



July 2007



**A WORD
FROM
THE
PRES...**

Weeding the Garden

We have a little flower garden at the front of the drive; annuals mostly, with a few perennials to anchor it from year to year. It's fun to visit the garden section at the local store each spring and pick out the colors for the summer. We always select at least some plants that are already in bloom so that we know what we're get-

ting.

When it's freshly planted it looks so bright and clean and cheerful. The fresh green leaves and flower blossoms are neatly framed by the freshly turned black earth. It issues its own greeting to passers by, and when visitors come we hope that it says "welcome" to them.

Then, sometime during the summer we take a vacation. It was early this year due to a family graduation. When I returned home I was greeted by the blooming flowers...amidst a small sea of weeds! And so I set out to carefully pluck each weed from around the flowers, working to restore some of the fresh spring-like beauty to our tiny garden. I know it won't look completely like the freshly planted spring garden again until another spring comes around. But if I keep working at it, I can make it look like a well kept summer garden.

It occurs to me that there is a lesson here for our company, Great Spirit Systems. We are no longer that freshly planted spring garden. I'm sure that we have grown a few weeds, in our software and in our company culture. As we approach our upcoming Customer Conference (August 24-25) about future directions for our software, it is just as important that we try to identify the weeds that have grown in us, so that we can carefully pluck them out and maintain a well kept product and company.

We need your help to do this. Regardless of whether you can have a representative of your conference at our upcoming customer conference, we need your suggestions. Tell us where you see a weed, so that we can work on getting rid of it. We won't hold it against you.

Please also tell us your ideas for the future of our products. We need to make sure that MissionBase, UMCDData, and whatever else evolves from them supports the ministries of your conference.

You may channel these messages through your conference attendee, or you may send them to me directly. Either way, we need to hear your thoughts. Thanks for your participation.

AI

Our Current Add-on Modules:

- Benefits (Pension [CRSP/CPP] billing, Medical, Flex, Life Insurance, Dental, Vision, & UMPIP billing)
- Event Registration
- Cabinet Decision Support
- Certified Leadership (Safe Sanctuary)
- Candidacy Process tracking
- Year-End Statistics (Tables 1,2,3)
- Church Remittance
- Online Local Church Leadership
- Online Statistics entry
- Online Event Registration
- Onsite & web-based training

For more information on any of these modules, contact lori@greatspirit.com

Module of the Month: Safe Sanctuaries!

We've recently completed a new Safe Sanctuaries module. Although we had a previous version, it had been written specifically for one customer and was not very flexible. The new module is designed to be configurable to your process. It allows you to track where each person is in the certification process, and when certifications expire. It can be linked to the Event Registration module so that when leaders are registered for camps and retreats, you can receive a report of anyone who is lacking certification. [Contact Lori](#) for more information on our Safe Sanctuaries module.

GSS Schedule

For your convenience, these are the dates GSS staff are "out of the office" and/or unavailable.

Dates Unavailable:

Bill Johnson: July 12-22
Lori Smith: July 18-25



LORI'S TIPS & TRICKS...

History Is For the Past!

There are times when I regret knowing what I know about the database, because sometimes it "tells me things," and I feel as though the database has "tattled" on you! This is the case with this next issue.

I have been assisting folks in numerous conference databases in the last month, and have lost count on how many times I've seen an appointment in Charges & Appointments with no default address set. It is just blank!



This is an absolute give-away every time that the user entered the appointment using the "Appointment History" screen rather than dragging & dropping the person into the Charge Tree in Charges & Appointments, which is the correct method.

This happens for a number of reasons. Some users may just find it quicker and easier, and it "seems to work." Some users may not have ever been trained on the correct way to add a pastor into a new appointment, and thought this was just how it was to be done. However, regardless of the "why," there are some real database issues that arise when this is not done correctly. So, I thought I'd help you, the user, understand what actually happens in the database, so you are aware of the potential dangers in using this technique for creating new appointments.

First, it is a dead-give-away when an appointment is created without using the drag & drop method because there is no default address! When an appointment is created by dropping a clergyperson into the Charge Tree, the information will not save until a default appointment address is selected. This is required because all the "clergy related to..." criteria in Label & Lists use this default. If no default is set, that clergyperson gets NO MAIL! There is not even a setting for an address in Appointment History, because it is just that... History. No one sends mail to where someone used to live.

Second, there is the case of the disappearing pastor. Appointment History is for entering historical appointments that may not already be listed for the clergyperson. So it allows the user to enter a charge name into a list of charge names. But every time a new charge is created from an realignment, a new entry is placed in the charge-list, as well. All stopped charges also remain in the charge-list since this is meant to facilitate entering appointment history. But there is a catch. If you try to create a NEW appointment here, there could be two or a dozen "Wesley" charges, and NO WAY to distinguish that you are not choosing one in another district, or that stopped 2-years ago! Thus the appointed pastor may never show up in the charge tree... or disappears!

Thirdly, all of the above impact increases significantly if your conference uses MissionBase for Benefits billing. If the pastor doesn't show up in the Charge Tree, then the compensation record cannot be entered correctly, and CRSP/CPD will not get billed for this appointment. This makes for very unhappy benefits officers!

All this to say, it is important to create an appointment the correct way... by dragging & dropping the clergyperson from the Pool into the Charge Tree in Charges & Appointments. If you are unsure on how to use this method, please don't hesitate to let me know and I'll walk you through it!

Lori Smith

Would you like a printable version of this newsletter? You will find it on our website, along with all the archive issues of *The Eagle Eye*!



FROM THE BULL PEN...



Medical Insurance Form and Setting the Payment Method

When entering a new person for medical insurance or when setting a person to a different billing entity, save all other medical insurance information about the person first. Do not set the payment method on the initial save. The save will automatically default to a "check" type payment when it saves the record for the first time. If you don't need to change the payment method from "check", then you are done. However, if you need to change the payment method to EFT or something other than check, click the payment method button in the grid to the right of the appropriate billing entity and then select EFT (or something else) as the payment method. I know this is a little cumbersome, however, before a payment method can be established, there must be an existing medical insurance record linked to that specific billing entity and person in order to set the payment method.

Bill Johnson

Tech Talk...

Update on MissionBase and Windows Vista

In the February and June editions of the Eagle Eye, I provided some information about MissionBase and Windows Vista. We are not yet supporting MissionBase on the Vista platform. However, we are actively testing MissionBase with Vista. The results have been promising, and we are hoping to announce a Windows Vista version of MissionBase in the near future. Please watch the Eagle Eye for future information and or announcements on this important development.