Advanced Membership
Training Manual

Advanced Membership

Advanced Membership goes above and beyond the normal everyday things you will do with the software.

In this manual you will learn about adding photos to your database, making advanced reports, and researching statistics. In addition, you will see some tools and utilities that help you along the way.

Introduction to Membership Module

The Membership module allows you to store a variety of information about the members of your church. Common tasks include adding households and members, editing contact and demographic information, printing mailing labels, and creating church directories.

1. Household Records
2. Add a Household
3. Search for Households or People
4. Person Records
5. Add a Person
6. Activities / Skills / Training
7. Visits
8. Church Register
9. Subgroups
10. Reports
11. Mailing Labels
12. Send Email
13. To Do...
14. Scheduler—Calendar of Events
15. Household Tree
16. Church Dashboard
17. I Want To . . .

"I Want To . . ." Screen

This window is designed to be a quick shortcut to some of the more popular tasks within the module you are currently in. If you would like to turn off the "I Want To . . ." Screen, you can do so by clicking Desktop on the file menu and making sure "Show the 'I Want To' helper on start up" box is unchecked.
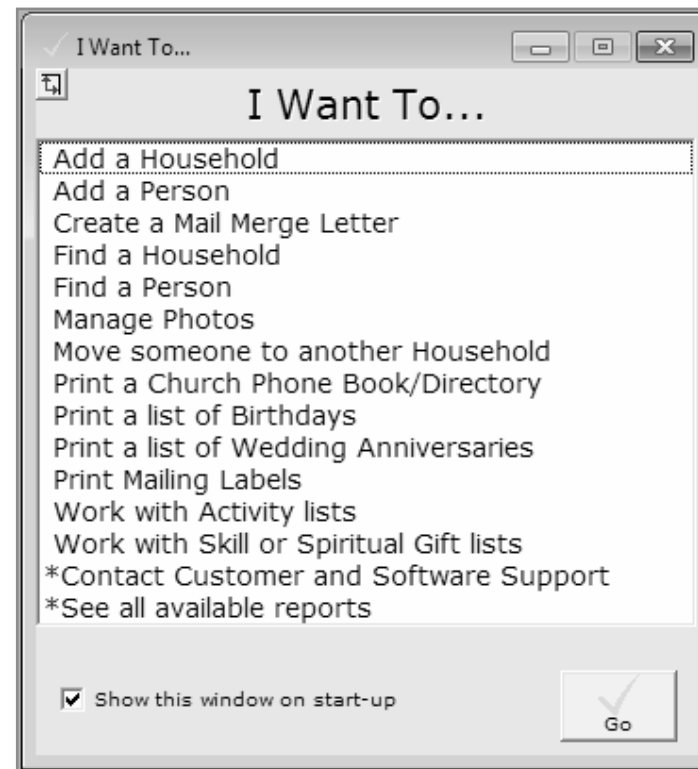
Church Dashboard

The Membership tab on the Church Dashboard contains a quick snapshot of your membership data. This includes information such as how many members have been received this year and how many total members you have.

There are two graphs on this page, one that shows members received/removed or visitors added, and one that shows your member activity for the past three months.

If you look at the bottom of the dashboard, you will find some statistical information for your database. This includes a current count of members and an age breakdown of your congregation, as well as some helpful insights into your Household and People records.

1. To view the dashboard, go to Reports and click Dashboard.

2. You can copy these graphs to another program by clicking the Copy to Clipboard button.

3. On the Members Received graph you can view the total Received, Removed, or Visitors Added to your congregations roles over the last 12 Months.

4. On the Current Members Activity graph you can view activity or inactity over different time frames like one month, six months, ect.

5. The info and question mark buttons will give you the current criteria of the displayed statistics.

6. To update the statistics on the dashboard to reflect a change made in the database you can close and reopen the dashboard or you can click the Refresh button at the bottom of the window.
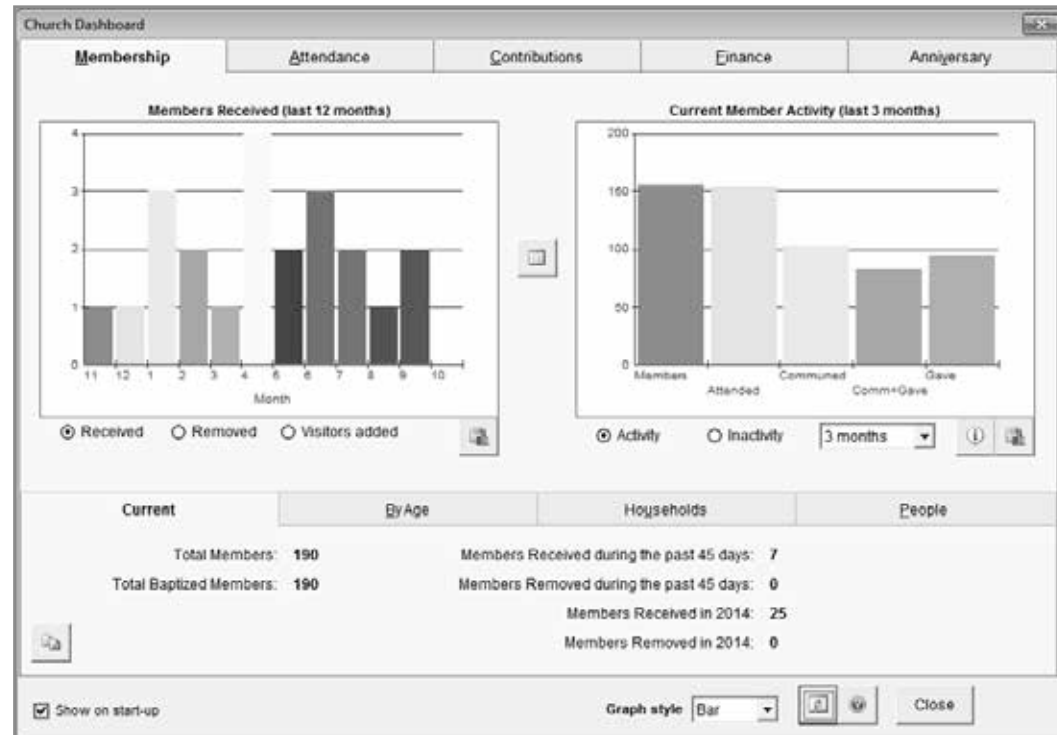
Tree by Household

Similar to the way the dashboard can be used to show your membership activity at a glance, the tree is also available to show your member information at a glance.

There are 6 trees available from the "By Household" view.

» **Member Households**—Displays just the households that have at least one non-removed member.

» **Non-Member Households**—Displays just the households that have at least one non-member.

» **All Households**—This is the original tree with no member/non-member filtering applied.

» **Only Members**—Displays only non-removed members within each household.

» **Only Non-Members**—Displays only non-members within each household.

» **Business, Church, Organization, School**—It shows all Household records with one of those four household types assigned to it.

1. You can access this tree by clicking Tree in the file menu and then selecting "By Household."

2. To change the tree filters, click the dropdown box and select the desired view.

3. When a Node is displayed with a + sign, it can be opened by clicking on it to display the Branch. Branches can be clicked on to access that individual's record.

4. In order to access the Household record, you can select it in the tree and then click the Show Household button.

5. The Refresh button is used to update any changes you have made to membership since entering the module.

By Household

Member Households

Show Household

- Abbott (4)
- Baxter (3)
- Belton (4)
- Benedict (1)
- Billings (1)
- Brown (1)
- Callaway (4)
- Carroll (1)
- Carter (4)
- Chung (3)
- Clayton (5)
- Collins (4)
- Cook (4)
- Culbertson (3)
- Dean (2)
- Dowling (1)
- Enriquez (1)
- Fernandez (3)
- Freeman (1)
- Gibson (4)
- Gomez (3)
- Graham (2)
- Gregory (3)
- Hall (4)
- Hampton (3)
- Haywood (1)
- Henry (4)
- Hobson (2)
- Holdren (2)
- Huffman (3)
- Hung (4)
- Hunter (4)
- Kessler (2)
- Krause (4)
- Lane (2)

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Photos

Shepherd's Staff contains some tools that make it easy to attach photos to your households and people.

Including photos in your database not only helps with person and household recognition inside the software, but also gives you the ability to print a photo directory easily.

Photo Editor

Every person and household record in Shepherd's Staff can have a photo attached to it. You can attach these photos by using the Photo Editor.

You can use images from any of these three sources:

» **File**—Choose a file that is stored on your computer.

» **Paste**—Use an image you have copied to your Windows clipboard from the internet or another source.

» **Camera**—Move an image over directly from your camera.

Once you have an image selected, you can crop it by moving a box around inside the original image. You can do this by clicking inside the original image square. When you do that, you will see a box appear, and by moving that box around, you will change the image that shows inside the large and small squares. Then you can choose whether the original, large, or small square image works the best for this record.

1. Access the Photo Editor by editing a person or household record. Click in the upper right hand corner of the record. This brings up the Photo Editor.

2. Start by deciding if the image is coming from a file, the Windows clipboard, or from a camera. Click the choice you want.

3. Choose the image you want from the window that comes up (paste will automatically insert the image).

4. Now that the image is in the original square we can work on fine tuning the image size. Move the box around until the image looks good to you.

5. You will only use one of these images for this record, so choose the one you like best by picking original, large, or small in the Default Image box.

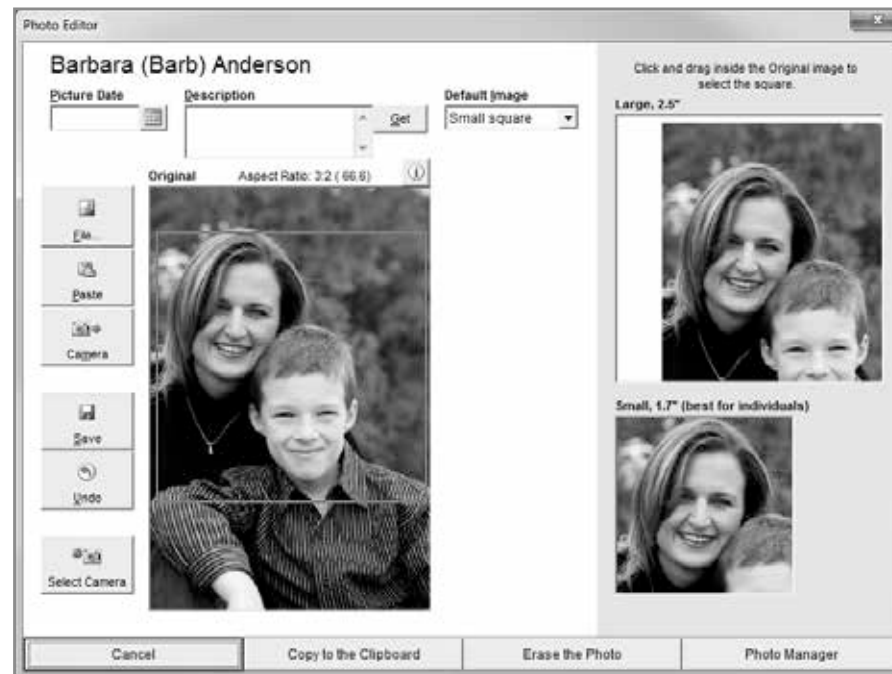6. Once your image is set, click the Save button to save the image.

Photo Manager

Now that we have seen how to add a photo to a single record using the Photo Editor, we are going to take a look at adding several photos at one time. The tool we are going to use to complete this is the Photo Manager.

When this tool comes up, you will notice that it looks the same as Photo Editor. The difference now is that we have the list of households and people on the left hand side, which help us quickly change between each records. You can even filter for members only, or only show people without a photo. This will help with making sure that all member households have a image for when you print out the photo directory.

It's recommended that you work on household photos first, as the program will automatically give that household photo as an option on the person record (this does work the other way, though).

1. Access the Photo Manager by going into Membership and clicking Tools in the file menu. Choose "Photo Manager."

2. Highlight the household record you want to work with and add an image (Photo Editor steps).

3. Once the household photo image is set, click on the People button next to households to access the people record images.

4. You can choose a new image for the person or use a small section of the household image. Keep in mind that even though the household photo shows automatically on the person record, you still have to click Save on the person record to attach the image.

5. If the record has a photo there will be a check mark in the box under the "Photo?" column for that record.

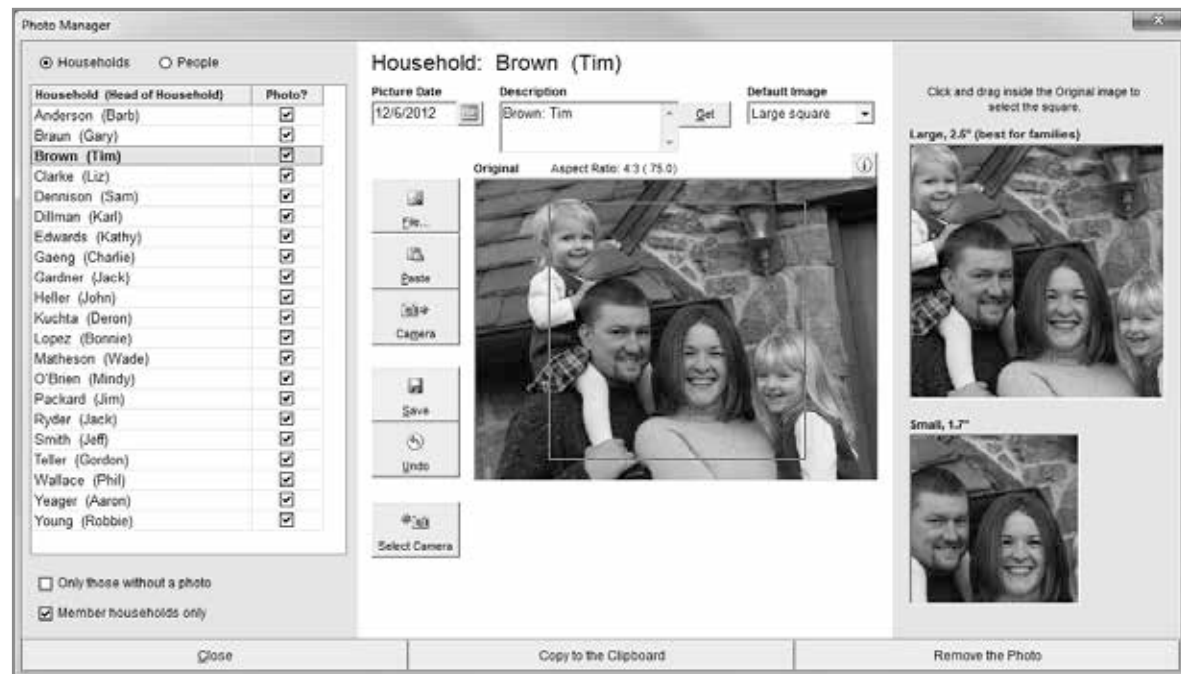6. Once you are done adding images, simply click Close to exit the window.

Photo Directory

The Photo Directory for Shepherd's Staff is located within the Report Writer. In fact, because of this you can turn any saved Membership report you have into a report with pictures attached.

1. This feature may be activated on the Format and Layout tab of the Report Writer. You can choose a "Photo Directory by Person" or a "Photo Directory by Household."

2. For the "by Person" option, you have the ability to choose the square size for your images.

» **1-square**—This prints a square image using the default image selected on each person's record, with the person's data to the right of the picture. For example, if you have the small square selected for a given person, that square is what prints here. However, if you have the original image selected as the default, it will resize (skew) that image to fit into the square.

» **2-square**—Larger variation of the 1-square.

» **2-variable**—Version of 2-square that prints the original image, regardless of the default selected on the Person Record. This means it handles portrait, landscape, and square—all three. The "variable" formats handle 4:3 aspect ratio (both portrait and

landscape), 3:2 aspect ratio (both portrait and landscape), and 1:1 aspect ratio (square). For landscape images, the photo is cropped on the left and on the right (i.e. the center is taken).

» **3-default square**—Larger variation of 2-square, but with all text below the photo.

» **3-variable**—Larger version of 2-variable, but with all text below the photo.

» **3-large square**—Works similar to 3-default square, but ONLY uses the larger of the two squares, regardless of the default image selected. The reason for using this is that in many cases the smaller square may get stretched too much (e.g., look grainy or distorted).

3. Your best method may be a trial and error on the different sizes until you find the one you like the best.

4. Click Preview to view your photo directory.

Your Church
Photo Directory

Anderson, Barbara
7540 Lakeland Ave NE
Lakewood, MN 55678
612-222-4244
banderson@yahoo.com

Braun, Gary
412 N Main S
Apt H
Lakewood, MN 55213
612-454-8561
garybraun@gmail.com

Brown, Timothy
234 Tallgrass Rd.
Lakewood, MN 55678
212-555-1234

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Reports

The reports in Advanced Membership aren't as frequently used as the ones in Intro to Membership, but are still very helpful when the need for their use arises.

The section will walk you through each of these reports, featuring a step-by-step guide on using each one.

Report Conventions

One of the most popular features of Shepherd's Staff is the large collection of pre-made reports. There are several similar features you will find in the majority of Shepherd's Staff reports.

One such feature is the library of saved reports. This is an area where the users can save reports that can be used again. If you like to run a report using certain settings, you can choose to save those settings as a "report" so that the next time you need it you can simply click on the saved report to fill in the settings automatically.

Keep in mind that these saved reports are optional, and at any time you can change the options and print the report. In this way you could make a template that maybe saves one or two options like subgroup or date range and then you can change some of the other options based on the month or data needed.

Another feature found in the majority of reports is the "Who" section. In the "Who" section you have the ability to tell this report what subset of records it should be run on. The two options that are almost always available are "All People" and "Subgroup." The "All People" option will run this for EVERY record (including removed people) found in the database.

"Subgroup" is an option that gives a report a great deal of flexibility. You can set up a subgroup based on certain criteria and then run this report for only that subset of people. This is very handy when you need to see information on just a small collection of people in the database. Each report will come with its own selections under "Who" and can also have filters that limit information, such as "no removed people" or "members only."

Many reports also feature sections such as:

» **"Address"**—Asks which address to print, Primary or the active Alternate. If the Alternate Address is chosen although a record doesn't have an Alternate, the Primary will print anyway.

» **"When"**—Limits the report to a period of time.

» **"What"**—Allows the selection of particular content for that report.

» **"Include"**—Gives the option to add extra fields or data to the report.

Creating a Library Report

On this page you can see the steps for creating a report in the library of saved reports.

1. To access a module's reports, click on Reports at the top of the page in the file menu, or you can access it through the toolbar button.

2. The process is started by clicking on the New Report button at the top of the selected report window.

3. After that, you can type in a name and description of that report. If there are many users making reports, it may be a good idea to include the date and creator's name in the description. This makes database cleanup easier in the future.

4. At this point you can go through the settings and select the options you want to see on the report. The saved report will even remember the font or subgroup you used on this particular report. Once the settings are selected, you can click Save at the top of the page. If at any time you no longer need a report, it can be deleted by selecting the report and clicking the Delete button.

5. To change a font, use the font dropdown menu, then choose the desired font and click it. After all changes are made, click on Save to save the report.