

SHEPHERD'S STAFF 2015

This document lists improvements to Shepherd's Staff that are found only in the 2015 version release (such as our new Ministry Task Manager), as well as those that were made available early to customers in our Shepherd's Staff 2014 Feature Pack. Those improvements found in the 2014 Feature Pack are indicated by an asterisk (*).

FEATURES

GENERAL

- » The major feature in Shepherd's Staff 2015 is our new Ministry Task Manager, which offers automated, dynamic task generation based on scheduled templates or data actions. In combination with a user-specific To-Do List, you can now track the work activity in your church to make sure everything is completed on time. The task manager lets you add detailed steps to perform each task, giving volunteers the guidance they need while at the same time documenting your church processes for future reference.
- » Speed improvement: Exporting large grids of data to a spreadsheet (e.g. Excel) is dramatically faster.*
- » We changed how we store user-specific settings (the last position of forms, screen preferences, etc.) to reduce network traffic (which increases speed, and helps protect the database from accidental corruption).*

MAIN MENU

- » The Select a Church window now shows statistics for the currently active database.*

MEMBERSHIP

- » The "household" version of the Church Directory has been overhauled to allow the following:
 - » Both cell and work phones can be printed at the same time.
 - » Cell and work phone numbers can be printed for everyone in a household (not just the head of household and spouse).
 - » Both household and personal e-mail can be included for the head of household and spouse.
 - » Personal and work e-mail addresses can be included for everyone in a household (and not just the head of household and spouse).

- » Both primary and the "most-recent" alternate address can be printed at the same time.
- » Layout updated to allow addresses to print on a single line to conserve space.
- » Addresses are "home country" sensitive, specifically if the church is located in Canada, it no longer prints "Canada" for local addresses, and instead prints "United States" (or whatever abbreviation the church uses) for U.S.A. addresses.
- » You can now choose to print the household name in all caps, for emphasis.

- » The "person" and "e-mail by person" versions of the Church Directory now allow both cell and work phones to be printed, instead of just one or the other.
- » The "household" version of the Church Directory can now include the household photo!
- » The Church Register certificate report has a new button titled "Get from Register" that lets you override the text on the certificate with the notes/comments from the Church Register.
- » On the Membership tab of the Dashboard you can now set the filters while viewing the underlying data, without having to first switch back to the graph.
- » On the Membership tab of the Dashboard there is a new option letting you view membership Inactivity.
- » On the Membership tab of the Dashboard you can select how many months of member activity (or inactivity) to see: 1, 2, 3, 6, 9, 12, or 24.
- » On the Household and Person records, if you select an item in a choice list using ENTER or the mouse, it now automatically jumps to the next data entry field on the screen, saving you a keystroke/click.
- » On the Person record, if you mark someone as received by Baptism or Confirmation, it now checks the appropriate box to the right (Baptized or Confirmed), saving you a click. If adding a new person who is received by Baptism or Confirmation, then the associated date is also filled in, using the date the person was received.
- » Mailing Labels (previewable): There is a new item under Contents titled "Person – (your text) First/Last". It allows you to enter your own prefix in front of person names on the labels, such as "Parents Of".
- » There is a new version of the household photo directory (in the Report Writer) that prints the large square photo that appears on the Household Record.

- » The Church Directory export now includes both the primary and most-recently-used household alternate addresses (to account for “snowbirds” and other seasonal people).*
- » The address copy feature now recognizes the country the church is in, so that for churches in Canada it does not include “Canada” for in-country addresses, but does include “United States” for U.S. addresses.*
- » The address copy feature now includes the “+4” of the U.S. zip code, instead of just the first five digits.*
- » The Export Person / Household utility has a new filter to limit the export to only removed persons, or to households with at least one removed person.*
- » The global search feature has been improved to allow you to search for names in “Last, First” format. (We also added a “help” button to guide users on how the improved global search works.)*
- » Speed improvement: When switching between households records using the tree or the global search, you no longer have to close the prior displayed household. (In other words, you no longer get the “you are currently working with” message when you are just viewing households.)*
- » The Household Record now shows the date when the household was added to the database.*
- » The term “Occupant” can now be printed on previewable Mailing Labels.*
- » The Person Record can now include the person’s photo.*
- » Speed improvement: We reduced the number of database calls (network traffic) when viewing and switching between Person Records.*
- » The Person Record report can now be printed for those in a single household.*
- » Efficiency improvement: To direct the customer to the “best tool for the job”, we’ve removed the Find Household and Find Person toolbar buttons; the focus is now on the global search feature (which has been improved). Note: The old Find Household and Find Person searches are still available from under the Records menu.*
- » The Tree has a new search button which launches the global search, and lets you quickly jump to a person in the Tree, or to a household (providing the Tree is currently displaying household names).*
- » The Tree now remembers its style/grouping between uses, so you don’t have to reselect it each time.*
- » The Tree has two new icons: a green diamond with a yellow bar for Members marked “Inactive”, and a green diamond with a red bar for Members who have been removed.*

- » When editing a Static subgroup, the value of "Return to Search" is now remembered between uses.*

ATTENDANCE

- » Attendance Year Summary grid: The event count for a given Attendance Type is moved, and now follows the total attendance for that type, for improved readability. *
- » Batch Entry: There is a new checkbox that causes the attendance types revert to their defaults after adding a person. For example, let's say you are entering attendance for an event that has both Worship and Communion. The first 50 people communed, but the 51st person did not. You uncheck the Communion box, add that person, and then continue with the next 40 people, who also communed. Unfortunately, you forgot to recheck the Communion box, and now you have to manually fix those 40 people. This new feature prevents this problem from happening.*
- » Enrollees Report: The report can now be grouped by Ministry Group or Person Assigned.*
- » Events grid: New "Yearly Statistics" tab that displays attendance statistics by event, by year.*
- » Events grid: Powerful new "By Person by Occurrence" tab for analyzing event attendance patterns by person from 6 to 106 occurrences into the past.*
- » Events grid: Powerful new "By Person by Week" tab for analyzing attendance patterns by person to a given type (e.g. Worship, Communion, Sunday School), from 6 to 106 weeks into the past. *

CONTRIBUTIONS

- » You can now choose to apply a gift-in-kind towards the fulfillment of a pledge. Per IRS regulations, the amount the church assigns the gift-in-kind is unofficial (i.e. not for contributor tax reporting purposes), and does not appear on the contribution statement. However, it does allow you to credit a contributor's gift as being towards a pledge.
- » A new column was added to the Pledges grid titled "Total Diff." It displays the total given towards a pledge including any gift-in-kind's that were assigned using the new "assign gift-in-kind to a pledge" feature, described above.
- » Batch Entry: When working in a batch, you can now export the grid contents to a spreadsheet for reference.*
- » Contributions / Pledge Comparison report: There is a new option to suppress contributor names on the report, for privacy.*

- » Envelope Box Labels can now print the contributor's "custom name".*
- » Statements (previewable) now include a giving-by-fund summary at the top of each statement.*
- » We have a new, direct import from the Vanco e-Giving web service.*
- » There is a new utility that allows you to swap the offerings between two envelopes (for cases where there wrong envelope was accidentally used to post offerings).*

FINANCE

- » Preferred vendor accounts are now automatically updated when you add a check for a vendor, without having to manually add them via the vendor record.
- » When adding a check there is a new "Get last check" button that defaults the line items to the ones on the last check written to the selected vendor.
- » You can now project "equal monthly amount" budgets using a negative total amount.
- » When you copy a check you can now click Add Again to enter another new check without having to first save, go back the Check Register grid, and click Add.
- » When viewing/editing an income or dedicated account, the window now includes any associated Contributions fund.
- » Accounts: We've streamlined how you add and rename Major and Minor groups, Responsibility Codes, and Church Body Codes.*
- » There is a new Chart of Accounts tree that provides a visual representation of how accounts roll up into Minor and Major groups, and account types. This major new feature includes the current balance, historical activity, and a graph for any point in the tree (account level, minor group, major group, or account type). It also has an on-screen Statement of Income & Expense and Balance Sheet for the currently active fund.*
- » The Accounts grid now has a Delete button, letting you remove an inactive account that has no activity without having to run the Clean-up utility.*
- » Accounts grid: Accounts can now be added without first switching to an account type.*
- » Check and Deposit Register reports: You can now print for a different fund without having to switch the currently active fund.*

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- » The Church Body report can now be printed for a historical year.*
- » The Church Body report can now be printed for a single month.*
- » Payroll Import: The import settings can now be changed at any time without having to first import a file.*
- » Payroll Import: The information on the Setup window can now be exported to a spreadsheet, for reference.*
- » Payroll Import: New Delete All button on the Setup window to easily clear the contents of the account and vendor grids.*
- » Payroll Import: Now supports importing data from the Paychex payroll program.*
- » The Journal Register report now returns results from the specified fund, rather than from across all funds.*
- » Speed improvement: We've streamlined the process for switching between Finance Funds so that it automatically closes necessary windows.*
- » Speed improvement: When viewing checks, deposits, and journal entries from their respective grids, you can now switch to the next one without first closing the prior record. (In other words, you no longer get the "you are currently working with" message when you are just viewing transactions.)*
- » Speed improvement: When viewing vendors from the Vendors grid, you can now switch to the next one without first closing the prior record. (In other words, you no longer get the "you are currently working with" message when you are just viewing vendors.)*

SCHEDULER

- » When scheduling an event you can now add a new room/location right at that time, without having to first close the event and go to the Rooms grid.
- » Added Ash Wednesday to the calendar holidays.*
- » The Calendar of Events can now include Wedding Anniversaries.*
- » When adding a Contact from the Membership module you can now search for a name in the list instead of scrolling.*
- » When editing an existing Event it now retains the time range when you pick a different date.*

FIXES

- » Membership, Church Register certificate report: Fixed some font and alignment problems, and also fixed a problem with names in "last, first" format not getting flipped on the certificate to "first last".
- » Membership, 2-column Church Directory: Fixed problem with addresses getting cut off for large families.
- » Membership, Church Phone Book: Fixed sorting problem with households with the same last name not sub-sorting by the first name of the head of household.
- » Membership, Parents Of report: If printing one label per household with multiple child names on the first label line, and all of the children in the household have the same last name, then the last name now prints on the label.
- » Contributions, e-mailing statements: Now any user with rights to send e-mail can create e-mail messages in the message library, and not just the SYSADMIN.
- » Contributions, offering batch entry: Fixed random occurrence of Error 5 while adding offerings to a batch.
- » Finance, check entry, Add Again: Fixed problem with Add Again where, after tabbing to the first line item it could jump down to the second line item.
- » Finance, 12-month versions of the Statement of Income and Expense: Correct problem with the fund name not appearing in the report heading.
- » Attendance, Posting a batch: Fixed problem with visitor counts not always posting correctly to the Event Summary. *
- » Contributions, Fund Statement Analysis report: The report now correctly sorts down the page, instead of left-to-right across the columns. *
- » Contributions, Contributor List report: Fixed problem with the column headings being switched when sorting by the next-year number. *
- » Contributions, Contributor List report: Fixed problem that interfered with filtering the results using Next Year envelope numbers. *
- » Contributions, Daily Giving report: Removed duplicate envelope number printing in the statement heading. *
- » Contributions, Dashboard: Switching the displayed fund did not always refresh the grid. *

- » Contributions, Daily Fund Totals: Fixed problem with data loading slowly.*
- » Contributions, reprinting batch reports: Fixed problem with “entered by” and “posted by” not appearing on the reprint.*
- » Contributions, Statements (previewable): Fixed problem that could cause two different envelopes/contributors to appear on the same statement.*
- » Finance, Account Balances report: Fixed problem that could cause the wrong fund name appearing in the report heading.*
- » Finance, adding Checks/Deposits/Journal Entries: Fixed problem where, after tabbing to the first line item, it would not respond to typing until you clicked in the row.*
- » Finance, Bank Account Reconciliation: Fixed problem that prevented the vendor name from showing for journal entries that were marked as an EFT for a vendor.*
- » Finance, Payroll Import Setup: Now correctly shows the last selected Bank Account.*
- » Finance, Recurrent Transactions: Fixed problem that prevented you from deleting a recurrent transaction.*
- » Dashboard: Fixed problem with “0” showing for the attendance of contribution week number if there was no data for that week.*
- » Membership, Household and Person addresses: Fixed problem with Canadian postal codes not copying when using the Copy button.*
- » Membership, Church Directory: Fixed a problem with removed members being still flagged as a member on the Church Directory.*
- » Membership, Household and People grids: Fixed problem with, when the last row you viewed was towards the end of the grid, the next time you opened the grid it would only show one or a few rows at first, until you scrolled.*
- » Membership, Households by Map Block: Fixed problem with the report not grouping correctly by Canadian postal code.*
- » Membership, PC(USA) annual report: Fixed problem with the Teachers/Officers calculation.*
- » Membership, WELS annual report: Fixed problem with line 19 including removed children.*

- » Membership, Photo Directory: Fixed problem with the photo description not wrapping to a second line (and instead getting cut off).*
- » Membership, map button: When trying to view a map of an address, some computer systems are missing the default browser setting; in this case, Shepherd Staff now defaults to Internet Explorer if no default browser is found.*
- » Main Menu, Create a Church: Fixed problem with an extra ".mdb" being included in the new database's filename.*
- » Subgroups: Redesigned how subgroups are created to eliminate errors messages.*
- » General: There was a problem that prevented the custom denominational terms from being installed in the United Methodist edition. That has been corrected, and United Methodist customers can re-apply the missing terms by going to Settings under the Main Menu Utilities and reselecting the "United Methodist" edition.*

If you have any questions about any of these features or fixes, please contact Concordia Technology Solutions software support at support@cts.cph.org or 800.346.6120.