business Phone	054-229876

SMS Message  Include Family Contact  Include 'Personal Contacts'

Return ID:

Account Details: Credit Available: \$0.00, Txt's Available: 0, Cost per Txt:

Smsglobal Status: Unable to Establish Connection

Current Message: Tagged: 0, Txt's to Send: 0, Cost: \$0.00

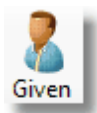
Current Message: Characters: 0, Txt Messages: 0

Scheduling:  Enable SMS Scheduling, Daylight Saving:  03:09 PM, Sunday, 3 January 2016

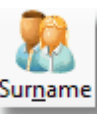
## Toolbar



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.



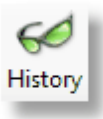
Access the Spell Checker Settings



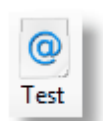
Save the current message as a template for re-use.



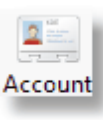
Load in a Saved message so you can send it again.



Show the details of the last 200 SMS messages sent.

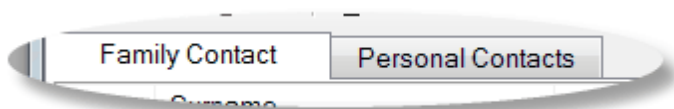


Send a test SMS message. This will cost you for the test message as you are actually sending a TXT message via SMS global to a manually entered Mobile Phone Number



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

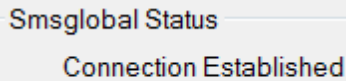
#### SMS Message

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](http://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 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

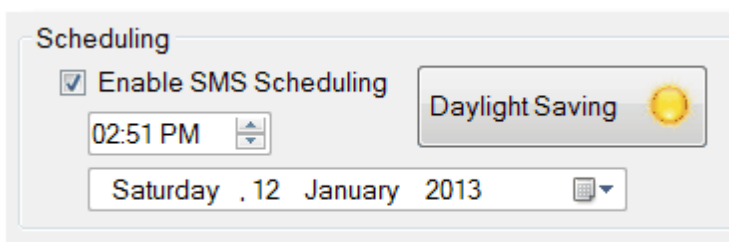
If you are sending all messages to people in the same time zone, then the date and time shown in the Scheduling area is the date and time the message will be sent. If some people are not in your current time zone, please have consideration for when the message might arrive!

## 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.

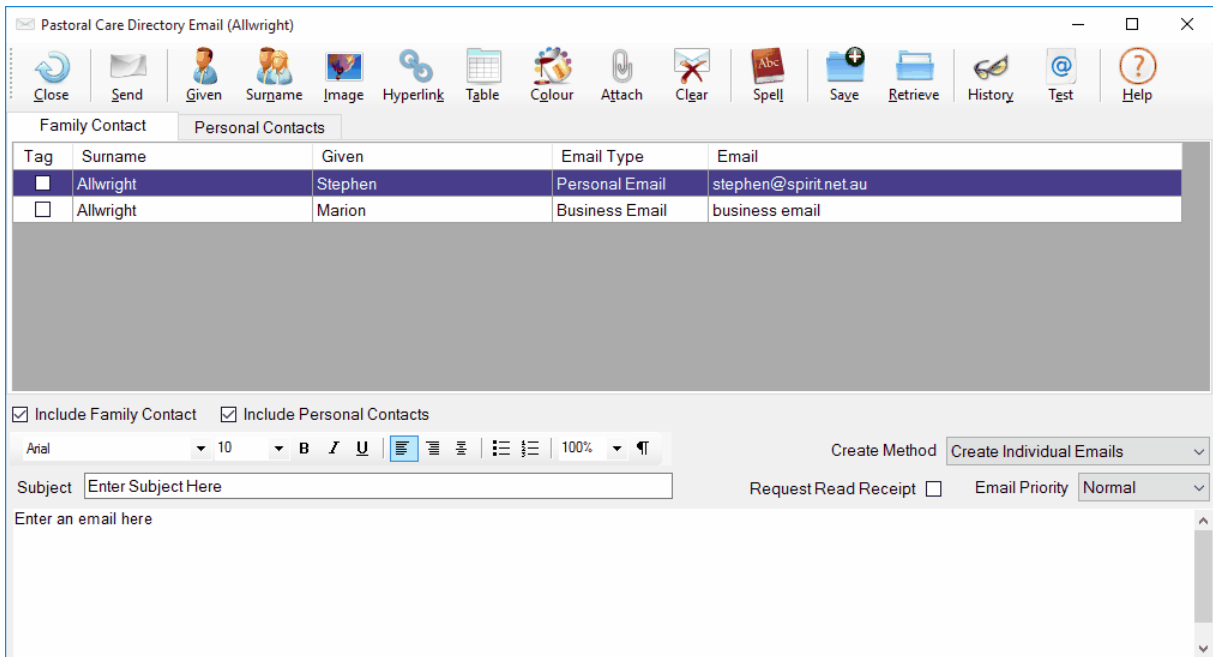
Account Details	
Credit Available :	\$30.16
Txt's Available :	377
Estimate Cost :	\$0.08

### 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**

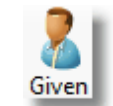
Shown below are each of the Toolbar items on the Compose Email area of The Email Manager,



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.



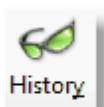
Insert an Image into the email. See [Image](#) for more details on this.



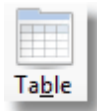
Load in a saved email for use. Naturally the loaded email can be edited and changed if required.



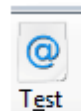
Insert text as a Hyperlink into the email. See [Hyperlink](#) for more details.



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.

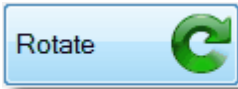




Load an image from a file to be added to the email.



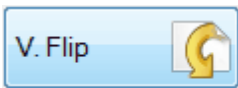
Add the selected (and modified if you have done any modifications) image to the current position in the email. Note once an image has been added, you can re-size the image directly in the email using the mouse to click and drag the corners of the image.



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



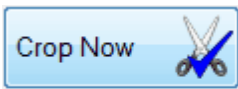
Flip the picture (mirror) horizontally.



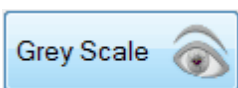
Flip the picture (mirror) vertically.



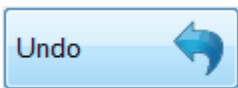
Select an area of the picture to crop.



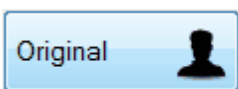
After marking an area with Crop, press the Crop Now button to complete the crop.



Convert the picture to grey tones only.



Where available, you can press this to undo the last edit to the picture.



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



Adjust the brightness of the picture.

Quality Factor 1 (Recommended) ▾

File size attached to email: 20K Bytes

Original file size: 49K Bytes

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.



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.

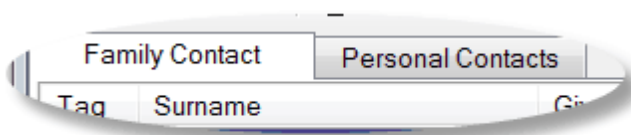
Create Hypertext Link

Link text  
Enter text to be displayed for the link  
See our web site for details

Cancel ↩ OK ✓

Link location  
Enter a web page location for the hyperlink  
<http://www.ourchurchweb.org.au>

### 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

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 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

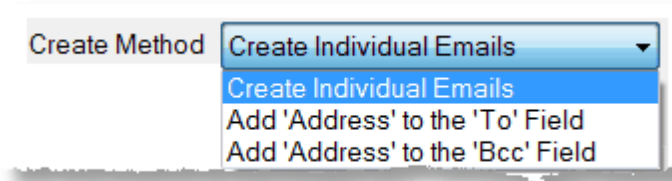
Enter your Email here, you can include [Given] and [Surname] objects for personalising your message.

### 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.



## 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!

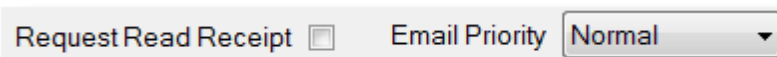
## Add Address to the To Field

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 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.

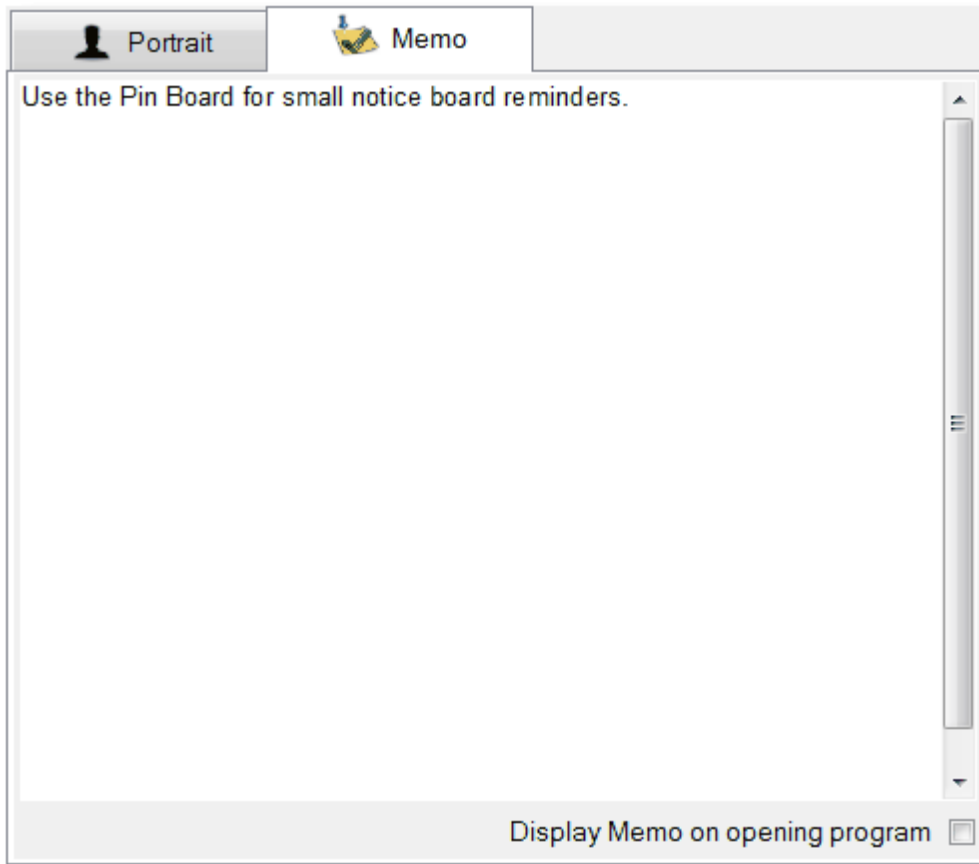
## Portrait

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.



## External Backup Program

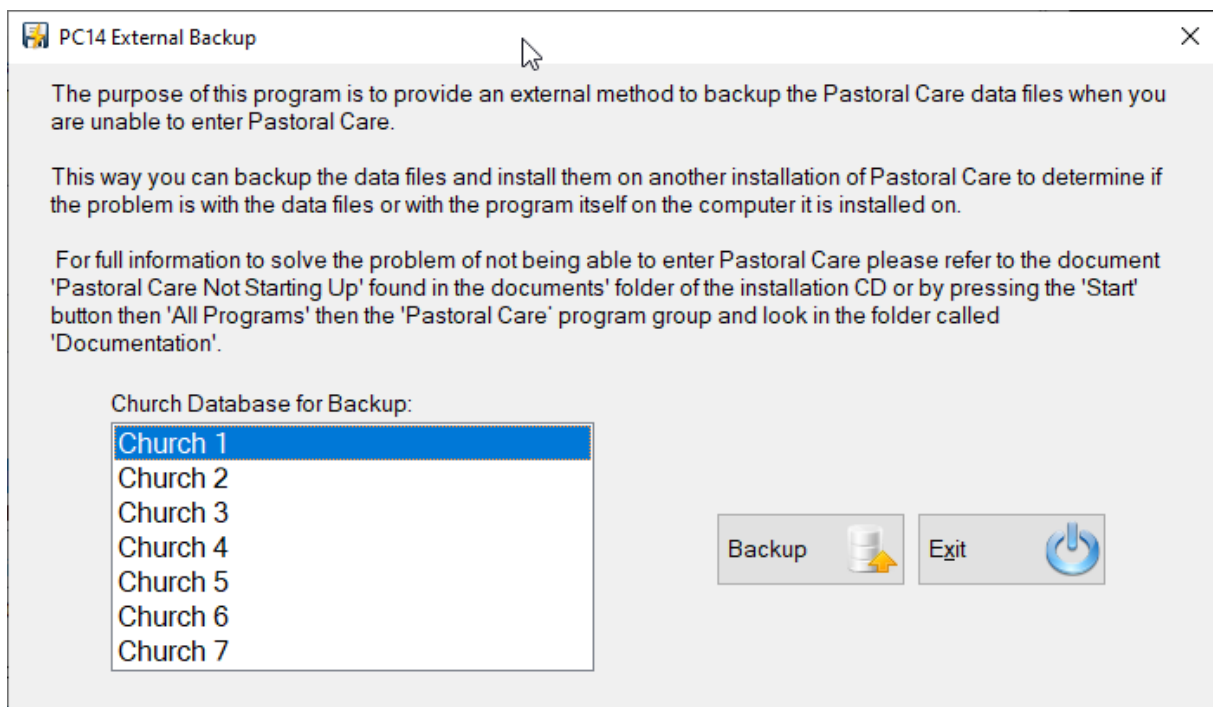
The External Backup Program is an important program designed to assist you in getting a backup of your data even when Pastoral Care won't start. This is not a very common problem that we expect you to have, however, if for some reason, Pastoral Care becomes un-usable, you can use this program to create 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 14 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.



## External Restore Program

The External Restore Program is an important program designed to assist you in restoring a backup of your data even if you cannot 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!

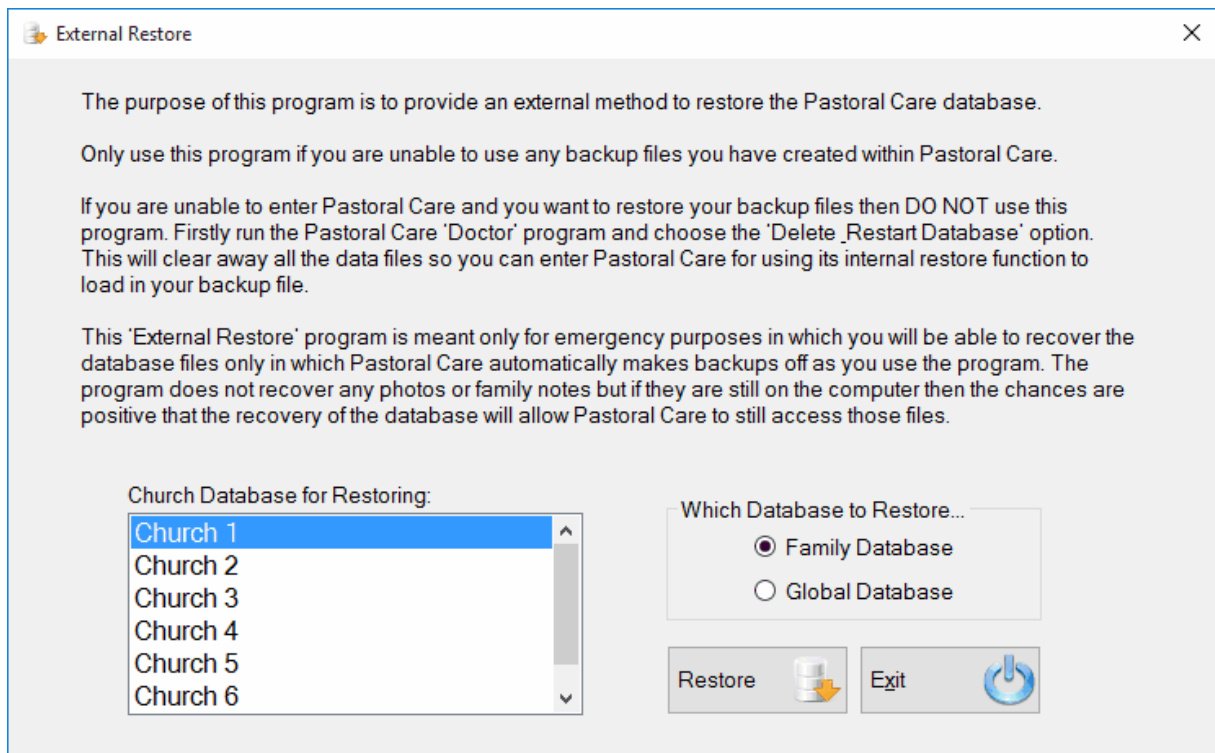
### Starting the External Restore Program

Find the Pastoral Care 14 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.

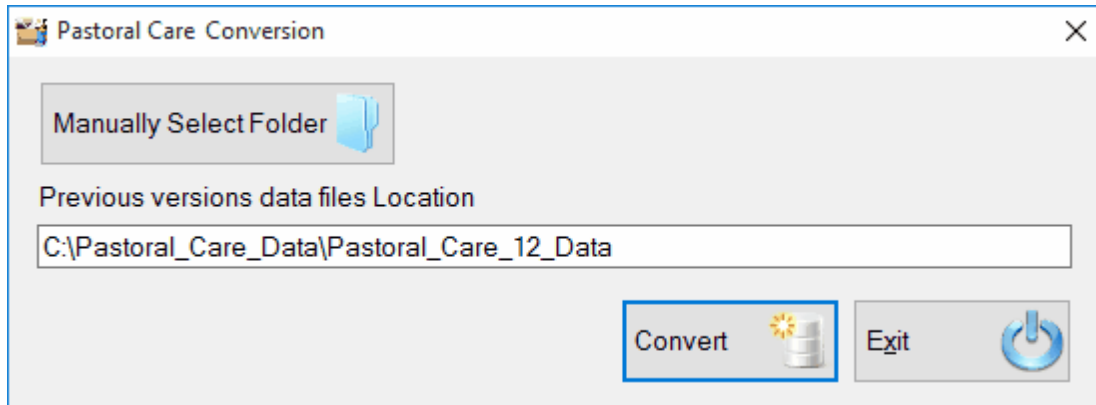


## Conversion Utility

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, Pastoral Care 12 & Pastoral Care 13

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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