

Kimberley Baptist Church Database

Version 1.1

User Manual

6th February 2006

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1 INTRODUCTION

The database is an MSAccess application created for purposes of managing the contact details, family history, group memberships, visitations and attendance of the Kimberley Baptist Church. Other than the more mundane aspects of having contact details to hand the database aims to assist in identifying those members or adherents who appear to be struggling with attendance and to ensure that people do not fall between the cracks in the visitation schedule. The database also provides for maintaining group memberships i.e. who is in Bible Study A, who is in the Youth Group, catering group, audio visuals etc.

The functioning of the database will be explained by working through all the individual screens.

1.1 CONTACT DETAILS

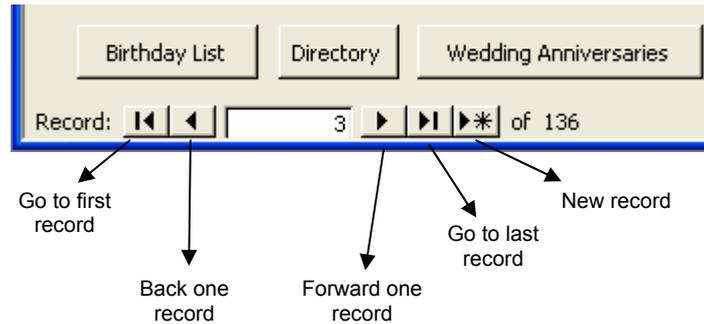
Please feel free to call if assistance is required.

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2 DATABASE BASICS

2.1 MOVING THROUGH THE DATABASE

- a) Use the navigation buttons to move through the database one record (family) at a time.



- b) Use the “Find” button (circled red). First place your cursor in the field you want to search then click “Find”. It is a common mistake when searching that the user does not first put the cursor in the field being searched.



- c) Use the “Find Name” dropdown. Pick a name from the dropdown list and the form will jump to that name.

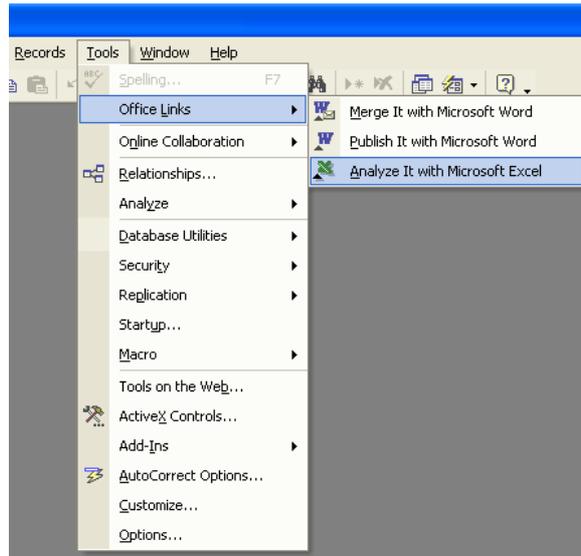
2.2 SAVING & REFRESHING

There is no need to save in MSAccess. A record is automatically saved as soon as you move out of that record.

Sometimes you may enter a new record but it doesn't show up in another report or form – this is usually just a refresh problem. Say for instance you enter a new visit record and then click the “Quarterly visit report” and the record doesn't appear – close the report, then click Records>Refresh in the menu and reopen the report.

2.3 EXPORTING TO EXCEL OR WORD

This is something the user may wish to do after, for example, clicking the “Name List” button. Open the report you wish to export then in the menu click Tools>Office Links>Analyze it with Microsoft Excel (or Publish it with Microsoft Word)



3 STARTUP – CURRENT STATUS

When the application starts the first window to appear is the “Current Status” window as shown below. Click OK to proceed. Note that you can hover the cursor over the labels for more information

Current Status		Hover cursor over label for more info			
Kimberley Baptist Church		Male		Female	
Current Status					
1.Members	89	39	44%	50	56%
2.Active persons includes members + non-members	210	93	44%	117	56%
3.Persons on Directory	232	107	46%	125	54%
4.Total number of people on this database	312	139	45%	173	55%

5.Average morning service attendance over the last year	114				
6.Average evening service attendance over the last year	45				

7.Total persons belonging to at least one active group	85	32	38%	53	62%
8.Total active persons not in any group	125				

9.Inactive members	5				
10.Active non-members	126				
11.Active adult non-members	65				

Figure 1: The Current Status window

4 THE FAMILY TAB

This is the screen that first appears when starting up and is also available by clicking on the “Family” tab as circled in red in Figure 2 below.

Unique family number – just for the database really

The Deacon appointed to monitor this family

Some current statistics

Exit the application

If this is ticked then the family will appear in the printed directory and birthday list

If the year of the anniversary is not given then enter it as 1900

Order: Head of the family = 1, spouse = 2, children = 3 etc

Member: tick only if a certified *bona fide* member.

Active: tick if the person is an active or regular participant in church activities

Birthday: if the birth year is not given then at least the day and month must be entered as dd/mm

Enter any significant events or general comments on the life of the family in this area. A date is mandatory

To add more groups

Whichever name you click on in the “Family Members” list will display which groups they belong to

Figure 2: The Family tab

4.1 FAMILY UNITS AND FAMILY ORDERS

Family Members							
Ord	Mem	Activ	First Name	Birthday	Gender	MembStartDate	
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mark	05/12/1964	M	16/02/2000	
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Jo-anne	02/08/1969	F	16/02/2000	
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jennifer	22/11/2000	F		
4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Timothy	03/03/2000	M		

Typically a “family” is understood to mean father, mother and children, but anybody may form their own stand alone family unit for purposes of the database. For example a person still living with their parents may be entered as their own family unit.

Everybody within that family unit must have a “Family Order” number – this is a mandatory field. Typically the father would be 1, mother 2, children 3 etc. A single person forming their own family unit would have a family order of 1. A single parent would have an order number of 1 whilst their child(ren) would be 3, 4, 5 etc – there would be no #2 in this case.

The concept of a family order number has application in the Directory and the Attendance List as detailed elsewhere below.

4.2 MEMBERSHIP STATUS

Family Members							
	Ord	Mem	Activ	First Name	Birthday	Gender	MembStartDate
▶	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mark	05/12/1964	M	16/02/2000
	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Jo-anne	02/08/1969	F	16/02/2000
	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jennifer	22/11/2000	F	
	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Timothy	03/03/2003	M	

The “Member” tick box should only be ticked for true, certified members, not adherents. If the membership commencement date is known this can also be entered in the relevant field.

In general, if a person joins another church or moves to another town then they are no longer considered to be a member of KBC. There may be sensitivities around this issue so discretion is advised.

4.3 ACTIVITY STATUS

Family Members							
	Ord	Mem	Activ	First Name	Birthday	Gender	MembStartDate
▶	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mark	05/12/1964	M	16/02/2000
	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Jo-anne	02/08/1969	F	16/02/2000
	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jennifer	22/11/2000	F	
	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Timothy	03/03/2003	M	

If a person is considered to be an active attendee then this block is ticked. An active person would be one who we see at services, participates in various groups or functions – we see them around. This is a subjective assessment with no defined criteria.

4.4 BIRTHDAY

Family Members							
	Ord	Mem	Activ	First Name	Birthday	Gender	MembStartDate
▶	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mark	05/12/1964	M	16/02/2000
	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Jo-anne	02/08/1969	F	16/02/2000
	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jennifer	22/11/2000	F	
	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Timothy	03/03/2003	M	

This field can be left blank, but if a birthday is entered then it can be either the full date (dd/mm/yyyy) or just the day and month (dd/mm)

4.5 WEDDING ANNIVERSARIES

If the year is not given then use 1900 i.e. an anniversary given as 18th March enter to the database as 18/03/1900.

4.6 FAMILY DEACON

A deacon is allocated to each family. Choose from the drop down list. Only the names of deacons as allocated in the Group Memberships table will appear in this drop down list. If the deacons name does not appear in the drop down then it is because they have not been allocated to the Deacons group.

4.7 GENDER

Family Members							
	Ord	Mem	Activ	First Name	Birthday	Gender	MembStartDate
▶	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mark	05/12/1964	M	16/02/2000
	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Jo-anne	02/08/1965	F	16/02/2000
	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jennifer	22/11/2000	F	
	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Timothy	03/03/2003	M	

This is a mandatory field and will only accept the letters “M” of “F”.

4.8 GROUP MEMBERSHIPS

Family Members							
	Ord	Mem	Activ	First Name	Birthday	Gender	MembStartDate
▶	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mark	05/12/1964	M	16/02/2000
	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Jo-anne	02/08/1965	F	16/02/2000
	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jennifer	22/11/2000	F	
	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Timothy	03/03/2003	M	

Click on a persons name and their group memberships will appear in the list

Group Memberships *				
	Group	Type	Category	Comment
▶	Deacon	Church Leade	Active Group	
	Krug Bible Stuc	Bible Studies	Active Group	
	Sound & projec	General	Active Group	
*				

Groups can be defined by the user as required and are categorised in three levels as illustrated in Figure 3 below (Category, Type, Group). At the time of writing there are only 2 categories defined viz. “Active Groups” (those groups currently on the go) and “40 Days: Expressions of Interest” (people who are not yet members of a group, but who expressed

interest in belonging to one). New groups can be inserted by clicking on the button with the asterisk circled in red above.

NOTE: Please be very careful of spelling when entering new groups. Lets say that you want to enter a new Bible Study Group called “Bloggs Bible Study”. You should assign it to the category “Active Group”, type “Bible Studies” and group “Bloggs Bible Study”, but if you mistakenly assign it to a type “Bible Study” (different spelling) then computers, being what they are will think that “Bible Studies” and “Bible Study” are two completely different types of group. First check what spelling was used elsewhere and stick to that spelling. This can be tied down so such errors can’t happen, I just didn’t get round to it.

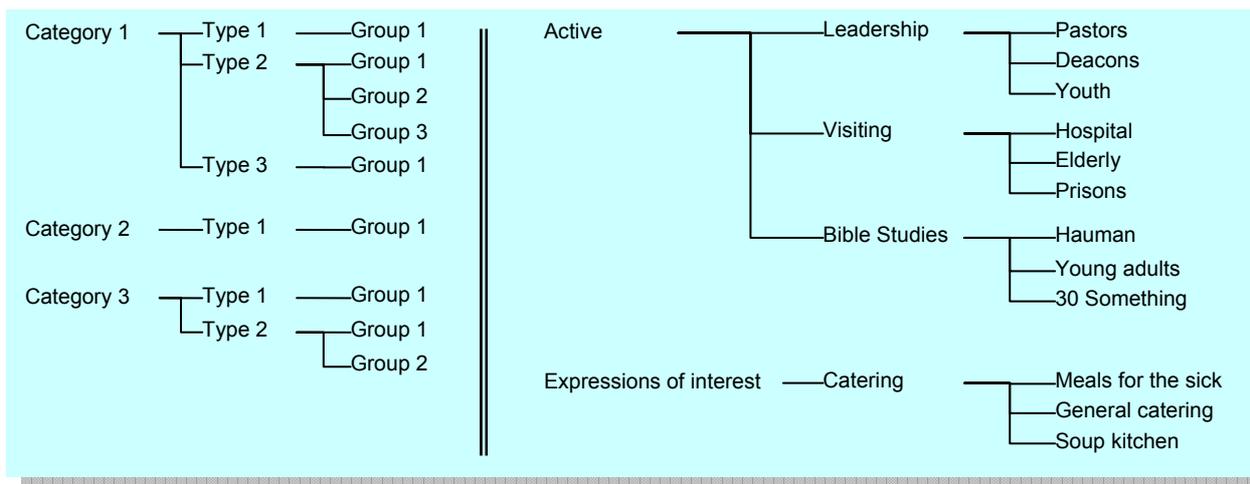
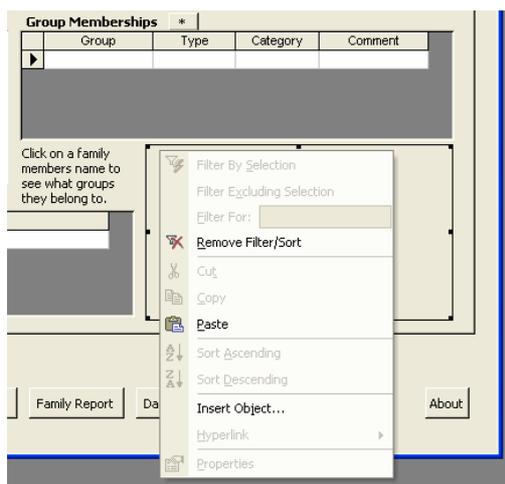


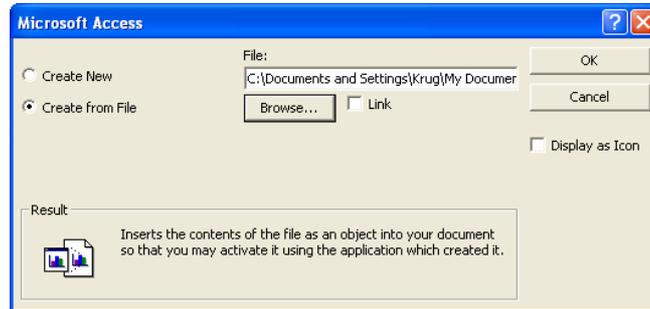
Figure 3: Illustration of the general schema used for categorising groups and an example of how it’s applied.

4.9 INSERTING A FAMILY PHOTO



Right-click in the blank area where the photo should be and choose “Insert Object”, then choose “Create from file” and browse to find the file making sure that the “Link” and “Icon” radio buttons are not selected as shown below. Images should not be larger than 300 x

225. This is adequate resolution to be large enough for clarity whilst keeping the size down.



5 THE VISITS TAB

For monitoring of visits to families (not individuals) to ensure that families do get visited, that none are left out or that some are not preferentially visited. If a visit is made to Mrs Bloggs as an individual then the entry is made against family Bloggs.



Clicking on the quarterly and yearly visit report brings up a list of families and how many times they have been visited that quarter or year.



The blank visit form can be printed out to be filled in by hand after a visit. The office secretary then enters the information on the form to the database.

All of this relies on communication – if no visitors fill in a form and hand it to the secretary there will be record.

Currently, the Quarterly and Yearly visit reports only report visit statistics for members only – this can easily be changed.

ffamily : Form
 Kimberly Baptist Church
 Members & Adherents Directory

Find Name: Find

Family Name: 144

Family Visits Attendance

Date	Visited By	Comments
27-Jun-2005	Hauman, +Eric	This is a test this is a test to see how this works is a test this is a test to see how this works is a test this is a test to see how this works is a test this is a test to see how this works is a test this is a test to see how this works
15-Aug-2004	Hauman, +Eric	This is a test this is a test to see how this works is a test this is a test to see how this works is a test this is a test to see how this works is a test this is a test to see how this works is a test this is a test to see how this works
01-Feb-2004	Hauman, +Eric	This is a test this is a test to see how this works is a test this is a test to see how this works is a test this is a test to see how this works is a test this is a test to see how this works is a test this is a test to see how this works
*		

Quarterly Visit Report Yearly Visit Report Blank Visit Form

Note: Visit reports are for members only

Record: 73 of 136

qVisit_Quarterly_Crosstab : Crosstab Query

Family	TotalVisits	2003Q3	2004Q1	2004Q2	2004Q3	2005Q2	2005Q3
Ahlschlager +Brandon / +Karin	3			1			2
Anderson +Mark / +Tania	1	1					
Bailey +Daphne	0						
Bailey +Raymond / +Elise	0						
Barnes +Leonard / +Lavarene	0						
Berlyn +Peter / +Stephanie	0						
Berndt +Raymond / +Mariane	0						

Record: 1 of 58

qVisit_Yearly_Crosstab : Crosstab Query

Family	TotalVisits	2003	2004	2005
Ahlschlager +Brandon / +Karin	3		1	2
Anderson +Mark / +Tania	1	1		
Bailey +Daphne	0			
Bailey +Raymond / +Elise	0			
Barnes +Leonard / +Lavarene	0			

Record: 1 of 58

Kimberly Baptist Church
 Visit Report

Who was visited: _____

By whom: _____

Date & Time: _____

Reason for visit: _____

Comments: _____

Please hand completed report to the Office Secretary

Figure 4: The Visits tab

6 THE ATTENDANCE TAB

The screenshot shows the 'fFamily : Form' window for family 94, Ahlschlager. The 'Attendance' tab is active, displaying a table with columns 'FirstNames' and 'ServiceDateTime'. The table lists Brandon and Karin with service dates of 11/09/05 10:00. Below the table are buttons for 'Add Attendance', 'Annual Attendance %', 'Monthly Attendance Graph', and 'Blank Attendance Form'. A 'Name AttendSelect' dialog box is open, showing a list of family members with checkboxes and a date/time selector. A 'qAttendance_Perc_Year_Crosstab' dialog box shows a table of attendance percentages for the years 2005-2008. A 'Monthly Attendance' line graph is also displayed, showing attendance trends for Members, Visitors, Children/Teens, Unspecified, and Total from 2005 to 2008.

FamilyID	FullName	2005	2006	2007	2008
94	Ahlschlager, +Brandon	11%			
94	Ahlschlager, +Karin	11%			
95	Anderson, +Mark	11%			
95	Anderson, +Tania	11%			
96	Anderson, Margaret	44%			
97	Bailey, +Daphne	33%			
98	Bailey, +Elise	67%			
98	Bailey, +Raymond	11%			
99	Barnes, +Lavarene	22%			
99	Barnes, +Leonard	22%			

Figure 5: The Attendance tab

When clicking on the Attendance tab an attendance list is shown for members of the family. Note that you cannot add new records in here, that you must do by clicking on the “Add Attendance” button as described below. You can, however, delete an attendance record here. To do this select the entire row you wish to delete by clicking in the grey block to the left of the name and press the Delete key on your keyboard.

Blank Attendance Form

Print out an attendance form to be filled in by a deacon who will note attendees at the service. Only persons whose family order is 1 or 2 and whose family is marked for entry to the directory will appear on this list.

Add Attendance

Once the form has been filled in by the deacon it is handed to the office secretary for entry to the database.

Tick off the names of those on the form, enter the number of visitors, teens & children, the date and time of the service in 24 hr format i.e. 16/10/05 10:00, add any comments if so desired and then click “Add to Register”. If you forget to add someone and come back later to do it then first use the navigation buttons to find the date and time of the service previously entered, tick off the extra persons name and click “Add to Register” again.

Annual Attendance %

Produces a report of percent attendance per year. There are two services a day, if you attend only one service a day that would be 50% attendance.

Monthly Attendance Graph

The monthly attendance graph shows the total attendees for the whole month for both services.

7 REPORTS

7.1 DIRECTORY

Directory

Only families for whom the “Directory & birthday list” box (on the Family tab) is ticked will appear in the printed Directory. An excerpt from the directory is shown below. The names at the top are arranged in order of “Family Order” and a “+” indicates that they are a member

Krug - +Mark +Jo-anne Jennifer Timothy			
40 Milner St	053 831 5362 (h)	krug@intekom.co.za	28-Jan-95
Belgravia	083 739 7399 (Jo)		
Kimberley	083 457 5078 (Mark)		
8301			

7.2 BIRTHDAY LIST

Birthday List

Only families for whom the “Directory & birthday list” box (on the Family tab) is ticked will appear in the printed Birthday list. An excerpt from the Birthday list is shown below. A “+” indicates that they are a member.

January

- 05 Bronwyn Hugo
- 07 +Bill Cahill
- 16 +Hettie Hall
- 23 +Ethne Papenfus
- 23 +Gilbert Sheares
- 26 +Eleanor Burns
- 26 Piet Snyman

7.3 WEDDING ANNIVERSARY LIST



An excerpt from the Wedding Anniversary list is shown below. Note that a year of “1900” merely says that no year was given.

January

- | | | |
|----|----------------------------|------|
| 06 | Lemmer +Les / +Marie | 1951 |
| 15 | Sheares +Gilbert / +Pamela | 1900 |
| 19 | Burns +Murray / +Eleanor | 1974 |
| 28 | Henri +Dennis / +Karin | 1989 |
| 28 | Krug +Mark / +Jo-anne | 1995 |

7.4 GROUP MEMBERSHIPS



One of the main drivers for creating this database was the number of requests to the office secretary for lists of names for this group or another – this led to the same lists being typed up time and again for different reasons.

To print a group list click on the “Group Memberships” button and the dialog box shown below will pop up.



You must start at the top and pick the Category, then Type, then Group that you want. If you pick a Category of “Active Groups” then only types belonging to “Active Groups” will appear in the “Type” drop down. As you select items a button will appear on the right to

open the report. Note that if you wanted to print a list of all Active Groups then you simply pick “Active Groups” from the Category and nothing else as illustrated below.

The “Find Groups within Groups” button can be used to, for instance, find all active Youth who also occur in “40 Days: Expressions of Interest”.

7.5 FAMILY REPORT

Family Report

The Family Report is intended as a resource for Pastors and Deacons or visitation teams who may, for instance, first wish to brush up on a family history before visiting them. It provides a printed report with the following items:-

- Contact details
- Family members – birthdays, membership & activity status
- Significant events in the family
- Group memberships of all family members
- Visitation history and the days since the last visit.
- Attendance statistics

7.6 NAME LIST

Name List

The name list provides a tabular or spreadsheet type format with details for all persons on the database.

Other than the usual defined groups entered to the database the user may need to prepare an *ad hoc* list of people not in any particular group. This list can be exported to Excel and the unwanted names and fields deleted.

7.7 OTHER REPORTS

Other Reports

Clicking this button brings up a further form as illustrated below.

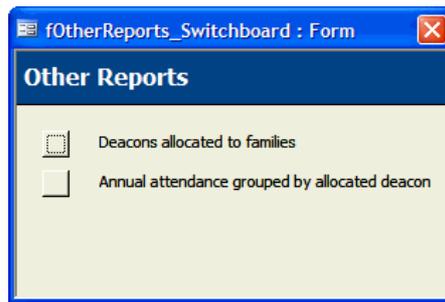


Figure 6: The Other Reports form

The “Annual attendance grouped by allocated deacon” report produces a list of names and their attendance figures grouped by the deacon allocated to look after that family as illustrated below.

<i>Attendance : Grouped by Allocated Deacon</i>											
<i>FullName</i>	<i>2004</i>	<i>2005</i>	<i>2006</i>	<i>2007</i>	<i>2008</i>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>
<i>Andy Wingreen</i>											
Anderson, +Mark	17%	26%	25%								
Anderson, +Tania	24%	32%	38%								
Bhika, +Iris	33%	51%	63%								
Bhika, +Vincent	34%	48%	75%								
Bhika, +Vincentia	34%	49%	75%								
Blight, Denise	63%	46%	50%								
Blight, Tim		2%									
Burger, Louisa	45%	60%	63%								
Coltman, Jenny		1%									
Erasmus, Louise		5%	13%								
Farthing, Angela		1%									

Figure 7: Example of report “Attendance Grouped by Allocated Deacon”

7.8 VISIT REPORTS

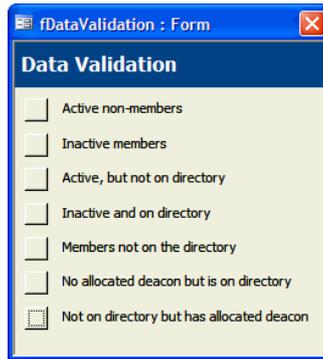
See Section 5 above.

7.9 ATTENDANCE REPORTS

See Section 6 above.

8 DATA VALIDATION

Clicking this button brings up the form below.



Use these lists to weed out errors in data entry. For example if you click on the “Active, but not on directory” button you may see Joe Bloggs listed there, but they really should be on the directory – you can then make the correction.