The Church Executive™ — Installation and Configuration (for Access users)

Introduction

This chapter discusses installing *The Church Executive*™ a stand-alone computer or on a network. It also looks at configuring the program by customizing various settings within the program.

The Church Executive™ consists of two parts:

- *front end:* the 'program'[1] portion that contains the forms, reports, queries, program codes, etc. that makes the program work. The name of this file is **ce.mde**.
- *back end database:* the 'data' portion that contains the tables and the data that your office generates. This one file contains dozens of tables used to store your data. The tables within this database are *linked* to the front end. The name of this file is **ce_be.mdb**.

The program has been split into these two files so that program updates can be distributed without affecting any of your data.

Index

[1] "program" is not quite accurate. This is really a customized Microsoft Access *database*. The forms, reports, queries, etc. is certainly developed as a "program", but Access is the actual program that allows us to view this *database*. However, we typically refer to this customized database as a *program*.

Installation

Stand-alone	Network
It is recommended that *both* the front end (ce.mde) and the back end (ce_be.mdb) be installed in the same folder, called simply *ce*. â Create a folder on your hard drive (likely **C:**) and call it **ce** ã Copy the program files into this folder. The files will consist of: < ce.mde < ce_be.mdb < ce.ico < cemain.bmp < any logo/images to be used in the program ä Create a shortcut on your desktop to run the program. Change the icon to be ce.ico. å Run and configure the program as noted on pages 3 and 5.	The back end (ce_be.mdb) will be installed on a network server; the front end (ce.mde) will be installed on *each* workstation. â create a folder on your network server (likely **F:**) and call it **ce** ã Copy the program files into this folder. The files will consist of: < ce.mde < ce_be.mdb < ce.ico < cemain.bmp < any logo/images to be used in the program On *each workstation:* ä Create a folder on your hard drive (likely **C:**) and call it **ce** å Copy the program file, icon, and any images from the network folder to the local folder. [Although you could point the program to find these files from the network, this will cause a slight delay in loading and running the program due to the required network access.] The files will consist of: < ce.mde < ce.ico < cemain.bmp < any logo/images to be used in the program æ Create a shortcut on your desktop to run the program. Change the icon to be ce.ico. ç Run and configure the program as noted on pages 3 and 5.

Configuring Access

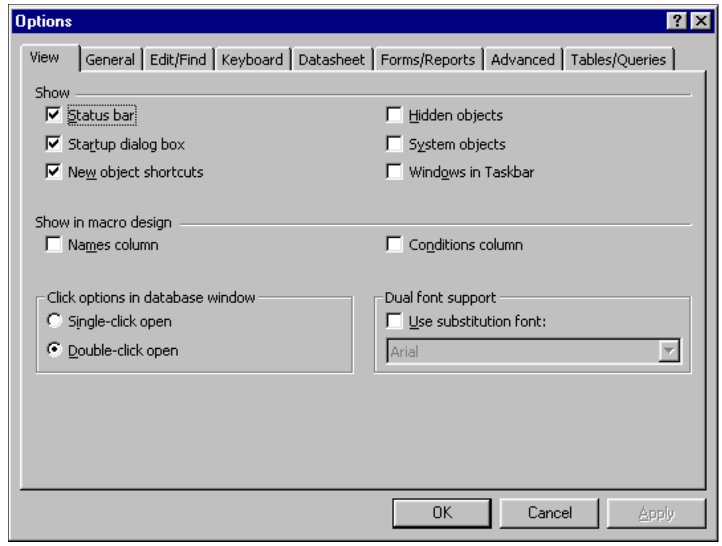
This section should be done only once on each computer, and is necessary if you are using Microsoft Access 2000, 2002, or 2003..

If you are using Microsoft Access 2000, 2002, or 2003...

Using the **Tools** | **Options** feature, we can configure certain features of Access.

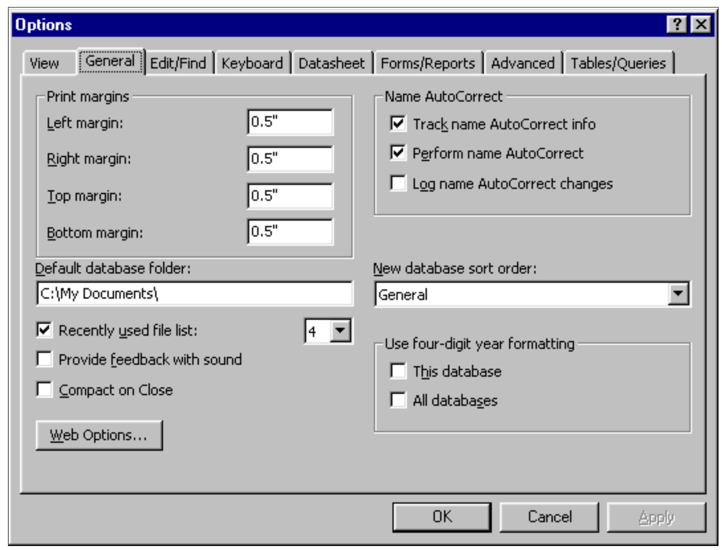
View tab

< there is no need to have the **Windows in Taskbar** checked; instead use the **Window** pull-down menu to switch to different modules of the program.

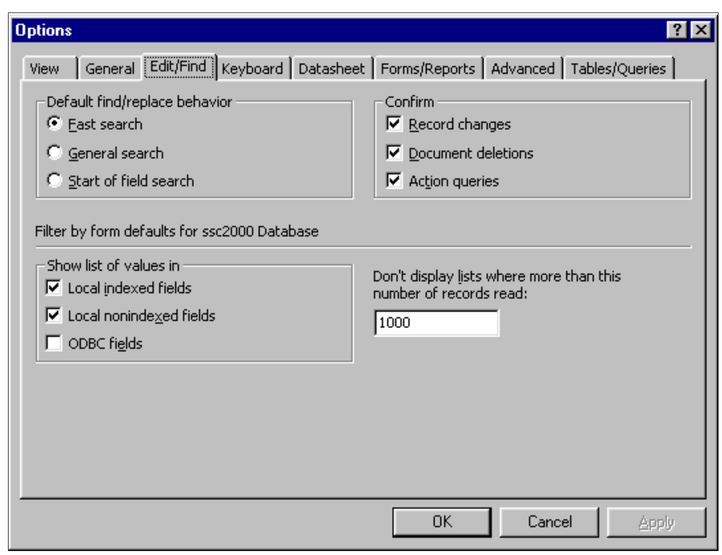


General tab

< change the print margins to 0.5" for all four sides.

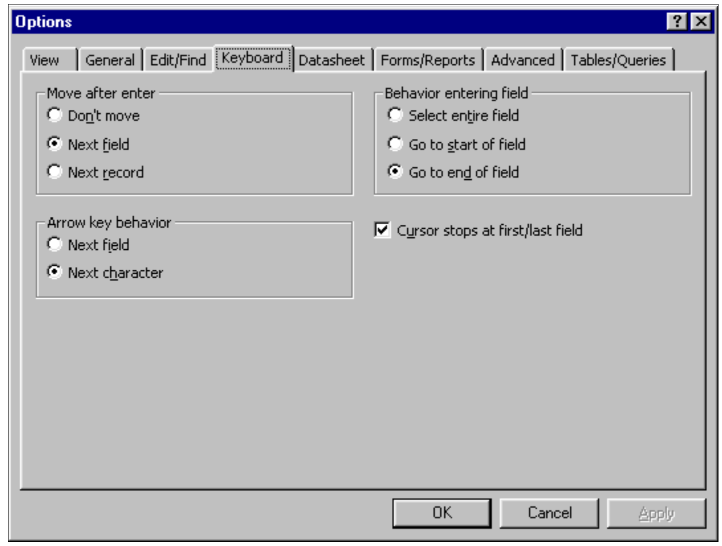


Edit/Find tab



Keyboard tab

< change the Behavior entering field selection to **Go to end of field**.



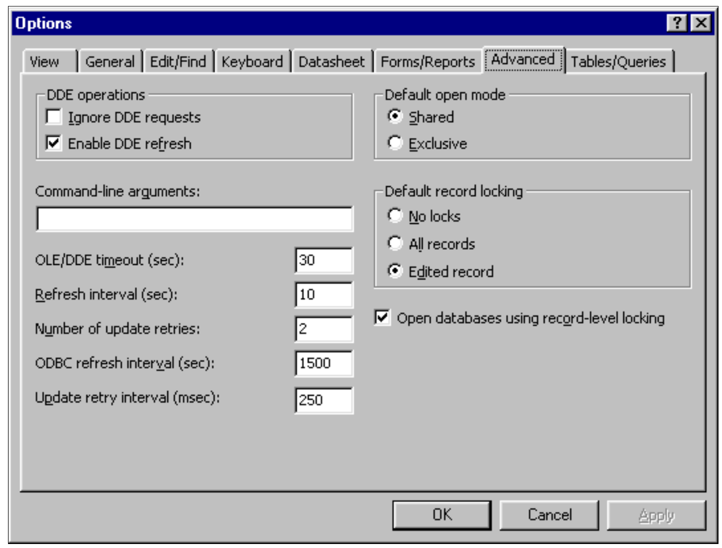
Advanced tab

< the Default open mode must be **Shared**.

< the Default record locking must be **Edited record**.

< the **Open databases using record-level locking** must be checked.

< change the **Refresh interval (sec):** to 10.



Configuring The Church Executive™

This section should be done only once on each computer.

Configuring The Church Executive™ includes setting the following options:

- create user(s) and set security levels
- system-wide defaults

The *first* time you run the program, use a user id of **Demo** with a password of **Demo**. This will allow you access to the Users module where you can create and define users.

Users

Select the **Users** button from the Main Switchboard. This button is only visible if your security level for this feature is a level of 5. The pre-configured user of **Demo** has this security level.

If you delete user **Demo** or only have users whose security level for this feature is not a 5, you will not be able to gain access to this module!

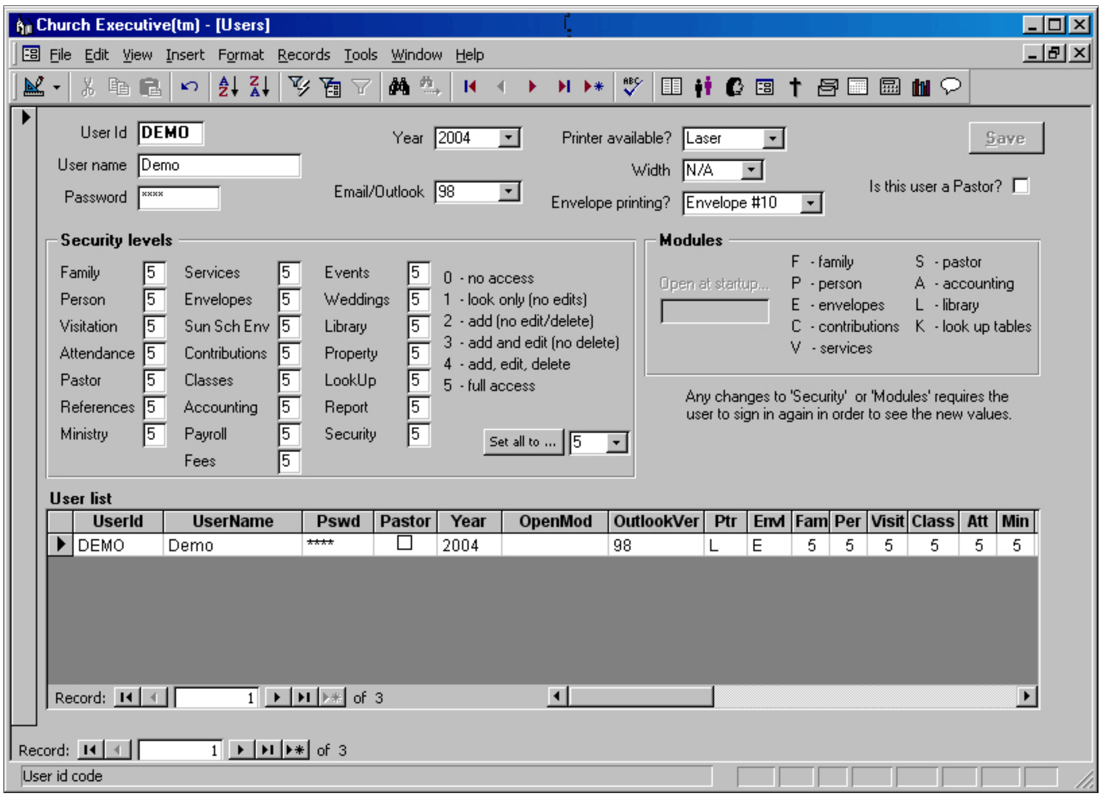


Figure 7 Users

The top half of the screen is used to add new users and edit existing users.

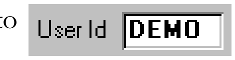
The datasheet listing in the bottom portion of the form provides a quick list of which users exist for this program — the information in this part of the form cannot be modified.

User Fields

Here are the fields used by each user.

User id

Up to 5 characters, unique to each user. It is this id that the user will require to enter into the program.



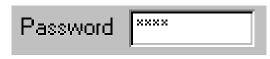
If this is a Pastor, **use the same characters as assigned in the Staff module** — if so, you are limited to **3** characters. This will aid in the use of the Pastor Records module.

User name

What is the full name of this user.

Password

Up to 10 characters. Asterisks will appear as you enter the password. The user requires this password, along with their user id, to enter into the program.



Year

This drop-down list identifies the default year *this user* is using for contribution and ministry purposes. It can be different from other users, depending on the needs of each user.

Email/Outlook

A drop-down list that identifies the version of Microsoft Outlook that this specific user has installed on *their* computer.

Printer available?

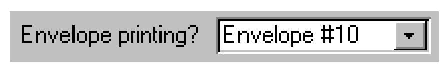
What is the default printer setting (in Microsoft Windows) for this user?

Width

What is the width of the printer used by this user?

Envelope printing?

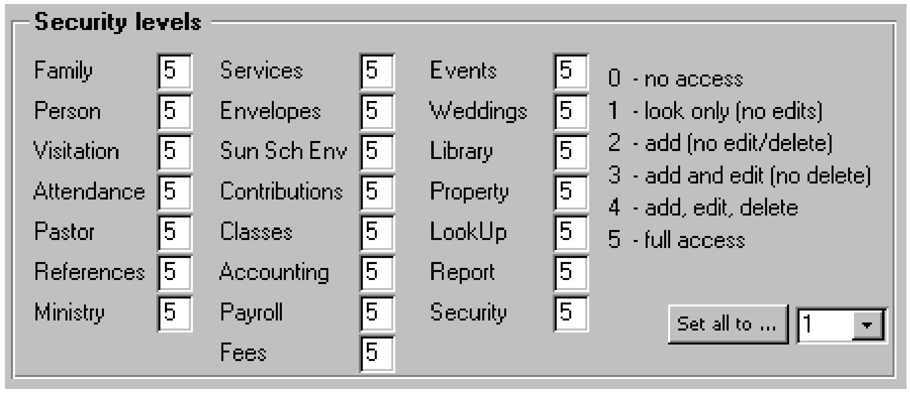
If this user prints envelopes, how are they positioned in the printer?



Is this user a Pastor?

If this user is a Pastor, indicate it by checking this field. As noted above in the User id, the Pastor's user id should be no more than 3 characters and should match that recorded in the Staff module.

Security levels



There are six levels of security that can be assigned to *each* module for *each* user:

Level	Ability
0	access is denied to the specific module
1	can only look at data; no editing is allowed
2	can look and add new data; cannot edit
3	can look, add new data, and edit existing information
4	all of the above, and delete
5	full access within the specific module

The security level for “**Security**” must be 5 in order to have access to the Users module.

System-wide defaults

There are various system-wide defaults that need to be configured. Although most of these will be set only once, others will be changed periodically.

From the Main Switchboard, choose the **Look-up Tables** button. This is the part of the program where the various values displayed in drop-down lists are maintained (that is, *look-up tables*).

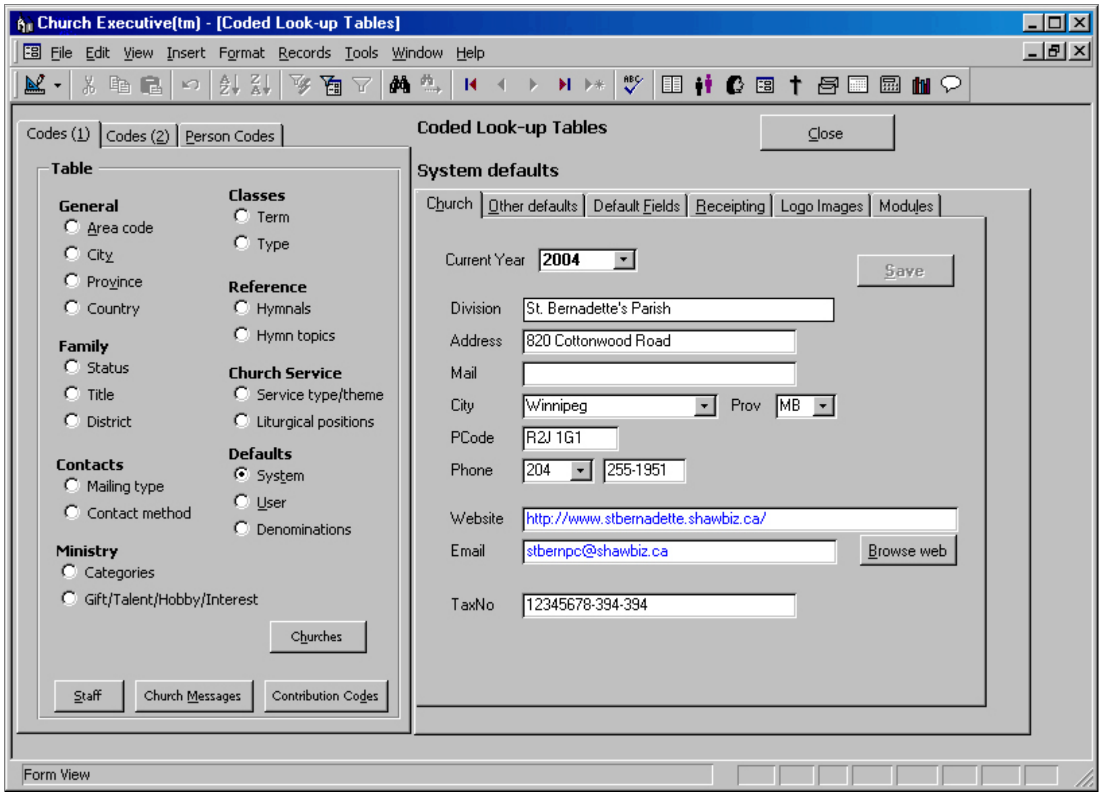
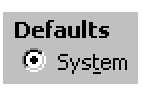


Figure 19 Look-up Table form

You can browse the various look-up tables by clicking on the appropriate radio button from the Table list on the left side of the form. All of these tables will have some amount of default values. In *many cases* you will *not* need to modify these.

System defaults

With that said, the **System** defaults are what you will want to peruse, and perhaps configure, at this time. This option presents a *six*-tabbed control:



The next several pages discuss each set of defaults in detail.

The System defaults can be changed at anytime.

It is a good idea to become familiar with many of them at this early stage of using the program. In this way you will know where to go to change the "behavior" of your program as time goes on.

™ Church

The Church system defaults identify who you are.

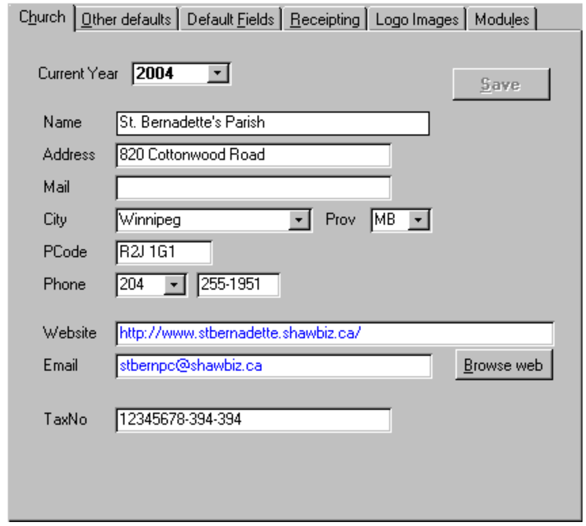


Figure 22
System defaults: Church

Current year This drop-down list identifies the default year your church is using for contribution and ministry purposes.

Name The name of your church; it cannot be modified.

Address The street address of your church.

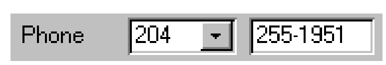
Mail The mailing address of your church — only if it is different from the address (such as a post office box).

City The city your church is located in, selected from a drop-down list. If your city is not found in the drop-down list, it must *first* be added via the City look-up table.

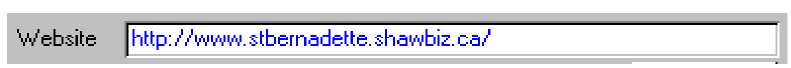
Prov The province your church is located, selected from a drop-down list.

PCode The postal code of your church.

Phone The phone number of your church. The area code can be selected from a drop-down list.



Website The URL of your church's website.



Email The primary e-mail address used by your church for information purposes.

TaxNo The Government's tax number assigned to you for receipting purposes.

™ Other defaults Miscellaneous system defaults.

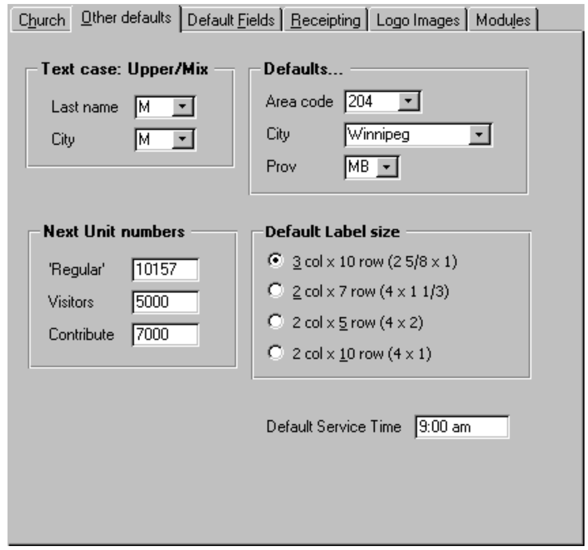


Figure 33
System defaults: Other defaults

Text case: Upper/Mix

Last name — Select a desired text case for last names entered into your database. You can select from Mix or Uppercase [we recommend Mix].

City — Select a desired text case for cities entered into your database. You can select from Mix or Uppercase [we recommend Mix].

Defaults...

Area code — The default Area code which the majority of your membership would fall into.

City — The default City which the majority of your membership would live in.

Prov — The default Province which the majority of your membership would live in.

Next Unit numbers — A unique “Unit number” is assigned to each family in your church.

‘Regular’ — What is the next unit number that should be assigned to ‘regular’-type families added to your database?

Visitors — What is the next unit number that should be assigned to visitors that are added to your database?

Contribute — What is th next unit number that should be assigned to a contribution-only ‘family’ added to your database?

Default label size — Several different mailing labels are supported in the program. Which one do you use the most often and should be set as the default selection?

Default service time — What time do *most* of your church services begin?

™ Defaults Fields

Most of the defaults are used so *you* can define the user-defined fields that are use in several of the program's modules.

Family fields

> Two 'option' fields can be re-named. Both fields on the Family screen can store *text*-type data.

Service attendance fields

> Five 'other' fields can be re-named. All of these fields on the weekly services screen store *numeric*-type data.

Person fields

> Seven fields can be re-named. The PIN/Roll# field stores *numeric*-type data while the other field names each refer to *status* (text) and *date*-type fields (ie. two fields for each classification).

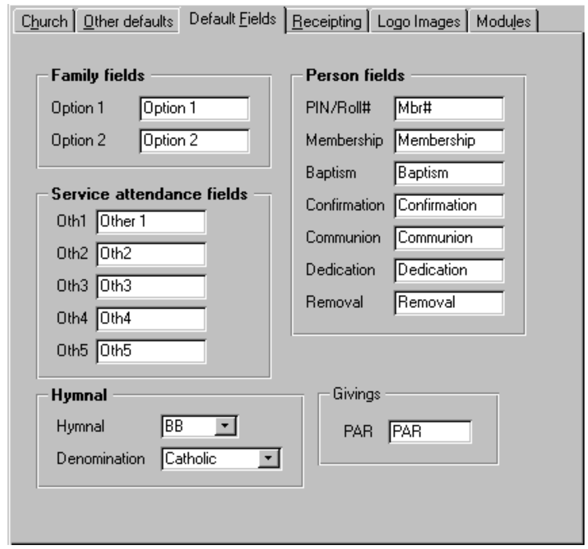
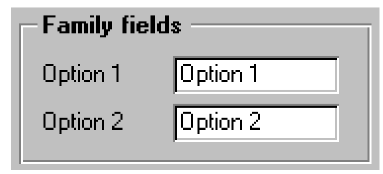


Figure 43
System defaults: Default Fields

Family fields

By default, these two user-defined fields on the family screen store 'optional' data.

You can re-name either field at anytime. Re-naming a field does *not* change the existing data stored in individual family records. It only changes the name designation that refers to the field information.



Person fields

Seven fields on the Person/Individual screen can be re-named to suit your specific needs.

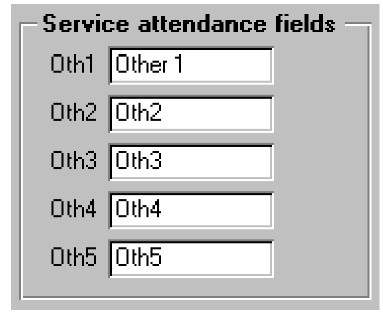
The first of these is used to identify a "Membership", or "PIN", or "Roll" number that you assign to a specific individual for those that are "members" of your church.

The remaining six designations each refer to *two* fields: a status field and a date achieved field for each item.

You can re-name any of these fields at anytime. Re-naming a field does *not* change the existing data stored in individual records. It only changes the name designation that refers to the field information.

Service attendance fields

The weekly services module allows you to record attendance for each service in several pre-defined categories, such as two morning services, an evening service, Sunday school, and nursery classes.



If you require additional attendance classifications, you can re-name these *five* ‘other’ fields to suit your needs.

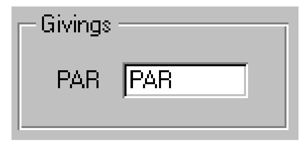
Hymnal

Two fields are used to identify the default Hymnal (or chorus book) that you use in your church and which denomination this hymnal is.

Both fields are drop-down lists where you are limited to selecting an item from the respective list. If your desired selection is not yet listed, you can add it via the respective Look-up tables.

Givings

Many churches are using an outside service of automatic deposits of donations, typically on a monthly basis, from their membership.



This field can be used to identify the acronym used by this service. An example is *PAR* — Pre-Authorized Remittance.

™ Receipting

Various receipting defaults are grouped into two sections:

- < Receipting
- < Quarterly statement

Quarterly statements are *not* numbered, whereas receipts are.

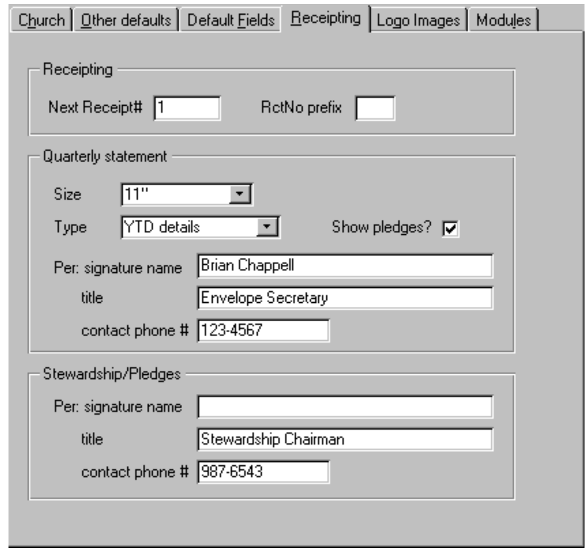


Figure 49
System defaults: Receipting

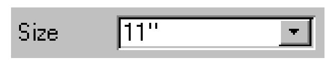
Receipting

Next Receipt# — What is the next receipt number that will be assigned? Use this to identify a starting number to be used by your system.

RctNo prefix — Do you want a prefix character to be printed in front of the receipt number?

Quarterly statement

Size — Which size of form do you wan the quarterly statement to be printed on? Two choices are available via the drop-down list: 11" or 3.66" (3-part).



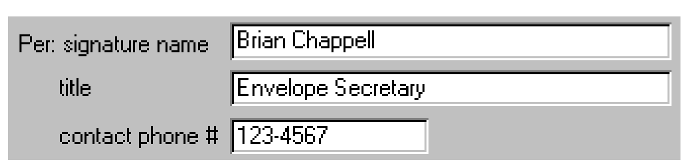
Type — Which type of quarterly statement are you most likely to print? Four choices are available, as noted in this chart:

Statement Type	Information printed			
	Statement	Quarter details	User-supplied Message	Year-to-date details
Statement only				
Show 1/4 details				
Include message				
YTD details				

Show pledges? — Do you want an individual's pledges printed on the statement beside their current donations?

This is useful information to pass along to let your membership know where they stand at the current time in relation to what they have already given.

Per: signature name — Quarterly statements have a notation printed at the end to identify the contact person within your church that maintains the donation envelopes.



Use these three fields to identify the *name*, *title*, and *contact phone number* of this individual.

Stewardship/Pledges

Per: signature name

Stewardship/pledge statement forms have a notation printed at the end to identify the contact person within your church that maintains this type of data.

Use these three fields to identify the *name*, *title*, and *contact phone number* of this individual.

™ Logo Images

Logo image defaults are grouped into two sections:

- Icons and logos used by the program that are printed on various reports
- paths to folders used to store your images taken of various items

These *system* defaults can be overridden by individual users via the Users Look-up tables section. This may be necessary if you are running the program on a network and users have different paths to the network file server.

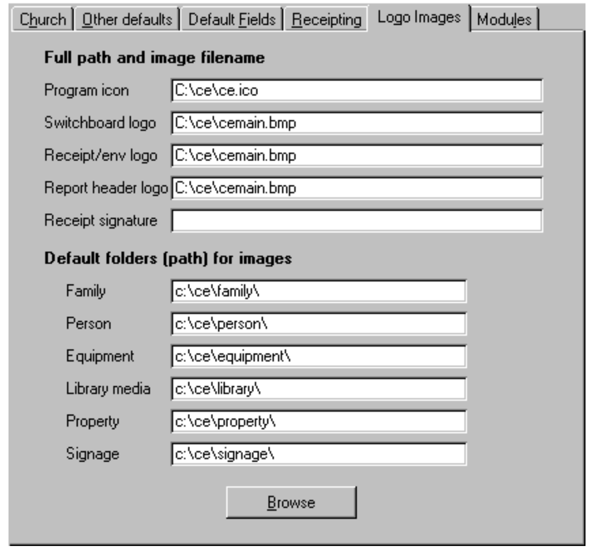


Figure 55
System defaults: Logo Images

Program icon Include the filename and the full path to the program icon image.

This image (**ce.ico**) is supplied by Adminware.

Switchboard logo Include the filename and the full path to the program logo that is displayed on the Main Switchboard.

This image (**cemain.bmp**) is supplied by Adminware but *you* can create and identify your own logo that you wish to display.

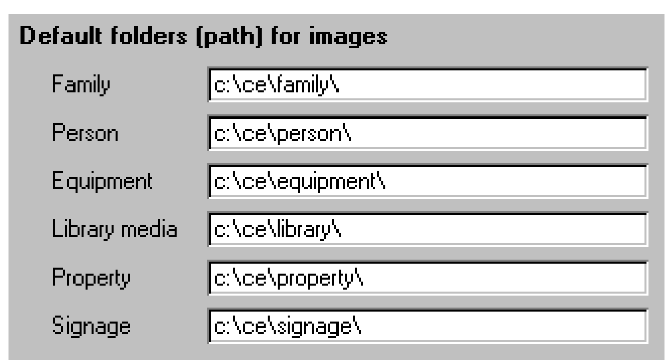
Receipt/env logo Include the filename and the full path to the logo you would like to have printed on receipts, quarterly statements, and envelopes.

Report header logo Include the filename and the full path to the logo you would like to have printed at the top of reports.

Receipt signature Include the filename and the full path to the "signature" image you would like to have printed on receipts.

Folders Several modules in the program allow you to record the filename of images that you have taken (or received from others within your church).

These six defaults are used to identify the default folder which each type of image is stored in. This provides you with a means of organizing your images.



™ Modules

This group of defaults is used to identify the various modules within the program you wish to use the present time.

You could turn 'off' those that are needed at the current time and re-instate them at anytime in the future, when the need arises.

If the Ministry module is being used, then a an additional question is asked about which month is the start of a Ministry 'year'.

These defaults apply to the entire system. That is, every user will have access to any modules that are in use ... unless you revoke an individual's right to specific modules via the security level assigned to each user (via the **Users** module).

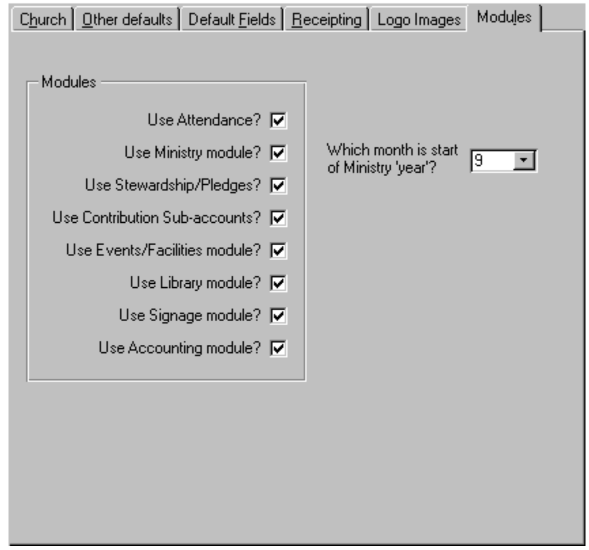


Figure 57
System defaults: Modules

User defaults

A user can change certain 'user' defaults at anytime via this part of the program ... but not their security levels (that is done only by someone with the highest security level in a different part of the program — see page 5).

A user's settings are first established by a system administrator via the Users module. This creates the user and their initial defaults (see page 5).

An individual user can modify several of their default setting via the **Look-up Tables** button from the Main Switchboard; then select the User 'radio button' on the Codes(1) tab.

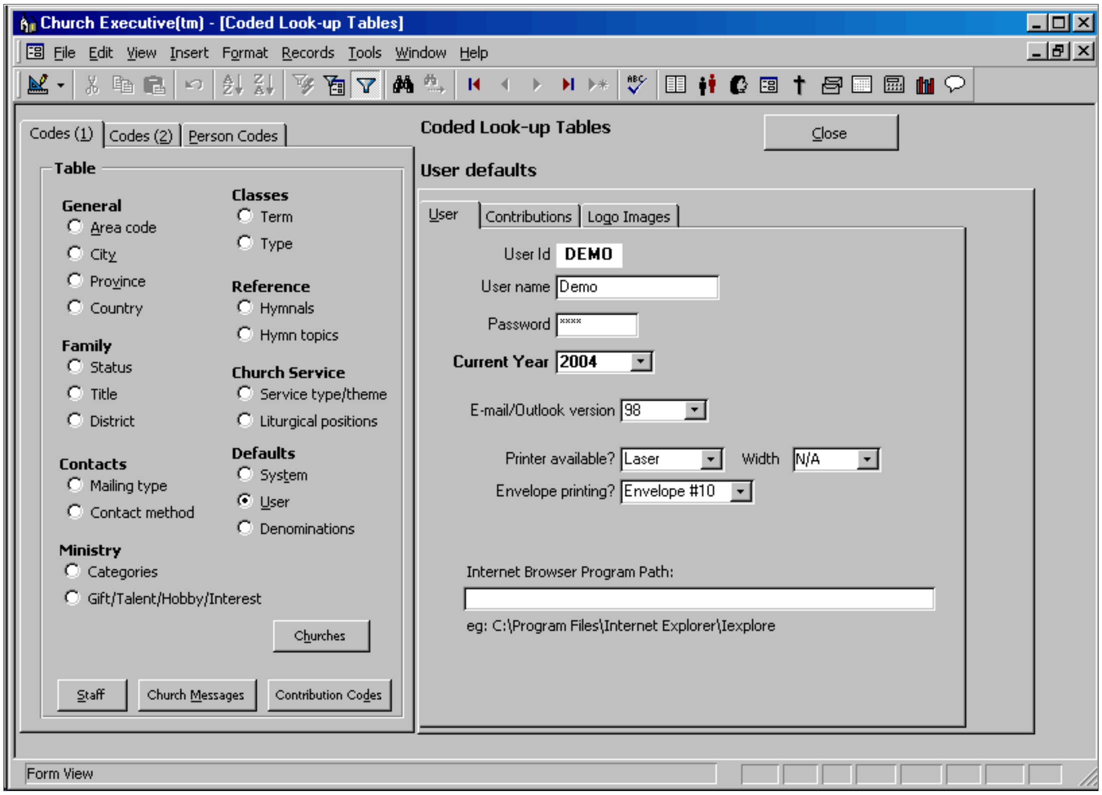


Figure 58 User defaults form

User defaults

User defaults are configured via a *three*-tabbed control:

The next couple of pages discuss each set of defaults in detail.

The User defaults can be changed at anytime.

It is a good idea to become familiar with many of them at this early stage of using the program. In this way you will know where to go to change the "behavior" of your program as time goes on.

™ User

The 'User' user defaults are generic items that were set when the user was first entered into the program (see page 5).

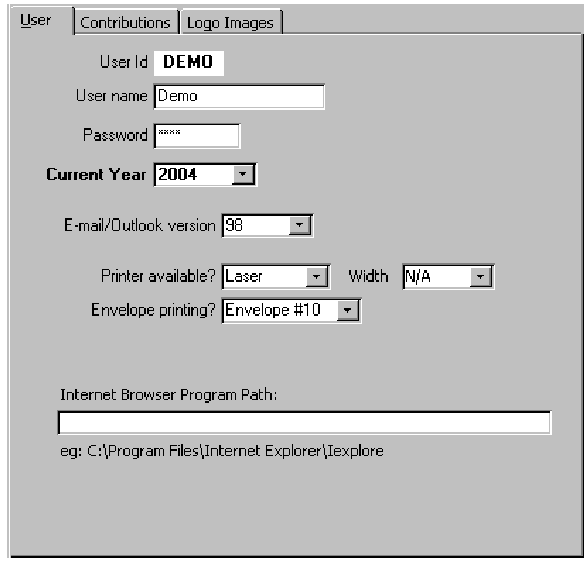


Figure 60
User defaults: User

User id — This cannot be modified by the user.

User name — What is the full name of this user.

Password — Up to 10 characters. Asterisks will appear as you enter the password. The user requires this password, along with their user id, to enter into the program.

Current Year — This drop-down list identifies the default year *this user* is using for contribution and ministry purposes. It can be different from other users, depending on the needs of each user.

Email/Outlook version — A drop-down list that identifies the version of Microsoft Outlook that this specific user has installed on *their* computer.

Printer available? — What is the default printer setting (in Microsoft Windows) for this user?

Width — What is the width of the printer used by this user?

Envelope printing? — If this user prints envelopes, how are they positioned in the printer?

Internet Browser Program Path: — What is the full path to the internet browser program used by this user? This could point to the Microsoft Internet Explorer, Netscape, or some other browser program.

™ Contributions

Just two values...

Default Service

Date What is the date of the weekly contributions service that this user is currently working with?

If this user does not have access to Contributions or Weekly Services, then these values are ignored.

Service As above, but the specific service on the date specified (in those cases where your church identifies multiple services on the same date).

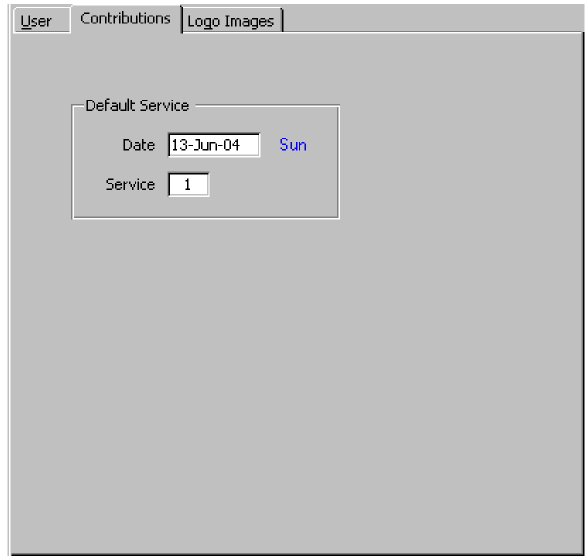


Figure 69
User defaults: Contributions

™ Logo Images

Any values recorded here override the system defaults (see page 14).

If you are working on a stand-alone computer (ie. *not* on a network), then you will not need to record any changes here — use the System defaults only.

You will only need to work with these settings if you using the program on a network and are storing images in a shared folder on the network file server.

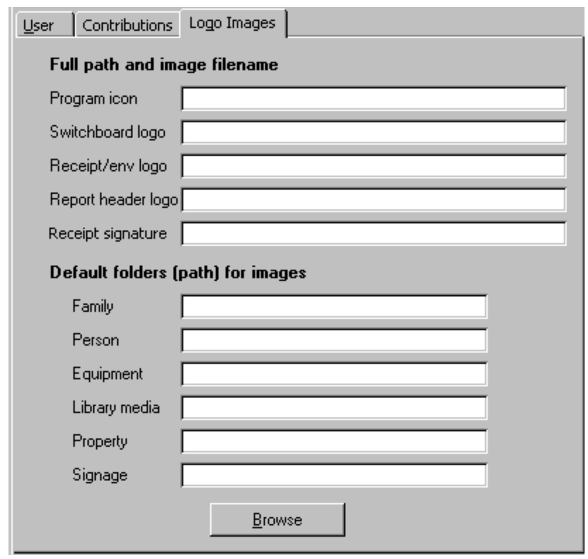


Figure 70
User defaults: Logo Images

Look-Up Tables

Why?

Look-up tables are an essential component of any relational database system, such as *The Church Executive*™ program. In order to ensure that certain data remains consistent throughout the entire database no matter who is adding or editing data, certain fields use related data found in another table. These fields *restrict* you by forcing you to select a value from a pre-defined list. This list though, can be modified at anytime — a requirement because your needs may (and probably will) change as time goes on [and, your needs will be different from another church using the program]. This allows *you* to customize the program to meet your specific needs.

From the Main Switchboard, choose the **Look-up Tables** button. This is the part of the program where the various values displayed in drop-down lists are maintained (that is, *look-up tables*).

> You *may* find that many of the existing look-up values are already either close to what you will need or require some slight additions or changes. And, as time goes on, you will probably want to add new items to certain tables, as your needs dictate. These changes will likely go on for as long as you are using the program!

Adding new values (or editing existing values) to a look-up table can be down in two ways:

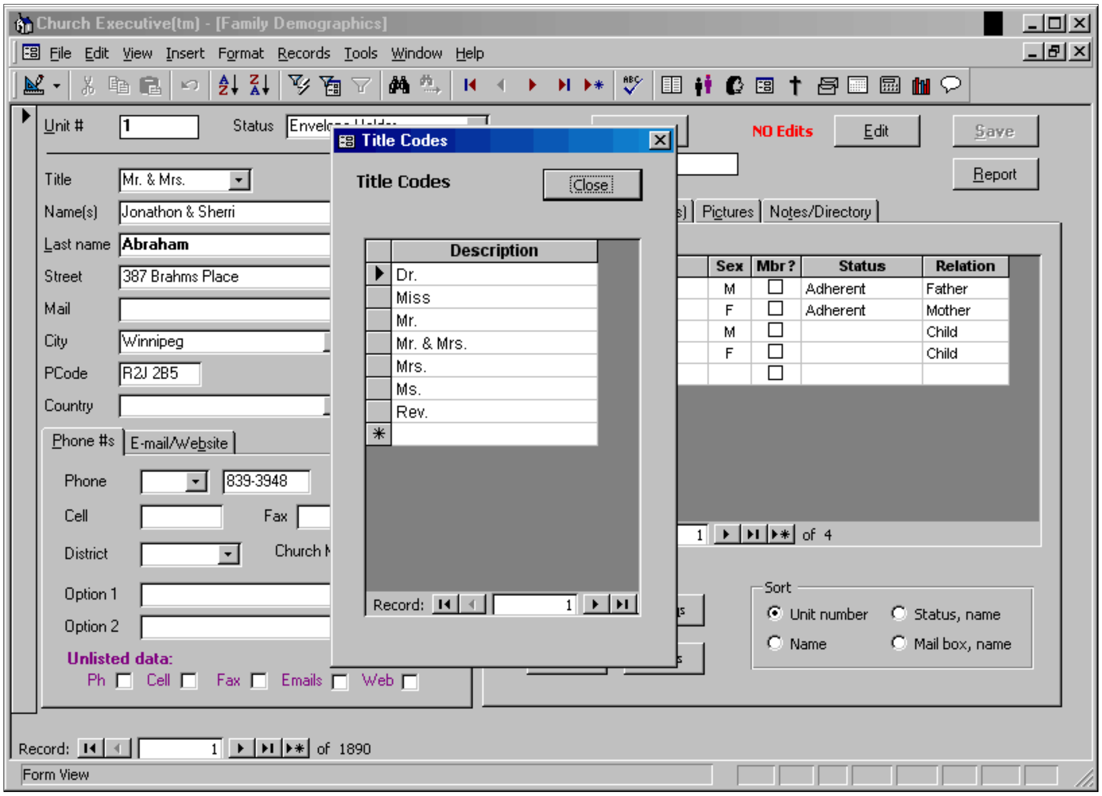
< **double-click** on the drop-down field from *any* other form within *The Church Executive*™ program. This will pop-up the respective look-up table values which can then be modified (illustrated on the next page). This is the *quickest* method available to update any of these values.

< open the Look-up Tables module, select the desired table, and add/edit to the listing on the right side of the screen (illustrated on page 21).

™ Modifying a Look-up Table List via a "pop-up"

Double-click the mouse in any drop-down list that has an editable look-up table (which is virtually every drop-down list in the program, with only a couple of exceptions). This will display the respective look-up table values in a "pop-up", as illustrated below.

In this example, the Title field on the Family screen was double-clicked:



When you finish adding or modifying an item in the pop-up and close the dialog box, the respective listing in the drop-down list that your cursor is in will automatically be updated to allow you to select the new value.

Look-up Table screen:

To ***add*** a new entry:

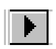
select the table to view. You may need to switch between one of the three-tabbed control.

the right side of the screen will change to provide the current set of values for the selected look-up table.

add a new entry.

To ***delete*** an entry:

click on the record selector (the grey button with the black triangle at the left side of the entry) to highlight the entire row.



press the Delete key.

you will be prompted to confirm your deletion.

If the current entry is already in use by a record in another table you will *not* be able to delete that entry.

Erasing an entry (by backspacing or pressing the delete key for each character) will ***not*** delete the entry!

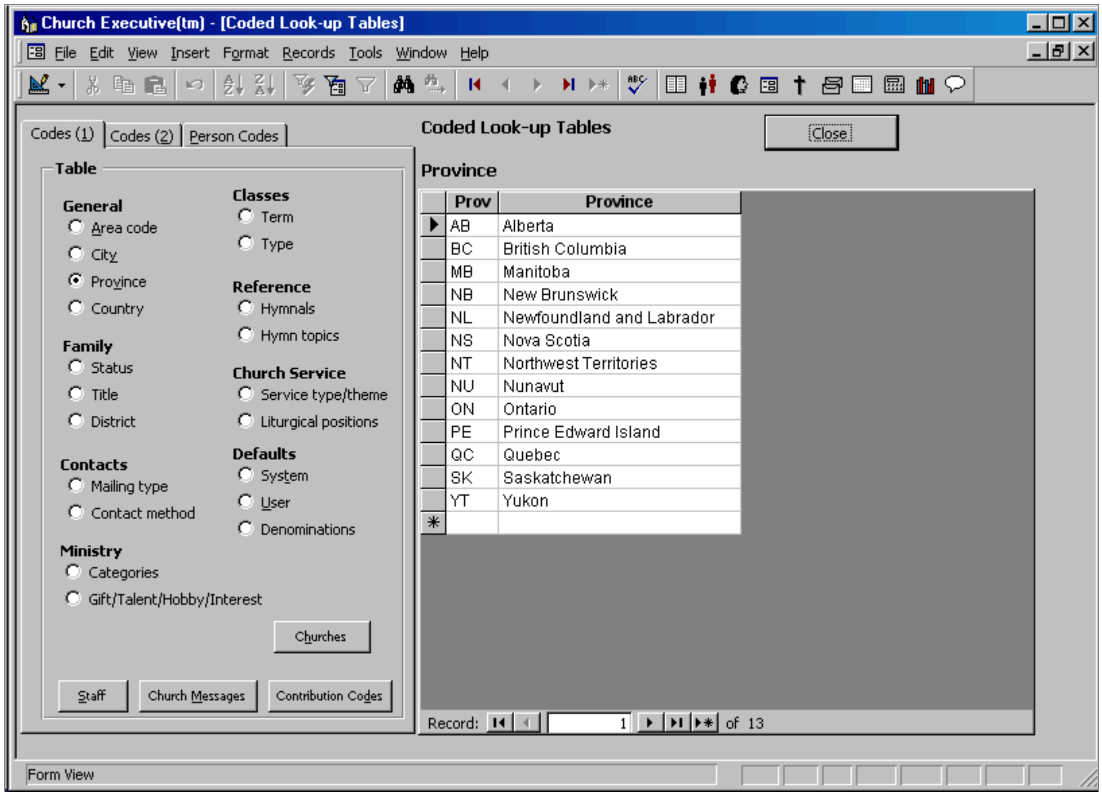


Figure 75
Look-Up Tables: **Codes (1)**

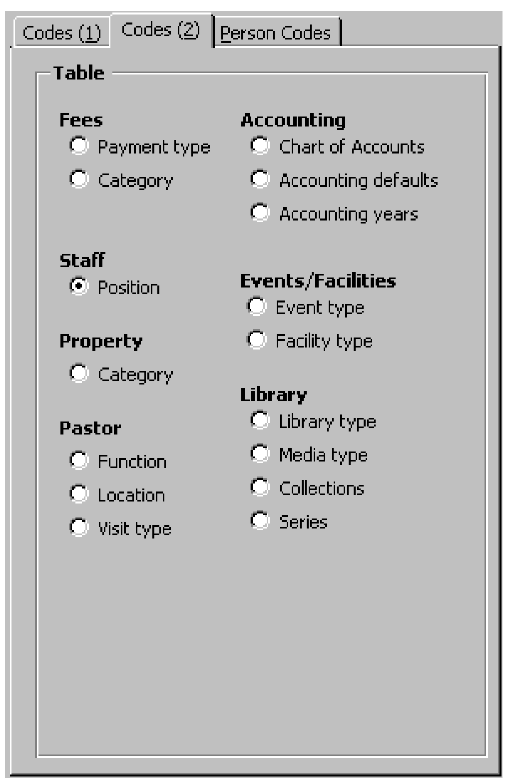


Figure 76
Look-Up Tables: **Codes (2)**

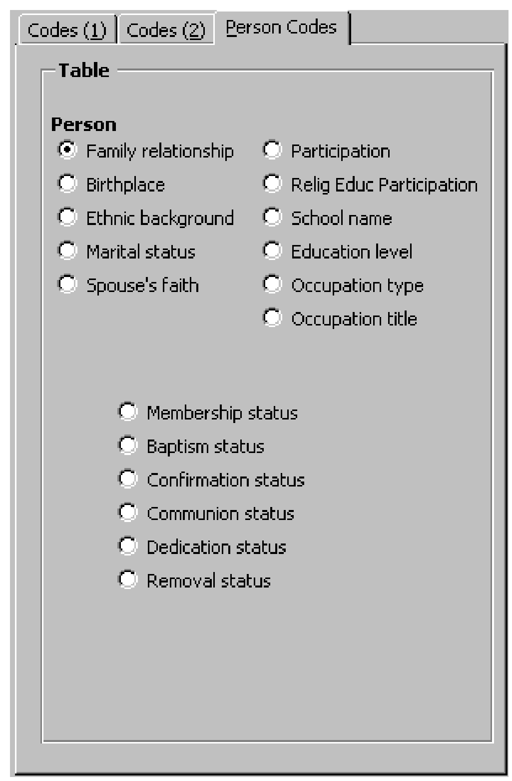


Figure 77
Look-Up Tables: **Person Codes**

™ Churches

This module is used to record any church that you have regular contact with. From here you can e-mail the church or generate labels or envelopes.

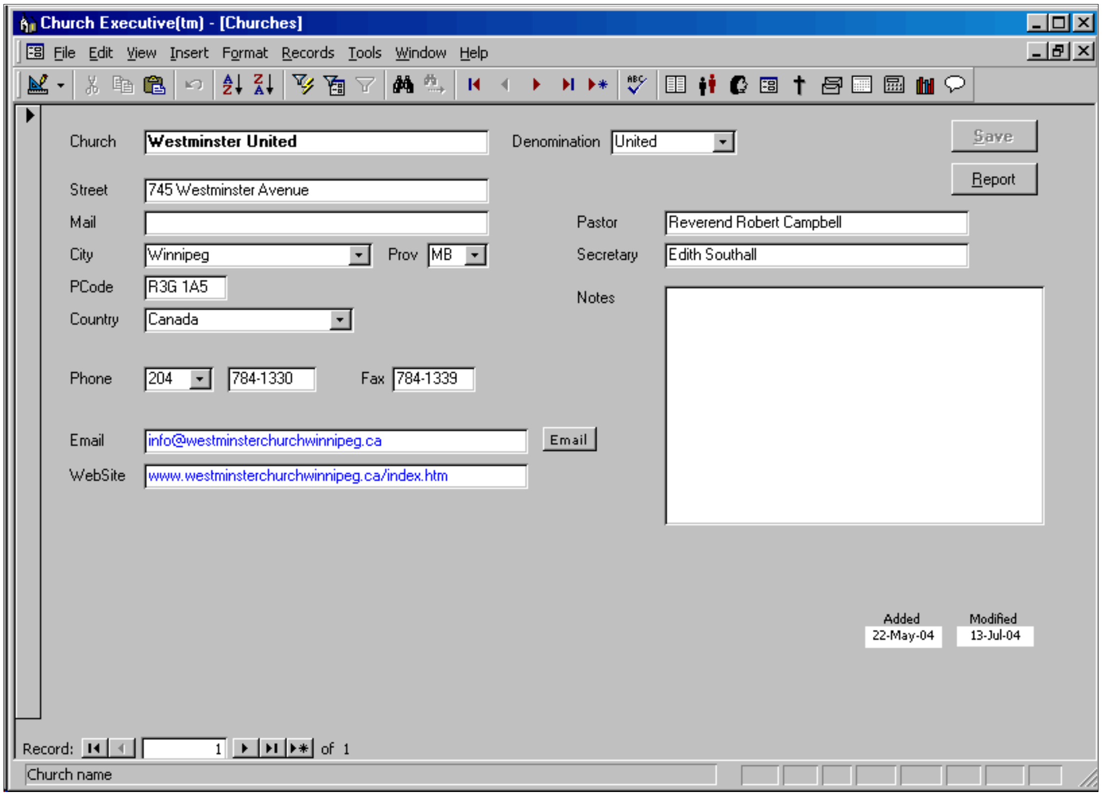


Figure 79
Churches

™ Staff

A list of staff, both present and past is maintained in this module. You can track all days absent and holidays taken, both of which could be useful for finding replacements. From here you can e-mail a staff member or generate labels or envelopes.

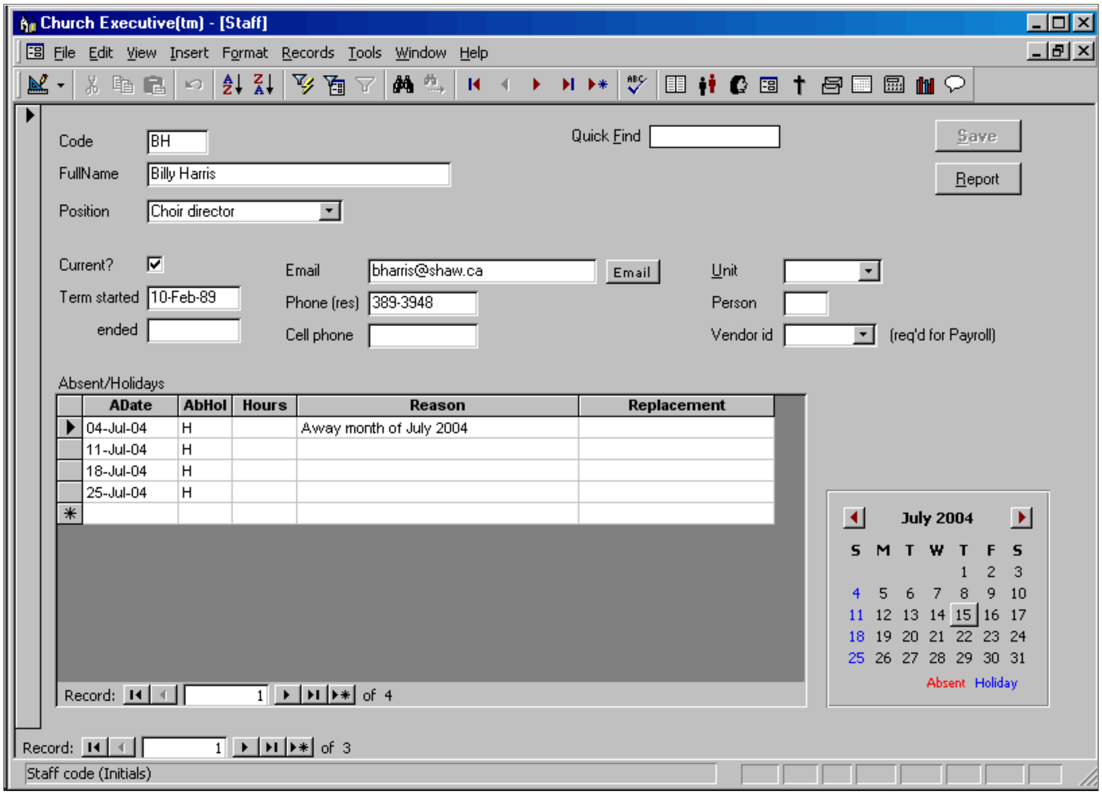


Figure 81
Staff

Note:

< if a staff entry is a *Pastor*, ensure that the Staff *code* **matches** the Pastor's *user id code*. This will provide for better handling with the Pastor Records module.

< *link* each staff entry to the corresponding Family Unit number and Person number (two fields are provided on the right side of the Staff screen for this). This will allow for home address information to be available for labels and envelopes.

< if this staff person receives a pay cheque and you will be using the payroll module, then you must *link* the staff person to the Vendor module using a *vendor id number*. This requires that the staff person is also entered as a 'vendor' in the Vendor module.

Notice that a staff person could potentially have name data entered into several modules:

Staff	ability to record absent and holiday information
Family	staff person's home address; family is printed on church roster
Person	personal details relating to church activities
Envelopes	weekly contributions and quarterly statements
Vendor	required for payroll purposes because a cheque will be issued (and can only be issued to a 'vendor')
User id	required to gain access to the program

™ Church Messages

Various reports allow you to print a message to the congregation. Those messages are maintained in this module. This allows you to keep a record of past messages that were used and re-use a message at anytime.

The *types* of messages include:

- Quarterly statement
- Stewardship
- Receipt
- Family roster
- Library book loan
- Event booking

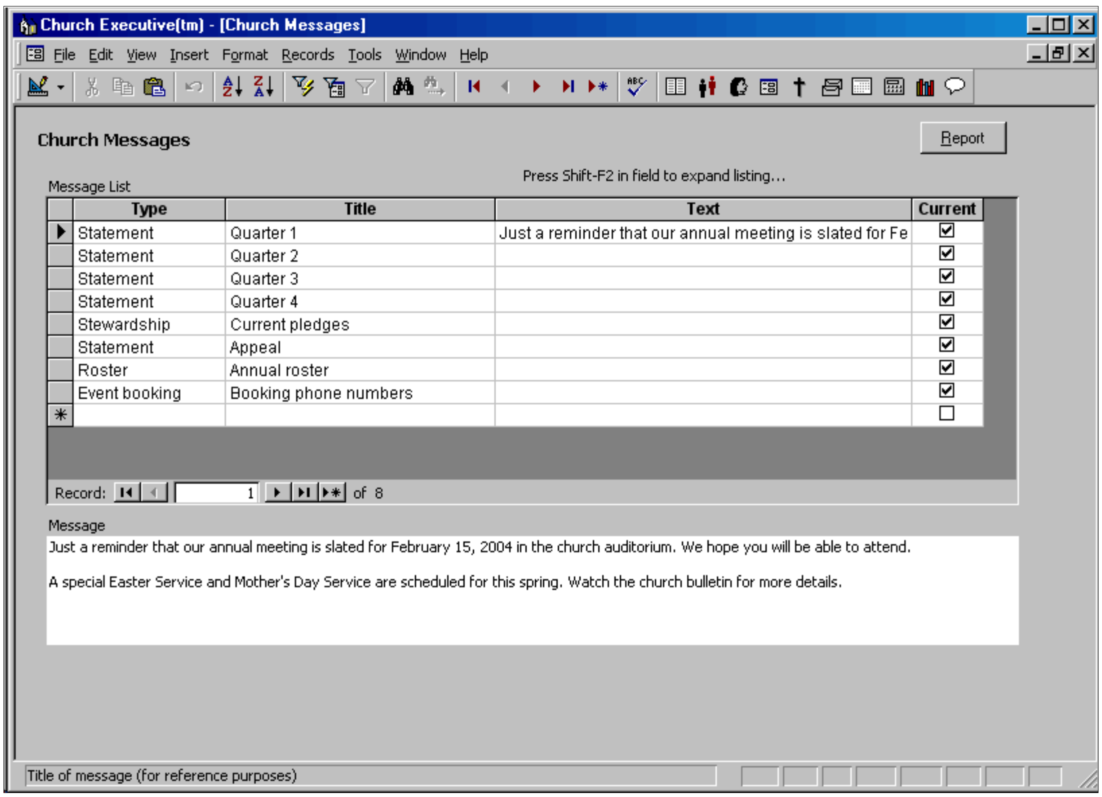


Figure 83
Church Messages

™ Contribution Codes

Annual contributions are assigned, on a weekly basis, to various contribution categories (or sometimes called *funds*). *Codes* are used to maintain this list.

Each year can have a *different* set of codes (ie. categories or funds) from any other year.

Code 0 (zero) is reserved for the "General Fund".

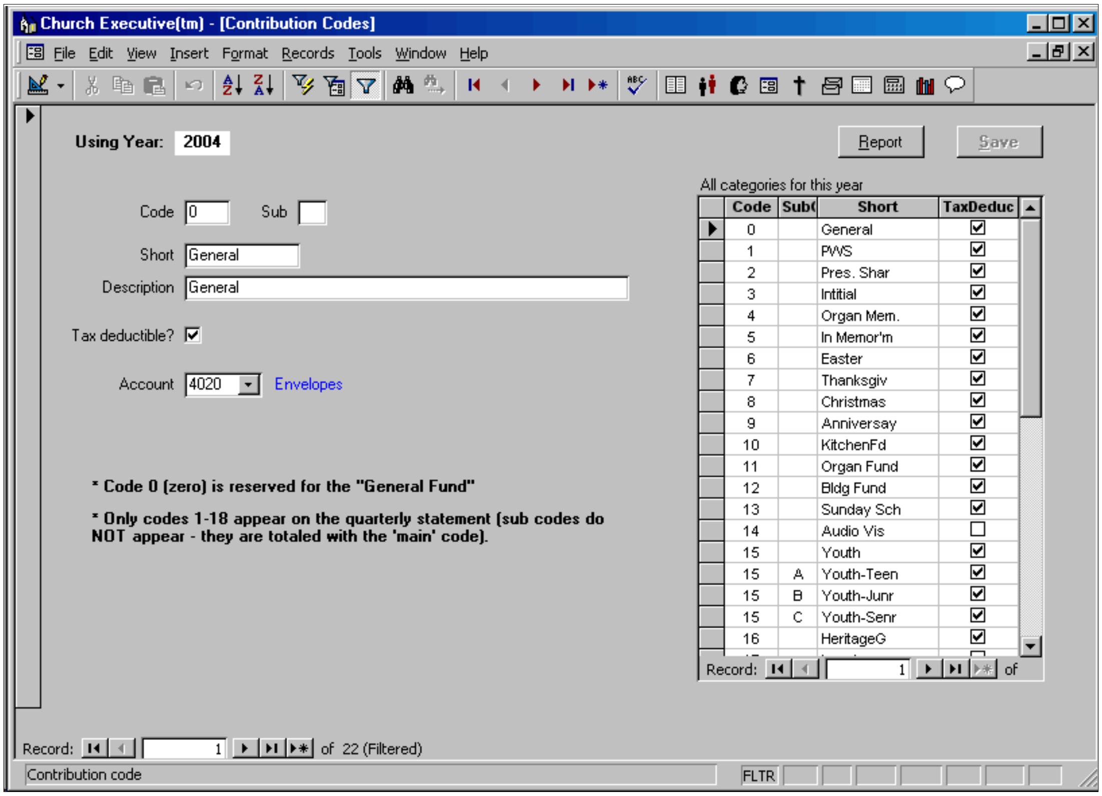


Figure 85
Contribution Codes