

# The Church Executive™ — Introduction

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## Introduction

*The Church Executive™* is an all-encompassing database that meets the needs of any church, no matter how large or small or which denomination.

The database consists of several modules:

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- < Family demographics
- < Personal details
- < Classes
- < Pastor records
- < Ministry
- < Chorus/Hymns
- < Envelopes
- < Stewardship
- < Weekly services
- < Weekly contributions
- < Accounting
- < Events
- < Facilities
- < Library
- < Signage
- < Property
- < coded Look-Up tables
- < System and User configuration (including security)

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## New features

Access allows us to incorporate new and exciting features that were either not implemented or available in DOS version of *The Church Executive™*. Here is a sample:

These are features that are new to the Windows version of *The Church Executive™* that were not in the DOS version.

- < e-mail button on respective screens. Takes e-mail address and loads *Outlook* automatically.
- < incorporate images, such as family, person, and church signage.
- < move between various modules with far greater ease.
- < multiple forms (modules) open at the same time.
- < reporting: multiple criteria options available; print preview; reports can have images.
- < cut and paste between any other Windows application.
  
- < new *modules* for: Classes, Chorus/Hymns, Accounting, Events, Facility usage, Library, Signage.

## Terminology

- Database the *complete* set of tables, forms, queries, reports, programming code.
- Table an individual set of information, such as a Family list or a Envelope list.
- Fields individual pieces of information for each table, such as Phone number, envelope number, etc.

Certain fields at certain times may be *disabled* — they cannot be modified based on the current conditions. You must wait until the field is *enabled* before the cursor can be placed in the field.



Fields that are “flat” and without any border are either look-up fields from another table or calculated fields (this is by design). *Sunken* fields can be edited.

### Data types

We are aware of the most common data types for fields: Text, Numeric, String, etc.

Access has a data type called *null*. This is when the field contains *nothing*, not even a space. A field that contains even a space (by hitting the space bar) contains *something* and is no longer null. When doing queries, it is quite common to query on *IsNull*, that is, only find those records where this field contains *nothing*.

### Edit/Saved records

As soon as you begin typing in a field in a record, that record is locked and editing begins. The icon in the left hand bar (called the *record selector*) on the form changes from a black triangle to a pencil. As long as the pencil icon is present, the data for this record has *not* been saved — moving to another record, opening another form, or clicking the Save button on the *form* will save the data.

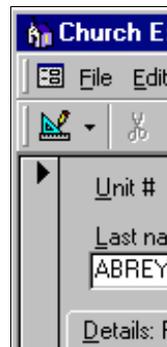


Figure 3  
Saved record

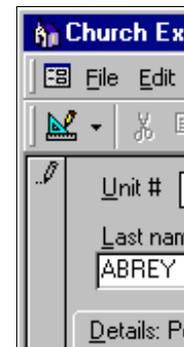


Figure 4  
Edited record



Figure 5  
Locked record

Symbol	Meaning
	Current record: This is the current record; the record has been saved as it appears.
	Pencil: You are editing this record; changes to the record aren't yet saved.
	Locked record: This record is locked by another user; you can't edit it (Microsoft Access database only).
	New record: This is a new record that you can enter information in.

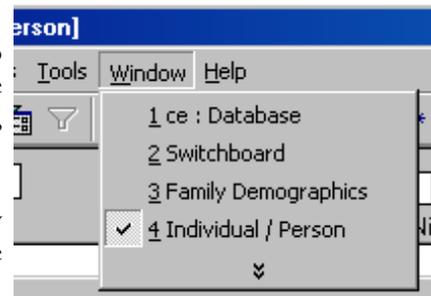
## 'Generic' Access

You may be using *The Church Executive™* via the Microsoft Access program (version 2000, 2002, or 2003). If so, this page may be of interest.

Access is an extremely powerful program. To take advantage of its capabilities, we have developed custom input forms, many of which are based on queries. The custom designed reports are based on selection criteria input forms and queries.

However, there will rare occasions when we will need to work with the raw data. This will involve working with the various underlying Access *objects* — tables, queries, reports, and forms.

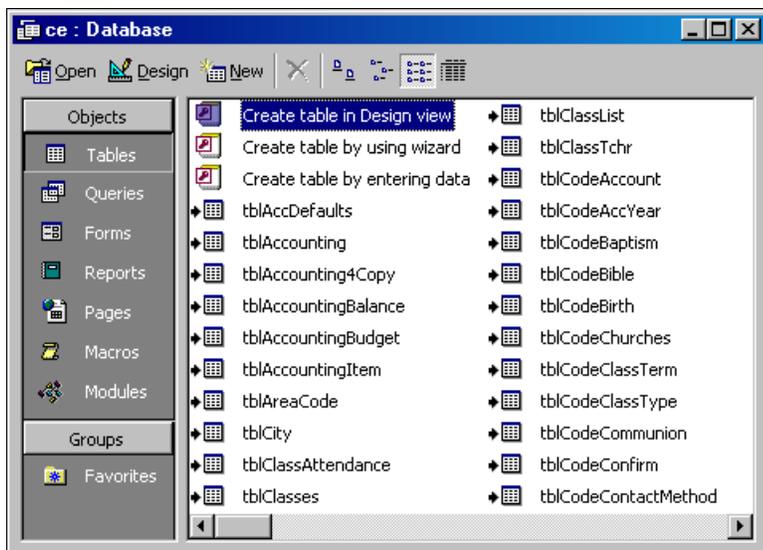
Use the **Window** pull-down menu to gain access to this raw data. The first menu option, **ce : Database**, gets us to the Access objects screen.



The Access **Objects** are grouped into common categories:

- < Tables
- < Queries
- < Forms
- < Reports
- < etc.

Clicking on the object name at the left will display those respective objects.



### Caution:

**Do *not* design and change any of the existing tables, forms, queries, reports, etc. as they are essential to the proper working of the program.**

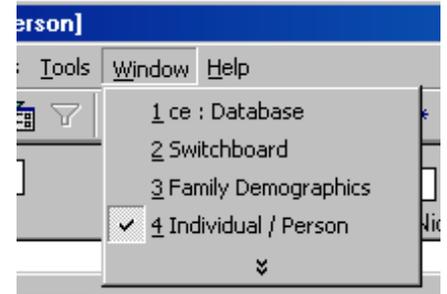
***Adminware* takes no responsibility for any changes you make that renders the program non-functional!**

## Navigation

As with any Windows program, there is usually more than one way to accomplish a given task. Moving throughout *The Church Executive™* is no different.

Following are various methods of moving from one module to another:

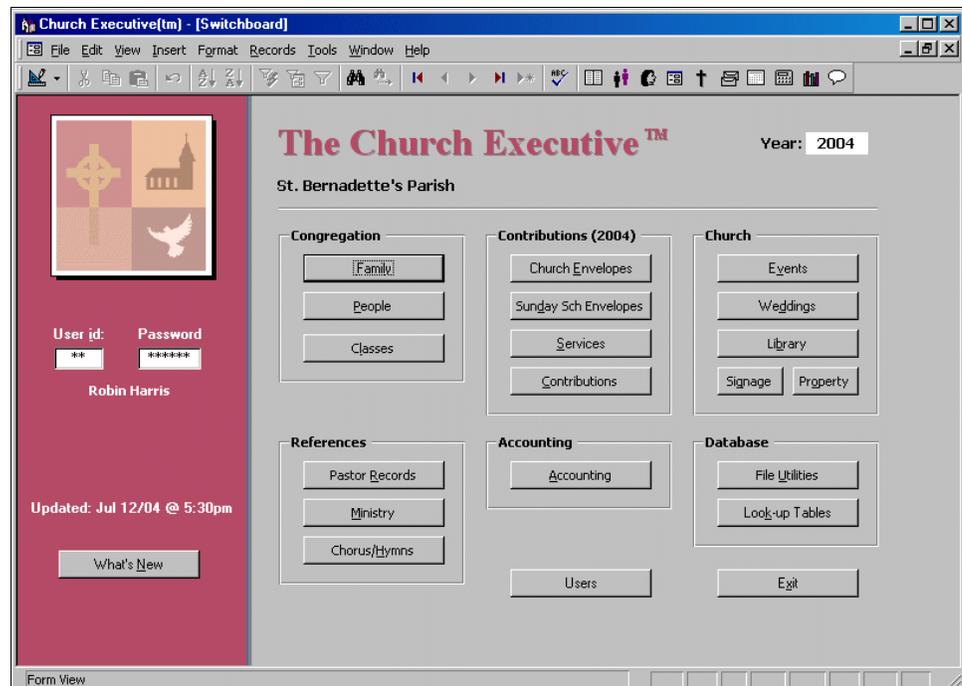
- < via the Main Switchboard. This is the form (screen) that appears first when the program is loaded. There are buttons available to each of the various main modules. From within a given module there will be other buttons to move you to sub-modules.
- < use the **Window** pull-down menu. The Window pull-down menu (**Alt-W**) will list all of the currently open modules. Pressing the number of the desired module will move you to that module. If the module you want is not yet open, choose **2 Switchboard** and then select the button.
- < the Toolbar has icons to open/move you to the desired module:



**Figure 10**

Switchboard People Ministry Services Library  
Family Pastor Envelopes Contributions LookUp

- < double-click on a family unit number, person number, envelope number, vendor number, accounting transaction, etc. from any module will move you to *that* module and display the corresponding record.



**Figure 11** Main Switchboard

## Mouse vs Keyboard

Most people use the mouse in Windows applications to move around the screen and to choose commands — that is the nature of a graphical-based interface. However, a database program is a *data-oriented* application where the keyboard is used extensively to add and edit information. Much effort has been made to provide keystroke options as often as possible.

In *any* Windows application, an **underlined** letter indicates that a keystroke (*Alt-letter*) will invoke that option/command.

In the illustration to the right, pressing **Alt-I** will invoke the Insert pull-down menu; *but Alt-U will place the cursor in the Unit # field!* — why take your hand off the keyboard, find the mouse, move the mouse so the insertion point is in the Unit number field, click the left mouse button, put your hand back on the keyboard, and continue working?

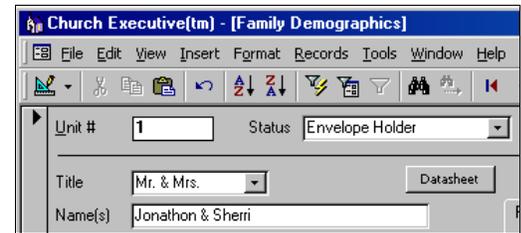


Figure 12 Alt-letter selecting

With that said, there *are* many instances where the mouse is more efficient than using the keyboard.

## Find

Finding a specific record is an important part of working with, and editing, your data. There are a number of options available to move through the records in a table.

- < use a Quick Find option to find one (or more) matching record(s).
- < use a 'Jump' option to pop-up a matching list of records.
- < move one record at a time, either forward or backward. This will only be of benefit if the data in the table is in a logical order pertaining to the type of editing you are doing. There are two places on the form that you can move this way:
  - < via the Toolbar
  - < via the record selector at the bottom of the form



Figure 13  
Toolbar record selector  
[First Previous Next  
Last AddRecord]



Figure 14  
Record selector (bottom of form)

- < use Access' Find feature (**Ctrl-F**) from *most* fields. This will search the current field for the desired information, displaying one entry at a time. You *cannot* use this feature in subforms or in datasheet views as there is very limited information in these lists.

## Field movement

When moving through fields on a form, either adding a new entry or editing the existing entry, use the **Tab** key to move to the next field and **Shift-Tab** to move back to the previous field.

Key	Movement
<b>Tab</b>	next field
<b>Shift-Tab</b>	previous field

## Watch out for...

Here are some known *features* and/or *bugs* that one should be aware of...

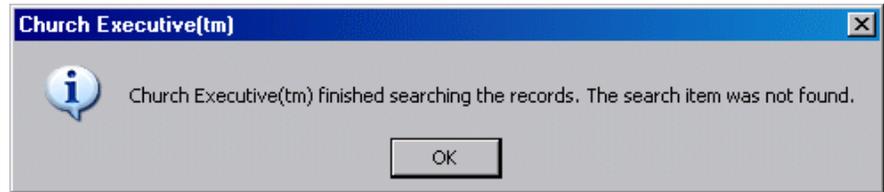
### Find (Ctrl-F)

Access' Find (**Ctrl-F**) command, like the Find feature in Microsoft's other products, is really called Find *next*. The key word here is *next*.

Access begins its find (search) starting with the *next* record, **not** the *current* record.

Consider the following:

- < you are sitting in the family screen in the unit number field on unit# 1000.
- < you do a Find (**Ctrl-F**)
- < you search for unit number 1000.
- < you will receive the following message:



This message is suggesting that Unit # 1000 does not exist in the family table (even though it does!). However, based on the Access Find *next* feature, Unit# 1000 does *not* exist *after* the current record (and it wouldn't because each Unit number is unique).

### Editing text

Be cautious of *selected* text.

Text is selected when it is highlighted (ie. white on a black background). Just like in any Windows application (such as *Word*), if text is selected and you begin typing, the *entire selected text will be replaced with the new text*. Be cautious of this but also, use it to your advantage!



If you want to delete a lot of text, select it and then press the delete key! Done.

## Pull-down menus

It has been mentioned before that using the keyboard can be quicker than the mouse in many instances. If you get in the habit of using the keyboard to select fields, buttons, and pull-down menu options, you may fall into the following problem...

If you press the **Alt** key, change your mind, and do *not* select any other key, you have actually activated the pull-down menu!

Here is the generic Access pull-down menu:



Here it is again when the **Alt** key is pressed once and then released:



Notice the **File** menu option — it has been selected, as indicated by the raising of the word!

If you now press a letter associated with one of the pull-down menus (say **T**), you will pull-down that menu option — even though you might be expecting the T to be typed into the current field you are editing.

To de-activate the pull-down menu you can:

- < press the **Esc** once (if you have a menu pulled-down you will need to press **Esc** twice — once to get rid of the menu and a second time to leave the pull-down menus altogether).

Or

- < click the mouse somewhere on the screen.

**Dates** Date fields in the program are displayed as dd-mmm-yy.

When entering dates, you can simply enter 'Jun 19'. Access will automatically convert this to 19-Jun-02 (or whatever the current year is).

- < A two-digit year is converted to four digits, where less than 30 becomes 20 $nn$  and greater than 29 becomes 19 $nn$ .
- < To enter *today's* date, press **Ctrl-;**

## Where am I?

Take a look at the following image. Where is the cursor?

The screenshot shows the 'Church Executive(tm) - [Family Demographics]' window. The 'Family Members' tab is active, displaying a table with the following data:

No	FirstName	Sex	Mbr?	Status	Relation
1	Jonathon	M	<input type="checkbox"/>	Adherent	Father
2	Sherri	F	<input type="checkbox"/>	Adherent	Mother
3	Jason	M	<input type="checkbox"/>		Child
4	Susan	F	<input type="checkbox"/>		Child

Answer: notice the **Family Members** tab (right side, down about an inch) — there is a dotted border around the tab control.

There are many fields, menus, buttons, tabs, sub-forms, lists, etc. found on any one form in *The Church Executive™*. When you press the Tab key to move from one field to the next you may also need to pass ‘over’ a tabbed control or button. As you do so, it may appear as though you have lost the cursor.

Here are some examples of what the cursor may look like as you move about the screen:

End of field (blinking)	Datasheet with entire field selected	Button (dotted border around text)	Tabbed control (dotted border around text)	Pull-down menu activated

**Tip:** In many cases, don't worry about where you are, but rather *where you would like to be*. Simply click the mouse where you want to go or select a button or field by pressing the Alt-letter option.

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## Backup

By far the most important function which needs to be managed with *any* computer system is the backup of data.

All of the information that you have entered into *The Church Executive*<sup>TM</sup> is stored in **ONE** database file: **ce\_be.mdb**

### Stand-alone

On a typical stand-alone system this file will be in the **c:\ce** folder.

### Network

If you are running on a network then this file may be in a **f:\ce** folder (or some other drive or folder designation — where ever it was placed as part of the installation of the program by yourself or a network administrator).

[The above c:\ce and f:\ce are the most typical location for the ce\_be.mdb file. There is a possibility that the program and/or data was placed into different folders at the time the program was installed.]

### File Size

The **ce\_be.mdb** will be *too large* to fit onto a single floppy disk. You will need to either use a Zip disk (such as the Iomega line of products), a large capacity Memory (or flash) key, or a writable CD or 'better' (such as a re-writable CD or DVD).

Hazards      Some of the hazards to be aware of, which could cause information to be lost or destroyed, include:

- < static electricity
- < power surge
- < magnetic interference
- < faulty hardware (computer or hard disk)
- < faulty network cards, cabling, or routers
- < cigarette smoke
- < coffee or food spills
- < theft
- < vandalism
- < fire
- < out-of-date version of Microsoft Access
- < tampering with data

A few of these problems can 'creep up' on your system such as a faulty disk drive. Others are beyond the control of a church, such as fire.

Having a regular system in place for backing up your daily, preferably on a *daily* basis, is essential.

We strongly recommend that you have a *different* backup disk (either Zip or CD) for *each* day of the week, plus a weekly set.

Each backup media would be labelled as following:

- < Monday
- < Tuesday
- < Wednesday
- < Thursday
- < Friday
- < Weekly

Of course, if you are entering or modifying lots of data on Saturdays, then an additional disk should be available.

In this scenario you would only use the Monday disk on a Monday – never on any other day of the week.

If you already have a backup routine in place for backing up your other important files (such as word processing documents, spreadsheets, or accounting information), then you will want to add the **ce\_be.mdb** file to this routine.

## Using other stand-alone computer(s)

If you are using two (or more) computers as stand-alone systems (not networked) to work with *The Church Executive™* data, you will need to transfer information from the ‘master’ computer to the ‘other’ computers.

The general procedure is as follows:

- ➊ only add and update data on one computer (the ‘master’ computer).
- ➋ backup the **ce\_be.mdb** file from the master computer.
- ➌ walk (or run or drive!) to the other computer. This ‘other’ computer could be in the church or at your home.
- ➍ restore the backup (**ce\_be.mdb**) to the other computer.

[It goes without saying that the ‘other’ computer will need to have *The Church Executive™* program installed on it.]

- ➎ the other computer now contains updated data ... until information is added or changed on the ‘master’ computer.

Almost **NEVER** transfer a backup from an ‘other’ computer to the ‘master’ computer.

When you receive a program update, don’t forget to update *all* of the ‘other’ computers that are running *The Church Executive™*.

Be aware that you will be providing the other computer with **ALL** of your church’s data that is stored in *The Church Executive™*, including names, address, phone numbers, donations, accounting, pastor records, etc., etc.