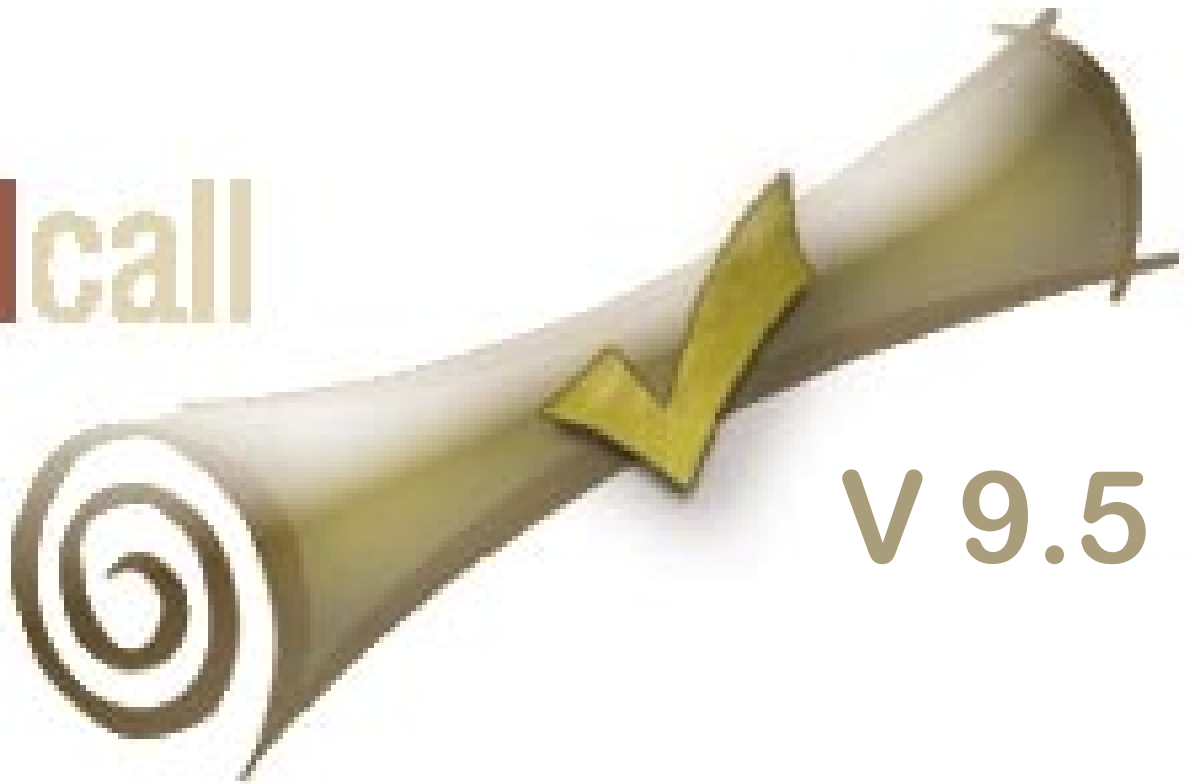


QUICKSTART GUIDE

rollcall



V 9.5

INSTALLING ROLL CALL

How do I install Roll Call on my workstation?

The single user version of Roll Call allows one user, on one computer to access Roll Call. For the single user installation, use the following instructions.

Mac users from the CD

To install Roll Call from the CD, simply place the CD in your CD drive. A By the Book disk image will be displayed on your hard drive. Double click on that image. There will be three Roll Call files: 1)Roll Call 2)Roll Call Client and 3)Roll Call Server. Double click on the Roll Call file. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

Windows users from the CD

To install Roll Call from the CD, simply place the CD in your CD drive. There will be three Roll Call installation files: 1)Roll Call 2)Roll Call Client and 3)Roll Call Server. Double click on the Roll Call file. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

Once the installation is complete, you will have a Roll Call icon on your desktop. To use Roll Call, double click on that icon. The first time you use Roll Call, the Set Up Assistant will be displayed. You may enter this information now, or press CLOSE to enter it later. Next you'll need to enter your license number. Select File>Enter License from the main menu. Enter the license number supplied on your invoice and press the tab key. The number of users and people records allowed will be displayed. Restart Roll Call and you'll be ready to begin.

From the download file

To install Roll Call from the downloaded file, double click on the Roll Call installer file you downloaded. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

Once the installation is complete, you will have a Roll Call icon on your desktop. To use Roll Call, double click on that icon. The first time you use Roll Call, the Church Constants window will be displayed. You may enter this information now, or press CANCEL to enter it later. Next you'll need to enter your license number. Select File>Enter License from the main menu. Enter the license number supplied on your invoice and press the tab key. The number of users and people records allowed will be displayed. Restart Roll Call and you'll be ready to begin.

How do I install Roll Call on my network?

A network installation of Roll Call allows multiple people to access the data. If you have a multi-user license, multiple users can access the data simultaneously. For example, if you have purchased a 3 user license, 3 users may access the database at the same time. If you have purchased a single user license, you may still install the network version, but only one person may access the data at a time.

First you must decide which computer will house the database. That computer will be your server. The computer you choose as your server should not be used for many other applications. For example, if your secretary's computer is used for creating the bulletin

writing letters and accounting, you probably wouldn't want her computer to be your Roll Call Server. Since the server needs to be running at all times, it would slow down her other work.

Next decide who will need to use Roll Call. Each of those users will need Roll Call Client installed on their computer.

Installing the Server

To install Roll Call Server from the CD, simply place the CD in your CD drive. For Windows users there will be three Roll Call files: 1)Roll Call 2)Roll Call Client and 3)Roll Call Server. For Mac users the By the Book disk image will be displayed on your desktop. Double click on that image. Next, double click on the Roll Call Server file. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

To install Roll Call Server from the downloaded file, double click on the Roll Call Server installation file. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

Once the installation is complete, there will be a Roll Call Server icon on the desktop. To start Roll Call Server, double click on the icon. An open file dialog box will be displayed, asking you to select your data file or to create a new one. For new installations, click NEW, then enter the name you wish for your data file, then click SAVE. The Roll Call Server window will be displayed. For users to work in Roll Call the Server must be running.

Installing the Client

To install Roll Call Client from the CD, simply place the CD in your CD drive. For Windows users there will be three Roll Call files: 1)Roll Call 2)Roll Call Client and 3)Roll Call Server. For Mac users, a By the Book disk image will be displayed on the desktop. Double click on that image. Next, double click on the Roll Call Client file. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

To install Roll Call Client from the downloaded file, double click on the Roll Call Client installation file. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

Once the installation is complete, there will be a Roll Call Client icon on the desktop. To start Roll Call, double click on the icon.

If this is the first time a client has connected into Roll Call, the Set Up Assistant window is displayed. You may enter this information now, or press CLOSE to enter it later. Next you'll need to enter your license number. Select File>Enter License from the main menu. Enter the license number supplied on your invoice and press the tab key. The number of users and people records allowed will be displayed.

GETTING STARTED

What needs to be set up before I begin working in Roll Call?

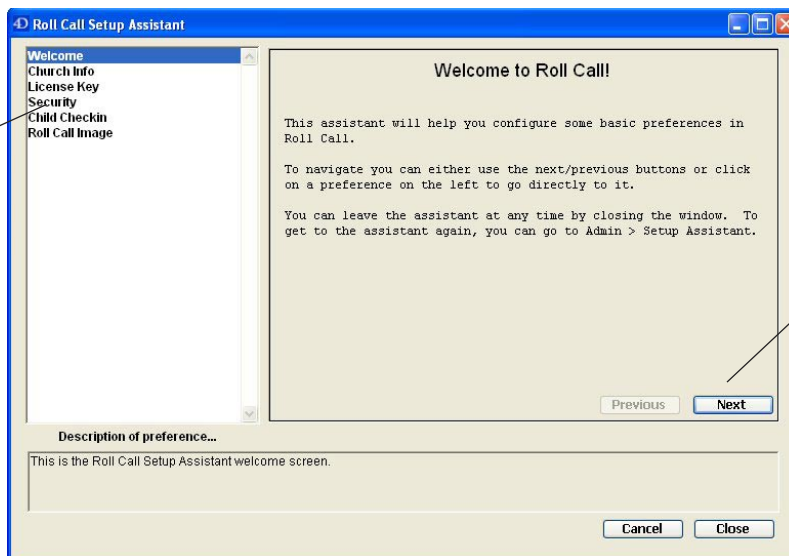
Church Information

You can enter the church address, phone and other demographic information through the Setup Assistant, or through the Admin menu.

The Set Up Assistant will be displayed the first time you come into Roll Call. You can also navigate to the Set Up Assistant from the main menu, by selecting Admin>Setup Assistant. To enter the church information from the Setup Assistant, click NEXT from the Welcome screen, or click on the link on the left for Church Info.

At a minimum, you'll want to enter the Church Name in this section. You may also wish to enter the church address information. The church address information is used as the return address on donation receipts and pledge progress letters. If you'd like to use the donations to budget report, make sure to enter your weekly budget. If you'll be using

Click on link to go directly to that section.



Click NEXT to navigate through each section

Security

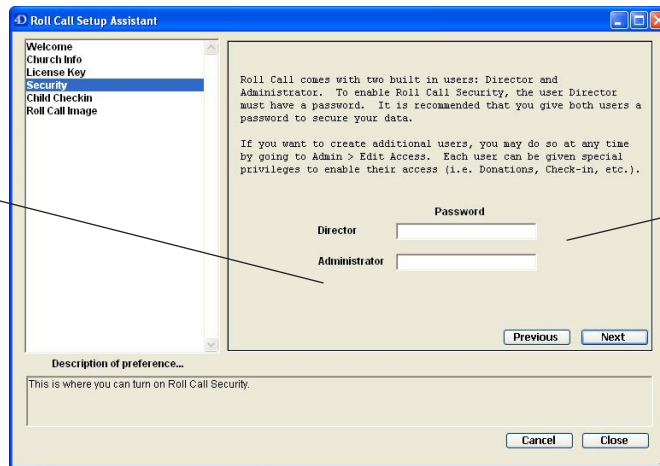
The security system (usernames and passwords) can be activated through the Set Up Assistant or via the main Roll Call menu.

To activate Roll Call's security system, you must provide a password for Director. Administrator and Director are two users that come with Roll Call. Do not delete these users. If you'd like to add additional user names, you can do that through the Administration menu in Roll Call.

Enter a PASSWORD in the field to the right of the Administrator and Director users. If you do not want to have to sign in, do not enter passwords here.

If you do not want to have to sign in... leave these fields blank.

NOTE: security is required for the child check in functionality



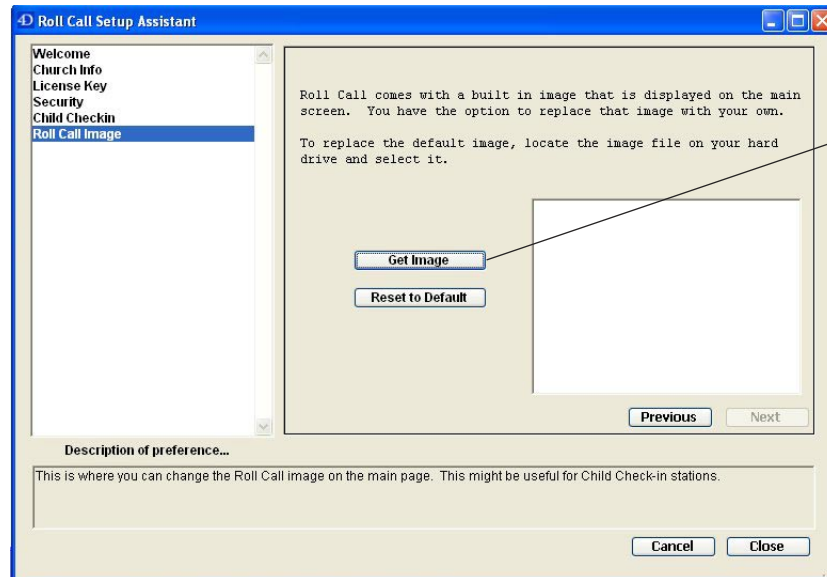
To activate the security system, enter a PASSWORD for the Director

Church Logo

Yes. You can import your church logo from the Setup Assistant. The Setup Assistant is displayed when you first start using Roll Call. You can also get to it by selecting Admin>Setup Assistant from the main menu.

From the Setup Assistant, click on the Roll Call image link on the left sidebar. Click on the GET IMAGE button. Then navigate the jpg or gif image file. Please note, Quicktime must be installed to view images in Roll Call. You can download Quicktime from www.apple.com.

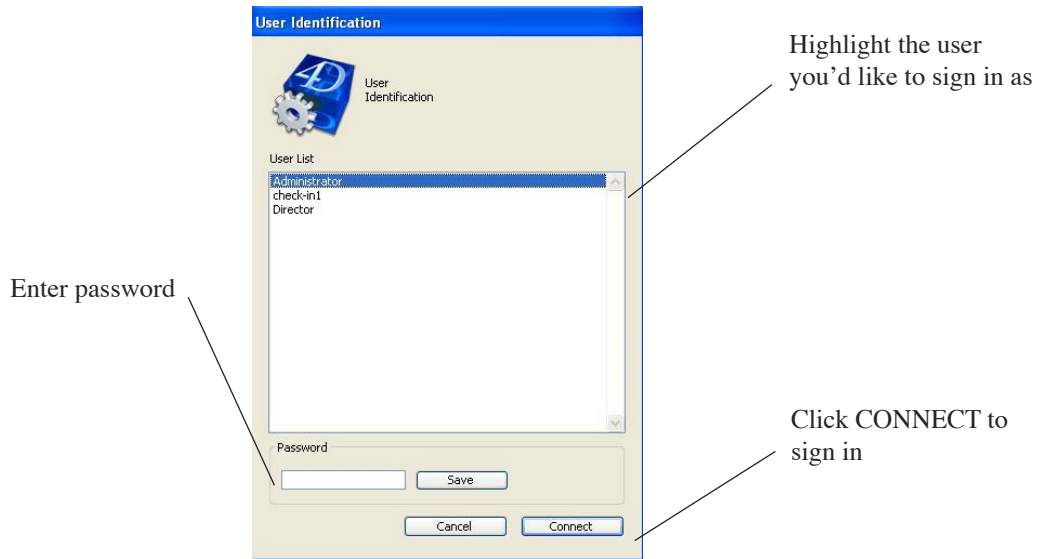
Click on Roll Call Image link



Click on GET IMAGE, and navigate to your logo

How do I log into Roll Call once I've activated the security system?

Once you enter a password for the Director, you'll be required to sign on using a user name and password to access Roll Call. This is the User Identification window that will be displayed next time you open Roll Call.



How do I get around in Roll Call?

Menu Navigation

The main Roll Call menu is found across the top left. Note the options: File, People, Letters, Donations, Pledges, Reports, Directories, Groups, Admin & Help. To view the choices under each menu, place the mouse on the desired option and click. To select a menu item, move the mouse to highlight it, and then click.

There are also shortcuts listed to the right of the menu choices. For example, on the Mac, you could hold down the CMD key and the F key to start the "Find Person" option. On Windows, you could hold down the CTRL key and the F key to start the "Find Person" option.



ENTERING PEOPLE

Enter the Head of Family

To begin entering people information, select People>Enter New from the main menu. The first window that pops up is the Family Position window. You'll need to enter the head of the family first.

Click on the type of person you are entering.

Type of Entry	Short Cut
Husband/Father	Ctrl D
Wife/Mother	Ctrl S
Male Youth	Ctrl Y
Female Youth	Ctrl L
Male Child	Ctrl B
Female Child	Ctrl G
Single Man	Ctrl M
Single Woman	Ctrl F
Organization	Ctrl O

Note short cuts.

Once you select the family position, the Enter People window is displayed. The *Title*, *Marital Status*, *Gender* and *Family Position* will be filled in based on the family position you choose. Next begin entering the basic information:

1. *First Name* - enter the person's full first name.
2. *Nick Name* - the nick name will default to the value entered for the first name. You

Note tabs for individual information.

General information

Click to save and enter new person from same family.

Click to save and start entering a new family.

can change this to the nick name if it is different than the first name. This field is required.

3. *Middle Name* – enter the middle name. This field is not required.
4. *Last Name* – enter the last name. This field is required. If you are entering a business, enter the business name in the last name field.
5. *Suffix* - enter the suffix Jr., Sr., etc if applicable.

6. *Spouse* - if the person you are entering is married, you can enter the spouses name here.
7. *Family Phones* - enter the home phone numbers here.
8. *Family and Individual Email* – enter the email address that will be used when sending an email to the family and to the individual..
9. *Association* – enter how this person is involved in the church. Are they a Member, Regular Attender, Visitor, etc.
10. *Unlisted* - if the family does not want their phone numbers listed in the directory, check this box.
11. *Birth Date* - enter the full birth date for the person.
12. *Family Number* – if you selected “automatic” from preferences, this number will be assigned by Roll Call. Otherwise, you may assign a family number manually.
13. *Envelope Number* – you may enter an envelope numbers here, or use the assign envelope number option under the Donations menu to assign numbers en masse.
14. *Badge No.* - if the family position is child, a badge number will be assigned. You may enter a different number if you’d like.

The next section you’ll want to complete is the address information.

1. *Optional Mailing Name* - The name entered here will be used as the mailing name on all correspondence and labels. For example, if you have a husband and wife Jim & Sue Smith, the default mailing label would be Jim & Sue Smith OR Mr. & Mrs. Smith. However, if you entered “The Smith Family” as the optional mailing name, the letters, labels and receipts would be addressed to “The Smith Family”
2. *Address, City, State and Zip*
3. *Shepherd Area* – if your church assigns deacons, congregational care pastors or other lay people to come along side families, you may indicate that here.
4. *Notes on Address* - this field was used in the past for driving directions. You may use this field for any general comments you’d like.
5. *Alternate Address* – use these fields if the family lives in a different location during the year.
6. *Effective Dates* – indicate the day and month this address become effective
7. *End Date* – indicate the day and month the family returns to their primary address
8. *Activate button* – you must click on the “house” button to activate the alternate address. If the alternate address is activated, and the current date falls within the effective dates, correspondence to this family will be addressed to the alternate address.

Other fields and buttons to note on the people screen:

1. *Add. Modified* – this is a system generated date, which indicates the last date the address was modified.
2. *Record Confirmed* - this date may be entered to indicate the date the person’s information was verified.
3. *Print Family button* – this button will kick off a report that outlines all information within the Roll Call database for this family.
4. *Copy Address button* - this button will copy the address into a buffer. You can then paste it into a different program, such as Word or other word processor.
5. *Send email* – use this button to send an email to this individual or entire family.
6. *Web Map* - press this button to connect to the internet and get driving directions to the address.

Enter Other Members of the Same Family

When you are ready to enter the wife or children of this family, click on the OK&SAME FAM button. To create a new family, click OK&NEW FAM. The Family Position window will be displayed. Select the appropriate family position for this person. The Title, Gender, Last Name, Marital Status will all have default values based on the family position you selected. The family phone, family email, family number and address information will already be entered based on the information you entered for the head of family.

The only general information you will need to enter about each family member is their first name, middle name, association, birthday, individual email and envelope number if applicable.

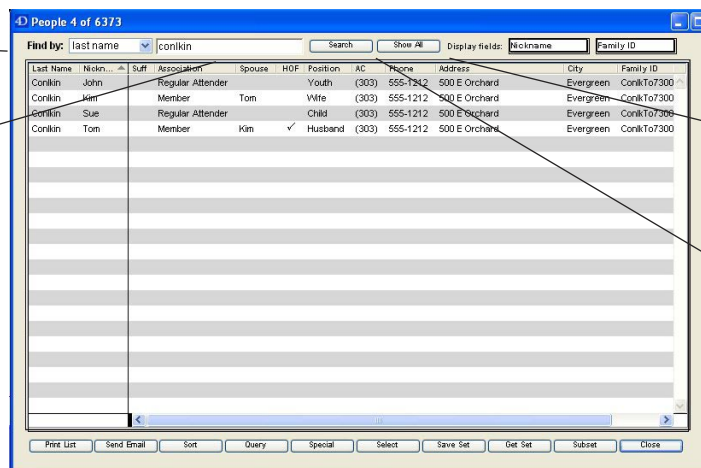
FINDING PEOPLE INFORMATION

To find a specific person or family, you can select People>Find Person from the menu or use the short cut CTL F or CMD F. The Find Person window will be displayed. Use the *Find By* drop down box to select your criteria type (last name, email, association, etc).

To find the person by name, enter the first few characters of the last name or the entire last name. Press the enter key or press the SEARCH button. A list of people with that last name will be displayed. Double click on the appropriate name to view their record. If you would like to scroll through the details for the people in the list, double click on the first person's record. Then from the People window,

Use the Find By drop down box to select the criteria type.

Enter criteria value or portion of value.



Click to view a list of everyone in the database.

Click to begin search.

press the arrows (above the CANCEL button) to scroll through the list.

To find a person based on email address, select email from the Find By drop down box. Then enter the email address or portion of the email and press SEARCH. To find a person based on city, select city from the Find By drop down box and enter the city name or portion of the name. Press SEARCH.

To view everyone, select People>Find Person. Click on the SHOW ALL button. A list of everyone in the database will be displayed.

View the detailed information

To access a person's record from this show all screen, double click on the appropriate record. Once you are in the People screen, you can use the arrow buttons to scroll through the people records.

ENTERING DONATIONS

If you will be entering donations for funds other than General, those funds must be established in the chart of accounts. If the chart of accounts does not contain the designations, you'll need to set that up first. See "Getting Started" for more details.

The general workflow for entering donations is as follows:

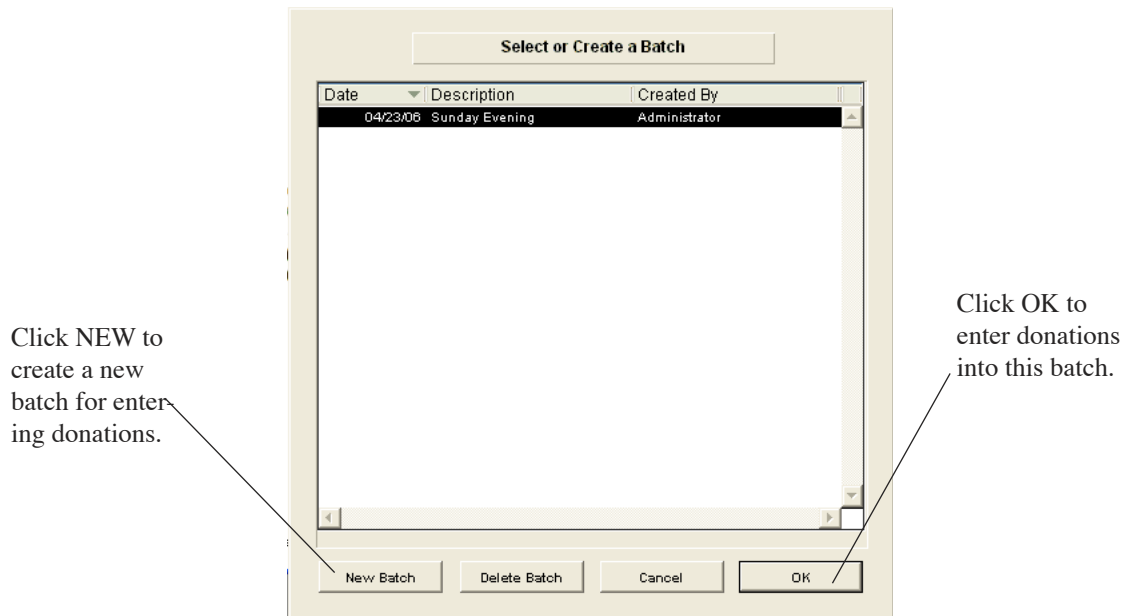
1. Create a batch.
2. Determine if you'd like to use the default "look back" feature.
3. Enter the specific donations.
4. Close the batch.

Create Batch

To begin entering donations, select Donations>Enter Donations from the main menu. A window asking for the date of the batch is displayed. You may enter the data entry date, or the donation date. This becomes the batch date and the default donation date for each donation in the batch. The batch date cannot be changed. The donation date can be modified.

If a batch does not exist with that date, a message asking if you'd like to create one is displayed. Answer YES. A window will be displayed to enter the optional batch description. This can be used to enter a short description. It could be used to indicate who is entering the batch, which service the donations were from or other descriptive information.

If you are appending to an existing batch (has the same date as entered above), a window with the list of all open batches will be displayed. Highlight the one you want to work in, and click OK.



Default look back

The next window asks if you want to default the donation to the person's last gift. If so, how far back do you want to look. Many times people give the same amount to the same fund each week or month. If you'd like to use their last gift as a default for the current donation, select Yes. Enter how many days you'd like Roll Call to look back to determine

Enter the number of days you'd like to look back, to create a default donation.

If you do NOT want to use the “look back” feature, click NO.

When you enter an individual’s name, and you selected this feature, the donation amount and designation will be brought into the donation screen. These values can be changed.

Enter specific donations

Next the Enter Donation screen is displayed.

1. Enter the *Last Name*, a portion of the last name or the *Envelope Number* of the donor. Press tab, or use the mouse to leave the field. A list of people with that last name is displayed. Double click on the appropriate person. Note their name and address are displayed on the upper right of the window.
2. If the person does not exist in the database, a message will be displayed asking if you'd like to create a new record. Click OK to begin creating a new person record. See “Entering Families” for more details.
3. Enter the *Donation Date*, if it is not the same as the batch date.
4. Enter the total *Amount* of the donation and press the tab key.
5. Enter the *Check Number*. The check number is not a required field. If you do enter a check number, the *Donation Type* will be set to check.
6. Select the *Donation Type*. This field will default to Cash but change to Check if a check number is entered. To select a different value, use the drop down to select.
6. Note the *Designation* in the lower box. This will be set to the default designation from your preferences or a prior donation if you used the “look back” feature. Modify this if necessary.
7. Click OK & Next to save the information then enter the next donation. Click OK & Same Donor to save the information, then enter another donation for the same donor. Click OK to save the information and return to the main menu.

Enter Last Name, then press TAB to see list of people.

Click OK to save your work and return to menu.

Click OK&Next to continue adding donation.

Close the batch

Once you've entered the donations and click OK to return to the main menu, a message is displayed asking if you'd like to close the batch. If you will need to add donations to this batch answer "Not Yet".

If you are ready to close the batch, click the CLOSE BATCH button. A list of open batches is displayed. Highlight the one you'd like to close then click OK. A window with all the donations in this batch will be presented for your review. If you'd like a print out of the detail, press the PRINT button.

The screenshot shows a window titled "Close Batch" with a table of donations and a summary section. The table has columns for Name, Total Amount, Des., Date, Check No., Person No., and Record No. The summary section includes fields for File Count, File Total, and Cash, along with a Designation Summary table.

Name	Total Amount	Des.	Date	Check No.	Person No.	Record No.
Smith, Joe - 100	200.00	▼	04/23/2006	123	1	201
O'Fallon, Jim	100.00	▼	04/23/2006		11	202
Baker, Shirley - 200	43.00	▼	04/23/2006		16	203
Smith, Sue	100.00	▼	04/23/2006		2	204

Batch: 52, Date: 4/23/2006, Created by: Administrator, Description: Sunday Evening

Designation Summary	
General	443.00

File Count: 4, File Total: 443.00, Cash: 243.00

Buttons: Done, Print, Close Batch

Annotations:

- Listing of all donations included in this batch. (points to the table)
- Summary of this batch. (points to the summary section)
- Click to print detail report of donations in this batch. (points to the Print button)
- Click to close this batch. (points to the Close Batch button)

If everything looks okay, press CLOSE BATCH. You will be prompted for the following:

1. Do you want to print the summary report? If yes, sort by Account Number or Fund Name.
2. Do you want to print summary to disk? This will allow you to create export files for Quick Books or MYOB. See section "How do I import/export to my accounting package".
3. Do you want to print a deposit slip?

Now your batch is closed. You can still edit donations that are in closed batches. You may not however, add donations to a closed batch.

CREATING GROUPS

Groups are defined by the following classifications:

1. **Campus.** If your church has multiple campuses or locations with different groups and classes at each site, you may want to define your groups at the campus level. The campus indicates which site or location the group stems from.
2. **Group Type.** The next level in the hierarchy is group type. The group type is the general classification of the group. Is the group a committee, a small group, a Sunday school class or a youth group? Your church defines these group types or classifications. Roll Call's default group types are Group and Class.
3. **Department.** The next level in the hierarchy is the department. The department is the area within your church that is responsible for overseeing the group. Children's Ministry, Congregational Care, Youth and Music are some common departments.
4. **Status.** The status indicates whether the group is active or inactive.

Every group that is defined in Roll Call must be assigned a Group Type, Department and Status. Status always defaults to active.

Enter general information

There are three ways to navigate to the Add a Group window:

1. Select Groups>Add Group from the main menu.
2. Select Groups>Group Maintenance from the main menu, then click on Add a Group from the Action Bar.
3. Select Add a Group from the Action drop down box, if you are in the Edit a Group window.

Once you are in the screen to add the group:

1. Enter the values for *Campus*, *Group Type*, *Department* and *Status*.
2. Enter the name of the specific group under Group Section. This name must be unique. Consider using the year in the name so you can keep historical information on your groups. For example, 2006-First Grade.
3. If the group has a leader, enter the last name in the *Leader* field. Press tab to view a list of the folks with that last name. Select from the list.
4. If the group has a co-leader, enter the last name in the *Co-Leader* field. Press tab to view a list of the folks with that last name. Select from the list.
5. Enter the *Location* of the group if applicable.
6. Indicate if the group meets weekly or randomly.
7. You may enter any comments or notes in the *Notes* field.
8. The *Start Date* will default to today's date. You may change it if you'd like.
9. Click OK to save the group and return to the Group Maintenance window.

Select Group Type and Department. Enter Group Section.

Note tabs for group related information.

Campus is only displayed if you've selected multi-user in preferences.

Select Actions here

Create sessions

Once you've entered the general information about the group, you'll want to indicate which days and at what times the group meets. The meeting days and times are called sessions in Roll Call. A group that meets weekly can have an unlimited number of sessions. A group that meets randomly does not have any sessions defined.

To create a session:

1. Click on the session tab, if sessions are not currently displayed.
2. Click on the ADD button. A row will be displayed, with a default of Sunday and time of 12 a.m.
3. Use the *Day of Week* drop down box to select the appropriate day.
4. Click on the clock icon to change the *Start Time*. On the Mac, move your cursor from left to right, first selecting am or pm, then selecting the hour, then selecting the minutes. On Windows, select the time in military time.
5. The *End Time* will default to one hour past the start time. If you need to change this, click on the clock icon. On the Mac, move your cursor from left to right, first selecting am or pm, then selecting the hour, then selecting the minutes. On Windows, select the time in military time.
6. Place your cursor under *Room* and double click to enter the room number of this group meeting.

Add Members

To enroll people into the group, press the Members tab. From within the members tab:

1. Click the ADD button or select Member Action>Add Member from the Action drop down box. A line is opened up and the cursor is placed in the *Name* field.
2. Enter the last name (or portion of the last name) of the person you want to enroll.
3. Press the tab or enter key. A list of people with that last name will be displayed. Double click on the appropriate name to select.
4. Tab across to enter any of the custom field data for this person.

Enter the Last Name of the Member.

Note Action drop down list.

Note Custom Fields that were defined in Member Preferences.

Click to Add Member

To enlarge window, click and drag on lower right corner.