

# PARISH MANAGER

## 18

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## 1 INTRODUCTION

Parish Manager (referred to as PM throughout this User Manual) is a web-based application to assist in Church Management. Users log on via the Internet using their Web Browser.

Access to PM is by multiple users, each with a their own User Name and Password. Each user is allocated to one of four access levels. These will allow Full, Write Limited, Read All, or Read Limited access to the data files. Each user can be restricted as to which information they can access about people known to PM. This manual is written assuming the user is logged in with Full access.

Basic knowledge of the operation of FileMaker Pro will be helpful to the user, particularly the find functions. An excerpt of the FileMaker Pro documentation is found in section 4.1

## 2 MAJOR FUNCTIONS

### 2.1 Information about People

PM takes an integrated approach to all people that are entered into the database. Regular members, visitors and those preparing for baptisms, weddings and funerals are all incorporated into the database of people known to PM. Hence the find function will be applied to all known people.

Each person is defined to be a member of a family. The family shares the common information of address, home telephone, and family status. When this information is changed for one member of the family, the change is effective for all members of the family.

Required information such as Safe Ministry Training completed and Working With Children Check (WWCC) verifications can also be stored for each individual and used to trigger necessary alerts.

#### 2.1.1 Names, Addresses and Contact Details

The basic information of surname and address is held for each family, and the individual's contact details (work, mobile, email, etc.) are held for each person.

#### 2.1.2 Group Memberships

Each individual can be noted as a member of multiple groups, as attending multiple church services, and taking multiple ministry roles. The groups, church services and ministries are defined by the user. Attendance records for each member of each group or church service can be kept and used for pastoral follow up.

#### 2.1.3 Pastoral Care

Attendance records for each individual can be held and used to trigger suggestions for individuals to be followed up should their attendance show a declining trend.

Follow Up records can be kept, including an unlimited number of Pastoral Notes per individual, helping to track the "Who, What, Where, When & Why" of follow up interactions.

## 2.2 Information about Sunday Services

Details of who is allocated to lead, preach and celebrate at each Sunday Service can be noted and combined with the order of the particular service, music selections, sermon topic and readings.

Other roles such as Bible Reader and Prayer can be filled in manually as well or incorporated from the automated rostering function of PM.

## 2.3 Rostering of People to Tasks

Once the Sunday Services are defined, including which roles are to be rostered for each service, each individual can be noted as volunteering for the particular roles. With this done and the records for each of the services to be rostered have been made, PM can be requested to fill in up to 20 rosters per service (or group). Conflicts and absences are noted and avoided.

*2.4 Section removed version 13*

## 3. LOGGING IN

Normal log in is as a **web user**. Enter the following URL into the address field of your Browser (i.e. Internet Explorer, Safari, Chrome ..),

<https://parish-software.com>

then click on the link

PARISH MANAGER

Enter your Account Name and Password. You will be logged into PM with the access level determined by the Account Name and Password.

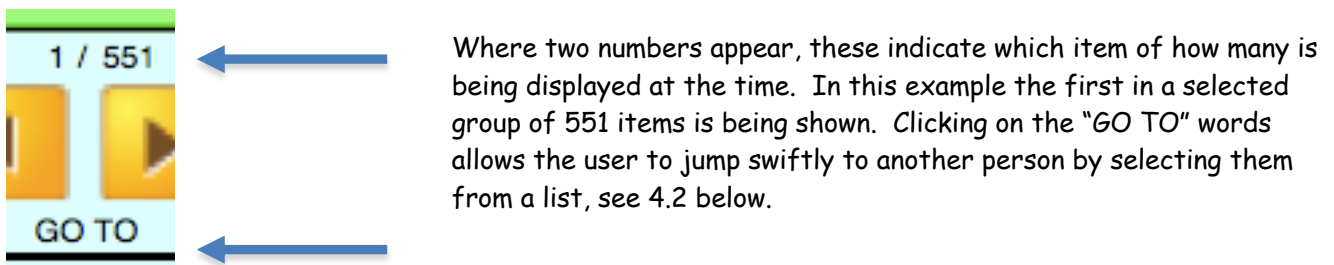
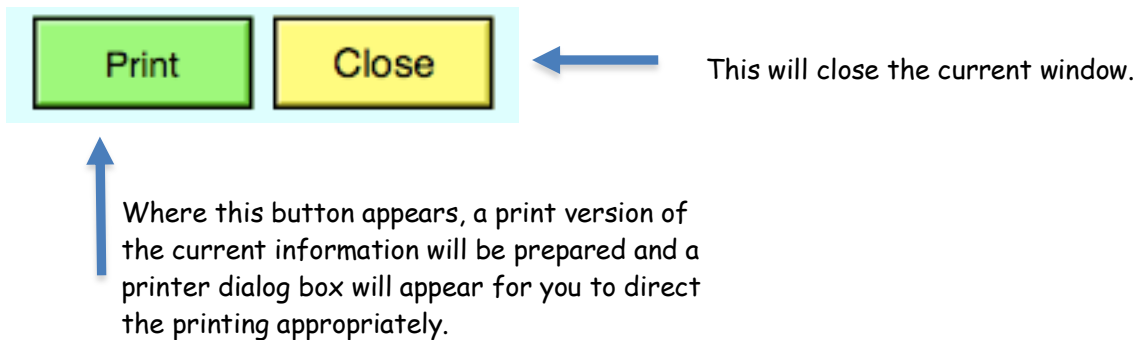
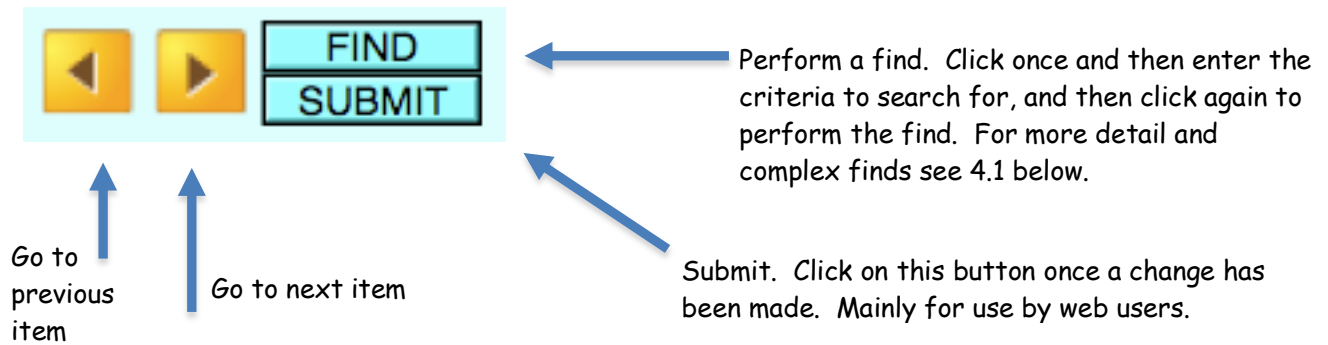
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To log in using FileMaker Pro (as a **network client**),  
double click on the file      Start PM as Client  
in the directory/folder      Start Parish Manager

Enter your Account Name and Password. You will be logged into PM with the access level determined by the Account Name and Password.

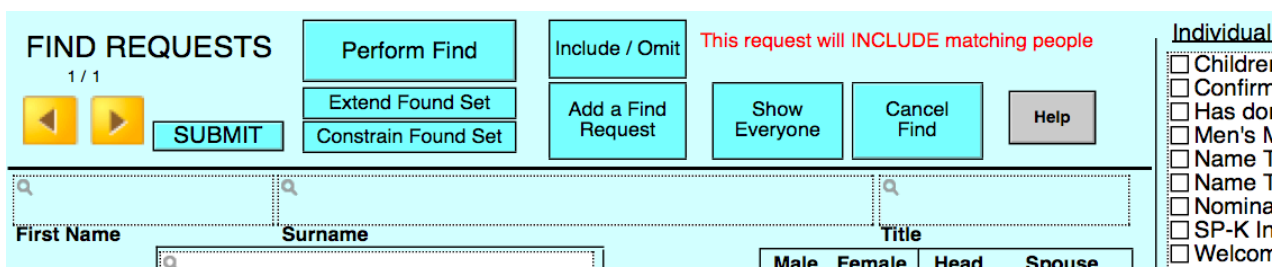
## 4. GENERAL CONTROLS

Navigation through the PM functions is achieved by clicking on the button objects on each display screen. There are several buttons that appear on most screens.



### 4.1 Finding a desired set of people

When the "FIND" button of the Person screen is clicked, PM Displays an empty Person display, with a different set of buttons. These allow the user to perform complex find operations.



## Finding records (People)

To find particular people in your database, you can make a find request in Find mode

### Making find requests in Find mode

When you perform a find in Find mode, you type *criteria* (the value or values to find) into fields in a *find request*, which looks like a blank record. FileMaker Pro searches through all the records in a table, comparing the criteria you specify with the data in the table.

Records with data matching the criteria become the *found set*, which is the subset of records being browsed. Records that don't match are omitted. You can constrain (narrow) or extend (broaden) the found set in Find mode.

You can work with just the records in the found set. For example, you can view, edit, calculate summaries for, sort, print, delete, export, or replace data in these records.

To make a find request

1. Enter Find mode, by clicking FIND on the Person Screen

2. In the find request, select a text, number, date, time, timestamp, or calculation field to use for finding, and then type a value in the field.

You can click **Include/Omit** to exclude records matching a specific set of criteria.

3. Click **Perform Find**.

Your find request returns a found set of records.

### Finding text and characters

Search for text in text fields, or in calculation fields that return a text result.

Unless you search for phrases and exact matches, the field can contain other values in addition to the one(s) you specify, and the values can be in any order. For example, typing `hotel` in a field named Accommodation finds records for **Hotel**, **Discount Hotel**, and **Hotel, Luxury**.

To find	Type this in the field	Examples
Words that start with specific Roman characters (works with fields that use any language except Japanese)	The characters	Chris Smith finds <b>Chris Smith</b> , <b>Smith Chris</b> , <b>Chris Smithson</b> , and <b>Smith Christenson</b>
Words that start with Japanese Hiragana, Katakana, or Kanji characters	The characters between = and *	=小田* finds 小田, 小田山, and 小田川
A phrase or sequence of characters that match when they are the first characters in a word (match phrase from word start)	The literal text (characters), including spaces and punctuation, between double quotation marks ("")	"Marten and Jones Interiors" finds <b>Marten and Jones Interiors</b> but not <b>Jones and Marten Interiors</b> ", Ltd." finds all companies with " <b>Ltd.</b> " in the name, but not those without the comma "Spring" finds <b>Springville</b> but not <b>ColdSpring Harbor</b> or <b>HotSpring</b>
Words with one or more unknown or variable characters (any one character)	One wildcard character (@) for each unknown character	Gr@y finds <b>Gray</b> and <b>Grey</b> @on finds <b>Don</b> and <b>Ron</b> but not <b>Bron</b>

Invalid characters in a text field	?	Invalid characters display as blank characters <b>Note</b> To find the ? character, search for "?"
Digits in a text field (any one digit)	A # character for each digit	# finds 3 but not 30 ## finds 30 but not 3 or 300 #3 finds 53 and 43 but not 3
Words with zero or more unknown or variable text characters in a row (zero or more characters)	* for all unknown characters	Jo*n finds Jon and John J*r finds Jr. and Junior *phan* finds Phan and Stephanie
Operators or other non-alphanumeric characters, such as punctuation or spaces	The literal text (characters), including spaces and punctuation, between double quotation marks ("")	"@" finds @ (or an email address, for example) ", " finds records containing a comma " " " finds three spaces in a row
A character with special meaning, such as the find operators recognized by FileMaker Pro: @, *, #, ?, !, =, <, >, " (escape next character)	\ followed by the special character	\ "Joey\" finds "Joey" joey\@abc.net finds the email address joey@abc.net
Words with accented characters	The literal text (characters), including spaces and punctuation, between double quotation marks ("")	"òpera" finds òpera but not opera (òpera without quotation marks finds both òpera and opera)
Partial phrases, a sequence of words or characters (match phrase from anywhere)	Characters, punctuation, and spaces between double quotation marks (""); use * to find this text in the middle of a longer text string	*"son & Phillips" finds Johnson & Phillips and Paulson & Phillips
<b>To find</b>	<b>Type this in the field</b>	<b>Examples</b>
Exact matches of the text you specify (match entire field)	== (two equal signs) for a field content match	==John finds John but not John Smith ==John Smith finds John Smith but not Smith, John or John Smithers
Exact matches of whole words you specify (match whole word)	=	=Market finds Market, Market Services, and Ongoing Market Research but not Marketing or Supermarket =Chris =Smith finds Chris Smith or Smith Chris but not Chris or Christopher Smithson
Words that contain Japanese Hiragana, Katakana, and Kanji characters (Japanese-indexed fields only)	The characters	京都 finds 京都, 東京都, and 京都府
Kana characters in a Japanese-indexed field without differentiating between Hiragana/Katakana, Voiced/Semi-Voiced/Unvoiced Kana, Small/Regular Kana, and Kana Voiced/Unvoiced Iteration Marks	~ (tilde) and the character, to do a relaxed search	~は finds は, ば, ぱ, ハ, バ, and パ
Ranges of information	See "Finding ranges of information" on page 36.	



## Finding numbers, dates, times, and timestamps

When you enter criteria in a find request, numbers, dates, times, and timestamps should be entered in the corresponding field types (or calculation fields returning the corresponding field type) to ensure correct behavior when finding them. See “About choosing a field type” on page 57.

**Important** To avoid confusion when working with dates, always use four-digit years. For more information, see the Help topic “Conversion of dates with two-digit years.”

To find	Type this in the field	Examples
A number in a number field or in a calculation field that produces a numeric result	The number	.50 finds .5, .50, and \$.50
A Boolean number in a number field or in a calculation field that produces a Boolean result	1 to find True values 0 to find False values	1 finds 1 0 finds 0
To find	Type this in the field	Examples
A date in a date field or in a calculation field that produces a date result	The date as digits, separated by a valid date separator character (such as a slash or hyphen)	3/3/2014 finds 3/3/2014, March 3, 2014, and 3-3-2014
Today's date in a date field or in a calculation field that produces a date result	//	// finds April 4, 2014 (when the current date is 4/4/2014)
A time in a time field or in a calculation field that produces a time result	The time as digits, separated by colons	12:53:09 finds 12:53:09
A timestamp in a timestamp field or in a calculation field that produces a timestamp result	The date as digits, separated by a valid date separator character, then the time as digits, separated by colons	3/3/2014 12:53:09 PM finds 3/3/2014 12:53:09 PM
Invalid dates, times, timestamps, or calculated date or time results	?	? finds Next Tuesday or 2/33/2014 in a date field, or midnight in a time field
Invalid data (fields containing no numbers) in a number field or calculation field that produces a numeric result	?	? finds twelve but not 12 or twelve30
Dates on a day of the week in a date or timestamp field	The day of the week <b>Note</b> Full or short day names (for example, Friday or Fri) are acceptable in day of week searches.	Tuesday finds all dates that occur on a Tuesday =Thu finds all dates that occur on a Thursday
Any valid value for a date or time component in a date, time, or timestamp field	* or leave component unspecified, while specifying the other components you want to find	3/3/* finds the 3rd day of March in any year *:15 finds times that are 15 minutes after any hour 1/1/* 7 PM finds timestamps in the 7 o'clock hour on January 1st in any year <b>Note</b> When the year is unspecified, the current year is assumed. 3/3 finds the 3rd day of March in the current year
Ranges of information	See the next section, “Finding ranges of information.”	

## Finding ranges of information

To find values that are	Use this operator	Examples
Less than a specified value	<	<40 <9/7/2014 <M
Less than or equal to a specified value	<= or ≤ (Mac OS)	<=95129 ≤05:00:00 <=M
Greater than a specified value	>	>95129 >9/7/2014 >M
Greater than or equal to a specified value	>= or ≥ (Mac OS)	>=100 >=9/7/2014 ≥8:00 ≥M
Within the range you specify. A range is different based on the data type: <ul style="list-style-type: none"> <li>Numbers: least to greatest</li> <li>Dates and times: earliest to latest</li> <li>Text: first to last word, based on the index order of words (not the sort order)</li> </ul>	.. or ... (two or three periods)	12:30...17:30 1/1/2014..6/6/2015 5 A...M

To find dates	Type this in the field
In June 2014	6/2014
From July 2014 through October 2015	7/2014...10/2015
That occur on a Friday	=Friday
From the 10th through the 16th of October or November 2014 (if the date format is MM/DD/YYYY)	{10..11}/{10..16}/2014

To find times	Type this in the field
In the 3 o'clock hour, not including 4:00 PM	3 PM
Between 8:00 AM and 8:59:59 PM	8 AM..8 PM
In the morning	AM
Any of the times 4:30, 5:30, 6:30 PM	{4..6}:30 PM

To find timestamps	Type this in the field
In the 3 o'clock hour today	// 3 PM
In the 7 o'clock hour in May 2014	5/2014 7 PM
That occur on a Monday in 2015	=Mon 2015
From the 10th through the 16th of November 2015 and from 3:00 PM to less than 6:00 PM (if the date format is MM/DD/YYYY)	11/{10..16}/2015 {3..5} PM

## Finding empty or non-empty fields

To find fields that are	Type this in the field
Not empty (fields that have data)	*
Empty	=



## Finding duplicate values

You can find all records for which one or more fields contain duplicate values. For example, you might want to find all records that aren't unique, then examine them to decide which records to use or delete. To find all duplicate records, in Find mode, type ! in the field.

## Finding records that match multiple criteria

You can narrow or broaden your search by using more than one criterion.

### Logical AND search

To narrow your search, enter criteria in as many fields as needed to make your request specific, then click **Perform Find**.

### Constraining (narrowing) a found set

You can narrow find results incrementally, looking for more specific detail as you search your database.

For example, after searching for all of the employees who work in Sales, you can narrow the search to find all of the employees in Sales named Alvarez:

1. Perform a find to find all of the employees who work in Sales. FileMaker Pro displays the found set in Browse mode.
2. Click **Find** and type the criteria to narrow the search (type Alvarez in the **Last Name** field).
3. Choose **Requests** menu > **Constrain Found Set**.  
The found set now consists of employees in Sales named Alvarez.

### Logical OR search

To widen your search, enter criteria in the first request. Click **New Request**. Enter the second (set of) criteria. Continue adding requests for each (set of) criteria, then click **Perform Find**. You can navigate among multiple requests using [**Left Arrow/Right Arrow**]

### Examples:

- To include customers in New York and customers in Paris in the found set, type New York in the **City** field in the first request, then type Paris in the **City** field in the second request.
- To include companies with more than 100 employees and companies with more than \$100 million in assets, type >100 in **Number of Employees** in the first request, then type >100,000,000 in **Capitalization** in the second request.
- To include 6th grade students who are in Algebra and 7th grade students who are in Geometry, type 6 in **Level** and Algebra in **Course** in the first request, then type 7 in **Level** and Geometry in **Course** in the second request.

### Extending (broadening) a found set

You can broaden a found set to expand your search to include additional applicable records without starting over.

For example, after searching for customers in New York, you can broaden the search to also find customers in Hong Kong:

1. Perform a find to find customers in New York. FileMaker Pro displays the found set in Browse mode.
2. Click **Find** and type the criteria to broaden the search (type Hong Kong in the **City** field).
3. Choose **Extend Found Set**.  
The found set now consists of customers in New York and Hong Kong.

## Finding records except those matching criteria

You can exclude (omit) records while performing a find. In other words, you can find information in your database that “does not equal” your specified criteria. For example, you can find all invoices except those created in the past 30 days.

Finding records that don't match criteria

1. In Find mode, type criteria for the records to omit.
2. Click **Include/Omit**.
3. Click **Perform Find**.

Finding some records while omitting others

For example, to find vendors in the state of New York except those in New York City:

1. In Find mode, type the criteria for the records to find (type New York in the State field).
2. Click **Add a Find Request**.
3. Type criteria for the records to exclude (type New York in the City field).
4. Click **Include/Omit**.
5. Click **Perform Find**.

Keep these points in mind:

- You can have omit criteria in more than one request.
- FileMaker Pro works through the requests in the order you create them.

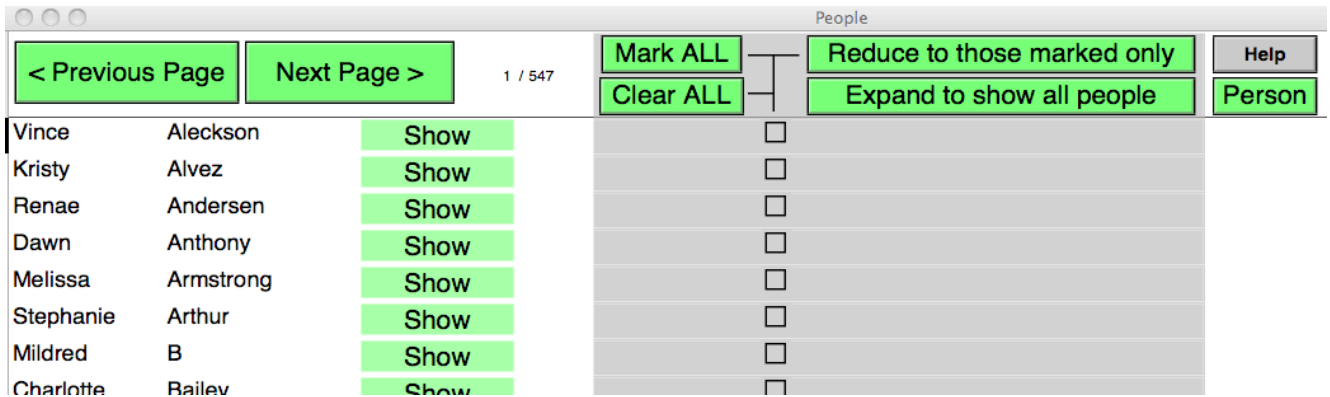
For example, in a Customers database with customers in the US and France:

- If the first request finds all customers in Paris and the second request omits all customers in the US, the found set contains all customers in Paris, France, but none in Paris, Texas, or anywhere else in the US.
- If the order of the requests is reversed (the first request omits all customers in the US and the second request finds all customers in Paris), the found set includes all customers in France, and in Paris, Texas, but no records for customers elsewhere in the US.

\*\*\* END OF TEXT AND TABLES EDITED FOR PARISH MANAGER FROM  
THE FILEMAKER PRO USER'S GUIDE – CHAPTER 2 \*\*\*

## 4.2 Using “GO TO”

When the “GO TO” button of the Person screen is clicked, PM displays a list of the people in the current “Found Set” (see 4.1 above). The user can jump immediately to view the details of a particular person, or modify the list of those people to remain in the found set.



The “Show” button beside a particular person will return the user to the Person screen showing the details of the selected person. This allows the user to jump between people without using the Find command.

The Check Boxes and the four associated buttons allow the user to modify the Found Set. For example, you may want to send an email to (almost) all men with an email address. You would use the Find button on the Person screen to find all men with an email address (see 4.1). Then click the “GO TO” button on the Person screen. The list will show the Found Set of all the men with an email address. Assuming that there are two men that you do not want to receive the email ...

Click “Mark ALL” – this will set the check box for everyone in the list

Then move through the list to find the two men, click on their check boxes to clear them

Then click on “Reduce to those marked only” - this will remove the two unchecked men from the list. (Note this does not delete anyone from the overall database).

Now, assuming you wish to also send the same email to your (female) Secretary ...

Click “Expand to show all people” – this will include all people in your database, with the men previously selected still showing their check boxes selected.

Move through the list to find your Secretary’s name. Click on her check box to set it

Then click on “Reduce to those marked only” – the list will now show the selected men and the Secretary

And then send the email to the Found Set ...

Click “Person” to return to the Person screen and then “Functions” etc to send the email to the Found Set.

## 5. PEOPLE FUNCTIONS

When the “People” button of the Main Menu is clicked, information about each individual is displayed, one person at a time on the “Person” screen.

### 5.1 Person

#### ADDRESS

The address fields here are the family address, which will be the same for all members of this household.

Prefix	Unit 25	(for example)
Number	21	
Street	Boston Road	
Suburb	Flinders	
State	NSW	
Postcode	2529	
Telephone	>> this is the family home telephone number	

#### AGE

The age of the person is calculated according to the current date and their date of birth. If the actual date of birth is unknown, the age known in a certain year can be entered to have an approximate age calculated. Ages can be printed in the published directory – if so only ages of those marked as children who are under a configurable years of age will be printed. The directory can be printed without any ages shown. (see 5.7.2.1)

## SURNAME

The surname shown at the top of this screen is by default the surname of the family. A person who has a surname different from the family surname can be included in this family. To achieve this, click on the surname on this screen and respond to the prompts. This “different surname” is used throughout PM and will show in printed lists such as the published directory, and will be used in find requests.

## CONTACTS

Each person can have an unlimited number of contacts (Phone, Mobile, Fax, Email or Other). To add a contact, click on “New Contact” button, then find the empty entry at the bottom of the list using the scroll bar on the right of the contacts list, then fill in the fields.



Type	select from the drop-down list (Phone, Email, Fax, Other)
Description	enter a short description (Home, Work, etc)
Detail	enter the actual phone number or email address, etc


There are two check boxes to set or clear


Primary	one of each type (Phone, Email, Fax, Other) can be set as primary - these are sorted to appear at the top of the list on this screen. The email set as Primary is used for emails sent out by PM. The phone set a Primary is used for SMS's sent out by PM.
Publish	check this if you wish this contact to appear in the published directory

The remove symbol  on each line will allow you to delete a contact for this person.


## SERVICES

Each person can be shown as attending multiple services. To add a service that this person attends, click the add symbol  and then select the desired service from the displayed drop-down menu and click . The list of services available on the drop-down menu is defined in Parish Setup (see 17.1). These selections affect the Print Service Roll and the Mark the Roll functions (see 5.7.1.1-2).



The remove symbol  on each line will allow you to delete a service for this person. Checking the “Inactive” box will temporarily remove a person from this service.

Clicking on the  of any particular service will display some summary information about that particular service, and the first 200 (alphabetically) people who attend this service.

## SEARCH CATEGORIES

The search categories for both the individual and family are completely configurable by the user. To add a category, click on the . This will bring up a dialog box into which you can enter the text of your new category. When you move to another person, the new category will be available for you to select. Please note: Question marks “?” in these categories will make searching fail.

Categories remain available while at least one person has that category checked. Once no one has a particular category checked, the category disappears.

To add a “Found Set” (see 4.1 above) of people to a category, use the  button. To remove a “Found Set” of people from a category, use the  button.

The screenshot shows a web-based form for a person's record. At the top, there are navigation buttons: Person, Family, Attendance, Follow Up, OTHER ..., Functions, and New. Below these are search and action buttons: FIND, SUBMIT, Help, Favourites, and Close. The main header displays the name 'Abbott' and a title 'Rev'. A 'PHOTO' box is on the left. The form fields include: Family Address (Fictitious Address), Age (64), Year at School, Male / Female (M), Head / Spouse / Adult / Child (H), School or Workplace (Hospital Chaplain, PM Developer), Birth Date (1/1/1956), and Family Phone (42nn nnnn). A 'GROUPS' section lists 'Evening', 'Prayer Book', 'Evelyn', 'Don (M)', and 'Men's Breakfast'. A 'STATUS' section includes 'Ministries' and 'Action' options. A 'PUBLISHING' section has a checkbox for 'Include this person Published Directory'. On the right, there are checkboxes for various ministries and a 'Parenting Course' checkbox. The date '23/01/11' is in the bottom right corner.

## TITLE

Each person can have a title (Mr, Mrs, ...). A drop down box will give the most common selections although any text may be entered into this field (Prof).

The gender of each person should be set to either M (Male) or F (Female).

Each person is required to have a designated rank or position in the family.

- H Head of House
- S Spouse
- A Adult
- C Child

This ranking is used for sorting of the families for printing or using the Sort button (See 5.8).

The gender and ranking are usually set when a new person record is created, although they can be altered at any time on this screen.

## PHOTO

To insert a photo of the person, simply drag and drop your photo into the photo area. (Some Browsers may require you to select Insert/Photo from the Browser menu)

Family photos can be included on a different screen (see 6).



*The Map function was removed in Version 18*



## STATUS

A record of the first contact with this person and their current status of attending are selected from drop-down menus.

Once a person has left the parish, their date of leaving can be noted. Clicking on “Left when?” will insert the current date in the field and allow you to edit it should this not be the appropriate date.



When a person leaves it is also important to ensure that they can no longer be automatically placed on a roster by the rostering function. To achieve this, click on the “Inhibit Rostering” radio button. To enable this person for rostering once “Inhibit Rostering” is set, navigate to the “Rosters” screen for this person and make changes there. (see 5.5.5)


To remove a person from PM, the User needs to be logged into the Supervisor account for the parish (see 20.1). When logged in as Supervisor, an additional check box will be seen in the bottom right of the screen. People records are not deleted from PM, but rather “hidden”. To hide a person, check the box “Hide this Person in the PM Archive”. The person is now only visible if logged in as Supervisor.


## PUBLISHING


Set this check box to include this person in the published directory. Individual members of families can be included or excluded.

## GROUPS

Each person can be shown as attending multiple groups. To add a group that this person attends, click the add symbol  and then select the desired group from the displayed drop-down menu and click . The list of groups available on the drop-down menu is defined in Parish Setup (see 17.1).

The remove symbol  on each line will allow you to delete a group for this person. Checking the “Inactive” box will temporarily remove a person from this group.

Clicking on the  of any particular group will display the summary information about that particular group plus a list of all the members of that group.

Clicking on the  button will display the ministries that this person undertakes (see 5.1.2).

### 5.1.1 *The Map function was removed in Version 18*


## 5.1.2 Ministries

Person Family Attendance Follow Up OTHER ... New Functions Sort

1 / 549

GO TO FIND SUBMIT Help Close

### Alan Abbott

 Fictitious Address  
21 Boston Drive  
Flinders NSW 2529  
Family Phone: 42nn nnnn

School/Work Hospital Chaplain, PM Developer

M Male Age 58  
Female

Phone Mobile 04nn nnn nnn  
Email Work aabbott@work.org.xau  
Other PM support@parish-software.net


#### MINISTRIES

Garden Maintenance  
 Sound Operator  
 Team Leader

#### Action Required

##### Children's Ministry Roles

Children's Ministry Role	Start Date	End Date
Kids' Club	1/07/2013	

The ministries are completely configurable by the user. To add a ministry, click the add symbol . This will bring up a dialog box into which you can enter the text of your new ministry.

Ministries remain available while at least one person has that ministry checked. Once no one has a particular ministry checked, the ministry disappears.

Children's Ministry Roles are shown on this screen as well as on the Safe Ministry and WWCC screen. The fill colour behind the text alerts the user should the person be disqualified for the position or needing an accreditation update shortly. See 5.7.4

## 5.2 Family

The family button shows the members of the family of the particular person. They are sorted with Head of Household, then Spouse, then Adults, then Children in descending age order. Only ages of children under the user configurable age (see 5.7) are shown on this screen if the publish children's age box is checked on the Functions screen (see 5.7).

Person Family Attendance Follow Up OTHER ... New Functions Sort


1 / 550 GO TO FIND SUBMIT Help Close

---

# Alan Abbott

Home Phone: 42nn nnnn

		Age
Alan	Abbott	
Kylie	Abbott	
Lachlan	Abbott	
Ben	Abbott	
Natalie	Abbott	14



## 5.3 Attendance

This screen is used in association with the Roll Marking and Follow Up functions (see 5.7.1). The elements of this screen are described below.

Person Family Attendance Follow Up OTHER ... Functions New

1 / 1

GO TO FIND SUBMIT Help

Favourites Close

**Alan Abbott** **THIS TERM**

WEEK ENDING SUNDAY ...

D	2	9	16	23	30	6	13	20	27	6	13	19	26	26	26	27	28	27	D
M	1	1	1	1	1	2	2	2	2	3	3	12	12	12	9	6	3	12	M
Y	11	11	11	11	11	11	11	11	11	11	11	10	10	10	10	10	10	09	Y

**CHURCH SERVICES**

	Inactive	13 week Average	Trend	*													Chart						
Evening	<input type="checkbox"/>	64%	0.15	0	1	1	0	1	1										47%	47%	47%	47%	47%
Prayer Book	<input type="checkbox"/>	58%	-0.04	1	0	0	1	0	1	1	1	1	0	1	1	0			70%	80%	65%	51%	50%

**STATISTICS**

**GROUPS**

	Inactive	13 week Average	Trend	*													Chart						
Evelyn	<input type="checkbox"/>	47%	-0.18				.67	1	1	0	0	1	0	0	0	1			67%	67%	67%	67%	67%
Don (M)	<input type="checkbox"/>	46%	-0.20	0	0	0	0	0	1	1	1	0	1	1	1	0			60%	70%	50%	80%	80%
Men's Breakfast	<input type="checkbox"/>	?	?																				

**ATTENDANCE ARCHIVE**

### THIS TERM

Attendance is recorded by PM on a rotating 13 week basis. This corresponds to a quarter of a year, or a school term plus associated holidays. The title lines of figures show the date of the Sunday (read vertically) for which the attendance is recorded.

The red asterisk indicates the last entry recorded by PM. When PM is requested to record the following week it will overwrite the next entry to the right (currently showing data from last term). Once the rightmost entry is recorded and the next week is to be recorded, PM will place this in the leftmost position, and overwrite the data there. The asterisk will be moved to the leftmost position. The following week PM will choose the next entry to the right. In this way the attendance of this person is recorded and available for the last 13 weeks.

The white bar with the 1's and 0's is the actual attendance. With a 1 indicating attendance and a 0 an absence. The field can be left blank for a "don't know". This might happen if the roll was not marked for that week. PM functions assist with the roll marking and recording (see 5.7.1)

The percentage figure to the left of the 13 weeks is the average attendance of this person over the last 13 weeks. Blank weeks are ignored in the calculation.

## ATTENDANCE ARCHIVE

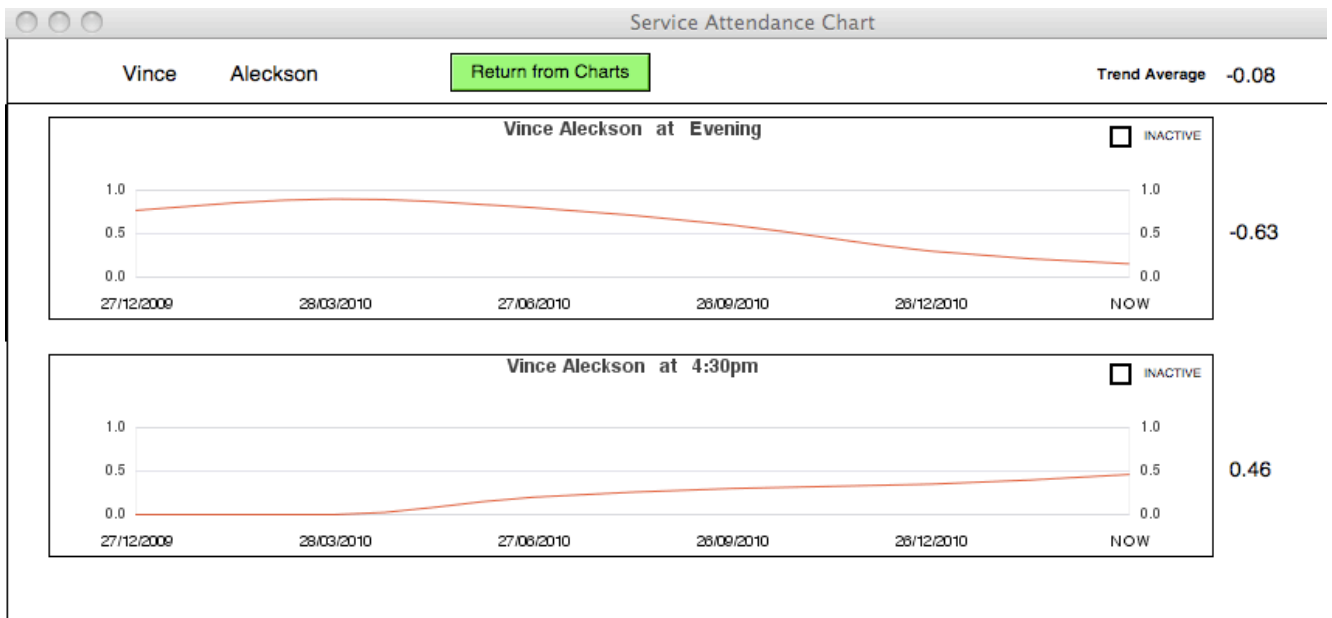
The attendance archive maintains a summary attendance for the previous five 13 week periods. The dates at which they were archived and the average attendance for the 13 weeks at that date are recorded, with any data previously in the fifth archive period being discarded.

## STATISTICS

The Trend figure is calculated by PM as an indicator of the trend in attendance of this person over time. A positive figure indicates that this person is recently attending more often than they have in the past. A negative figure indicates a decline in their attendance. This figure is calculated for each individual in the light of their previous attendance, with weight added to their recent attendance more than their older attendance rates.

The Trend figure is used by the Make Follow Up Suggestions function (see 5.7.1.4)

### 5.3.1 Charts



With the Browser interface, only one chart is shown at a time.

## 5.4 Follow Up

This screen is used to initiate and track pastoral follow up. On the left side there is maintained a one-line entry for the last three Follow Up requests. On the right there is the ability to record an unlimited number of pastoral notes to assist in coordinated care.

Person Family Attendance Follow Up OTHER ...New Functions Sort

1 / 1FIND SUBMIT HelpClose

### Alan Abbott

Fictitious Address

21 Boston Drive  
Flinders NSW 2529

Family Phone: 42nn nnnn

Why Follow Up

Pastoral Issue

Date Follow Up Requested 11/4/11

Follow Up Done 13/4/11 By by Harry

Notes

PASTORAL NOTESPrint New Note

Type	Date	Author	Action by	
Visit	13/04/11	Harry	Harry	-
Had coffee together, suggested we meet weekly for a while.				

### 5.4.1 Follow Up Request

Clicking on the "Follow Up Requested" button will cause the record of the last three follow up requests to be shuffled down, with the oldest being discarded. A new blank entry is created at the top of the list. Also the current date is inserted into the Follow Up Requested field.

While the Follow Up Done date in the new entry is blank, the follow up request is deemed to be active. It will therefore appear on the Follow Up Reports when they are viewed or printed (see 5.7.1.6-7)

The reason for follow up should also be filled in from the drop-down list. This reason will appear on the Follow Up Reports as well.

The Notes field is for longer term notes which may be helpful in the follow up of this person. Such as contact information of a relative in the case of a frail aged member.




## 5.4.2 Pastoral Notes

The display of Pastoral Notes is sorted so that the most recent note is at the top of the list. Pastoral notes have the following fields

Type	the types are determined by the user (i.e. Visit, Phone, Care Card, ...)
Date	the date of creation will be inserted and can be altered
Author	the name or initials of the author of this note
Action by	the name of the person expected to act on this note
Note Text	free form text note

To create a new note, click on the New Note button and then fill in the fields as required.

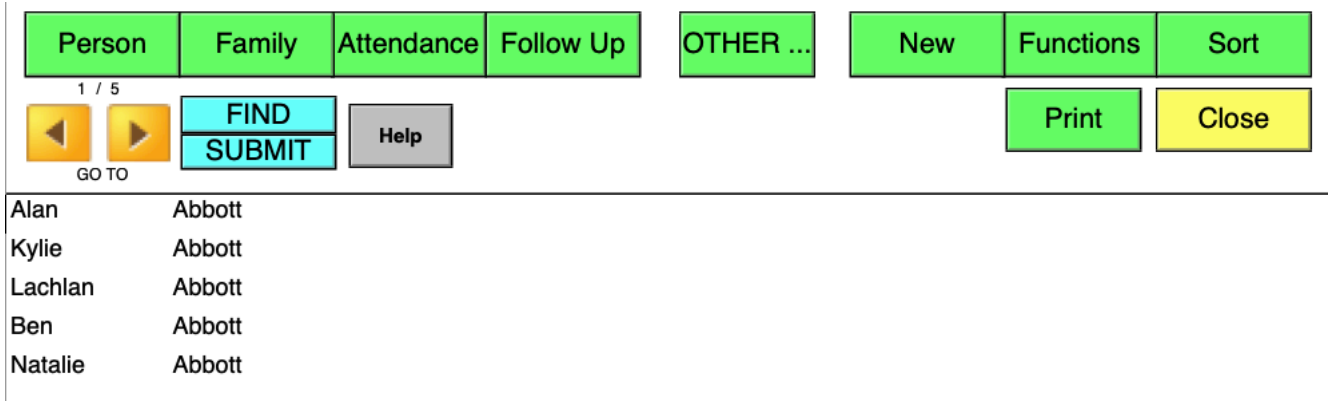
The backspace symbol  on each line will allow you to delete a pastoral note.

## 5.5 Other

The “Other” button displays a list of other screens available. Select the desired screen from the drop-down list and then click on “Go” which will appear just below the selected screen name.

Examples of the available screens are shown in the following sections.

### 5.5.1 Just Names



The screenshot shows a software interface with a top navigation bar containing buttons for "Person", "Family", "Attendance", "Follow Up", "OTHER ...", "New", "Functions", and "Sort". Below the navigation bar, there are several action buttons: "GO TO" (with left and right arrows), "FIND", "SUBMIT", "Help", "Print", and "Close". The "GO TO" button is currently selected, and the text "1 / 5" is displayed above it. Below the buttons, a list of names is displayed in two columns:

Alan	Abbott
Kylie	Abbott
Lachlan	Abbott
Ben	Abbott
Natalie	Abbott

## 5.5.2 Name, Address, Phone

The following is a sample of the screen once it is printed. The screen version has the fields more widely spread.

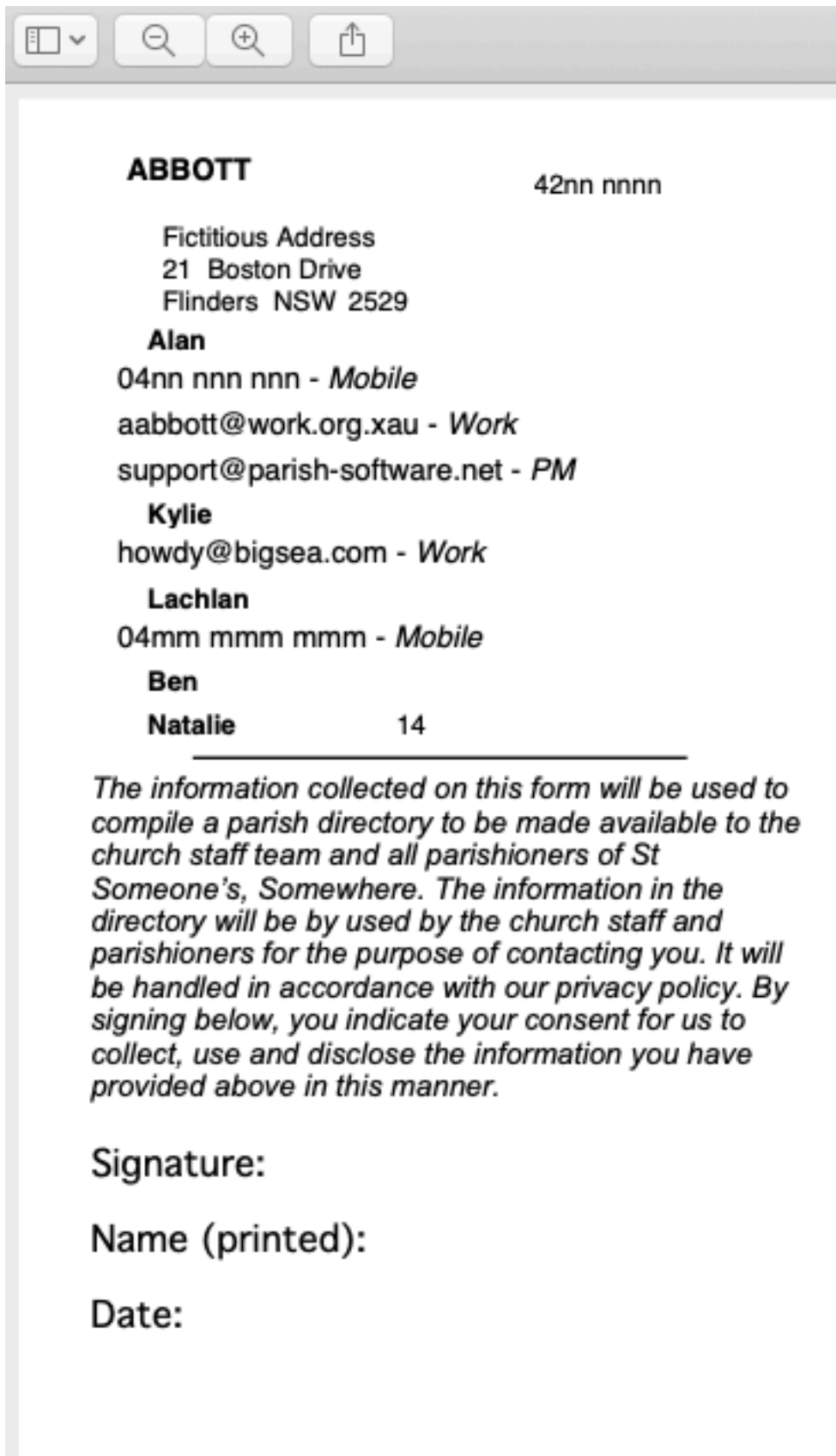
Rev	Alan Abbott	42nn nnnn	Fictitious Address 21 Boston Drive Flinders NSW 2529
	Ben Abbott	42nn nnnn	Fictitious Address 21 Boston Drive Flinders NSW 2529
	Kylie Abbott	42nn nnnn	Fictitious Address 21 Boston Drive Flinders NSW 2529
	Lachlan Abbott	42nn nnnn	Fictitious Address 21 Boston Drive Flinders NSW 2529
	Natalie Abbott	42nn nnnn	Fictitious Address 21 Boston Drive Flinders NSW 2529

### 5.5.3 Check Off List

Person	Family	Attendance	Follow Up	OTHER ...	New	Functions	Sort
1 / 11		FIND SUBMIT		Help	Print		Close
GO TO							
Alan	Abbott						
Ben	Abbott						
Kylie	Abbott						
Lachlan	Abbott						
Natalie	Abbott						
Vince	Aleckson						
Kristy	Alvez						
Renae	Andersen						
Dawn	Anthony						
Melissa	Armstrong						
Stephanie	Arthur						

## 5.5.4 Roll Authority

This selection will display the information that has been selected for publishing in the printed Directory. The format is dependent on the settings for Age, Photos and Size on the Functions screen (see 5.7). The following is a sample of the screen once it is sorted appropriately and printed. See section 5.7.2.1 to see a sample of the directory format with photos in two sizes.



The screenshot shows a web interface with a toolbar at the top containing icons for a list, search, zoom in, and share. Below the toolbar, the name **ABBOTT** is displayed in large bold letters, with the number **42nn nnnn** to its right. Underneath, a fictitious address is listed: **Fictitious Address**, **21 Boston Drive**, **Flinders NSW 2529**. Three individuals are listed: **Alan** with contact details **04nn nnn nnn - Mobile**, **aabbott@work.org.xau - Work**, and **support@parish-software.net - PM**; **Kylie** with **howdy@bigsea.com - Work**; and **Lachlan** with **04mm mmm mmm - Mobile**. **Ben** is listed without details, and **Natalie** is listed with the number **14**. A horizontal line follows the names. Below the line is a paragraph of text: *The information collected on this form will be used to compile a parish directory to be made available to the church staff team and all parishioners of St Someone's, Somewhere. The information in the directory will be by used by the church staff and parishioners for the purpose of contacting you. It will be handled in accordance with our privacy policy. By signing below, you indicate your consent for us to collect, use and disclose the information you have provided above in this manner.* At the bottom, there are three labels: **Signature:**, **Name (printed):**, and **Date:**.

## 5.5.5 Rosters

This screen is used to note for which rosters at which services and groups that this person is volunteering. It also notes known absences and any restrictions that need to be applied when rostering this person for these roles.

Before this screen can be used properly, the Services and Groups need to be defined by Parish Setup (see (17.1)).

The screenshot shows the Rosters screen for Vince Aleckson. At the top, there are navigation buttons: Person, Family, Attendance, Follow Up, OTHER..., Functions, and New. Below these are search and utility buttons: GO TO, FIND, SUBMIT, Help, and favourites. The main area displays a table of rosters with columns for Roster, Overall, Weeks Off, Partner, and Last Rostered. A table on the right shows Unavailable Dates. Red boxes highlight specific areas: 'RESTRICTIONS' points to the Overall column, 'EMAIL' points to the Last Rostered column, 'WHICH ROSTERS' points to the Roster column, and 'UNAVAILABLE' points to the Unavailable Dates table.

Roster	Overall	Weeks Off	Partner	Last Rostered
Prayer Book Holy Communion	H 1			30/06/2013
Prayer Book Sound System	2			21/07/2013
Evening Supper				21/07/2013
Evening Welcomer	1 3 4 5		Louisa Baker	9/06/2013

### WHICH ROSTERS

To note this person volunteering for a particular roster, click on an entry under “Roster” and select the appropriate Service & Roster combination

Add more rosters by filling in multiple lines.

### RESTRICTIONS

PM allows you to place restrictions on rostering this person on a per roster basis, and on an overall basis.

#### OVERALL RESTRICTIONS

In this field you note the weeks of the month (1, 2, 3, 4, 5) and the Holiday (H) or Non-holiday (N) seasons that this person is unavailable for any rosters.

Restrictions can be entered in any order but must have spaces between them. For example 1 3 H would indicate that this person is not available for rostering on any 1<sup>st</sup> or 3<sup>rd</sup> Sunday of the month and they are not available at all during Holidays.



## INDIVIDUAL ROSTER RESTRICTIONS

The same restriction codes can be entered on the corresponding lines of individual rosters. This allows a high degree of control over when this person may be rostered for a particular role. It would be possible for a person to volunteer for rosters on two different morning services and to indicate which weeks they are available for which service, say 1<sup>st</sup>, 3<sup>rd</sup>, and 5<sup>th</sup> Sundays at the first service and 2<sup>nd</sup> and 4<sup>th</sup> at the second.

Note that if no restrictions are noted, PM will assume that this person is available for each and every one of their nominated rosters every week. This is the default position and gives the rostering system the widest choice of people to roster.

## PARTNERING

Where two or more people are required for a particular roster, one person can be linked to another to force the two people to be rostered together. For instance there may be two people to be rostered as Welcomers and a husband and wife desire to be rostered together.

When you click in the “Partner for Rostering” field, PM then presents a list of known people with that are volunteering for this roster. Click on the person desired as the partner. Note: Both people should each should show the other as their partner. Click on NO PARTNER to blank out the partner name.

## CHECK BEFORE ROSTERING

This field can contain any text describing some special condition to be considered before rostering this person to any role. This allows the operator to make decisions during the rostering process that PM cannot take into account. i.e. “Does not drive at night outside daylight savings time”.

## UNAVAILABLE

Note the dates on which this person is unavailable for rostering for any reason. Up to twenty dates can be entered in any order. Once the date has past, its entry can be reused or deleted.

If a person is unavailable for an extended period, you could enter H N into their Overall Restrictions field to lock them out from any rostering – however you will need to clear this once they have returned and are available.

## EMAIL

Rosters can be delivered by email from PM (See 12.4). To validly receive rosters by email the person must have the “Rosters by Email” box checked and also have a Primary Email Contact defined in their contact list (See 5.1).

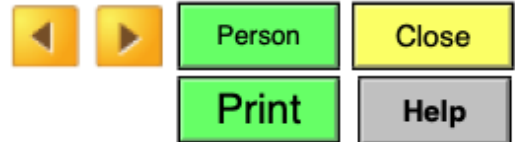
## 5.5.6 Name Tags

The text apart from the person's name is editable.

It is possible to place a graphic behind the text.  
(Click in the white space beside the name and use the FileMaker Pro "Insert Picture" menu item)

### Anyone and Everyone

**Vince Aleckson**



*is WELCOME!*

## 5.5.7 Care Network

PM summarises, for each person, the relationships that exist between them and others known to PM. Extended family and close friends can be noted, and relationships through “Care Giving” groups (as defined on the Service / Group Definitions screen, see 17.1) are shown.

The screenshot shows a software interface for managing people. At the top, there are navigation buttons: Person, Family, Attendance, Follow Up, OTHER ..., New, Functions, Sort. Below these are navigation arrows, FIND, SUBMIT, and Close buttons. The main content area is titled 'Louisa Baker' and is divided into several sections:

- Household Members:** A list containing 'Louisa Baker'.
- Services:** A list containing 'Evening'.
- Internal Relationships:** A list containing 'Kristy Alvez', 'Renae Andersen', 'Dawn Anthony', 'Melissa Armstrong', 'Charlotte Bailey', 'Louisa Baker', and 'Betty Bannister'.
- Other Relationships:** A list containing 'David Pellicci' with the relationship 'Father'. There is an 'Add a relationship' button.
- Groups:** A list containing 'Evelyn' and 'Joan'.

In the center, there is a question: 'Has Internal Relationships beyond Family?' with the answer 'Y'. A red box labeled 'CARE NETWORK' is overlaid on the Services and Groups sections. Another red box labeled 'RELATIONSHIPS' is overlaid on the Other Relationships section.

### RELATIONSHIPS

Extended family relationships and friendships can be made known to PM by clicking on the “Add a relationship” button. This function first requests the user to identify the related person and then to specify the relationship between the two. PM creates the reverse relationship at the same time – for example, David Pellicci is Louisa Baker’s father: David Pellicci will show that Louisa Baker is his daughter.

### CARE NETWORK

The care network seeks to identify internal relationships between this person and others; relationships which might be expected to result in pastoral care of one to the other. Common membership of a Bible Study group is assumed to provide this opportunity, whereas attendance at the same Church Service is not. Other groups can be identified as “Care Network Giving Groups” when defined (see 17.1). These groups appear under the heading Caregiving Groups of this screen.

The list of people on the right (Internal Relationships) is generated by PM. These people are in the same Bible Study or Caregiving Group as the person we are considering.

The indicator “Has Internal Relationships beyond Family” shows whether, or not, this person is isolated due to having no internal relationships apart from family.

## 5.5.8 Birthdays

On this screen the user can view the Birthdays of those known to PM (the Person's date of birth must be known to PM). The report shown below is produced from the "found set" of people and printed by clicking the Print button on the Birthdays screen.

### January

5-Jan Celie Hanson  
6-Jan David Hawke  
17-Jan Dianne Machala  
19-Jan Vanessa Haggart  
19-Jan Art Ivanov  
25-Jan Eric Johnson

### February

1-Feb Pat Kwong  
2-Feb David Farrugia  
5-Feb Val McKay  
7-Feb Ross Greenway  
10-Feb Ken Fraser  
15-Feb Ruth Gelding

22-Feb ...

### May

25-May Ben Hutchinson  
30-May Angela Lukins

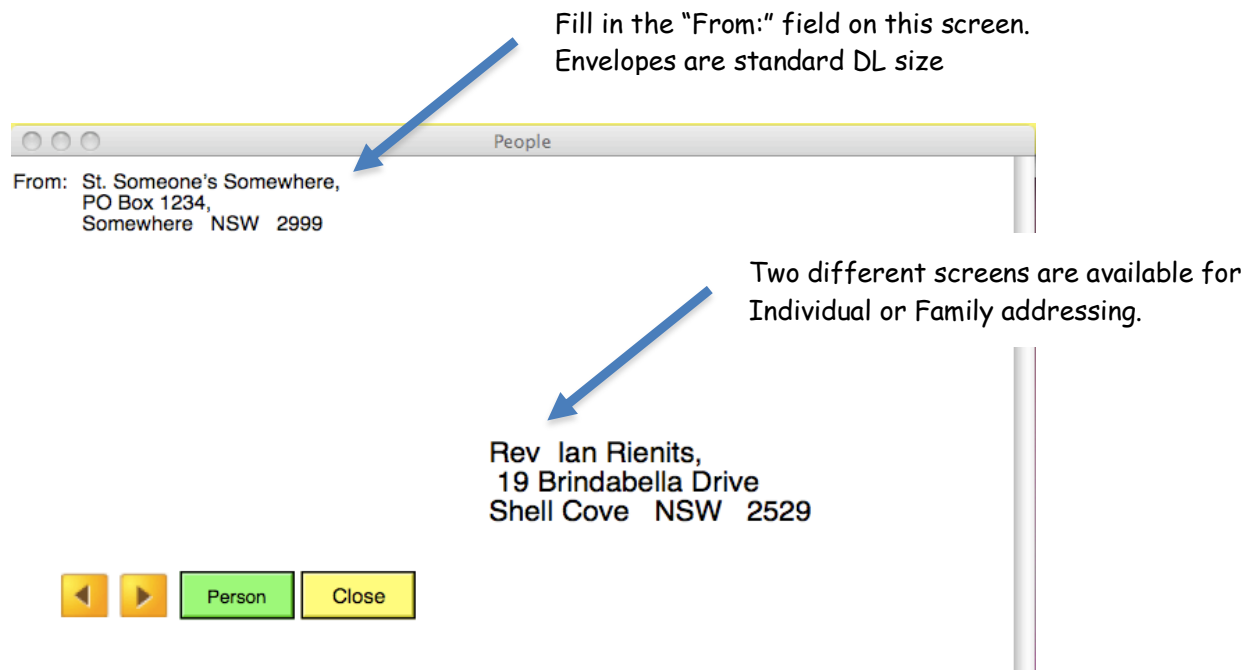
### June

17-Jun Matthew Haggart  
19-Jun Luke McPhail  
19-Jun Andrew Machala  
22-Jun Joan Janszen  
24-Jun Kelly Langridge  
28-Jun Sheila Jansen  
29-Jun Linda Hol

### July

1-Jul Lynnette Farrugia  
11-Jul Laz Gold

## 5.5.9 Envelopes



5.5.10 *This function was removed in Version 18*

## 5.6 New (Person)

A record for a new person is created by filling in the entries on this screen

- First Name    the new person's first name
- Surname      this should be the surname of the FAMILY of which this new person is a member (if their surname is different from the family surname you will change this later on the Person screen (see 5.1) )
- Gender        this should be set to either M (Male) or F (Female)
- Position      Each person is required to have a designated rank or position in the family.
- H      Head of House
  - S      Spouse
  - A      Adult
  - C      Child

Once these entries are made, click on the SUMIT button.

People

### NEW PERSON

Click on the known address of the new person, or on NEW Family

First Name:	FAMILY Surname:	Gender:	Position:
<input type="text" value="Henry"/>	<input type="text" value="Smith"/>	<input type="text" value="M"/> Male <input type="text" value=""/> Female	<input type="text" value="H"/> Head of House <input type="text" value=""/> Spouse <input type="text" value=""/> Adult <input type="text" value=""/> Child

Darren	1176 Barellan Avenue
John	111 Delmont Place
Stephen	1179 Wyndarra Way
Teresa	111 Coronet Place
Bonnie	38 Wyndarra Way
Amanda	

Once this data has been submitted, a list of families with that family surname is shown. If no list is shown then PM does not have any families with that surname. The list shows the first name of the Head of House of the family, a partial address and telephone number for each matched family.

If the family of the new person is shown in the list, click on that line.

Otherwise, click on the “NEW Family” button at the bottom of the screen.

This will create a new family if required and a new person record and then change the screen to the Person screen for you to enter more details about this new person. (See 5.1)

## 5.7 Functions (People)

The following sections describe the functions available via the “Functions” screen.

Person	Family	Attendance	Follow Up	OTHER ...	New	Functions	Sort
◀	▶	SUBMIT				Close	

---

<b>ATTENDANCE and FOLLOW UP</b> <span>Help</span>	<b>PUBLISHING</b> <span>Help</span>
<input type="button" value="Print Services Roll"/> <input type="button" value="Print Groups Roll"/>	<input type="button" value="Print Authorities"/> <input checked="" type="checkbox"/> Include Children's Ages under 21
<input type="button" value="Mark the Services Roll"/> <input type="button" value="Mark the Groups Roll"/>	<input type="checkbox"/> Include Family Photos <input type="checkbox"/> Large
<input type="button" value="Record the Attendance from the Marked Roll ..."/>	<input type="button" value="Print Directory"/> <input checked="" type="checkbox"/> Print ALL People, not just those selected
<input type="button" value="Make Follow Up Suggestions"/> <input type="button" value="Set Criteria ..."/>	<input type="button" value="Print Group Membership Summary"/>
<input type="button" value="Blank out this Week for All"/>	<input type="button" value="Email to selected people"/> 556
<input type="button" value="View Follow Up Report"/>	<input type="button" value="SMS to selected people"/> 556
<input type="button" value="Print Follow Up Report"/>	<input type="button" value="Print Grouped Distribution on Top of Sheets"/>

---

<b>ADMINISTRATION</b> <span>Help</span>	<b>SAFE MINISTRY and DOCUMENTATION</b> <span>Help</span>
<input type="button" value="Quarterly Update of Attendance Archives"/>	<input type="button" value="Safe Ministry and WWCC Records"/>
<input type="button" value="Set Initials to Names"/>	<input type="button" value="Print Safe Ministry &amp; WWCC Report"/>
<input type="button" value="Export People Data ..."/>	<input type="button" value="Dates of completion and expiration of Forms"/>
556	



### 5.7.1 Attendance and Follow Up

PM can record the attendance of individuals on a weekly basis. To do this, the individuals must have one or more Services or Groups marked on their Person screen (5.1). Using these functions, the user can

- print out a Services or Groups Roll which can then be physically marked
- mark the roll electronically onto PM
- store this marked roll in the appropriate place for the date of attendance

From the attendance records, PM can be requested to make suggestions for following up people whose attendance is declining. (See 5.3)

#### 5.7.1.1 Print Services Roll / Print Groups Roll

The following is are samples of the printouts produced. The individuals are sorted alphabetically within their Services or Groups. (See 5.1 SERVICES and GROUPS)

##### Church Service

9:30AM

Neville		<input type="checkbox"/>	Irene	Hitchcock	<input type="checkbox"/>	Andrea	Shaw-	<input type="checkbox"/>
Coral	Bartle	<input type="checkbox"/>	Joan	Janszen	<input type="checkbox"/>	Dorothy	Shaw-	<input type="checkbox"/>
Barbara	Baxter	<input type="checkbox"/>	Rex	Johnson	<input type="checkbox"/>	Charlie	Smithers	<input type="checkbox"/>
Peter	Bell	<input type="checkbox"/>	Scott	Jones	<input type="checkbox"/>	Elsie	Smithers	<input type="checkbox"/>
Robin	Chapman	<input type="checkbox"/>	Pat	Kwong	<input type="checkbox"/>	Kathleen	Streeter	<input type="checkbox"/>
Jim	Cheetham	<input type="checkbox"/>	Jim	Lacey	<input type="checkbox"/>	Tudno	Tomlinson	<input type="checkbox"/>
Sid	Cunynghame	<input type="checkbox"/>	Majorie	Lake	<input type="checkbox"/>	Jim	Tory	<input type="checkbox"/>
Dianne	Daly	<input type="checkbox"/>	Robyn	Leon	<input type="checkbox"/>	Ian	Towers	<input type="checkbox"/>
Brendon	Eames	<input type="checkbox"/>	Dora	McPhail	<input type="checkbox"/>	Allan	Webb	<input type="checkbox"/>
Kathy	Eames	<input type="checkbox"/>	Kath	McPhail	<input type="checkbox"/>	Audrey	Webb	<input type="checkbox"/>
Renae	Eames	<input type="checkbox"/>	Noreen	Oliver	<input type="checkbox"/>	Anne	Wellard	<input type="checkbox"/>
Peter	Edler	<input type="checkbox"/>	Kim	Park	<input type="checkbox"/>	Esmā	Weston	<input type="checkbox"/>
Wendy	Fahey	<input type="checkbox"/>	Ruth	Pearce	<input type="checkbox"/>	Stephen	Wheeler	<input type="checkbox"/>
Helen	Farmer	<input type="checkbox"/>	Bruce	Romanovski	<input type="checkbox"/>	Arthur	Williamson	<input type="checkbox"/>

##### Bible Study

EVELYN

Kristy	Alvez	<input type="checkbox"/>
Dawn	Anthony	<input type="checkbox"/>
Charlotte	Bailey	<input type="checkbox"/>
Louisa	Baker	<input type="checkbox"/>

##### Bible Study

JOAN

Renae	Andersen	<input type="checkbox"/>
Melissa	Armstrong	<input type="checkbox"/>
Louisa	Baker	<input type="checkbox"/>
Betty	Bannister	<input type="checkbox"/>

### 5.7.1.2 Mark the Roll (Services or Groups)

To mark the roll for a Church Service, click the “Mark the Services Roll” button then select (and submit) the Service Name from the drop down menu.

The list in the four columns of the screen shows all those who are selected as attending the service specified.

To mark the roll, the user enters a 1 or a 0 into the field alongside the name. The field may be left blank indicating a “don’t know”. Move down the list easily using the Return key. Move to the next column with the Tab key.

Please note: Once this has been done, the data entered has not yet been recorded under the appropriate date in PM. This is done by the next step, “Record the Attendance from the Marked Roll ...” (5.7.1.3).

The user can mark the roll for another service by clicking the “Mark Roll for a different Service” button and specifying a Service Name.

Once completed entering the marked roll(s), click on the “Return to People Functions” button.

To mark the roll for a Group, click the “Mark the Groups Roll” button then select (and submit) the group from the drop down menu.

Mark the roll with 1’s and 0’s as noted for the Services Roll.

#### Evening

Sunday

Alan Abbott	1
Vince Aleckson	1
Kristy Alvez	0
Charlotte Bailey	1
Louisa Baker	1
Jim Barrett	0
Leesa Bartle	0
Lyndall Batson	1
Bob Benn	1
Robyn Bennett	
Trevor Blissett-Walker	
Greg Boardman	

Janet Goldie	
Kaitlyn Goode	
John Hagenaar	
Matthew Haggart	
Brian Hall	
Celie Hanson	
Ben Harper	
Daniel Harvey	
April Haug	
David Hawke	
Faye Heaney	
Linda Hol	

Melanie McPhail	
Tim McPhail	
Diana Meyer	
Karoleena Mitchell	
Ainsley Monkman	
Stuart Morris	
Charles Moulds	
Frank Muir	
Lorraine Mullaney	
Elwyn Newman	
Elise Nicholls	
Jean-anne O'Connor	

Mark Roll for a different Service

Return to People Functions

#### Evelyn

Kristy Alvez	1
Dawn Anthony	1
Charlotte Bailey	1
Louisa Baker	0
Evelyn Harrison	1

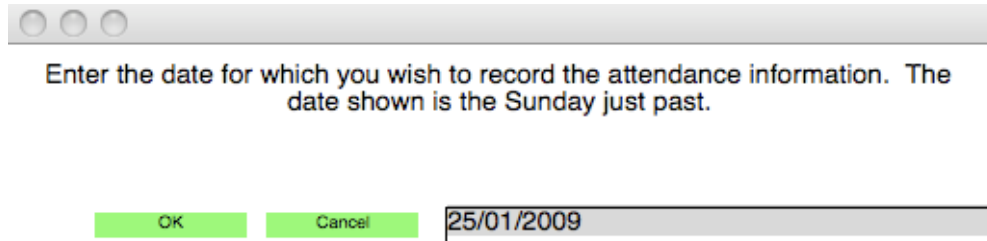
Mark Roll for a different Group

Return to People Functions

### 5.7.1.3 Record the Attendance

PM records the weekly attendance under the date of the Sunday of that week. This should only be done once all the roll information for that week has been entered for the Services and Groups (see 5.7.1.2). When you select this function, PM will prompt for the date of the Sunday to use for this data. It will show the just past Sunday as the default. Once the date is correct, click OK.

PM will transfer the Marked Rolls (5.7.1.2) to the appropriate date record for each Person, Service and Group.



#### 5.7.1.4 Make Follow Up Suggestions

Once the Roll has been marked and recorded (5.7.1.2-3), the user may request PM to make suggestions as to which people might require following up. These suggestions are made on the basis of the calculated trend of attendance (see 5.3) and the trigger criteria that have been set by the user. (See 5.7.1.4.1)

Note: The request for follow up suggestions should be made after the roll has been marked and recorded and before the “Blank Out This Week For All” function is used. (See 5.7.1.5)

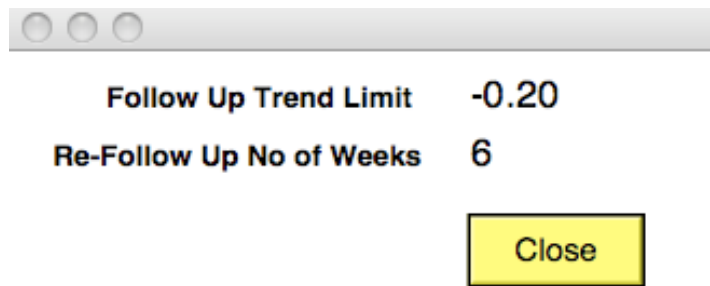
Clicking on a green entry in the Trend column will display the attendance Charts for this person. Clicking on a green entry in the Follow Up Request column will change the screen to the Follow Up screen (5.4) to allow you to initiate follow up for this person. (Clicking on CLOSE on the Follow Up screen will return you to this Suggestions screen.)

Name	SERVICE	Trend	Follow Up Last	Follow Up Request
Holm Swan	10:00am	-1.0		
Sarah Talbot	4:30pm	-1.0		
Helen Towers	Evening	-1.0		
Rachel Turnbull	Evening	-1.0		
Esmat Weston	9:30am	-1.0		
Colin Williams	Evening	-1.0		
Michelle Workman	10:00am	-1.0		
Stephen Wheeler	9:30am	-1.0	2/09/10	2/09/10
Stephen Wheeler	Thursday	-1.0	2/09/10	2/09/10
Stephen Wheeler	Evening	-0.4	2/09/10	2/09/10
Alec Cass	Prayer Book	-0.3		
Margaret Cunynghame	Prayer Book	-0.3		
Eric Johnson	10:00am	-0.3		
Luke McPhail	10:00am	-0.3		
Ninnette Rouse	Evening	-0.3		
Nathan Horrell	Evening	-0.3		
Norma Laughton	Prayer Book	-0.3		
Hazel Roser	Thursday	-0.3		
Ben Weston	Evening	-0.3		
Leigh-anne Weston	Evening	-0.3		
Nathan Paull	Evening	-0.2		
Leigh-anne Weston	10:00am	-0.2		

Name	GROUP	Trend	Follow Up Last	Follow Up Request
Betty Bannister	Joan	-1.0		

#### 5.7.1.4.1 Set Criteria

PM makes the suggestions for follow up based on the criteria that the user has set.



The Trend Limit is a threshold below which a person might be suggested for follow up. This trend is a calculated indicator of the attendance trend of the particular person. The user will need to tune this value to their needs.

The Re-Follow Up number of Weeks restricts PM to suggesting an individual no more often than the number of weeks specified.

#### 5.7.1.5 Blank Out This Week

This function removes all the 1's and 0's from the marked roll to present a clean roll for the coming week. It does not affect the data that has been recorded to the appropriate date in PM.

#### 5.7.1.6 View Follow Up Report

A screen view of outstanding follow up requests is generated with this function.

As at: 19/06/2011				<u>Request</u>	<u>Why</u>
Vince	Aleckson	Billabong Close	Mulgoa	26/5	
Nathan	Paull	Gilba Road		19/6	Illness - at home
Leigh-anne	Weston	Darly Ave		19/6	Pastoral Issue
Margaret	Cunyngame	Figtree Drive	Some Town	19/6	Absentee

#### 5.7.1.7 Print Follow Up Report

A printout of outstanding follow up requests is generated with this function.

As at: 19/06/2011				<u>Request</u>	<u>Why</u>
Vince	Aleckson	722 Billabong Close	Mulgoa	26/5	
Nathan	Paull	2617 Gilba Road		19/6	Illness - at home
Leigh-anne	Weston	1250 Darly Ave		19/6	Pastoral Issue
Margaret	Cunyngame	1285 Figtree Drive	Some Town	19/6	Absentee

## 5.7.2 Publishing

The Print Directory, Email to selected people, SMS to selected people, Print Grouped Distribution and Print Group Membership Summary functions are described below. The Print Authorities function produces the same printout as has been described in 5.5.4.

### 5.7.2.1 Print Directory

PM can produce a directory of names, addresses, contacts and family members for distribution to your members. Using the check boxes, the directory can optionally have family photos included in one of two sizes, the ages (configurable) of children shown, and can be a complete directory of all people known to PM or just those indicated for the Published Directory (see 5.1). Each type of directory is printed on A4 Landscape paper and is designed to be photocopied back-to-back and then folded into an A5 booklet.

Individuals can have selected contact information shown or withheld from the directory (see 5.1).

Sample entries of the directory with and without photos follow.

**ABBOTT** 42nn nnnn



Fictitious Address  
21 Boston Drive  
Flinders NSW 2529

**Alan**

04nn nnn nnn - *Mobile*

aabbott@work.org.xau - *Work*

support@parish-software.net - *PM*

**Kylie**

howdy@bigsea.com - *Work*

**Lachlan**

04mm mmm mmm - *Mobile*

**Ben**

14 **Natalie**

*The information collected on this form will be used to compile a parish directory to be made available to the church staff team and all parishioners of St Someone's, Somewhere. The information in the directory will be by used by the church staff and parishioners for the purpose of contacting you. It will be handled in accordance with our privacy policy. By signing below, you indicate your consent for us to collect, use and disclose the information you have provided above in this manner.*

Signature:

Name (printed):

Date:

**ABBOTT** 42nn nnnn

Fictitious Address  
21 Boston Drive  
Flinders NSW 2529

**Alan**

04nn nnn nnn - *Mobile*

aabbott@work.org.xau - *Work*

support@parish-software.net - *PM*

**Kylie**

howdy@bigsea.com - *Work*

**Lachlan**

04mm mmm mmm - *Mobile*

**Ben**

**Natalie** 14

*The information collected on this form will be used to compile a parish directory to be made available to the church staff team and all parishioners of St Someone's, Somewhere. The information in the directory will be by used by the church staff and parishioners for the purpose of contacting you. It will be handled in accordance with our privacy policy. By signing below, you indicate your consent for us to collect, use and disclose the information you have provided above in this manner.*

Signature:

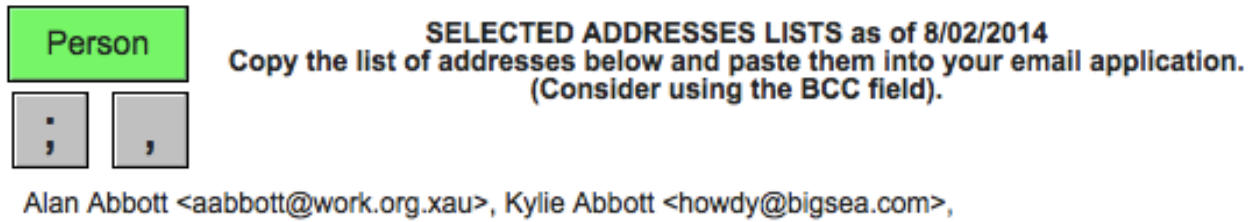
Name (printed):

Date:

### 5.7.2.2 Email to selected people

Once a group of people known to PM has been found and it is desired to send an email to each person in the group, the user can select this function.

PM compiles a list of the email addresses of each person separated by “,”. This list is presented to the user on the following screen:



The user then selects the text of the address list and does a copy and paste from PM into their local mail application (ie Mail or Outlook). Depending on the mail application, the “,” separators may need to be replaced with “;”. To do this, click on the “;” button before copy and pasting.

### 5.7.2.2 Print Grouped Distribution on Top of Sheets

Once a group of people known to PM has been found and it is desired to distribute copies of printed material to them, this function will group households together and print each of the selected people at the top edge of an A4 sheet, one per household.

See also 12.4 for automated distribution via email and print of Rosters produced by PM.



### 5.7.2.3 Print Group Membership Summary

This prints all the defined groups showing their Meeting and Leader's details and the names of the members of each group. The Meeting and Leader's details are defined with the Parish Setup function (see 17.1).

Shown here is a sample of the summary printed.

---

Bible Study	EVELYN
<b>Leader:</b>	
<b>Evelyn Harrison</b>	Kristy Alvez Dawn Anthony Charlotte Bailey Louisa Baker Evelyn Harrison
	
<b>9191 nnnn</b>	



#### 5.7.2.4 SMS to selected people

Once correct configuration information is entered, this function can be used by users logged in either via FileMaker Pro or a Web Browser.

Setup for SMS sending: This function requires an account with SMSGlobal (<http://www.msglobal.com>) and costs of sending SMS's need to be prepaid by the Parish. Entering the SMSGlobal account information into PM is done on the Parish Set Up screen (see 17) by the Supervisor User.

Setup for Email sending with this function: As this function may not use the local computer's mail application, the information found at the bottom of the screen is required to be entered in order to send emails. Each user can have a different set of four items.

Once a group of people known to PM has been found and it is desired to send a message to each person in the group, the user can select this function. Data is filled on the following screen.

The screenshot shows a web browser window titled "People" with a sub-header "Sending SMS's and Emails with no attachments". A green "Person" button is visible in the top left. The main form contains the following elements:

- Delivery Method:** "First attempt to deliver the message should be by" with radio buttons for "SMS" and "Email" (selected). A cyan "SUBMIT" button is to the right.
- Message From:** A text field containing "DemoPM".
- Message Subject:** A text field containing "Men's Breakfast coming".
- Salutation:** A text field containing "Dear Friends" and a dropdown menu with options "Dear / Hi / Good Morning / Hey".
- Include First Name:** A checkbox (unchecked) with the text "Include First Name (This will generate multiple messages) (Dear John)".
- Message Text:** A large text area with the content "Our next Men's Breakfast will be on this Saturday at 8:00am (\$5)". A red note above the text says "Total SMS max 160 chars".
- Signoff:** A text field containing "Regards, Ian". A cyan "SUBMIT" button and a green "SEND" button are to the right.
- Selected People:** The text "51 People selected" is displayed in the bottom right corner of the main form area.

Below the main form is a section titled "Email Setup for Demo" with the following fields:

- Sender(i.e. John Smith): "Ian Rienits"
- Email Reply Address: "mensbreaky@stsomeones.org.au"
- Email SMTP Outgoing Server: "mail.bigpond.com"
- Email Sending Address: "support@parish-software.net"

Select SMS or Email as the first method of sending.

Fill in the "SMS From" field - if this is a mobile phone number, the receivers can reply to this number. However you can set it to a descriptive word (ie Church).

Fill in the Subject, Salutation, Message Text, and Signoff. If you select "Include First Name", multiple SMS's, Emails and Memos will be generated. NOTE: Large groups of messages can be quite tedious to send if you select "Include First Name".

Once data is entered, click on SEND. When the function is completed, click on PERSON.

### **When you are logged in via FileMaker Pro.**

If you select SMS, PM will look at your "found set" and send an SMS to each person that has a "Primary Phone" contact entry that begins with 04. You will then be given the option to send an email copy of the message to the remainder. Should any of the remainder not have a "Primary Email" contact entry, you will be given the option to print out a Memo format of the message for these people.

If you select Email, the process begins with email and no SMS's are attempted.

Once completed, a summary of who was sent the message by what method is available for printing.

### **When you are logged in from a web browser.**

If you select SMS, PM will look at your "found set" and send an SMS to each person that has a "Primary Phone" contact entry that begins with 04. Any of the remainder who have a "Primary Email" contact entry will be sent an email copy of the message. No Memo format of the message is printed for any further remaining people. There is no option to just send SMS's and no emails to the remainder.

If you select Email, the process begins with email and no SMS's are attempted.

Once completed, a summary of who was sent the message by what method is sent by email to your designated printout email address.

### 5.7.3 Administration

#### 5.7.3.1 Quarterly Attendance Archive

The attendance records for PM are kept and archived on a quarterly basis. At the end of each quarter, the user should ensure that the previous 13 week summary is archived using this command.

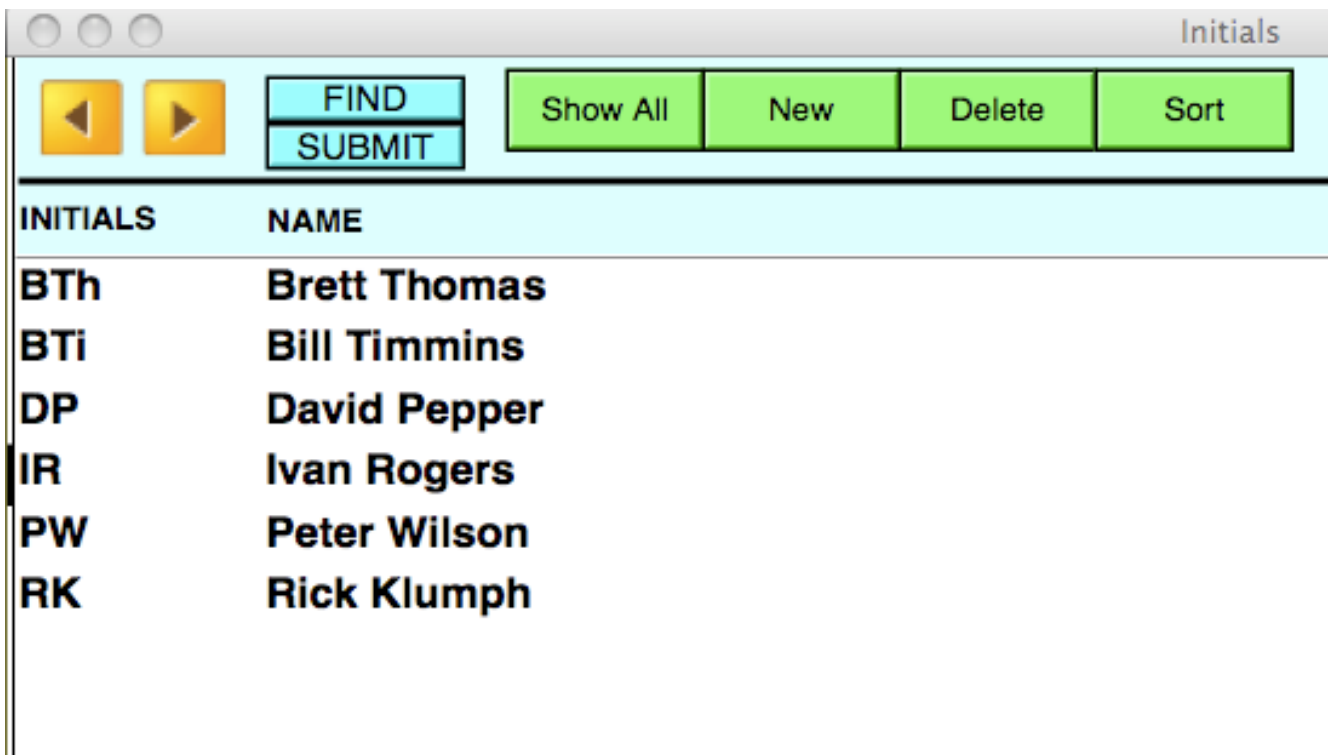
Note: When using the “Record the Attendance” function (5.7.1.3), if PM is requested to fill in the last entry of a quarter, PM will prompt the user to allow the Quarterly Attendance Archive to run automatically at that time. Normally it would be appropriate to let the function run at that time. However it is available here for manual initiation.

#### 5.7.3.2 Section removed version 12.0.1

#### 5.7.3.3 Section removed version 11.0.1

#### 5.7.3.4 Set Initials to Names

A list of initials to names is maintained to assist in entering Preachers, Leaders, Celebrants, etc. when setting up individual Service records (see 10.2). The list is set up with this screen. These initials are required if the automated rostering is to check for roster incompatibilities with the Leader, Preacher, or Celebrant (see 17.1).



The screenshot shows a window titled "Initials" with a toolbar containing navigation arrows, "FIND" and "SUBMIT" buttons, and "Show All", "New", "Delete", and "Sort" buttons. Below the toolbar is a table with two columns: "INITIALS" and "NAME".

INITIALS	NAME
<b>BTh</b>	<b>Brett Thomas</b>
<b>BTi</b>	<b>Bill Timmins</b>
<b>DP</b>	<b>David Pepper</b>
<b>IR</b>	<b>Ivan Rogers</b>
<b>PW</b>	<b>Peter Wilson</b>
<b>RK</b>	<b>Rick Klumph</b>

5.7.3.5 *This function was removed in Version 18*

5.7.3.6 *This function was removed in Version 18*

### 5.7.3.7 *Export People Data*

In order to prepare lists from the PM database for the user to merge into correspondence or to format in ways different from the standard PM formats, this function will export to a file some basic information about the people in the current “found set”.

The number below the “Export People Data ...” button is the number of people in the current “found set”.

The exported data is held on the user’s local computer and not on the Parish Manager Server and is no longer password protected. Administrators should ensure this data is secure and included in their local backup procedure.

This file can be of a number of formats.

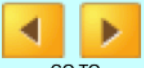

Use the “Merge” format to obtain a file suitable for doing a Mail Merge in Microsoft Word.

Use the “Comma Separated Values” format to enable applications such as EXCEL to easily read the file.

When this function is used from a Web Browser, the file with the exported data is downloaded to the standard Download folder of the relevant browser being used.

## 5.7.4 Safe Ministry and Documentation

### 5.7.4.1 Dates of completion and expiration of Forms

Person	Family	Attendance	Follow Up	OTHER ...	New	Functions	Sort	
1 / 550								
		<input type="button" value="FIND"/>				<input type="button" value="SUBMIT"/>		<input type="button" value="Close"/>
GO TO								
<h1>Alan Abbott</h1>								
		<b>Fictitious Address</b> 21 Boston Drive Flinders NSW 2529 Family Phone: 42nn nnnn			Age <b>64</b>			
School/ Work		Hospital Chaplain, PM Developer						
				<b>Dated</b>		<b>Expiry</b>		
First Aid				12/3/18		12/3/21		
Mental Health First Aid				6/7/13		6/7/18		
Scripture Teacher Basic Training				7/8/95				
						Anglicare		
						Anglicare		
						Youthworks Nowra		

5.7.4.2 This Report was removed in Version 13

5.7.4.3 This function was removed in Version 13

#### 5.7.4.4 Safe Ministry and WWCC Records

This function is only available to authorised users. See 17.3.1.2

On this screen relevant records for each individual involved in Children's Ministry is recorded and checked for compliance. (Compliance is based on advice from Sydney Anglican Diocesan Professional Standards Unit, late 2013)

A fully compliant person would be shown like this:

The screenshot displays a user interface for managing ministry records. At the top, there are navigation buttons (Person, left arrow, right arrow, FIND, SUBMIT) and a page indicator (4 of 549). The main content is divided into several sections:

- Person Details:** Name: Lachlan Abbott; Address: 21 Boston Drive, Flinders NSW 2529; Date of Birth: 1/01/90.
- Active in Children's Ministry Summary:**
  - Person Details: Complete
  - Safe Ministry Training: Up to Date
  - Safe Ministry Policy Checks: Clearance
  - Working With Children Check: Up to Date
- Children's Ministry Roles:** A table with columns for Role, Ex, Start Date, and End Date. One entry is 'Kids' Club' with 'Ex' checked and 'Start Date' 23/09/2013.
- Safe Ministry Training:** Expires 24/09/2016. Includes fields for Full Name, Place of Birth, Location, Trainer, and Date Completed (10/10/2010). A 'Part A & B Refresher/s' section is also present.
- Safe Ministry Policy Checks:** Date Reference Check / Screening Completed: 1/05/2010. Includes a 'Police Check' section with radio buttons for 'Required' and 'Not Required' (selected). Policy Checks Outcome: Clearance (selected).
- Working With Children Check:** Expires 14/09/2015. Includes a table for Test Date, Result, and Expires. One entry shows '6/08/2012', 'Verified', and '14/09/2015'. Reference Number: 565625.

Areas that do not meet requirements will be highlighted in red. Areas that require action to update a qualification within the next preset months will be highlighted in orange. The status lines in the top right-hand corner summarise where action is required.

A partially compliant person might be shown like this:

The screenshot displays a user interface for managing ministry records, similar to the previous one but with several red highlights indicating non-compliance:

- Person Details:** Name: Kylie Abbott; Address: 21 Boston Drive, Flinders NSW 2529; Date of Birth: 10/08/58.
- Must be removed from Children's Ministry Summary:**
  - Person Details: Complete
  - Safe Ministry Training: Up to Date
  - Safe Ministry Policy Checks: Clearance
  - Working With Children Check: Expired
- Children's Ministry Roles:** The entire section is highlighted in red. The table shows 'Kids' Club' with 'Ex' checked and 'Start Date' 23/09/2013.
- Safe Ministry Training:** Expires 5/06/2015. Includes fields for Full Name, Place of Birth, Location, Trainer, and Date Completed (5/06/2012).
- Safe Ministry Policy Checks:** Date Reference Check / Screening Completed: 1/08/2012. Includes a 'Police Check' section with radio buttons for 'Required' and 'Not Required' (selected).
- Working With Children Check:** Expires 5/10/2013. Includes a table for Test Date, Result, and Expires. One entry shows '5/09/2009', 'Verified', and '5/10/2013'. Reference Number: 444892.

An automatic exemption from WWCC is noted if the person is under 18 years of age.

A WWCC exemption can be noted for a Children's Ministry in which the person is a parent of a child who attends. This is signified by the Ex checkbox on the Children's Ministry line.

Both these exemptions cause a note to be made in the WWCC section.

#### 5.7.4.5 *Safe Ministry and WWCC Report*

This function is only available to authorised users. See 17.3.1.2

This report can be generated automatically by PM each week and emailed to a specified address. This is part of Parish Setup (Section 17)

### St Someone's, Somewhere

#### SAFE MINISTRY and WWCC STATUS

Date Printed: 8/02/14

---

#### Must be removed from Children's Ministry

	Safe Ministry Training Expiry	WWCC Expiry
Alan Abbott	14/09/2015	
Kylie Abbott	5/06/2015	5/10/2013

### St Someone's, Somewhere

#### SAFE MINISTRY and WWCC STATUS

Date Printed: 8/02/14

---

#### Renew This Year to continue in Children's Ministry

	Safe Ministry Training Expiry	WWCC Expiry
Vince Aleckson	4/06/2014	15/07/2016

### St Someone's, Somewhere

#### SAFE MINISTRY and WWCC STATUS

Date Printed: 8/02/14

---

#### Active in Children's Ministry

	Safe Ministry Training Expiry	WWCC Expiry
Ben Abbott	18/09/2016	
Lachlan Abbott	24/09/2016	14/09/2015

## 5.8 Sort

This button will cause a list of people to be sorted into their families, and then by their position (Rank) in the family and their age.

## 6 FAMILIES

The Families screen shows a summary of the family information.

To insert a photo of the family, simply drag and drop your photo into the photo area. (Some Browsers may require you to select Insert/Photo from the Browser menu)

Photos of individual people can be included on the Person screen (see 5.1). The family photo can be included in the printed directory (see 5.7.2.1).

A postal address can be entered on this screen for the family. It will appear on the printed directory (see 5.7.2.1).

The panels at the bottom of the screen show the situations for which this family is known by PM. The individual members of the family are shown, the dates of any Weddings of family members, the name of any persons from this family who have a PM Baptism record, and the name of the Deceased for whom a family member was the Funeral Contact person. Clicking on any of these entries will bring up another screen with further details.

Surname **Abbott**  
 Title  
 Prefix **Fictitious Address**  
 Number **21**  
 Street **Boston Drive**  
 Suburb **Flinders**  
 State **NSW**  
 Postcode **2529**  
 Telephone **42nn nnnn**



Notes

Postal Address

People		Wedding as Bride	Baptisms
Alan	Abbott		
Kylie	Abbott		
Lachlan	Abbott		
		Wedding as Groom	Funerals
Ben	Abbott		
Natalie	Abbott		



## 7 BAPTISMS

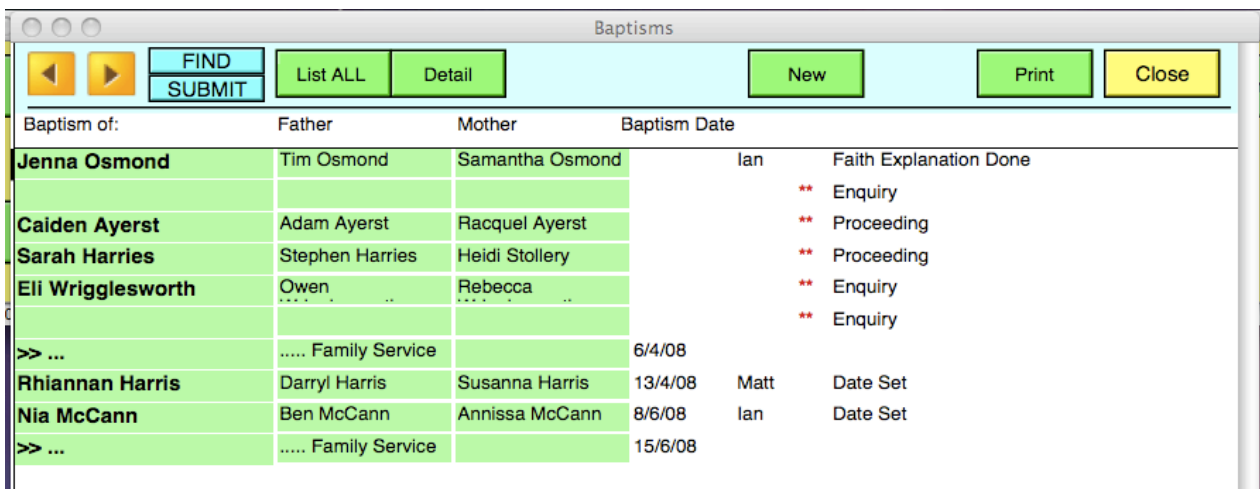
PM assists in tracking the status of Baptism enquiries and preparation. Once it is decided to proceed with the baptism beyond the enquiry stage, the child, mother and father are all added to PM known people.

### 7.1 List

The list screen is shown when the Baptism button is clicked on the Main Menu. It shows the list of current enquiries and baptisms under preparation. Baptisms marked as “Completed” or “Cancelled” are not included.

To show past baptisms, click on “List All”.

Click on any of the green fields in a particular line to take you to a Detail screen for that baptism.

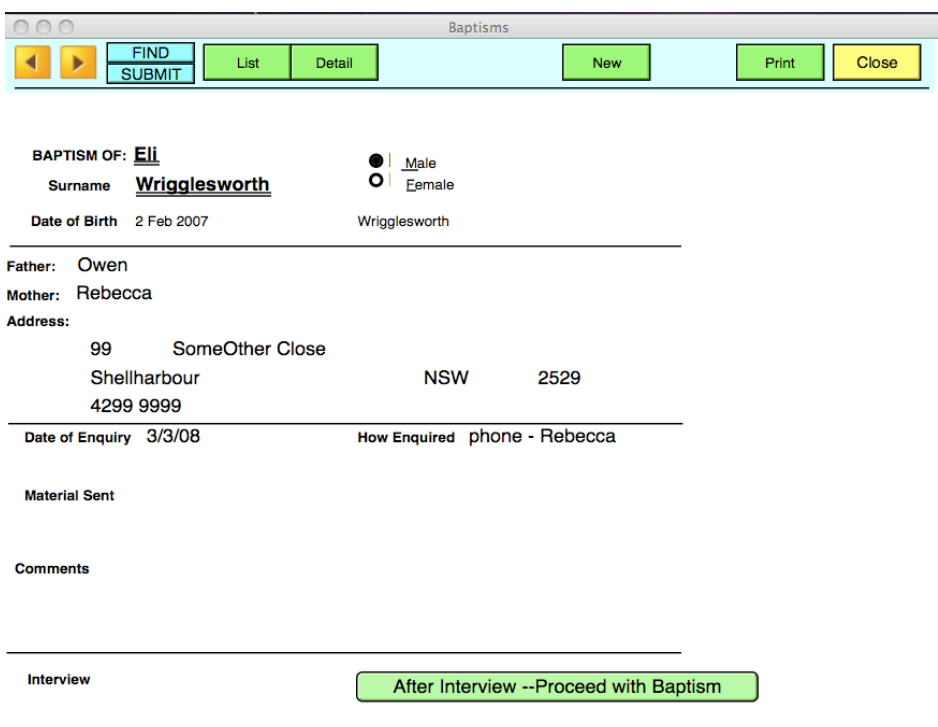


The screenshot shows a web application window titled "Baptisms". At the top, there are navigation buttons: "FIND" and "SUBMIT" (in a blue box), "List ALL", "Detail", "New", "Print", and "Close". Below the buttons is a table with columns: "Baptism of:", "Father", "Mother", "Baptism Date", and "Faith Explanation Done". The table contains several rows of data, with some cells highlighted in green. The rows are:

Baptism of:	Father	Mother	Baptism Date	Faith Explanation Done
Jenna Osmond	Tim Osmond	Samantha Osmond	Ian	Enquiry
Caiden Ayerst	Adam Ayerst	Racquel Ayerst		Proceeding
Sarah Harries	Stephen Harries	Heidi Stollery		Proceeding
Eli Wrigglesworth	Owen	Rebecca		Enquiry
>> ...	..... Family Service		6/4/08	Enquiry
Rhiannan Harris	Darryl Harris	Susanna Harris	13/4/08	Date Set
Nia McCann	Ben McCann	Annisca McCann	8/6/08	Date Set
>> ...	..... Family Service		15/6/08	

### 7.2 Detail

This detail screen will be displayed for Enquiries. Once it has been determined to proceed with preparation for the baptism, click on the “After Interview – Proceed with Baptism” button.



The screenshot shows a web application window titled "Baptisms" displaying the detail screen for a baptism. The window has a header with navigation buttons: "FIND" and "SUBMIT" (in a blue box), "List", "Detail", "New", "Print", and "Close". The main content area displays the following information:

**BAPTISM OF:** Eli  
Surname: Wrigglesworth       Male       Female  
Date of Birth: 2 Feb 2007      Wrigglesworth

---

Father: Owen  
Mother: Rebecca  
Address:  
99      SomeOther Close  
Shellharbour      NSW      2529  
4299 9999

---

Date of Enquiry: 3/3/08      How Enquired: phone - Rebecca

Material Sent

Comments

---

Interview

### 7.2.1 Proceed with Baptism

When you proceed with a baptism, PM ensures that each of the Child, Father and Mother become known to PM. To do this PM needs to link them into either an existing family or create a new family record. For each person the “New Person” screen is shown (see 5.6). If this is a new family, click on “New Family” for the Child definition. The family list for the Father will then show the new family, click on this line to link them to the same family.

Once the new record is made, the screen changes to the following baptism detail screen. More information such as God Parents can be recorded for the baptism.

**BAPTISM OF: Sam** Full Names: Samuel Eric  
Surname Palermo Date of Birth 14/01/2008  
Baptism Date 9/11/08 Baptism Time 9:45 AM

---

Father: Anthony Palermo Mother: Debra Palermo  
Job: Marketing Manager Job: Home Duties

Address:  
99 Something Street  
Somewhere NSW 2nnn  
9999 6666

---

Date of Enquiry 12/6/08 How Enquired Personal  
Staff Allocated Ian  
Material Sent Info & Questionnaire.  
They have undertaken to be regularly in church

Interview 15/08/2008 8pm Christianity Explained Previous  
GodParents Bill Bloggs Comments  
Mary Bloggs

Register Updated  
Welcome Card

### 7.3 New (Baptism)

The New button will open up a blank Enquiry Detail screen (7.2)

## 8 WEDDINGS

PM assists in tracking the status of Wedding enquiries and preparation. Once it is decided to proceed with the wedding beyond the enquiry stage, the bride and groom are added to PM known people.

### 8.1 List

The list screen is shown when the Weddings button is clicked on the Main Menu. It shows the list of current enquiries and weddings under preparation. Weddings marked as “Completed with payment” or “Cancelled” are not included.

To show past weddings, click on “List All”.

Click on any of the green fields in a particular line to take you to a Detail screen for that wedding.

as at 27/04/2008		Cel.	Music	!	30	Payment Rec'd	
Richardson	Parrino	8 Mar 2008	3:00pm	Matt	Not	Wedding Performed	\$50
James	White	28 Mar 2008	3:00pm	Matt	Not	Interviewed & Proceeding	
Hardy	Nelson	19 Apr 2008	3:30pm	Matt	GT?	Interviewed & Proceeding	\$50
Griffin	Dick	30 Aug 2008	2:30pm	Matt		Interviewed & Proceeding	\$50
Whittington	de Main	6 Sep 2008		Matt		Interviewed & Proceeding	\$50
Yarwood	Hussey	20 Sep 2008	11:00am	Matt		Interviewed & Proceeding	\$50
Murray	Kent	20 Sep 2008	2:30pm	Matt		Interviewed & Proceeding	\$50
Dunille	Haves	4 Oct 2008	2:00pm	Matt		Interviewed & Proceeding	\$50

### 8.2 Detail

This detail screen will be displayed for Enquiries.

**BRIDE:**  
Name:  Address:   
Phone:   
Conjugal Status:

**GROOM:**  
Name:  Address:   
His Street:   
Balarang NSW 2529  
42nn nmm  
Conjugal Status:

Requested Wedding Date & Time:   
Staff Allocated:

Comments:

Date of Enquiry:  How Enquired:   
Material Sent:

Interview:

On the enquiry screen, you can enter the names and addresses of the bride and groom and other enquiry information.

### 8.2.1 Copy address to other

There are two buttons to copy one party's address details to the other. Fill in the details of one and click on the button to copy it to the other.

### 8.2.2 Proceed with Wedding

Once it has been decided to proceed with wedding preparation, click on "Proceed with Wedding".

PM ensures that the Bride and Groom become known to PM. To do this PM needs to link them into either an existing family or create a new family record. For each person the "New Person" screen is shown (see 5.6).

Once the Bride and Groom are defined, a detail screen is displayed to allow you to enter more information concerning the wedding.

<input type="button" value="◀"/> <input type="button" value="▶"/> <input type="button" value="FIND"/> <input type="button" value="SUBMIT"/> <input type="button" value="List"/> <input type="button" value="Detail"/> <input type="button" value="New"/> <input type="button" value="Print"/> <input type="button" value="Close"/>	
<u>Someone</u> / <u>SomeoneElse</u> <span style="float: right;"><u>Saturday, January 24 2009</u></span>	
<p style="text-align: center;"> <input type="button" value="Copy Groom's Address to Bride →"/> <span style="margin-left: 200px;"><input type="button" value="← Copy Bride's Address to Groom"/></span> </p>	
<b>GROOM:</b> SomeoneElse <b>Steven</b> Address 0 His Street Balarang NSW 2529 4297 nnnn as Full Given Names Congugal Status Never Validly Married Birthplace (Town & State in Aust. OR Town & Country) Resident in Aust. (if born outside Aust.)      Years and      Months Date of Birth Father's Name Mother's Maiden Country of Birth      Father:      Mother:	<b>BRIDE:</b> Someone      nee Someone <b>Tania</b> Address 0 His Street Balarang NSW 2529 4297 nnnn as Divorced Years and      Months Father:      Mother:
Material Sent Notes Date      Saturday, January 24 2009      at      Forwarded Email enquiry to Matt on the 31/1/09	
Intention of Marriage Sighted Birth Certificates Numbers: Signed Declarations Consent Forms Completed Names for Service Number of Rings	Groom:      Bride: <div style="text-align: right; margin-top: 20px;"><input type="button" value="Make Couple Married"/></div>

### 8.2.3 Make Couple Married

To inform PM that these two people are now married, and therefore to be recorded as being in the one family, click on the “Make Couple Married” button. PM leads the user through a series of questions to determine what the new living arrangements are and where.

The bride’s maiden name is still available on the List screen (see 8.1) and on the Detail screen (see 8.2.2)

### 8.2.4 *Section removed version 13.0.1*

## 8.3 **New (Wedding)**

The New button will open up a blank Enquiry Detail screen (8.2)

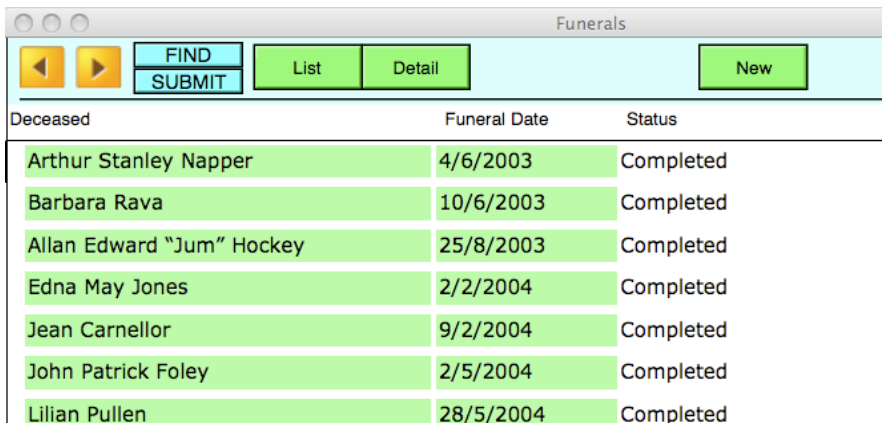
## 9 FUNERALS

PM assists in tracking the status of Funeral enquiries and preparation. The Contact Person for the funeral is added to PM known people.

### 9.1 List

The list screen is shown when the Funerals button is clicked on the Main Menu. It shows the list of current funerals under preparation. Funerals marked as “Completed” or “Cancelled” are not included.

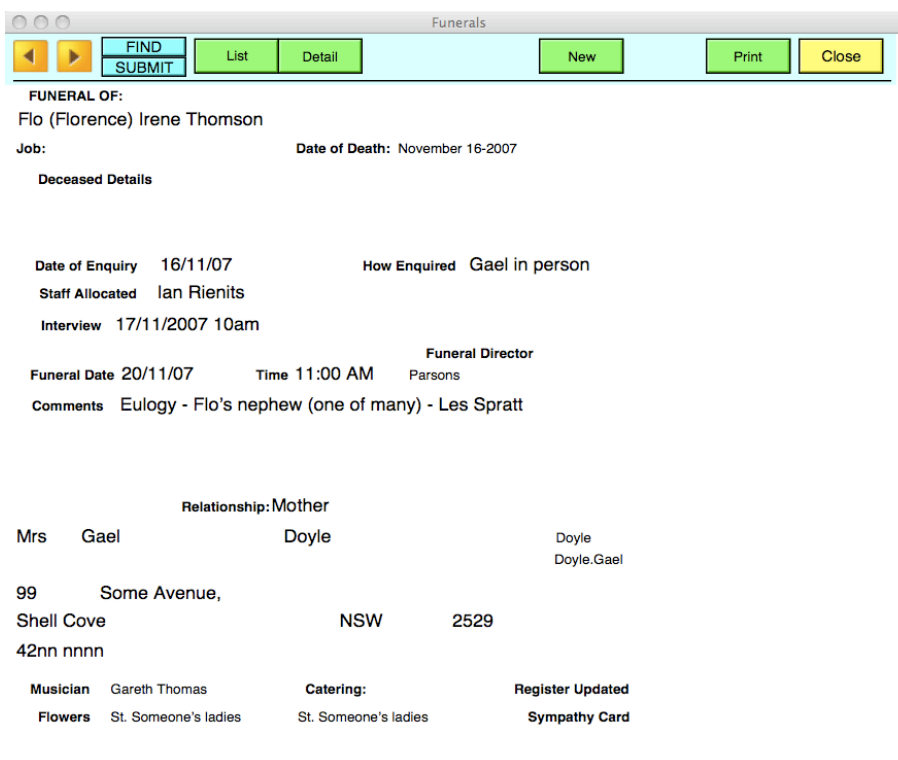
To show past funerals, click on “List All”. Click on any of the green fields in a particular line to take you to a Detail screen for that funeral.



The screenshot shows a web application window titled "Funerals". At the top, there are navigation buttons: a left arrow, a right arrow, a "FIND" button with a "SUBMIT" button below it, "List" and "Detail" buttons, and a "New" button. Below the buttons is a table with three columns: "Deceased", "Funeral Date", and "Status". The table contains seven rows of data, all with a green background for the "Status" column.

Deceased	Funeral Date	Status
Arthur Stanley Napper	4/6/2003	Completed
Barbara Rava	10/6/2003	Completed
Allan Edward "Jum" Hockey	25/8/2003	Completed
Edna May Jones	2/2/2004	Completed
Jean Carnellor	9/2/2004	Completed
John Patrick Foley	2/5/2004	Completed
Lilian Pullen	28/5/2004	Completed

### 9.2 Detail



The screenshot shows a web application window titled "Funerals" displaying the details for a funeral. At the top, there are navigation buttons: a left arrow, a right arrow, a "FIND" button with a "SUBMIT" button below it, "List" and "Detail" buttons, and "New", "Print", and "Close" buttons. The main content area is titled "FUNERAL OF:" and contains the following information:

Flo (Florence) Irene Thomson  
Job: Date of Death: November 16-2007

**Deceased Details**

Date of Enquiry 16/11/07 How Enquired Gael in person  
Staff Allocated Ian Rienits  
Interview 17/11/2007 10am

**Funeral Director**  
Funeral Date 20/11/07 Time 11:00 AM Parsons  
Comments Eulogy - Flo's nephew (one of many) - Les Spratt

Relationship: Mother  
Mrs Gael Doyle Doyle  
Doyle, Gael

99 Some Avenue,  
Shell Cove NSW 2529  
42nn nnnn

**Musician** Gareth Thomas **Catering:** St. Someone's ladies **Register Updated**  
**Flowers** St. Someone's ladies **Sympathy Card**

### 9.3 New (Funeral)

Clicking on the “New” button cause PM to create a new funeral record and to ensure that the Contact Person becomes known to PM. To do this PM needs to link them into either an existing family or create a new family record. The “New Person” screen is shown (see 5.6).

## 10 CHURCH SERVICES

PM can be used to plan church services, preaching series, bible readings, service running sheets, etc..

### 10.1 List

The list screen is shown when the “Church Services” button is clicked on the Main Menu. It shows the list of all services defined with a date greater or equal to the current date.

To show past services, click on the green button above “List ALL”.

Click on any of the green fields in a particular line to take you to a Detail screen for that service.

Services										
FIND		List ALL		Detail	Personnel	Music Smry	New	Music	Print	Close
SUBMIT										
9/1/11	8:00 AM	S'where	1	MP	The "Short Memories - Faithful God" Cycle		IR	Judges 2:6-19	Luke 14:15-24	
9/1/11	9:30 AM	Mt.S'by	1	W&HC+K	The "Short Memories - Faithful God" Cycle		IR	Judges 2:6-19	Luke 14:15-24	
9/1/11	9:30 AM	S'ville	1	PPP1	The "Short Memories - Faithful God" Cycle		IR	Judges 2:6-19	--	
9/1/11	10:00 AM	S'ville	2	HC1	Othniel, Ehud, Shamgar		DP	Judges 3:7-31	Luke 19:1-10	
9/1/11	11:00 AM	S'where	2	PPP2+K	Othniel, Ehud, Shamgar		DP	Judges 3:7-31	--	
9/1/11	4:30 PM	Mt.S'by	2	PPP2	Othniel, Ehud, Shamgar		DP	Judges 3:7-31	--	
9/1/11	5:00 PM	S'ville	3	MP	Deborah		IR	Judges 4	Luke 18:1-8	
9/1/11	7:15 PM	S'ville	3	PPP1+Bap	Deborah		IR	Judges 4	--	
16/1/11	8:00 AM	S'where	3	W&HC	Deborah		IR	Judges 4	--	
16/1/11	9:30 AM	Mt.S'by	4	HC2	Gideon		DP	Judges 7	Luke 18:9-14	
16/1/11	9:30 AM	S'ville	4	FamSrv	Gideon - Family Service		DP	Judges 7	--	
16/1/11	10:00 AM	S'ville	4	PPP1	Gideon		DP	Judges 7	--	
16/1/11	11:00 AM	S'where	5	MP	Abimelech		IR	Judges 8:22 - 9:21	Luke 18:18-30	
16/1/11	4:30 PM	Mt.S'by	5	W&HC+K	Abimelech		IR	Judges 8:22 - 9:21	--	
16/1/11	5:00 PM	S'ville	5	PPP2	Abimelech		IR	Judges 8:22 - 9:21	--	

## 10.2 Detail

The Detail screen allows you to record the various personnel required for the service, the bible readings, sermon topic, order of service, selected music, etc..

The church calendar day is filled in automatically from the PM lectionary (see 10.7)

		FIND		List	Detail	Personnel	Music Smry	New	Music	Lectionary	Close	
2007	Date	Jan 14	at	9:00 AM								Export Service Data ...
<b>Preacher</b>	IR	<b>PERSONNEL</b>		snits								
<b>Leader</b>	RSi	<b>PERSONNEL</b>		nfield								
<b>Celebrant</b>		<b>PERSONNEL</b>										
<b>Prayers</b>	2	<b>PERSONNEL</b>		Mark								
<b>Readings</b>		<b>PERSONNEL</b>										
	Ezekiel 1:4-28	<b>PERSONNEL</b>		Mark Johnstone								
	John 2:1-11	<b>PERSONNEL</b>		Peita de Song								
		<b>PERSONNEL</b>										
<b>Where</b>	St. Paul's											
<b>Musician</b>	Margaret	<b>PERSONNEL</b>		Margaret								
<b>Show Order</b>	MP - 9am	<b>PERSONNEL</b>		Ordinary 2								
<b>Special Note</b>	Introduce Matt Olliffe											
<b>Sermon</b>	Ezekiel - A Vision of God											
<b>Hymns:</b>	HTC 510	<b>PERSONNEL</b>		Lord, speak to me that I may speak (tune: Melcombe 270)								
	RTL 24	<b>MUSIC</b>		d is so Big								
	RoP 119	<b>PERSONNEL</b>		Majesty								
	HTC 209	<b>PERSONNEL</b>		Fairest Lord Jesus								
<b>Benediction</b>												

### PERSONNEL

The Preacher, Leader, Celebrant and Musician are recorded either by their predefined initials (see 5.7.3.4) or by their actual name. When entering any of these, the user is presented with a drop-down list of all those who have initials defined to PM. Selection can be made from the list or any other entry may be made.

The people noted for Prayer and Bible Readings are filled in either manually or by the rostering system of PM (see 13).

### MUSIC

PM maintains a list of known songs / hymns. Each item can have multiple references to the music books in which it may be found. Entering the reference code in the left column of the music selection will cause PM to fill in the title if that particular reference code is known. Four brackets of three songs plus a single benediction song can be entered.



10.2.1 *This function was removed in version 18*

## 10.2.2 Export Services Data

This function is available to both Web Browser users and FileMaker Pro users.

In order to prepare lists from the PM database for the user to merge into Service Running Sheets or to format in ways different from the standard PM formats, this function will export to a file some basic information about the services in the current “found set”.

The number below the “Export Services Data ...” button is the number of services in the current “found set”. This function will ask the user whether the complete “found set” is to be exported, or just the current service.

The exported data is held on the user’s local computer and not on the Parish Manager Server and is no longer password protected. Administrators should ensure this data is secure.

This file can be of a number of formats.

Use the “Merge” format to obtain a file suitable for doing a Mail Merge in Microsoft Word – a suggested method of making Service Running Sheets.

Use the “Comma Separated Values” format to enable applications such as EXCEL to easily read the file.

When this function is used from a Web Browser, the file with the exported data is downloaded to the standard Download folder of the relevant browser being used.

### 10.3 Personnel

When allocating personnel to multiple services, it can be more convenient to view the services as a list. Entries can be made into the Preacher, Leader, Celebrant and Musician field as per the detail screen (10.2). Communion Assistant and Prayers fields can be filled in by the rostering system of PM (see 13).

Services									
FIND		List	Detail	Personnel	Music Summary	New	Music	Print	Close
SUBMIT									
Apr 13 2008		Preach	Rdr	Cel	Assists	Music	Prayers		
27/4/08	St. 9:45 AM	W&HC+K	PD	RSi	PD	K-	School Hols		
27/4/08	St. 6:45 PM	PPP2	PD	MO		K-Geoff,	School Hols		
4/5/08	St. 8:00 AM	HC1	MO	PD	PD		Women's Weekend Away LSL		
4/5/08	St. 9:45 AM	PPP1+K	MO	DWil			Women's Weekend Away LSL		
4/5/08	St. 6:45 PM	PPP1	MO	RK			LSL		
11/5/08	St. 8:00 AM	MP	MO	RSu			LSL		
11/5/08	St. 9:45 AM	PPP2+K	MO	MO			LSL		
11/5/08	St. 6:45 PM	W&HC	MO	RK	MO		LSL		
18/5/08	St. 8:00 AM	HC2	DWil	MO	MO		LSL		

### 10.4 Music Summary

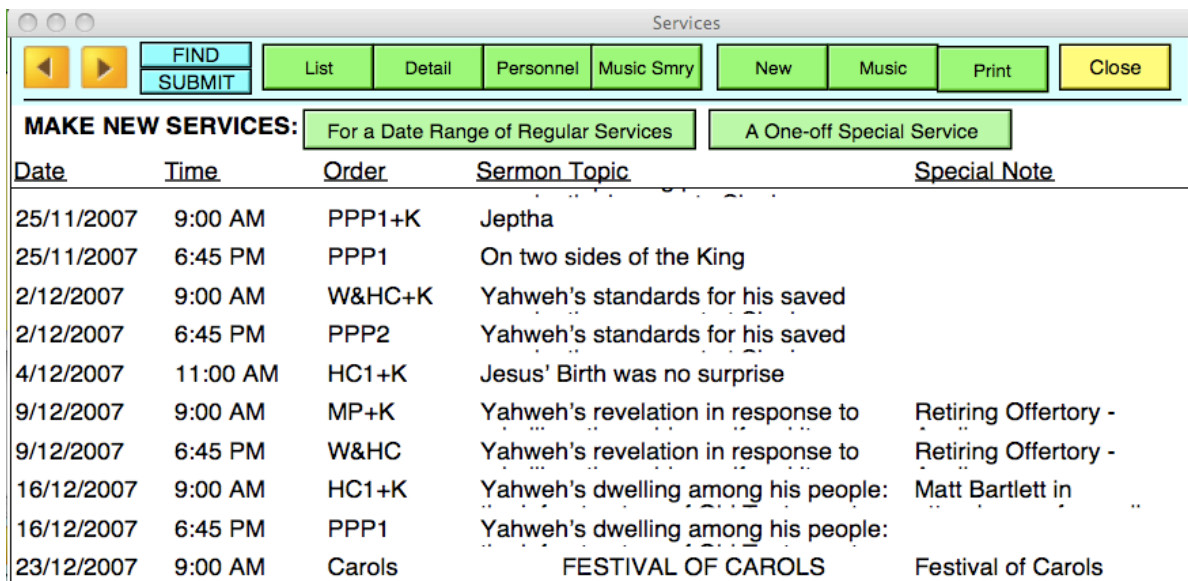
The music selections for a group of services can be printed on a "Music Summary". The following is a sample of the screen once it is sorted appropriately and printed.

Apr 12 2008			
<b>Apr 23</b>	<b>8:00 AM</b>	<b>MP - 9am</b>	
<b>Musician</b>			
HTC 174		Crown him with many crowns	
ES 52		Jesus is the King	
ES 44		Consider Christ	
HTC 550		May the mind of Christ my Saviour	
HTC 7		Holy, holy, holy, Lord God Almighty!	
<b>Feb 24</b>	<b>8:00 AM</b>	<b>MP</b>	
<b>Gael</b>			
HTC 203		All hail the power of Jesus' name	
HTC 7		Holy, holy, holy, Lord God Almighty!	
HTC 194		I cannot tell why	
HTC 328		Lord for the years	
<b>Mar 2</b>	<b>8:00 AM</b>	<b>HC1</b>	
<b>Edna Grant</b>			
HTC 501		The church's one foundation	
		No singing here today	
HTC 28		Amazing Grace	
HTC 418		My God now is your table spread	
HTC 140		Praise to the Holiest	
<b>Mar 9</b>	<b>8:00 AM</b>	<b>MP</b>	
<b>Gael</b>			
HTC 351		Stand up and bless the Lord	
HTC 446		We trust in you, ...	
HTC 46		Through all the changing scenes of life	
HTC 373		What a Friend we have in Jesus	
<b>Mar 16</b>	<b>8:00 AM</b>	<b>HC2</b>	
<b>Gael</b>			
HTC 170		Alleluia, sing to Jesus	
HTC 119		Ride on, ride on in majesty	
HTC 516		Jesus shall reign where'er the sun	
HTC 260		Great is Your Faithfulness	
<b>Mar 23</b>	<b>8:00 AM</b>	<b>HC1</b>	
<b>Gael</b>			
HTC 155		Jesus Christ is risen today	
		(No singing here today)	
HTC 169		I know that my redeemer lives	
HTC 209		Fairest Lord Jesus	
HTC 158		Low in the grave he lay	
<b>Mar 30</b>	<b>8:00 AM</b>	<b>HC1</b>	
<b>Gareth</b>			
HTC 528		Guide me, O my great Redeemer	
HTC 452		And can it be	
HTC 110		Blessed are the pure in heart	
HTC 217		Love divine, all loves excelling	
<b>Apr 6</b>	<b>8:00 AM</b>	<b>HC1</b>	
<b>Gareth</b>			
HTC 445		Safe in the shadow of the Lord	
HTC 340		God of gods, we sound his praises	
HTC 417		Lord Jesus Christ, you have come to us	
HTC 354		Sing praise to the Lord!	
<b>Apr 13</b>	<b>8:00 AM</b>	<b>MP</b>	
<b>Edna Grant ?</b>			
HTC 42		Tell out my soul	
HTC 515		Revive your church, O Lord	
HTC 33		Now thank we all our God	
HTC 213		Jesus! the name high over all	
<b>Apr 20</b>	<b>8:00 AM</b>	<b>HC2</b>	
<b>Gael</b>			
HTC 438		Jesus, lover of my soul	
HTC 182		The head that once was crowned with thorns	
HTC 120		All glory, praise and honour	
HTC 430		How firm a foundation	

## 10.5 New (Church Service)

The “New” button of Services takes the user to the following screen. This allows very basic information to be entered about any new services that are being created.

To create a group of church services for a particular date range, click on “For a Date Range of Regular Services”. (see 10.5.1)



The screenshot shows a window titled "Services" with a menu bar containing "List", "Detail", "Personnel", "Music Smry", "New", "Music", "Print", and "Close". Below the menu bar, there are two buttons: "FIND" and "SUBMIT". Underneath, there are two options for "MAKE NEW SERVICES": "For a Date Range of Regular Services" and "A One-off Special Service". Below these options is a table with the following columns: "Date", "Time", "Order", "Sermon Topic", and "Special Note".

Date	Time	Order	Sermon Topic	Special Note
25/11/2007	9:00 AM	PPP1+K	Jeptha	
25/11/2007	6:45 PM	PPP1	On two sides of the King	
2/12/2007	9:00 AM	W&HC+K	Yahweh's standards for his saved	
2/12/2007	6:45 PM	PPP2	Yahweh's standards for his saved	
4/12/2007	11:00 AM	HC1+K	Jesus' Birth was no surprise	
9/12/2007	9:00 AM	MP+K	Yahweh's revelation in response to	Retiring Offertory -
9/12/2007	6:45 PM	W&HC	Yahweh's revelation in response to	Retiring Offertory -
16/12/2007	9:00 AM	HC1+K	Yahweh's dwelling among his people:	Matt Bartlett in
16/12/2007	6:45 PM	PPP1	Yahweh's dwelling among his people:	
23/12/2007	9:00 AM	Carols	FESTIVAL OF CAROLS	Festival of Carols

### 10.5.1 Make new services: for a date range of regular services

For this function to work, the user needs to have defined what church services are to be known to PM. (see 17.1)

Once the button is clicked, the user is prompted for a start date and a finish date for the group of services to be created. Once these are entered and the function proceeds, the new records are created, determined by the Service Definitions (17.1). The user is then returned to the New Services display (10.5) to begin filling in details for these new services.

### 10.5.2 Make new services: a one-off special service

Clicking this button will cause PM to make a blank service record and change the screen to the Detail screen (10.2) where the user can enter date, time and other details.

## 10.6 (see 11 below)

## 10.7 Lectionary

This button is only available on the church services Detail screen (10.2). It allows the user to view the predefined church calendar provided with PM.

### 10.7.1 Make Year

The “Make Year” button is only available on the Lectionary screen. It allows the Administrator User, only, to generate a year of church calendar into the Lectionary data. The user is prompted for the year of the beginning Advent Sunday, and then the date of the following Easter Day. From this information a year’s calendar is generated and added to the Lectionary data.

**11 MUSIC** – this button was removed from the Main Menu in Version 18

PM maintains a list of known music. Each song / hymn can have multiple references to the music books in which it can be found.

The box in the lower right shows the dates and times of church services known to PM in which this song / hymn has been used.

The information in the upper right shows the music selections for one church service, the date and time of which are shown in the title. The user can move through the defined church services using the Previous and Next buttons.

While the Music screen is displaying a particular song, clicking in the abbreviation column (left hand) of the church service information will show a drop down list of the music sources for this particular song. Selecting one will place that song in that position in the church service currently shown.

The screenshot shows the 'Music' application window. At the top, there are navigation buttons (Previous, Next), 'FIND' and 'SUBMIT' buttons, and 'New', 'Music List', 'Print', and 'Close' buttons. The main form displays the title 'How deep the Father's love' with the number 294. Below the title are fields for Author, Copyright, Rating (3), Known, and Style (4). A 'Sources' table lists 'Src 185', 'ES 51', and 'PKW 26'. There are also fields for Topics, Bible Ref, Limits, MIDI File, Overhead, and Metre. The 'Notes' field contains 'NotDR' and 'PKW 26 Too fast ?? (maybe add a vocal lead to it?)'. On the right, a service selection panel shows '28/9/08' at '9:45 AM' with a list of service items including 'Amazing Love (My Lord, what)', 'How deep the Father's love', 'May the mind of Christ my', and 'Lord, be my vision (Be thou my)'. At the bottom right, a 'Last used' table shows a list of dates and times from 25/1/2009 to 15/4/07.

Last used: 25/01/2009	
25/1/09	5:00 PM
28/9/08	9:45 AM
10/8/08	9:45 AM
27/7/08	6:45 PM
20/7/08	9:45 AM
18/5/08	9:45 AM
18/5/08	6:45 PM
18/5/08	6:45 PM
18/5/08	9:45 AM
16/3/08	6:45 PM
9/3/08	9:45 AM
27/1/08	9:00 AM
16/12/07	9:00 AM
16/12/07	6:45 PM
30/9/07	6:45 PM
22/7/07	6:45 PM
8/7/07	9:00 AM
15/4/07	6:45 PM

## 11.1 Music List

The songs / hymns known to PM can also be viewed in a list form. Using the Find and Sort buttons on this screen can assist the user to make music selections. As with the Music screen, entries can be made directly into the church services as required.

Firstly click on the line of the song required, then click in the Abbreviation Column of the song position desired in the service, make your selection from the drop-down list shown.

Music				
htcs 10	Come let us worship Christ	htc 446	We trust in you, ...	<input type="button" value="◀"/> <span style="margin-left: 20px;"><b>9/1/11</b> Service Date</span> <span style="margin-left: 20px;"><b>10:00 AM</b> Service Time</span> <input type="button" value="▶"/>
	No singing here today	htc 44	The king of love my shepherd is	htc 212   I will sing the wondrous story

MUSIC LISTING					
<input type="button" value="◀"/>	<input type="button" value="▶"/>	<input type="button" value="FIND"/> <input type="button" value="SUBMIT"/>	<input type="button" value="Music"/>	<input type="button" value="Print"/>	<input type="button" value="Close"/>
TITLE	<input type="button" value="Sort"/>	LAST USED	<input type="button" value="Sort"/>	STYLE	
The Lord is present in his sanctuary	<input type="button" value="&gt;"/>	19/12/2010		PKW 40	
Spirit of Holiness	<input type="button" value="&gt;"/>	2/01/2011		HTC 246	
Come let us worship Christ	<input type="button" value="&gt;"/>	9/01/2011	3	HTCS 10	
Count Your Blessings	<input type="button" value="&gt;"/>	9/01/2011		PKW 16	
God Our Father	<input type="button" value="&gt;"/>	9/01/2011		RTL 10	VT 1.11
We trust in you, ...	<input type="button" value="&gt;"/>	9/01/2011	1	HTC 446	
Your kingdom come, O God!	<input type="button" value="&gt;"/>	23/01/2011		HTC 334	PKW 72
He leadeth me	<input type="button" value="&gt;"/>	30/01/2011		PKW 74	
Holy	<input type="button" value="&gt;"/>	30/01/2011		EMUL2 8	VT 2.01 PKW 25

## 11.2 Update Last Used Dates

This function is carried out automatically by PM. Note: after an update of PM, the first operations of Music and Music List will be slow due to the Last Used Dates for all music being recalculated.

## 12 ROSTERS

PM Rostering integrates the Services / Groups Definitions (17.1), Church Services (10) and People Rosters (5.5.5). Rosters are generated using the Rostering function (13).

When the "Rosters" button on the Main Menu is clicked, the currently generated rosters for a month from the current date are displayed. No new rosters are generated by this function.

### 12.1 Show a month

This screen shows one service on one day at a time. They are ordered by date and within that date by the defined display order of the particular services (see 17.1).

The roster titles are taken from the Service Definitions (17.1) and the service information on the left is taken from the Services record (10.2).

The names of those rostered are able to be changed on this screen.

The screenshot shows a window titled "View Rosters" with the following content:

**2012**      **St Someone's, Somewhere**      **Prayer Book 8:00am**

---

**March 18**

HC1 Lent 4	<u>Prayer</u> Ruth Gelding	<u>Morning Tea</u> Jake Barnes Jim Cheetham
---------------	-------------------------------	---

Preacher:  
Ian Rienits  
Deut 18:1-13

---

<u>Bible Reader</u> Cheryl Dixon Peter Dixon	<u>Welcomer</u> Trevor Blissett-Walker James Crichton
--	---

John 15:18-16:4a

---

Service Leader:  
Ben Hutchinson

---

<u>Sound System</u> Natalie Condran
--

Celebrant:  
Vince Aleckson

---

<u>Sides Person</u> Gwyn Farrugia Carol Howells	<u>Holy Communion</u> Sonia Heffernan
---	--

---

At the bottom of the window, there are several buttons:

- Previous
- Next
- DISTRIBUTE (Email & Print)
- Close
- Show a range of weeks
- PRINT a range of weeks
- SUBMIT
- Help

## 12.2 Show a range of weeks

The default date range is from the current date for a month. Clicking on “Show a range of weeks” allows the user to enter some other range, such as a calendar month, or a particular date.

The following dialog screen is displayed. This is also used for the “PRINT a range of weeks” (12.3) and “DISTRIBUTE” functions (12.4).

## 12.3 Print a range of weeks

The formatting of the printout allows for multiple weeks to be displayed on one A4 sheet. It is helpful to note the order of printing the rosters for each service when defining the rosters in Service Definitions (17.1). Blanks can be left and paired rosters can be put together by defining the rosters in a thoughtful order.

Of particular note should be the Prayer roster and the two Bible Reader rosters. By placing them in roster positions 1,2 & 3, they are conveniently located with the Service Reader and Preacher and the Bible Readings on the printout.

The number to the left of “Prayer” is a prayer cycle indicator – it is entered on the Service Detail screen (10.2)

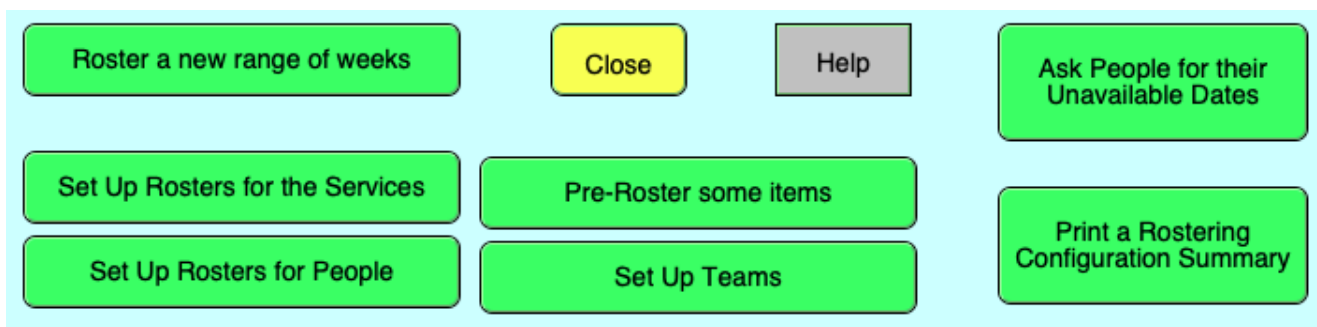
2012	Prayer Book 8:00am	St Someone's, Somewhere					
<b>March 18</b> HC1 Lent 4	<b>Leader:</b> Ben Hutchinson <b>Preacher:</b> Ian Rienits Deut 18:1-13 John 15:18-16:4a <b>Celebrant:</b> Vince Aleckson	<b>5 Prayer</b> Ruth Gelding ----- <b>Bible Reader</b> Cheryl Dixon ----- <b>Bible Reader</b> Peter Dixon	<b>Sides Person</b> Gwyn Farrugia Carol Howells	<b>Morning Tea</b> Jake Barnes Jim Cheetham	<b>Welcomer</b> Trevor Blissett- Walker James Crichton	<b>Sound System</b> Natalie Condran	<b>Holy Communion Assistant</b> Sonia Heffernan
<b>March 25</b> Lent 5	<b>Leader:</b> Ian Rienits <b>Preacher:</b> John Boardman	<b>6 Prayer</b> Sonia Heffernan ----- <b>Bible Reader</b> Faye Heaney ----- <b>Bible Reader</b> Jo Henley-Martin	<b>Sides Person</b> Ben Hutchinson Carol Howells	<b>Morning Tea</b> Helen Farmer Val Fielding	<b>Welcomer</b> Cheryl Donaghy Ruby Feiss	<b>Sound System</b> Vince Aleckson	
<b>April 1</b> Palm Sunday	<b>Leader:</b> Peter Dixon <b>Preacher:</b> Ian Rienits	<b>1 Prayer</b> Ben Hutchinson ----- <b>Bible Reader</b>	<b>Sides Person</b> Joe Houllison Gwyn Farrugia	<b>Morning Tea</b> Marlene Cunynghame John Harriman	<b>Welcomer</b> Debbie Dorin Breanna Van Kempen	<b>Sound System</b> Carol Howells	<b>Holy Communion Assistant</b> Jo Henley-Martin

## 12.4 Distribute (Email & Print)

The printed version of the selected date range will be emailed to all people who volunteer for rosters for each particular service. To receive the rosters by email the person must have “Rosters by Email” checked on the person’s Rosters screen (see 5.5.5) and the person must have a Primary Email address defined (see 5.1). A paper copy can be printed for any who will not receive it by email. The printouts are personalised, with the rosters for that person individually highlighted.

## 13 ROSTERING

When the “Rostering” button is clicked on the Main Menu, the following Rostering Menu screen is displayed.



Before using the “Roster a new range of weeks” function, the following should be set up

Service Definitions	see 17.1	Define the services to be rostered Define the rosters for each of these services
People Rosters	see 5.5.5	For each volunteer, define which rosters
Personnel Initials	see 5.7.3.4	For each person who may be selected as Service Leader, Preacher, or Celebrant
Services	see 10.5	Make a service record for each service to be rostered, specifying the Leader, Preacher etc.

NOTE: The HELP button on this page assembles the User Manual pages for these various sections into a single file for convenient access.

### 13.1 Set Up Rosters for the Services

This button displays the Service Definitions screen to allow the definitions to be made or altered (see 17.1). When that screen is closed, the Rostering Menu screen is again displayed.

### 13.2 Set Up Rosters for People

This button displays the People Rosters screen to allow the volunteers for various rosters to be made or altered (see 5.5.5). When that screen is closed, the Rostering Menu screen is again displayed.

See below for “Pre-Roster some people”, “Set Up Teams”, “Ask about Unavailable Dates” and “Configuration Summary” buttons descriptions (see 13.4-7).



### 13.3 Roster a new range of weeks

This button will present the user with the following dialog to allow the entry of the desired dates to be rostered. The rostering will proceed for all services enabled for rostering within the date range. This will include special services (i.e. Good Friday) if they have been defined.

The screenshot shows a window titled "Parish Manager". On the left, there are two input fields labeled "STARTING DATE" and "ENDING DATE". Below these is a "Submit Dates" button. In the center, there is a text prompt: "Enter the beginning and ending dates of the weeks to be created". On the right, there is a "Main Menu" button.

150 Browse

During the rostering, the user will be prompted as required.

For each week, the user will be asked whether the particular date is a Holiday or not. This allows PM to take account of the various restrictions that the people and service definitions require. (see 5.5.5 and 17.1)

If a person has a "Check before rostering" item, PM asks the user whether the particular person is eligible for a particular roster on a particular date, due to the check that has been defined. (see 5.5.5)

The rostering proceeds through each date in the date range and each rostered service in turn.

### 13.4 Pre-Roster some people

To force a particular person to be rostered to a particular role on a particular day, click on this button and then fill in the data on the following screen. When that screen is closed, the Rostering Menu screen is again displayed.

Date	Service Name	Roster	Leave the name blank	Name	
12/01/2020	Evening	Supper	<input type="checkbox"/>	Vince Aleckson	<input type="button" value="-"/>
19/01/2020	Prayer Book	Holy Communion Assistant	<input type="checkbox"/>	Jo Henley-Martin	<input type="button" value="-"/>

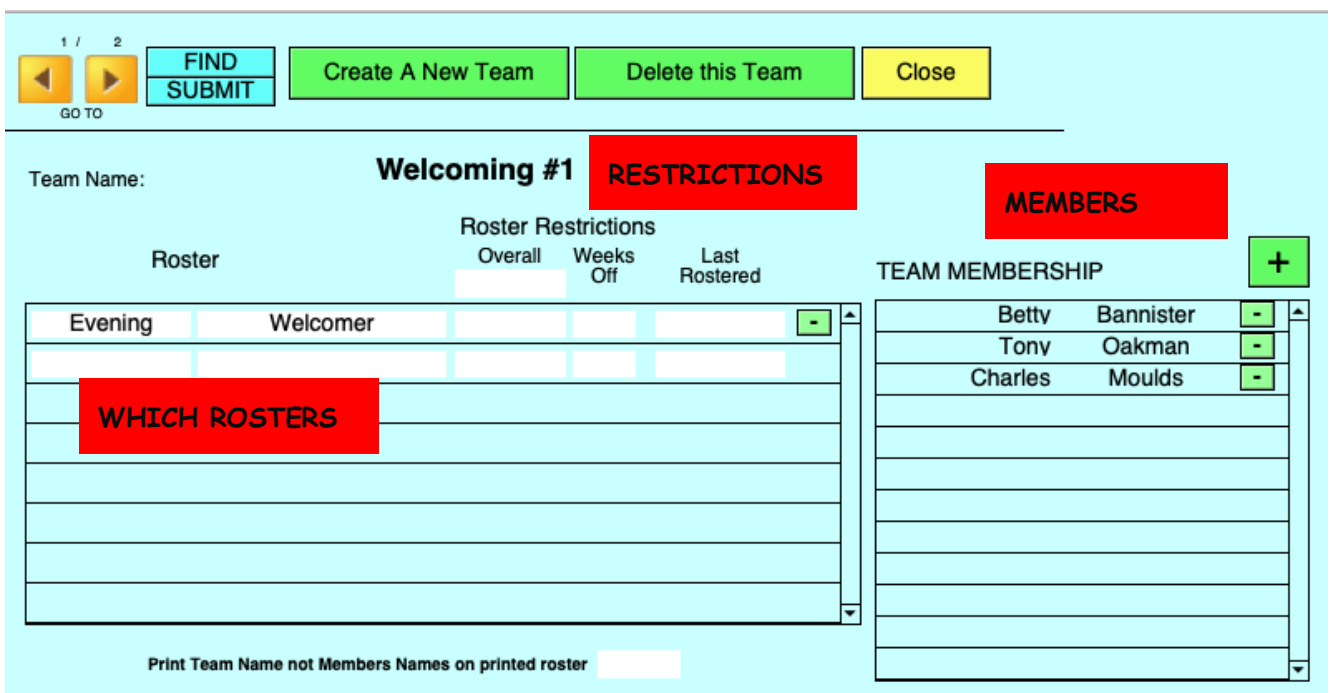
## 13.5 Set Up Teams

Team Rostering enables the user to define any number of teams and have those teams volunteer for one or more rosters. For a team to be successfully rostered, the team and a user-defined minimum number of its members must be volunteering for the particular roster, and must be available. If the required number members is not available (due to conflicting rosters, or being away, etc.) then the team will not be eligible to be rostered on that date.

When the “Set Up Teams” button is clicked, the following screen is displayed, with a list of the currently defined teams.



Click on a “Select” button or “New Team”, then fill in the rosters, restrictions, etc. and the membership of the team on the screen that is then displayed.



### WHICH ROSTERS

To note this team volunteering for a particular roster, click on an entry under “Roster” and select the appropriate Service & roster combination from the drop-down list

Add more rosters by filling in multiple lines.

## RESTRICTIONS

PM allows you to place restrictions on rostering this team on a per roster basis, and on an overall basis.

### OVERALL RESTRICTIONS

In this field you note the weeks of the month (1, 2, 3, 4, 5) and the Holiday (H) or Non-holiday (N) seasons that this team is unavailable for any rosters.


Restrictions can be entered in any order but must have spaces between them. For example 1 3 H would indicate that this team is not available for rostering on any 1<sup>st</sup> or 3<sup>rd</sup> Sunday of the month and they are not available at all during Holidays.

### INDIVIDUAL ROSTER RESTRICTIONS

The same restriction codes can be entered on the corresponding lines of individual rosters. This allows a high degree of control over when this team may be rostered for a particular role. It would be possible for a team to volunteer for rosters on two different morning services and to indicate which weeks they are available for which service, say 1<sup>st</sup>, 3<sup>rd</sup>, and 5<sup>th</sup> Sundays at the first service and 2<sup>nd</sup> and 4<sup>th</sup> at the second.

Note that if no restrictions are noted, PM will assume that this team is available for each and every one of their nominated rosters every week. This is the default position and gives the rostering system the widest choice of teams to roster.

## MEMBERS

Add members to this team with the  button, remove members from the team with the  button.

## 13.6 Print a Rostering Configuration Summary

This function will produce a printout summarising the current configuration of the rostering system, including defined incompatibilities, restrictions, repeats, and team memberships.

A sample of the printout:

Robyn Leon	H N
Trevor Blissett-Walker	1 3 5
<hr/>	
Holy Communion Assistant ( Evening )	
	1 3 4 5
	INCOMPATIBLE WITH: Sides Person / Supper / Welcomer / Sound System / Holy Communion Assistant / Meal / Overhead Projector / Leader / Celebrant
Cheryl Donaghy	
John Boardman	
Trevor Blissett-Walker	
<hr/>	
Meal ( Evening )	
	H
	INCOMPATIBLE WITH: Prayer / Bible Reader / Sides Person / Supper / Welcomer / Sound System / Holy Communion Assistant / Meal / Overhead Projector / Leader / Preacher / Celebrant
Andrew Crisp	H
Darren Smith	
Jake Barnes	H N
	Evening Meal only during Daylight Saving Time
John Boardman	
Kirrily Eagleton	2 3 4 5
Mark Wilson	1 3 5
Natalie Gilbert	2 4
Phil Burrell	N H
<hr/>	
Overhead Projector ( Evening )	
	INCOMPATIBLE WITH: Prayer / Bible Reader / Sides Person / Supper / Welcomer / Sound System / Holy Communion Assistant / Leader / Preacher / Celebrant
Ella Leitch	
Genevra Litchfield	Age

## 13.7 Ask People for their Unavailable Dates

Once the Services (dates and times) have been set (see 10.5), this function is used to send an email to all those who have volunteered for at least one roster, and have a defined Primary Email address.

This email contains a link for the recipient (unique to them) to click on which will allow them to indicate what dates if any they are unavailable for rostering. The information they provide by this means is entered directly onto their specific "Rosters" page.

This should be done with enough time for them to respond before the actual rostering of those weeks is initiated.

14 *Section removed version 13.0.1*

15 *Section removed version 13.0.1*

16 *Section removed version 13.0.1*

## Parish Setup

					<b>Help</b>
<b>SUBMIT</b>	Service / Group Definitions	Change Password	Maintenance	Close	

---

Parish Name	St Someone's, Somewhere		
Name Tag Top Lines	Anyone and Everyone		
Name Tag Bottom Lines	is WELCOME!		
Wedding Enquiry Lapse Days	30		
Expected Attendance Rate	57%		
Enable SMS Messaging			
Enable Auto SM n WWCC Alerts	YES	support@parish-software.net	

On this screen some Parish-wide information is entered, and the buttons allow the user to define the Church Services and Groups to be know by PM, and to change the users and passwords to gain access to PM.

- Parish Name            appears on various printed reports and on the Main Menu
- Name Tag Lines        can be entered here or on the Name Tag screen (see 5.5.6)
- Wedding Enquiry Lapse Days  
this determines whether an Enquiry is shown as "Lapsed" on the Weddings List screen (see 9.1), the value can also be changed on that screen.
- Expected Attendance    This figure is used to initialise the attendance records for this person so that the trending calculation (see 5.3) has a base from which to work. Once the PM roll marking (see 7.1) has been in use for some time, the default figure set by PM is the current average attendance of all who are on the roll to attend services.
- Enable SMS Messaging    Clicking on this field will turn SMS Messaging capability on or off. This can only be done by a Supervisor User. To turn SMS Messaging on, a User Name and Password is required for SMSGlobal. (See 5.7.2.4)
- Enable Auto SM n WWCC Alerts    Clicking on this field will turn automatic reports of those involved in children's ministry on or off. This can only be done by an Authorised User. To turn the reports on, an email address to receive the reports must be supplied. (See 5.7.4.5)

## 17.1 Service / Group Definitions

Each regular gathering is defined to PM using this screen. This must be done before people can be shown as members of a group or attending a service. It must also be done before the rostering function is run.

### Services and Groups Definitions

◀
▶
NAME etc.
Group Definition
Close
FIND
SUBMIT
Help

Evening	Church
Prayer Book	Church
	Church
	Church
Sunday 8:30	Church

- Title **Evening**  
 Time **7:15pm** Day **Sunday**  
 Enable Rostering for this Group / Service

Type **Church Service**  
RESTRICTIONS

OPTIONS
 Care Network Giving Group

Print Position	Incompatible Status	Roster Edit	Roster	Repeat	Team	Req	Prior	SMS	Restricts	Fill Order	Print Position	SMS
	<input type="checkbox"/>	<input type="checkbox"/>	Leader									<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	Preacher									<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	Celebrant									<input type="checkbox"/>
1	<input type="checkbox"/>	<input type="checkbox"/>								8	V	<input type="checkbox"/>
2	<input type="checkbox"/>	<input type="checkbox"/>	ROSTER NAMES							9	^ V	<input type="checkbox"/>
3												
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sides Person	2						4	^ V	<input type="checkbox"/>
5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Supper							1	^ V	<input type="checkbox"/>
6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Welcomer							6	^ V	<input type="checkbox"/>
7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sound System							2	^ V	<input type="checkbox"/>
8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Holy Communion Assistant						1 3 4 5	7	^ V	<input type="checkbox"/>
9												
10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Meal						H	3	^ V	<input type="checkbox"/>
11	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Overhead Projector							5	^ V	<input type="checkbox"/>
12												
13			INCOMPATIBLES									
14												
15												
16												
17												
18												
19												
20												

Message to appear at foot of printed rosters

### NAME etc.

- Title            Any descriptive title (it is best to avoid using numerals in this field)
- Type            Select a type of gathering from the drop-down list  
(Church Service, Bible Study, Adult, Youth, Children, Other)
- Time            Starting time of the gathering
- Location        Any descriptive location. A drop-down list shows all the locations currently defined for other gatherings – choose one of these or enter a new one.

## OPTIONS

Check the “Enabled for Rostering” box if PM is to include this group in the rostering function. Any type of group or service can be set for rostering.

Check the “Care Network Giving Group” box if PM is to regard this group one which can be expected to deliver pastoral care to its members by other members of the group. See the Care Network screen description 5.5.7.

## ROSTER NAMES etc.

Up to 20 Roster Names can be defined for each gathering. It is useful to consider the order in which they are specified. See the notes in 12.3.

To be consistent with the printed rosters produced by PM, Prayer and Bible Readers should be placed as entries 1, 2 & 3.

A number in the **Repeat** column beside a particular roster specifies the number of people required for this roster each week. A blank is the same as a 1.

If this roster is to be filled by a team, not individuals, check the **Team** box for that roster. The minimum number of members of a team required to be available can be set in the **Req** column. If this is blank the whole team must be available for the team to be rostered.

The **Prior** column is for a future feature.

The **SMS** column specifies that this roster is to be notified by SMS to the people rostered on the Friday before the particular Sunday service. NOTE: The Leader, Preacher and Celebrant have separate SMS checkboxes on the right of the screen.

The **Fill Order** is set up by PM. It indicates the order in which the rosters for this service will be filled. PM attempt to fill the most difficult rosters first.

Using the **∧** and **∨** arrows, the printing order of the rosters can be changed.

## INCOMPATIBLES

The first to columns of boxes display and control the Incompatibilities between rosters. For example someone rostered on the Creche roster cannot be also rostered as for Prayer or Bible Reader on the same Sunday.

Indicate an incompatibility by checking the box at the intersection of the two Rosters on the grid. The reverse relationship is automatically checked on the grid.

The first column (showing some red boxes) indicates which rosters a incompatible with the selected (yellow) roster.

So, showing above, “red box” rosters are incompatible with the person leading the service.

If you click a box in this column, then you can see which rosters are incompatible with the newly selected roster.

The second column boxes allow you to change the compatibility status between the current (yellow) selection and the roster in the row in which the second column box was clicked.



## RESTRICTIONS

In the **Restricts** column you note the weeks of the month (1, 2, 3, 4, 5) and the Holiday (H) or Non-holiday (N) seasons that this roster should not be filled.

### 17.1.1 New service or group definition

This button will create a new definition and allow you to enter the information using the above screen.

## 17.2 Change Password

Each user can change their own password. This does not change the level of access for this user, just their password.

PM implements four levels of access, plus “Supervisor” (see 20).

Enter the new password twice as requested and click on “Make Password Change”. Note: the password you type will be seen in clear text as you type it. Be aware that observers could see your password at this point. Your password will not appear in clear text at any other place in PM.

Please enter your new password twice.  
Passwords should be at least 4 characters long.

NEW Password	<input type="text"/>	Make Password Change	
NEW Password Repeated	<input type="text"/>		
		CANCEL	Help

## 17.3 Maintenance

The Maintenance Screen is only available to Supervisor users and allows the user to define and change User Names, Passwords and Access Levels.

The System Administrator only has other maintenance options available via this screen.

### 17.3.1 Edit Users

The current user must have “Supervisor” access to PM to be able to edit users.

On this screen the currently defined users are shown and their Access Levels and Viewing Restrictions can be changed.

User Name	User Access Level (Required)			
Somewhere	Supervisor	Reset Password	Delete this User	Restrict Views
Somebody	Full Access *	Reset Password	Delete this User	Restrict Views
Demo	Full Access	Reset Password	Delete this User	Restrict Views

Clicking the “Reset Password” button will set the User Password to the same as the User Name. PM will require this to be changed the first time the new user logs in. The red \* indicates a User who needs to set their own password after a Reset.

Clicking the “Delete this User” button will delete the user. PM will not permit the Supervisor Access user to be deleted.

#### 17.3.1.1 Add a User

The current user must have “Supervisor” access to PM to be able to add a new user. The User Name should be entered and then the Access Level selected from the drop-down menu. User Names are unique across all the Parishes using PM – it is suggested to try a combination of the user’s first name and surname (i.e. IanR). If it is rejected, please try a different new user name.

When the “Add as a new User” button is clicked, the User is created with the Password set the same as the User Name. PM will require this to be changed the first time the new user logs in.

**NEW USER**

User Name (Required)

User Access Level (Required)

### 17.3.1.2 Restrict Views

This screen allows the Supervisor to set which categories of personal information are permitted to be viewed by the user being modified. Checking the box allows access to the information in that category. As well as this, entries can be made on the right hand of the screen to prohibit viewing of named screens.

Authorisation to access Safe Ministry and Working With Children Check (WWCC) records and reports can be given to a user by checking the relevant box.

Once changes have been made, click the "Apply" button.

User Name **Demo**

#### Allow this user to view the following information

- Addresses etc.**
- Attendance**
- Pastoral Notes**
- Confidential Forms**

- Permit Access to Safe Ministry and WWCC**

#### Prohibit this user from viewing the following screens

	-	▲
		▼

**APPLY**

17.4 This function has been removed.

## 18 SYSTEM REQUIREMENTS

Web access to PM is via standard Web Browsers.

### Supported web browsers

FileMaker WebDirect is accessible from a web browser. Supported web browsers include:

Desktop browsers	Mobile browsers
Safari 12.x minimum	Mobile Safari on iOS 12.x minimum
Chrome 73 minimum	Chrome 73 minimum on Android 7.x minimum
Internet Explorer 11.x	
Microsoft Edge 44	

FileMaker Clients should use at least version 16 of FileMaker Pro.

## 19 INSTALLATION

Access to PM is supplied as a download that includes a “Read Me” file with installation instructions.

The System Administrator can import data from previous database or spreadsheet systems. Contact: [support@parish-software.net](mailto:support@parish-software.net)

## 20 ADMINISTRATOR and SUPERVISOR USERS

20.1 **Administrator User** - Removed as PM is now a shared on-line system.

### 20.1 Supervisor User

There is a Supervisor user for each “Account” (Parish or Centre) defined. The User Name of the Supervisor user is the same as the (Parish or Centre) name.

Supervisor users have PM Full Access Level and are able to perform the “Maintenance” functions of “Parish Setup” (defining new users, changing their access levels and viewing restrictions, etc.) (see 17.3). Supervisor users see all person entries and are permitted to hide and unhide individual person data from being seen or modified by other users. Supervisor users can only access information within their own Parish or Centre.

Initial log in for the Supervisor: Both the User Name / Account and the Password are the same as the Parish or Centre name. The password is required to be changed the first time it is used.