

### FamilySuite Resources for the ADW Statistical Report

Our parish census and contribution system, ParishSoft FamilySuite, has a wealth of data for parishes to use in responding accurately and consistently to the ADW Statistical Report Survey. The table of contents below contains instructions to run FamilySuite reports to answer various questions on the survey.

### **Table of Contents**

A. How to create a Parish Statistics Report	1
Questions 12 & 14	1
B. How to create a member list for Widowers and Widows	3
Question 13	3
C. How to create a Kenedy Statistics Report	4
Questions 16 - 21:	4
D. How to create an ethnicity report	7
Question 22	7

For assistance with FamilySuite, please contact <u>Support@ParishSoft.com</u> or the Parish and School Financial Operations team: Carrina Bucknor, accountant, <u>BucknorC@adw.org</u> or Adrienne Willich, Executive Director, <u>WillichA@adw.org</u>.

# A. How to create a Parish Statistics Report

Questions 12 & 14							
ParishSOFT	Family Suite				HELP -	CONTACT - HOME	- SIGN OUT
Home Family Directory	Religious Ed. Offering	Ministry Scheduler	Tuition	Diocesan Development	IQ	Administration	
Family List   Member List   Sacra	aments 🔻 📔 Family Workgrou	ups   Member Workg	roups <b>R</b> e	ports			

From ParishSOFT **Family Directory**, navigate to **Reports**. From the **Report Type** menu, select **Statistics**. Then, from the Report menu, select **Parish Statistics** to display data:

-	ory Reports		St. Mar	y, Grosse Pointe	
elect Report - Paris	h Statistics	Parish Statistics			
eport Type	Report	Household Summary			
crament	Kenody Statistics	Registered 2359	Un Registered 4930	Not Specified <u>0</u> To	tal <u>7289</u>
atistics	Parish Statistics	Registered Household Stat	istics		
ensus		-			
OPR udit Contact Info		Households Without Childre	en	Household Member Statistics	
Idit Contact Info		Sing	_	Children (0 - 17)	
		Catholic Coup		Boys	<u>161</u>
		Interfaith Coup	es <u>250</u>	Girls	<u>158</u>
				Not Specified	0
		Households With Children		Total Children	<u>319</u>
			ile <u>59</u>	Total Souls Male	2811
		Catholic Coup		Female	3266
		Interfaith Coup	es <u>//</u>	Not Specified	12
				Total Souls	
				Total Sous	0000

To view the Parish statistics report, click the **Click Here to View Report** button.

The report displays in the Report Viewer. See the example below.

Iren: 964 885 250
964 885 250
964 885 250
964 885 250
885 250
250
1:
59
124
77
**

Note that the default date is as of the day the report is created. "Un registered" represents unregistered Household.

### **Printing a Report**

- 🥩 prints the entire report
- Sprints the selected page only.

### How to save a report (or export)

In the upper right corner of the Report Viewer toolbar, select the format for the report:

PDF 🗸	
PDF	
XLS	
RTF	
MHT	
Text	
CSV	
Image	

- 2. Click
- 3. Select Save File. Then, click.

# B. How to create a member list for Widowers and Widows

### Question 13:

1. From ParishSOFT Family Directory, navigate to the Member List

ParishSOF <sup>†</sup>	Family	Suite				HELP -	<u>CONTACT</u>	HOME	- <u>SIGN OUT</u>
Home Family Directory	Religious Ed.	Offering	Ministry Scheduler	Tuition	Diocesan Development	IQ	Administra	ation	
Family List Member List   Si	acraments 🔻 🛛 F	amily Workg	roups Member Worl	kgroups	Reports				

- 2. Click the Filter for Membership Status: <u>Registered</u>, Gender: <u>Male</u>, Marital Status: <u>Widowed</u> (see below).
- 3. Repeat with **Gender**: <u>Female</u>.
- 4. Click Apply

Member List											St. I	Mary,	Grosse	Pointe							•
▼																	Q, g	lear Sea	arch Re	esults	
A-Z A B	C D	E F	G	н	I	J	K L	М	N	0	Ρ	Q	R	S	т	U	۷	W	Х	Y	Z
0-9 0 1	2 3	4	56	7	8	9	Filter	Criteria: I	None	Filter (	Column	: Memb	er Last /	Ascendir	ng					Clea	ar Filter
10 records 🖂 📑	3	😼 🖳	70 🏚	Del	ete Se	elected N	1embers	Forg	et Selec	ted Me	mber								Quic	k Repo	orts 🔻
Member Last	△ Membe	er First	Far	nily La	st Na	me	Memb	er DUID	Rec	ister	ed F	Family	Group	)		Men	ıber E	-Mail			Mer
	Thomas		Filter																		cti
Aasen	Kathy		Please e	nter and	or sel	ect the (	criteria fo	searching	g. Only e	ntered	and se	elected	values wi	l be appl	ied to	by the	filter. N	OTE, cle	ar any i	/alues f	rom ctr
Aberg	JudyAni	n				-		ter' dropo			not wa	ant the									cti
Abney	Gregory	-	Memb	ership St Family G						*			Member	Envelop iden Nan		Any)				~	cti
			м	ember St		(Any Gr (Any)	oup)			* **			Md	Full Nan							_
Abney	Barbara			4ember 1									Family	Last Nan							cti
<u>Abney</u>	Alexand	ra		irst Langi										Addre	ss:						cti
<u>Abney</u>	Grant			Ethr	icity:	(Any)			~					a	ty:						cti
Abramovicz	<u>Robert</u>			Ge	nder:	Male			~					Sta	te:						cti
			Merr	ber Stre	ngth:	(Any)			-				Full P	ostal Co	de:						
			Men	nber Wor	k Grou	ips						H	ome Phor								
				] Bible St	udy									bile Phor							
				] Default										/ork Phor							
												Me	mber E-M	lail Addre	ss:						
			▼ Adv	anced	Optic	ons															
				Care	er Ty	pe: (An	y)			~		Show	Send No	Mail' Mer	mbers	(Any	)		~		
				Marit	l Stat	us: Wid	owed			~	S	ihow 'D	o Not Pu	blish' Mei	mbers	(Any	)		~		
					Religi	on: (An	y)			$\sim$		Sho	w Memb	ers With	E-Mail	(Any	)		~		
					Scho	ool: (An	y)			$\sim$				Age F	Range	:					
				Educati	on Lev	/el: (An	y)			$\sim$				Birth M	4onth	All			$\sim$		
				G	ad Ye	ar: (An	y)			$\sim$											
			We	dding An						$\sim$											
				Weddin	g Mon	th:				$\sim$											
			Exact	: Search:						$\frown$	\[										
									(	App	y 0	lear	Cancel								
			-								/										

5. Question 13 total number of records in the list.

•																						Q,	<u>Clear S</u>	earch Re	esults	
A-Z	А	в	С	D	E	F	G	н	I	J	к	L	м	N	0	Р	Q	R	S	т	U	v	w	х	Y	z
0-9	0	1	2	3	4	5	6	7	8	9	E	ilter Cri	iteria: N	lone	Filter C	olum	n: Membe	er Last /	Ascendi	ing					Clear	r Filter
10 rec	ords 🚿	<ul> <li>Ip</li> </ul>	👼		5	<b>e</b>	V 7	) (	Del	ete Sel	ected	Membe	ers	Forge	t Selecte	d Me	ember							Quic	k Repor	ts 🔻
M	ember I	Last	△ ►	1emb	er Fir	st	Far	nily L	ast Na	me	Me	mber	DUID	Re	gistere	d	Family	Group	•		Men	nber	E-Mail			Men
	hterber	g		)ean			Acl	nterbe	rg			7	71977	Ye	s		Active									Activ
<																										>
Page 1	of 1 (1	Record	ds) <	] 1 [																						
			nu	mbe	:he t er of on #:	reco	ords o	'n																		

# C. How to create a Kenedy Statistics Report



#### Setting Up and Viewing Your Organization's Kenedy Statistics

1. Navigate to **Reports** in ParishSOFT **Family Directory**. From the **Report Type** menu, select **Statistics** and then **Kenedy Statistics** 

Interfailth 0         Elementary Students 11         the fields in these fields           Select Filtering Options         Title 0         High School Students 26         the fields in these fields	inity Directo	ory Reports		St. Mary, Grosse Pointe	Ŧ
Select Date Range     Total 0     Put your cursor in the b       Start Date:     7/1/2019     Not Specified Marriages 0     Total K-12 37       End Date:     6/30/2020     Image: 6/30/2020     Image: 6/30/2020	Select Report - Ker Report Type Sacrament Statistics SopPR Audit Contact Info US Select Filtering Opt Select Date Range	Report Kenedy Statistics Parish Statistics See the date range (1/2020 – 6/30/2021 tions	Receptions Into The Church Infant Baptisms Minor Baptisms Adult Baptisms Not Specified Baptisms Received Into Full Communions First Communions Confirmations Marriages Catholic Interfaith Total	Census Summary Registered Parishioner Households 2260 Registered Parishioner Households 2260 Individual Catholics 5508 Number of Full Time Ministers Number of Full Time Ministers Number of Full Time Ministers Religious Educations Religious Educations High School Students 11 High School Students 26 Tatal K 12, 27	You can edit the values in the fields in these fields. Put your cursor in the box

- 2. In the Select Filtering Options section, select a date range (7/1/2020-6/30/2021) for the report. To do this:
  - Click the calendar button to open the calendar, as shown below.
  - Select the desired date range in the Start Date and/or End Date fields.

Select Report	- Ken	edy S	tatisti	CS					redy
Report Type		Re	port					R	eces
Sacrament Statistics			nedy state						
Census	-06	<		Jub	2019			>	30
GDPR		Sun	Mon	Tue	Wed	Thu	Fri	Sat	
Audit Contact In	27	30	-	2	3	4	5	6	
	- 28	7	8	9	10	11	12	13	
	- 29	24	15	36	17	18	19	20	
	- 30	21	22	23	24	25	26	27	
		28	29	30	31	. 1	2	3	
		-4	5	6	7		9	10	
Select Filtering Select Date Ran				Т	oday	]			
Start Date:	10000	2010							

• To view the Kenedy statistics report, click the **Click Here to View Report** button.

• The report displays in the Report Viewer. See the example below.

		<b>rrist The King Parish</b> 825 Victors Way Ann Arbor, MI 48108	
Kenedy Directory Manager Sta	tistical Rep	ort	
Date Range : 07/01/2019 - 06/	(30/2020		
Vital Statistics			
Receptions into the Church :		Census Summary :	
Infant Baptisms ( Ages 0 - 6 ):	68	Registerd Parishioner Households	6936
Minor Baptisms (Ages 7 - 17):	2	Individual Catholics :	11664
Adult Baptisms ( Ages 18+ ) :	1	Total Deaths :	1
Not Specified Baptisms :	0	Full-Time Professional Ministry :	
Received Into Full Communion :	0		
First Communions :	5	Brothers : Sisters :	3
Confirmations :	5	Lay Ministers :	2
Marriages :		Lay Ministers .	
Catholic :	0	Religious Education Statistics :	
Interfaith :	8	Elementary Students (K - 8):	788
Total :	39	High School Students (9 - 12):	6
Not Specified Marriages :	31	Total (Elem/HS) :	794

### Printing a Report

- 🥩 prints the entire report
- Sprints the selected page only.

### How to save a report (or export)

In the upper right corner of the Report Viewer toolbar, select the format for the report:

P	PDF 🗸	
	PDF	
	XLS	
	RTF	
	МНТ	
	Text	
	CSV	
	Image	

Click 🗐.

4. Select Save File. Then, click Οκ.

## D. How to create an ethnicity report

#### Question 22:



#### How to open a saved query in the IQ tab

Navigate to the **IQ tab** and then **Query Builder** menu. You can open any query that you saved or any query saved by other users that they designated "Global".

1. Click My Queries to open the My Queries window.



2. Type "Arch Dio of Washington" in query name and click Apply.

Query Tags:	q	Query Name:	Query	Owner:	Apply	
	×	Arch Dio of Washington			Clear	
	Query Name	Query Tags	Date Created	Date Modified	Owner	Global

3. Select the query and then click **Open**.

uery Tags:	V Query N	ame: Arch Dio of Wash	Query Own	ner:	Apply	Clear
	Query Name	Query Tags	Date Created	Date Modified	Owner	Global
Active	Arch Dio of Washington DC Statistical Report	Support	10/22/2018	10/22/2018	Admin, Diocesan	$\checkmark$

4. Details for the query are displayed on the Intelligent Query page: Enter the parish number

Intelligent	t Query										
+ New Query	💾 Save Query	💾 Sav	e Query As	🚔 My Queries	🖀 Recent Queries	🔖 Query Tags	Q Mor	del Properties			
Viewing Query	Arch Dio of	Washi	ngton DC	C Statistical R	eport					<b>Q</b> Qu	ery Properties
Column Picker				Result Column	ıs						
Appeal Type	pes		^	Expressio			Ti				
Batches				Members E	<u>Ethnicity</u>		Mer	nbers Ethnic	ity		
▷  Contributio	ons			Count of	Members Ethnicity		Mer	nbers Ethnic	ity Count		
▷ 🔄 Families											
▷ □ Funds											
▷ 🗌 Fund - Org	anization Summ	ary		fadd ann at							
▷ □ Members				[Add new col	umnj						
Ministry Sc	heduler			Query Conditi							
Organizatio	n				where <u>all</u> of the fo					+ {	+}
▷ □ Pledges					istered is equal to						
▷ 🗌 Religious E	ducation			and Members	Member Status is r	not equal to decea	ased				
Sacrament	s			and Organizat	tion Local Org ID is	equal to 33		~			Ο×
▷ □ SEP			~								
×				[Add new cor	ndition]		Г				
								Enter ID nui	the paris nber	h	

5. To make sure that the query results show **unique records only** (no duplicates), select the Unique Records Only checkbox at the top of the Query Results panel.



6. To run the query, click **Execute Query**.

Query Results - 0	Return All results 🗸	Unique Records Only	Execute Query	👌 📰 Query Results 🔻	2

7. The results of your query are displayed in the Query Results panel. The top right portion of the panel shows the number of records found that match your query criteria.

Query Results - 8	Return All results 🔽 Unique Records Only 🛛 Execute Query 🖀 Query Results 🔻 🖍
Members Ethnicity	Members Ethnicity Count
	0
Asian	11
Black	152
Filipino	1
Hispanic or Latino	13
Other	20
Two or more races	13
White	1369