excellerate™

Cell Church Management Software

User Manual

Version 3

Micro System Design

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Table of Contents

Chapter 1: Installation **9**
System Requirements 9
Installing Excellerate 9

Chapter 2: Getting Started **11**
Creating your New Database 11
Program Registration 12
New Database Preferences 13
Logging in 16
Setup Wizard 16
Picklists 19
Zip Codes 21
Member Steps 22
Member Profiles 23
Check for Duplicate Members 23

Chapter 3: Getting Around **25**
Main Screen 25
Tool Bar 26
Browse Screens 27
Views 27
Tagging specific records 28
Quick Searches 28
Status Bar 28
Getting Around in Edit Screens 29
Associated Info Tabs 30

Chapter 4: Pre-Members, Members and Pastors **31**
Member Screen 33
Member Addresses 36
Members - Associated Information Tabs 37
Adding Members 40
Adding Family Members 41
Editing Member Information 41
Deleting Members 41
Searching for Members 42
Pre-Members 43

Chapter 5: Cells **45**
Cell Screen 46
Cells - Associated Information Tabs 49
Representing Your Cell Structure in Excellerate 51
Adding Cells 55

Editing Cell Information....57
Deleting Cells....57
Assigning Members to Cells....57
Moving cell members....58
Primary and Secondary Cells....59
Searching for Cells....60
Multiplying a Cell....61
Viewing Cell Growth....62
The Cell Tree – A Better View of Your Cell Structure....65
The Cell Organizational Chart....67
Entering Cell Meeting Totals and Attendance....68
Updating Cell Meeting Totals....70
Example of a Typical Cell Week....72

Chapter 6: Classes....73
Traditional classes:....74
Post-Encounter / School of Leaders classes:....76
Barcode attendance tracking....78

Chapter 7: Organizations....79
Organization Screen....80

Chapter 8: Church Attendance....81

Chapter 9: Contributions....83
Contribution Settings....84
Contribution Security....86
Contribution Types....87
Contribution Accounts / Funds....87
Contribution Records....88
Pledges....89
Entering Contributions (Batch Processing)....89
Loose Cash....93
Updating Batches....93
Reverse-Updating Batches....93
Viewing/Editing Member Contributions....94
End of Period Processing....94
Exporting Contributions....95
Resetting Contribution Totals....95
Removing Old Contributions....95
Removing Old Locks....96

Chapter 10: Views....97
What are Views?....97
Selecting Views....98
Creating a New View....98

Editing a View 100
Importing, Exporting and Downloading Views from the Web 102
Advanced Views 102

Chapter 11: Reporting 105
Reports and Views 105
Report Styles 106
Member Reports 107
Cell Reports 113
Class Reports 118
Organization Reports 119
Contribution Reports 120
Custom Reports 125
Mail Merge 131

Chapter 12: G12 Specifics 133
Win - The Prayer for three 133
Consolidate – Keeping the harvest 133
Disciple – Developing leaders 134
Send – The 12, 144, 1728, … 135

Chapter 13: Internet Integration 136
Web Integration 136
Setting up Web Integration 136
Using web integration 139
Modifying Web integration to fit your web site 147
List of Excellerate's Web Integration Files 154
EMAIL 155
Setting up EMAIL 155
Using EMAIL 157
Merge-Fields In EMAIL 158
EMAIL-ing Reports 158

Chapter 14: Utilities and Preferences 161
Change User Password 161
Set Database Password 161
Remove Members 161
Remove Old Contributions 162
Re-Index / Compact Database 163
Remove Old Locks 163
Edit History Fields 163
Edit Required Fields 163
Update Cell Meeting History 164
Enter Church Attendance 164
Setup Wizard 164

Flex Fields 164
Preferences 167
Users and IDs 172
Importing and Exporting 174
Importing Church Attendance with Barcodes 176
Importing Post-Encounter / School of Leaders Attendance with Barcodes 179

Appendix 181
Browse Columns 181
Member Pictures 181
Report Styles 181
Backing Up 186
Technical Support 186

Chapter 1: Installation

System Requirements

Minimum requirements:

Pentium class PC running Windows 95/98/NT/2000/XP.
200 MB free disk space, 32MB RAM
Screen resolution of 800 X 600 or better

Recommended requirements:

Pentium class PC running Windows 2000 or XP.
500MB free disk space, 256MB RAM

Network / Multi-user requirements:

Any network environment such as Novell, or Windows NT, that supports workstations running Windows 95 or above, where the main database file can be stored in one central location accessible by the users.

Installing Excellerate

Close any running programs before installing Excellerate.

Single Computer Installation:

To install Excellerate, simply insert the CD into your CD-ROM drive, and the setup program will start automatically. If Autorun is disabled on your computer, then from the **Start Menu, Run** command, type: **D:\SETUP** (where D: is the letter of your CD-ROM drive.)

After the installation program completes, Excellerate will be loaded on to your computer, and accessible from the Start Menu, or desktop icon.

Network Installation:

Excellerate's recommended network setup is to have the application installed on each workstation. These workstations would then reference the database located on a file server.

Installation

First, install the application on the file server as in the previously described Single Computer Installation. For some file servers, you may have to actually run the installation on one of the workstations, but specify the file server's drive designation (such as N:) when prompted for where to install Excellerate. Make sure that the directory you install Excellerate on is accessible to all of the workstations that will be using the program. Once installed on the file server, run Excellerate, and create your new database. Next, install the application on each workstation in the same manner, but when prompted to create a new database, choose Open other database and open the database that you just created located on your file server. When prompted if you would like this to be your default database, answer yes.

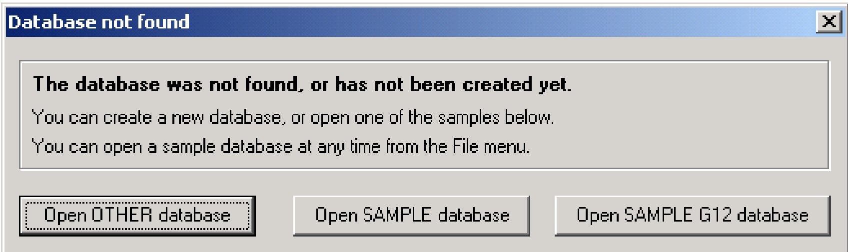
Actually, the only files needed on the file server are the database, which will have a .MDB and .CFG extension, the report styles with .QR extension, and the Pictures directory (See Member Pictures). **Make sure your report styles are copied to the file server**, otherwise, many of the reports will not work.

If you have a previous version of Excellerate, make sure all computers are upgraded to the same version of the software.

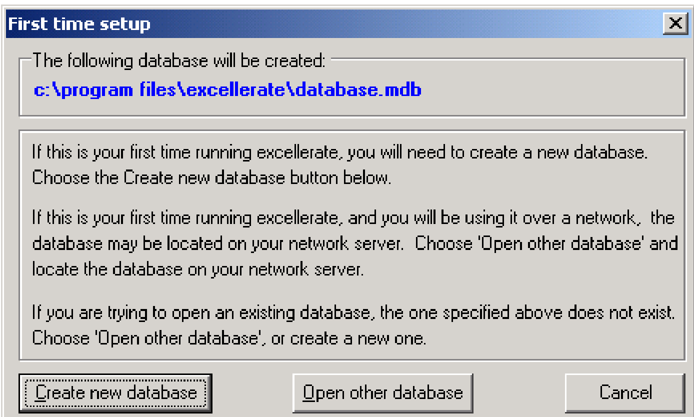
Chapter 2: Getting Started

Creating your New Database

The first time Excellerate is started, if a database has not been created yet, you will see the following screen, which allows you to open a new database or one of the sample databases:



To create a new database, select the Open OTHER database button.

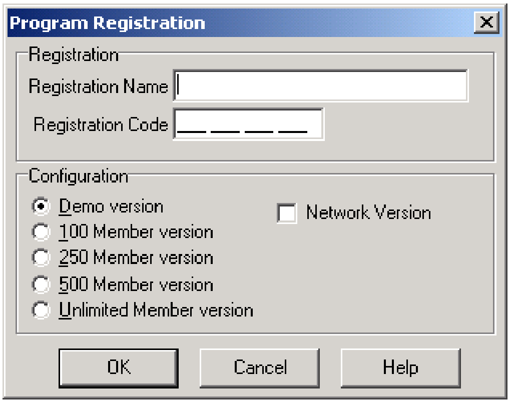


For a single-user setup, choose Create new database. If this is a multi-user network setup and the database has already been installed on your file server, choose Open other database, and locate the database on the file server.

The ID and password for your new database is "MANAGER," and the USER ID is "SETUP". This ID gives you full access to all program functionality. You may and should change the password to prevent unauthorized users from having full access.

Program Registration

After creating the new database, you will be prompted to enter the registration code, which activates the full version of the program. Your registration code is located on your invoice and inside the front cover of your user manual, or if you downloaded the program from the Internet, your code would have been emailed to you.



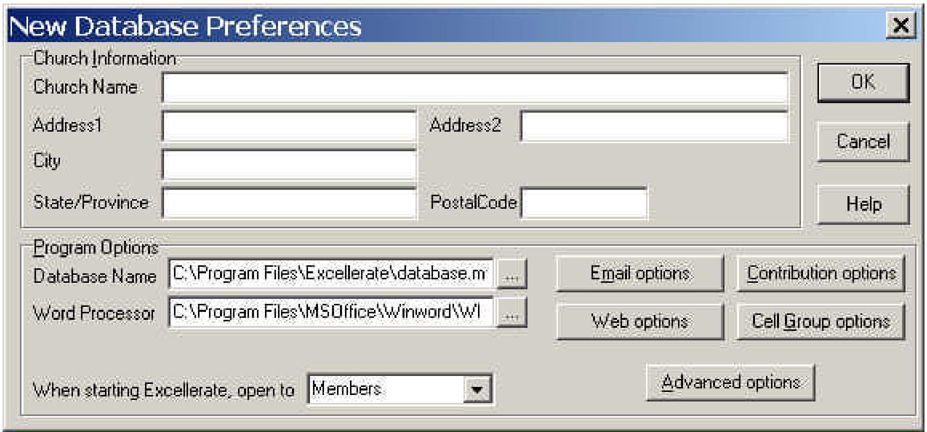
The Registration Name and Registration Code must be entered exactly for the program to register correctly.

The **0's** in the registration code are **Zero's**. Choose the configuration that you purchased: 100, 250, 500, or Unlimited Members, and select Network Version if applicable.

Without registering the program, it will operate as a demo, limiting you to 30 members and cells. You can also access the registration screen from the Utilities menu.

New Database Preferences

Any time a new database is created, you will immediately be taken to the New Database Preferences screen:



This screen allows you to define the specific attributes of your church.

Church Information – Enter your church name and address information. This information will appear on reports and other printouts from the program.

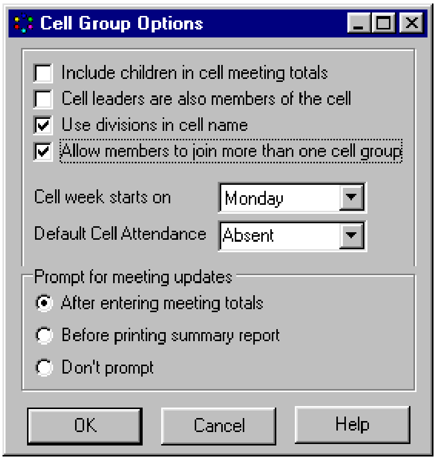
Database Name – You can create several databases within Excellerate. This is useful if you want to have a training database separate from your main database, or for keeping multiple congregations separate form one another. The Database Name option allows you to specify which database to automatically open when starting Excellerate. Typically this would be your database.mdb located in the directory where you installed Excellerate, but if you are using the network version, this will be the database on your file server. (This is a local option that only affects this workstation)

Word Processor - If you would like Excellerate to automatically start your word processor for mail merges, enter the full path to your word processor. (This is a local option that only affects this workstation)

Open To Module – Specifies the module that you want to see first when the program is started. This may vary from person to person, depending on their job duties. (This is a local option that only affects this workstation)

Cell Group Options

The Cell Group Options screen contains preferences for your groups:



If you want children included in your cell group meeting totals, then check the first box. There is a separate total for children as well, but if you want them totaled with the member and visitor counts, then select this option.

If your cell leaders are considered members of the cell they lead and should be counted there as members, then check the second box. A member may be a leader of as many cell groups as they want.

If you wish to have your cell groups named by the combination of divisions they represent, then check the third box in this section. For example, if Matt is a cell leader in District 1, Zone A, Section 5, Cell B, then you may choose to name his cell "1-A-5-B." In this case you would check the "use divisions in cell names" box. If you don't want the divisions included in the cell name, for example, names like "Teen Life" or "Matt's Cell," you would leave the third box unchecked.

What is a division? Essentially, "division" is the generic term used in Excellerate to describe the levels within your cell structure, such as District, Zone, Section, or Network, Generation, 144, etc… Some churches may include Campus, or part of the city as one of their divisions.

If you wish to allow your members to join more than one cell group, check that box.

The next field in this section allows you to specify the day of the week that your church has designated as the beginning of the cell week. This may differ depending on the specific situations of each church. This option is used when displaying the pop-up calendars for entering dates referring to cell weeks.

You can also specify how you want to default the cell member attendance. You can choose to default member's attendance to Present, Absent, Use last week's attendance, or to turn off cell attendance.

The Prompt for meeting updates option specifies when you would like the program to remind you to run the update for cell meeting totals. In order to be able to track your churches cell growth, you will enter weekly cell meeting totals into the system. This usually consists of entering the number of members, visitors, etc… for each cell. You must also record that certain cells did not meet, or did not turn in a meeting report. The update for cell meeting totals option goes through your list of current, active cells (after you've made any cell information changes and entered your meeting totals) and makes sure you've made an entry for each cell. If not, the update will automatically make an entry for you indicating that the cell did not turn in a report. You can then print a list these cells if you need to follow-up with them. It is OK if some cells don't turn in a report, but the system must have an entry for each cell every week, and the update ensures this.

Contribution Options

Before using the contribution module, you should verify several program options within Excellerate to ensure they are set according to your church operation. See the section on setting up contributions in the contribution chapter of the manual.

Email Options

Excellerate has the ability to send email messages. You will need to have an SMTP outgoing mail server to take advantage of this feature. See the section on setting up email in the Internet Integration chapter of this manual.

Web Options

The web integration feature allows you to integrate data from Excellerate with your church web site. See the section on Setting up Web Integration in the Internet Integration chapter of this manual.

Advanced Options

See the chapter on Utilities and Preferences for information on the advanced options.

Logging in

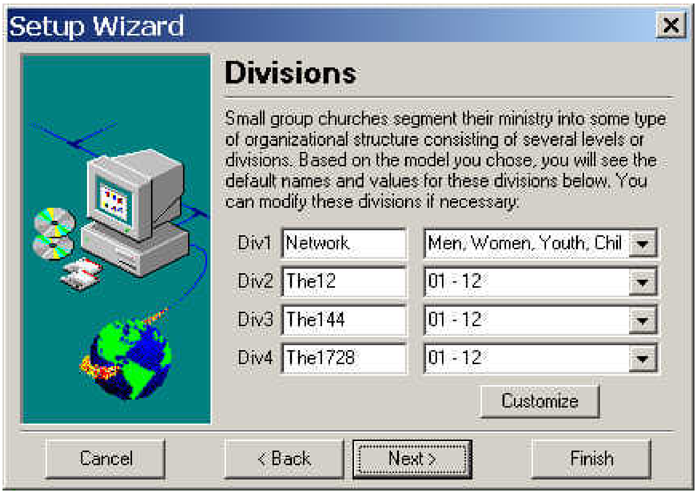
Once you've setup your preferences and users, you can now log into the system:

The login screen prompts you for your User ID and password. The default User ID is MANAGER and the password is SETUP. The logon prompt shows you the database that you are logging in to. If you wish to log into a different database you can hit the ... button, which will prompt you for a database.

Setup Wizard

If this is the first time logging into this database, the Setup Wizard will start and walk you through a quick and easy configuration process.

The first screen asks which type of cell model your church most closely resembles. This will setup the cell structure and naming for that model. If necessary, you can make adjustments to the default structure.



The Divisions screen defines the possible picklist values for the cell structure naming convention. The values will be defaulted based on the cell model chosen, and can be customized here. For help on customizing these settings, see the section on Picklists later in this chapter.

This screen defines the member development steps that you expect your members to go through. Choose Customize to modify these steps. For help on customizing these settings, see the section on Member Steps later in this chapter.

This Picklist screen allows you to customize the other picklist values. See the section on picklists later in this chapter for information on customizing the picklists.

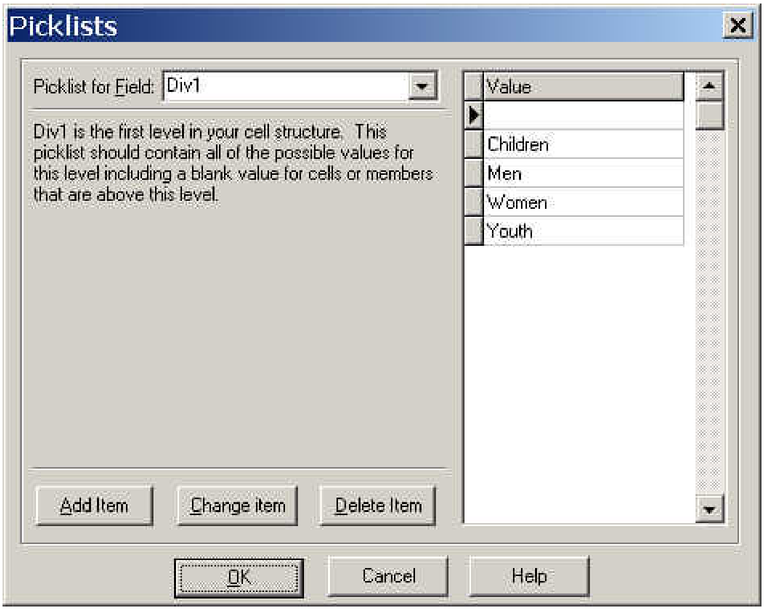
If you chose G12 cell model, you will have the option of installing the School of Leaders module. This module allows more detailed tracking of information for Post-Encounter, and School of Leaders classes. This module is implemented using flex-fields which allows you modify the implementation as your needs evolve.

At this point, your database is configured and ready to use. If you want to further customize the settings, the following sections will describe how.

Picklists

Picklists are handy lists that pop up when entering information into certain fields. For example, when you need to enter a district for a cell report, you can choose it from a list instead of typing it. These picklists are defined by first choosing the field for which the picklist belongs, and then Add, Change, or Delete the values for that list. Most picklists will already have some common values entered. You may just need to review these values to make sure they are appropriate for your church.

To customize the picklist values used in the program, go to Options, Picklists.

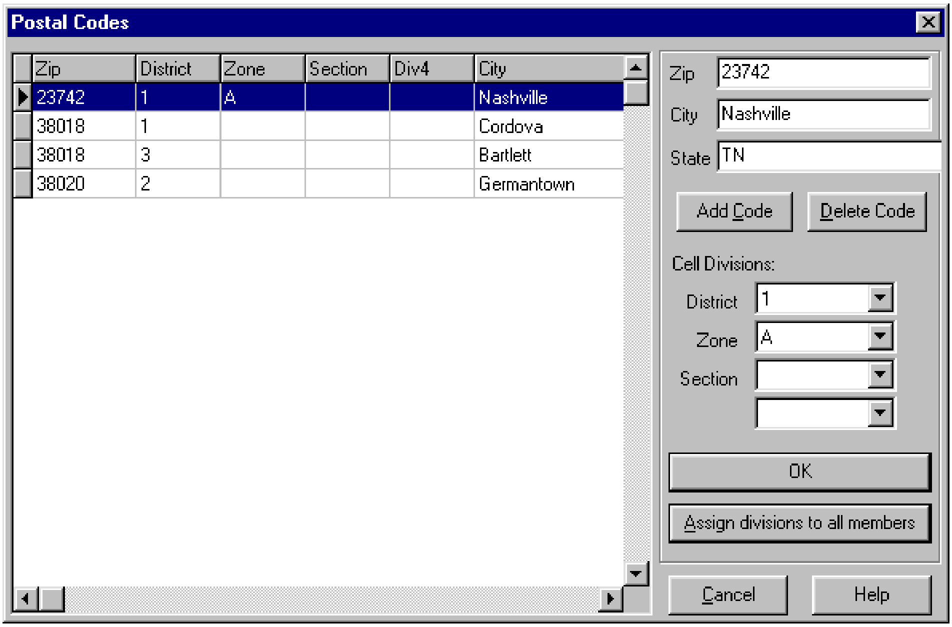


To add new entries to a picklist, first choose the field for which the entries apply using the 'Picklists for Field' selection. Then use the 'Add Item 'button to add the entries for that field.

The same procedure is used for changing or deleting entries except you would use the appropriate button.

Zip Codes

The next setup step to complete is the zip code table:



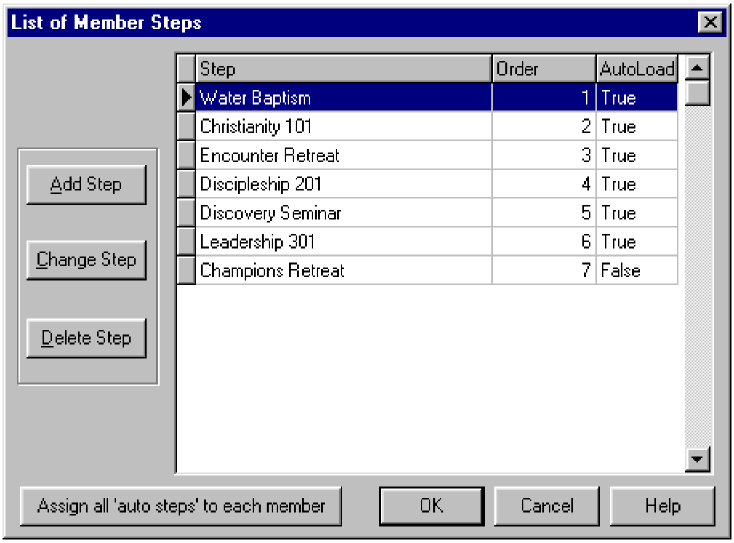
By entering the zip codes your church anticipates using, along with their corresponding city and state, Excellerate can automatically enter the city and state for you when pre-members or members are added to the system. The program can also automatically assign those members to a specific division, (not a specific cell) based on their zip code. This may, for example, prove helpful in assigning people to follow up with first-time visitors to a church service. The visitor's zip code would automatically put them into a division, and someone from that division could maintain contact with them. Although they may not remain in that division upon becoming members, they have a point of contact from the church that is specific to their area.

Simply hit the "Add Zip" button to enter a new zip code, and the corresponding divisions.

You may also add zip codes as you use the program during member entry.

Member Steps

Member Steps is also accessed from the Options menu:

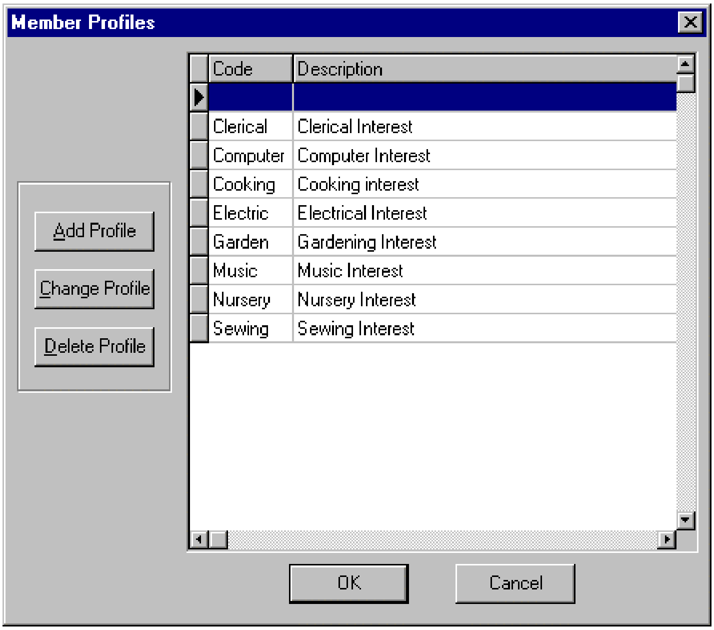


The Member Steps option allows you to enter the “Steps” or “Levels” a member may go through in their spiritual development process. These are milestones in a member’s development, so a class may be a step even though there is another module for entering more details on each class.

Whether your church has a highly defined system of discipleship classes or one that is more open-ended, the Member Steps option will be useful. You may add steps at any time to this list. You may also designate different steps as Auto-Load steps. All Auto-Load steps can be loaded for a member at once so that it is easy to see which steps have been completed, and which steps have not.

Member Profiles

The Member Profiles option is where you enter a list of all possible attributes that you may want to keep for members. These are typically things like hobbies, talents, or interests, but can be used for any purpose:



With member profiles, you can search for members with a specific interest when a need arises in that area. This may include everything from locating seamstresses willing to sew costumes to identifying people interested in bicycling that could assist in planting a special-interest cell group.

Check for Duplicate Members

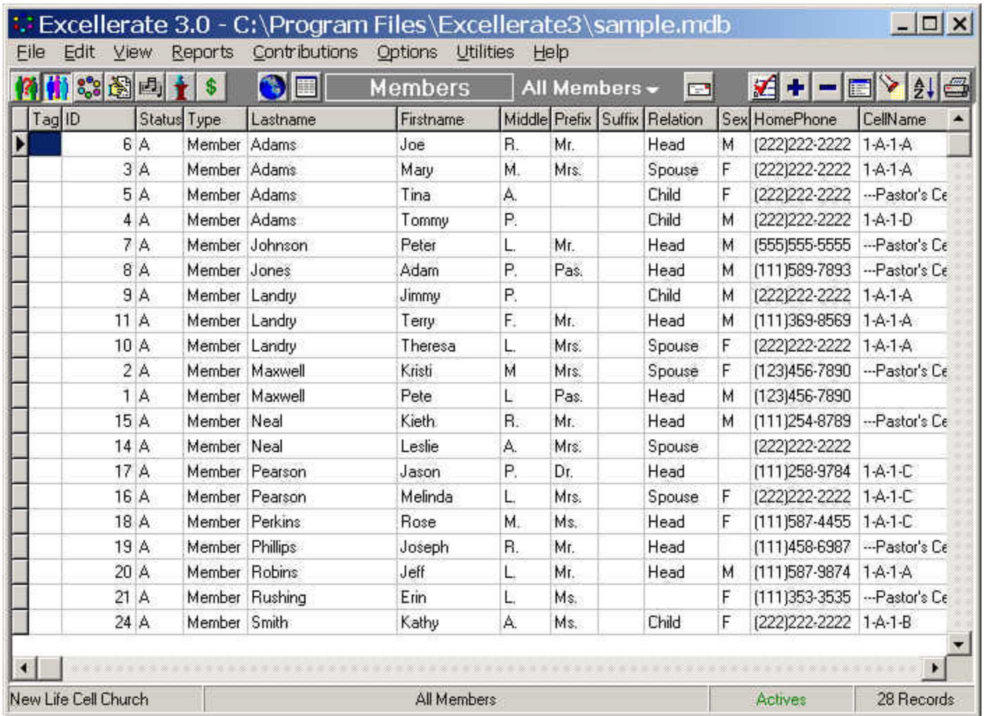
When adding new people to Excellerate, the program can automatically check to see if the person has already been entered. To enable this feature make sure Check for Duplicate Members is checked in the Options menu. As you type in a new person’s first and last name, Excellerate will search to see if anyone with that name has already been entered. You will then see a list of matches to determine if the new member has already been entered. To disable the feature, un-check this option.

Chapter 3: Getting Around

Now that you have installed and configured Excellerate for your church, we will take a look at getting around within the program, and introduce some of the screens and toolbars.

Main Screen

This is the main screen that you will see when starting Excellerate:



Tag	ID	Status	Type	Lastname	Firstname	Middle	Prefix	Suffix	Relation	Sex	HomePhone	CellName
	6	A	Member	Adams	Joe	R.	Mr.		Head	M	(222)222-2222	1-A-1-A
	3	A	Member	Adams	Mary	M.	Mrs.		Spouse	F	(222)222-2222	1-A-1-A
	5	A	Member	Adams	Tina	A.			Child	F	(222)222-2222	---Pastor's Ce
	4	A	Member	Adams	Tommy	P.			Child	M	(222)222-2222	1-A-1-D
	7	A	Member	Johnson	Peter	L.	Mr.		Head	M	(555)555-5555	---Pastor's Ce
	8	A	Member	Jones	Adam	P.	Pas.		Head	M	(111)589-7893	---Pastor's Ce
	9	A	Member	Landry	Jimmy	P.			Child	M	(222)222-2222	1-A-1-A
	11	A	Member	Landry	Terry	F.	Mr.		Head	M	(111)369-8569	1-A-1-A
	10	A	Member	Landry	Theresa	L.	Mrs.		Spouse	F	(222)222-2222	1-A-1-A
	2	A	Member	Maxwell	Kristi	M	Mrs.		Spouse	F	(123)456-7890	---Pastor's Ce
	1	A	Member	Maxwell	Pete	L	Pas.		Head	M	(123)456-7890	
	15	A	Member	Neal	Kieth	R.	Mr.		Head	M	(111)254-8789	---Pastor's Ce
	14	A	Member	Neal	Leslie	A.	Mrs.		Spouse		(222)222-2222	
	17	A	Member	Pearson	Jason	P.	Dr.		Head		(111)258-9784	1-A-1-C
	16	A	Member	Pearson	Melinda	L.	Mrs.		Spouse	F	(222)222-2222	1-A-1-C
	18	A	Member	Perkins	Rose	M.	Ms.		Head	F	(111)587-4455	1-A-1-C
	19	A	Member	Phillips	Joseph	R.	Mr.		Head		(111)458-6987	---Pastor's Ce
	20	A	Member	Robins	Jeff	L.	Mr.		Head	M	(111)587-9874	1-A-1-A
	21	A	Member	Rushing	Erin	L.	Ms.			F	(111)353-3535	---Pastor's Ce
	24	A	Member	Smith	Kathy	A.	Ms.		Child	F	(222)222-2222	1-A-1-B

The Member module will be the first module you see when you start the program. Remember, however, that you may change this initial module to Cells, Classes, or any other module by setting the ‘Open to module’ field in the Preferences screen.

Tool Bar

The Tool Bar allows you to navigate within the program quickly. The first set of buttons on the left side of the tool bar will take you to the different modules of the program:

Pre-Member Module
Member Module
Cell Module
Class Module
Organizations Module
Pastors Module
Contributions Module
School of Leaders view of active students or classes (if installed)
Internet Integration
Select a different view or selection of people, cells, etc…

These buttons can also be selected with the following function keys:

F4-Pre-Members, **F5**-Members, **F6**-Cells Groups, **F7**-Classes, **F8**-Organizations, **F9**-Pastors, **F10**-Contributions, **F12**-Select different views

The buttons on the right side of the toolbar are for working in the currently selected module.

The buttons are for Adding, Deleting, and Editing records.

The button is used for finding records within the current module.

The button is used for sorting the current view in different ways.

The button is for printing lists and reports

Other buttons will appear on the toolbar that are specific to the selected module. Hints are available for these buttons as you hold the mouse pointer over them.

Browse Screens

When you select a module to work in, Members, Cells, etc… you will see the browse screen for that module. The browse screen lists the records in that module for the current view you have selected. The browse screen can be re-arranged to show different columns. These columns can be moved around, and re-sized to meet your needs. The column arrangement will be saved for the next time you use the program. To move a column, drag the column header with the mouse. To re-size a column, drag the divider between column headers. If you shrink a column all the way, it will be removed from the view. To return you column arrangement back to the default, right-click a column header and choose restore default columns. (See Browse Columns in the appendix for more information)

Views

A view is basically a subset of the records for a particular module. Views allow you to look at the records your interested in. This can make working with the database much easier because you are only looking at the information relevant to your task.

Views can be quickly selected from the drop down list in the middle of the toolbar:

Views are not only for viewing information, but for reporting as well. This can be very powerful when combined with the reporting and mail-merging capabilities of Excellerate. For example, to print mailing labels for your cell leaders, you would simply choose the view for Cell Leaders, then choose the report for Member Lists / Labels from the Reports menu option. You could also use that same view of Cell Leaders and print a Member Development report to check on their development progress

Users can easily create their own views, and save them for future use. Views can even be imported from our web site and exchanged with other users. Use the

Select different view button (F12) to customize the views. (See the chapter on Views for more information)

Tagging specific records

Views are also used to tag random people for printing or exporting. In the main member browse simply double-click the Tag field to select the members. Then, select the view called “Tagged Records” to pull up the list of just those people. Now you can run reports, mail merges, or exports against that list. When finished, use the view “Tagged Records – CLEAR ALL” to release the tags.

Quick Searches

In any module, you can quickly search for a record just by typing a few letters of the name. To search for the first Smith, just type ‘Smith’, and the Search for… dialog box will appear. This will also work for Cells, Classes, etc…

Status Bar

The status bar is located at the bottom of your screen and shows your current view for the records in a given module. This could be “All Members”, or “Cells in District-1” for example. The right side of the status bar shows the number of records in the current view. The left side of the status bar is used for displaying status messages during program operation.

Getting Around in Edit Screens

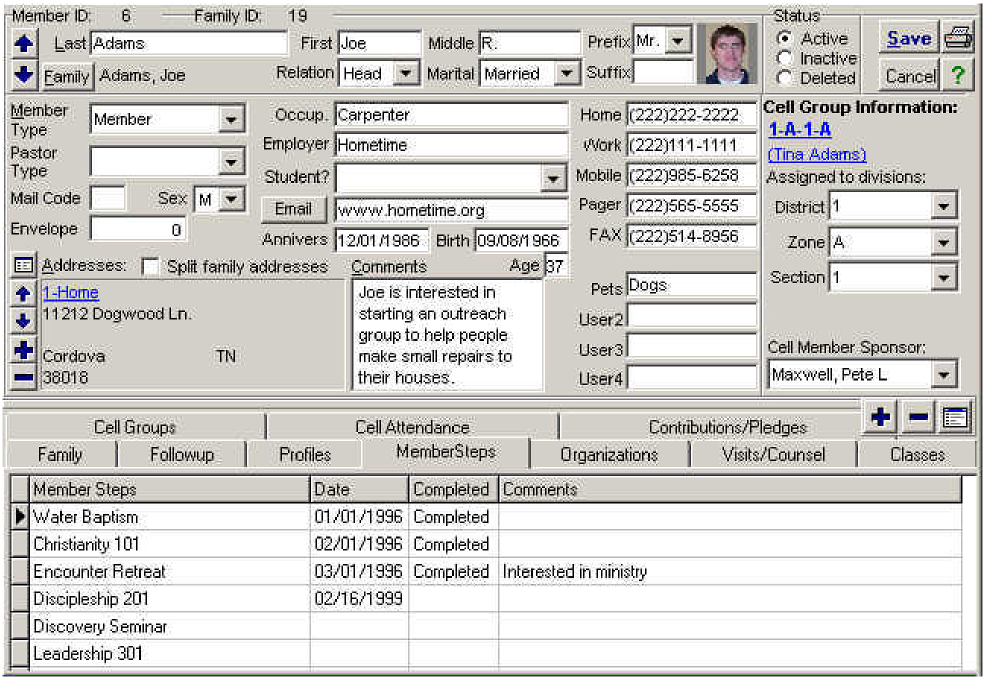

While editing a record from any module, you can jump to the previous or next record in the view without having to exit the record, by using these buttons:

While in an edit screen for any module, you can hit the following hot keys for easier navigation:

Hot Key	Function
Alt-U	Go up to the previous record in the view
Alt-D	Go down to the next record in the view
Alt-I	Go to the associated info tabs
F4	Jump to the Pre-Member module
F5	Jump to the Member module
F6	Jump to the Cell module
F7	Jump to the Class module
F8	Jump to the Organization module
F9	Jump to the Pastor module
F10	Jump to the Contribution module
F12	Change the current view
Ctrl-F	Find another record in the module
Ctrl-M	New email message in member module
Ctrl-R	Refresh the current view
Double-click blue underlined text	Jump to that edit screen

Associated Info Tabs

When you are editing a record, the top half of the screen will contain the pertinent information for that record, and the bottom half of the screen will contain a series of associated information tabs. These tabs will contain more information that is associated with the record.



For example the member screen will have the following associated info tabs: Other family members, Follow-up Information, Member profiles, Member's cell group, etc… The information in these tabs will contain links to the other parts of the program. For example, If you are viewing a particular member, you will see their family members listed in the family members tab. If you double-click a family member, you are automatically taken to that member's edit screen. You can also see that this member belongs to a cell group. You may double-click that cell group link, which will take you directly to that cell's screen of information along with all of its associated views. These work much like a web page with links to related information.

Remember! Any information that is underlined blue, can be double-clicked to jump to that edit screen.

Chapter 4: Pre-Members, Members and Pastors

The Member, Pre-Member, and Pastor modules all use the same information screens with a few differences.

Pre-Members are the people you are interested in following-up with, or mailing out marketing information to. These may be first-time church visitors, or an area of your city that you may be targeting. Pre-Members contain all of the same information fields as a member, because at some point you are hoping to move a pre-member to the member module. The main difference between pre-members and members is that pre-members can not join cells, classes, organizations, or use other associated information tabs. They can have family members and follow-up information. Pre-Members are actually stored in a separate table to avoid slowing down access to member information. At any time you can transfer a pre-member to the member module. Use the  button, or the F4 key to select the Pre-Member Module

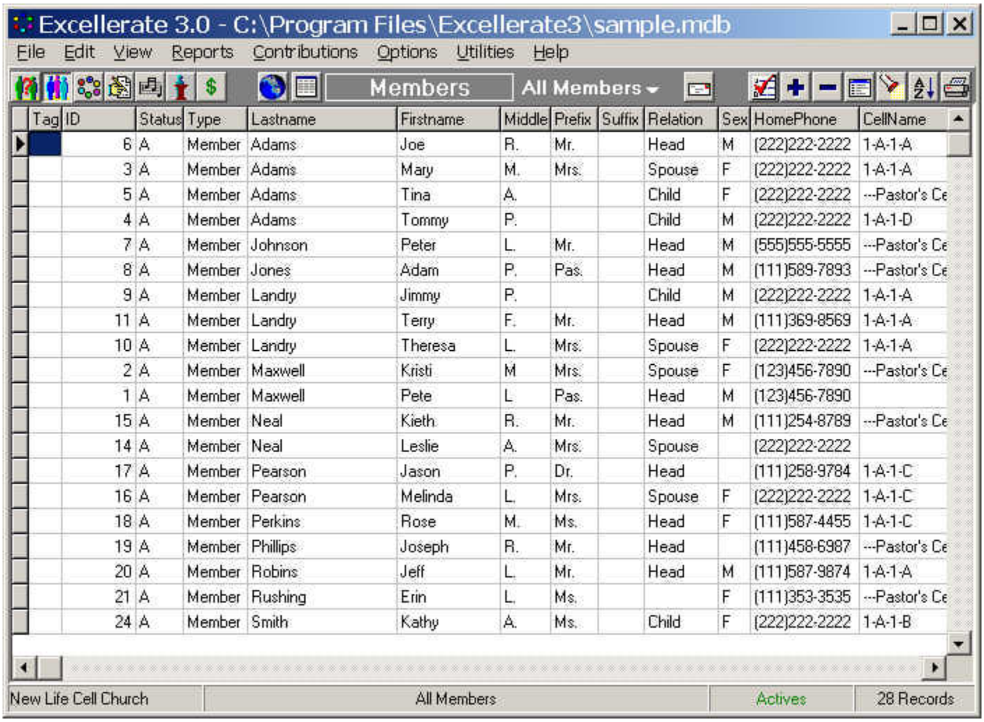
Pastors, on the other hand are exactly like members except the Pastor Field in the Member record is coded with the type of pastor. Pastors are members, and are stored in the member table along with other members. The only difference when you select the pastor module, is that your view is automatically setup to show pastors only. Use the  button, or the F9 key to select the Pastor Module.

Members are of course, the members of your church. They are also any individual, or business that you wish to track contributions for. Members would also include anyone you wish to track through cell groups, member steps, classes and organizations. Your cell groups may consist of a few members from other churches. These people would still be entered into the member module, and designated as 'OtherChurch' in their member type field. Use the  button, or the F5 key to select the Member Module.

We will describe the Member Module in detail here. Remember it contains the same screens used for the Pre-Member and Pastor Modules.

Pre-Members, Members and Pastors

When selecting the Member Module, you will see the Member browse screen:

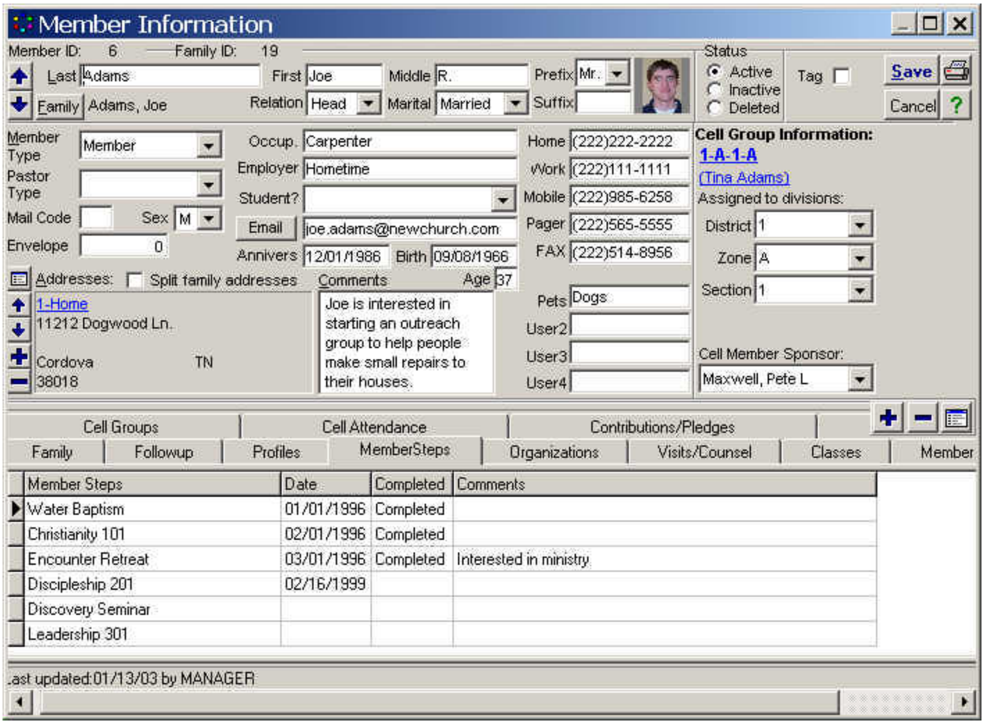


Tag	ID	Status	Type	Lastname	Firstname	Middle	Prefix	Suffix	Relation	Sex	HomePhone	CellName
	6	A	Member	Adams	Joe	R.	Mr.		Head	M	(222)222-2222	1-A-1-A
	3	A	Member	Adams	Mary	M.	Mrs.		Spouse	F	(222)222-2222	1-A-1-A
	5	A	Member	Adams	Tina	A.			Child	F	(222)222-2222	---Pastor's Ce
	4	A	Member	Adams	Tommy	P.			Child	M	(222)222-2222	1-A-1-D
	7	A	Member	Johnson	Peter	L.	Mr.		Head	M	(555)555-5555	---Pastor's Ce
	8	A	Member	Jones	Adam	P.	Pas.		Head	M	(111)589-7893	---Pastor's Ce
	9	A	Member	Landry	Jimmy	P.			Child	M	(222)222-2222	1-A-1-A
	11	A	Member	Landry	Terry	F.	Mr.		Head	M	(111)369-8569	1-A-1-A
	10	A	Member	Landry	Theresa	L.	Mrs.		Spouse	F	(222)222-2222	1-A-1-A
	2	A	Member	Maxwell	Kristi	M	Mrs.		Spouse	F	(123)456-7890	---Pastor's Ce
	1	A	Member	Maxwell	Pete	L	Pas.		Head	M	(123)456-7890	
	15	A	Member	Neal	Kieth	R.	Mr.		Head	M	(111)254-8789	---Pastor's Ce
	14	A	Member	Neal	Leslie	A.	Mrs.		Spouse		(222)222-2222	
	17	A	Member	Pearson	Jason	P.	Dr.		Head		(111)258-9784	1-A-1-C
	16	A	Member	Pearson	Melinda	L.	Mrs.		Spouse	F	(222)222-2222	1-A-1-C
	18	A	Member	Perkins	Rose	M.	Ms.		Head	F	(111)587-4455	1-A-1-C
	19	A	Member	Phillips	Joseph	R.	Mr.		Head		(111)458-6987	---Pastor's Ce
	20	A	Member	Robins	Jeff	L.	Mr.		Head	M	(111)587-9874	1-A-1-A
	21	A	Member	Rushing	Erin	L.	Ms.			F	(111)353-3535	---Pastor's Ce
	24	A	Member	Smith	Kathy	A.	Ms.		Child	F	(222)222-2222	1-A-1-B

The member browse screen shows the members in your church. From this screen you add, edit and delete members, and can see different subsets of your members by selecting other views.

Next, we will take a look at the Member Screen, and the information it contains:

Member Screen



The Member screen as well as the other edit screens in Excellerate is divided in half. The top half contains all of the general information about the member, and the bottom half contains the associated information tabs.

Most of the fields in the member screen are self-explanatory, but we will highlight the fields with special meaning, or that are not apparent.

Member ID A member's ID number is automatically assigned when the member is entered into the system. This number is unique to this member, and is used to link all other related information to the member.

Last The Last name field can be used for a member's last name, or a business name.

Prefix The Prefix has a user-definable picklist that can be modified in program options. For business choose Bus.

Relation Specify Head if this member is the head of the household, otherwise choose Spouse, Child or leave blank. This field is also used to determine how to address mailing labels when using the 'Mr. & Mrs.' option.

Family The family button allows you to assign the member to a family. For new members of a new family, do not choose a family, and the system will create the family for you. Then subsequent members can be assigned to the new family. If a member needs to be removed from a family, this button can do that as well.

Status The status field specifies the member's status. This can be Active, Inactive, or Deleted. Active members are current, active members. Inactive members are those that may have moved away, but have given contributions in the past year. These members must remain in the system until the end of the year. Then they can be deleted. Deleted members are marked for deletion. These members can be permanently removed from the system at the end of the year. Inactive and Deleted members can not be modified, or assigned to cells, classes, etc…

Tag The tag field allows you to select or tag various random members for printing, or exporting, etc. After tagging the records, use the view for viewing the list of tagged members.

Picture The picture window is a thumbnail view of the picture assigned to this member. See member pictures in the appendix for more information on assigning pictures.

Member Type The member type is used to classify the member. These types can be setup by the user.

Pastor Type Pastor Type designates this member as a pastor. The pastor types can be setup using the picklists menu option.

Mail Code Mail Code allows you to assign a code to the member. These codes can be excluded from mail-outs. You can use any code that is meaningful to you. Typically, N would be used to designate that this member should not receive any mail-outs.

Envelope The Envelope Number field allows you to assign a contributions envelope number to the member so that their contributions can be entered by simply looking up this number as opposed to searching for their name. Envelope is one of the quick search fields available in member searches.

Comments The Comments field can be used for recording any comments, or other information for which there is no specific field. You can enter as much information in this field as you wish. The Comments field automatically expands when you place the cursor in this field to allow you to see more information. When you go to another field, it shrinks back to its original size. Comments can also be included on reports.

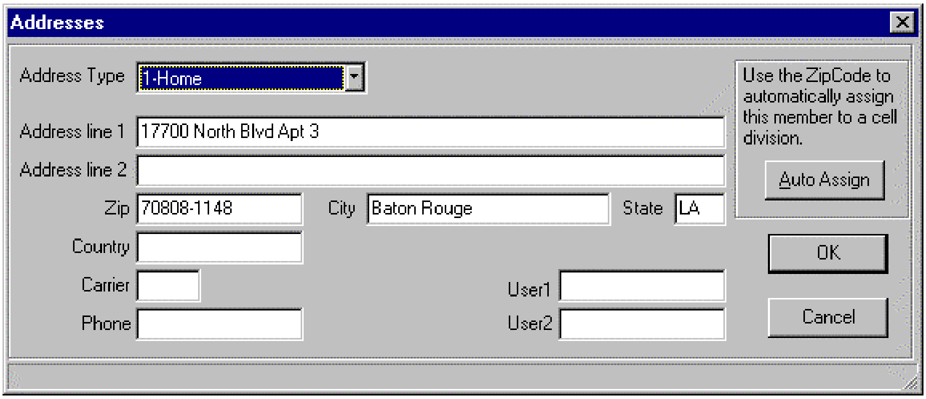
User1-4 The user fields can be renamed in the preferences option to any other item that your church wants to track for it's members. These fields can be set up to accept any value, or values from a picklist. You can also add your own new fields to Excellerate and place them in the member screen. See the section on Flex Fields later in the manual.

The **Cell Group Information section** will show what cell group, if any, the user belongs to. Since this field is underlined in blue, you can also double-click it to jump directly to their cell group. The fields below specify what divisions the member is assigned to. Members can be assigned to divisions, but not necessarily a cell. New members may be assigned to a District, and Zone, for example to be followed-up on by that zone pastor, but they may not yet be in a cell. When they do join a cell, these fields are updated to reflect the divisions of the new cell. These fields can be automatically assigned when entering the member's zip-code. See member addresses below.

The **Cell Member Sponsor field** is used when the member joins a cell. If one of the existing cell members were responsible for the new member joining their cell, then that person would be recorded here. This way you would know to keep these members together when multiplying the cell. You may find other uses for this field as well.

Member Addresses

To add a member's address, use the button on the left side of the screen next to the address window. The member address screen will appear.



Address Type allows you to specify whether this address is the home address, work address, etc… If you have already setup the zip-codes under the options menu, then as you type in zip-codes, the city and state will automatically be entered for you. Also by hitting the Auto Assign button, you can assign the member to a set of divisions. This may be a District for most cell churches.
The other buttons to the left of the address window on the member screen are for editing, deleting, and viewing the previous or next addresses.

Family addresses and Split addresses

When a member is added to a family, they automatically get assigned to the family address. The family address is the address that is shared by all members of the family. If you pull up one of the family members, and change the address, it is changed for all family members. If you need to change the address for one of the family members, then that member's address needs to be split out from the family address. To do this you would choose 'split family address' from the member screen, and this will make that member's address separate from the rest of the family's. Then changes can be made to that address without affecting the other family members. If that family member decides to move back home, and you want to 'un-split' their address, you will need to do the following: Remove the member from the family by using the family button, and then selecting Remove member from family. Save the member, then re-assign them to their original family.

Members - Associated Information Tabs

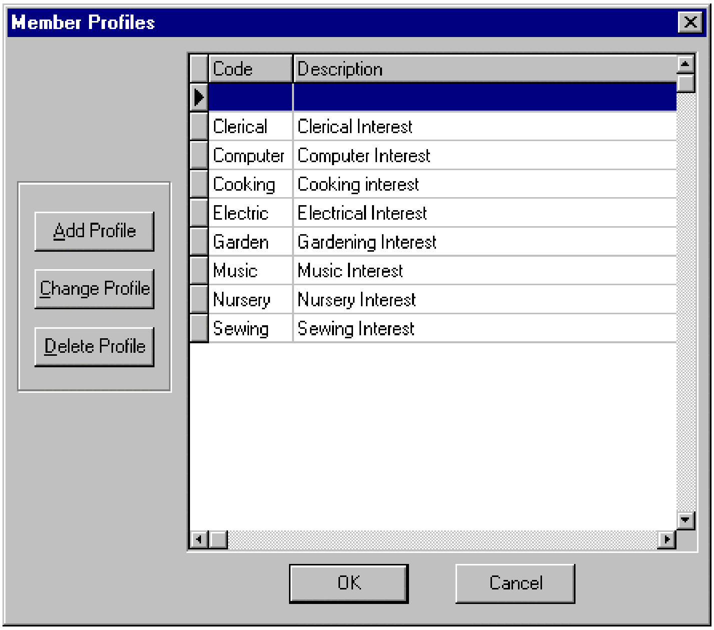
Associated Information Tabs appear in the bottom portion of each member's screen, and contain various information associated with the member. The following nine associated information tabs are available from within the member edit screen:

Family	Lists any family members and their vital information
Follow-up	Includes date member joined, how they heard about the church, and other follow-up information
Profiles	Hobbies, interests or any other member attribute
Member Steps	Steps in the member's development cycle, such as water baptism, becoming a participator, or becoming a leader
Organizations	Organizations within the church in which the member participates, such as worship team or children's church
Visits/Counsels	Records any visits or counseling sessions with pastors, Including time, location, and any notes from the session
Classes	List of classes that the member has attended or is scheduled to attend
Member History	History of any changes in member information, such as address changes or name changes
Cell Groups	Notes name of cell group a member is in, along with cell type and date the member joined the cell
Cell Attendance	Lists each cell meeting that the member has attended.
Contributions/ Pledges	Lists member contributions and their pledges.
Church Attendance	Lists each church service that the member has attended.

The **Family Member** tab allows you to see all of the members of a family. Double clicking a family member will bring up their screen. Family members can quickly be added by hitting the “Add” button for this tab.

The **Follow Up** tab is used for following-up on new visitors or members. These people can be assigned a sponsor who would be responsible for following-up with them. You can track how they heard about the church, dates of first visit, or joined, and up to four contact attempts and their responses. All of the picklist values for these items are user definable in the Options menu.

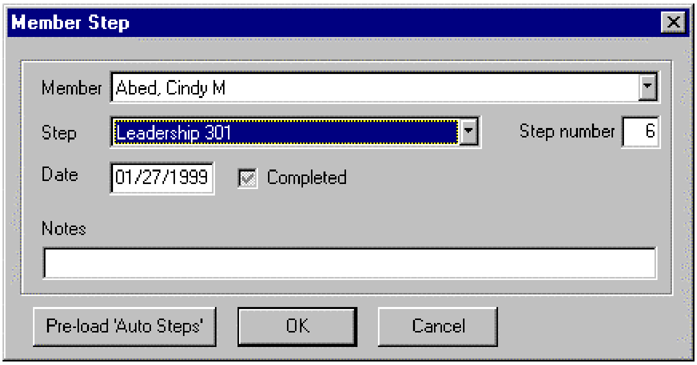
The **Profiles** tab is used to track various attributes about a person such as interests or hobbies. You can enter any, and as many profile codes as you wish, as long as they have been set up in the member profiles list under the options menu.



With member profiles, you can search for members with a specific interest when a need arises in that area. This may include everything from locating volunteers willing to sew costumes to identifying people interested in bicycling that could assist in planting a special-interest cell group.

The **Member Steps** tab allows you to track a member’s progress through your churches member development process.

To add a new step to this member, use the button:



From this screen, you can select a specific step to add to the member, or you can choose Pre-load 'Auto Steps'. This option will automatically load all of the member steps that have been designated as 'Auto-Steps'. This way, when you pull up a member record, you can easily see which steps have been completed, and which steps have not:

Member Steps	Date	Completed	Comments
Water Baptism	01/06/1998	Completed	Water baptized at the cell group
Christianity 101	03/11/1998	Completed	
Encounter Retreat	05/22/1998	Completed	Cindy feels a calling into the ministry
Discipleship 201	08/11/1998		
Discovery Seminar	11/28/1998		
Leadership 301	01/14/1999		

To indicate that a step has been completed, simply double click the completed field for the desired step.

The Member Steps tab is also used for tracking the details for Post-Encounter / School of Leaders classes in the G12 model. See the chapter on classes for more information.

The **Organizations** tab view allows you to track any organizations a member is involved in. These may include choir, prayer teams, kid's services, etc… Remember, you can double-click the organization to quickly jump to that screen.

The **Visits/Counsels** tab is used for recording visits, meetings, counseling, etc… between members and the staff, as well as between members and other members.

Often in a cell church, cell leaders and members do much of the ministry as well as the church staff. You have the option of viewing visits with the current member, or visits the current member has had with others.

The **Classes** tab allows you to track which classes this member has taken, or is scheduled to take. This list will show each session of a particular class, so this tab gives more detail than if you had a member step indicating that the class was completed. Again, as in member steps, when adding a class, you can choose to add all sessions of a class to the member to make it easier to see what has been completed, and what is left. Also, the attended field can be double-clicked to quickly indicate that the member attended that session.

The **Member History** tab records certain changes that have been made to a member's record. This will show the members cell group membership history, and any changes to the 'History Fields'. You can setup which fields you wish to record change history on by entering them into the History Fields List under the Utilities menu option. The member history list also show which user made the change, and when.

The **Cell Groups** tab shows which cell group this member belongs to, and which groups this member may lead. You will frequently want to jump back and forth between a member and their cell group, and can easily do so by double-clicking the cell group, or the member's name. You can also move a member to a different cell group from this tab, by editing the cell member record, and hitting the Move to new cell button. To remove the member from a cell use the same process but leave the To Cell blank.

The **Cell Attendance** tab shows which cell meetings this member has attended. Each cell meeting is listed indicating whether the member attended or not.

The **Contributions/Pledges** tab shows the member's contribution summary, and a choice of seeing their individual contributions, their family contributions, or their pledges. These contributions can be edited from this screen if the program options have been set to allow it.

The **Church Attendance** tab shows the date that this member has attended a church service. Time in and out can also be recorded which is useful for checking children in and out of children's church.

Adding Members

To add a new member to the system, simply press the  add button or hit insert, while viewing the member browse. When adding new members, there are several ‘Required Fields’ that must be entered before you can save the entry. You can specify which fields are required fields in the Utility menu. For new members of a new family you do not need to select a family. The program will automatically create a new family entry for you.

Adding Family Members

While adding a new member, you can quickly add another family member by clicking the button for the family members tab. This will save your current member, and add a new record with the last name and address already filled in. Your cursor will be placed in the first name field ready for you to continue.

The other way to add a new family member, is to add them as described in Adding Members above, but this time, select the family they belong to by using the family button.

All family members by default share the same address. Any changes to the address will be applied to all family members. To specify a different address for one of the family members, you would use the split address feature. See Member Addresses above.

If you’ve made a mistake, and assigned a member to the wrong family, simply edit that member, hit the family button, and select a new family. You can also remove a member from a family by selecting remove member from family under the family button.

Editing Member Information

To edit a member record, simply double-click it, press enter, or use the edit button. Once you’ve made your changes, save them with the Save save button, or cancel your changes with the cancel button.

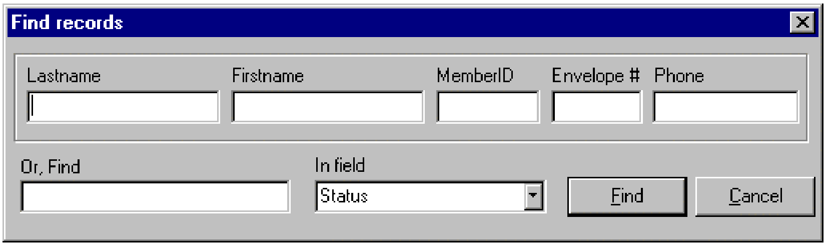
Deleting Members

To delete a member, use the key from the member browse, or edit the member, and choose the Deleted status. This will only mark the member as Deleted, and not actually remove it from the system. This is so that history can be kept on these members, and so that you can recover the member if you deleted them by mistake. To physically and permanently remove deleted members, you use the Remove Deleted Members option in the Utility menu. This option can not be recovered from, unless you have a backup, so use caution. The remove option requires database security to perform.

The other choice in the member status field is Inactive. This is similar to delete, but you can not remove inactive members. This option would be used to hide members that are no longer active in the church, but may have given contributions this year. The system will need to keep these members until all contribution reports are printed. At that time, those members can be deleted.

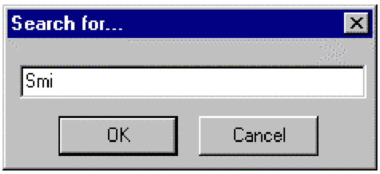
Searching for Members

There are two ways to search for members. First, is to use the  find button:



This method allows you to quickly search by several fields. This type of search will return all members matching the search criteria in a search results view. Hit escape to return to the previous view.

The other way to search is to simply start typing a few letters of the member's name:



The Search for… window appears. This method will take you to the first occurrence of the last name that matches the search criteria in the current view. You can also search for the last name, comma, first name. This will not find a member that is not in the current view.

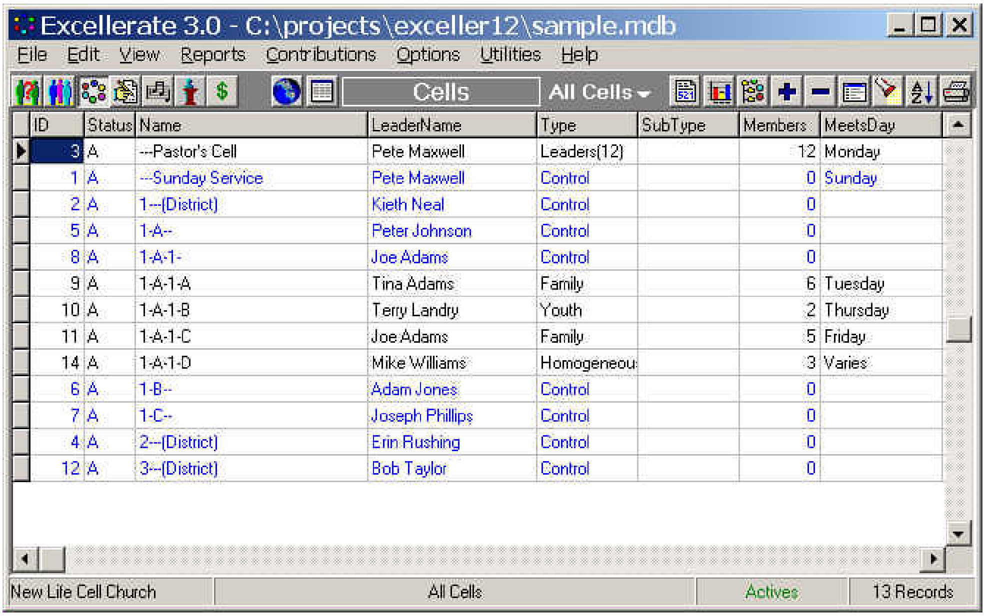
Pre-Members

Once again, Pre-Members are the people you are interested in following-up with, or mailing out marketing information to. These may be first-time church visitors, or an area of your city that you may be targeting. Pre-Members contain all of the same information fields as a member, because at some point you are hoping to move a pre-member to the member module. The main difference between pre-members and members is that pre-members can not join cells, classes, organizations, or other associated information tabs. They can have family members and follow-up information. Pre-Members are actually stored in a separate table to avoid slowing down accesses to member information.

At any time you can transfer pre-members to the member module. When you select the Pre-Member module, the  Move Pre-Members button appears in the toolbar. This button will move pre-members from the pre-member module to the member module. This process will actually move the pre-member's entire family, assigning a new family number and member numbers. The addresses and follow-up information is transferred along with the pre-member.

Chapter 5: Cells

The Cell module is probably the most important module in Excellerate. This module manages all the members, meetings, activities, growth etc… of your churches cell groups. To access the cell module, use the cell button or hit the F6 key. After selecting the Cell Module you will see the Cell browse screen:

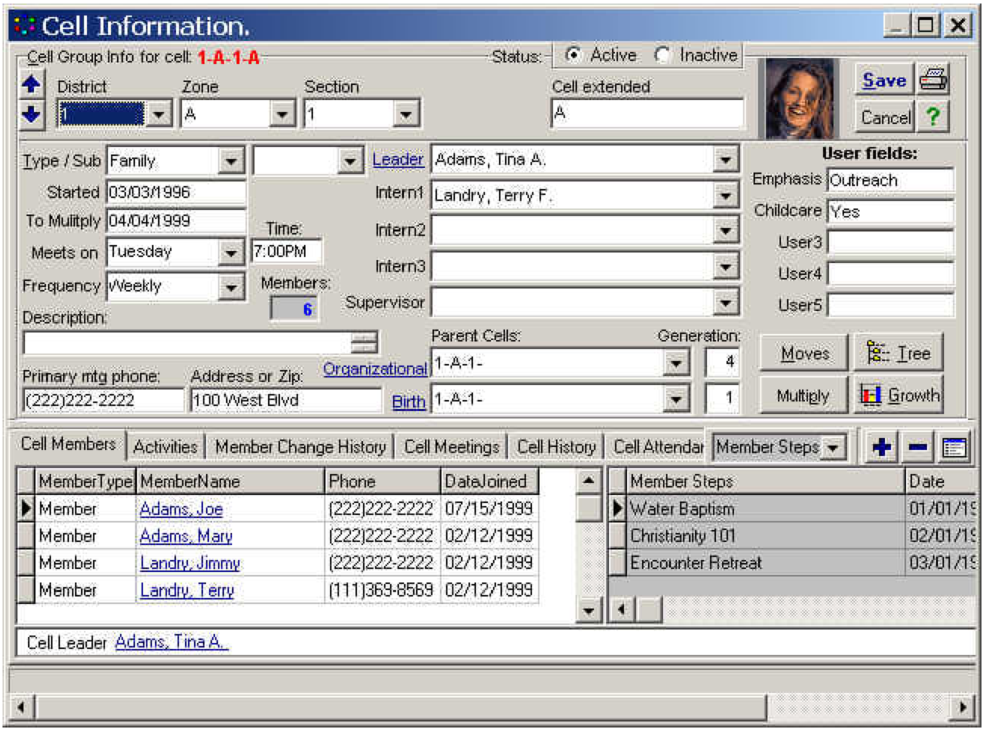


ID	Status	Name	LeaderName	Type	SubType	Members	MeetsDay
3	A	---Pastor's Cell	Pete Maxwell	Leaders(12)		12	Monday
1	A	---Sunday Service	Pete Maxwell	Control		0	Sunday
2	A	1---(District)	Kieth Neal	Control		0	
5	A	1-A--	Peter Johnson	Control		0	
8	A	1-A-1-	Joe Adams	Control		0	
9	A	1-A-1-A	Tina Adams	Family		6	Tuesday
10	A	1-A-1-B	Terry Landry	Youth		2	Thursday
11	A	1-A-1-C	Joe Adams	Family		5	Friday
14	A	1-A-1-D	Mike Williams	Homogeneou		3	Varies
6	A	1-B--	Adam Jones	Control		0	
7	A	1-C--	Joseph Phillips	Control		0	
4	A	2---(District)	Erin Rushing	Control		0	
12	A	3---(District)	Bob Taylor	Control		0	

The cell browse screen shows the cell groups of your church. From this screen you add, edit and delete cells, and can see different subsets of your cells by selecting other views.

Next, we will take a look at the Cell Screen, and the information it contains

Cell Screen



The Cell Information Screen shows all information relating to this cell group. The top half of the screen shows details on the cell, and the bottom half shows the associated information tabs.

Division Fields

The top section of the cell screen lists the division codes that this cell belongs in.

Remember a “division” is the generic term used in Excellerate to describe the levels within your cell structure, such as District, Zone, Section, etc…. Some churches may include Congregation, or City as one of their divisions.

In this example we are using District, Zone, and Section. We will explain more about using these fields in the section on Adding Cells. The values for the division fields can be chosen by using the picklists. These picklists are defined in the picklists menu option.

Cell extended The Cell extended field is used to further identify the cell with either a descriptive name, or the leaders name, or to continue the divisions past 4 levels. For example, in a large cell church, if you had a cell called 1-A-1-B-9-D, the division fields would hold the 1-A-1-B part, and the Cell extended field may hold the '9-D'. This field is either the last part of the cell name if your cell options are set to use divisions in the cell name. Or, this field will be the cell name if not.

Status This field indicates whether the cell is Active or Inactive. You may want to inactivate a cell for a period of time, and then re-activate it later. When the cell is inactive, you will not be able to record meeting totals for it, and the cell will not show up on your reports. This is useful for student cells that only meet during the school year. Inactivating a cell is better than deleting it, because you don't loose any history. The cell remains in the database, but is hidden from most cell maintenance functions.

Type/Sub The Cell type field lets you classify your cells into categories. This could be categories such as Family, Work, Groups of 12, Youth, etc…. The Sub field allows you to further categorize your cell by using a sub-type. These choices are defined in the picklists menu option. There is one type of cell that is handled differently than other cells. If a cell has the type 'Control', then this cell is excluded from cell meeting totals entry and reporting.

A 'Control' cell is a cell that is used to identify a leadership position in the cell hierarchy such as the District 1 Zone A Leader. We create a cell with the name 1-A and assign the District 1 Zone A leader as the leader of this cell. In a traditional cell structure such as the 5 X 5 structure, the 1-A Leader may be a full time staff member, and not a cell leader. In this case the cell 1-A would not have any members, and would not have any meetings, but it would have cells under it in the cell hierarchy. Therefore we set the cell type to 'Control' so that it is not included in cell meeting total functions.

The 'Control' cell type and overall cell hierarchy is discussed further in the section on Adding Cells.

Started The date that the cell was started. When multiplying cells, Excellerate will enter this value for you.

To Multiply The target date for this cell to multiply. You can then report on this field to list all cells targeted to multiply next month, etc…

Meets on The day and time when the cell meets.

Frequency How often the cell meets. Most cells will meet weekly, but you may have some cells that meet daily, monthly, or periodically.

Description This is a general description of the group. This can be used in printing group menus and providing information on your web site about the groups.

Primary meeting Phone & Address These fields specify where the cell meeting is primarily held. The last four digits of the Phone field is used as the default password for logging in to the online reporting form.

Members This field shows how many cell members are in this cell.

Cell Leader The cell leader. When a new leader is assigned to a cell, history of the leader change is recorded, and the new cell leader's phone number can be loaded into the primary meeting phone

Intern 1-3 These fields may be renamed to titles that your church uses. You may have several interns. Although every cell will not have the need for three interns, it may prove helpful as cell leaders attempt to give responsibility to various cell members, according to their willingness and gifting. Your cell leaders may wish to have a worship leader intern, a cell leader intern, and an outreach intern simultaneously.

Supervisor The cell supervisor is a field that can be used for another individual besides the cell's district and zone pastors that is responsible for the cell. This could be your children's pastor, if you have children's cells. Those cells may be overseen by the district and zone pastors in one way, but also by the children's pastor in another.

Parent Cells Parent cells are the key to how the cell hierarchy is represented in Excellerate. By assigning a parent cell to a new cell, you have connected the new cell to the cell hierarchy. See the section below on representing your cell structure in Excellerate for more information on parent fields.

Generation The generation fields show what generation the cell is in relation to the associated parent field whether it be Organizational or Birth parent. The generation is automatically calculated any time a parent field is changed.

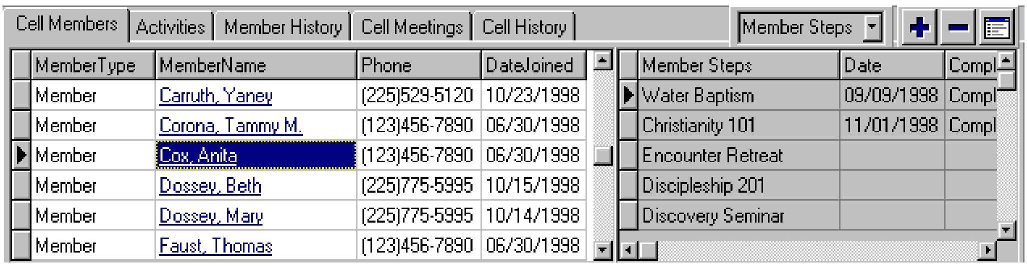
User fields Use these fields to track other cell information you church may be interested in. These field names can be set up in program preferences.

Cells - Associated Information Tabs

Associated Information Tabs appear in the bottom portion of each cells's screen, and contain various information associated with the cell group. The following five associated information tabs are available from within the cell edit screen:

Cell Members	Lists all cell members and their member development information.
Activities	List any activities that the cell group is involved in.
Member History	Lists past members that have moved out of the cell.
Cell Meetings	Lists the cell meeting totals that have been entered for the cell.
Cell History	Lists any changes that have been made to the cell.
Cell Attendance	Lists the cell members attendance history

The **Cell Members** tab allows you to see the cell members that belong to this cell along with their member development information. As you choose different members on the left side of the information tab, their member steps, or classes appear on the right. You can choose Member Steps or Classes to view on the right.

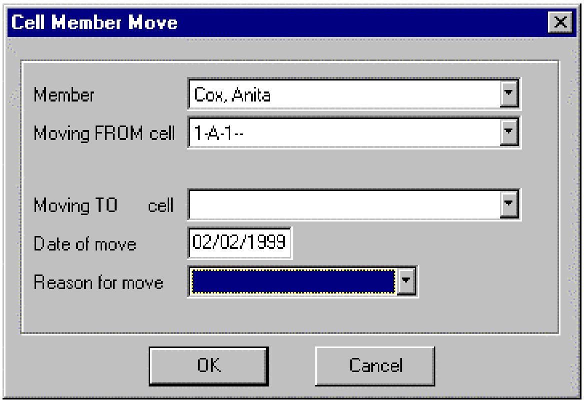


You can jump to a cell member's screen by double-clicking their name.

To add new members to this cell, simply hit the add button while viewing the cell members tab. To delete a cell member, you could use the delete button, or you could move the cell member out of this group. By moving members you can give a reason for the move.

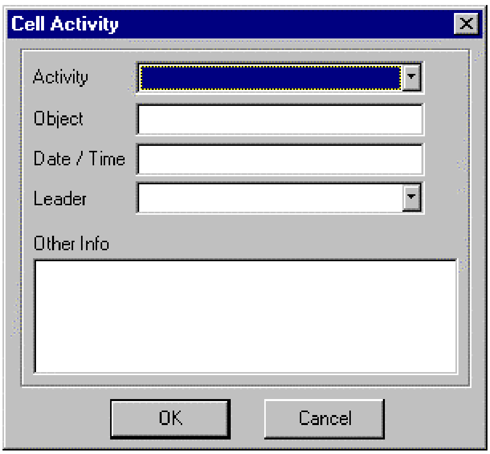
Cells

To move a cell member, highlight that member, and hit the Moves button in the cell edit screen.



From this screen simply choose the new cell to move the member to, and the reason for the move. If the cell member is not moving to a new cell, then leave the To cell blank.

The **Activities** tab allows you to assign different activities to a cell group. These may be things like community outreach, or prayer for a missionary.



When you set a date for these activities, you can automatically be reminded of them on the Cell Leader Report forms that get printed each week. This form will show any activities that are coming up in the current month.

The **Member History** tab simply lists former members that have moved out of this group, and why.

The **Cell Meetings** tab shows the cell meeting totals that were entered for this group. You can see from this information how the cell is growing. You can edit these entries by highlighting the entry and using the edit button for the tab. The edit screen for cell meeting totals is a shorter version of the Mass Cell Meeting Totals Entry screen accessible from the cell browse. You would use the Mass Cell Meeting Totals Entry screen on a weekly basis for entering all of your cell totals, but this tab allows you to easily see and maintain the meeting totals for a particular cell.

The **Cell History** tab shows change history to the fields that are designated as history fields. This list of history fields can be modified in the Utilities menu.

The **Cell Attendance** tab shows individual cell member's attendance history. Member's attendance can be modified here by double-clicking the Attended column. Again, on a weekly basis you would use the Mass Cell Meeting Totals Entry screen for recording attendance for all of your cells, but this tab shows the attendance for one particular cell.

Representing Your Cell Structure in Excellerate

Many different cell models exist around the world. Excellerate was designed so that it could represent any of them by using a flexible naming scheme and by allowing you to place cells "under" other cells to create a cell structure that resembles a typical organizational chart. Two common cell models will be described below to demonstrate the different characteristics unique to each. Your particular model may match one of these, or may use aspects from each. We recommend that you read through the entire section before starting to create your cells.

The 5 X 5 Model

In the following discussion we will use the names District, Zone, and Section to identify our divisions (Div1-Div3). Your church may use other names.

If you were to draw a chart of your churches cell structure, you would probably draw an organizational chart with cells listed under district, zone and section pastors. In Excellerate, to represent cells as being 'under' the district 1 pastor for example, you would create a 'Control' cell group for district 1 by setting the District field (Div1) to 1, and the other fields, Zone, Section to blank. Also set the Type field to 'Control'. Then assign the district 1 pastor to be the leader of that cell. Next you would create a 'Control' cell group for Zone 1-A by setting District to 1 and Zone to A, and assign the zone pastor to be the leader of that cell. Now to show that cell 1-A is under cell 1, set cell 1-A's **Organizational Parent Cell** to the district cell 1. You would also create a cell 1-B, and set it's Organizational Parent Cell to district cell 1. You would continue in this manner until you get to your actual cells, which would be placed under the section control cells. By setting the cell's parent field, you are placing it under another cell.

Remember, control cells are for district, zone, section and cells that do not have any members. To make a cell a control cell, you set the cell's Type field to 'Control'. Control cells do not meet, and do not have any members. These cells will not appear on weekly meeting total reports.

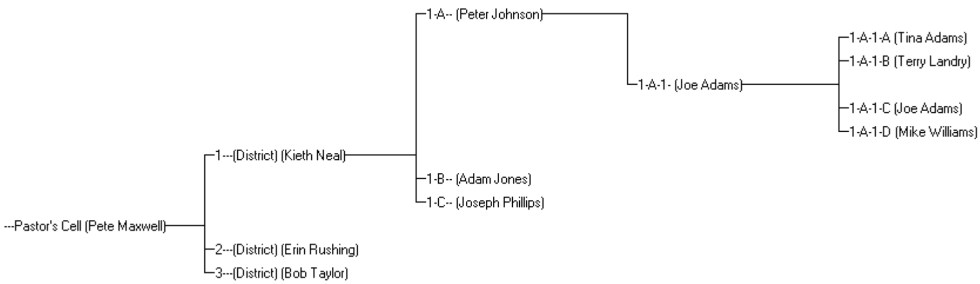
In the following example, we have created these control cells in district 1:

District cells:
- 1 (Keith Neal)
- 2 (Erin Rushing)
- 3 (Bob Taylor)

Zone cells:
- 1-A (Peter Johnson)
- 1-B (Adam Jones)
- 1-C (Joseph Phillips)

Section cells:
- 1-A-1 (Joe Adams)
- 1-A-2
- 1-A-3

Now we can assign real cells, 1-A-1-A, 1-A-1-B, 1-A-1-C and 1-A-1-D to section cell 1-A-1 (Joe Adams):



We use cells to represent the district, zone and section leaders for three reasons:

It makes more sense to put cells under the position ‘District 1’ than the person ‘District 1 Pastor’. The person may change, but the position will not.
By creating district, zone and section cells, you can assign activities to these cells, track history and other information that applies to the whole district, zone, etc…
In some cell models, the district, zone, section leaders may have real cell groups with group members who also lead cells, and so on.

The G12 Model

In the following discussion we will use the names Network, The12, The144, and The1728 to identify our divisions (Div1–Div4). Your church may use other names.

The G12 structure starts with a top level called Network where you may have the following networks: Men, Women, Youth, and Children. Under each network you would have up to 12 leaders called The12, and under each of those you would have up to 12 leaders called The144 and so on. In Excellerate, you would start by creating the Network Leader cells, Men for example, by setting the Network field (Div1) to Men, and the other fields, The12, The144, The1728 to blank. Then assign the Network leader to be the leader of that cell. Next add the cell members, his 12 into his cell. Next you would add the cells for those 12 under the networks such as Men-01 by setting Network field to Men and The12 field to 01, and assign the leader of the cell. Repeat this process on down as far as your structure goes. As your structure grows past the 1728 level, continue with the naming convention into the “Cell extended” field.

Now, to show that cell Men-01 is under the Men network cell, set cell Men-01’s **Organizational Parent Cell** to the network cell Men. You would continue in this manner until you enter all of your cells. By setting the cell’s parent field, you are placing it under another cell.

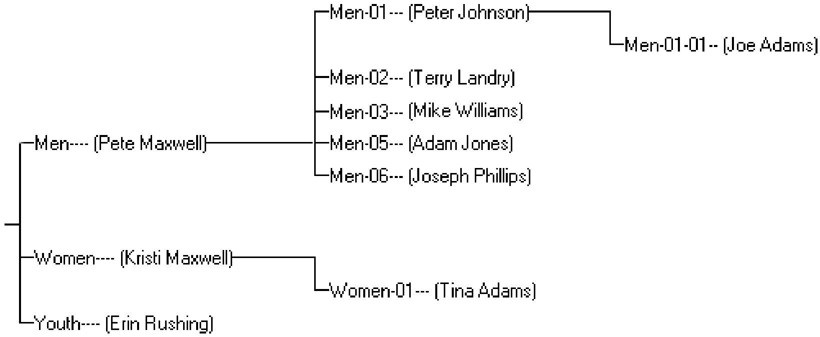
In the following example, we have created these cells:

Network cells:
- Men (Pete Maxwell)
- Women (Kristi Maxwell)
- Youth (Erin Rushing)

The12 cells:
- Men-01 (Peter Johnson)
- Men-02 (Terry Landry)
- Men-03 (Mike Williams)

Cells

The144 cells:
Men-01-01 (Joe Adams)



In the G12 model, all of the cells are real cells, not control cells. They all have members who are leaders of other cells.

Each cell can actually have two different kinds of cell parents:

Organizational Parent – This is the parent cell from an organizational point of view. It answers the question "Who is responsible for my cell in terms of an organizational or administrative hierarchy?"

Birth Parent – This is the parent cell from a 'birthed-from' point of view. It answers the question "What cell was my cell birthed from?" This will usually be the same as the organizational parent, but a new cell may have been birthed from district 1, but because the new leader really lives in district 2, that cell may be put under district 2. It is still good to know which cell the new cell was birthed from.

When setting up your cell structure you really only need to assign Organizational Parents. Birth parents will be calculated and entered for new cell multiplications.

Now that you understand how the cell structure is implemented, here is the easiest way to start entering and structuring your cell groups:

First, start by entering all of your cell groups without worrying about assigning the Organizational or Birth parents. Next, enter any Control groups for Districts, Zones, etc… if you are using that type of structure. Now, use the Cell Organization Tree to view all of your groups. They will all appear in a list on the left-hand side. Finally, drag each cell on top of the cell it should fall under. For example, if you have a cell called '1-A-1-B', it would fall under Control cell '1-A-1' so you would drag cell '1-A-1-B' on top of cell '1-A-1'. This will automatically assign the Organizational parent. Continue dragging your cells around until your structure looks like you want.

Adding Cells

To add a new cell to the system, simply press the add button or hit insert, while viewing the cell browse. When adding new cells, there may be several 'Required Fields' that must be entered before you can save the entry. You can specify which fields are required fields in the Utility menu.

Start by entering a cell for the head pastor, or whoever oversees all of your cell groups. This cell and leader will appear as the head of all the cells on you organizational chart. Then add your district cells, or whatever you call your first level cells, and set their organizational parent to be the head cell. Continue with your other cells in this manner until you have them all entered, and assigned parents.

Cells

When adding your cells, you start by entering their division fields. Your church may choose not to use all four of these division fields. This is defined by the names you've chosen for the division in the program options screen. If you left a division blank, that field would not appear in the cell screen. To enter cell 1-A-2-B, you would set District=1, Zone=A, Section=2, and Cell=B. If this were a District cell 1, you would only enter District=1. The Cell extended field would be blank, unless you wanted to make it clear that this was a district cell by putting the word (District) in the cell name field. The cell extended field identifies this cell within the given division hierarchy. This can be a letter, number, or up to an eight character name.

The actual name of the cell will be the combination of the division and cell extended fields, unless you chose not to use the divisions as the cell name in the preferences screen. Then the cell name will appear as just the value in the cell extended field. Here are some example cell names:

5-A-1-B
MyChurch-5-A-1-B
5-A-1-Teens
Chicago-East-1-B

If you choose not to use the divisions in naming a cell, then you may designate a simple name similar to the following:

Kevin's
Teen Life
Singles

Remember if the cell is a district, zone or section cell, and does not have any members, it's type field should be set to 'Control' so it will not ask for meeting totals, or show up on weekly reports.

Also assign the cell leader, by choosing a member from the picklist. Again, if this is a district 1 cell, the leader would be the district 1 pastor and so on.

Next, assign the cell's Organizational Parent field by picking the parent from the drop down picklist. This parent may be a district, zone or section cell, or in a G12 structure it may be any cell that this leader belongs to.

Now, you will add the members of the cell. This is done by simply clicking the add button in the cell member associated information tab, and picking the member from the picklist.

You can also enter any activities that this cell is involved with.

Editing Cell Information

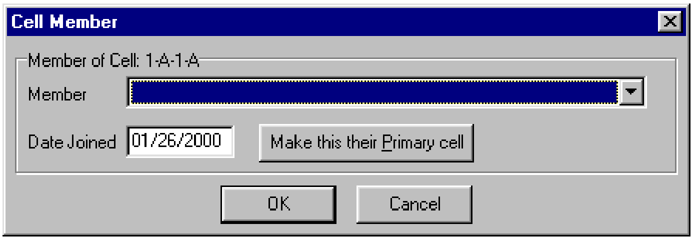
To edit a cell record, simply double-click it, press enter, or use the edit button. Once you've made your changes, save them with the save button, or cancel your changes with the cancel button.

Deleting Cells

There are two methods of deleting cells. If the cell was entered by mistake, or you do not wish to keep any history of the cell and wish to delete it, use the button from the cell browse. This will remove the cell from the database. If you wish to delete the cell, but want to keep history on it, or it is really only going to be inactive for a period of time before re-activating it, then inactivate the cell by choosing the inactive status within the cell's edit screen.

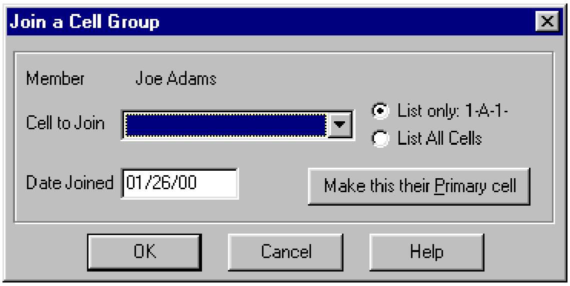
Assigning Members to Cells

Members can be assigned to a cell group from either the member edit screen, or the cell edit screen. To add a cell member from the cell edit screen, choose the cell members associated information tab, and hit the button to add a new cell member.



From this screen, simply choose the member you wish to add to the cell from the member picklist. The members must already be entered into the member module before you can add them to a cell. You can also specify the date the member has joined the cell.

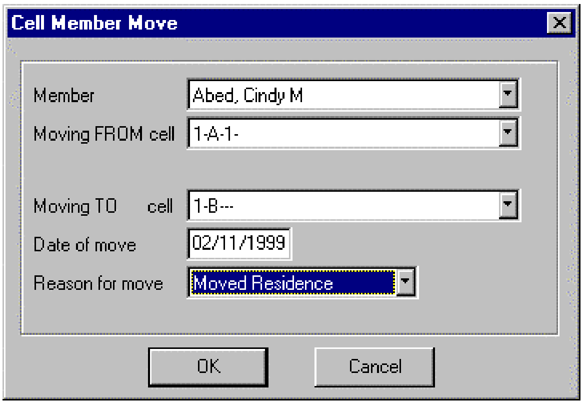
To assign cell members from the member screen, choose the Cell Groups Associated Information Tab from the member's edit screen. Use the button to add the member to a cell group:



From the screen, use the drop down picklist to choose the cell to join. By default, this picklist will show the cells in the division that the member has been assigned to. For example, if the member has been assigned to 1-A-1, or District 1, Zone A, and Section 1, then the cell picklist will only show cells in 1-A-1. To view all of the cells, select the List All Cells option.

Moving cell members

Members can be moved from a cell group from either the member edit screen, or the cell edit screen. From the member screen, choose the Cell Groups Associated Information Tab. Use the button to edit the cell group entry, then use the Move to new cell button to assign the member to a new cell.



When moving a cell member, you choose the new cell group, the data of the move, and the reason for the move.

To move a cell member from the cell edit screen, choose the cell members associated information tab, highlight the cell member, and hit the Moves button. The same Cell Member Move screen will appear will prompt you for information about the move.

Primary and Secondary Cells

Excellerate allows members to belong to multiple cell groups. This can be disabled based on the cell options in the program preferences. If a member joins more than one cell group, you have to choose one of the groups to be their primary group, and all other groups become secondary. The main difference between primary and secondary groups is that the member's primary group will be displayed as the members cell group on all screens and reports. When a cell group is made primary, that group's division codes (District, Zone, Section, etc…) are put in the member's record, therefore assigning that member to those divisions. Member's attendance can be tracked for primary as well as secondary groups, and all of the member's groups will be listed in their cell groups associated information tab.

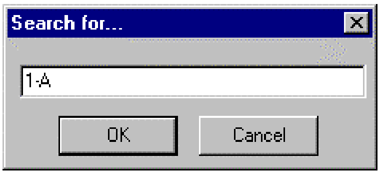
To make a specific cell their primary cell, use the 'Make this their Primary cell' button when adding or editing a cell member. When a cell is chosen as the primary, all others become secondary.

Searching for Cells

There are two ways to search for cells. First, is to use the  find button from the cell browse screen:

This method allows you to quickly search by the cell name field, or another field in the cell table. This type of search will return all cells matching the search criteria in a search results view. Hit escape to return to the previous view.

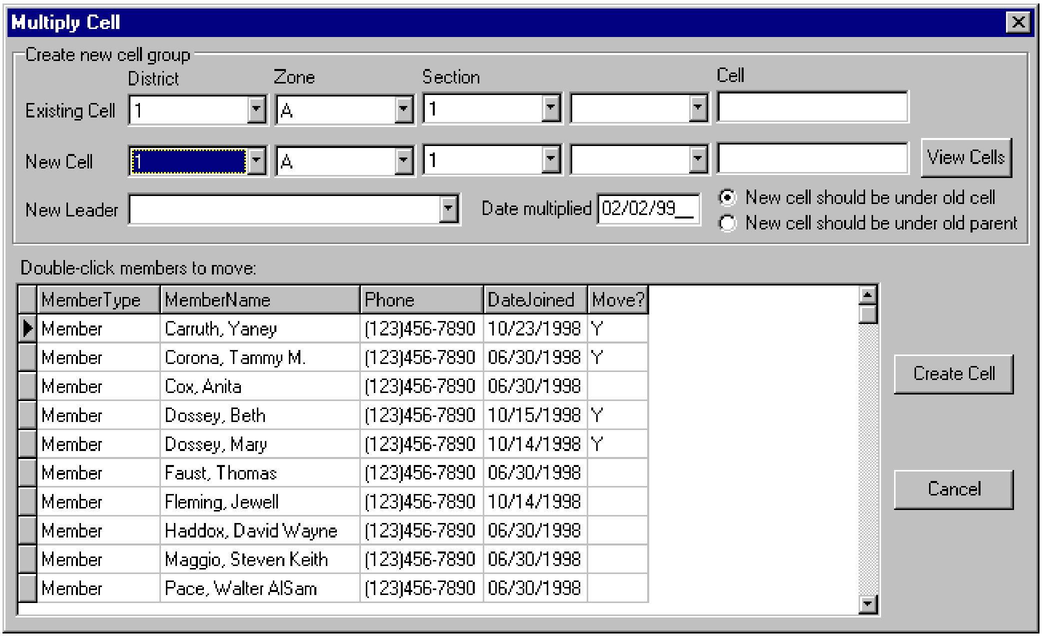
The other way to search is to simply start typing a few letters of the cell name:



The Search for… window appears. This method will take you to the first occurrence of the cell name that matches the search criteria in the current view. This will not find a cell that is not in the current view.

Multiplying a Cell

When a cell group grows in size, it becomes time to multiply into two or more groups. From the cell that needs to multiply, use the Multiply Cell button to create a new cell group and to move members to the new group.



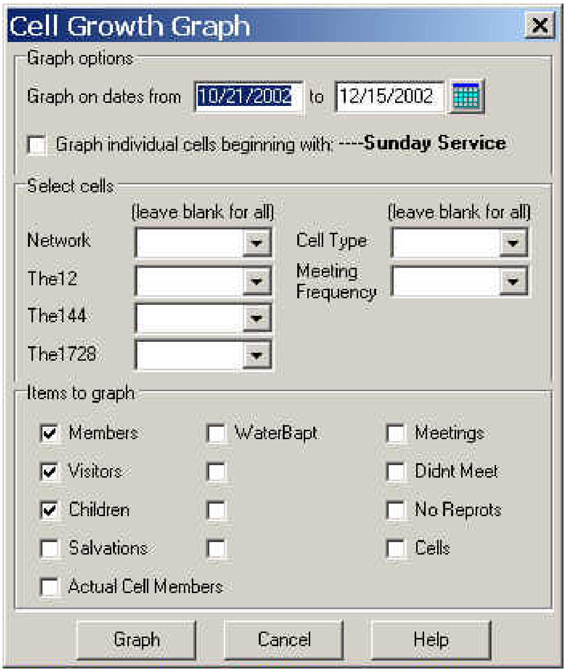
This screen allows you to enter the name of a new cell group, a new leader, and to indicate which members will move to the new group. After hitting Create Cell, the new group will be created, the selected members moved, and the new cell's parent field will be set to the appropriate cell depending on the parent option you checked.

To indicate which members will move, double-click their record, and the move field will change to 'Y'.

If a cell is multiplying into more than two cells, repeat the process for each new cell group.

Viewing Cell Growth

Once a cell has been meeting, and has weekly cell meeting totals entered for it, you can view its growth in several ways. From cell group edit screen choose the Growth button. This will bring up the following screen:



This screen is asking you what information you want to graph. The first question is for what date range. You can enter a date range by hand, or use the calendar button to select a range of dates.

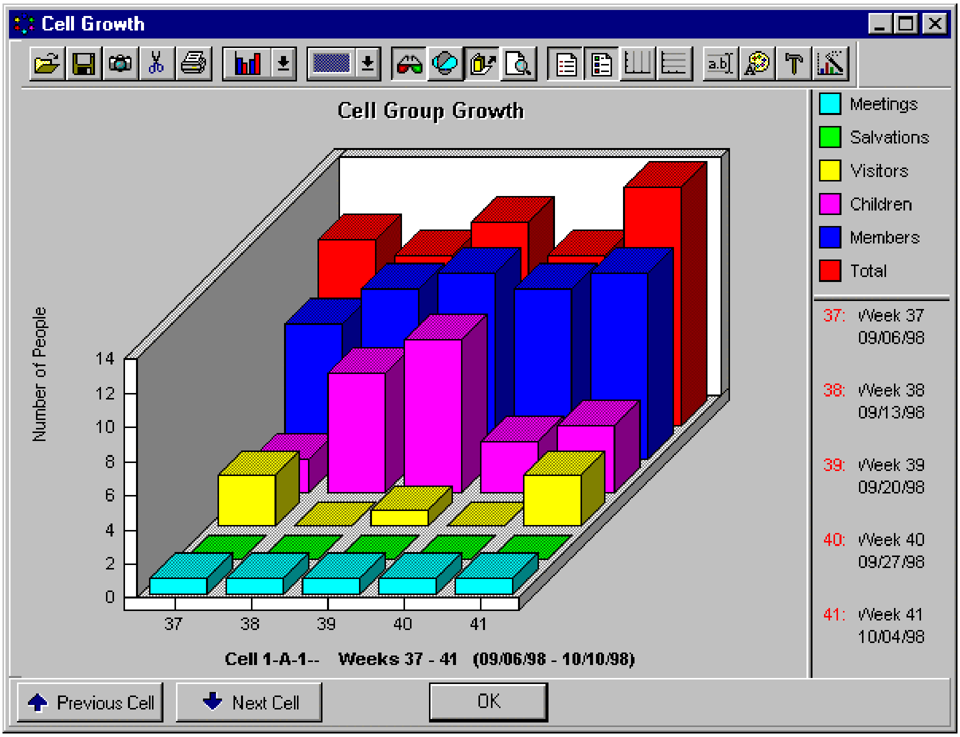
To select a date range, you left-click the starting date, and right-click then ending date. Or, you can select a week by clicking the week number in the left column, or the month or year.

Next you can choose to graph each cells one at a time beginning with the current cell, or you can choose to include a selection of cells by specifying the selection criteria.

Lastly, you indicate which values you want to appear on the graph. The first four items in the left column of the screen are for graphing the number of people attending your groups. The next four options in the middle, are the user-defined totals that you can track for your cell groups. The last four pertain to the number of meetings, reports, or cells. To look at how the number of cells are growing in your church, include that item in the graph.

These graphs are produced from the meeting totals that you will enter each week for your cells. So, if you choose not to enter these totals, you will not be able to graph your churches cell growth.

Hit the Graph button, and you will see a graph similar to the following:



Cells

This graph shows the growth of this cell group by different criteria. The red bars in the back represent the total number of people that attended the meetings. The other bars in front show how many of them were church members, or visitors, or children, etc. You can double-click the top of any bar to see the specifics of that bar. You can choose different representations of this graph by using the tools in the toolbar.

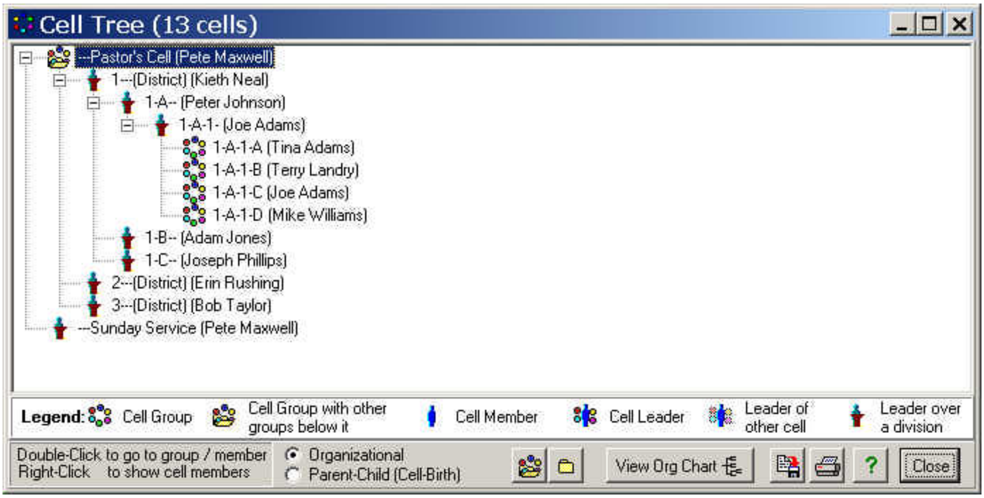
Since we chose to graph our cells one at a time, we can use the Previous and Next Cell buttons to graph those cells. These buttons will display the previous and next cells in our current view. So, if we wanted to look at the groups in zone 1-A in detail, we would choose that view first, then view the graphs for each cell one at a time.

We can also produce this graph for an entire selection of cells. This way we could look to see how a district or zone was doing as a whole. This is done by un-checking the Graph individual cells, and entering our cell selection criteria.

This graph can also be accessed from the  button in the cell browse.

The Cell Tree – A Better View of Your Cell Structure

Once you've entered your cell groups, and assigned their parent fields, you will be able to get an overall view of your cell structure by using the cell tree. The cell tree list your cells in an outline or tree diagram similar to that used by Windows Explorer:

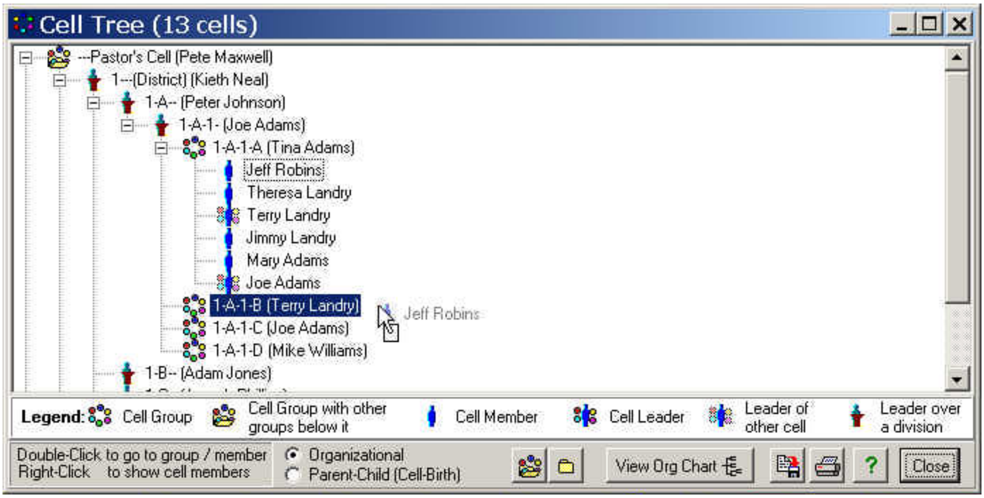


The cell tree will show all of the cells in your current view, and how they appear in your cell organizational structure. The cells that fall under another cell are underneath, and indented. You can collapse and expand different sections of the tree to focus on different areas by clicking on the + or – icon next to the cell.

The cell tree is not only for viewing your cell structure, but also for maintaining it. From this screen you can actually drag and drop entire sections, zones, etc… from under one district to another. You can move cells around, to keep your cell structure balanced. Double-click a cell to go to that cell's edit screen to make any changes.

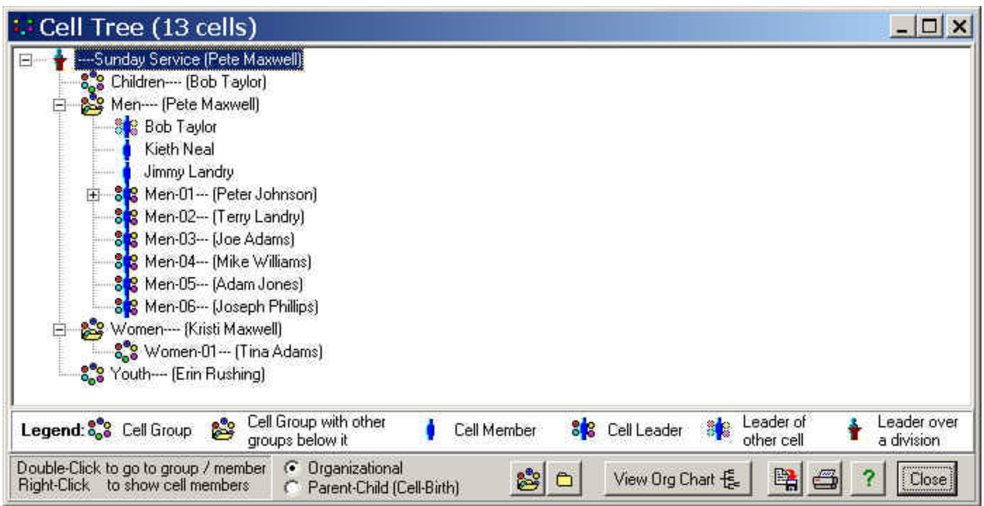
Cells

When you right-click a cell, the cell's members will be displayed:



In this example, we see the members of cell group 1-A-1-A. Just as you can drag and drop cell groups, you can also move cell members. Here, Jeff Robins is being moved from 1-A-1-A to group 1-A-1-B. The normal cell move screen will appear asking for the reason why this member was moved. If you double-click a cell member, you can go to their edit screen to make changes.

In a G12 structure, when you right-click a cell to see it's members, it will look similar to the following:

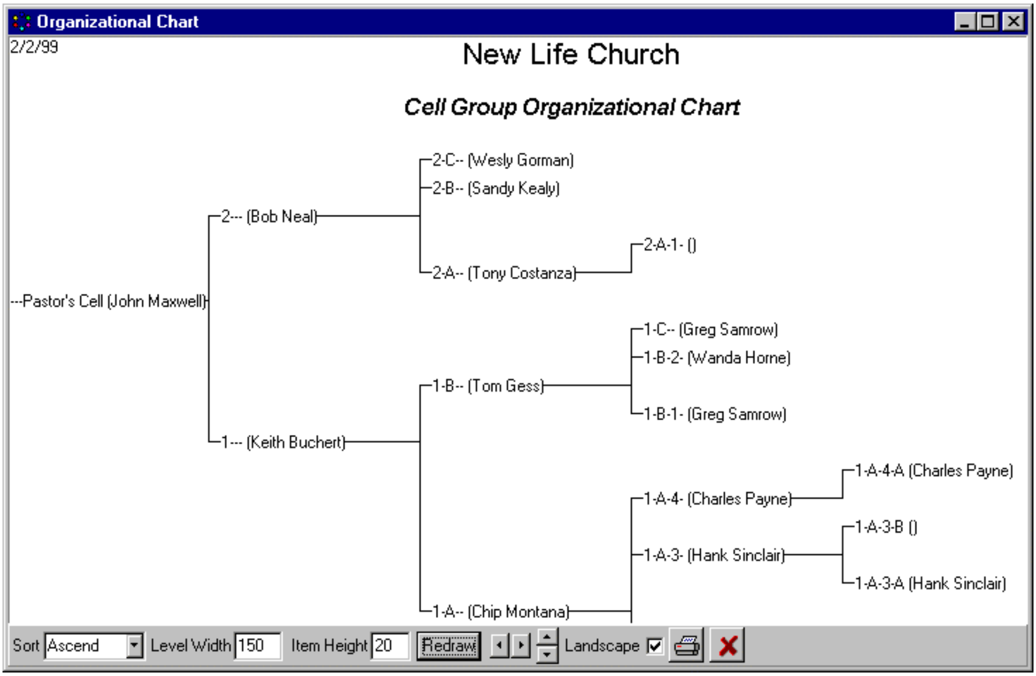


In this example, we see Pete's group of 12. Since he is encouraging his members to start their own cells, we see that several of them have. These are denoted by the picture of a member with a cell around them. Peter Johnson has groups under him.

The Cell Organizational Chart

The cell tree is a helpful view of your cell structure, but sometimes is easier to look at the traditional 'organizational chart' that we are used to seeing. These charts can be impossible to create by hand, especially with a large number of groups.

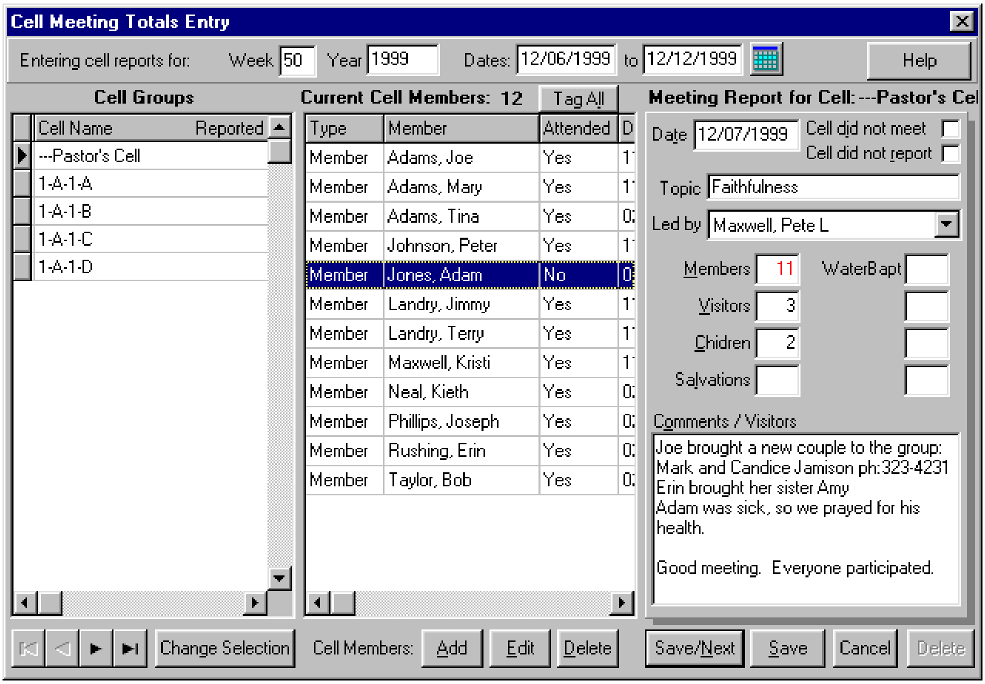
The cell tree can be viewed as an organizational chart by simply pressing the button: 



The organizational chart can be viewed on screen, or printed. You can adjust the width of each level, as well as the height of each item to get the best fit. You can also change the sort order, so that if you turn the chart on the side, to look like a real vertical organizational chart, the cell groups will be in order from left to right.

Entering Cell Meeting Totals and Attendance

The key to tracking your churches cell growth is to record your weekly cell meeting totals. Excellerate helps you do this in two ways. First, by providing cell leader report forms that you print, or log into online each week for your cell leaders. These forms list the existing cell members and provide a place to record the number of members, visitors, children, and other counts that may be of interest to your church. Second, by downloading the totals from the online forms (See the online integration chapter,) or by using the Cell Meeting Totals Entry screen:



There is a lot of information on the screen at first glance, but we tried to put all of the functionality you need while entering cell meeting totals, in one screen. This way you won't have to get out of one screen into another to add a cell member, etc…

Basically, the screen works like this. All of the cells that you are responsible for are listed in the window on the left. This will be the cells in your current view, so if you work with district 1 cells, these will be the only ones you see here. The middle window lists the current cell members of the cell highlighted on the left. The window on the right is where you record the totals for the meeting.

To start entering totals, you simple specify which cell week you are reporting for. You can do this by typing in the dates, or by using the calendar button. Then you just fill in the fields for the meetings. You only have to enter the date and topic one time, and they will be carried over to each cell meeting for you. The person who led the cell meeting will already be set to the cell leader, but you can change that if another member led the meeting. Enter the totals from the cell leader report form, and then hit the Save/Next button. This will save your totals for the current cell, and then bring up the next cell for you to enter totals. So the process is really just entering a few numbers, and hitting Save/Next, until you are done. As you enter your totals, you will notice the date of the meeting appear in the cell list in red. This shows you that a report has been turned in and entered for that cell. The cells without a date have not been entered yet.

When a cell decides not to meet for some reason, it is important that you still make an entry for that cell. All you need to do is check the 'Cell did not meet' box. Also if a cell did not turn in a report, you need to make an entry as well. You can check the 'Cell did not report' box for those cells. When you check 'Cell did not report' the word 'NoRep' will appear in the cell list to remind you that a report has not been turned in for that cell. You can go back and enter a report if it is turned in later.

If you have cell meetings that have been entered using the Web Integration feature, those entries will appear with a red 'w' next to the cell name and date. If an exclamation mark '!' appears after the 'w!' that means that this entry may require additional user intervention. This could mean that there is a new member or visitor that needs to be added to Excellerate. That information will appear in the comments section for this entry.

Occasionally you will need to add a new member to a cell, or delete a member. You can do that right here from this screen by using the Add, Edit, or Delete buttons.

Cell Attendance

You can also track individual cell member's attendance from this same screen. Tracking member's attendance allows you to review an individual's cell attendance history to observe their faithfulness, or to look for signs of continued absence.

To record member's attendance using the Cell Meeting Totals entry screen, simply double-click their name in the Current Cell Members list. Each time you click their name, their attended status changes between Yes and No. You can quickly mark all members present or absent by using the Tag All button.

As members are tagged, Excellerate will automatically calculate the number of members present at the meeting. It is possible to enter a different member count than the number checked off if necessary.

To further ease the process of entering attendance, you may choose how you want the attendance to be marked by default. In the program's preferences screen you can choose to have the attendance default to all present, all absent, or to use the attendance from last week's meeting. You may also choose to turn off cell attendance tracking here.

As cell member attendance is recorded, the information is available in each member's edit screen in their Cell Attendance associated information tab. From that tab you can view an individual member's attendance history.

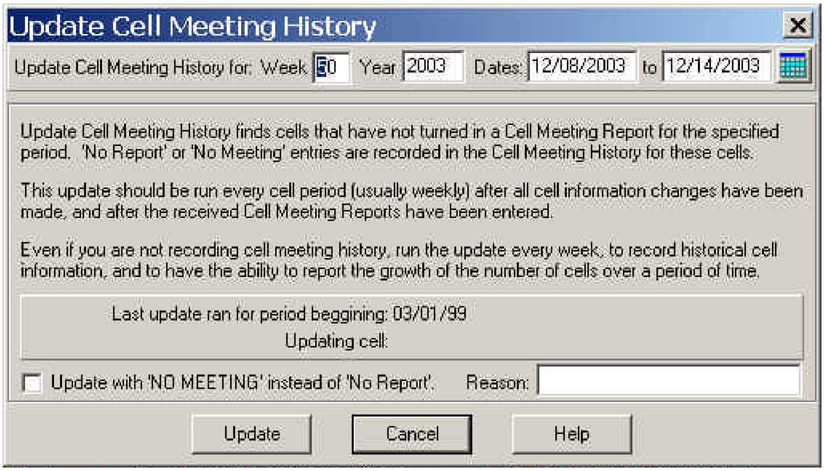
Cell Attendance Reports

By using the '**Cell Member Attendance Chart**', attendance can also be reported in a chart form to easily see a cell's history. This report can be printed for all cells, or any view of your cells such as a district.

The '**Members Who Missed Cell Meetings**' report allows you to list those members who have missed a certain number of consecutive cell meetings.

Updating Cell Meeting Totals

It is important to make an entry for each cell every week. This is how the program knows how many cells you had a few months back before you added a lot of new cells. To make this a little easier for you, there is a routine that should be run each week after making any cell group and cell member changes, and after entering your meeting totals. This routine goes through your list of cells and checks to see if a cell meeting totals entry has been made for each cell. If not, it will automatically enter 'Cell did not report' entry for that cell. This way if you forgot to check that a cell did not turn in a report, the update will catch it and enter it for you.



The update asks you what week you want to run it for. This will be the same week that you've just finished entering cell meeting totals for. It is possible to run the update for a previous week, but remember it will look at your current list of cells, to determine if there was a missing cell report. So, if you have added new cells since the week you are trying to run this for, it will record 'NoRep' entries for those new cells. They can be deleted in the cell edit screen if necessary. There is no harm in running the update more than once for the same period.

Even if you decide not to enter meeting totals, you should run the update weekly. This way it will record the number of cells you had that week and will allow you to graph your cell growth even if you can't graph member, visitor, and other meeting totals.

You probably don't want to run the cell meeting update before you've made all of your cell meeting totals entries. This would cause every cell to show 'NoRep' when you go to enter your totals. This will not cause any problems, but it may be confusing to the users. For this reason, and the fact that you can affect your historical meeting totals by running this for a previous week, you need 'Cell meeting update' security to run the update.

This utility can also be used to automatically enter 'NoMeeting' entries for weeks where your groups are not meeting due to a Holliday.

Once you've completed your cell meeting totals entry, and have run the cell meeting update, you are ready to print out your weekly cell meeting reports. See the Reports chapter for more information.

Example of a Typical Cell Week

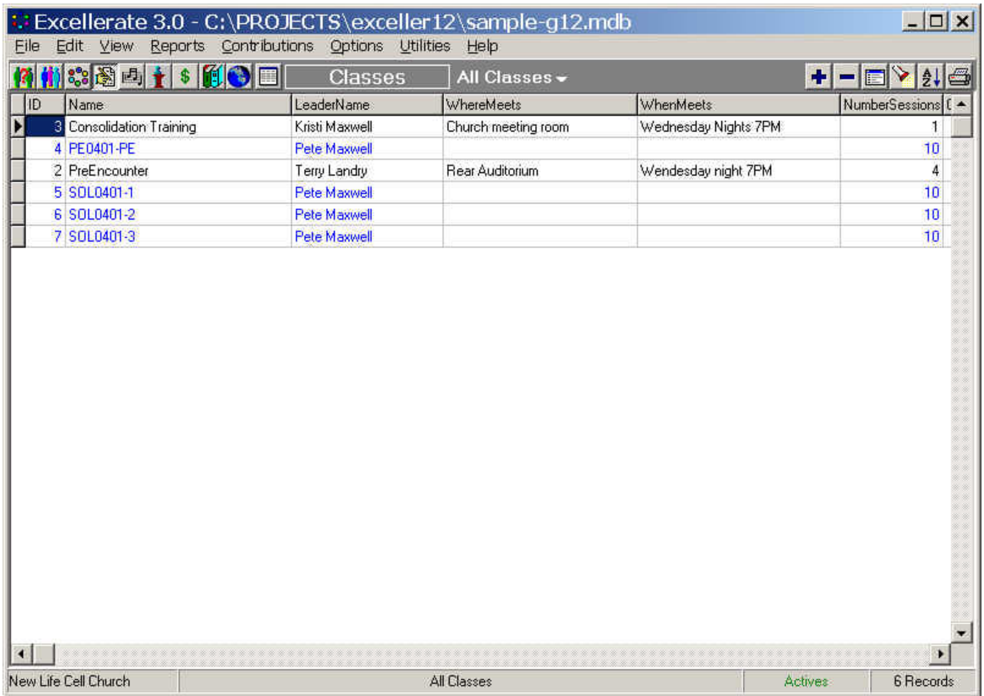
We will take a look at the functions you may perform in a typical cell week to give you an idea of the events that may take place. This is not a required list of activities, this is just an example of some of them that might take place.

Add any new cells that may have been planted.
Update any new cell activities.
Make any cell changes, member changes, moves, etc…
Multiply those cells that may have multiplied this week.
Check cell tree to see if our structure needs to be adjusted.
Send data files to web site if using Web Integration
Print all of the cell leader reports for the week.
Retrieve cell meeting results from the web site if using Web Integration.
Enter cell-meeting totals from the report forms that get turned in.
Print a missing cell reports list to see who hasn't turned in a report.
After all reports are turned in and processed, run cell meeting update.
Print cell summary report for pastor.
Print weekly cell meeting reports for each district pastor.

Chapter 6: Classes

The classes module allows you to enter the classes your church offers. These may be classes that elevate your members to a higher step in their member development, or any other type of class where you need to track attendance.

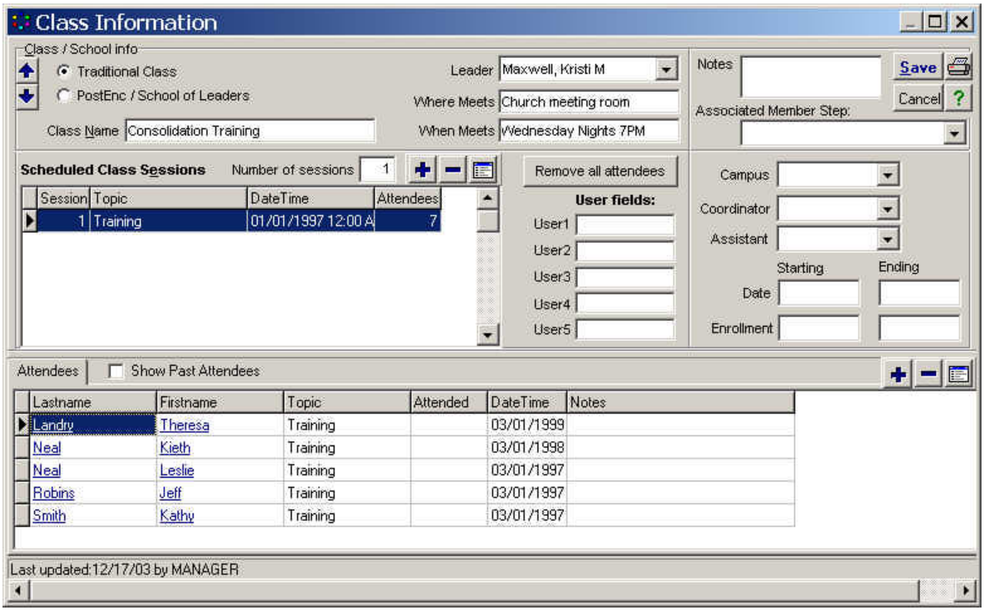
To view the class module, use the button, or hit the F7 key.



Excellerate can track two different types of classes - Traditional classes, made up of multiple sessions, allowing members to sign-up for all, or some of those sessions. Or, if you installed the School of Leaders Module, you can track Post-Encounter / School of Leader classes. These classes track more details relating to the G12 Post-Encounter or School of Leaders. These classes have a fixed number of weekly sessions (10), so sessions do not have to be manually set up for these classes. Also, tracking attendance can be done my simply checking the appropriate week number.

To add a new class hit the add button on the right side of the toolbar. To edit or delete a class, use those buttons as well.

Traditional classes:



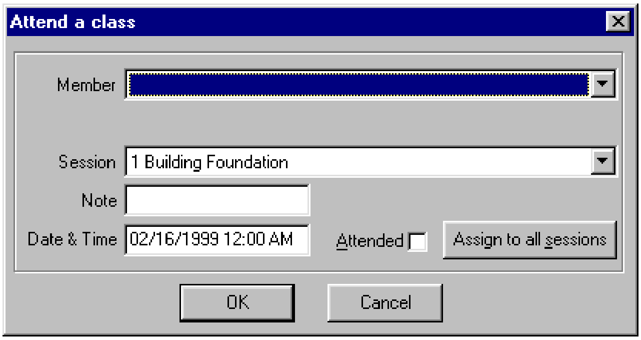
The top section of the screen shows basic information about the class including the class name, leader, and when, where it meets.

The Associated Member Step field tells Excellerate that this class corresponds to one of the member development steps, and that when this class is completed, that step can automatically be updated in the member's record.

The next section lists the sessions that make up this class. (This is only available for a traditional class, not a Post-Encounter / School of Leaders class.) For example, if a class has three parts to it, maybe with three different topics, you would enter each part in this section. Members can then be assigned to a specific session, or to all sessions. To add, edit or delete a class session, use the add, edit and delete buttons in the scheduled class session window. Notice in the window the number of attendees. This number reflects the number of members signed up for this session of the class. As a member completes the session this number is decreased.

The bottom half of the screen lists the **current** attendees for this class. When a member completes a session of the class, they are removed from this list of current attendees, and can be seen by selecting the Show Past Attendees option.

To add a member to a class, simply hit the add button in the attendees tab.



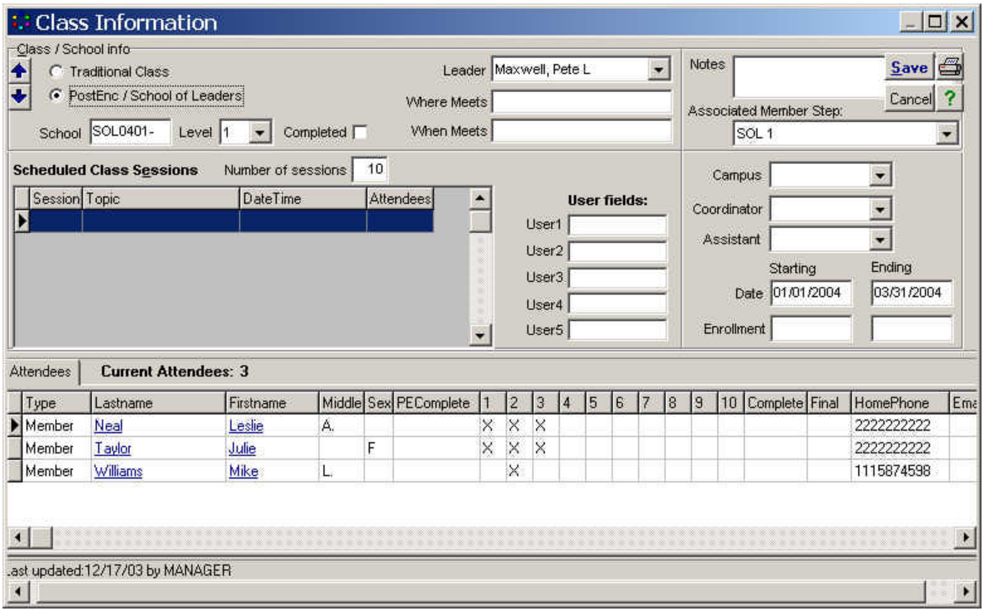
From this screen you can choose the member to add to a specific session, or you could add the member to all sessions of the class by using the Assign to all sessions button. If a class session has already been assigned a date and time, that information will be filled in automatically for you. If the member has already attended this class or session, check the Attended box.

As members complete each session of the class, you can simply double-click their record in the Attended column. This will change their status to Attended for you, and remove them from this list of current attendees. You will still be able to look at the member's screen to see the classes and sessions they have completed, but this screen will only show current or future attendees.

Adding members to classes can also be done from within the members screen.

The Remove all attendees button is useful in cases where this same class is used over and over again by just removing the old students and adding the new ones. This button will quickly remove any remaining students that did not actually attend the sessions.

Post-Encounter / School of Leaders classes:



The top section of the screen shows basic information about the class. For Post-Encounter / School of Leaders classes, the class name is made up of the School name and the Level, so if the school was called SOL0401 and level 1, the class name would be SOL0401-1. This example indicates a SOL Class in 2004 in the first quarter. You can use other naming conventions, but the class name is limited to 8 characters.

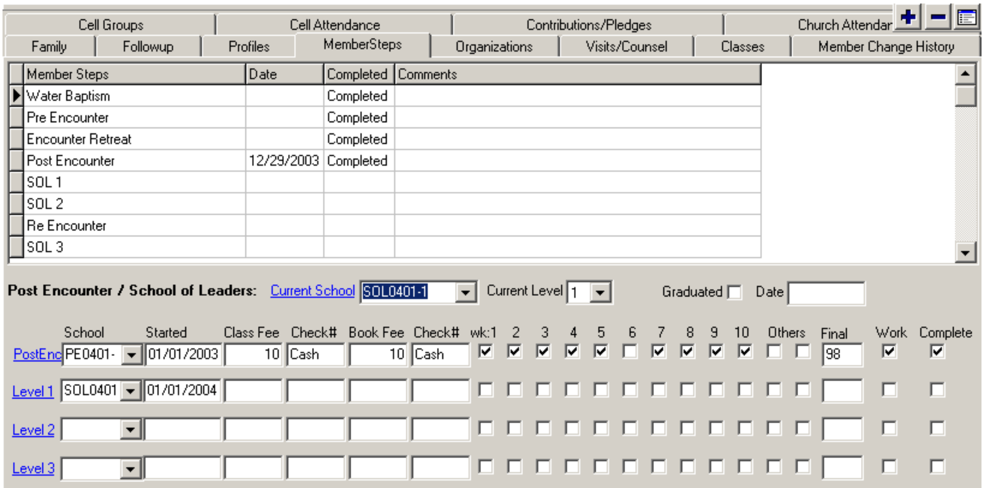
The Completed field indicates whether or not this class has been completed. It is important to update this field because Excellerate uses this information in determining which students to show in the Attendees tab. Also, in the main list of classes, completed classes will be sorted toward the bottom of the list. When this field is checked, it can update all of the current student records as completed as well.

Again, the Associated Member Step field tells Excellerate that this class corresponds to one of the member development steps, and that when this class is completed, that step can automatically be updated in the member's record.

The Scheduled Class Sessions window is disabled for these types of classes, since they are fixed at 10 sessions.

The starting and ending enrollment is useful for determining the retention rate of these classes. The starting enrolment must be entered manually, but when the class is completed, it can automatically record the ending enrollment.

Adding members to a Post-Encounter / School of Leaders class must be done from the member screen in the Member Steps tab. From the member screen you can see a complete picture of the person's class history and requirements before assigning them to a new class:



To assign this member to a School of Leaders level 1 class, select the correct class in the Current School field, and then specify the Current Level. This will automatically set their Level 1 school and starting date.

Once members have been added to this class, attendance can easily be tracked from either the member module, or the class module by simply double-clicking the appropriate week columns.

The member's completed field and the class's completed field must match for Excellerate to show the correct list of students for a class. If the class is has not been completed yet, Excellerate uses the member's Current School field to find it's students. If the class has been completed, it use the other school fields for the appropriate class level.

These classes track students by the class name, not the class ID as in traditional classes, so the class name and the student's school name must match for them to be in the class. When you change a class name, Excellerate will automatically change all of the student school names to keep them in sync.

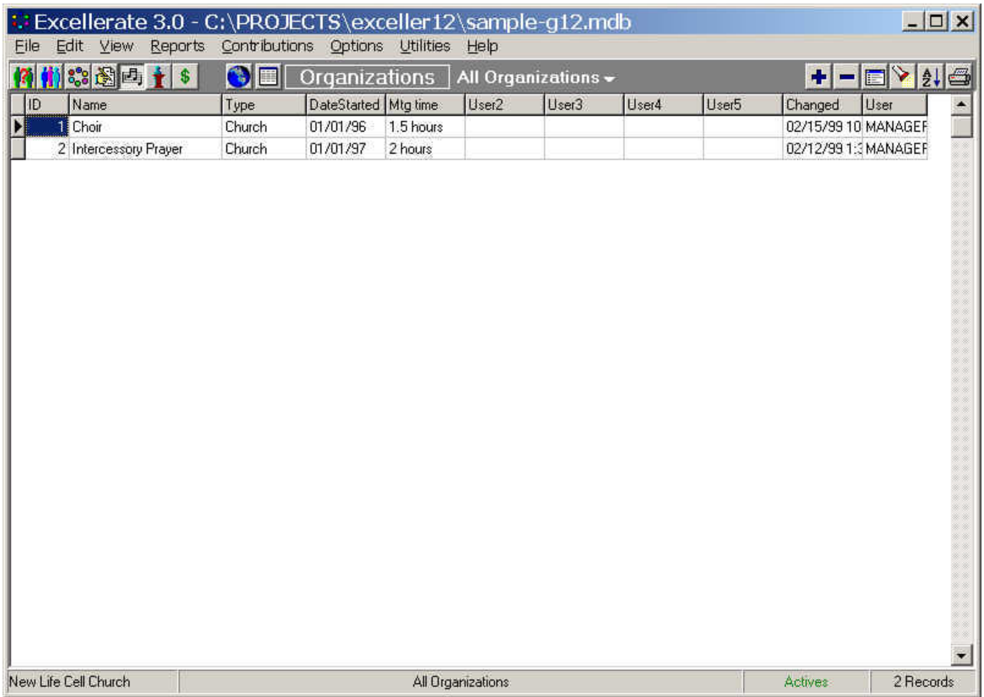
Also, remember you can go between the student and their school screens by double-clicking the blue underlined school or name links.

Barcode attendance tracking

Attendance for Post-Encounter / School of Leaders classes can also be tracked with barcodes. Excellerate works with the Symbol CS2000 hand-held scanner, which scans an attendance sheet containing barcodes printed from Excellerate. Then the scanner can be docked to an Excellerate computer, and attendance imported from the scanner. See the section on barcoding for more information.

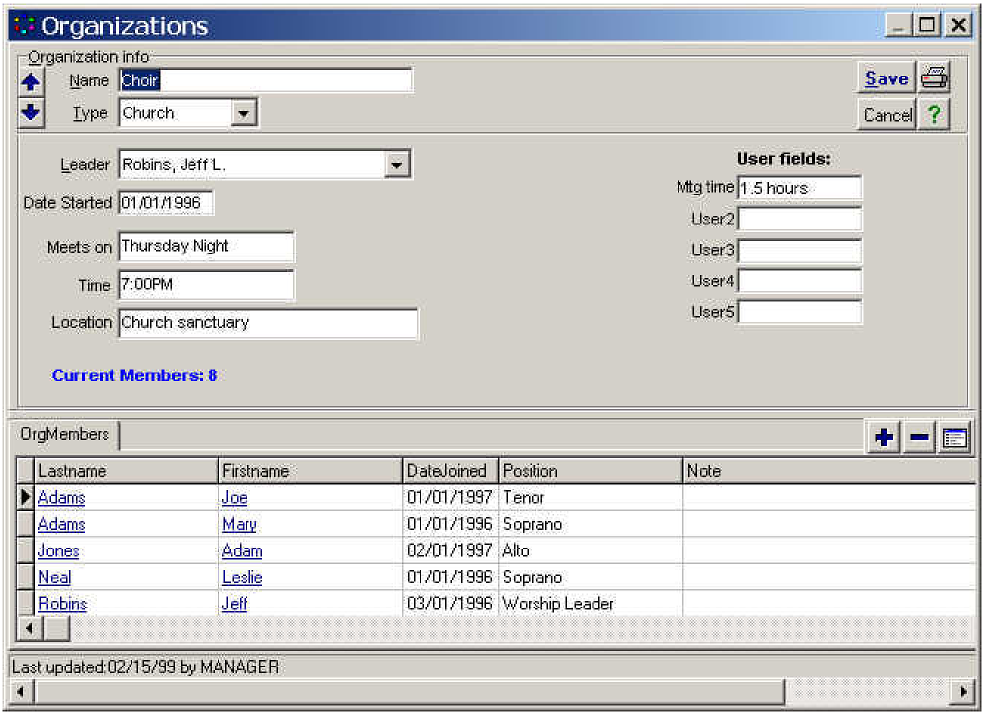
Chapter 7: Organizations

The Organizations Module is used to keep track of church organizations such as the choir, orchestra, prayer teams, or other committees. You could use organizations for any group that does not require tracking detailed attendance. With organizations you basically just assign members to them, and print out member rosters, and other lists. To view the organizations module, use the  button, or hit the F8 key.



To add a new organization use the add button on the right side of the toolbar. To edit or delete an organization use those button as well.

Organization Screen

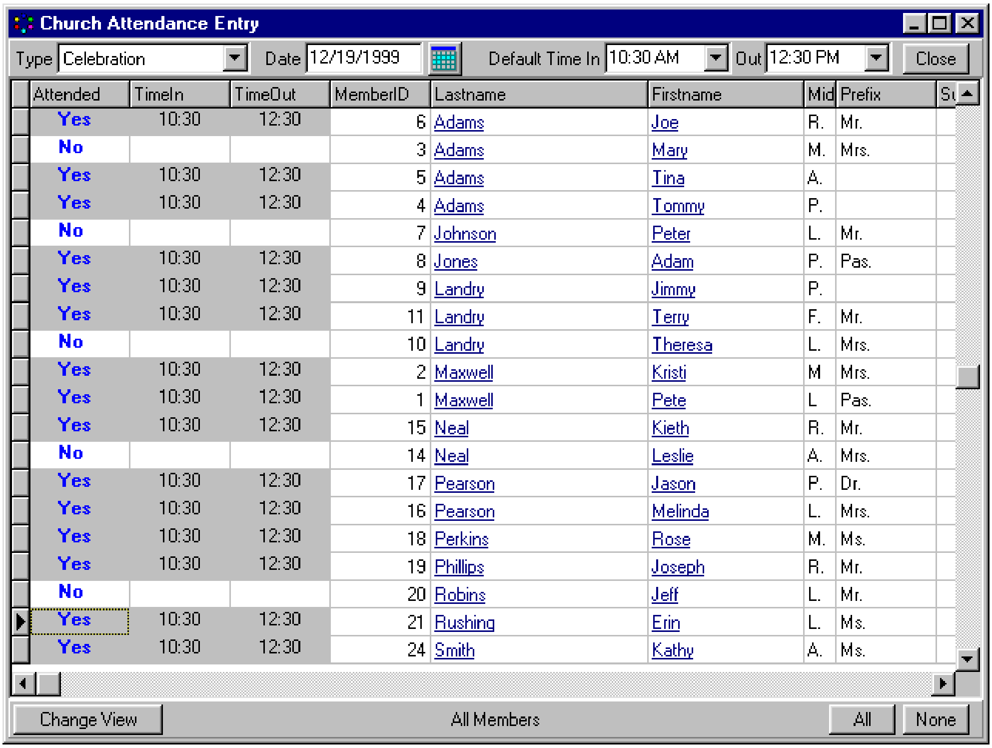


In the organization screen you can specify the type of organization by using the picklist configurable from the picklists options menu. You can also specify other information such as leader, meeting times, and up to five user fields which you setup in the program preferences screen.

The only associated information tab in the organization screen is the organization's members. This tab lists the members that belong the organization, the date they joined, and a position if applicable. Members can be added by using the add button, deleted with the delete button, and edited with the edit button. You can jump directly to a member by double-clicking their name in the member organization information tab. You can also jump to this screen from a member's organizations tab by double-clicking the organization name.

Chapter 8: Church Attendance

Excellerate includes the ability to track church attendance. Similar to cell attendance tracking, you can now record individual member's church attendance. This can be used to track any number of different types of services including children's church. Entering church attendance is slightly different than entering cell attendance because you have all of the members to choose from, not just those who belong to a cell. The Member Module now has a special screen for entering church attendance. This screen lists all of the members in your view, and allows you to check them off if they have attended.



The ability to enter attendance based on a view allows you to use the church attendance feature for more than just Sunday service. For example, if you wanted to use it to track children's church, you would first select a view of all of the children, then hit the Church Attendance button.

This way you only see the children while you are marking attendance. This screen also allows you to record the time in and out if desired. For a Sunday morning service, you can set the default time in and out to the service time, and those times will be recorded for each member. If you set one of the default times to ‘Current Time’, the program will use the current time to record their attendance. This again would be useful for checking children in and out. There are several ways of marking a person attended:

Double-click or press enter in the Attended column will set their attendance and their in and out times.
Double-click or press enter in either of the time columns will set their attendance and only that particular time (in or out).
Use the All or None buttons to mark all members present, or none of the members.

Notice you can also double-click a member’s name to jump to their edit screen. As you mark member’s church attendance, the record of their attendance appears in their member edit screen in the Church Attendance associated information tab.

If you are interested in tracking counts of members, visitors, and other attendance, set up a cell called Sunday Service, or whatever you call your church services, and enter those numbers just as you would a cell meeting report. This way you can report and graph your church growth. Remember you can track totals other than attendance such as the number of salvation’s using this method.

See Importing Church Attendance with Barcodes in the Utilities section of this manual for information on how to use bar coding with church attendance.

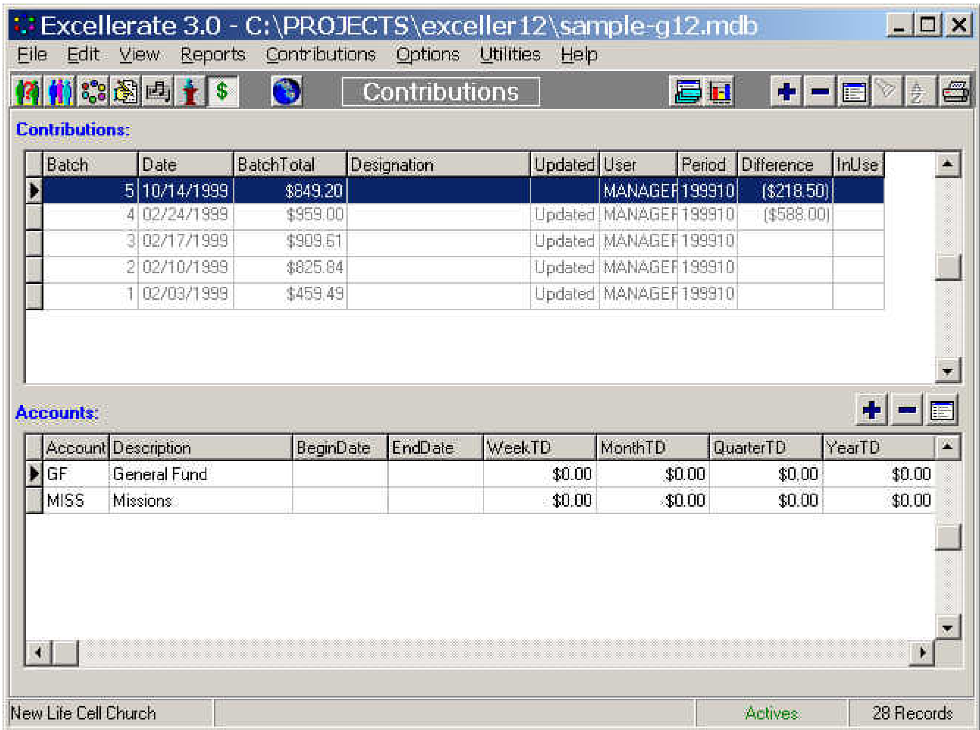
Church Attendance Reports

Member church attendance can be reported in a chart similar to cell attendance. You can view approximately 6 months of attendance at a time.

A church attendance report style has also been added to the Member Lists and Labels report to allow you to report individual member attendance.

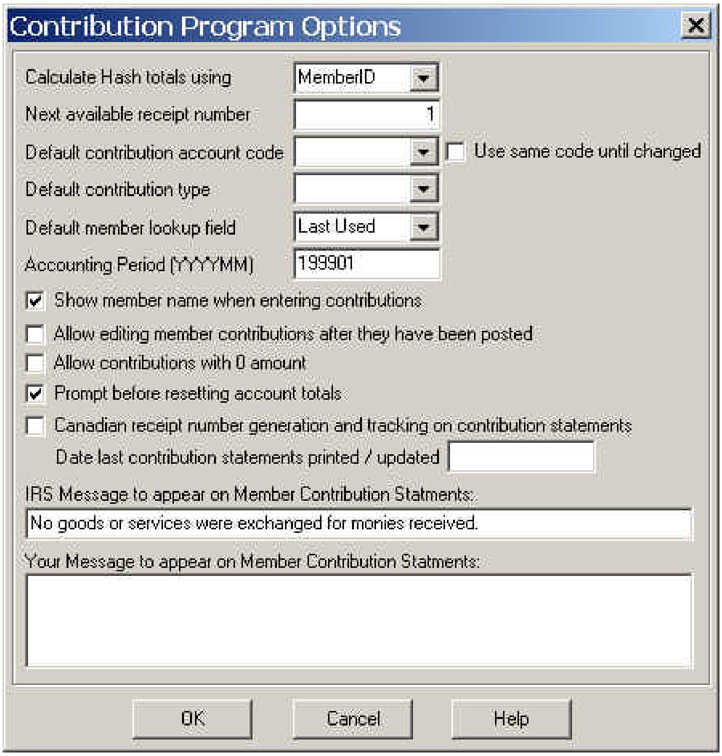
Chapter 9: Contributions

The contribution module is designed to record member contributions so that you can print member contribution statements at the end of the year, or as often as you wish. It is not a complete financial system, but will handle the tracking and reporting of all income received from your church members. The contribution totals can then be exported periodically to your financial system for further analysis. This approach offers a good, clean separation of data because Excellerate is your complete member information database, and your financial system can handle the other accounting needs of your church without you having to update member information in two systems. To use the contribution module use the Contribution button $ or hit F10:



Contribution Settings

Before using the contribution module, you should verify several program options within Excellerate to ensure they are set according to your church operation.



Hash totals – While entering contributions, Excellerate can calculate hash totals for you to ensure that all of the contributions have been entered correctly. Hash totals are either the sum of the member IDs or envelope numbers that are entered into a contribution batch. You would compare your pre-calculated hash total to the one generated by the program to verify all contributions have been entered. You can choose to calculate hash totals by Member ID, Envelope #, or None.

Next available receipt number – Excellerate assigns unique receipt numbers to each contribution so that a receipt can be printed if necessary. This option allows you to choose the next available number.

Default contribution account code – When entering contributions, Excellerate can set the default account code to any of the accounts you have set up. This way you can reduce the number of times you have to choose an account code. See Accounts later in this manual.

Use same code until changed – When entering contributions, you can tell Excellerate to always use the same contribution account code until it is changed. Otherwise, it will default every time to the default code specified in the previous field.

Default contribution type – Again like account codes, you can set the default contribution type here. You can set up any kind of contribution type in the picklists menu option.

Default member lookup field – When entering contributions, you can lookup members by either their MemberID, Envelope #, or Last name. Set this field to whichever method you will use most.

Accounting period – Excellerate tracks contributions according to the accounting period. Here you can set your current accounting period. The accounting period is only used to calculate contribution totals for the various periods such as month-to-date, quarter-to-date, etc…

Show member name when entering contributions – This option allows you to hide the member's name when entering contributions. If your church uses the member ID or Envelope # to enter contributions, you can keep the member's identification private so that other people in the room will not see the member's name. This option disables the ability to look up members by last name during contribution entry.

Allow editing contributions after they have been posted – If you want to be able to add, edit and delete contributions after they have been updated from batch entry, check this box. Typically you would not want to allow this, but if your church is smaller, and doesn't require the batch entry process, contributions could be added by going to the member edit screen, and to the Contribution associated information tab.

Allow contributions with 0 amount – This allows posting special contributions, such as stocks, where you do not have an actual dollar amount, but you want to record the contribution.

Prompt before resetting account totals – When Excellerate detects the current date has changed into a new month, quarter, or year, it will prompt you to be sure it is ok to advance the system to the next accounting period, and to reset the old monthly, quarterly, or appropriate totals. If you do not want to be prompted uncheck this box.

Canadian receipt number generation and tracking on contribution statements – This option is available for countries such as Canada, that require receipt number tracking on their contribution statements. This option will generate unique receipt numbers for each statement, and those numbers will be stored in the member's change history. Once the statements have printed correctly, those contributions are protected from generating a new receipt number, but those statements can be re-printed with the original receipt number by choosing the re-print report style.

Date last contribution statements printed / updated – When the Canadian option is selected, this field records the date of the last contribution statements that were printed. Excellerate will then prevent generating new receipt numbers for these same contributions. You can reprint those statements by using a **'re-print'** report style. This style will use the same receipt number that printed on the original statements. Basically, Excellerate will prevent the use of a report style that generates a new receipt number for contributions earlier than this date.

IRS Message to appear on Member Contribution Statements – This allows you to enter the required IRS message that should appear on the Member Contribution Statements.

Your message to appear on Member Contribution Statements – This allows you to enter your own message on the statements.

Contribution Security

There are two ways Excellerate secures your contribution information. First, you can grant different levels of access to individual users by setting their User Access codes in the User IDs setup screen. To prevent any access to financial information, leave the financial field blank. To allow read access only, enter the letter 'R'. To allow read and update access, which includes adding and editing contributions, use the letter 'U'. To allow full access, which includes deleting, use 'D'. There is one other special level denoted by the letter 'G'. 'G' will allow a user to see the last date a member gave, but not any other giving details. This applies to the financial field only. The following options require Delete and Update access: change accounts, reset or reverse-update contributions, end of period processing.

The second way is to allow you to set a database password. This will prevent users from opening the database with another program other than Excellerate without knowing the password. To set the password, use the Set Database Password option in the utilities menu. See the chapter on utilities for more details.

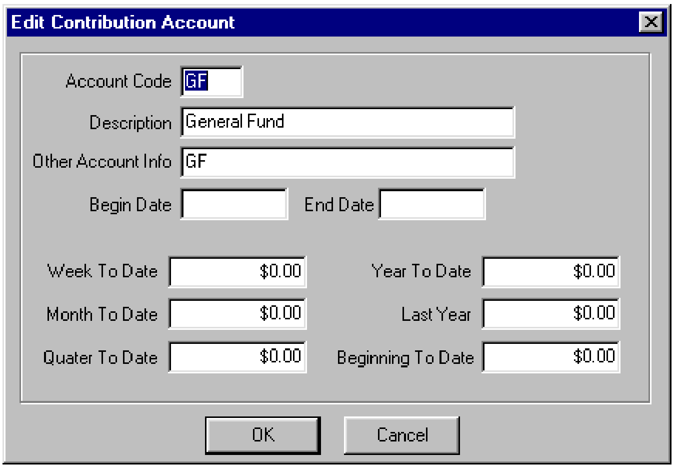
Contribution Types

Excellerate allows you to set up the various types of contributions that you wish to track. The default types are Cash, Check, Credit Card, Money Order, and Other. You can set up these types using the picklists menu option and choosing 'Contributions.Type' for the field. Summaries can be printed on the various contribution reports showing break downs for these different types.

Contribution Accounts / Funds

Contributions can be posted toward any number of different accounts or funds. For example, you may want to designate contributed money for a certain purpose such as missions, a building project, or a general fund. Then as contributions are received, they are totaled into the different accounts so at any time, you can see how much money your church is receiving in these different areas. Each account records a weekly, monthly, quarterly, yearly, last year, and beginning-to-date totals.

To view the contribution accounts, go to the contribution module by using the contributions button, or by hitting F10. In the contribution module you will see two areas. The top portion lists the contribution batches, and the bottom portion lists the accounts. To add, edit, or delete an account, use the add, edit, or delete buttons in the bottom portion of the screen.



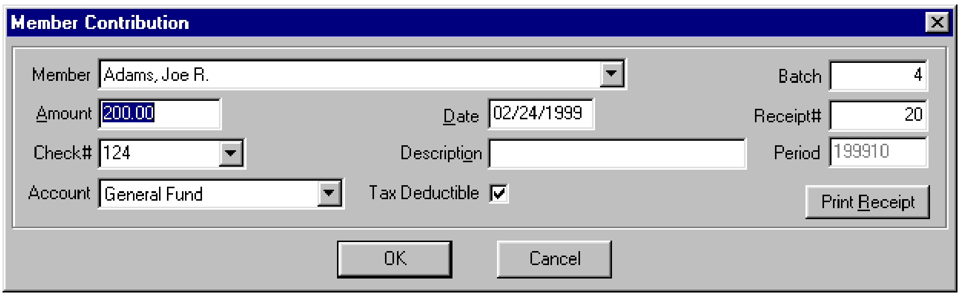
When entering a new account, you must specify an Account code and description. The account code is a short code use to specify the account when entering contributions. This code can be numbers or letters up to four in length. You may also specify other account information. This can be used to specify a bank account number, or other values that may be useful to you financial system if you plan on exporting your contributions. If you are exporting to Quicken or QuickBooks, for example, you can specify the Quicken category that corresponds to this account. The begin and end dates are available for your information only, and do not affect how contributions are recorded. These may be useful for planning different projects such as a new building.

The accounts you set up here will also appear on the member contribution statements if your members have contributed to these accounts.

These account totals can be exported by using the Export Account Totals menu option in the Contributions menu.

Contribution Records

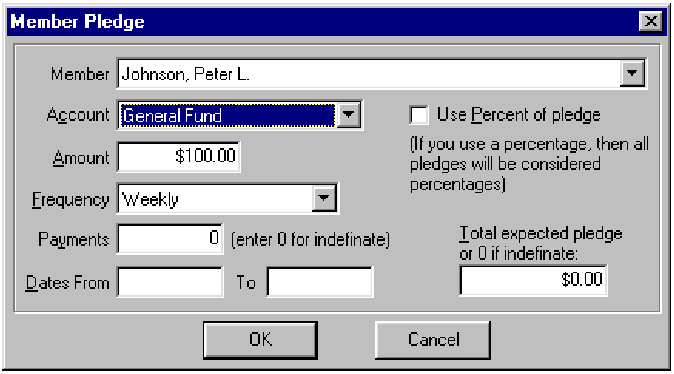
Excellerate can track many types of member contributions including cash, checks, credit cards, etc. Tax-deductible as well as non tax-deductible items can be recorded. A description can be entered for more detail, such as specifying a particular missionary, etc…



Each contribution is tied to individual members, but can be reported for their whole family. This allows contributions to follow a child who gets married, etc. The Check # field allows you to enter a check number, or you can enter one of the other contribution types such as cash. Different types can be added using the Options, Picklists menu. Each contribution must be designated for a specific account or fund, which can be chosen from the picklist. Also, the date, batch number, receipt number, and accounting period are recorded.

Pledges

Pledges can also be entered for members. This can help during contribution entry, and allow you to get an idea of what your projected income will be for the different accounts. Each pledge must be designated for a specific account. Pledges can be actual amounts, or allocated as percentages. They are not entered automatically into Excellerate, but they can be used during contribution entry, to enter their pledged amounts for you.



The frequency and payments fields allow you to specify how often this amount will be given, and for how long. They are only used for projecting future income in the pledge reports and graphs, not for automatically entering the amounts. You must specify a from date when entering a pledge, and the to date is optional. These dates are used to project future income, as well as controlling whether or not the pledge is enabled during contribution entry. If the current date is outside of the pledge's dates, you will not be able to use the pledge to post contributions for you. The total expected pledge field is only for your information, and not used in any calculations.

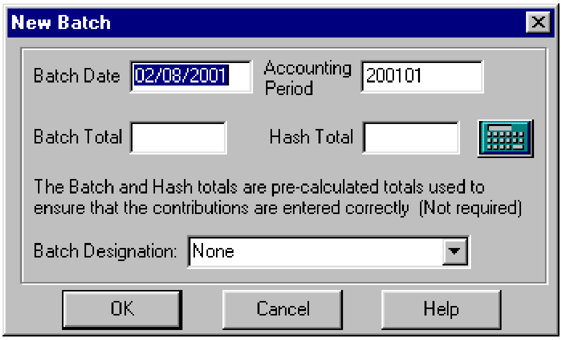
Entering Contributions (Batch Processing)

Excellerate processes your contributions in batches using a streamlined contribution entry system. You simply create a batch, enter all of the contributions for that week or month, or whatever period you desire. Then print the batch report, and update. When you update the batch, all of the entered contributions are posted to the members.

Contributions

Create a new batch

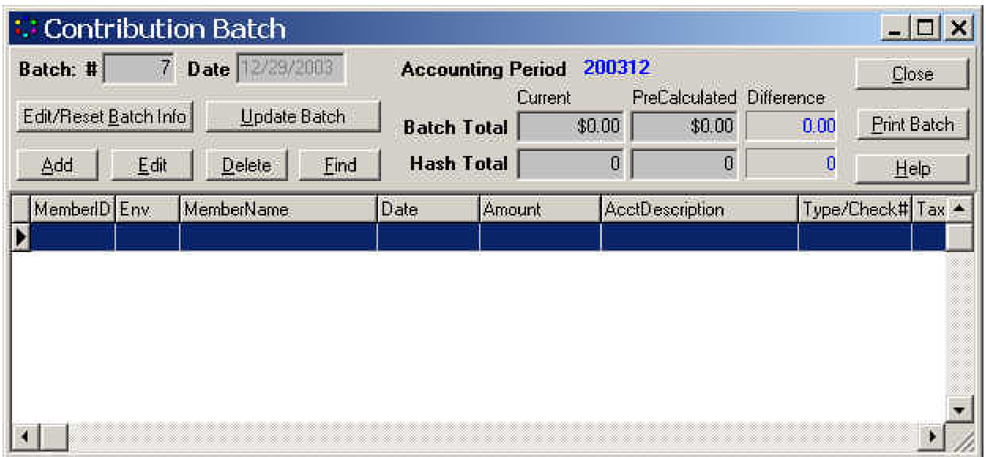
To create a new batch, go to the contribution module by using the contribution button, or by hitting F10. The top portion lists all of the batches that were entered. To add a new batch click in the batch list screen, then hit the add button.



Enter the date for this batch, and verify that the displayed accounting period is correct. You may change the accounting period for the batch if necessary.

You also have the option of entering your pre-calculated batch or hash totals for the program to use to compare against running totals generated during the contribution entry process. These totals will help ensure that there were no data entry errors made. The batch total is simply the sum of all of the contributions that will be entered. The hash total can either be the sum of the member ID's, or the Envelope numbers used during contribution entry. These totals do not have to be used. If you wish to designate this batch for a particular purpose, or bank account, etc… use the Batch Designation field. Entries for this field can be setup in User Picklists.

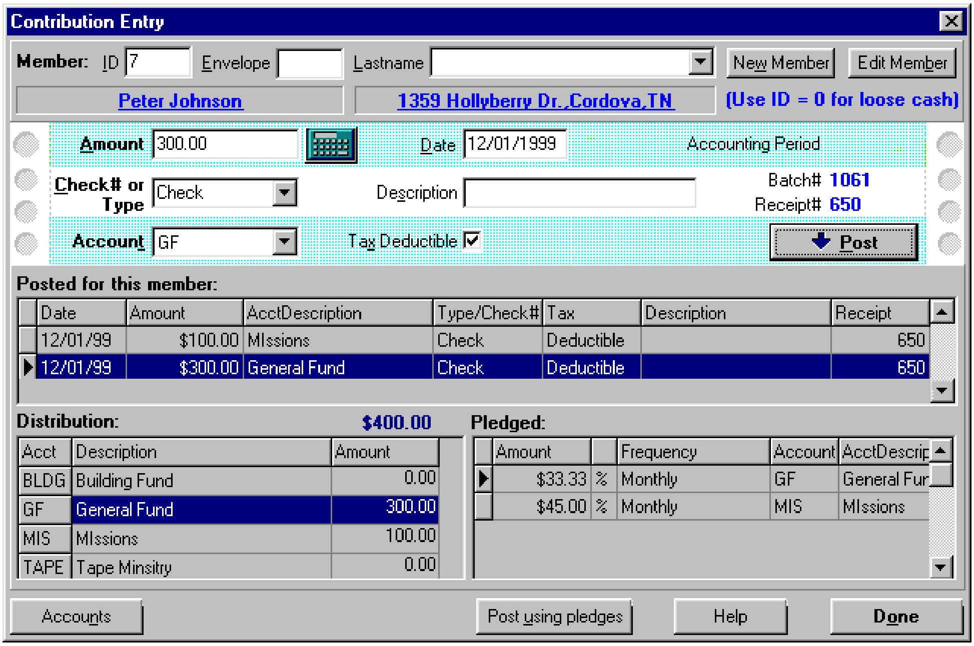
Next, the Contribution Batch screen will appear:



This screen will list each contribution entered into this batch. At the top you will see the batch number, date, accounting period, batch, and hash totals if entered. For both the batch and the hash totals you will see the current amount, which represent the total of the contributions entered into the batch, the pre-calculated amount entered by the user, and the difference. The difference totals should be zero if the batch was entered correctly.

Entering the contributions

Entering contributions is quick and easy with the contribution entry screen. To begin, use the add button or hit insert.



With this screen you simply enter the Member ID or Envelope number, tab to enter the amount, check # or type, and then hit enter. Repeat this process for each contribution to be entered. Notice that if you don't know the member ID or Envelope number, you can always use the name search field. Just start typing a few letters of the last name, and the member will be selected for you. You can change the account that the contribution is designated for, if necessary, but this can be defaulted to any account you have set up.

As you select members, their name and address will be displayed directly below the input fields so that you can verify this information. You can also add or change members on the fly by using the relevant buttons, or double-click the underlined member name or address to jump to that member.

As you enter contributions for this member they will appear in the **Posted for this member** window. This window shows all entries posted for this member in the current batch. You can change any one of these by clicking on the entry. The distribution window in the bottom left, will show how the contributions for this member were distributed into the different accounts. For example, if a member gives $400, where $300 is designated for the general fund, and $100 for missions, you will see the total contribution for the member, then the $300 and the $100 in the distribution window.

Notice the Pledge window on the right side of the screen. This window lists any pledges for the selected member. If the pledges are active (their dates are current) you can use the 'Post using pledges' button to post these amounts as a contribution.

When you are done entering contributions into the batch, use the Done button. This will exit the entry process, and take you to the batch screen.

Editing a contribution

From the batch screen you can add, edit, or delete contributions. To edit, simply double-click the contribution, or highlight it and press enter. The contribution will appear as if you were entering it. All of the member's contributions will appear in the **Posted for this member** window, and you can click on any one of them to change them.

To delete an entry, highlight the entry in the batch screen, and click delete.

Moving a contribution

If a contribution was posted to the wrong person, maybe there were duplicate members, and you need to move the contribution to the correct person, you can use the Move Contribution button in the member's contribution tab. This will simply remove the contribution from the current member, and post it to the correct member. The batch that the contribution was entered in, will not be affected other than it will now show the correct member.

Loose Cash

Loose cash contributions can also be entered into Excellerate, even though it is not posted to any particular member. This is helpful so that you can track and report the total amount of income received regardless of whether or not you know whom it was from. To enter loose cash during batch entry, just choose a member ID of zero. This will post the contribution to the Loose Cash Contribution screen. These contributions will not be reported on the Member Contribution Statements, because they are not assigned to any member, but will be included in any contribution reports. These contributions can be viewed and edited using the Edit Loose Cash Contributions menu option.

Updating Batches

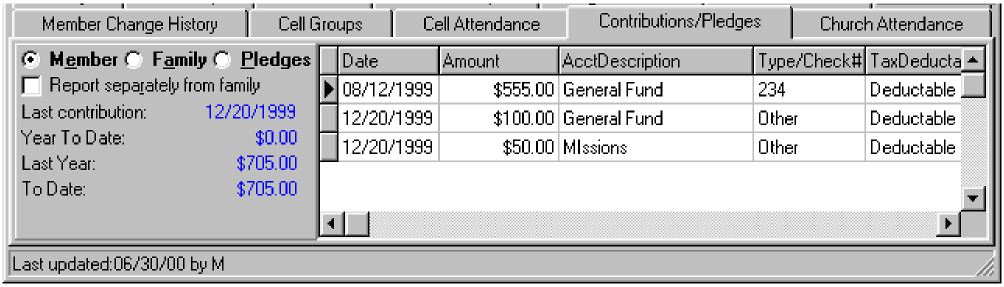
After entering your contributions into batches, you need to update them to the members. Updating a batch moves the contributions for that batch into the member's contribution file. Batches can be updated one at a time, several within a batch number range, or all the batches entered for a specific user. To update the current batch you are working on, use the update button on the Contribution Batch screen. Or, you can use the Update Contribution Batch menu option. Once a batch has been updated, it is closed, and contributions no longer get posted to it. If a mistake has been made it is possible to reverse-update a batch, make the corrections, and update it again. Before the batches are updated, you have the option of exporting the batch totals to your financial system. See exporting contributions later in this manual. You can also print a batch report at this time, which lists each contribution along with a summary by account and type at the bottom of the report. These batch reports could be used to match up against bank deposits.

Reverse-Updating Batches

Once a batch has been updated, it is closed to further contribution postings. If a mistake was made in a batch that has been updated, or you forgot to export the batch before it was updated, you can reverse-update it. This process brings back the contributions from the member's file to the batch. At this point you can continue adding, editing, or deleting contributions until you are finished. Now the batch can be exported if necessary, and updated again. Batches from earlier accounting periods can be reverse-updated, and modified, and the changes to the batch will be counted in the accounting period of the batch, not the current period.

Viewing/Editing Member Contributions

Once a contribution batch has been updated, those contributions are posted to the members file. To view those contributions choose the Contributions/Pledges associated information tab in the member's edit screen.



This screen allows you to see the member's giving summary along with their contributions, their family's contributions, or the their pledges. These different views can be selected by choosing the appropriate button on the left of the screen. If the program options allow users to modify contributions after they have been updated, you will be able to add, edit, or delete contributions here within a member's edit screen.

Typically, contributions are reported for the entire family in one statement. If you want certain family members to receive their own individual contribution statement separate from the family, you can check the 'Report separately from family' box. This is useful for adult children living with their parents.

Remember this information is only displayed if the user has the proper security access.

End of Period Processing

In order for Excellerate to calculate periodic contribution totals, it must use an accounting period. This period tells the program what month and year you are working in, and calculates weekly, monthly, quarterly, and yearly totals accordingly. Excellerate will automatically prompt you when it is time to reset these periodic account totals when the computer's date advances to the next month. Before resetting these totals, you should print your accounting reports, so you have a copy of these numbers. These totals are just for your information, and do not affect how the system functions. You can choose to have Excellerate automatically update these totals without prompting you using the settings in the program preferences.

Exporting Contributions

Excellerate can export contributions in two ways. First, you can export the contribution batches as they are updated. When updating contribution batches, choose the 'Export batches to accounting system' button. This will export the account totals for the batch, one record for each account. These exports might represent deposits being made to a checking account, and can be imported into your financial system. The second export is the account export. This will export the current account totals for all of your accounts. You may choose which total to export such as week, month, quarter, etc… Currently Excellerate exports in text format or Quicken/QuickBooks QIF format. When exporting to Quicken, Excellerate will use the information in the account's 'Other Account Info' field as the Quicken category to post to. If using some other financial software, this field may be used for a similar purpose such as general ledger account numbers.

Resetting Contribution Totals

If you ever experience a power outage or other computer problem during contribution entry, you may find that a member or account total does not match the contributions entered in the system. If this happens, you can use the reset contribution totals menu option which will cause Excellerate to go through all of the contributions and recalculate each member's totals and the account totals.

Removing Old Contributions

Excellerate can store years of contribution data even after all of the reporting has been done for those years. This allows you to continue to report and analyze giving history for those years. Although it is convenient to have that data on hand, you may be able to improve performance in the contribution module by removing those old contributions. The remove old contributions option allows you to first make a copy of your current database to a backup file, then to delete contributions for previous years that have already been reported. This way, the size of your current database is reduced improving performance, and you can always open the backup copy of the database to access the removed contributions. After removing the old contributions, it is a good idea to run the Reindex/Compact utility.

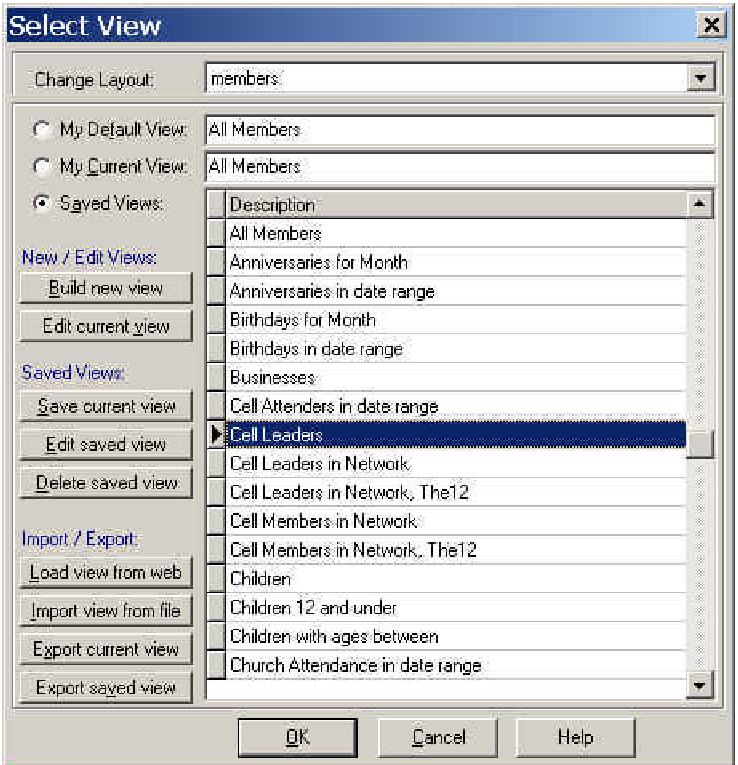
Removing Old Locks

Once again if you experience a power outage during contribution entry, you may find that a batch is left in the 'In use' state preventing anyone from working in the batch. If this happens you can use the remove old locks menu option to remove any database locks left open. Make sure no other user is logged into the system when you do this.

Chapter 10: Views

What are Views?

A view is basically a subset of the records for a particular module. Views allow you to look at the records your interested in. This can make working with the database much easier because you are only looking at the information relevant to your task. Each module has its own set of views. For example, the Member Module will have views relating to members as in the following:



If you wanted to use a cell view, you would have to be in the Cell Module. Views also play an important role in reporting. If you want a report of all members who have a birthday this month, you would first select the view ‘Birthdays for Month’, then specify the month. The member browse will then show all members who’s birthday is in that month. Now you can report on these members in several ways by choosing the appropriate report, labels, or mail-merge from the reports menu.

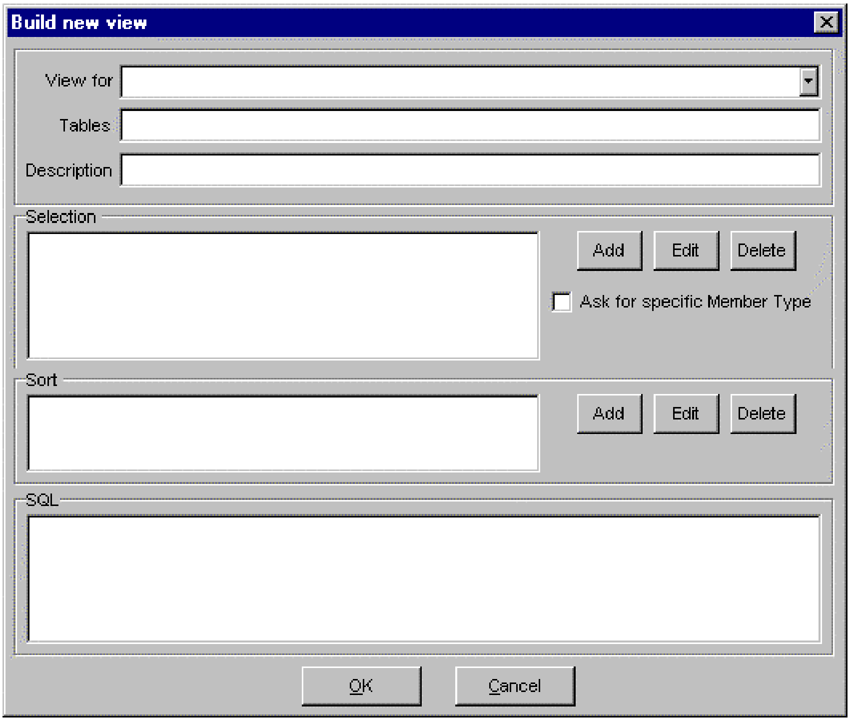
Selecting Views

To select a view, simply use the 'Select different view' button from the toolbar, or the Select different view option under the view menu, and choose the desired view. You can choose the current view, one of the saved views that are available to all users, or your default view, which is defined by your default view parameters assigned to your user id.

Most views have prompts built into them. These views will ask you for a view criteria such as 'what district', 'what member type', etc. By prompting the user for these values, you don't have to have a separate view for each district, or member type, etc…

Creating a New View

Excellerate comes with several common views built-in, but undoubtedly you will want to create your own. This can be done by using the Build new view button in the Select view screen. When you build a new view, you are actually building a 'query' or an SQL statement for the access engine to process. Instead of having to write this statement by hand, the Build new view screen builds it for you by asking a few questions:



The Build new view screen asks the following questions:

What module is this view for, and what kind of information should we get?
What do you want to call this view?
Which records do you want to select?
How do you want them sorted?

The first question is answered by choosing an entry from the picklist. For the member module, you have the following option:

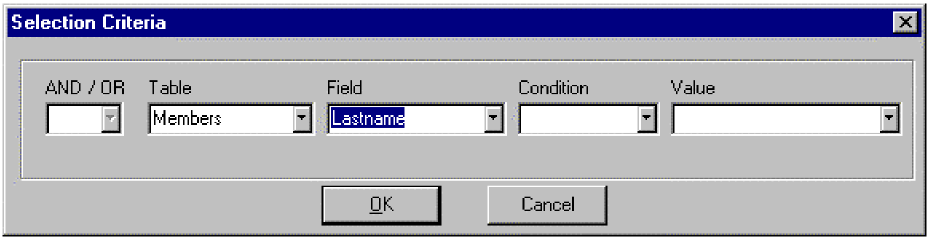
Members
Members and their Addresses
Members and their Classes
Members, the Cell they're a MEMBER of and their Cell Activities
Members, the Cell they're a LEADER of and their Cell Activities
Members, the Cell they're an INTERN of and their Cell Activities
Members, the Cell they're a SUPERVISOR of and their Cell Activities
Members and their Meetings/Counseling
Members and their Organizations
Members and their Profile Codes
Members and their Member Steps
Members and their Contributions
Members and their Pledges
Members and their Church Attendance

Which item you choose depends upon what information you want to select, or sort on. For example, if you want to view members that live in 'Memphis', you would need to select on the city field of the member's address. Therefore, you would choose Members and their Addresses.

Use the Description field to name the new view. For example: Birthdays for Month. When describing your views, try to choose a name that starts with a word or phrase that indicates the selection criteria. For example, instead of saying Members with a Birthday in Month, use Birthday for Month. This way you will be able to quickly find the views relating to Birthdays. When you have a long list of views, this will be very helpful.

Also, when naming views that select on the division fields, instead of using the division name of District or Zone, use the div name of Div1, or Div2, etc… Excellerate will automatically replace Div1 with District, or whatever the Division 1 name is. This way, if you change your cell structure, the views will reflect the new names.

The third question is answered by adding selection criteria. To select members that live in Memphis, hit the Add button in the Selection section. You will see the following Selection Criteria screen:



We want all members where their City equals Memphis. In the Table field, choose Addresses, for Field choose City, the Condition is '=' and the Value would be Memphis. That's it! Hit, OK, then OK again, and you will see a list of members that live in Memphis. Now, a better view would be to ask the user for the city, so that you wont have to have several views, one for each city. To do this, instead of specifying Memphis for the Value, use the '? Ask user for value' option in the Value field. Now anytime you use this view, it will first ask for what city you are interested in.

The answer to the last question is specified in much the same way. Choose Add in the Sort section, and specify the Table and field you want to sort by. You can also choose Ascending or Descending sort order.

You will notice, that as your are answering these questions, the SQL statement is being built in the SQL window at the bottom of the screen. This is for those who have experience with SQL, and want to see the details of the view. This SQL statement can also be modified to create an Advanced View. See Advanced Views later in this chapter.

Once you've built your view, and are satisfied with it, you can save it for future use. Just choose the Save current view button, and the view will be saved in the list of saved views. This view will now be available for you and other users to use at any time.

Editing a View

To modify a new view that you've just created, use the Edit current view button. This will bring up the same screen that you used to build the view. To modify an existing saved view, use the Edit saved view button. Any changes to a saved view will be seen by all other users as well. You may want to make temporary changes to a saved view, maybe for a quick report. To do this without affecting all other users, you would first use the saved view. Now that the view is your current view, you would edit it like a new view that you just created. If you decide to keep this view, you can change the description, and save it just as you would a new view.

To delete a saved view, use the Delete saved view button.

Importing, Exporting and Downloading Views from the Web

Since there could be a very wide variety of useful views that a church may desire, Excellerate allows you to import and export views to be exchanged with other churches, and to take advantage of new views offered through our web site. To export a view, you can either export the current view, or a saved view by choosing the appropriate export button.

When importing a view from a file, use the Import view button and select the filename to import. This view then becomes your current view. You must save it to make it available for other users, or to be able to choose it from the saved views in the future.

Views can be exchanged through our web site at www.msdweb.com. When downloading a view from the web site, remember where you save the file on your hard drive, because once it is downloaded, you will use the import view button to import it.

Advanced Views

Advanced views are views in which the SQL statement has been customized beyond the basic capabilities of the view builder. To create an advanced view, you can start with the basic view builder screen, then modify the SQL statement in the SQL window to meet your needs. You should have a pretty good understanding of SQL before attempting to create or edit advanced views.

For views to be able to prompt the user for a value in an expression, use the parameter notation :Pn where n is a value between 0 and 9. For example to select Members by MemberType, and have the view ask for MemberType, use the following SQL statement:

SELECT DISTINCTROW Members.* FROM Members WHERE **(Members.MemberType = :P0)**

The :P0 will actually get replaced by the value you are prompted for. There is one special parameter call the Attendees Parameter :PA. This parameter prompts the user for the number of attendees in a cell meeting. This value is usually compared to the Total field in the Cell Meetings Table for finding the cells with less than a certain number of attendees.

The following are some guidelines that must be followed when working with advanced views.

Always use uppercase letters for the SQL keywords. For example **SELECT, WHERE, ORDER**, etc…

Always place the ORDER clause at the end of the statement

Any expression containing a parameter must be enclosed in parentheses, and must have spaces around the operator for example:

> SELECT DISTINCTROW Members.* FROM Members INNER JOIN MemberSteps ON Members.MemberID=MemberSteps.MemberID
> WHERE **(MemberSteps.Step = :P1)** ORDER BY Members.Lastname;

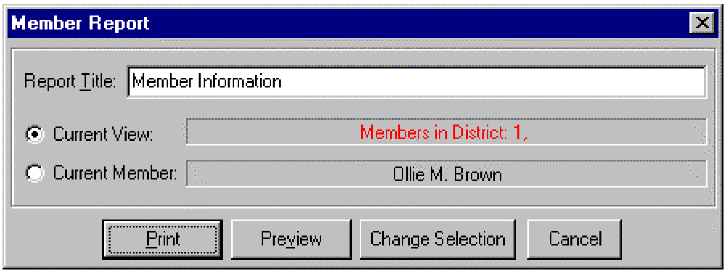
Remember Excellerate uses the Microsoft Access Jet Engine to process the SQL for the views, so a knowledge of Microsoft Access SQL will be helpful.

Chapter 11: Reporting

Reports and Views

One of the most important parts of any church management system is its reporting. Excellerate uses a combination of views and reports to produce the wide variety of reporting for a church. Many of the reports are based on the current view you have selected. For example, the Members list and labels report can be used for cell leaders, visitors, pastors, etc… Likewise, for a particular view, you could print a list, mailing labels or mail-merge with your word processor. This approach will provide many possible combinations of reporting.

The following is an example of the Member Info Report. Like many of the reports in Excellerate, you can report on either the current record, or the current view:



This screen is showing that our current view is ‘Members in District 1’. To print a detailed report for these members select the Current View choice, and hit Print. To print the report for the current member, select that option before printing. From this screen you can change the view for the report, by using the Change Selection button. This will allow you to pick a new view to use for this report.

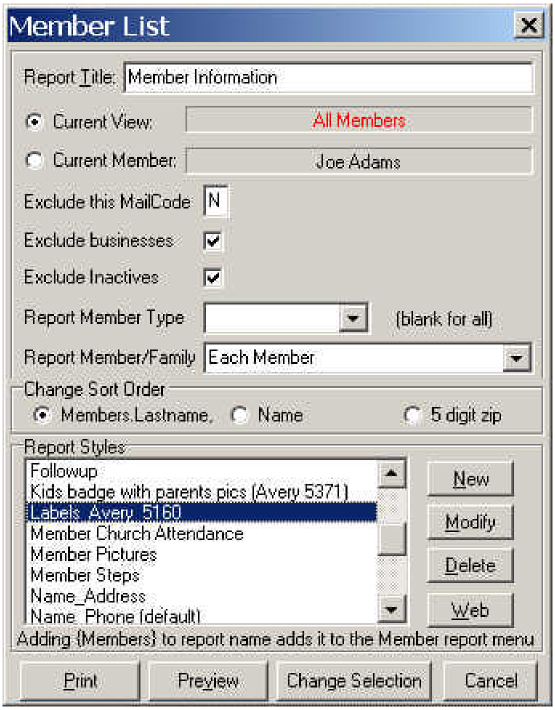
You may also Preview a report before printing it by using the Preview button.

Saving Reports

From the report preview screen, you can save the contents of a report to a text file for use in another program. Choose the save button, select Text files in the Save as type field, then type the name of the file to save the report to.

Report Styles

Another valuable feature of Excellerate's reporting is the ability to select different styles for many of the reports. This allows you to print in a variety of formats from labels, to lists, to letters. For example, in the Member Lists/Labels report, you will see some of the following styles:



These styles can be completely modified by the user to meet their needs. You can modify an existing style, and save it as a new style. You can also download new styles from our web site: www.msdweb.com. See the appendix for instructions on creating and modifying report styles.

Member Reports

Member Info Report

2/1/99 8:30:40 AM **New Life Cell Church** Page 1

Member Information

Abed **Cindy** **M** Family: **Abed, Cindy 13795** Envelope# **9237** MemberID: **9237**

Member Type:	**GSMA**	Occupation:	**Camera Operator**	Home#	**(123)456-7890**	User1	**0585502**
Pastor Type:		Employer:	**NCC Communications**	Work#	**(123)456-0988**	User2	
Mail Code	**N**	Student		Mobile#	**( ) -**	User3	
Sex:	**M**	Anniversary:	**12/15/1990**	Pager#	**( ) -**	User4	
First Visit:	**09/07/1993**	Birth:	**01/01/1960**	FAX#	**( ) -**		
Date joined:	**10/03/1993**	Age:	**39**			***Cell Group:***	
Relation	**Spouse**	EMAIL:				**1-A---**	

Home Address: 17700 North Blvd Apt 3
Baton Rouge, LA 70808-1148

Comment

District **1**
Zone **A**

Cell

Member Followup:

			Contacts:	Date:	Type:	Response:
Date of first visit:	09/07/1993		1:	09/09/1993	PhoneCall	More Info
Date joined:	10/03/1993		2:	09/12/1993	In Home Visit	Interested
How heard about:	Friend		3:			
Follow-up from:	Visitor		4:			
Follow-up sponsor:	Katie	Odom				
Cell sponsor:	Cindy L.	Brown				

Family Members:

Spouse: Cindy Abed

Profiles:

Jason Sarver
Pastoral Care Update '98
Kitchen Interest
Clerical Interest
Community Outreach Interest
Music Interest

Member Development Steps:

01/06/98	Completed	Water Baptism
03/11/98	Completed	Christianity 101
05/22/98	Completed	Encounter Retreat
08/11/98		Discipleship 201
11/28/98		Discovery Seminar
01/14/99		Leadership 301
03/29/99		Champions Retreat

Organizations:

10/01/95	Choir	Alto
10/14/97	Prayer Shield	Prayer partner

Visits / Counselings:

10/17/98	Hospital	Broken Arm	In-field	Teddy Long
10/15/98	Counsel	Ministry	Church	Teddy Long

Clasess:

08/04/97	Discipleship 201	1	Building Foundation	Yes
08/11/97	Discipleship 201	2	Pray Effectively	Yes
08/18/97	Discipleship 201	3	Studying the Word	Yes

The Member Info Report produces a detailed member report, including all associated info tabs such as family members, profiles, cell groups, etc…

Member List/Labels

The Member List/Labels report is a report with different styles. With this report you can print a member list of names and addresses, mailing labels, etc… This report also allows you to exclude certain members from mail-outs. If you indicated that certain members should not receive mailings by setting their Mail Code to 'N', or some other value of your choice, you can specify not to report for that mail code here. Just specify the code to exclude from the report. If you are printing mailing labels for your members, and you don't want to send the same mail-out to the husband, wife, and children of a family, you can choose one of the family options for your report. By choosing one of the family options, only one label per family will be printed. The way the label is addressed depends on the family option you choose. For example, you could choose Family – Mr. and Mrs. Last name, or The Lastname Family, etc…

Member Development Report

The Member Development Report shows your members' progress through the Member Steps, and Classes. It is useful in seeing how far along they've come in their development process. This report can be printed for the current member, or the current view of members.

Member Counseling/Meetings Report

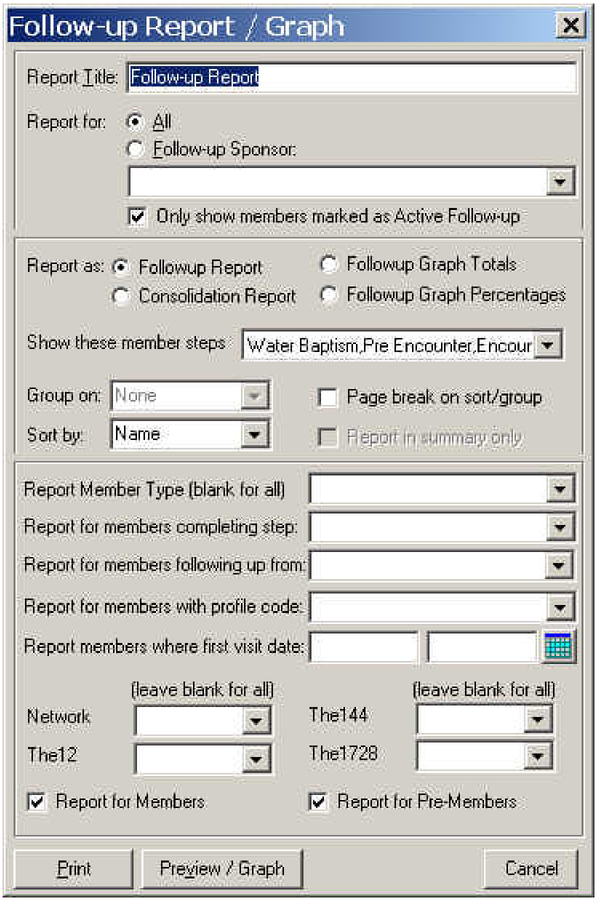
The Member Counseling/Meetings Report lists details of your members' counseling sessions or meetings. These could be prior, or future meetings. You can specify a specific counselor if desired, and the meeting date range to print. This report uses report styles which can be modified to suit your needs.

Counselor's Report

This report is very similar to the Member Counseling/Meetings Report, except that the member report is grouped by member, and this report is grouped by counselor. This is helpful for a senior pastor to review the meetings of his counselors. Again, this report can be modified.

Follow-up or Consolidation Report / Graph

The Follow-up Report or Consolidation Report (a G12 term) is a powerful report used for following up on new visitors and converts, as well as analyzing the success of your follow-up ministry.



As you can see there are many options on this report which allow it to perform a wide range of functions from listing the follow-up information for a particular sponsor, to analyzing the overall follow-up success.

To print a simple follow-up list, you can choose to report for all sponsors, or for a particular sponsor. In the Report as field, choose "Followup Report" option. You can further refine the report using the other report options.

12/29/03 1:31:22 PM

New Life Cell Church

Follow-up Report

Active Followup Members and PreMembers

Page 1

Member:	Adams	Joe	Cell: 1-A-1-A	Member	Follow-up	Contacts	Date	Type	Response
Phone: (222)222-2222	WorkPhone:(222)111-1111		District 1	Date first visit:	01/01/96 Date joined: 02/01/96	1:	01/02/96	HomeVisit	Interested
Address: 11212 Dogwood Ln.			Zone A	How heard about:	Advertisement	2:			
			Section 1	Follow-up from:	Info card	3:			
Cordova	TN	38018		Follow-up sponsor:	Pete Maxwell	4:			
E-Mail: www.hometime.org				DecisionType:					

Joe is interested in starting an outreach group to help people make small repairs to their houses.

Member Steps:			Completed
01/01/1996	1	Water Baptism	**Completed**
02/01/1996	2	Christianity 101	**Completed**
03/01/1996	3	Encounter Retreat	**Completed**
02/16/1999	4	Discipleship 201	
	5	Discovery Seminar	
	6	Leadership 301	
	7	Champions Retreat	

Classes:				Attended
01/16/1999	Discipleship 101	1	Building Foundation	**Attended**
01/23/1999	Discipleship 101	2	Pray Effectively	**Attended**
02/16/1999	Discipleship 101	3	Studying the Word	**Attended**
03/16/1999	Discipleship 101	4	Walking in Faith	
04/16/1999	Discipleship 101	5	Overcoming the Enemy	
05/16/1999	Discipleship 101	6	Releasing Hurts	
02/01/1996	Christianity 101	1	Christianity	**Attended**

To print a Consolidation report, which is basically the same information, but in a tabular format so that you can total the contacts, and member steps at the bottom to analyze your success.

12/29/03 1:41:04 PM

New Life Cell Church

Consolidation Report

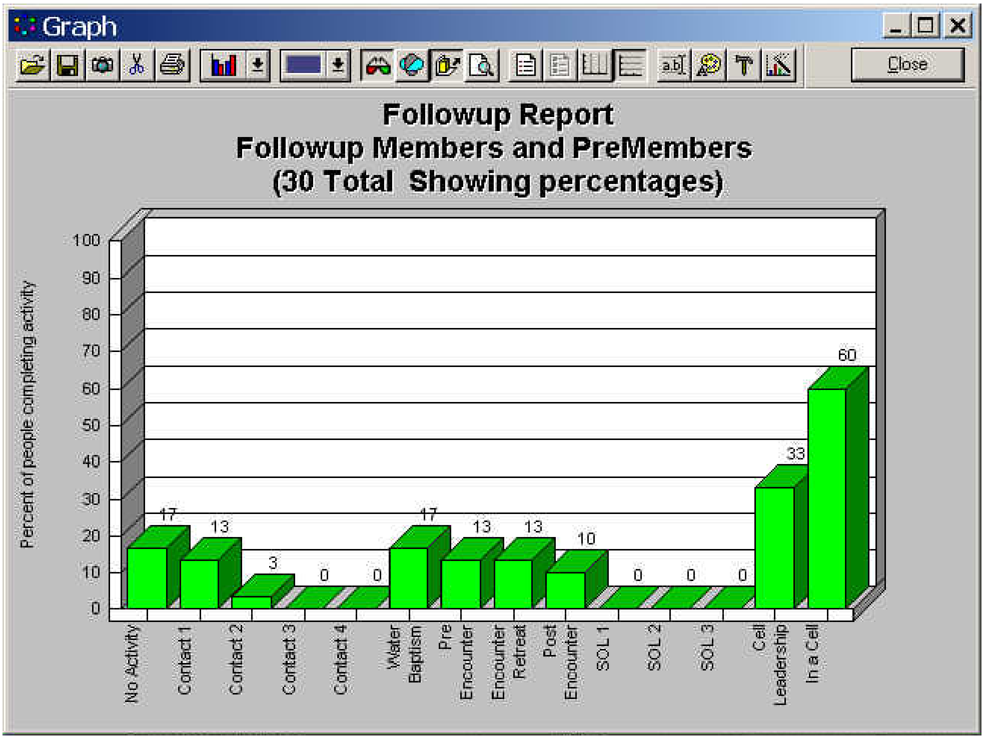
Followup Members and PreMembers 01/01/1997-12/31/2003

Page 1

Name/Phone/Email	Sponsor	Follow up	Contacts				Water	Pre	Encounter	Post	SOL 1	SOL 2	SOL 3
Jacobs, Eddy	Kieth Neal (111)254-8789	12/30/98 Alter	WorkVisit 01/01/99 More Info	HomeVisit 02/01/99 Interested									
Long, Missy	Terry Landry (111)369-8569	01/01/99 Visitor	HomeVisit 01/02/99 More Info										
West, Adam	Joe Adams (222)222-2222	02/02/99 Info card	Phone 02/03/99 Interested										
		Totals:	3	1	0	0	0	0	0	0	0	0	0
People reported: 3		Percentages:	100%	33%	0%	0%	0%	0%	0%	0%	0%	0%	0%

This format shows the totals as well as the percentages, so you can easily see what kind of success you are having in the different areas. This same report can be grouped in a summary report by a division for a higher level of analysis.

The same information can also be graphed by choosing the Followup Graph format:



Visitor Report

The Visitor Report allows you to print a lists of visitors from both the member and pre-member module. This report allows you to select certain types of visitors, such as those who you wish to follow-up on from an information card, alter visit, etc… This report can also be limited to a specific date range, as well as a district, zone, etc…

Church Attendance Chart

The Church Attendance Chart prints a chart showing the members and their church attendance history in a chart to easily spot attendance trends. You can run this report for a specific view of your members, and for any date range of up to approximately six months.

12/19/99 6:29:23 PM

Page 1

New Life Cell Church

Church Attendance Chart

All Members

Member	*Meetings:*	Wk49 11/29	Wk50 12/06	Wk51 12/13	Wk52 12/20	Wk1 12/27
Joe	Adams	X	X	X	X	
Mary	Adams		X		X	
Tina	Adams	X		X		
Tommy	Adams		X	X		
Peter	Johnson	X			X	
Adam	Jones		X	X	X	
Jimmy	Landry	X		X	X	
Terry	Landry			X	X	
Theresa	Landry	X	X		X	
Kristi	Maxwell		X	X		

Cell Reports

Cell Info Report

2/1/99 8:26:17 AM

New Life Cell Church

Cell Information

Page 1

1-A-1-- Type: **Family** Leader: **Cindy Abed**

Started:	**03/01/1998**	Intern1	**Judy Zito**	District	**1**	Emphasis	**Outreach**
To Multiply:	**11/01/1998**	Intern2		Zone	**A**	Old #	**1A-1A**
Meets On:	**Tuesdays**	Intern3			**1**	MeetArea	**1**
Time:	**7:00pm**	Supervisor				Childcare	**Yes**
Frequency:	**Weekly**			Cell			

Primary Meeting Phone: **(123)456-7890** 'Organizational' Parent Cell: **1-A---** Generation: 3

Primary Meeting Address: **Baker/Zachary** 'Birth' Parent Cell: Generation: 0

Cell Members:

Member	Carruth, Yaney	(225)529-5120	10/23/98
Member	Corona, Tammy M.	(123)456-7890	06/30/98
Member	Cox, Anita	(123)456-7890	06/30/98
Member	Dossey, Beth	(225)775-5995	10/15/98
Member	Dossey, Mary	(225)775-5995	10/14/98
Member	Faust, Thomas	(123)456-7890	06/30/98
Member	Fleming, Jewell	(225)554-4005	10/14/98
Member	Haddox, David Wayne	(123)456-7890	06/30/98

The Cell Info Report, like the Member Info Report shows detailed information for a cell group, or a list of cell groups in the current view. The following associated info tabs will also appear on this report:

-Cell Members
-Cell Activities
-Member Change History
-Cell History

Cell List Report

The Cell List Report is another report that uses different styles to produce a wide variety of printouts. You can choose a view that shows just the cell groups, or the cells with their members, or activities, etc… This report also can be printed for any cell view, or for just one cell.

Cell Leader Form

The Cell Leader Form is the form you print out each week for your cell leaders. This form provides the leader with a list of members, their phone numbers, a place to check off if they've contacted them or not, etc… This report can also remind your leaders of upcoming cell activities, and member's birthdays! This is another report that uses styles, which can be modified by the user to meet the cell group reporting needs of your church.

New Life Cell Church

Cell Leader Report Form

Cell Leader:

Cindy Abed

Cell Type Family
District Brandon Ellis
Zone Grant. S Samuel

Cell: 1-A-1--

Meeting Date

Sun Mon Tue Wed Thur Fri Sat
(Circle one)

For week ending 1/9/1999

* *Missionary Pray for Kevin Graves. * 1/14/99 1:00:00 PM Nursing Home SouthHaven Retirement Ctr..*

Indicate any of the following below: Intern1 Intern2 Intern3 **Do not include the cell leader in totals.**

Member Name	Phone#	Contacted	Attended	List new Members or Visitors (mark NM or V)
Carruth, Yaney	(225)529-5120	☐	☐	
Corona, Tammy M.	(123)456-7890	☐	☐	
Cox, Anita	(123)456-7890	☐	☐	
Dossey, Beth	(225)775-5995	☐	☐	
Dossey, Mary	(225)775-5995	☐	☐	
Faust, Thomas	(123)456-7890	☐	☐	
Fleming, Jewell	(225)554-4005	☐	☐	
Haddox, David Wayne	(123)456-7890	☐	☐	
Maggio, Steven Keith	(123)456-7890	☐	☐	
Pace, Walter AlSam	(225)573-4271	☐	☐	
Smith, Linda	(225)775-2440	☐	☐	
Zimmerman, Wilmot	(123)456-7890	☐	☐	
Zito, Judy	(225)557-9102	☐	☐	

TOTALS	Salvations	Children	Members	Visitors	Total Present
	HGB	WB			

Evaluations, Testimonies, Problems:

NEXT WEEK MEETING INFO: Day - Sun Mon Tue Wed Thur Fri Sat (circle one)

Location:

Date
Time
Phone #

Another style of the cell leader report listing the member steps is useful for consolidation in the G12 model:

New Life Cell Church

Cell Leader Report Form

Cell Leader:

Pete Maxwell

Cell: Men---

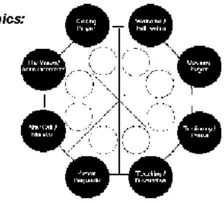
Cell Type	Leaders(12)
Network	Pete Maxwell
The 12	
The 144	
The 1728	

Meeting Date

Sun Mon Tue Wed Thur Fri Sat

(Circle one)

Dynamics:



In the empty circles above, record how many minutes each activity took to complete.

Member Name	**Phone#**	**Attended / Contacted**	**Water Baptism**	**Pre-Enctr**	**Encounter**	**Post-Enctr**	**S.O.L** Level 1	**S.O.L.** Level 2	**ReEnctr**	**S.O.L** Level 3	**Leader** Of Cell
Adams, Joe	(222)222-2222	☐ ☐	X 01/01/96	X 02/01/96	X 03/01/96						Men-01-
Johnson, Peter	(555)555-5555	☐ ☐									Men-01-
Jones, Adam	(111)589-7893	☐ ☐									Men-05-
Landry, Jimmy	(222)222-2222	☐ ☐									
Landry, Terry	(111)369-8569	☐ ☐									Men-02-
Neal, Kieth	(111)254-8789	☐ ☐									
Phillips, Joseph	(111)458-6987	☐ ☐									Men-06-
Taylor, Bob	(111)379-8458	☐ ☐									Children
Williams, Mike	(111)587-4598	☐ ☐	X	X	X	X 12/29/03					Men-04-

TO ADD NEW MEMBERS - PLEASE COMPLETE ALL INFORMATION BELOW:		
Mark one: ☐ Salvation ☐ Water baptized ☐ New Member	Mark one: ☐ Salvation ☐ Water baptized ☐ New Member	
Full name:	Full name:	
Addr:	Addr:	
City: State: Zip:	City: State: Zip:	
Phone#: Date of Birth:	Phone#: Date of Birth:	
Marital Status: Sex: M / F Receive Mail: Y / N	Marital Status: Sex: M / F Receive Mail: Y / N	

TOTALS			
Members	☐	Children	☐
Visitors	☐		
Total Present	☐	Prayer3	☐
		Salvations	☐

Other styles are available at our web site: www.msdweb.com.

Cell Meeting Report by Division

12/31/98 10:13:34 AM — **New Life Cell Church** — Page 1

Cell Meetings Summary Report

District=1 : 09/27/98 - 10/03/98

Cell	Leader	Cell Type	NoMt NoRp	* Members	* Visitors	Children	Salvation	HGB	WB		* Total
District 1	Brandon Ellis										
Zone **SubTotals**	**Cells: 1** **Mtgs: 1**	Cells not reported: Cells did not meet:	0 0	**7**	**0**	0	0	0	0	0	**7**
Zone A **SubTotals**	**Cells: 13** **Mtgs: 13**	Cells not reported: Cells did not meet:	0 0	**94**	**14**	34	0	0	0	0	**108**
Zone B **SubTotals**	**Cells: 13** **Mtgs: 11**	Cells not reported: Cells did not meet:	0 2	**55**	**18**	25	0	0	1	0	**73**
Zone C **SubTotals**	**Cells: 14** **Mtgs: 14**	Cells not reported: Cells did not meet:	0 0	**97**	**16**	35	0	0	0	0	**113**
Zone D **SubTotals**	**Cells: 20** **Mtgs: 17**	Cells not reported: Cells did not meet:	0 3	**92**	**1**	10	0	0	0	0	**93**
District 1 **SubTotals**	**Cells: 61** **Mtgs: 56**	Cells not reported: Cells did not meet:	0 5	**345**	**49**	104	0	0	1	0	**394**
Totals	**Cells: 61** **Mtgs: 56**	Cells not reported: Cells did not meet:	**0** **5**	**345** *	**49** *	**104**	**0**	**0**	**1**	**0**	**394** *

The Cell Meeting Report by Division gives you a weekly report of the attendance in your cells. This report can be configured to show each cell's meeting totals, or a summary like this for each District, Zone, or whatever division names you use.

Cell Meeting Report by Date

2/1/99 9:25:44 AM — **New Life Cell Church** — Page 1

Cell Meeting Report by Date

District=1 Zone=A : 09/01/1998 - 10/31/1998

Date	#Cells	#Mtgs	Avg # of Members	Avg # of Visitors	Avg # of Children	Total # of Salvations	Total # of HGB	Total # of WB	Total # of	Total
September 1998	15	39	6	0	2	0	0	0	0	273
October 1998	15	32	7	1	2	1	0	0	0	288
Total		71	6	1	2	1	0	0	0	561

Parameters: by Month and Div1='1' and Div2='A'

The Cell Meeting Report by Date provides a breakdown by Month or Year of your cell growth. This report lets you look over a period of time to see if, and where your cells are growing, if attendance is increasing, etc…

Cell Member Attendance Chart

The Cell Member Attendance Chart can chart cell member attendance to easily observe their faithfulness, or look for signs of continued absence. This can be reported by date range for up to 20 weeks of history. You can also report for specific districts, zones, etc…

12/19/99 5:24:07 PM Page 1

New Life Cell Church

Cell Member Attendance Chart

All Cells: 12/01/1999 - 12/31/1999

---**Pastor's Cell** Leader:**Pete Maxwell** Phone:**(123)456-7890** *(X-Attended meeting NM-No meeting NR=NoReport)*

Cell Members	*Meetings:*	12/01	12/07	12/13	12/20
Tina	Adams	X	X	X	NM
Joe	Adams	X		X	NM
Adam	Jones	X	X	X	NM
Kieth	Neal		X	X	NM
Joseph	Phillips	X	X	X	NM
Erin	Rushing	X	X	X	NM
Bob	Taylor	X	X	X	NM

Members Who Missed Cell Meetings

The Members Who Missed Cell Meetings report allows you to list those members who have missed a certain number of consecutive cell meetings. This is a tool to quickly spot members to follow-up on.

Missing Cell Report List

The Missing Cell Report List provides a list of cells who have not yet turned in their cell leader report form. These are the forms that are used to report the attendance in your cells. This report is a handy way to follow-up with these leaders.

Cell Tree Diagram

See Cell Tree Diagram in the chapter on Cells.

Cell Growth Graph

See Cell Growth Graph in the chapter on Cells.

Class Reports

Class List Report

The Class List Report is a generic report for your classes, sessions, and attendance. This report uses different styles to produce the information you need. Again, you can modify these styles to show different items in the report.

Class Members Report (for traditional classes)

The Class Members Report allows you to report on members who have either already taken a class, or are scheduled to take a class. This report can be used to print out a roster to record attendance. The option in this report allow you to print for your current class view or a specific class, and which sessions to report. You may also specify a date range for reporting on previous attendance.

G12 Class Reports:

Several class reports are available for Post-Encounter / School of Leaders classes. Many of them are available in the Member module as a Member List / Label style including: SOL Attendance, SOL Class Roster, SOL Sign-in sheet with barcode, and SOL Student info. These report styles work with the current view, so you would first choose one of the SOL views such as: SOL Active Students, SOL Potential Leaders, SOL Graduated in date range, etc…

For statistical reporting you could use the Post-Encounter or SOL Statistics report in the Class module. This report actually produces five different report types that can be further customized to produce many different reports. The main report types are:

Men & Women Stats
Enrollment
Potential Leaders
Students Matriculated
Attendance Trends

Within these reports you can further choose how you would like to group and subtotal. So, if you wanted to see a report showing the number of Men and Women in each Level, but separated by Network, you could select Men/Women for your columns, Net for the Outer grouping, and Level for the inner grouping. The most common layouts are already selected for you by default.

Here is an example of Men & Women Statistics:

01/14/03 11:23:30 AM **School of Leaders Statistics** Page 1

Men & Women Stats (Active Schools)

Net:Men	Men		Women		Unknown				Total
Level 1	37	95%	0	0%	2	5%			39
Level 2	45	96%	1	2%	1	2%			47
Level 3	49	94%	0	0%	3	6%			52
Total	131	95%	1	1%	6	4%			138

Net:Women	Men		Women		Unknown				Total
Level 1	2	5%	38	90%	2	5%			42
Level 2	1	1%	127	91%	11	8%			139
Level 3	1	1%	148	93%	10	6%			159
Total	4	1%	313	92%	23	7%			340

Organization Reports

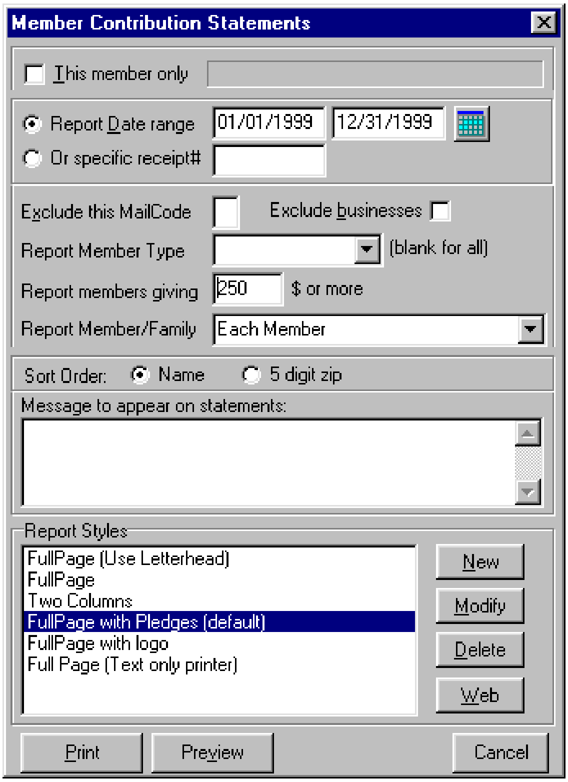
Organizations List Report

The Organizations List Report is also a generic report for your organizations that can use several different report styles to produce the information you need. The default style is a contact list of members of the organizations, and their phone numbers.

Contribution Reports

Member Contribution Statements

One of the main purposes for tracking contributions is to be able to print the required Member Contribution Statements at the end of the year. These statements can actually be printed at any time, and can be modified because they use report styles. There are several default styles including single column contributions, two-column contributions, contributions and pledges, text only versions, etc… Other styles will be available from our web site: www.msdweb.com

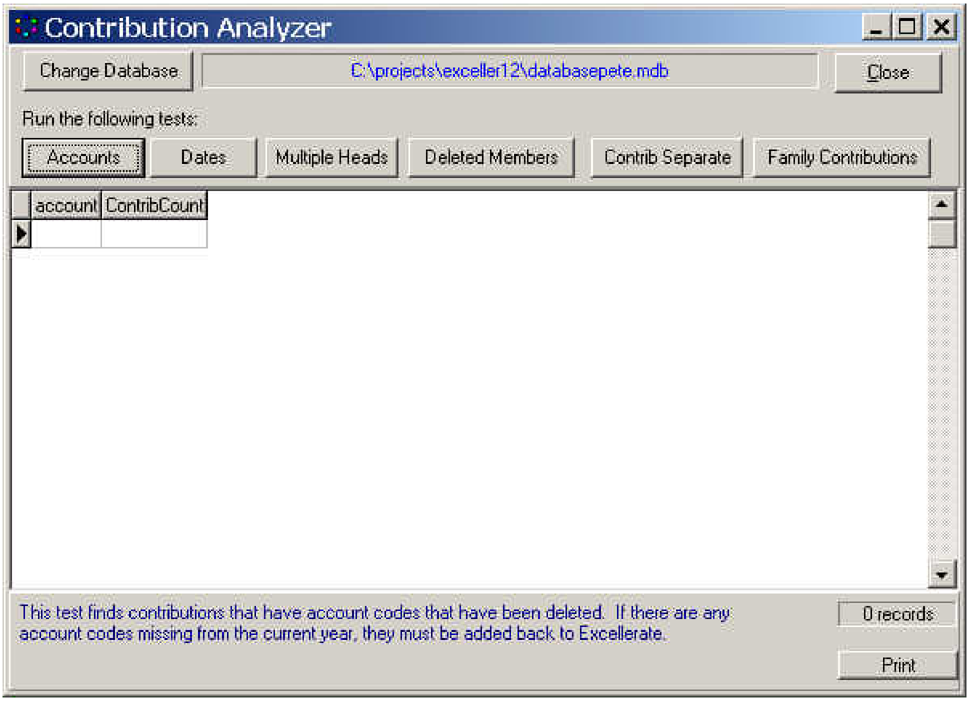


As you can see, you can choose the date range to report on, or you can generate a receipt by reporting for a specific contribution. As with other member reports, you can choose to exclude certain members based on the mail code. If you want the member contributions reported to the whole family, you would choose one of the family reporting options instead of individual members.

If there are certain family members that you wish to receive their statement separately from their family, you can indicate that in the member's edit screen under the contribution tab.

If you selected the Canadian option in contribution preferences, and choose the Canadian report style, Excellerate will provide functionality to generate receipt numbers on your contribution statements. These receipt numbers will be stored in the member's change history, and once the statements have printed correctly, those contributions are protected from generating a new receipt number. This is done by setting the 'Date last contribution statements printed' field in the contribution options screen. Those statements can be re-printed with the original receipt number by choosing the re-print report style.

There are many data entry factors that determine the output of a contribution statement. Therefore, Excellerate will suggest that it runs an analysis on your existing contributions to check for any data entry problems.



You can run each of the test to check for different situations which may affect your statements. If problems are found, the utility can fix them, or will suggest how you can fix them yourself.

Here is an example of a member contribution statement:

New Life Cell Church

1100 Germantown Rd
Cordova, TN 38018

Joe Adams
11212 Dogwood Ln.
Cordova , TN 38018

Date: 12/19/99
Member ID: 6
Contributions for 01/01/1999 - 12/31/1999

Date	Amount	Description	Check/Type	Description
02/24/1999	$200.00	General Fund	124	
02/24/1999	$200.00	Missions	124	
02/10/1999	$25.43	General Fund	Check	
02/03/1999	$94.25	General Fund	Check	

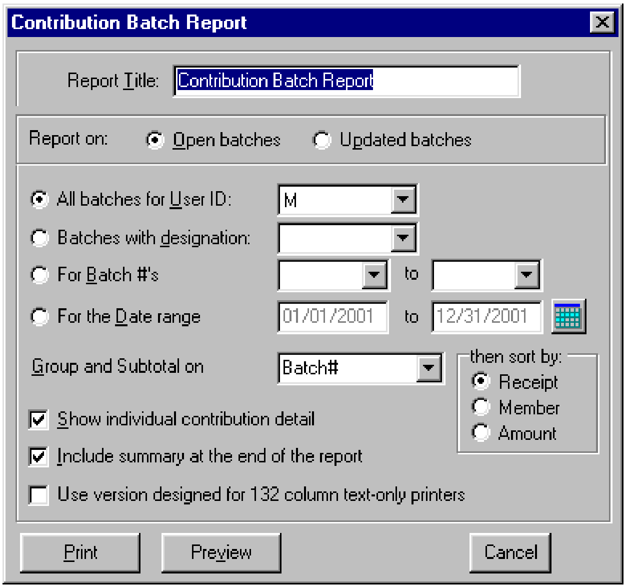
Total tax-deductable contributions for this period: $519.68

Account Summary

General Fund	319.68
Missions	200.00

Contribution Batch Report

The contribution batch report can be printed at any time. This report lists each contribution for the batch and can be grouped and subtotaled in many different ways.



Here is an example of the contribution batch report:

12/19/99 11:55:51 PM — Page 1

New Life Cell Church

Contribution Batch Report

User:MANAGER

Date	Batch	MemberID	Envelope	Receipt	Account	Amount	Type/Check#	Deductible	Member Name
02/03/1999	1	15		0	General Fund	$150.00	Check	Y	Kieth Neal
02/03/1999	1	6		1	General Fund	$94.25	Check	Y	Joe Adams
02/03/1999	1	0		2	General Fund	$78.00	Cash	Y	(Loose cash)
02/03/1999	1	28		3	Missions	$45.24	Check	Y	Katy White
02/03/1999	1	24		4	General Fund	$92.00	Check	Y	Kathy Smith

Batch 1 SubTotal Hash Total: **0** Batch Total: **$459.49** Contributions: 5
Calculated Hash Total: **0** Calculated Batch Total: **$459.49**
Difference: **0** Difference: **0.00**

Date	Batch	MemberID	Envelope	Receipt	Account	Amount	Type/Check#	Deductible	Member Name
02/10/1999	2	28		5	General Fund	$250.01	Check	Y	Katy White
02/10/1999	2	6		6	General Fund	$25.43	Check	Y	Joe Adams
02/10/1999	2	24		7	General Fund	$78.39	Check	Y	Kathy Smith
02/10/1999	2	15		8	General Fund	$250.00	1343	Y	Kieth Neal
02/10/1999	2	23		9	General Fund	$25.00	Cash	Y	Kerri Smith
02/10/1999	2	7		10	Missions	$52.11	3223	Y	Peter Johnson
02/10/1999	2	7		10	General Fund	$144.90	3223	Y	Peter Johnson

Batch 2 SubTotal Hash Total: **0** Batch Total: **$825.84** Contributions: 7
Calculated Hash Total: **0** Calculated Batch Total: **$825.84**
Difference: **0** Difference: **0.00**

Contribution Graph

The contribution graph will graph contribution income and pledges for each of the accounts. These can be grouped by week, month, quarter, or year.

Member Contribution Report

The Member Contribution Report can be used to report on a specific view of your members. You may want to see how much members in a certain zip-code are contributing, or compare different age groups, etc… This report also allows you to compare a member's pledged giving with their actual giving.

Member Contribution Chart

The member contribution chart allows you to see your member's giving history over a whole year

12/20/99 12:05:29 AM | **New Life Cell Church** | Page 1

Member Contribution Chart

All Members (01/01/1999-12/31/1999)

Name	Total	12/99	11/99	10/99	09/99	08/99	07/99	06/99	05/99	04/99	03/99	02/99	01/99
Joe Adams	520	0	0	520	0	0	0	0	0	0	0	0	0
Mary Adams	1123	0	0	1123	0	0	0	0	0	0	0	0	0

Top Contributor Report

This report will allow you to report givers who contributed over a certain amount for any date range. The list of givers will be sorted by giving amount, and can be run for a specific account.

Pledge Report and Pledge Projection Report

The Pledge report lists member pledges, and the Pledge Projection Report projects income based on member pledges.

Member Pledge Report

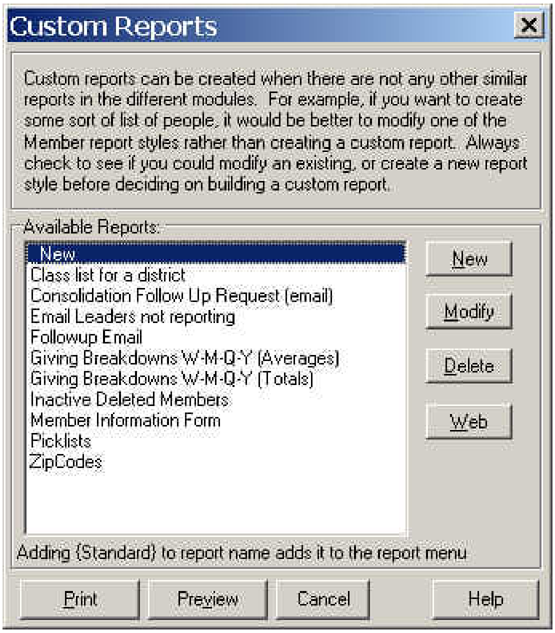
The Member Pledge Report lists members, how much they pledged, how much the contributed toward the pledge, and what their pledge balance is. This can be run for a specific view of members, and for a specific account or all accounts.

Member Pledge Statements

Member Pledge Statements is very similar to Contribution Statements, except that it will print a statement for anyone who has pledged even if they have not contributed. The statements use different report styles from statements, to letters, and can show the balance due for that pledge.

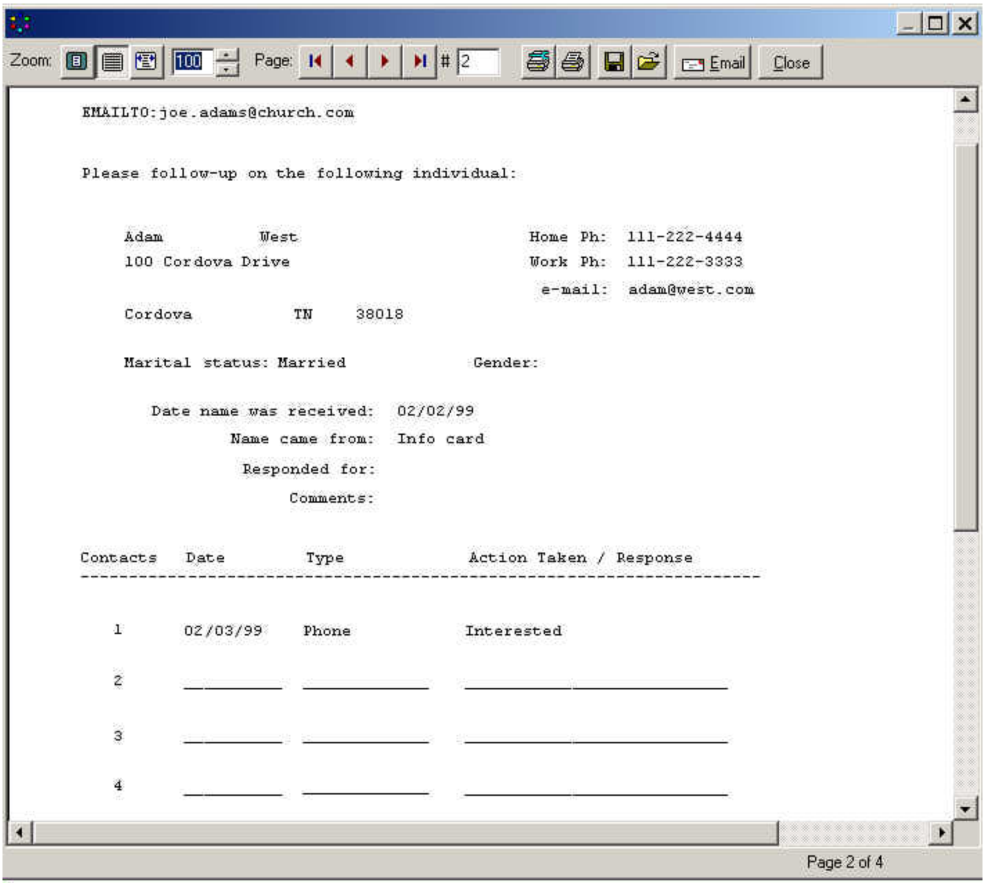
Custom Reports

A custom report is a customizable report that is not constrained to any particular module or report type. These reports are similar to report styles, except that report styles are limited to the type of report they belong to such as a contribution statement, or member list. Custom reports can report on almost any part of the database, such as picklists, zip codes, members and pre-members combined. This is actually done by building a view and a style, and saving them in a custom report.



Custom reports can be created when there are not any other similar reports in the different modules. For example, if you want to create some sort of list of people, it would be better to modify one of the Member report styles rather than creating a custom report. Always check to see if you could modify an existing, or create a new **report style** before deciding on building a custom report.

The Follow-up Email custom report is an example of how a custom report can report on a wider range of information. In this example, it is reporting on both members and pre-members combined, and then emailing the information to follow-up sponsors.



EMAILTO:joe.adams@church.com

Please follow-up on the following individual:

Adam West
100 Cordova Drive
Home Ph: 111-222-4444
Work Ph: 111-222-3333
e-mail: adam@west.com

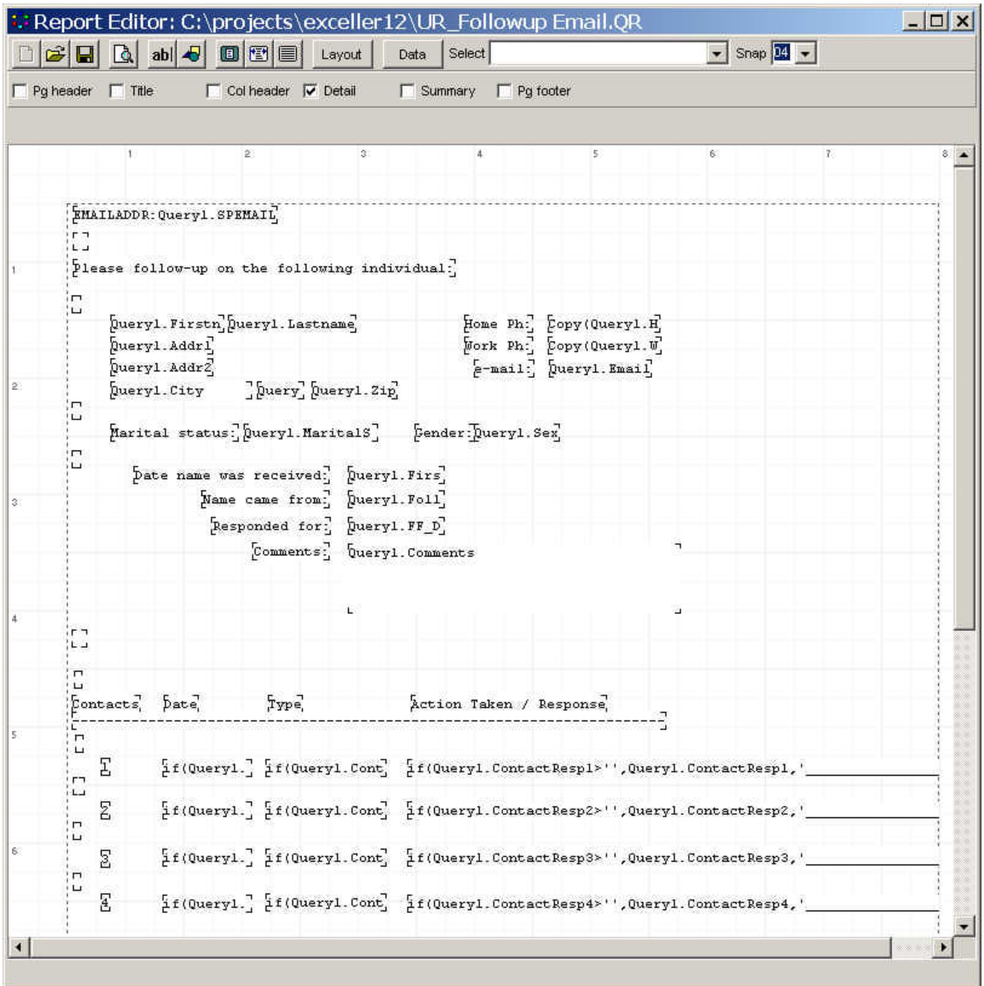
Cordova TN 38018

Marital status: Married
Gender:

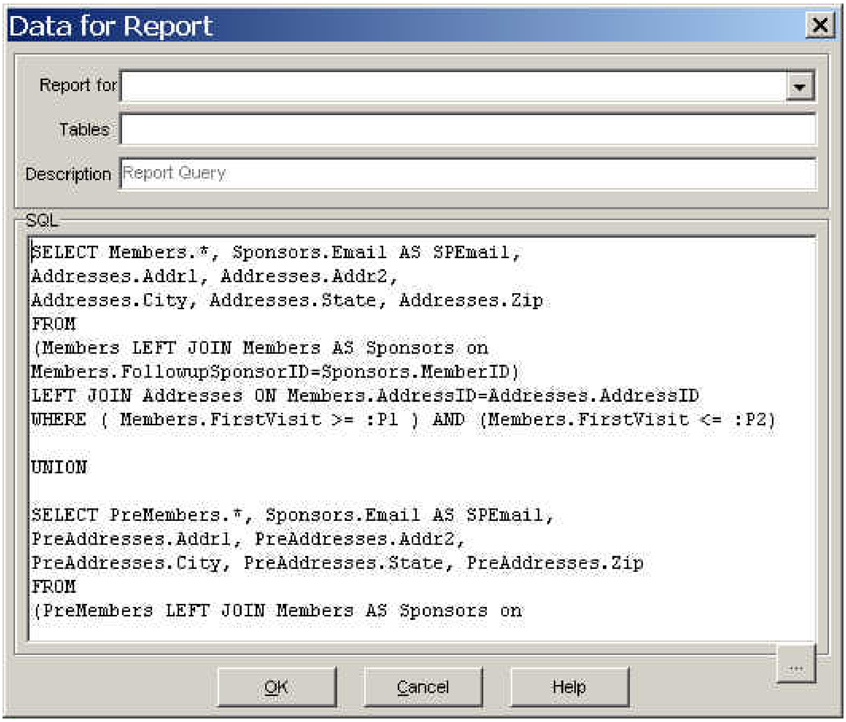
Date name was received: 02/02/99
Name came from: Info card
Responded for:
Comments:

Contacts	Date	Type	Action Taken / Response
1	02/03/99	Phone	Interested
2	________	__________	_____________________
3	________	__________	_____________________
4	________	__________	_____________________

If we hit the Modify button, we can see the layout of the report:



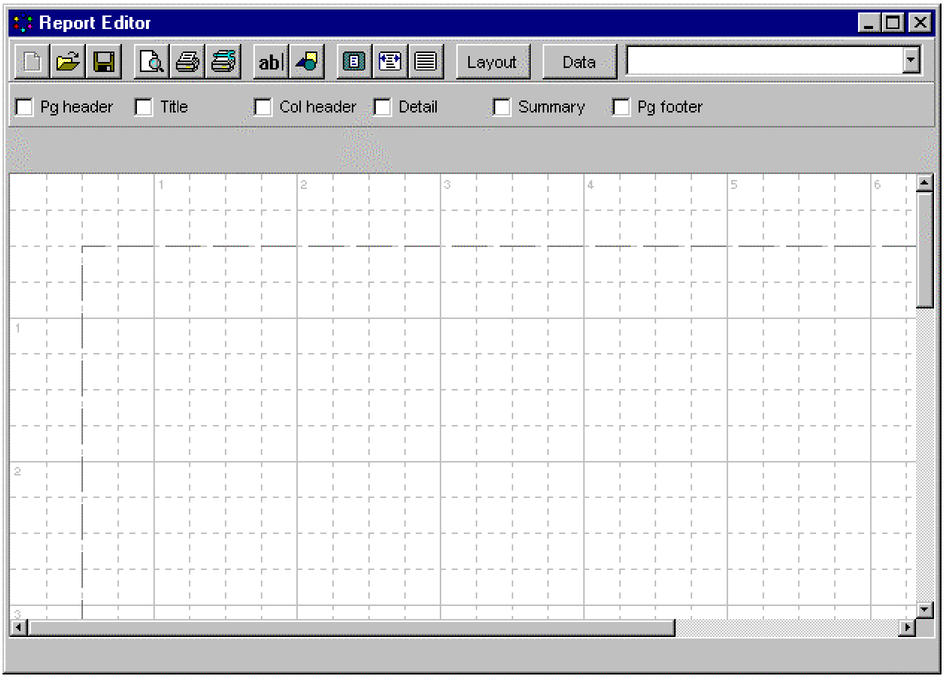
You will see the labels and data fields that make up the report above. Hit the Data button to see the data that drives the report:



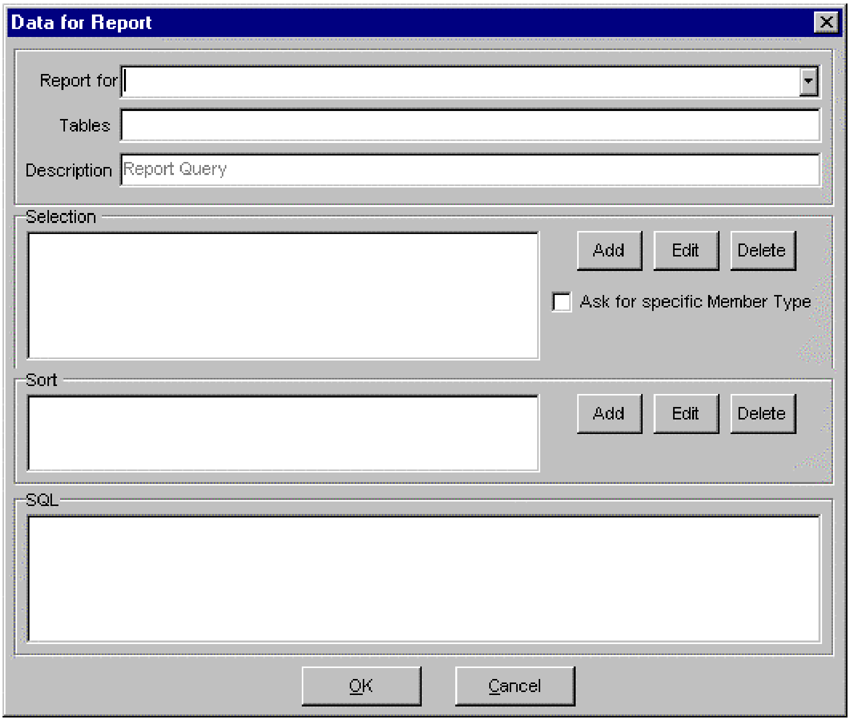
The data is basically an Excellerate view, or in this case an advanced view, which is actually an SQL statement. Most reports will not need an advanced SQL statement, and can be built using the view builder.

Creating a Custom Report

To create a custom report, choose the New button. You will then see the report editor screen:



The only difference between the report editor for report styles, and custom reports is the Data button. This button allows you to select the data to be used in the report:



You will notice this screen looks very much like the build view screen. Basically you are doing the same thing, that is, building an SQL statement to produce the data necessary for the report. You can still use prompts to ask the user for certain values in selecting your data just as in a view. The report data criteria you build here gets saved with your custom report.

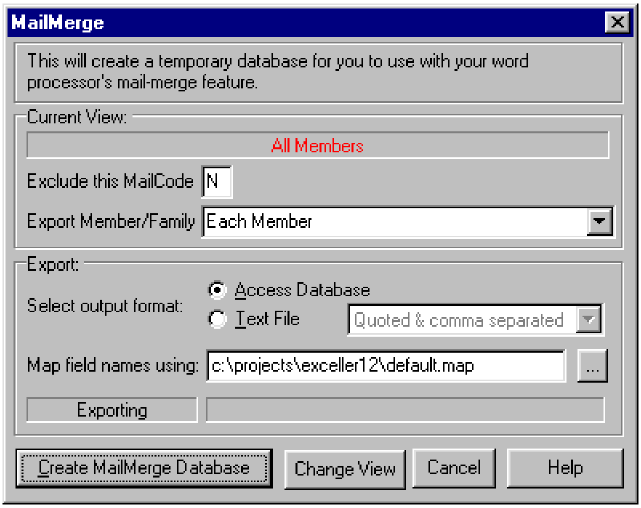
Remember, these reports can be exchanged with other churches, so visit our web site to exchange custom reports.

See the chapter on Views for more information on selecting data.

See Report Styles in the appendix for more information about designing the report content.

Mail Merge

Excellerate allows you to easily create mail-merges with your word processor. Basically, Excellerate will export your current view to a text file or access database. This file is then used by your word processor to merge with a document. When you select Mail Merge under the reports menu, you see a screen similar to the following:



Since we are in the Member module, we have the choice of excluding certain mail codes, and we could limit the records to one per family instead of each family member.

You can also choose what format to export the data. Access format would probably be preferable, but some older word processors may not recognize that format. In that case, use the text format.

When you hit Create Mail Merge Database, Excellerate will ask you for a filename, then export your view to that file. If you setup the path to your word processor in the program options screen, your word processor can automatically be loaded for you. See your word processor documentation on how to create a mail merge document, but make sure you choose the file that you just created from excellerate for your data source.

Chapter 12: G12 Specifics

There are several aspects of the G12 model that have been specifically designed into Excellerate to help you be more effective at administering the G12 vision. That functionality will be described here in relation to "The Ladder of Success" – Win, Consolidate, Disciple, Send.

Win - The Prayer for three

The prayer for three is where members of a cell group are praying for three individuals each. You need to decide how much data you want to collect at this stage. For the most part, these individuals may not have any interaction with the church yet, and may not even need to be tracked in the database. However, measuring success in this area is still important, so there are two options to consider:

- Cell leaders report the names of these individuals in the comments section of their weekly cell meeting reports. This can be reviewed by their own leaders, or by the church staff.

- Cell leaders report just the number of people they are praying for in the cell meeting reports. These numbers can be reported and graphed in the cell meeting reports or graphs.

Consolidate – Keeping the harvest

The consolidation process includes tracking and following-up on new converts from salvation through the encounters. This all starts with entering their contact information into Excellerate, and assigning them to a consolidator (or follow-up sponsor). Now consolidation assignments can be distributed via reports or email, and the responses collected for evaluating and measuring our success. The steps are:

- Assign the new visitor/salvation to a consolidator using the follow-up sponsor field in the follow-up tab. (The option for assigning divisions of the sponsor should be checked in the advanced options screen so the visitor is assigned to this sponsor's divisions).

- Email all of the sponsors by using the "Consolidation Follow Up Request (email)" custom report. This will email each sponsor with the contact information of his follow-ups.

- Print the Follow-up / Consolidation reports for the sponsors without email.

- Track the results of the consolidation with the contact fields in the Follow-up tab. As the consolidators turn in their results either by report, or email, update the contact fields for those follow-ups. If you are using the web integration, this information can be entered directly by the consolidator over the web.

- Track the encounters using the member steps tab.

- Track the details and attendance for Post-Encounter using a Post-Encounter class.

- Measure the success of the consolidation by running the Follow-up / Consolidation report and checking the totals and percentages.

The Consolidation Report/Graph allows us to measure our success by answering questions like: *"Out of all of our visitors from last month, how many have been contacted, been on encounters, joined a cell, etc…?"*

Disciple – Developing leaders

The discipleship process involves tracking a member's development from the point they join a cell group all the way through the School of Leaders. In Excellerate, you would use the following steps:

- Track the cell groups, cell members, and attendance in the cell module. If you are using the paper method, the Cell Meeting Entry screen is designed to help you quickly enter the weekly cell meeting results. Otherwise, the web integration is the most efficient way of tracking the meetings and attendance.

- Measure the success of the cell groups with cell meeting analysis reports: Cell Meeting Report by Division – for analyzing by Network or The12, etc… Cell Meeting Report by Date – for analyzing by weeks, months, etc…

- Track progress through the School of Leaders by using Member Steps, and School of Leaders classes in the class module.

- Use the views in the member module to identify people who have completed a particular member step, but have not moved on to the next step: “Completed Member Step A not B” to proactively encourage members to advance.

- Measure the success of the School of Leaders by running the School of Leaders statistical analysis reports.

Send – The 12, 144, 1728, …

The send process involves tracking leaders as they build their 12, 144, etc… We represent this entire structure in Excellerate so that we can report and analyze our progress at different levels. The G12 structure can be broken down into different levels starting with the “Network” level of: Men, Women, Youth, and Children. Then under each of those are the 12. So you would have the Men 12, Women 12, etc… Then under each of the 12, they have 12 and so on. In Excellerate, we represent those levels like this with the following codes for each level:

Level Name	Codes
Networks:	Men, Women, Youth, Children
The 12 (or Generation):	01..12
The 144:	01..12
The 1728:	01..12

To represent a specific cell group or cell leader, they get a code such as “Men-01-03” meaning the third leader under the first of the 12 in the men’s network. So, this leader would be at the 144 level.

Now, you can measure your success at any of these levels with reports and graphs. If we specify “Men”, we can report on the entire men’s network. Or, “Men-01” to report on the first of the 12 in that network.

Chapter 13: Internet Integration

There are two parts to Excellerate's Internet integration: Web Integration, and Email. Web Integration allows you to transfer data between Excellerate and your web site to provide features such as follow-up tracking, searching or listing groups, and entering weekly cell group report forms on your site. Built-in email allows you to easily send email messages to your members from within Excellerate.

Web Integration

The web integration feature allows you to integrate data from Excellerate with your church web site. Specifically, you can upload data and web scripts to your site using Excellerate's built-in transfer utilities to add the following functionality to your web site:

- New visitors can be added from the web site.
- Update follow-up information for visitors or any person in the database.
- Cell leaders can fill out their weekly cell group report forms online instead of turning in paper forms.
- Run reports analyzing cell meeting results, or other information.
- Users of your web site can search or view information about your cell groups.

To take advantage of the web integration features, you will need:

- FTP access to your web site. (You will need your userid and password).
- Your web server must support CGI scripting using PERL 5.004 or later.

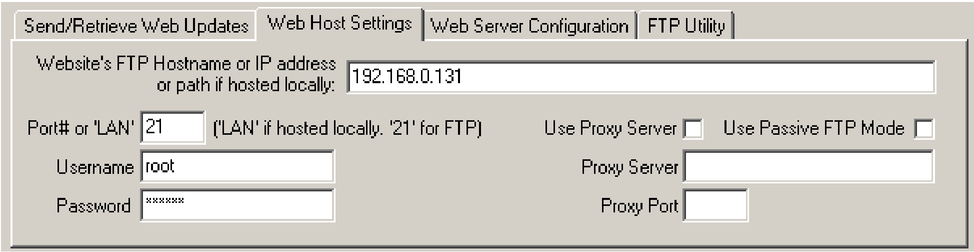
Setting up Web Integration

Setting up web integration basically involves two steps:

Entering your web-server information
Uploading Excellerate's perl scripts and support files

To setup web integration, use the Web Integration screen in the utilities menu option, or from the preferences screen.

Start by entering the following information about your web site, and how you access it in the **Web Host Settings Tab:**



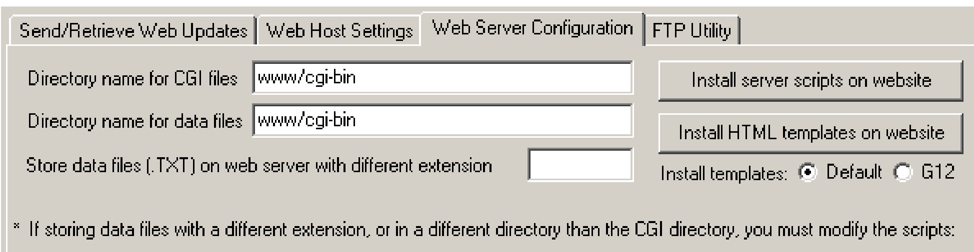
Web site's FTP Hostname or IP address or path if hosted locally - This is your web site's FTP hostname or IP address. It will look something like: FTP.MYCHURCH.COM. If the host is local to your network, you can specify the path such as \\servername\website

Port - This is the FTP port and is almost always 21 for remote servers, or use 'LAN' if hosted locally.

Username, Password - This is the user name and password assigned to you for logging into your web site or FTP host for making changes.

Proxy Server - If your local computer is behind a proxy server, or other layer before you get to the internet, enter that information here. See your network administrator.

Next, the **Web Server Configuration** tab holds information about your site:



Directory name for CGI files: This is the directory where your scripts will be stored. Most of the time this is called 'cgi-bin', but could be called 'scripts' or some other name. This directory must have 'Execute' rights to run the scripts. Check with your Internet service provider for information on running CGI scripts on your site.

Directory name for data files: This is where you want Excellerate to store the data files that get uploaded to your web site. For the simplest installation, use the same directory as your CGI files. This way you will not have to modify any of the script files. If you choose a different directory other than the CGI directory, you will need to modify EXFORM.PL and EXSUBMIT.PL to reflect the new directory name. See the section below on Modifying the scripts for a different data directory.

Store data files (.TXT) on web server with different extension: This option allows renaming the data files on the web server with a different extension. This is useful for increased security of your data files. You can rename your data files with .PL (perl) extension, which will prevent listing these files from the web. If you change this extension, you will need to modify the scripts to use the new filenames.

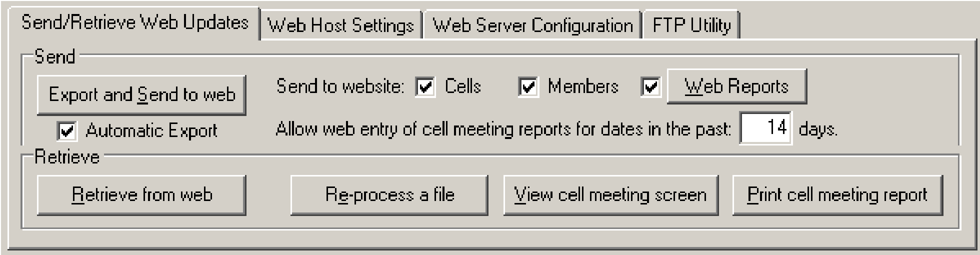
A simple built-in FTP utility is available in the FTP Utility tab. This utility will allow you to list files and directories of your web site, as well as upload/download other files. There is a 'Command' button, so if you know the names of the FTP commands, you can quickly enter them here. Also included on this page is a button that will upload your database or other files to Excellerate support if you need help with your data.

Now that the directories have been setup and scripts modified if needed, you can use the Install buttons to install the scripts and support files on your web site.

The **'Install server scripts on web site'** button will install the perl scripts to the cgi directory on your site.

The **'Install HTML templates on web site'** button will install the supporting template files to the data directory on your site. First choose which templates to install, either the default, or the G12 templates.

Finally, use the **Send/Retrieve Web Updates** tab to send the data files to the web site.



You can choose what data you want on the site. You will need to choose Cells and Members if you want to use online cell meeting reporting. Web Reports can be uploaded to allow for running reports on the web site. The "Allow web entry of cell meeting reports for dates in the past…" field specifies the number of days back that you want to allow entering reports for. By default it is set for 14, which will allow entering meeting history for the past two weeks.

Now you can use the Export Send to web button to export your cell and member data, and upload it to the web site.

By default, all non-sensitive member information fields are uploaded to the web site. To see what those fields actually are, look at the 'website.map' file located in the Excellerate folder. You can modify this file to remove any other fields that you do not want to be uploaded to your web site.

Now, your web site is ready for web integration. By default, the following URLs will run the scripts. Of course, replace WWW.MYCHURCH.COM with your web site, and cgi-bin will be the name of your CGI directory:

www.mychurch.com\cgi-bin\exinfo.pl logs into a leader's info screen.
www.mychurch.com\cgi-bin\exform.pl logs into weekly cell meeting entry.
www.mychurch.com\cgi-bin\exclsrch.pl finds and lists cell groups.

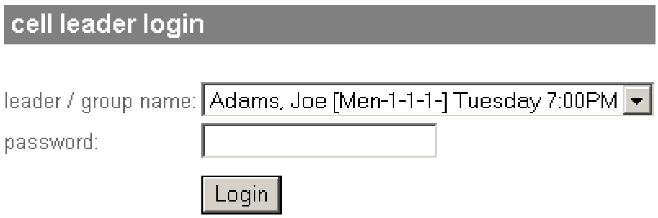
You will probably want to add a link to your web site that takes your users to these functions, so they don't have to type in the URLs themselves.

Using web integration

Now that the site has been setup, you can begin using Excellerate's web integration features.

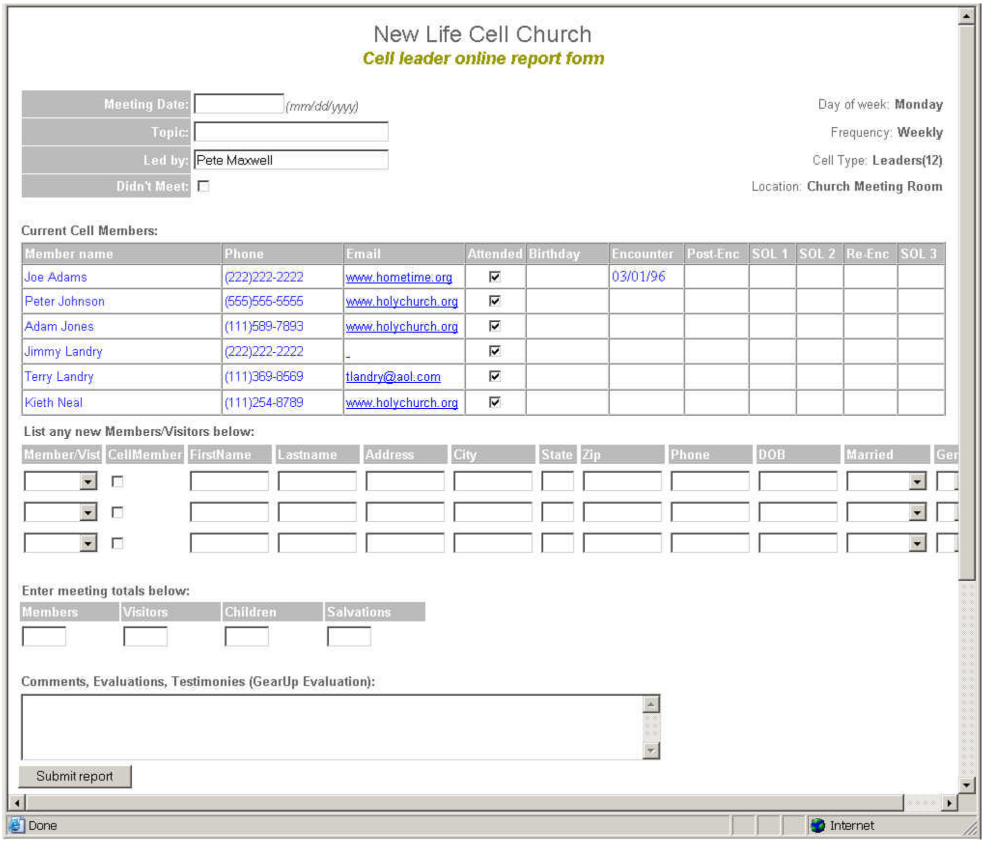
Cell Leader Meeting Reports

To enter weekly cell meeting reports, the cell leader first logs into his cell group:



The default password for leaders logging in is the last four digits of their phone number. For cell leaders, this is actually the last four digits of the phone number in the Primary meeting phone field in the cell record. You can change the password field by modifying the scripts.

Once logged in, their weekly meeting report form will appear:



New Life Cell Church

Cell leader online report form

Meeting Date:	(mm/dd/yyyy)	Day of week:	Monday
Topic:		Frequency:	Weekly
Led by:	Pete Maxwell	Cell Type:	Leaders(12)
Didn't Meet:	☐	Location:	Church Meeting Room

Current Cell Members:

Member name	Phone	Email	Attended	Birthday	Encounter	Post-Enc	SOL 1	SOL 2	Re-Enc	SOL 3
Joe Adams	(222)222-2222	www.hometime.org	☑		03/01/96					
Peter Johnson	(555)555-5555	www.holychurch.org	☑							
Adam Jones	(111)589-7893	www.holychurch.org	☑							
Jimmy Landry	(222)222-2222		☑							
Terry Landry	(111)369-8569	tlandry@aol.com	☑							
Kieth Neal	(111)254-8789	www.holychurch.org	☑							

List any new Members/Visitors below:

Member/Vist	CellMember	FirstName	Lastname	Address	City	State	Zip	Phone	DOB	Married	Ger
	☐										
	☐										
	☐										

Enter meeting totals below:

Members	Visitors	Children	Salvations

Comments, Evaluations, Testimonies (GearUp Evaluation):

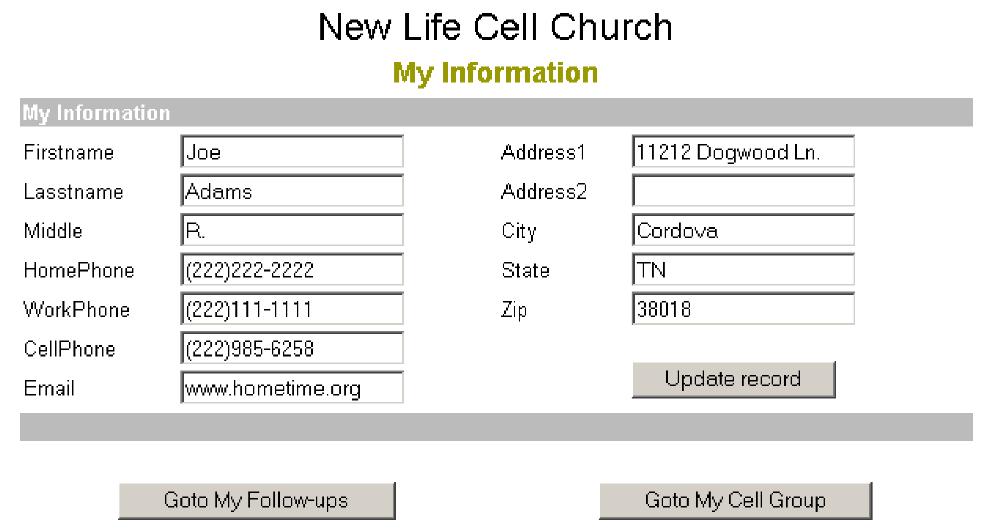
Submit report

Done Internet

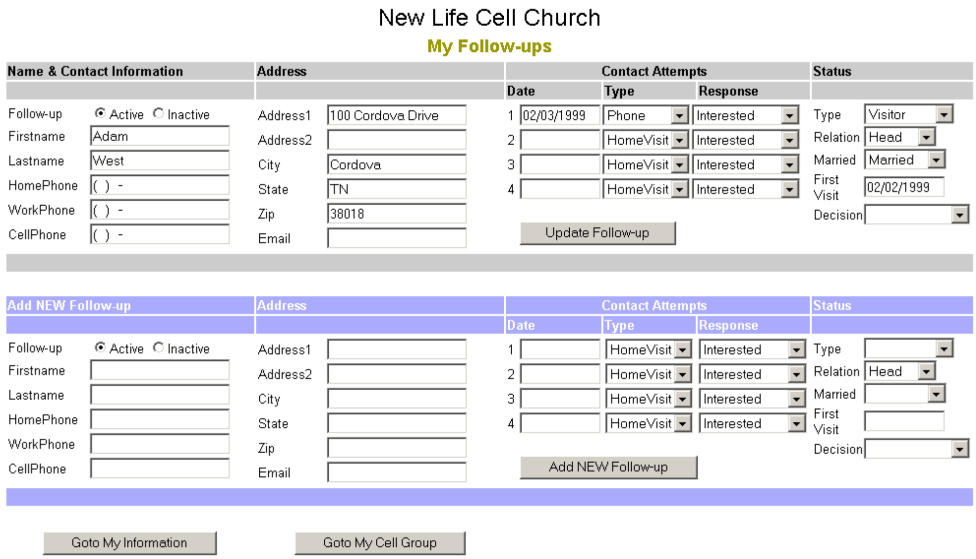
Here, a leader simply enters the information about the meeting, checking those who attended, and entering any new members or visitors as well as any comments. That information is then submitted for Excellerate to import.

Member / Visitor follow-up updates

To update visitors and follow-up information, the leader or sponsor logs into their info screen:



From this screen the leader can update any if his own contact information, or go to his Follow-ups, or his cell group. After pressing the Goto My follow-ups button the following screen appears:



From here, the leader can update any of his follow-ups information, or enter a new visitor they are following up on.

When updates are submitted from the web, the user will see a message that the information has been submitted, and will be updated during the next web update. Basically, this means that they wont see the changes reflected until you retrieve the updates from the web, and process them. This can be done as often as you wish, daily, weekly, etc…

Search / List cell groups

Visitors to your web site will be able to search/list groups based on zip code, or description of the cell. For zip code searching, the zip code for the cell group needs to be entered somewhere in the Primary meeting address field for the groups. You may modify the script to search on a different field if needed. To list all groups, leave the search criteria blank. Here is an example list:

Men's Prayer Breakfast
Facilitator: Joe Adams
info@email.com
901.222.4444

Tuesdays @ 6:30 AM
Church Administrative Office
100 North Street in Cordova

This Men's Prayer Cell Group will meet in the Cordova area every Tuesday morning at the church office. For more information email info@thelifechurch.com.

Childcare: No childcare provided
Requirements: None

Women's Book Study
Facilitator: Tina Adams
tina@email.com
901.333.4444

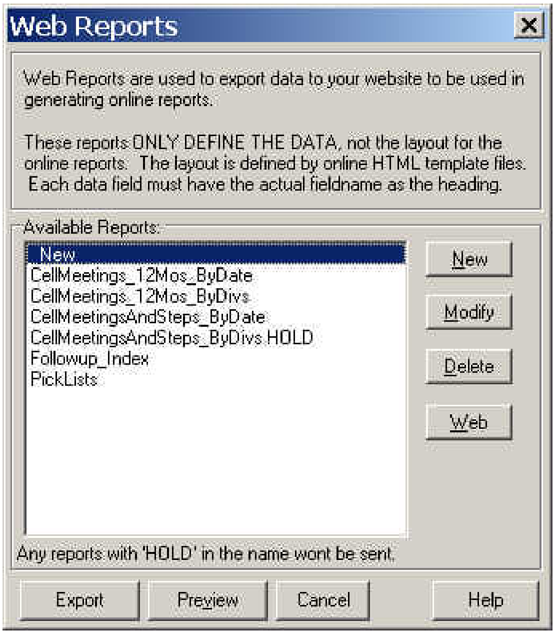
Thursdays @ 7-9 PM
123 Main St in Cordova

Join us as we discuss Battlefield of the Mind *by Joyce Meyer.*

Childcare: No childcare provided
Requirements: Participants will need a copy of *Battlefield of the Mind* by Joyce Meyers.

Web Reports

Excellerate has the ability to allow reporting on your web site from just about any Excellerate data. This is done using a two-step process.



First, you use the Web Reports feature to **define the data** that will be uploaded to the web site for reporting. This is done by creating a Web Report, which is a custom report that simply gets exported to a text file and uploaded to the web site. Therefore, the layout of the Web Report, does not affect the layout of the actual report on the web, it only defines the data. The report should be simple plain-text field names in the title band, and data fields in the detail band. Any Web Reports with the word HOLD in the name will not be uploaded to the web site. See the section on custom reports for more information.

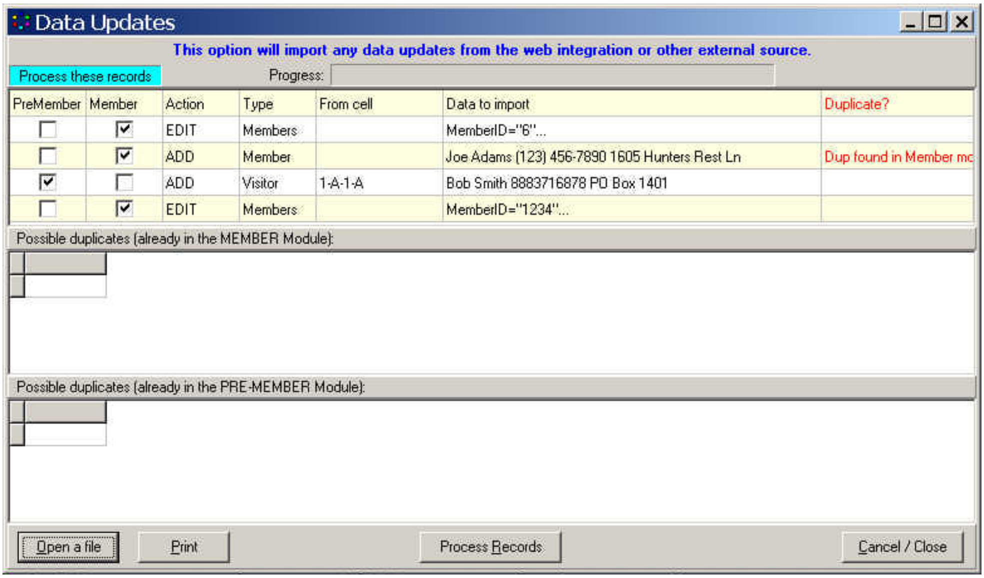
Next, you define the layout or look of the report using an HTML template. The HTML template defines the different reporting bands, their colors, fonts etc… and contains data tags such as ^LeaderName^ to show data fields.

Finally, once you've updated the web site from the web integration screen with the data and the template, you use the web script exwebrpt.pl to run the report. The script should be run from an HTML <FORM> on your website. Creating these reports will require the skills of a web designer, but looking at the included web reports will help. The following files are used in generating the "My Group Meeting History Detail Report":

WR_CellMeetings_12mos_ByDate.QR – the web report that defines the data.
EXWR_CellHistory.htm – the HTML template that defines the layout of the report.
Exreport.htm - the page that calls exwebrpt.pl to run the report.

Retrieving the web updates

When information is submitted on the web, it is stored in a file on the web waiting to be retrieved by Excellerate. To retrieve and process the updates, go to the Web Integration screen, and hit Retrieve from web. Excellerate will look for any updates, download them, save backup copies, then process them. When processing cell meeting reports, the entries will be entered into the database, and can be reviewed from the cell meeting screen by hitting View cell meeting screen button. When processing member updates, the Data Updates screen shows any pending updates allowing you to approve the requests, and specify which module the new additions should be imported into:



From this screen, you can see if a new addition already exists in the database, indicated by the red comment "Dup found in…" If you select that record, you will see the possible duplicates in the lower windows. At that point, you can decide if you should import the record or not. If you do want to import it, place a check in the module that it should import into. To skip the record, remove any checks.

Member changes requests will also appear as EDIT requests. Those can be skipped as well.

Any requests to add a new cell member will be processed by adding the person to the database, but not to the cell. These must be done manually, but all of the information will have already been entered. You simply need to print the update screen, then go to the cell group, and pick the new cell member from the picklist.

Any errors that may occur during this update will be listed and can be printed for your reference.

Re-processing a file

If for some reason you need to re-process a file that had errors, or was skipped, you can do so by hitting the Re-process a file button. This will allow you to open the file and process it again. The files that were downloaded from the web are backed up in the UPDATES folder within your Excellerate folder, so you will want to navigate to that folder to find the files. If you find it necessary to edit one of the update files due to a data entry error, it is possible, but be careful not to alter the format of the file. The files are plain text files with tab separated fields, and can be edited with notepad or some other text editor if necessary.

Data Updates from other sources

Member updates can be imported from other sources besides the web site as long as the file is in the same format. The Data Updates screen can be accessed from the File menu, then Import Data Updates. The Data Updates file should be in the following format with each line containing the following. All fields are TAB separated:

COMMAND MODULE MEMBERID DATA

COMMAND - ADD, EDIT, or DELETE.
MODULE - Members, or PreMembers.
MEMBERID - The field-value pair: MemberID="0" for new records, or the actual ID# if editing a record
DATA - Any number of field value pairs tab separated.

Here is an example file:

```
ADD  Members    MemberID="0"                         MemberType="Member"        Lastname="Adams"
     FirstName="Joe"
ADD  Members    MemberID="0"                         MemberType="Visitor"       Lastname="Smith"
     FirstName="Bob"
EDIT Members    MemberID="1234" Addr1="PO Box 1401"
EDIT PreMembers MemberID="363"                       MemberType="Visitor"
```

Example weekly web integration steps:

-Use the 'Retrieve from web' button on the web integration screen to retrieve any cell meeting results that may have been entered.

-Cell Meeting Results will be processed automatically, but any member updates need to be approved in the data updates screen. Any new cell members will need to be assigned to their cell groups manually.

-Use the 'View cell meeting screen' button to view any meetings that may have been retrieved from the web. Meetings from the web will appear on the left with a red 'w' next to the date of the meeting. If you see 'w!', this means there are comments that may require your attention. Any information that you request in your online cell leader report form that can not be directly imported into an Excellerate cell meeting entry will be included in the comments section of the cell meeting entry. This way you can be flagged that there is more information and you can decide what to do with it.

-Use the 'Export and Send to web' button on the web integration screen to upload new information to the web site.

-Use the 'Print cell meeting report' to print a report for those entries. Again (w) indicates a meeting from the web.

-Continue with your normal weekly cell routine, but now many of your weekly totals will already be entered for you!

Modifying Web integration to fit your web site

All of the included web integration files can be modified to meet the needs and look, of your church web site. The following information will help any web developer in modifying the PERL or HTML files. The PERL scripts use HTML templates to display the pages, so these files can be modified to look like whatever you want. The PERL files can be modified if you need to change the functionality of the scripts.

Modifying the scripts for a different data directory

The script files use a variable called $database_files_dir to find the uploaded data files. If you are storing the data files in some other directory other than the CGI directory on your web server, you will need to edit this variable in your scripts. Find the line that says:

```
my $database_files_dir = '';
```

This line needs to be changed to hold the directory name of where you want to store your data files. All web servers are not standard, so the exact file specification may be different from host to host, but the general rule is to put the path of the data directory starting from the web user's login root directory. So, if the actual data directory is called 'c:\home\root\username\DataFiles', and a web user's root directory is 'c:\home\root\username', then the $filesdir variable would look like this:

```
my $database_files_dir ='DataFiles';
```

If the data directory was 'c:\home\root\username\DataFiles\Excellerate', then the $filesdir variable would look like this:

```
my $database_files_dir = 'DataFiles\Excellerate'
```

Again, each host is different, but if you are having trouble with the script look at the error message generated when trying to execute the script. It will give you an idea of where it is trying to find the data, then you can adjust your $database_files_dir variable accordingly. One advantage of putting your data files in a separate directory is that you can set the access rights of that directory so that the data can not be accessed by anyone except by using the scripts. See your web site administrator for information on how to restrict access to that directory.

Modifying the "Cell Leader Report Form" HTML template (EXREPORT.HTM).

The look of the Cell Meeting Report Form is based on a template. The template is read in by the script, then outputted to a web page with the cell's information included. The template can be modified to accept different types of information. The standard information such as meeting date, and member/visitor counts will be imported into the cell meeting history table. Any information that you request in your online report form that can not be directly imported into an Excellerate cell meeting history will be included in the comments section of that record. You will be flagged with a red 'w!' which means there is more information for you to do something with.

All INPUT NAMEs and field names are case sensitive. Use the form tag like this:

```
<FORM name="Name" action=^LocationOfScript^>
```

The ^LocationOfScript^ tag will be replaced by the cgi with the correct information. Somewhere in the form, you have to include this comment:

```
<!-- Form Variables -->
```

This is used by the script for internal information.

The following tags are required for the cell leader report form. These tags must appear in the report form. If you do not want input tags displayed for user input, set their TYPE=”HIDDEN”.

Display cell information tags (required):

```
^Cells_Name^ for the cell's name
^Cells_LeaderName^ for the cell's leader's name
```

Input tags for cell information (required): (These fields will be validated when the form's script is called)

```
<input name="DATE" type="text" size="12" >
<input name="TOPIC" type="text" size="30">
<input NAME="LEADBY" TYPE="text" SIZE="30" Value="^Cells_LeaderName^">
<input type="checkbox" name="DIDNTMEET" value="true">
```

Input tags for cell meeting information and totals (required): (These fields will be validated when the form's script is called)

```
<input NAME="MEMTOTAL" TYPE="TEXT" SIZE="4">
<input NAME="VISITORS" TYPE="TEXT" SIZE="4">
<input NAME="CHILDREN" TYPE="TEXT" SIZE="4">
<input NAME="SALVATIONS" TYPE="TEXT" SIZE="4">
<input NAME="USER1" TYPE="HIDDEN" SIZE="4">
<input NAME="USER2" TYPE="HIDDEN" SIZE="4">
<input NAME="USER3" TYPE="HIDDEN" SIZE="4">
<input NAME="USER4" TYPE="HIDDEN" SIZE="4">
```

Change the HIDDEN types to TEXT to make them appear on the report form.

The following tags are optional:

To display cell member information on the form, wrap the member section in comment tags like this:

```
<!-- Exc MemberInfo -->

Include in this area the html you want to use to display
member information (tables are usually used)
Keep in mind that whatever is between these comment brackets
will be repeated for each cell group member

<!-- Exc MemberInfo -->
```

If you want a specific member field to show up in the cell member information area, include the field name with delimiters such as ^Field_Name*^. For example, to show a member's first and lastname use:

```
^Mem_FirstLastName*^
```

The delimiters are crucial. If you want the birthdate and anniversary to show up if they occur during the next two cell weeks, use ^BIRTHDAY^ or ^ANNIVERSARY^. You can also use both in the same field like ^BIRTHDAY^^ANNIVERSARY^

Modifying the "Cell Searching and Listing" HTML template (EXCLSRCH.HTM)

To change the look of the list results, you will modify the Cell Group Search results template.

Note: All INPUT NAME's and field names are case sensitive. Wrap the results section in comment tags like:

```
<!-- ExcCellSearchInfo -->

You put the individual cell fields you want to display in here.
This entire section will be repeated for each cell that matches
the query string.

<!-- ExcCellSearchInfo -->
```

The actual cell information fields you want to display should be have the form ^Field_Name*^. For example, to show the Cell Description field, use:

^Cells_Description^

There are two default styles of the cell search results templates:

Exclsrch (listing form).htm
Exclsrch (paragraph form).htm

The first one lists the found cells in a table, one row at a time. The second template lists each cell in a paragraph format. To use one of these styles, copy it to the default name of exclsrch.htm before uploading your scripts to the web site.

Cell Name	Leader	Meets Day	Meets Time	Frequency	Primary Phone	Primary Address	Description
1-A-1-C	Joe Adams	Friday	8:00PM	Weekly	(222)222-2222	150 West Addison	This cell is made up of mostly young married couples with small children. Childcare is provided by our KidsLife workers and sometimes a parent will volunteer to help with the kids.
1-A-1-A	Tina Adams	Tuesday	7:00PM	Weekly	(222)222-2222	100 West Blvd	

Modifying the "My Information" and "My Follow-ups" HTML templates (EXMYINFO.HTM, EXFOLLOW.HTM)

The EXINFO.PL script is used to generate the forms for "My Information" as well as "My Follow-ups". To modify the look of these forms, including adding or removing other data fields, you need to edit EXMYINFO.HTM and EXFOLLOW.HTM. Data fields for these pages come from the exmembrs.txt data file, so any fields referenced must match the fieldnames in that file. If you have added your own flex fields the Excellerate, you may need to modify the website.map file to include those fields. This file tells Excellerate which fields to export to the web. Some example field names are:

```
^Mem_Firstname^
^Adr_Addr1^
```

For exfollow.htm, follow-up information must be wrapped in comment tags like:

```
<!-- Followup Info -->

You put the followup data fields you want to display in here.
This entire section will be repeated for each followup person

<!-- Followup Info -->
```

The follow-up form will list a leader's current follow-ups, but can also include a section to add a band new follow-up. This section will have blank fields to be filled out with the new information. Any blank follow-up fields for new follow-up adds, must be outside the <!—Followup Info → section, and will have a form button like this:

```
<input name="FollowupAdd" type="submit" value="Add NEW Follow-up">
```

These HTML templates also contain buttons that pull up other forms. Any time you use one of these buttons, they need to be inside their own <FORM> area, and should include a special comment tag:

```
<!-- Session -->
```

This tag tells the scripts to insert special variables containing the current MemberID, etc… which may be needed to call the other forms.

Modifying a “Web Report” HTML template

Web Reports also use HTML files fore describing the layout of the report. The Cell History report is one example. Data fields for these reports come from the Web Reports that you create in the Web Integration module. These reports define the data, which is exported as a text file and uploaded to the web site. Any fields referenced must match the fieldnames in that file.

Data fields that are not in the uploaded web report data file are assumed to come from the master file. The church name, for example, would just be referenced as ^Name^

Web Reports use several bands to output information, and each band must be wrapped in the appropriate comment tags:

```
<!-- Detail Band -->

You put the report data fields you want to display in here.
This entire section will be repeated for each record in the web report
data file.

<!-- Detail Band -->

<!-- Group Band -->

You put the group functions that you want to display in here.
The following functions can be used:
SUM, AVE, MAX, COUNT, COUNT_RECORD
When using these functions they precede the data field that they operate
on like this:  SUM_MemberCount
To show actual data fields in this band precede the field with DATA_

<!-- Group Band -->

<!-- Summary Band -->
```

```
The summary band functions just like the group band, but is displayed
at the end of the report for showing report totals.

<!-- Summary Band -->
```

To show the date of the data file on the report, use: ^FILEDATE^
To show the selection criteria on the report, use: ^SELECTION_CRITERIA^

See the EXWR*.HTM files for examples

Calling the EXWEBRPT script

Running the EXWEBRPT.PL script must be done from an HTML <FORM> where the parameters for the report are contained in the form variables:

```
<form name="f4" action="^SCRIPT_LOCATION_exwebreport^?report method="post">
<input name="DEBUG" value="0" type="hidden">
<input name="DATA" value="exwr_cellmeetings_12mos_bydate.txt" type="hidden">
<input name="TEMPLATE" value="exwr_cellhistory.htm" type="hidden">
<input name="GROUP" value="" type="hidden">
<input name="SELECTION_CRITERIA" value="CellID=1" type="hidden">
<input type="submit" value="View">My Group Meeting History Detail
<select name="DATERANGE" size=1>
<option>This Week<option>Last Week<option>This Month<option>Last
Month<option>This Year<option>
</select>
</form>
```

Since this form is contained in the EXREPORT template, which gets processed by replacing variables with real data, the value of CellID in the SELECTION_CRITERIA variable can be automatically evaluated, instead of hard-coded, when the real leader report form is generated. So that SELECTION_CRITERIA really looks like:

```
<input name="SELECTION_CRITERIA" value="CellID=^Cells_CellID^" >
```

The EXREPORT.HTM templates are examples of calling EXWEBRPT.PL

List of Excellerate's Web Integration Files

All of Excellerate's web integration files start with the letters 'ex'

Cell Reporting:

exform.pl	Script for logging into weekly cell reporting.
exlogin.htm	Alternate HTML form for logging into weekly cell reporting.
exsubmit.pl	Script to process entered weekly cell report forms.
exreport.htm	HTML template defines the look of weekly cell report forms.
exreport_g12.htm	Alternate HTML template for G12 model.

Web Reporting:

exwebrpt.pl	Script for generating the report.
exwr_cellhistory.htm	HTML template - the layout of the report.
exwr_cellmeetingsandsteps.htm	HTML template - the layout of the report.
exwr_Cellsummarybydate.htm	HTML template - the layout of the report.
exwrcellsummarybydivs.htm	HTML template - the layout of the report.

Cell Searching:

exclsrch.pl	Script for searching for, and listing cell groups.
exclsrlg.htm	HTML form for searching for cell groups.
exclsrch.htm	HTML template for what the cell list looks like.

My Information / My Follow-ups:

exinfo.pl	Generates info screens and processes the submissions.
exfollow.htm	HTML template for the layout of the My Information form.
exmyinfo.htm	HTML template for the layout of the My Follow-ups form.

Data Files:

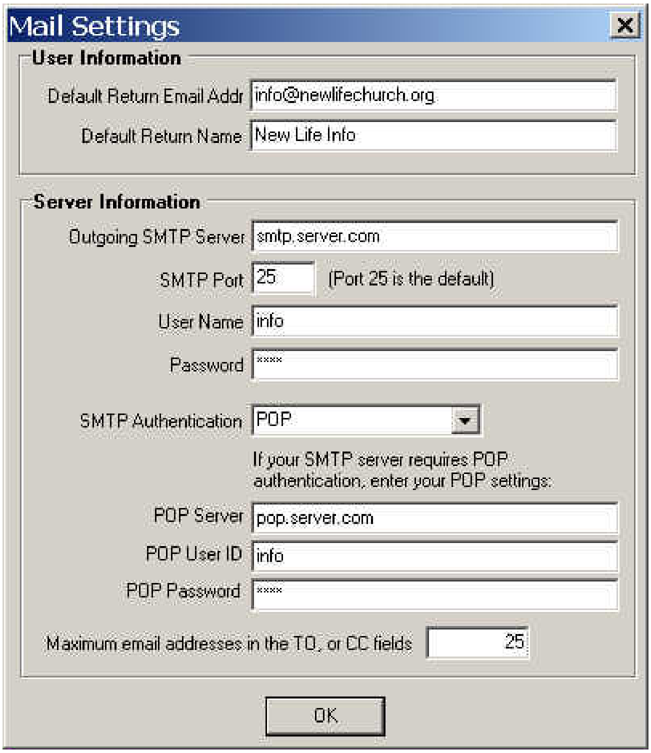
exbusy.txt	Flag file telling scripts we're uploading data.
exmaster.txt	Excellerate's master table uploaded to web site.
excells.txt	Excellerate's cell table uploaded to web site.
exclmems.ndx	Excellerate's cell member IDs uploaded to web site.
exclhist.txt	Excellerate's cell history uploaded to web site.
exmembrs.txt	Excellerate's members uploaded to web site.
exmembrs.ndx	Member ID index file for faster access to exmembrs.txt.
exupdate.txt	Data updates file containing member changes.
exwr_followup_index.txt	Sponsor - Follow-up cross reference file.
exwr_picklists.txt	Picklist values used in Excellerate.
website.map	Map file listing which fields to send to the web site.

EMAIL

Excellerate has the ability to send email to your members and pre-members. You can send emails to an individual member, or to an entire view of members. Email messages can be formatted with different fonts and colors, as well as include merge fields and file attachments. Excellerate's report styles can be modified to include email addresses, and automatically emailed to those members.

Setting up EMAIL

To setup Excellerate's email feature, go to the Options menu, then Preferences, and choose the 'Email options' button.



Default Return Email Addr - This is the default return email address that can appear on your messages.

Default Return Name - This is the default name of the sender that canl appear on your messages.

Outgoing SMTP Server - This is the outgoing email server name or IP address. A typical server name might be mail.mychurch.com, or smtp.mychurch.com.

SMTP Port - This is the port number for the SMTP server, and is usualy 25.

User Name - This is the userid for the SMTP server assigned to you when you set up your email.

Password - This is the password for the SMTP server assigned to you when you set up your email.

SMTP Authentication - Your SMTP server may require authentication. Choose the method of authentication your server requires. If POP authentication, make sure you enter the POP Server information.

POP Server - This is the incoming POP server which may be required if your outgoing server uses POP Authentication.

POP UserID - This is the userid for the incoming POP server which may be required if your outgoing server uses POP Authentication.

POP Password - This is the password for the incoming POP server which may be required if your outgoing server uses POP Authentication.

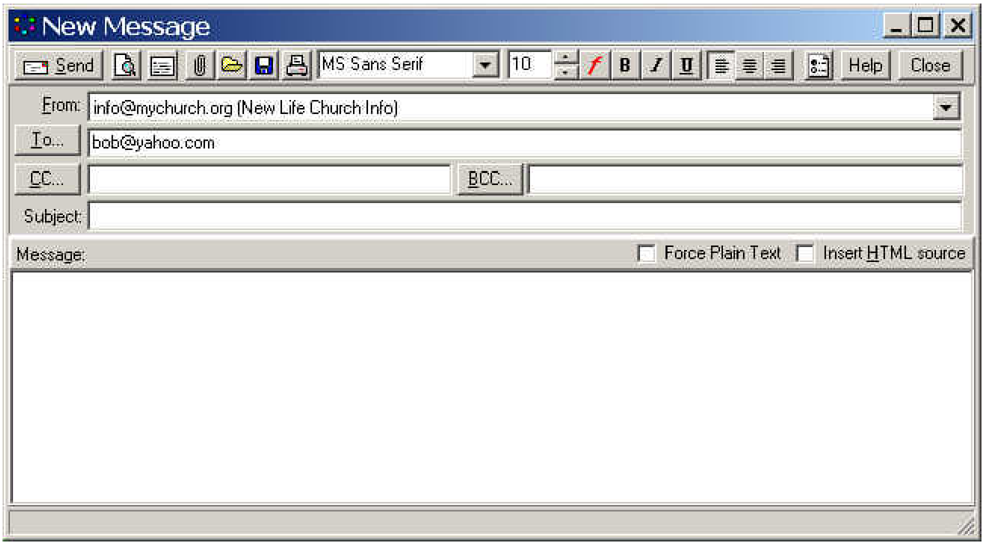
Maximum email addresses in the TO or CC fields - When sending emails to a list of members, Excellerate will try to put as many email addresses in the TO, or CC field of a message that it can. The maximum number of addresses allowed on many servers is 50. If your server only allows more or less, you can enter that number here. The default is 25.

If you want your users to be able to send emails with their own return address, you can enter their email addresses in the user-id setup screen. Then the user will have a choice of sending the message from their own email account, or from the church email account.

Excellerate only allows sending emails, so any replies or returned emails will have to be received by your normal email program.

Using EMAIL

To send an email, you must be in one of the people modules (members, pre-members, or pastors.) Simply highlight the member you wish to email, and hit the email button on the right side of the toolbar. The email screen will appear with that person's email address entered if they have one. Otherwise it will be blank. You can also send an email for a member within their member edit screen by hitting the 'Email' button next to their email address.



To select other members to include on this email, use the To, or CC buttons. This will bring up a screen that will allow you to type in additional email addresses, choose other members, or to select the current view of members. Addresses can be added to the To, CC, or BCC list, by using the appropriate buttons. Email addresses in the BCC list will not be seen by the other recipients of the message.

When sending emails, you may want to send them from your own personal email address, so that when a person replies, you will receive it in your email program. Or you may want to send email from the church main email address. You have the option of choosing which email address the message will be from, by selecting either your own, or the churches email address in the From picklist. The church email address can be setup in the mail settings under preferences, and your email address is set up when your user-id is created.

A formatted message can be entered, using the font, and color tools in the toolbar.

Use the attach button to attach files.

You can also send full HTML emails that include graphics. This method sends the HTML source, but the graphics are stored on your web server. Basically, you would design a web page on your server, then just copy and paste the HTML source code into the HTML source field of the email. Select the “Insert HTML source” field to see the window for pasting your HTML source. When sending HTML messages, you can enter the plain-text version of the message in the regular message screen for users who cannot view HTML messages.

When sending emails from Excellerate, the sent messages are saved in the sent mail screen. To see a list of sent emails, use the Utilities menu, then Email, then View sent mail. This screen will allow you to view and retrieve sent emails. If for some reason you want to send an email to an individual, but you want to send it from your default mail program, you can use the Utilities menu, then Email, then Email this member using default mail program. This will send the message using your default mail program, and the sent message will be saved in that program’s sent messages folder.

There is also a menu option in the Help menu for quickly emailing technical support.

Merge-Fields In EMAIL

Excellerate also allows including merge fields in your emails. To include fields from a member’s record, use the [table.field] notation. So if you wanted to email all of your new visitors, and address them by their first name, you would use:

Dear [Members.Firstname],

Excellerate would replace [Members.Firstname] with the member’s first name. To see what the email would look like with the data inserted, use the preview button in the toolbar.

You can include fields from the MEMBERS, PREMEMBERS, or CELL table.

EMAIL-ing Reports

There are two methods of emailing reports in Excellerate. Any report that you generate in Excellerate can be emailed by previewing the report, then hitting the email button. This will save an RTF version of the report (without any lines or graphics) and send that with the email. The other method can actually send multiple emails to different individuals listed in the report. There is an example of a cell leader report style that can be emailed. To create a report style that can be emailed, all you have to do is insert a special field in the report. When you go to PRINT the report, Excellerate will check first to see if it can be emailed, if so you will be asked if you want to email it. If not, it will be printed as normal. The following email fields can be added to your report style:

EMAILTO:emailaddress
EMAILBYID:Members.MemberID
EMAILADDR:Members.Email

EMAILTO: emails to the hard-coded email address that follows.
EMAILBYID: emails to the email address for the memberID database field that follows.
EMAILADDR: emails to the email address for the email database field that follows.

When the report engine sees one of these fields, it will email everything from that field until it sees another one. For example, in a cell leader report form, each page would go to a different leader. So, in the top of the report style in the detail band, you would place an EMAIL field, then the report engine would email each page to the appropriate person. See the section on creating report styles for more information on modifying these reports.

Basically the report engine converts the report to text, then emails it. So you will probably have to modify your styles to fixed text font, and spaced out enough so that the conversion to text looks correct. See the included cell leader report form for an example.

In some cases when using EMAILTO:, you may need to insert a special code called EMAILEND at the end of a section to be emailed to indicate the end of the email. This tells Excellerate that this is the end of the email in cases where an EMAILTO: may be blank.

Chapter 14: Utilities and Preferences

The following functions are available in the Utilities menu:

Change User Password

Your users may want to change their passwords occasionally. This can be done from the Utilities menu option. You must know your current password in order to change it. When entering a new password, you must enter it twice to be sure you typed it correctly.

Set Database Password

This option allows you to specify a password for the entire Excellerate database. This password will protect your database from being opened from another program, such as Microsoft Access, unless that user knows the password. When you set a database password, Excellerate will still be able to open the database without prompting your users for the password. Only when an attempt is made to open the database from any other program, will you need the password. If you are setting the database password for the first time, you will leave the current password blank, and only specify a new one. When you set a database password in Excellerate, it will be converted to all uppercase letters, so if you want to open the database with another application, remember to use all uppercase. When setting a database password, Excellerate makes a temporary copy of the database, so be sure you have enough disk space available to hold the temporary file. Also, no other users can be using Excellerate when you change the password.

Remove Members

When you delete a member in Excellerate, the member record is still in the system, and can be viewed by viewing the Deleted/Inactive members. This is so that history can be kept on these members, and so that you can recover the member if you deleted them by mistake. To permanently remove deleted members, you use the Remove Deleted Members option in the Utility menu. This option can not be recovered from, unless you have a backup, so use caution:

When using this option, you have the choice to remove all deleted members, or if the current member you were viewing has a Deleted status, you have the choice of removing that one member. This option permanently removes the members, so you also have the option of printing out the records before removing them. You have the choice of printing a detailed report, a list, or no report at all.

You also have the option to remove all members from your current view, e.g. all members in the state of Texas. To do this you need to create a view of the members you want to delete. Select the Remove members from the current view: All Members option. We suggest that you select the option to print a member list or detailed member report before proceeding to delete that view. This process is irreversible so use extreme caution when selecting which group of members you want to delete.

When the Remove Deleted Members option is used from the Pre-Member Module, you have an added option of removing Pre-Members whose first visit to the church is older than a certain date. This allows you to remove people from the system who are no longer being followed-up on, or have no interest in the church.

The Remove Deleted Members option requires DATABASE security access to perform this action.

Remove Old Contributions

Excellerate can store years of contribution data even after all of the reporting has been done for those years. This allows you to continue to report and analyze giving history for those years. Although it is convenient to have that data on hand, you may be able to improve performance in the contribution module by removing those old contributions. The remove old contributions option allows you to first make a copy of your current database to a backup file, then to delete contributions for previous years that have already been reported. This way, the size of your current database is reduced improving performance, and you can always open the backup copy of the database to access the removed contributions. After removing the old contributions, it is a good idea to run the Reindex/Compact utility.

Re-Index / Compact Database

When Excellerate removes deleted records from the database, the space they took up on the hard disc is not necessarily recovered. If you have deleted a large number of records from the system, you could run the Re-Index / Compact Database utility option to recover that space. This operation requires DATABASE security level.

Remove Old Locks

Excellerate will periodically put locks on information that is being updated by users. In the event of a power failure, or some other reason for improperly exiting Excellerate, there may be a lock left open. If you receive a message indicating a user has something in use, and you know for sure this is not the case, you can use this option to remove that lock. This should rarely happen. This option requires DATABASE security.

Edit History Fields

The Member module can track changes to critical fields, and record those changes in the Member History associated information tab. You can specify which member fields get tracked this way by using the Edit History Fields utility. With this utility, you simply list the fields in the Member or Address table for which you wish to record change history. This option requires PREFERENCES security

Edit Required Fields

The Member and Cell modules can require a user to enter certain fields before saving a record. For example, it is a good idea to require a member's last name, first name, and member type when adding members. The list of fields that are required by these modules can be specified in the Edit Required Fields utility option. With this utility you simply list the fields from the Member, Address, or Cells tables that you want required. This option requires PREFERENCES security.

Update Cell Meeting History

See Updating Cell Meeting History in the chapter on Cells.

Enter Church Attendance

See the chapter on Church Attendance.

Setup Wizard

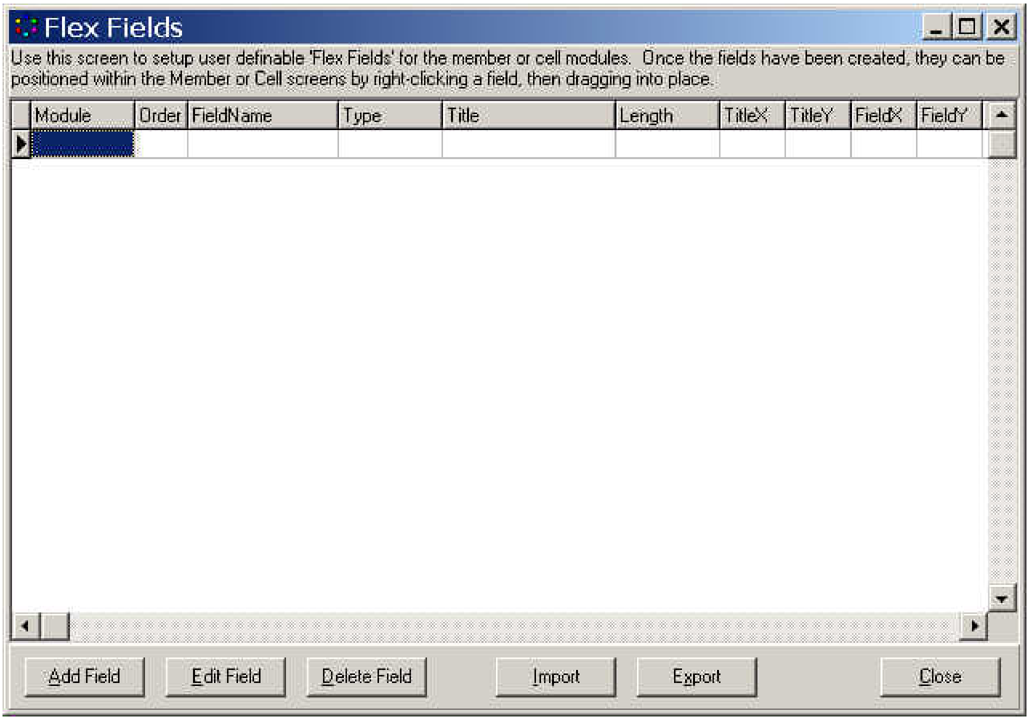
The setup wizard can be run to re-configure many of Excellerate's options. This will change your divisions, picklists and member steps. See the Getting Started chapter for more information.

Flex Fields

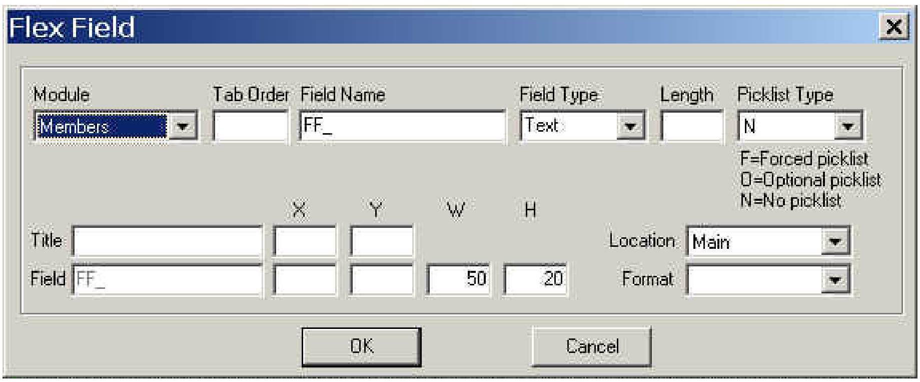
Flex Fields are user definable fields that can actually be added to the Excellerate database. These fields can be added to the member, cell, class, or organization edit screens, and positioned by simply dragging them into place. These fields are great for information that you want to keep track of that doesn't quite fit into the existing fields. You can also designate whether your new fields use picklists or not. Since these fields are added to the database, they can also be used in views, reports and even exported to your website for use with Excellerate's internet integration. Your flex field definitions can be imported and exported so that you can add new groups of fields that may be offered by our support staff, or even other churches.

Adding Flex Fields

To add flex fields, use the Utilities, Setup Flex Fields, menu option. You will see the following screen:



Hit the Add field button to add a new field.



Module specifies which module to add the field to. You can choose members, cells, classes, or organizations. Tab order allows you to specify the order in which you tab through your fields. Enter 1 for the first field, 2 for the second, etc... You may leave this field blank. Next choose a name for your new field. **All flex fields must start with FF_**, so if you may have a field like FF_SchoolName. Next choose the type of field: Text, Number, Date, Currency, Yes/No, Memo. For Text fields, you will also need to specify the length (1 - 255) for the field. If the field will need a picklist, choose the picklist type. Use 'F' for a forced picklist, which means that the entry must come from the picklist only. Use 'O' for an option picklist, which allows other entries besides the values of the picklist. Use 'N' for no picklist. Entries for these picklists can be added in the Options, Picklists menu just like other picklist values. The next section allows you to specify a title to appear on the screen for the field, and positioning of the field. You may enter the X, Y, W (width), H (height) values for the field, or leave the X and Y blank. Once the field has been added, you can reposition within the screen later. Also choose the location for the field. For Member fields, they can be placed in the main screen, the Follow-up tab, or the Member step tab. For the other modules, you can only choose the main screen. Finally, specify any special display format for the field, such as Bold.

If you wish, you may add titles without fields, or fields without titles. Just leave the title, or field blank. **The first flex field must have a title.**

You may also edit or delete flex fields using the corresponding buttons. Remember, when you delete a flex field, the associated data in that field is deleted and can not be recovered.

The import and export buttons will allow you to import or export a group of fields all at once. This allows you to exchange field definitions with other databases, our support staff or even other churches.

Positioning Flex Fields

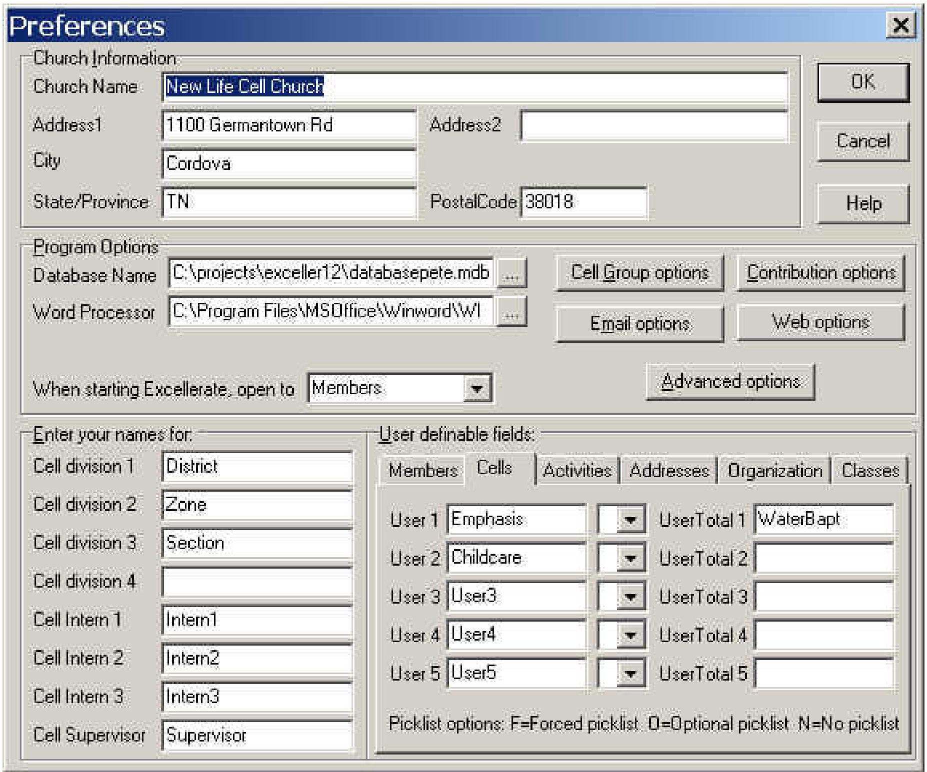
Once the fields have been added, you can go to the member, or cell screen to re-position them. To position the fields, right-click on any of the flex fields. They will all turn red indicating they can be moved. Simply drag the field to the correct position. When all of the fields are in the correct position, right-click one of them to save. You can move several fields at the same time, by shift - right-clicking a field. Enter the number of fields to select, then drag them. Shift - right-click again and reset the count back to 1.

Exporting Flex Field Data

To export the data in flex fields, you must first modify the export maps such as website.map, or default.map and add the flex field entries to that file. You can use notepad to edit those files.

Preferences

The preferences screen, found in the Options menu, allows you to customize the behavior of the program.



Church Information – Enter your church name and address information. This information will appear on reports and other printouts from the program.

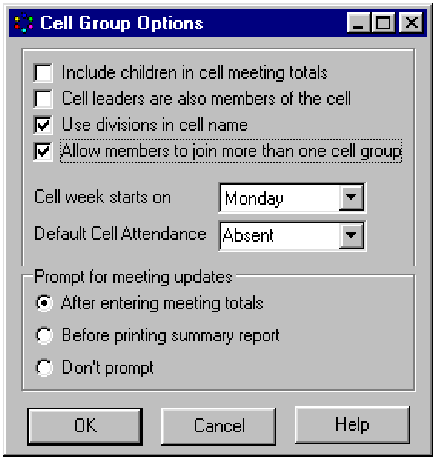
Database Name – You can create several databases within Excellerate. This is useful if you want to have a training database separate from your main database, or for keeping multiple congregations separate form one another. The Database Name option allows you to specify which database to automatically open when starting Excellerate. Typically this would be your database.mdb located in the directory where you installed Excellerate, but if you are using the network version, this will be the database on your file server. (This is a local option that only affects this workstation)

Word Processor - If you would like Excellerate to automatically start your word processor for mail merges, enter the full path to your word processor. (This is a local option that only affects this workstation)

Open To Module – Specifies the module that you want to see first when the program is started. This may vary from person to person, depending on their job duties. (This is a local option that only affects this workstation)

Cell Group Options:

In the Cell Group Options screen, you answer several questions about how your cell groups are organized:



If you want children included in your cell group meeting totals, then check the first box. There is a separate total for children as well, but if you want them totaled with the member and visitor counts, then select this option.

If your cell leaders are considered members of the cell they lead and should be counted there as members, then check the second box. A member may be a leader of as many cell groups as they want.

If you wish to have your cell groups named by the combination of divisions they represent, then check the third box in this section. For example, if Matt is a cell leader in District 1, Zone A, Section 5, Cell B, then you may choose to name his cell "1-A-5-B." In this case you would check the "use divisions in cell names" box. If you don't want the divisions included in the cell name, for example, names like "Teen Life" or "Matt's Cell," you would leave the third box unchecked.

What is a division? Essentially, “division” is the generic term used in Excellerate to describe the levels within your cell structure, such as District, Zone, Section, or Network, Generation, 144, etc… in the case of G12. Some churches may include Campus, or part of the city as one of their divisions.

If you wish to allow your members to join more than one cell group, check this box.

The next field in this section allows you to specify the day of the week that your church has designated as the beginning of the cell week. This may differ depending on the specific situations of each church. This option is used when displaying the pop-up calendars for entering dates referring to cell weeks.

You can also specify how you want to default the cell member attendance. You can choose to default member’s attendance to Present, Absent, Use last weeks attendance, or to turn off cell attendance.

The Prompt for meeting updates option specifies when you would like the program to remind you to run the update for cell meeting totals.

In order to be able to track your churches cell growth, you will enter weekly cell meeting totals into the system. This usually consists of entering the number of members, visitors, etc… for each cell. You must also record that certain cells did not meet, or did not turn in a meeting report. The update for cell meeting totals option goes through your list of current, active cells (after you’ve made any cell information changes and entered your meeting totals) and makes sure you’ve made an entry for each cell. If not, the update will automatically make an entry for you indicating that the cell did not turn in a report. You can then print a list these cells if you need to follow-up with them. It is OK if some cells don’t turn in a report, but the system must have an entry for each cell every week, and the update ensures this.

Contribution Options:

Before using the contribution module, you should verify several program options within Excellerate to ensure they are set according to your church operation. See the section on setting up contributions in the contribution chapter of the manual.

Email Options

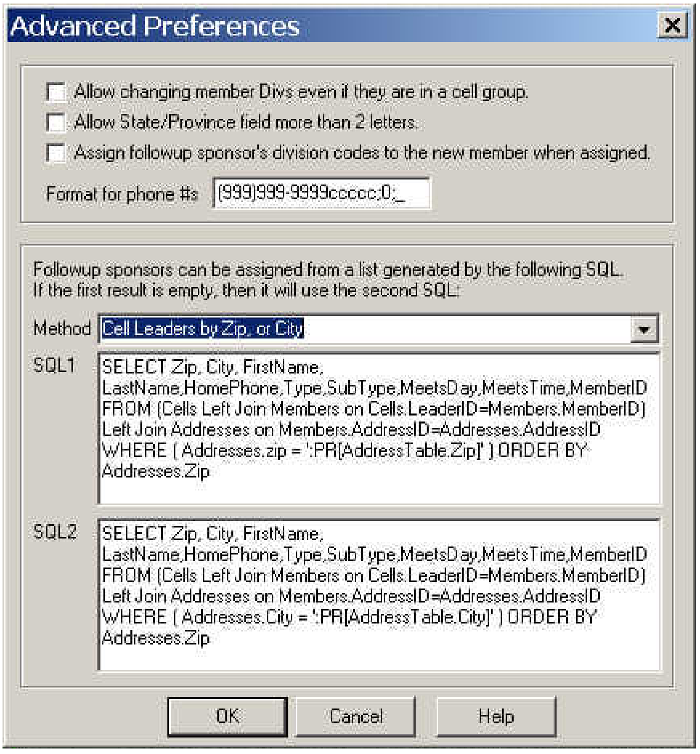
Excellerate has the ability to send email messages. You will need to have an SMTP outgoing mail server to take advantage of this feature. See the section on setting up email in the Internet Integration chapter of this manual.

Web Options

The web integration feature allows you to integrate data from Excellerate with your church web site. See the section on Setting up Web Integration in the Internet Integration chapter of this manual.

Advanced Options

The following advanced options can be configured



Allow changing member Divs if they are in a cell group – Normally a member's division codes are automatically determined by the cell group they belong to, or are manually entered when they are not in a cell. This option allows you to modify a member's divisions even if they have joined a cell.

Allow State/Province field more than 2 letters – this option allows entering full state or province names instead of the US 2 char abbreviations.

Assign follow-up sponsor's division codes to the new member when assigned – When a new visitor is assigned to a follow-up sponsor, Excellerate can automatically assign that visitor the same divisions as the sponsor who is following up on them.

Follow-up sponsor list generation – For large churches, Excellerate can automatically generate a list of possible follow-up sponsors that can be assigned to a new visitor based on certain criteria such as geographical location. This is done with two SQL statements which can be customized to work the way your church operates. The first SQL statement gets executed, but if it does not return any potential sponsors, the second SQL statement gets executed. There are several default follow-up methods which can be selected, or custom SQL can be entered directly.

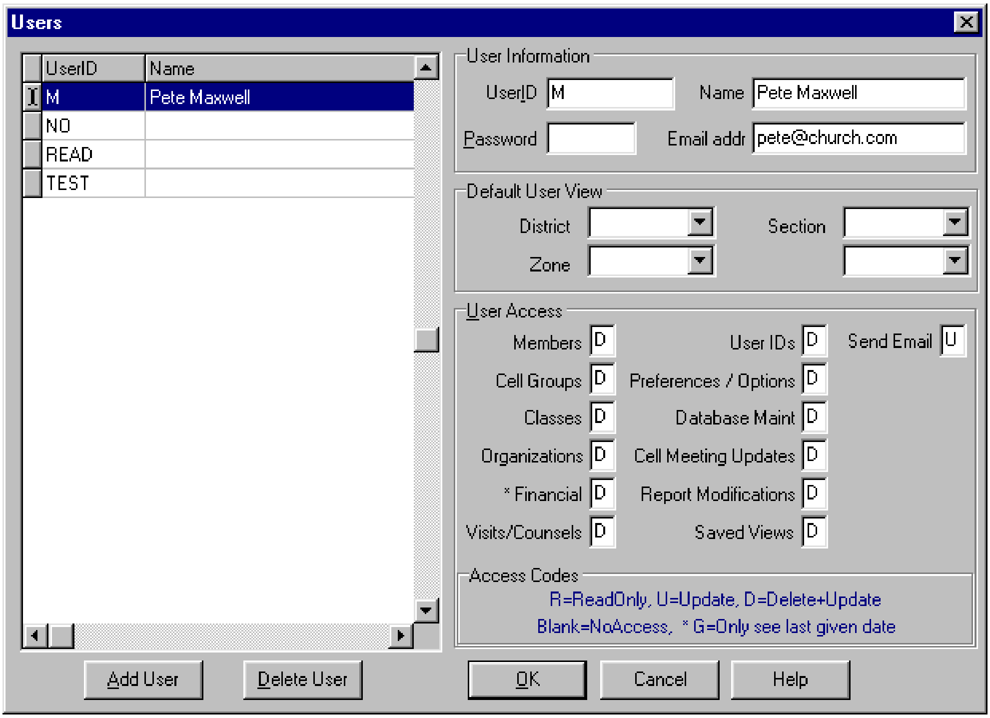
The other sections in the preferences screen are:

Enter your names for – This section will allow you to specify your choice of names for your cell divisions, cell interns, and cell supervisors. Cell divisions refer to the method you use to organize your cell groups. For example, you may divide your area or city into Districts, Zones, and Sections. For larger organizations, it may be necessary to label the divisions as Congregation, District, Zone, and Section, for example. Enter your names in the four division fields starting with Division1 as your biggest division. It is not necessary to use all of the available fields for divisions. If your church has two divisions, simply leave the other fields blank. The "cell" designation does not need to be specified here, that field is always labeled "Cell." For example, for cell group "1-A-5-B", which stands for District-Zone-Section-Cell, only specify Div1 = "District," Div2= "Zone," Div3=" Section." The Cell identifier is recorded in a separate field within the cell group file. The program also allows you three fields for naming cell intern types, which gives your church the flexibility to have several intern types, such as a cell intern, a worship intern, possibly a youth intern. The final designation is for a "cell supervisor," or an individual that acts as manager or overseer of another cell. This might be helpful for your children's pastor, if you have children's cells. Those cells may be overseen by the District and Zone pastors in one way, but also by the children's pastor in another.

User Definable Fields – Although Excellerate is designed to track many aspects of your church members, cells, classes, and organizations, there may be items specific to your church that are not already included in the program. This section allows you to specify your names for the user-defined fields throughout the program. You may want to know if a member has any pets, for example, and could designate the Members User1 field as Pets. The user fields can be setup as regular text entry fields, or picklists. To specify that a user field is a picklist, select the appropriate picklist type next to the user field. For example, ‘F’ means forced picklists, or that the user can only choose a value from the picklist. ‘O’ means optional picklist, so the user can choose an item from the list, or type in their own. ‘N’ means no picklist. See Picklists under the Preferences menu option for setting up values for your picklists.

Users and IDs

As with the Preferences screen, this screen is located in the Options menu.



This screen allows you to enter all of the users of the system, their email address, their default view, and their levels of access.

Default User View

Users can be assigned a default view, which can narrow their view of the database to the area they’re interested in. For example, your church may have several district secretaries, and each of them can set up their program to open to the view that they use the most, (such as District One for the District One secretary). When a user has a default view assigned, that becomes their initial view when they start the program. They can always choose another view at any time. If a default view is not specified for the user, then they will see all records when the program starts.

User Access

To allow or disallow users from viewing or modifying different types of information within the program, you assign them access codes. Access codes provide different levels of access to different areas of the program. For example, to allow a user full access to member information, give them a **D** for member access. The **D** code allows deletions and updates. The **U** code allows updates only, and the **R** code allows read only. A blank prevents access to that area of the program.

SUMMARY OF USER ACCESS AREAS:

ACCESS AREA	ACCESS CODE
Members	Member and related information
Cell Groups	Cell groups and related information
Classes	Classes and attendees
Organizations	Organizations and their members
Financial	Member contribution information
Visits / Counsels	Meetings or counselings with members
User IDs	Maintaining User IDs
Preferences / Options	Program preferences, picklists, and defaults
Database Maintenance	Re-indexing or Compacting the database. Purging deleted members from system.
Cell Meeting Updates	Ability to run the cell meeting update
Report Modifications	Ability to change report styles
Saved Views	Ability to change saved views of the database
Send Emails	Ability to send emails

SUMMARY OF USER ACCESS CODES:

TYPE OF ACCESS	ACCESS CODE
Read-only	R
Update	U
Delete and update	D
Only allow seeing a member's last giving date	G (applies to financial area only)
No access	Blank

The following options require Delete and Update access in the financial area: change accounts, reset or reverse-update contributions, end of period processing

Remember to change the MANAGER password at some point. This ID defaults to full access to the system for setting up users, etc…

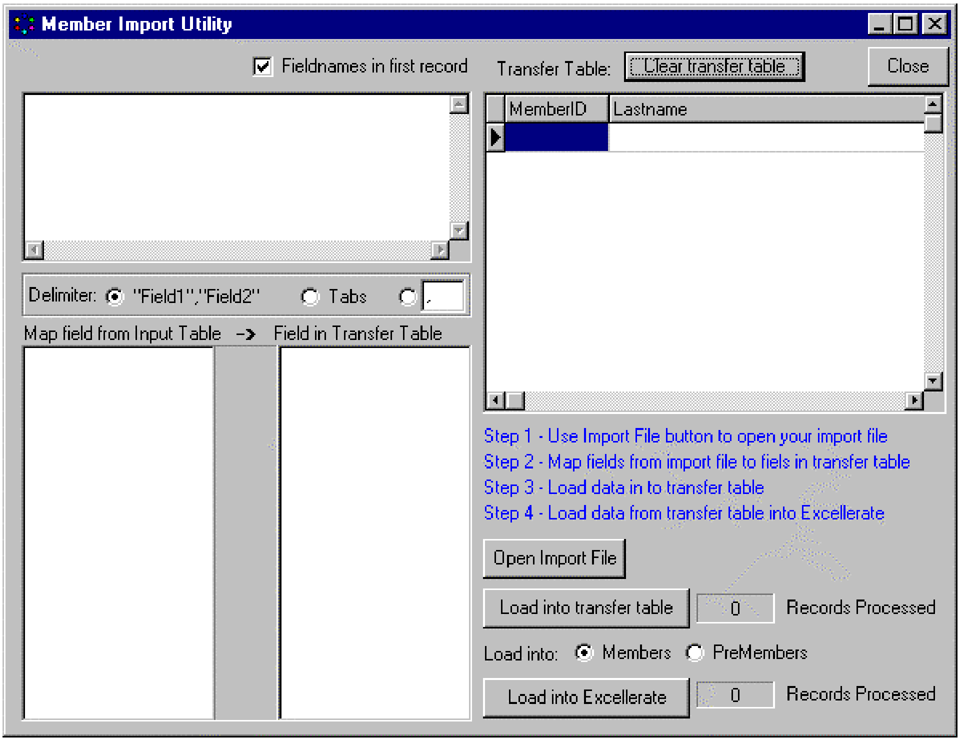
Here's an idea… Consider setting up a "STAFF" User ID, without a password, which allows read-only access to Members, etc, This allows staff members to log on quickly to access basic information, such as phone numbers and addresses.

Importing and Exporting

Importing

When starting to use any new database program, it can be a time consuming task to hand-enter your data, especially names and addresses. Therefore Excellerate has provided a generic member import utility that will allow you to import member information. If you already have your member information in another database, you could export it from that database, and import it into Excellerate. To import members and their addresses into Excellerate, first export them from your database in such a way that there is one record per member that contains the member information and their address. This can be in an Access database, or text file. If using a text file, a quoted, comma delimited format is preferred. You may be able to use other formats such as tab-delimited, depending on how your database exports the information.

To import the data into Excellerate, use the Import Members utility under the File menu:



As you can see from the instructions on the screen, this is a four step process.

Basically you are importing the data from your file into an intermediate Excellerate file. Then you can view this data to be sure it imported correctly before loading it into Excellerate.

Step 1 – Use the import File button to open your import file. Once your file has been opened, Excellerate will display the fields in the field list, and the first few lines of data in the import preview window.

Step 2 – Map the fields from your import file to the fields in the transfer database. This is done by clicking the field in the import list, then finding the matching field in the transfer list, and clicking it. You will notice a line drawn from field to field showing the map. Continue with this until all desired import fields are mapped.

Step 3 – Load data into transfer table. This is done by using the Load into transfer table button.

Step 4 – Load data from transfer table into Excellerate. Once you've check the data in the transfer table window, and have verified that it imported correctly, you can then use Load the data in to Excellerate. You have a choice of loading the data into the Member or Pre-Member module. If you have a lot of data in your old database that needs cleaning up, you could transfer everything into the Pre-Member, then go through and move the current members into the Member module.

Note – If the data in the transfer table window does not look the way you want. You can clear the table and try again by using the Clear Transfer Table button.

Exporting

To export data from Excellerate, simply choose the module and view of the data you wish to export, and choose Export under the file menu. This will look similar to the Mail Merge screen since they both basically do the same thing. You can choose to exclude members with a mail code if desired, and you can specify the format of the export table as either text, or Access.

When exporting, you can choose a map file to use to map Excellerate fields to other names, or to exclude fields. Excellerate comes with a map file for exporting your members to Microsoft Outlook, then even to your hand-held computer or PDA!

To export contributions, see that section in the chapter on contributions.

Importing Church Attendance with Barcodes

Tracking church attendance for a large number of people can be difficult and time consuming. One way to speed up that process is to use barcodes and scanners. Excellerate can print barcodes for your members in many formats including cards, nametags, lists, etc… Then, you can simply scan their barcode to track their attendance. This can be used for tracking any type of church service, most commonly, Children's Church. Excellerate's church attendance system can track the service, date, time-in and time-out. Or, you can just record their attendance without times.

Excellerate currently supports the CS2000 handheld scanner from Symbol Technologies. This is a portable scanner that can read several hundred scans at once. Then the scanner is placed into its cradle and the data is read into Excellerate.

The first step in using the Church Attendance with Barcodes feature, is to choose how you want to print your barcodes. Use the Members Lists/Labels report to select a report style that includes barcodes, or modify one of the existing styles to add the barcodes. To add the barcodes to a report style, simply add a text field to the report with the following value:

BARCODE15:I+MemberQuery.MemberID

This value tells the report to print a check-in barcode for the MemberID. You can also print a check-out barcode if you are interested in tracking check-ins and outs.

BARCODE15:O+MemberQuery.MemberID

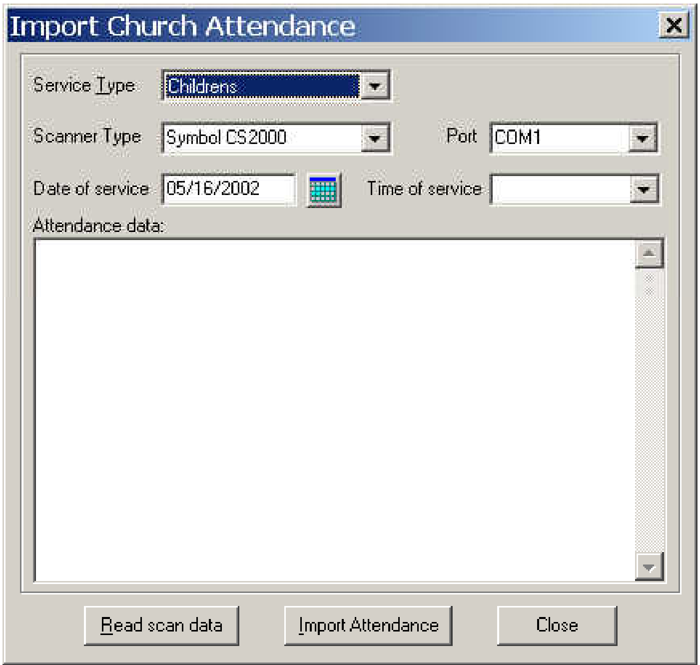
This will print a check-out barcode. (Note the letter O, not zero.)

(Also, see Report Styles in the Appendix for more information.)

Before printing your barcodes, choose a view to select the members you are interested in, or you can print for all of your members.

Now that you have your barcodes printed, you can scan the codes as each person attends using the check-in barcodes. If you want to track the check-outs as well, then you would scan the check-out barcode as the person leaves. You do not have to use the check-out barcodes if you are not interested in time-in and time-out.

Once the barcodes have been scanned, place the scanner into its cradle, and use the File, Import Church Attendance menu option.



From this screen, choose the service type for which you want to import, then select your scanner. Currently only the Symbol CS 2000 is supported. Select the COM port that your scanner cradle is connected to. Also, enter the date of the service as well as the time, if you are interested in tracking the time. You may leave the time blank.

Next, hit the Read scan data button to read the scanner. You should see the attendance data listed in the window. If you do not see any attendance data, then either the scanner is empty, or the scanner is not connected correctly to your computer. Make sure the COM port you chose is the correct one. After the attendance data appears, hit Import Attendance to import that data into Excellerate.

You should now see church attendance records in the member's edit screen, and should be able to use views and reports to analyze the information.

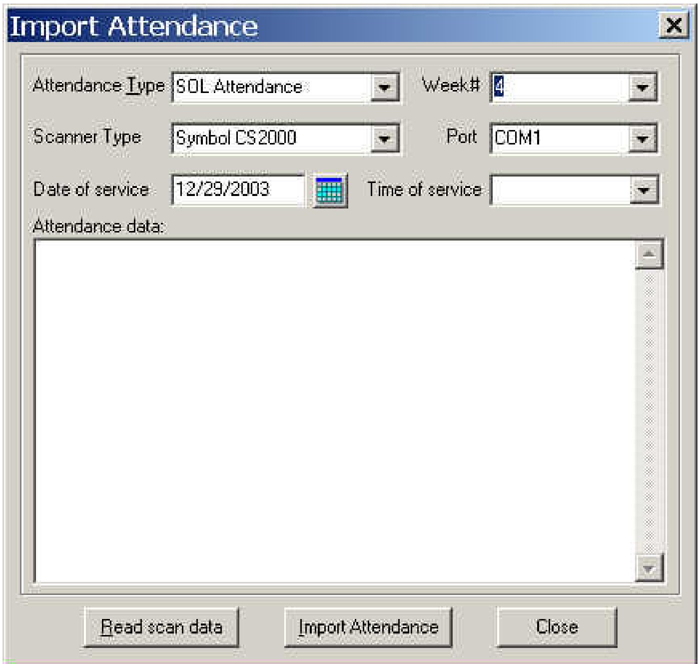
Importing Post-Encounter / School of Leaders Attendance with Barcodes

Class attendance for the Post-Encounter / School of Leader classes can be tracked using barcodes. The process is the same as for church attendance which is to print out the barcodes using the included report style “SOL sign-in sheet with barcodes”, then as the students attend the class, scan the barcode next to their name on the sign-in sheet. Other styles could be created such as bar-coded name tags, etc…. The barcodes will contain the MemberID and the ClassName, so you can scan several different classes at the same time.

When creating new barcode report styles, the barcode field must be:

BARCODE15:STR(MemberQuery.MemberID)+'-
'+MemberQuery.FF_CurrentSchool

Once the names have been scanned, connect the scanner to the Excellerate computer, and use the “Import bar-coded attendance” option in the File menu. You must select the week # that you are importing.



Next, hit the Read scan data button to read the scanner. You should see the attendance data listed in the window. If you do not see any attendance data, then either the scanner is empty, or the scanner is not connected correctly to your computer. Make sure the COM port you chose is the correct one. After the attendance data appears, hit Import Attendance to import that data into Excellerate.

Excellerate currently supports the CS2000 handheld scanner from Symbol Technologies. This is a portable scanner that can read several hundred scans at once. Then the scanner is placed into its cradle and the data is read into Excellerate.

Appendix

Browse Columns

The column arrangements for the browse screens in the different modules can be modified by right clicking in the browse. A menu will appear allowing you to add new columns, delete columns, load other layouts, or restore the default columns.

Member Pictures

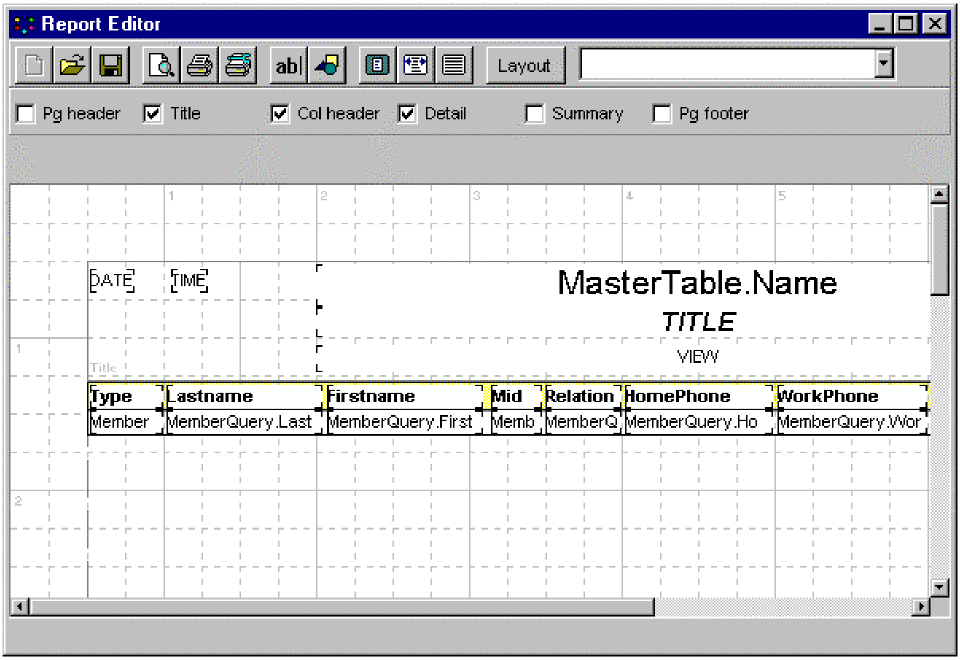
Member pictures are not stored in the database. This would increase the size of the database to an unmanageable size. Therefore the pictures are stored in a directory having the same name and location as your database, with the word '_Pictures' appended to the end of it. This is would usually be called: **C:\Program Files\Excellerate\Database_Pictures** unless you installed Excellerate into a different directory, on a network, or used a different name other than Database, for your database.

The pictures are named the same as the member number they identify. So member with Member ID 100 could have a picture stored in the pictures directory called 100.BMP or 100.PCX, etc…. Excellerate can read the following formats:
PCX, BMP, TIFF, and JPEG file formats. For TIFF, and JPEG, use the following file extensions: TIF or JPG.

When acquiring member images with a scanner or digital camera, save them in Excellerate's pictures directory.

Report Styles

Report styles allow you to choose different styles or layouts for a report. For example, a Member list report could look like a mailing list, or a contact list, or even labels. To create a new report style, choose the new button on a report screen that uses styles. You see the report editor screen with a default or blank report style:



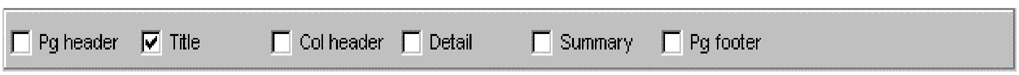
The report editor screen allows you to:

Choose the layout for your report
Choose the data to include in your report
Place text, shapes, data fields on your report

A report is made up of several different horizontal bands. A band can hold text labels, data fields, or shapes, and appears on specific parts of the report:

The Page header band is printed at the top of each page.
The Title band is printed on the first page only.
The Column header band is printed on each page before the list of records
The Detail band contains the fields for each record that is printed
The Summary band is printed at the very end of the report
The Page footer band is printed at the bottom of each page.

The Band toolbar allows you to select which bands or sections to include on your report:



Simply check the bands you wish to include in the report, and they will appear in the report editor. Careful! – When you uncheck a band, it will remove the band and all items contained in the band.

Child Band

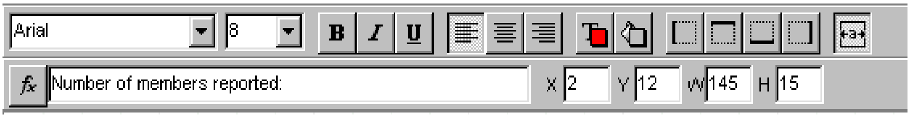
One other band type is available when you have a detail band on your report. If you select a detail band, you will see an option in the toolbar called "Has Child". This indicates whether or not the detail band has an attached child band. A child band can be a band that contains fields from one of the associated tables, in which case the band will repeat for every associated record for that particular member. For example, if the detail band was reporting member information, such as name, phone, etc… you could add a child band that could list each of the member's profile codes, or member steps, etc…

Group Bands

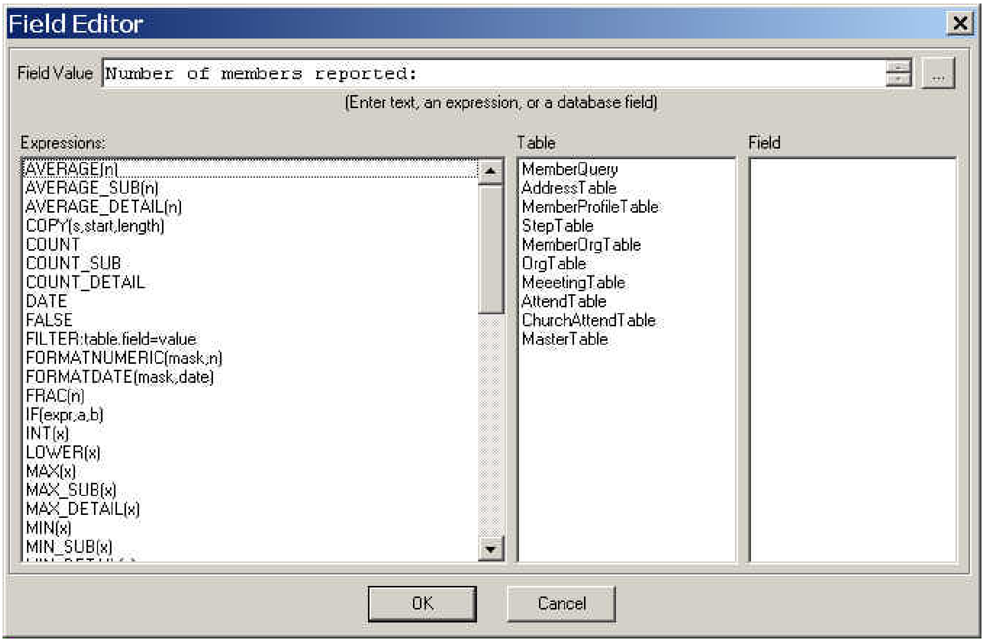
The other use for a child band is to group. To set up a grouping, give the detail band a child band. Then select the child band. In the toolbar, you will see other options to specify if this child band is the Header, or Footer. Choose Header, and you will then see the "Group Expression" field appear. This field tells the report what to group on. If you wanted to group on MemberType, you would put MemberQuery.MemberType in this field. You would use the same fields and expressions as you would with any data element that you could place on the report. Now you can place any group heading fields in the band. To add a group footer, which could contain group totals, select the header child band, and select the "Has Child" option. A new child band will be created. To make it the footer, select the band, and choose the Footer option. You can have several grouping levels. The next group level would be created from the previous group footer band, by choosing "Has Child".

Text labels or data fields are placed in the report by using the  button in the report toolbar:

Click the  button then click on the report where you want the text element to appear. A new text element will appear on the report indicated by the word [none]. Use the text toolbar to specify what you want to appear in that element:



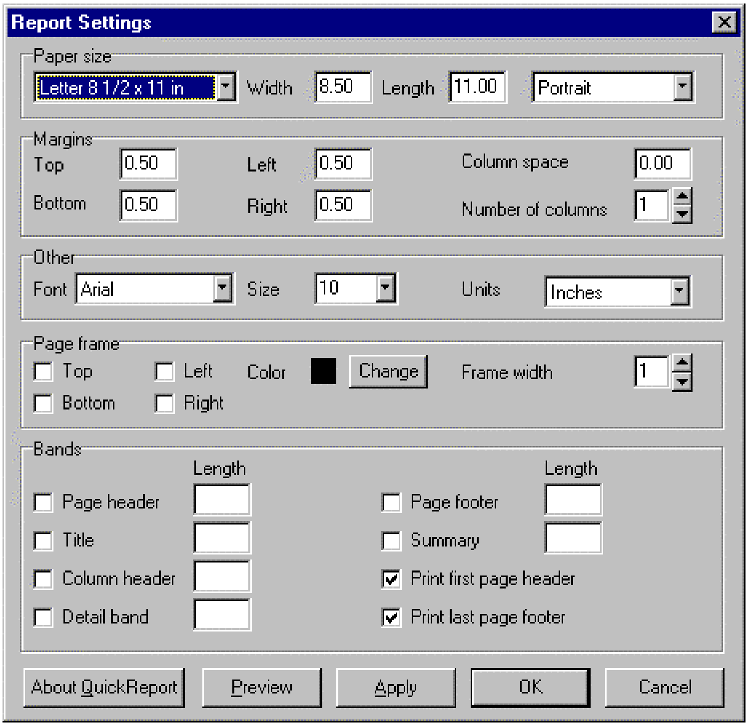
For example, if you want a label to appear such as “Number of members reported”, then simply type “Number of members reported” in the text box of the toolbar. If you want a data field to appear in the element, type the name of the data field, or use the expression button to choose the data field. Special functions can also be used to display certain information, such as PAGE for the page #, or COUNT to count the number of records. A complete list is displayed in the Field Editor screen when you hit the expression button.



There are many different expressions that can be used, so the best way to decide what expression to use is to look at another report that is doing the same thing you are trying to do.

Two functions use special masks to format a field: **FormatDate(mask,date)**, and **FormatFloat(mask,n).** See the program’s built-in help for the mask specifiers.

The Layout button in the report toolbar is used to select the paper size, orientation, columns, and other layout options:



When your satisfied with your report design, save it, and give it a descriptive name. These reports will be available for other users if you are using the multi-user network version.

Backing Up

To backup your Excellerate data, use the Microsoft Backup Utility that comes with all versions of Windows. You can access this utility from your Start Menu, then Accessories, then System Tools. If the Backup menu option does not appear, then you may have to install it from your Windows Installation CD.

All of your Excellerate data is located in the one database file you created when setting up Excellerate. This file will end with an MDB extension. The default choice is DATABASE.MDB, but you may have chosen another name. You can always see what your database file is called by looking at the title bar on the top of your Excellerate screen.

For the most part, the database will be the only file you need to backup. If you have created or modified your own reports, then those files should be backed up as well. Reports are those files ending in .QR.

Technical Support

Micro System Design offers free technical support through email and our online resources. See or web site at www.excellerate.com. Our complete annual support plan includes free software updates, telephone support including help with designing and modifying reports, and a subscription to our newsletter. Our data conversion service can convert data from your existing systems.

Our support phone number is **901-754-0315.** Contact us at 888-371-6878 for more information about these services.