Church Information System

User's Manual

Designed and By Computing Technologies
8/31/06

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Members vs. Prospects vs. Child of Member

CIS is setup so that a Church and group of users can be up and going as quick as possible with as little headache as possible.

In CIS, Members, Child of Members, and Prospects are all entered thru the same screen, this keeps the user from having to learn multiple operations to enter each. Member, Child of Member, or Prospect is specified on the "Contact Info" tab of the "Member/Prospect Entry/Edit" screen.

Each *Name* in CIS must be specified as Member, Child of Member, or Prospect. Each also must have specified an "Active/InActive" Status on the "Church Info" tab and an "Active/InActive" Status on the "Prospect Info" tab.

This means, that you can have a "Member" that is "Active" in Church and "InActive" as a "Prospect". But you can also have a "Member" that is "InActive" in Church, but "Active" as a "Prospect". And you could also have a "Prospect" that is "Active" in Church and "Active" as "Prospect". And you could…well, I think you get the point.

Outreach Phase

CIS was developed primarily to handle outreach, but was expanded to include many other functions. CIS allows any "name", whether it be a member or prospect in the system, to be in the outreach program. Anyone in the system that has a status of "Active" on the "Prospect Info" tab of "Member/Prospect Entry/Edit" is considered to be in the outreach program.

CIS can do a lot of the work for your outreach program for you. The outreach phases must be setup in the "Outreach Phase Entry" screen. In this screen, you get each phase a name (i.e. Phase 1, Phase 2, etc), a phase action (i.e. GROW Visit, Sunday School Letter, Pastor Visit, etc) and a number of weeks until the next phase begins.

So, each prospect can have a "Next Action" and "Next Action Date" assigned to them. Once that action happens, they will be automatically moved to the next outreach phase. The system does allow you to change this manually or take them out of the outreach phase completely.

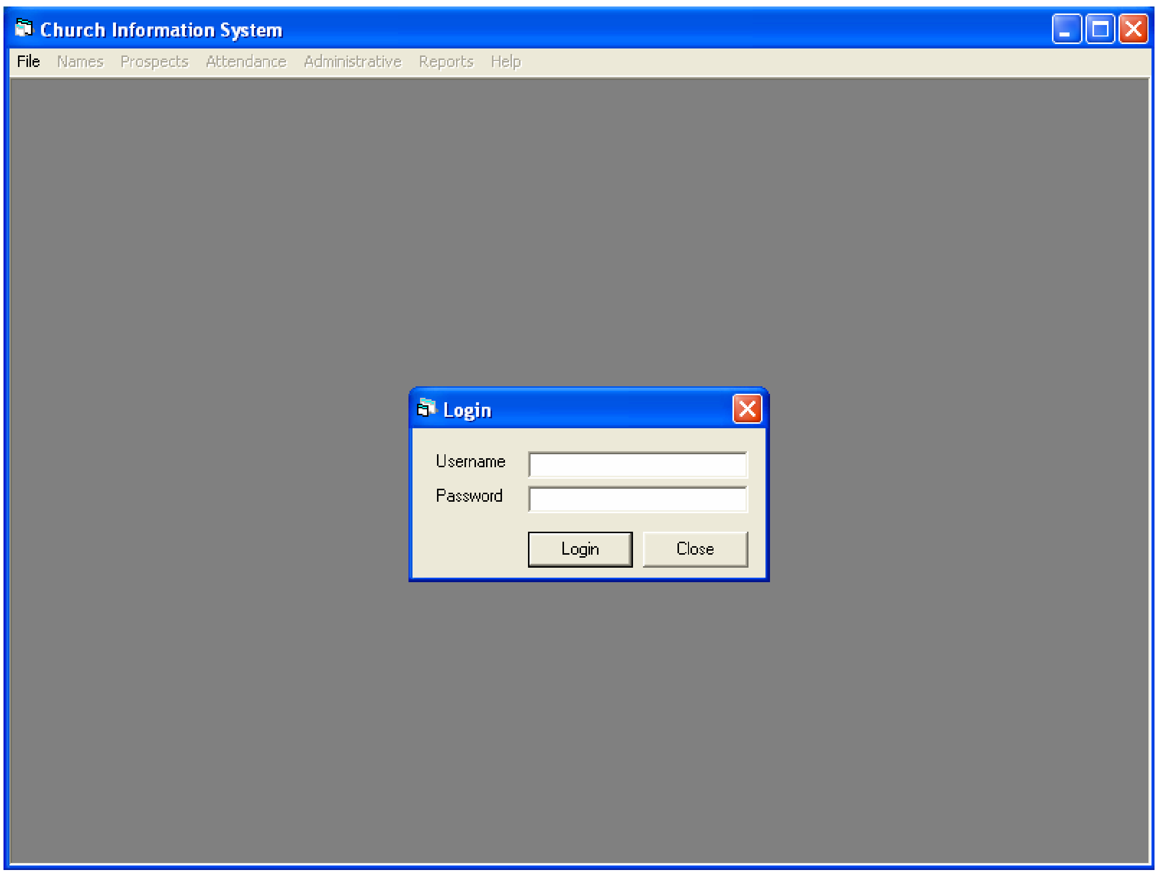
By having each prospect assigned a "Next Action" and "Next Action Date", it is very easy to query a list of prospects to visit, call, write, etc for a certain night, week, month etc thru the Prospect Navigator.

Family Connection

CIS handles family connections in a clean and easy way, once you understand it. CIS assumes that each name entered in the system is either head of household or their head of household is in the system. Now, I know you are probably saying, but I have some youth or children that are going be in the system as a prospect and they are not head of household, we assume that their parent or guardian should also be prospect, and therefore be in the CIS as well.

The system allows you to map the Head of Household to each member of that family. For example, I am in the system as Head of Household, and Kim, my wife, is linked as my wife, and my son and daughter is linked as son and daughter. When this is setup correctly, I can select my name from the list on Member/Prospect Entry and it will show my family members. When I select one of them in Member/Prospect Entry it will show me as Head of Household. This makes it easy to traverse thru a family in CIS.

User Setup



The "Login Screen" is the first thing you will see when you run Church Information System (CIS). Each user of the software must have a Username and Password. The administrator account is Username: Admin and Password: Admin. It is recommended that you change the Administrator password.

CIS requires that each user be assigned privileges. Privileges are used to specify what a user can do in the software, such as, add members or view reports. See Figure 2 for a list and explanation of each Privilege. The administrator account has permission to do anything in the software.

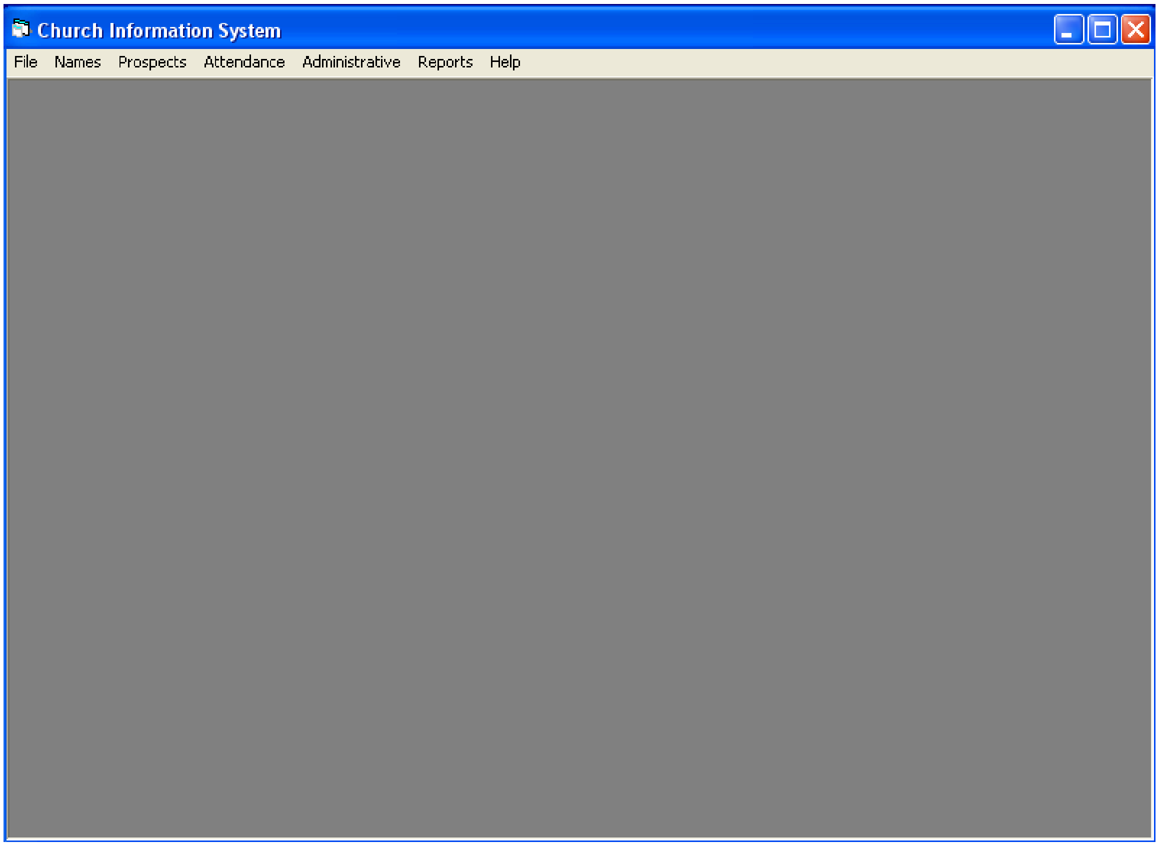
Permission Name	Description
Attendance Entry/Edit	Allows the User to add and edit attendance data
Care Group Entry/Edit	Allows the User to add and edit Care Groups
Church Info	Allows the User to change the Church Name, Address, Phone, etc.
Church Responsibility Entry/Edit	Allows the User to add and edit Church Responsibilities
Defined Values	Allows the User to edit "Defined Values" for the system
Discipleship Training Class Entry/Edit	Allows the User to add and edit Discipleship Training Classes
Mailing Labels Report	Allows the User to view and print Mailing Labels
Member Navigator Report	Allows the User to view and print reports from the Member Navigator
Member Entry/Edit	Allows the User to add and edit Members, Child of Members, and Prospects
Member Information Update Report	Allows the User to view and print a Member Information Update Report
Member View	Allows the User to only view and not add or edit Members, Child of Members, and Prospects
Outreach Phase Entry/Edit	Allows the User to add and edit the Outreach Phases and the order and span of each
Prospect Contact Entry/Edit	Allows the User to add and edit Prospect Contacts that are made
Prospect Navigator Report	Allows the User to view and print reports from the Prospect Navigator
Prospect Visitation Sheet Report	Allows the User to view and print the Prospect Visitation Sheet
Sunday School Class Entry/Edit	Allows the User to add and edit Sunday School Classes
Sunday School Prospect Listing	Allows the User to view and print the Sunday School Prospect Listing Report
Sunday School Roll Report	Allows the User to view and print the Sunday School Roll Report
User Permissions	Allows the User to setup permissions for all users.
Wednesday Night Class Entry/Edit	Allows the User to add and edit Wednesday Night Classes

Let's Get Started!

Now that you have a basic understanding of how the software is laid out, let's get started entering some data. The following is a list of steps I recommend following to begin using the system. Many of these steps will tell you to do something, but not explain how to do it in detail. That is explained later in this manual:

1. I know most people will ignore this step, but it will save you much, much headache down the road if you will READ THIS ENTIRE DOCUMENT BEFORE EVER LOGGING INTO THE SOFTWARE. For those of you who are computer savvy, I know you are going to ignore this step, you probably didn't even make it this for, but at least I can say "I told you so!"
2. Log in as the Administrator account and add each person to the system that will being doing initial data entry. See Member/Prospect Entry/Edit.
3. Create a User Name and Password for each and give them the appropriate privileges. See User Entry.
4. Enter all the Sunday School Classes. See Sunday School Class Entry.
5. Enter all the Discipleship Training Classes. See Discipleship Training Class Entry.
6. Enter all the Wednesday Night Classes. See Wednesday Night Class Entry.
7. Enter all the Care Groups. See Care Group Entry.
8. Enter all the Church Responsibilities. See Church Responsibility Entry.
9. Enter or edit the Defined Values. See Defined Values.
10. Setup the Outreach phases. See Outreach Phase Entry.
11. Enter all the Deacons and assign them the responsibility of "Deacon." This will allow you to select a Deacon for members that you will be entering in the next step. See Member/Prospect Entry Edit.
12. Enter all members and children of the church. As you enter them, I recommend keying all information possible into CIS (i.e. Sunday School Class, Discipleship Training Class, Wednesday Night Class, Deacon, Care Group, Family Relations, etc.) See Member/Prospect Entry Edit.
13. Print out the "Member Info Update Report" for all Members and children and distribute those to be check and updated by each person. Once you get them back, update them in CIS. See Member Info Update Report.
14. Enter all prospects into the system. See Member/Prospect Entry Edit.
15. Now you are ready to go.

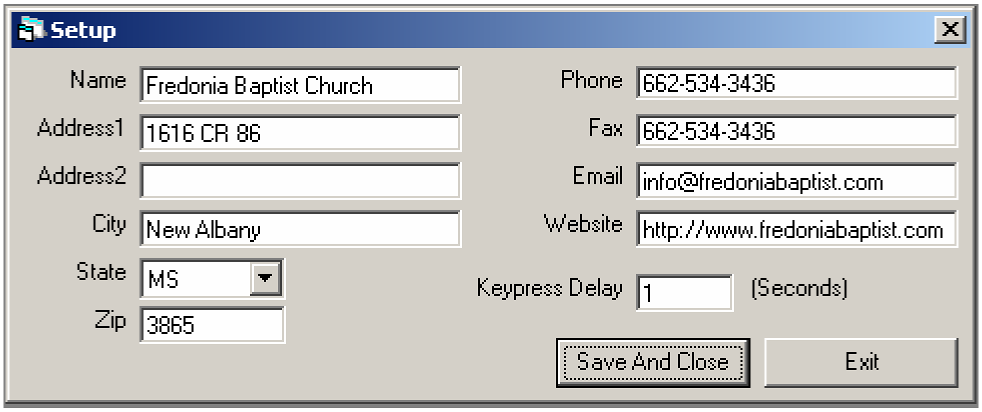
Main Menu



Menu Bar
There are seven Categories on the Menu Bar:

- **File –** Allows you to change Church contact information, logoff, and exit the software.
- **Names** – Allows you to enter and edit members, prospects, and child of members. Also allows you to access the Member Navigator.
- **Prospect** – Access Prospect Navigator and Prospect Contact Entry/Edit.
- **Attendance** – Access the Attendance Navigator.
- **Administrative** – Add/Edit Sunday School Classes, Discipleship Training Classes, Wednesday Night Classes, Care Groups, Outreach Phases, Church Responsibilities, Defined Values and Security.
- **Reports** – View reports for members, prospects, etc.
- **Help** – View current version of the software

Church Setup



Item: File → Setup

Name
Church Name

Address1
1st Line of Address

Address2
2nd Line of Address

City
Church City

State
Church State

Zip
Church Zip Code

Phone
Church Phone

Fax
Church Fax Number

Email
Church Email Address

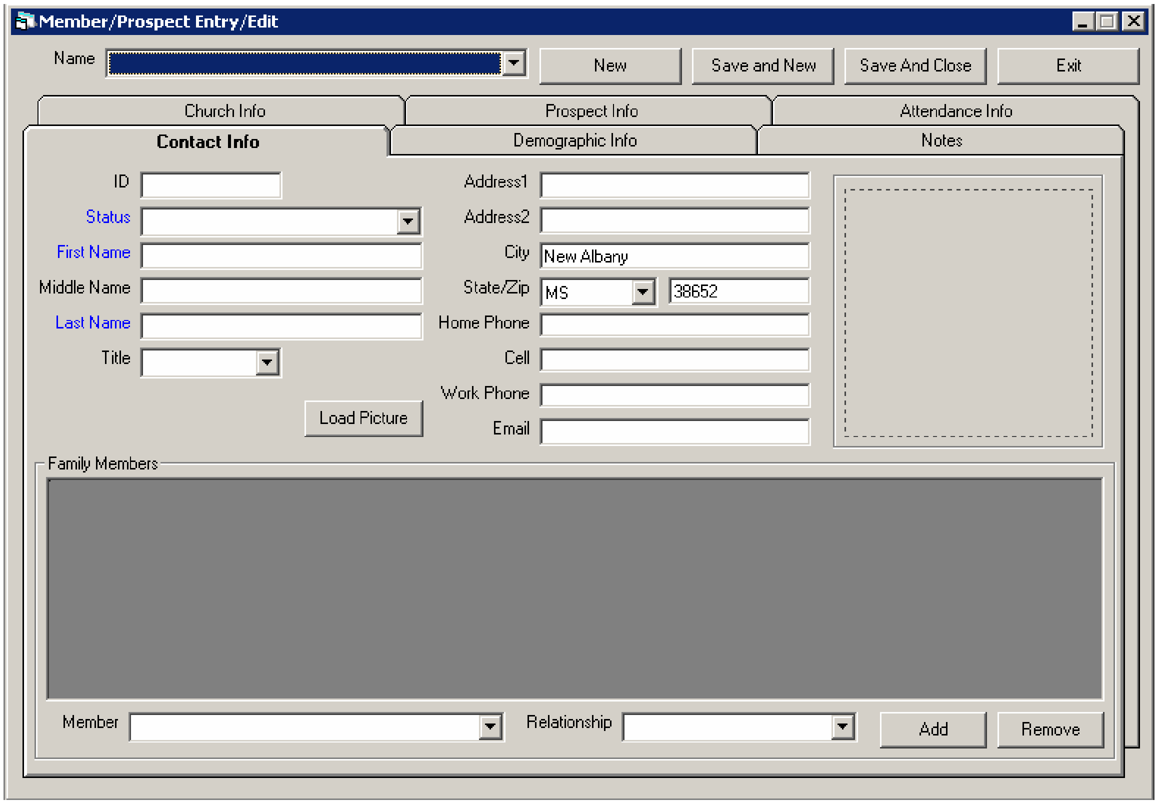
Website
Church Website

Keypress Delay
The number of seconds to wait before resetting a text string that is entered into a drop down list.

Save & Close Button
Click the Save & Close button to save the church information and close the screen.

Exit Button
Click the Exit button to close the screen without saving.

Member/Prospect Entry/Edit



Item: Names → Member/Prospect Entry/Edit

The "Member/Prospect Entry/Edit" screen is where you will enter all names into the system. This includes Members, Child of Member, Prospects, etc. All fields in blue are required before you can save.

Name Drop Down Box
This Drop Down box allows you to select a name that is in the system.

Contact Info Tab
This tab is where you will select the Status of the member (i.e. Member, Prospect, etc.). This screen will also allow you to enter the name, address, phone number(s), picture, etc. This screen also allows you to view all family members assigned to a Head of Household, or if the selected name is not the Head of Household, it will display the Name that is assigned as the Head of Household.

To add a family member to the selected name, select the family member and relation ship to be added and click the Add Button.

To remove a family member, select the member to be removed from the grid and click Remove. This will not remove the name from the system, but only the relationship.

** Note **

Only Non-Head of Households will show up in the drop down box to be added as family members.

Demographic Info Tab
This tab is where you will enter items such as Place of Work, Occupation, Date of Birth, Head of Household, etc.

Notes Tab
This tab will give you plenty of space to record notes for that particular person. This tab also shows you added the name to the system and when and the last edit to that name.

Church Info Tab
This tab will hold all the church related info for that name. This tab is used primarily for Members and Child of Members. You must select a Church Status (Active or InActive). There are many dates you can record here, as well as, Class Assignments. This tab also allows you to define Church Responsibilities for that person (i.e. Deacon, Sunday School Class Teacher, etc.)

To add a responsibility to the selected name, select the responsibility and begin and end dates and click the Add Button.

To remove a responsibility from the selected name, select the responsibility from the grid and click the Remove Button.

Prospect Info Tab
This tab will hold all the prospect related info for that name. This tab is used primarily for Prospects and InActive Church Members. You must select a Prospect Status (Active, InActive, or Guest). This tab allows you to specify the source, Sunday School Class assigned, and notes. This tab also shows previous contacts that have been recorded for that name and shows you the current Outreach Phase, Next Outreach Action, and Date.

You can double click a contact on the grid to open up in the Prospect Contact Entry/Edit screen.

Attendance Info Tab
This tab will show attendance, daily Bible reading, and studied lesson history for the selected name. Each day highlighted in yellow represents an attendance, daily Bible reading, or studied lesson for the selected name.

Use the "<<" and ">>" Buttons to move month to month.

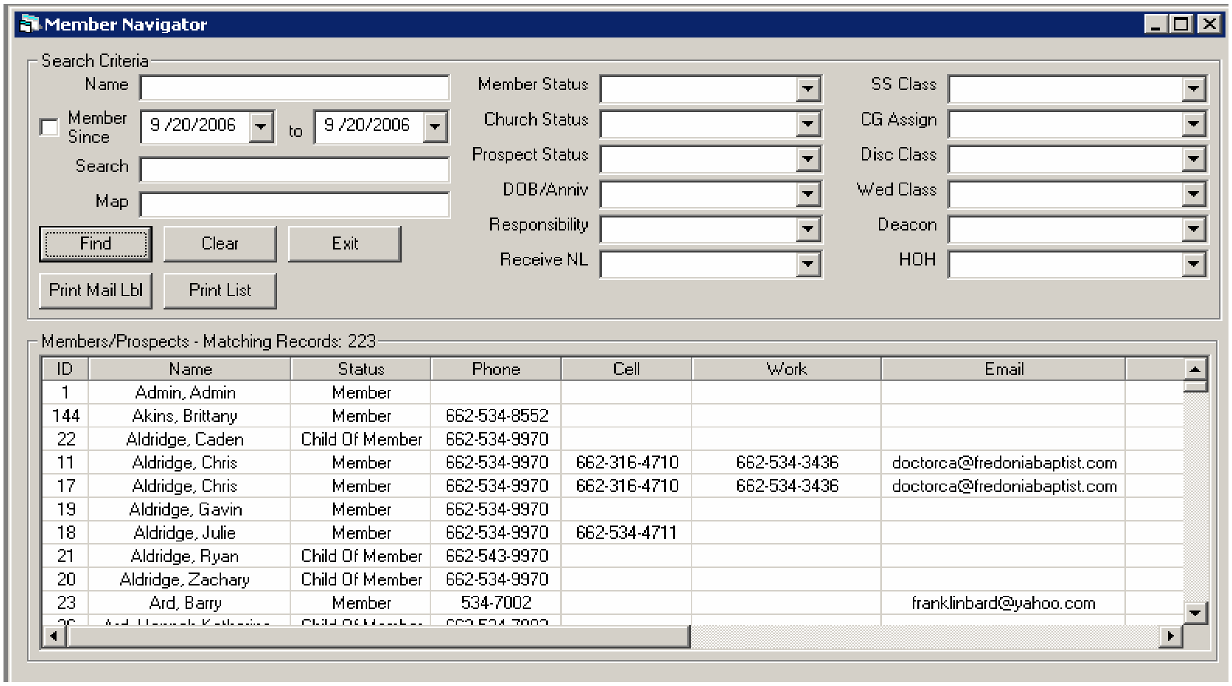
New Button
Click this button to add a new name to the system.

Save and New Button
Click this button to save the current information and add a new name to the system.

Save and Close Button
Click this button to save the current information and close the Member/Prospect Entry/Edit Screen.

Exit Button
Click this button to close the Member/Prospect Entry/Edit Screen without saving any changes.

Member Navigator



Item: Names → Member Navigator

The Member Navigator gives you the ability to search for names based on status, date of birth, Sunday School class, etc.

You can double click a name in the grid to open them in the Member/Prospect Entry/Edit screen.

Search Criteria Section
Filter the names displayed by selecting one or more fields and clicking the Find Button.

Find Button
Searches for all Names matching the specified Search Criteria

Clear Button
Clears the Search Criteria fields.

Exit Button
Closes the Member Navigator screen

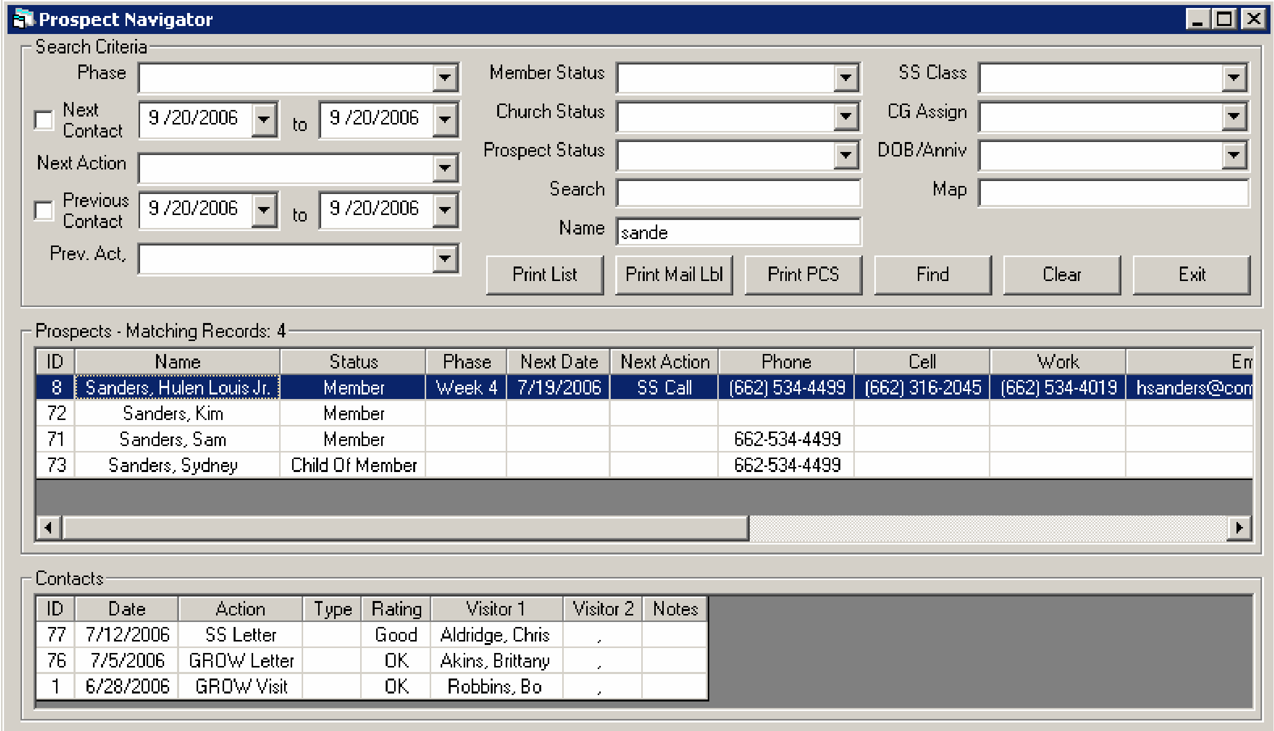
Print Mail Lbl Button
This will print a mailing label for each name displayed in the Member/Prospect Section. The labels will print in the format of Avery 5160 labels 30 per page.

Print List Button
Prints a listing with detail for each name listed in the Member/Prospect Section.

Member/Prospect Section

This section displays all names matching the Search Criteria. You can double click a name in the grid to open them in the Member/Prospect Entry/Edit screen. The title block for the section also displays a count for the number of names matching the Search Criteria.

Prospect Navigator



Item: Prospects → Prospect Navigator

The Prospect Navigator gives you the ability to search for names based on status, next and previous actions, date of birth, Sunday School class, etc.

You can double click a name in the grid to open them in the Member/Prospect Entry/Edit screen.

<u>Search Criteria Section</u>
Filter the names displayed by selecting one or more fields and clicking the Find Button.

<u>Print List Button</u>
Prints a listing with detail for each name listed in the Prospect Section.

<u>Print Mail Lbl Button</u>
This will print a mailing label for each name displayed in the Prospect Section. The labels will print in the format of Avery 5160 labels 30 per page.

<u>Print PCS Button</u>
Prints a "Prospect Contact Sheet" for each name listed in the Prospect Section.

<u>Find Button</u>
Searches for all Names matching the specified Search Criteria

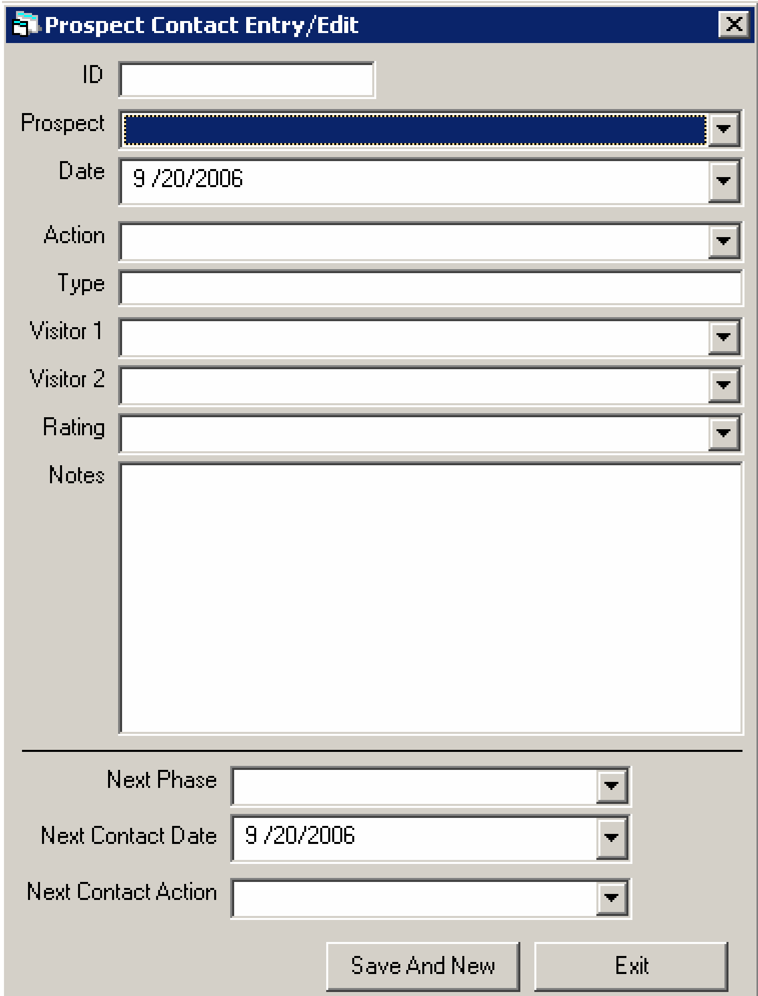
<u>Clear Button</u>
Clears the Search Criteria fields.

Exit Button
Closes the Prospect Navigator screen

Prospect Section
This section displays all names matching the Search Criteria. You can double click a name in the grid to open them in the Member/Prospect Entry/Edit screen. The title block for the section also displays a count for the number of names matching the Search Criteria.

Contacts Section
This section displays a listing of all previous contacts made to the name selected in the Prospect Section Grid. You can double click a contact to open it in the "Prospect Contact Entry/Edit" screen.

Prospect Contact Entry/Edit



Item: Prospects → Prospect Contact Entry/Edit

This screen allows you to record each contact made for a Prospect.

ID
Internal identifier for the contact.

Date
Enter the date of the contact.

Action
Enter the type of contact (Visit, Phone Call, Letter, etc)

Type
Addition field for recording type of visit or letter.

Visitor 1
Enter the name of the first visitor, caller, letter writer, etc.

Visitor 2
Enter the name of the second visitor, caller, letter writer, etc.

Rating
Select a rating (Good, Poor, Not Reached, etc)

Notes
Enter any notes taken from the visit, call, letter, etc.

Next Phase
Select the next phase for the prospect.

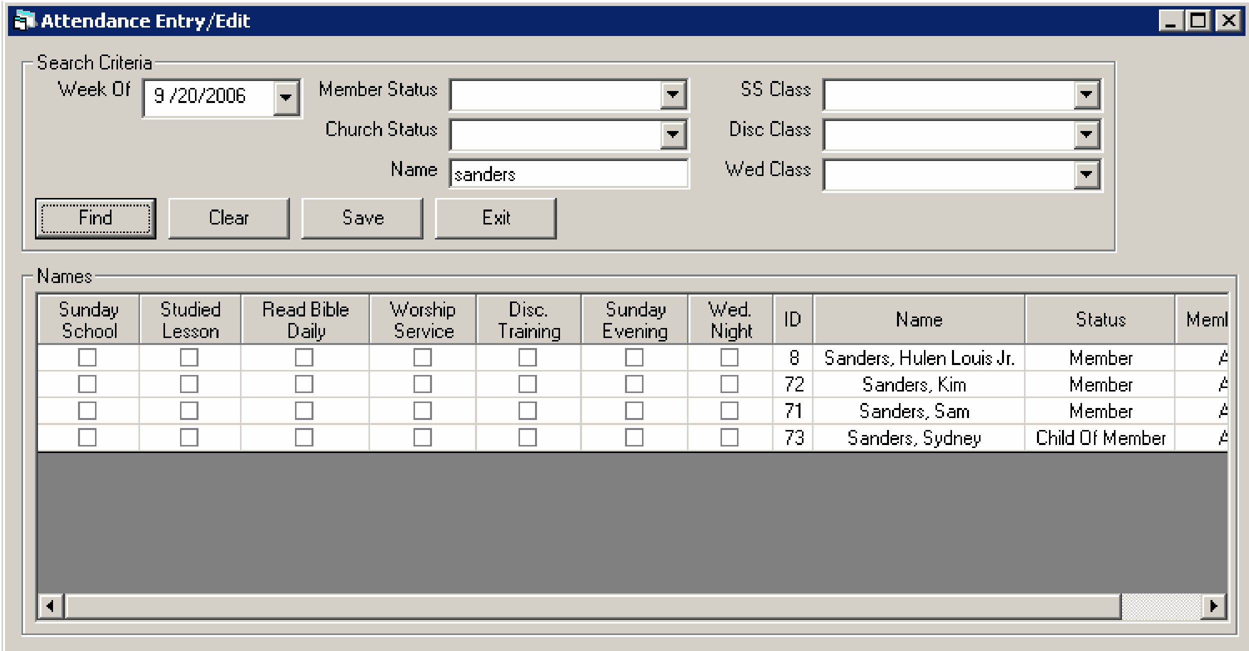
Next Contact Date
Enter the next scheduled contact date for the prospect.

Next Contact Action
Enter the next scheduled contact action for the prospect.

Save and New
Click to save the current contact and add a new.

Exit Button
Click the Exit button to close the screen without saving.

Attendance Entry/Edit



Item: Attendance → Attendance Entry/Edit

The Attendance Entry/Edit screen allows you to record attendance, studied lesson, and daily Bible reading. Start by selecting a "Week Of" and other criteria and clicking the Find button. Then click the check box under each item that needs to be selected. Finish by click the Save button.

Search Criteria Section
Filter the names displayed by selecting one or more fields and clicking the Find Button.

Find Button
Searches for all Names matching the specified Search Criteria

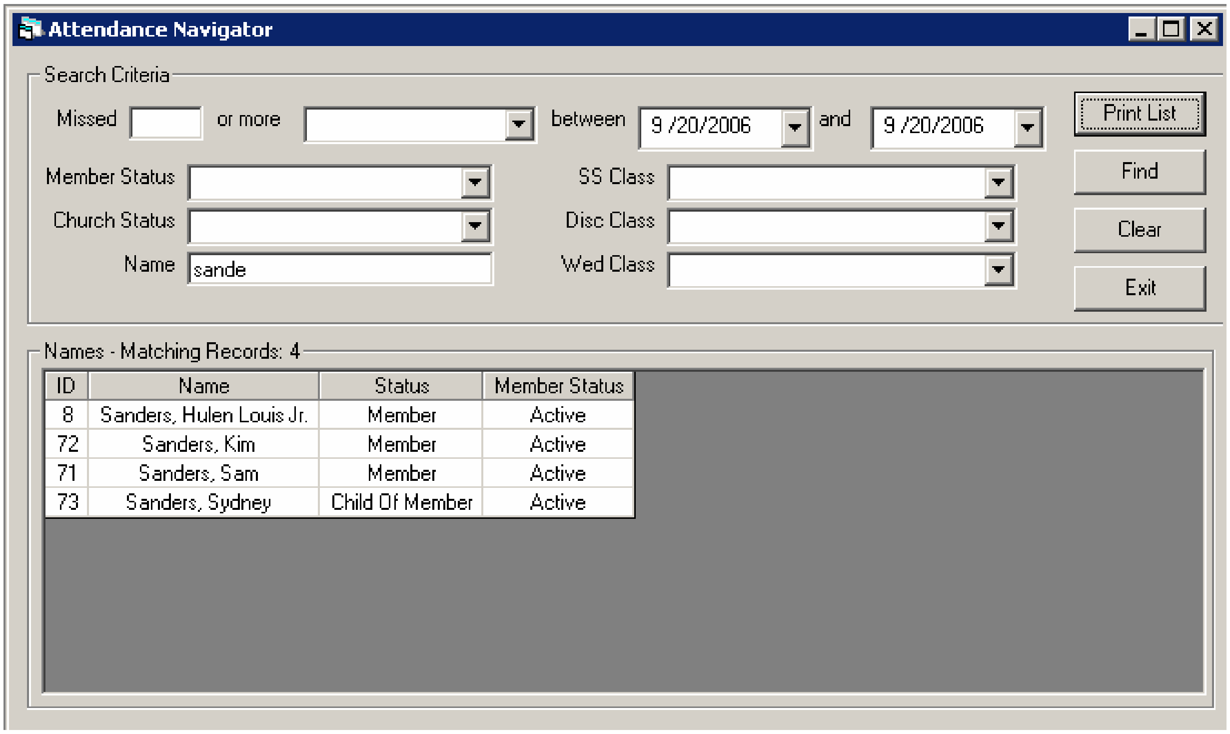
Clear Button
Clears the Search Criteria fields.

Save Button
Click the Save button to record the attendance, studied lesson, and daily Bible reading.

Exit Button
Closes the Attendance Entry/Edit screen

Names Section
Displays each name matching the Search Criteria.

Attendance Navigator



Item: Attendance → Attendance Navigator

The Attendance Navigator gives you the ability to search for names based on attendance, studied lesson, and daily Bible reading.

You can double click a name in the grid to open them in the Member/Prospect Entry/Edit screen.

Search Criteria Section
Filter the names displayed by selecting one or more fields and clicking the Find Button.

Print List Button
Prints a listing with detail for each name listed in the Names Section.

Find Button
Searches for all Names matching the specified Search Criteria

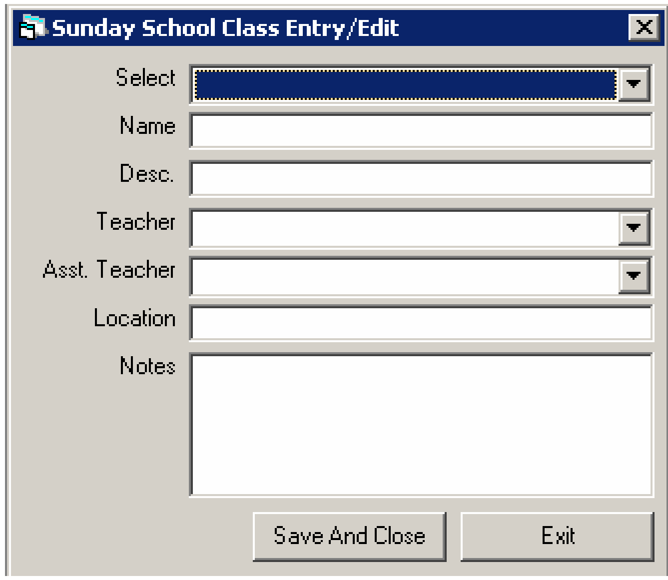
Clear Button
Clears the Search Criteria fields.

Exit Button
Closes the Attendance Navigator screen

Names Section
This section displays all names matching the Search Criteria. You can double click a name in the grid to open them in the Member/Prospect Entry/Edit screen. The title block

for the section also displays a count for the number of names matching the Search Criteria.

Sunday School Class Entry/Edit



Item: Administrative → Class Entry → Sunday School Class Entry

Select
Allows you to select from the list of classes that exist.

Name
Enter the name for the class.

Desc.
Enter a description for the class.

Teacher
Select a teacher for the class.

Asst. Teacher
Select an assistant teacher for the class.

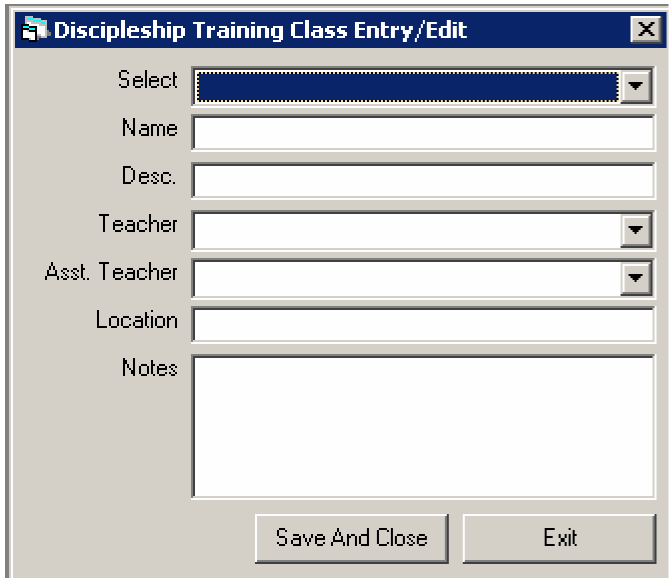
Location
Enter a location for the class.

Notes.
Enter any notes for the class.

Save And Close Button
Click the Save and Close button to save all class information

Exit Button
Click the Exit button to close the screen without saving.

Discipleship Training Class Entry/Edit



Item: Administrative → Class Entry → Discipleship Training Class Entry

Select
Allows you to select from the list of classes that exist.

Name
Enter the name for the class.

Desc.
Enter a description for the class.

Teacher
Select a teacher for the class.

Asst. Teacher
Select an assistant teacher for the class.

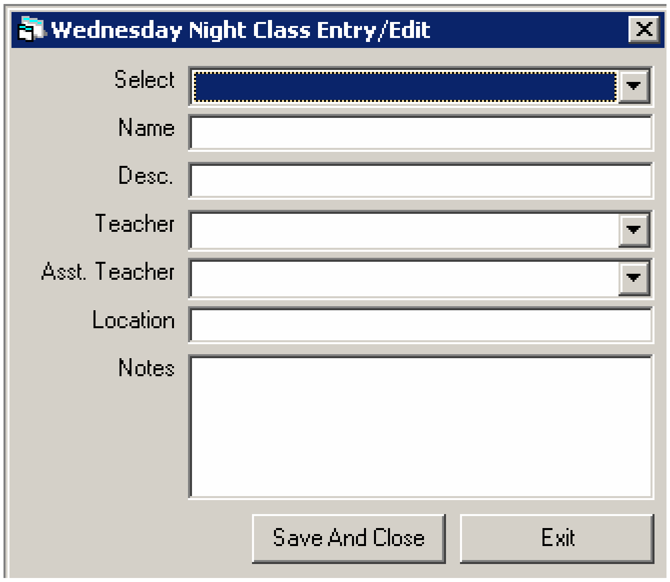
Location
Enter a location for the class.

Notes.
Enter any notes for the class.

Save And Close Button
Click the Save and Close button to save all class information

Exit Button
Click the Exit button to close the screen without saving.

Wednesday Night Class Entry/Edit



Item: Administrative → Class Entry → Wednesday Night Class Entry

Select
Allows you to select from the list of classes that exist.

Name
Enter the name for the class.

Desc.
Enter a description for the class.

Teacher
Select a teacher for the class.

Asst. Teacher
Select an assistant teacher for the class.

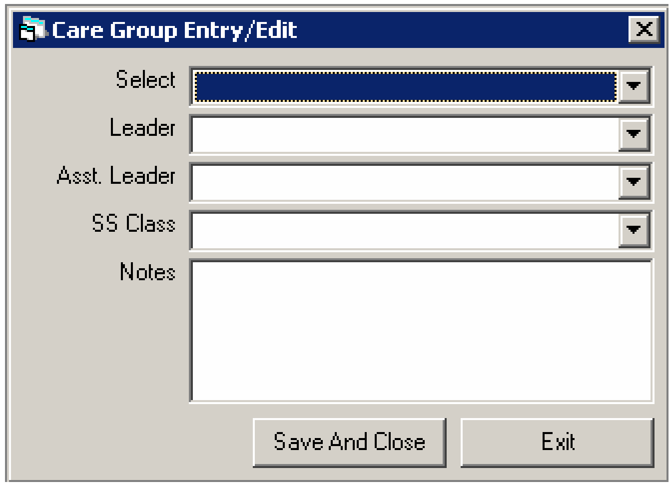
Location
Enter a location for the class.

Notes.
Enter any notes for the class.

Save And Close Button
Click the Save and Close button to save all class information

Exit Button
Click the Exit button to close the screen without saving.

Care Group Entry/Edit



Item: Administrative → Care Group Entry

Select
Allows you to select from the list of groups that exist.

Leader
Select the Leader of the Care Group.

Asst. Leader
Select the Assistant Leader of the Care Group.

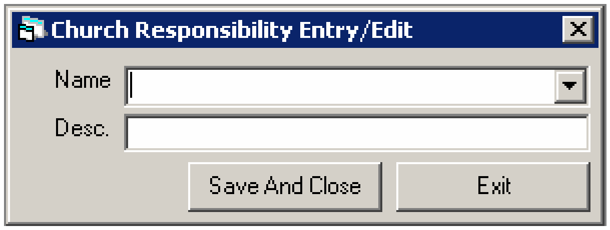
SS Class
Select the Sunday School Class that the Care Group represents

Notes.
Enter any notes for the group.

Save And Close Button
Click the Save and Close button to save all group information

Exit Button
Click the Exit button to close the screen without saving.

Church Responsibility Entry/Edit



Item: Administrative → Church Responsibility Entry

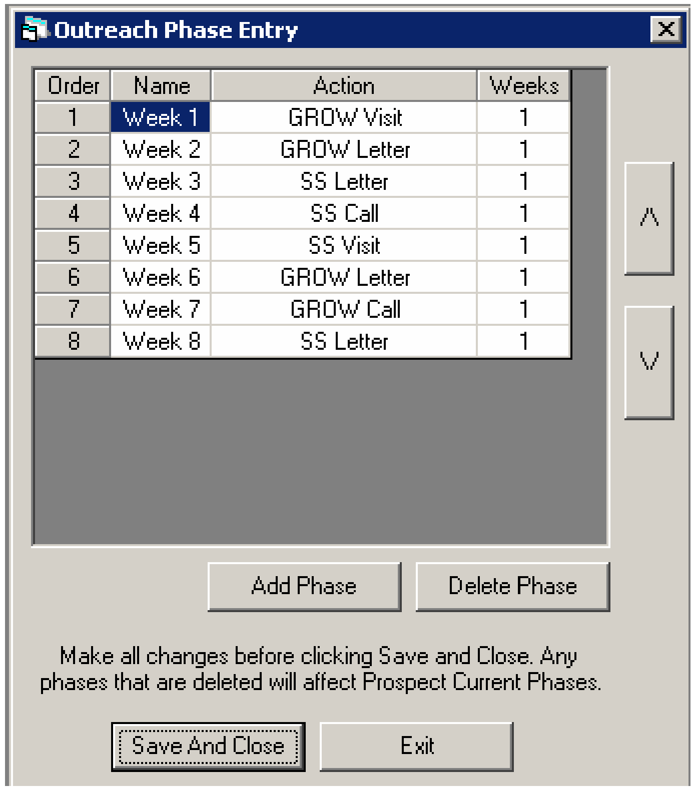
Name
Enter the name of the Church responsibility

Description
Enter a description of the Church responsibility

Save And Close Button
Click the Save and Close button to save all information

Exit Button
Click the Exit button to close the screen without saving.

Outreach Phase Entry



Item: Administrative → Outreach Phase Entry

This screen allows you to define the steps of the outreach phase. You can have any number of phases and each can extend for any amount of weeks.

This information will come into play when entering contacts for a prospect. It will automatically schedule a contact for the next phase on the list in the defined time line.

Order
Order in which the phases will happen.

Name
Name of the phase

Action
Action for the phase

Weeks
Number of weeks before the next action is scheduled.

/\ Button
Moves the selected phase up in the list.

\/ Button
Moves the selected phase down in the list.

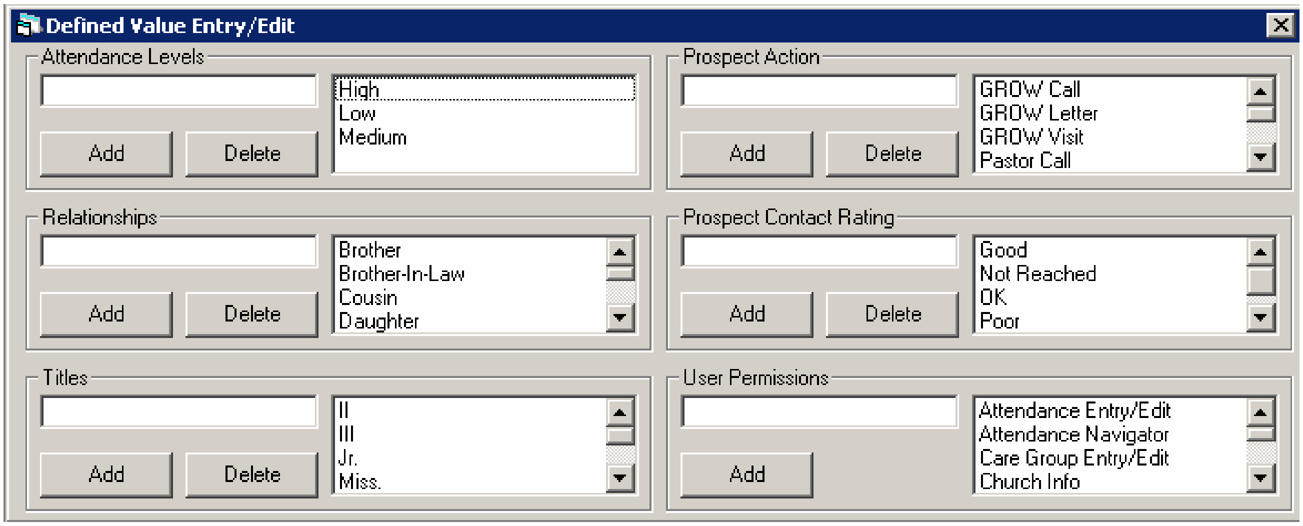
Add Phase Button
Adds another phase to the list of actions.

Delete Phase Button
Deletes the selected phase from the list.

Save and Close Button
Click the Save and Close button to save all outreach phase information.

Exit Button
Click the Exit button to close the screen without saving any changes.

Defined Values Entry/Edit



Item: Administrative → Defined Values

Attendance Levels
Church attendance levels.

Relationships
Family relationships

Titles
Titles for names in the system

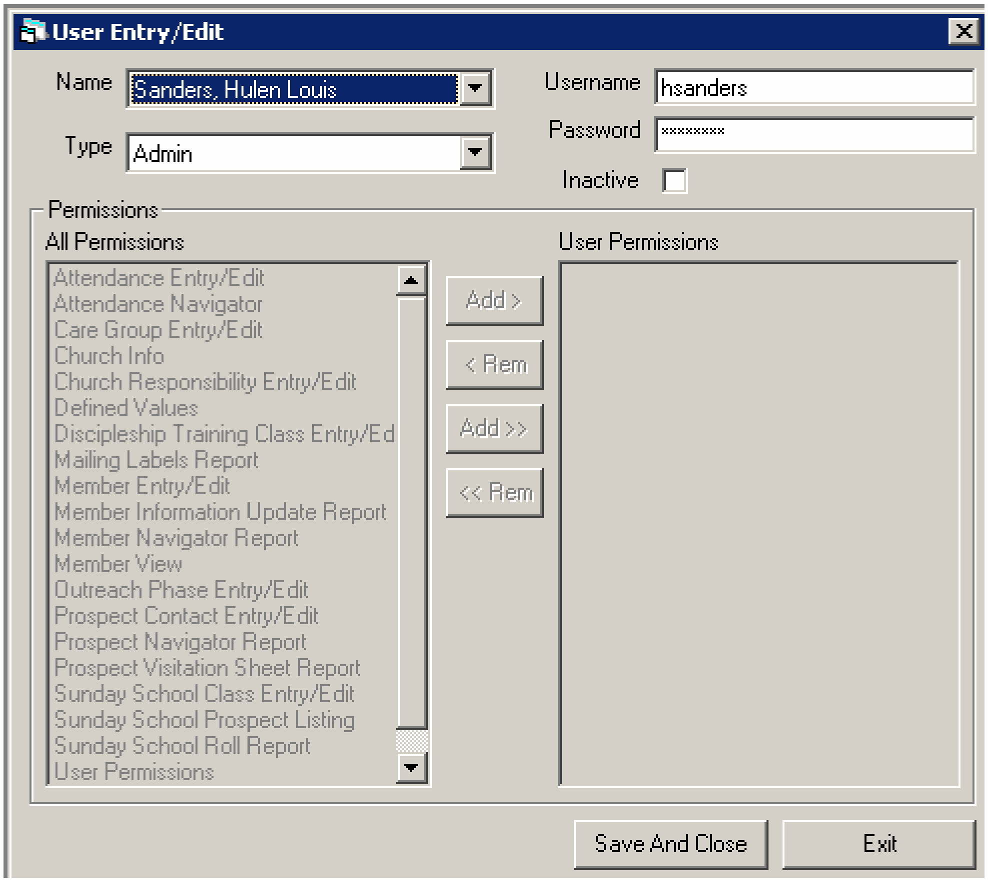
Prospect Action
Outreach actions.

Prospect Contact Rating
Contact ratings.

Cut-Style
Select the Cut-Style for the Component

User Permissions
Permissions allowed in the system. **These should not be changed.**

User Entry/Edit



Item: Administrative → Security → User Entry

This screen allows you to define permissions for each user. To give someone permission to use the system, you must select them from the Name List, select a type (Admin or User), assign a username, and password.

An Admin has the ability to perform all functions in the software. A User has the ability to perform only the assigned privileges.

To add permissions to a user, select the name from the drop down and highlight the desired permission and click the "Add >" button. To remove, select the user permission and click the "< Rem" button.

Save and Close Button
Click the Save and Close button to save the user information and close the screen.

Exit Button
Click the Exit button to close the screen without saving.

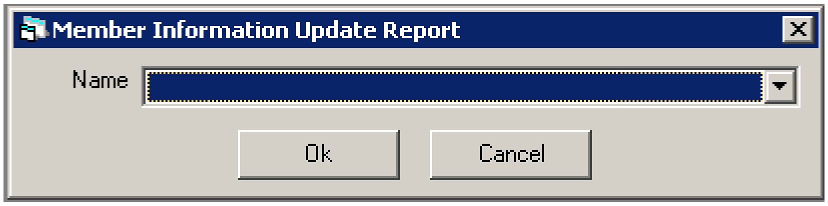
About Screen

Item: Help → About

OK Button
Closes the About Screen

System Info Button
Displays information pertaining to your current system

Member Information Update Report

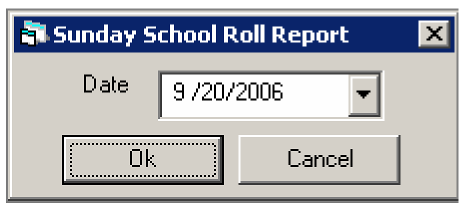


Item: Reports → Member Reports → Member Info Update Report

Options
Select the name for the report to be printed. You can also select "All Members and Child of Members" or "Add Head of Household".

Description
Shows all recorded information for that person with the ability for them to write in updated information to be keyed back in the system.

Sunday School Roll Report

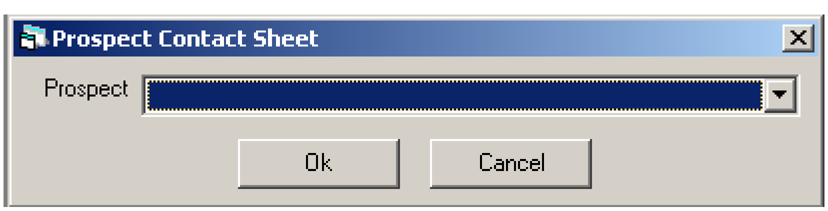


Item: Reports → Member Reports → Sunday School Roll

Options
Select the Date for the Roll.

Description
Displays a report for each Sunday School class for the teacher to mark each member present, daily Bible reading, and studied lesson. This report can be turned back in to be recorded in the system.

Prospect Contact Sheet

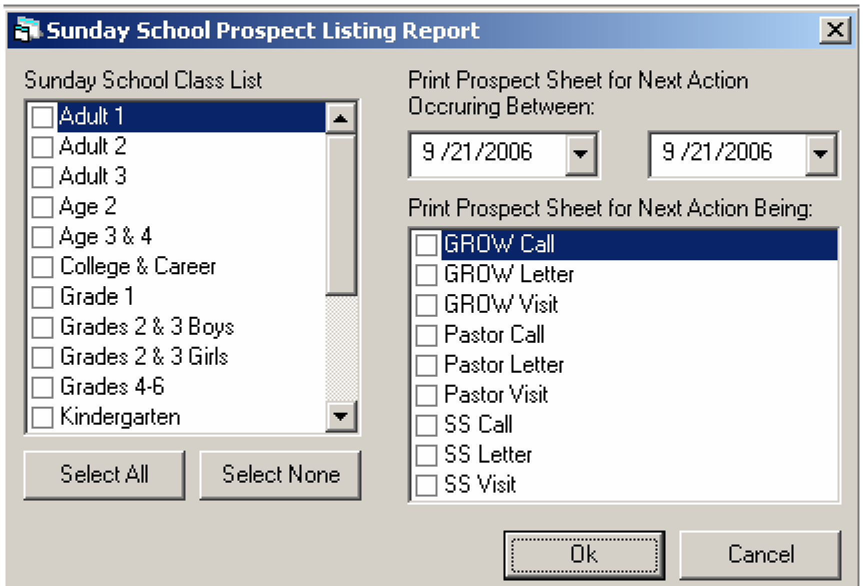


Item: Reports → Prospects Reports → Prospect Contact Sheet

Options
Select the prospect for the report.

Description
Displays contact information, notes, previous contacts, etc. for the prospect. This report will be used to record any notes for a scheduled contact.

Sunday School Prospect Listing Report



Item: Reports → Prospects Reports → Sunday School Prospect Listing

Options
Select the Sunday School classes and the dates and actions for which you want a Prospect Contact Sheet to be printed.

Description
This report lists all prospects by Sunday School class. This allows the Sunday School classes to be familiar with their prospects. It will also print a Prospect Contact Sheet for each person scheduled for a contact in the criteria you specify.

Sunday School Class Listing Report

Item: Reports → Administrative → Sunday School Class Listing

Description
Lists all Sunday School classes and their information.

Discipleship Training Class Listing Report

Item: Reports → Administrative → Discipleship Training Class Listing

Description
Lists all Discipleship Training classes and their information.

Wednesday Night Class Listing Report

Item: Reports → Administrative → Wednesday Night Class Listing

Description
Lists all Wednesday Night classes and their information.

Care Group Listing Report

Item: Reports → Administrative → Care Group Listing

Description
Lists all Care Groups and their information.

Church Responsibility Listing Report

Item: Reports → Administrative → Church Responsibility Listing

Description
Lists all Church Responsibilities and the names that are assigned to them.