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

Introduction

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

The Church ExecutiveTM 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.

[&]quot;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 <i>both</i> the front end (ce.mde) and the back end (ce_be.mdb) be installed in the same folder, called simply <i>ce</i> .	The back end (ce_be.mdb) will be installed on a network server; the front end (ce.mde) will be installed on <i>each</i> workstation.		
	① Create a folder on your hard drive (likely C:) and call it ce	 create a folder on your network server (likely F:) and call it ce 		
	 Copy the program files into this folder. The files will consist of: 	Copy the program files into this folder. The files will consist of:		
	 ce.mde ce_be.mdb ce.ico cemain.bmp 	 ce.mde ce_be.mdb ce.ico cemain.bmp 		
	 any logo/images to be used in the program 	 any logo/images to be used in the program 		
	③ Create a shortcut on your desktop to run the program. Change the icon to be ce.ico.	 On <i>each workstation:</i> ③ Create a folder on your hard drive (likely for and cull it as 		
	 Run and configure the program as noted on pages 3 and 5. 	 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.IIIUE

- ce.ico
- cemain.bmp
- any logo/images to be used in ► the program

- Create a shortcut on your desktop to run (5) the program. Change the icon to be ce.ico.
- 6 Run and configure the program as noted on pages 3 and 5.

Configuring Access

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

This section should be done only once on each computer, and is necessary if you are using Microsoft Access 2000, 2002, or 2003.. Using the **<u>T</u>ools** | **<u>Options</u>** feature, we can configure certain features of Access.

View tab

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

Options	<u>?</u> ×
View General Edit/Find Keyboard Datasheet	Forms/Reports Advanced Tables/Queries
Show	
Startup dialog box	System objects
✓ New object shortcuts	Windows in Taskbar
Show in macro design	
) Na <u>m</u> es column	J Conditions column
Click options in database window	Dual font support
 Single-click open Double-click open 	
	OK Cancel Apply

General tab

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

tions		<u> </u>
iew General Edit/Find	Keyboard Datashee	t Forms/Reports Advanced Tables/Queries
Print margins		Name AutoCorrect
Left margin:	0.5"	✓ Track name AutoCorrect info
Right margin:	0.5"	Perform name AutoCorrect
		Log name AutoCorrect changes
Top margin:	0.5"	
Bottom margin:	0.5"	
efault database folder:		New database sort order:
C:\My Documents\		General
Compact on Close		This database All database OK Cancel Accil/
tions		?
iew General Edit/Find	Kevhoard Datashee	+ Forms/Reports Advanced Tables/Oueries
-Default find/venlage behavit		- Confirm
 Fast search 	Jr	Record changes
C General search		Document deletions
C Charles of Stable seconds		

Edit/Find tab

otions	?
view General Edit/Find Keyboard Datashee	t Forms/Reports Advanced Tables/Queries
Default find/replace behavior East search Seneral search Start of field search Filter by form defaults for ssc2000 Database	Confirm Record changes Document deletions Action queries
Show list of values in Cocal indexed fields Cocal nonindexed fields ODBC fields	Don't display lists where more than this number of records read: 1000
	OK Cancel Apply

Keyboard tab

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

Options	? ×
Options View General Edit/Find Keyboard Datashe Move after enter Dog't move Next field Next record Arrow key behavior Next field Next field Next character Keyboard	? × et Forms/Reports Advanced Tables/Queries Behavior entering field C Select entire field G Go to gtart of field G Go to end of field ✓ Cursor stops at first/last field
	OK Cancel Apply

Advanced tab

- the Default open mode must be <u>Shared</u>.
- the Default record locking must be **Edited record**.
- the Open databases using record-level locking must be checked.
- change the <u>Refresh interval</u> (sec): to 10.

/iew	General	Edit/Find	Keyboard	Datasheet	Forms/Reports	Advanced	Tables/Queries
DDE I V Comm. Comm. OLE/D Refres Numbe ODBC Ugdat	operations gnore DDE inable DDE and-line arg DE timeout sh interval (er of update refresh interval e retry inte	requests refresh quments: (sec): sec): e retries: erval (sec): rval (msec)	ľ	30 10 2 1500 250	Default open m Shared Exclusive Default record No locks All records Edited reco Jopen databa	ode locking rd ses using rec	2rd-level locking
					ΟΚ	Cance	al Anala

Configuring The Church Executive™

This section should be done only once on each computer. Configuring The Church ExecutiveTM 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

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!

h Church Executive(tm) - [Users]	IJ×
🔄 Eile Edit View Insert Format Records Iools Window Help	۶×
थ - % 🖻 🖻 ∽ 🛃 💱 🗃 ▽ 🏘 🌦 🙌 ◀ → א 👀 🖤 🗉 🛉 🕼 🖬 🖬 🖓	
User Id DEMO Year 2004 Printer available? Laser Save User name Demo Width N/A Is this user a Pastor? Is this user a Pastor? Password ***** Envelope printing? Envelope #10 Is this user a Pastor?	
Security levels Family 5 Services 5 Events 5 0 - no access Person 5 Envelopes 5 Weddings 5 1 - look only (no edits) Visitation 5 Sun Sch Env 5 Library 5 2 - add (no edit/delete) Attendance 5 Contributions 5 Property 5 4 - add, edit, delete Pastor 5 Classes 5 LookUp 5 5 full access References 5 Accounting 5 Report 5 Image: to see the new values. Ministry 5 Payroll 5 Security 5 set all to 5	
User list	
Userld UserName Pswd Pastor Year OpenMod OutlookVer Ptr Envl Fam Per Visit Class Att Min	
DEMO Demo ***** 2004 98 L E 5 5 5 5 Record: IM IM IM IM IM IM IM IM	
Record: I </td <td>- - //.</td>	- - //.

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 User Id DEMO 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 <i>this user</i> 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 <i>their</i> 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? Width N/A 🗾
Envelope printing?	If this user prints envelopes, how are they positioned in the Envelope printing? Envelope #10 •
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.

Secu	ritv	levels
Secu	unty	161618

- Security lev	els			
Family 月	5 Services	5 Ev	ents 5	0 - no access
Person	5 Envelopes	5 We	eddings 5	1 - look only (no edits)
Visitation 8	5 Sun Sch Env	/ <mark>5</mark> Lib	orary 5	2 - add (no edit/delete)
Attendance	5 Contributions	5 Pro	operty 5	 3 - add and edit (no delete) 4 - add edit delete
Pastor 8	5 Classes	5 Lo	okUp 5	5 - full access
References	5 Accounting	5 Re	port 5	
Ministry 🛛	5 Payroll	5 Se	curity 5	Set all to 1 👻
	Fees	5		

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

Look-up Tables

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*).

Codes (<u>1</u>) Codes (<u>2</u>) <u>P</u> er	'son Codes	Coded Look-up Tables
-Table		System defaults
General © Area code	Classes C Term	Church Dther defaults Default Fields Receipting Logo Images Mod
City	С Туре	Current Year 2004 💽
C Province	Reference C Hymnals	Division
Family	C Hymn topics	Address Address
C Status	Church Service	Mail
C Title	C Service type/theme	City Winnipeg 💽 Prov MB 💌
O District	U Liturgical positions	PCode PCode
Contacts	System	Phone 204 💽 🕵
C Contact method	O <u>U</u> ser	
Ministru	O Denominations	Envil Physics 201701 Physics Articles II
C Categories		
C Gift/Talent/Hobby/	Interest	TaxNo
	Churches	
<u>S</u> taff Church <u>M</u> e	ssages Contribution Co <u>d</u> es	

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:

Def	aults
Θ	System

C <u>h</u> urch	<u>O</u> ther defaults	Default <u>F</u> ields	<u>R</u> eceipting	Logo Images	Modules	
-----------------	------------------------	------------------------	--------------------	-------------	---------	--

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. Church Other defaults Default Fields Receipting Logo Images Modules Current Year 2004 Save Name Address
Current year	This drop-down list identifies the default year your church is using for contribution and ministry purposes. TaxNo 12345678-394-394
Name	The name of your church; it cannot be modified. Figure 22 Sustem defaults. Church
Address	The street address of your church. Address
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 <i>first</i> 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. PCode R2J 1G1
Phone	The phone number of your church. The area code can be Phone 204 -
Website	The URL of your church's Website Website
Email	The primary e-mail address used by your church for information purposes.
TaxNo	The Government's tax number assigned to you TaxNo [12345678-394-394 for receipting purposes.

Other defaults	Miscellaneous system defaults.	Church Other defaults Default Fields Receipting Logo Images Modules
		Text case: Upper/Mix Defaults
		Last name M Area code 204
Text case: Upper/Mix		
Last name	Select a desired text Last name M -	Next Unit numbers Default Label size
	case for last names	'Regular' 10157 © 3 col x 10 row (2 5/8 x 1)
	entered into your database. You can select	Visitors 5000 C 2 col x 7 row (4 x 1 1/3)
	Mix].	Contribute 7000 C 2 col x 5 row (4 x 2)
City	Select a desired text Titu	Default Service Time 3:00 am
	case for cities entered	
	into your database. You can select from Mix	
	or oppercase [we recommend wix].	Figure 33
		System defaults: Other defaults
Defaults		
Area code	The default Area code which the majority of	your membership would fall Area code 204
	into.	,
City	The default City which the majority of your	membership would can butinning
,	live in.	
_		
Prov	The default Province which the majority of y	your membership would live in. Prov MB
Novt Unit numbers	A unique "Heit sumber" is assigned to each	family in your church
These Office functions	A unique offit number is assigned to each	ranniy ni your church.
'Regular'	What is the next unit number that should	be assigned to 'regular'-type 'Regular' 10157
	families added to your database?	
Visitors	What is the next unit number that should b	e assigned to visitors that are very From
V 151(015	added to your database?	Visitors DUU
Contribute	What is th next unit number that should be a	ssigned to a contribution-only Carbineter 7000
Gommbute	'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?	r source as you are not often
Default service time	What time do <i>most</i> of your church services be	egin? Default Service Time 10:20am

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

Person fields

Defaults Fields

Two 'option' fields can be renamed. 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.

Figure 43 System defaults: Default 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).

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.

 Family fields

 Option 1
 Option 1

 Option 2
 Option 2

Person fields		
PIN/Roll#	Mbr#	
Membership	Membership	
Baptism	Baptism	
Confirmation	Confirmation	
Communion	Communion	
Dedication	Dedication	
Removal	Removal	

Church Other defaults Default Fields	Receipting Logo Images Modules
Family fields	Person fields PIN/Roll# Mbr#
Option 2 Option 2	Membership Membership
	Baptism Baptism
Service attendance fields 0th1 0ther 1 0th2 0th2 0th3 0th3 0th4 0th4 0th5 0th5	Confirmation Confirmation Communion Communion Dedication Dedication Removal Removal
Hymnal Hymnal BB T Denomination Catholic T	Givings PAR PAR

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 rename these *five* 'other' fields to suit your needs.

Service attendance fields		
Oth1	Other 1	
Oth2	Oth2	
Oth3	Oth3	
Oth4	Oth4	
Oth5	Oth5	

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.

-Hymnal	
Hymnal	HWC -
Denomination	Lutheran 🗾

Givings

PAR PAR

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:	Church Other defaults Oefault Fields Beceipting Logo Images Modules
	ReceiptingQuarterly statement	Next Receipt# 1 RctNo prefix Quarterly statement
	Quarterly statements are <i>not</i> numbered, whereas receipts are.	Size 11" Type YTD details Show pledges? Per: signature name Brian Chappell title Envelope Secretary constact place # 112.4657
Receipting		Stewardship/Pledges
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.	Per: signature name title Stewardship Chairman contact phone # 987-6543
RctNo prefix	Do you want a prefix character to be printed in front of the receipt number?	Figure 49 System defaults: Receipting
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).

Туре	YTD details	-

11"

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

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

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

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.

Per: signature name	Brian Chappell
title	Envelope Secretary
contact phone #	123-4567

Stewardship/Pledges

Per: signature name	Stewardship/pledge statement forms	Per: signature name	
	have a notation printed at the end to identify the contact person within	title	Stewardship Chairman
	your church that maintains this type	contact phone #	987-6543
	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 sections:	two <u>Church</u> <u>Oth</u> Full pat Program the Switchbo	er defaults Default Eields Receipting Logo Images Modules h and image filename con C:\ce\ce.ico ard logo C:\ce\cemain.hmp
	program that are printed on var reports	iOUS Receipt/ Report h Receipt s	env logo [C:\ce\cemain.bmp eader logo [C:\ce\cemain.bmp ignature
	 paths to folders used to store images taken of various items These <i>system</i> defaults can be overridder individual users via the Users Look-up ta section. This may be necessary if you running the program on a network and u have different paths to the network server. 	your Default Family Perso a by Equip bles Librar are Prope Isers Signa file	folders (path) for images c:\ce\family\ n c:\ce\person\ ment c:\ce\equipment\ or media c:\ce\library\ ct:\ce\property\ ge ct:\ce\signage\
		Figure 55	
Program icon	Include the filename and the full path to program icon image.	System do the	efaults: Logo Images
	This image (ce.ico) is supplied by Admi	nware.	
Switchboard logo	Include the filename and the full pa Switchboard.	th to the prog	gram logo that is displayed on the Main
	This image (cemain.bmp) is supplied by that you wish to display.	Adminware bu	t <i>you</i> can create and identify your own logo
Receipt/env logo	Include the filename and the full path quarterly statements, and envelopes.	to the logo ye	ou would like to have printed on receipts,
Report header logo	Include the filename and the full path reports.	to the logo yo	u would like to have p r inted at the top of
Receipt signature	Include the filename and the full path to receipts.	o the "signature	e" image you would like to have printed on
Folders	Several modules in the program allow	Default folders	: (path) for images
	that you have taken (or received from	Family	c:\ce\family\
	others within your church).	Person	c:\ce\person\
	These six defaults are used to identify	Equipment	c:\ce\equipment\
	the default folder which each type of	Library media	c:\ce\library\
	with a means of organizing your	Property	c:\ce\property\
	images.	Signage	c:\ce\signage\

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).

0	<u>hurch [O</u> ther defaults] Default <u>F</u> iel	ds <u>R</u>	eceipting 🛛 Logo Images	Modules
	Modules			
	Use Attendance?	◄		
	Use Ministry module?	☑	Which month is start	9 •
	Use Stewardship/Pledges?	☑	or ministry year ?	
	Use Contribution Sub-accounts?	☑		
	Use Events/Facilities module?			
	Use Library module?			
	Use Signage module?	◄		
	Use Accounting module?			
			J	

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 **Loo<u>k</u>-up Tables** button from the Main Switchboard; then select the User 'radio button' on the Codes(1) tab.

A Church Executive(tm) - [Co	oded Look-up Tables]		- 🗆 ×
🕄 File Edit View Insert For	rmat <u>R</u> ecords <u>T</u> ools <u>W</u> i	ndow <u>H</u> elp	- 리 ×
🔟 • X 🖻 💼 🗠 🏄	, ZI 🖗 🔁 🔽 🚧	N < > > > > > > > > > > > > > > > > > >	
Codes (1) Codes (2) Person (Codes	Coded Look-up Tables Close	
		User defaults	
General C General C C Area code C C City C Proyince R C Country C Family C Status C C Title C C District C Contacts D C Contacts D C Contact method C Ministry C C Categories C G Gift/Talent/Hobby/Inter	Iasses Term Type Hymnals Hymn topics thurch Service Service type/theme Liturgical positions Defaults System User Denominations rest Churches S Contribution Codes	User Identities User Id DEMD User Id DEMD User name Demo Password **** Current Year 2004 * E-mail/Outlook version 38 * Printer available? Laser * Width N/A * Envelope printing? Envelope #10 * Internet Browser Program Path: eg: C:\Program Files\Internet Explorer\Iexplore	
Form View			
Figure EQ Lloor defaults	farma		///

Figure 58 User defaults form

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

User Contributions Logo Images

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).	User I DEMO User I DEMO User name Demo
User id	This cannot be modified by the user.	E-mail/Outlook version 98
User name	What is the full name of this user. User name Demo	Printer available? Laser Vidth N/A Envelope printing? Envelope #10 Internet Browser Program Path:
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.	eg: C:\Program Files\Internet Explorer\Iexplore Figure 60 User defaults: User
Current Year	This drop-down list identifies the default ye contribution and ministry purposes. It can b users, depending on the needs of each user.	ar <i>this user</i> is using for e different from other
Email/Outlook version	A drop-down list that identifies the vers Outlook that this specific user has installed or	ion of Microsoft n <i>their</i> computer.
Printer available?	What is the default printer setting (in Microsof user?	ft Windows) for this Printer available? Laser
Width	What is the width of the printer used by this	user? Width N/A
Envelope printing?	If this user prints envelopes, how are they poprinter?	esitioned in the Envelope printing? Envelope #10 -
Internet Browser Program Path:	What is the full path to the internet browser Microsoft Internet Explorer, Netscape, or so	program used by this user? This could point to the me other browser program.

Contributions

Logo Images

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.

Any values recorded here override the

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

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

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

system defaults (see page 14).

the System defaults only.

folder on the network file server.

<u>U</u> ser	Contributions Logo Images
	Default Service
	Date 13-Jun-04 Sun
	Service 1

Figure 69 User defaults: Contributions

User Contributi	ons Logo Images
Full path and	l image filename
Program icon	
Switchboard lo	go
Receipt/env lo	go
Report header	logo
Receipt signatu	ire
Default folde	ers (path) for images
Family	
Person	
Equipment	
Library med	a
Property	
Signage	
	Browse

Figure 70 User defaults: Logo Images

Look-Up Tables

Why?

Look-up Tables

Look-up tables are an essential component of any relational database system, such as *The Church Executive*TM 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*TM 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.

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Form View

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:

③ select the table to view. You may need to switch between one of the three-tabbed control.

Codes (1) Codes (2) Person Codes

- ② the right side of the screen will change to provide the current set of values for the selected look-up table.
- ③ add a new entry.

To *delete* an entry:

- ① 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.
- ③ 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!





Look-Up Tables: Codes (2)

Codes (<u>1</u>) Codes (<u>2</u>) <u>F</u>	erson Codes
Table Fees O Payment type O Category	Accounting C Chart of Accounts C Accounting defaults C Accounting years
Staff © Position	Events/Facilities
Property C Category Pastor C Function C Location C Visit type	 Facility type Library Library type Media type Collections Series



Figure 77 Look-Up Tables: <u>P</u>erson Codes

Churches

C<u>h</u>urches

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.

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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.

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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

Church <u>M</u>essages

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

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Church Messages

Contribution Codes

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".

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Figure 85 Contribution Codes