2013

REFORMERS UNANIMOUS INTERNATIONAL

FastTrack

2/13/2013

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Introduction

The purpose of the RU software is to track your student's attendance and participation through the RU program.

- Names and addresses of students are entered to provide a database of your students. This can be used to mail letters, postcards, and generate phone lists.
- 300 Club Card information is entered to provide reports on participation, notification of who achieved 300 club, alerts on attendance awards. Other reports can be generated for Counsel Leaders to monitor their students.
- Manages 2-3-4 contacts. Reports can be generated each week for Counsel Leaders and Helpers so they know the required contacts. Complete student information is on the same report.
- Awards earned are entered to track what awards have been given.
- Pastors Report easily generated for distribution to the National Office.
- You will find the software eliminates virtually all manual tracking and paperwork systems. Additionally all your information is now contained in a database – the possibilities are endless!

Installing your Software

To use this software you will need to have Microsoft Access 2007 or 2010, OR *free* Microsoft Access Runtime. If you do not own Microsoft Access, your ministry may qualify to get the entire Microsoft Office suite for $70 under Microsoft's charitable licensing program – check with our local software reseller for details.

To obtain the free Microsoft Access Runtime, go to http://www.microsoft.com/downloads and search for Access Runtime. One of the results will be "Access 2010 Download: Access Runtime". Click this link to download.

Note: Using the Runtime does have some limitations:

- Cannot export reports to Word or PDF.
- Cannot delete records.
- Cannot create custom queries or reports.

For basic FastTrack use, the Runtime will work adequately.
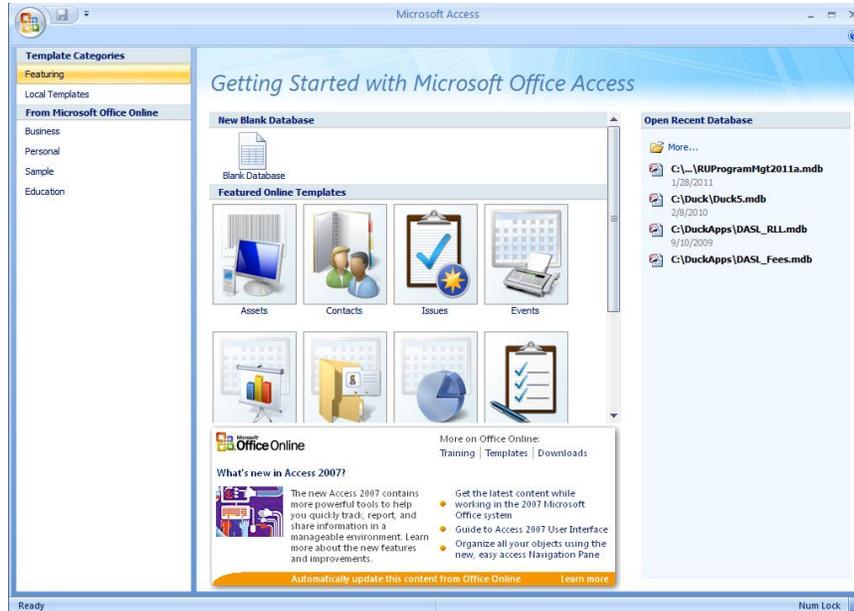
The RU software is simply an Access database. It is a single file – similar to a Microsoft Word document. You will need to copy the RU ProgramMgt2011 database file to your computer or location from where you wish to use the file.

The most common work area is the "My Documents" folder. You may want to make a folder under "My Documents" to store your database and any other associated documents you create. (*You cannot run the database off the CD because it is "read only".*)

**Tip: Consider purchasing a USB or Jump drive to store your RU Database. This will allow you to take your RU Database with you and work on it from multiple computers.

Opening the FastTrack Database

To use your RU software you can open it by browsing to the file and double clicking on the file from Windows Explorer (or My Computer) or you can launch your Access program, do File, Open, and browse to the file.

**Tip: Windows Explorer, right-click on your RU database, select Send To, Desktop (shortcut). That will provide a convenient short-cut to open your database each time you need to use it.
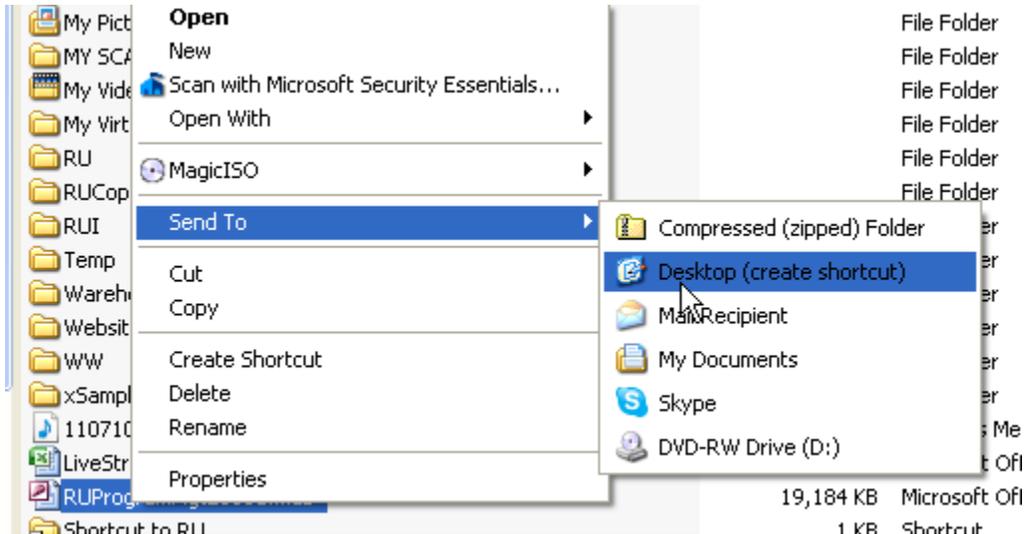

Program Setup

Before you start using the RU Software for your Friday night class there are a few things that you need to setup in the database to make it work appropriately for your chapter.

Edit Chapter Information

Enter your chapter information. This information is used to generate the Pastor's Report.
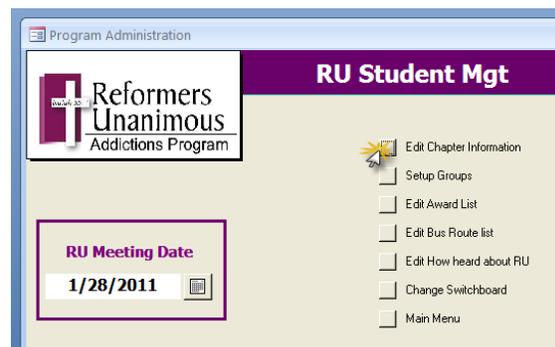
Group Setup

Groups correspond to your Counsel/Challenge Groups and RU Departments. It is necessary for groups to match your RU chapter setup. When students are entered into the database they are assigned a group. Groups will organize your data for reporting.

GroupID

Use group 0 for first time students.
Suggested group numbering system:
- 100-199 for children (nursery, Kidz Club)
- 200-299 for teen groups
- 300-899 for adults groups
- 900 or higher for miscellaneous workers (Director, secretary, etc…).

GrpName

Enter the Group Names.

234Report

Put a check in the box under the column "234Report" on groups that you want included in the 2-3-4 reports.

**Tip: 2-3-4 Reports should include all adult groups, but are not required for the smaller children groups (nursery, 3-5 year olds).

Gender

Specify M or F under the "Gender" column if it applies to the group. Leave it blank if the group is not gender specific

GrpSection

Fill in the group section. Specify group as: Adult, Teen or Kidz.
Note: Specify these exactly as they are listed here.

Att. Form

Check the box under "Att. Form" for groups that you would like an Attendance Form generated for. This is generally used for your Nursery and 3-5 year old groups where you are not completing 300 Club cards on the students.

Bus Setup (Optional)

If you want to keep track of which bus a student rides, setup the bus route names in your database:
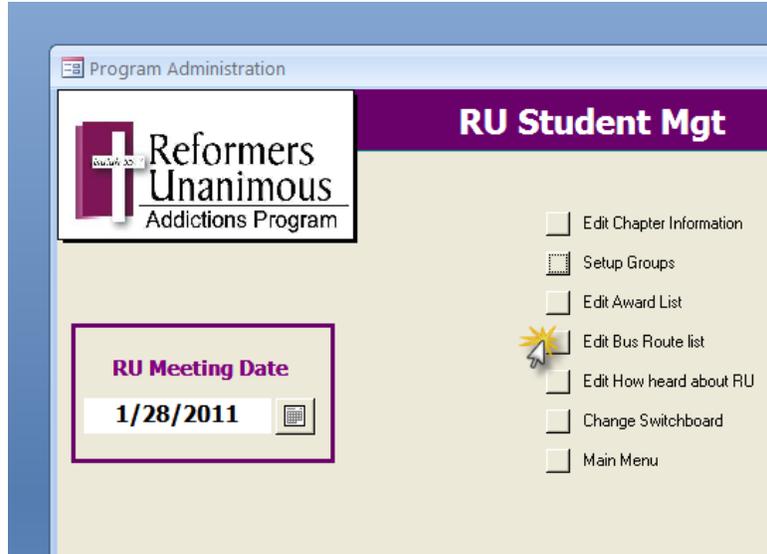
How did you hear about RU?

This is only necessary to edit if you need to add options to the existing list.
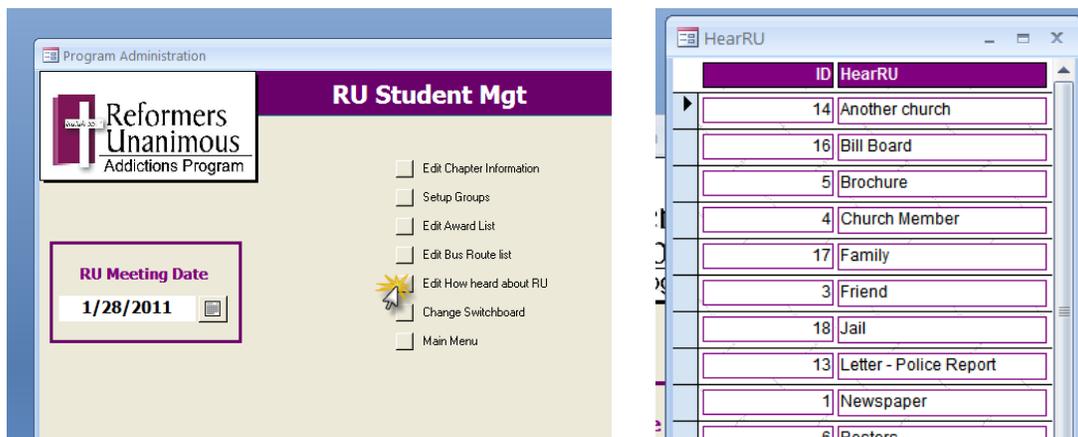
Student Setup

First time RU attendees should complete a registration card. Use the registration card to enter your new students into the database.

At the Main Menu, **make sure the date reflects your class date**.
To enter your students, click on "Student" and complete as much information as possible.
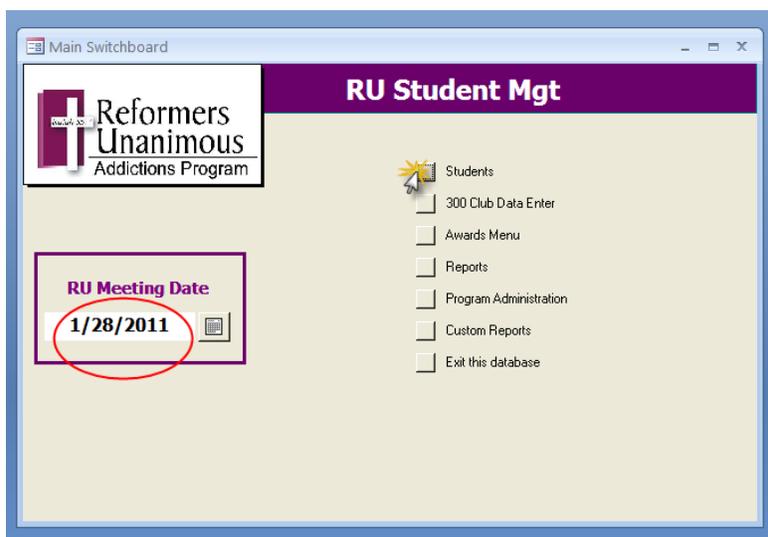
Be sure to enter the "First Visit" date. New students will be assigned to group "0 – Unassigned" until they return to RU a second time and are assigned a group. Children can be assigned to the appropriate department.
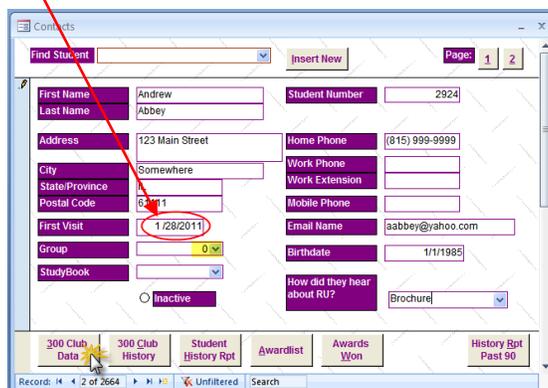
∗∗Click the 300 Club button and enter the date and give the student 10 points for attendance. If the students complete challenges in the Beginners class you can assign them appropriate challenge points.

**Tip: If you forget to do this, the student will not be counted in the attendance reports. Click the X to close this window.*

Change Student Information
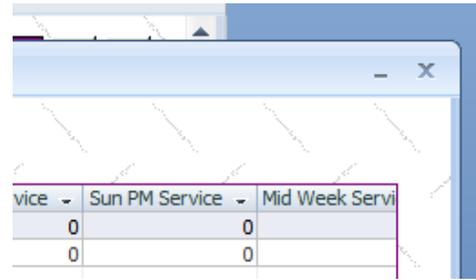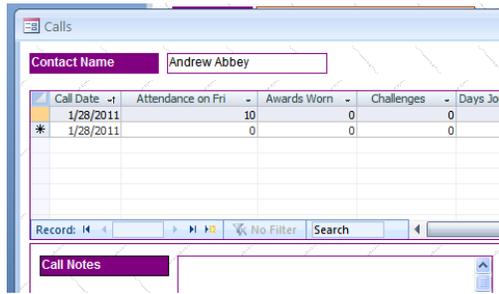
To change any student information – address, group, 300 Club data, Awards, etc…

From the Main Menu/Students – type the students name in the Find Student field and hit Enter.

Enter or change information as necessary. Click the X to close this window.
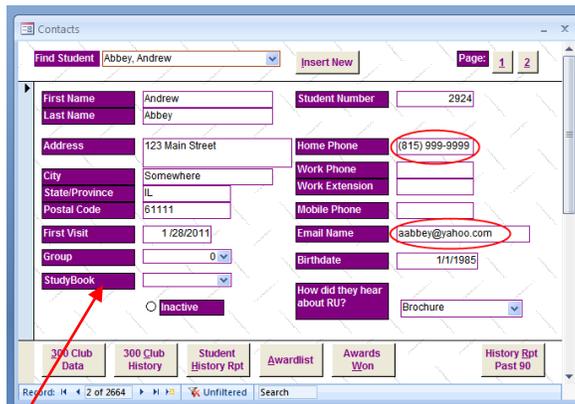
StudyBook is a new field available for you to track what challenge book your student is working in. This field is utilized by another new feature – **Enter Awards**, which is now located on the 300 club entry screen (page 14).

**Tip: Mark students "Inactive" who have not attended RU 3 months or more this will keep reports manageable and usable. Do not delete students – you don't want to lose this data.

300 Club Data

Each student who attends RU completes a 300 Club card. This information is entered into the database to track attendance and participation.

300 Club – Group Filter

The 300 Club by Group option allows the student list to be filtered by group. If your 300 Club cards are sorted by group, this option can make it easier to select the student from the list and expedite entering your data.

Check the RU Meeting Date – if it is not correct, click on the calendar icon to select the correct date.

From the Main Menu select 300 Club Data Enter/ 300 Club – Group Filter.
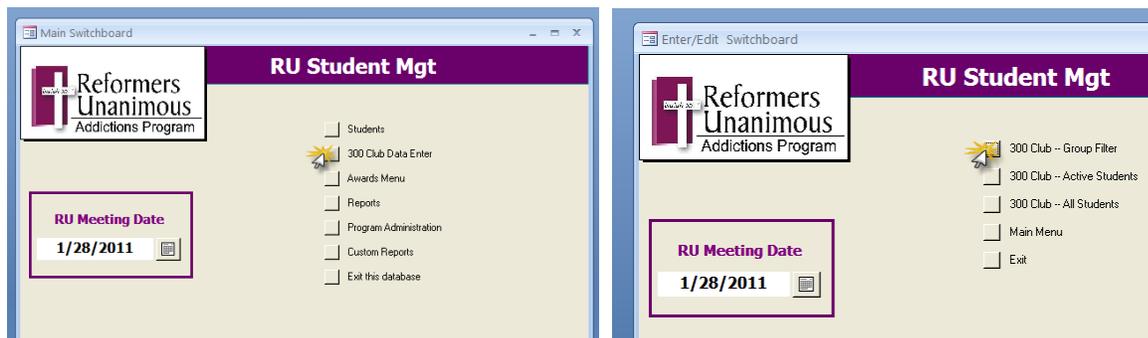
Use the drop down list to select the group. You can select a student by using the drop down list or by typing their last name. Hit enter to move to the date field and hit tab to skip to *Attendance Fri*. Continue tabbing and enter the points as they appear on the 300 Club card for all students. Click the X to close this window.

**Tip: The RU Date field is there to allow you to enter points for weeks where students missed RU. Set the date to missed week and enter the student's points.*

300 Club – Active Student

Enter points the same way as 300 Club – Group Filter… the only difference is the student list will contain **all** active students. It will not be filtered by group.

Awards

Enter the Awards earned that were indicated on the 300 Club card or attendance sheet.

Main Menu - Awards Menu/Awards Enter.
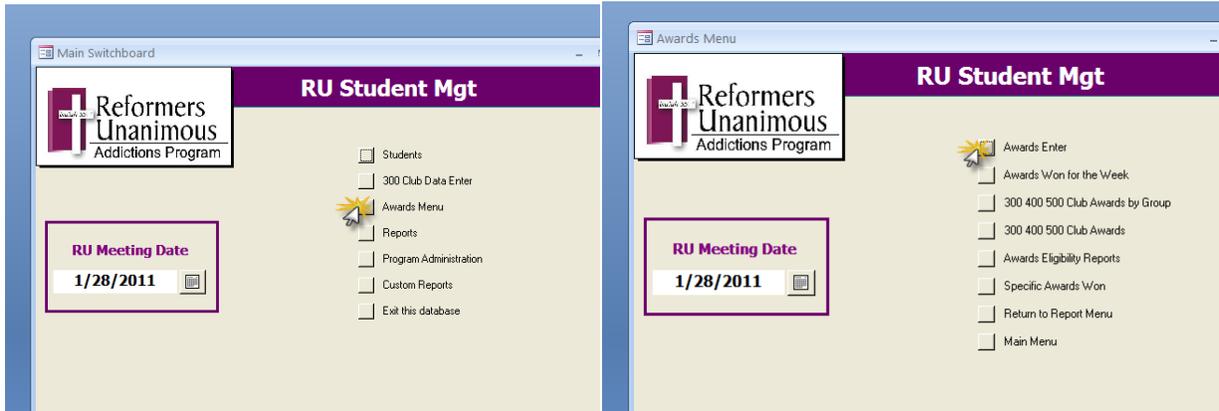
Select the student from the Contact ID drop down list and then select the award from the Awards Won drop down list.
**Tip: You can select students and awards by the drop down OR by typing the name.*
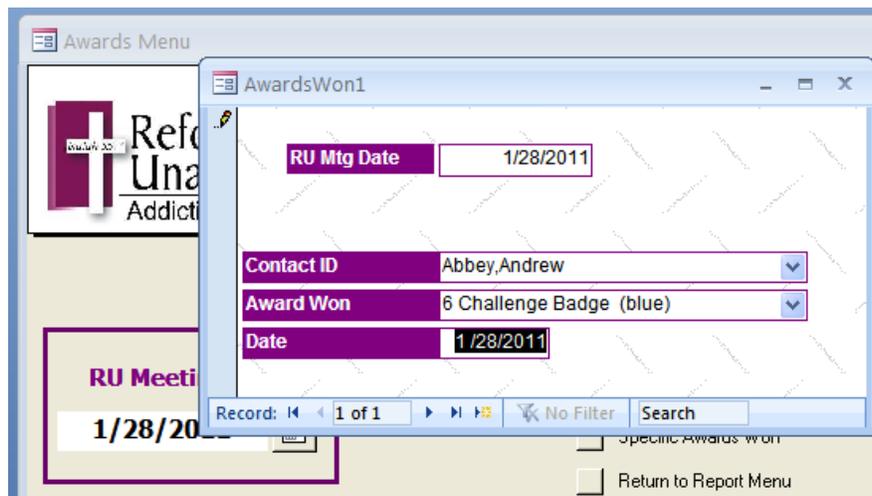
Hit enter or tab to the RU Date to get the field filled in appropriately. After entering all awards click the X to close the window.

Quick Entry Awards

From the 300 Club screen you now have the option to enter the student's awards. After you enter the student's points from their 300 club card and they have marked an "award earned" on the back of their card, you can enter that award from this screen by clicking on **Enter Awards**. The award list will be filtered based on the **StudyBook** field. Once you are finished entering the awards for that particular student, be sure to close the *AwardsWon* window.

Check Attendance Awards

Students who attend 10 out of 12 weeks and 20 out of 26 weeks receive an attendance award. There are two reports setup to check for students eligible for these awards.

Main Menu> Awards Menu> Awards Eligibility Reports

"Attendance 10 of 12 weeks" **And** "Attendance 20 of 26 weeks" reports:

Run the report – students eligible for an award will have the number of weeks they have attended highlighted in red.

Give the student their attendance award **and enter the award (Awards Enter)**.

**Tip: Students only receive attendance awards one time. After receiving the award they are excluded from this report.

Friday Night Tasks

- ✓ Enter new student information from registration cards.
- ✓ Enter 300 Club data on existing students.
- ✓ Run reports to check for Attendance awards.
- ✓ Enter awards into database, print Awards Won for the Week report, and prepare awards for distribution.
- ✓ Last Friday of the month, run report to check for students who have earned the 300 Club.

1. Awards Menu> 300 400 500 Club Awards
   **Tip: A *3, 4* or *5* will appear in the "Award" column for students who are due the 300 Club award.*
   **Tip: Use the "300 400 500 Club Awards by Group" to create more comrodery with in the groups and competition among the groups.*

PASTOR'S REPORT

The Director's report idea was improved and re-commissioned at the 2010 conference. Instead of a Director's Report, it has been changed to a Pastor's Report. You can download the PDF or the Word document from sl.reformu.com/resources(two-sided report). The section of information Rockford is requesting will take less than two minutes to upload to us by visiting sl.reformu.com/pastorsreport.

The Fast Track software is now updated to generate this report so you can print it out, enter the data, enter any notes to your Pastor and leave in his inbox before the night is complete. To receive the updated software, email fasttrack@reformu.com and ask for the upgrade.
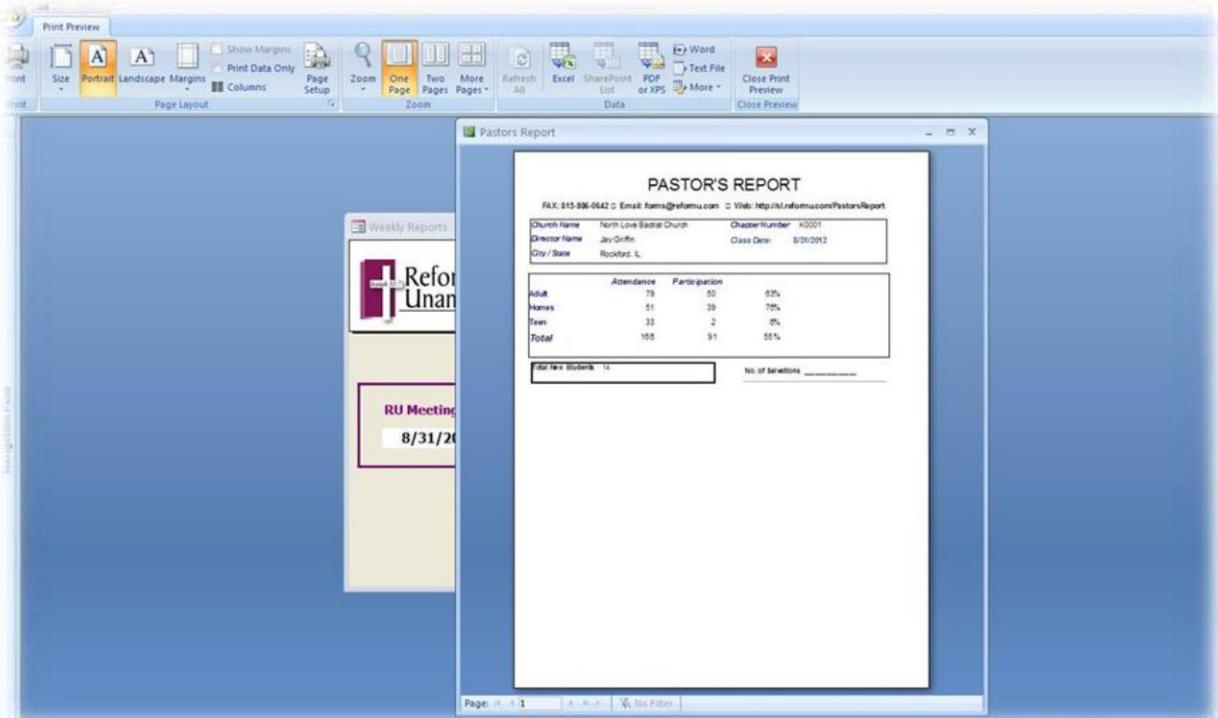
Monday Tasks

- ✓ Provide RU Director the 1-3-5 Report.
  - • Weekly Reports> Directors 1-3-5 --- this first provides the Director with a list of new students for the week, absent students (1), a list of postcards that need to be send (3), and a list of students who the Director should visit (5).

**Tip: The "Director Postcard List" report can be exported to Excel and used as data for a Word Mail Merge to automatically print postcards.

- ✓ Run BAM Report for Director to use to motivate leaders and for leaders to motivate students. This shows the percentage of students who were present that participated in challenges.
  1. Weekly Reports> BAM Report

- ✓ Print 300 Club History report
  2. Weekly Reports> Student History – Past 30 Days

**Tip: This is important information to provide to Group Leaders so they can see a history of students participation and encourage students not participating to do Challenges and Daily Journal.

- ✓ Print 2-3-4 Sheets.
  3. Make any address or phone number changes recorded on the 2-3-4 sheets turned in at Friday's class.
  4. To print the 2-3-4 Sheets for the upcoming Friday night class: Weekly Reports> 2-3-4 and Contacts Report – All Workers.

**Tip: Set the date on the main menu back to the date of Friday's class. It defaults to the current day, so you want to make sure you change it back to the correct date before running your 2-3-4 reports.
Reminder – this report will be generated for each group you specified in your group setup (see Group Setup).

Other Reports

- ✓ Check the Reports Menu for other reports that may be helpful. Some reports you may consider using on a regular basis:
  1. Birthday Lists – Use the current month list to create a list for your RU Bulletin.
  2. Worker Directory – share with RU Leaders and Helpers so they will have contact information for fellow workers.

Backup your database

Copy your database to a different drive – if you store your database under My Documents copy it to a USB or jump drive; if you store your database on a jump drive, then copy it to your C: drive.

✓ Tools, Database Utilities, Backup Database – select a location. It will add the date to your file name allowing you to keep multiple backup files.

✓ Do every week – if you have a problem with your database you will never re-enter more than 1 week's worth of data.

Compact and Repair your database

Compact and Repair checks your database file for problems. In some cases it will shrink the file. This should be done regularly to make sure your database file is free of problems.

✓ Tools, Database Utilities, Compact and Repair Database.

Doing Mail Merges:

1. **Create a DSN that points to your database.**	2. **Creating the Word 2007 document**
Note: Using a DSN is an advantage when software upgrades occur. • Start • Control Panel • Administrative Tools • Data Sources • Click on the System DSN tab • Add • Find "Microsoft Access Driver (*.mdb)" from the Finish • Source Name: RU Data • Select – Browse to where your RU database is stored (RUProgramMgt2011g) • Select your database and click OK • Click OK • Click OK	• Open Word • Mailings • Start Mail Merge (Step by Step Mail Merge Wizard) • Select Document type (Envelope Example) • Select Envelope • Click Next: Starting Document • Envelope Options – to set size • Next: Select Recipients • Browse • Connect to New Data Source.odc • Open • ODBC DSN • Next • Select "RU Data" (DSN created in step 1) • Next • Select a Query (ie. StudentActiveQuery) • Next • Finish • OK • Next: Arrange your envelope • Insert Text box for return address (Insert/Text Box) • More Items • Insert fields for name/address. • Next: Preview • Save the file!!! • Preview button • Find Entry • Merging multiple records • Merge to printer OR • Merge to document.

The mail merge is really a function of Microsoft Office. Word has a wizard to walk you through setting up a mail merge document (tools, letters and mailing, mail merge).

Select "use an existing list" when it asked you for the data. Browse to your database (RUProgramMtg2011) and select it. A list of tables and queries will be displayed.

Table:
Students – gives ALL students

Queries:
StudentQueryActive– gives you active students
StudentInactiveQueryLastVisit – gives you inactive students
WorkerQuery – gives you people you have setup as workers

After you select the data you can select the fields you want to insert – again this is a Microsoft Word thing and not an RU Software thing – so you can check the Word Help file if the wizard doesn't help you get completely setup.