

Faithworks People Search

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1. THE PURPOSE OF THIS MANUAL

In October 2004, the People Search feature in Faithworks was completely revamped resulting in a much more powerful tool for users to extract required lists of people from within Faithworks. To help users get the most out of the new People Search, this manual was created. This manual is designed to be an addition to the main Faithworks manual.

2. DEFINITIONS USED IN THIS MANUAL

Search: A Search of the people in Faithworks with criteria entered by you. You enter more than one criteria you would like to use, and People Search will create the query required to extract those people meeting all your criteria.

Faithworks Area: One of the following areas in Faithworks:

- Leadership
- A-Groups
- Groups
- Special Events
- Training

Operator: The description used between the selected field and the required value. (ie. Church Status EQUALS "Member"). "Equals" is the operator. Operators include:

- Equals (eg. Church Status Equals "Member")
- Does Not Equal (eg. Church Status Does Not Equal "Member")
- Is Blank (eg. Church Status field is blank)
- Like (allows the use of wildcards in the searching of words. See the section in this manual on Using the Like Operator)
- No Record (eg. To show those that have no involvement in a Faithworks Area. For example, to show all Members who are not involved in any Small Group)
- Has Record (eg. To show those that have involvement in a Faithworks Area. For example, to show all Members who are involved in any Small Group)
- Between Dates (eg. Show me those with an Entry Date between 1 Jan 04 and 31 Jan 04)
- Is Blank (eg. Show me those with a blank Family Role)
- Between Numbers (eg. Show me those with an Age between 15 and 25)

IP The letters IP are used throughout the application and in this manual. They stand for Individual Profiles, and are used to refer to fields in the Individual Profile screen (or more specifically the table tblPeople). Note that the IP fields do not include fields in the Faithworks Areas (as defined above), even though they are technically viewed through the Individual Profile screen.

3. WHAT YOU CAN DO WITH PEOPLE SEARCH

This new People Search screen gives you more power over the previous version. Some of the things you will be able to do with it include:

- Save searches with a description. Once you've created a search, you can select it from a drop down list, and not have to re-enter the criteria.
- Exclude people from a search. (eg. Show me everyone who has a Church Status of "Member", and exclude those where the Marital Status = "Married")
- Select more than one value from the same field. (eg. Show me everyone who has a Church Status of "Member" or "Visitor")
- Select the operator (AND or OR) you would like to use between fields in Individual Profiles. (eg. Show me those with a Marital Status of "Married" (AND or OR) those with a Family Role of "Father".
- Choose what Individual Profile fields you want displayed in the final search results of individuals. (eg. You can display more than just the postal details)
- Choose what format to use for the postage labels when merging individuals into family units. In the previous version of People Search you had no choice, and the final result of placing the first names of all the individuals in the postage label, was impractical (ie. Angelo, Jennie, Isabella and Sebastian Antonino). You can now choose between the formats of "Angelo and Jennie Antonino", "Mr and Mrs A Antonino" or "The Antonino Family".
- Add customised fields to the People Search. This means if you add fields to the tblPeople table, you can include these fields

in the new People Search.

4. WHAT YOU CAN'T DO WITH PEOPLE SEARCH

Known limitations of People Search are as follows:

- You cannot display the field in the final results, if the field is not from the table tblPeople. For example, if you choose to display all those with an A-Group of "Musical Ministry", you cannot have the A-Group field displayed in the final results.

5. FAITHWORKS DATA REQUIREMENTS

In order for some of the features to give correct results, there are some requirements that must be met regarding the data in Faithworks.

5.1 Family Units

- In order for the Merging of Individuals into family units to give correct results, it is important that all individuals have a family unit. Those without will not end up in the merged results.

5.2 Family Roles and Order Numbers

- In order for the Merging of Individuals into family units to give correct results, it is important all individuals are given the correct Family Role, and corresponding Order Number.
- To edit the family roles OrderNbrs, click on the "Family Roles" button in the Utilities section of People Search.
- Those with no Family Role entered will be treated as single people.
- The Partners field must be ticked for those roles that indicate the people in the relationship are 'partners' and not married. This would apply to defacto relationships, and same sex partnerships.

The Family Role "OrderNbrs" must have the following meanings:

1. Father, Husband or Single Adult
2. Mother, Wife
3. (or greater than 3) Child, Single Adult

- The OrderNbr must not be 0 (zero) as this is treated the same as being blank.

You must make sure the family role details within a family unit are correct. For example, if you have more than one individual with an OrderNbr > 2 (indicating they are children one family unit), belonging to the same family unit, and there is no individual in that family unit with an OrderNbr of 1 or 2 (father or mother), then the results will not be correct.

Here is a good sample list of Family Roles, which should satisfy most churches, and will also satisfy the People Search requirements.

Role	OrderNbr	Partner
Partner Male	1	Yes
Husband/Father	1	
Husband	1	
Father	1	
Partner Female	2	Yes
Wife/Mother	2	
Wife	2	
Mother	2	
Child 1	3	
Child 2	4	
Child 3	5	
Child 4	6	
Child 5	7	
Child 6	8	
Single Adult	9	

Role	OrderNbr	Partner
Other	10	

- Note that **Single Adult** can have an **OrderNbr** of either 1 or greater than 3.
- Also, the benefit of having Child 1 through to Child 6 (or more if you like), each with a different OrderNbr, is that in the Letter Salutation of the merged results, where the first names of all family members are listed, the children will be listed in order. If all the children had a **Role** of Child (ie. having the same **OrderNbr**), then the children may not be listed in chronological order.

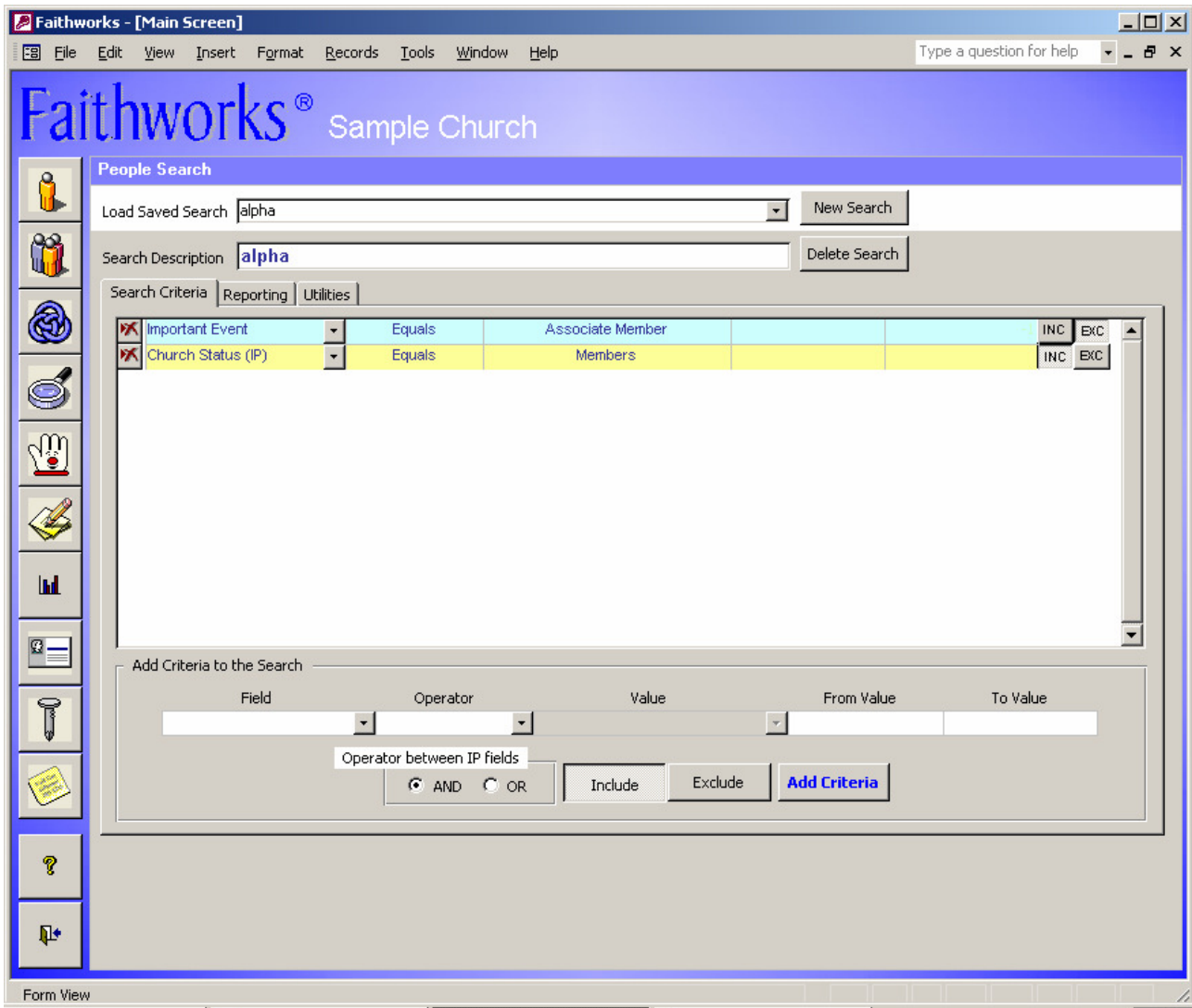
5.3 Family Merge Format 2 – Mr and Mrs A Antonino (Postage Label)

- If a person has no Title entered, and has a Role OrderNbr of 2, then "Mrs" will be used as default.
- If a person has no Title entered, and has a Role OrderNbr of 1, and there is a person another person in the same family unit with a Role OrderNbr of 2 or greater than 2, then "Mr" will be used as default, otherwise no Title will be used.
- For single people, or if Role is blank, if the person has no surname, then the full Preferred Name is used with no title. (ie. Jack)
- For singles, if no Title exists, no Title will be displayed. (ie. A Antonino, instead of Mr A Antonino)

6. CREATING A SEARCH

1. Click the 'New Search' button
2. Enter a description for the search in the 'Search Description' box (limited to 50 characters).
3. You must then select the search criteria, one criteria at a time. This is done by filling out the appropriate fields in the 'Add Criteria to the Search' section:
 - **Field:** Select the field from Faithworks that you would like to filter on. The fields marked with (IP) mean it is from Individual Profiles (or more specifically the tblPeople table).
 - **Operator:** Select your required Operator (See the section above on Definitions Used in This Manual)
 - **Value:** Select your required value that you would like to search for
 - **From Value:** Fields that are dates or numbers will require you to enter in a "From" and "To" range. If the field is a date then an input mask of dd/mm/yyyy will be provided, or you can double click on the 'From Value' and 'To Value' boxes to display a calendar from which to select your date.
 - **Include/Exclude:** Select whether you would like to include the people meeting your entered criteria, or exclude them. For example, you can choose to select all those with a Church Status equal to "Member". By choosing 'Include', you will be selecting everyone who has a Church Status of 'Member'. By choosing 'Exclude' then you will be selecting everyone in the database, but exclude those with a Church Status equal to "Member".
4. After you have selected (or entered) the above values for one criteria, click on the 'Add Criteria' button to 'Save' the criteria. The criteria will then move into the 'Search Criteria' sub window.
5. Repeat steps 3 and 4 for every criteria you would like to use in the Search.

6. You do not need to click a button to save the entire search. The search is saved automatically as it is created.



The Blue and Yellow rows (in the above screen)

This section shows you the saved criteria for a search.

- To remove a criteria from a Search, click the Delete Record button on the left of the criteria row (the button with the red symbol on it).
- The INC and EXC buttons indicate whether the criteria includes or excludes people with that criteria. You can click the INC and EXC buttons in this section. You will notice that the row will change color depending on whether the INC or EXC button is selected.

Sample Searches and their Results:

- **Sample Search 1**

Field	Operator	Value	From Value	To Value	Include/Exclude
Church Status (IP)	Equals	Member			Include
Church Status (IP)	Equals	Friend			Include

Operator Between IP Fields = OR

This search will display all people with a Church Status of 'Member' or 'Friend'. Note that if the Operator between IP fields is changed to AND, the results remain unchanged.

• **Sample Search 2**

Field	Operator	Value	From Value	To Value	Include/Exclude
Church Status (IP)	Equals	Member			Include
Church Status (IP)	Equals	Friend			Include
Marital Status (IP)	Equals	Married			Include

Operator Between IP Fields = OR

This search will display all people where one of the following two conditions is true:

1. They have a Church Status of 'Member' or 'Friend', **OR**
2. They have a Marital Status of Married.

• **Sample Search 3**

Field	Operator	Value	From Value	To Value	Include/Exclude
Church Status (IP)	Equals	Member			Include
Church Status (IP)	Equals	Friend			Include
Marital Status (IP)	Equals	Married			Include

Operator Between IP Fields = AND

This search will display all people where the following conditions is true:

- They have a Church Status of 'Member' or 'Friend' **AND** they have a Marital Status of 'Married'.

• **Sample Search 4**

Field	Operator	Value	From Value	To Value	Include/Exclude
Church Status (IP)	Equals	Member			Include
Church Status (IP)	Equals	Friend			Include
Marital Status (IP)	Equals	Married			Include
A-Group	Equals	Music Team			Include

Operator Between IP Fields = AND

This search will display all people where the following conditions are true:

- They have a Church Status of 'Member' or 'Friend' **AND** they have a Marital Status of 'Married' **AND** they belong in the A-Group of 'Music Team'

• **Sample Search 5**

Field	Operator	Value	From Value	To Value	Include/Exclude
Church Status (IP)	Equals	Member			Include
Church Status (IP)	Equals	Friend			Include
Marital Status (IP)	Equals	Married			Include
A-Group	Equals	Music Team			Include

Operator Between IP Fields = OR

This search will display all people where one of the following 2 conditions is true:

1. They have a Church Status of 'Member' or 'Friend' **AND** they belong in the A-Group of 'Music Team', **OR**
2. They have a Marital Status of 'Married' **AND** they belong in the A-Group of 'Music Team'

• **Sample Search 6**

Field	Operator	Value	From Value	To Value	Include/Exclude
Church Status (IP)	Equals	Member			Include

Church Status (IP)	Equals	Friend			Include
Marital Status (IP)	Equals	Married			Include
A-Group	Equals	Music Team			Include
Gender (IP)	Equals	M			Exclude

Operator Between IP Fields = OR

This search will display all people where one of the following 2 conditions is true:

1. They have a Church Status of 'Member' or 'Friend' AND they belong in the A-Group of 'Music Team', **OR**
2. They have a Marital Status of 'Married' AND they belong in the A-Group of 'Music Team'

And will exclude those people where Gender equals 'M'.

6.1 Delete Search

This button will delete the selected search.

6.2 Other Points about Selecting Criteria

- **Operator Between IP Fields:** Select the operator (AND or OR) you would like to use between fields in Individual Profiles. (eg. Show me those with a Marital Status of "Married" (AND or OR) those with a Family Role of "Father". Remember that this only applies to fields marked with (IP), and it does not apply to criteria using the same fields. For an example see Sample Search 2 and 3 above.
- You can enter as many criteria as you like, but if you enter criteria that contradict another, you will get an error message. For example, you cannot set the following two criteria's:

Field	Operator	Value	From Value	To Value	Include/Exclude
Group Role	Equals	Member			Include
Group Role	No Record	Member			Include

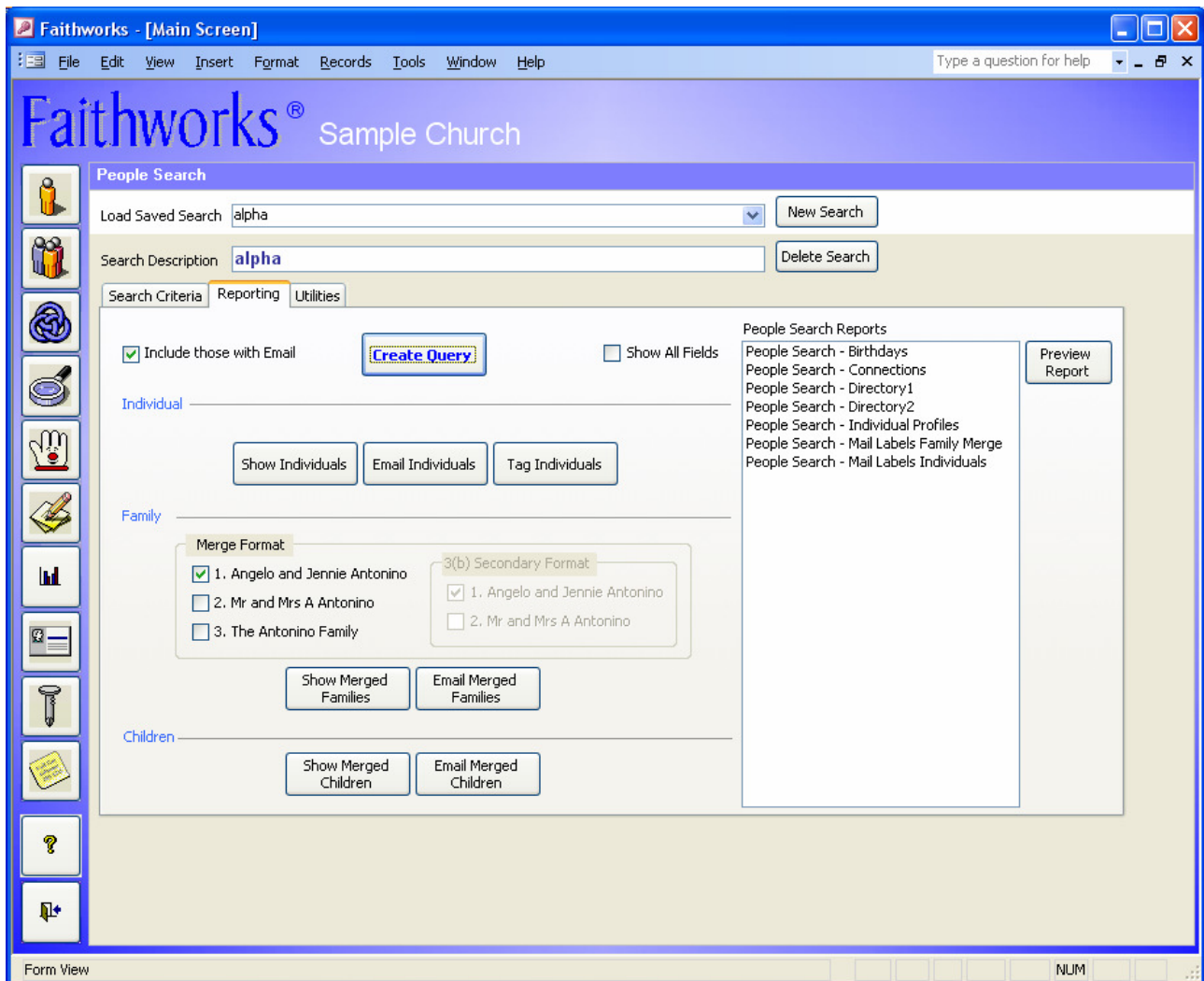
Eg. Criteria that contradict one-an-other and will result in an error

6.3 Using the "Like" Operator

The Like operator allows you to use wildcards in the search criteria. Available wildcards are as follows. Note this information is taken directly from the Access Help where more details are available:

Character	Usage	Example
*	Matches any number of characters. It can be used as the first or last character in the character string.	"wh*" finds what, white, and why
?	Matches any single alphabetic character.	"B?ll" finds ball, bell, and bill
[]	Matches any single character within the brackets.	"B[ae]ll" finds ball and bell but not bill
!	Matches any character not in the brackets.	"b[!ae]ll" finds bill and bull but not bell
-	Matches any one of a range of characters. You must specify the range in ascending order (A to Z, not Z to A).	"b[a-c]d" finds bad, bbd, and bcd
#	Matches any single numeric character.	"1#3" finds 103, 113, 123

7. REPORTING TAB



7.1 Create Query

Clicking this button will create the query for your chosen search. This is the first step you need to do to see your results.

7.2 Individual

Show Individuals: Click this button to view all the individuals that match your search criteria.

Include those with email: Ticking this box includes people with emails in your results from the following buttons:

1. Show Individuals
2. Show Merged Families
3. Show Merged Children

If you un tick this box, you will only see those people who do not have an email address. This tick box is useful if you wish to send a mail merge to those with no email address, and an email to those with an email address.

Email Individuals: Click this button to send an email to the matching individuals. A separate window will appear which enables you to send emails. This window is explained elsewhere in this manual.

Tag Individuals: Click this button to tag the individuals last viewed through the [Show Individuals](#) button.

Show All Fields: Ticking this box effects the fields displayed when clicking the [Show Individuals](#) button. If it is ticked it will display the query called "qryPeopleSearchResults", which shows the fields as set by you (from the Utilities tab). This is covered later on. You can only display fields from the Individual Profile screen (IP fields).

7.3 Family

Show Merged Families

Clicking this button shows you the results of the search, but with individuals merged into family units. The purpose of this is to avoid sending more than one letter (or email) to members of the same family. For example, if both Angelo and Jennie Antonino meet the criteria of your search, rather than send a letter (or email) to Angelo and another to Jennie, it is more efficient (not to mention more professional) to send one letter (or email) that addresses both Angelo and Jennie.

When merging individuals, you do not have a choice of fields as you do for the 'Show Individuals' button. When you click on the **Show Merged** button the following fields are displayed:

- **FamilyUnit**
This will be the family unit as entered in the individual profiles. This is the field that groups people into a family.
- **PostageLabel**
This is the field that should be used in the first line of the postage label, if you are printing postage labels (for envelopes). You have a choice of formats available for this field. The choices are detailed in the section in this manual called **Family Merge Format**.
- **LetterSalutation**
This field addresses all the people in the family unit by their Preferred Name (or First Name if Preferred Name is blank), and is designed for the salutation of the letter (or email). For example, "Hello **Angelo and Jennie**". The order of the names is according to the **OrderNbr** of the people's **FamilyRole**. See the section on **Family Roles and Order Numbers** for more information.
- **PostageStreet**
This field stores the Postage Street as entered in the Individual Profiles, Postage Details section.
- **PostageSuburb**
This field stores the Postage Suburb details as entered in the Individual Profiles, Postage Details section.
- **PostageState**
This field stores the Postage State details as entered in the Individual Profiles, Postage Details section.
- **PostagePostCode**
This field stores the Postage Post Code details as entered in the Individual Profiles, Postage Details section.

Note: For all four postage detail fields above, if members of the same family unit have different postage details (or some are blank), then for each field, Faithworks will look at the people in OrderNbr (from FamilyRole) ascending order, and use the first populated field.

- **EmailAddress**
This field will store all the email addresses of the each individual in the family unit. For example, if both Angelo and Jennie have their own email addresses, then both will be listed in this field. The same email address will not be listed more than once.
This field ensures all the individuals in the family unit (with an email address) receive an email.
- **Children**
This field is populated when clicking the **Show Merged Children** button, and is explained in the next section.

Email Merged Families

Click this button to send an email to the families. A separate window will appear which enables you to send emails. This window is explained elsewhere in this manual.

Merge Format

This section allows you to choose the format of the Postage Labels when merging individuals into family units.

You have the following choices:

❖ **Angelo and Jennie Antonino**

This selection uses the preferred name (or the first name if the preferred name is blank) of the husband and wife, followed by the surname. If the wife prefers to use her maiden name (and hence the tick box of **Person Uses Maiden Name** is ticked), then the format will be **Angelo and Jennie (Conway) Antonino**.

❖ **Mr and Mrs A Antonino**

This selection uses the Title of both the husband and the wife, followed by the Initial and Surname of the husband.

If there is no title entered for the female partner then "Mrs" will be used. If there is no title entered for the male partner then "Mr" is used. For singles, if the family role is blank (and therefore a gender can not be assumed) then the full preferred name/first name only will be used. If no surname exists, then the merge will result in 'Mr and Mrs A'

❖ **The Antonino Family**

This selection uses the surname of the family only. When selecting this option, you must also select the format you would like to use for single people. This is done by selecting a **3(b) Secondary Format**. If no surname exist then the merge will result in "The Family".

Family Merge Format for 'Partners'

If there is at least one individual in a family unit where their family role indicates they are a Partner (ie. The Partner field is ticked in the Family Role list), then all the individuals with a family role order number of 1 or 2 will be included in the postage label.

The format of the postage label, irrespective of what Family Merge Format is chosen, will be **Mr A Smith and Mr B Jones**. Note the fields are only used in the postage label if they are populated.

7.4 Children

Show Merged Children

This button is used when you want to correspond (send emails or letters) to the parents of children, and you would like the selected children merged into their family units. The results assume that the search criteria result only in children being selected.

Example:

- Let's assume you have one criteria where Group Name = "Kids Zone".
- The **Show Individuals** button shows 2 records, as they are the only 2 individuals that belong to Kids Zone:

PPrimKey	Firstname	Surname	FamilyUnit	FamilyRole	Parents	EmailofParents
41	Sabastian	Antonino	Antonino, A & J	Child	Angelo and Jennie	Sebastian@tanzanite.com.au
40	Isabella	Antonino	Antonino, A & J	Child	Angelo and Jennie	Isabella@tanzanite.com.au

- The aim is to send an email to the parents of Sebastian and Isabella, telling them what outstanding children they are. Ideally rather than sending two emails, one for Isabella and one for Sebastian, it would be best to send one email for both Isabella and Sebastian.
- Clicking the **Show Merged Children** button gives the following results:

FamilyUnit	PostageLabel	LetterSalutation	PostalStreet	PostalSuburb	PostalState	PostalPostcode	EmailAddress	Children
Antonino, A & J	Angelo and Jennie Antonino	Angelo and Jennie	12 Happy Road	CANIAMBO	Vic	3630	aj@tanzanite.com.au	Sebastian and Isabella

- You can then arrange to either send a single letter, or a single email, to the parents of the children.
- The order of the children will be according to the **OrderNbr** of their **Family Role**.

The fields shown in this query are as follows:

- **FamilyUnit**
This will be the family unit as entered in the individual profiles. This is the field that groups people into a family.
- **PostageLabel**

This is the field that should be used in the first line of the postage label, if you are printing postage labels (for envelopes). The field is populated from the Individual Profiles of the children, from the Postage Details, **Envelope – name for parents** field.

- **LetterSalutation**
This field addresses the parents of the children, and is designed for the salutation of the letter (or email). For example, “Hello **Angelo and Jennie**”. The field is populated from the Individual Profiles of the children, from the Postage Details, **Letter – greeting for parents** field.
- **PostageStreet**
This field stores the Postage Street as entered in the Individual Profiles of the child, Postal Details section.
- **PostageSuburb**
This field stores the Postage Suburb details as entered in the Individual Profiles of the child, Postal Details section.
- **PostageState**
This field stores the Postage State details as entered in the Individual Profiles of the child, Postal Details section.
- **PostagePostCode**
This field stores the Postage Post Code details as entered in the Individual Profiles of the child, Postal Details section.

Note: For all four postage detail fields above, if members of the same family unit have different postage details (or some are blank), then for each field, Faithworks will look at the people in OrderNbr (from FamilyRole) ascending order, and use the first populated field.

- **EmailAddress**
This field will store the email address of the parents and is populated from the Individual Profiles of the children, from the Postage Details, **Email used to contact parents** field.
- **Children**
This field lists the Preferred Name (or First Name) of each child in the family unit.

Email Merged Children

Click this button to send an email to the parents of the children. A separate window will appear which enables you to send emails. This window is explained elsewhere in this manual.

7.5 People Search Reports

Some reports that exist in Faithworks have been designed to use the data from People Search. All the reports that begin with “People Search - “ will display the individuals last viewed from the Show Individuals button.

To use one of the People Search reports:

- ❖ Select the required Search (or create a new one)
- ❖ Click the Create Query button
- ❖ Select the required People Search report
- ❖ Click the Preview Report button

7.6 Creating Custom Reports for People Search

This section requires MS Access skills

You may wish to create a customised report that displays the results of People Search queries.

For the report to show the results of a search, the report must be linked to one of the following queries:

1. qryPeopleSearchResults (lists the individuals)
2. qryPeopleSearchResultsMerge (lists the results of merged individuals, or merged children)

When using these reports, if the report is looking for a field that does not exist in the linked query, a dialog box will be displayed with a ‘Enter Parameter Value’ prompt for every missing field.

An alternative to using the above queries, is to create a new query for your report, and have all the required fields in that query. Then just link that query to the query qryPeopleSearchResults (linked on field PPrimKey).

To have your custom report appear in the 'Reports' window of the People Search screen, the report name must begin with "People Search - ".

7.7 Postage Labels

You can easily print out postage labels using the reports already supplied. There is one called "People Search Mail Labels Individuals" which you should use for individuals, and another report called "People Search Mail Labels Family Merge" which you should use for when merging individuals into family units.

After selecting a report, and clicking "Preview Report", you will be asked where on the first page you want to start printing the labels. Select a number, and then click OK.

Getting the labels to print out according to the dimensions of your preferred labels can be a fiddly process, and will definitely require printing a few 'test' sheets. To save on label sheets, it is best to print the test sheets on ordinary blank paper, and hold the label sheet up against it to see whether the text is aligned correctly.

To adjust the position of the printing of the labels you should first of all ensure the number of column and rows is set. This is done by opening the 'Utilities' window, clicking the 'Starting Labels Col & Rows', and entering the correct numbers. This setting actually has nothing to do with the print out of the labels. It only sets the columns and rows in the pop up window where you select where you would like to start printing the labels from.

Then, you need to have all the labels appearing on the print preview, and also align the text with the position of the labels. This can be achieved by...

Displaying a print preview of the labels, go into design mode by clicking on 'View', 'Design View', then clicking on 'File', 'Page Setup'. You should then enter the required settings in the 'Margins' and 'Columns' tabs.

You may choose to edit the label design directly (I prefer this method), by (whilst still in design mode) changing the height and width of the label design. This is done by placing the cursor on the borders of the design and moving them.

You may also need to move the text boxes on the design of the labels. This is done by highlighting all three text boxes, and moving them to suit your purposes. You may also change the font size.

After editing the design of the labels and you go to close the design view, Faithworks will ask you if you would like to save the changes. If you are happy with the changes, click 'Yes' otherwise click 'No'.

Please note that you will need to use the 'trial and error' method to succeed in setting up the labels correctly. Simply entering in the dimensions of the labels, as is stated on the labels packaging, will rarely work.

8. UTILITIES

8.1 Criteria Description

This window displays the actual criteria used by People Search for your search. It is written in a user friendlier version of what is known as SQL (Structured Query Language). This window will only be of interest to you if you understand SQL. If you do not, then you need not worry about the information in this window.

This text in this window is updated every time the Create Query button is clicked.

8.2 Family Roles

This button shows you the Family Roles settings and allows you to make changes. For more information about what roles you should set up, and what Order Numbers to use, refer to the section in this manual on **Faithworks Data Requirements**.

8.3 Select IP Fields

This button shows you the list of fields from table tblPeople (which make up the bulk of the fields in Individual Profiles), which are used in the results of People Search. If you have created customised fields in the table tblPeople that you would like to use in People Search, then this is where you need to add those fields. An explanation of each field in the table zltbIPSIPFields follows:

- **FieldName**

This field stores the field name of the field in table tblPeople. It must be entered exactly as it appears in the table tblPeople, or an error will occur.

➤ **FieldDescription**

This field stores a textual description of the field in **FieldName**. This information is not used anywhere in Faithworks except in this window.

➤ **DisplayOrder**

The Display Order sets the order the field is displayed in (from left to right) in the result query.

➤ **IncPeopleSearch**

This field sets whether the field is displayed in the **Show Individuals** results.

8.4 Set Up Search Fields

This button opens a window showing all the fields from Faithworks that can be included in a search criteria. This screen is only of benefit if you have customised Faithworks, and would like to include their customised fields in the selection criteria for searches.

An explanation of the fields follows:

➤ **SearchFieldDescription**

This is a textual description of the field. The letter (IP) at the end of some of the fields indicate the fields come from table tblPeople, and are in the Individual Profile screen.

➤ **SearchField**

This is the exact field name, as it exists in the table

➤ **SearchTable**

This is the table name that the field is in.

➤ **cboSQL**

The purpose of this field is to list the available values for the field. Depending on the field, this will either be a SQL statement, an actual list of the values or blank.

➤ **cboColumns**

If the cboSQL is a SQL statement, this field indicates what column in the SQL statement, the values reside.

➤ **TypeOfcbo**

This field describes the source of the list of values for the **SearchField**. Available responses are:

- 1) Boolean (True/False, or Yes/No value)
- 2) DateRange (date range value)
- 3) NumberRange (number range value)
- 4) Table (possible value comes from a table)
- 5) TextEntry (any text entry value)
- 6) ValueList (possible value comes from a list)

➤ **cboOperator**

This field describes the available operators for the **SearchField**.

➤ **ValueType**

This field describes the value of the **SearchField**.

9. SENDING EMAILS

9.1 Group Email

Clicking the 'Open Outlook with Emails' button will cause the MS Outlook email window to open with the email addresses of the all the recipients in the bcc field.

9.2 Email Merge

This section enables you to send one email for every recipient in your People Search results. This is a true individualised email merge. You should (don't have to) enter a salutation such as 'Hi there' or 'Dear'. The 'preferred name' of the recipient will automatically be placed in the email address.

Insert Field

Use this drop down list to insert fields into the body of your email, similar to inserting fields in to a Microsoft Word mail merge document.

After selecting the required field, the field will be inserted at the end of your email body (not where the cursor may be). Therefore you may need to reposition the field. If repositioning the field, you need to make sure you do not alter the spelling of the field (ie. Make sure you get the triangular brackets as well)

To test the email merge, click the 'Check Merged Body' button.

Attachment

Click on 'Get File' to attach a document (if required).

Save Email(s) in Draft Folder

Ticking this button will force Faithworks to save the emails in your Outlook draft folder.

Send To Outlook

After you are happy with the details of the email (body, salutation, subject...etc), clicking the 'Send to Outlook' button will create email message(s) in MS Outlook.

If you are permanently connected to the internet, the emails may automatically be sent out (Warning: you might want to check the emails before they go out. If so you may have to disconnect yourself from the internet). If you're not permanently connected, the emails will stay in your Drafts or Outbox until you connect and replicate.

10. CHANGE HISTORY

3 Sept 2005	First version before starting to keep track of changes.
3 July 2006	Added the ability to have partners (including same sex partners) in a relationship, and have the postage label appear as "Mr A Smith and Mr B Jones".