ezra

U S E R
M A N U A L

EZRA - the complete parish management software empowers the parish staff to keep families informed, active, and connected to the church. Easy to use features provide innovative ways to save time, maintain church records, and track funds and finances.

CONTENTS

Introduction

Setting Up

Getting Started

Modules

KEY FEATURES

EZRA comprises eight modules, each designed to ensure that every aspect of the parish is managed efficiently:

1. **Family Register** – an electronic register of all the families, their members, contact details, sacramental details etc

2. **Sacramental registers**- a searchable electronic database of all the sacramental records. Locating entries are quicker and helps preserve valuable records.

3. **Ministry and event scheduler**- Schedule anything from simple one-time events to complex multi-year events using multiple facilities

4. **Parish groups**- electronic register of various church groups such as UCM, youth group, Knights of St Columbia

5. **HR Management**- Manage the details of Clergy, office staff, volunteers and parish council.

6. **Facilities Management**- manage church facilities such as parish hall, car park etc

7. **Education Services**- Manage data from Schools, Governing bodies, teachers and school chaplaincy

8. **finance** – Manage regular donations made to the church, Sunday collection and special collections etc

In order to make the most of EZRA in the management of the church, some preparation will be needed to collect and enter information and details of church members, sacramental registers and service details Families may need to be issued a form in which they fill in their relevant details explaining to each family the importance of gathering such information and how beneficial it would be in the long term. Families should also be reassured that the information gathered for EZRA will be dealt with confidentiality and that it will only be available to the parish priest and secretary. If there is data already electronically stored in another database or in an Excel spreadsheet, Hume Technologies will be able to transfer these files into EZRA. Please contact Hume Technologies to discuss this. Some of the information required for the EZRA system includes:

1. Name and Surname
2. Address including post code
3. Telephone number(s)
4. Names of all family members
5. Date of Birth of all family members
6. Profession- Company Executive, Student etc
7. Approx. date of joining church
8. Giftaid envelope number
9. Membership in any parish groups
10. Volunteer service to the parish activities

Gathering all this information together rather than having to refer to different records within the church would ease the entry of the data in the setting up period.

USING THE USER MANUAL

This User Manual has been designed to help you understand and use EZRA systematically. The screen shots that have been illustrated represent the product in this specific version of EZRA. The names and details of members and groups used in the examples are fictitious.

COMMONLY USED BUTTONS

Button	Icon	Description
SAVE	SAVE	Save the record or data entries.
CLOSE	CLOSE	To Close the Form
SEARCH	SEARCH	To search from the previous
NEW	NEW	To reset the form and helps to enter a new Record/Entry
DELETE	DELETE	To delete an entry, which we have already done
MEMBERS	MEMBERS	To Add/View members in a family

SUPPORT

Hume Technologies honor all customer queries and committed to provide support services as quick as possible; even after the office hours.
Support can be attained via the following:

Web: www.parishmanagementsoftware.com
Email: support@humetechnologies.com
Phone: +44 (0) 20 8622 3422
Fax: + 44(0) 20 8622 3255

By Post:
Hume Technologies Ltd
1 Furzeground Way
Heathrow Stockley Park
Uxbridge
England
UB11 1BD

INSTALLING EZRA

To install the EZRA software onto the computer, insert the bootable CD. There will be an instant prompt to install the system. Follow the instructions given on screen to complete the installation. If there are any problems please contact Hume Technologies support team for further instructions.
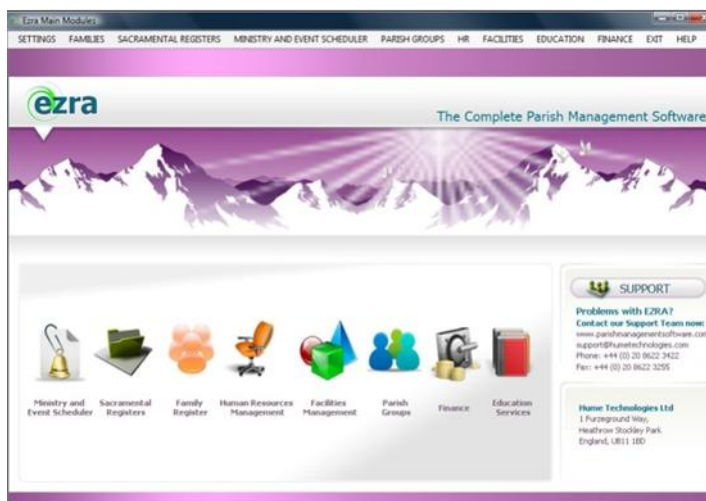
SYSTEM REQUIREMENTS

- ✓ Operating system-Windows XP or higher
- ✓ CPU (processer) - 500 MHz or greater
- ✓ RAM (memory) - 512 MB or greater
- ✓ Internet Connection-not required
- ✓ Available Disc space- 2.0 GB
- ✓ Screen Resolution- 1024 x 768

Logging In
(Fig 1- Login Screen)

> ➢ Enter User name
> ➢ Enter password
> ➢ Click LOGIN

Home Screen
(Fig 2- Home Screen)

The tool bar displays the eight modules:

> ➢ Families
> ➢ sacramental registers
> ➢ ministry and event scheduler
> ➢ Parish groups
> ➢ HR
> ➢ Facilities
> ➢ Education
> ➢ Finance

The toolbar also includes the options, SETTINGS, HELP, and EXIT buttons.

GETTING STARTED

The process of entering data into the EZRA system may take a bit of time to complete, however we believe that this will be a worthwhile procedure that will benefit the management of the church in the long term.

Ezra is a very easy to use system however Hume Technologies support may be able to offer training sessions. Please contact Hume technologies support team for more details concerning training sessions. For more help on getting started with Ezra, see Help topic.

SETTINGS FAMILIES SACRAMENTAL REGISTERS MINISTRY AND EVENT SCHEDULER PARISH GROUPS HR FACILITIES EDUCATION FINANCE EXIT HELP
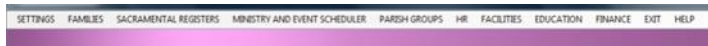
The purple panel under the toolbar will be empty, but will display the name of the church that Ezra has been registered to once you have entered in the church details onto the system.

Church Details

Fill out the details of the church by clicking SETTINGS>Church details

Enter church details in the respective fields: Click SAVE

Clicking SAVE will prompt you to confirm your save; Click YES.
You will be able to update these details if any of them happen to change by clicking the UPDATE button which will appear at the bottom of the screen.

At the home screen click SETTINGS>Settings
Enter the username and password and the database name.
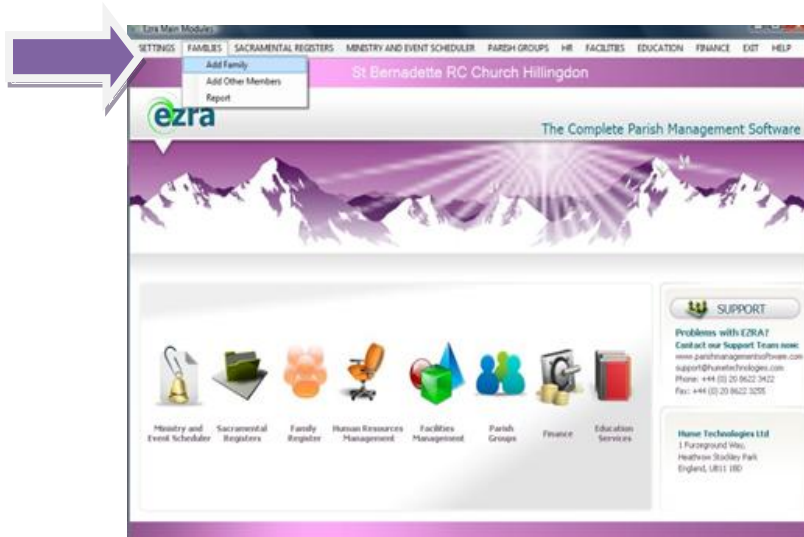Browse folders in which you can store and locate this data. Click ACCEPT.

Database Connection
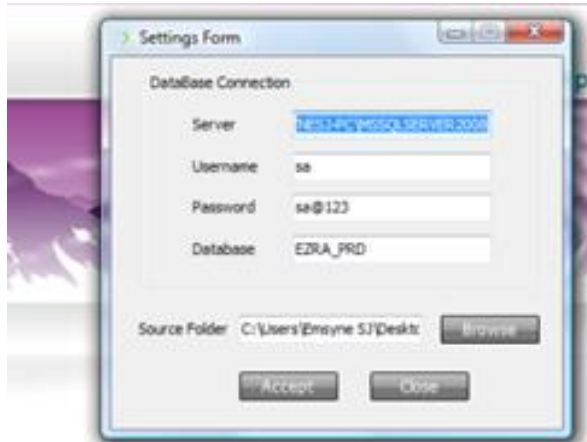
At the home screen click SETTINGS>Settings.
Enter the username and password and the database name.
Browse folders in which you can store and locate this data; Click ACCEPT.

User Management
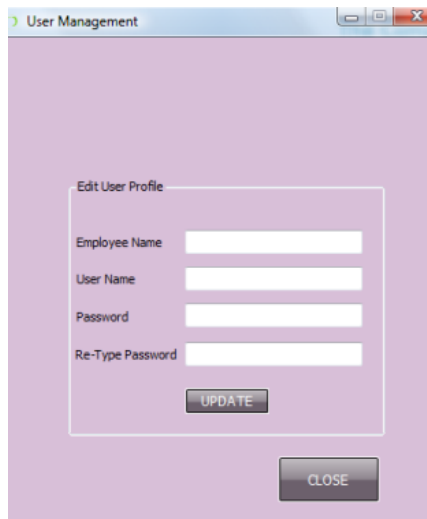
At home screen click SETTINGS> User management
Enter new user name and password
Click on UPDATE and CLOSE.

MODULE 1: FAMILIES

This module allows you to record the details of families that attend the church; specific members can be searched and easily contacted.

Adding a Family

At homepage click FAMILIES>Add Family; you will be directed to the following screen.

Family input screen

Family ID

Each family is given their own ID so that they can easily be searched in the database. It Is up to you how you choose to do this. A suggestion is use the initials of the church, the family name and number.

In this case the family ID is SB/01/SJ.

(Note: ensure the family Id is typed in correctly the first time as you will not be able to change it)

The INACTIVE button can be checked when the family is no longer active in the church, this means that the details of the family will not appear in searches.

- ➢ Enter details of the head of the family
- ➢ Add the name of any church group that member is a part of
- ➢ Fill out any skills or qualification the member has in the skills box
- ➢ Enter home address
- ➢ Enter all phone numbers and email address in which that member can be contacted
- ➢ Enter if known sacramental dates of member
- ➢ Enter all donations made by that person
- ➢ Enter any specific details about the person in the remarks box (in accordance with the data protection act 1999).
- ➢ Click SAVE

Adding Family Members

Click the MEMBERS icon.

The grey box at the top of the screen shows to which saved family name you are adding members to.

Each member is given a member ID in the same format as the family ID, this time using the members initials, in the case below it is SB/01/SMJ.

Enter all contact details for new member and known sacramental dates; Click SAVE.

Click the NEW icon at the bottom of the screen to add further members to the family.

These members' details will be stored in the grey box on the right where you can view and update details by clicking on specific entries.

Searching

Use the SEARCH icons located next to the family ID field or the Family name field to search for specific members. A grey box should appear at the bottom right of the screen displaying matches to the family name or ID entered.

Clicking on an entry will open up that family's profile where you can view or update any information for the head member;

Click the MEMBERS icon at the bottom of the screen to see the details of the family members.

Clicking on an entry will open up that family's profile where you can view or update any information for the head member;

Click the MEMBERS icon at the bottom of the screen to see the details of the family members.

Adding Other Members

This section allows you to record known details of other members that attend the church that do not belong to a family group e.g. visitors.

At homepage click FAMILIES> *Add other members.*

Enter member Id and contact details of each member

Click SAVE; Each members record will be displayed in the grey box at the top right of the screen

MODULE 2: SACRAMENTAL REGISTERS

Sacramental registers such as baptism, marriage, death records can be uploaded and stored as electronic files so that it is less time consuming to locate them.

Converting Physical Registers to an Electronic Version

In order for the registers to be digitized they must be converted to a PDF file. This can be done by using a scanner to transfer the physical registers to PDF files and onto the computer.
Data entry for Baptism, marriage, confirmation and death registers follow a similar format so apply the following process to all of them.

Hume Technologies' trained technicians are more than happy to visit your church to digitize the sacramental registers and integrate with EZRA system.
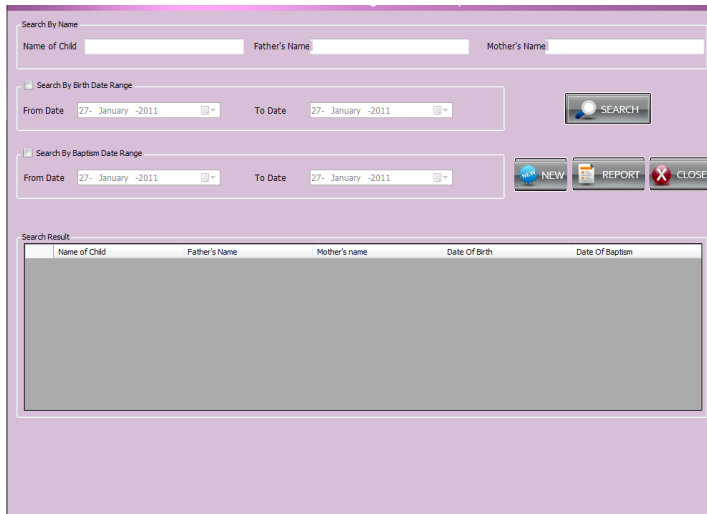
Baptism Entry

At the homepage click SACRAMENTAL REGISTERS> Baptism. You will be directed to the following screen
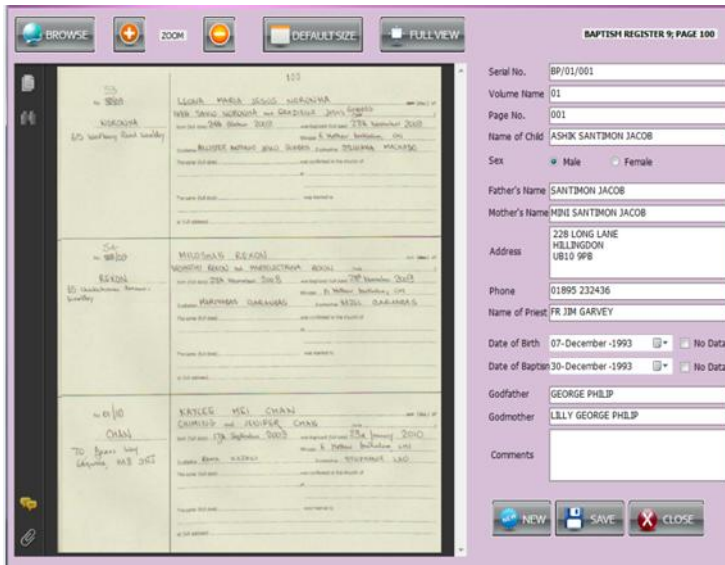
Scan all the registers to PDF files onto the computer.
Click the BROWSE icon at the top of the screen to Select the PDF file of baptism register and click OPEN.
Use the ZOOM IN and ZOOM OUT buttons to find specific data from the register to record a summary of details which will be displayed on the right hand side; Click SAVE.
Click NEW to upload a new page of the sacramental register. This summary of information can be searched and printed out.

Searching Sacramental Registers

At homepage click SACRAMENTAL REGISTERS>Baptism>BAPTISM SEARCH; Find specific registers by either searching the name of the child or the parents;
You can also search entries of registers from a specific period such as all those from a particular birth date or baptisms that occurred within a certain date range; Click SEARCH.
Entries matching the search criteria should be displayed in the grey box; Click on an entry to view the details; To print a copy of the detailed summery click PRINT. To print off the actual register, right click on it and click PRINT.

MODULE 3: MINISTRY AND EVENT SCHEDULER

This module has two sections:
1. Liturgy and Sacraments
2. Faith formation

Liturgy and Sacraments

This section of the module allows you to schedule certain services, their dates, times and who is involved. The services involved are:

➢ Holy mass
➢ Baptism
➢ Marriage
➢ Confirmation
➢ Death
➢ Anointing the sick
➢ Other events

At home page click MINISTRY AND EVENTS SCHEDULER> *Liturgy and sacraments*> HOLY MASS.

Enter details of the mass such as date, time, and venue etc and Click SAVE. Mass entries will be stored in the grey box at the top right of the screen

Adding Volunteers

Volunteers can also be added to specific masses; Click the drop down list on the VOLUNTEER field to select a volunteer role; Click on the drop down list on the NAME field to select available volunteers who are part of the volunteer role group. (Note: *In order to use the volunteer drop down list you will need to classify volunteer roles and place members in those roles. To do this, please see the HR module)*

Faith Formation

At homepage click MINISTRY AND EVENT SCHEDULER> FAITH FORMATION.

Clicking on any of these links will return the following screen where you will be able to select the faith programme, date and time of programme. Once details have been finalised click the SAVE icon and the programme will be saved and displayed on the top right grey box.

Click the drop down list on the FAITH PROGRAMMES field to select a faith programme;
Give the programme an ID,
Enter relevent details and Click SAVE. Each programme entry will be saved and displayed in the grey box at the top right of the screen.
To add members to the program, click the MEMBERS icon.

Enter the name of the 'teacher' or volunteer giving the program, CLASS NAME and CLASS ID;
Enter the names of those attending the program and Click SAVE.
These details will be saved and stored in the second grey box at the bottom of the screen.

MODULE 4: PARISH GROUPS

You can add any groups associated with the church and their members in this module.

Adding a Parish Group

At home screen click PARISH GROUPS> ADD GROUPS.
Enter the parish GROUP NAME;
Enter GROUP ID and Click SAVE; Click NEW icon to add more groups
Each group entry will be saved and stored in the grey box; Click on the MEMBERS icon in a group to add members.

Click on the MEMBERS icon in a group to add members.
Click NEW; Enter MEMBER NAME and ID.
Enter ROLE in the group and contact details and click SAVE. Member details will be saved in the second grey box at the bottom of the screen.

Reports

At home screen click PARISH GROUPS> *Reports*. Reports can be made out to certain groups so that all the members can receive important information regarding the group's activities and events.
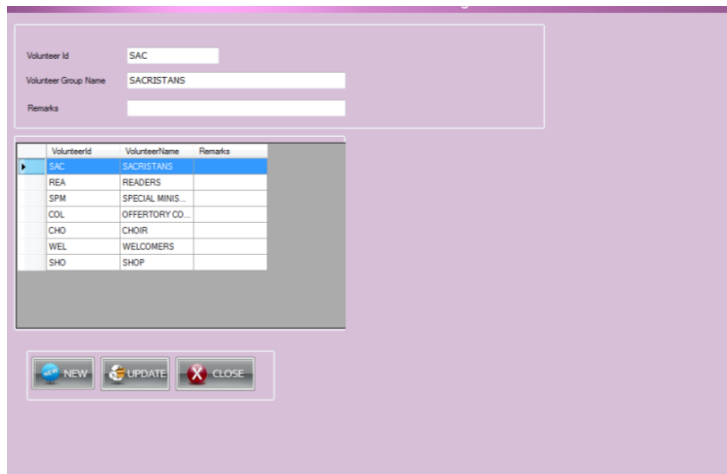
MODULE 5: HUMAN RESOURCES

This section allows you to create volunteer groups for the church as well as you can add the details of the paid staff.

Adding Volunteer Groups
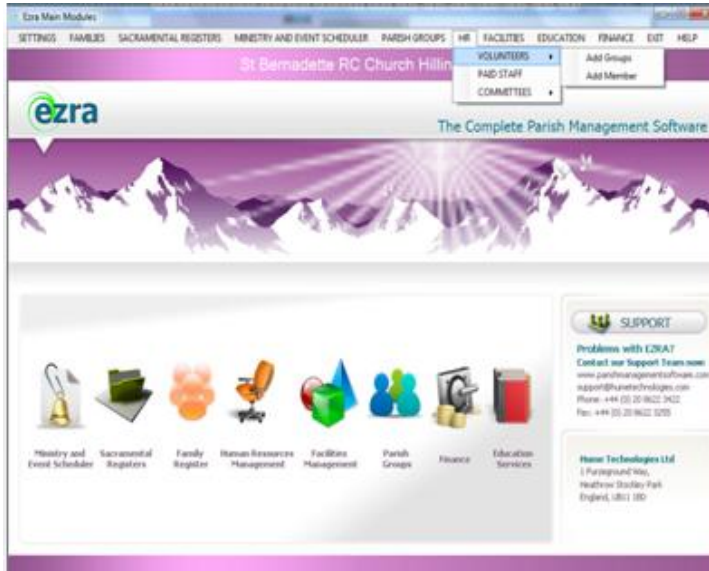
At homepage click *CLICKING VOLUNTEERS>ADD GROUPS*. You will be directed to the following screen.

Type in VOLUNTEER GROUP NAME; Give this group a VOLUNTEER ID. In the remarks field write down any details about the group e.g. their duties, times and days; Click SAVE.
To add a new volunteer group always click on the NEW icon before entering data.
Click on the saved items in the grey box to edit any duties or volunteer group names. After editing information click UPDATE to save the new data.

Adding Members to the Volunteer Groups

At homepage click HR> VOLUNTEERS> ADD MEMBER.
Click SEARCH to display a list of all the members in the church.
Alternatively if searching for specific people, either enter known FAMILY ID or FAMILY NAME;
The search will return matches in the grey box.

Click on a specific member in the list to give them their volunteer role.
Once you have selected a member click the NEW icon; click the VOLUNTEER drop down list to select one of the existing volunteer groups; Record the date of when that member has joined this volunteer group; Record the date at which this member will no longer be a part of this group when known; Click SAVE; If this member belongs to additional groups, Click NEW and select the other groups.

Click SAVE; The grey box will contain all volunteer groups that member is associated with.

Once this information has been entered and saved, Groups to which a member belongs to will appear in their family profile.

Adding Paid Staff Members

You can manage and maintain staff member's records, contact details and their attendance in this module.

At homepage click HR>PAID STAFF
At homepage click HR>PAID STAFF

Press NEW button; enter staff name and STAFF ID; enter all relevant information Click SAVE; Staff member details will be listed in the top grey box.

StaffId	staffname

Staff Id   S_1
Staff Name   Hillary Baker
Contact Details 78 From Road
Designation   secretary
Join Date   27/01/2011
End Date   06/03/2011
Start Time   8.00am
End Time   4.00pm   Daily Working Hours
Remarks

Absent Date   27/01/2011
Reason

Click on the ABSENT DATE button to record when staff members will be absent and the reason for absence; you can then be prepared to make alternative arrangements for that day; Click the ABSENT LIST button to view all the absences taken by each staff member.

Click the ABSENT LIST button to view all the absences taken by each staff member.

Adding Committees

This section allows you to create committee groups, such as finance, construction.

At homepage click HR> COMMITTEES; Enter committee name and Id; Click SAVE.
Committee entries will be saved and displayed in the grey box

Enter MEMBER NAME and ID; enter relevant data; click SAVE. To add more members click NEW and repeat above steps; All members in a specific committee group will be displayed in the second grey box at the bottom of the screen.

Reports

Click the drop down list on the COMMITTEE NAME field to choose a committee group; click the drop down list on the designation field to specify particular roles within the committee
Click the REPORT button; A list of all members matching the selected criteria will be displayed in the grey box.

MODULE 6: FACILITIES

This module allows you to manage use and availability of church facilities such as car parks, halls, meeting rooms, auditoriums etc.

Adding a Facility

At home page click *FACILITIES> ADD A FACILITY*.
Enter the FACILITY NAME and ID; Enter contact details of those in charge or involved with the facility; Click SAVE; Facility details will be saved in the grey box.

Booking a Facility

Once you have established the various facilities of the church, use the facility booking section to schedule the use of facilities for various events or services.

At homepage click FACILITIES> PARISH FACILITIES>FACILITY BOOKING.
Select from the drop down list, the facility type and name. FACILITY ID, PERSON IN CHARGE and FACILITIES fields will be filled in automatically from data that had been entered for that facility.
Enter the details of the booking such as TRANSACTION DATE, AMOUNT PAID, WHOM IT IS BOOKED BY, and their CONTACT DETAILS etc; Click SAVE; Saved entries will be saved and displayed in the grey box

MODULE 7: EDUCATION

This module allows you to record details of institutions that are associated with the church.

Adding an Institution

At home screen click EDUCATION>INSTITUTION DETAILS.
Enter INSTITUTION NAME and ID.
Click on the MEMBERS button to record which members of the church attend these institutions and their roles in the institution; Click SAVE.
All member details for that institution will be saved and displayed in the grey box to the right of the screen

MODULE 8: FINANCE

This module will allow you to keep a record of all donations being made to the church.

Donations and Collections

At home screen Click *FINANCE> DONATIONS AND COLLECTIONS*.
At home screen Click FINANCE> DONATIONS AND COLLECTIONS.
Click on the drop down list to select collection type. The drop down list to select collection mode (method of payment).
 Note: *To appoint an* ENVELOPE ID *to a family member, see the gift aid section.*

If the payment is given via envelope check the FROM ENVELOPE button. Fill the next section with the ENVELOPE ID, DATE, PARISH ID and MEMBER.
You can search ENVELOPE ID to find specific members who have been appointed a certain ENVELOPE ID. Click SAVE.
All donation entries will be saved and displayed in the grey box.

GIFTAID Master

At home screen click FINANCE> GIFT AID MASTER.
Here you can add the details of the households and enter the envelope number and other details.

Issue members of the church their own ENVELOPE ID to keep track of their donations. Click on search to list all family members in the grey box.
Click on a family and give them an ENVELOPE BOX ID.
Click SAVE
Envelope Id will be stored for a family in the second grey box at the bottom of the screen.