excellerate

Excellerate Check-In System
User Manual

Version 4.0

Table of Contents

Excellerate Check-In – How it Works

The Excellerate Check-In Station software streamlines your check-in process, automatically records attendance in the Excellerate database, and helps increase security for your children's services. Several check-in stations can be set up, and each can be configured differently. Each station requires a computer running Windows, and will typically have a label printer. Barcode scanners, touch-screen displays, and fingerprint scanners are optional.

The check-in stations are typically used for checking in children for church services, but can also be used to record attendance for volunteer workers, or even other types of events. The check-in software is extremely configurable, allowing you to customize the name badges, and optionally print other types of labels and receipts.

A typical check-in begins with the parent scanning their barcode key tag, fingerprint, or looking up their family using a touch-screen. Name badge and security receipts are instantly printed when someone checks in. The name badge will include the room assignment, and any special needs the child may have. The check-in receipt is kept by the parent and used to pick up the child after the service. The childcare worker will ensure that the security number on the receipt matches the security number on the child's name badge.

Two programs - The Database and Check-in Station

The Excellerate Check-In solution is made up of two parts:

Database - holds all of your people and attendance and has powerful reporting, emailing features, etc..

Check-In Station – Performs the actual check-in process, prints labels, etc…

The database part is usually installed on one of your office computers, or servers, and the check-in part is installed on each of your check-in computers. The check-in station reads the data from the database, and records new people and attendance in the database. If you only want to use one computer for everything, then you would install both programs on the same computer.

Online vs. Offline modes

If you have multiple computers, and they are all networked together, then you can run your check-in stations in Online Mode. Online Mode means the stations and database are connected together and attendance is recorded in real-time. So if a person checks in at station A, you can look them up on Station B, and see that they have checked in. Their attendance is stored in the database instantly.

If you have just one computer for the database and check-in station, then that is also considered online mode.

If you have multiple computers, and they are **not** networked together, then it will run in Offline Mode. With Offline Mode, you will create a small version of your database on a USB flash drive (one per station). The USB drive will be connected to the check-in computers during service. Anytime the station needs to search for someone or record attendance, it will use the information on the USB drive to do so. At the end of the day, you sync the USB drives up with your main database.

Excellerate Check-in - Quick Start Guide

1. Prepare the computers you will be using for the check-in station. Make sure they have enough USB ports for each piece of hardware you will be using. If these computers will be networked, make sure they have full access to a shared folder of the computer that will hold the Excellerate database.

2. If the stations will be using a touch screen, install the software that came with the screen then connect the screen to the computer. After you install the drivers from the CD, you should see a program running in your system tray (near the computer's clock) that will be used to align your touch-screen. Double click that icon to do the alignment.

3. If the stations will be using barcode scanning, plug the scanner into your USB port. To program the scanner, turn to the last page of this manual and scan every barcode in the order that they are printed. A check-in station may be equipped with both barcode and touch screen entry.

4. Insert the CD that comes with the Dymo printer. It will walk you through the instillation process and when it finishes, plug the printer into the computer. Do not connect the printer until the drivers are finished installing. **Note: The labels included in the printer box are samples from the printer's manufacturer and are not used for the check-in station.** The labels for the check-in station are usually packaged separately.

5. New Excellerate customers should now install the Church Management portion of the software on the server or computer that will hold the database. You can find information on how to set up the database in this manual.

6. Go to the member module and enter everyone you wish to track. See the topic on entering members into your database.

7. Go to each of the computers you will be using as a check-in station, and install the check-in software from the CD or the download file.

8. Configure your check-in stations for online or offline mode and adjust any other applicable options.

9. If you are using fingerprint scanners, you can find instructions in the appendix of this manual.

10. When it's time to reorder labels or other supplies, go to   www.excellerate.com/order   On the top of that page, enter your Registration code and Zip code (or postal code). That will log you into your account and allow you to order supplies, or upgrade member levels.

Installation

Installing the Excellerate Database Software

Install the Excellerate database software on your server or office computer.

Single Computer Installation

To install Excellerate, simply insert the CD into your CD-ROM drive, and the setup program will start automatically. If Auto-run is disabled on your computer, you may need to run the setup.exe program directly.

If you are downloading Excellerate from our website, simply double-click the file you downloaded to begin the installation.

Network Installation

Wireless Networks - Due to the high demand of a multi-user database and the possibility of dropped packets, we recommend that you not use a wireless network to connect your check-in stations to your database. A hard-wired network will give you solid reliability and the fastest performance.

First, install the application on the file server as in the previously described Single Computer Installation. Once installed on the file server, run Excellerate, and create your new database as described in the next topic. Make sure that the directory containing your database is accessible to all of the workstations that will be using the program.

Actually, the only files needed on the file server are the database, which will have a .MDB and .CFG extension, the report styles with .QR extension, and the Pictures directory (See Member Pictures).   If your move your database, make sure you move the report styles with it, otherwise many of the reports will not work.

If you have a previous version of Excellerate, make sure all computers are upgraded to the same version of the software.

Creating your New Database

If a database has not been created yet, you will see the following screen, which allows you to open a new database or one of the sample databases:
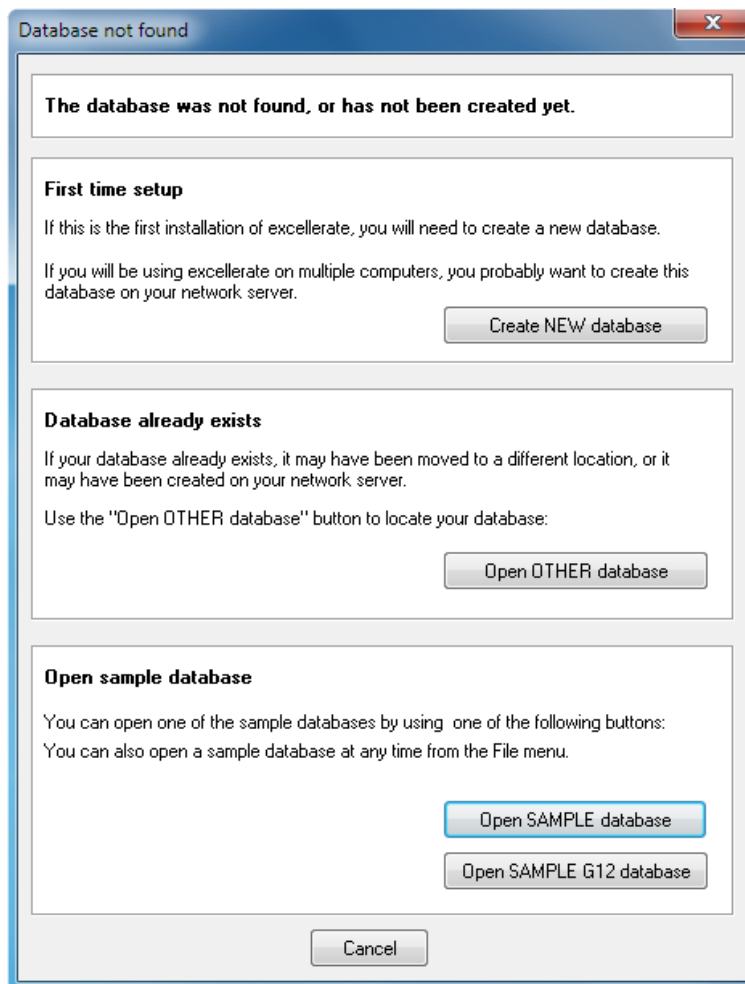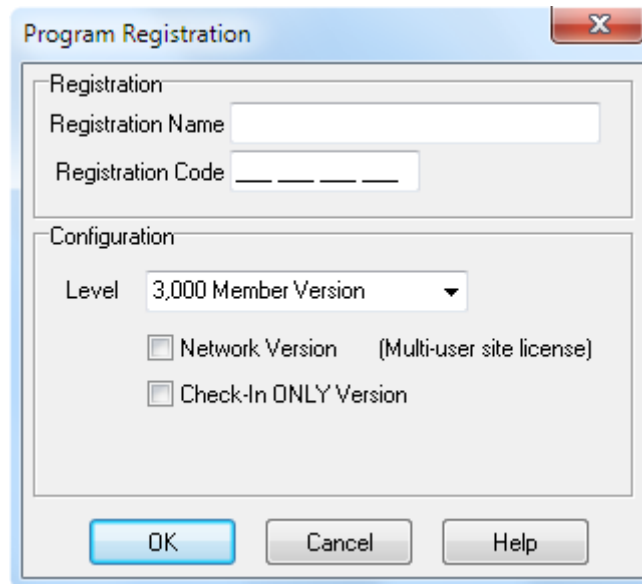
If this is the first installation of Excellerate, and your database does not exist yet, you can create a new database by clicking the "Create NEW database" button.

If your database has already been created, or if it exists on a server somewhere, click the "Open other database" button, and locate the database.

The default ID for new databases is "MANAGER," and the password is "SETUP". This may have been changed by the person who created the database.

Program Registration

After creating the new database, you will be prompted to enter the registration code, which activates the full version of the program. Your registration code is located on your invoice and inside the front cover of your user manual, or if you downloaded the program from the Internet, your code would have been emailed to you.

The Registration Name and Registration Code must be entered exactly for the program to register correctly.

The **0's** in the registration code are **Zero's**. Choose the configuration that you purchased including member level and Network Version if applicable.

If you purchased the "Check-In Only" version select that option.

Without registering the program, it will operate as a demo, limiting you to 50 members and groups. You can also access the registration screen from the Utilities menu.

Logging in

Once you've setup your preferences and users, you can now log into the system:

The login screen prompts you for your User ID and password. **The default User ID is MANAGER and the password is SETUP**. At the bottom of the screen, you will see the database that you are logging in to. If you wish to log into a different database you can hit the Database… button, which will prompt you for a database.

Install the Hardware on Your Check-In Stations

- Install the Dymo LabelWriter 450 Turbo printer and software on the check-in computers. Start the Dymo Label software, and print a sample label to verify the label printer is working correctly.

- Connect Symbol LS2208 scanner (if applicable), and **program it by scanning all of the barcodes** in the scanner setup sheet, at the end of this manual.

- Install the touch-screen monitor (if applicable), and the accompanying drivers. Align the touch-screen using the installed elo utility (the utility is a program on the installation CD. If you've installed the touch screen drivers, the alignment utility should be in your system tray near your computer's clock).

- If you have fingerprint hardware, first get the entire check-in system installed and configured before attempting to install the fingerprint hardware and software. See the chapter on configuring fingerprint recognition in the appendix.

Install the Check-In Station Software

Install the check-in station software on each check-in computer. Simply insert the CD, and the setup program will start automatically. If Auto-run is disabled on your computer, you may need to run the setup.exe program directly.

If you are downloading Excellerate from our website, simply double-click the checkin setup file you downloaded to begin the installation.

Check-In Station Configuration

## Deciding which mode to use - Online or Offline

Online mode means the check-in stations are connected to your network, and are able to open your Excellerate database located on another computer. Attendance is recorded in real-time.

Offline mode means the check-in stations are not connected to your network; maybe they are located in a separate facility. The stations will operate using a local "offline" copy of your Excellerate database, and attendance can be stored on a portable USB drive, and synchronized with the real database later.

Configuring Offline Mode

To configure check-in for offline mode, you will be using a portable USB thumb-drive to transfer data between your stations and the database on your main computer. So go ahead and connect a USB drive to the first check-in computer. Check to see what drive letter that USB drive was assigned by going to your Start Menu, then My Computer. Look for the USB drive under "Removable Storage", and note the drive letter, for example – E:
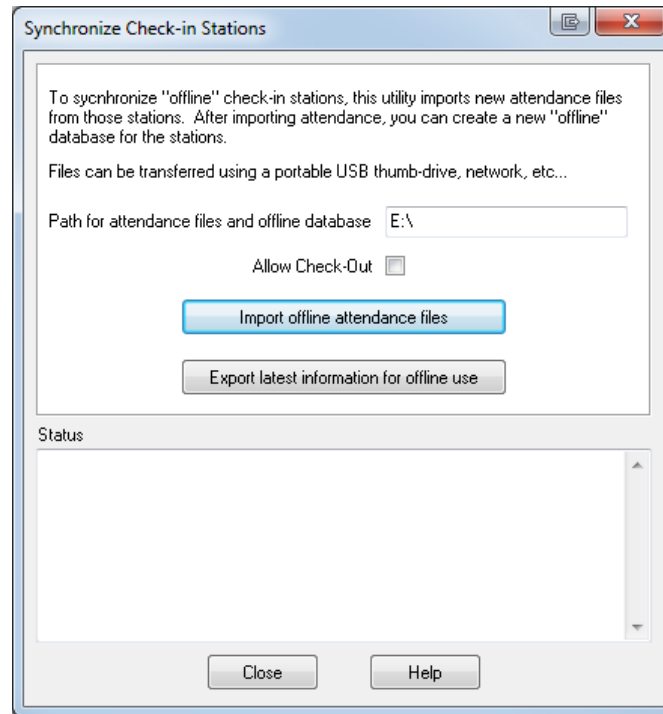
Start up the check-in station program by using the desktop icon. If you see a message about database not found, go to the options tab, and change Station Mode to "offline".
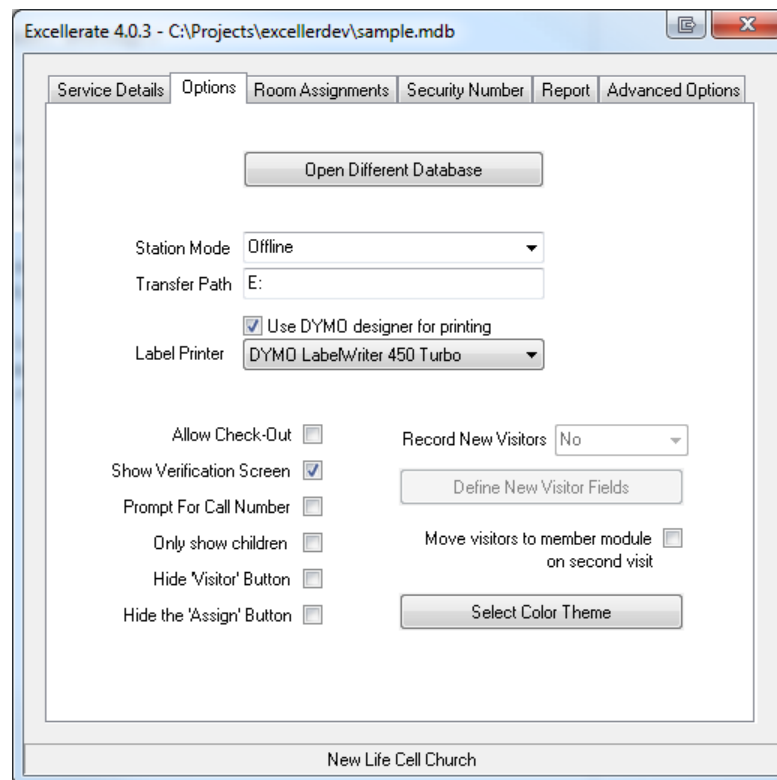
Now, enter that drive letter in the transfer path field. Close the program. Before you start it up again, we will need to create an offline database on the USB drive, using the Excellerate database program.

Insert the USB drive into the computer with the Excellerate database program. Start up the database program, and login. Go to the Utilities menu, then Synchronize Check-In Stations.
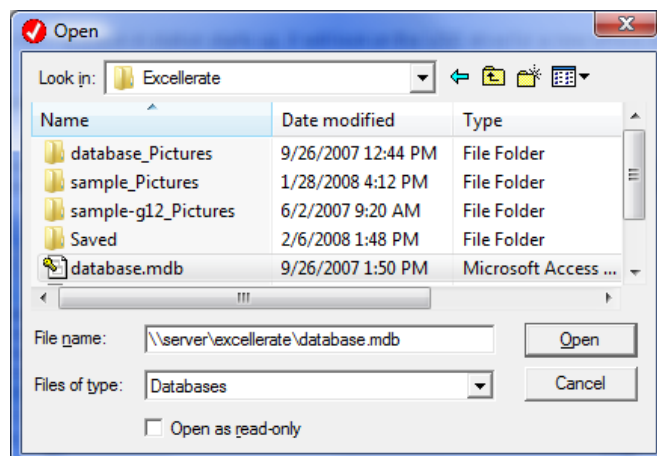
Check-In Station Configuration

Make sure the path for the offline databases is set to the drive letter of the USB drive. Note – the drive letter on this computer may be different than the check-in station, so go to My Computer and verify the USB drive letter.

Now, just hit "Export latest information for offline use", and an offline database will be copied to the USB drive.

Configuring Online Mode

To configure the check-in station for online mode, we just need to tell it where to find the Excellerate database. Make sure that database is on a server or computer with a shared folder accessible to the other computers.

Start up the check-in station program by using the desktop icon. If you see a message about database not found, use the "Open Different Database" button in the Options tab and navigate to your server or computer where the Excellerate database is located. Or if you are just using one computer, navigate to C:\Excellerate to open your database.

Repeat this configuration for each check-in station computer.

Configuration Settings

Excellerate Check-In Station is extremely flexible so that it can work with all of the different check-in scenarios for different churches. Review the following options and adjust them to fit your needs.

Service Details Tab

The Service Details tab lets you choose which church service you are checking in for, and what labels you would like printed out.

Service Type	Identifies which church service type you are recording attendance for. New service types can be setup in the Excellerate dataase under Options, Picklists.
Default Label Style	Identifies the label style you want to use for name badges.
Item Tag Style	Identifies an optional label style to be used for items that are checked-in with the child, such as nursery items - bottles, bags, etc… The parent can be asked how many item tags are needed, or automatically print.
Extra Label Style	Identifies an extra label style to be printed with each check-in.

Receipt Style	Identifies the label style you want to use for the pick-up receipt.
Adult Label Style	Identifies an optional label you want to print for adults checking in (Volunteers, etc...)
Visitor Label Style	Identifies the label to use for visitors.
Printer Roll	When used with the Dymo LabelWriter Twin, you can assign each label to print on the left roll, or the right roll. For example, the name badges can print on the left roll, and the receipts can print on the right.

Options Tab

The Options tab allows you to specify common configuration settings.
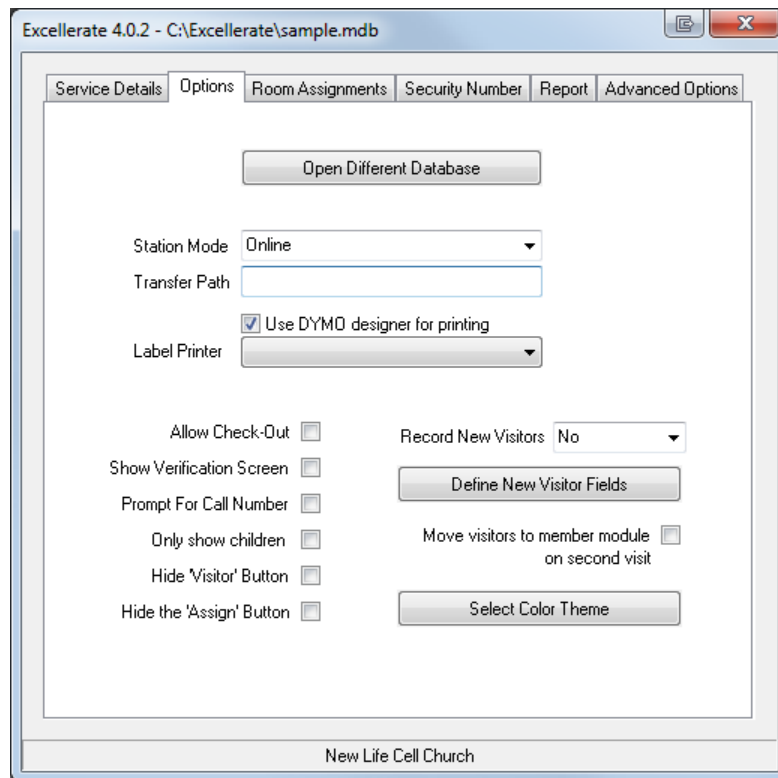
Open Different Database	Tells the check-in station where your member database is located.
Station Mode	"Online" if you have network access to your Excellerate database. Attendance is recorded in real-time in the Excellerate database.

"Offline" allows the station to run from a local copy of the database. Attendance data can be transferred to the server via USB drive. |

Transfer Path	In offline mode, this is the path to store attendance updates, so they can be imported into Excellerate later. This could be a portable USB drive used to transfer the updates to the Excellerate computer.
Use Dymo designer for printing	If you are using a Dymo label printer, you can use the Dymo designer software to design and print your labels instead of the built-in designer.
Label Printer	Specifies the printer you want to use for printing labels.
Allow Check-Out	This options configures the station for check-in **and check-out**. When the person checks-in, attendance is recorded, and labels are printed. When they check-out, nothing is printed, but the check-out time is recorded. Multiple check-ins and check-outs are allowed.
Show Verification Screen	When checked, the check-in station will bring up a verification screen showing the person's picture, basic information, and optional fields, after the person scans their barcode or is looked-up. An attendant can allow, or deny the check-in based on the information displayed. This feature is useful when checking in students to a youth ministry. This screen can also be used to capture member photos from the check-in system
Prompt For Call Number	Allows you to enter a call number or pager number during check-in. This number can be printed on the name badge.
Only Show Children	Only shows children when looking up names for check-in. * Don't select this option if you are scanning fingerprints for parents
Hide Visitor Button	Hides the visitor button. If you are using self-check-in, you may not want visitors to be able to check themselves in. You may want an attendant greeting new visitors. You will still be able to check-in visitors by using the F9 key on the keyboard.
Hide Assign Button	Hides the 'Assign' button. If you are using self-check-in, you may not want people assigning barcodes or fingerprints themselves. You will still be able to assign by hitting the F10 key on the keyboard, or using the GOASSIGN command.

Room Assignments Tab

The Room Assignments tab is where you can specify how to assign rooms to children based on their age or grade. You also assign specific rooms to individuals in the database, if you don't want to them to be automatically assigned.

The "Different room assignments for each service" field allows you to setup different room assignments for each service type. For example, you may use 5 rooms on Sunday mornings, but only 3 for Wednesday night services.

To add new room assignments, use the [+] button at the top of the screen:

You can assign children based on their age in years and months, or you can specify specific 'Date of Births', which is helpful for assigning children based on **the age they will be** on a specific date. You can use the "More…" button to help you calculate the 'Date of Births'

You can also assign based on grade levels by choosing the starting and ending grade levels.

Note – grade levels are setup in the Excellerate database under Options, Picklists, Members.StudentType field.

In the "Ask for Item Tags" field, enter a Y if you want the user to be prompted for Item Tags (extra tags for bottles, diaper bags, etc.) when a child is checked into this room. You can enter a number from 1-9 if you want that number of item tags to automatically print without being prompted.

Sometimes you can't predict what room a person should be assigned to. For example, a volunteer may serve wherever needed at the time. In this case, you could prompt the user for a room assignment during check-in. When they check in, they would see a screen similar to the following.
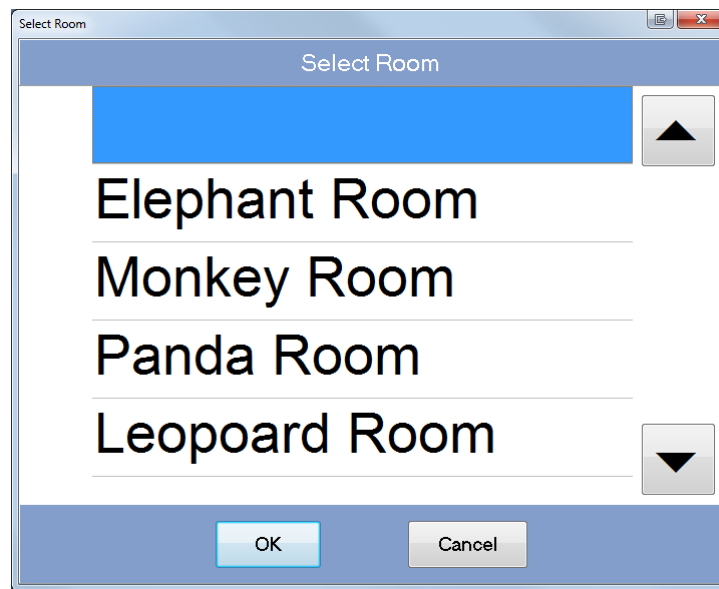
You can also configure this to appear under certain conditions. Hit the Special Conditions button to specify an expression that will tell the "Select Room" screen to appear. If that condition results in anything other than a blank or 0, then it will show the verification screen.

For example: Age > 13

There are too many possible special conditions to describe, so you may want to contact technical support for assistance.

Security Number Tab

The Security Number tab lets you configure how the security numbers are generated.

Check-In Station Configuration

Station Code	Used to generate unique security numbers. **Each station needs a different Station Code**.
Starting / Ending number	Security numbers are sequentially assigned beginning with the "Starting number" and start over when they reach the "Ending number"
Add random character	This option tells the check-in station to add a random letter to the security code which helps prevent someone from predicting a security number.
Use Call Number for Security if exists	Labels will use the Call Number, if a person has one assigned, as the security number. If not, it will generate a security number.

Report Tab

Check-in Report	Preview or print a quick check-in report. More detailed reports can be found in the Excellerate program under Reports, Check-in Attendance Reports.

Advanced Tab

The Advanced tab allows you to specify advanced configuration options.

Define extra data fields	Specify extra data fields needed for your labels. These must be fields from the Member table (see built-in help under "data dictionary") You can also use your own Flex-Fields if they have been created in Excellerate first.
Special condition for verify screen	If you only want the verify screen to appear in certain cases, say a person is certain age, you can specify a condition. If that condition results in anything other than a blank or 0, then it will show the verification screen. For example: Age > 13 There are too many possibilities to describe, so you may want to contact technical support for assistance.
Do NOT record Attendance	Allows printing badges only, and not recording attendance.
Use Pre-Printed Barcodes	If you are using barcodes that were pre-printed, even from other sources such as a drivers license etc…, select this option. It will allow you to use the "Assign button" to assign those barcodes to people in the database.
Auto shut-down after 4 hours	It's not a good idea to leave any of the Excellerate programs running indefinitely. This option closes the check-in station after 4 hours of not being used.

Check-In Station Configuration

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Admin mode Service & Team Picklists	Admin mode is used to scan barcoded check-in sheets after the service. This can be used for volunteer attendance tracking where volunteers check a box on a barcoded check-in sheet. The barcodes can then be scanned after the service, and this mode allows you to choose the service & team you are scanning.
List Font Size	Font size for the names listed on the check-in screen.
Don't print for children over age	Allows you to prevent printing labels for children over a certain age.
Use Fingerprint Reader	Select this option if you are using the fingerprint reader for check-in.
Fingerprint Server	Specify the fingerprint server name or IP address. If the fingerprint server software was installed on this same computer, use localhost.

Global Settings allow you to easily import and export your entire check-in settings into different file names. This is useful if when you are constantly re-configuring your check-in stations for different services. So instead of re-configuring each time, you can just import all of your settings from a file.

You can also create different desktop icons to automatically configure your check-in station from one of your configuration files. For example, you may have a youth service with special name badges and no security receipts, and your nursery check-in uses a different name badge style and security receipt. You can create two global settings files, then have two desktop icons: "Check-In Nursery", and "Check-In Youth".

Import Settings	Imports a global settings file
Export Settings	Creates a global settings file
Make desktop shortcut from global settings file	Once you've created a global settings file, this button will create a Check-In desktop icon that automatically loads that specific settings file.

Custom Designing Your Own Name Badges

Excellerate can use two different label designers, depending on which label printers you are using.
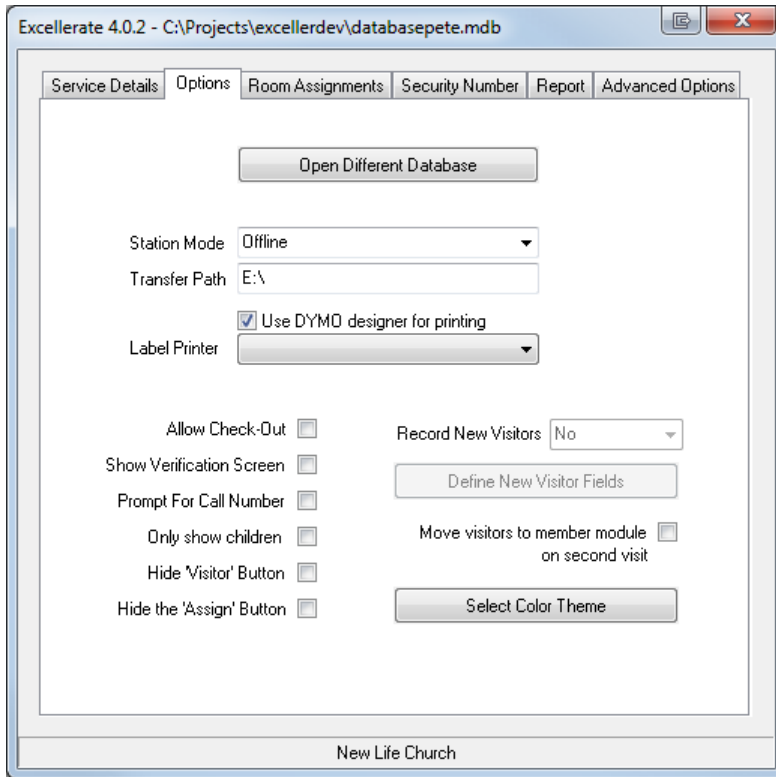
If you are using the Dymo printer, use the Dymo Label Designer that is installed when you setup your Dymo printer to design your labels. To use the Dymo designer, make sure "Use DYMO designer for printing" is checked in the options tab.

If you are using a Zebra, or other label printer, you must use the built-in label designer so make sure "Use DYMO designer for printing is NOT checked.

Using the Dymo Label Designer

To modify a label style, hit the "…" button next to the label you want to modify on the Service Details tab of the check-in software.

The label designer creates .Label files. For instance, if you made a file named "checkin," the full filename would be "checkin.label". These should be stored in the Excellerate folder on each check-in computer. To use fields from Excellerate on your labels, assign Reference Names (field names) to the objects by right-clicking and selecting Properties. For example, to print the child's first name on the label, add a text object to the label, and change the reference name to: Firstname

If you want to use the same field on the label more than one time, name the duplicate fields ending with (1) or (2), etc.. example: FullName(2)

Fields Available For Label Design:

Field	Example / Explanation
Lastname	Tina
Firstname	Adams
Relation	Child
DOB	03/15/2004
SecurityNumber	A44
SecurityList	Tina A44, Tommy A45, Lisa A46 (for the whole family)
FullName	Tina Adams
Service	Celebration
ServceTime	Celebration: Sunday, November 5, 2006 8:57 AM
Time	Sunday, November 5, 2006 8:57 AM
FF_RoomAssignment	Nursery
FF_RoomAssignmentPicture	Prints a picture for each RoomAssignment (picture should be named Monkey.jpg, etc…)
FF_CallNumber	35 (or whatever call number you assign)
MemberPicture	Picture of the member
FamilyPicture	Picture of the family
FamilyHeadPicture	Picture of the head
FamilySpousePicture	Picture of the spouse
FamilyParents	Joe Adams, Mary Adams

FamilyHead:field	Prints a field from the head's record
FamilySpouse:field	Prints a field from the spouse's record
Prompt:prompt msg	Prompts the user to enter some text for the label
	For example: Prompt:Special Notes?

You can also use most fields from the Members table, but you will first need to list the fields you want to use with the "define extra fields" button in the options tab. (see Excellerate's built-in help under "data dictionary")

You can also use your own Flex-Fields if they have been created in the Excellerate database first.

To print a graphic or logo when using the built-in designer, you use the following field:
PICTURE:'filename'   where filename is the full path to your logo file.

If a receipt label style has the word FAMILY in the filename (such as Family check-in.lwl) then the check-in station will not print individual receipts, but will print one family receipt instead.

* When using graphics on your labels, try to use simple, line-art, black & white .BMP files. Using color graphic files may cause your labels to print much slower.

After modifying any labels, you will need to copy those files to each check-in computer.

Using the Built-In Label Designer

If you are using the built-in label designer and do not have a dymo printer, you'll need to set the default paper size for your printer. (Note: If you choose to use the build-in designer, but have a dymo printer, you do not have to define your paper size.) You set your default paper size by going to your printers in your computer's control panel, right-click the printer, and choose properties. Go to Printing Preferences, Advanced, and make sure the Paper Size is set correctly.
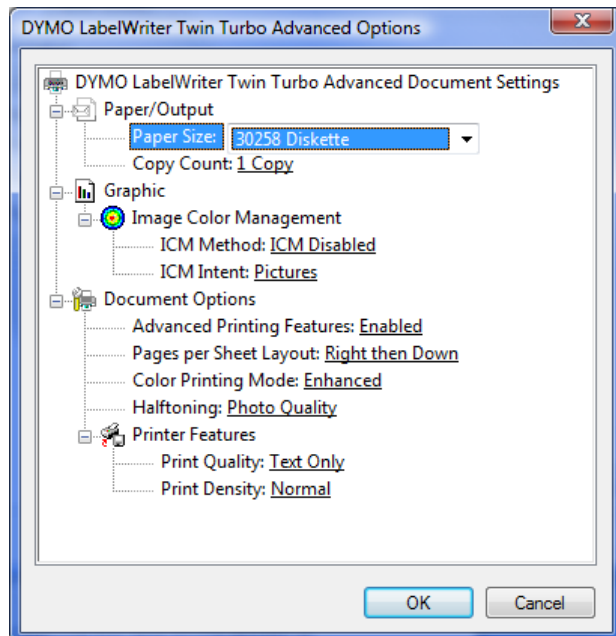
To modify labels go to the Service Details tab of the check-in station software:

Check-In Station Configuration

To modify labels, use the "…" button next to the label styles on the Service Details tab.

Hit the Modify button to make changes to the labels.

See the section on "Creating Report Styles" in the Excellerate database section of this manual or for general information on using the built-in designer. For a list fields that can be used on the labels see the list "Fields Available For Label Design" in the previous section.

The check-in report styles are saved on each computer, unlike the other Excellerate report styles. So if you make any changes to these report styles, you would need to make those changes on the other computers, or just copy the report style files to the other computers. The check-in report styles are all called CI_xxxxx.QR

* You must make sure the paper size is set correctly in the printer and report style for the labels to print correctly. Label printers can vary when it comes to paper sizes. If your label printer supports a "Custom Paper" size, you should specify "Custom" when designing your label. But, if your printer does not support custom paper (like the Dymo), you need to specify "default" paper size in your label design, but you have to remember to set the paper size in the printer's Printing Preferences.

* If you are using the built-in label designer with a DYMO printer, you will need to adjust the left-margins on your labels to .05 inches.

Using the Check-In System

Entering Members into the Database

You will use the Excellerate database to enter the members for the check-in system. Detailed instructions about using the database can be found in the Section on using the Excellerate database, but for now we will look at the basics for entering people into the database. Start Excellerate, and make sure you are in the Member module.

To add a new member to the system, simply press the [+] (add) button or hit insert, while viewing the member browse. When adding new members, there are several 'Required Fields' that must be entered before you can save the entry. These fields are highlighted in a light-red color. You can specify which fields are required fields in the Utility menu. For new members of a new family you do not need to select a family. The program will automatically create a new family entry for you.

Most of the fields are self-explanatory, but notice the fields in the top-right section. These fields have special meaning in the check-in system:

The Room Assignment field allows you to specifically assign a room assignment to a member. The check-in system can automatically assign the room based on age or grade, but if you specify a room here, it will be used instead of the automatic one.

If you plan on using pre-assigned room assignments, you will need to enter the list of available rooms by going to the menu Options, Picklists. then choose the field "Members.FF_RoomAssignments".

The Call Number field can be used for pre-assigned call numbers, if you have them. Otherwise, you would use the security number that is automatically printed on the name badge as the call number when notifying parents of a need.

The Security Number field records the last security number generated for that child. Just in case the child loses his name badge, you can still lookup the security number for notifying parents of a need.

The Medical / Other Conditions field allows you to specify special instructions or medical conditions that you want the nursery workers to be aware of. This will print out on their name badge

Preferably, you would enter the entire family into the database, including parents. But, if you are trying to keep the number of records within the limit you purchased, you can just record the parent names in the comment field of the children. This won't allow you to print parent letters, or emails but at least you would have a record of their names.

Finally, make sure you set the relation to 'Child' for your children, and enter the Birth date if you want automatic room assignments

Starting the Check-In Station

Start the check-in station using the desktop icon. Choose a Service Type, and hit the "Start" button to bring up the check-in screen.

This check-in screen is used for both self check-in, and attendant assisted check-in. When used with a touch-screen, members can self check-in by touch-typing on the screen. When an attendant is helping with check-in, they can use the touch-screen, or the normal keyboard.

There are several ways of checking in – searching, barcode, or fingerprint.

When searching, you can search for a family by entering the last four digits of their home phone, or by entering a few letters of their last name, and hit the "Find" button. The screen will list all matching people. You simply select the individuals who are checking in, and hit the "Check-In/Out" button.

When using barcodes, you can assign the barcodes to pull up an individual, or the whole family. When the barcodes pull up one person, it will automatically do the check-in. This is the fastest way of checking in children – you just scan each child's barcode.

When the barcode pulls up the family, you must first select which family members are checking-in, and then hit the "Check-In/Out" button.

Fingerprint scanning can be used to check-in one person, or the family. Again, if it pulls up the whole family, you must then select which family members are checking in.

New visitors can also be checked in and receive a badge and security receipt by using the Visitor button. See Visitor Tracking for more details.

What Happens During Check-In

When a person is checked in, several things happen:

- Attendance is recorded in the main database, for the individual.

- A name badge is printed with a unique security number. The badge will also have their room assignment, special medical conditions, and other information.

- If the child is assigned to a room that is configured for item tags (for bottles or diaper bags, etc…), then one or more item tags will be printed.

- A two-part security receipt will be printed for the parents. The receipt is made to be torn in half if you need to give one to each parent.

- Optionally, an extra label can be printed for some other purpose.

At any time, you can look-up an individual, and see if they are currently checked in.

Checking Out

If you want to use check-out, make sure you choose "Allow check-out" in the options tab.

Checking out is optional. The Check-In system does not require you to check out people. If a person has not checked out, by the end of the day, the system assumes they've checked out. The advantage of checking-out is that you would have a record of that, so at any time you could report who is here and who is not.

Check-out is performed just like check-in. You simply re-scan their barcode, fingerprint, or search. Nothing is printed during check-out. The system simply records the time out. You could also configure the check-in system to print a barcode on the receipts and scan the receipts on check-out.

You can also check-out all members currently checked-in.   This might be helpful when one service

ends and another begins. To check-out all members, type **GOCHECKOUT** in the search box and hit the **Find** Button.

Typically, you wouldn't require new visitors to check-out, but if you do, you would have to have the system configured to record visitors in the database. If you are storing new visitors in the Member module, then check-out is identical to normal member check-out. If you are storing new visitors in the pre-member module, then the only way to check-out would be if you are printing their barcode on the receipt. You would simply scan the receipt.

Visitor Tracking

There are two ways to track visitors in the check-in system.

The first method allows you to quickly ask for the visitor's name only, and immediately printout a name badge and security receipt. **The visitor's name is not recorded** in the database. A visitor attendance record is recorded, but you won't know who the visitor is. To choose this method, go to the Options tab, "Record New Visitors", and choose No. If you need to edit the attendance records of these anonymous visitors, you can use the menu option in Excellerate - Utilities, "Anonymous Check-In Visitor Attendance".

The second method allows you to enter the details for each visitor, including name, phone, address, etc… which are stored in the database in either the Pre-Member module or Member module. This can be done by the visitor themselves using the touch-screen, or it can be done by an attendant with the regular keyboard. Attendance records are also recorded, and individual visitors can be printed on the attendance reports.

The following is an example of the new visitor screen:

To choose this method of recording visitors, go to the Options tab, "Record New Visitors", and choose either Pre-Members or Members.

You can define which fields you want to appear in the new visitor form by using the "Define New Visitor Fields" button. This will bring up the "Visitor Fields Editor".

The Visitor Fields Editor allows you to specify which fields you want use when adding new visitors to the database. To add a new field, use the [+] button.

Here you specify the field from the database, such as Firstname, HomePhone, etc… and the title for that field. You can specify a default value that will automatically be filled in for that field. You may want to default your City and State fields automatically.

If you want the field to have a pick-list, check that box, and specify the value you want to appear in the pick-list. You can specify the items separated by commas, such as: Website, Advertisement, Friend. Or you can use the predefined option for that field, such as MEMBERTYPES for the MemberType field. This will automatically fill in the pick-list with all of the member types defined in your database

If you want this field to be required during data entry, select the "Required" option.

You can also define hidden fields that won't actually display on the new visitor screen, but you can assign values to those fields for the new visitors. For example, you may want to set the "FollowupFrom" field to the value "CheckIn Visitor". Simply choose the field "FollowupFrom", choose "Make this a hidden field", and set the "Default Value" to "CheckIn Visitor"
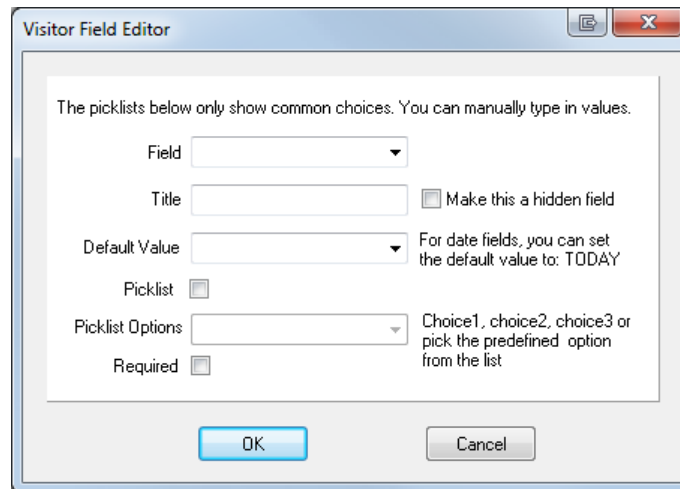
After configuring one station with your visitor fields, you can copy the visitor configuration file "visitorfields.ini"   to the other check-in station's C:\Excellerate folder.

How to Check-In New Visitors

If you chose not to record visitor details, then to check-in a new visitor, simply type in their first and last name and hit the on-screen "Visitor" button, or the F9 key on your keyboard. The visitor name badge and receipt will be printed immediately.

If you chose to record visitor details, then first press the "Visitor" button, or F9 on your keyboard, and the visitor entry screen will appear:

This screen allows you to collect the new visitor information necessary for a full check-in. You can add additional fields, like Address or Cell Phone, etc… You can also define hidden fields to assign specific values for things like follow-up fields.

Room Assignment can be calculated automatically based the child's date of birth, or you can choose it from a pick-list.

When new visitor information is entered, the program will first check to see if this person has already been entered in the database by comparing their name, and phone number. If the visitor is not found, it will be added to the Pre-Member or Member module of the database, depending on your choice for the "Record New Visitors" field.

If the program can't find that specific person in the database, but does find an existing family (based on the phone number), it will ask you if that is the correct family, so the new person can be added to that family.

Entering New Visiting Families

When new families visit your church, you can enter the entire family using the check-in system. To speed up the check-in process, you may want enter the child first (minimal info: name, phone, DOB), and let the family proceed to the service. Then during or after service, you can enter the parents' information. As long as you enter the same phone number, the family members will be grouped together in the same family. They can all share the same address, so you don't need to enter the address for each family member.

Repeat Visitors

If you decided to record new visitors in the Member module, then repeat visitors can check-in just like a regular member would, using the "Find" button, barcode, etc…

If you decided to record new visitors in the Pre-Member module, then on their second visit, they would check-in using the visitor button again, but this time their information will be moved to the Member module. Once in the member module, they can be issued barcode key-tags, assigned fingerprints, etc... so they can check-in like a regular member in the future. If the visitor's whole family was in the Pre-Member module, the entire family would be moved to the Member module.

When a visitor is moved to the Member module, they are automatically checked-in. If a family is moved to the Member module, the family will be listed on the check-in screen for you to select which members are checking in at that time, just like a regular family check-in.

When you use the Visitor button for a repeat visitor, you don't necessarily have to enter all of the fields. The check-in system will find their previous record in the database, and use that information. If you want to provide new information during the second visit (to fill in missing information), you can.

Adding People to the Member Module from the Check-in Station

Most of the time, you will want to add first time visitors to the Pre-Member module, because you're not sure if they will be coming back, and you don't want to fill up your Member module with a lot of people who are not coming to your church.

But, there will be times when you want to add a person directly to the Member module. You can use the GOADDMEMBER command to force adding a new person directly to the Member module. To use this command, just type GOADDMEMBER in the main search field, and hit Find. This will bring up the visitor form, but will add them to the member module.

Visitor Check-in for Offline Mode

Stations configured for offline mode will be able to check-in visitors, but not store their information in the database. An anonymous attendance record will be recorded, but not the visitor's details. New visitor details will need to be added into the main Excellerate database from some type of "new visitor form" collected during check-in.

Volunteer Check-In

The check-in system can also be used to track volunteer attendance. There are two ways to track volunteer attendance:

You can track it exactly like the usual church attendance process, in which case there's nothing else to configure. When the volunteer checks-in, a church attendance record is recorded in the database. You may not know specifically which team they served on, but you know they served that day.

You can also track the specific teams they served on by setting up your teams in the database. In this case, when the volunteer checks-in, they will be prompted for the services and teams they are serving on that day.

Volunteers should be tracked in the Organizations module of the database program. You should create organizations for each volunteer team, such as Parking, Greeters, Worship, etc... then add the volunteers to those teams.

In the check-in system, go to the advanced tab, and check the box for "Prompt volunteers for services and teams". Then go back to the "Service Details" tab, and you should see a new section called "Services for volunteer check-in". This is where you define the specific services you want volunteers to check-in to for the day. So if you have a Wednesday night service, you will only want to choose the Wednesday service. On Sunday, you want to select all of your Sunday morning services.

Now when a volunteer checks-in, they will see the following screen that allows them to choose each service and team they are serving on:

You simply choose the service, then the team, and it will be added to the list at the bottom.
The "* Just Attending *" entry allows them to say they are not serving on a team for that service, just attending. They can also choose the next service, and select a team that they are serving on.

You can even choose multiple teams for a service, for example, "Sunday 9 - Parking" and "Sunday 9 - Worship"

When you add services to the bottom, you can remove any mistakes by clicking the red "[remove]" link.

By default, this screen will show every team assigned to the member. If you find that there are too many teams listed, you can add team selection criteria in the "Advanced Options" of the church management software. There are a few example options to pick from, but you can add any SQL selection criteria from the Organizations or MemberOrganizations tables. For example: Organizations.Type='Service Team'
.

Re-Printing

If you need to re-print a name badge, item tag, or receipt, you can use the REPRINT command. First look-up the person you want to print, highlight their name in the list, then enter one of the commands below in the "Enter last 4 digits of phone or last name" field of the main check-in screen, and hit Check-in/Out button:

REPRINT
REPRINT BADGE
REPRINT TAG
REPRINT RECEIPT

To ensure security, you must enter a password to use the re-print feature. The password is: manager

Assigning Bar-Codes

The Check-In station is able to scan barcodes that have been assigned to a person's record to pull them up very quickly. We offer "excellerate" key-tags that are small enough to put on your key-chain, and are very durable. You can actually use many different sources of barcodes, such as driver's licenses or grocery store key-tags, but you will have to test them first to be sure they are compatible.

When using bar-codes, you must first assign them to the people you want to check-in.

First, make sure "Use Pre-Printed Bar-codes" is selected in the advanced options tab.

From the check-in station, you simply search for the people you want to assign, select one or more individuals that you want assigned to the barcode, then hit the "Assign" button, or use the F10 key. You will be prompted to enter the lookup code, or you can scan the barcode. When you assign a bar-code, it will check to see if anyone else has that bar-code already, and will ask if you want to clear those first. Now that the barcode is assigned, you can use it to check-in people.

You can assign any number of barcodes to a person or family. So each parent could have a different barcode that checks-in the child or family.

If you assigned a bar-code incorrectly, just re-assign it, and it will ask if you want to clear the old assignment.

You can also edit lookup codes from Excellerate in the church attendance tab using the button "Edit Lookup code for Check-In system"

If you want to lookup a barcode in the Excellerate database, you can use the included view called "Barcode Lookup (for pre-printed BCs)". This view will need to be imported in to the database from the Select Different View screen, and choosing "Import View From File"

Stopping the Check-In Station

To stop the station, type in **EXIT** in the "Enter last 4 digits of phone or last name" field of the main check-in screen and hit **FIND**, the program will close.

If you are using offline mode, leave the portable USB drive connected until the check-in station exits, then you may remove the drive.

If you just want to exit the check-screen, and go back to the program screen, you can type in **GOBACK** and hit **FIND**.

Synchronizing Offline Stations

Offline check-in stations use a portable USB thumb-drive to transfer data between your stations and the database on your main computer. If you haven't already configured your USB drives for offline use, see the section "Configuring Offline Mode" earlier in this manual.

When using offline stations, make sure you have the USB drive connected to the check-in station before starting it up. When offline stations start up, they will look in the transfer path (USB drive) for a new offline database (in case you added new members to the database, etc...). When the check-in station closes, it will copy new attendance files to the USB drive. After the check-in software exits, you can remove the USB drive and connect it to a main Excellerate computer.

To synchronize the databases after a service, connect the USB drives to the main Excellerate database computer. Go to Utilities, Synchronize Check-In Stations.
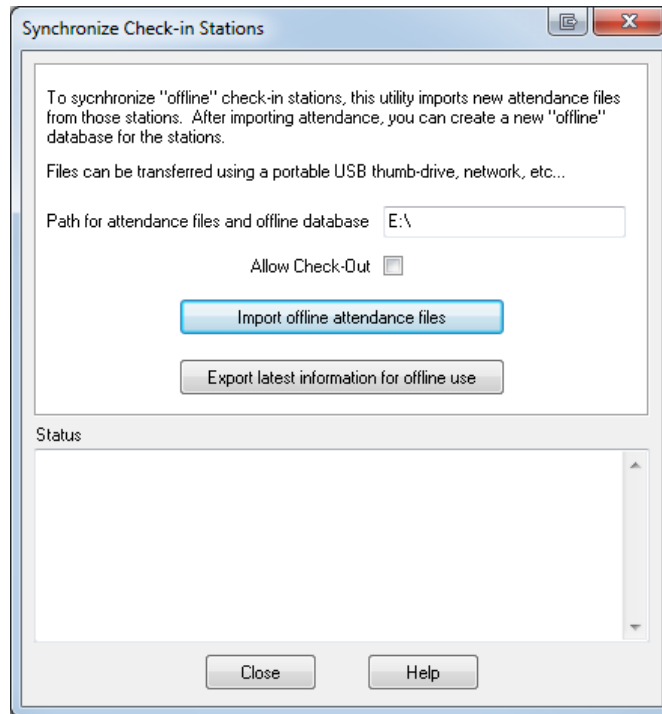
First, hit the "Import offline attendance files" button to import any attendance data from the USB drive. **Do this for each of the USB drives.**

After all attendance has been imported, hit "Export latest information for offline use" to copy the latest database changes to the USB drive. This will copy any new Excellerate member or attendance information to the offline database for use by the check-in stations. Again, do this for each USB drive

Quick Check-In Report

Most of the reporting will be done from the main Excellerate database program. See the Reports menu, Check-in Attendance Reports. Normal church attendance reports can be used as well.

A quick check-in report is available from the check-in stations by typing in the command: **GOPRINT** in the "Enter last 4 digits of phone or last name" field of the main check-in screen and hitting **FIND** This will print a simple check-in report on the label printer, or other printer if attached.

Setting up the label printer for printing the quick check-in report - You need to set the default paper size by going to Printers in your Control Panel. Right-click the printer, and choose Properties. At the bottom of the General tab, hit the Printing Preferences button. Then hit the Advanced button.
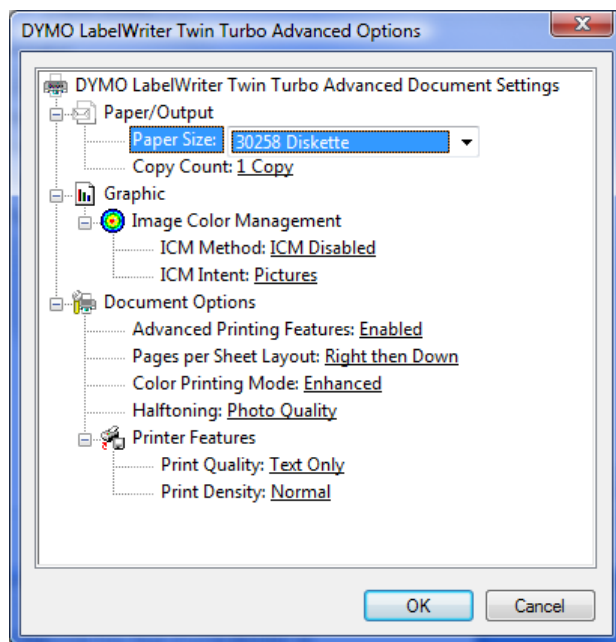
Change the Paper Size to: "30258 Diskette" or whatever label size you are using. Close all screens by hitting OK.

Excellerate Database

Note – some of the screen shots and documentation may refer to fields or features of our full church management program. If you have the check-in only version, you may not see some of those features in your version.

Member Screen

The Member screen as well as the other edit screens in Excellerate is divided in half. The top half contains all of the general information about the member, and the bottom half contains the associated information tabs.

Most of the fields in the member screen are self-explanatory, but we will highlight the fields with special meaning, or that are not apparent.

Member ID - A member's ID number is automatically assigned when the member is entered into the system. This number is unique to this member, and is used to link all other related information to the member.

Lastname - The Last name field can be used for a member's last name, or a business name.

Prefix - The Prefix has a user-definable picklist that can be modified in program options. For business choose Bus.

Relation - Specify Head if this member is the head of the household, otherwise choose Spouse, Child or leave blank. This field is also used to determine how to address mailing labels when using the 'Mr. & Mrs.' option.

Change Family – The Change Family button allows you to assign the member to a family. For new members of a new family, do not choose a family, and the system will create the family for you. Then subsequent members can be assigned to the new family. If a member needs to be removed from a family, this button can do that as well.

Status - The status field specifies the member's status. This can be Active, Inactive, or Deleted. Active members are current, active members. Inactive members are those that may have moved away, but have given contributions in the past year. These members must remain in the system until the end of the year. Then they can be deleted. Deleted members are marked for deletion. These members can be permanently removed from the system at the end of the year. Inactive and Deleted members can not be modified, or assigned to small groups, classes, etc…

Tag - The tag field allows you to select or tag various random members for printing, or exporting, etc. After tagging the records, use the view for viewing the list of tagged members.

Picture - The picture window is a thumbnail view of the picture assigned to this member. See member pictures in the appendix for more information on assigning pictures.

Member Type - The member type is used to classify the member. These types can be setup by the user.

Pastor Type - Pastor Type designates this member as a pastor. The pastor types can be setup using the picklists menu option.

Mail Code - Mail Code allows you to assign a code to the member. These codes can be excluded from mail-outs. You can use any code that is meaningful to you. Typically, N would be used to designate that this member should not receive any mail-outs, and E would mean exclude from E-Mails.

Envelope - The Envelope Number field allows you to assign a contributions envelope number to the member so that their contributions can be entered by simply looking up this number as opposed to searching for their name. Envelope is one of the quick search fields available in member searches.

Comments - The Comments field can be used for recording any comments, or other information for which there is no specific field. You can enter as much information in this field as you wish

User-Fields - The user fields can be renamed in the preferences option to any other item that your church wants to track for it's members. These fields can be set up to accept any value, or values from a picklist. You can also add your own new fields to Excellerate and place them in the member screen. See the section below on Flex Fields.

Flex-Fields - The Flex-Fields section holds new fields that you can create yourself. These fields are much more flexible than user-fields, and can hold many different types of information, such as check-boxes, numbers, text, etc… You can actually re-arrange the positions of these fields by right-clicking them and dragging them into place. These fields can also be used in views and reports. See the section on Flex Fields later in the manual.

Small Group Information - This Section shows what small group, if any, the user belongs to. If this field is underlined in blue, you can double-click it to jump directly to their small group. The fields below specify what divisions the member is assigned to. Members can be assigned to divisions, but not necessarily a group. New members may be assigned to a District, and Zone, for example to be followed-up on by that zone pastor, but they may not yet be in a group. When they do join a group, these fields are updated to reflect the divisions of the new group. These fields can be automatically assigned when entering the member's zip-code. See member addresses below.

Sponsor/Mentor/Friend - This is used when the member joins a group. If one of the existing group members were responsible for the new member joining their group, then that person would be recorded here. This way you would know to keep these members together when multiplying the group. You may find other uses for this field as well.

Member Addresses

To add a member's address, use the [+] button on the left side of the screen in the address window. The member address screen will appear.

Address Type allows you to specify whether this address is the home address, work address, etc… If you have already setup the zip-codes under the options menu, then as you type in zip-codes, the city and state will automatically be entered for you. Also by hitting the Auto Assign button, you can assign the member to a set of divisions. This may be a District for most small group churches. The other buttons to the left of the address window on the member screen are for editing, deleting, and viewing the previous or next addresses.

Family addresses and Split addresses

When a member is added to a family, they automatically get assigned to the family address. The family address is the address that is shared by all members of the family. If you pull up one of the family members, and change the address, it is changed for all family members. If you need to change the address for one of the family members, then that member's address needs to be split out from the family address. To do this you would choose 'split family address' from the member screen, and this will make that member's address separate from the rest of the family's. Then changes can be made to that address without affecting the other family members. If that family member decides to move back home, and you want to 'un-split' their address, you will need to do the following: Remove the member from the family by using the Change Family button, and then selecting Remove member from family. Save the member, then re-assign them to their original family.
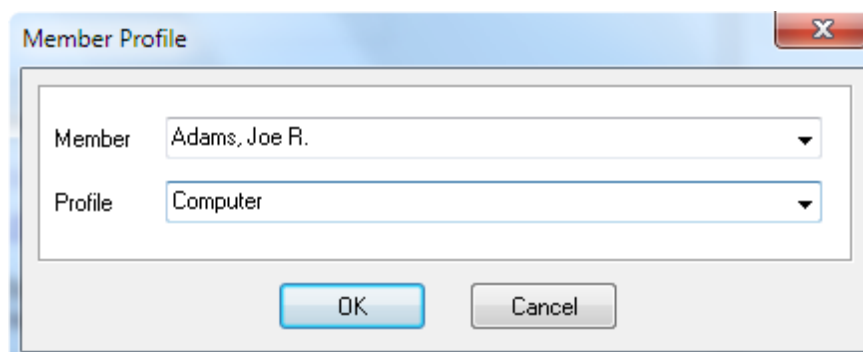
Members - Associated Information Tabs

Associated Information Tabs appear in the bottom portion of each member's screen, and contain various information associated with the member. The following associated information tabs are available from within the member edit screen:

Family	Lists any family members and their vital information
Follow-up	Includes date member joined, how they heard about the church, and other follow-up information
Profiles	Hobbies, interests or any other member attribute
Member Steps	Steps in the member's development cycle, such as water baptism, becoming a participator, or becoming a leader
Organizations	Organizations within the church in which the member participates, such as worship team or children's church
Visits/Counsels	Records any visits or counseling sessions with pastors, Including time, location, and any notes from the session
Classes	List of classes that the member has attended or is scheduled to attend
Member History	History of any changes in member information, such as address changes or name changes
Groups	Lists the small groups a member belongs to along with type and date the member joined the group
Group Attendance	Lists each small group meeting that the member has attended.
Contributions/Pledges	Lists member contributions and their pledges.
Church Attendance	Lists each church service that the member has attended.
Change History	Shows historical values for the fields you designate as History Fields.

The **Family Member** tab allows you to see all of the members of a family. Double clicking a family member will bring up their screen. Family members can quickly be added by hitting the "Add" button for this tab.

The **Follow Up** tab is used for following-up on new visitors or members. These people can be assigned a sponsor who would be responsible for following-up with them. You can track how they heard about the church, dates of first visit, or joined, and up to four contact attempts and their responses. All of the picklist values for these items are user definable in the Options menu.

The **Profiles** tab is used to track various attributes about a person such as interests or hobbies. You can enter any, and as many profile codes as you wish, as long as they have been set up in the member profiles list under the options menu.

With member profiles, you can search for members with a specific interest when a need arises in that area. This may include everything from locating volunteers willing to sew costumes to identifying people interested in bicycling that could assist in planting a special-interest small group.

The **Member Steps** tab allows you to track a member's progress through your churches member development process.

To add a new step to this member, use the [+] button:

From this screen, you can select a specific step to add to the member, or you can choose Pre-load 'Auto Steps'. This option will automatically load all of the member steps that have been designated as 'Auto-Steps'. This way, when you pull up a member record, you can easily see which steps have been completed, and which steps have not:

To indicate that a step has been completed, simply double click the completed field for the desired step.

The **Member Steps** tab is also used for tracking the details for Post-Encounter / School of Leaders classes in the G12 model. See the chapter on classes for more information.

The **Organizations** tab view allows you to track any organizations a member is involved in. These may include choir, prayer teams, kid's services, etc… Remember, you can double-click the organization to quickly jump to that screen.

The **Visits/Counsels** tab is used for recording visits, meetings, counseling, etc… between members and the staff, as well as between members and other members. Often in a small group church, group

leaders and members do much of the ministry as well as the church staff. You have the option of viewing visits with the current member, or visits the current member has had with others.

The **Classes** tab allows you to track which classes this member has taken, or is scheduled to take. This list will show each session of a particular class, so this tab gives more detail than if you had a member step indicating that the class was completed. Again, as in member steps, when adding a class, you can choose to add all sessions of a class to the member to make it easier to see what has been completed, and what is left. Also, the attended field can be double-clicked to quickly indicate that the member attended that session.

The **Member History** tab records certain changes that have been made to a member's record. This will show the members group membership history, and any changes to the 'History Fields'. You can setup which fields you wish to record change history on by entering them into the History Fields List under the Utilities menu option. The member history list also show which user made the change, and when.

The **Groups** tab shows which group this member belongs to, and which groups this member may lead. You will frequently want to jump back and forth between a member and their group, and can easily do so by double-clicking the group, or the member's name. You can also move a member to a different group from this tab, by editing the group member record, and hitting the Move to new group button. To remove the member from a group, use the same process but leave the "TO" group blank.

The **Group Attendance** tab shows which small group meetings this member has attended. Each meeting is listed indicating whether the member attended or not.

The **Contributions/Pledges** tab shows the member's contribution summary, and a choice of seeing their individual contributions, their family contributions, or their pledges. These contributions can be edited from this screen if the program options have been set to allow it.

The **Church Attendance** tab shows the date that this member has attended a church service. Time in and out can also be recorded which is useful for checking children in and out of children's church.

Adding Members

To add a new member to the system, simply press the [+] (add) button or hit insert, while viewing the member browse. When adding new members, there are several 'Required Fields' that must be entered before you can save the entry. These fields are highlighted in a light-red color. You can specify which fields are required fields in the Utility menu. For new members of a new family you do not need to select a family. The program will automatically create a new family entry for you.

Adding Family Members

While adding a new member, you can quickly add another family member by clicking the [+] (add) button for the family members tab. This will save your current member, and add a new record with the last name and address already filled in. Your cursor will be placed in the first name field ready for you to continue.

The other way to add a new family member, is to add them as described in Adding Members above, but this time, select the family they belong to by using the Chang Family button.

All family members by default share the same address. Any changes to the address will be applied to all family members. To specify a different address for one of the family members, you would use the split address feature. See Member Addresses above.

If you've made a mistake, and assigned a member to the wrong family, simply edit that member, hit the family button, and select a new family. You can also remove a member from a family by selecting "remove member from family" after hitting the Change Family button.

Editing Member Information

To edit a member record, simply double-click it, press enter, or use the edit button. Once you've made your changes, save them with the save button, or cancel your changes with the cancel button.
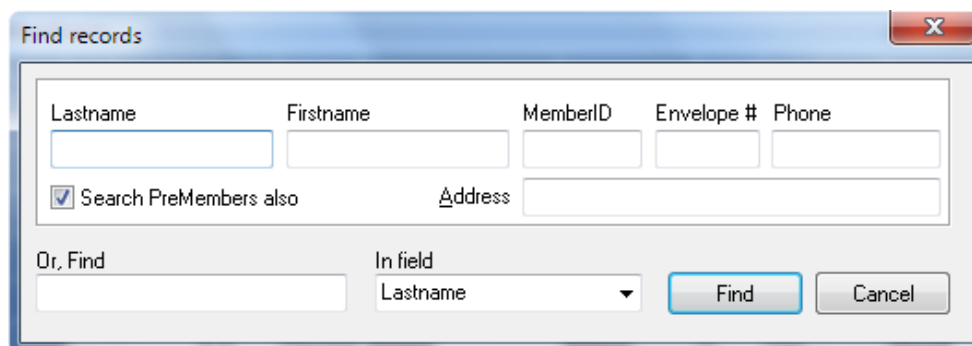
Deleting Members

To delete a member, use the [X] (delete) button from the member browse, or edit the member, and choose the Deleted status. This will only mark the member as Deleted, and not actually remove it from the system. This is so that history can be kept on these members, and so that you can recover the member if you deleted them by mistake. To physically and permanently remove deleted members, you use the Remove Deleted Members option in the Utility menu. This option can not be recovered from, unless you have a backup, so use caution. The remove option requires database security to perform.

The other choice in the member status field is Inactive. This is similar to delete, but you can not remove inactive members. This option would be used to hide members that are no longer active in the church, but may have given contributions this year. The system will need to keep these members until all contribution reports are printed. At that time, those members can be deleted.
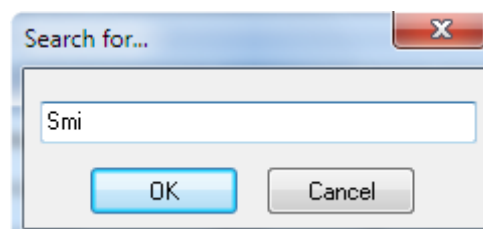
Searching for Members

There are two ways to search for members. First is to use the find button in the toolbar, or use the menu and choose Edit, Find.

This method allows you to quickly search by several fields. This type of search will return all members matching the search criteria in a search results view. Hit escape to return to the previous view.

The other way to search is to simply start typing a few letters of the member's name:

The "Search for…" window appears. This method will take you to the first occurrence of the last name that matches the search criteria in the current view.   You can also search for the last name, comma, first name. This will not find a member that is not in the current view.

Pre-Members

Once again, Pre-Members are the people you are interested in following-up with, or mailing out marketing information to. These may be first-time church visitors, or an area of your city that you may be targeting. Pre-Members contain all of the same information fields as a member, because at some point you are hoping to move a pre-member to the member module. The main difference between pre-members and members is that pre-members cannot join groups, classes, organizations, or other associated information tabs. They can have family members and follow-up information. Pre-Members are actually stored in a separate table to avoid slowing down accesses to member information.

At any time you can transfer pre-members to the member module. When you select the Pre-Member module, the "Move this person to Members" action appears in the Action menu. This will move pre-members from the pre-member module to the member module. This process will actually move the pre-member's entire family, assigning a new family number and member numbers. The addresses and follow-up information is transferred along with the pre-member.

Organizations

The Organizations Module is used to keep track of church organizations such as the choir, orchestra, prayer teams, or other committees. You could use organizations for any group that does not require tracking detailed attendance. With organizations you basically just assign members to them, and print out member rosters, and other lists.
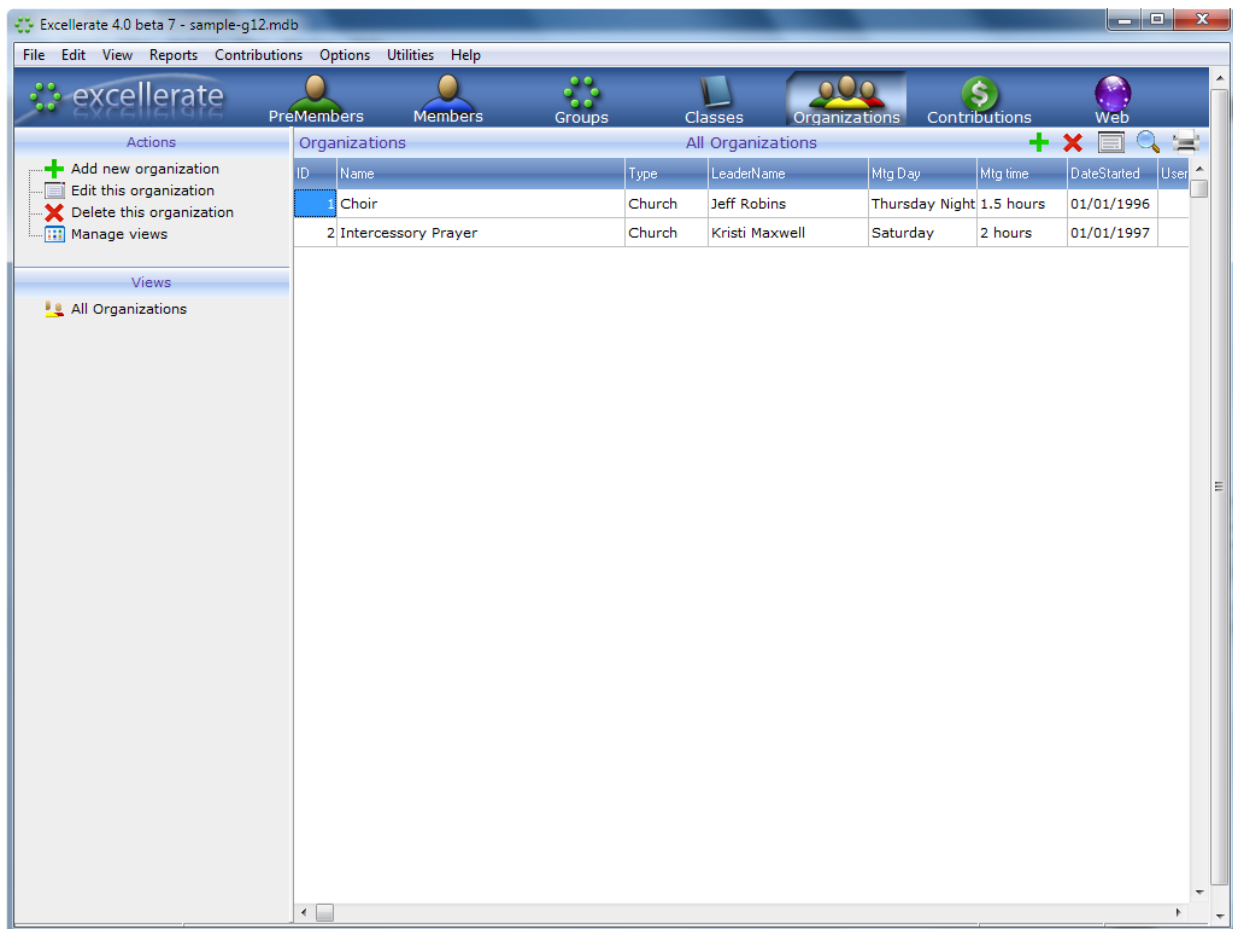
To add a new organization use the [+] (add) button on the right side of the toolbar.

Excellerate Database

Organization Screen

In the organization screen you can specify the type of organization by using the picklist configurable from the picklists options menu. You can also specify other information such as leader, meeting times, and up to five user fields which you setup in the program preferences screen.

Just as with groups, the Status field allows you to mark organizations that are inactive, but you still want to keep them around for their history. Inactive groups can be excluded from your default view, so you only see the active ones.

The only associated information tab in the organization screen is the organization's members. This tab lists the members that belong the organization, the date they joined, and a position if applicable. Members can be added by using the add button, deleted with the delete button, and edited with the edit button. You can jump directly to a member by double-clicking their name in the member organization information tab. You can also jump to this screen from a member's organizations tab by double-clicking the organization name.

Moving Tagged Records to an Organization

Sometimes it's handy to tag various people, and then decide it would be good to put them all in an organization. You can do that by choosing the view called "Tagged Records – Move To Organization". This will put all of the tagged records into whatever organization you choose.

Church Attendance

Excellerate includes the ability to track church attendance. Similar to group attendance tracking, you can now record individual member's church attendance. This can be used to track any number of different types of services including children's church. Entering church attendance is slightly different than entering group attendance because you have all of the members to choose from, not just those who belong to a group. The Member Module now has a special screen for entering church attendance. This screen lists all of the members in your view, and allows you to check them off if they have attended.

The ability to enter attendance based on a view allows you to use the church attendance feature for more than just Sunday service. For example, if you wanted to use it to track children's church, you would first select a view of all of the children, then hit the Church Attendance button. This way you only see the children while you are marking attendance. This screen also allows you to record the time in and out if desired. For a Sunday morning service, you can set the default time in and out to the service time, and those times will be recorded for each member. If you set one of the default times to 'Current Time', the program will use the current time to record their attendance. This again would be useful for checking children in and out. There are several ways of marking a person attended:

Double-click or press enter in the Attended column will set their attendance and their in and out times. Double-click or press enter in either of the time columns will set their attendance and only that particular time (in or out).
Use the All or None buttons to mark all members present, or none of the members.

Notice you can also double-click a member's name to jump to their edit screen. As you mark member's church attendance, the record of their attendance appears in their member edit screen in the Church Attendance associated information tab.

If you are interested in tracking counts of members, visitors, and other attendance, set up a group called Sunday Service, or whatever you call your church services, and enter those numbers just as you would a group meeting report. This way you can report and graph your church growth.

Remember you can track totals other than attendance such as the number of salvation's using this method.

Church Attendance Reports

Member church attendance can be reported in a chart similar to group attendance. You can view approximately 6 months of attendance at a time.

A church attendance report style has also been added to the Member Lists and Labels report to allow you to report individual member attendance.

Views

What Are Views

A view is basically a subset of the records for a particular module. Views allow you to look at the records you are interested in. This can make working with the database much easier because you are only looking at the information relevant to your task. Views can be quickly accessed in the View menu on the left, or from the View Manager (Views menu, Select different view).

Each module has its own set of views. For example, the Member Module will have views relating to members as in the following:
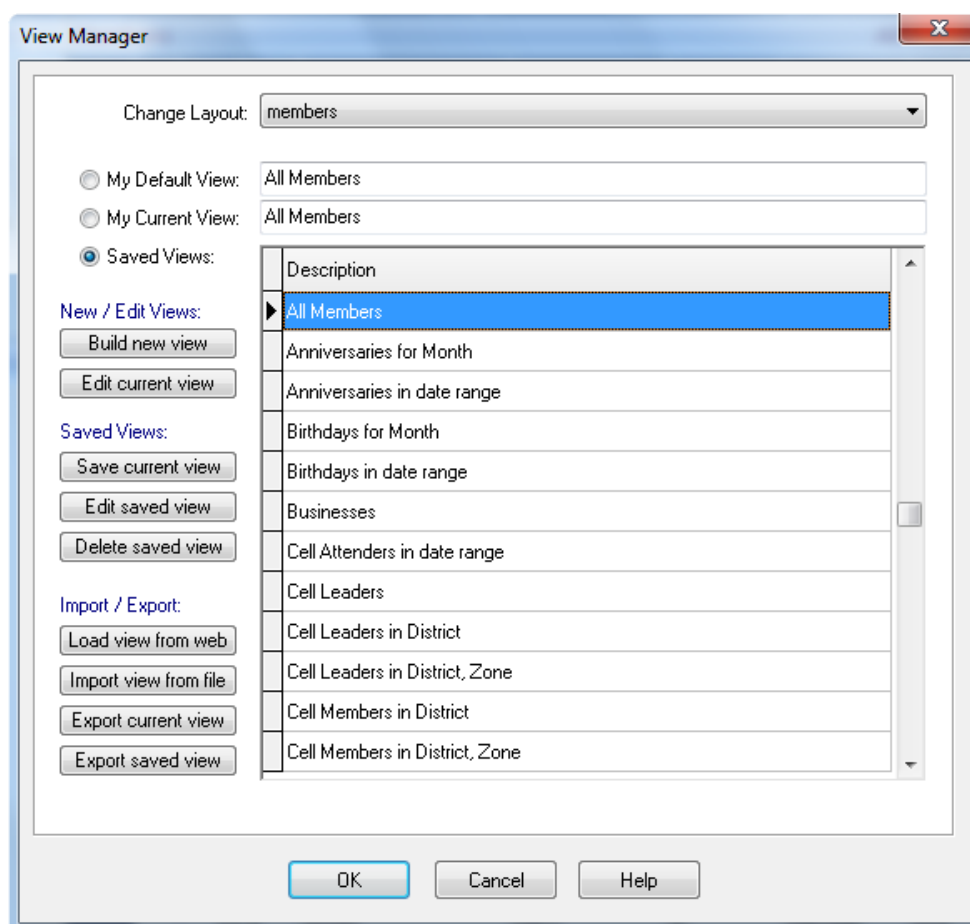

If you wanted to use a view that pulls up groups, you would have to be in the Group Module. Views also play an important role in reporting. If you want a report of all members who have a birthday this month, you would first select the view 'Birthdays for Month', then specify the month. The member browse will then show all members who's birthday is in that month. Now you can report on these members in several ways by choosing the appropriate report, labels, or mail-merge from the reports menu.

Selecting Views

All of the views are listed in the Views menu on the left side of the main screen:
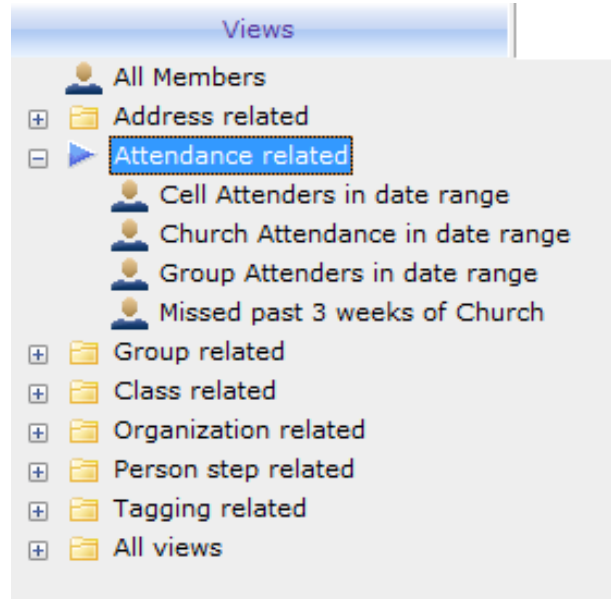
The views are categorized based on the information they relate to. For example, all the views having to do with "Attendance" are grouped in the "Attendance" folder. For convenience all views are also located in the "All Views" folder, in case you want to see all of the views together. To choose a view, simply double-click it.

From the Views menu, you can also get to a view quickly by typing the first few letters of the view name. This works best in the "All Views" folder.

If you can't remember the exact name of a view, you can search for a word in the view name, by hitting CTRL-F and typing in the word to search for.

You can also select a view from the main menu, by going to Views, Select different view, and choose the desired view. You can choose the current view, one of the saved views that are available to all users, or your default view, which is defined by your default view parameters assigned to your user id.

Most views have prompts built into them. These views will ask you for a view criteria such as 'what district', 'what member type', etc. By prompting the user for these values, you don't have to have a separate view for each district, or member type, etc…

Creating a New View

Excellerate comes with several common views built-in, but undoubtedly you will want to create your own. This can be done by using the Build new view button in the View Manager screen, or by Right-clicking in the Views menu on the left, and selecting "Add View".

When you build a new view, you are actually building a 'query' or an SQL statement for the access engine to process. Instead of having to write this statement by hand, the Build new view screen builds it for you by asking a few questions:

What module is this view for, and what kind of information should we get?
What do you want to call this view?
Which records do you want to select?
How do you want them sorted?

The first question is answered by choosing an entry from the picklist. For the member module, you have the following option:

Members
Members and their Addresses
Members and their Classes
Members, the Cell they're a MEMBER of and their Cell Activities
Members, the Cell they're a LEADER of and their Cell Activities
Members, the Cell they're an INTERN of and their Cell Activities
Members, the Cell they're a SUPERVISOR of and their Cell Activities
Members and their Meetings/Counseling
Members and their Organizations
Members and their Profile Codes
Members and their Member Steps
Members and their Contributions
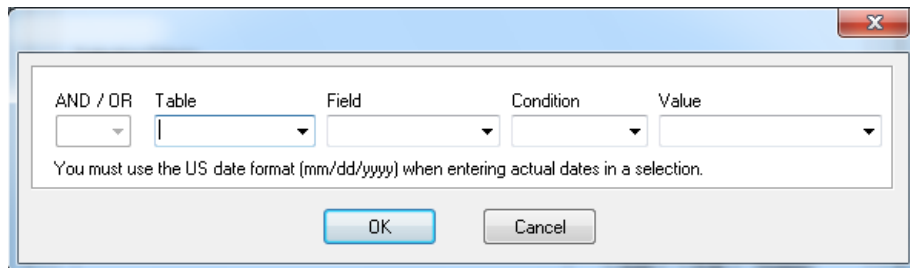Members and their Pledges
Members and their Church Attendance

Which item you choose depends upon what information you want to select, or sort on. For example, if you want to view members that live in 'Memphis', you would need to select on the city field of the member's address. Therefore, you would choose Members and their Addresses.

Use the Description field to name the new view. For example: Birthdays for Month. When describing your views, try to choose a name that starts with a word or phrase that indicates the selection criteria. For example, instead of saying Members with a Birthday in Month, use Birthday for Month. This way you will be able to quickly find the views relating to Birthdays. When you have a long list of views, this will be very helpful.

Also, when naming views that select on the division fields, instead of using the division name of District or Zone, use the div name of Div1, or Div2, etc… Excellerate will automatically replace Div1 with District, or whatever the Division 1 name is. This way, if you change your cell structure, the views will reflect the new names.

The third question is answered by adding selection criteria. To select members that live in Memphis, hit the Add button in the Selection section. You will see the following Selection Criteria screen:

We want all members where their City equals Memphis. In the Table field, choose Addresses, for Field choose City, the Condition is '=' and the Value would be Memphis. That's it! Hit, OK, then OK again, and you will see a list of members that live in Memphis. Now, a better view would be to ask the user for the city, so that you won't have to have several views, one for each city. To do this, instead of specifying Memphis for the Value, use the '? Ask user for value' option in the Value field. Now anytime you use this view, it will first ask for what city you are interested in.

The answer to the last question is specified in much the same way. Choose Add in the Sort section, and specify the Table and field you want to sort by. You can also choose Ascending or Descending sort order.

You will notice, that as your are answering these questions, the SQL statement is being built in the SQL window at the bottom of the screen. This is for those who have experience with SQL, and want to see the details of the view. This SQL statement can also be modified to create an Advanced View. See Advanced Views later in this chapter.

Once you've built your view, and are satisfied with it, you can save it for future use. Just choose the Save current view button, and the view will be saved in the list of saved views. This view will now be available for you and other users to use at any time.

Editing a View

To modify a new view that you've just created, use the Edit current view button. This will bring up the same screen that you used to build the view. To modify an existing saved view, use the Edit saved view button. Any changes to a saved view will be seen by all other users as well. You may want to make temporary changes to a saved view, maybe for a quick report. To do this without affecting all other users, you would first use the saved view. Now that the view is your current view, you would edit it like a new view that you just created. If you decide to keep this view, you can change the description, and save it just as you would a new view.

To delete a saved view, use the Delete saved view button.

Importing and Exporting Views

Since there could be a very wide variety of useful views that a church may desire, Excellerate allows you to import and export views.

If our support team emails you a new view, you will need to import it into your database. First save the attachment to your c:\excellerate folder. Then in Excellerate, go to your View Manager (F12), and use the "Import view from file" button. The view will now be saved in your database and accessible to all users.

Advanced Views

Advanced views are views in which the SQL statement has been customized beyond the basic capabilities of the view builder. To create an advanced view, you can start with the basic view builder screen, then modify the SQL statement in the SQL window to meet your needs. You should have a pretty good understanding of SQL before attempting to create or edit advanced views.

For views to be able to prompt the user for a value in an expression, use the parameter notation :Pn where n is a value between 0 and 9. For example to select Members by MemberType, and have the view ask for MemberType, use the following SQL statement:

SELECT DISTINCTROW Members.* FROM Members WHERE **(Members.MemberType = :P0)**

The :P0 will actually get replaced by the value you are prompted for. There is one special parameter call the Attendees Parameter :PA. This parameter prompts the user for the number of attendees in a group meeting. This value is usually compared to the Total field in the Cell Meetings Table for finding the groups with less than a certain number of attendees.

The following are some guidelines that must be followed when working with advanced views.

Always use uppercase letters for the SQL keywords. For example **SELECT, WHERE, ORDER**, etc…

Always place the ORDER clause at the end of the statement

Any expression containing a parameter must be enclosed in parentheses, and must have spaces around the operator for example:

SELECT DISTINCTROW Members.* FROM Members INNER JOIN MemberSteps ON
Members.MemberID=MemberSteps.MemberID
WHERE **(MemberSteps.Step = :P1)** ORDER BY Members.Lastname;

Remember Excellerate uses the Microsoft Access Jet Engine to process the SQL for the views, so a knowledge of Microsoft Access SQL will be helpful.
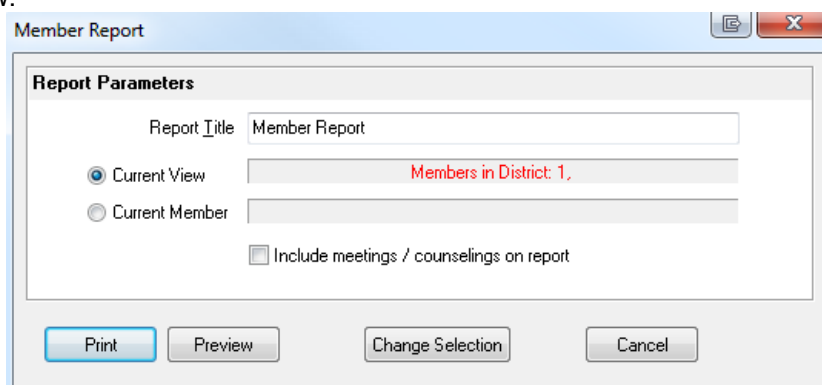
Reporting

Reports and Views

One of the most important parts of any church management system is its reporting. Excellerate uses a combination of views and reports to produce the wide variety of reporting for a church. Many of the reports are based on the current view you have selected. For example, the Members list and labels report can be used for group leaders, visitors, pastors, etc… Likewise, for a particular view, you could print a list, mailing labels or mail-merge with your word processor. This approach will provide many possible combinations of reporting.

For example, the Member Info Report first asks you if you want to report for the current member, or the current view:

This screen is showing that our current view is 'Members in District 1'. To print a detailed report for these members select the Current View choice, and hit Print. To print the report for the current member, select that option before printing. From this screen you can change the view for the report, by using the Change Selection button. This will allow you to pick a new view to use for this report.

You may also Preview a report before printing it by using the Preview button.

Saving Reports

From the report preview screen, you can save the contents of a report to a text file for use in another program. Choose the save button, select Text files in the Save as type field, then type the name of the file to save the report to.

Report Styles

Another valuable feature of Excellerate's reporting is the ability to select different styles for many of the reports. This allows you to print in a variety of formats from labels, to lists, to letters. For example, in the Member Lists/Labels report, you will see some of the following styles:

These styles can be completely modified by the user to meet their needs. You can modify an existing style, and save it as a new style. See the appendix for instructions on creating and modifying report styles.

Member Reports

Member Info Report

The Member Info Report produces a detailed member report, including all associated info tabs such as family members, profiles, groups, etc…

Member List/Labels

The Member List/Labels report is a report with different styles. With this report you can print a member list of names and addresses, mailing labels, etc… This report also allows you to exclude certain members from mail-outs. If you indicated that certain members should not receive mailings by setting their Mail Code to 'N', or some other value of your choice, you can specify not to report for that mail code here. Just specify the code to exclude from the report. If you are printing mailing labels for your members, and you don't want to send the same mail-out to the husband, wife, and children of a

family, you can choose one of the family options for your report. By choosing one of the family options, only one label per family will be printed. The way the label is addressed depends on the family option you choose. For example, you could choose Family – Mr. and Mrs. Last name, or The Lastname Family, etc…

Member Development Report

The Member Development Report shows your members' progress through the Member Steps, and Classes. It is useful in seeing how far along they've come in their development process. This report can be printed for the current member, or the current view of members.

Member Counseling/Meetings Report

The Member Counseling/Meetings Report lists details of your members' counseling sessions or meetings. These could be prior, or future meetings. You can specify a specific counselor if desired, and the meeting date range to print. This report uses report styles which can be modified to suit your needs.

Counselor's Report

This report is very similar to the Member Counseling/Meetings Report, except that the member report is grouped by member, and this report is grouped by counselor. This is helpful for a senior pastor to review the meetings of his counselors. Again, this report can be modified.

Visitor Report

The Visitor Report allows you to print a lists of visitors from both the member and pre-member module. This report allows you to select certain types of visitors, such as those who you wish to follow-up on from an information card, alter visit, etc… This report can also be limited to a specific date range, as well as a district, zone, etc…

Church Attendance Chart

The Church Attendance Chart prints a chart showing the members and their church attendance history in a chart to easily spot attendance trends. You can run this report for a specific view of your members, and for any date range of up to approximately six months.

12/19/99 6:29:23 PM   Page 1

New Life Cell Church
Church Attendance Chart
All Members

Member	Meetings:	Wk49 11/29	Wk50 12/06	Wk51 12/13	Wk52 12/20	Wk1 12/27												
Joe	Adams	X	X	X	X													
Mary	Adams		X		X													
Tina	Adams	X		X														
Tommy	Adams		X	X														
Peter	Johnson	X			X													
Adam	Jones		X	X	X													
Jimmy	Landry	X		X	X													
Terry	Landry			X	X													
Theresa	Landry	X	X		X													
Kristi	Maxwell		X	X														

Custom Reports

A custom report is a customizable report that is not constrained to any particular module or report type. These reports are similar to report styles, except that report styles are limited to the type of report they belong to such as a contribution statement, or member list. Custom reports can report on almost any part of the database, such as picklists, zip codes, members and pre-members combined. This is actually done by building a view and a style, and saving them in a custom report.
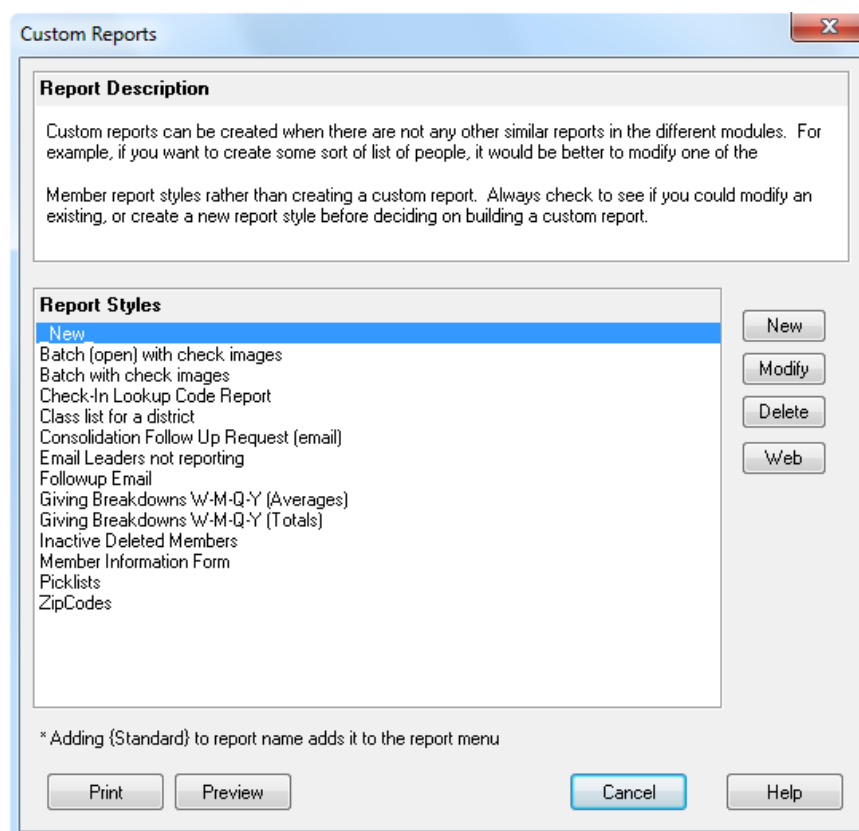
Custom reports can be created when there are not any other similar reports in the different modules. For example, if you want to create some sort of list of people, it would be better to modify one of the Member report styles rather than creating a custom report. Always check to see if you could modify an existing, or create a new **report style** before deciding on building a custom report.

Reporting

The Follow-up Email custom report is an example of how a custom report can report on a wider range of information. In this example, it is reporting on both members and pre-members combined, and then emailing the information to follow-up sponsors.

```
EMAILTO:joe.adams@church.com


Please follow-up on the following individual:


    Adam          West                     Home Ph:  111-222-4444
    100 Cordova Drive                      Work Ph:  111-222-3333
                                            e-mail:  adam@west.com
    Cordova          TN     38018

    Marital status: Married          Gender:

      Date name was received:   02/02/99
            Name came from:   Info card
            Responded for:
                 Comments:


Contacts   Date        Type          Action Taken / Response
------------------------------------------------------------------

    1      02/03/99    Phone         Interested

    2      _____  _____   _____

    3      _____  _____   _____

    4      _____  _____   _____
```
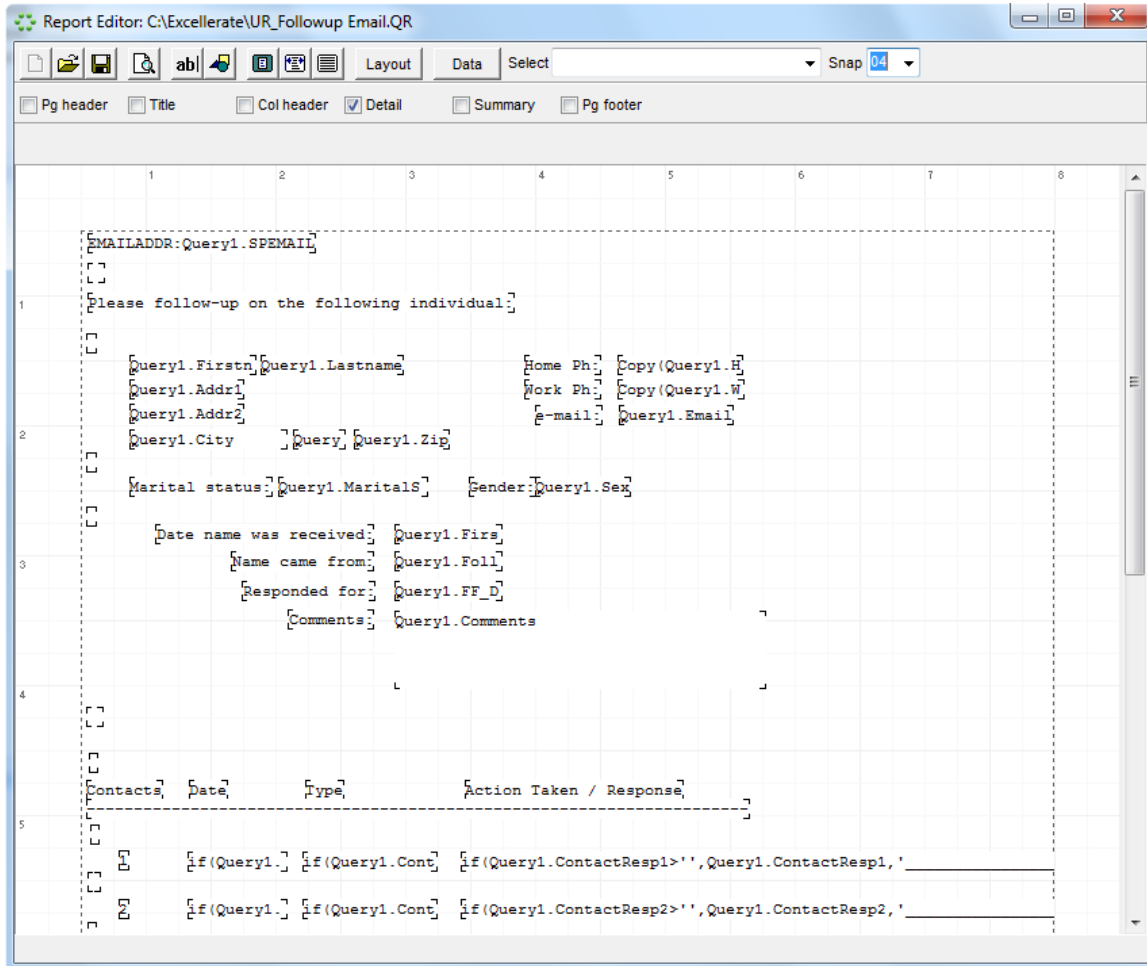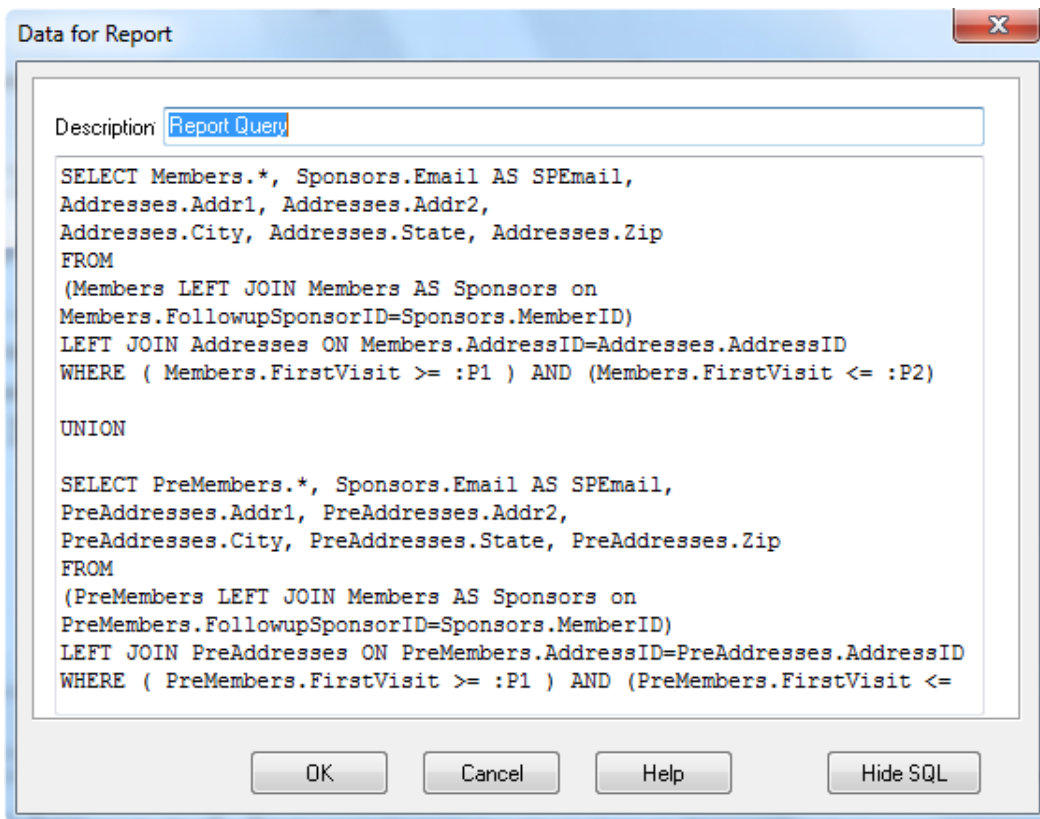
If we hit the Modify button, we can see the layout of the report:

You will see the labels and data fields that make up the report above. Hit the Data button to see the data that drives the report:

The data is basically an Excellerate view, or in this case an advanced view, which is actually an SQL statement. Most reports will not need an advanced SQL statement, and can be built using the view builder.
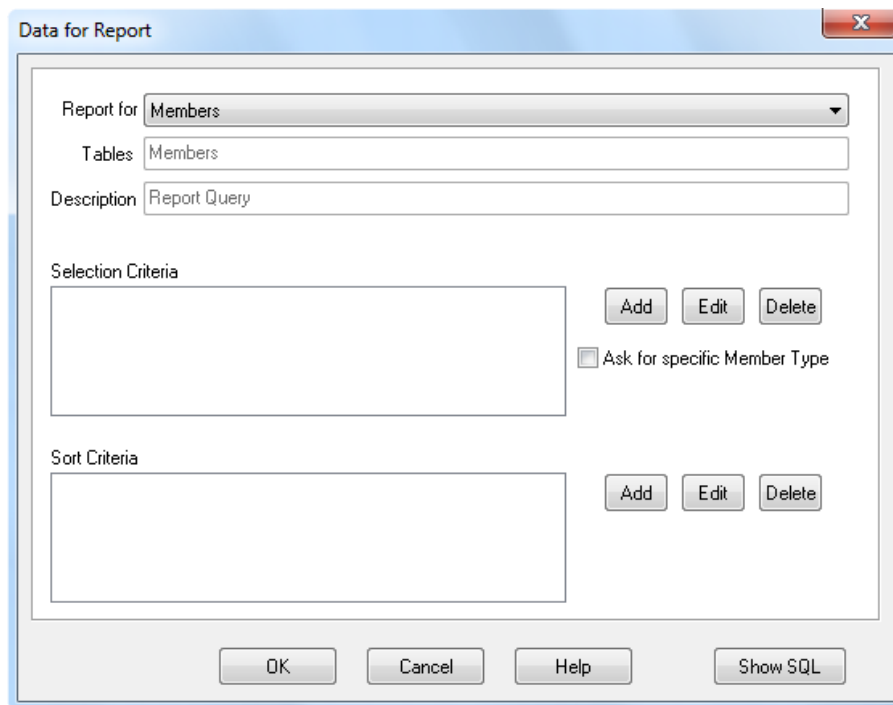
Creating a Custom Report

To create a custom report, choose the New button. You will then see the report editor screen:
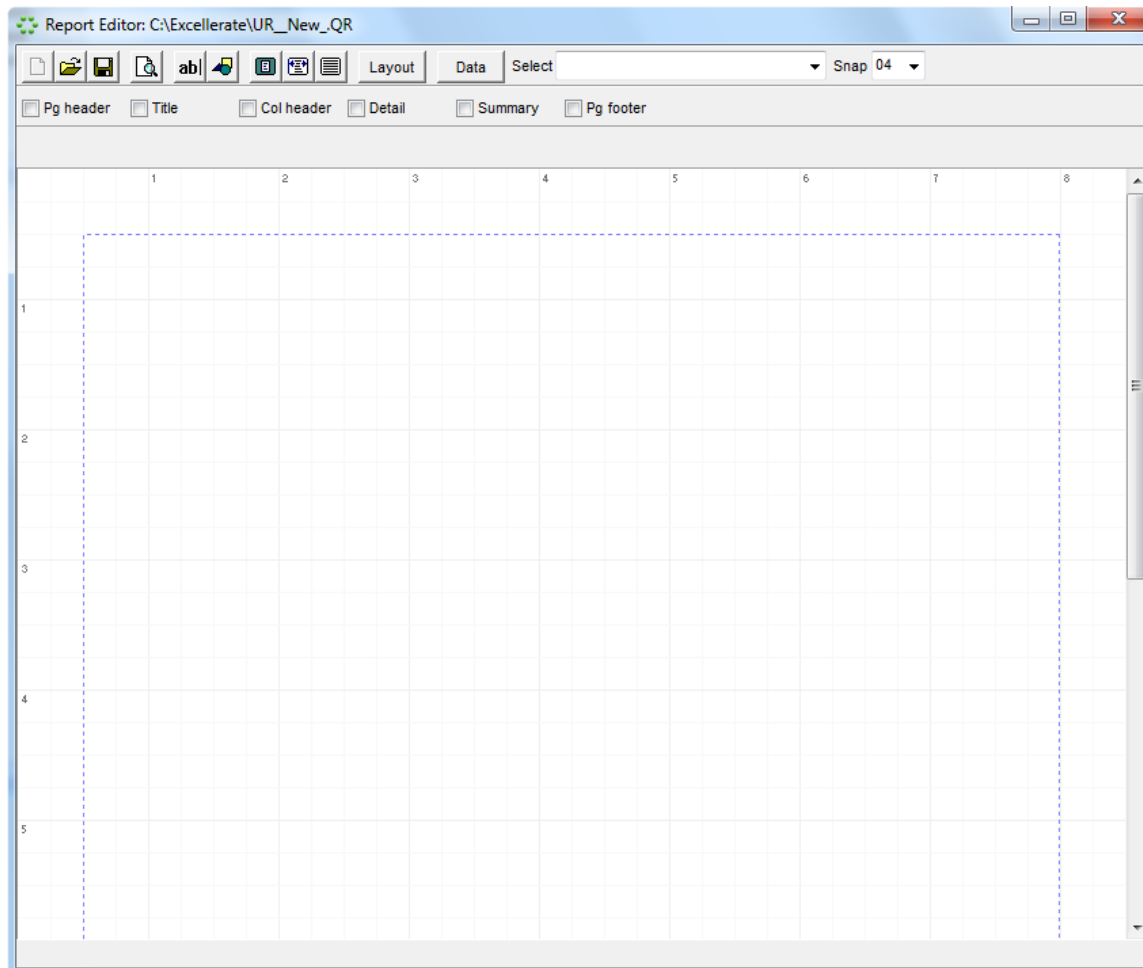
The only difference between the report editor for report styles, and custom reports is the Data button. This button allows you to select the data to be used in the report:

You will notice this screen looks very much like the build view screen. Basically you are doing the same thing, that is, building an SQL statement to produce the data necessary for the report. You can still use prompts to ask the user for certain values in selecting your data just as in a view. The report data criteria you build here gets saved with your custom report.

See the chapter on Views for more information on selecting data.

See Report Styles in the appendix for more information about designing the report content.

Mail Merge

Excellerate allows you to easily create mail-merges with your word processor. Basically, Excellerate will export your current view to a text file or access database. This file is then used by your word processor to merge with a document. When you select Mail Merge under the reports menu, you see a screen similar to the following:
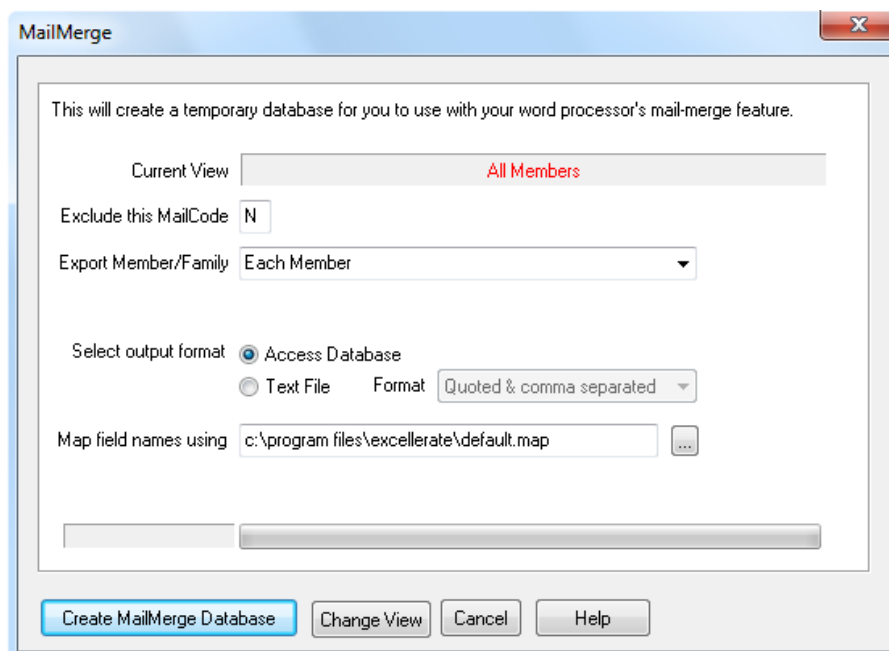
Since we are in the Member module, we have the choice of excluding certain mail codes, and we could limit the records to one per family instead of each family member.

You can also choose what format to export the data. Text format would probably be preferable.

When you hit Create Mail Merge Database, Excellerate will ask you for a filename, then export your view to that file. If you setup the path to your word processor in the program options screen, your word processor can automatically be loaded for you. See your word processor documentation on how to create a mail merge document, but make sure you choose the file that you just created from excellerate for your data source.

Utilities and Preferences

The following functions are available in the Utilities menu:

Change User Password

Your users may want to change their passwords occasionally. This can be done from the Utilities menu option. You must know your current password in order to change it. When entering a new password, you must enter it twice to be sure you typed it correctly.

Set Database Password

This option allows you to specify a password for the entire Excellerate database. This password will protect your database from being opened from another program, such as Microsoft Access, unless that user knows the password. When you set a database password, Excellerate will still be able to open the database without prompting your users for the password. Only when an attempt is made to open the database from any other program, will you need the password. If you are setting the database password for the first time, you will leave the current password blank, and only specify a new one. When you set a database password in Excellerate, it will be converted to all uppercase letters, so if you want to open the database with another application, remember to use all uppercase. When setting a database password, Excellerate makes a temporary copy of the database, so be sure you have enough disk space available to hold the temporary file. Also, no other users can be using Excellerate when you change the password.

Remove Members

When you delete a member in Excellerate, the member record is still in the system, and can be viewed by viewing the Deleted/Inactive members. This is so that history can be kept on these members, and so that you can recover the member if you deleted them by mistake. To permanently remove deleted members, you use the Remove Deleted Members option in the Utility menu. This option can not be recovered from, unless you have a backup, so use caution:
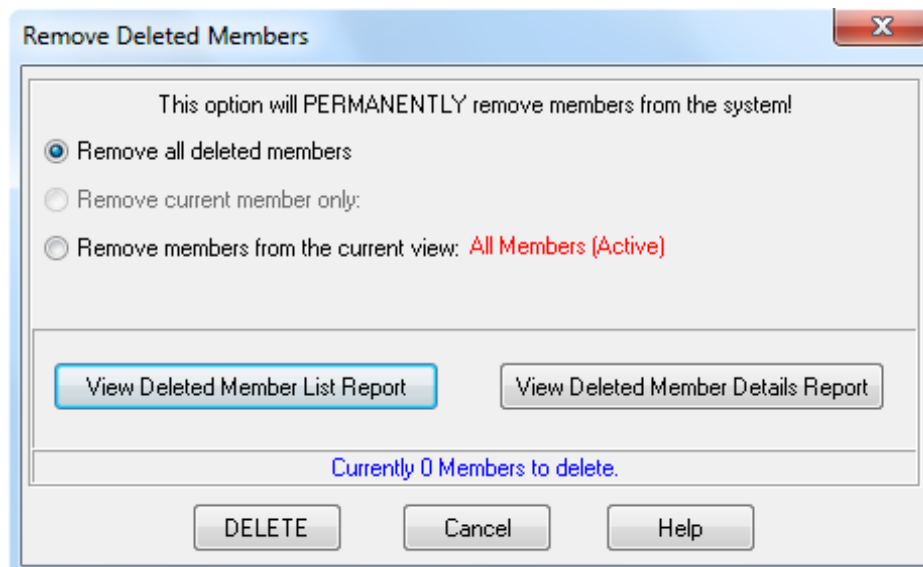
When using this option, you have the choice to remove all deleted members, or if the current member you were viewing has a Deleted status, you have the choice of removing that one member. This

69

option permanently removes the members, so you also have the option of printing out the records before removing them. You have the choice of printing a detailed report, a list, or no report at all.

You also have the option to remove all members from your current view, e.g. all members in the state of Texas. To do this you need to create a view of the members you want to delete. Select the Remove members from the current view: All Members option. We suggest that you select the option to print a member list or detailed member report before proceeding to delete that view. This process is irreversible so use extreme caution when selecting which group of members you want to delete.

When the Remove Deleted Members option is used from the Pre-Member Module, you have an added option of removing Pre-Members whose first visit to the church is older than a certain date. This allows you to remove people from the system who are no longer being followed-up on, or have no interest in the church.

The Remove Deleted Members option requires DATABASE security access to perform this action.

Re-Index / Compact Database

When Excellerate removes deleted records from the database, the space they took up on the hard disc is not necessarily recovered. If you have deleted a large number of records from the system, you could run the Re-Index / Compact Database utility option to recover that space. This operation requires DATABASE security level.

Remove Old Locks

Excellerate will periodically put locks on information that is being updated by users. In the event of a power failure, or some other reason for improperly exiting Excellerate, there may be a lock left open. If you receive a message indicating a user has something in use, and you know for sure this is not the case, you can use this option to remove that lock. This should rarely happen. This option requires DATABASE security.

Edit History Fields

The Member module can track changes to critical fields, and record those changes in the Member History associated information tab. You can specify which member fields get tracked this way by using the Edit History Fields utility. With this utility, you simply list the fields in the Member or Address table for which you wish to record change history. This option requires PREFERENCES security

Edit Required Fields

The Member and Cell modules can require a user to enter certain fields before saving a record. For example, it is a good idea to require a member's last name, first name, and member type when adding members. The list of fields that are required by these modules can be specified in the Edit Required Fields utility option. With this utility you simply list the fields from the Member, Address, or Cells tables that you want required. This option requires PREFERENCES security.

Edit Recommended Fields

Recommended fields are highlighted yellow in the various edit screens. This is a good way to notify data entry volunteers which fields you want to record if possible, but not require a value to save.

Create / Update Picture Thumbnails

Excellerate uses thumbnails, or small versions of your member pictures to display in the member and group modules. Excellerate will usually automatically create these thumbnails for you, but you may

need to create these initially if you are upgrading from an older version of Excellerate. This function can take a while to run if you have a lot of pictures, but it can run in the background allowing you to continue working.

Flex Fields / Flex Tabs

Note – Flex Fields and Flex Tabs can be an advanced concept, and you probably should contact tech support if you don't feel comfortable modifying your database structure.

Flex Fields are user definable fields that can actually be added to the Excellerate database. These fields can be added to the member, group, class, or organization edit screens, and positioned by simply dragging them into place. These fields are great for information that you want to keep track of that doesn't quite fit into the existing fields. You can also designate whether your new fields use picklists or not. Since these fields are added to the database, they can also be used in views, reports and even exported to your website for use with Excellerate's internet integration. Your flex field definitions can be imported and exported so that you can add new groups of fields that may be offered by our support staff, or even other churches.

Flex Tabs are new tabs that can be added at the bottom of the Member, Group, Class, or Organization edit screens. This allows you to create a whole new area for tracking information specific to your church. A tab could be created for individual fields, such as maybe a check-list of requirements for a joining a certain leadership program, or maybe a set of fields for tracking payments for a camp, etc.. A tab can also be used to track a list of records, maybe volunteer opportunities, etc…   In this case, you could actually add a new table to the database for tracking those opportunities.

Adding Flex Fields

To add flex fields, use the Utilities, Setup Flex Fields, menu option. You will see the following screen:

Hit the Add field button at the bottom of the screen to add a new field.

Module / Table specifies which module or which table to add the field to. You can choose members, groups, classes, organizations, or a new table that should be created for a flex-tab.

Tab order allows you to specify the order in which you tab through your fields. Enter 1 for the first field, 2 for the second, etc... You may leave this field blank.

For the name of the field, **all flex fields must start with FF_**, so if you may have a field like FF_SchoolName.

The type of field may be: Text, Number, Date, Currency, Yes/No, Memo, or Button. For Text fields, you will also need to specify the length (1 - 255) for the field.   For Button field, you specify the button command in the Default Value field.

If the field will need a picklist, choose the picklist type. Use 'F' for a forced picklist, which means that the entry must come from the picklist only. Use 'O' for an option picklist, which allows other entries besides the values of the picklist. Use 'N' for no picklist. Entries for these picklists can be added in the Options, Picklists menu just like other picklist values.

Default value allows you to automatically enter a value in the field when the record is created, or it can specify a button command. See the notes on this screen for details.

The next section allows you to specify a title to appear on the screen for the field, and positioning of the field. You may enter the X, Y, W (width), H (height) values for the field, or leave the X and Y blank. Once the field has been added, you can reposition within the screen later.

Indexed fields - If the field is going to be some sort of ID, or field the program will use for looking up the record, it needs to be indexed. You can choose ascending or descending.
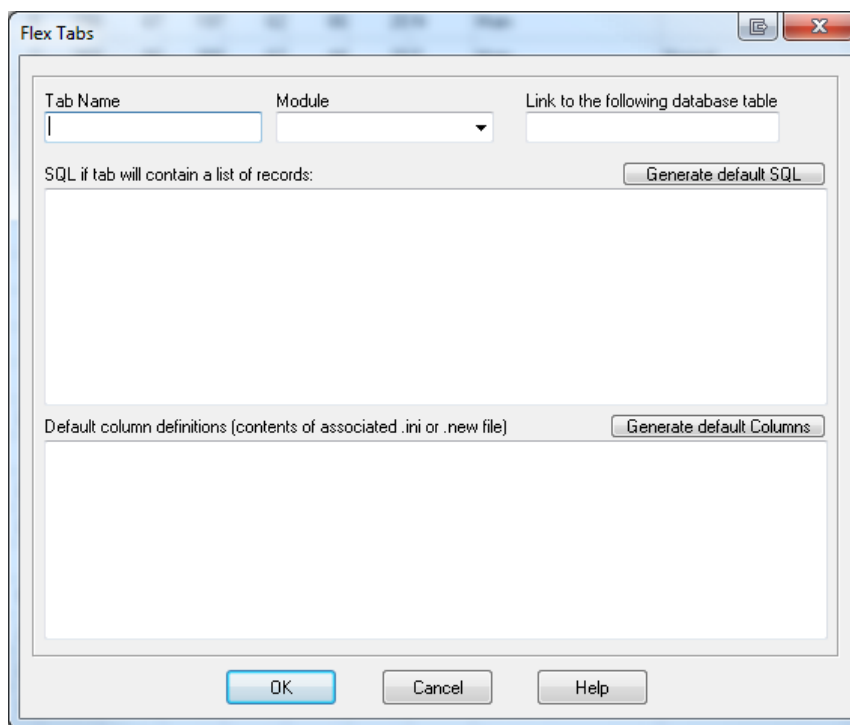
The location of the field specifies where the field will appear within that screen. For Member fields, they can be placed in the main screen, the Follow-up tab, or the Member step tab. For the other modules, you can only choose the main screen.

Display format allows you to choose how you want that field to appear.

If you wish, you may add titles without fields, or fields without titles. Just leave the title, or field blank. **The first flex field must have a title.**

Adding Flex Tabs

To add flex tabs, hit the Add Tab button on the top portion of the Flex Fields / Flex Tabs screen. The flex tab screen will appear:

Specify a the name for the tab, the module it should appear in, and if this tab is going to list records from a new table, specify that table name in the "Line to the following database table" field. This table should first be created in flex fields, by choosing *New Table* in the Module/Table picklist field. Preferably you would add all the flex fields for that new table first, then add the flex tab after.

Again if the tab is displaying a list of records, you will need to generate the SQL and column definitions for that table. The "Generate default SQL" and "Generate default Columns" buttons can do this for you, and then you can edit the results to suite your needs.

Deleting a flex-field

You may also edit or delete flex fields using the corresponding buttons. Remember, when you delete a flex field, the associated data in that field is deleted and can not be recovered.

Positioning Flex Fields

Once the fields have been added, you can go to the corresponding edit screen to re-position them. To position the fields, right-click on any of the flex fields. They will all turn red indicating they can be moved. Simply drag the field to the correct position. When all of the fields are in the correct position, right-click one of them to save. You can move several fields at the same time, by shift - right-clicking a field. Enter the number of fields to select, then drag them. Shift - right-click again and reset the count back to 1.

Exporting Flex Field Data

To export the data contained in flex fields, you must first modify the export maps such as website.map - for web integration, or default.map – for exporting to excel, etc… and add the flex field entries to those files. You can use notepad to edit those files.

Preferences

The preferences screen, found in the Options menu, allows you to customize the behavior of the program.

Church Information – Enter your church name and address information. This information will appear on reports and other printouts from the program.

Database Name – You can create several databases within Excellerate. This is useful if you want to have a training database separate from your main database, or for keeping multiple congregations separate form one another. The Database Name option allows you to specify which database to automatically open when starting Excellerate. Typically this would be your database.mdb located in the directory where you installed Excellerate, but if you are using the network version, this will be the database on your file server. (This is a local option that only affects this workstation)

Word Processor - If you would like Excellerate to automatically start your word processor for mail merges, enter the full path to your word processor. (This is a local option that only affects this workstation)

When starting Excellerate, open to – Specifies the module that you want to see first when the program is started. This may vary from person to person, depending on their job duties. (This is a local option that only affects this workstation)

Email Options

Excellerate has the ability to send email messages. You will need to have an SMTP outgoing mail server to take advantage of this feature. See the section on setting up email in the Internet Integration chapter of this manual.

Web Options

The web integration feature allows you to integrate data from Excellerate with your church web site. See the section on Setting up Web Integration in the Internet Integration chapter of this manual.

Advanced Options

The following advanced options can be configured

Allow changing member Divs if they are in a group – Normally a member's division codes are automatically determined by the group they belong to, or are manually entered when they are not in a group. This option allows you to modify a member's divisions even if they have joined a group.

Allow State/Province field more than 2 letters – this option allows entering full state or province names instead of the US 2 char abbreviations.

Assign follow-up sponsor's division codes to the new member when assigned – When a new visitor is assigned to a follow-up sponsor, Excellerate can automatically assign that visitor the same divisions as the sponsor who is following up on them.

Follow-up sponsor list generation – For large churches, Excellerate can automatically generate a list of possible follow-up sponsors that can be assigned to a new visitor based on certain criteria such as geographical location. This is done with two SQL statements which can be customized to work the way your church operates. The first SQL statement gets executed, but if it does not return any potential sponsors, the second SQL statement gets executed. There are several default follow-up methods which can be selected, or custom SQL can be entered directly.

Division / Structure tab

This section will allow you to specify your choice of names for your small group divisions, group interns, and group supervisors.

Divisions refer to the method you use to organize your groups. For example, you may divide your area or city into Districts, Zones, and Sections. For larger organizations, it may be necessary to label the divisions as Congregation, District, Zone, and Section, for example.

Enter your names in the four division fields starting with Division1 as your biggest division. It is not necessary to use all of the available fields for divisions. If your church has two divisions, simply leave the other fields blank.

Members tab

The Members tab allows you to rename the Member module to something else, say "Partners", for example. This will change all the screens, menus, etc.. to say Partners. You also need to specify the singular version of the word – Partner.

You can also specify the names for the fixed User definable fields. See User Definable Fields below.

Classes and Organizations tab

These tabs also allow you to rename the modules just like the Member and Groups tabs above, as well as specifying the user definable fields.

User Definable Fields – Although Excellerate is designed to track many aspects of your church members, groups, classes, and organizations, there may be items specific to your church that are not already included in the program. This section allows you to specify your names for the user-defined fields throughout the program. You may want to know if a member has any pets, for example, and could designate the Members User1 field as Pets. The user fields can be setup as regular text entry fields, or picklists. To specify that a user field is a picklist, select the appropriate picklist type next to the user field. For example, 'F' means forced picklists, or that the user can only choose a value from the picklist. 'O' means optional picklist, so the user can choose an item from the list, or type in their own. 'N' means no picklist. See Picklists under the Preferences menu option for setting up values for your picklists.

Users and IDs

As with the Preferences screen, this screen is located in the Options menu.

This screen allows you to enter all of the users of the system, their email address, their default view, and their levels of access.

Default User View

Users can be assigned a default view, which can narrow their view of the database to the area they're interested in. For example, your church may have several district secretaries, and each of them can set up their program to open to the view that they use the most, (such as District One for the District One secretary). When a user has a default view assigned, that becomes their initial view when they start the program. They can always choose another view at any time. If a default view is not specified for the user, then they will see all records when the program starts.

User Access

To allow or disallow users from viewing or modifying different types of information within the program, you assign them access codes. Access codes provide different levels of access to different areas of the program. For example, to allow a user full access to member information, give them a **D** for member access. The **D** code allows deletions and updates. The **U** code allows updates only, and the **R** code allows read only. A blank prevents access to that area of the program.

Utilities and Preferences

SUMMARY OF USER ACCESS AREAS:

ACCESS AREA	ACCESS CODE
Members	Member and related information
Groups	Groups and related information
Classes	Classes and attendees
Organizations	Organizations and their members
Financial	Member contribution information
Visits / Counsels	Meetings or counselings with members
User IDs	Maintaining User IDs
Preferences / Options	Program preferences, picklists, and defaults
Database Maintenance	Re-indexing or Compacting the database. Purging deleted members from system.
Cell Meeting Updates	Ability to run the cell meeting update
Report Modifications	Ability to change report styles
Saved Views	Ability to change saved views of the database
Send Emails	Ability to send emails

SUMMARY OF USER ACCESS CODES:

TYPE OF ACCESS	ACCESS CODE
Read-only	R
Update	U
Delete and update	D
Only allow seeing a member's last giving date	G (applies to financial area only)
No access	Blank

The following options require Delete and Update access in the financial area:
change accounts, reset or reverse-update contributions, end of period processing

Remember to change the MANAGER password at some point. This ID defaults to full access to the system for setting up users, etc…

Here's an idea… Consider setting up a "STAFF" User ID, without a password, which allows read-only access to Members, etc, This allows staff members to log on quickly to access basic information, such as phone numbers and addresses.

Importing and Exporting

Importing

When starting to use any new database program, it can be a time consuming task to hand-enter your data, especially names and addresses. Therefore Excellerate has provided a generic member import utility that will allow you to import member information. If you already have your member information in another database, you could export it from that database, and import it into Excellerate. To import members and their addresses into Excellerate, first export them from your database in such a way that there is one record per member that contains the member information and their address. This can be in an Access database, or text file. If using a text file, a quoted, comma delimited format is preferred. You may be able to use other formats such as tab-delimited, depending on how your database exports the information.

To import the data into Excellerate, use the Import Members utility under the File menu:
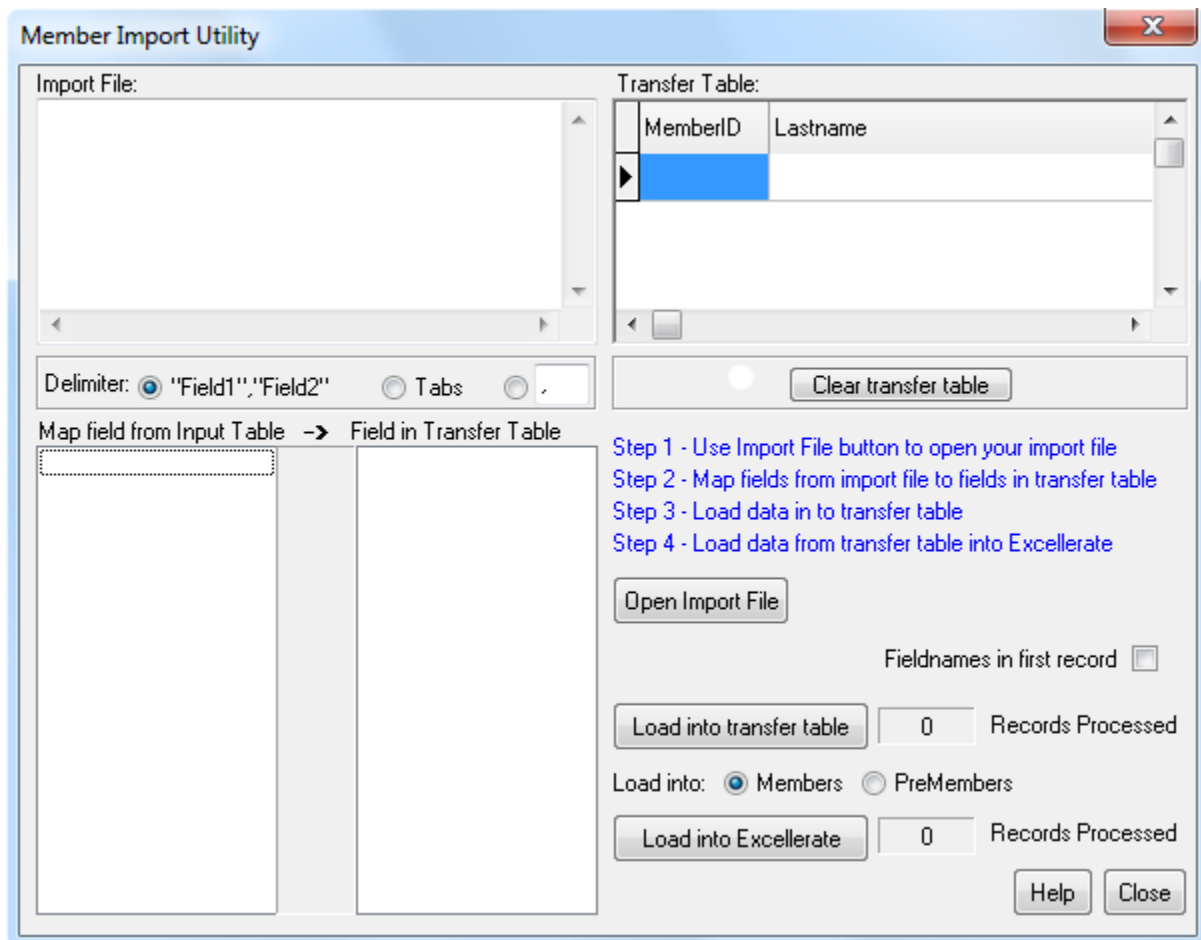
As you can see from the instructions on the screen, this is a four step process.

Basically you are importing the data from your file into an intermediate Excellerate file. Then you can view this data to be sure it imported correctly before loading it into Excellerate.

Step 1 – Use the import File button to open your import file. Once your file has been opened, Excellerate will display the fields in the field list, and the first few lines of data in the import preview window.

Step 2 – Map the fields from your import file to the fields in the transfer database. This is done by clicking the field in the import list, then finding the matching field in the transfer list, and clicking it. You will notice a line drawn from field to field showing the map. Continue with this until all desired import fields are mapped.

Step 3 – Load data into transfer table. This is done by using the Load into transfer table button.

Step 4 – Load data from transfer table into Excellerate. Once you've check the data in the transfer table window, and have verified that it imported correctly, you can then use Load the data in to Excellerate. You have a choice of loading the data into the Member or Pre-Member module. If you have a lot of data in your old database that needs cleaning up, you could transfer everything into the Pre-Member, then go through and move the current members into the Member module.

Note – If the data in the transfer table window does not look the way you want. You can clear the table and try again by using the Clear Transfer Table button.

Exporting

To export data from Excellerate, simply choose the module and view of the data you wish to export, and choose Export under the file menu. This will look similar to the Mail Merge screen since they both basically do the same thing. You can choose to exclude members with a mail code if desired, and you can specify the format of the export table as either text, or Access.

When exporting, you can choose a map file to use to map Excellerate fields to other names, or to exclude fields. Excellerate comes with a map file for exporting your members to Microsoft Outlook, then even to your hand-held computer or PDA!

To export contributions, see that section in the chapter on contributions.

Appendix

Reordering Supplies

When it's time to reorder labels or other supplies, go to **www.Excellerate.com/order**

On the top of that page, enter your Registration code and Zip code (or postal code). That will log you into your account and allow you to order supplies. You will do the same thing when your church grows and you wish to upgrade to the next member level, or if you wish to upgrade to use our full church management software.

Using Wireless Networks

Excellerate check-in stations can be run over some wireless networks, but due to the high demands of a multi-user database and the possibilities of dropped packets over wireless, we recommend using hard-wired network connections. If you must use a wireless network, we have found that some hardware configurations work better than others, so make sure you test your particular configuration before "going live" with the check-in stations.

Because of the possible dropouts with wireless, the check-in software has a feature where it can automatically switch over to remote operation, using a local copy of your database to ensure your check-in process continues. To enable this feature, you need to make sure your stations have an updated version of the "offline database" described in the offline mode configuration above. When a check-in station switches to remote operation, the attendance will be stored locally on that check-in computer. When you exit the check-in software, it will attempt to copy the attendance file to the transfer path (portable USB drive) allowing you to synchronize the attendance with your main Excellerate database.

Custom Welcome Screen

If you would like to add a customized logo, or welcome screen to the check-in software, you can create a logo.jpg graphic, and place it in the c:\program files\excellerate folder. The graphic will be displayed in the bottom half of the check-in software. The dimensions of the graphic depend on the screen size of the computer. For example, on a large display it might be 1920 x 653 pixels.

Configuring Fingerprint Recognition

If you've purchased the fingerprint hardware, you will need to install the fingerprint reader software and fingerprint server software. Typically you would install the fingerprint reader software on each check-in station, and install the fingerprint server software on your server. If you are only using one computer, you would install both the reader software and the server software on the same computer.

Before installing the fingerprint hardware and software, make sure you've installed and configured all of the other check-in software, and are sure everything is working correctly.

Installing the Fingerprint Reader Software

To install the fingerprint reader on your check-in station, choose the "Install fingerprint reader software" option from the installation CD. Continue through the installation screens accepting all of the defaults.

Connect the fingerprint reader to the computer. To verify that the fingerprint reader is installed correctly, start the check-in station, and go to the **options** tab. Choose "Use Fingerprint Reader". Go

ahead and enter the name of the server computer that will be running the fingerprint server software. If you are only using one check-in station, you can leave the server name as localhost.

Start the check-in station. If you don't get any error messages about the fingerprint scanner, everything is installed correctly.

When you re-start your computer, you may need to activate the license for the fingerprint reader, so go ahead and re-start now. If you see a license activation screen, you will need to insert the green USB lock, or enter your license number if you received one. If you are installing the reader and server software on the same computer, use the blue USB lock. You won't need the green one.

Installing the Fingerprint Server Software

To install the fingerprint server, choose the "Install fingerprint server software" option from the installation CD. Continue through the installation screens accepting all of the defaults.

You will need to activate the server by going to your windows Control Panel. Choose the M2SYS BioPlugin Server icon. Go to the License tab, where you can enter your license number provided, or insert the blue USB lock if you received one.

When you start your server, you will see a traffic light icon in the system tray. If the light is red, right-click it, and hit "Start fingerprint server". If the light changes to green, then back to red, contact technical support for help troubleshooting: 901-754-0315 or support@msdweb.com

If you have any trouble with your activation, please give us a call: 888-371-6878, or email: info@Excellerate.com

Using the Fingerprint Reader

The fingerprint hardware allows you to quickly identify an individual to the check-in system. In order for the system to know who you are, you need to assign a person's fingerprint to their corresponding record in the check-in system. You can use the child's fingerprint or the parent's. Fingerprints can be configured to check in an individual, or they can pull up the whole family on screen for you to select which members are checking in.

Assigning Fingerprints

When assigning fingerprints, the actual fingerprint image is never stored, nor can it be retrieved from the system. The software only records a mathematical representation of the key features of the fingerprint.

Fingerprints need to first be assigned to the actual person whose fingerprint it is, then you can specify which family members should be listed when that finger is scanned. So, if you want to use a parent's fingerprint, that parent must be in the database, you assign their fingerprint to their record, then you can select the children who will be checking in.

When scanning fingerprints, the system needs to get three successful scans. If you get a bad scan, just try again until you get three good scans. Try to touch the tip of your finger to the top of the scanner so the scanning window "sees" the middle of your fingerprint.

If you make a mistake, or assign the wrong person, simply re-assign the correct person.

Example – assigning a child's fingerprint

First pull up the child in the check-in system by searching for their name. Highlight their record and hit the "Assign" button, or use the F10 key. Now you will scan the child's finger 3 times.

When scanning children's fingerprints or people with small fingers, it is better to scan their thumb because of the bigger surface area. Adults can scan any finger, but usually the middle finger is the best since the index finger is more prone to scratches or injuries.

Each finger has a different print, so your members need to remember which finger they assigned.

After the fingerprint is assigned, a message will appear "Select the individuals below to pull up for this fingerprint. Then press OK." You will notice that the child is already selected, so you can just press OK.

Example – assigning a parent's fingerprint to pull up the children

Pull up the parent's record in the check-in system. Highlight their record and hit the "Assign" button or use the F10 key. Scan the parent's finger 3 times.

You will see the message "Select the individuals below to pull up for this fingerprint. Then press OK." Now select just the children of the family, and hit OK. Now when the parent scans-in, the children will be listed for check-in.

Note – if you are using multiple Excellerate databases for check-in, each database must connect with a different fingerprint server. You can't use two Excellerate database with the same fingerprint server.

Removing Fingerprints

If you want to remove a fingerprint from the system, highlight the person and hit "Assign", then cancel.

Scanner Programming Sheet

USB HID Keyboard Emulation

Erase All Rules

Begin New Rule

Send ascii key <#>

Send all that remains

Send extended key <Enter>

Send pause

Save Rule

CODE 39 ANY LENGTH

Beeper Volume Low