ChurchWatch

Church Management Software for Windows®

Productivity *Plus*
Version 2

White
Mountain
Software

User's Guide

ChurchWatch Version 2 User's Guide

Productivity...Plus

First Edition
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- Table of Contents -

Chapter 5 - Import and Export Managers

Chapter 6 - Lists

Chapter 7 - Security and User Name Maintenance

Chapter 10 - The Giving and Tax Receipt Managers

Chapter 11 - The Pledge Manager

Chapter 27 - Support

Appendix A - Table Structures

Chapter 1 - Installation and Overview

Thank you for purchasing ChurchWatch. We trust you will be impressed with the rich feature set and flexibility of ChurchWatch as well as its ease of use. Before using ChurchWatch you should fully read this User's Guide to become familiar with the functions and features now available to your church office. ChurchWatch is written in Microsoft Visual Foxpro (tm) and uses industry standard xbase database file formats. Xbase files are compatible with many other third party programs such as Seagate's Crystal Reports (tm). This User's Guide assumes that you have basic familiarity with the Microsoft Windows (tm) operating system.

Features

ChurchWatch is organized as a set of "Managers" which make up a comprehensive software suite. Each Manager can access the ChurchWatch tables independently and several or all Managers can be open simultaneously. The ChurchWatch Managers are:

Manager	Description	Chapter
Import Manager	Import your existing church data into ChurchWatch	5
Export Manager	Easily export data from ChurchWatch to several formats	5
Household Manager	Family groupings, addresses and contact information	8
People Manager	Details about your people, groups, visitation etc	9
Giving Manager	Keep track of contributions/offerings	10
Tax Receipt Manager	Part of the Giving Manager used at tax time	10
Pledge Manager	Keep track of pledges towards giving accounts	11
Event Manager	Church events, calendars and meetings	12
Class Manager	Keep track of classes, teachers, enrollment	13
Attendance Manager	Tracks attendance, detailed or summary for events and Sunday School	14
Mail Manager	Create mailing labels, mail merges, form letters, name tags etc	15
Message Manager	Send inter-office messages using ChurchWatch	16
Sermon Manager	Keep track of sermons.	17
Library Manager	Keep track of church library materials.	18
Report Manager	Hundreds of pre-defined reports	19
Query Manager	Ad-hoc SQL queries into any ChurchWatch table	20
Bible Manager	Several public-domain Bible translations	21
Hymn Manager	Lyrics to nearly 700 hymns	22
Backup/Restore Mgrs.	Backup and restore your data to protect your investment	23/24

Requirements

Minimum requirements (*) for running ChurchWatch are:

- Pentium class computer
- 32 Megabytes of RAM
- 20 Megabytes of hard disk space
- Microsoft Windows 32 bit operating system
- 800x600 video display

(*) results and performance may vary on your computer hardware.

White Mountain Software Recommends:

- Pentium Class computer
- 128 Megabytes of RAM
- 100 Megabytes of hard disk space
- Microsoft Windows 32 bit operating system
- 800x600 video display
- Sound card and speakers
- Analog Modem for phone dialing
- Backup drive

Single User Installation

To install ChurchWatch simply insert the program CD into your CD-ROM drive and close the door. After a few seconds an installation screen will appear. If the installation screen does not appear you can run the setup program manually as follows:

1. Click the Windows **Start** button
2. Choose **Run**
3. Type d:\setup.exe (you may need to replace the “d:” with the drive letter of your CD-ROM drive)
4. Click the **OK** button

Follow the instructions to install ChurchWatch. We recommend installing to the directory *C:\Program Files\White Mountain Software\ChurchWatch* but you may choose any directory on any drive.

Network Installation

Network installation requires the purchase of additional licenses and a separate special workstation installation CD for each workstation on the network. The single user copy of ChurchWatch is installed on the network file server and the workstation installation copies are installed at each workstation. ChurchWatch can operate on any network that supports peer-to-peer file sharing under Microsoft Windows. If you can see the server’s drives under “Network Neighborhood” or “My Network Places” in the Windows Explorer you can likely run ChurchWatch on your network.

To install the server copy:

1. At your network file server (or any computer that you designate as the ChurchWatch file server), follow the installation instructions described in “Single User Installation” to install the software on the server
2. Mark the directory you just created as shared and add all network users who will be using ChurchWatch. This is done as follows:
3. Right-Click the Windows **Start** button
4. Choose **Explore**
5. In the Explorer window find the directory you just created and right click on it
6. Choose **Sharing**
7. Indicate that the directory is shared and give it a name such as **ChurchWatch**
8. Add any network users and give them full access permissions to the directory

To install a workstation copy:

1. Place the Workstation Install CD into the workstation’s CD-ROM drive or into any accessible CD-ROM drive on your network. After a few seconds an installation screen will appear. If the installation screen does not appear you can run the setup program manually as follows

    Click the Windows **Start** button, Choose **Run**, type d:\setup.exe (you may need to replace the “d:” with the drive letter of your CD-ROM drive) and click the **OK** button
2. Follow the instructions to install on the local workstation
3. You now need to connect this workstation to the file server and this is done as follows:
4. Select **START-SETTINGS-TASK BAR** on your Windows Task Bar.
5. Click the **Start Menu Programs** tab.
6. Click the **ADVANCED** button.
7. Find the ChurchWatch icon (usually under Programs\ChurchWatch)and <u>right</u> click on it. Choose **PROPERTIES**.
8. Click the **Shortcut** tab. Finally change the “**Start-In**” folder to the server folder where the server copy of ChurchWatch is installed.

Updating the Desktop ShortCut:

The ChurchWatch install creates a desktop shortcut for you but you will need to connect the Workstation to your server as follows:

1. Right click on the ChurchWatch desktop icon. Choose **PROPERTIES**.
2. Click the **Shortcut** tab. Change the “**Start-In**” folder to the server folder where the server copy of ChurchWatch is installed.

Important:	*ChurchWatch creates temporary files in C:\CWATCH regardless of where you install the program. You may need to set sharing permissions to allow all ChurchWatch users read/write access to this directory.*

Importing Data From ChurchWatch Version 1

You can easily import your existing ChurchWatch version 1 data tables using a special import program called FIX_TBLS.EXE. This program is found in the main ChurchWatch folder (usually C:\Program Files\White Mountain Software\ChurchWatch). Make sure ChurchWatch is not running, then find the program FIX_TBLS.EXE and double click the icon to run the program. Follow the instructions and answer the prompts to import your existing data.

Using ChurchWatch in Multi-User Environments (Network)

ChurchWatch uses Optimistic Record Buffering which is the preferred method in database systems. This simply means that two or more user's on the network will be able to view and edit the same record at the same time. The first user to save the record by moving to a new record or by closing the form will be the "winner". Any other user attempting to change the same record will receive a warning as shown in figure 1-1. ChurchWatch gives you the option of overwriting the first user's changes or abandoning your changes. Except in exceptional circumstances, you should always abandon your changes and then re-edit the record.

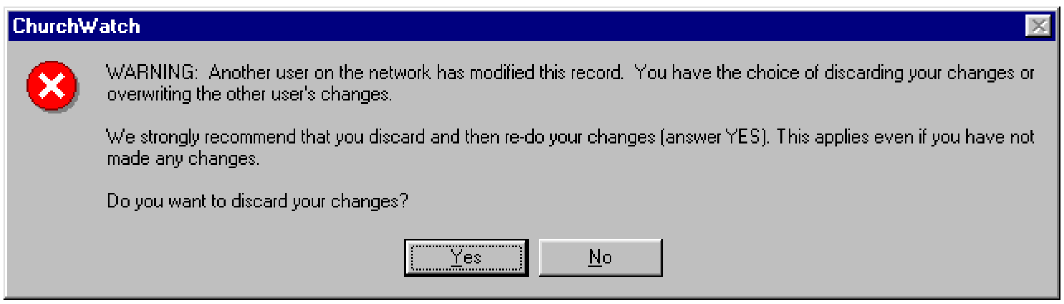


Figure 1-1 Record Update Conflict Warning

In very rare cases it is possible to receive this warning even when you have not yet made a change to the record because ChurchWatch sometimes modifies records or moves the record pointer without the user being aware of this fact.

Uninstalling ChurchWatch

To uninstall ChurchWatch follow this procedure:

1. Click on **START-SETTINGS-CONTROL PANEL**.
2. Double click the **Add/Remove Programs** icon.
3. Select ChurchWatch in the list and then click the **Add/Remove** button.

Re-Installing ChurchWatch

CAUTION!	Re-installing ChurchWatch will install empty database tables. You will need to make a backup before uninstalling or re-installing ChurchWatch!

Setting Screen Resolution

If your display resolution is set to 640x480 you may notice that many of the ChurchWatch forms do not fit properly on the screen. During the design of ChurchWatch we have made a conscious decision to support screen resolutions of 800x600 or higher only. This allows ChurchWatch to take advantage of the extra screen space to fit more information onto each form. Set your screen resolution to a resolution of at least 800x600 with a color depth of at least 256 colors. Note that ChurchWatch looks much better and runs slightly faster if you set your color depth to Hi-Color (16 bit). To set your screen properties:

1. Right click your mouse anywhere on the Windows desktop
2. Choose **Properties**
3. Choose the **Settings** tab
4. Set the **Desktop Area** to at least 800x600
5. Set the **Color Palette** to at least 256 colors, 16-bit color is highly recommended.
6. Click OK

If you cannot achieve these settings it probably means your video card does not have enough memory. It is better to have a larger Desktop Area with less colors.

Starting ChurchWatch

Simply double-click on the ChurchWatch desktop icon or choose ChurchWatch from Windows' **Start-Programs-ChurchWatch** to start ChurchWatch. A title window will appear giving the name of the program and the software version you are running. Note that you can click on the title window or press any key to remove it from the screen more quickly.

"Readme" File

Be sure to check the contents of the README.TXT file on your CD for any information that was not available at the time this manual was written.

Year 2000 (Y2K) Information

The ChurchWatch software package is Year 2000 (Y2K) compliant but your computer hardware may not be. In this case White Mountain Software gives no guarantee concerning Year 2000 compliance. Older PCs may need a BIOS upgrade to become Y2K compliant. ChurchWatch always uses four digit years.

Please note that Windows 95 is NOT year 2000 compliant. You will need to download and install an upgrade file from Microsoft's web site at http://www.microsoft.com.

One other thing you might want to do is set Windows to display four digit years. To do this, double-click the 'Regional Settings' icon in your Control Panel, then select the 'Date' tab. Look at the 'Short Date Sample' field. You should see something like 'M/d/yy' -- this is the Windows default string. The problem: 'yy' will roll over to '00' (not '2000') when January 1st rolls around. To solve this problem, enter two additional lowercase 'y's to the end of the field in the "Short Date Style" field -- or select a string that has 'yyyy' in it. Click 'Apply' when you're finished.

Handling Multiple Churches

ChurchWatch 2 easily handles multiple databases or multiple churches. More information follows in chapter 2 and chapter 4.

Chapter 2 - Menus, Toolbars and Shortcuts

ChurchWatch provides three different main menus to give different forms of access to the ChurchWatch Managers and other features. This chapter describes the menus and ChurchWatch toolbars in detail.

Top-of-Screen Menu

The main menu found at the top of the screen is the usual Windows pull-down type of menu. There are menu items for File, Edit, Forms, Lists, Window and Help. For more detailed information on the sub menu items in these menus refer to the applicable chapter in this user's guide. A summary follows:

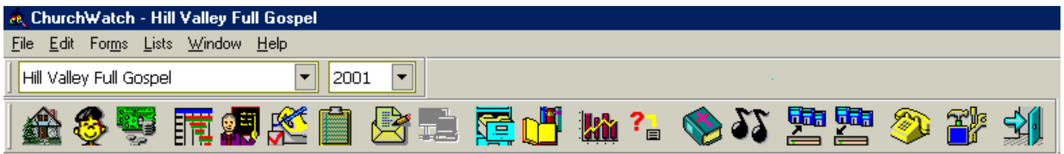


Figure 2-1 Top-of-Screen Main Menu and ChurchWatch Toolbars

Tip:	*The underlined items in the menus (and on buttons) indicate keyboard shortcuts. Press the ALT key at the same time as the indicated letter to activate the menu item or button..*

File Menu

■	Statistics	This item displays statistical information about your database tables including the number of records in each table and the number of deleted records in each table.
■	Who's On	This item is available only if security is enabled and is useful only if you are operating on a network. Who's On lists all users currently logged into ChurchWatch. If the list is in error due to a power outage or software crash, you may have to clear the user flags (found on the SETUP-SECURITY page).
■	Message Manager	This item is available only if security is enabled. Loads and displays the Message Manager for sending inter-office (user to user) messages.
■	Set Password	This item is available only if security is enabled. Allows you to change your ChurchWatch login password.
■	Import Data	Launches the Import Manager to allow you to import data from several formats into ChurchWatch.
■	Export Data	Launches the Export Manager to allow you to export data

from ChurchWatch to one of several different formats. Also includes detailed contribution data export into formats understood by many standard accounting software packages.

- **Backup Manager** — Launches the Backup Manager to perform a backup of all your ChurchWatch data (for the current church only).
- **Restore Manager** — Launches the Restore Manager to restore data that was previously backed up with the Backup Manager (to the current church only).
- **Calendar** — Shows a calendar.
- **New Giving Year** — Archives all giving data and all expired pledge data and clears the giving table.
- **Page Setup** — Gives access to printer properties. Useful mainly when modifying or creating new reports.
- **Exit** — Exits ChurchWatch.

Edit Menu

- **Undo** — Used to recall deleted text or correct a mistake. Useful only in data field entries. Undo does not recall deleted records. You may also use the CTRL and Z keys at the same time as a shortcut.
- **Redo** — Used to undo the undo (replace the previous item). You may also use the CTRL and R keys at the same time as a shortcut.
- **Cut** — Copies the highlighted text to the clipboard and deletes the highlighted text. You may also use the CTRL and X keys at the same time as a shortcut.
- **Copy** — Copies the highlighted text to the clipboard. You may also use the CTRL and C keys at the same time as a shortcut.
- **Paste** — Pastes the Windows clipboard contents into the current data field or edit window. You may also use the CTRL and V keys at the same time as a shortcut.
- **Select All** — Highlights (selects) all text in a data field or in the Bible and Hymn Managers. Note that your cursor must be inside the edit window for this item to be active.
- **Find** — Launches the find text dialog box to allow you to search for some text of interest.

- Preferences — Launches the SETUP form.

Forms Menu

This menu gives quick access to all the ChurchWatch high level forms.

Lists Menu

This menu gives quick access to all the ChurchWatch forms dealing with lists.

Window Menu

This menu gives you quick access to all open forms and windows. In addition it allows you to auto arrange all open windows.

Help Menu

This menu gives you access several important items:

- ChurchWatch Help Topics
  The ChurchWatch online help system. The entire contents of this manual can be found here.

- Update Your Software Online
  With your purchase of ChurchWatch you are entitled to free software upgrades within the current version. If you have an internet connection simply select this item to have your software automatically updated via the internet.

- ChurchWatch On The Web
  A quick link to the ChurchWatch web page. Your internet connection must be "live" first.

- Email to Support — This item launches your mail program to send an email message to ChurchWatch support. Your internet connection must be "live" first.

- Email Tables to Customer Support
  This item compresses your church data tables and emails them to ChurchWatch support. You have the option of adding a comment to explain the problem and we recommend that you do so. Your internet connection must be "live" first.

- About — Information about your software versions.

Main Menu

The main menu is a form that is displayed on the ChurchWatch desktop. If you do not wish to use this form you can set it to auto-minimize in SETUP-USER PREFERENCES.

Figure 2-2 Main Menu Form

Tip:	*You will find that the main menu operates faster if you set your video display to 16 bit color or "Hi Color".*

Enter your church name in the SETUP form to have it displayed at the top of the main menu.

ChurchWatch Shortcut Toolbar

The ChurchWatch Shortcut Toolbar is normally found near the top of the screen and contains buttons that allow access to most of the main forms. The toolbar is moveable and dockable and for each user, ChurchWatch will remember where you last located the toolbar.

ChurchWatch Data Context Toolbar

ChurchWatch easily manages the data from multiple churches and from archived giving years. The ChurchWatch Data Context toolbar is a simple way to select the database or Church data you want to work on. The left list selects the Church name and the right list selects the giving year (current year or archived years). This toolbar is normally found near the top of the screen. The toolbar is moveable and dockable and for each user, ChurchWatch will remember where you last located the toolbar. Caution should be exercised when editing past giving years - don't forget that you have a past year selected. As a warning indication, the right list will turn red when a past giving year is selected.

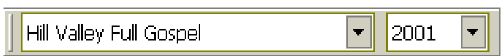


Figure 2-3 Data Context Toolbar

Undocking and Moving the Toolbars

To move/undock either toolbar simply click your mouse on the vertical bar at the far left. While continuing to hold the mouse button down, drag the toolbar to the desired position. If dragged onto the ChurchWatch desktop it will "float" there as a window until you move it. When "floating" the toolbar is always on top and may cover up parts of forms. Note that when the toolbar is located on the ChurchWatch desktop, its shape may change automatically. The toolbars are sizeable so you can resize them as desired when they are "floating".

Docking the Toolbar

To dock (lock in place at the top, bottom, left or right of the screen) the toolbar use the move procedure above and move the toolbar to the top, bottom, left or right of the screen until it locks in place. The toolbar will remain docked until you move it again. When docked, forms will not be allowed to use the space occupied by the toolbar.

Shortcuts

ChurchWatch version 2 includes many new shortcuts to help make you more productive. In fact, we've called version 2 "Productivity Plus".

a) **Sticky Notes** - Sticky notes are simply temporary windows where you can place reminders to yourself. Sticky note windows always remain on top regardless of the state of the main ChurchWatch window. However, when you exit ChurchWatch, all sticky note reminders are lost. Sticky Notes are accessible from the main menu or under FORMS-STICKY NOTES. A quicker way is to press the F3 function key shortcut.

b) **SmartForms** - All forms in ChurchWatch are "smart". For each user, they will remember their size and position as well as other state information such as sort orders and column sizes in grids. Most forms are sizeable. To change the size of a form click on the border of the form and drag it to a new size. You can also maximize and minimize most forms using the sizing buttons on the title bar of the form window (see below).

Figure 2-4 Form Title Bar Buttons

c) **Right Clicks** - Many of the lists and grids in ChurchWatch have mouse right-click shortcut menus. To access the menu, position your mouse over the list or grid and then click the right mouse button. A shortcut menu will "pop up". Select the shortcut menu item of interest. In the case of lists, only list items are "right-clickable" - unused areas of the list are not. If the list is empty, the short cut menu is not accessible except in the case of QuickSearch lists where you can click on the "QuickSearch" title to access the shortcut menu. Refer to the example menu in Figure 2-5.

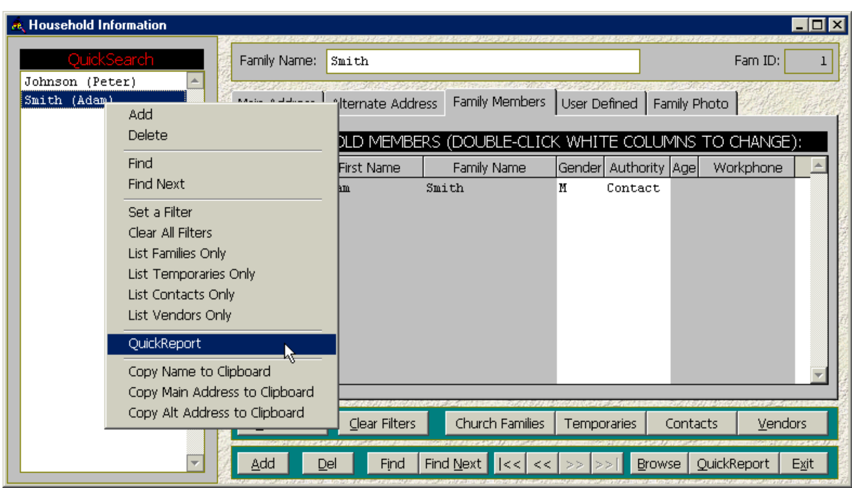
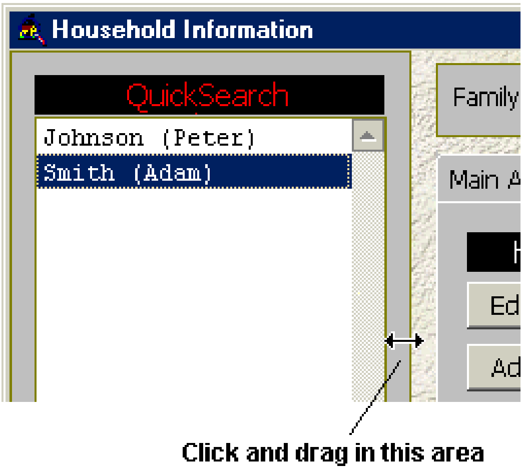


Figure 2-5 Example "Right-Click" Shortcut Menu

d) **QuickSearch Lists** - All main ChurchWatch forms have a QuickSearch list located at the left side of the form. The QuickSearch list is a quick way to locate items of interest. The QuickSearch lists have a keyboard search feature built in. You can quickly search the list by first selecting it (click on an item in the list) and then by typing the first few letters of the item you are looking for. In addition, the Quick Search list is horizontally sizable. Click on the area between the right side of the list and the form and then drag to resize. Refer to the example below:



In many cases you can delete the selected item in the QuickSearch list by pressing the DELETE key on your keyboard.

Figure 2-6 Resizing QuickSearch List

e) **Column Width Sizing** - Many of the ChurchWatch forms have grids or tables in them. Each of the columns within the grid are sizeable. The ChurchWatch SmartForms will remember the size of the columns and restore them automatically next time you open the form. To resize the width of a column, click on the vertical bar between the columns and drag the column to a new size. Refer to the example below.

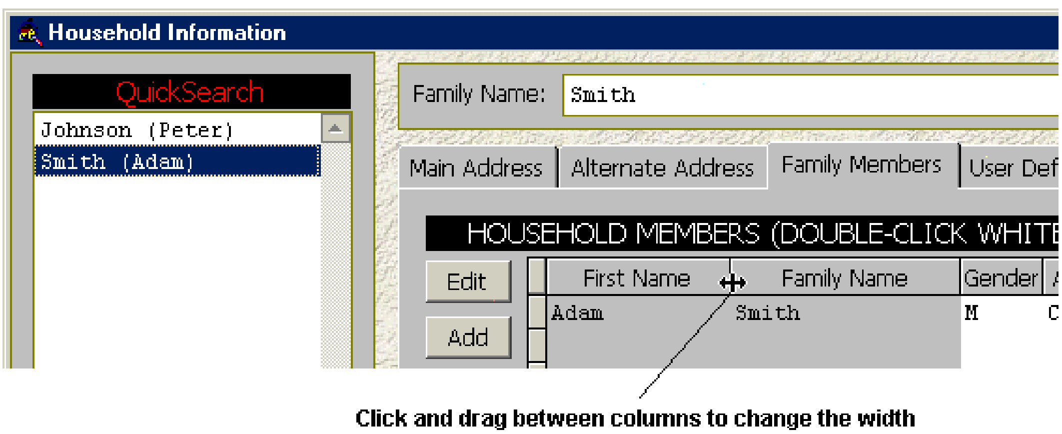


Figure 2-7 Changing Grid Column Widths

f) **Grid Sort Order** - The sort order of most grids can also be changed simply by clicking on a column header to sort by that column. The mouse pointer will change to a down arrow when you are correctly positioned over the header. SmartForms will remember your sort orders. Refer to the example below.

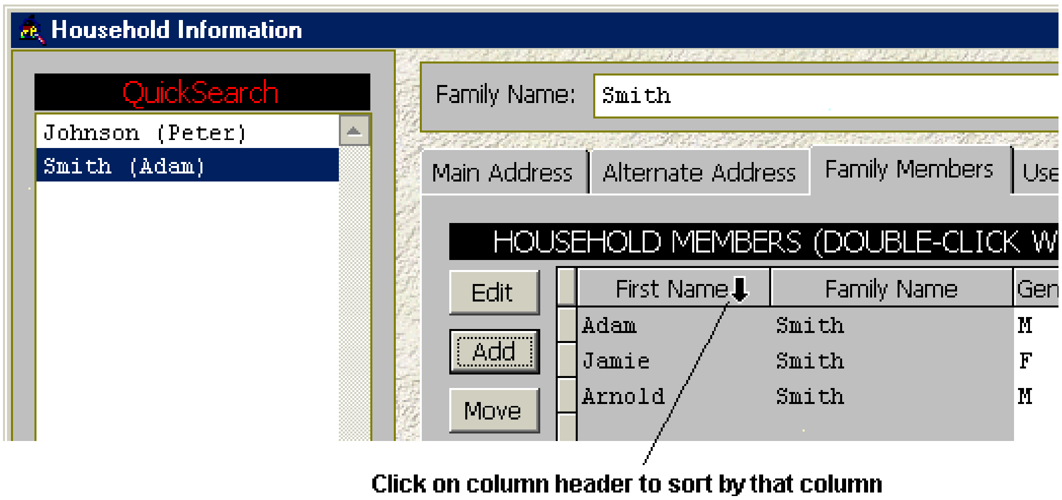


Figure 2-8 Changing the Sort Order

g) **Multiple Selection Lists** - Many of the lists in ChurchWatch are multiple selection capable. To select several items, click once on the first item, then press and hold the SHIFT key while clicking on the last item. To select items one at a time, click once on the first item, then press and hold the CTRL key while clicking on each of the remaining items. An example of a multi-selection is shown below.

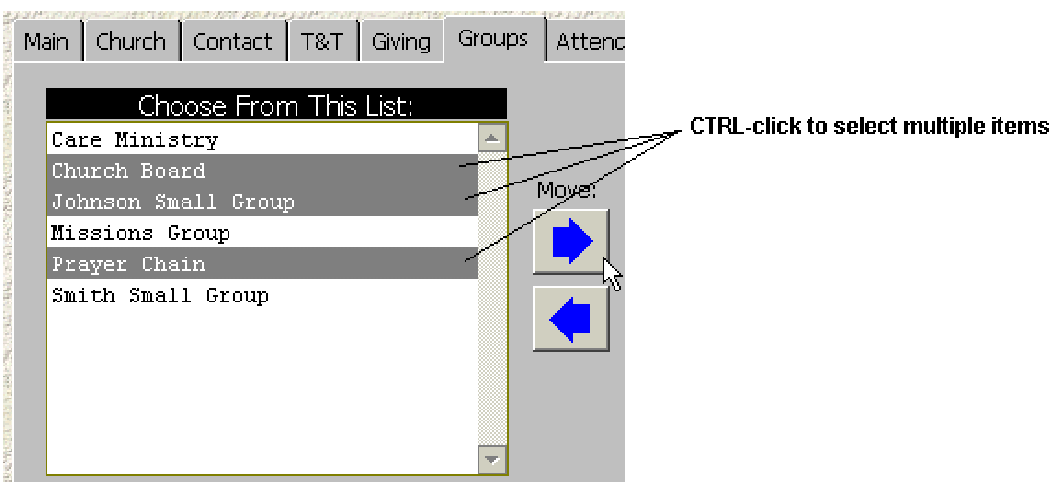


Figure 2-9 Selecting Multiple List Items

h) **Menu Shortcuts** - Most ChurchWatch main menu items have keyboard shortcuts. The keys are listed in the top of form menu at the right side of each item.

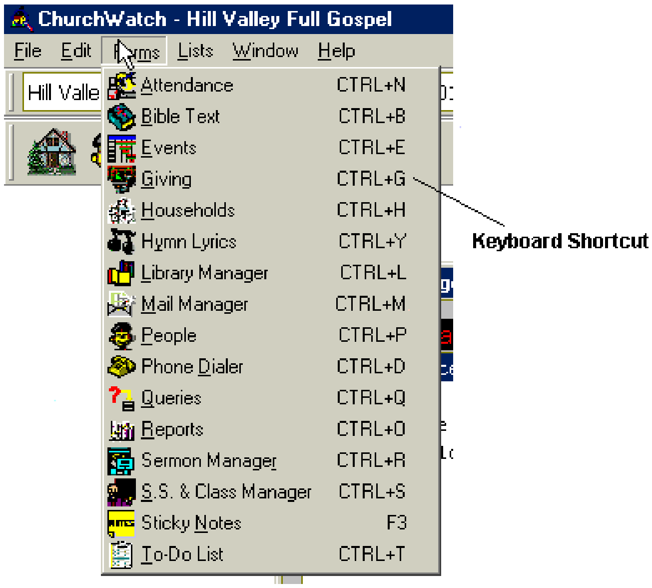


Figure 2-10 Keyboard Shortcuts

i) **Working Without a Mouse** - You can work with ChurchWatch even if your mouse is not functioning. Use the TAB key to move between items and use the ENTER key to activate items.

j) **Browse Windows** - All the main ChurchWatch forms have a “Browse” button to view the data in rough spreadsheet style format. You can change the current record being viewed by simply clicking on a record of interest and then by closing the browse window. Columns in the browse window are temporarily sizeable using the same method as described in item E) above. In addition, you can change the order of columns temporarily by clicking on a column header and then by dragging the column to the left or right.

k) **Moving Between Form Items** - The TAB key is used to move between fields and items on forms.

Chapter 3 - "ChurchWatch Today"

"ChurchWatch Today" is a summary page that is displayed on startup and when selected from the LISTS menu.

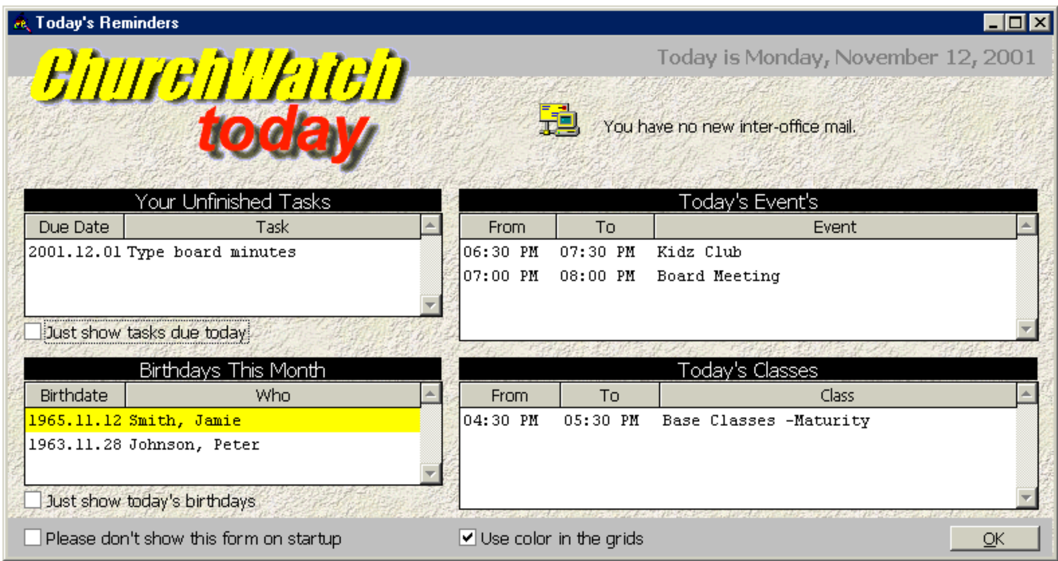


Figure 3-1 "ChurchWatch Today" Form

This page is handy to determine the current day and date, whether or not you have any inter-office messages waiting, your personal list of to-do items and today's church events and birthdays. The ChurchWatch Today page is user-specific. That is, the inter-office mail reminder and the to-do items reflect those of the user who is currently logged into ChurchWatch. You cannot see the to-do items or mail messages for other ChurchWatch users since these are treated as private.

You can modify what's viewed on this form by checking or unchecking the check boxes on this form.

Note:	*If security is turned off on the SETUP-SECURITY page, the ChurchWatch Today page will treat all entered to-do items as public and not assigned to any specific user. In this case, anyone using ChurchWatch will see the same list.*

Tip:	*If you don't want the ChurchWatch Today page to be displayed on startup you can turn off this feature in the SETUP form on the USER PREFERENCES page.*

Chapter 4 - Setup and Maintenance

Before using ChurchWatch for the first time you will need to enter your church's name and address and review some of the ChurchWatch setups. For convenience all ChurchWatch setups are done on one form. You can access the SETUP form from the main menu, from the top-of-screen menu under EDIT-PREFERENCES or from the Shortcut Toolbar.

The SETUP form also allows you to setup other preferences. Some of these are user-specific ("One User") while others will apply to all users ("All Users") of ChurchWatch. The SETUP form is organized into a series of pages. The following tables explain each of these pages.

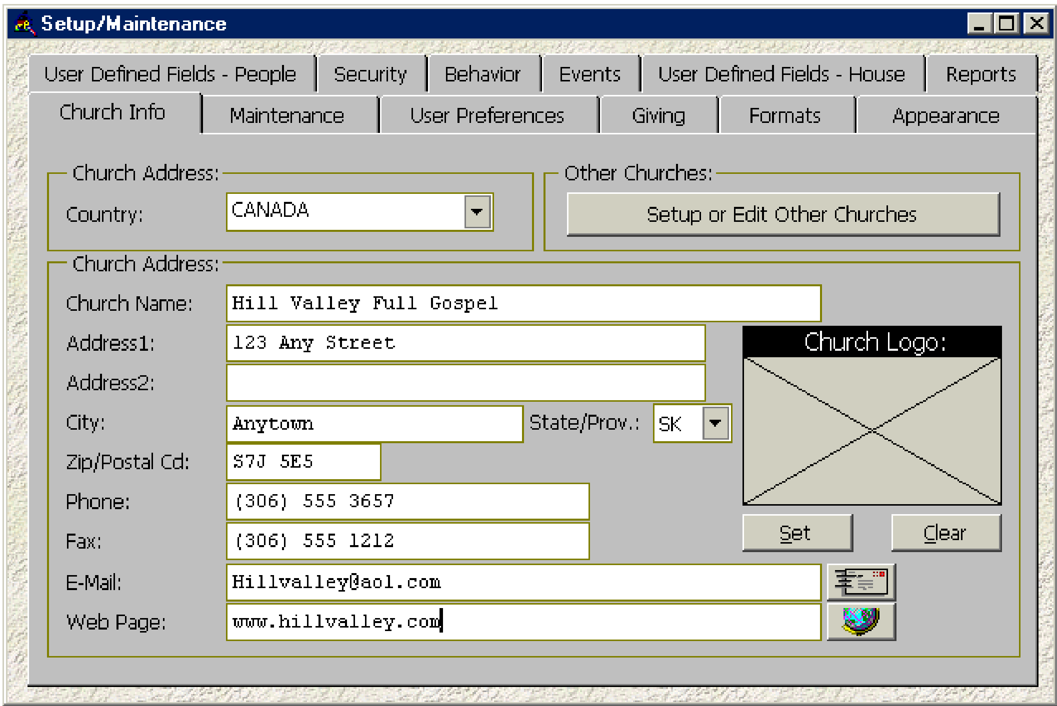


Figure 4-1 Setup and Maintenance Form

SETUP PAGE 1 - Church Info

Item	Description	Applies To
Country	The country your church resides in. You can choose from the countries in the list or enter a new country name if yours is not listed. The selection of this field affects the State/Prov field so enter this first.	All Users
Setup or Edit Other Churches	Click this button to create another database. You can use this feature to handle data from multiple churches or just to create separate databases within your church (for Sunday School for example).	All Users
Church Name	The name of your church. Your church name will be printed on reports.	All Users
Address1 Address2	The address of your church.	All Users
City	City or town that your church is located in.	All Users
State/Prov	US State or Canadian Province. If this does not apply in your country you may simply enter text in this box as required.	All Users
Zip/Postal Cd	Zip code or postal code of your church.	All Users
Phone	Church's phone number.	All Users
Fax	Church's fax number.	All Users
E-Mail	Your church's email address.	All Users
Web Page	Your church's web page URL.	All Users
Church Logo	If you have a church logo you can set it here (for use on reports). Use the SET button to indicate the file name of your logo file or use the CLEAR button to clear the logo from ChurchWatch. Your logo file must be in .BMP, .GIF or .JPG format. ***Tip:*** *White Mountain Software would be pleased to assist you in converting your church logo from paper to digital format.*	All Users

Table 4-1 Church Info Page

SETUP PAGE 2 - Maintenance

Before selecting any maintenance functions you should perform a backup to protect your data. In addition, you should make sure that no one else is using ChurchWatch (click FILE-WHOS ON) since all database tables must be closed during maintenance. ChurchWatch will warn you if other users are online.

Note: *If you have security turned on only the "admin" account is permitted access to the Maintenance page.*

Item	Description	Applies To
Perform a Backup	Launches the Backup Manager so you can do a backup before performing any maintenance functions. Always do a backup before selecting a maintenance function.	All Users
Re-Index Databases	**Occasionally (recommend once per week minimum) you should re-index your database tables to optimize the performance of ChurchWatch. This function can also fix certain errors. If you notice odd behavior, missing data etc, a database re-index can often solve the problem. Before calling for support try clicking this button.**	**All Users**
Pack Databases	When you delete a record on any of the ChurchWatch forms the record is not physically deleted, only marked for deletion. This is done so that you can undelete the record if desired. Choose Pack Databases to physically delete records and free up disk space.	All Users
Fix Corrupted Memo Files	Very rarely, usually after a power disruption, you may receive a "corrupted memo file error" while using ChurchWatch. To correct the problem, click this button.	All Users
Reset SmartForms Data	Use this button to reset all SmartForms data. All sizes, positions and states of forms will be forgotten so that all forms revert back to original defaults. This is especially useful if a form is off-screen due to a change in screen resolution.	All Users
Repair House and People QuickSearch Lists	The QuickSearch lists in the Household and People Managers are derived fields. You can regenerate and repair them at any time if necessary by clicking this button. Normally this is not necessary.	All Users
Zap All Tables	**CAUTION**. This button deletes all data in all database tables. Note that the data cannot be recovered once zapped unless you have a good backup.	All Users
Default Backup Path	Use this field to set a default backup directory. The Backup Manager will always load this as the default disk drive and directory. Use the Browse button beside the field to choose a disk drive and directory.	All Users

Table 4-2 Maintenance Page

SETUP PAGE 3 - User Preferences

This page allows each user to customize ChurchWatch to their personal preferences.

Item	Description	Applies To
Desktop Window Size on Startup	You have three choices for the startup size of the ChurchWatch desktop: **Normal:** Window is sized normal **Minimize:** Window is minimized onto the Windows Task Bar **Maximize:** Window is maximized to use full screen ***Tip:*** *Put ChurchWatch in your START-PROGRAMS-STARTUP folder and set the window size to minimized to have ChurchWatch auto-start and sit on the Windows Task Bar whenever you turn on your computer.*	One User
Change Your Password	Use this button to change your login password. This button only appears if security is turned on.	One User
Show Family Photos on Household Form	If you are not using family photos you can uncheck this box.	One User
Show Person Photos on People Form	If you are not using person photos you can uncheck this box.	One User
Sound Effects	Check this box to turn on sound effects.	One User
Button Help Text	When this box is checked, ChurchWatch shows help text whenever you hover your mouse over a button.	One User
Notify on New Messages	When this box is checked, ChurchWatch will notify you when you receive a new inter-office message. Applicable only when security is turned on.	One User
Display Backup Reminder on Shutdown	When this box is checked, ChurchWatch will remind you to do a backup whenever you exit the program.	One User
Prompt on Deletes	When this box is checked, ChurchWatch will always ask if its ok to delete a record. We recommend leaving this checked.	One User
Show “ChurchWatch Today” on Startup	When this box is checked, the ChurchWatch Today page is always loaded when the program starts.	One User
Minimize Main Menu Form on Startup	If you don’t use the main menu window, check this box to have it automatically minimized on startup.	One User
Favorite Word Processor	Enter the path to your word processor’s .EXE file. This item is used by the Sermon Manager when editing a sermon file.	One User

Table 4-3 User Preferences Page

SETUP PAGE 4 - Giving

This page is used to setup preferences related to the Giving, Pledge and Tax Receipt Managers.

Note: *If security is turned on, only users with access to the Giving Manager will be able to view this setup page.*

Item	Description	Applies To
Charity Registration #	Certain countries, particularly Canada, require that churches and charities be registered for tax purposes. Enter your church's charity registration number here. This number is printed on income tax receipts and on Substantiation of Contributions reports (USA).	All Users
Last Receipt # Assigned	Each tax receipt printed by ChurchWatch has a serial number for auditing purposes. This setup field is the last tax receipt number printed. It cannot be altered although you can reset the number to zero by clicking the RESET TO ZERO button. We recommend you do not reset the last receipt number but if necessary it should not be done more than once per tax year or duplicate serial numbers will result.	All Users
Default Giving Account	Most churches have a giving account that is used more commonly than others. For example "Budget". First setup your giving account names (refer to chapter 6) and then set the default giving account here. When adding offering data the Giving Manager will always pick this account by default in an attempt to minimize your data entry effort.	All Users
Auto Load Person's Last Contribution	Check this box to have the Giving Manager seek and automatically set the account and amount boxes based on a person's last giving when doing postings. This is very useful since many people follow a tithing pattern that repeats week to week. Use this feature to reduce data entry.	All Users
Enable Pledge Manager	When this box is checked, ChurchWatch will always prompt whether you want to work with offerings or pledges when the Giving Manager is selected. If your church does not use pledges uncheck this box.	All Users
Fiscal Year End	Enter the last date of your churches fiscal year here. This value is used in the fiscal year reports.	All Users

Item	Description	Applies To
Tax Receipt Digitized Signature	Tax receipts (Canada) and the Substantiation of Contributions report (USA) both permit a digitized signature to simplify the tax reporting process. Three buttons are provided here: **SET SIGNATURE FILE**: Click this to select a .BMP file that contains your digitized signature. **CLEAR:** Click this to clear the signature file. **TEST:** Click this to see what the signature would look like on a tax receipt. ***Tip:*** *When creating your signature file use a dark, thick felt pen and then scan at high quality. White Mountain Software would be pleased to assist you in scanning your signature.*	All Users

Table 4-4 Giving Page

SETUP PAGE 5 - Formats

This page allows you to setup ChurchWatch's auto formatting features.

Item	Description	Applies To
Date Format	Select the date format you would prefer to use. Examples are given with each.	All Users
Default Postal Code/Zip	This item is useful for reducing the amount of data entry you need to do when entering addresses. You can enter the first few characters of the zip code or postal code for your area. ChurchWatch will automatically enter these prefix characters whenever you create a new church family in the HOUSEHOLD MANAGER.	All Users
Currency Symbol	ChurchWatch uses a default currency symbol of "$" which may not be correct for your country. You can set a single character currency symbol in this field.	All Users
Auto Formatting	This box contains several options for auto formatting names and list items. To keep your data tidy we highly recommend selecting an auto format style for each of the items listed. You have three choices: **No Auto Formatting:** Entered items are left as-is (e.g. "smith") **Initial Caps:** Entered items are auto converted to initial capital letters (e.g. "Smith") **All Caps:** Entered items are auto converted to all capitals (e.g. "SMITH") Note that there are FORMAT ALL NOW buttons for each. Click this button to cause ChurchWatch to reformat all stored data immediately. ***Tip:*** *If you have a name or list item that ChurchWatch has trouble auto-formatting you can set this option to No Auto Formatting, enter the name or list item and then reset this setup item to the desired format. Your entered name or list item will remain as-entered as long as you do not re-select the entry field.*	All Users

Table 4-5 Formats Page

SETUP PAGE 6 - Appearance

This page allows you to setup the overall look and feel of the ChurchWatch program itself.

Item	Description	Applies To
Item List	Begin by selecting an item in the list on the left.	One User
Detail Window	Change settings using the prompts in the panel at the right.	One User
Themes	"Themes" are pre-defined sets of ChurchWatch appearance settings. ChurchWatch provides several themes that you can select from using the pull down list box in this window. In addition you can create and maintain you own themes using the buttons SAVE AS, SAVE and DELETE: **SAVE AS** Use the SAVE AS button to save your current settings under a new theme name. **SAVE** Use the SAVE button to save your current settings under the current theme name. This modifies the current theme. **DELETE** Use the DELETE button to delete a user defined theme. You cannot delete the default ChurchWatch theme.	One User

Table 4-6 Appearance Page

SETUP PAGE 7 - User Defined Fields, People Manager

This page allows you to set the titles used for user defined fields in the People Manager. These field names will be used in the People Manager, in data filters and in ChurchWatch reports.

Item	Description	Applies To
Character Fields	Six user defined character (text) fields are supported. Enter the titles here.	All Users
Numeric Fields	Three numeric fields are supported. Enter the titles here.	All Users
Checkbox Fields	Three logical (true/false) checkbox fields are supported. Enter the titles here.	All Users
Phone	Two additional phone numbers are supported. Enter the titles here.	All Users

Table 4-7 User Defined Fields, People Manager Page

SETUP PAGE 8 - Security

Security is discussed in more detail in Chapter 7. Here is a summary of the security page on the SETUP form:

Item	Description	Applies To
User List	This list shows all currently defined user names.	N/A
Add	Click ADD to add a new user name.	N/A
Edit	Click EDIT to edit the name, password and/or access privileges for a user.	N/A
Delete	Click DELETE to delete a user name.	N/A
Disable All Security	When this box is checked, security is turned off but this is definitely not recommended. When security is turned off you will not be required to login when ChurchWatch starts. In addition, certain features of ChurchWatch such as the Message Manager will not be accessible. ***Note:*** *White Mountain Software* ***strongly*** *recommends that you leave security turned on. Your government's laws may in fact require that church records are protected.*	N/A
Clear Online Flags	If the list of user's online in FILE-WHOS ON shows more users than you know are logged on click this button to clear ChurchWatch's records of who is online. This will be required in the event of a power outage or PC crash while ChurchWatch is in use.	N/A

Table 4-8 Security Page

SETUP PAGE 9 - Behavior

You can change the behavior of ChurchWatch using the items on this page

Item	Description	Applies To
Auto-Set City When Adding New Families	Check this box to have the Household Manager automatically set the city for you when new families are added. The church's city is used.	All Users
Auto-Set State/Province When Adding New Families	Check this box to have the Household Manager automatically set the state or province for you when new families are added. The church's state or province is used.	All Users
Print Child's Last Name in Directories if Different From Contact's Last Name	Check this box to modify directory reports as described.	All Users
Put Household Members List on Main Page...	ChurchWatch is designed to run in a minimum screen resolution of 800x600. At this resolution the family members list does not fit on the main page of the Household Manager. When this box is checked and the Household Manager is resized large enough vertically, the family member list is automatically placed on the main page. Uncheck this box to stop this behaviour.	All Users
When Entering Report Manager Auto Select Favorites	Check this box to have each user's favorite reports list shown when the Report Manager is started. When unchecked, the Report Manager starts with the attendance reports list showing.	All Users

Table 4-9 Behavior Page

SETUP PAGE 10 - Events

ChurchWatch permits recurring events to be defined. You can adjust some of the parameters of this feature to optimize the performance of ChurchWatch.

Item	Description	Applies To
Recurring Events/Classes	When you define a recurring event or class, ChurchWatch looks ahead a specific number of days to auto-define future events. You can set the number of days that ChurchWatch looks ahead here. The lower this number the faster ChurchWatch will perform the look ahead and other event based operations. You can also cause an immediate look ahead (if you change the number) by clicking the LOOK AHEAD NOW button.	All Users
Data Integrity	When this box is checked, ChurchWatch will check your Facility, Resource and People schedules for schedule conflicts whenever an event or class is created or changed. Note that on slower computers this may be a slow operation. Uncheck this box to turn off the schedule check and speed up the operation of ChurchWatch when creating or changing events. The CHECK NOW button can be used to force a manual check at any time regardless of whether the checkbox is checked or not.	All Users
Attendance Data	By default ChurchWatch never deletes attendance data. You must manually purge the attendance data to free up disk space. Enter a date and click the PURGE button. Finally, go to the SETUP-MAINTENANCE page and click the PACK button.	All Users

Table 4-10 Events Page

SETUP PAGE 11 - User Defined Fields, Household Manager

This page allows you to set the titles used for user defined fields in the Household Manager. These field names will be used in the Household Manager, in data filters and in ChurchWatch reports.

Item	Description	Applies To
Character Fields	Two user defined character (text) fields are supported. Enter the titles here.	All Users
Numeric Fields	Two numeric fields are supported. Enter the titles here.	All Users
Checkbox Fields	Two logical (true/false) checkbox fields are supported. Enter the titles here.	All Users

Table 4-11 User Defined Fields, Household Manager Page

SETUP PAGE 12 - Reports

This page allows you to modify ChurchWatch report files that don't appear in the Report Manager.

Item	Description	Applies To
Report List	Select the report you want to modify or restore from this list.	All Users
Modify Layout	Click this button to modify the layout of the selected report.	All Users
Restore Original	Whenever you modify the layout of a report, a backup copy of the original is automatically saved for you in the folder "Original Report Backups". If you create errors during the modification of the report you can always restore the original backup by clicking this button. **Do not delete the Original Reports Backup folder.**	All Users

Table 4-12 Reports Page

Chapter 5 - Import and Export Managers

Data can easily be imported from your existing database system into ChurchWatch. You can also export data stored in ChurchWatch. Many popular file formats are supported. The Export Manager is also used to export giving data into popular accounting packages such as QuickBooks, Quicken and Simply Accounting.

Loading Data Into ChurchWatch - The Import Manager

You must proceed carefully when importing data into ChurchWatch and careful planning is important. ChurchWatch uses Microsoft Visual Foxpro's Import facility and no data validation is done. As such, you can create problems if you attempt to load a field that is of the wrong data type (e.g. a text field loaded into a numeric field for example). White Mountain Software intends to correct this limitation in future versions of ChurchWatch. Even with this limitation, the Import Manager is an extremely powerful tool to easily and quickly load your existing data into ChurchWatch.

Note that data you import is always appended to the existing ChurchWatch tables. That means that you can add data using the Import Manager at any time without disrupting the data you already have stored in ChurchWatch, but you cannot add data to existing records.

Planning and Preparing for the Import

This is a very important step. Carefully plan your import by doing three things:

1. Examine your existing data and the ChurchWatch table structures listed in Appendix A to determine which of your fields can be properly imported into ChurchWatch. Take note of the type of field ChurchWatch can accept (numeric, character, logical etc).

2. Choose the file type you want to import from. ChurchWatch supports:

- Comma delimited text file (.TXT)**(BEST CHOICE)**
- Blank delimited text file (.TXT)
- Semi-Colon delimited text file (.TXT)
- Tab delimited text file (.TXT)
- Foxpro (and Xbase) DBF file (.DBF)
- Microsoft Excel files (V2-V4, V5, V7) (.XLS)
- Lotus Symphony file (.WRK, .WR1)
- Lotus 1-2-3 file (.WKS, .WK1)
- Symbolic link (.SLK)
- System Data Format (SDF)
- Microsoft Multiplan (.MOD)
- Visicalc (.DIF)
- Framework II (.FW2)
- Paradox (.DB)
- Rapidfile (.RPD)

3. Decide on how to uniquely define each family. You can use a numeric family id or a family name but since many families have the same last name and since members of the same family may have different last names, we recommend assigning a temporary family id code to each family. Each person in the family should have the same numeric family ID code. Note that ChurchWatch will replace these temporary family IDs with new ones of its own choosing.

4. Create a file of the chosen file type using your existing Church Management software, database or some other software. Use only the fields you chose in step 1 and take note of the order of the fields in the file. Append your temporary family ID code if necessary during this step.

In our example, we are going to use a comma delimited text file to import two families. Refer to Appendix A and study the fields we have chosen. We have chosen the following fields in the following order:

1. Family name (family_nam of HOUSE table)
2. First name (first_name of PEOPLE table)
3. Authority (record_lev of PEOPLE table, where 1=Contact, 2=Spouse, 3=Child)
4. Address1 (address1 of HOUSE table)
5. City (city of HOUSE table)
6. Phone (housphone1 of HOUSE table)
7. Directory (directory of HOUSE table)

Here is the sample data we are going to use. We want to import two families. The Smith family will be placed into the church directory while the Peters family will not.

```
"Smith","Joe",1,"123 Elm Street","Anytown","555-1212",T
"Smith","Helen",2,"123 Elm Street","Anytown","555-1212",T
"Smith","Johnny",3,"123 Elm Street","Anytown","555-1212",T
"Smith","Cindy",3,"123 Elm Street","Anytown","555-1212",T
"Smith","Amanda",3,"123 Elm Street","Anytown","555-1212",T
"Peters","Eldon",1,"123 Any Street", "Anytown","111-2222",F
"Peters","Shiela",2,"123 Any Street", "Anytown","111-2222",F
"Peters","Tommy",3,"123 Any Street", "Anytown","111-2222",F
```

Tip: *Notice that blanks are not allowed in the input file unless inside quotations. Notice the T and F indicators (with no quotes) at the end of each record. T stands for TRUE and F stands for FALSE and they will be used to set the directory field which is a logical field (has a value of TRUE or FALSE only). For ChurchWatch logical fields you MUST use T or F with no quotes in order for the import to be successful.*

Tip: *Date fields must have 4 digit years and be in exactly the same format as you have chosen for ChurchWatch (SETUP-FORMATS). In addition, if you are using a text file as the input source, the date fields should not be in quotes.*

As already mentioned, using a family ID code is a better method for import so lets add a numeric family ID to the start of each record:

```
1,"Smith","Joe",1,"123 Elm Street","Anytown","555-1212",T
1,"Smith","Helen",2,"123 Elm Street","Anytown","555-1212",T
1,"Smith","Johnny",3,"123 Elm Street","Anytown","555-1212",T
1,"Smith","Cindy",3,"123 Elm Street","Anytown","555-1212",T
1,"Smith","Amanda",3,"123 Elm Street","Anytown","555-1212",T
2,"Peters","Eldon",1,"123 Any Street", "Anytown","111-2222",F
2,"Peters","Shiela",2,"123 Any Street", "Anytown","111-2222",F
2,"Peters","Tommy",3,"123 Any Street", "Anytown","111-2222",F
```

Now that the input file is complete and has been checked we are ready to begin the import.

Step 1 - Choose the Import Type

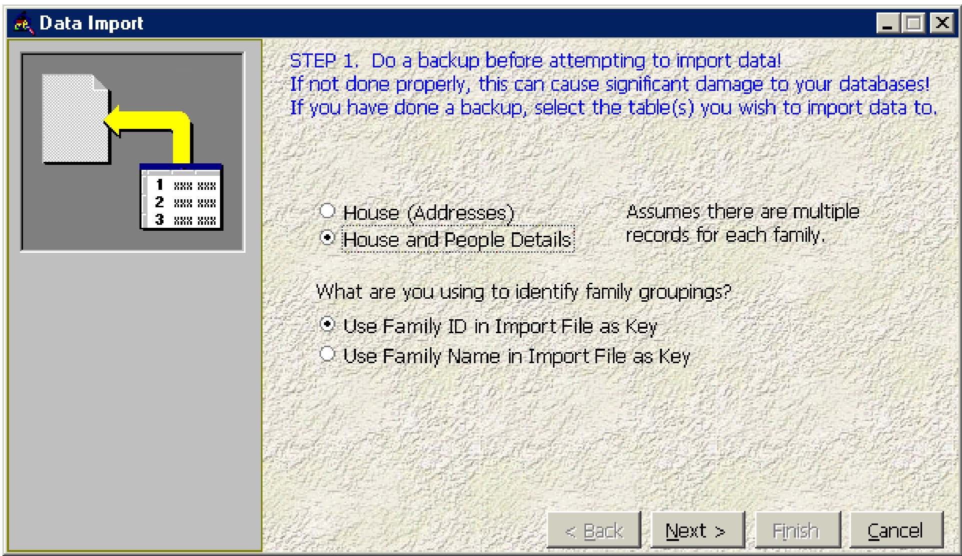


Figure 5-1 Choosing the Import Type

You have two choices for the import type. If you are simply importing family names and addresses choose the "House" option. If you are importing any fields that are contained in the PEOPLE table choose the "House and People Details" option. In this example we are importing fields that are contained in the PEOPLE table so we choose "House and People Details".

Since we are using a Family ID instead of Family Name as the key we need to check the "Use Family ID in Import File as Key" checkbox.

Click the NEXT button to move to the next step.

Step 2 - Choose the Fields

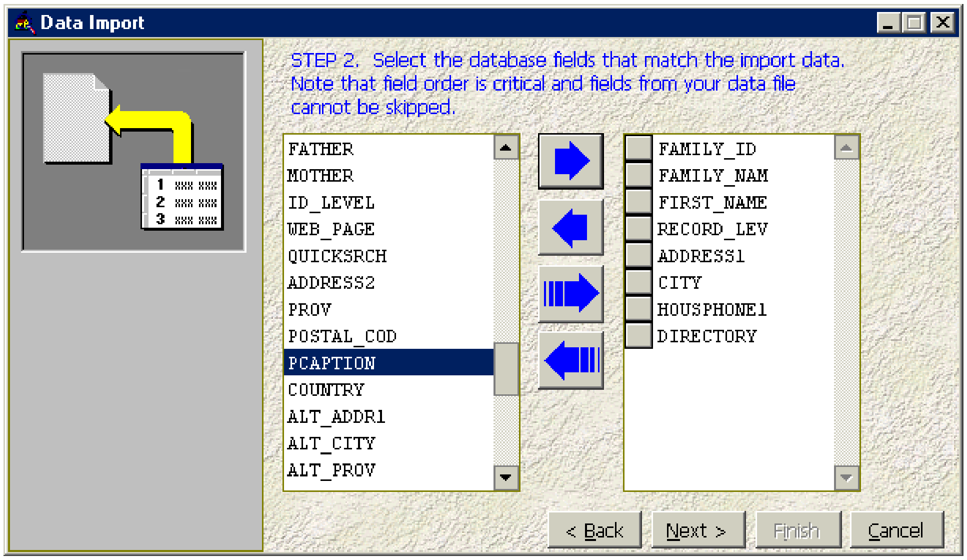


Figure 5-2 Choosing Import Fields

Next, choose the fields you are going to import into ChurchWatch from the list at the left. Move your chosen fields to the list on the right using the arrow buttons. Note that the order is very important and must exactly match the order of the fields in your input data file. If you make a mistake in the ordering, you can click and drag on the square boxes on the left side of the right hand list to reorder the items.

You may not skip fields in the input data file. The above figure shows the fields in our example input file in the correct order with no skipped fields.

If you choose an incorrect field name you can use the left facing arrows to move fields back to the main list but take note that they will be added back at the bottom of the left hand list.

Click the NEXT button to move to the next step.

Step 3 - Select File Type and Name

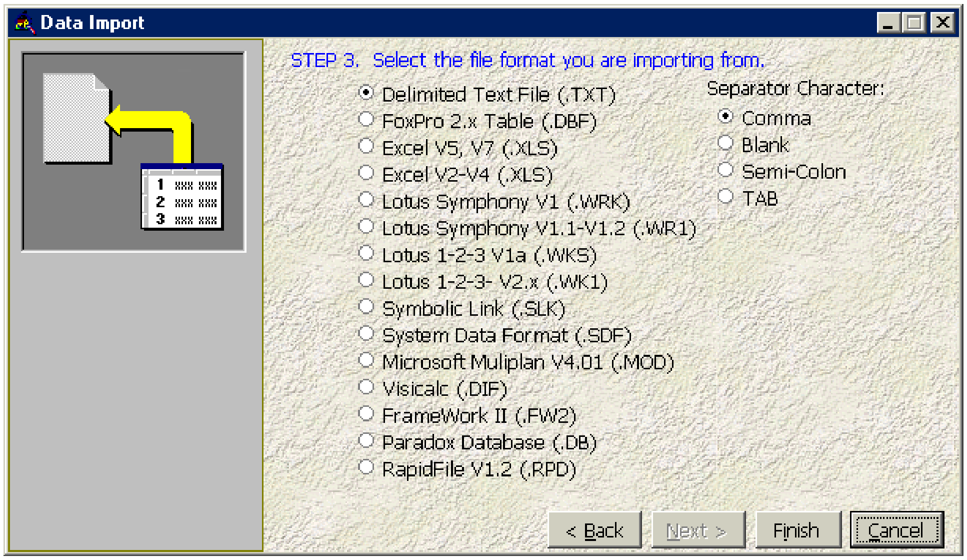


Figure 5-3 Setting File Type and Name

Next, set the file type for your input file. If the input file is a text file, as it is in this example, you must also choose the delimiter type. The “delimiter” is the character used to separate input fields. Choose one of comma, blank, semi-colon or tab. Our example is a comma delimited text file.

Click the FINISH button to move to the next step. The Import Manager will prompt you for the name of the file you are using for an input file. Use the displayed dialog box to select your file.

Step 4 - Review the Results and Commit the Data

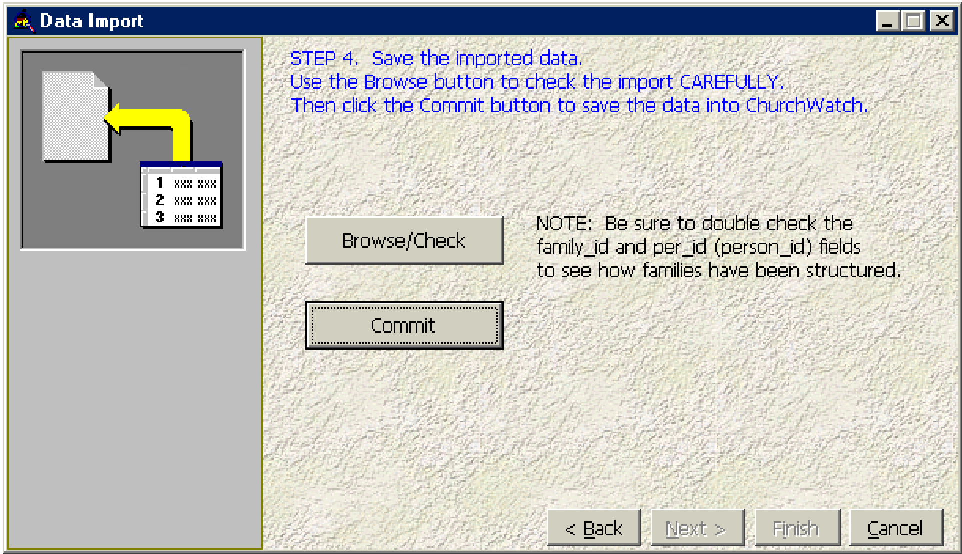
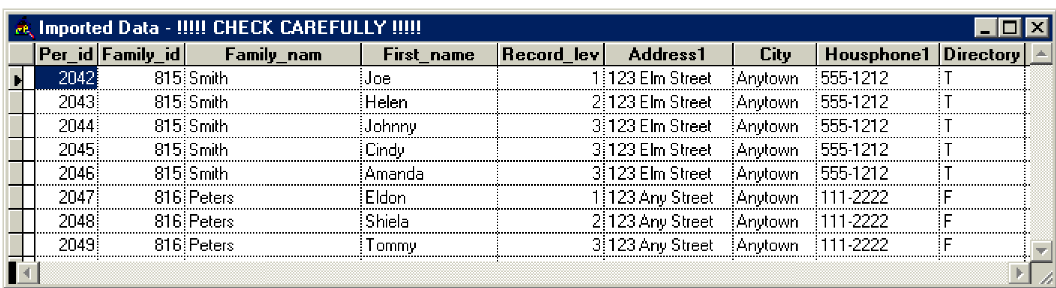


Figure 5-4 Final Steps

The Import will be performed and the page shown above will be displayed. Click the BROWSE/CHECK button to view the results of your import. Be sure to double check the way that the Import Manager has grouped the families in the input file:



Imported Data - !!!!! CHECK CAREFULLY !!!!!

Per_id	Family_id	Family_nam	First_name	Record_lev	Address1	City	Housphone1	Directory
2042	815	Smith	Joe	1	123 Elm Street	Anytown	555-1212	T
2043	815	Smith	Helen	2	123 Elm Street	Anytown	555-1212	T
2044	815	Smith	Johnny	3	123 Elm Street	Anytown	555-1212	T
2045	815	Smith	Cindy	3	123 Elm Street	Anytown	555-1212	T
2046	815	Smith	Amanda	3	123 Elm Street	Anytown	555-1212	T
2047	816	Peters	Eldon	1	123 Any Street	Anytown	111-2222	F
2048	816	Peters	Shiela	2	123 Any Street	Anytown	111-2222	F
2049	816	Peters	Tommy	3	123 Any Street	Anytown	111-2222	F

Figure 5-5 Results of the Import

Study the results in Figure 5-5. Notice that the data has been correctly. Also notice that the family ID fields from our example input file have been changed. ChurchWatch assigns its own family Ids.

Tip:	*Blank records in the import are caused by blank lines in the input file or by a carriage return at the end of the file. You have a choice of correcting the input file and redoing the import or leaving the import results as-is and deleting the blank family in the Household Manager.*

Although the data in the import results shows many repeated fields, such as the address field, ChurchWatch actually stores the data much more efficiently. In our example, only two (2) family records will be created with five (5) People records in the "Smith" family and three (3) People records in the "Peters" family.

Finally close the browse window and click the COMMIT button to commit the imported data into ChurchWatch. Once you have successfully imported data into ChurchWatch you should go to the SETUP-FORMATS page and format all data as desired using the FORMAT ALL NOW buttons.

Summary and Items of Note

Note the following:

- Giving data cannot be imported into ChurchWatch since there is a complex relationship between giving records and household (address) information.
- Use the BACK buttons if you make a mistake during the import process and need to redo a step
- Blanks are not allowed in .TXT input files unless between quotes ("")
- You must use a family id or family name to group families
- Field order is critical
- You cannot skip fields in the input file unless they are at the end of the record
- Never import data to the PDIRECTORY field of the PEOPLE table. Choose the DIRECTORY field in the HOUSE table instead. ChurchWatch will automatically fill in the PDIRECTORY field.
- Importing marital status or title fields will update the appropriate lists in ChurchWatch
- ChurchWatch logical fields must be imported as T or F with no quotes
- Date fields must have 4 digit years and be in exactly the same format as you have chosen for ChurchWatch (SETUP-FORMATS). In addition, if you are using a text file as the input source, the date fields should not be in quotes.
- Blank lines in the input file cause blank records to be imported
- Do not use header records in the input file. Spreadsheet output files should be checked for a header record and if one exists it should be deleted.
- In rare cases bad input data may cause a program crash but will not harm existing data.

Copying Data Out of ChurchWatch - The Export Manager

You can easily export your data into many different file formats using the Export Manager. You can export Household, People or Giving data. The Export Manager can also export your giving data into a QuickBooks, Quicken or Simply Accounting file. This is an excellent way to extract your giving information for use in many different accounting software packages since most will read QuickBooks files.

Step 1 - Choose the Data to Export

To start the Export Manager select FILE-EXPORT from the top-of-screen menu. The following page will be displayed:

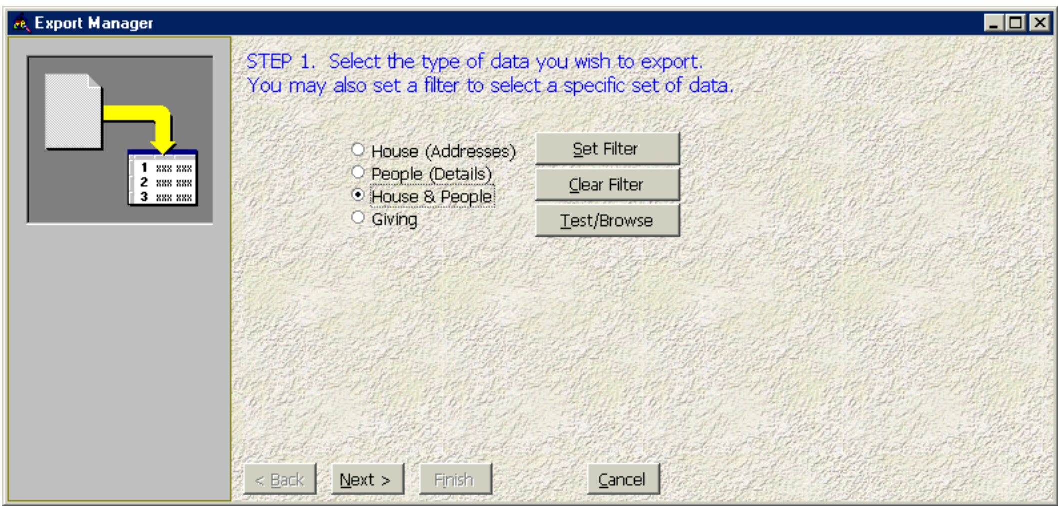


Figure5-6 Choosing the Data to Export

Select the type of data you want to export. You may also set a data filter (refer to Chapter 26) by clicking the SET FILTER button. Use the TEST/BROWSE button to review the data you have selected (note you will have an opportunity to select specific fields in the next step). Once you are satisfied with what you have selected, click the NEXT button. In the example above, we have chosen to export House and People fields.

The Giving export selection is a special case and will be covered later in this chapter.

Step 2 - Choose Specific Fields

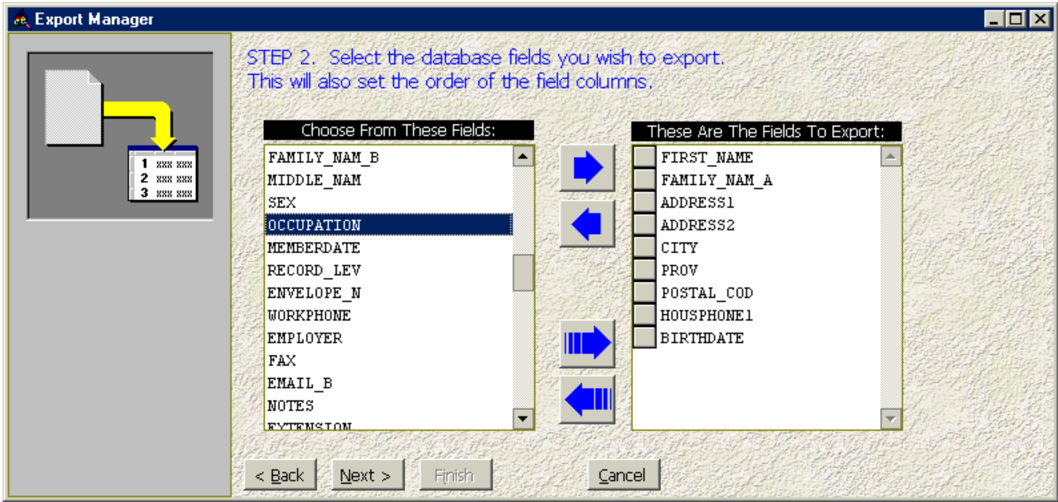


Figure 5-7 Choosing the Fields to Export

In this step you need to choose the specific data fields you are interested in exporting. The fields will be placed in the output field in the exact order that you select them. Use the arrow buttons to move fields from the master list at the left to the selection list at the right. In the example above we have chosen person's first name, the family name from the House table (see note below), the person's address and birthdate. You can reorder your selections by clicking and dragging on the square buttons in the right list box. When you are satisfied with your selections and their order click the NEXT button.

NOTE:	*When "House & People" is selected in step 1, there are several data fields with the same name in the HOUSE and PEOPLE tables. These will show up in the master field list as FAMILY_NAM_A, FAMILY_NAM_B, FAMILY_ID_A, FAMILY_ID_B etc. The "_A" fields are from the HOUSE table and the "_B" fields are from the PEOPLE table. Take care when selecting these fields.*

Step 3 - Choose a File Type

Finally, you must choose the type of file you would like to export the data to. The Export Manager supports many different file types.

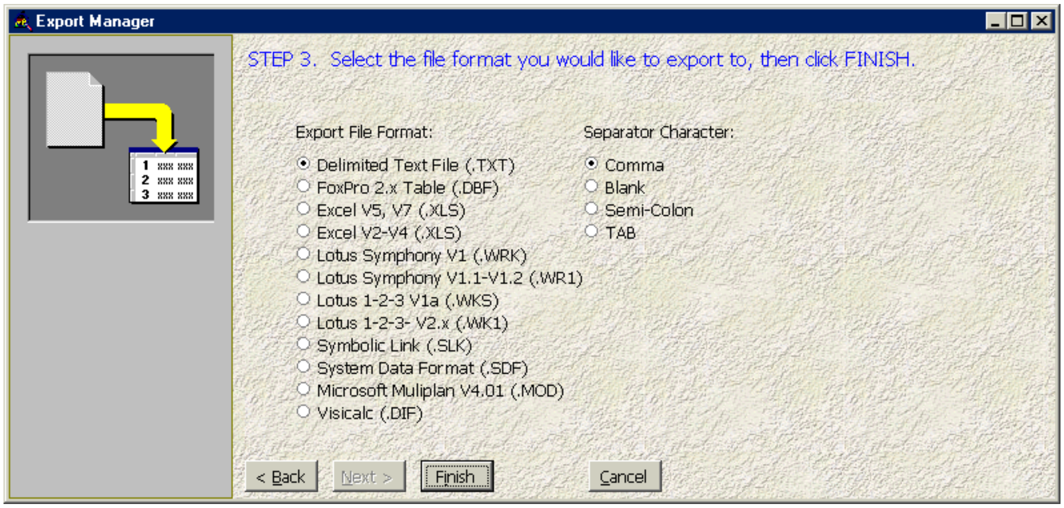


Figure 5-8 Choosing the Export File Type

When choosing a delimited text file you must also choose the separator character which can be one of a comma, a blank, a semi-colon or a tab. Choose the file type and then click the FINISH button. In our example we have chosen a comma delimited text file as the output destination.

Finally, you will be prompted for a file name and drive/folder location. Enter a file name. At this point the export will occur and indicate successful completion.

Here is the comma delimited text file created by our example:

```
"Eldon","Peters","123 Any Street","","Anytown","","","111-2222",1953.03.04
"Shiela","Peters","123 Any Street","","Anytown","","","111-2222",1954.03.08
"Tommy","Peters","123 Any Street","","Anytown","","","111-2222",1996.07.06
"Amanda","Smith","123 Elm Street","","Anytown","","","555-1212",1968.04.07
"Cindy","Smith","123 Elm Street","","Anytown","","","555-1212",1967.01.15
"Helen","Smith","123 Elm Street","","Anytown","","","555-1212",1945.12.18
"Joe","Smith","123 Elm Street","","Anytown","","","555-1212",1942.09.23
"Johnny","Smith","123 Elm Street","","Anytown","","","555-1212",1965.03.04
```

Tip:	*If you export to one of the non-text formats and have trouble reading the file, try creating a comma delimited text file instead. Most software packages are able to import comma delimited text files.*

Exporting to Popular Accounting Packages

You can export your giving data directly to a native accounting package file. ChurchWatch supports:

- QuickBooks IIF files
- Quicken QIF files
- Simply Accounting for Windows
- Simply Accounting for DOS

When you select Giving Data in step one of the export, you are given several options as shown in Figure 5-9.

IMPORTANT: Before beginning you will need to create accounts in your accounting package that exactly match the accounts in ChurchWatch including spelling and upper/lower case letters.

Step 1 - Choose the Accounting File Type

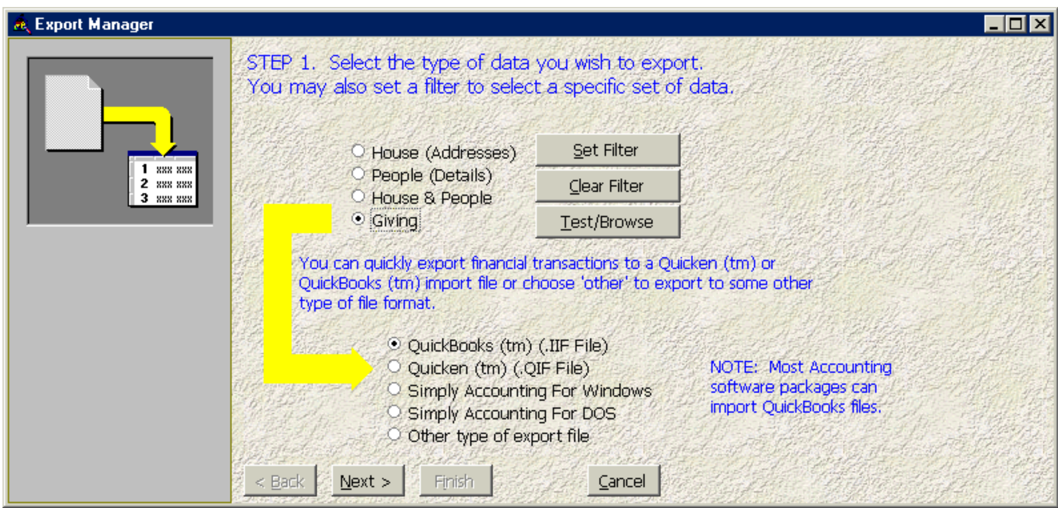


Figure 5-9 Choosing the Accounting File Type

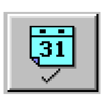
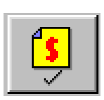
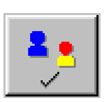
Choose either a QuickBooks IIF file, a Quicken QIF file, Simply Accounting for Windows, Simply Accounting for DOS or other type of export file. Click the NEXT button to move to the next step. If you choose “other” follow the directions under STEP 2 - Choose Specific Fields in the previous section.

Step 2 - Choose the Giving Records to Export

Now you need to choose which giving records you are going to export. Simply clicking on the record will check the check box on that row and mark the record for export. Records that have already been exported are not listed to avoid exporting the same data more than once.

Figure 5-10 Selecting the Giving Records to Export

Since there are usually many records needing export to your accounting package, there are several powerful features on this page to assist you in selecting the correct records. Table 5-1 lists these features.

Form Item	Description
Clicking on a row	Click either on a row or in the check box to check or uncheck the individual record for export. Only checked records are exported.
 Check all, single batch date	Click this button to check off all records for one batch date. You will be prompted for the batch date.
 Check all, single account name	Click this button to check off all records for one specific giving account name. You will be prompted for the account name.
 Check all, single person	Click this button to check off all records for one specific person. You will be prompted for the person's name.

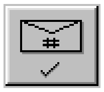
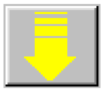
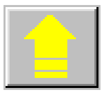
Form Item	Description
 Check all, single envelope number	Click this button to check off all records for one specific envelope number. You will be prompted for the envelope number.
 Check all	Click this button to check off all records listed.
 Uncheck all	Click this button to uncheck all records listed.
Exclude Transactions Already Exported Check Box	To avoid duplicate accounting entries, this box should normally be checked to exclude data you have already exported. If you would like to view records that have already been exported (and even export them again if you wish) uncheck this box. **NOTE:** This is a fairly dangerous operation with respect to keeping your accounting records up to date and for this reason, leave this check box checked whenever possible!

Table 5-1 Accounting Export Features

Sizing the Form, Changing the Sort order and Some Other Useful Features

You can resize the form to any size you are comfortable with. You can also change the sort order of the list simply by clicking on the column header. The width of the fields in the grid can be resized left and right by clicking between the column headers and then dragging either left or right. You can also change the row height by clicking between the rows and then dragging up or down. To reduce the list of records you are dealing with, you can set a data filter in step one - refer to Chapter 26 for information on data filters.

Step 3 - Performing the Export

Once all desired records have been checked, click the FINISH button to begin the export. When prompted, enter the file name of the file you want to place the export data in. You may enter a file extension but it will be replaced with .IIF (QuickBooks) or .QIF (Quicken). For our example above, here is the sample **QuickBooks** file created. The first 3 lines are header information telling QuickBooks what is in this file.

```
!TRNS,TRNSTYPE,DATE,ACCNT,NAME,AMOUNT,MEMO
!SPL,TRNSTYPE,DATE,ACCNT,NAME,AMOUNT,MEMO
!ENDTRNS
TRNS,DEP,11/15/01,Checking Account,Eldon Peters,30.00,
SPL,DEP,11/15/01,Budget,Eldon Peters,-30.00,
ENDTRNS
TRNS,DEP,11/15/01,Checking Account,Helen Smith,40.00,
SPL,DEP,11/15/01,Missions,Helen Smith,-40.00,
ENDTRNS
TRNS,DEP,11/15/01,Checking Account,Shiela Peters,5.00,
SPL,DEP,11/15/01,Kidz Club,Shiela Peters,-5.00,
ENDTRNS
TRNS,DEP,11/15/01,Checking Account,Joe Smith,50.00,
SPL,DEP,11/15/01,Missions,Joe Smith,-50.00,
ENDTRNS
```

Refer to your QuickBooks documentation for information on importing the file.
For our example above, here is the sample **Quicken** file created:

```
D2001.11.15         "D" stands for deposit date
T30.00              "T" stands for transaction amount
NDEP                "N" stands for transaction type (DEP = deposit)
M                   "M" stands for memo and holds your comment
PEldon Peters       "P" stands for payee
Lbudget             "L" stands for catagory (account)
^
D2001.11.15
T40.00
NDEP
M
PHelen Smith
LMissions
^
D2001.11.15
T5.00
NDEP
M
PShiela Peters
LKidz Club
^
D2001.11.15
T50.00
NDEP
M
PJoe Smith
LMissions
^
```

Refer to your Quicken documentation for information on importing the file.

Chapter 6 - Lists

Figure 6-1 ChurchWatch Lists

ChurchWatch maintains several user editable lists in order to make the program as flexible as possible. Before entering data into ChurchWatch you will need to review and possibly add items to some of the lists shown in figure 6-1, excluding the “ChurchWatch Today” item.

You will have to decide which lists need to be created. For example, if you plan to group people you will need to create some church group names in the Church Groups list. If you are using the Giving Manager to track offerings you will need to create items in the Giving Accounts list. The following sections describe each of the ChurchWatch lists.

Tip:	*You can have ChurchWatch auto-format your list names by selecting an auto format method for lists on the FORMATS page of the SETUP form.*

Church Dates

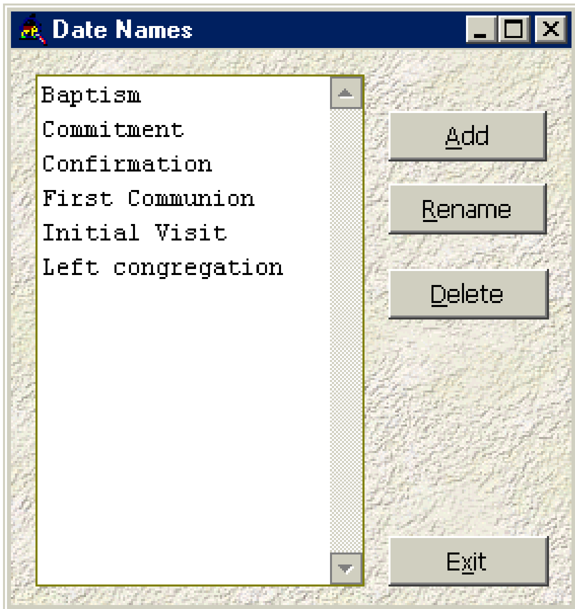


Figure 6-2 Church Dates Editor

You can store any number of special dates for every person in your database. Each date can be given a name of your choosing (refer to the example in figure 6-2). Use the Church Dates Editor to edit the names of the dates you want to keep track of. Table 6-1 lists the form items with their descriptions.

Form Item	Description
List	Lists all defined date names.
Add	Click this button to add a new date name.
Rename	Select a date name, then click this button to rename it.
Delete	Select a date name, then click this button to delete it.
Exit	A list of all people assigned to this group.
Browse	Click this to view all group data in a spreadsheet format.
Exit	Click this to exit the Group Editor.

Table 6-1 Church Dates Editor Form Items

Church Groups

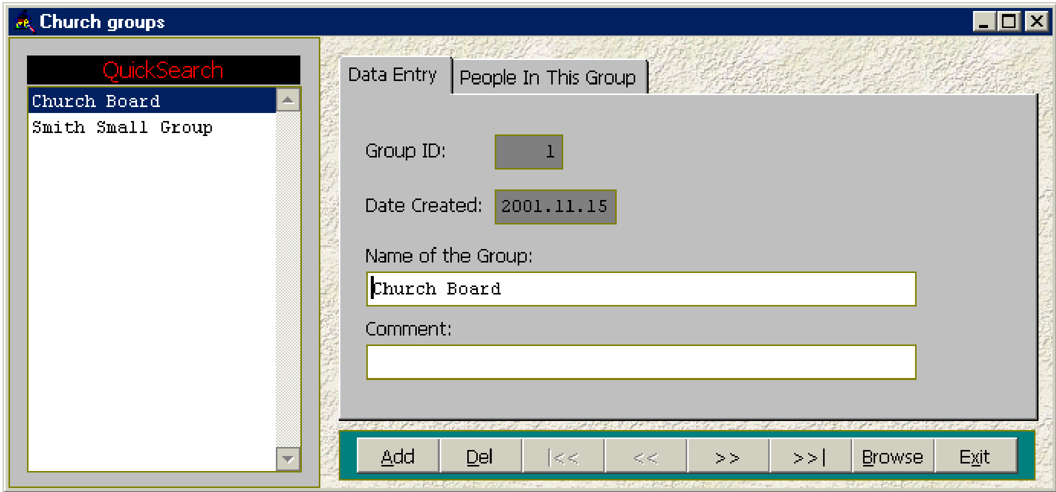


Figure 6-3 Church Group Editor

You can create a list of church group names using the Church Groups Editor. Examples of church groups might be cell groups, prayer groups, small groups, board members, missions group members, People who like pizza etc. Select "Church Groups" from the Lists menu.

Grouping people is very useful in the Mail Manager where you can send a form letter, print mailing labels or do a mail merge to all members of a group. Many reports are also group based. You can add a person to a group or set of groups in the People Manager, Groups page. Perhaps a more convenient way is to add people to the group directly in the Church Group Editor since many people can be added here at once.

Group maintenance is also much easier in the Group Editor since you can see all people in the group at once making it easier to remove a set of people or all people from the group.

Table 6-2 lists the form items with their descriptions.

Form Item	Description
PAGE 1	
Group ID	Used internally by ChurchWatch.
Date Created	The date the group was created.
Name of the Group	Name of the group. This will be auto formatted if list auto formatting is turned on. This field indicates the current group that most buttons on this form will operate on.
Comment	Any comment.
PAGE 2	
List Box	A list of all people assigned to this group.
Add People	Click this button to add people to the current group.
Remove	Select a person in the group and then click this button to remove him/her from the current group.
Remove All	Click this to remove all people from the current group.
BUTTONS	
Add	Click this to create a new group.
Del	Click this to delete the current group.
|<<	Click this to go to the first group in the list.
<<	Click this to go back one group.
>>	Click this to go forward one group.
>>|	Click this to go to the last group.
Browse	Click this to view all group data in a spreadsheet format.
Exit	Click this to exit the Group Editor.

Table 6-2 Group Editor Form Items

Church Facilities

Every church has facilities that need to be managed. Facilities are usually rooms in the church such as meeting rooms, class rooms, the sanctuary, a gym etc. ChurchWatch provides a Church Facilities Editor to allow you to create and maintain a list of facilities. The facilities you define can be booked in the Event and Sunday School Managers. You can view the booking schedule for any given facility from several places in ChurchWatch. ChurchWatch can also warn you if you over book a facility. Before any of this can happen, you need to create a list of facilities specific to your church. Select "Church Facilities" from the Lists menu.

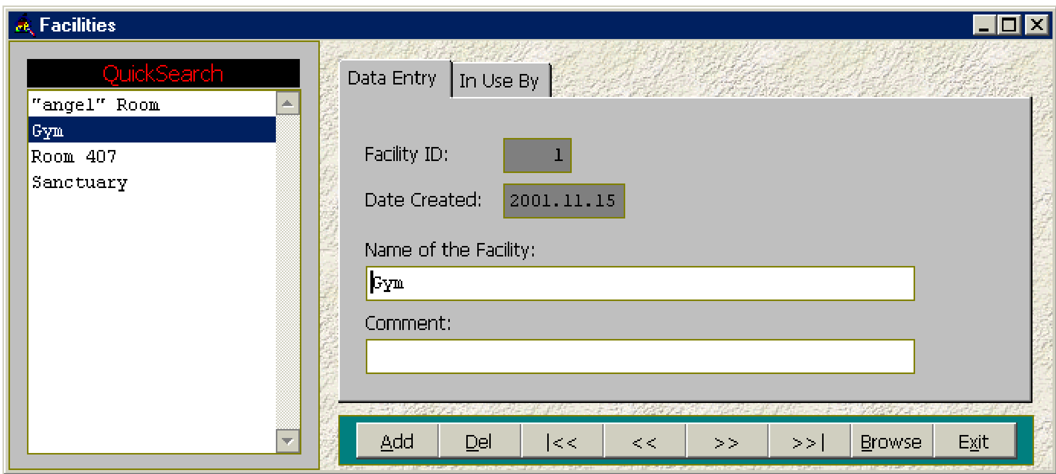


Figure 6-4 Church Facilities Editor

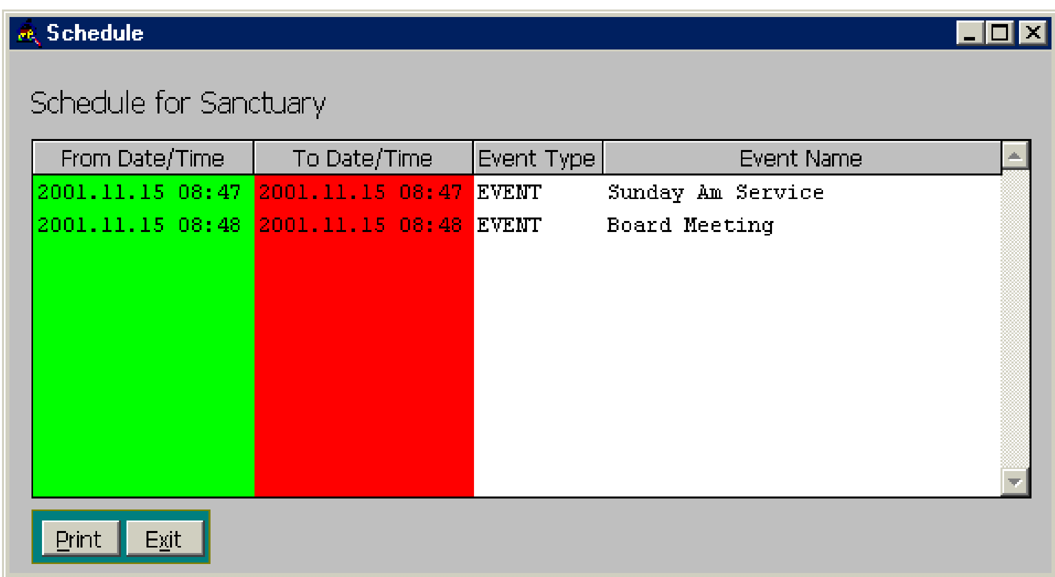


Figure 6-5 Sample Schedule Display (From button on page 2)

<table>
<tr><th>Form Item</th><th>Description</th></tr>
<tr><td>PAGE 1</td><td></td></tr>
<tr><td>Facility ID</td><td>Used internally by ChurchWatch.</td></tr>
<tr><td>Date Created</td><td>The date the facility name was created.</td></tr>
<tr><td>Name of the Facility</td><td>Name of the facility. This will be auto formatted if list auto formatting is turned on. This field indicates the current facility that most buttons on this form will operate on.</td></tr>
<tr><td>Comment</td><td>Any comment.</td></tr>
<tr><td>PAGE 2</td><td></td></tr>
<tr><td>List Box</td><td>A list of all events and classes that use this facility.</td></tr>
<tr><td>Schedule</td><td>Click this to view the detailed schedule listing for the facility. Figure 6-4 shows an example schedule.</td></tr>
<tr><td>Remove</td><td>Select an event or class and then click this button to remove the facility from the selected event or class.</td></tr>
<tr><td>BUTTONS</td><td></td></tr>
<tr><td>Add</td><td>Click this to create a new facility.</td></tr>
<tr><td>Del</td><td>Click this to delete the current facility.</td></tr>
<tr><td>|<<</td><td>Click this to go to the first facility in the list.</td></tr>
<tr><td><<</td><td>Click this to go back one facility.</td></tr>
<tr><td>>></td><td>Click this to go forward one facility.</td></tr>
<tr><td>>>|</td><td>Click this to go to the last facility.</td></tr>
<tr><td>Browse</td><td>Click this to view all facility data in a spreadsheet format.</td></tr>
<tr><td>Exit</td><td>Click this to exit the Facilities Editor.</td></tr>
</table>

Table 6-3 Facilities Editor Form Items

Church Resources

Every church has resources that need to be managed. A "Resource" is another name for an "Asset". Resources are assets that the church owns and needs to track for insurance, booking, lending, scheduling or other reasons. ChurchWatch provides a Resource Editor to allow you to create and maintain a list of resources and even store a photo of the resource. The resources you define can be booked in the Event and Sunday School Managers. You can view the booking schedule for any given resource from several places in ChurchWatch. ChurchWatch can also warn you if you over-book a resource. Before any of this can happen, you need to create a list of resources specific to your church. Select "Church Resources" from the Lists menu.

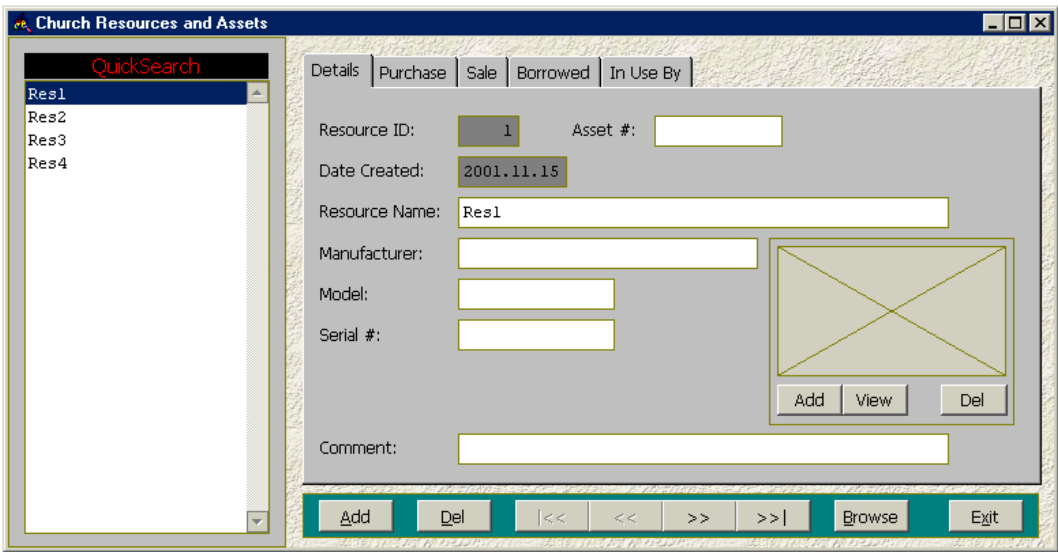


Figure 6-6 Resource Editor

Tip:	*If you decide to track your church resources using the Resource Editor, remember to keep a backup of your ChurchWatch data off-site in case of a fire. This listing would be useful for insurance purposes.*

Form Item	Description
PAGE 1	
Resource ID	Used internally by ChurchWatch.
Date Created	Date resource name was created.
Asset #	If your church keeps asset numbers enter it here. ChurchWatch will not use it except to print it on reports.
Resource Name	Name of the resource. ***NOTE:*** *If the name of the resource has a red background it indicates that the resource is currently lent out - check the Borrow Page to see who has it.* This item will be auto formatted if list auto formatting is turned on. This field indicates the current resource that most buttons on this form will operate on.
Manufacturer	Company that manufactured the resource item.
Model	Model number.
Serial #	Serial number.
Add (Photo)	Click this to add a photo of the resource. The photo must be in .BMP format.
Del (Photo)	Click this to delete the photo.
View (Photo)	Click this to view a larger copy of the photo.
Comment	Any comment.
PAGE 2	
Purchased By	Person who purchased the resource item.
Purchase Date	Date the resource was purchased.
Purchase Price	Amount paid for the resource.
Warranty Expires	Warranty expiry date.
Vendor Contact Info and Notes	Name, address, phone, free form notes etc of the company, organization or individual that the resource was purchased from. You can enter anything you want in this edit box.
PAGE 3	
Date Sold	Date the resource was sold.
Sale Price	Sale price.
Sold To and Contact Information	Name, address, phone, free form notes etc of the company, organization or individual the resource was sold to. You can enter anything you want in this edit box.
PAGE 4	

Form Item	Description
Borrowed By	Name of person who currently has the resource borrowed. Can only be borrowed by a person listed in the People Manager. ***NOTE:*** *The present version of ChurchWatch does not consider borrowed items when checking for resource conflicts. Keep this in mind when lending out items that may be required by church events or classes.*
Date Borrowed	Date the resource was borrowed.
Set	Click this to select the name of the person borrowing the resource.
Clear	Click this to clear the borrower’s name.
PAGE 5	
List Box	A list of events and classes that are using this resource.
Schedule	Click this to view the detailed schedule listing for the resource. Figure 6-4 shows an example schedule.
Remove	Click this button to remove the current resource from the selected event or class.
BUTTONS:	
Add	Click this to create a new resource.
Del	Click this to delete the current resource name.
|<<	Click this to go to the first resource.
<<	Click this to go back one resource.
>>	Click this to go forward one resource.
>>|	Click this to go to the last resource.
Browse	Click this to view all resource data in a spreadsheet format.
Exit	Click this to exit the Resource Editor.

Table 6-4 Resource Editor Form Items

Giving Accounts

If you intend to use the Giving Manager to track offerings or pledges, you will need to create a list of giving accounts that each offering or pledge can be assigned to. ChurchWatch provides a Giving Account Editor for this purpose. Note that once an account is used in the Giving Manager it cannot be deleted until either the record(s) in the Giving Manager are deleted or have their account altered, or the giving data is archived at year end. Select "Giving Accounts" from the Lists menu.

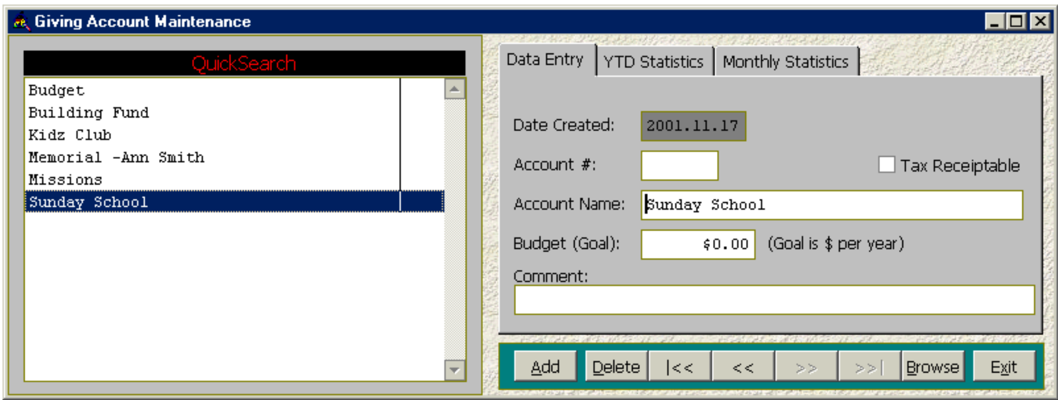


Figure 6-7 Giving Account Editor

Form Item	Description
PAGE 1	
Date Created	Date the giving account was created.
Account #	You can assign a numeric account number to the account.
Receiptable	Check this box if the giving account is tax receiptable. The receiptable status of any transaction in the Giving Manager can be altered at any time. The value of this will be the default for use at entry time. ***Important:*** *Only records marked receiptable will be included on tax receipts and on the Substantiation of Contributions Report.*
Account Name	Name of the account. This item will be auto formatted if list auto formatting is turned on. This field indicates the current account that most buttons on this form will operate on.
Budget	Set a yearly budget goal for this account by filling in this field.
Comment	Any comment.
PAGE 2	
Table	The table on this page shows the year-to-date totals for all accounts you have created.
PAGE 3	
Table	The table on this page shows the monthly totals for all accounts you have created.
BUTTONS	
Add	Click this to create a new giving account.
Del	Click this to delete the current giving account name. You cannot delete accounts that are in use.
|<<	Click this to go to the first account.
<<	Click this to go back one account.
>>	Click this to go forward one account.
>>|	Click this to go to the last account.
Browse	Click this to view all account data in a spreadsheet format.
Exit	Click this to exit the Giving Account Editor.

Table 6-5 Giving Account Editor Form Items

Marital Status

You can enter your own marital status names for use in the People Manager by using the Marital Status Editor. Select “Marital Status” from the Lists menu.

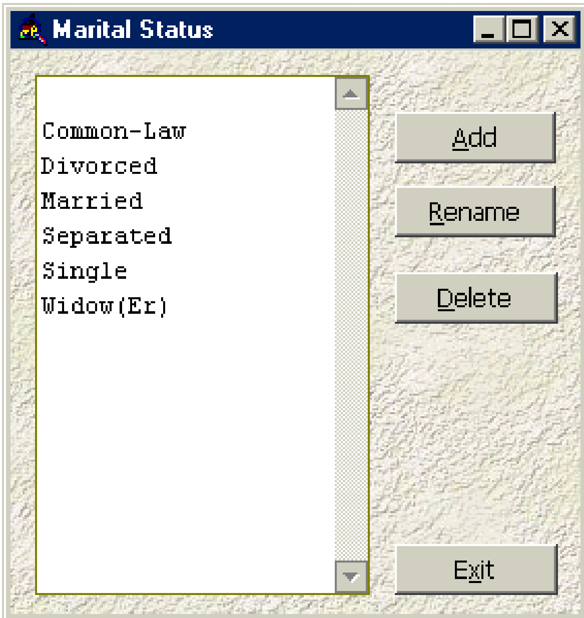


Figure 6-8 Marital Status Editor

Form Item	Description
List	The list at the left of the form lists all currently defined marital status names. The first item in the list is always a blank item and it cannot be deleted. Click inside this list to select a marital status type for renaming or deletion.
Add	Click this to create a new marital status type.
Rename	Click this button to rename the current selected type.
Delete	First select an item from the list and then click this to delete the marital status.
Exit	Click this to exit.

Table 6-6 Marital Status Editor Form Items

Membership Types

You can enter your own church membership types for use in the People Manager by using the Membership Type Editor. Example membership types might be “Full”, “Youth”, “No” etc. Select “Membership Types” from the Lists menu.

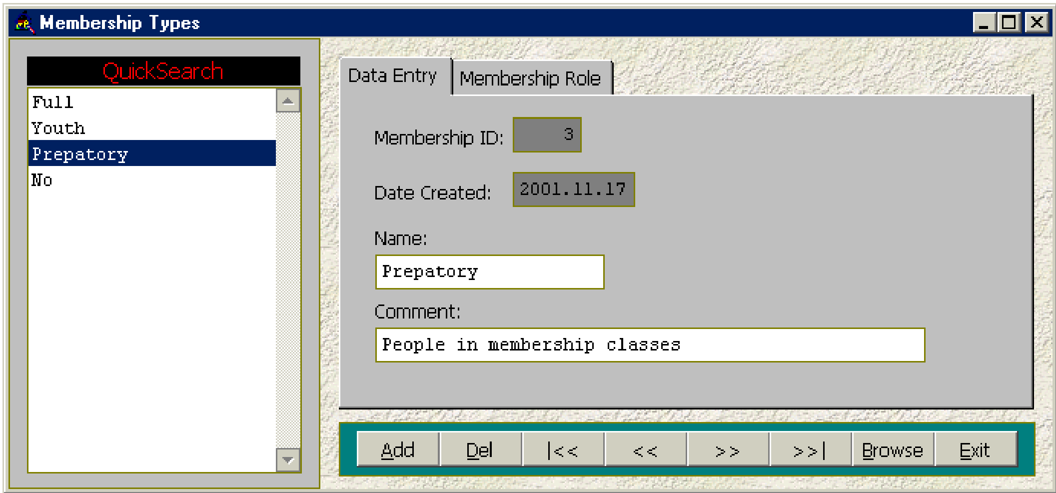


Figure 6-9 Membership Types Editor

Form Item	Description
PAGE 1	
Membership ID	Used internally by ChurchWatch.
Date Created	Date this membership type was created.
Name	Name of the membership type. This item will be auto formatted if list auto formatting is turned on. This field indicates the current type that most buttons on this form will operate on.
Comment	Any comment.
BUTTONS	
Add	Click this to create a new membership type.
Del	Click this to delete the current membership type.
|<<	Click this to go to the first membership type.
<<	Click this to go back one membership type.
>>	Click this to go forward one membership type.
>>|	Click this to go to the last membership type.
Browse	Click this to view all membership types in a spreadsheet format.
Exit	Click this to exit the Membership Types Editor.

Table 6-7 Membership Types Editor Form Items

Special Awards

From the Sunday School Manager you can assign special awards to people. Awards are defined in the Award Editor. Award handling is unique since deleting an award from the awards list will not remove copies of the award already assigned to people. Select "Special Awards" from the Lists menu.

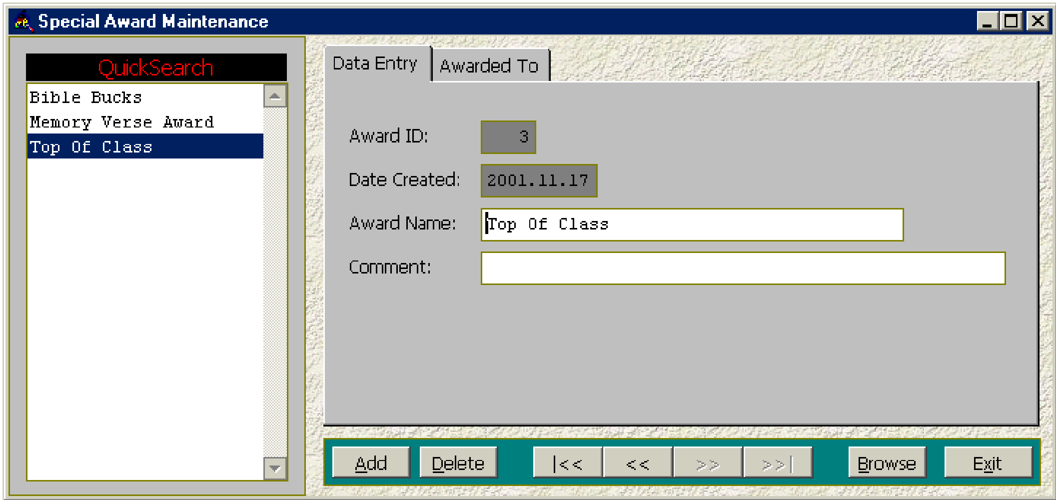


Figure 6-10 Special Awards Editor

Form Item	Description
PAGE 1	
Award ID	Used internally by ChurchWatch
Date Created	Date the award was created.
Award Name	Name of the award. This item will be auto formatted if list auto formatting is turned on. This field indicates the current award that most buttons on this form will operate on.
Comment	Any comment.
PAGE 2	
Table	A list of all people who have the current special award.
Add People	Click this button to add people to the list.
Remove	Select a person and then click this button to remove him/her from the list.
Remove All	Click this button to remove all people from the list.
BUTTONS	
Add	Click this to create a new award.
Del	Click this to delete the current award name.
|<<	Click this to go to the first award.
<<	Click this to go back one award.
>>	Click this to go forward one award.
>>|	Click this to go to the last award.
Browse	Click this to view all awards in a spreadsheet format.
Exit	Click this to exit the Special Awards Editor.

Table 6-8 Special Awards Editor Form Items

Special Needs

Adults and children in your church may have special needs that Sunday School teachers and others will need to know about. You can create a list of special needs and then assign them to people. Some examples of special needs might be “Asthma”, “Wheel Chair Access” or “Allergic to Bee Stings”. There are several reports pertaining to special needs and you can target a group of people with one special need in the Mail Manager to create mailings, mailing labels, etc. Select “Special Needs” from the Lists menu.

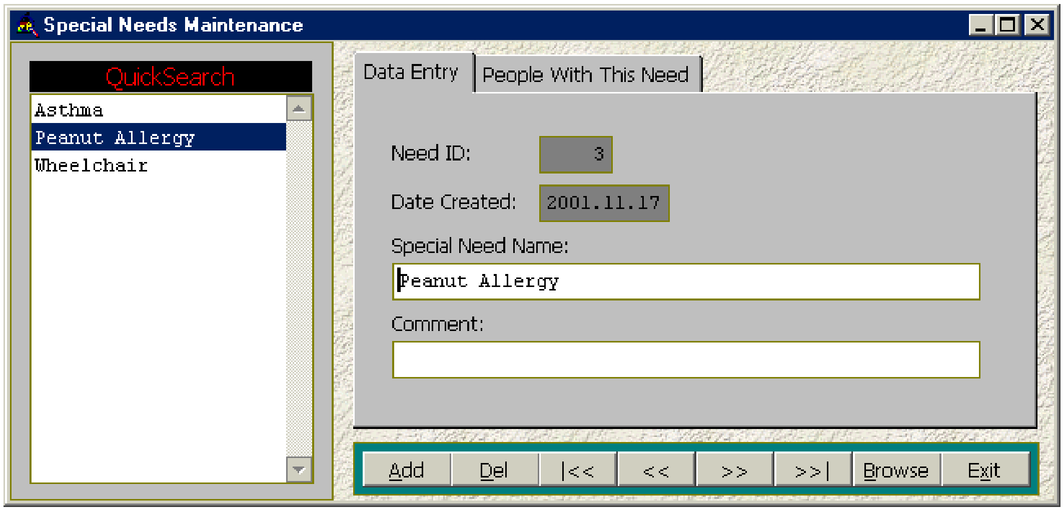


Figure 6-11 Special Needs Editor

You can add a person to one or more special needs groups in the People Manager, Needs page. Perhaps a more convenient way is to add people to the group directly in the Special Needs Editor since many people can be added at once here.

Special Need maintenance is also much easier in the Special Needs Editor since you can see all people in the group at once making it easier to remove a set of people or all people from the group.

Form Item	Description
PAGE 1	
Need ID	Used internally by ChurchWatch.
Date Created	The date the need name was created.
Special Need Name	Name of the special need. This will be auto formatted if list auto formatting is turned on. This field indicates the current need that most buttons on this form will operate on.
Comment	Any comment.
PAGE 2	
List Box	A list of all people who have this need.
Add People	Click this button to add people to the group with the current need.
Remove	Select a person in the needs group and then click this button to remove him/her from the current needs group.
Remove All	Click this to remove all people from the current need group. This will not actually delete any people records, just remove the need.
BUTTONS	
Add	Click this to create a new special need.
Del	Click this to delete the current special need.
|<<	Click this to go to the first need in the list.
<<	Click this to go back one need.
>>	Click this to go forward one need.
>>|	Click this to go to the last need.
Browse	Click this to view all special need data in a spreadsheet format.
Exit	Click this to exit the Special Needs Editor.

Table 6-9 Special Needs Editor Form Items

Time & Talents

Finding volunteers for various jobs that need doing around the church can be a challenge. The Time and Talents List and T&T Page in the People Manager can help you find the people you need. The Time and Talents Editor is the method by which you can create a list of hobbies, interests, skills, spiritual gifts, ministries and any other item you can think of. Select "Time & Talents" from the Lists menu.

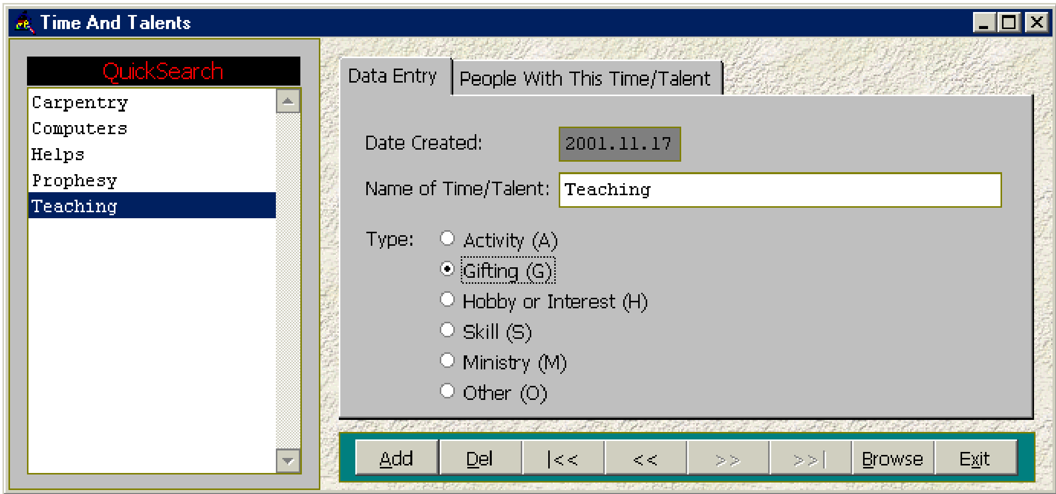


Figure 6-12 Time and Talents Editor

Form Item	Description
PAGE 1	
Date Created	Date the time/talent was created.
Name of Time/Talent	Name of the time/talent. This will be auto formatted if list auto formatting is turned on. This field indicates the current time/talent that most buttons on this form will operate on.
Type	Type. One of: A Activity G Gifting H Hobby or Interest S Skill M Ministry O Other
PAGE 2	
List Box	A list of all people who have or are involved with this time/talent.
Add People	Click this to add people to the list of people who have or are involved with the current time/talent.
Remove	Select a person and then click this to remove him/her from the group of people that have the current time/talent.
Remove All	Click this to remove all people from the group of people who have this time/talent.
BUTTONS	
Add	Click this to create a new time/talent.
Del	Click this to delete the current time/talent.
|<<	Click this to go to the first time/talent.
<<	Click this to go back one time/talent.
>>	Click this to go forward one time/talent.
>>|	Click this to go to to the last time/talent.
Browse	Click this to view all time/talent data in a spreadsheet format.
Exit	Click this to exit the Time & Talent Editor.

Table 6-10 Time and Talents Editor Form Items

Titles

You have the option of entering titles for people such as Mr., Mrs., Ms., etc in the People Manager. Doing so will give you the option of creating more formal mailing labels in the Mail Manager. For example "Mr. and Mrs. Joe Smith" rather than "Joe and Helen Smith". Before you can do so you will need to create the titles using the Titles Editor. Select "Titles" from the Lists menu.

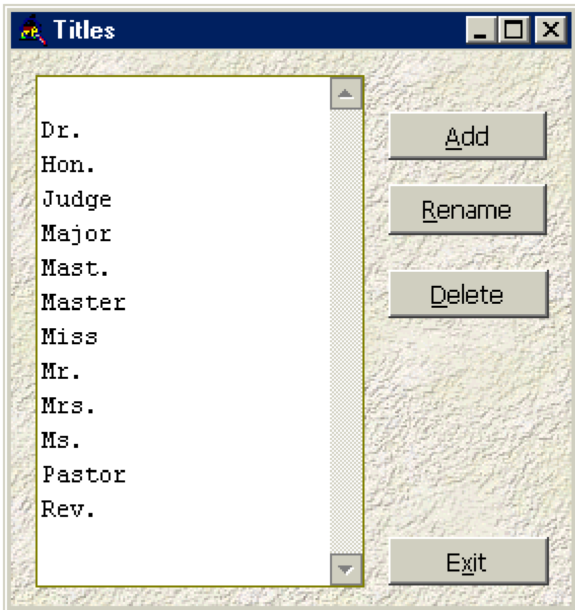


Figure 6-13 Titles Editor

Form Item	Description
List	The list at the left of the form lists all currently defined titles. The first item in the list is always a blank item and it cannot be deleted.
Add	Click this to create a new title.
Rename	First select a title from the list and then click this to rename it.
Delete	First select a title from the list and then click this to delete it.
Exit	Click this to exit the Titles Editor.

Table 6-11 Titles Editor Form Items

Reports

There are many reports available relating to all of the different ChurchWatch lists. Refer to Chapter 17 for information about the Report Manager.

To-Do List

You can keep a simple, personal, checklist of things to do using the To-Do List. Figure 6-14 shows the To-Do list form. Click “To-Do List” from the main menu or select it from the “Forms” menu. The to-do list is not considered to be a ChurchWatch list since it is not a setup type of list.

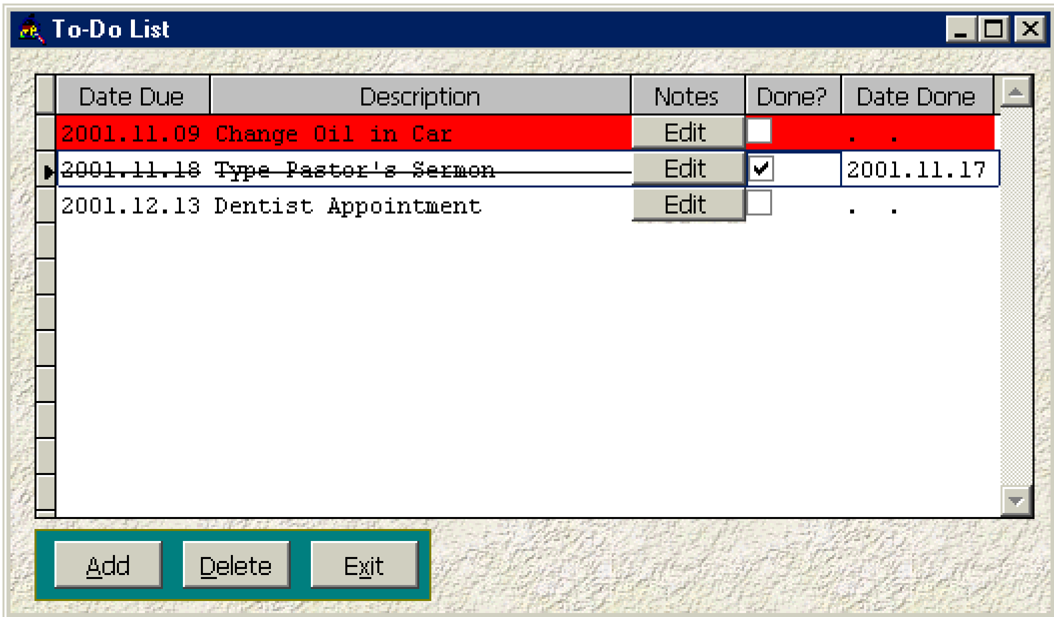


Figure 6-14 Personal To-Do List

Each user has his/her own private and personal to-do list. Items entered here cannot be seen by other users. Click the ADD button to add an item and then fill in the blanks. Select an item and click DELETE to remove it. You can also keep free-form notes for each item by clicking the EDIT button. When the item is done check the done checkbox and the item will be struck from the list.

Note: *Items shown in red are past due.*

Chapter 7 - Security and User Name Maintenance

Why Do You Need Security?

ChurchWatch has several layers of security built into it. The product is shipped with security turned off to make it easier for first time users. When security is turned on you will be required to login to gain access to ChurchWatch. That means you will need a login name and a password. Not only is the use of the security features recommended, your government's laws may actually require that your church records be protected.

Although many people may have access to the church computer(s), and therefore ChurchWatch, only the people you give user names and passwords to will actually be able to enter the program.

Passwords used in ChurchWatch are stored encrypted to minimize chances that someone would be able to "crack" the security system. As well, when passwords are typed in, the characters are not shown on the screen.

You will need to designate one person to be the ChurchWatch administrator and an "admin" user account is supplied for this purpose. The "admin" account cannot be deleted or modified.

It is HIGHLY recommended that you turn on security as soon as you are comfortable with ChurchWatch.

What Parts of the Program Are Protected?

In ChurchWatch Version 2, all areas of the program can be protected in detail with View/Modify and/or Delete access privileges.

Turning Security On or Off

Security is turned on by unchecking the "Disable All Security" checkbox on the SECURITY page of the SETUP form (refer to figure 7-2). Once security is turned on only the "admin" user will have access to the SECURITY page from that point on. Only the "admin" user has permission to add or delete user accounts.

To turn off security (not recommended) login as "admin" and check the "Disable All Security" checkbox on the SECURITY page of the SETUP form.

Once security is turned on a login form will appear each time you start ChurchWatch as shown in figure 7-1. In order to gain entry into ChurchWatch you will need a user account and password. These can only be created by the ChurchWatch administrator.

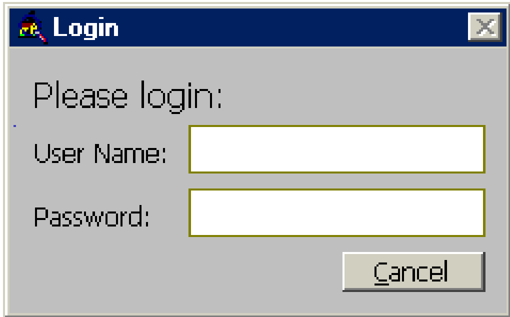


Figure 7-1 The Login Form

The "admin" Account

ChurchWatch is shipped with an "admin" user name already defined. The default password is "lion". The first time you login you will need to use the "admin" user name. The user name and password are case sensitive so "admin" and "lion" should be typed into the login form in lowercase and without the quotes. Press the Enter key once you have entered the password.

You will need to designate one person as the ChurchWatch administrator. The person you choose should be very trustworthy since he/she will have unlimited access to ChurchWatch and all user accounts.

As the administrator, your first job should be to change the password from "lion" to something secret that only you know. Never write your password down where someone could find it and never use simple passwords such as the names of your children.

Once you have changed your login password you are ready to create user accounts if other users will require access to ChurchWatch.

Tip: *Do not forget your password! If you forget the password to the "admin" account there is no way to modify user accounts in ChurchWatch or to perform maintenance functions. Refer to the section "What if I Forget My Password?" later on in this chapter.*

User Names and Passwords

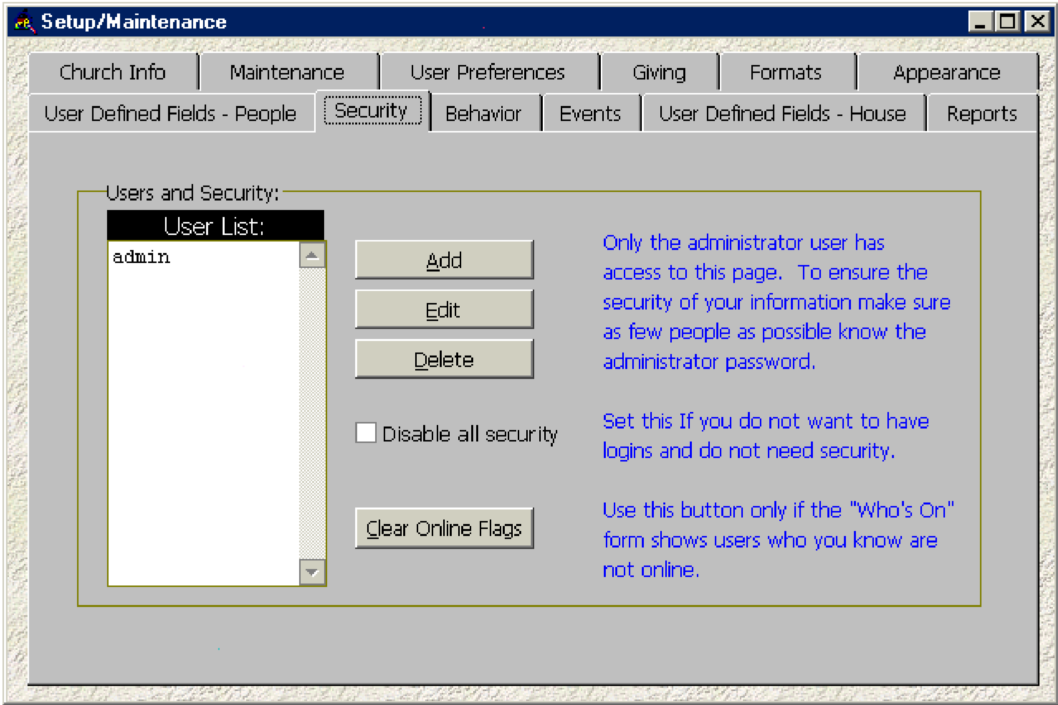


Figure 7-2 Security Page of the Setup Form. (Only the "admin" user has access)

Adding, deleting and editing of user accounts can only be performed if you are logged in as "admin" or if security is turned off. First find the SECURITY page of the SETUP form as shown in figure 7-2.

Adding or Editing a User Account

To create a new ChurchWatch user name, click the ADD button. You will be prompted for the name of the user. Note that user names are case sensitive, meaning that the user name is sensitive to upper and lower case letters. It will have to be typed in at login time exactly the way you create the name here. Once you have entered the name, the form shown in figure 7-3 will be displayed. The default password is exactly the same as the user's name but at this point you have the opportunity to change the password and set the access privileges for the user. It's probably best to just leave the password the same as the login name for now and let the user select their own password after they have logged into ChurchWatch for the first time. You can decide now or later on the user's access privileges.

To Edit the user's name, password or access privileges at a later time, you can click the EDIT button (refer to figure 7-2). The same form shown in figure 7-3 will be displayed.

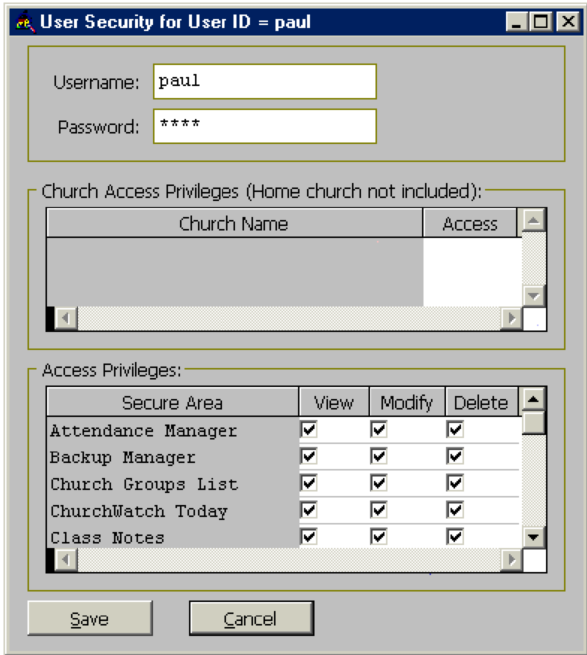


Figure 7-3 User Name Attributes

Modifying Access Privileges

ChurchWatch Version 2 provides the ability the modify the access rights of each user to a very detailed level. Refer to figures 7-2 and 7-3 above. Select a user and click the EDIT button to edit the user's access rights. The form shown in figure 7-3 will be displayed. The first list allows you to control a users access to other church databases if you are using the multi-church features of ChurchWatch. With this list you can allow or disallow complete access to the data of the specified church. The second list labeled "Access Privileges" allows you to control the user's access to various parts of the ChurchWatch program. Find the item(s) of interest at the left side of the list and then check or uncheck the checkboxes at the right. You have a choice of View, Modify and Delete access. "View" access means that the user can view data. "Modify" means that the user can change what he or she sees. "Delete" means that the user can also delete records for the selected access item. For example, if you select the item "Giving Manager" and then check View but uncheck Modify and Delete, the user will have access to the Giving Manager but will not be able to modify or delete any of the data he or she sees there.

Deleting a User Account

To delete a user name, first select it from the list on the left side of the SECURITY page on the SETUP form. Then click the DELETE button. Deleting a user will also delete all the user's messages from the Message Manager.

Note: *The "admin" account can never be deleted.*

Tip:	*User names and passwords are case sensitive, meaning that upper and lower case letters are significant. If you are having trouble logging on check your CAPS LOCK key.*

Clearing the "Online" Flags

ChurchWatch keeps track of who is logged on at any given time. In the event of a power outage or PC crash, this information will be left corrupted. When this happens you may see more users logged in under FILE-WHOS ON than are actually logged in. In addition, the maintenance functions in the program, such as re-indexing the database, may return errors indicating that other users are logged on when in fact this is not the case. To correct this situation simply click the CLEAR ONLINE FLAGS button. You should only do this if you know you are the only user logged into ChurchWatch.

Changing Your Password

Once you are logged into ChurchWatch you can change your password either by selecting FILE-SET PASSWORD or by using the CHANGE YOUR PASSWORD button on the USER PREFERENCES Page of the SETUP form. You will need to enter your existing password and the new one. Remember that passwords and user names are case sensitive. Your password will be stored encrypted for further protection. This feature is only available when security is turned on.

Checking Who's Online

You can see who is currently logged into ChurchWatch by selecting FILE-WHOS ON. This feature is only available when security is turned on. If the same user is logged in more than once (not recommended) you will only see one instance here.

Message Manager

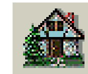
When security is turned on you can use the Message Manager to send inter-office messages between users of ChurchWatch. The Message Manager has an advantage over regular e-mail in that even if your church has only one computer and no network, it can still be handy to be able to leave messages for other users. Refer to chapter 16 for more information on the Message Manager.

What If I Forget My Password?

If you forget your password you will need to see the ChurchWatch Administrator. The administrator will be able to change your password.

If you are the "admin" user and you have forgotten your password you will need to contact White Mountain Software. **Note that we will only give out access information to the contact person that purchased the software.** If your contact person leaves the church you should contact White Mountain Software so that we can update our records.

Chapter 8 - The Household Manager



Keeping Track of Church Families, Visitors, Contacts and Vendors

Most churches purchase Church Management Software to at least keep track of names and addresses of people attending and visiting their church. ChurchWatch is organized into a Household Manager to keep track of family or household groupings (not all people in a household have to be related) and addresses and a People Manager to keep track of details about people. The Household Manager is basically a Contact Manager.

Tip:	*When adding people you should always start here to add BOTH the family and the family members. Then move to the People Manager to add detail to the person data.*

Tip:	*When adding family members (people) add them in authority order - Main contact first, then spouse, children, others. ChurchWatch will attempt to guess the gender and authority level as you enter the members. This feature reduces data entry time.*

The Household Manager has four (4) primary uses:

8. To keep track of addresses

9. To group people into a family unit or household

10. To keep track of visitors, contacts and vendors

11. To define and store a family photo

There are also user defined fields to allow you to keep track of anything else you can think of related to a family unit.

All membership/people data entry must begin in the Household Manager since all people entered into ChurchWatch must belong to a household. The household defines the common address and phone numbers for a family or a contact. Typically you create a family first and then you enter the names of the people belonging to the family. Note that family members can have different last names (handled in the People Manager) but only one common family name is entered as a reference in the Household Manager - this is usually the last name of the main contact person of the household.

You can also use the Household Manager as a simple way to keep track of contacts and vendors. Contacts are generally people outside of the church for which you need to store contact information. Vendors can be businesses that the church uses on a casual or frequent basis such as a local print shop.

The Input Form

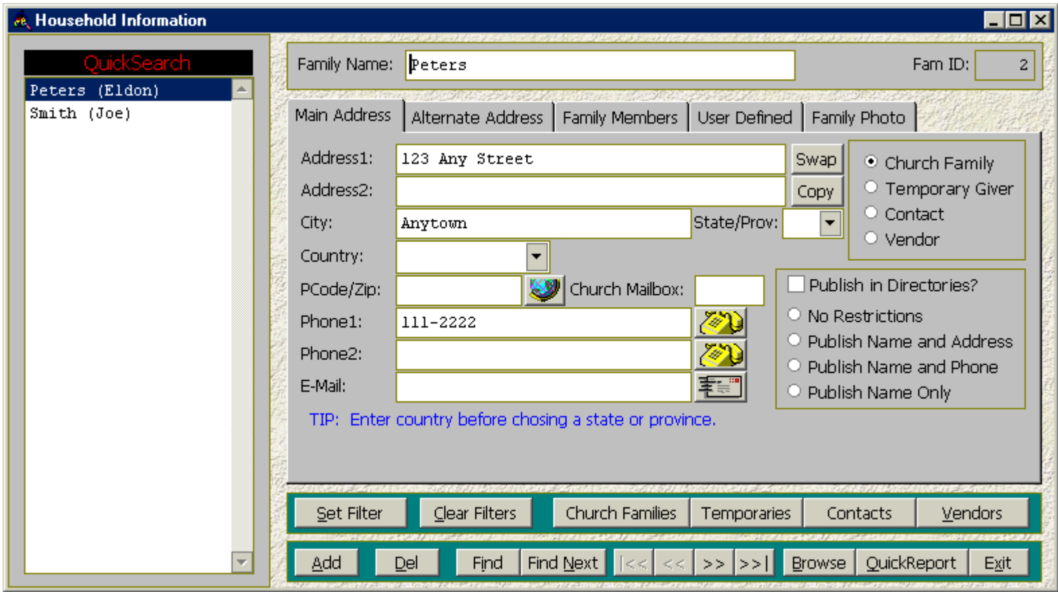


Figure 8-1 The Household Manager Input Form

Family ID

The family ID field is used internally by ChurchWatch. It cannot be modified.

The Main Address Page

The Household Manager has five (5) pages. The first is labeled “Main Address” and displays the primary address for the contact or family. This is the address that will appear in all reports and church mailings. To make a change simply click the mouse in one of the data entry windows (e.g. City) and begin to type.

Tip:	*Set the Country field before setting the State/Province field.*

Alternate Address Page

The second page displays the secondary or alternate address for the contact or family. This is an excellent place to store seasonal addresses such as the summer cottage or winter get-away. Select this page by clicking on the page header. To make a change simply click the mouse in one of the data entry windows (e.g. City) and begin to type. Note that the alternate page header will be shown in bold as a reminder whenever there is data entered for the alternate address.

Tip: *Set the Country field before setting the State/Province field.*

Family Members Page

The third page is used to enter people that will be associated with the family unit or contact name. For example, these can be people in the family, people living at the designated address or people who work at the business. If you have a screen resolution of at least 1024x768 pixels, the members list can also be displayed on ALL pages of the Household Manager for convenience. To cause this to happen stretch the form vertically until the members list pops open. Note that this behavior occurs only if the appropriate checkbox is checked on the BEHAVIOR page of the SETUP form.

User Defined Page

The fourth page is labeled “User Defined” and it contains several fields that you can setup to be anything you want. To access this page click on the page header. The titles for these fields can be set on the SETUP form on the USER DEFINED FIELDS - HOUSE page (refer to Chapter 4). Table 8-1 lists the user defined fields, their types and allowable field lengths.

Field Name	Type	Length	Decimals
Char Field #1	alphanumeric (text and numbers)	30	
Char Field #1	alphanumeric (text and numbers)	30	
Check #1	logical (true/false)		
Check #2	logical (true/false)		
Num Field #1	numeric	7	0
Num Field #2	numeric	7	2

Table 8-1 User Defined Fields, Household Manager

Family Photo Page

The fifth page is labeled “Family Photo”. Use this page to store and maintain a family photo. You can also enter caption text here.

Church Directories

ChurchWatch provides several church directory and photo directory reports. Occasionally families do not wish to be published in the church directory. In addition, you probably do not want to list casual visitors, contacts and vendors in the church directory. The "Publish in Directories" checkbox is used to indicate if this family/household should be published or not. Check the box to publish a family or uncheck it to hide the family from church directory reports. You can also specify the level of detail that you want published. Choices are No Restrictions, Publish Name and Address, Publish Name and Phone, and Publish Name Only.

Type of Contact

The Household Manager can keep track of several types of contacts. The type is selected on the Main Address page. "Church Family" refers to a family that either attends regularly or is a casual visitor. "Temporary Giver" refers to someone who gives an offering (and must therefore be tracked for tax purposes) but does not attend church regularly. Temporary Givers can be automatically deleted at year end when the giving and pledge data is archived. This item is discussed in more detail in the Giving Manager, chapter 10. "Contact" refers to a person or family outside of the church that you need to store contact information about. "Vendor" refers to a business that the church works with or any business for which you want to store contact information about.

Tip: *Anyone stored in the Household Manager can give an offering regardless of the type of contact.*

Household Members

On the "Family Members" page or near the bottom of the form you will see a table grid listing each of the members of the current household or family. There are also some buttons to the left that allow you to manipulate the list. Refer to figure 8-2.

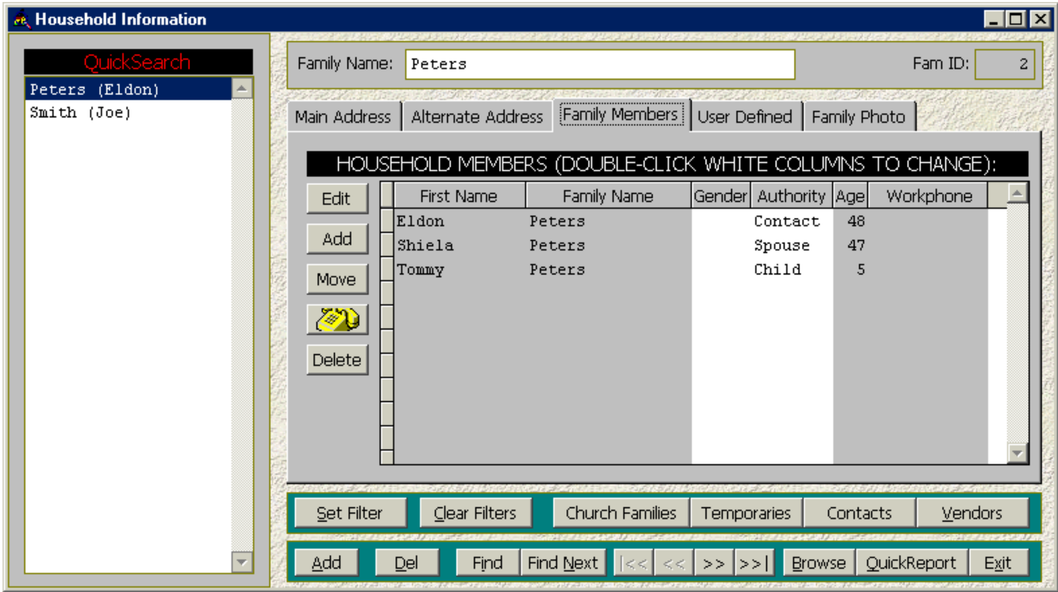


Figure 8-2 Household/Family Members

This list is the link to the People Manager. Details about each of the persons listed can be found there. **Lines shown in light blue indicate a deceased person.**

Click the ADD button to add a new member to the household. The same family name will automatically be used but you can change the family name for any member in the People Manager. Note that people listed in a household do not have to be related or even share the same last name. They simply share the same address. To change the last name select a person and then click the EDIT button to go to the People Manager record for the selected person. You can also move a person to another household, for example, when children move to their own dwelling, by clicking the MOVE button (you may need to create a new household first). Finally, you can also delete a person by first selecting the person (click the mouse on any person record) and then by clicking the DELETE button.

When you add a new person to a household, ChurchWatch automatically tries to predict the gender and authority of the person you are adding. If the gender or authority level that ChurchWatch picks are incorrect you can simply double click your mouse on the gender or authority to choose the next logical value. For example, if the gender chosen was male (“M”) and the correct gender is female, double click on the gender value (“M”) and it will change to “F” for female. You can also double click on the authority field to change it. Both of these fields can also be changed in the People Manager. During data entry you will find it advantageous to enter families in authority order - main contact, spouse followed by children and others.

Important:	*When changing the authority field, the record positions may change. You should be aware of this so you don’t accidentally change the wrong record.*

Tip:	*Double click the first name field to open the People Manager record for the selected person.*

The Form Buttons

This section describes each of the buttons on the Household Manager form.

Button Title	Description
PAGE 1/PAGE 2	
Swap	Click this button to swap the main and alternate addresses for the current family.
Copy Address	Click this button to copy the address presently in view to the Windows clipboard. You can then "paste" the address into any other Windows application. The paste operation in most Windows applications is CTRL-V. You may also find it under EDIT-PASTE in the top-of-screen menu for the application of interest. This feature is very handy for copying formatted addresses into word processors and spreadsheet applications.
Pcode/Zip Globe	Click the globe button to have ChurchWatch access the internet to product a map showing the location of the address based on the postal code or zip code. The postal/zip code must be valid and you must have a "live" connection to the internet.
Phone	Click the phone buttons to open the phone dialer. Refer to chapter 25.
E-Mail	Click the email button to open your email program with the email address of this family already filled in for you.
PAGE 3	
Edit	Click the Edit button to open the People Manager showing the details for the currently selected person.
Add	Click the Add button to add a person to the family or contact.
Move	Click the Move button to move the currently selected person to another address.
Phone	Click the phone button to open the phone dialer.
Delete	Click the Delete button to delete the currently selected person.
PAGE 5	
Add Photo	Click this button to specify the filename of the family photo. BMP, JPG and GIF files are supported.
View	Click the View button to zoom in on the photo.
Delete Photo	Click the Delete button to delete the family photo.
BUTTONS	
Set Filter	Click this button to set a data filter. Refer to chapter 26.
Clear Filters	Click this button to clear the current data filter.
Church Families	Click this button to show church families only.
Temporaries	Click this button to show temporary givers only.
Contacts	Click this button to show contacts only.
Vendors	Click this button to show vendor names only.

Button Title	Description
Add	Click the ADD button to create a new family.
Del	Click the DEL button to delete the current family or contact and all people within the family or contact. If the family or members of the family have made giving contributions, ChurchWatch will not permit you to delete.
Find	Click the FIND button to find a family or contact by name. When doing a find, only the first few letters of the name of interest need to be entered. The find will locate and show the **first occurrence** found.
Find Next	Repeats the last find. This is handy if you have more than one family with the same last name since the FIND button will only find the first occurrence.
|<<	Click this to go to the first record in the Household Manager.
<<	Click this to go back one record.
>>	Click this to go forward one record.
>>|	Click this to go to the last record in the Household Manager.
Browse	Click this to view all households in a spreadsheet format.
QuickReport	Click this to get a quick report of all households in the current data filter or if no filter is in effect, all households.
Exit	Click this to exit the Household Manager.

Table 8-1 Household Manager Button Summary

Family Photos

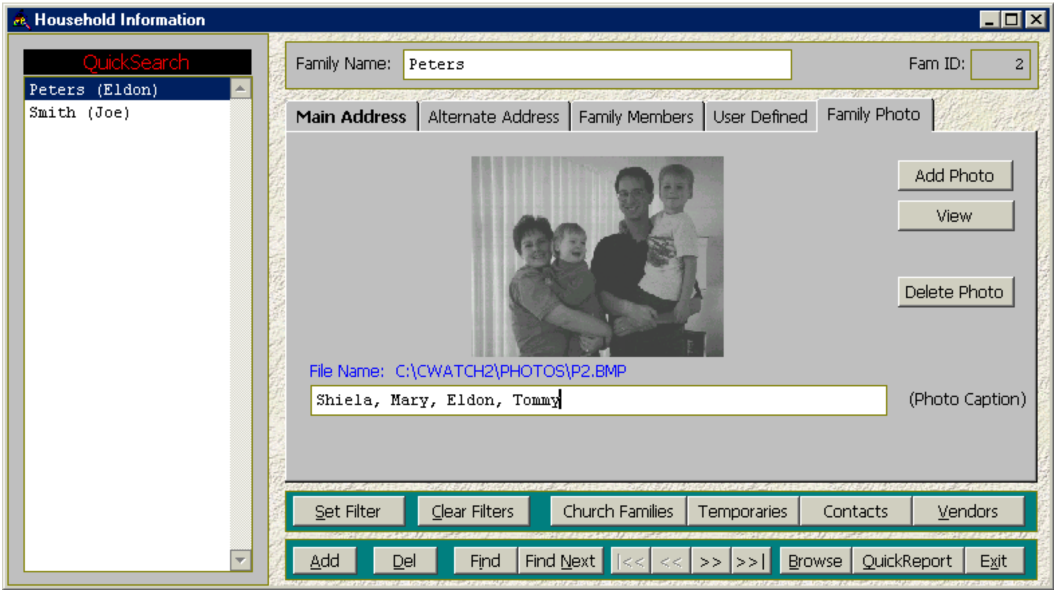


Figure 8-3 Family Photo Controls

Another useful feature of ChurchWatch is the handling of family photos. You can use this feature to create color or black and white photo directories. BMP, JPG and GIF files are allowed. Use the Photo Caption field to enter a caption for the photo. The example in figure 8-3 shows a sample caption entered. The caption will appear in photo directory reports. You can create a church photo directory by using the Report Manager, Directories.

Tip:	*If you find that the use of photos causes performance problems or if you don't intend to use family photos you can turn off the photo display to prevent access. Use the USER PREFERENCES page of the SETUP form - refer to chapter 4.*

Chapter 9 - The People Manager

Keeping Track of Your Greatest Resource - People!

ChurchWatch is capable of storing almost limitless information about the People in or associated with your church through use of the People Manager. The People Manager is organized as a series of pages or file cards with logically grouped information on each page. Refer to figure 9-2 for an example of the People Manager. You can also refer to the same figure throughout this chapter as a reference.

Although the amount of data you can store with the People Manager might seem a bit daunting at first, most data entry fields in the People Manager are optional. Use only what you need. **As a rule you should fill in the first and last name, the gender and the authority fields.** We also recommend setting the title.

Note:	*Before reading this chapter, you should be familiar with the Household Manager discussed in the previous chapter. Every person you add in the People Manager is <u>automatically assigned to the current family</u>. To create a new family with new members use the Household Manager first.*

.

Tip:	*Both the Household and People Managers can be open on your desktop at the same time for data entry convenience.*

Tip:	*You should add at least one person to the Household in the Household Manager before using the People Manager since the People Manager adds people to existing families only.*

Figure 9-1 The People Manager Pages

The People Manager is made up of twelve (12) pages:

Page Title	Description
Main	Personal information such as names, gender, authority, marital status, free form notes.
Church	Information that is church related such as membership level, key dates etc.
Contact	ChurchWatch is capable of storing extensive contact information for a person including several phone numbers, work related information and e-mail addresses. There are also two user defined phone numbers on this page (or any other form of information you might want to store).
T&T	T&T stands for Time and Talents. This page is a summary of each persons ministry skills, general skills, spiritual gifts, interests, hobbies etc.
Giving	The Giving page is a summary of a person's giving and pledges year-to-date. The page is viewable only if you have been given giving access privileges and the information is read-only. This is also where you assign an envelope number.
Groups	This page is a summary of all church groups the current person belongs to.
Attend.	This page gives an attendance summary for the current person. You cannot enter data on this page.
Needs	This page is a summary of all special needs the current person has.
User	If you need to store a specific item of interest and ChurchWatch does not provide a field, you can create several user defined fields. The User Def. page is where you would enter your user-defined data. You can also set the field titles in the SETUP form on the USER DEFINED FIELDS - PEOPLE page.
Notes	This page holds confidential pastor's and Class notes for the current person. You must have access privileges to be allowed to view this page.
Classes	This page contains summary information pertaining to classes. The information here is quite extensive but most of it must be modified in the Sunday School/Class Manager, not here.
Photo	Use this page to specify and view a photo file for the current person.

Table 9-1 People Manager Page Summary

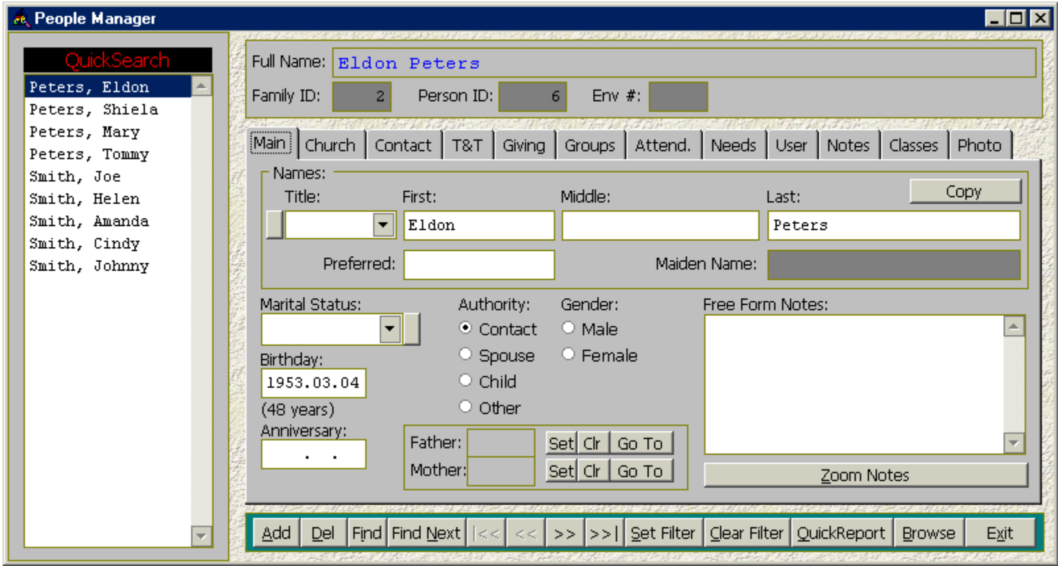


Figure 9-2 The People Manager

Family ID and Person ID

These fields are used internally by ChurchWatch and cannot be modified.

Full Name

You can tell who the current person is that you are editing by looking at the top of the People Form. The full name of the individual is always displayed here. In the example shown in figure 9-2 the current person's name is "Eldon Peters".

Main Page

This page contains general personal information about the current individual. This is the only page that contains information that you must enter - specifically the name, gender and authority fields. We also recommend that you enter the title field but it is optional.

The COPY button inside the Names box is used to copy the full name and address of the current person to the Windows clipboard. You can then "paste" the information into any other Windows application such as word processors, spreadsheets etc. As an example, we have used the COPY button to copy the information from figure 9-2 above into this User's Guide:

Eldon Peters
123 Any Street
Anytown, SK

If you enter a birthday or anniversary date, ChurchWatch will automatically calculate the age or years married and print this information under the field. ChurchWatch always uses 4 digit years and is Year 2000 compliant. If you don't know the year or the individual doesn't want it stored, enter "1111" as the year.

The Free Form Notes box is used to enter any textual information or notes you desire. The ZOOM NOTES button directly below the notes is used to open an edit window and give you more room to work on the notes.

You can also track family history and family trees by setting the Father and/or Mother fields on this page. Use the SET buttons to set the Father or Mother or the CLR buttons to clear the field. Use the GO TO button to go to the Father's or Mother's record. The data displayed in the Father and Mother fields is the person ID of the Father or Mother respectively.

Defining Titles and Marital Status Types

To keep ChurchWatch as flexible as possible, we have allowed you to enter your own titles and marital status types. You can find more information about this in chapter 6. To access the defined titles or to create a new one, click the button to the immediate left of the title box. To create a new marital status or view the existing list, click on the button to the immediate right of the marital status box.

Church Page (Key Dates, Visitations and Prospects)

The Church page contains all information specific to the church. This includes key dates such as baptism, confirmation, commitment etc. You can create your own key date names by clicking the EDIT DATE NAMES button. You can enter or modify the actual dates directly on this page.

You can use this page to set a person's membership level. Click the EDIT LIST button to edit the list of membership types available.

You can also indicate if a person is a prospect by checking the prospect box. There are also reports in the Report Manager pertaining to prospect tracking.

Visitations can be easily tracked on this page and there are visitation reports in the Report Manager. The "Visited By" field is a free form field where you can put the name of the person who visited, usually the pastor's first name.

Contact Page (Contact and Work Related Information)

Use this page to enter extensive contact information for the individual including phone numbers, work related information, e-mail addresses and personal web page.

There are also two (2) user defined phone numbers on this page. You can set the titles for these fields in the SETUP form on the USER DEFINED FIELDS - PEOPLE page. Each field contains 30 characters and can actually be set to anything you want, not just phone numbers.

This page also contains a sample mailing label with address and phone numbers for convenience so that you can view a person's address and household phone numbers without flipping back and forth to the Household Manager.

T&T (Time and Talents) Page

The Time and Talents (T&T) page is a summary of an individual's ministry skills, general skills, spiritual gifts, interests, hobbies etc. To add a Time and Talent to a person, select an item from the list at the left and move it to the list at the right using the right facing arrow button. Similarly you can remove a Time and Talent from a person by selecting one from the list at the right and then clicking the left facing arrow button. To modify the list of available Time and Talents click the TIME AND TALENT EDITOR button on this page.

Giving Page

The Giving page is viewable only if you have been given access to the Giving Manager and tables. The Giving page gives a summary of a person's giving and pledging year-to-date. Note that the data in the table cannot be modified on this page. If there is more data than can be shown on one page you can use the scroll bar to scroll down or click the BROWSE button under the table to open a spreadsheet style window.

Envelope Numbers

Envelope numbers are optional but if you want to use them they can be assigned or set on the Giving page. You have the choice of either entering the envelope number yourself or clicking the ASSIGN NEXT AVAILABLE # button to have ChurchWatch select a number for you. Envelope numbers are numeric and cannot contain letters. You should note that envelope numbers are completely optional in ChurchWatch. If you prefer, you can use the person's name when entering giving data in the Giving Manager.

Groups Page

The Groups page is a summary of groups an individual belongs to. This is an excellent way to track small groups, cell groups, church board members etc. To add the person to a group, select a group from the list at the left and move it to the list at the right using the right facing arrow button. Similarly you can remove the person from a group by selecting a group from the list at the right and then clicking the left facing arrow button. To modify the list of available groups click the GROUP EDITOR button on this page.

Attend. Page

The Attendance page is a read-only page that gives a summary of a person's schedule and past attendance history for both church events and Sunday school. The list at the left, labeled "Schedule", is a list of the church events the person is required at, Sunday school classes the person is enrolled in, and classes the person is teaching (rows shown in light blue indicate a class the person is teaching). The list at the right, labeled "Attendance History", is a list of all events and classes that the current person has attended in the past.

Needs Page

The Needs page is a summary of an individual's special needs such as allergies and disabilities. To add a special need to a person, select an item from the list at the left and move it to the list at the right using the right facing arrow button. Similarly you can remove a special need from a person by selecting one from the list at the right and then clicking the left facing arrow button. To modify the list of available needs click the NEED EDITOR button on this page.

User Def. Page

In keeping with the flexible design of ChurchWatch, this page contains a block of user defined data entry fields. You can make these fields anything you want. The titles for these fields can be set on the SETUP form under the page USER DEFINED FIELDS - PEOPLE. Table 9-2 lists the data types and lengths of each of the user defined fields.

Field Name	Type	Length	Decimals
Character #1	alphanumeric (text and numbers)	30	
Character #2	alphanumeric (text and numbers)	30	
Character #3	alphanumeric (text and numbers)	30	
Character #4	alphanumeric (text and numbers)	30	
Character #5	alphanumeric (text and numbers)	30	
Character #6	alphanumeric (text and numbers)	30	
Checkbox #1	logical (true/false)		
Checkbox #2	logical (true/false)		
Checkbox #3	logical (true/false)		
Numeric #1	numeric	7	0
Numeric #2	numeric	7	0

Field Name	Type	Length	Decimals
Numeric #3	numeric	7	2

Table 9-2 User Defined Fields, People Manager

Notes Page.

This page contains Pastor's confidential notes and Class notes. This page is treated as confidential and only those users who have been given access rights to the page are allowed to view it. Each edit window contains free form notes and may contain any text. There is no limit to the amount of text you can enter.

If the edit window is grey in color it indicates that you have not created a note pad for this person. Click the appropriate CREATE NOTES button to open a notepad. When a note pad has been created the window will be shown in white. Whenever the window is white you can type text directly into the window. To expand the window for easier editing click the appropriate ZOOM NOTES button.

Use DELETE NOTES to delete the notes.

Classes Page

The Classes page contains all class related information for an individual. There is a list for each of:

- Current Classes - all classes the current individual is enrolled in
- Classes Achieved - all classes the current individual has graduated from
- Special Awards - all awards the individual has acquired
- Classes Taught - all classes the current individual has taught or is teaching

There are also several buttons on this page. To delete an achieved class, first select one from the list and then click the DELETE SELECTED button.

The ADD, EDIT and DELETE buttons perform operations on the Special Awards list. The ADD button adds a special award to the current individual. The EDIT button displays the Special Awards list so you can add or remove special award names. The DELETE button deletes the selected award from the current individual.

You can delete a class taught by selecting one and then clicking the DELETE SELECTED button under the list.

Photo Page

The Another useful feature of ChurchWatch is the handling of personal photos. The Personal Profile report includes a color or black and white photo if you have one entered. BMP, JPG and GIF files are allowed. To add a photo click the ADD button. Select the photo file that contains the photo for the current individual. Click the DELETE button to delete the photo or click the VIEW button to view a larger copy of the photo. The view window can be resized as needed.

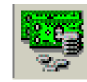
Tip:	*If you find that the use of photos causes performance problems or if you don't intend to use personal photos you can turn off access to the photo display in the USER PREFERENCES page of the SETUP form - refer to chapter 4.*

The Form Buttons

Table 9-3 lists all form buttons not already explained:

Button Title	Description
Add	Click the ADD button to create a new person in the current family. ***Important:*** *A new name is ALWAYS added to the current household or family. You should add at least one name to a household using the Household Manager at the time the household is created to make operations in the People Manager easier.*
Del	Click the DEL button to delete the current person. If the person has made giving contributions, ChurchWatch will not permit you to delete the record.
Find	Click the FIND button to find a person by last name. When doing a find, only the first few letters of the last name of interest need to be entered. The find will locate and show the **first occurrence** of the last name you entered.
Find Next	Repeats the last find. This is handy if you have more than one person with the same last name since the FIND button will only find the first occurrence.
|<<	Click this to go to the first person in the People Manager.
<<	Click this to go back one person.
>>	Click this to go forward one person.
>>|	Click this to go to the last person in the People Manager.
Set Filter	Click this button to set a data filter. Refer to chapter 26.
Clear Filter	Click this button to clear the current data filter.
QuickReport	Click this to get a quick report of all people in the current data filter or if no filter is in effect, all people.
Browse	Click this to view all people in a spreadsheet format.
Exit	Click this to exit the People Manager.

Table 9-3 People Manager Button Summary



Chapter 10 - The Giving and Tax Receipt Managers

ChurchWatch comes complete with a sophisticated Giving Manager for keeping track of contributions and a Tax Receipt Manager for creating tax receipts and IRS reports at tax time.

The Giving Manager

This section describes the Giving Manager form.

Setting Up

Before using the Giving Manager you must review some of the setups on the SETUP form. As well, you will need to create your giving accounts. Figure 10-1 shows the Giving page of the SETUP form and Table 10-2 explains the fields on this page.

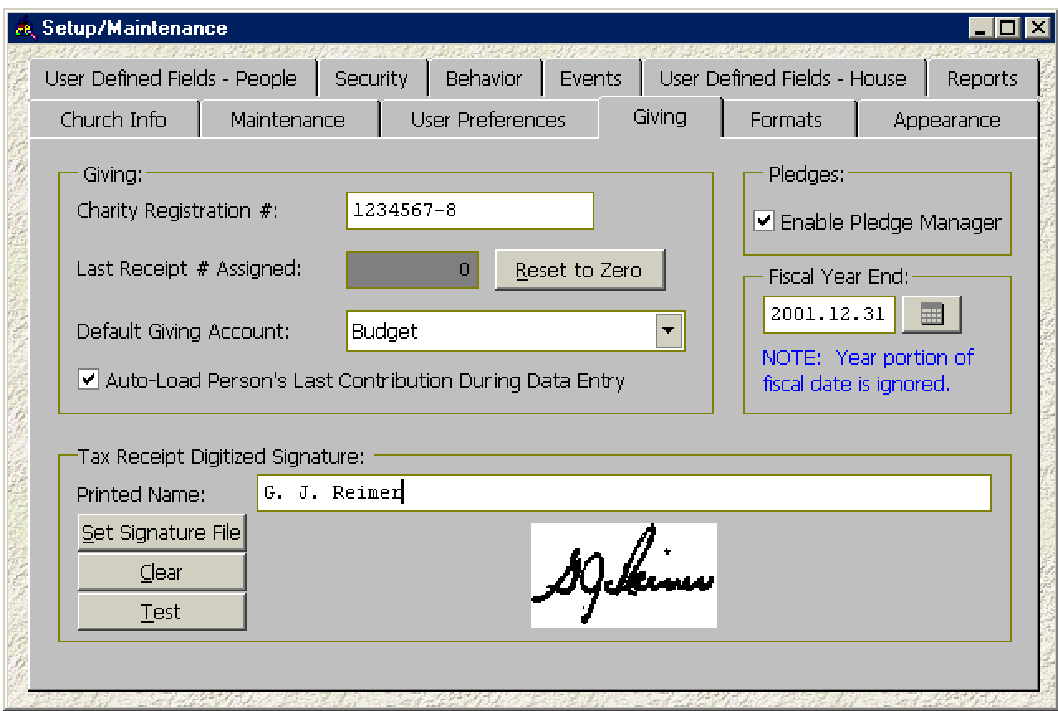


Figure 10-1 Giving Setups

Field Name	Description
Charity Registration #	Charitable organizations such as churches need to be registered with the Government's tax department in most countries. Your tax department will assign a charity registration #. Enter it here for use on tax receipts and reports.
Last Receipt # Assigned	Tax receipting is covered in detail later in this chapter. This is the last tax receipt number that was assigned. You can reset the number to zero by pressing the RESET TO ZERO button but this should only be done before any receipts are issued if at all. Resetting after receipts have been issued in the current year will cause duplicate receipt numbers if you generate any further receipts in the current year. Resetting this number AFTER archiving giving data at year end is permitted.
Default Giving Account	To speed up data entry, set a default giving account here. This account will always be auto selected by default when adding giving or pledge records. You will need to create giving accounts first - refer to the next section.
Auto Load Person's Last Contribution	When this box is checked, the Giving Manager will search for and automatically enter a person's last giving amount and account when you select the person or envelope number. This behavior can help speed up data entry for people who tithe or give the same amount regularly.
Enable Pledge Manager	If you will be tracking pledges, check this box. The Pledge Manager is described in chapter 11.
Fiscal Year End	ChurchWatch includes several fiscal year end reports. Enter the fiscal year end here. Note that the year is unimportant and is not used.
Printed Name	This is the printed name that matches the digitized signature. It will appear under the signature on tax receipts and reports.
Digitized Signature	To reduce your work load at tax time, you may enter a digitized signature file. The digitized signature is used on tax receipts and tax reports. The signature file must be a BMP, JPG or GIF graphics file. Click the SET SIGNATURE FILE button to select the signature file. Click the CLEAR button to remove the signature file. Click the TEST button to view a sample tax receipt with your signature. We recommend testing your signature before printing any receipts. ***Tip:*** *Use a thick dark felt marker to create your signature. Then scan it into a .BMP, .GIF or .JPG file.*

Table 10-1 Giving Setups

Currency Symbol

You can also set the currency symbol used by ChurchWatch on the FORMATS page of the SETUP form. The default symbol is “$”.

Giving Accounts

You will need to plan and setup your giving accounts before entering giving or pledge records. Refer to Chapter 6 for information on creating and maintaining giving accounts.

Starting the Giving Manager

Select the Giving Manager from any of the menus. If the Pledge Manager is enabled you will be given a choice of working with contributions or pledges as shown in figure 10-2. If the Pledge Manager is not enabled the Giving Manager is shown automatically.

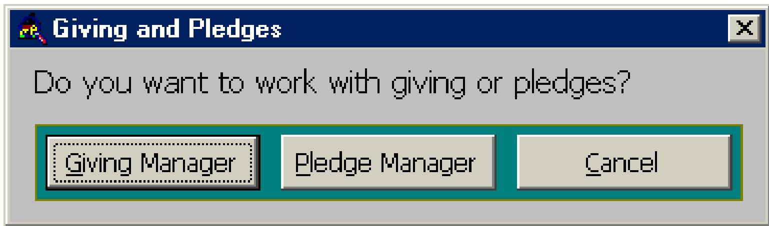


Figure 10-2 Starting the Giving Manager

How Offerings are Grouped

An "offering" is defined by ChurchWatch as any amount(s) given on one particular date. This is an important concept to understand for USA customers. For tax reporting purposes, offerings >= $250 must be substantiated. In the rare case where two or more offerings are given on the same day by one person, they will be treated as a single offering. If the total amount for the day is >= $250 it will appear on the Substantiation of Contributions Report.

A Word or Two About Envelope Numbers

Envelope numbers are optional in ChurchWatch. You can enter offerings by envelope number or by name. Tax receipts are issued to single persons, not families or even envelope numbers (although spouse name can optionally be shown on the receipt also). The same envelope number can be assigned to more than one person <u>in the same family</u>. If you use the envelope number when entering the giving data, and if the envelope number is shared by more than one person in the family, the offering will always be credited to the main contact of the household. This is of no consequence, at least in Canada, since either the husband or wife can claim the receipt regardless of who's name appears on it. The exception to this would be if a child in the family (or any person who is not the husband or wife) shared the same envelope number. Again, the offering would be credited to the main contact of the house. You need to understand these concepts if you decide to use envelope numbers.

Batches

In ChurchWatch, giving records are entered in sessions or "batches". Before entering records you must create a batch date. Each record entered from that point on will contain the current batch date as the date given. The batch date should be set to the date that the offerings were collected. To create a batch, click the NEW button under Batch Control. To edit an existing batch date click the EDIT button. The form in figure 10-3 will be displayed.

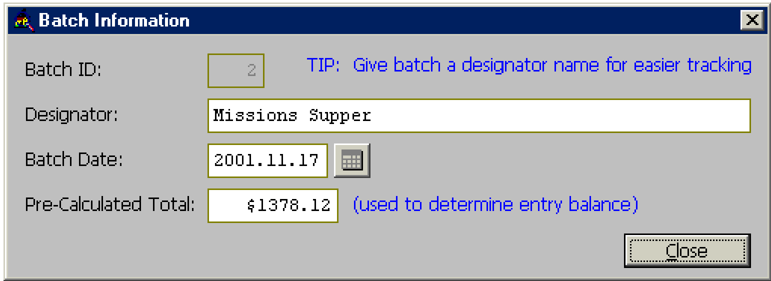


Figure 10-3 Creating or Editing a Batch Date

In this form you can set the batch date and optionally enter a designator name and a pre-calculated batch total. The Designator name is optional but is a handy way to quickly find important batches. The pre-calculated total is also optional but is a handy way to make sure that the data entry balances to the actual teller sheet or known collected totals.

The Giving Manager Form

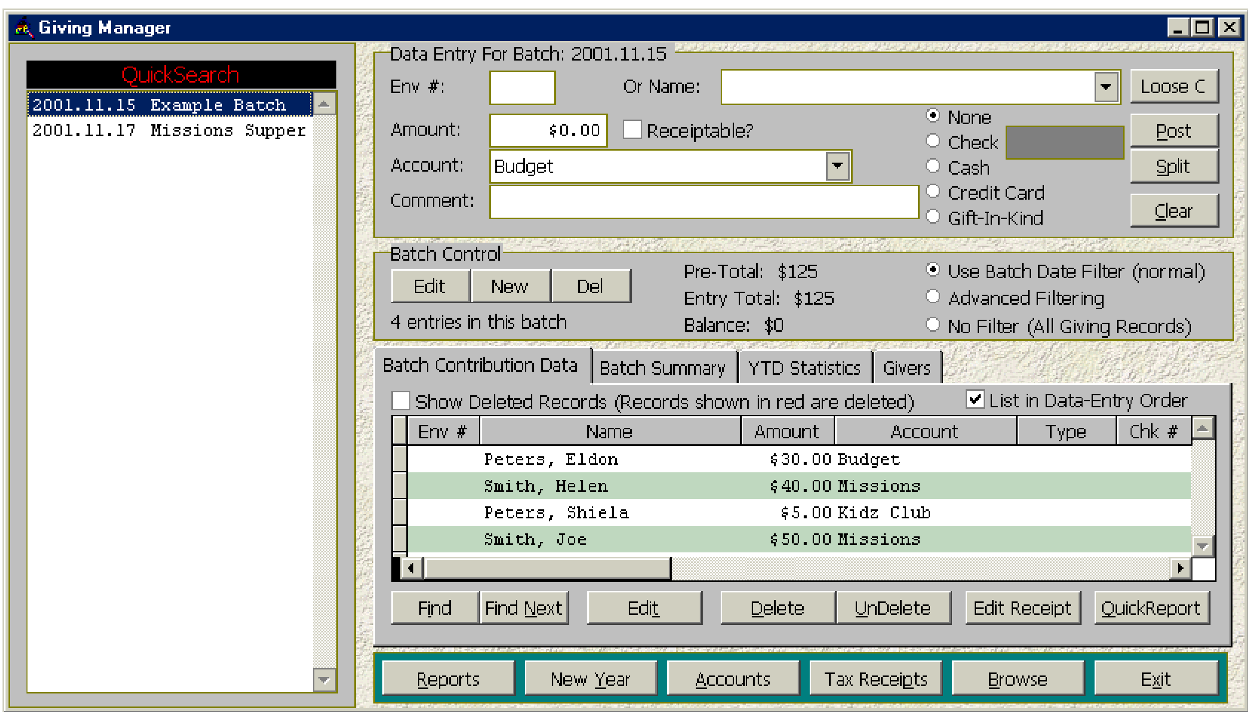


Figure 10-4 The Giving Manager Form

Data Entry Area

The boxed area at the top of the Giving Manager form is used for posting new offerings or editing existing records only. When the background color of this boxed area is grey, you will be posting new data. When the background color is green, it indicates that an existing record has been loaded for modification (this will be explained later). Table 10-2 examines each item in this box in detail.

Form Item	Description
Env #	If you are using envelope numbers you can start data entry by entering the envelope number here. The person name will automatically be filled in. Check it to make sure you have the correct envelope number.
Or Name	You can also directly enter a name instead of an envelope number in this box. If the person has an envelope number assigned, the envelope number will be automatically filled in.
Amount	Enter the amount of the offering here.
Account	In this field, enter the name of the giving account the funds are to be directed to.
Receiptable	The receiptable status of the account can be overridden for this ONE RECORD ONLY by checking or unchecking this box. It is automatically filled in when the account is selected.
Comment	A comment can be entered in this field.
Type	Use of the type “radio” buttons is optional. Set the type of transaction here - None (not used), Check, Cash, Credit Card, Gift-In-Kind.
Check Number	If a check was given you can record the check number in this field.
BUTTONS	
Loose C	Loose Cash button. For loose cash entries, click this button first to have the name and envelope numbers filled in. Envelope #0 is reserved for loose cash.
Post	Click this button to POST (save) your data entry. All fields will be checked before posting and you will be warned of any errors.
Split	This button is used for split offerings. Split offerings occur when a single offering is to be split up and directed to several accounts. Click this button to POST the current data entry and to leave the envelope number and name filled in. The cursor will be positioned in the amount field ready for the next amount from the current offering.
Clear	Click this button to clear all data entry fields.

Table 10-2 Data Entry Area Items

Batch Control Area

The boxed area at the middle of the Giving Manager form is used to create and maintain batch information. There is also batch statistical information shown in this box as well as a set of filtering buttons.

Form Item	Description
Edit	Click this button to edit the name, date and pre-calculated total of the currently selected batch.
New	Click this button to create a new batch.
Del	Click this button to delete a batch and all contribution data entered in this batch.
Statistics	The number of entries in the batch, the pre-total, entry total and balance are printed within this box.
Filter	You can view data from the current batch (default) or all batches using the filter buttons. You can also set a custom filter (refer to chapter 26). The “View By Person” form present in ChurchWatch version 1 has been removed in favor of the filtering method. To view contribution data for a single person, set a custom filter on the envelope number or person ID of interest.

Table 10-3 Batch Control Area Items

Giving Manager Main Pages

Table 10-4 explains the form items and buttons on each of the Giving Manager page tabs.

Field Name	Description
PAGE 1	
Show Deleted Records	Check this box to show deleted records in the table grid. Delete records are shown in red. Used primarily to undelete records. Note that once the data is PACKED in SETUP-MAINTENANCE the deleted records are physically removed and cannot be recalled.
List In Data Entry Order	You can change the sort order of the table grid by clicking on a column header. However, for giving batches this is normally not convenient for comparing data entries to a teller sheet. Check this box to list in data entry order.
Table Grid	Giving records are shown in this table. The records shown are controlled by the current filter which is by default the current batch.
Find	Click this button to find a specific record. An important thing to note is that only records within the current filter (those shown in the table grid) will be searched. Only the first occurrence matching the search conditions is found
Find Next	Click this button to repeat the last find and find the next occurrence.
Edit	Click this button to edit the selected record in the table grid. The Data Entry area will turn green when editing an existing record. If you change you mind about editing the record, click the CLEAR button. You can also double click a record to edit it.

Field Name	Description
Delete	Click this button to delete the currently selected giving record.
Undelete	Select a red deleted record and click this button to undelete it.
Edit Receipt	Click this button to launch the Receipt Editor. Refer to information later in this chapter.
QuickReport	Click this to get a quick report of all giving records shown in the table grid.
PAGE 2	
Table Grid	Shows a distribution summary for the current batch.
PAGE 3	
Table Grid	Shows year-to-date statistics for each defined batch. Red records indicate non-zero balances.
PAGE 4	
Table Grid	Shows a list of all givers in descending order of giving totals.

Table 10-4 Giving Manager Main Page Items

Form Buttons

Table 10-5 explains the form buttons.

Button	Description
Reports	Click this button to open the Report Manager, Giving reports.
New Year	Click this button to start a new giving year. This will allow you to archive all Giving, Household and People data. This will also delete all giving records in the Giving table to prepare for the new year's data entry. Refer to the section titled **Preparing for a New Year - Giving Archive**.
Accounts	Click this button to open the Giving Account editor to edit or define new accounts.
Tax Receipts	Click this to use the Tax Receipt Manager for creating tax receipts or Substantiation of Contribution reports. Refer to chapter 11.
Browse	Click this to view Giving records in a spreadsheet format. The records shown depend on the current filter (by default the filter is the current batch date).
Exit	Click this to exit the Giving Manager.

Table 10-5 Giving Manager Buttons

Adding (POSTing) New Records

To add giving records, begin by creating a new batch date (or by selecting an existing batch). Next enter data in the Data Entry Area at the top of the form. When satisfied with the entry click POST or SPLIT to post the data. Use SPLIT only if the offering is to be split among several giving accounts. When you POST or SPLIT an entry, a record will be added to the table grid on the tab labeled “Batch Contribution Data”.

Faster Data Entry

When you begin adding your first giving records you may find that the process is a bit awkward and slow. The trick to making the data entry go faster is to avoid using the mouse. Practice these steps and you will soon become quite proficient at data entry. We’ll assume that the cursor is already located in the envelope number or name field:

Step 1	Enter an envelope number or name. Press the TAB key. If you entered an envelope number you will need to confirm the name and then press TAB again.
Step 2	Enter the amount to post. Press the TAB key.
Step 3	The cursor is now on the receiptable field. If you wish to change it press the SPACE bar. Then press the TAB key.
Step 4	You are now positioned in the account field. If the account selected is correct, just press the TAB key. Otherwise type the first few letters of the account name until you find the account you need. Press the TAB key.
Step 5	If you wish to enter a comment do it now. Otherwise press the TAB key again.
Step 6	To enter a transaction type use the DOWN ARROW key, then press the SPACE bar to select. Press the TAB key.
Step 7	If you selected “check” you are now in the check number field. Enter the check number and press the TAB key. If you did not select “check” move to step 8.
Step 8	Press the ENTER key to “press” the POST button or press TAB and ENTER to “press” the SPLIT button.

Editing Existing Records

To edit a giving record, double click on it in the table grid. You can also select the record and click the EDIT button. In either case, the record’s data will be loaded into the data entry area and the data entry area will turn green. Modify the data and then click the POST button. To cancel the edit click the CLEAR button.

Preparing for a New Year - Giving Archive

ChurchWatch works on a tax year of January 1 to December 31. After December 31 you will not be permitted to enter new records for the new year since Giving years cannot be mixed (you can still enter records for the past year). Once your tax obligations are complete and you are ready to start a new year, the giving data needs to be archived. Archiving also gives you an opportunity to delete all temporary household and people records and removes all giving data so that you are ready for the new year. Be sure to do a backup before archiving the giving data.

The process is simple and is described in the following paragraphs.

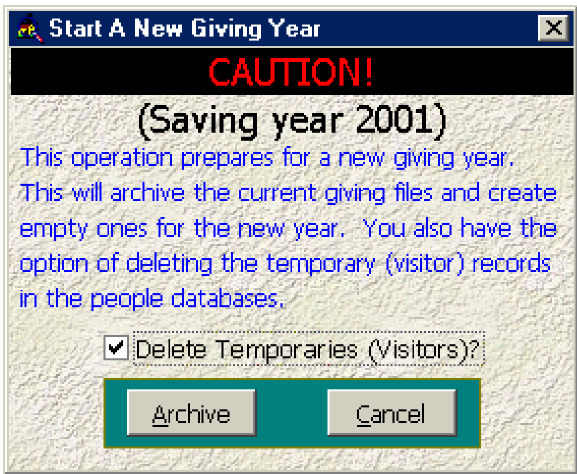


Figure 10-5 Archiving Form

Note:	*Archived data is stored in the ARCHIVE folder under the ChurchWatch folder.*

Important:	*Be sure to do a backup first since the Archive process affects many ChurchWatch tables.*

Step 1	Do a backup first.
Step 2	Click the NEW YEAR button in the Giving Manager. The form shown in figure 10-5 will be displayed.
Step 3	Recall from chapter 8 that the Household Manager has a type field that allows you to indicate if a family is temporarily entered for giving purposes only (see figure 10-6). Check the "Delete Temporaries (Visitors)?" checkbox on the Archive form if you wish to purge all temporary families from the Household and People Managers. You can also wait until another year if you so wish.

Figure 10-6

Step 4	Finally, click the ARCHIVE button to complete the archive. You are now ready to being entering the current year's giving and pledge data.

Using Data From Previous Years

To view and edit data from archived giving years, simply use the year pull-down box on the ChurchWatch Data Context toolbar.

The Tax Receipt Editor

The Tax Receipt Editor gives you a much better view and control of the offering amounts included on any given tax receipt. There are also some simple operations you can perform.

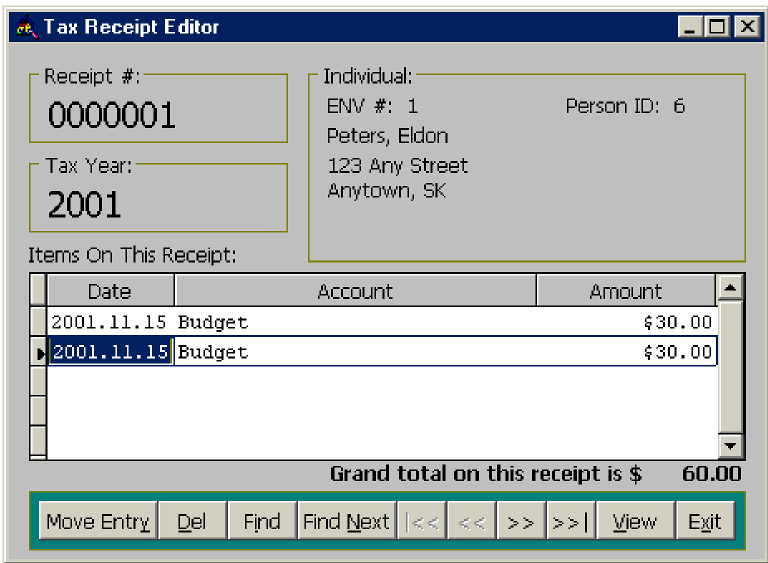


Figure 10-7 The Tax Receipt Editor

To display the Tax Receipt Editor, click the EDIT RECEIPT button on the Giving Manager form or the RECEIPT EDITOR button on the Tax Receipt Manager form.

Table 10-6 lists and explains the items and buttons on the form.

Form Item	Description
Receipt #	The serial number of the current receipt you are viewing is displayed in this box.
Tax Year	The tax year the receipt is from is displayed in this box.
Individual	This box shows the name, address and envelope number (if assigned) of the person the receipt was issued to.
Items On This Receipt	This table shows the date, account and amount of each contribution that was included on the current receipt.
Move Entry	Click this button to move an offering from one receipt to another. This is useful to correct data entry errors after receipts are generated.
Del	Click this button to delete the current tax receipt. This will cause ChurchWatch to clear the tax receipt number from each of the contribution records listed in the table. No giving data is actually deleted. Deleting a receipt is of questionable use unless you have not given a hard copy of the receipt to the individual listed. If you have, deleting a receipt is obviously not recommended and will have implications with your government's tax office!
Find	Click the FIND button to find a person by family name or envelope number or to find a specific receipt number. This will find the first matching record. Use FIND NEXT to search again.
Find Next	Click this button to repeat the last find.
|<<	Click this button to go to the first receipt number.
<<	Click this button to go back one receipt number.
>>	Click this button to go forward one receipt number.
>>|	Click this button to go to the last receipt number.
View	Click the VIEW button to view the tax receipt on screen.
Exit	Click this button to exit the Tax Receipt Editor.

Table 10-6 Tax Receipt Editor Form Items

The Tax Receipt Manager

The Tax Receipt Manager is an excellent tool for streamlining end of the year tax preparations. There are two main uses:

12. **Tax Receipts**. Tax receipts are used mainly in Canada for the reporting of charitable donations to the Canada Customs and Revenue Agency but can be used in other countries as well.
13. **Substantiation of Contributions** (hereafter referred to as the S.C. Report). This report is intended mainly for the USA to substantiate contributions of $250.00 or more to the IRS.

In addition, the Tax Receipt Manager is capable of printing mailing labels for mailing the tax receipts or S.C. reports.

Two other reports are available:

1. **The Giving Details report**. This report contains all offerings made by each person. You may want to mail this out along with the receipts or S.C. report.
2. **The Tax Year Audit report**. This report is useful after printing tax receipts. It contains a list of all receipt numbers, the amount on the receipt and who the receipt was issued to.

There are also many options available to you such as:

- Set report destination (screen or printer)
- Set person filters (print receipt for one offering, all offerings for the entire year or a custom set)
- Set receipt and report options

Tip: *In addition to printing mailing labels, the Tax Receipts and S.C. report are designed for #10 windowed envelopes when folded twice.*

The Tax Receipt Manager Form

Actions Page

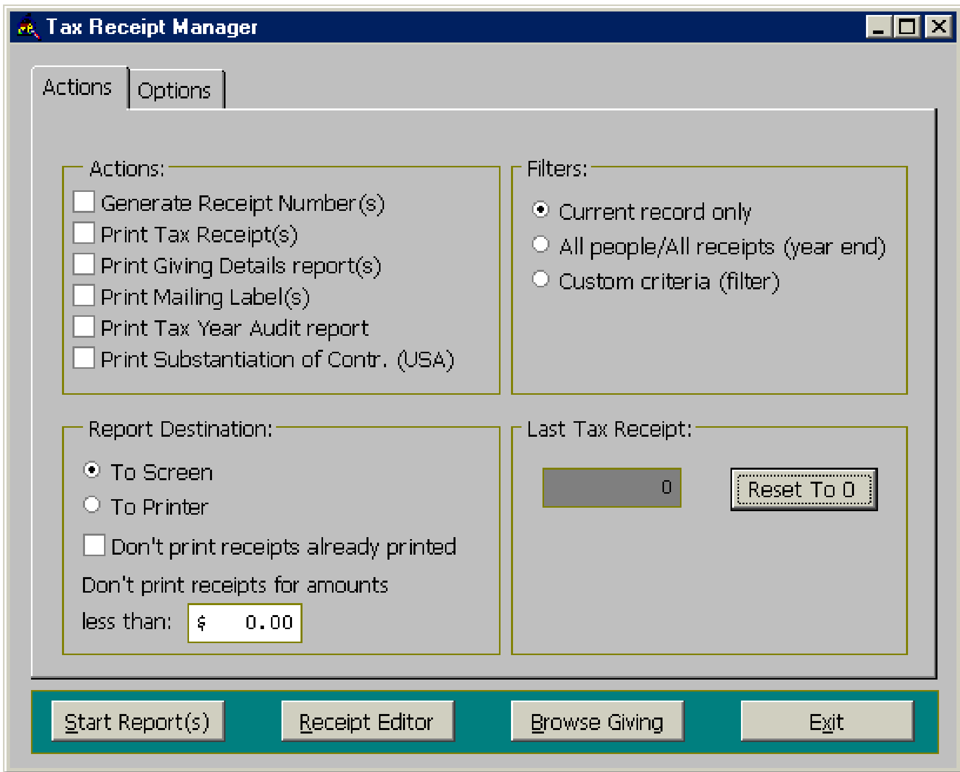


Figure 10-8 Tax Receipt Manager, Actions Page

Form Item	Description
Generate Receipt Numbers	Check this box to generate the serial numbers for receipts. A tax receipt does not exist until it has a serial number.
Print Tax Receipts	Check this box to print the tax receipt(s) to screen or printer.
Print Giving Details Reports	Check this box to produce a giving details report for each person.
Print Mailing Labels	Check this box if you need mailing labels.
Print Tax Year Audit Report	Check this box to print an audit report.
Print Substantiation of Cont. (USA)	Check this box to print the S.C. report.

Form Item	Description
Data Filter Options	You have three choices for which offering(s) are included in the tax preparation: 1. Current Record Only. This will include only the current record showing in the Giving Manager. Using this option you can create an immediate tax receipt for a single offering. If the offering is a split offering you will need to use a custom filter instead to select the person and the date of the offering. 2. All People/All Receipts. Use this for normal year end processing for all offerings. 3. Custom Criteria. Use this to set any data filter of your choice. Refer to chapter 26. ***Tip:*** *Use the BROWSE GIVING button to check the results of your data filter and to see what giving records will be included in the tax receipt or report generation.*
Report Destination	Reports can be sent to the screen or printer.
Don't print receipts already printed	If you are printing hard copy receipts it is not advisable to issue duplicates. Check this box to prevent ChurchWatch from printing tax receipts that have already been printed.
Don't print receipts for amounts less than	Fill this field in to limit generated receipts to amounts greater than this. For example you may not want to issue tax receipts for amounts less than $5. This refers to the receipt total, not individual offerings. So for example, if an individual gave seven $1 contributions, this would exceed the limit and he/she would receive a receipt for $7.
Last Tax Receipt	This field shows the last tax receipt number that was generated. The next receipt generated will carry a serial number of one (1) higher. Use the RESET TO ZERO button to reset the serial numbers if you are sure no other serial numbers exist in the database. ***Warning!*** *If there are tax receipt numbers already generated for the current giving year, resetting the serial number to zero may create duplicate serial numbers. ChurchWatch will warn you before proceeding.*

Table 10-7 Actions Page Items

Options Page

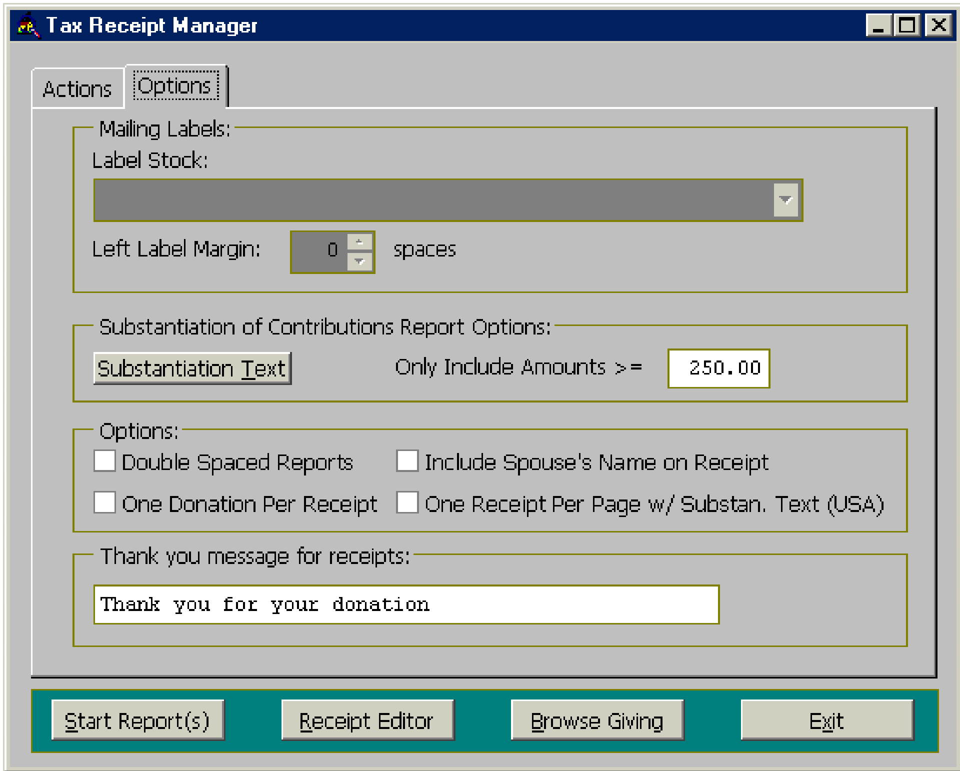


Figure 10-9 Tax Receipt Manager, Options Page

Form Item	Description
Label Stock	If you are printing mailing labels you must choose a label stock. Many different label stocks are supported. If yours is not listed choose one of similar size. If you are printing to printer ChurchWatch will prompt you to load the printer with the label stock.
Left Label Margin	If you would like more margin on the left side of the labels enter a number of spaces in this field.
Substantiation Text	Click this button to edit the text that appears on the Substantiation of Contributions Report.
Only Include Amounts	The Substantiation of Contributions report includes any amount greater or equal to this value. The default is $250.00.
Double Spaced Reports	Check this box for double spaced reports.

Form Item	Description
One Donation Per Receipt	Includes only one donation amount per receipt. This is not particularly useful in a church but is intended mainly for charities that must give a receipt for every transaction.
Include Spouse's Name	Check this box to include a spouse's name on the receipt. For example, "John and Sally Smith" instead of just "John Smith". **IMPORTANT:** When checked, if both persons have made donations, the receipt amounts will NOT be combined into a single receipt. Receipts in ChurchWatch are always attributed to the individual that made the contribution. In this case you will get two receipts both addressed to the couple. If this behavior is not desired, make sure to always attribute contributions to the main contact of the household.
One Receipt Per Page With Substan. Text	Check this box to include only one copy of the receipt per page instead of three copies. When this box is checked, the substantiation text is also added to the receipt if it fits or under the receipt if it does not fit. This is useful mainly for charities.
Thank you message for receipts	Use this field to change the thank you message printed on the tax receipts.

Table 10-8 Option Page Items

Form Buttons

Table 10-9 lists and explains the Tax Receipt Manager form buttons:

Button	Description
Start Reports	Click this button to perform the actions you have selected.
Receipt Editor	Click this button to view the Tax Receipt Editor. Refer to the "Tax Receipt Editor" section above for more information.
Browse Giving	Click this button to view the giving records that will be included in the actions you have selected. Use this button to test your data filter.
Exit	Click this button to exit the Tax Receipt Manager.

Table 10-9 Tax Receipt Manager Buttons

Canadian Tax Receipt Generation

Tax receipts are intended mainly for Canadian churches but may be suitable in other countries as well. ChurchWatch will attempt to place all contributions made by a single individual onto a single tax receipt, depending of course on the data filter you have selected. Once a receipt has been generated, ChurchWatch will not automatically add any further amounts to the receipt since it is assumed the receipt has been issued. If it is absolutely necessary that a tax receipt be modified, you can use the Tax Receipt Editor to modify the receipt or delete the receipt, then use the Tax Receipt Manager to recreate a new one.

Here are some guidelines and tips for creating tax receipts:

1. Before proceeding, make sure your giving data is “clean”. Double check all batch totals using the “Batch Summary #2" report in the Report Manager or the YTD statistics page in the Giving Manager.
2. Do a backup! We cannot stress this point enough. This will allow you to restore the starting state of your database tables if necessary and will allow you to proceed with confidence.
3. Use a digitized signature if possible so that you won’t have to hand sign all the receipts.
4. Remember to set your charity registration number on the GIVING page of the SETUP form.
5. Decide if you will be generating a single tax receipt or all tax receipts for year end and set the data filter accordingly. It’s a common mistake to leave the data filter set to “Current Record Only” at year end.
6. Check the “Generate Receipt Numbers” and the “Print Tax Receipts” checkboxes in the Tax Receipt Manager. Make sure you select the screen as your destination so you can review the receipt(s).
7. If desired, you can change the thank you message printed on the receipt.

Tax receipts are issued to single persons, not families or even envelope numbers. The same envelope number can be assigned to more than one person in the same family. If you use the envelope number when entering the giving data, and if the envelope number is shared by more than one person in the family, the offering will always be credited to the head of the house. This is of no consequence, at least in Canada, since either the husband or wife can claim the receipt regardless of who’s name appears on it. The exception to this would be if a child in the family (or any person who is not the husband or wife) shared the same envelope number. Again, the offering would be credited to the head of the house. You need to understand these concepts when assigning envelope numbers.

***Important**: Only offerings marked receiptable are included on tax receipts.*

USA Substantiation of Contributions Report

The Substantiation of Contributions Report is intended mainly for USA churches but may be suitable in other countries as well. To make this report as flexible as possible you can change the limiting amount which is defaulted to $250 for USA churches. You may want to double check the amount entered on the Options page before generating the report.

The purpose of the report is to satisfy the IRS requirement that all contributions over $250 be substantiated. The definition of an offering or contribution was given earlier in this chapter but we will repeat it here:

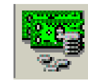
An “offering” is defined by ChurchWatch as any amount(s) given on one particular date. This is an important concept to understand for USA customers. For tax reporting purposes, offerings >= $250 must be substantiated. In the rare case where two or more offerings are given on the same day by one person, they will be treated as a single offering. If the total amount for the day is >= $250 it will appear on the Substantiation of Contributions Report.

***Important**: Only offerings marked receiptable are included on the Substantiation of Contributions report.*

Using Data From Previous Years

You can work on receipt data from previous archived giving years simply by selecting the giving year on the ChurchWatch toolbar. You can even generate receipts in past years.

Chapter 11 - The Pledge Manager



ChurchWatch version 2 adds a sophisticated Pledge Manager for keeping track of pledges towards your giving accounts. The Pledge Manager is very similar to the Giving Manager and we recommend you read and understand Chapter 10 first.

Setting Up

The Pledge Manager must be enabled on the SETUP-GIVING page (refer to figure 10-1). In addition you will need plan and setup your giving accounts before entering giving or pledge records. Refer to Chapter 6 for information on creating and maintaining giving accounts.

Starting the Pledge Manager

Select the Pledge Manager from any of the menus. If the Pledge Manager is enabled you will be given a choice of working with contributions or pledges as shown in figure 11-1. If the Pledge Manager is not enabled the Giving Manager will be displayed instead.

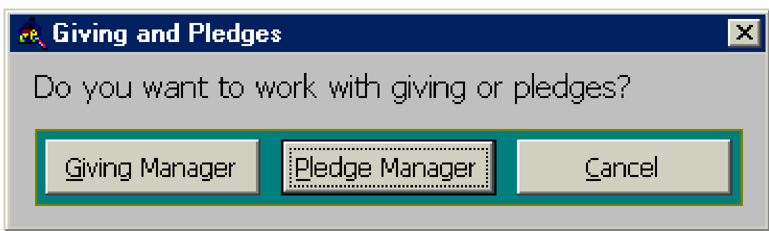


Figure 11-1 Starting the Pledge Manager

The Pledge Manager Form

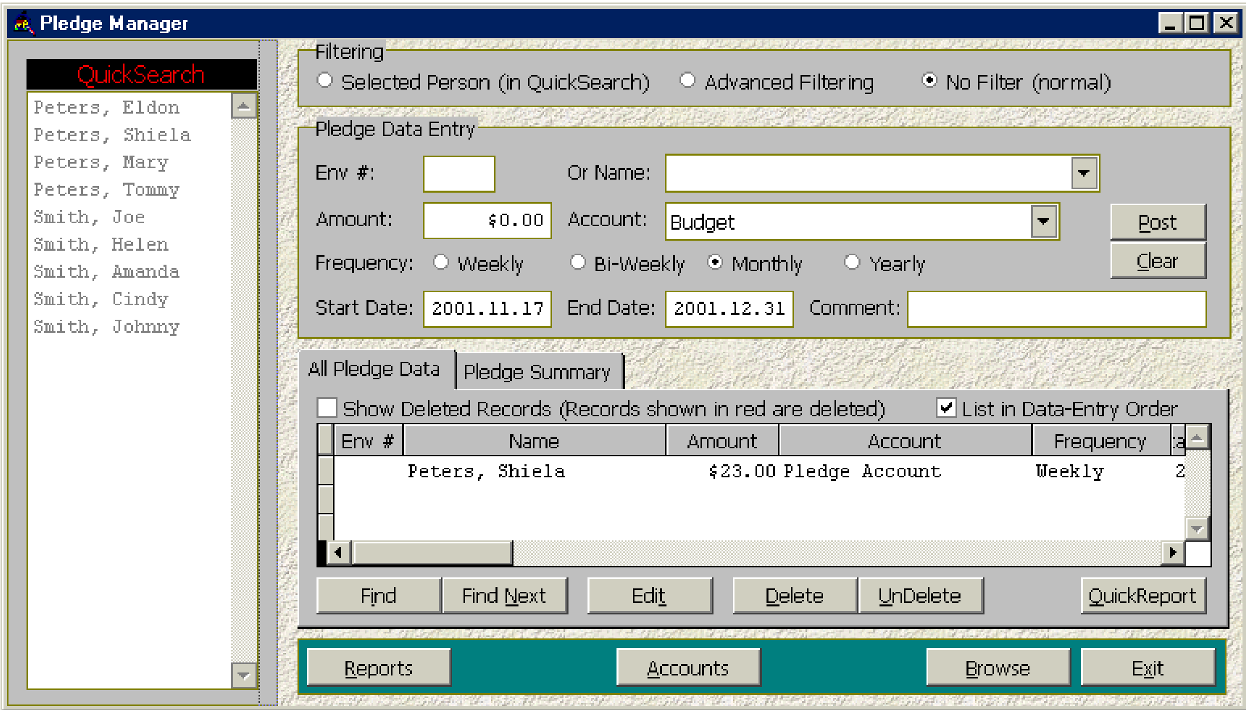


Figure 11-2 The Pledge Manager Form

Filtering

By default the Pledge Manager uses no filtering on your data (all records are shown). You can view the pledges for a single person by clicking the "Selected Person" radio button. Then select a person from the QuickSearch List. The Advanced Filtering radio button can be used to create a more detailed data filter (refer to chapter 26).

Pledge Data Entry

The area below the filtering box is used for posting new pledges or editing existing records. When the background color of this boxed area is grey, you will be posting new data. When the background color is green, it indicates that an existing record has been loaded for modification (this will be explained later). Table 11-1 examines each item in this box in detail.

Form Item	Description
Env #	If you are using envelope numbers you can start data entry by entering the envelope number here. The person name will automatically be filled in. Check it to make sure you have the correct envelope number.

Form Item	Description
Or Name	You can also directly enter a name instead of an envelope number in this box. If the person has an envelope number assigned, the envelope number will be automatically filled in.
Amount	Enter the amount of the pledge here.
Account	In this field, enter the name of the giving account the funds are pledged to.
Frequency	You have a choice of 4 frequencies: Weekly, Bi-Weekly, Monthly and Yearly. Bi-Weekly is every 14 days.
Start Date	Enter the date on which the first contribution will be made. ChurchWatch has many “potential giving” type reports. For most accurate reporting it is important to enter the date of the first contribution rather than the date the pledge was made on. If the first contribution date is unknown use the date of the pledge but recognize that potential giving reports will not be 100% accurate.
End Date	Enter the date when the pledge promise expires.
Comment	A comment can be entered in this field.
BUTTONS	
Post	Click this button to POST (save) your data entry. All fields will be checked before posting and you will be warned of any errors.
Clear	Click this button to clear all data entry fields.

Table 11-1 Data Entry Area Items

Pledge Manager Main Pages

Table 11-2 explains the form items and buttons on each of the Pledge Manager page tabs.

Field Name	Description
PAGE 1	
Show Deleted Records	Check this box to show deleted records in the table grid. Delete records are shown in red. Used primarily to undelete records. Note that once the data is PACKED in SETUP-MAINTENANCE the deleted records are physically removed and cannot be recalled.
List In Data Entry Order	You can change the sort order of the table grid by clicking on a column header. Check this box to list in data entry order.
Table Grid	Pledge records are shown in this table. The records shown are controlled by the current filter which is by default all records.
Find	Click this button to find a specific record. An important thing to note is that only records within the current filter (those shown in the table grid) will be searched. Only the first occurrence matching the search conditions is found
Find Next	Click this button to repeat the last find and find the next occurrence.
Edit	Click this button to edit the selected record in the table grid. The Data Entry area will turn green when editing an existing record. If you change you mind about editing the record, click the CLEAR button.
Delete	Click this button to delete the currently selected record.
Undelete	Select a red deleted record and click this button to undelete it.
QuickReport	Click this to get a quick report of all pledge records shown in the table grid.
PAGE 2	
Table Grid	Shows a simple summary of pledge data. This report does not show potential giving, just a summary of entered pledge data.

Table 11-2 Pledge Manager Main Page Items

Form Buttons

Table 11-3 explains the form buttons.

Button	Description
Reports	Click this button to open the Report Manager, Pledge reports.
Accounts	Click this button to open the Giving Account editor to edit or define new accounts.
Browse	Click this to view Pledge records in a spreadsheet format. The records shown depend on the current filter (by default there is no filter).
Exit	Click this to exit the Pledge Manager.

Table 11-3 Pledge Manager Buttons

Adding (POSTing) New Records

To add pledge records, simply enter data in the Data Entry Area and then click the POST button. The record will be added to the table grid.

Faster Data Entry

When you begin adding your first pledge records you may find that the process is a bit awkward and slow. The trick to making the data entry go faster is to avoid using the mouse. Practice these steps and you will soon become quite proficient at data entry. We'll assume that the cursor is already located in the envelope number or name field:

Step 1	Enter an envelope number or name. Press the TAB key. If you entered an envelope number you will need to confirm the name and then press TAB again.
Step 2	Enter the amount to post. Press the TAB key.
Step 3	You are now positioned in the account field. If the account selected is correct, just press the TAB key. Otherwise type the first few letters of the account name until you find the account you need. Press the TAB key.
Step 4	To enter a frequency use the RIGHT ARROW key, then press the SPACE bar to select. Press the TAB key.
Step 5	Enter a start date and press the TAB key.
Step 6	Enter an end date and press the TAB key.
Step 7	Enter a comment if desired, then press the TAB key, otherwise just press the TAB key.
Step 8	Press the ENTER key to "press" the POST button.

Preparing for a New Year - Pledge Archive

Refer to chapter 10 for information on preparing for a new giving year. In the case of Giving records, all records are archived, then deleted. The Pledge Manager is treated differently. When you archive data, the Pledge Manager table is copied to the archive folder but only those records with expired end dates are deleted. With this method, you can have pledge promises that stretch over several years without having to worry about re-entering any data at year end.

Using Data From Previous Years

To view and edit data from archived pledge years, simply use the year pull-down box on the ChurchWatch Data Context toolbar.

Pledge Reports and Potential Giving

There are many pledge reports available in the Reports Manager. Some of these reports introduce a concept called “potential giving”. These are sophisticated reports that allow you to predict your future giving based on pledge data for any given time period. The reports of course assume that all pledges will be honored in full and on time.

Chapter 12 - The Event Manager

What is an Event?

The Event Manager is a powerful tool used to define church events for the purpose of tracking attendance, tracking the use of church facilities and resources, tracking the schedules of people, printing church calendars and setting up reminders. An event can be anything that happens at your church but should not include Sunday School or other classes as these are handled by the Sunday School/Class Manager in a similar way. Example of church events are:

- Services
- Meetings
- Weddings
- Baptisms
- Funerals

Examples of items that should NOT be placed in the Event Manager are:

- A doctor's appointment
- Evangelism class

It would be better to place the above items in your To-Do list or the Sunday School/Class Manager.

There are a number of event setups available on the SETUP-EVENTS page.

Event Frequency

The Event Manager makes it easy to define recurring events to greatly reduce the number of unique events you will need to create. For example, to track attendance at Sunday Services, you could define an event titled "Sunday AM Service", set the initial date to the next Sunday, and then set it to recur each Sunday thereafter. When it's time to enter attendance, the event of interest will be found in the Attendance Manager without having to enter it again.

Important Concept:	*The Event Manager does not define event occurrences, only event attributes. Actual occurrences of the events (with dates) appear in the Attendance Manager and on calendar and event reports.*

ChurchWatch Today and Event Reminders

The ChurchWatch Today page will list all events scheduled for the current day. You can also set a reminder and ChurchWatch will notify you at the specified time. ChurchWatch must be running for the reminder to occur.

Changing the Date or Recurring Information

When you make a change to the scheduling of an event, ChurchWatch will ask you if you want to delete all occurrences of the event (including attendance that may have been recorded for past occurrences) before recreating the event and any future events (if the event is recurring). Normally you should answer YES to remove false occurrences of the event unless you have some attendance data entered for a past occurrence. ChurchWatch ALWAYS deletes future occurrences of the event before recreating and adjusting the future schedule. Answering NO to the prompt may lead to some confusion since old and possibly incorrect occurrence dates will show up in the Attendance Manager.

The Event Manager Form

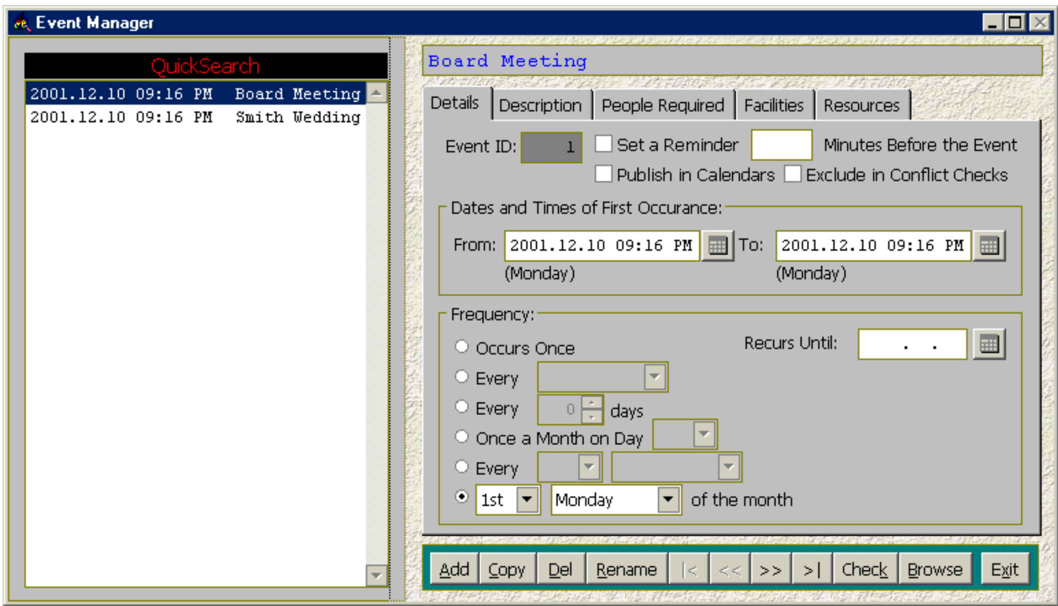


Figure 12-1 Event Manager, Details Page

The Event Manager form consists of a QuickSearch list, a set of pages for defining the event and a set of buttons to manipulate the selected event. The form always works on the event that is selected in the QuickSearch list. The name of the current event also appears in blue near the top of the form. Table 12-1 describes the form buttons and the sections following explain each page in detail.

Button	Description
Add	Click this button to create a new event.
Copy	Click this button to copy an event to a new name. All attributes of the current event are also copied. Saves data entry time.
Rename	Click this button to rename the selected event.
Del	Click this button to delete the selected event, all occurrences and all associated data such as attendance. If you don't want to lose attendance data you simply need to stop this event from recurring any further. Set the recurs until date to todays date.
|<<	Click this to go to the first event.
<<	Click this to go back one event.
>>	Click this to go forward one event.
>>|	Click this to go to the last event.
Check	Click this button to do a manual check for scheduling conflicts.
Browse	Browse event records in spreadsheet form.
Exit	Click this button to exit the Event Manager.

Table 12-1 The Event Manager Buttons

QuickSearch List

Click on an event in the QuickSearch list to make it the current event. If the event of interest is not displayed, click the scroll bar to move the list and view more events. There are a number of options available to you if you right-click on a QuickSearch list item or on the QuickSearch title.

Details Page and Recurring Events

The details page is the main page of the Events Manager. Use this page to set the dates and times for the event. You can specify if you would like a reminder and if the event is to occur more than once and optionally when it stops recurring. Table 12-2 lists the items on the Details page.

Form Item	Description
Event ID	The Event ID is used internally by ChurchWatch and cannot be modified.
Set a Reminder	Check this box if you would like ChurchWatch to remind you before the event occurs. You can also set when you would like the reminder to occur by setting the number of minutes (or hours in minutes) before the event. Note that ChurchWatch must be running in order to receive the reminder.
Publish in Calendars	Check this box to allow the event name, dates and times to appear in church calendars.
Exclude in Conflict Checks	Check this box to exclude all occurrences of this event from schedule conflict checks.
From/To	Set the initial from and to dates and times using these fields. You can also click the CALENDAR button beside each field to display a calendar for more easily selecting a date. You will still need to set the time properly.
Frequency	Use the frequency options to set whether the event occurs only once or recurs several times. There are several sophisticated options available to you here . If you have a more complex event schedule you will need to manually create each event as a one-time occurring event. However, the options available in ChurchWatch will allow you to setup most event schedules that you will encounter.
Recurs Until	If the event stops recurring on a specific date you can set it here. If this is not set, the event will recur forever. You can use this field to stop an event from recurring further without worrying about deleting the event and losing any attendance data.

Table 12-2 Details Page Form Items

Setting Recurring Events “Look-Ahead”

When you define a recurring event or class, ChurchWatch looks ahead a specific number of days to auto-define future events for you. You can set the number of days that ChurchWatch looks ahead on the EVENTS page of the SETUP form. The lower this number the faster ChurchWatch will perform the look ahead and other event based operations and the less data that will be stored on your hard drive. However, if you need to create a calendar for a month that is not included in the look ahead, not all events will appear. Based on this information you will need to decide what is the best look-ahead value for your church.

Description Page

You can enter a description of the event or any other comments on the description page.

People Required Page

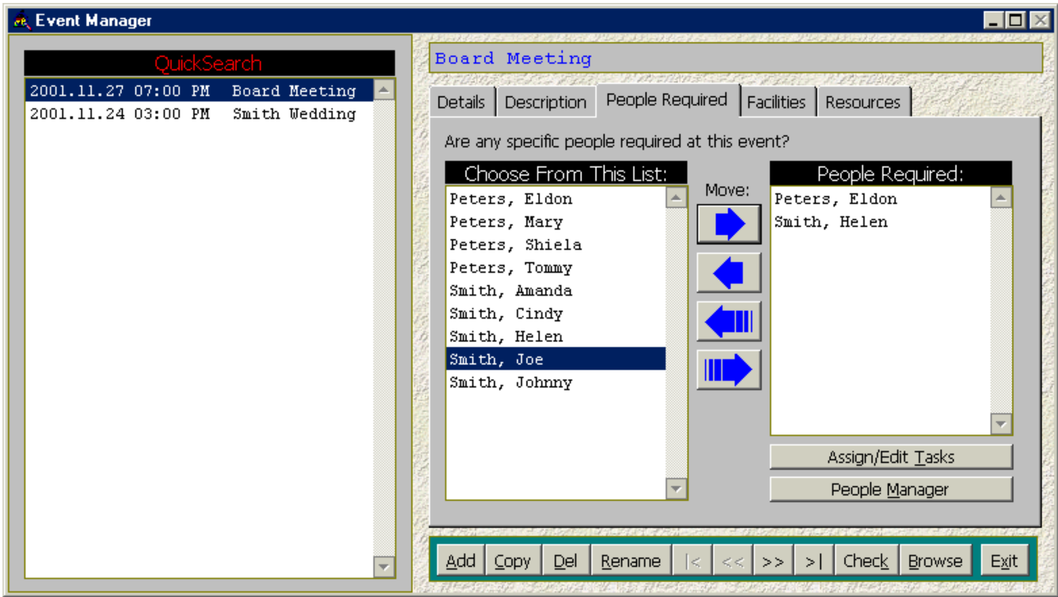


Figure 12-2 Event Manager, People Required Page

The People Required page is provided to record the people required at the event for the purpose of tracking and checking their schedules. Recording people required at the event is optional.

To add a person to the People Required list, select the person from the left list and then click the right facing arrow button. You can also move all people to the required list by clicking the broken right facing arrow button.

To remove a person from the required list, select the person from the right list and then click the left facing arrow button. You can also remove all people from the required list by clicking the broken left facing arrow button.

Assigning and Completing Tasks

Each person required at the event can be assigned a task or set of tasks by clicking the ASSIGN/EDIT TASKS button. You can also mark the task(s) complete on the form that is displayed. Several reports are available that will allow you to track task completion.

Facilities Page

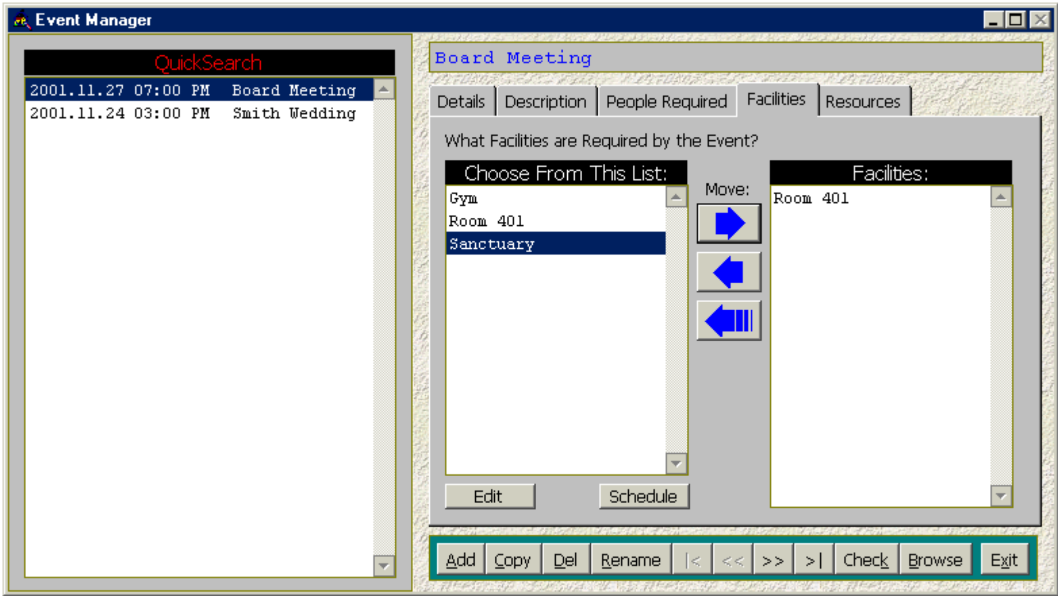


Figure 12-3 Event Manager, Facilities Page

The Facilities page is used to optionally assign facilities to the event. If you have facility and resource checking turned on (on the EVENTS page of the SETUP form), ChurchWatch will check your facility and resource bookings for schedule conflicts whenever an event is created or changed. Note that on slower computers this may be a slow operation. Turn off facility/resource checking to speed up the operation of ChurchWatch when creating or changing events. You can always check for schedule conflicts manually using the button the EVENTS page of the SETUP form.

The arrow buttons work similar to the arrow buttons on the People Required page. The EDIT button will display the Facilities Editor to allow you to create new facilities, change the names, and other operations. The SCHEDULE button will display a schedule for the facility selected in the left list. The schedule is useful to manually determine if a scheduling conflict will be created.

Refer to chapter 4 for information on the SETUP form and chapter 6 for more information on facilities and resources.

Resources Page

The Resources page works in exactly the same manner as the Facilities page.

Church Calendars

Several church calendar formats can be created in the Report Manager, Events.

Chapter 13 - The Sunday School and Class Manager

This Manager is intended for Sunday School or any class, training or education setting. For here on in we'll call it the "Class Manager". The Class Manager looks and works very similar to the Event Manager but it allows you to track:

- Classes in your church
- Class enrollment
- Teachers
- Past teachers
- Facilities and resource bookings for classes
- Promotions and special awards

There are many different types of reports associated with this manager and you can find them in the Report Manager.

Class Frequency

The Class Manager makes it easy to define recurring classes to greatly reduce the number of unique classes you will need to create. For example, to track attendance at the kindergarten class each Sunday morning, you could define a class titled "Sunday AM Kindergarten", set the initial date to the next Sunday and set it to recurring each Sunday. When it's time to enter attendance, the class of interest will be found in the Attendance Manager without having to enter it again.

Important Concept:	*The Class Manager does not define class occurrences, only class attributes. Actual occurrences of the classes (with dates) appear in the Attendance Manager and on class reports.*

Changing the Date or Recurring Information

When you make a change to the scheduling of a class, ChurchWatch will ask you if you want to delete all occurrences of the class (including attendance that may have been recorded for past occurrences) before recreating the class and any future classes (if the class is recurring). Normally you should answer YES to remove false occurrences of the class unless you have some attendance data entered for a past occurrence. ChurchWatch ALWAYS deletes future occurrences of the class before recreating and adjusting the future schedule. Answering NO to the prompt may lead to some confusion since old and possibly incorrect occurrence dates will show up in the Attendance Manager.

The Class Manager Form

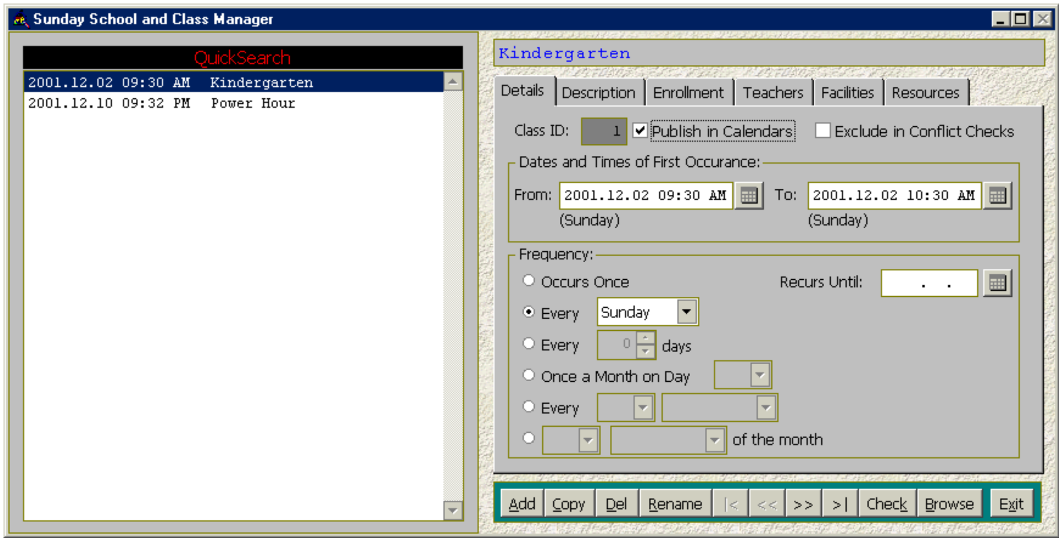


Figure 13-1 Class Manager, Details Page

The Class Manager form consists of a list of classes on the left side, a set of pages for defining the class and a set of buttons to manipulate the selected class. The form always works on the class that is selected in the QuickSearch list. The name of the current class also appears in blue near the top of the form. Table 13-1 describes the form buttons and the sections following explain each page in detail.

Button	Description
Add	Click this button to create a new class.
Copy	Click this button to copy a class to a new name. All attributes of the current class are also copied. Saves data entry time.
Rename	Click this button to rename the selected class.
Del	Click this button to delete the selected class, all occurrences and all associated data such as attendance. If you don't want to lose attendance data you simply need to stop this class from recurring any further. Set the recurs until date to todays date.
|<<	Click this to go to the first class.
<<	Click this to go back one class.
>>	Click this to go forward one class.
>>|	Click this to go to the last class.
Check	Click this button to manually check for scheduling conflicts.
Browse	Browse event records in spreadsheet form.
Exit	Click this button to exit the Class Manager.

Table 13-1 The Class Manager Buttons

QuickSearch List

Click on a class in the QuickSearch list to make it the current class. If the class of interest is not displayed, click the scroll bar to move the list and view more classes. There are a number of options available to you if you right-click on a QuickSearch list item or on the QuickSearch title.

Details Page and Recurring Classes

The details page is the main page of the Class Manager. Use this page to set the dates and times for the class. You can specify if you would like a reminder and if the class is to occur more than once and optionally when it stops recurring. Table 13-2 lists the items on the Details page.

Form Item	Description
Class ID	The Class ID is used internally by ChurchWatch and cannot be modified.
Publish in Calendars	Check this box to allow the class name, dates and times to appear in church calendars.
Exclude in Conflict Checks	Check this box to exclude all occurrences of this class from schedule conflict checks.
From/To	Set the initial from and to dates and times using these fields. You can also click the CALENDAR button beside each field to display a calendar for more easily selecting a date. You will still need to set the time properly.
Frequency	Use the frequency options to set whether the class occurs only once or recurs several times. There are several sophisticated options available to you here . If you have a more complex class schedule you will need to manually create each class as a one-time occurring class. However, the options available in ChurchWatch will allow you to setup most class schedules that you will encounter.
Recurs Until	If the class stops recurring on a specific date you can set it here. If this is not set, the class will recur forever. You can use this field to stop a class from recurring further without worrying about deleting the class and losing any attendance data.

Table 13-2 Details Page Form Items

Setting Recurring Classes "Look-Ahead"

When you define a recurring class, ChurchWatch looks ahead a specific number of days to auto-define future classes for you. You can set the number of days that ChurchWatch looks ahead on the EVENTS page of the SETUP form. The lower this number the faster ChurchWatch will perform the look ahead and other event based operations and the less data that will be stored on your hard drive. However, if you need to create a calendar for a month that is not included in the look ahead, not all events will appear on the calendar. Based on this information you will need to decide what is the best look-ahead value for your church.

Description Page

You can enter a description of the class or any other comments on the description page.

Enrollment Page

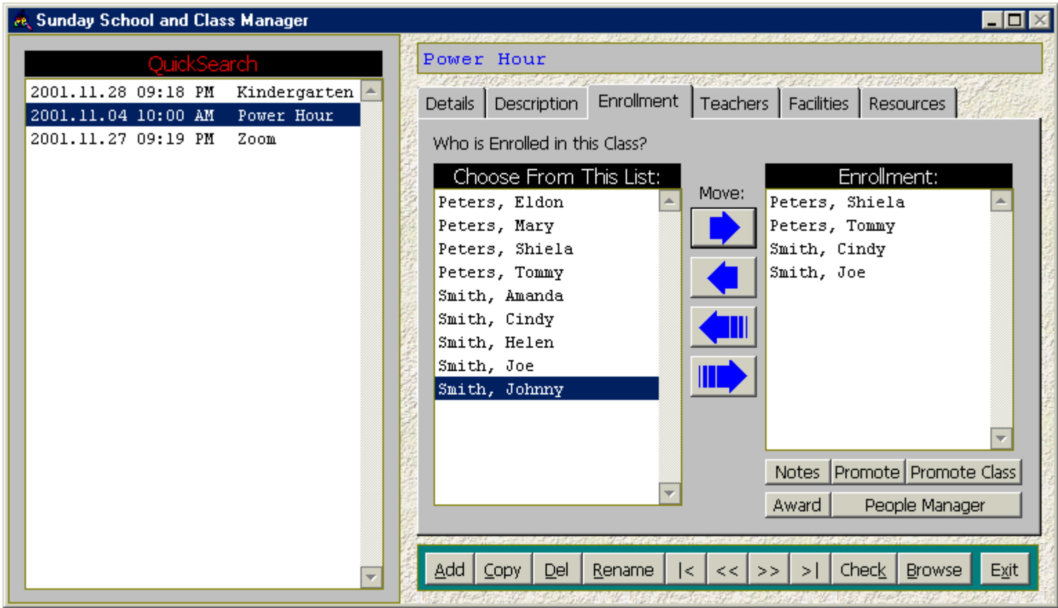


Figure 13-2 Class Manager, Enrollment Page

The Enrollment page is provided to record the people enrolled in the class for the purpose of tracking detailed attendance. Entering class enrollment is optional.

To add a person to the enrollment list, select the person from the left list and then click the right facing arrow button. You can also move all people to the enrollment list by clicking the broken right facing arrow button.

To remove a person from the enrollment list, select the person from the right list and then click the left facing arrow button. You can also remove all people from the enrollment list by clicking the broken left facing arrow button.

Class Notes

You can record confidential class notes for each person enrolled in a class. The class notes are protected by ChurchWatch's security measures and only those users who have access to class notes may view and create them. The class notes are free-form and any amount of information can be entered. Click the NOTES button to access or create class notes.

Promoting People and Classes

You can promote (and optionally move) a single person or the entire class to a new class by clicking the PROMOTE or PROMOTE CLASS buttons. When you click one of these buttons you will be prompted with two choices. You can choose to just promote (move) people to a new class or you can choose to mark the class as achieved without moving people to a new class. When you promote a person or class ChurchWatch records the class as 'achieved' in each person's class data. Classes achieved can be viewed in the People Manager under the SS page. A PEOPLE MANAGER button is provided here on the Class Manager form for convenience.

When promoting a person or class you will also be given the opportunity to assign a special award. Refer to the next paragraph for more information.

Assigning Special Awards

Special Awards can be assigned when a person or class is promoted or by clicking the AWARD button. Before doing so, you will need to create some award names - refer to Chapter 6 (Lists) for more information. An example of a special award might be "Gold Star Attendance Award". You can name the awards anything you like. There are also several reports available in the Report Manager pertaining to awards.

Teachers Page

The teachers page is used to optionally assign teachers to a class if this is something you want to keep track of. ChurchWatch will remember who has taught which classes and this can be quite useful in the future when trying to remember who has experience teaching specific classes.

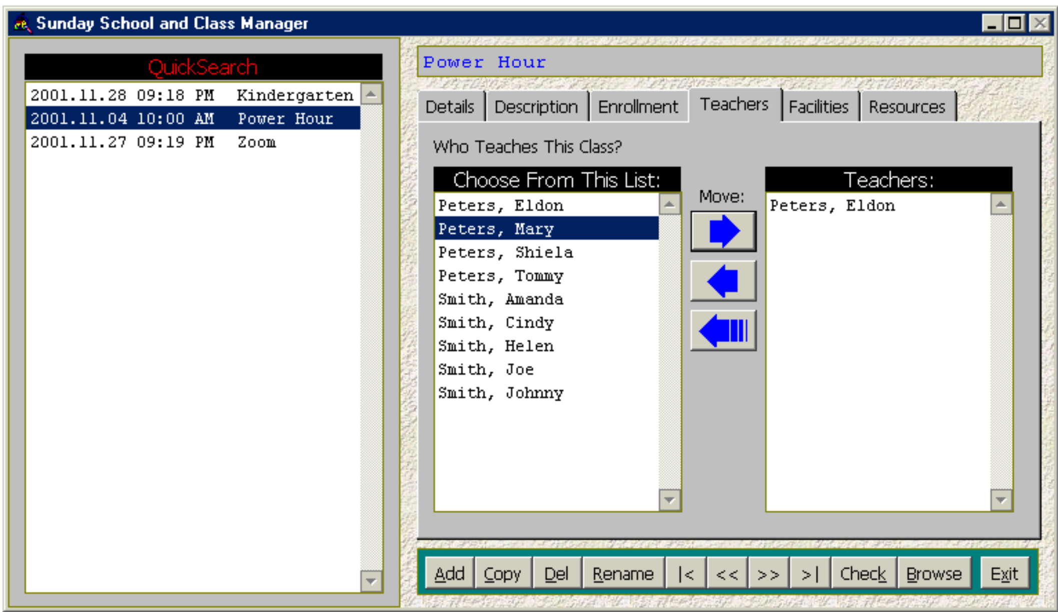


Figure 13-3 Class Manager, Teachers Page

To mark a person as teacher, select a person from the left list and then click the right facing arrow button. You may add as many teachers as required. To remove a teacher or all teachers click the left facing arrow or the broken left facing arrow. It is important to note, however, that once a person has been placed in the right list, <u>even for just a moment</u>, he/she has been remembered as a teacher of this class. When you remove the teacher from the list you will be asked if you want to remove this class from the person's list of taught classes. You can also use the People Manager, SS page. Refer to a later paragraph in this Chapter.

Facilities and Resource Pages

The Facilities and Resource pages work exactly as they do in the Event Manager. Refer to chapter 12 for more detailed information.

People Manager, S.S. Page

The People Manager has a Classes page which gives a full view of all class related information for a single person.

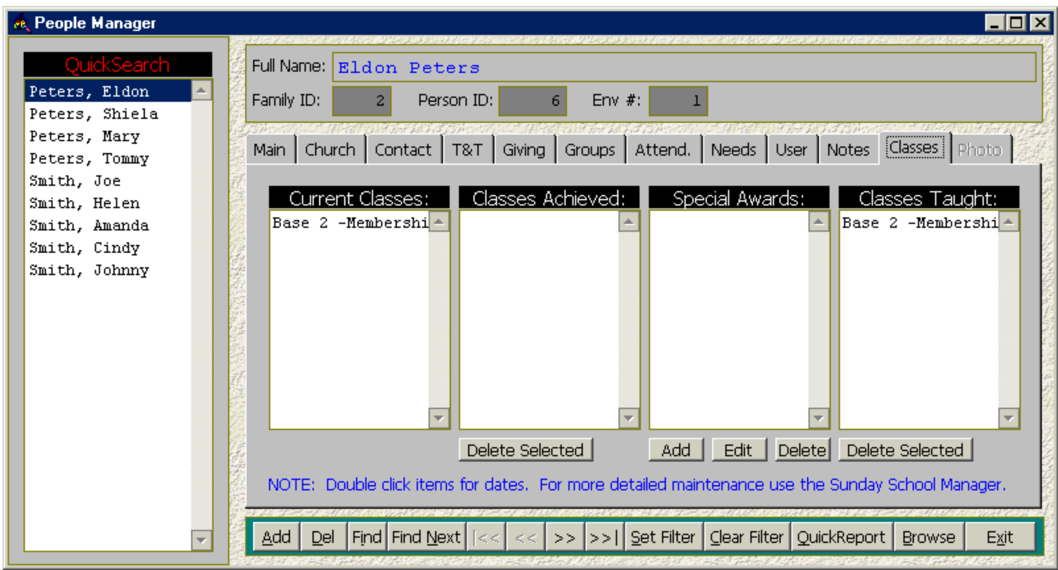


Figure 13-5 People Manager, Classes Page

The buttons below each list allow you to do some simple manipulation and clean-up of data. The data shown in the achieved, awards, and classes taught lists will be remembered even after you delete the class.

Tip:	*You can get the date information for any item except current classes by double clicking on an item in a list.*

Chapter 14 - The Attendance Manager

The Attendance Manager is used to enter attendance and/or meeting minutes for a specific occurrence of an event or class (hereafter referred to simply as 'events'). You can also use the Attendance Manager to view the list of event occurrences both in the past and in the future. Some simple manipulation of event occurrences is also possible.

Recording Methods

The Attendance Manager provides several ways to record Attendance information. You can record:

- a simple attendance summary, which is just the number of people attending an event.
- an attendance summary by membership types. This allows you to record the number of people in each membership category to provide slightly deeper statistics.
- detailed attendance by person. You can record in detail each person that was present, excused, sick or absent from the event.
- a combination of the above. You can record both details and summary if you want. In fact, ChurchWatch will keep the summary information up to date automatically if you wish.

The Attendance Manager Form

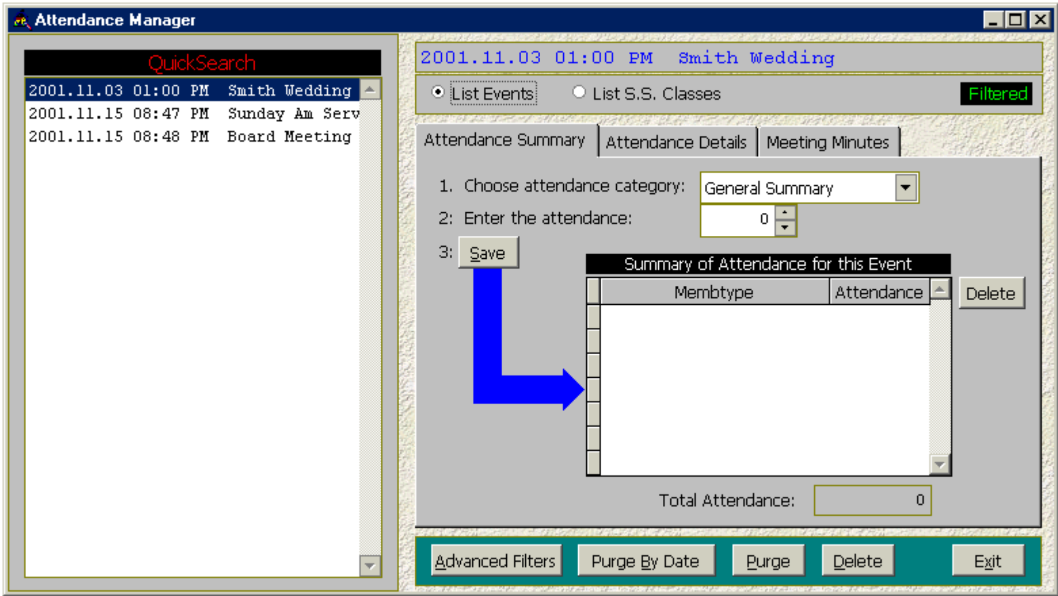


Figure 14-1 The Attendance Manager

The Attendance Manager form consists of a list of events on the left side, a set of pages for entering attendance information and a set of buttons to manipulate the selected event. The form always works on the event that is selected in the QuickSearch list. The name of the current event also appears in blue near the top of the form. Always make sure you have chosen the correct event and date combination before entering any attendance data. Table 14-1 describes the form buttons and the sections following explain each page in detail.

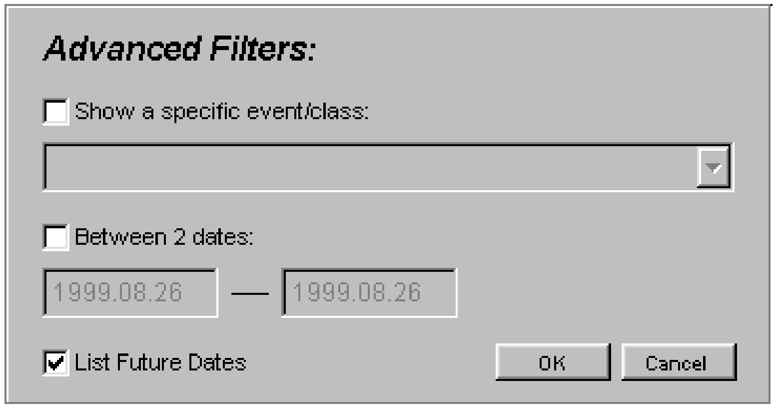
Button	Description
Advanced Filters	Click this button to change what is displayed in the event list. The following options will be displayed.  Figure 14-2 Advanced Options
Purge By Date	Click this button to delete ALL attendance information for the <u>selected event</u> prior to and including a date that you provide. This deletes attendance and meeting minutes data for the selected event only. ***Note:*** *Since ChurchWatch never automatically deletes attendance data, you should purge your data once in awhile to preserve disk space. A complete purge for all events prior to and including a date that you specify can be performed in the SETUP form under the EVENTS page.*
Purge	Click this button to delete ALL attendance information for the <u>selected event occurrence</u> only. This deletes attendance and meeting minutes data for a single selected event occurrence only.
Delete	Click this button to delete the selected event occurrence. This operation is of limited use and requires some explanation. ChurchWatch “looks-ahead” to recreate future event occurrences every time you start ChurchWatch. For this reason deleting a future event occurrence will have no lasting effect since ChurchWatch will just recreate it. Deleting past event occurrences will work as expected. This button is provided to remove event occurrences that do not match the current schedule. Refer to the paragraph titled “Changing the Date or Recurring Information” in Chapters 12 and 13 for more detailed information on how this situation can occur.
Exit	Click this button to exit the Attendance Manager.

Table 14-1 The Attendance Manager Buttons

QuickSearch List

Click on an event in the QuickSearch list to make it the current event. If the event of interest is not displayed, click the scroll bar to move the list and view more classes. You can also click the ADVANCED button to change what is displayed in the list. You can also right click on a list item or on the QuickSearch title for more options.

Attendance Summary Page

The Attendance Summary page is the main page of the Attendance Manager. Use this page if you are not interested in recording the details of WHO attended. This page simply records the number(s) of people attending the event. There are two possible ways to record the summary data:

Step 1 Refer to figure 14-1. Select the attendance summary category. If you just want to record the number of people attending the event, choose "General Summary". If you would like to record the attendance data in a slightly more detailed way you can set the membership level to record how many people of a specific level attended. For example, you could pick "Full Member". Of course, this second method will require several entries to complete the attendance for a single event.

Step 2 Enter the attendance (how many people attended).

Step 3 Click the SAVE button to save the attendance. The record will be shown in the summary list beside the SAVE button.

To correct a record, select the category again and enter a new attendance number. Click SAVE and the record will be automatically updated. Use the DELETE button to delete a record.

Attendance Details Page

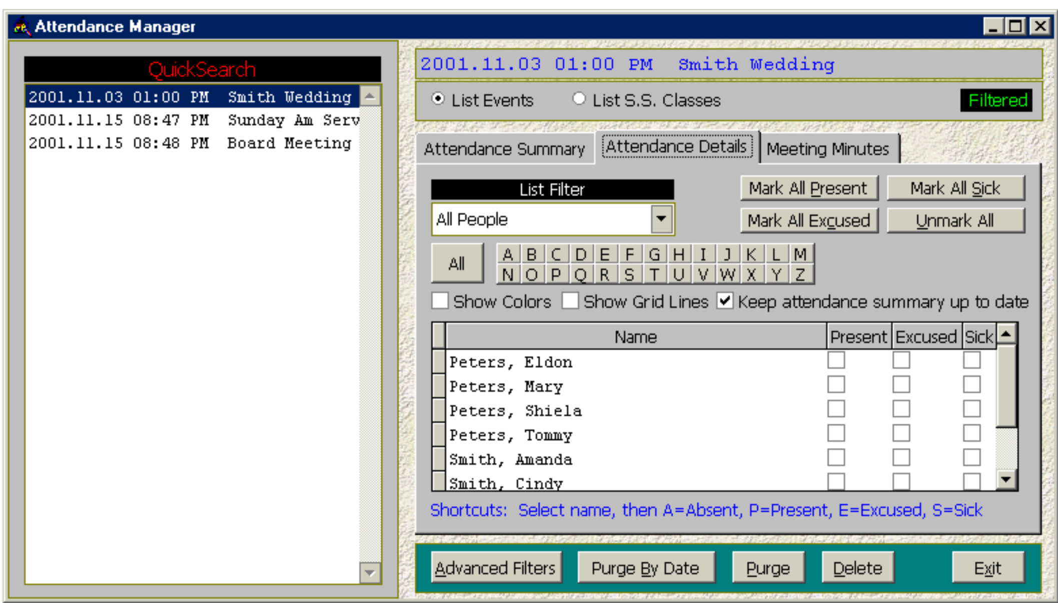


Figure 14-3 Attendance Manager, Details Page

Use the Attendance Details Page to record specifically who attended or did not attend an event. You can also check the "Keep Summary Up To Date" checkbox to have ChurchWatch automatically keep the summary information up to date while you enter the detailed attendance. Table 14-2 explains each item on this page.

Form Item	Description
List Filter	If you would like to reduce the list of people in the attendance list to something more manageable such as people enrolled in a class, you can select a filter here. Using a filter along with one of the "Mark All..." buttons can make attendance entry much easier. The possible selections are: All People — All people in the database. People Required — Only those people required at an event. Not valid for classes. Class Enrollment — Only those people enrolled in a class. Not valid for an event. Directory — Only those people marked for the church directory. All Men — Men only. All Women — Women only. All Children — Children only. Main Contacts — Main contacts of households only. Spouses — Spouses only. 'Others' — People with authority set to 'other' only. Specific Group — Only those people in a specific group. Specific Membership — Only those people with a specific membership level. Specific Need — Only those people with a specific need. Specific Talent or Ministry — Only those people with a specific time & talent. Specific Marital Status — Only those people with a specific marital status. Custom Filter — Any filter of your choice. Refer to Chapter 24.
Mark All Present	Click this button to mark all people in the attendance list present.
Mark All Sick	Click this button to mark all people in the attendance list sick.
Mark All Excused	Click this button to mark all people in the attendance list excused.
Unmark All	Click this button to mark all people in the attendance list absent.
"All" and letter buttons	Click the ALL button to set the filter condition to "All People". Click a letter button to reduce the list to people with last names that begin with the letter selected.
Show Colors	Click this to show colors in the table grid. This can assist in data entry.
Show Grid Lines	Click this to show grid lines in the table grid. This can assist in data entry.
Keep Summary Up To Date checkbox	Check this box to cause ChurchWatch to automatically keep the attendance summary correct and up to date based on the attendance details. ChurchWatch will record summary information by membership level.
Attendance List	Use the attendance list to enter detailed attendance information. You may check one of Present, Excused or Sick or leave all three unchecked for Absent.

Table 14-2 The Attendance Details Page Items

Absentees

To mark a person absent from the event, simply do not check any of the Present, Excused or Sick checkboxes.

Meeting Minutes Page

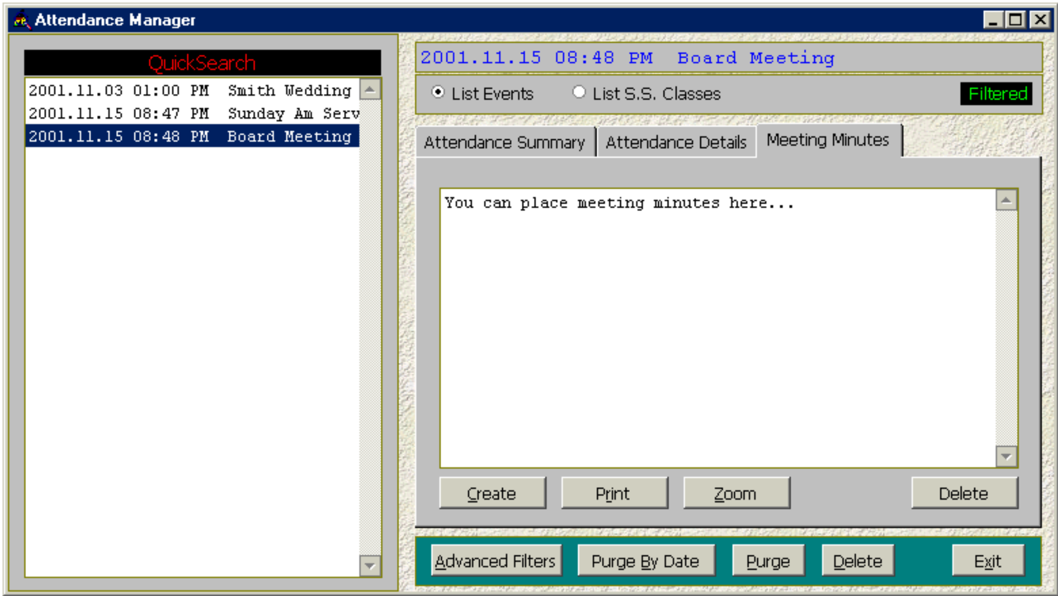


Figure 14-4 Attendance Manager, Meeting Minutes Page

The Attendance Manager allows you to record the minutes from meetings on the Meeting Minutes page. You could also record general notes here. First select a class or event from the QuickSearch list, then select the Meeting Minutes page. There are no font or other formatting capabilities in the edit window. Table 14-3 explains the buttons on this page.

Button	Description
Create	If the meeting minutes window is grey in color, it means that a notepad has not been created yet. Click this button to create and open the meeting minutes.
Print	Click this button to print the meeting minutes to a printer.
Zoom	Click this button to open an edit window to permit easier editing of the minutes.
Delete	Click this button to delete the meeting minutes for the selected event.

Table 14-3 The Meeting Minutes Page Buttons

Chapter 15 - The Mail Manager

The Mail Manager is used to quickly and easily manage church mailings including:

- form letters
- mail merges to popular word processing programs
- mailing labels in many different formats
- bulk e-mail
- and even name tags for special events

This chapter explains how to use the mail manager.

Choosing People and Families

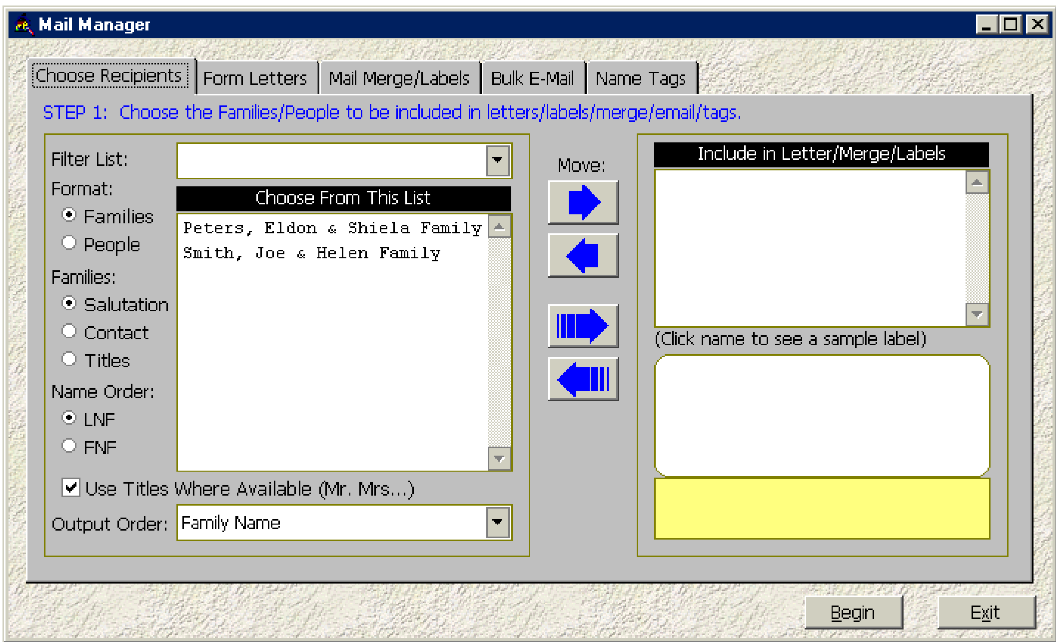


Figure 15-1 The Mail Manager

The first step before creating any mailings is to choose the families or people that will be included in the mailing. The People page of the Mail Manager is used for this purpose. Refer to figure 15-1. The main list at the left lists all the people or families that you can choose from. You can change who is listed by selecting a filter from the “Filter List” pulldown. You can also change the format of the salutation by selecting one of the format radio buttons. This is all explained in more detail in the following paragraphs.

Filtering the People List

Generally, the initial list of people you can choose from (all people in the database) is too large to manage effectively. Several filters are provided to help reduce the size of the list to make selection simpler. Use the Filter List pulldown to select one of the following:

All People	All People in the database (no filter)
Directory	All families in the church directory
All Men	All men
All Women	All women
All Children	All children
Main Contacts	All main contact persons
Spouses	All spouses
‘Others’	All people with authority marked “other”
Specific Group	All people in a specific group
Specific Membership	All people of a specific membership
Specific Need	All people with a specific special need
Specific Talent	All people with a specific time & talent (see chapt. 6 & 9)
Specific Marital Status	All people with a specific marital status
Required @ an Event	All people required at an event of your choice
Class Enrollment	All people enrolled in a class of your choice
All Teachers	All people presently teaching
Temp. Givers	All people marked as temporary in the Household Manager
Home E-mail	All people with a non-blank home e-mail address
Work E-mail	All people with a non-blank home e-mail address
House Checkbox #1	All families who have user-defined checkbox #1 checked the Household Manager
House Checkbox #2	All families who have user-defined checkbox #2 checked the Household Manager
People Checkbox #1	All people who have user-defined checkbox #1 checked the People Manager
People Checkbox #2	All people who have user-defined checkbox #2 checked the People Manager
People Checkbox #3	All people who have user-defined checkbox #3 checked the People Manager

When you select one of the above filters the left list will be refreshed and the list on the right will be cleared. Note that choosing a filter does not actually select any people for the mailing, you will still have to make the people selections.

Choosing a Salutation Format

ChurchWatch will automatically create a salutation based on one of the formats you choose. Table 15-1 lists all possible salutation combinations. Note that LNF stands for Last-Name-First and FNF stands for First-Name-First.

As you can see from the following table, you can control the formatting of names in a variety of ways:

Selected Format	What would appear on a mailing label with titles defined in the People Manager and "Use Titles" checked	What would appear on a mailing label with titles defined in the People Manager and "Use Titles" NOT checked	What would appear on a mailing label with no titles defined in the People Manager
Families, Salutation, LNF	Smith, Mr. Joe & Mrs. Helen	Smith, Joe & Helen	Smith, Joe & Helen
Families, Salutation, FNF	Mr. Joe & Mrs. Helen Smith	Joe & Helen Smith	Joe & Helen Smith
Families, Head, LNF	The Smith Family	The Smith Family	The Smith Family
Families, Head, FNF	The Smith Family	The Smith Family	The Smith Family
Families, Titles, LNF	Smith, Mr. & Mrs. Joe	Smith, Joe & Helen	Smith, Joe & Helen
Families, Titles, FNF	Mr. & Mrs. Joe Smith	Joe & Helen Smith	Joe & Helen Smith
People, LNF	Smith, Mr. Joe	Smith, Joe	Smith, Joe
People, FNF	Mr. Joe Smith	Joe Smith	Joe Smith

Table 15-1 Salutation Formats

Using Titles

If a title (Mr, Mrs, etc) has been defined for a person, ChurchWatch will use it if you check the "Use Titles Where Available" box. Preferred names are also used if available.

Setting the Output Order

You can choose the sort order for the Mail Manager's output by using the pulldown list near the bottom of the main page. The default order is by family name.

Selecting People For Mailings

To choose a person for a mailing, click on the name in the left list and then click the right facing arrow. You may select more than one person at a time by pressing the SHIFT key while clicking. You can move all people in the left list to the right list by clicking the right facing broken arrow. Use the left facing arrows to remove people from the mailing selection list.

Tip:	*To see a sample label format, click on a name from those you have selected (in the list on the right).*

Note:	*Deceased people cannot be included on mailings.*

Form Letters

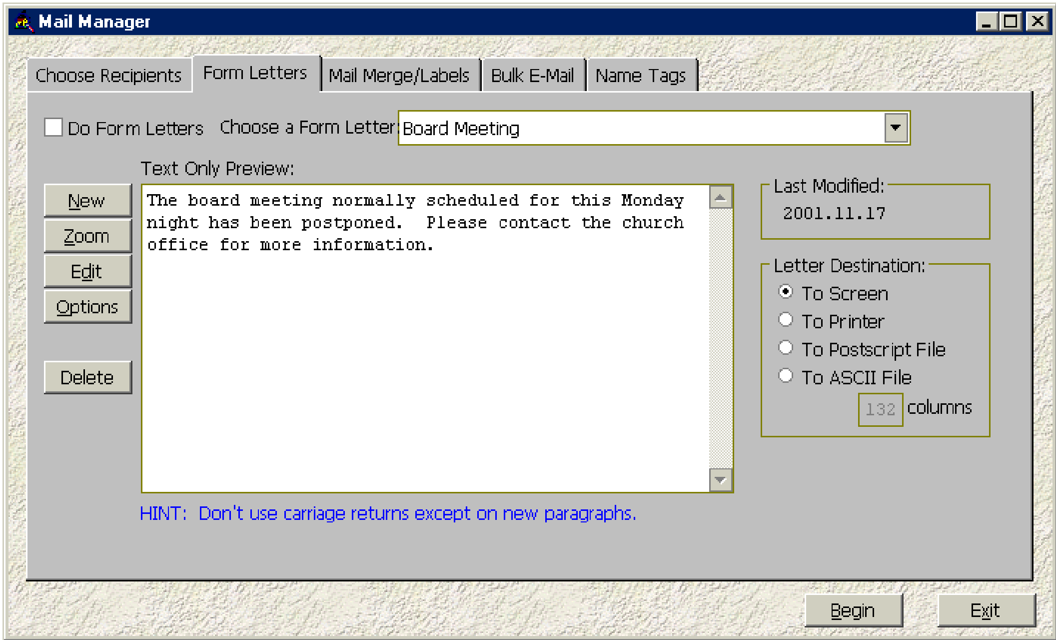


Figure 15-2 Mail Manager, Form Letters Page

Once you have chosen people you can create a form letter. A copy of the form letter will be printed and addressed to each person you have selected. The form letters you create are stored and can be re-used at a later date. Table 15-2 explains each item on this page.

Form Item	Description
Do Form Letters	Check this box to select the form letter for processing.
Choose a Form Letter	This box lists all form letters you have defined. If you want to use one of these just select it here.
New	Click this button to create a new form letter. You will be prompted to give it a unique name.
Zoom	Click ZOOM to open a larger edit window for working on the form letter’s text.
Edit	Click Edit to edit the form letter’s text.
Options	Click options to set a form letter header and/or a digitized signature. Each of these must be a BMP, JPG or GIF graphics file.
Delete	Click this button to delete the selected form letter.
Edit Window	The Edit Window is used to edit the form letter’s text. You can also click ZOOM to open a larger window.
Last Modified	Shows the last time you modified this form letter.
Letter Destination	Choose a destination for the form letter. Note that when choosing “Postscript File” your printer driver must be capable of creating one.

Table 15-2 Form Letter Page Items

Note that no formatting or font options are available on the form letter. If more formatting options are required, a mail merge using a popular Word Processor is suggested.

Tip: *When editing the form letter do not use carriage returns since the printed form letter will auto-wrap words at the margins.*

Mailing Labels

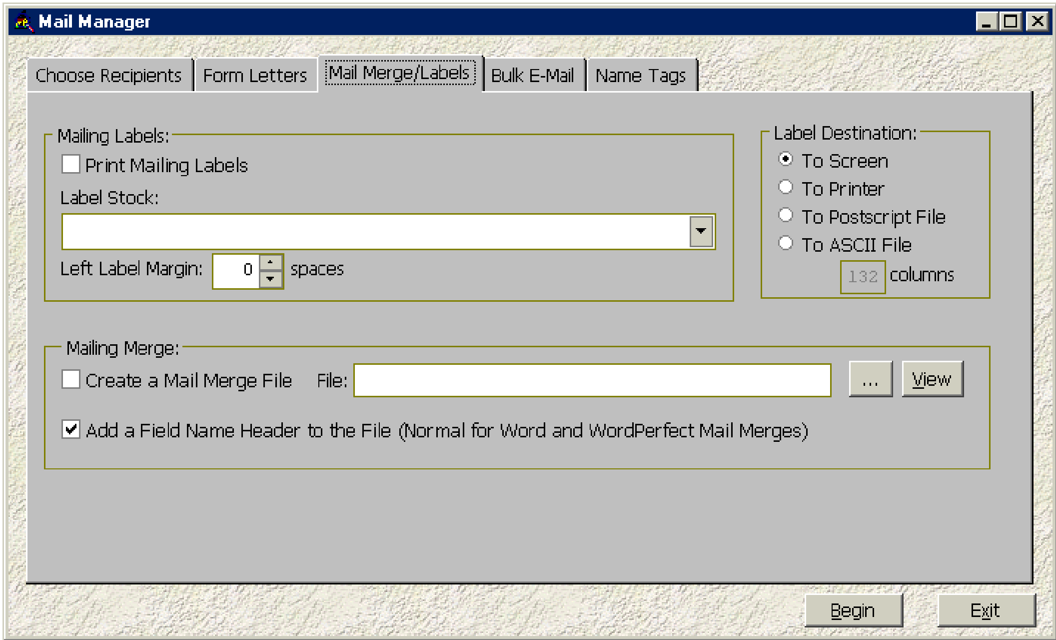


Figure 15-3 Mail Manager, Mail Merge/Labels Page

Mailing labels are created using the people and the salutation format you chose on the People page. Printing the mailing labels is as simple as this:

1. Check the “Do Mailing Labels” checkbox
2. Choose a label stock that matches your labels. If your label stock is not listed, choose one that is similar in size.
3. Choose a destination and click the BEGIN button at the bottom of the form.

If more left margin is required you can set it before clicking the BEGIN button. This will move the text on each label the specified number of spaces to the right.

Mail Merges

When you select to create a mail merge, ChurchWatch will create an ASCII comma-delimited text file with the names and addresses of the people you have selected. ChurchWatch normally adds a header record to the file to assist WordPerfect and Word in the mail merge. Normally you will want to leave the “Add a Field Name Header” checkbox checked. Here is some example output:

```
First_Names,Last_Name,Salutation,Address1,Address2,City,State_or_Prov,Zip_Code,Country
"Wes & Amanda","DRURY","DRURY, Wes & Amanda","123 Any Street","","Saskatoon","SK","","CANADA"
"Milton","PETERS","PETERS, Milton","456 Apple Street","","Saskatoon","SK","","CANADA"
```

This type of format can be used by popular word processors as a mail merge data file or you can use it anywhere this type of a file would be useful. Both Microsoft Word and Corel WordPerfect will accept a file of this type for use in a mail merge. To create the mail merge file:

1. Click the “Create a Mail Merge File” checkbox
2. Click the browse button (“...”) to set the file name for the output file. Take note of where you store the file so that you will be able to find it when its time to perform the mail merge with your word processor.
3. Click the BEGIN button.

MAIL MERGE USING COREL WORDPERFECT (tm)

(This has been tested in WordPerfect 7 and 9)

1. Create a mail merge data file using the ChurchWatch Mail Manager as described above. Make sure the “Add a Field Name Header” checkbox is checked.

2. In WordPerfect, click FILE and select OPEN. Enter the name of the data file you created in step 1.

3. When prompted for file type, choose ANSI (WINDOWS) Delimited Text File.

4. An Import Data Form is displayed. Set up the following attributes:

Choose Import As = Merge Data File
Delimiter = ,
Record = [CR][LF]
Encapsulated = "
Strip = <leave blank>

5. Check off "First Record Contains Field Names"

6. Click OK.

7. The file will be created and shown in the main document window. Click FILE-SAVE AS and save your data file as <filename>.DAT. Then close the window.

To do the merge:

8. Click TOOLS-MERGE

9. Click CREATE DOCUMENT

10. If prompted, Click "Use File in Active Window" to use existing document or "New Document Window" to create a new document

11. Click "Associate Data File" and set the file to the file you saved in step 7. Click OK.

12. Near the top left corner of the screen click on Insert Field to insert a field from your merge data file. Continue this process to create your merge document template.

13. When done, click the MERGE button on the toolbar. In the form that appears click MERGE to complete the merge.

MAIL MERGE USING MICROSOFT WORD (tm)

(This has been tested on Word97)

1. Create a mail merge data file using the ChurchWatch Mail Manager. Make sure the "Add a Field Name Header" checkbox is checked

2. In Word, click on TOOLS-MAIL MERGE

3. Under "Main Document" click CREATE and then choose what you wish to create (form letter, labels etc)

4. Click Active Window to use existing document or New Main Document to create a new document

5. Under "Data Source" click GET DATA. Choose OPEN DATA SOURCE.

6. Choose the merge output data file you created in step 1.

7. You may get a message at this point and if so click on Edit Main Document

8. Near the top left corner of the screen click on Insert Merge Field to insert a field from the merge data file. Continue this process to create your merge document template.

9. When done, Click on TOOLS-MAIL MERGE again. Under item #3 click the merge button to perform the merge.

10. Follow the Word instructions to complete the merge to a new document.

Bulk E-Mail

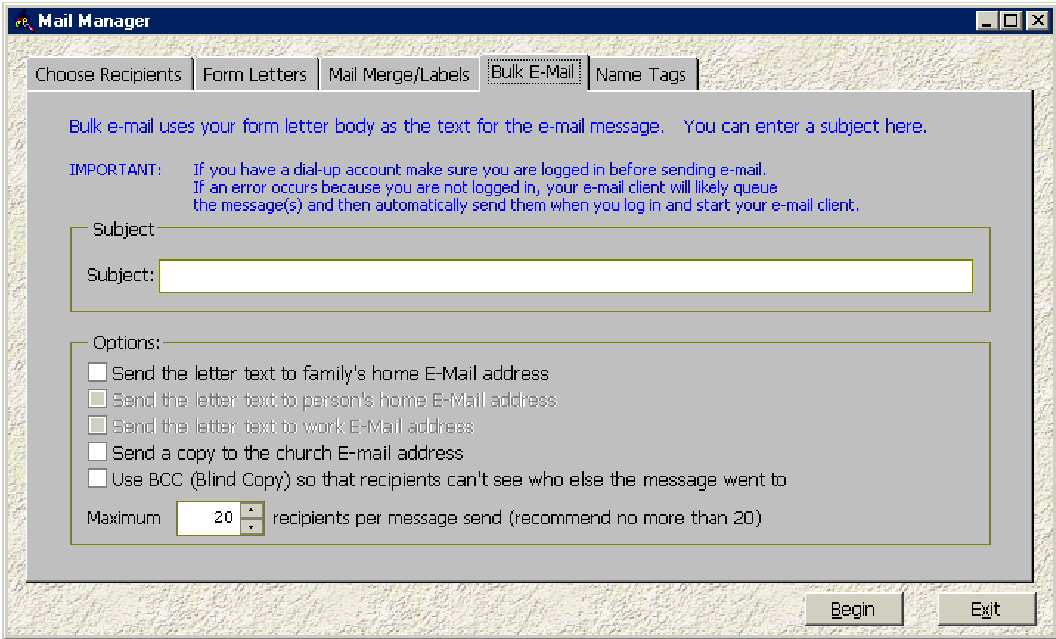


Figure 15-4 Mail Manager, Bulk E-Mail Page

This page allows you to send e-mail to the people or families you have selected on the People page, provided that each person or family has an e-mail address entered.

E-Mail is not guaranteed to work for everyone as several conditions must be met and a certain amount of insight into how MAPI clients work is required:

- You must have a dial-up or direct cable connection to the internet.
- You must have a MAPI aware e-mail program such as Eudora (tm) or Microsoft Outlook (tm)
- You must be logged onto the Internet before clicking the BEGIN button.

Troubleshooting Email

Problems sending e-mail are usually related to not having a MAPI enabled e-mail client. Try this simple test: Click on the Windows START button and choose RUN. Enter “mailto:admin@churchwatch.com” and click OK. Your email client should start.

The Bulk E-Mail operation uses the form letter body you choose on the form letter page. To send an e-mail message to all people you have selected do the following:

1. Choose or create a new form letter body on the form letter page. Type the message you want to e-mail into the body of the form letter. You do not need to check the "Do Form Letters" checkbox unless you also want to create form letters.
2. On the Bulk E-Mail page, choose the options you want and set the subject.
3. Set the maximum number of recipients. We recommend no more than 20 or your internet mail provider may reject the message.
4. Finally, click the BEGIN button.

Important:	*ChurchWatch has no control of the e-mail process once you click the BEGIN button. If an error occurs, a message will be displayed explaining the error and ChurchWatch may shutdown. If this occurs, double check that you are connected to the internet and make sure you have a MAPI-aware e-mail program.*

Name Tags

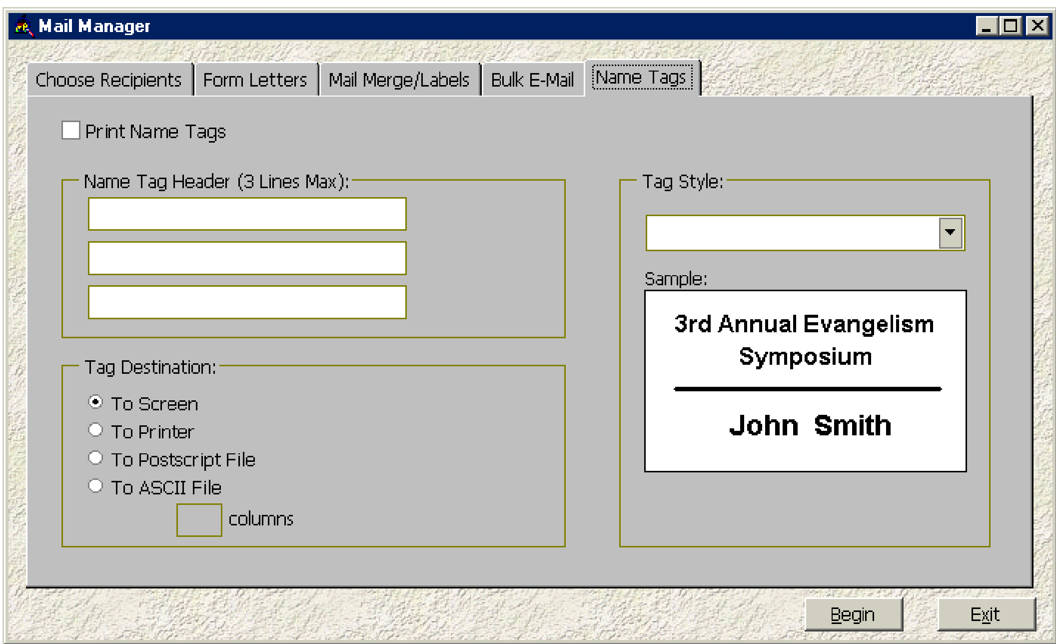


Figure 15-5 Mail Manager, Name Tags Page

While not really a mail function, name tag generation fits nicely into the Mail Manager since it also uses the people you selected on the People page. ChurchWatch prints name tag sizes to fit standard name tag stock you can purchase at any stationary store.

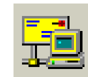
To create name tags:

1. Check the “Print Name Tags” checkbox.
2. Enter up to three lines of text to be printed at the top of each name tag.
3. Select the tag stock you have. If your stock is not listed, choose one that is similar in size.
4. Select a tag destination. Print to screen first to preview the results.
5. Finally click the BEGIN button.

Tip:	*When choosing the name tag style, the Avery formats usually work better.*

Tip:	*For all operations in the Mail Manager, always print to screen first to preview the results before committing to the printer.*

Chapter 16 - The Message Manager



The Message Manager provides a convenient way to send inter-office messages from one user of ChurchWatch to another. Recipients do not need to be logged in at the time since they will be notified of new mail the next time they log in. Inter-office messaging is similar to e-mail but you cannot send messages outside of ChurchWatch.

- Send messages to any other user of ChurchWatch or to yourself
- Notification when a new message arrives
- Easily review received, sent and saved messages

Pre-Requisites

The Message Manager is available only when you have turned on security in the SETUP form and is only useful if more than one user has been defined. The Message Manager is most useful in multi-user network environments or possibly when more than one user uses a single installation of ChurchWatch. A network is not required.

The Message Manager Form

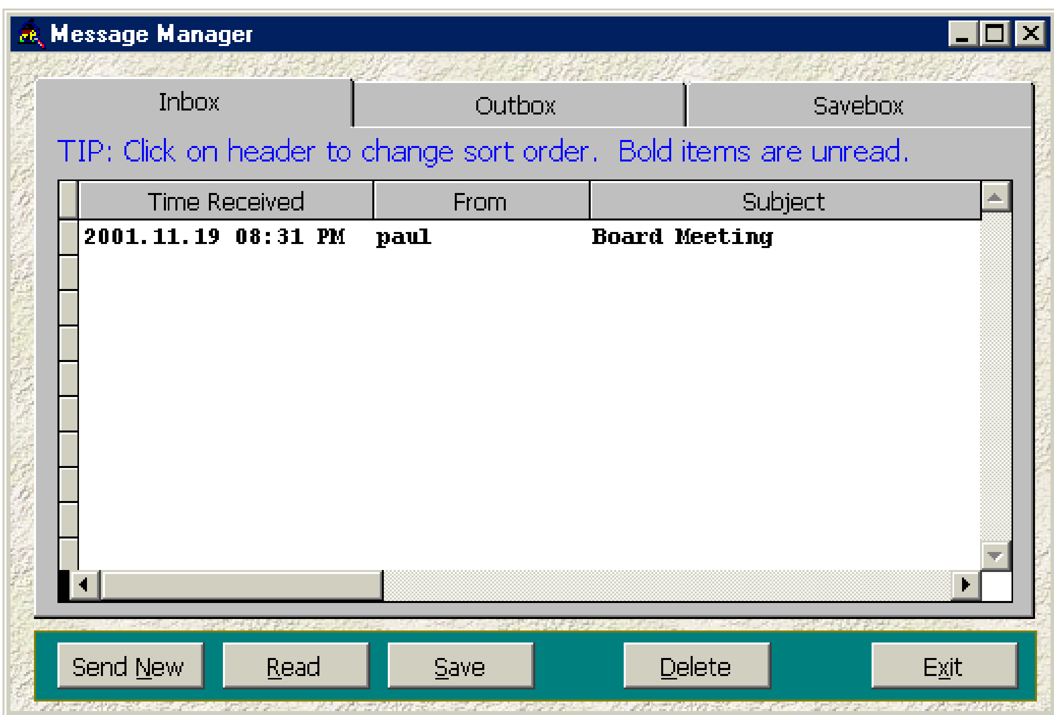


Figure 16-1 The Message Manager

The Message Manager form has 3 pages or mail boxes: received mail (Inbox), sent mail (Outbox) and saved mail (Savebox). Table 16-1 explains the buttons at the bottom of the Message Manager.

Button	Description
Send New	Click this button to compose a new message and select the ChurchWatch users you want to send it to. Refer to the paragraph below on sending new messages.
Read	Click this button to read the message selected in the current mail box. You can also just double click on a message description to read it.
Save	Select a message in either the inbox or the outbox and then click this button to move it to your savebox. This is useful for messages you want to keep for awhile but don't want cluttering up the in and out boxes.
Delete	Select a message in one of the mail boxes and then click this button to delete it.
Exit	Click this button to exit the Message Manager.

Table 16-1 Message Manager Buttons

Reading Messages

To read a message just double click on it, or click on it to select it and then click the READ button. The form shown in figure 16-2 will be displayed and at this point you have several options:

- Forward — Click the FORWARD button to forward a copy of this message to another ChurchWatch user.
- Reply — Click the REPLY button to send a reply message to the originator of the message.
- Reply All — Click the REPLY ALL button to send a reply message to the originator of the message and to all other users that received the original message.
- Print — Click the PRINT button to print this message.
- Exit — Click the EXIT button to exit.

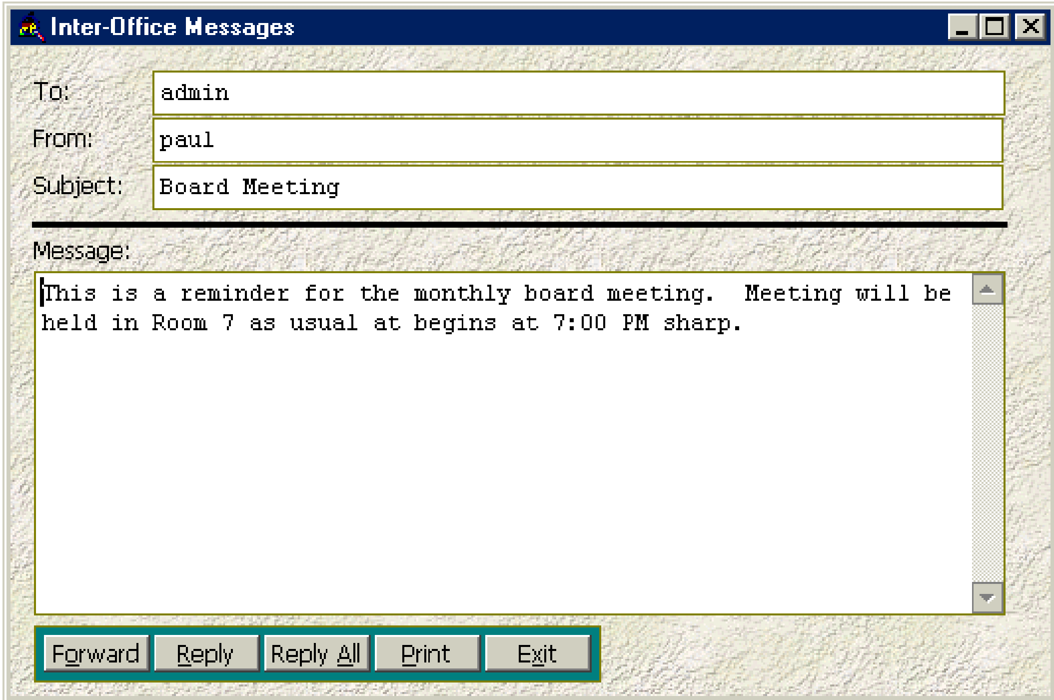


Figure 16-2 Reading a Message

Sending a Message

To create and send a new message, click the SEND NEW button on the Message Manager form. The following form will be displayed:

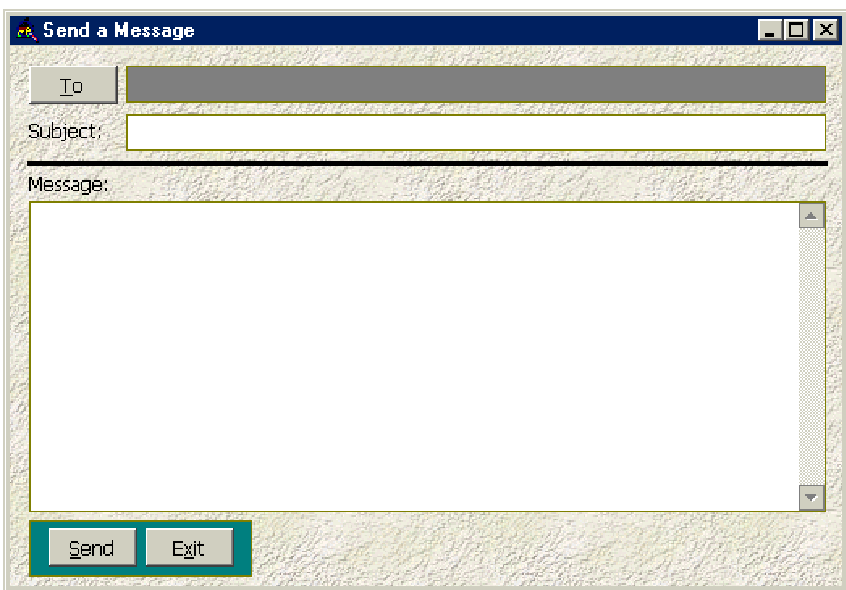


Figure 16-3 Sending a New Message

First, click the TO button to select which users you are going to send the message to. The following form will be displayed:

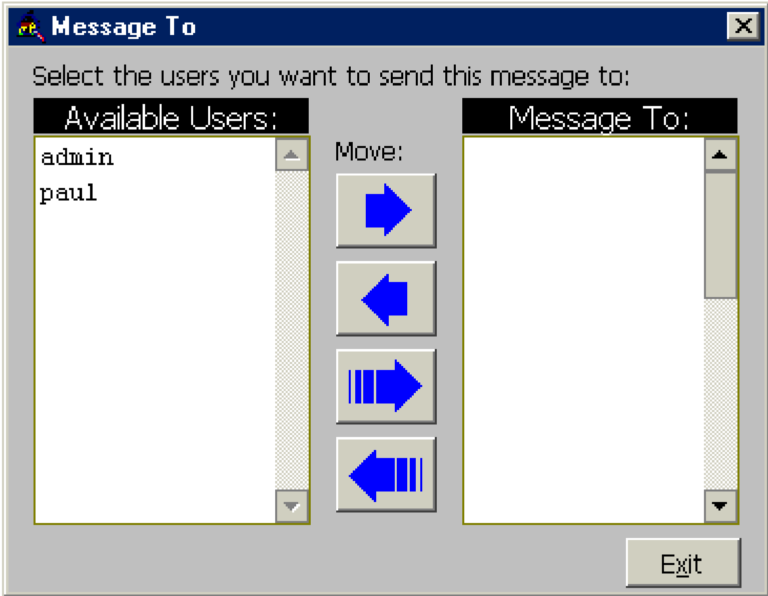
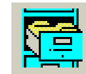


Figure 16-4 Selecting Users

All ChurchWatch users will be shown in the selection list on the left. Select one user by clicking on a name or select several users by holding the SHIFT or CTRL keys while clicking. Then click the appropriate arrow button to move the user names to the right list. The message will be sent to the users listed in the right list. Click EXIT when you are satisfied with your selections.

Finally, enter a subject and the body of the message and click the SEND button.

Chapter 17 - The Sermon Manager



The Sermon Manager is a handy way to keep close track of sermon texts. Sermon text is not actually stored within ChurchWatch. Instead ChurchWatch manages the locations of the files and helps you to find the proper sermon more quickly. This way you can use your favorite word processor to edit the sermon text. ChurchWatch can even launch your word processor for you.

Setup

The only setup required is to set the path to your favorite word processor. This is done in the SETUP form on the USER PREFERENCES page.

The Sermon Manager Form

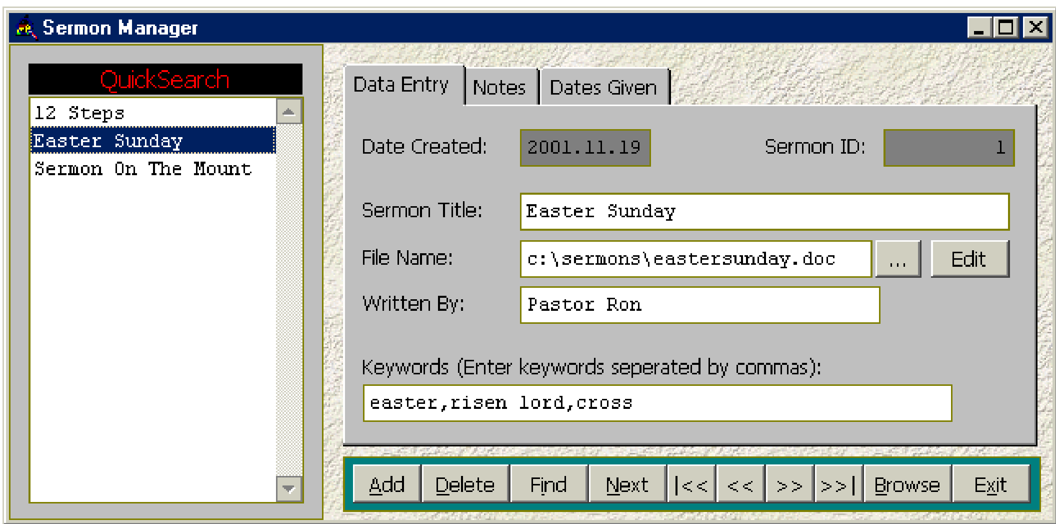


Figure 17-1 The Sermon Manager

The Sermon Manager consists of the usual QuickSearch list and 3 pages on which you can enter information about the sermon. The Sermon Manager has a sophisticated FIND command that can search by keyword, title or creation date.

Form Item	Description
PAGE 1	
Date Created	The date the sermon entry was created. You can search on this date.
Sermon ID	Unique ID used internally by ChurchWatch.
Sermon Title	The sermon title. Can be any text.
File Name	Path and file name of the sermon file. Sermons are typically created in a word processor and stored somewhere on your hard disk. This field informs ChurchWatch where the file is. Choose a permanent location for your sermons before using the Sermon Manager because moving the files will break the link between the file and the Sermon Manager.
...	Click this button to help find and set the sermon file.
Edit	Click this button to launch your word processor to edit the sermon file.
Written By	Name of the person or persons who wrote the sermon.
Keywords	You can enter a set of keywords to help you find the sermon at a later date. Keywords should be separated by commas and should contain no spaces. For example Jesus,cross,Easter,Risen Lord
PAGE 2	
Notes and Comments	Enter any free-form notes or comments in this text box.
PAGE 3	
Date Given	Enter the date the sermon was given.
Given By	Enter the name of the person giving the sermon.
Down Arrow	Click this button to save the Date Given and Given By fields to the table grid.
Table Grid	Shows a list of dates the sermon was given and who gave it.
Delete	Select a table row and click this button to delete the record.
BUTTONS	
Add	Click this button to add a new sermon file.
Delete	Click this button to delete the current sermon file.
Find	Click this button to find a sermon.
Next	Click this button to find the next occurrence of a sermon matching your search criteria.
|<<	Click this to go to the first record in the Sermon Manager.
<<	Click this to go back one sermon.
>>	Click this to go forward one sermon.
>>|	Click this to go to the last record in the Sermon Manager.

Form Item	Description
Browse	Click this to view all sermons in a spreadsheet format.
Exit	Click this to exit the Sermon Manager.

Table 17-1 Sermon Manager Form Items

Chapter 18 - The Library Manager

The Library Manager is designed as a simple way to keep track of items in a church library. The Library Manager can keep track of books, magazines, cassettes, videos etc and can keep track of borrow status on all items.

The Library Manager Form

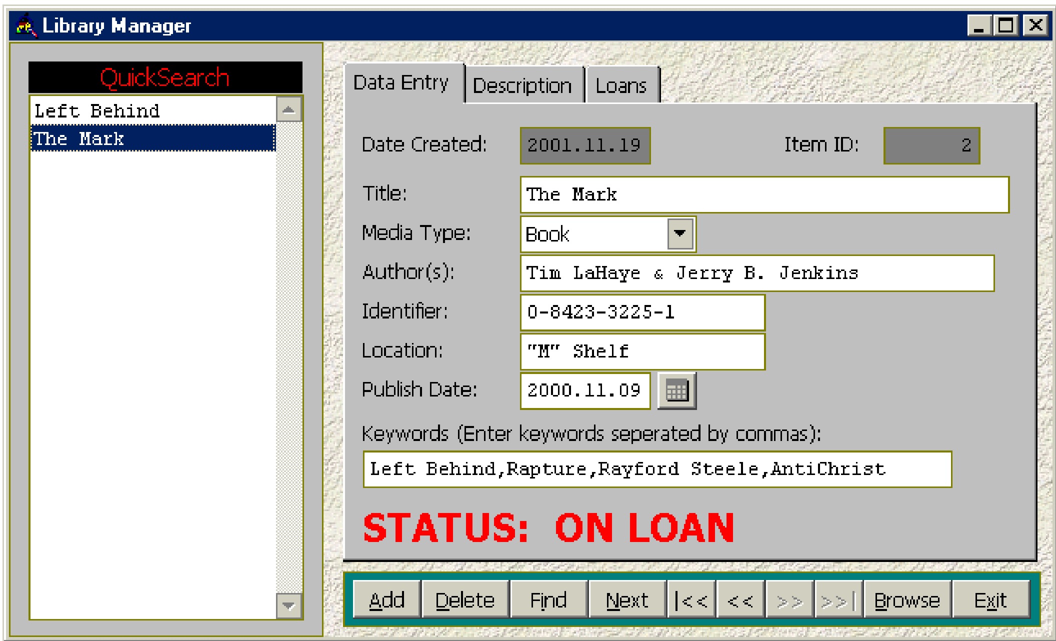


Figure 18-1 The Library Manager

The Library Manager consists of the usual QuickSearch list and 3 pages on which you can enter information about a library item. The Library Manager has a sophisticated FIND command that can search by title, identifier, keywords or author.

Form Item	Description
PAGE 1	
Date Created	The date the library entry was created.
Item ID	Unique ID used internally by ChurchWatch.
Title	The title of the item. Can be any text.
Media Type	Set the media type using the pull down list.
Authors	Authors of the title.
Identifier	ISBN or other similar identifier.
Location	Location of this item within your church library. This field is free-form text.
Publish Date	Date the item was published.
Keywords	You can enter a set of keywords to help you find the item at a later date. Keywords should be separated by commas and should contain no spaces. For example Parenting,Children,Discipline
PAGE 2	
Description	Enter any free-form notes or comments in this text box.
PAGE 3	
Borrower	Name of the person who has the item borrowed.
Set	Click this button to set the name of the borrower and to set the loan status to “on loan”. Borrower must be found in your membership data.
Due Back	Set the date that the item is due back.
Set for Normal Loan Period	Click this button to set the due date based on the normal loan period (also set on this page).
Check Back In	Click this button to quickly return the item to the library’s list of available items.
Normal Loan Period	You can set the normal loan period in days here.
BUTTONS	
Add	Click this button to add a new library item.
Delete	Click this button to delete the current item.
Find	Click this button to find an item.
Next	Click this button to find the next occurrence of an item matching your search criteria.
|<<	Click this to go to the first record in the Library Manager.
<<	Click this to go back one item.
>>	Click this to go forward one item.

Form Item	Description
>>|	Click this to go to the last record in the Library Manager.
Browse	Click this to view all library items in a spreadsheet format.
Exit	Click this to exit the Library Manager.

Table 18-1 Library Manager Form Items

Chapter 19 - The Report Manager

ChurchWatch provides over 300 pre-defined reports! These are found in the Report Manager, a handy feature for finding, modifying attributes and printing reports. In addition, ChurchWatch version 2 adds the ability to modify any of the existing reports and to create new ones. Here are some of the features of the Report Manager:

- Reports are organized into 17 different categories for easy location
- Descriptions to help find the report you need
- Data filtering to alter the records listed on the report you choose
- Save favorite reports to make locating them much faster
- Ability to modify some simple report options on the fly
- Ability to modify the existing report layouts and even the underlying software code
- Ability to create new reports

Report Categories

There are 17 pre-defined report categories to choose from to make locating the report you need easier. Click on the radio button beside each to change the list of reports you can select from.

■ Attendance	Reports related to attendance at events and classes
■ Directories	Several church directory formats and phone listings
■ Events and To-Do	Reports related to events and your to-do list
■ Giving	Reports related to contributions and giving statistics
■ Households	Reports related to families and the Household Manager
■ People	Reports related to people details and the People Manager
■ Phone Dialer	Reports related to the phone dialer
■ Pledges	Reports related to pledging, pledge statistics and pledges vs. giving
■ ChurchWatch	System manager reports
■ Special Needs	Reports related to people's special needs
■ Time and Talents	Reports related to people's time, talents, skills, giftings, interests etc.
■ Sunday School	Reports related to Sunday School and classes in general
■ Fac & Res	Reports related to facilities and resources
■ Sermons	Reports related to the Sermon Manager
■ Library	Reports related to the Library Manager
■ User Defined	A list of all reports you have modified or created
■ Favorites	All reports you have marked as favorite.

Getting a Complete List of Available Reports

You can print a listing of all ChurchWatch reports including descriptions by selecting the "Report Listing By Name" or "Report Listing Grouped By Type" reports under the ChurchWatch category. **Note that only the ChurchWatch administrator has access to reports under the ChurchWatch category.** See your administrator for help.

Selecting a Report

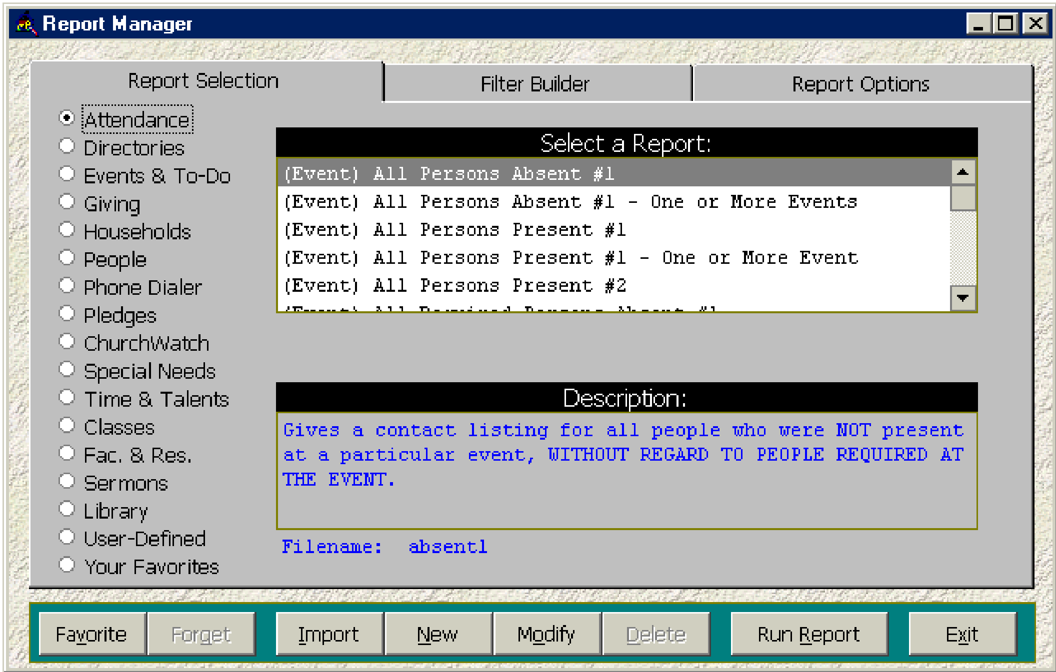


Figure 19-1 The Report Manager, Report Selection Page

When the Report Manager is opened, the form shown in figure 19-1 will be displayed. This is the main page of the Report Manager and it allows you to select the report you would like to run or modify. There is a text description of each report as well as a filename to help you locate the report file should that be necessary.

To Select and Run a Report

Begin by selecting a report category using the radio buttons at the left side of the form. The main list of reports will change as you select a new category. Next, select a report from the list of reports and finally click the RUN REPORT button to print the report to the screen. Review each of the following paragraphs for information on how to modify some of the report options, limit the records included and change the destination from the screen to the printer.

Data Filtering

To a limited extent, you can alter the records included on some reports using data filters. These are found on the second page of the Report Manager form. This can be quite a useful feature to greatly extend the actual number of reports you can produce. For example, suppose you want a phone listing of all men in the church. ChurchWatch does not provide such a report and could not possibly provide every combination of every report as there would be thousands of reports required. The solution is to use a data filter. In this example, you could choose the "All Phones" report under the Directories category and then create a data filter to include only men. Refer to chapter 26 of this manual for detailed information on data filtering. Figure 19-2 shows the Filter Builder page of the Report Manager with a filter defined for the above example.

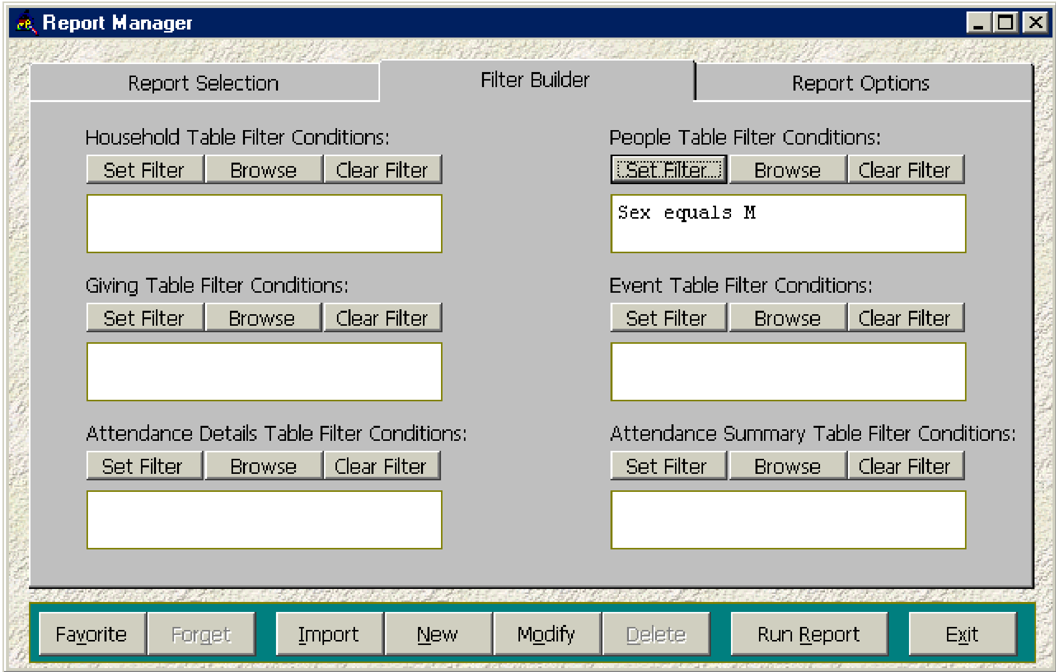


Figure 19-2 Report Manager, Filter Builder Page

Filters are not recommended for new users since you should have a good understanding of the information presented in chapter 26. **You should also be aware that data filters do not work on all reports and that some experimentation will be required**. You will also need the information presented in appendix A, table formats.

Tip: *You can produce reports for past giving years and even for membership data that was archived simply by changing the giving year on the ChurchWatch toolbar.*

To create a data filter, click any of the SET FILTER buttons. You will need to select a table that is related to the report you are trying to produce. You can then use the BROWSE/TEST button to see if your data filter has collected the records you were interested in. If you see lines of stars in the browse window do not be alarmed, this is quite normal and is simply showing you records that have been hidden by the filter. The CLEAR FILTER button is used to remove the data filter.

Note: *The word "[Filtered]", shown on the main Report Manager page, is provided to remind you that you have a filter in effect.*

Report Options

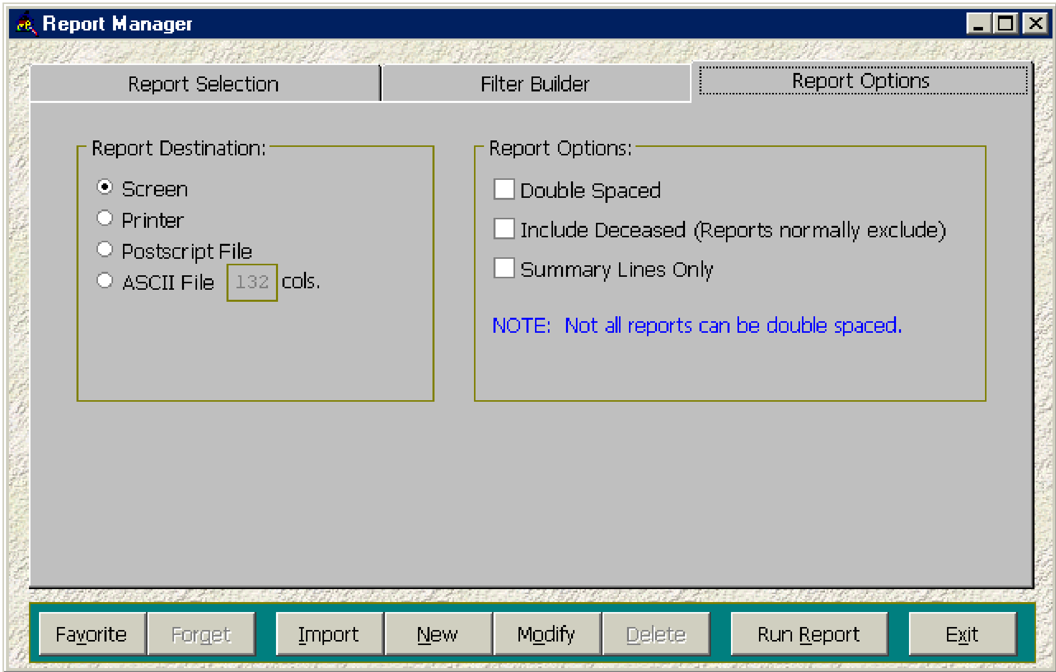


Figure 19-3 Report Manager, Report Options

The Report Options page allows you to do some simple modification of the appearance of the selected report. Table 19-1 explains each of the report options.

Report Option	Description
Destination	Choose the destination for the report. If you choose Postscript File, your printer driver must support Postscript format. If you choose ASCII file and find that the report does not fit on the page and that lines “wrap around” you will need to increase the number of columns using the box provided on this page.
Double Spaced	Check this to double space the detail lines of the report.
Include Deceased	ChurchWatch does not normally include the deceased in reports but you can override this feature by checking this box. ***Important:*** *On reports related to deceased people under the People category, this box **MUST** be checked in order to produce the report.*
Summary Only	Check this to remove the detail lines, leaving only a summary. This feature does not work on all reports but will work on most giving reports. Some experimentation will be required.

Table 19-1 Report Options

Saving Favorite Reports

Sorting through 300+ reports can be difficult even when they are already organized into categories for you. Once you find a report that is useful and that you plan to use again, you can mark it as a favorite to make finding it easier next time. To mark a report as a favorite first select it in the main list and then click the FAVORITE button. Note that the FAVORITE button then turns grey to indicate that this report is marked as a favorite. These reports can then be quickly located in the Favorites category. To remove a report from this category, go to your favorites list, select the item of interest and then click the FORGET button.

User Defined Reports

A new feature in ChurchWatch version 2 is the ability to modify the existing reports and to create new ones. One thing to note is that ChurchWatch does not actually allow you to modify the pre-defined reports. Instead, a copy is made and renamed under a new file name. This way, you can modify reports with confidence and always have the ability to go back to the original report layouts and code. There are several buttons associated with user defined reports: IMPORT, NEW, MODIFY, DELETE. Each of these functions are discussed in detail below.

Importing a Report

Your user defined reports can be shared with other users or sister churches by using the import feature. If you have a report you want to share (you are the exporter), first select the user defined report and take note of the file name shown on the main page of the Report Manager. Next copy or email the following 2 files: <filename>.FRT and <filename>.FRX. Replace <filename> with the actual name of your file. These two files make up the user defined report file and are found in the main ChurchWatch folder. If you have a network system the files are found on your server only.

If you have received files to import (you are the importer), copy the 2 report files you received (<filename>.FRT and <filename>.FRX) into the main ChurchWatch folder. If you have a network system, copy the files to your ChurchWatch server only. Next, follow these steps to import:

6. Click the IMPORT button in the Report Manager.
7. You will be prompted for a .FRX file. Locate the new <filename>.FRX file and select it. Click OK to continue.
8. On the form that follows, enter a descriptive report name, a description, and a security code if security protection is desired.
9. Click SAVE to complete the import.

Modifying Existing Reports

You can modify the existing report layouts and even the underlying code. Begin by selecting the report you want to modify. You can select a user defined report or an original ChurchWatch report. In the latter case, a copy will be made first before any modifications can be done. Click the MODIFY button to begin the modification process. The form shown in figure 19-4 will be displayed.

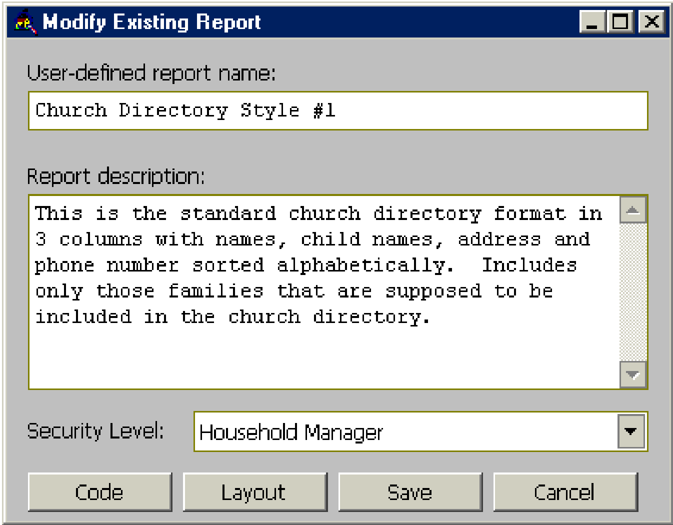


Figure 19-4 Modify Report

On the display form you have the option of changing the report name, the report description and the security level. To change the layout of the report including font type, font size and colors click the LAYOUT button. Figure 19-5 shows the resulting report writer and associated windows.

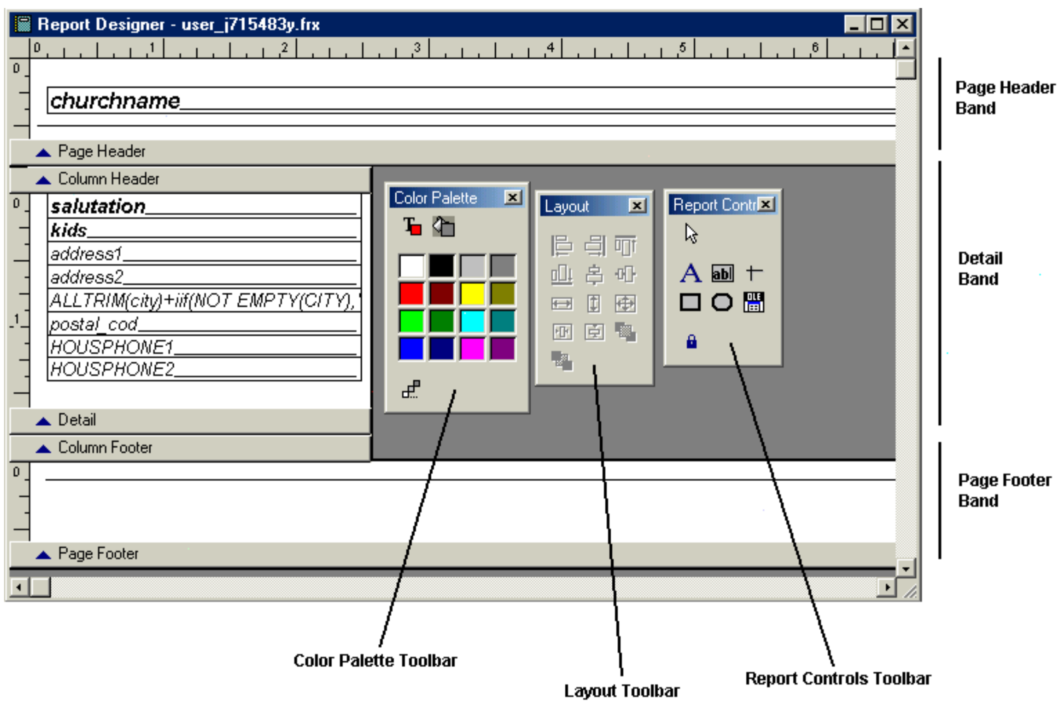


Figure 19-5 Report Designer

In addition to the Report Designer window, two new main menu items will appear on the top of screen menu: FORMAT and REPORT. These two menus contain items related to report modification.

ChurchWatch uses the Microsoft Visual Foxpro Report Designer. Use of the Report Designer is a very large topic that goes well beyond the scope of this manual. There are many excellent books available on the topic of Visual Foxpro and these should be available at a local bookstore or from amazon.com. The Foxpro Report Designer has not changed since Visual Foxpro version 3 so any book addressing VFP 3 or higher should suffice. However, there are simple changes you can make to reports without knowing much about Foxpro. Table 19-2 lists some simple changes that almost anyone can make.

Operation	How To
Resizing bands	Click on the band border and drag down or up to resize the band.
Changing the position of fields	Click and drag the field to a new location
Deleting fields	Click on a field to select it, then press the DELETE key on your keyboard.
Resizing fields	Click on a field to select it. Several anchors (squares) will appear around the field. Click on an anchor and drag to resize the field.
Changing font	Click on a field to select it. On the top of screen menu, select REPORT and then FONT. Change the font in the dialog box that appears.
Changing field contents	To change the contents and format of a field, simply double click on it. A dialog box will open to allow you to change the table field the report field is tied to. You can also change format in this dialog. Again, we recommend any book that explains the Foxpro Report Designer.
Adding objects, Adding fields	To add an object, select one of the Report Controls toolbar items and then click and drag to desired size on the report.
Aligning fields	Select the fields you want to align and then use one of the toolbar buttons on the Report Layout toolbar.
Changing colors	Select a field or report object, then select a color from the color palette toolbar.

Table 19-2 Report Operations

To exit and save the report, close the Report Designer window. Churchwatch will ask if you want to save your report changes.

Advanced users can also change the software code underneath the report. Again, this is a complex operation that requires a good understanding of programming, Visual Foxpro or xbase languages and the table formats listed in Appendix A of this manual. Programming in Visual Foxpro is a topic that also goes well beyond the scope of this manual. However, with the Report Designer and access to the code there are no limits to the reports you can create when an experienced programmer is at the helm. Feel free to browse the report code to get some idea of how the reports work.

When finished with the report modifications click the SAVE button on the form shown in figure 19-4.

Creating a New Report

Creating new reports is almost exactly the same process as modifying existing reports. The only difference is that you begin by clicking the NEW button on the Report Manager form. Typically a report consists of some code in the INIT procedure to load data and a report layout to display the results on screen or on paper. You can also add code to the DESTROY procedure in the code window if there are clean up items to take care of such as releasing public variables.

ChurchWatch Procedure Calls

There are many procedure calls build into ChurchWatch that can assist you when designing and running new reports. For example, sometimes it is necessary to retrieve some input or a selection from the operator before proceeding with the report. Table 19-3 lists the procedure calls available to you.

Procedure	Call Syntax and Description
GET_DTNM	DO FORM GET_DTNM TO <varname> <varname> = a variable name of your chosing. The date ID will be placed into this variable This form allows you to retrieve a date ID from the operator. The operator selects from the user defined date names.
GET_EVNT	PUBLIC public_event AS INTEGER DO FORM GET_EVNT WITH <type>, <future> RELEASE public_event <type> = 1 for events or 0 for classes <future> = .T. if you want to include future event dates, .F. otherwise This form allows you to retrieve an event ID from the operator. The numeric event ID is returned in the public variable public_event.
GET_NEED	PUBLIC public_need_id AS INTEGER DO FORM GET_NEED RELEASE public_need_id This form allows you to retrieve a need ID from the operator. The numeric need ID is returned in the public variable public_need_id.
GET_NUM	PUBLIC public_num AS INTEGER DO FORM GET_NUM WITH <title>, <units> RELEASE public_num <title> = Text for the prompt on the form <units> = Text for the units of measure to display on the form This form allows you to retrieve a number from the operator. The number is returned in the public variable public_num.

Procedure	Call Syntax and Description
GET_PAST	PUBLIC public_past AS STRING DO FORM GET_PAST RELEASE public_past This form allows you to retrieve a name from the “Visited By” field in the People Manager. The name of the chosen person is returned in the public variable public_past.
GET_SKIL	PUBLIC public_skill AS STRING DO FORM GET_SKIL RELEASE public_skill This form allows you to retrieve a time and talent name. The name of the time or talent is returned in the public variable public_skill.
GET_STAT	PUBLIC public_status AS STRING DO FORM GET_STAT RELEASE public_status This form allows you to retrieve a marital status name. The name of the marital status is returned in the public variable public_status.
GET_STR	PUBLIC public_str AS INTEGER PUBLIC public_case_sensitive AS BOOLEAN DO FORM GET_STR WITH <title> RELEASE public_case_sensitive RELEASE public_str <title> = Text for the prompt on the form This form allows you to retrieve a string from the operator. The string is returned in the public variable public_str. Case sensitive (.T. or .F.) is returned in public_case_sensitive.
GET2DATE	PUBLIC public_date1 AS DATE PUBLIC public_date2 AS DATE PUBLIC public_order_by_date AS BOOLEAN DO FORM GET2DATE RELEASE public_date1 RELEASE public_date2 RELEASE public_order_by_date This form allows you to retrieve two dates from the operator. The dates are returned in the public variables public_date1 and public_date2. In addition there is a checkbox on the form for “Order By Date”. The value of this checkbox (.T. or .F.) is returned in the public variable public_order_by_date.
GETACCT	PUBLIC public_acct AS STRING DO FORM GETACCT RELEASE public_acct This form allows you to retrieve a giving account name. The name of the account is returned in the public variable public_acct.

Procedure	Call Syntax and Description
GETAWARD	PUBLIC public_award_id AS INTEGER DO FORM GETAWARD RELEASE public_award_id This form allows you to retrieve a need ID from the operator. The numeric need ID is returned in the public variable public_need_id.
GETCLASS	PUBLIC public_class_id AS INTEGER DO FORM GETCLASS RELEASE public_class_id This form allows you to retrieve a class ID from the operator. The numeric class ID is returned in the public variable public_class_id.
GETDATE3	PUBLIC public_date1 AS DATE DO FORM GETDATE3 RELEASE public_date1 This form allows you to retrieve a date from the operator. The date is returned in the public variable public_date1.
GETENVNO	PUBLIC public_env_num AS INTEGER DO FORM GETENVNO RELEASE public_env_num This form allows you to retrieve an envelope number from the operator. The numeric envelope number is returned in the public variable public_env_num.
GETEVENT	PUBLIC public_event_id AS INTEGER DO FORM GETEVENT RELEASE public_event_id This form allows you to retrieve an event id from the operator. The numeric event id is returned in the public variable public_event_id.
GETGROUP	PUBLIC public_group AS STRING DO FORM GETGROUP RELEASE public_group This form allows you to retrieve a church group name. The name of the group is returned in the public variable public_group.
GETMEMB	PUBLIC public_memb AS STRING DO FORM GETMEMB RELEASE public_memb This form allows you to retrieve a membership name. The name of the membership is returned in the public variable public_memb.
GETMON1	PUBLIC public_month AS INTEGER DO FORM GETMON1 RELEASE public_month This form allows you to retrieve a numeric month from the operator. The numeric month is returned in the public variable public_month.

Procedure	Call Syntax and Description
GETMONTH	PUBLIC public_calendar_date AS DATE PUBLIC public_calendar_text AS STRING DO FORM GETMONTH RELEASE public_calendar_date RELEASE public_calendar_text This form allows you to retrieve a date and some text from the operator. This information is normally used on church calendars. The date is returned in the public variable public_calendar_date and the text is returned in the public variable public_calendar_text.
GETPERID	PUBLIC public_per_id AS INTEGER DO FORM GETPERID RELEASE public_per_id This form allows you to retrieve a person id from the operator. The numeric person id is returned in the public variable public_per_id.
GETQUART	PUBLIC selected_quarter AS INTEGER DO FORM GETQUART RELEASE selected_quarter This form allows you to retrieve a numeric date quarter (1-4) from the operator. The numeric quarter is returned in the public variable selected_quarter.
MAKEKIDS	DO MAKEKIDS This procedure makes a table containing a string of child names for each family. Table fields and formats are: FAMILY_ID Numeric family id assigned by ChurchWatch KIDS A string listing children (Sally, Tommy, Peter)
MAKESALU	DO MAKESALU This procedure makes a table called SALU which contains salutation strings for all families. Table fields and formats are: FAMILY_ID Numeric family id assigned by ChurchWatch FAMILY_NAM Family name (Smith) SALUTATION Salutation string (Smith, Joe and Helen) ANNIV Couples anniversary date FIRSTNAME First name of main contact of household (Joe) LASTNLAST Salutation in last name last format (Mr. Joe and Mrs. Helen Smith) BYTITLE Salutation with titles (Mr. and Mrs. Joe)
MKSALU2	DO MKSALU2 This procedure is exactly the same as the MAKESALU procedure by MKSALU2 strips all titles from all strings.
PICTFAM	PICTFAM(FAMILY_ID AS INTEGER) Returns a string representing the full path to the photo file for the given family (specified by family_id).

Procedure	Call Syntax and Description
PICTPEOP	PICTPEOP(PER_ID AS INTEGER) Returns a string representing the full path to the photo file for the given person (specified by per_id).
PICTRES	PICTRES(RES_ID AS INTEGER) Returns a string representing the full path to the photo file for the given resource (specified by res_id).
TBL_CHK	DO TBL_CHK This procedure writes all buffered data to the database tables.

Table 19-3 ChurchWatch Procedure Calls

In addition to the ChurchWatch procedure calls listed above, there are some Visual Foxpro procedure calls listed in the next chapter, Query Manager. However, for exact syntax and explanations you will need the Visual Foxpro Developer's Reference or a good book on Visual Foxpro. There are also internet web sites and newsgroups dedicated to Visual Foxpro and lots of good information is available there.

Deleting a User Defined Report

Only user-defined reports can be deleted. Select the report you want to delete and then click the DELETE button.

What To Do If The Report You Need Is Not Listed...

Naturally, we didn't think of every report that might be useful to you. If you need a report that is not listed and you are not comfortable or able to create your own reports, White Mountain Software can create the report for you for a small hourly fee. New reports typically take less than one hour to create so the costs can be quite reasonable for important reports you need.

Ownership of new reports remains with White Mountain Software and will be included in future versions of the software.

Contact White Mountain Software for current pricing.

Chapter 20 - The Query Manager and SQL Queries

The power and speed of the Query Manager to retrieve data from your ChurchWatch databases is rather astounding. Queries are a way to specify what you want to retrieve from the database tables without telling ChurchWatch how to do it. Virtually any combination of data can be retrieved making this a great way to retrieve data that is not covered in the existing reports and to create interesting reports and statistics.

The Query Manager is included for advanced users who understand the Structured Query Language (SQL) used by most relational databases. The Query Manager is not intended for new users or those not comfortable with SQL. However, the language is fairly simple to learn and understand so if you like a challenge try some experimentation in the Query Manager. You cannot damage any data by using the Query Manager so experimentation is safe.

SQL is a broad topic that covers entire books. If you would like to learn more about SQL, your local bookstore will have many books related to this subject. This chapter covers SQL only in minimal detail. A book covering Microsoft Visual Foxpro would also be useful since SQL queries can be combined with Visual Foxpro functions.

First lets look at the Query Manager form.

The Query Manager Form

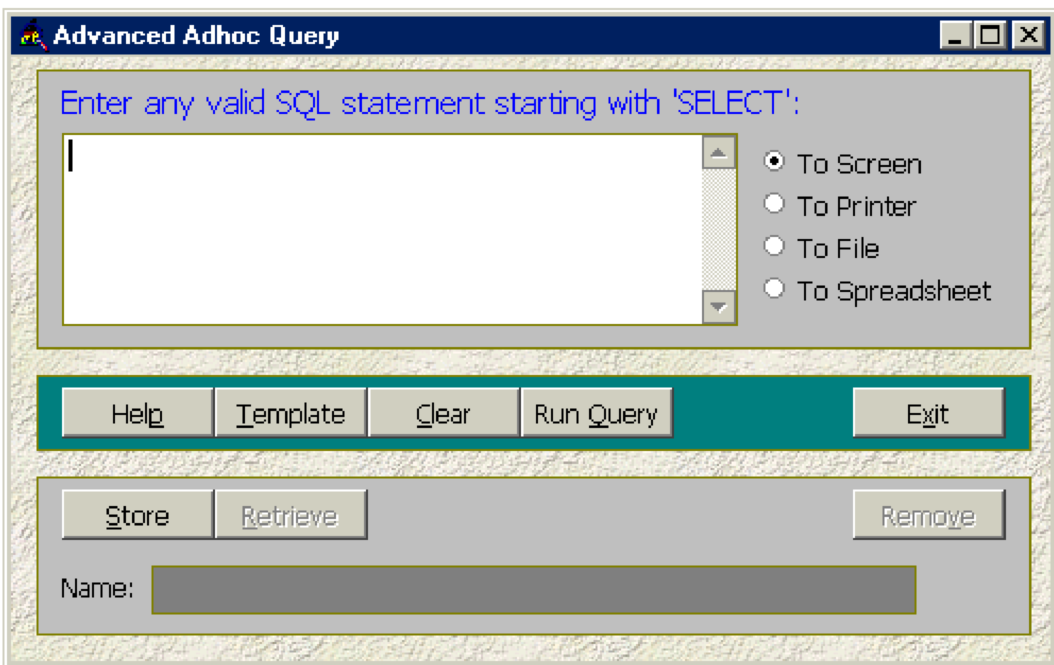


Figure 20-1 The Query Manager

The Query Manager form is fairly straight forward. There is an edit window to type queries into, buttons for running and clearing the query and buttons related to saving, restoring and deleting queries.

In addition several report destinations can be selected. Note that if you chose the FILE destination ChurchWatch will create an ASCII text file (.TXT) with your query results. Text files are handy for cutting and pasting the query results into another Windows (tm) application.

Table 20-1 explains each of the buttons on the form:

Button	Description
Help	Click this to view the ChurchWatch table and field definitions. You will need this detailed information to formulate a query. You can also refer to Appendix A of this manual.
Template	Click this button to paste a helpful query template into the edit window.
Clear	Click this button to clear the edit window.
Run Query	Click this button to run your query.
Exit	Click this button to exit the Query Manager.
Store	Click this button to save your query for use at a later date.
Retrieve	Click this button to retrieve a saved query.
Remove	Click this button to delete a saved query.

Table 20-1 Query Manager Buttons

Running a Query

To run a query, simply type the query command into the edit window and then click the RUN QUERY button.

Runaway Queries

If you make a mistake in your query you can cause a query that “runs away” and creates MASSIVE amounts of data. You can, in fact, run out of disk space if this occurs. ChurchWatch uses an extremely fast database engine and most queries will complete and be displayed as quick as you can click the RUN QUERY button. If your query runs for more than a few seconds you may be able to cancel it by pressing the ESC key, although ChurchWatch will likely shutdown.

Tables With Protected Access

The Query Manager respects the administrator set security levels for each user. You cannot query data from tables you are not permitted access to. Contact your ChurchWatch administrator if you need increased access rights.

Storing and Retrieving Queries

Once you have your query working properly you can save it for later use. You can also retrieve or delete saved queries using the buttons already explained. When you click on the STORE button, the form shown in figure 20-2 is displayed. Enter a descriptive name for the query and a description of what it does. Finally click the SAVE button.

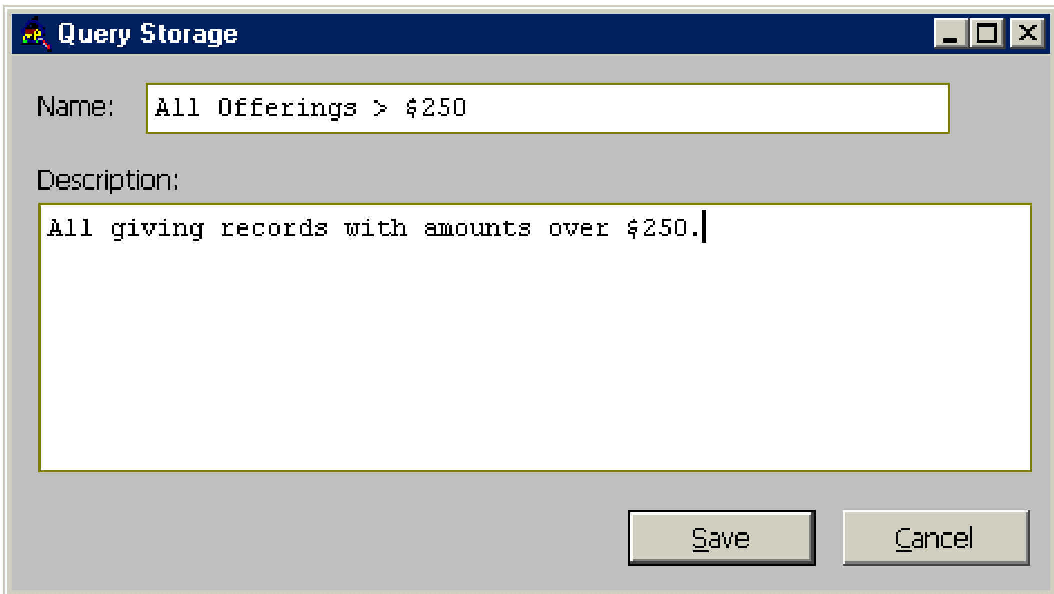


Figure 20-2 Storing a Query

SQL Queries

So what is SQL anyway and what does a query look like? SQL stands for Structured Query Language and is a standard query language used in most relational databases. The details of SQL are beyond the scope of this user's manual but the basic syntax of a query is as follows:

SELECT <fields> FROM <tables> WHERE <conditions> <options>

The query begins with the "SELECT" keyword followed by the fields you want to retrieve from the database tables. You will need to refer to Appendix A of this manual to get the exact field names for use in the query. You can also use the asterisk character ('*') as a wildcard to indicate "retrieve all fields".

Example:

SELECT first_name, family_nam, birthdate

Another Example:

SELECT * (Retrieves all fields)

Next you add the keyword “FROM” and then list the table or tables that are involved in the query. Again, you will need to refer to appendix A of this manual for the valid table names.

Example:

SELECT first_name, family_nam, birthdate
FROM people

Now you can filter the results of the query with an optional “WHERE” keyword and conditions. The WHERE conditions are optional and need only be used if you want to reduce the query results.

Example

SELECT first_name, family_nam, birthdate
FROM people
WHERE birthdate >= {1959.01.01}

The above example will find all people who where born in 1959 or later. Note that the curly brackets are used to indicate a date. The date format must be in the format you have selected on the SETUP form. More on this later.

Finally, you can add some options to the query such as storing the results in a cursor (*) for use on a subsequent query (sometimes queries take more than one statement). You could also specify the sort order or group order. Again, a book on SQL will cover this in more detail. Here is a partial list of options you can use:

ORDER BY <fieldname>[,<fieldname>...]	Specifies a sort order for the results
GROUP BY <fieldname>[,<fieldname>...]	Specifies a data grouping
HAVING <filter condition>	Sets a filter condition for the results
UNION <another SQL query>	Combines two or more query results
INTO <[TABLE] table or cursor name>	Specifies that the results should be placed in a table or cursor(*)

(*) A cursor is just a temporary table storage area.

Technical Syntax

Here is the complete technical description of the SQL SELECT syntax that the Query Manager will support:

```
SELECT [ALL | DISTINCT] [TOP nExpr [PERCENT]]
        [Alias.] Select_Item [AS Column_Name]
        [, [Alias.] Select_Item [AS Column_Name] ...]
FROM [FORCE]
        Table [Local_Alias]
        [[INNER | LEFT [OUTER] | RIGHT [OUTER] | FULL [OUTER] JOIN
                DatabaseName!]Table [Local_Alias]
                [ON JoinCondition …]
[PREFERENCE PreferenceName]
[WHERE JoinCondition [AND JoinCondition ...]
        [AND | OR FilterCondition [AND | OR FilterCondition ...]]]
[GROUP BY GroupColumn [, GroupColumn ...]]
[HAVING FilterCondition]
[UNION [ALL] SELECTCommand]
[ORDER BY Order_Item [ASC | DESC] [, Order_Item [ASC | DESC] ...]]
[INTO [CURSOR | TABLE] alias]
```

Where:

[]	Indicates an optional item
|	Means “or”. Any one of the items can be used.
Alias	Table or cursor name

Visual FOXPRO Built-In Functions and Operators

You can combine the built-in functions and operators of Visual Foxpro into the queries you create. A book on Visual Foxpro will give a complete list of the functions built into foxpro but here are some of the more useful ones:

Function	Description
Logical Functions:	
( )	Mathematical grouping (to override precedence).
=	Equals, matches
#, <>, !=	Does not equal
>	Greater than
<	Less than
>=	Greater than or equal
<=	Less than or equal
==	Exactly matches

Function	Description
%	Remainder
AND	Logical AND
OR	Logical OR
!, NOT	Logical Negation
.T.	Logical TRUE
.F.	Logical FALSE
EMPTY()	Returns TRUE if field is empty
BETWEEN(,)	Returns TRUE if field is between the two fields given. For example: WHERE AMOUNT BETWEEN(250,300)
DELETED()	Returns TRUE if a record is marked deleted
Date Functions:	
{1999.01.01}	This is how you specify a date for a field of type date. You will need to use the date format chosen in the SETUP form.
BETWEEN(,)	Returns TRUE if the date is between the dates given (inclusive). For example: WHERE BIRTHDATE BETWEEN({1963.01.01},{1973.01.01})
CDOW()	Returns the character day of the week from a date or datetime field. (e.g. “Sunday”)
CMONTH()	Returns the character month (e.g. “July”) from a date or datetime field.
CTOD()	Converts a character to a date. (e.g. CTOD(“1999.01.01"))
CTOT()	Converts a character to a datetime. (e.g. CTOT(“1999.01.01 12:30 PM”))
DATE()	Returns the current date in date format.
DATETIME()	Returns the current date and time in datetime format.
DAY()	Returns the number day from a date.
DOW()	Returns the day of the week from a date or datetime field. Sunday is day 1.
DTOC()	Converts a date to a character field.
DTOS()	Converts a date to a string in the format yyyyddmm
DTOT()	Converts a date field to a datetime field.
HOUR()	Returns the hour from a datetime field.
MINUTE()	Returns the minute portion from a datetime field.
MONTH()	Returns the numeric month from a date or datetime field.
SEC()	Returns the seconds portion from a datetime field.
SECONDS()	Returns the seconds elapsed since midnight.

Function	Description
TIME()	Returns the current time.
TTOC()	Converts a datetime field to a character string.
TTOD()	Converts a datetime field to a date field.
WEEK()	Returns the numeric week-of-the-year from a date or datetime field.
YEAR()	Returns the year portion of a date or datetime field.
Math Functions:	
AVG()	Return the average value of a field. (e.g. SELECT AVG(AMOUNT) FROM ...)
COUNT()	Return the number of records matching the query conditions.
MAX(,)	Returns the maximum of two given values.
MIN(,)	Returns the minimum of two given values.
ROUND()	Rounds a number.
SUM()	Returns the sum of a field. (e.g. SELECT SUM(AMOUNT) FROM ...)
VAL()	Returns the numeric value of a character string.
String (Text) Functions:	
ASC()	Returns the ASCII code of a character.
ALLT()	Remove all leading and trailing blanks from a string.
AT()	Returns the position of the first occurrence of a character expression within another character expression or field counting from the leftmost character. You can also optionally specify which occurrence. AT(cSearchExpression, cExpressionSearched [,nOccurrence])
ATC()	Same as AT() but without respect to case.
CHR()	Returns as character based on an ASCII code.
LEN()	Returns the length of the specified field.
LOWER()	Converts a field to lower case.
MAX(,), MIN(,)	Returns the maximum or minimum string (e.g. “A” is less than “B”)
OCCURS(,)	Returns the number of times a character expression occurs in the given field: OCCURS(cSearchExpression, cExpressionSearched)
PADL, PADR, PADC()	Returns a string padded with blanks on the left (PADL), right (PADR) or both sides (PADC). You can also specify the padding character (default is space). PADL(eExpression, nResultSize [,cPadCharacter])
SOUNDEX()	Returns a phonetic representation of the specified character field.

Function	Description
SPACE()	Returns a character string of the specified length filled with spaces.
STR()	Converts a numerical value to a string.
STRTRAN()	Searches a character field for occurrences of a second character expression and then replaces each occurrence with a third character expression. STRTRAN(cSearched, cSearchFor, cReplacement)
STUFF()	Returns a character string created by replacing a specified number of characters in a character expression with another character expression. STUFF(cExpression, nStartReplacement, nCharactersReplaced, cReplacement)
SUBSTR()	Returns a portion of a string from a given character field. SUBSTR(cExpression, nStartPosition, nCharactersRetrieved)
UPPER()	Converts a character field to upper case.

Table 18-2 Microsoft Visual Foxpro Functions (Partial Listing)

Example Queries

Here are some example queries you can experiment with:

Select everyone from the people database:

```
SELECT *
        FROM PEOPLE
```

Select any offering record greater than or equal to $250:

```
SELECT *
        FROM GIVING
        WHERE AMOUNT >= 250
```

Do it again but only select the person's name, the account and the amount:

```
SELECT FIRST_NAME, FAMILY_NAM, ACCOUNT, AMOUNT
        FROM GIVING
        WHERE AMOUNT > 250
```

Now remove dates prior to July 1st:

```
SELECT FIRST_NAME, FAMILY_NAM, ACCOUNT, AMOUNT
        FROM GIVING
        WHERE AMOUNT > 250 AND DATE_GIVEN > {1999.07.01}
```

Repeat the last two queries using an intermediate cursor:

```
SELECT FIRST_NAME, FAMILY_NAM, ACCOUNT, AMOUNT
        FROM GIVING
        WHERE AMOUNT > 250
        INTO CURSOR TEMP_CURSOR
```

```
SELECT *
        FROM TEMP_CURSOR
        WHERE DATE_GIVEN > {1999.07.01}
```

Note:	*To do 2 queries you must type in one at a time and run each separately.*

Now do it again but sort on the giving date (date_given field) in ascending order.

```
SELECT FIRST_NAME, FAMILY_NAM, ACCOUNT, AMOUNT
        FROM GIVING
        WHERE AMOUNT > 250 AND DATE_GIVEN > {1999.07.01}
        ORDER BY DATE_GIVEN
```

Descending order would be done like this:

```
SELECT FIRST_NAME, FAMILY_NAM, ACCOUNT, AMOUNT
        FROM GIVING
        WHERE AMOUNT > 250 AND DATE_GIVEN > {1999.07.01}
        ORDER BY DATE_GIVEN DESCENDING
```

Find all people born on a Sunday:

```
SELECT FIRST_NAME, FAMILY_NAM
        FROM PEOPLE
        WHERE DOW(BIRTHDATE) = 1
```

Get the average offering amount for each giving account and sort by account:

```
SELECT ACCOUNT, AVG(AMOUNT)
        FROM GIVING
        GROUP BY ACCOUNT
        ORDER BY ACCOUNT
```

When searching for character strings and exact match is not necessary. To find all families whose last name starts with "Sm" do this (use the UPPER function to ignore case):

```
SELECT * FROM HOUSE
        WHERE UPPER(FAMILY_NAM) = "SM"
```

If an exact match is needed in the character string use two equal signs and the ALLT (trim all blanks) function:

```
SELECT * FROM HOUSE
        WHERE UPPER(ALLT(FAMILY_NAM)) == "SMITH"
```

Single or double quotes can be used:

```
SELECT * FROM HOUSE
        WHERE UPPER(ALLT(FAMILY_NAM)) == 'SMITH'
```

Complex Queries Using "Joins"

Suppose you have to find all people with a birthday in June and retrieve only their address information. This is a complex query that requires us to "join" two tables (House and People) since the birthday information is in the People table but the address information is in the House table. To join two tables you must find a field that is the same in both, in this case the family_id field. Here's how it works:

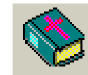
```
SELECT HOUSE.*
        FROM PEOPLE, HOUSE
        WHERE MONTH(BIRTHDATE) = 6 AND
                HOUSE.FAMILY_ID = PEOPLE.FAMILY_ID
```

The part underlined above is called the join condition since it sets the condition that joins the two tables together. In this case the family_id field must be the same in both tables in order to combine the records.

You can join as many tables as you like.

As you can see from the above examples the possibilities are limited only by your imagination. Experiment with the Query Manager and see what you can come up with.

Chapter 21 - The Bible Manager



The Bible Manager is included in ChurchWatch at no extra cost. The Bible Manager can't compete with "true" Bible Management Software but it does give you several translations and the ability to search and copy text into other Windows applications. You can also open multiple copies of the Bible Manager in order to compare translations. Several public domain bible translations are included:

- American Standard Version (1901)
- Darby
- King James Version
- Webster
- Young's Literal Translation

Warning:	*Each of these have been taken from the public domain and no attempt has been made to authenticate them so use them at your own risk.*

The Bible Manager Form

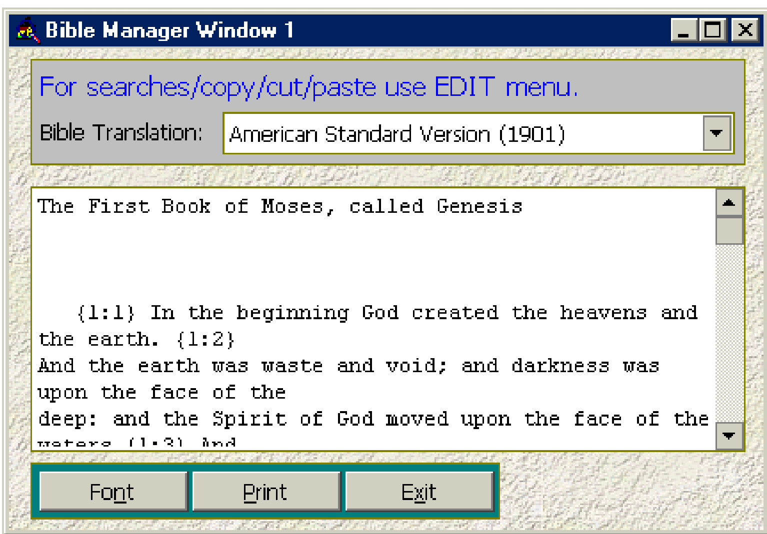


Figure 21-1 The Bible Manager

Selecting a Translation and Changing the Format

Use the "pulldown" list to select a translation. You can change the size of the window as desired. You can also change the font to something comfortable by clicking the FONT button. You can also open more than one copy of the Bible Manager in order to compare translations.

Searching, Copy and Paste

The edit window containing the bible's text is read-only but you can click and drag your mouse to select a passage. Then use the EDIT menu at the top of the screen to select COPY (CTRL-C also works as a shortcut). You can copy and paste the text into any other Windows application such as a sermon in a word processor.

To search for a character string in the text first click inside the edit window to make sure it's active and then select the EDIT menu at the top of the screen and select FIND or just press CTRL-F as a shortcut. Then enter the text you want to find and click the FIND NEXT button.

Note that the usual Windows operations such as SHIFT-CLICK to quickly select a block of text work inside the edit window. You can also select all text by choosing EDIT-SELECT ALL from the menu at the top of the screen.

Tip:	*Your insertion point must be inside the edit window for search and copy operations to work. Click inside the edit window to move the insertion point.*

Printing Selected Text

You can send passages to the printer by first selecting the text you want to print (click and drag the mouse) and then by clicking the PRINT button.

Chapter 22 - The Hymn Manager

The Hymn Manager is very unique to ChurchWatch and nearly 700 hymns are included! The Hymn Manager gives you the ability to search, copy and add hymns into other Windows applications. You can also open multiple copies of the Hymn Manager. You can even add your own lyrics.

Warning:	*All hymns have been taken from the public domain and no attempt has been made to authenticate or proof-read them. Use them at your own risk.*

The Hymn Manager Form

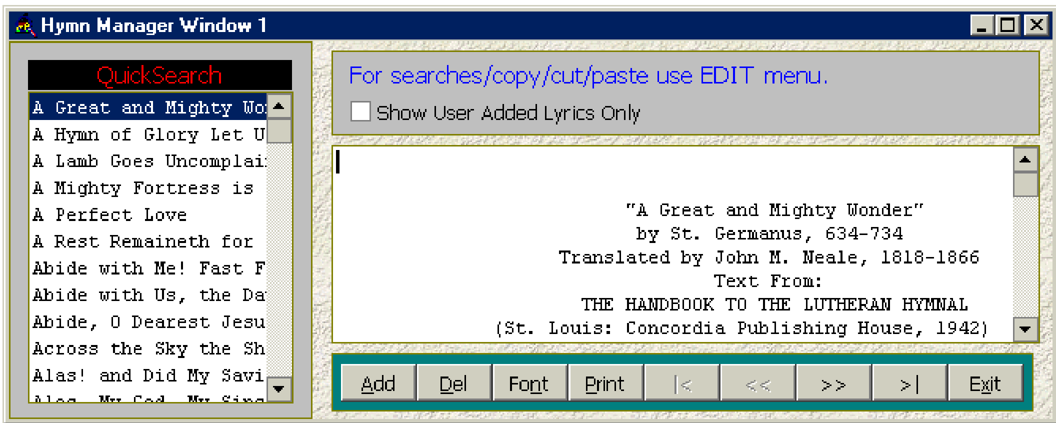


Figure 22-1 The Hymn Manager

Form Items

Table 22-1 lists the form items on the Hymn Manager form.

Form Item	Description
QuickSearch List	Find and select a hymn of interest in this list.
Show User Added Lyrics Only	Check this box to show only user added lyrics in the QuickSearch.
Edit Window	This window shows the lyrics.
Add	Click this button to add a new hymn or song.
Del	Click this button to delete the current hymn or song.
Font	Click this button to change the font in the edit window.
Print	Click this button to print the selected text in the edit window. ***Tip:*** *To print an entire hymn quickly select EDIT-SELECT ALL and then click the PRINT button.*
|<	Click this button to go to the first hymn.
<<	Click this button to go back one hymn.
>>	Click this button to go forward one hymn.
>|	Click this button to go to the last hymn.
Exit	Click this button to exit the Hymn Manager.

Table 22-1 Hymn Manager Form Items

Searching, Copy and Paste

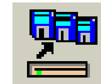
The edit window containing the hymn's text is read-only but you can click and drag your mouse to select text. Then use the EDIT menu at the top of the screen to select COPY (CTRL-C also works as a shortcut). You can copy and paste the text into any other Windows application (a great way to create overheads).

To search for a character string in the text, first click inside the edit window to make sure it's active, and then select the EDIT menu at the top of the screen and select FIND or just press CTRL-F as a shortcut. Then enter the text you want to find and click the FIND NEXT button.

Note that the usual Windows operations such as SHIFT-CLICK to quickly select a block of text work inside the edit window. You can also select all text by choosing EDIT-SELECT ALL from the menu at the top of the screen.

Tip: *Your insertion point must be inside the edit window for search and copy operations to work. Click inside the edit window to move the insertion point.*

Chapter 23 - The Backup Manager



ChurchWatch provides a Backup Manager which manages saving a copy of your ChurchWatch data to a safe location. You can backup to any writeable destination such as floppy disks, hard drives, removeable hard drives, tape backup systems etc. Any writeable device which has been assigned a drive letter (e.g. A:) in Windows can be used as a backup device.

Since the tables in ChurchWatch are inter-related, the Backup Manager makes a "snapshot" of all your tables. You cannot backup or restore selected tables, the entire database system must be saved (and restored if necessary).

The Backup Manager backs up the current church only. If you have a multi-church installation, you will need to backup each church individually. In addition, you should do all church backups at the same time since the "sub-churches" use some tables from the main church. Backing up all churches at the same time is necessary to avoid missing important data.

Backup Strategy

Why do backups? The answer is obvious, yet somewhere every day data is lost because someone neglected to do a backup. Computers and disk drives are not immortal - they WILL fail at some point. Your data represents a significant time investment and should be protected accordingly. You should assign one or more people to be responsible for making **daily** backups. You should also put a policy in place to rotate your backup media (disks, tapes etc). A good strategy is to have a different media for each day covering two weeks. At the end of two weeks you would begin again and so on. Another important strategy is to store some backups off-site in case of fire or other disaster. Still another good idea is to do a monthly backup that is never erased and store it off site. **We cannot stress enough how important it is to have a good backup policy in place and to stick to it - it's your responsibility.**

Important: *Rotate your backup media and store at least some of them off-site.*

What the Backup Manager Does

The Backup Manager is simply a copy manager, although it also has the capability to compress files. It copies all database files with the following type extensions from the main or sub church folder:

*.DBF	Database tables
*.CDX	Index files
*.FPT	Memo (text) files

Sub-church folders are found directly under the main ChurchWatch folder. The Backup Manager also copies ALL files from the following folders found under the main or sub church folder:

ARCHIVE	Past giving years archived data
PHOTOS	Photo files
SIGS	Digital Signatures

In fact, you could do your own backup by simply copying the above files to a safe location or you could write your own backup software. You could also use third-party backup software and schedule the above files for back up each night.

The Backup Manager will remember the date and time of the last backup. In addition it can backup the giving archive folder and gives you the option of skipping system files.

Note: *Because the Backup Manager just copies files, if a single file does not fit on the destination media, the Backup Manager will display an error and stop. This problem would likely show up in large churches that backup to a floppy drive.*

Using Floppies

The Backup Manager will support copying files to a floppy disk but we do not recommend this practice for several reasons:

10. Floppies are notoriously unreliable
11. Backing up to floppy drives is very slow
12. If a single file is too large to fit on a single floppy, the Backup will fail. The Backup Manager will not split files across disks.
13. You will probably need several floppies and must keep them in order.

We recommend the purchase of a tape backup or removable disk system as these can be purchased at a reasonable price and are far more reliable, much faster and can store an entire backup on one disk or tape.

The Backup Manager Form

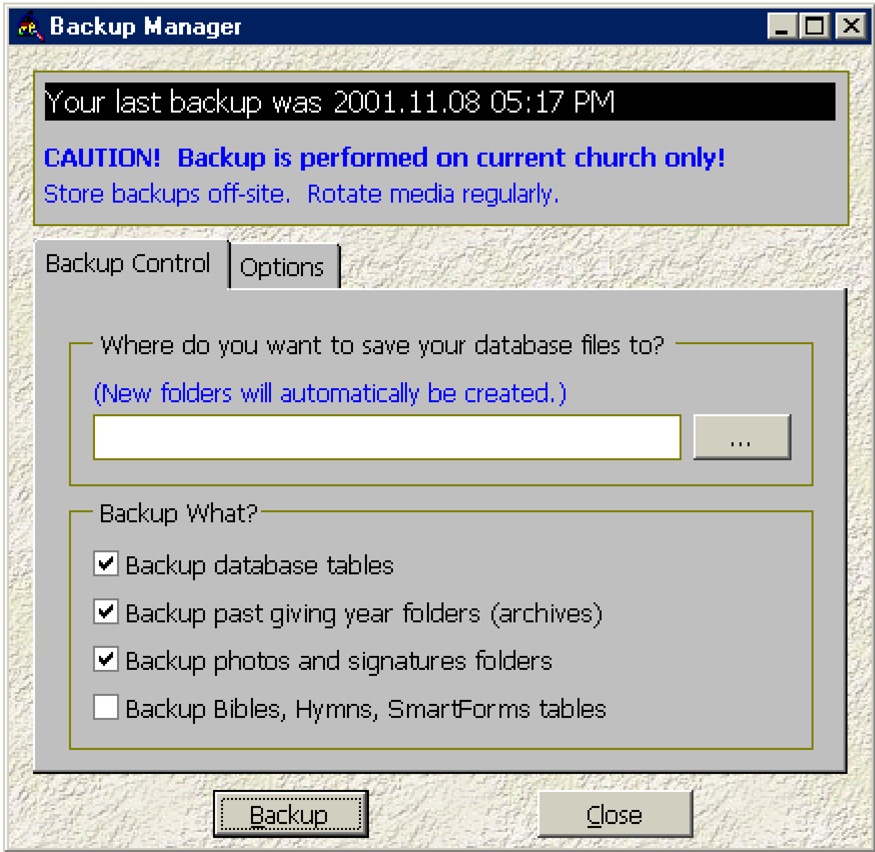


Figure 23-1 The Backup Manager

To Perform a Backup

STEP 1 Select the destination folder for the backup if the default is not suitable. You can use the "..." button to browse.

STEP 2 Set the options. Refer to table 23-1.

STEP 3 Click the BACKUP button to start the backup.

Setting the Default Backup Folder

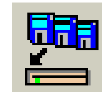
To save time you can set a default backup folder in the SETUP form under the MAINTENANCE page. Each time the Backup Manager is opened, this default folder is loaded as the backup destination. You can change it on the Backup Manager form as required.

Table 23-1 lists the form items on the Backup Manager form.

Form Item	Description
PAGE 1	
Backup Folder Name	Enter the path name to the folder where you want the backup files saved to.
...	Click this button to help set the backup folder.
Backup Database Files	Check this to backup all database tables. Normally leave this checked.
Backup Past Giving Year Folders	Check this if you want to backup the ARCHIVE folder.
Backup Photos and Signatures Files	Check this if you want to backup the PHOTOS and SIGS folders.
Backup Bibles, Hymns, SmartForms Tables	Check this if you want to backup “system” tables. Normally this is not necessary since these tables can be reinstalled or rebuilt.
PAGE 2	
Compress Files	Check this to compress all files into a single .ZIP file. This can save considerable disk space but will not work well with floppy disk backups since the backup will not split files across disks.
Delete Contents of Backup Folder	Check this to delete the backup folder contents before copying any new files into the folder.
Erase Floppy Disks Completely	Check this to erase floppy disks before copying any files. Works only on drives A: and B:.
Display Information Messages and Warnings	Check this if you want the Backup Manager to warn you of problems. When doing automatic or timed backups, this should be unchecked.
Shut Program Down When Backup is Complete	Check this if you want ChurchWatch to shut down automatically when the backup is complete.
Initially Delay Backup For	You can set an initial backup delay with this item. This is useful to doing automatic backups at night or after hours.
Repeat Backup Every	You can also setup the Backup Manager to do periodic automatic updates. Set the timing with this item.

Table 23-1 Backup Manager Form Items

Chapter 24 - The Restore Manager



ChurchWatch provides a Restore Manager to complement the Backup Manager. The Restore Manager is used to copy all files from a previously stored backup, thus restoring ChurchWatch to the state it was in at the time of the Backup. You should carefully follow the backup strategies discussed in chapter 23. <u>You can only restore to the current church.</u> ChurchWatch will warn you if you try to restore data from one church to another.

Note: *The Restore Manager copies ALL files from the specified source folder.*

The Restore Manager Form

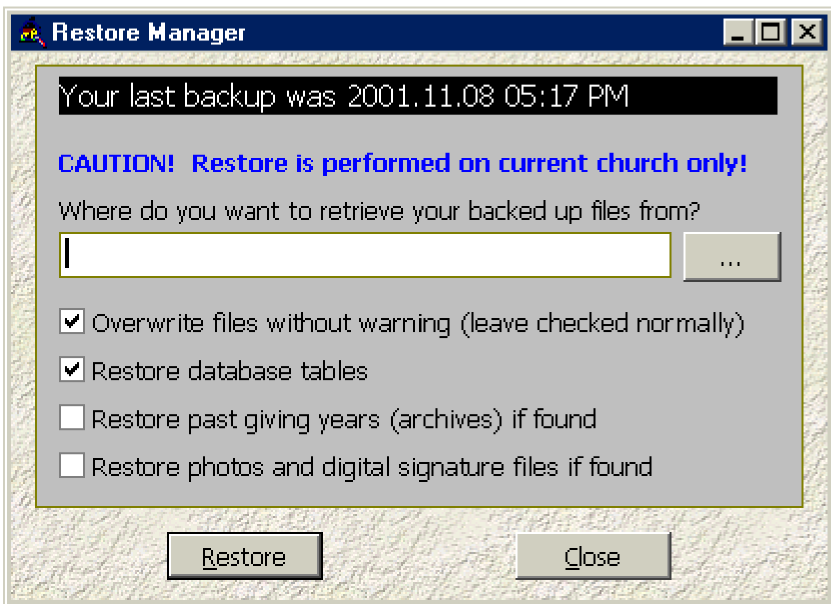


Figure 22-1 The Restore Manager

To Perform a Restore

STEP 1 Set the source folder. Use the "..." button to browse. If using floppy disks make sure disk #1 is in the drive.

STEP 2 Set the options. They are self-explanatory.

STEP 3 Click the RESTORE button to copy all files from the source folder you specified into the current church's folder.

Chapter 25 - The Phone Dialer

The Phone Dialer form is a handy phone book and auto-dialer. To use the phone dialer you will require an analog phone line and a TAPI compliant analog modem. Check with your phone company to make sure your phone system is not digital. You will also need a phone! ChurchWatch version 2 now uses TAPI compliant dialing to be compatible with a wide range of modems and Windows operating systems.

The Phone Dialer permits you to quickly dial any phone number stored in ChurchWatch. In addition you can add new phone numbers to the phone book as well as set up to six speed dials.

Hardware Connections

To effectively use the phone dialer you will need to connect a phone to your modem. Any analog phone will do. The phone is not required for dialing, only for speaking. Connections should be made as follows:

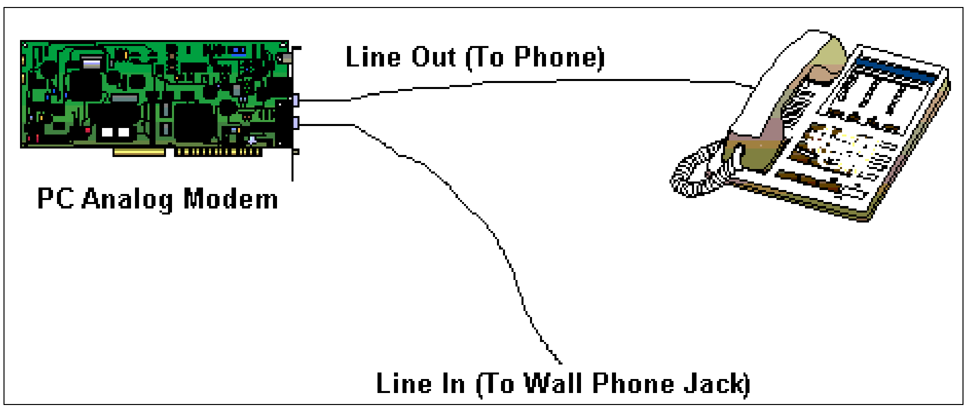


Figure 25-1 Modem and Phone Connections

The Phone Dialer Form

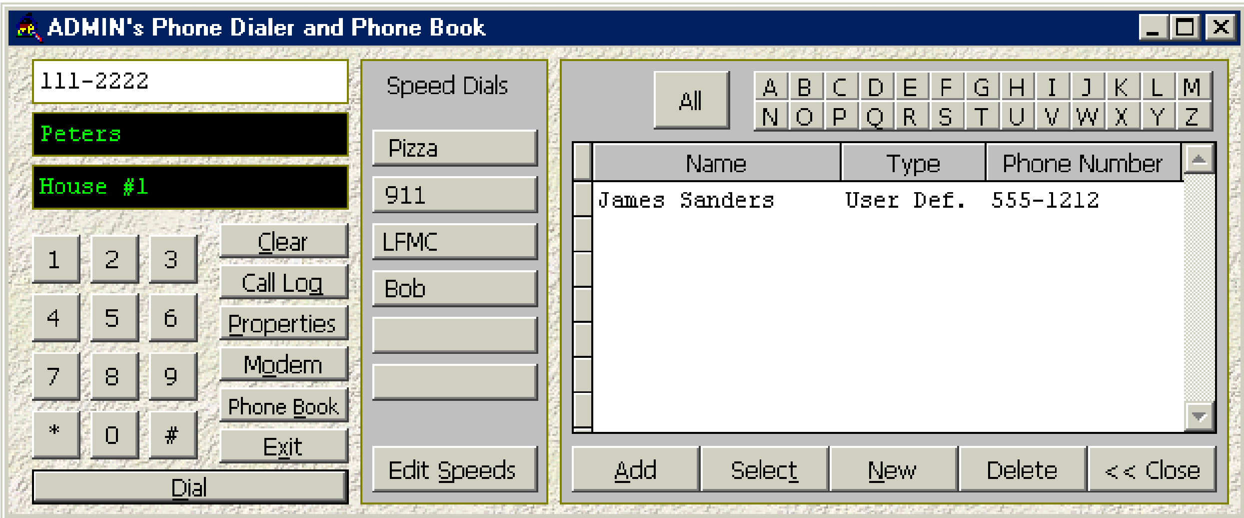
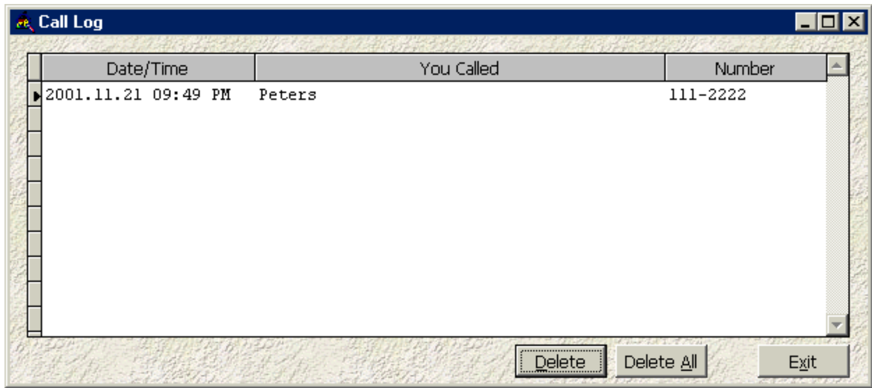


Figure 25-2 Phone Dialer Form

You can display the Phone Dialer by clicking one of the DIAL buttons on the Household or People Manager forms. You can also access the Phone Dialer from the main menu under FORMS or from the main ChurchWatch toolbar. Table 25-1 explains each item on the Phone Dialer Form.

Form Item	Description
Fields in Top Left	These fields display the current name and current number being or about to be dialed.
Numeric keypad	Click the numbers on the “phone pad” to enter a phone number directly. Note that you can also place the mouse cursor in the top field and type in a new number from your keyboard.
Clear	Click this button to clear the current name and number.

Form Item	Description
Call Log	Click this button to access your call log. The present version of ChurchWatch is not capable of storing call times but does record who you called and when. 
Properties	Click this button to setup your dialing properties such as location, call waiting, dialing prefixes etc.
Modem	Click this button to select and setup your modem.
Phone Book	Click this button to display your phone book. Each user of ChurchWatch has their own personal phone book. You cannot see the phone numbers stored for other users.
Exit	Click this to exit the Phone Dialer.
Dial	Click this button to dial the current number.
Speed Dials	Click any of the speed dial buttons to immediately dial the number stored for the speed dial.
Edit Speeds	Click this button to edit the names and numbers stored under each speed dial button.
ALL	Click this to clear the current phone book filter and display all stored numbers.
A, B, C...	Click a letter button to reduce the visible phone book entries to only those that start with the selected letter.
Add	Click this button to add the current name and number to your phone book. To create a new entry use the NEW button instead.
Select	Select a row in the phone book and then click this button to make the entry the current name and number. Double clicking an entry in the phone book has the same effect.
New	Click this button to create a new phone book entry from scratch. After entering the name for the phone book entry, click on the phone number field and enter a phone number.
Delete	Select a row in the phone book and then click this button to delete it. Pressing the delete key on your keyboard has the same effect.

Form Item	Description
Close	Click this button to close the phone book.

Table 25-1 Phone Dialer Form Items

Dialing a Number

Once you have dialed a number, you need to pick up the phone and wait for the party to answer. Don't pick up the phone until the modem has finished dialing.

Tip: *The DIAL buttons in the Household and People Managers, simply display the Phone Dialer. Click DIAL in the Phone Dialer to dial the phone.*

The Phone Book

Each user of ChurchWatch has a phone book. You can store personal numbers here and then quickly dial them with the phone dialer. The people and phone numbers in your phone book do not have to be people stored in the church membership database. When the Phone Dialer is first displayed, the phone book may be hidden. Click the PHONE BOOK button to display it and once it is open you can click the CLOSE button to close it again. The phone dialer form is sizable if you need to see more phone book entries. You can also double click any entry in the phone book to make it the current number, then click the dial button.

Chapter 26 - Data Filtering

Data filtering is probably the single most powerful feature of ChurchWatch once you understand how to build a data filter. Data filters can be as simple or as complex as you want. Carefully read and study this chapter.

To put it simply, the purpose of a data filter is to reduce the view of a set of data. For example, instead of having a view of all people in the church database, perhaps all you are interested in is “men who were born this month”. Or suppose the pastor walks into your office and asks you for a simple listing of all women who gave an offering last month. You could do it with a ChurchWatch report but you might have to sift through alot of data that also includes men. By using a data filter and a QuickReport in the People Manager, you could retrieve this information before the pastor can leave your office!

Data filters are used in the Household Manager, the People Manager, the Giving Manager, the Report Manager, the Export Manager and in many other places throughout ChurchWatch. For this reason, understanding how data filters work and how to build one will make you a much more efficient ChurchWatch user. Figure 26-1 gives a simple example of a data filter.

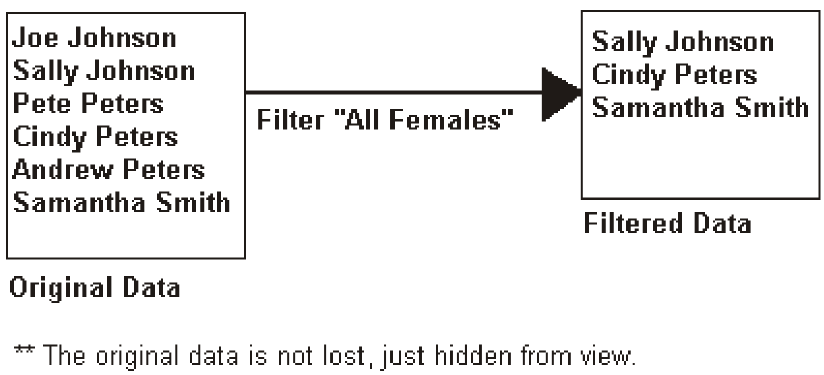


Figure 26-1 An Example of a Data Filter

Stonefield Query

ChurchWatch uses a product called Stonefield Query to present an easy to use interface for building data filters. Most of the main forms in ChurchWatch have a SET FILTER button. Click this button to display the filter builder shown in Figure 26-2.

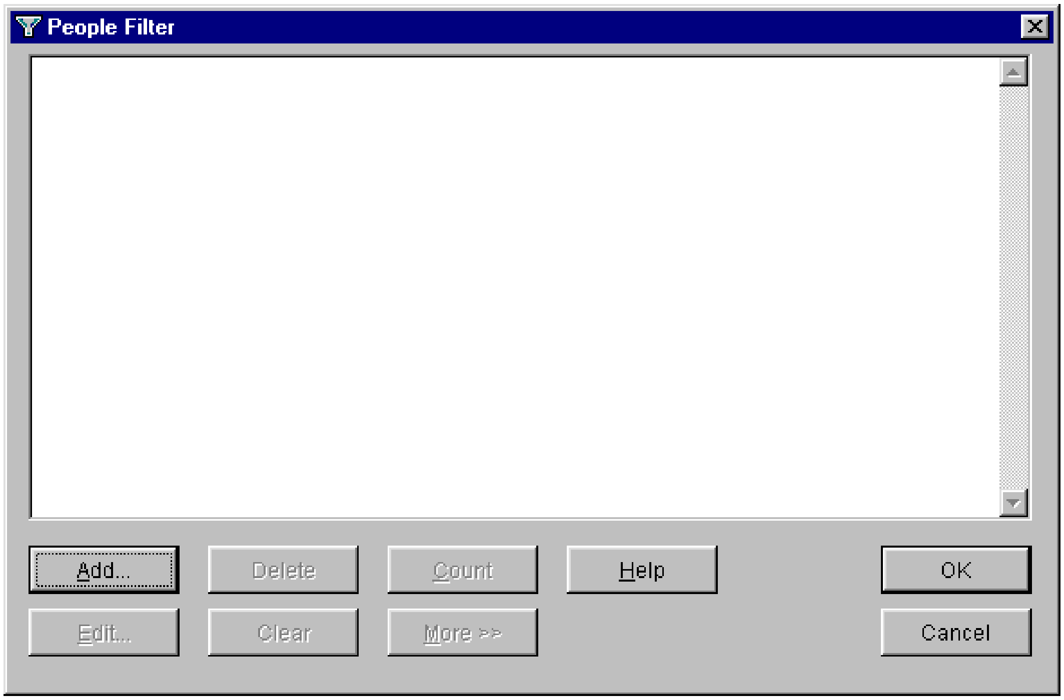


Figure 26-2 The Filter Builder

The filter builder form has a window showing the current filter you have built and are using. In the example in figure 26-2 the window is blank because no filter has yet been built. Table 26-1 explains each of the buttons on this form.

Form Button	Description
Add	Click the ADD button to begin creating a data filter.
Delete	Click the Delete button to delete the current filter.
Count	Click this button to quickly count how many records are included in the new view based on the current data filter you have built.
Help	This button is not used. Refer to the online help.
Edit	Click this button to make changes to the current data filter
Clear	Click this button to delete the current data filter.
More	Click this button for more options such as saving the current data filter for later use. Refer to the paragraph on saving data filters.
OK	Click this button to accept the current data filter and exit.
Cancel	Click this button to cancel any changes you have made to the current data filter and exit the form.

Table 26-1 Data Filter Builder Form Buttons

Creating a Data Filter

To begin building a data filter click the ADD button. The form shown in figure 26-3 will be displayed.

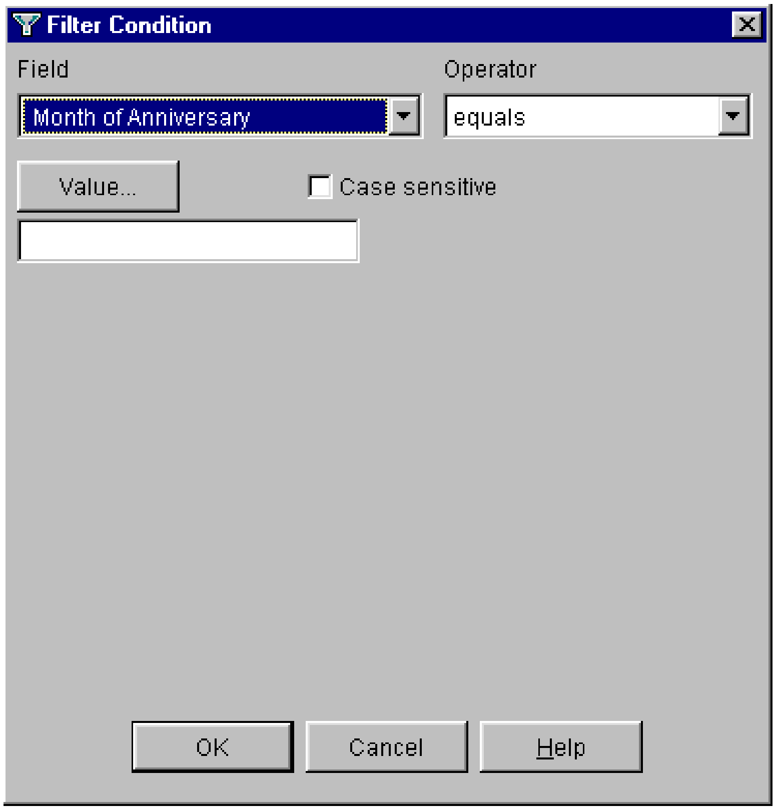


Figure 26-3 Filter Condition Builder

The Filter Condition builder form has two main fields, both found at the top of the form. The "Field" pulldown list contains all fields that you can choose from. You will probably need to refer to Appendix A for table and field information. Items in the list that are greyed-out are titles that indicate the name of the table the fields that follow are from. Knowing the name of the table will a help when you refer to Appendix A. The second main form item is the "Operator" field. This field allows you to choose a comparison operator which is one of:

Operator	Applies To	Description
equals	Any field type	matches, is the same
does not equal	Any field type	does not match, not the same
begins with	Character fields	Character field begins with the text string you provide e.g. Begins with "Sm"
contains	Character fields	Fields chosen from the table must contain the text string you provide and it can be found anywhere.

Operator	Applies To	Description
does not contain	Character fields	Fields chosen from the table must NOT contain the text string you provide and it can be found anywhere.
Is blank	Any field	Field is empty, blank, nothing entered
Is not blank	Any field	Field has something entered in it, non blank
is greater than	Any field except logical	Field is greater than the value you provide. For character fields “B” is greater than “A”.
is greater than or equal to	Any field except logical	Field is greater than or equal to the value you provide. For character fields “B” is greater than “A”.
is less than	Any field except logical	Field is less than the value you provide. For character fields “A” is less than “B”.
is less than or equal to	Any field except logical	Field is less than or equal to the value you provide. For character fields “A” is less than “B”.
is between	Any field except logical	Field is between two values you supply.
is one of	Any field	Field must match one of a set of values you provide.

Table 26-2 Operators

What you see on the rest of the form depends on which operator you choose.

Here’s an example. Suppose you are in the People Manager and you want to build a filter that includes all family names that begin with the letter “W”. To build the filter follow these steps:

STEP 1 Looking in Appendix A you would find that the People table has a field called “family_nam”. In the above example you would find the greyed-out title “People” which would indicate the People Table, and then find the family_nam field and choose it.

STEP 2 Now you need to decide on an operator. Looking at table 26-2 you would choose the “begins with” operator because you want all people with family names that begin with the letter “W”.

STEP 3 When you choose the “begins with” operator the form will change and show a button labeled “VALUE” and a blank field. You can either click the VALUE button or simply enter a value. In this case you would probably enter a “W” in the blank field. At this point the form should look like the one in figure 26-4.

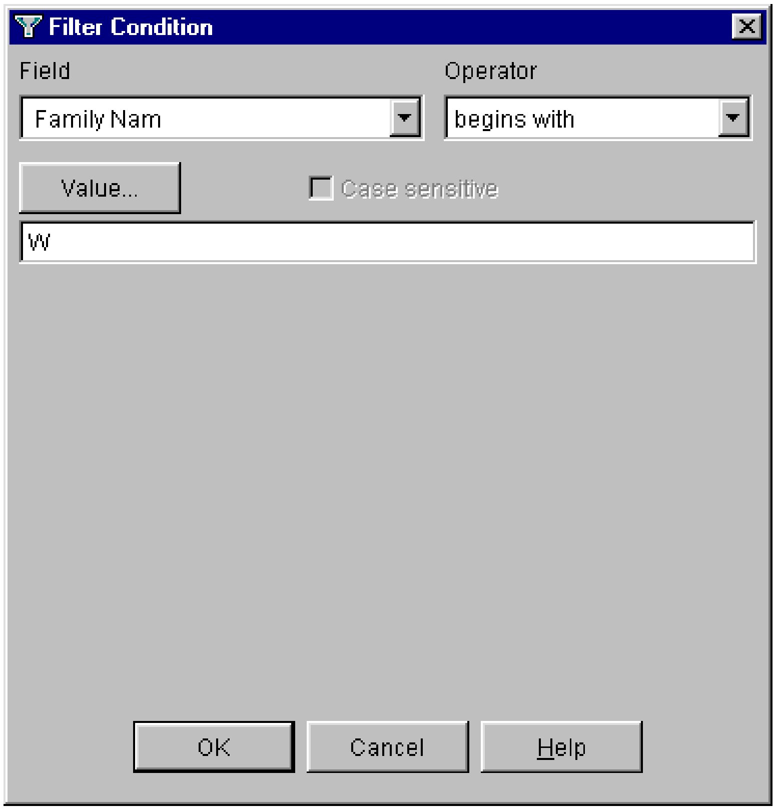


Figure 26-4 Example Filter Condition

STEP 4 Click the OK button to Exit. The filter builder will be showing the current filter you have built. In this example: “family_nam begins with W“

STEP 5 Click OK again. The People Manager will now only show people with a family name that begins with “W”. The word “[Filtered]” will be displayed near the top of the People Manager to remind you that you have a filter in effect. You can clear the filter by clicking the CLEAR FILTER button in the People Manager or by going back into the filter builder (SET FILTER button) and clicking the DELETE button.

Quick Report

Some forms have a Quick Report button. Once you have your filter built you can do a Quick Report to send the data to the printer or to mailing labels. Click the QUICK REPORT button in the form you are using (House, People or Giving).

Compound Filters

Suppose you need to expand the above filter example to include only men whose last name begins with “W”. This type of filter is called a “compound filter” because more than one condition is required to complete it. Assuming the original filter is still in effect, here is how you would add a second condition to create a compound filter.

STEP 1 Click the SET FILTER button again to edit the filter.

STEP 2 Click the ADD button in the filter builder to add the second condition. This time you will notice that the filter condition form has changed. It now includes a "Connection" field.

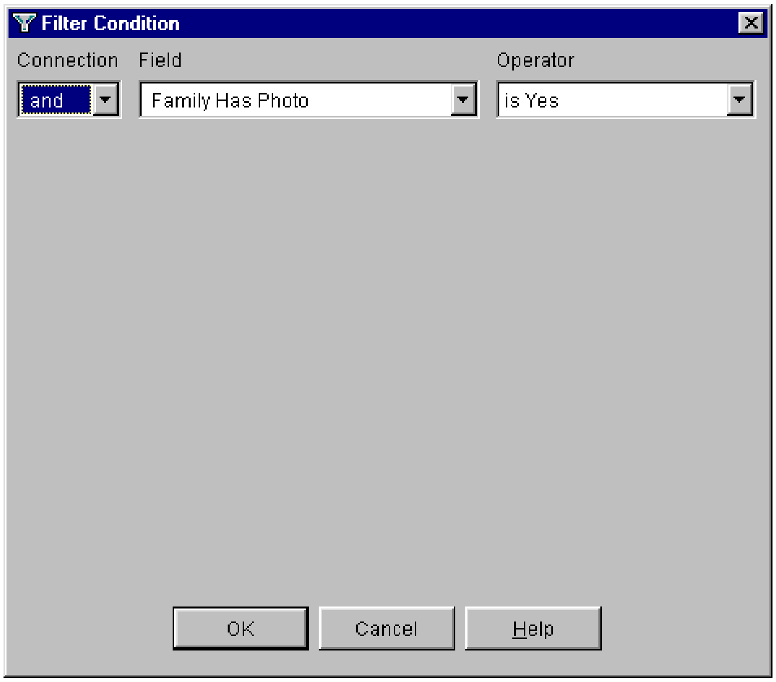


Figure 26-5 Filter Condition Form, Compound Filter

STEP 3 Choose a connection type. This is where things get more difficult. Refer to table 26-3 for help.

Connection	Description
and	Logical "AND". A AND B means that both A and B must be true. In the filter example below, gender must be male **AND** family_name must begin with "W". This is the filter you would use for the example we are working on. e.g. sex = "M" and family_nam begins with"W" This would give a list of all males whose last name begins with the letter W.
or	Logical "OR". A OR B means that if either A or B is true the field is accepted in the filter. For example, if we wanted all males **OR** people with a family name beginning with "W" the filter would be: e.g. sex = "M" or family_nam begins with"W" This would give a list of all males AND any person whose last name begins with W.

Connection	Description
and ( ) and) and (or ( ) or) or (	Filter conditions always work from left to right. If you would like to override the order, you need to use brackets. Brackets are usually only required for compound filters that contain more than two (2) conditions. Items in brackets are always checked first. To illustrate how the use of brackets can change a filter refer to the following three examples: **sex = "M" and family_name begins with "S" or family_nam begins with "W"** The above filter gives all males whose last name begins with S AND any person whose last name begins with "W" because the filter works from left to right. **sex = "M" and (family_name begins with "S" or family_nam begins with "W")** The above filter gives all males whose last name begins with S or W because we have given preference to the items in brackets. **(sex = "M" and family_name begins with "S") or family_nam begins with "W"** The above filter gives all males whose last name begins with S AND any person whose last name begins with "W". You can see that by moving the brackets, or not using brackets at all can produce quite different results.

Table 26-3 Connections

STEP 4 After choosing a connection finish the filter by selecting the appropriate field of interest, another operator and the appropriate value(s).

STEP 5 Click OK. Check the filter displayed for correctness. Click OK again to put the filter into effect.

Saving and Restoring Filters

Once you have a filter working properly you can save it for use at a later date. To save a filter do this:

STEP 1 Click the SET FILTER button to display the filter builder.

STEP 2 Click the MORE>>> button to display the STORE, RETRIEVE and REMOVE buttons. Refer to figure 26-6.

STEP 3 Click the STORE button. In the form displayed, enter a descriptive name and detailed description of the filter. Then click OK. The filter will be saved with the name you entered.

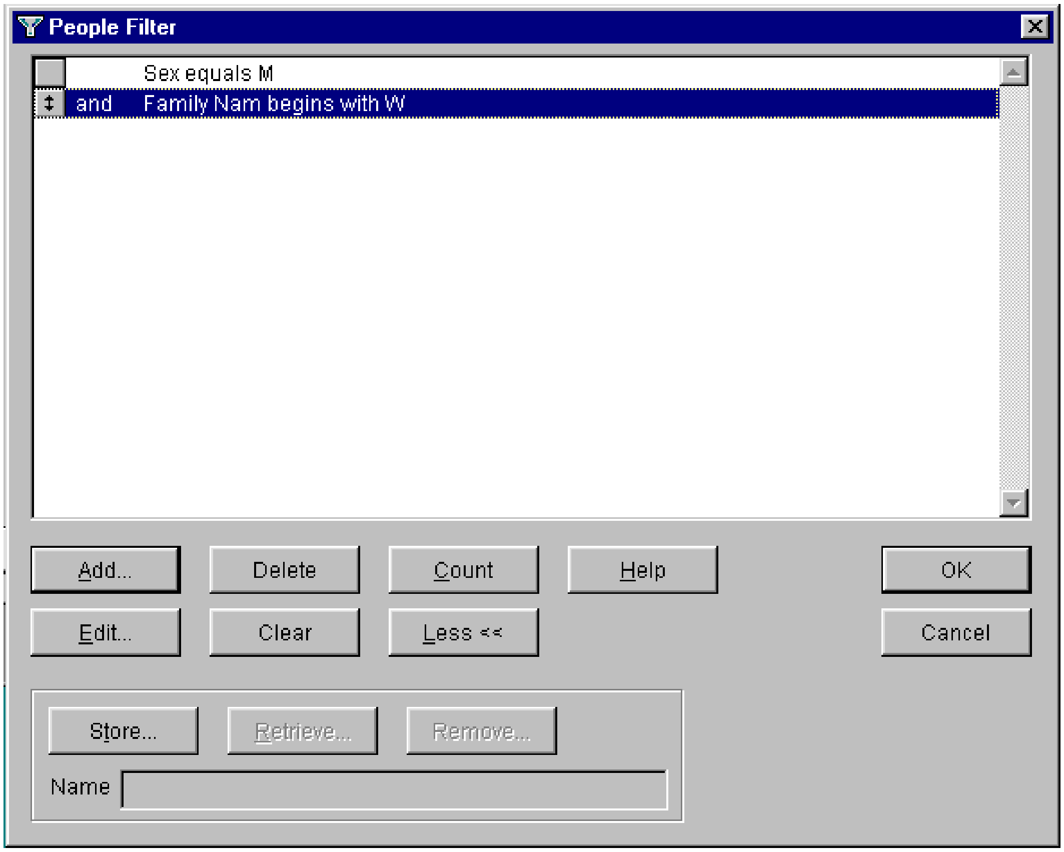


Figure 26-6 Storage and Retrieval of Filters

To Retrieve a filter:

STEP 1 Click the SET FILTER button to display the filter builder.

STEP 2 Click the MORE>>> button to display the STORE, RETRIEVE and REMOVE buttons. Refer to figure 26-6.

STEP 3 Click the RETRIEVE button. In the form displayed, select a filter from the list. Then click OK to exit the form. At this point you can click the REMOVE button to delete the filter or click OK a second time to put the filter into effect.

Note: *All data filters are stored in the same place. All users of ChurchWatch use the same set of saved filters. Keep this in mind if you create a filter you do not want other users to have access to.*

Tip: *To remove a filter first retrieve it and then click the REMOVE button.*

Example Filters

From these filter examples you can see how useful data filters can be.

14. All people with a birthday this month (July):

    From the People Manager:
    Month of birth equals July

2. All people with a birthday between January and April:

    From the People Manager:
    Month of birth is one of January, February, March, April

3. All people who gave an offering last month (January):

    From the People Manager:
    date given is between 1999.01.01 and 1999.01.31

    or from the Giving Manager:
    giving month equals January

4. All people in the Smith small group:

    From the People Manager:
    (under Grp Type) Name equals Smith Small Group

5. All families that live in an area with a zip code prefix 849:

    From the Household Manager:
    postal cod begins with 849

Tip:	*After creating your data filter, use the Quick Report to create a report. Combining a data filter with a Quick Report is a great way to create your own reports.*

Chapter 27 - Support

The Support Contract

In order to receive telephone and e-mail support beyond the 30 day free period, you will need to purchase the optional support contract. The support contract is highly recommended. Please contact White Mountain Software for current pricing. The support contract is valid for a period of twelve months from activation. The support contract costs go toward paying for support time and ongoing improvements to ChurchWatch.

Web Page and Periodic Software Updates

The home page of ChurchWatch is **http://www.churchwatch.com**. The home page of White Mountain Software is **http://www.whitemountainsoftware.com**. Watch the churchwatch.com page for periodic software updates and for other support information and news. You can use the automatic online update feature of ChurchWatch to check for new software at any time.

Contact Information

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610 Bronson Cres.
Saskatoon, SK.
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306.955.3657

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support@churchwatch.com
sales@churchwatch.com

Support Hours

White Mountain Software is a home based business. Sales Office hours are 9:00AM to 11:30AM and 1:00PM to 5:00PM Central Standard Time Monday through Friday. Technical support is available between the hours of 6:00PM and 9:00PM Central Standard Time Monday through Friday and 9:00AM to 9:00PM on Saturdays. E-mail is recommended and e-mails will be answered by the next business morning. **Whenever possible please use e-mail to forward your questions and comments.**

New Reports

If the report you need is missing from ChurchWatch, White Mountain Software may be able to add the report you require for a small hourly fee. Contact us for current pricing.

Appendix A - Table Structures

This appendix lists each database table used in ChurchWatch and the corresponding field names and types. The type is one of:

Numeric	Numbers only
Character	Character text or numbers (text string)
Logical	True (.T.) Or False (.F.)
Date	Date
DateTime	Date and Time
Currency	Monetary. Numbers only with 2 decimal places
Memo	Character text or numbers (text string) of any length

Width is the number of characters allowed in the field and Dec is the number of places right of a decimal place. If Dec is blank, no decimals are allowed in the field.

Tip: *To explore a table and see example entries use the Query Manager and do a "Select * From <table name>". For example, SELECT * FROM HOUSE*

Structure for table: **ACCOUNT.DBF** (Giving Account names)

Field	Field Name	Type	Width	Dec	Description
1	ACCOUNT	Character	40		Account name
2	RECEIPTABL	Logical	1		True if receiptable account
3	DATE_CREAT	Date	8		Date created
4	COMMENT	Character	55		Comments
5	NUMBER	Numeric	7		Account Number
6	GOAL	Currency	8	2	Target or goal

Structure for table: **ACTIVE_E.DBF** (Active Events and classes)

Field	Field Name	Type	Width	Dec	Description
1	ACTIVE_EID	Numeric	8		Active Event ID
2	EVENT_ID	Numeric	5		Event ID
3	CLASS_ID	Numeric	4		Class ID
4	FROM_DATE	DateTime	8		From date/time
5	TO_DATE	DateTime	8		To date/time

Structure for table: **ATND_SUM.DBF** (Attendance summary records)

Field	Field Name	Type	Width	Dec	Description
1	ACTIVE_EID	Numeric	8		Active Event ID
2	ATTENDANCE	Numeric	7		Attendance summary total
3	MEMBTYPE	Character	20		For this membership type

Structure for table: **ATTEND.DBF** (Detailed attendance)

Field	Field Name	Type	Width	Dec	Description
1	ACTIVE_EID	Numeric	8		Active event ID
2	PER_ID	Numeric	5		Person ID
3	PRESENT	Logical	1		True if person present
4	EXCUSED	Logical	1		True if person excused
5	SICK	Logical	1		True if person sick

```
Structure for table:   BATCH.DBF           (Giving batch information)
Field  Field Name      Type                Width    Dec   Description
    1  BATCH_ID        Character              6           Batch ID
    2  DATE_GIVEN      Date                   8           Batch date
    3  DESIGNATOR      Character             50           Batch name
    4  PRE_TOTAL       Currency               8       2   Batch pre-calculated total

Structure for table:   BIBLES.DBF          (Bible translations)
*** PROPRIETARY ***

Structure for table:   CALL_LOG.DBF        (Dialer call log)
Field  Field Name      Type                Width    Dec   Description
    1  UID             Character             50           Internal user ID
    2  CALL_DATE       DateTime               8           Date of the call
    3  CALLED          Character             40           Who was called
    4  NUMBER          Character             30           Phone number called

Structure for table:   C_NOTES.DBF
*** PROPRIETARY ***

Structure for table:   DATES.DBF           (User defined date values)
Field  Field Name      Type                Width    Dec   Description
    1  PER_ID          Numeric                6           Person ID
    2  DATE_ID         Numeric                5           Date ID
    3  DATE            Date                   8           Date value

Structure for table:   DATENAME.DBF        (User defined date names)
Field  Field Name      Type                Width    Dec   Description
    1  DATE_ID         Numeric                5           Date ID
    2  NAME            Character             50           Name for the date type

Structure for table:   EV_TASKS.DBF        (Event tasks assigned to people)
Field  Field Name      Type                Width    Dec   Description
    1  EVENT_ID        Numeric                8           Event ID
    2  PER_ID          Numeric                6           Person ID
    3  COMPLETE        Logical                1           True if tasks completed
    4  TASK            Memo                   4           Tasks assigned to person
```

Structure for table: **EVENTS.DBF** (Event descriptions)

Field	Field Name	Type	Width	Dec	Description
1	EVENT_ID	Numeric	5		Event ID
2	EVENT_NAME	Character	50		Event name
3	OCCURS	Numeric	2		Occurs type:
					1 = occurs once
					2 = Every <day of week>
					3 = Every x days
					4 = Once a month on day x
					5 = Every xth <day>
					6 = xth <day> of the month
4	FROM_DATE	DateTime	8		Event's start date/time
5	TO_DATE	DateTime	8		Event's end date/time
6	REMINDER	Logical	1		True if reminder required
7	REMINDTIME	Numeric	5		Remind minutes before event
8	REOCCUR_P1	Numeric	2		Recurring parameter for type
					Type1 N/A
					Type2 day of week
					(Sunday = 1)
					Type3 number of days
					Type4 day # of month
9	OCCURUNTIL	Date	8		Date event recurs until
10	DESCRIPT	Memo	4		Description of event
11	PUBLISH	Logical	1		.T. to publish in calendars
12	REOCCUR_P2	Numeric	2		Recurring parameter
					Type5 day of week
					Type6 day of week
13	EXCLUDE	Logical	1		.T. to exclude from conflict checking

Structure for table: **FAC_TYPE.DBF** (Facility type names)

Field	Field Name	Type	Width	Dec	Description
1	FAC_ID	Numeric	5		Facility ID
2	NAME	Character	50		Facility name
3	DATE_CREAT	Date	8		Date created
4	COMMENT	Character	50		Comments

Structure for table: **FACILITY.DBF** (Facilities assigned to events)

Field	Field Name	Type	Width	Dec	Description
1	EVENT_ID	Numeric	5		Event ID
2	FAC_ID	Numeric	5		Facility ID

Structure for table: **FONEBOOK.DBF** (Phone dialer phone books)

Field	Field Name	Type	Width	Dec	Description
1	NAME	Character	75		Person or business name
2	TYPE	Character	15		Type of entry
3	PHONE_NUM	Character	30		Phone number
4	UID	Character	50		User ID

Structure for table: **GIVING.DBF** (Giving and pledge records)

Field	Field Name	Type	Width	Dec	Description
1	ENVELOPE_N	Numeric	5		Emvelope number
2	FAMILY_ID	Numeric	5		Family ID
3	PER_ID	Numeric	6		Person ID
4	FIRST_NAME	Character	15		First name
5	MIDDLE_NAM	Character	20		Middle name
6	FAMILY_NAM	Character	40		Family name
7	ACCOUNT	Character	40		Giving account name
8	AMOUNT	Currency	8	2	Amount of offering/pledge
9	DATE_GIVEN	Date	8		Date offering was given
10	RECEIPTABL	Logical	1		True if receiptable
11	RECEIPT_PR	Logical	1		True if receipt printed
12	COMMENT	Character	40		Comments
13	RECEIPTN	Numeric	6		Tax Receipt number
14	GTYPE	Numeric	1		Giving Type: 1=Check 2=Cash 3=Credit Card 4=Gift-In-Kind
15	CHECK_NO	Numeric	10		Check # if check
16	EXPORTDATE	Date	8		Date record was exported using the Export Manager
17	BATCH_ID	Character	6		Batch ID

Structure for table: **GRP_TYPE.DBF** (Church group names)

Field	Field Name	Type	Width	Dec	Description
1	GRP_ID	Numeric	5		Group ID
2	NAME	Character	50		Group name
3	DATE_CREAT	Date	8		Date created
4	COMMENT	Character	50		Comments

Structure for table: **GROUPS.DBF** (People assigned to a group)

Field	Field Name	Type	Width	Dec	Description
1	GRP_ID	Numeric	5		Group ID
2	PER_ID	Numeric	5		Person ID

Structure for table: **HOUSE.DBF** (House table, address information)

Field	Field Name	Type	Width	Dec	Description
1	FAMILY_ID	Numeric	5		Family ID
2	FAMILY_NAM	Character	40		Family name
3	ADDRESS1	Character	40		Address field #1
4	ADDRESS2	Character	40		Address field #2
5	CITY	Character	30		City
6	PROV	Character	2		State or province
7	POSTAL_COD	Character	12		Zip or postal code
8	HOUSPHONE1	Character	30		Main household phone #1
9	DIRECTORY	Logical	1		True if family in directory
10	PCAPTION	Character	60		Photo caption
11	COUNTRY	Character	40		Country name
12	ALT_ADDR1	Character	40		Alternate address field #1
13	ALT_CITY	Character	30		Alternate city
14	ALT_PROV	Character	2		Alternate state or province
15	ALT_CNTRY	Character	40		Alternate country name
16	ALT_POSTAL	Character	12		Alternate zip or postal code
17	ALT_PHONE	Character	30		Alternate phone #1
18	ALT_ADDR2	Character	40		Alternate address field #2
19	HOUSPHONE2	Character	30		Main household phone #2
20	ALT_PHONE2	Character	30		Alternate phone #2
21	H_USR_C1	Character	30		User character field #1
22	H_USR_C2	Character	30		User character field #2
23	H_USR_CHK1	Logical	1		User checkbox #1
24	H_USR_CHK2	Logical	1		User checkbox #2
25	H_USR_N1	Numeric	7		User numeric field #1
26	H_USR_N2	Numeric	7	2	User numeric field #2
27	PUBLISH	Numeric	1		Publishing levels: 1 = No restrictions 2 = Name and Address 3 = Name and Phone 4 = Publish Name Only
28	TYPE	Numeric	1		Type of record: 1 = Church Family 2 = Temporary Giver 3 = Contact 4 = Vendor
29	EMAIL	Character	40		Email
30	ALT_EMAIL	Character	40		Alternate Email
31	ID_LEVEL	Character	40		Proprietary field
32	MAILBOX	Character	6		Church mail box
33	QUICKSRCH	Character	55		Driver for QuickSearch list

Structure for table: **HYMNS.DBF** (Hymn lyrics)

*** PROPRIETARY ***

Structure for table: **LIBRARY.DBF** (Library Manager items)

Field	Field Name	Type	Width	Dec	Description
1	ITEM_ID	Numeric	7		Item ID
2	DATE_CREAT	Date	8		Date created
3	TITLE	Character	50		Title
4	AUTHOR	Character	40		Author
5	IDENTIFIER	Character	20		Identifier (eg ISBN)
6	LOCATION	Character	20		Location of item
7	PUB_DATE	Date	8		Publication date
8	TYPE	Character	10		Type of item
					1 = Book
					2 = Cassette
					3 = CD
					4 = DVD
					5 = Magazine
					6 = Newspaper
					7 = Video
					8 = Other
9	KEYWORDS	Character	50		Keywords for search
10	DESCRIPT	Memo	4		Description
11	ON_LOAN	Logical	1		TRUE if on loan
12	ON_LOAN_TO	Numeric	6		On loan to who?
13	DUE_BACK	Date	8		Date due back

Structure for table: **MAIL_M.DBF** (Form letters and bulk e-mails)

Field	Field Name	Type	Width	Dec	Description
1	LAST_MOD	DateTime	8		Last time form let. modified
2	NAME	Character	40		Name of form letter
3	LETTER	Memo	4		Form letter body
4	HEAD_FILE	Character	40		Path to header .BMP file
5	SIG_FILE	Character	40		Path to footer .BMP file
6	PRINT_NAME	Character	40		Name to print for signature
7	ENABLE_HD	Logical	1		True if header enabled
8	ENABLE_SIG	Logical	1		True if footer enabled
9	SUBJECT	Character	100		Subject (for e-mail)

Structure for table: **MEMBTYPE.DBF** (Membership type names)

Field	Field Name	Type	Width	Dec	Description
1	MEMB_ID	Numeric	5		Membership Type ID
2	NAME	Character	20		Membership name
3	DATE_CREAT	Date	8		Date created
4	COMMENT	Character	50		Comments

Structure for table: **MINUTES.DBF** (Meeting minutes - Attendance Manager)

Field	Field Name	Type	Width	Dec	Description
1	ACTIVE_EID	Numeric	8		Active Event ID
2	MINUTES	Memo	4		Meeting minutes

Structure for table: **MSGS.DBF**

*** PROPRIETARY ***

Structure for table: **MSTATUS.DBF** (Marital status types)

Field	Field Name	Type	Width	Dec	Description
1	STATUS	Character	10		Marital Status

Structure for table: **ND_TYPE.DBF** (Special need names)

Field	Field Name	Type	Width	Dec	Description
1	NEED_ID	Numeric	5		Special need ID
2	NAME	Character	50		Special need name
3	DATE_CREAT	Date	8		Date created
4	COMMENT	Character	50		Comments

Structure for table: **NEEDS.DBF** (Special needs assigned to people)

Field	Field Name	Type	Width	Dec	Description
1	NEED_ID	Numeric	5		Special need ID
2	PER_ID	Numeric	5		Person ID

Structure for table: **PARISH.DBF** (Church Names)

Field	Field Name	Type	Width	Dec	Description
1	C_NAME	Character	50		Church Name
2	FOLDER	Character	50		Folder containing data
3	ADDRESS1	Character	40		Church address
4	ADDRESS2	Character	40		Chruch address
5	CITY	Character	40		Church city
6	PROV	Character	2		Province or State
7	COUNTRY	Character	50		Church country
8	ZIP	Character	12		ZIP or postal code
9	PHONE	Character	30		Church phone
10	FAX	Character	30		Church fax
11	EMAIL	Character	50		Church email
12	WEB_PAGE	Character	50		Church web page
13	CHARITY	Character	20		Charitable Registration #
14	LOGO_FILE	Character	50		Church logo filename
15	DEF_CAT	Character	40		Default catagory
16	SIG_FILE	Character	50		Signature filename
17	SIG_TEXT	Character	50		Text for digital signature
18	DEF_ZIP	Character	12		Default postal code
19	BACKUPPATH	Character	100		Default backup path
20	LAST_BACK	DateTime	8		Last backup date
21	F_YEAR_END	Date	8		Fiscal year end date

Structure for table: **PEOP_REQ.DBF** (People required at an event)

Field	Field Name	Type	Width	Dec	Description
1	EVENT_ID	Numeric	5		Event ID
2	PER_ID	Numeric	5		Person ID

Structure for table: **PEOPLE.DBF** (People details)

Field	Field Name	Type	Width	Dec	Description
1	FAMILY_ID	Numeric	5		Family ID
2	PER_ID	Numeric	6		Person ID
3	FAMILY_NAM	Character	40		Family name
4	FIRST_NAME	Character	15		First name
5	MIDDLE_NAM	Character	20		Middle name
6	SEX	Character	1		Gender (“M” or “F”)
7	BIRTHDATE	Date	8		Birthdate
8	OCCUPATION	Character	40		Occupation
9	MEMBERDATE	Date	8		Membership date
10	RECORD_LEV	Numeric	5		Authority: 1 = Main Contact 2 = Spouse 3 = Child 4 = Other
11	ENVELOPE_N	Numeric	5		Envelope number
12	WORKPHONE	Character	30		Work phone
13	EMPLOYER	Character	30		Employer name
14	FAX	Character	30		Fax number
15	EMAIL	Character	40		E-Mail address (home)
16	NOTES	Memo	4		Person’s notes
17	EXTENSION	Character	5		Work phone extension
18	CELLULAR	Character	30		Cellular phone number
19	PHONE1	Character	30		User phone #1
20	PHONE2	Character	30		User phone #2
21	EMAIL_WORK	Character	40		Email address (work)
22	ANNIV	Date	8		Anniversary date
23	DEATH	Date	8		Date of death
24	MEMBER	Character	20		Membership level
25	LAST_VISIT	Date	8		Last date visited
26	YN_MEMB	Logical	1		True if member
27	YN_DEATH	Logical	1		True if deceased
28	MAIDENNAME	Character	40		Maiden name
29	VISIT_BY	Character	50		Last visited by (name)
30	STATUS	Character	10		Marital status
31	USER_C1	Character	30		User character field #1
32	USER_C2	Character	30		User character field #2
33	USER_C3	Character	30		User character field #3
34	USER_CHK1	Logical	1		User checkbox #1 (True/False)
35	USER_CHK2	Logical	1		User checkbox #2 (True/False)
36	USER_CHK3	Logical	1		User checkbox #3 (True/False)
37	USER_N1	Numeric	7		User numeric field #1
38	USER_N2	Numeric	7		User numeric field #2
39	USER_N3	Numeric	7	2	User numeric field #3
40	USER_C4	Character	30		User character field #4
41	USER_C5	Character	30		User character field #5
42	USER_C6	Character	30		User character field #6
43	TITLE	Character	15		Person’s title (Mr., Mrs...)
44	PREFERRED	Character	15		Preferred name
45	PROSPECT	Logical	1		True if person is prospect
46	PDIRECTORY	Logical	1		True if person in directory
47	FATHER	Numeric	6		Person ID of father
48	MOTHER	Numeric	6		Person ID of mother
49	ID_LEVEL	Numeric	6		Proprietary field
50	WEB_PAGE	Numeric	6		Personal web page URL
51	QUICKSRCH	Numeric	6		Driver for QuickSearch list

Structure for table: **PLEDGES.DBF** (Pledges)

Field	Field Name	Type	Width	Dec	Description
1	PLEDGEDATE	Date	8		Pledge start date
2	FAMILY_ID	Numeric	5		Family ID
3	PER_ID	Numeric	6		Person ID
4	AMOUNT	Currency	8	2	Amount
5	ACCOUNT	Character	40		Account
6	FREQUENCY	Numeric	1		Frequency
7	END_DATE	Date	8		Pledge end date
8	COMMENT	Character	50		Comment

Structure for table: **QUERIES.DBF** (Saved queries from Query Manager)

Field	Field Name	Type	Width	Dec	Description
1	NAME	Character	50		Query name
2	DESCRIPT	Memo	4		Description of query
3	QUERY	Memo	4		Query (SQL command)

Structure for table: **RECEIPT.DBF** (Last receipt number)

Field	Field Name	Type	Width	Dec	Description
1	LAST_RECPT	Numeric	10		Last receipt number

Structure for table: **REP_FAVS.DBF**
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Structure for table: **REP_USER.DBF**
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Structure for table: **REPORTS.DBF**
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Structure for table: **RES_TYPE.DBF** (Resource names)

Field	Field Name	Type	Width	Dec	Description
1	RES_ID	Numeric	5		Resource ID
2	NAME	Character	50		Resource name
3	DATE_CREAT	Date	8		Date created
4	COMMENT	Character	50		Comments
5	ASSET_NO	Character	12		Asset number
6	MAKER	Character	30		Manufacturer
7	MODEL	Character	15		Model number
8	SERIAL_NO	Character	15		Serial number
9	PUR_BY	Character	20		Purchased by (name)
10	PUR_DATE	Date	8		Purchase date
11	PUR_PRICE	Currency	8	2	Purchase price
12	VENDOR	Memo	4		Vendor name and address
13	WARRANTY	Date	8		Date warranty expires
14	SALE_DATE	Date	8		Sale date
15	SALE_PRICE	Currency	8	2	Sale price (if sold)
16	SOLD_TO	Memo	4		Who sold to name and address
17	BORROWEDBY	Numeric	6		Person ID who borrowed
18	BORROWDATE	Date	8		Date resource borrowed

Structure for table: **RESOURCE.DBF** (Resources assigned to events)

Field	Field Name	Type	Width	Dec	Description
1	EVENT_ID	Numeric	5		Event ID
2	RES_ID	Numeric	5		Resource ID

Structure for table: **SERMON.DBF** (Sermons)

Field	Field Name	Type	Width	Dec	Description
1	SERMON_ID	Numeric	6		Sermon ID
2	DATE_CREAT	Date	8		Date created
3	TITLE	Character	50		Sermon title
4	FILENAME	Character	100		Sermon filename
5	KEYWORDS	Character	50		Sermon keywords
6	NOTES	Memo	4		Sermon notes
7	WRITTEN_BY	Character	30		Person who wrote the sermon

Structure for table: **SERMON_DATES.DBF** (Sermon dates)

Field	Field Name	Type	Width	Dec	Description
1	SERMON_ID	Numeric	6		Sermon ID
2	DATE_GIVEN	Date	8		Date given
3	COMMENT	Memo	4		Comments and notes
4	GIVEN_BY	Character	30		Who gave the sermon

Structure for table: **SETUP.DBF**
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Structure for table: **SKILLS.DBF** (Time and talents assigned to people)

Field	Field Name	Type	Width	Dec	Description
1	PER_ID	Numeric	6		Person ID
2	FAMILY_ID	Numeric	5		Family ID
3	TYPE	Character	1		Time/Talent type (see below)
4	SKILL	Character	40		Time/Talent name

Structure for table: **SKILTYPE.DBF** (Time and talent names)

Field	Field Name	Type	Width	Dec	Description
1	TYPE	Character	1		Time/Talent type
2	SKILL	Character	40		Time/Talent name
3	DATE_CREAT	Date	8		Date created

Structure for table: **SL.DBF**
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Structure for table: **SPD_DIAL.DBF**

Field	Field Name	Type	Width	Dec	Description
1	NAME	Character	15		Name
2	PHONE_NUM	Character	30		Phone number
3	UID	Character	50		Internal user ID

Structure for table: **SS_ACHEV.DBF** (Achieved classes assigned to people)

Field	Field Name	Type	Width	Dec	Description
1	PER_ID	Numeric	6		Person ID
2	CLASS_NAME	Character	40		Class name
3	ACHEV_DATE	Date	8		Date class achieved

Structure for table: **SS_AWARD.DBF** (Awards assigned to people)

Field	Field Name	Type	Width	Dec	Description
1	PER_ID	Numeric	6		Person ID
2	AWARD_ID	Numeric	4		Award ID
3	AWARD_DATE	Date	8		Date awarded

Structure for table: **SS_AWTYP.DBF** (Class award names)

Field	Field Name	Type	Width	Dec	Description
1	AWARD_ID	Numeric	4		Award ID
2	AWARD_NAME	Character	40		Award name
3	DATE_CREAT	Date	8		Date created
4	COMMENT	Character	50		Comments

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Structure for table:    SS_CLASS.DBF          (Class descriptions)
Field  Field Name       Type                 Width    Dec   Description
    1  CLASS_ID         Numeric                  4          Class ID
    2  CLASS_NAME       Character               50          Class name
    3  START_TIME       DateTime                 8          Class start time and date
    4  END_TIME         DateTime                 8          Class end time and date
    5  OCCURS           Numeric                  1          Occurs type:
                                                              1 = occurs once
                                                              2 = Every <day of week>
                                                              3 = Every x days
                                                              4 = Once a month on day x
    6  REOCCUR_P1       Numeric                  2          Recurring parameter for type
                                                              Type1  N/A
                                                              Type2  day of week
                                                                     (Sunday = 1)
                                                              Type3  number of days
                                                              Type4  day # of month
                                                              5 = Every xth <day>
                                                              6 = xth <day> of the month
    7  OCCURUNTIL       Date                     8          Date recurring stops
    8  DESCRIPT         Memo                     4          Description of class
    9  PUBLISH          Logical                  1          .T. to publish in calendars
   10  REOCCUR_P2       Numeric                  2          Recurring parameter
                                                              Type5  day of week
                                                              Type6  day of week
   11  EXCLUDE          Logical                  1          .T. to exclude from conflict
                                                            checking

Structure for table:    SS_ENROL.DBF          (People enrolled in classes)
Field  Field Name       Type                 Width    Dec   Description
    1  CLASS_ID         Numeric                  4          Class ID
    2  PER_ID           Numeric                  6          Person ID (enrolled)

Structure for table:    SS_FAC.DBF            (Facilities assigned to classes)
Field  Field Name       Type                 Width    Dec   Description
    1  CLASS_ID         Numeric                  4          Class ID
    2  FAC_ID           Numeric                  5          Facility ID

Structure for table:    SS_NOTES.DBF
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Structure for table:    SS_RES.DBF            (Resources assigned to classes)
Field  Field Name       Type                 Width    Dec   Description
    1  CLASS_ID         Numeric                  4          Class ID
    2  RES_ID           Numeric                  5          Resource ID

Structure for table:    SSTAUGHT.DBF          (Classes people have taught)
Field  Field Name       Type                 Width    Dec   Description
    1  PER_ID           Numeric                  6          Person ID
    2  CLASS_NAME       Character               40          Class name
    3  TEACH_DATE       Date                     8          Date person assigned teacher

Structure for table:    TEACHERS.DBF          (All current teachers)
Field  Field Name       Type                 Width    Dec   Description
    1  CLASS_ID         Numeric                  4          Class ID
    2  PER_ID           Numeric                  6          Person ID

Structure for table:    THEMES.DBF
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Structure for table: **TITLES.DBF** (Title types)

Field	Field Name	Type	Width	Dec	Description
1	TITLE	Character	15		Title (Mr., Mrs. etc)

Structure for table: **TO_DO.DBF** (To-Do List)

Field	Field Name	Type	Width	Dec	Description
1	UID	Character	50		User ID
2	DESCRIPT	Character	50		Description of to-do item
3	NOTES	Memo	4		Notes
4	DUE_DATE	Date	8		Due Date
5	DONE_DATE	Date	8		Date to-do item completed
6	DONE	Logical	1		True if to-do item completed

Structure for table: **USERS.DBF**
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Structure for table: **WIN_DATA.DBF**
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