

Copyright© 2004 By Great Spirit Systems Corporation



MissionBase[®]

by Great Spirit Systems

Copyright © 2005 By Great Spirit Systems Corporation

USER GUIDE

Edition 2
edited For version 7.0.0.1360


Using the MissionBase User Guide


The MissionBase User Guide can be used online, or downloaded to your local computer. It is all in Adobe Acrobat (PDF) format requiring the Adobe Reader for viewing. If the Adobe Reader program is needed, download a free copy from the [Adobe website](#).

The entire User Guide now contains links throughout for quick access to the help area you are trying to locate in the document. Throughout the PDF documents, the “Find” (Ctrl + F) feature is available for entry of a keyword to quickly jump to the topic being searched.

Using the MissionBase User Guide can be done exclusively online, or the documents can all be downloaded from a link on our website, www.greatspirit.com, and used directly from your local computer without an internet connection. Note the “Key” below to know when an internet connection is required.

To begin, it is generally easiest to start with the Table of Contents (on the next page.)


You can always return to the Table of Contents from the  links throughout the various documents in the User Guide. All topics and subtopics in the Table of Contents are linked to take you directly to that section of the User Guide.

 After following a hyperlink to another page of the User Guide, you may return to your previously viewed page by clicking this link. If you scroll to another page after following a hyperlink, the last page accessed becomes your “last view.”

User Guide KEY:

Hyperlinks appear throughout the body of the User Guide in two formats. [Green text hyperlinks](#) require an internet connection such as the Great Spirit Systems website address which appears above.

All other links, which jump to a specific section in the same document or in another Acrobat document of the User Guide will appear as [Brown text hyperlinks](#). As long as all of the User Guide documents remain in the same folder on your local computer, these links will function correctly.

 Also new in this addition of the User Guide are active links directly to our MissionBase QuickTip sheets. These are simplified “how to” instructions for several areas of the MissionBase program. Just click on the “QuickTip” icon to access the QuickTip sheet for viewing or printing. This link also requires an internet connection.

NOTE:

Pages of the User Guide are also formatted for printing, and allow for a binding or 3-hole punch along the left margin, for users who prefer a paper copy rather than the electronic version.



Table of Contents

Using the MissionBase User Guide	ii
Introduction	vii
Terminology	vii-viii

INSTALLATION

System Requirements	1
Installing the Software	1
Starting MissionBase™	1
Logging On	1
Software Updates	2
Technical Support	3

OVERVIEW

The List Bar	4
HELP Module	4
SETTINGS Module	4
REPORTS, ETC. Module	5
FIND & EDIT Module	5
EVENT REGISTRATION Module	6
BENEFITS Module	6
PAL Module	7
STATISTICS Module	8
CHURCH REMITTANCE Module	8

COMMON PROGRAM FEATURES

Search Features	9
People, Churches, Institutions, and Committees & Groups Functions	9
Charges & Appointments Function	10
Using the Calendar Icon	11
Drop-down List Selections	11
Tabs	12
Symbols Used in MissionBase™	12
Database Synchronization	13
Using the Pencil Tool	14
Charge Tree Functioning	14
Setting the Charge Tree View	14
Using the Screens Tool (wrench)	15

SETTINGS MODULE

Manage Users Function	SE 1
Adding a New User	SE 1
Change Password Function	SE 2
Charge & App't Defaults Function	SE 3
System Options Function	SE 3
Pictures Maintenance Function	SE 3
Find a Person to Connect to a Picture	SE 3
Find a Church to Connect to a Picture	SE 4
Connecting a Picture to the Entity	SE 4
Connecting Multiple Pictures	SE 5
Deleting a Picture Connection	SE 5
Reset Data Function	SE 6




FIND & EDIT MODULE

ADDING NEW ITEMS

PEOPLE, CHURCHES, INSTITUTIONS, and COMMITTEES & GROUPS Functions	FE 1
Adding a New Person	FE 1
Adding a New Church	FE 3
Adding a New Committee or Group	FE 4
Adding a New Institution	FE 4
CHARGES & APPOINTMENTS Function	FE 5
Adding a New Category	FE 5
Adding a New Charge	FE 6
Adding an Existing Clergy to a Charge	FE 7
Adding a New Clergy to a Charge	FE 7
Adding an Existing Church to a Charge	FE 7
Adding a New Church to a Charge	FE 7

EDITING EXISTING ITEMS

PEOPLE Function	FE 8
Personal Information screen	FE 8
Contact Information screen	FE 9
Linking Shared Addresses	FE 10
Unlinking Shared Addresses	FE 10
Activities screen	FE 11
Adding an Activity to a Person	FE 11
Additional Screens for Clergy Persons	
Appointment History screen	FE 12
Adding Appointment History	FE 12
Clergy Status screen	FE 13
Adding a New Clergy Status	FE 13
Editing a Clergy Status	FE 13
Education screen	FE 14
CHURCHES Function	FE 14
Church Details screen	FE 14
Church Leadership screen	FE 15
Adding Church Leadership	FE 16

INSTITUTIONS Function	FE 18
Institution Details screen	FE 18
Address and Telephone screen	FE 18
COMMITTEES & GROUPS Function	FE 18
Committee / Group Details screen	FE 18
Committee / Group Members screen	FE 18
CHARGES & APPOINTMENTS Function	FE 19
 Charge screens	FE 19
Charge screen	FE 19
Charge Profile Composite screen	FE 19
 People screens	FE 21
Appointment screen	FE 21
Compensation screen	FE 22
Entering a New Compensation Record	FE 23
Entering Compensation by Church	FE 24
Entering Compensation by Charge	FE 26
Appointment History screen	FE 26
Pastor Profile screen	FE 27
 Church screens	FE 28
Church Charge Relationship screen	FE 28
Church Vital Statistics screen	FE 28
Church Profile screen	FE 29
CHARGE REALIGNMENT	FE 30
CLOSING A CHURCH	FE 31
TASKS AROUND ANNUAL CONFERENCE	FE 32
Prior to Annual Conference	FE 32
Immediately After Annual Conference	FE 32
On Moving Day or Immediately Following	FE 33

REPORTS, ETC. MODULE

REPORTS Function	RE 1
LABELS & LISTS Function	RE 3

CHURCH REMITTANCE MODULE

ENTER RECEIPTS Function	CR 1
BATCH & DEPOSIT REPORTS Function	CR 4
REPORTS Function	CR 5

BENEFITS MODULE

BENEFITS TREE Function	BN 1
 Employer Screens	BN 3
Med Ins/Flex Benefits/Life Ins Adoption Agreement screen	BN 4

Benefits Payment Methods and EFT Properties screen	BN 4
Setting the EFT Properties	BN 4
Setting the “Payment Method”	BN 6
Setting the “Exclude From Print” Options	BN 6
Church Details screen	BN 7
Entity Transactions screen	BN 7
TOOLS Function	BN 9
Create and Initialize New Year Benefits Files	BN 9
Carry Forward Prior Year Pension Balances	BN 9
Carry Forward Prior Year Med/Flex/Life Balances	BN 9
Set Pension Receipts Description	BN 11
Reset Current Data	BN 11
Set Default State	BN 11
Change the Date of a Benefits Batch	BN 11
Set Defaults For Benefits Exclude From Print Properties	BN 12

UTILITIES

GSS Zip Utility	UT 1
-----------------------	------

APPENDICES

APPENDIX A: Clergy Profile Report
APPENDIX B: Cabinet Profile Report
APPENDIX C: Batch Listing Report
APPENDIX D: Remittance Deposit Report (Deposit Journal)
APPENDIX E: Churches By Percent Paid Report
APPENDIX F: Church Statements
APPENDIX G: District Statements
APPENDIX H: Giving Report
APPENDIX I: Receipts By Church Report
APPENDIX J: Benefits Transactions Report

Introduction

MissionBase™ is a computer database program designed for the purpose of helping the staff of religious denominational offices to do their job. It is written generally for judicatory offices, such as the conference, diocese, synod, and presbytery or similar regional office within a religious organization.

The software supports the maintenance of professional clergy data and records, church committees and other groups, local church leadership, and a host of functions that dependent upon the accurate maintenance of this data. These functions include mailings, informational reports, accounts receivable, event registration, the assignment of clergy to ministries, and many others. Many of the required records and reports of a denomination can be maintained and printed from MissionBase™.

Great Spirit Systems Corporation (GSS), the author and owner of MissionBase™ and Mission Southwest, its predecessor, is a small software firm dedicated to the task of serving the needs of these same offices. We do this through our software, as well as through more general computer and consulting services.

Terminology

For the purposes of this user guide, common computer terms, and terms specific to the Mission Base™/Mission Southwest™ software, have been defined to clarify meaning as they are used throughout this text.


Child grid a grid, or table, of information relating back to an entry on the parent grid. (See parent grid below).

Click refers to a single-click of the left button on your computer mouse. (If your mouse is set for left-handed use, this will be the right button.)

Double-click refers to a double-click of the left button on your computer mouse.

Drag refers to left-clicking on an object and moving the mouse while holding the left-mouse button down, thus moving (dragging) the object across the screen until it is *dropped*.




Drop refers to the release of the object being *dragged*, by release of the left-mouse button when the object is positioned over its destination on the screen.

**Drop-down box/
Drop-down list** refers to a box which opens to list all available selections for a field. This list is revealed upon clicking the drop down arrow  symbol in the field.

Field refers to a blank text box on a form into which text or numbers are to be inserted.

Functions refer to the individual portions of the program found within each module. Each is indicated by a separate Eagle head Icon.



List Bar	refers to the area to the far left of the screen where Module selections may be made.
Log-on/ Logging-on	is a term used for entering the program, usually under a unique user-name or ID.
Modules	refer to the sections of the program indicated by the topics of SETTINGS, HELP, REPORTS, ETC, FIND & EDIT, and others which may have been purchased to accompany this software package.
Parent Grid	a grid, or table, of information containing entries with the ability to open a second grid (table), known as the child grid, containing further information related to the entry on the parent grid.
Radio button	refers to a selection feature indicated by a  symbol in which only one selection can be made from the choices given, as in Male or Female.  Male  Female
Right-click	refers to a single-click of the right button on your computer mouse. (If your mouse is set for left-handed use, this will be the left button.)
Synchronize	refers to the process of logging onto the Internet site for information exchange.
User-name	the name or identification unique to a user of a program, often used to sign-in or log-on to a program.
Zip	when referring to a file, this is a function which compacts the data into a smaller file size for quicker transfer across the Internet.

