

Membership Co-ordinator Upgrade – Jan 2007

Many thanks to all those who responded with suggestions for further improving Membership Co-ordinator. Most of the requests focussed on directory reports, particularly group directories, requiring them to be more flexible, including information on the leaders, selecting more than one group, limiting the output by setting a filter etc.. We have incorporated as many ideas as we can given the time constraints, and these are described in detail below.

Directory, label and email assistant (Reports menu)

A brand new form has been designed to cater for the printing and emailing of people, groups, and skills directories and labels. It has been designed as an assistant (sometimes called a 'wizard'), to guide you through the process step by step.

This form will produce directories and lists of people arranged by household.

This form will also produce labels for people, people in particular groups or with particular skills/attributes, or household labels for the people selected.

First choose whether you want to limit the directory or labels by selecting one of the options below.

Do not limit the results by groups or skills
 Limit the result to people within particular groups
 Limit the result to people with particular skills/attributes

Click on Next to choose whether you wish to set a filter to limit the people included in the report or labels.

Previous Next

Included in this form is a full filter system so you can for example find all the married people within your organisation.

Name	Type
AGE	N
BIRTHDAY	D
BIRTHYEAR	I
CFKHOUSEHOLD	C
CITY	C
CODES	C
CONTACTS	M
CORP1	C
CORP2	C
COUNTRY	C
COUNTRY	C

AGE

equals or begins with (=)
 is not equal to (<=>)
 is less than (<)
 is greater than (>)
 is less than or equal to (<=)
 is greater than or equal to (>=)
 contains (\$)
 does not contain (! \$)
 is empty
 is not empty

Add filter line

OR

Delete single line

Clear

Move up

Move down

Current filter : Cancel filter Set filter

Filter description : You can store the current filter settings then use / edit them from the 'Stored filters' page. Store filter

Previous Next

In addition to the filter, you can further limit the output file to include only those people within particular groups or who possess particular skills/attributes. Using a church scenario you can for example find all those who are married, live in a particular postcode area and attend housegroups. You can select or deselect whichever groups/skills you wish to be included in the final output. For example you can opt to select all those groups with the word 'housegroup' in the description.

Select the group(s) that you wish to include in your report by placing a tick in the Include column.
You can use the Include all and Exclude all buttons to speed up the selection process.

Include	Select the required group	Description
<input checked="" type="checkbox"/>	BAPTISED	Baptised at St Cuthbert's
<input type="checkbox"/>	BAPTISM	Baptism Contact
<input checked="" type="checkbox"/>	ELECTCUTHBERT	Electoral Roll of St Cuthbert's
<input type="checkbox"/>	ELECTJOHN	Electoral roll of St John
<input type="checkbox"/>	FINANCE	Finance committee
<input type="checkbox"/>	FUNERAL	Funeral Contact
<input type="checkbox"/>	NEW	Not On Electoral Roll Yet
<input checked="" type="checkbox"/>	PCCCUTHBERT	PCC Member of St Cuthbert's
<input type="checkbox"/>	SIDESPERSION	Sidesperson
<input checked="" type="checkbox"/>	WEDDING	Wedding Held In St Cuthbert's

Tick those entries that have the following text as part of the description.

An extra report design has been included which will start each group on a new sheet of paper and display the contact details of the group leader(s) at the top of each separate group report. This is ideal for those churches that need to produce e.g. Eldership lists.

You can produce reports for, labels for, or email, each person or each household included in the output file. (to email households you must have stored a household email address).

Reports Labels Email

Select whether you want a label for each person or a label for each household then click on Output. You will be offered a range of label designs.

Label for each person
 Label for each household

Reports or labels can be in postcode or name order and the output file contains all the information on each person so you can add whichever fields you wish to the report, or, for example, export the data to Excel if you wish to mail-merge with Word. Please note if you cannot see this option once you have updated the program you must give yourself the appropriate menu permissions. This is explained in the on-line help and manual.

Birthdays report (Reports menu)

This form has been improved by the addition of buttons to include or exclude all months. It is now much quicker to select for example only one or two months. Rather than unticking 10 months you simply exclude all, then tick the two months required. Birthday reports data can be exported to DBF, Excel and TXT, as well as Birthdays labels data.

People (Data menu)

The age is now displayed on this form, as well as the date of birth.

Estimated Year of Birth Age

Date of birth

People group directory and People skills directory (Reports menu)

The existing People group/skill directory by household forms have been improved in several ways.

Include	Exclude	Select the required group
<input checked="" type="checkbox"/>	<input type="checkbox"/>	BAPTISED
<input checked="" type="checkbox"/>	<input type="checkbox"/>	BAPTISM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	ELECTCUTHBERT
<input checked="" type="checkbox"/>	<input type="checkbox"/>	ELECTJOHN
<input checked="" type="checkbox"/>	<input type="checkbox"/>	FINANCE
<input checked="" type="checkbox"/>	<input type="checkbox"/>	FUNERAL
<input checked="" type="checkbox"/>	<input type="checkbox"/>	NEW
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PCCCUTHBERT
<input checked="" type="checkbox"/>	<input type="checkbox"/>	SIDESPERSON
<input checked="" type="checkbox"/>	<input type="checkbox"/>	WEDDING

You can select more than one group/skill to be included in the reports. A new report 'A4 + leader' has been designed to include information on the leaders (group directory) and each group will start on a new page. The output can be in name or postcode order, and the Birthday and Age data is now available for those who wish to add the fields to the reports.

Groups / Skills (Data menu)

You can now print labels either for each person within a group/skill, or for each household represented by the people within the group/skill. These options are available by clicking on the Printer button on the lower right of the form.

Salutation
<input checked="" type="radio"/> Formal
<input type="radio"/> Informal
<input type="radio"/> Envelope

Export	Labels
<input checked="" type="radio"/> Avery 2 x 7	<input type="radio"/> Label for each person
<input type="radio"/> Avery 2 x 8	<input type="radio"/> Label for each household
<input type="radio"/> Avery 3 x 7	<input checked="" type="checkbox"/> Exclude deceased
<input type="radio"/> Avery 3 x 8	<input checked="" type="checkbox"/> Exclude inactive
<input type="radio"/> Avery 3 x 6	<input checked="" type="checkbox"/> Exclude Never mail
<input type="radio"/> Avery 5 x 13	
<input checked="" type="checkbox"/> Hide 'United Kingdom'	
<input checked="" type="checkbox"/> Hide 'Unknown'	
Start at label: 1	

These forms have been further improved so that the upper part of the form displays how many participants there are in a group, or how many people possess a particular skill.

Groups (Skills) and participants report (Reports menu)

The number of group/skill participants is now shown on the Groups/Skills and Participants report.

'Unknown' and 'United Kingdom'

Two checkboxes have been provided on label printouts to hide the word 'Unknown' and/or the words 'United Kingdom' from addresses.

Security checks report (Reports menu)

A date range for review dates has been added to the form producing Security checks reports.

Group attendance (Groups, Data menu)

A drop-down list has been included on the form recording attendance so that you can select the default before selecting the date. It may be that for a particular date almost everyone was absent. You can set the default to Absent, select the date, and then change 'Absent' to 'Attended' for the few that were present.

Output forms

A Browse button has been added to *most* report output forms to show the data and field labels. This will display a grid of all the data that is available for inclusion in the report. The heading of each column shows the actual field name to be used on the report. This will make it much easier for those users who wish to modify reports.

Default for phone type is now Home rather than Email

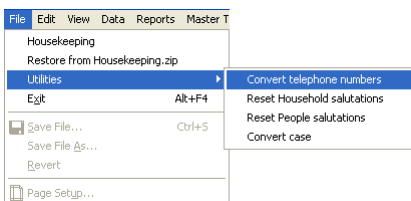
When adding contact details the default is now Home (telephone) rather than Email.

Task rota

The final display when building a rota (shown below) can now be exported. It is not possible to produce a printout displaying this grid from within MC because the final number of columns has to be known before a report can be designed. However you can now export this grid as e.g. an Excel file, load it into Excel, and print it out from there

Utilities

This option, originally a single form under the File menu, is now available as four separate sub-menu options under Utilities on the File menu. Please note if you cannot see these options once you have updated the program you must give yourself the appropriate menu permissions. This is explained in the on-line help and manual.



Contacts matrix

This new option (Under 'Other people reports' on the Reports menu), will display a grid showing all the contact details (both people and household) for each person. You can opt to have people and household details combined where appropriate and you can opt to exclude those who are ex directory. Please note if you cannot see this option once you have updated the program you must give yourself the appropriate menu permissions. This is explained in the on-line help and manual.