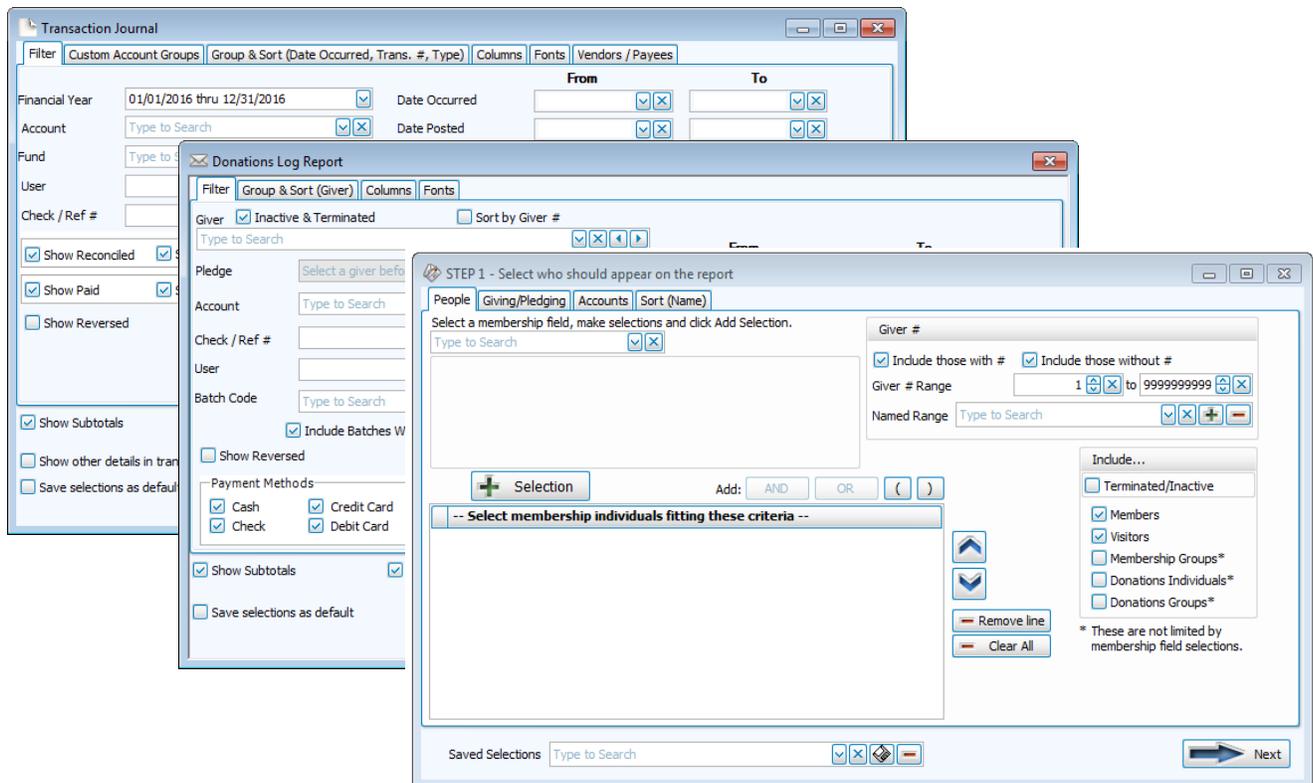


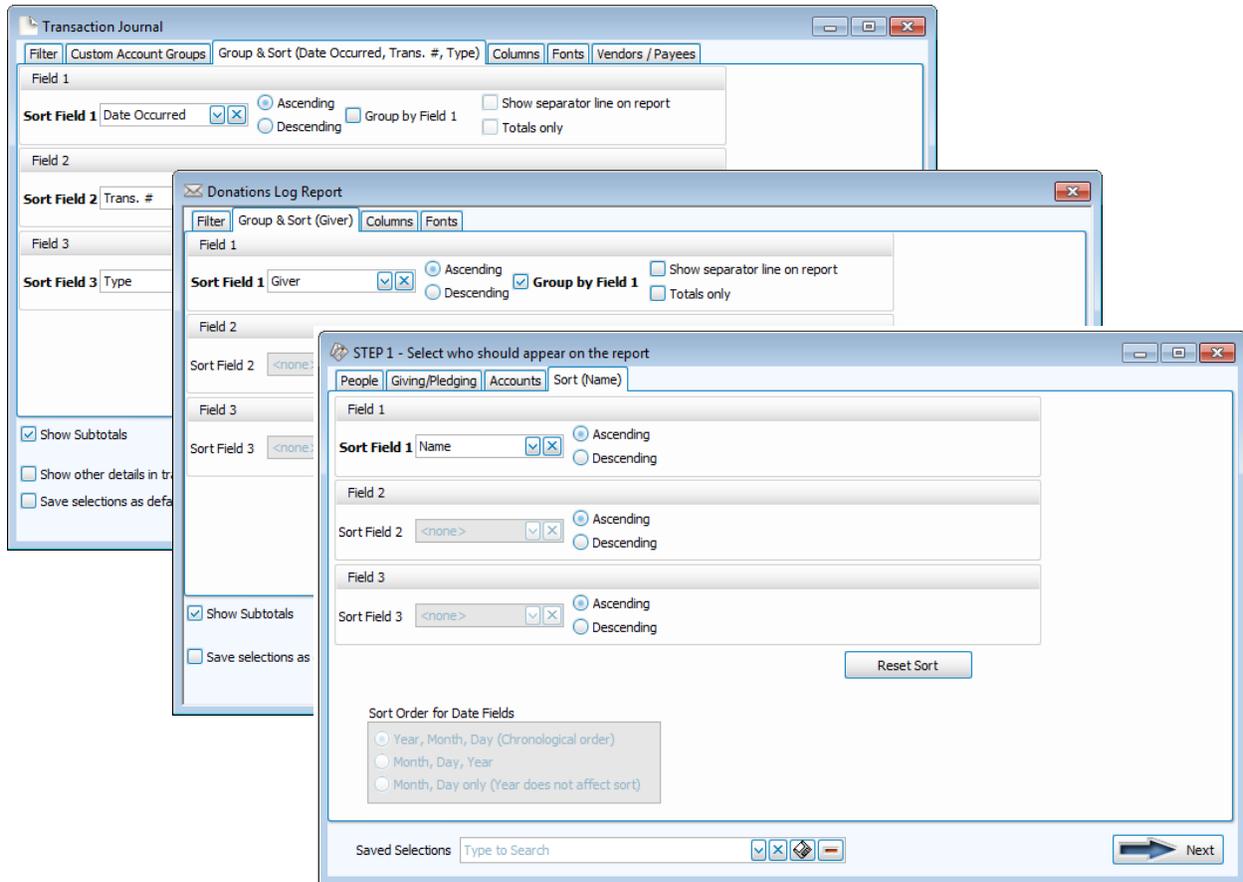


February 2016 Tech Tips

In Accounting, Donations, and Membership modules, there are many similarities between reporting areas. Knowing that some tabs work the same in multiple modules may help get the report you need. Let's look at some of the tabs available for reporting that function the same in each module, but just offer choices specific to that module. Below are screen shots from the Transaction Journal report in Accounting, the Donations Log Report in Donations, and the Reports/Directory/Export screen in Membership.



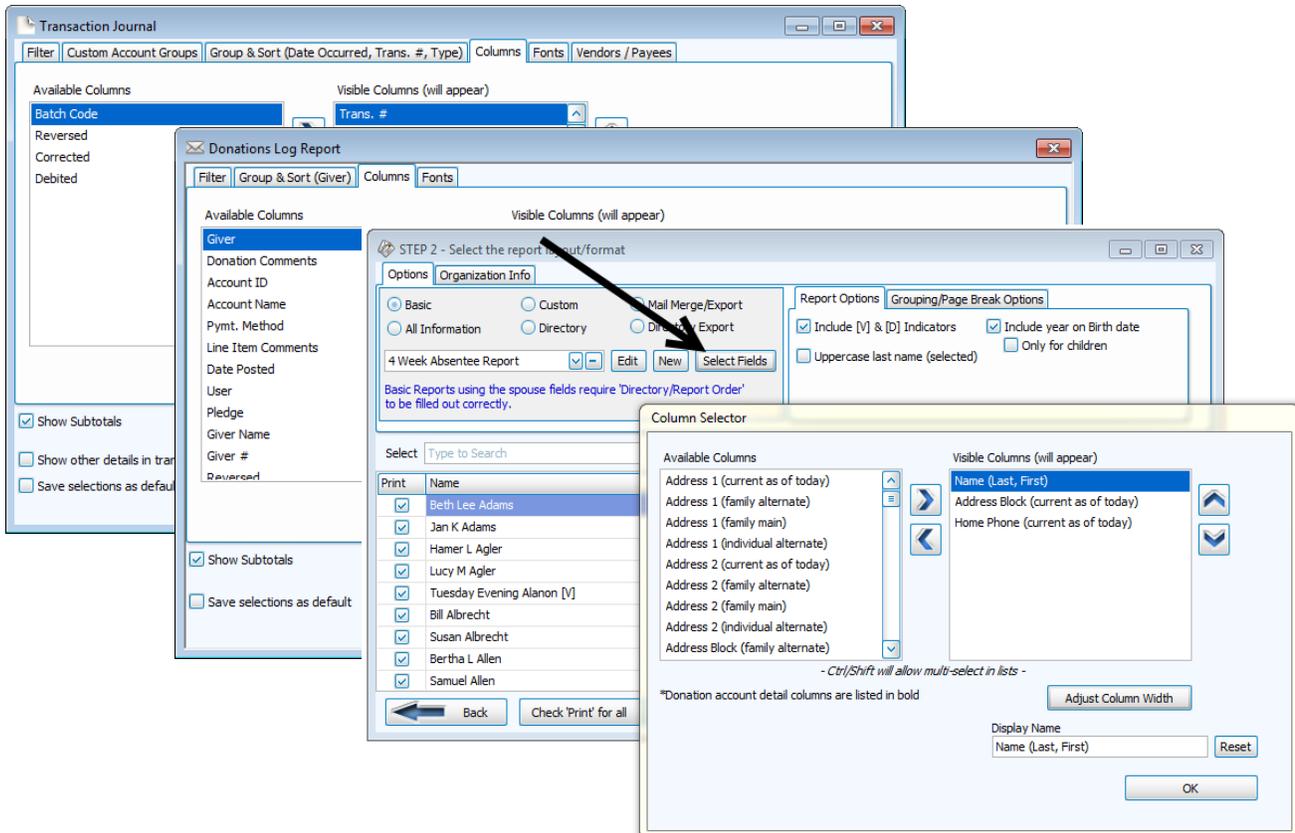
Notice the tabs across the top for each of the report screens pictured above. On these opening reports screens, the *Filter* tab allows criteria selection and date ranges. A *Sort* or a *Group & Sort* tab exists in all three modules.



The selections you make on the *Sort* tab or *Group & Sort* tab will determine the order of the information on the report. You can select by one or multiple fields, and can show *Totals only*. In each module, the *Sort* tab functions the same. You click the arrow in *Field 1* and select what you would like to sort by from the drop-down list. If your report is not sorted or not grouped as you wish, check the *Sort* tab to see what *Sort Order* was selected.



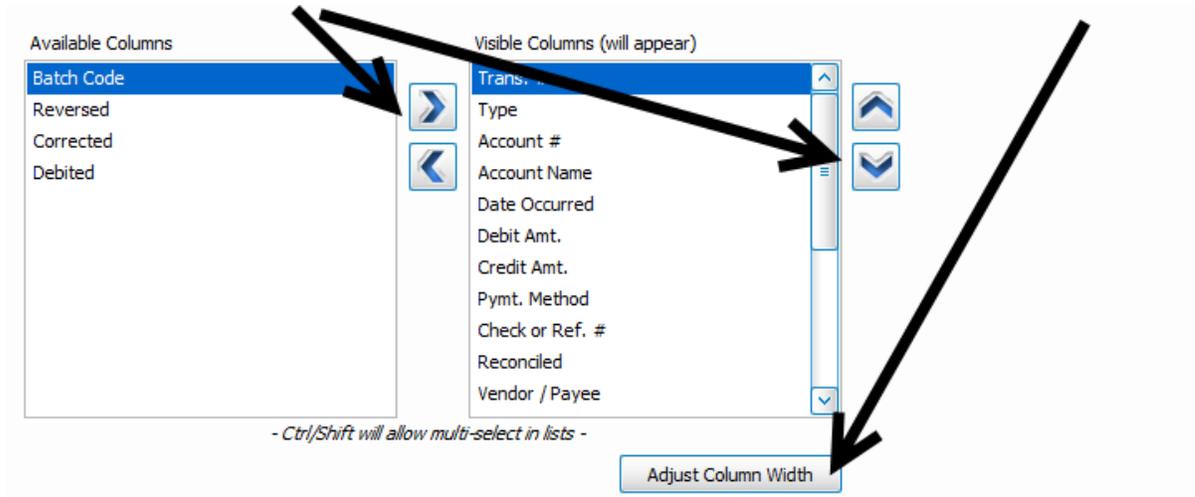
The *Columns* tab appears on most Accounting and Donation reports. Selecting *Columns* in Membership reports is a little different. Customization is found on the Step 2 screen. It allows selections including report options, layouts, and fields.



Sometimes, users wish to export the report data in order to remove or add information as needed. Using the *Columns* tab often eliminates this perceived data export need. Specific columns can be selected on reports by moving column names from the left (available columns) to the right (visible columns.) The order can even be revised by using the up/down arrows to move them up or down.



If the columns are too big and spilling onto a second page, it can be prevented by clicking the name of a visible column and adjusting the width of that column. You always have control over what is on reports and over the order in which it is displayed.



The article below is copied with permission of the writer - Deborah Ike of [Velocity Ministry Management](#). It originally appeared on the [Multibriefs Exclusive](#) website, Wednesday, January 20, 2016.

Can't Live with Documentation, Can't Live Without It

Nothing excites a room full of church staff members like announcing the idea to document their job responsibilities, right? Typing several pages of notes detailing how to reconcile the church bank accounts, enter new members into the database, or how to set up kids' check-in each week is a thrilling time for all.

OK, so perhaps not. However, it is important to have key tasks documented.

- What would happen if your finance office department leader suddenly resigned?



- Do you end up calling your children's director when she's supposed to be on vacation to ask how to deal with a check-in issue?
- Do you host the same event each year but keep reinventing the process due to a lack of documentation and faulty memories?

I've documented more than my share of tasks and, no, they're not exciting to create. They do, however, make great training tools for new staff members, prevent extra stress when you're filling in for someone, and can save you time in the long run.

So, how do you get your team to document their key job responsibilities without resorting to bribery? Here are a few ideas:

Tip 1: Teach someone else how to perform the task

It's never a good idea to have only one person on your team who knows how to complete key tasks, so cross training is certainly useful. While your kids director is showing another staff member how to setup check-in and troubleshoot issues, have the trainee document each step. This gets the process documented and reinforces the learning process as the trainee compiles the documentation.

Tip 2: Bring in a volunteer to document the task

Ask a detail-oriented, administratively-gifted volunteer to shadow you as you perform a specific task. She'll document each step and will likely ask clarifying questions along the way. This saves you from the tedious task of documentation while leveraging the skill set of a dedicated volunteer. Yes, some people do enjoy developing documentation. Find those folks in your congregation and turn them loose. Bonus tip: Send a hand-written thank-you note and maybe a gift card afterward.

Tip 3: Test the documentation

Once you have a first cut at documenting a key task, give it to someone who has never performed that task. This staff member should go through the process using the documentation, writing down questions or issues that come up along the way. Then, review that with the person who normally handles that task to update as needed.



Tip 4: Maintain the documentation

A document you park on a shelf or network server is useless. Decide on a schedule for reviewing and updating each document. You could review a few each quarter, when you

bring in new interns or new volunteers, at each software upgrade or other key event. Also, create an electronic filing system that makes it easy for anyone on staff to locate the documentation for each task (i.e., organized by department, by service or event type).

Documenting job tasks probably isn't at the top of your priority list. However, it would be if a staff member suddenly became unable to work or if you're trying to prevent issues that came up during the same event last year.

Start documenting the most critical tasks first and work your way down the list. It's worth putting in the effort now to prevent a lot of frustration and time later.

About the Author - Deborah Ike (formerly Wipf — just married in December 2014) is the president and founder of [Velocity Ministry Management](#): a company dedicated to vision implementation for church leaders.

Over the last 10 years, Deborah worked in the corporate arena to discover how to leverage business principles for ministry vision. She worked for Deloitte Consulting in their Strategy & Operations group and most recently, for Williams, as a project manager and risk manager.

Backing up

Don't forget to regularly make backups of your data. Backup as often as you do not want to re-enter data! [More information regarding backing up your data can be found here.](#)

