



VERSION 4.4.2 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v4.4.2 of ConnectNow Family Suite and Diocesan Suite.

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ConnectNow Family Suite

System-Wide

Resolved Issues

Various Typographical and Grammatical Errors Fixed

We identified and fixed inadvertent typographical and grammatical errors occurring within applications in ConnectNow Family Suite. Corrections were made to various components of the user interface, such as, messages, notifications, and field labels.

Family Directory

Updates and Enhancements

Family List

Label Format Modified to Provide Space for Two Address Lines

Previously when the user generated address labels for a family, the system sometimes placed Address Line 2 information on the same line as Address Line 1. Address labels are now formatted as follows:

- If information is provided in the family's record for Address Line 1 and Address Line 2, the Address Line 1 and Address Line 2 information appear on separate lines. For example:

John Smith
123 Stadium Blvd.
Apt. # 45
Ann Arbor, MI 48108

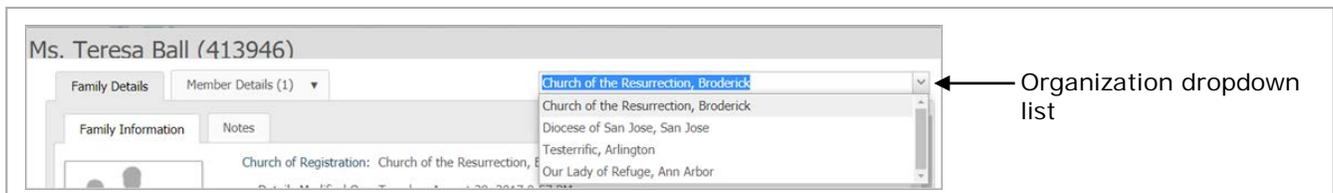
- If no information is provided in the family's record for Address Line 2, the address appears on two lines. For example:

John Smith
123 Stadium Blvd.
Ann Arbor, MI 48108

Family Details

Organization Dropdown List Added to Family Details

We added an organization dropdown list to **Family Details**. The new dropdown list enables users with access to multiple organizations to select the organization whose version of the family records they want to work with.



! IMPORTANT

The only organizations that show in the Organization dropdown list are those that the selected family or member is actively associated with and that the logged-in user has access to.

Member List

Label Format Modified to Provide Space for Two Address Lines

Previously when the user generated address labels for a member, the system sometimes placed Address Line 2 information on the same line as Address Line 1. Address labels are now formatted as follows:

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John Smith
123 Stadium Blvd.
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Ann Arbor, MI 48108

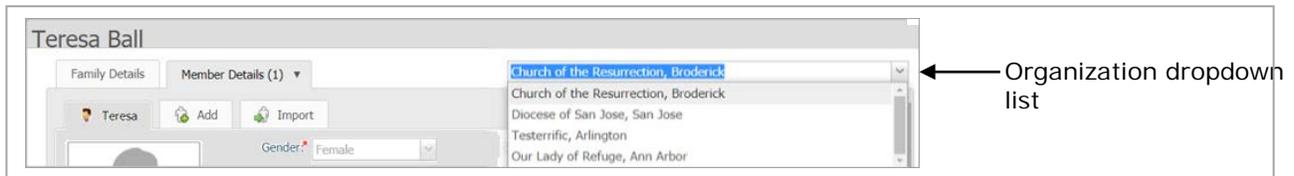
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Member Details

Organization Dropdown List Added to Member Details

We added an organization dropdown list to **Member Details**. The new dropdown list enables users with access to multiple organizations to select the organization whose version of the member records they want to work with.



Family Workgroups

Label Format Modified to Provide Space for Two Address Lines

Previously when the user generated address labels for families in a workgroup, the system sometimes placed Address Line 2 information on the same line as Address Line 1. Address labels are now formatted as follows:

- If information is provided in the family's record for Address Line 1 and Address Line 2, the Address Line 1 and Address Line 2 information appear on separate lines. For example:

John Smith
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Ann Arbor, MI 48108

- If no information is provided in the family's record for Address Line 2, the address appears on two lines. For example:

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Member Workgroups

Label Format Modified to Provide Space for Two Address Lines

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- If information is provided in the family's record for Address Line 1 and Address Line 2, the Address Line 1 and Address Line 2 information appear on separate lines. For example:

John Smith
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- If no information is provided in the family's record for Address Line 2, the address appears on two lines. For example:

John Smith
123 Stadium Blvd.
Ann Arbor, MI 48108

Reports

Funeral Report Modified to Show the Married Name Instead of the Maiden Name

Previously, the Funeral sacrament report showed a married woman's maiden name instead of her married family name. In response to customer feedback, we modified the report to show a woman's married family name if she adopted her husband's last name upon her marriage.

Resolved Issues

Family List

'All Organizations' Filter Applied to the Family List Now Shows One Record Per Family

Previously, when the user selected the **All Organizations** option to obtain a combined organizational view of families, records of families belonging to more than one organization were replicated by a factor equal to the number of organizations they were associated with. This issue misled users to believe that the records themselves were duplicates when they were not. We resolved this issue. When applied to the Family List, the All-Organizations filter now shows one record per family. That is, unless a duplicate record for a family exists in an organization's database.

Member List

Recipient's Name on Mailing Labels Corrected

Previously, the order in which the elements in a recipient's name appeared on member mailing labels changed was not desirable. We modified the order so that the name of the labels now appears in this order: recipient's title (for example, Mr. or Dr.) followed by the first name and then the last name.

Sacraments

Middle Name Column Added to Reconciliation Prep Export File

Previously, the CSV file exported from the Reconciliation Prep grid contained no **Middle Name** column to capture members' middle names. In response to customer feedback, we added a **Middle Name** column to the export file.

Merge Fields Added to Notation Page in the Baptism Templates

The Certificate of Baptism Full Parish Detail and the Certificate of Baptism Full templates includes a **Notations** page, which contains notations for other sacraments that may be received:

- First Eucharist
- Confirmation
- Marriage
- Religious Profession

Previously, the notations were missing merge fields to show the dates and places of other sacraments received. We resolved this issue. For each sacrament listed on the **Notations** page, we added merge fields to show the sacrament details, such as, the date the sacrament was celebrated, the parish name and address, and sacrament location— if they are available in a member's record.

CSV File Now Includes Records Selected in the Sacraments Grid

Previously when the user tried to export selected records from the **Sacraments** grid to a CSV file, the system exported all records instead of just the selected ones. We resolved this issue. Now, only the selected records are exported. If the user selects no records, all records are exported.

Member's Holy Orders Record Now Displays Expected Data

Previously, when the user opened a member's Holy Orders record and viewed data on any tab, closed the record, and then opened another member's record, the system populated whatever tab the user was viewing with information on the **Diaconate** tab in the previously viewed record. We fixed this issue. The data shown on each **Holy Orders** tab is now unique to member and to the tab the user is currently viewing.

Family Workgroups

Edit Workgroups Button No Longer Becomes Disabled After User Views Family Details

We resolved an issue that caused the **Edit Workgroup** button  in the **Workgroups** panel to become disabled after the user clicked  in the **Families in Workgroups** grid to view a family's details.

Reports

Sacraments Reports Contains Multiple Entries for Certain Members

For some organizations, we resolved an issue that caused the same member to appear multiple times in the following sacrament reports:

- Baptism
- First Eucharist
- Confirmation
- Marriage

Religious Education

Updates and Enhancements

Label Format Modified to Provide Space for Two Address Lines

Previously when the user generated parent, student, or leader address labels, the system sometimes placed Address Line 2 information on the same line as Address Line 1. Address labels are now formatted as follows:

- If information is provided in the family's record for Address Line 1 and Address Line 2, the Address Line 1 and Address Line 2 information appear on separate lines. For example:

John Smith
123 Stadium Blvd.
Apt. # 45
Ann Arbor, MI 48108

- If no information is provided in the family's record for Address Line 2, the address appears on two lines. For example:

John Smith
123 Stadium Blvd.
Ann Arbor, MI 48108

Resolved Issues

Reports

Populated Registration Forms No Longer Include Names of Deceased Children

Previously when the user generated a **Populated Registration Forms** report, the report incorrectly showed the names of children whose member status in the family record was set to **Deceased**. We resolved this issue.

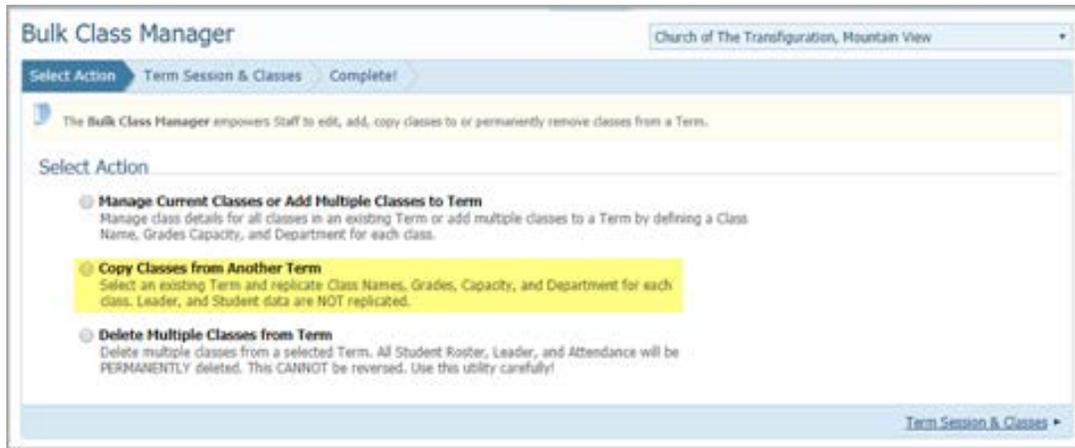
Tools

Description of the 'Copy Classes' Option Modified for Accuracy

Previously, the description provided for the 'Copy Classes' option was misworded and therefore inaccurate. The description included the word "Sessions", which led users to believe that the action of copying a term's classes also included copying the term's session data, which was not the case.

To clarify: a term's session data cannot be copied. You must create session data from scratch first before using the Bulk Class Manager to copy classes.

To prevent future confusion, we modified the description of the **Copy Classes from Another Term** option by removing the word "Session", as shown in the following illustration:



Offering

Updates and Enhancements

Reports

Contributions and Pledges

Label Format Modified to Provide Space for Two Address Lines

Previously when the user generated address labels for contribution statements and pledge statements, the system sometimes placed Address Line 2 information on the same line as Address Line 1. Address labels are now formatted as follows:

- If information is provided in the family's record for Address Line 1 and Address Line 2, the Address Line 1 and Address Line 2 information appear on separate lines. For example:

John Smith
123 Stadium Blvd.
Apt. # 45
Ann Arbor, MI 48108

- If no information is provided in the family's record for Address Line 2, the address appears on two lines. For example:

John Smith
123 Stadium Blvd.
Ann Arbor, MI 48108

Resolved Issues

Funds

User Edits to the Fund End Date Now Saved As Expected

Previously, after the user saved an edit to the fund end date, the system appeared to save the change but did not. We fixed this issue.

Posting

Red Text Removed from Non-Error Message

Previously after closing a quick-entry batch, users were presented with a message in red text, which informed them that the system successfully closed the batch. Users reported finding the red text misleading because it gave the impression that the system experienced an error when, in fact, it had not. To prevent further confusion, we changed the color of the message from red to green.

Intermittent Timeout Error for Quick Entry Batches Resolved

Previously, users occasionally experienced a timeout error when trying to open and enter data into quick entry batches. Although an intermittent issue, we determined that these errors typically occurred if users were performing these tasks when server usage was high. We improved the efficiency of the quick entry posting process to prevent it from being negatively impacted when users' demands on server resources were high.

Timeout Error Experienced When Attempting to Open the Quick Entry Posting Page Resolved

Previously, users in large organizations or in organizations with large quick-entry batches experienced a timeout error when attempting to open the **Quick Entry Posting** page. We fixed the cause of this error.

Reports

Contributions

E-Statements 'Processing Request' Error Fixed

We resolved an issue that caused a 'processing request' error message to occasionally display after the user attempted to generate E-statements by clicking the **Generate E-statements** button.

'Include \$0 Contributions' Checkbox Works As Expected

Previously when the user selected the **Include \$0 Contributions** checkbox, the system incorrectly excluded from the **Givers** grid all donors who had zero-dollar (\$0) contributions only. As a result, users could not generate contribution E-statements or paper statements for those donors. The **Include \$0 Contributions** checkbox now works as expected. When the checkbox is selected, the system now correctly filters the **Givers** grid to include givers with zero-dollar (0\$) contributions only.

Member Option for E-Statement Generation Disabled

Previously in the **Contribution Source** group, **Member** was shown a selectable option even though functionality for generating E-statements for members has not been implemented yet. We will add the ability to generate E-statements for members in a future release.

To prevent future confusion, we modified the system's behavior as follows:

- If you select **Electronic Statements** as the delivery method, the **Member** option for **Contribution Source** is disabled (grayed out).
- If you select the **Member** option for the **Contribution Source**, the **Electronic Statements** option is disabled (grayed out).

The system will behave as described above until E-statements for members is an available feature. Thank you for your patience in this matter.

Negative Contributions Now Include in Calculation of Contribution Totals

Previously, the Contribution Statement did not include negative contributions in the calculation of contribution totals if those contributions did not have a positive contribution to offset them. We fixed this issue. Negative contributions that do not have an offsetting transaction to cancel them out are now included in the calculation of the contribution total.

Ministry Scheduler

Updates and Enhancements

Label Format Modified to Provide Space for Two Address Lines

Previously when the user generated address labels for ministers and families, the system sometimes placed Address Line 2 information on the same line as Address Line 1. Address labels are now formatted as follows:

- If information is provided in the family's record for Address Line 1 and Address Line 2, the Address Line 1 and Address Line 2 information appear on separate lines. For example:

John Smith
123 Stadium Blvd.
Apt. # 45
Ann Arbor, MI 48108

- If no information is provided in the family's record for Address Line 2, the address appears on two lines. For example:

John Smith
123 Stadium Blvd.
Ann Arbor, MI 48108

Resolved Issues

Scheduling

Controls Added to Ensure Deceased Members Are Not Scheduled

We added controls to ensure that the auto schedule does not schedule any minister whose status is set to **Deceased**. Only members with a status of **Active** or **ActOther** are eligible for scheduling.

Reports

System No Longer Stuck on Loading Spinner on Reports Page in Chrome Browser

Previously when setting the **Date Range** filter for a report, if a user selected a start date that was after the currently shown end date, the system became stuck on the loading spinner with no error message displayed. This problem, which was experienced in the Chrome browser only, was fixed.

Tuition

Resolved Issues

Invoices

System Now Allows Users to Delete Invoices with No Associated Payments

Previously, users could not delete an invoice to which payments had been applied and then later deleted. We resolved this issue. If an invoice has no payments associated with it, the system lets users delete it.

Diocesan Development

Resolved Issues

Donor Reports

Donor Name Search Improved

Previously, the names a user expected to see were missing from the results of a donor name search. We determined that the search parameters were too restrictive, which sometimes caused expected names to be excluded from the results. We expanded the search parameters to increase the likelihood of better donor name matches.

'Timeout Expired' Error Resolved

We resolved an issue that caused the system to run slowly and then experience a timeout error when attempting to generate a contribution statement.

User-Specified Font for Body of Statement Text No Longer Changed

Previously when contribution statements were exported to PDF, the system changed the user's font selection for the body of statement to Times New Roman. We fixed this issue. The system no longer defaults the font selection to Times New Roman.

Online Giving Management

Transmission Errors Caused by Routing Numbers Starting with Zero Resolved

We resolved an issue that caused the Online Giving system to experience an error when attempting to process transactions coming in through Online Giving Management that referred to a routing number containing a leading zero (0).

Funds

Clear Button for the Datepicker Calendar Now Working As Expected

Previously on the **Fund Management** page, when the user clicked the **Clear** button for the datepicker calendar to clear the date entered into the **Start Date** or **End Date** field, the system did not remove the date. We fixed this issue.

Resolved Issues

Process for Creating a Family Workgroup from IQ Results Now Works As Expected

Previously, the Create Family Workgroup process sometimes did not work as expected. Occasionally, the results set was empty, or the workgroup itself was not created. We resolved this issue.

Column Values Converted from Integer to Decimal Type

To maintain the required accuracy in reporting for financial calculations, we converted the **Total Pledged to Fund** and **Amount Over Goal** fields (located in the **Fund > Organization Summary** group) from integer type to decimal type.

Queries Against Secure Fields Now Working As Expected

We resolved an issue that prevented users from being able to successfully run queries against member Secure Fields. The fields are accessible to any diocesan staff that have an assignment to the diocese and have the **Has Secure Field Access** permission enabled for that assignment in their staff record.

Administration

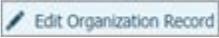
Updates and Enhancements

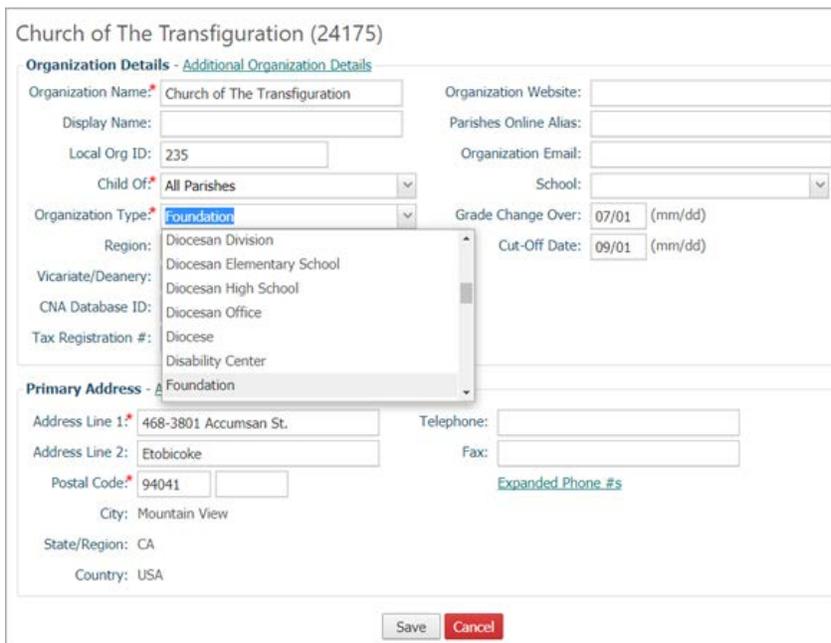
Organizations

'Foundation' Option Added to Organization Type Dropdown List

Users reported that the system provided no way for them to identify an organization as a foundation. In response to user feedback, we added a **Foundation** option to the **Organization Types** dropdown list in Organization Details.

Follow these steps to set the organization type to foundation:

1. Click  to open the Organization Details window.
2. In the **Organization Type** dropdown list, select the **Foundation** option, as shown here:



Church of The Transfiguration (24175)

Organization Details - Additional Organization Details

Organization Name: Church of The Transfiguration
Display Name:
Local Org ID: 235
Child Of: All Parishes
Organization Type: **Foundation**
Region: Diocesan Division
Vicariate/Deanery: Diocesan Elementary School
CNA Database ID: Diocesan Office
Tax Registration #: Diocese
Disability Center
Foundation

Organization Website:
Parishes Online Alias:
Organization Email:
School:
Grade Change Over: 07/01 (mm/dd)
Cut-Off Date: 09/01 (mm/dd)

Primary Address - A

Address Line 1: 468-3801 Accumsan St.
Address Line 2: Etobicoke
Postal Code: 94041
City: Mountain View
State/Region: CA
Country: USA

Telephone:
Fax:
[Expanded Phone #s](#)

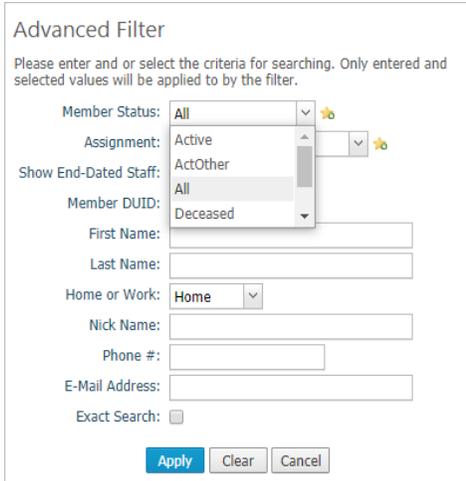
Save Cancel

3. Click  to save the selection.

Manage Staff

'All' Option Added to the Member Status Dropdown List in the Advanced Filter Group

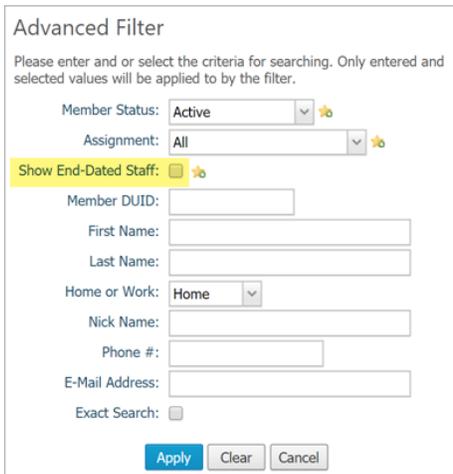
As shown below, we added an **All option** to the **Member Status** dropdown list in the Advanced Filter group. Selecting this option lets you display all your staff in a single list regardless of their member status.



The screenshot shows the 'Advanced Filter' interface. At the top, it says 'Please enter and or select the criteria for searching. Only entered and selected values will be applied to by the filter.' Below this, there are several fields: 'Member Status' (dropdown menu with 'All' selected), 'Assignment' (dropdown menu with 'Active' selected), 'Show End-Dated Staff' (checkbox), 'Member DUID' (text input), 'First Name' (text input), 'Last Name' (text input), 'Home or Work' (dropdown menu with 'Home' selected), 'Nick Name' (text input), 'Phone #' (text input), and 'E-Mail Address' (text input). There is also an 'Exact Search' checkbox. At the bottom, there are three buttons: 'Apply', 'Clear', and 'Cancel'.

'Show End-Dated Staff' Filter Added to the Advanced Filter Group

As shown below, the **Advanced Filter** group features a new filter, labeled **Show End-Dated Staff**:



The screenshot shows the 'Advanced Filter' interface. At the top, it says 'Please enter and or select the criteria for searching. Only entered and selected values will be applied to by the filter.' Below this, there are several fields: 'Member Status' (dropdown menu with 'Active' selected), 'Assignment' (dropdown menu with 'All' selected), 'Show End-Dated Staff' (checkbox checked), 'Member DUID' (text input), 'First Name' (text input), 'Last Name' (text input), 'Home or Work' (dropdown menu with 'Home' selected), 'Nick Name' (text input), 'Phone #' (text input), and 'E-Mail Address' (text input). There is also an 'Exact Search' checkbox. At the bottom, there are three buttons: 'Apply', 'Clear', and 'Cancel'.

The filter is a simple checkbox control that lets you filter the **Staff List** to show the names of deleted staff and staff with assignments completed in the past (the date in the **Release Date** column is in the past). The checkbox control has two states:

Note

Click  to save the option you select as the default or your favorite.

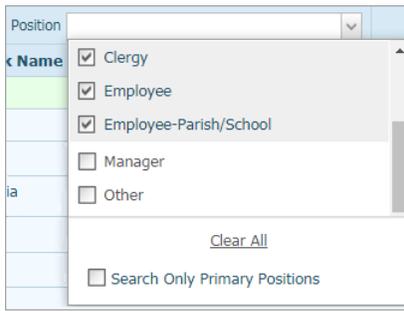
- Selected (checked): shows the names of deleted or inactive staff (those with assignments that were completed in the past).
- Deselected (not checked): shows the names of staff with assignments having no end date and with assignments having an end date in the future.

Format and Functionality of the Position Filter Modified

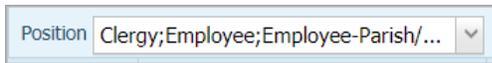
We made the following changes to the **Position** filter on the **Staff List** toolbar:

- Previously, the filter listed positions in a dropdown list format, which allowed you to make one filter selection only. We converted the filter to a dropdown list with checkbox options, which allow you to filter the Staff List using a combination of filters.

As shown in the following illustration, each Position filter has its own checkbox control. To apply the filters, simply select the desired checkboxes and then click your mouse anywhere outside the dropdown list.



The **Position** filter options are sorted in ascending order in the following sequence: 1) special characters, 2) numerals, and 3) letters. Note that after you select multiple filters, they appear as a group at the top of the **Position** dropdown list so that you can see which filters are applied to the **Staff List**:



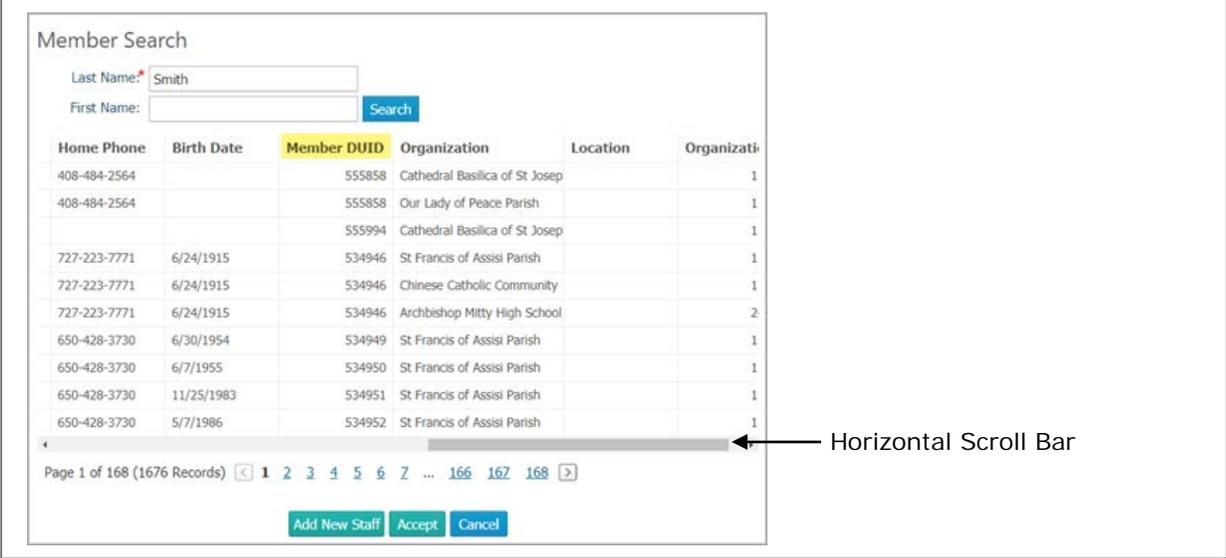
- Under the **Position** dropdown list, we added a **Clear All** link. When you want to completely clear the grid of any applied filters, simply click this link. Note that if you leave and then return to the **Staff List** page, the system automatically clears any filters you selected.
- We also added a checkbox, labeled **Search Only Primary Positions**. This checkbox lets you apply a secondary filter to the selected **Position** filters. When this secondary filter is applied, the **Staff List** grid shows only those staff who have the selected positions designated as "primary" in their records.

Member DUID Information Added to the Member Search Modal

To assist you with quickly locating the right member to add as new staff, we added Member DUID information to the **Member Search** modal. The modal, shown below, opens during the search phase of the Add New Staff process.

Note

*You may need to click and drag the horizontal scroll bar to bring the **Member DUID** column into the viewing area.*



The screenshot shows the 'Member Search' modal with search criteria for 'Last Name: Smith'. The results table includes columns for Home Phone, Birth Date, Member DUID, Organization, Location, and Organization. A horizontal scroll bar is located at the bottom of the table, and an arrow points to it with the label 'Horizontal Scroll Bar'.

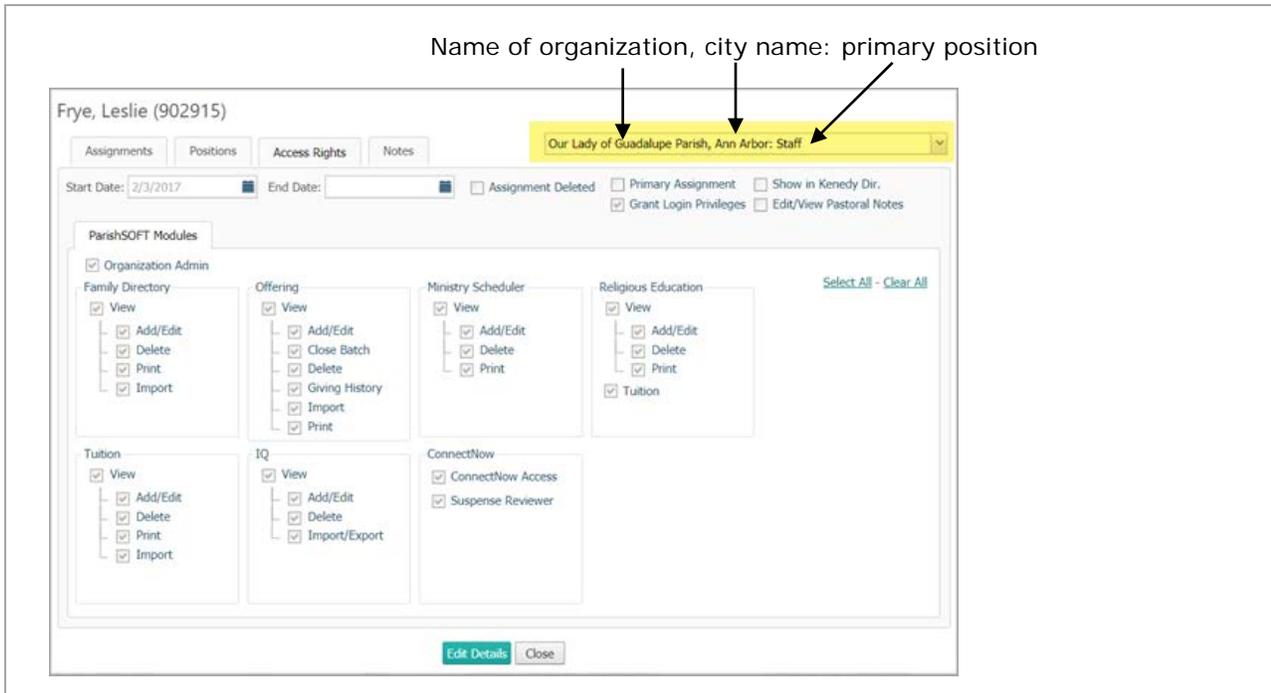
Home Phone	Birth Date	Member DUID	Organization	Location	Organization
408-484-2564		555858	Cathedral Basilica of St. Joseph		1
408-484-2564		555858	Our Lady of Peace Parish		1
		555994	Cathedral Basilica of St. Joseph		1
727-223-7771	6/24/1915	534946	St. Francis of Assisi Parish		1
727-223-7771	6/24/1915	534946	Chinese Catholic Community		1
727-223-7771	6/24/1915	534946	Archbishop Mitty High School		2
650-428-3730	6/30/1954	534949	St. Francis of Assisi Parish		1
650-428-3730	6/7/1955	534950	St. Francis of Assisi Parish		1
650-428-3730	11/25/1983	534951	St. Francis of Assisi Parish		1
650-428-3730	5/7/1986	534952	St. Francis of Assisi Parish		1

Duplicate Member Records No Longer Appear in 'Add New Staff' Search Results Set

We added controls to prevent duplicate member records from appearing in the **Add New Staff** search results set. The process now returns a list of unique member records.

Organization's City Name Added to the Assignments Dropdown List

Occasionally, a staff user may hold assignments in organizations with the same name. To help you quickly distinguish between assignments, we added the organization's city name to the Assignments dropdown list in the staff record. As shown in the illustration below, the city name follows the name of the organization:



Added Ability to Save Selected Advanced Filter Option As a Favorite

When selecting an option for any one of the following filters in the **Advanced Filter** group, you can now save the selected option as a favorite (the default):

- Member Status
- Assignment (Primary or Non-Primary)
- Show End-Dated Staff

To mark an option as a favorite:

1. Select the option from the filter's dropdown list. Then, click this icon to the right of the filter: .

The system displays a message to inform you that your selection was saved as the default.

2. Click  to dismiss the message.

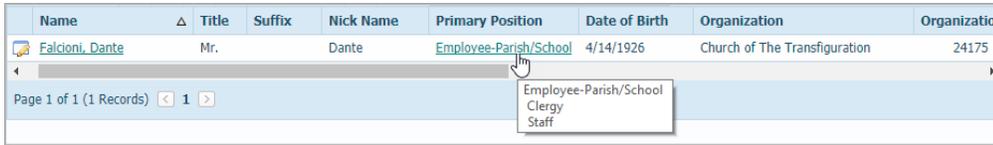
Note that the selected option is now the new default for the filter. If you apply the filter to the Staff List grid and then click  (Reset Advanced Filters to Defaults), the filter resets to your default (favorite) selection.

Address Tab in Staff User's Member Details Now Visible to Diocesan Administrators Only

In response to customer feedback, we removed the **Address** tab from **Member Details** so that it is no longer visible to parish users. Some parish users reported confusion about whether the address shown belonged to the family or the member. The tab shows the member's address. However, to prevent future confusion, the tab is now visible to diocesan administrators only.

Text in Position Field Now Displayed As a Link If the Staff Member Holds Multiple Positions

If a staff member holds multiple positions in the organization, the text appearing in the **Primary Position** column is now displayed as a link. As shown in the following illustration, placing your mouse on the link (without clicking) opens a pop-up window that shows you other positions held by the member.

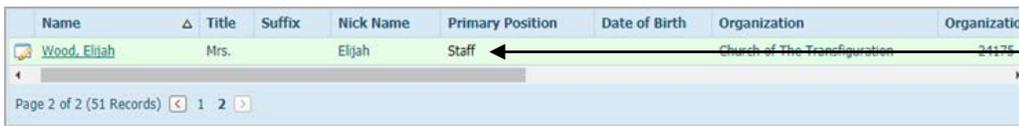


Name	Title	Suffix	Nick Name	Primary Position	Date of Birth	Organization	Organizatic
Falcioni, Dante	Mr.		Dante	Employee-Parish/School	4/14/1926	Church of The Transfiguration	24175

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Employee-Parish/School
Clergy
Staff

If the staff member holds one position only, the position shown in the column is displayed in plain text:



Name	Title	Suffix	Nick Name	Primary Position	Date of Birth	Organization	Organizatic
Wood, Elijah	Mrs.		Elijah	Staff		Church of The Transfiguration	24175

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CSV Export File Now Shows Additional Positions Held by Staff

We added a new column, labeled **Additional Positions**, to the CSV export file. This column, which appears after the **Primary Position** column, shows additional positions (that is, those not marked as "primary") held by staff members.

Merge Families

Member and Family DUIDs Added to Merge Family Records Page

We added the Member DUID and Family DUID to the **Merge Family Records** page. The DUIDs are provided to assist you with identifying members and families you may want to merge. As shown in the following illustration, the DUID is located next to the family name and each member name listed in the **Permanent** and **Duplicate Family Member** groups and in the **What to Do** dropdown lists. The extra information provided by DUIDs will, in most cases, help you make faster and more accurate merge decisions.

Merge Family Records

Please identify the families you would like to merge.

Family DUID Search

Permanent Family DUID: 438673 Duplicate Family DUID: 441846 Additional Duplicate Family DUID:

Choose to add or merge each member of the duplicate family.

Permanent Family Members (438673)

Member	Member DUID	Suffix	Birth Date
Alan Austin	888073		
Gaoder Austin	888074		

Duplicate Family Members (441846)

Member	Member DUID	Suffix	Birth Date	What to Do
Chad Austin	895520			
Laura Austin	895521			
Cecilia Austin	895522		03/19/2010	<input type="button" value="Add as New"/> <input type="button" value="Merge with Alan Austin (888073)"/> <input type="button" value="Merge with Gaoder Austin (888074)"/>

Resolved Issues

Lookups

Member Lookup Table for Religion Now Updated As Expected with Merged Lookup Values

Previously, if the diocese merged a lookup value for Religion, the system sometimes did not update the **Religion** dropdown list in Member Details with the change. We resolved this issue. After a Religion lookup value is merged, the Religion dropdown list in member records consistently reflects the change, and any record using the merged value is updated accordingly.

Manage Staff

Removing a User's Giving History Permission Now Blocks Access to Family Giving History

Previously users whose ConnectNow Offering > View permissions were disabled could access a family's giving history information from within ConnectNow Family Directory. Such access should not have been allowed. We added controls to block users who lacked such permissions from viewing a family's giving history.

Filters Applied to Staff List No Longer Reset After the User Opens a Staff Record

Previously if the user applied any of the filters (for example, rolodex and Advanced) to the **Staff List** and then opened and then closed a staff member's record, the system reset the filters to the default values when it should not have. We fixed this issue.

Assignment Shown in Primary Position Column Now Correct

The Primary Position column shows the staff member's primary assignment in the organization listed in the **Organization** column. Previously, the position shown was sometimes incorrect. We resolved this issue.

Organizations

Organization Administrators Can Edit Any Organization to Which They Have Access Permissions

Previously diocesan administrators were permitted to edit the information for licensed organizations only. We removed this restriction. Users with Diocesan Admin rights can now edit any organization to which they have access.

Diocesan Suite

Census

Updates and Enhancements

Family Details

MLNA, 'Do Not Call', and 'Do Not Solicit' Checkbox Controls Added to the Family Record

In response to customer requests, we added the following checkbox controls to the family record (Family Details):

- **MLNA** (Moved, Left No Address)
- **Do Not Call**
- **Do Not Solicit**

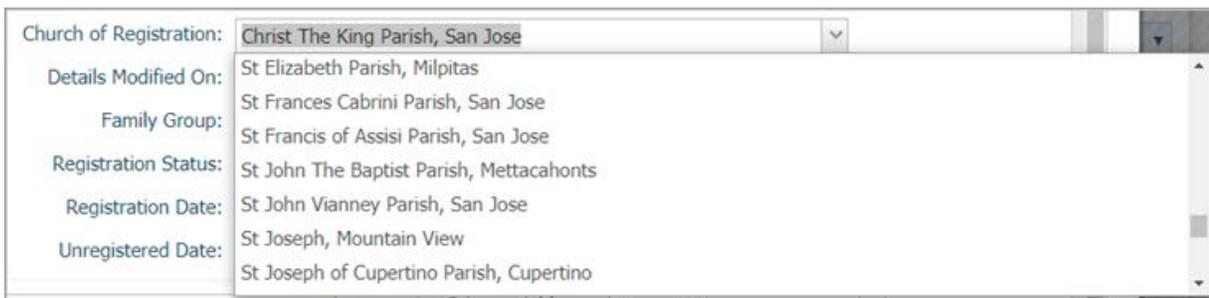
The checkboxes are in the lower-right corner of the family record. They are visible only to users with an assignment to the diocese and—at a minimum—**Family Directory > View** access rights.

Diocesan Notes Section Added to the Notes Tab

We added a new section, labeled **Dio Notes**, to the **Notes** tab in the family record. Because of its confidential content, the note section is visible only to users who have an assignment in the diocese and **Family Directory > View** permissions tied to their login credentials. Users who have edit rights for an assignment can also edit the content in the **Dio Notes** section.

Church of Registration Field Converted to Dropdown List

Previously, the **Church of Registration** field in the family record was a fixed field that showed the family's organization of registration. As shown below, we converted the field to a dropdown list that contains the names of organizations the logged-in user has **View > Add/Edit** permissions to:

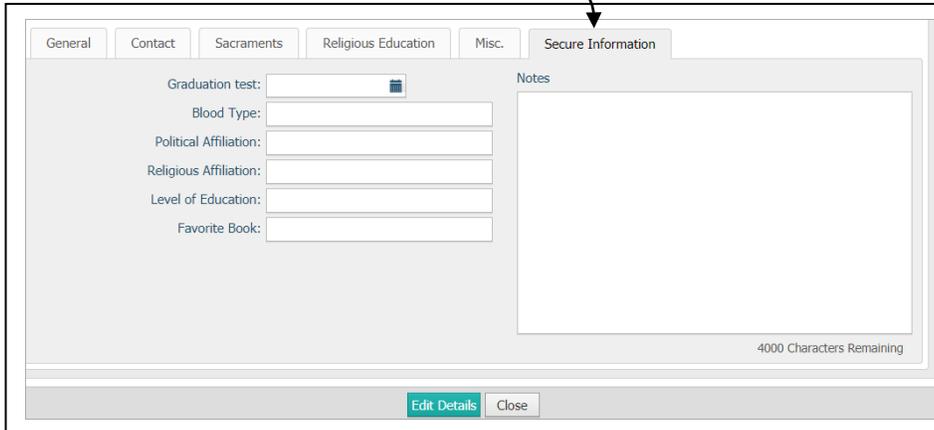


The new dropdown list provides a quicker way for a user to change a family's organization of registration: simply by selecting the desired organization from the list. Note that, like all other changes to a record, an organization change can only be made after the user clicks [Edit Details](#) to put the record in edit mode.

Member Details

Secure Information Feature Added

As shown in the illustration below, this release introduces a new tabbed area to Member Details, labeled **Secure Information**.



The **Secure Information** tab can contain up to 10 custom fields plus a **Notes** area for more details.

Secure fields are not encrypted. Because the fields may contain sensitive personal information, only authorized staff can see the tab itself and view/edit its contents.

The **Secure Information** tab is visible in an organization's member records only if the feature is enabled for the diocese. The tab accommodates up to 10 custom fields into which authorized staff can add sensitive personal information to member records. A **Notes** field, where staff can type supplementary information, is also provided.

Secure fields are not encrypted. Because the information on the tab is regarded as highly sensitive, only those staff meeting these requirements can see the tab and view and edit its contents:

Note

*Users with Read access to the SQL database can also view **Secure Information** fields.*

- Have an active assignment to the diocese
and
- Have the **Secure Field Access** permission selected for the active assignment in their staff record.

It is the diocesan administrator's responsibility to enable the Secure Information feature, define the type of information to be collected, and assign permissions. See "[Setup Page for Secure Information Added](#)" for instructions on performing these administrator tasks.

Resolved Issues

Family Details

Staff with Edit Permissions in an Organization Can Now Edit the Organization's Data Externally

Previously if staff users with Family Directory View > Add/Edit permissions to multiple organizations tried to edit a family record not owned by the organization they were logged in to, the system disabled certain fields, which prevented them from being edited. To get around the problem, users had to switch to the organization owning the record. We resolved this issue. Users with **View > Add/Edit** permissions to an organization can now edit that organization's family data externally. They no longer need to switch to the organization that owns the data.

Member Details

Staff with Edit Permissions in Multiple Organizations Can Now Edit Unowned Member Records

Previously if staff users with Family Directory View > Add/Edit permissions to multiple organizations tried to edit a member record not owned by the organization they were logged in to, the system disabled certain fields, which prevented them from being edited. To get around the problem, users had to switch to the organization owning the record. We resolved this issue. Users with **View > Add/Edit** permissions to an organization can now edit that organization's member data externally. They do not have to switch to the organization that owns the data.

Family Workgroups

Family Workgroups Added in Desktop Family Directory Now Visible in ConnectNow

Family workgroups added in desktop Family Directory are now visible in ConnectNow Family Directory where they can be modified and managed as desired. Previously, the desktop application failed to transfer data for newly added workgroups to the ConnectNow system.

'Add Families' Search Now Returns One Record Only

Previously, if a family belonged to multiple organizations, a search for that family during the Add Families process returned a record for each organization the family belonged to. We revised the search process to return one family record only.

Member Workgroups

'Add Member' Search Now Returns Owned Organization's Member Records Only

Previously, if a member belonged to multiple organizations, a search for that member during the Add Member process returned a record for each organization the member belonged to. We revised the search process to return one record only.

Diocesan Development

Resolved Issues

Imports

Trailing Commas in Lockbox 8 Import File No Longer Cause Failed Import

Previously if the user tried to import a Lockbox Type 8 file that contained trailing commas (inserted to indicate blank fields), the import process failed. We resolved this issue.

Funds

Start and End Dates for a Fund No Longer Disappearing

We resolved an issue that caused the **Start** and **End** dates for some funds to disappear.

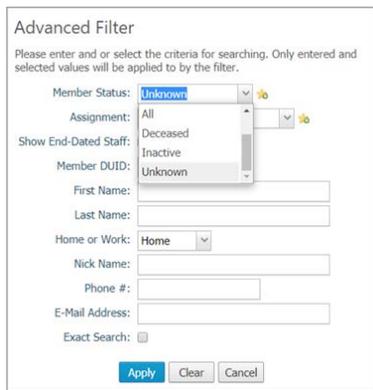
Administration

Updates and Enhancements

Manage Staff

'Unknown' Option Added to Member Status Filter's Dropdown List

As shown below, we added a new option, labeled **Unknown**, to the **Member States** filter in the **Advanced Filter** group. Selecting the **Unknown** option lets you filter the Staff List to show only those staff whose member status is unknown or null:



Advanced Filter

Please enter and/or select the criteria for searching. Only entered and selected values will be applied to by the filter.

Member Status: **Unknown**

Assignment: All

Show End-Dated Staff: Deceased

Member DUID: Inactive

First Name:

Last Name:

Home or Work: Home

Nick Name:

Phone #:

E-Mail Address:

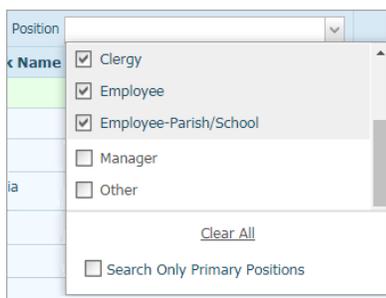
Exact Search:

Apply Clear Cancel

Format of the Position Filter on the Staff List Toolbar Changed

The format of **Position** filter on the **Staff List** toolbar was changed from a dropdown list allowing one filter selection only to a dropdown list allowing multiple selections. The filter options are sorted in ascending order in the following sequence: 1) special characters, 2) numerals, and 3) letters.

Each **Position** filter has a separate checkbox. To apply one or more filters, simply select the desired checkboxes, as shown below:



Position

Clergy

Employee

Employee-Parish/School

Manager

Other

Clear All

Search Only Primary Positions

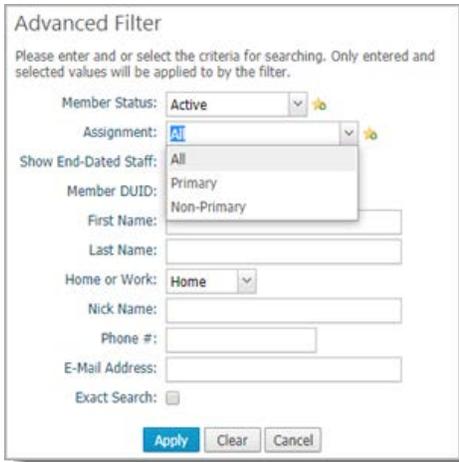
Note that when multiple filters are selected, they are shown at the top of the **Position** dropdown list and followed by an alphabetical listing of options that have not been selected.

To clear all selected filters, click the **Clear All** link under the dropdown list (see previous illustration). If you leave and then return to the **Staff List** page, the system automatically clears any previously selected filters.

If you want to view only those staff who hold the selected positions as their primary one, select the **Search Only Primary Positions** checkbox (see the previous illustration).

Assignment Filter Added to Advanced Filter Group

As shown below, we added a new filter, labeled **Assignment**, to the **Advanced Filter** group:



The screenshot shows the 'Advanced Filter' dialog box. At the top, it says 'Please enter and or select the criteria for searching. Only entered and selected values will be applied to by the filter.' Below this are several fields: 'Member Status' (Active), 'Assignment' (AT), 'Show End-Dated Staff' (All), 'Member DUID' (Primary), 'First Name', 'Last Name', 'Home or Work' (Home), 'Nick Name', 'Phone #', 'E-Mail Address', and 'Exact Search' (unchecked). The 'Assignment' dropdown is open, showing 'All', 'Primary', and 'Non-Primary'. At the bottom are 'Apply', 'Clear', and 'Cancel' buttons.

Applying the **Assignment** filter to your Staff List enables you to view staff records by assignment type. The filter has three assignment type options:

Note

Click  to save the option you select as the default or your favorite. The option will then appear first in the dropdown list.

- **All**: shows primary and non-primary assignments.
- **Primary**: shows primary assignments only.
- **Non-Primary**: shows non-primary assignments only.

Module Settings

Setup Page for Secure Information Added

In this release, we added a tabbed area to Member Details, labeled **Secure Information** (for a description of this feature, see "[Secure Information Feature Added](#)"). Because of the personal and sensitive nature of the data that may be collected, the Secure Information feature is subjected to levels of protection designed to safeguard member data and privacy. At the highest level, the feature itself is disabled. Therefore, before any organization in the diocese can use Secure Information, the diocesan administrator (a user with Diocesan Admin permissions) must enable it. At the field level, the diocesan administrator defines the data to be collected and determines exactly who can view and modify that data.

We added a section to the **Module Settings** page to enable you to set up the Secure Information feature. Use the following steps to set it up for your diocese.

Note

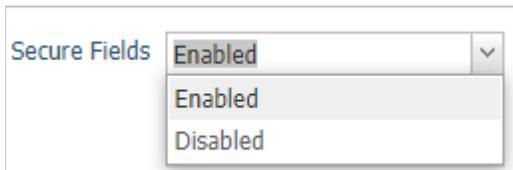
You must be logged in as an administrator and have Diocesan Admin permissions to perform these steps.

Step 1: Enable the Secure Fields Feature

1. Click [Module Settings](#) to display the **Module Settings** page.
2. In the **Census** group, select the **Secure Fields** option to display the **Census > Secure Fields** setup in the right panel.

By default, the **Secure Fields** feature is disabled.

3. As shown below, select the **Enabled** option:



Then, click [Save Settings](#).

The **Secure Fields** feature is now enabled for the dioceses.

4. Go to [Step 2. Assign Labels to Secure Information Field Labels](#), which follows, to define the information to collect.

Step 2. Creating Labels for Secure Information Fields

As a user with Diocesan Admin permissions, you can create custom fields so that you can collect specific data about your members on the **Secure Information** tab in Member Details.

The **Secure Information** tab can accommodate up to 10 secure fields. In this step, you will create labels for the fields.

1. In the **Secure Fields Labels** section, type a label for each field.

Note

The first secure field accepts a date only, but you can define any label you want for the field. For example, Graduation Date.

*If you leave a field blank, the field does not appear on the **Secure Information** tab in Member Details.*

2. When done, click .

The labels you defined appear on the **Secure Information** tab in each member's record.

Only authorized staff can access secure fields. To provide authorization, go to "[Step 3: Give Diocesan Staff Permission to Access Secure Information.](#)"

Step 3: Give Diocesan Staff Permission to Access Secure Information

Secure fields in Member Details are not encrypted. Only authorized staff can view and change the fields.

Note

*Users with Read access to the SQL database can also view **Secure Information** fields.*

To provide access, do the following:

- Give the staff member an active assignment to the diocese.
and
- For the active assignment, enable **Secure Field Access** permissions in the staff member's record.

Step-by-step procedures for performing these tasks are provided in the Administration Help. To access the Help, open the Administration module, and then select the [HELP](#) link in the upper-right.

Merge Families

Merge Family Queue Grid Updated

We made the following changes to the **Merge Family Queue** grid:

- Added a new column, called **Status**, to provide the status of each merge record listed in the grid. A record has one of these types of status:
 - ❖ [Pending](#): indicates that the record is waiting to be processed in the overnight merge.
 - ❖ [Failed](#): indicates that the system experienced an error and could not merge the record.

The status types are displayed as links. As shown in the following illustration, positioning your mouse on a link (without clicking) opens a pop-up window where you can view additional status information:

Family	Status	Date Merge Created	Envelope #	E-Mail Address	Primary Phone	Primary Address
Bray, Marianne	Pending	10/13/2017	1485	test@parishsoft.com	408-730-9534	518 Ironwood Terrac
Bray, Michele (Duplicate)		10/13/2017	390	test@parishsoft.com	408-203-9534	518 Ironwood Terrac
Bray, Richard and Marilyn (Duplicate)		10/13/2017	525	test@parishsoft.com	408-245-1156	880 Helena Dr

- For merges involving a master family, identified the merged duplicate families.

The grid lists the master family record and groups it with associated duplicate records. Clicking  to the left of the master record opens the group to show the merged duplicates. The duplicate records are listed in the order in which the user added them to the master family record, and the word "Duplicate" is appended to clearly identify them as duplicates.

Family	Status	Date Merge Created	Envelope #	E-Mail Address	Primary Phone	Primary Address
Bray, Marianne	Pending	10/13/2017	1485	test@parishsoft.com	408-730-9534	518 Ironwood Terrac
Bray, Michele (Duplicate)		10/13/2017	390	test@parishsoft.com	408-203-9534	518 Ironwood Terrac
Bray, Richard and Marilyn (Duplicate)		10/13/2017	525	test@parishsoft.com	408-245-1156	880 Helena Dr

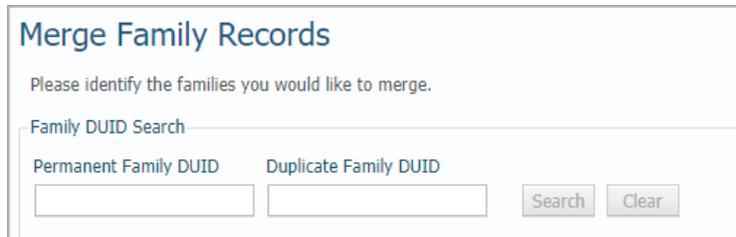
Merge Family Records Process Updated to Enable Multiple Family Merges

We updated the Merge Family Records process to enable you to merge up to five duplicate families simultaneously. The following instructions show you how:

Note

The **Merge Families** button is visible only to staff users with Merge Family Access permissions tied to their login credentials.

1. Click **Merge Families** . From the dropdown list, select the **Merge Family Records** option to open the **Merge Family Records** page:



2. In the **Family DUID Search** fields, type the Family DUIDs of the families you want to merge:
 - **Permanent Family:** Family DUID of the family you want to keep.
 - **Duplicate Family ID:** Family DUID of the duplicate family.

Then, click **Search** .

If the system locates both Family DUIDs, it displays information for the permanent family and potential duplicate records at the bottom of the page.

3. Review the search results. Then, for each record listed in the **Duplicate Family Members** group, select one of these options from the **What to Do** list:
 - **Add as New:** adds the member's record to the permanent family's record.
 - **Merge with:** removes the duplicate record by merging it with the permanent family's record.
4. In total, you can merge up five family records. For each additional record you want to merge, repeat the following:
 - a) Type the Family DUID in the **Additional Duplicate Family DUID** field. Then, click **Add** .
The application searches for the Family DUID. If the system locates the Family DUID, it displays the associated records at the bottom of the page.
 - b) Review each record listed in the **Duplicate Family Members** group and select the appropriate **What to Do** option (described in Step 3).

5. When ready to merge all records, click .

The system creates merge records for each Permanent-Duplicate pair and places the pending merge records into a queue to await processing in an overnight batch job.

Note

*The system processes multiple family merges in the order in which you add the duplicate records to the permanent family. If any merge in the group fails, the system stops all subsequent merges until you resolve the issue causing the record to fail to merge. Failed merges are flagged as "Failed" in **Status** column in the **Merge Family Queue** grid (see "[Merge Family Queue Grid Updated](#)" for details).*

6. If desired, you can review pending records before they are merged. To do this, click  and select the **Merge Family Queue** option. Pending records are shown in the grid.

Merge Family Report Updated

The Merge Family Report was updated to provide more information about completed merges. We added these details to the report:

- First and last name of the staff member who initiated the merge. You can find the staff member's name at the bottom of the report.
- Member DUID of each merged member.
- Name suffix (for example, Jr.), if specified in the merged member's record.

Reports

Reports Section Added

We added a new section, labeled **Reports** to the **Administration** module. In this release, the **Reports** section features two new reports, available only for users with the Diocesan Admin permission enabled:

- [Access Rights Export](#)
- [Clergy Summary](#)

Access Rights Export

The Access Rights Export report enables diocesan administrators to export an Excel (.xlsx) file that lists the names of staff in selected organizations and shows their assignments and associated access rights. The report is designed to help administrators better manage access rights of staff in the organizations they oversee. For example, the information can be used to determine whether certain staff need permissions added or removed and whether organization administrators are following the policies of the diocese when granting access rights to their staff users.

The report setup is presented within a tabbed interface. Using the following steps, an administrator can quickly advance through the setup and create an Access Rights Export file:

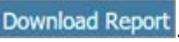
1. Click  to display the **Administration Reports** page (see previous illustration).
2. In the left panel, select **Staff > Access Rights Export**.

3. On the **Organizations** tab, select the organizations containing the staff you want to include in the report.

Note

Clicking  opens a top-level organization's group to display individual organizations within the group. You can select the checkbox next to each organization whose staff you want to include in the report.

Selecting a top-level organization selects all organizations within the group. To exclude specific organizations, deselect their checkboxes.

4. Click  or [Next](#) to advance to the **Positions** tab. Select the positions to which staff members must be assigned.
5. Click  or [Next](#) to advance to the **Options** tab.
6. If you want the export file to include access rights assigned on the **Diocese Directory & Web Solutions** tab in the staff record, select the **Include Diocese Directory & Web Solutions** checkbox.
7. Click .

The **AccessRights.xlsx** file is downloaded to your computer.

Clergy Summary Report

Designed for diocesan administrators, the Clergy Summary is a custom report that provides the following information for selected clergy:

- Name
- Date of birth/Date deceased
- Names of mother and father
- Date and place of baptism and name of celebrant
- Diaconate/Ordination date and place
- Date dismissed from clerical state
- Home and work addresses
- Assignment history, including place of assignment, primary position, and term dates.

Follow these steps to set up a report:

1. Click  to display the **Administration Reports** page (see previous illustration).
2. In the left panel, select **Clergy > Summary**.

3. To set up the report, complete the following:

Note

Based on what you need to know, use the report filter options to specify the clergy records to include in the report. With each filter selection, the Clergy grid updates to show the names of individuals matching your filter criteria.

- a) In the **Data Options** group, select the type of clergy (for example, priests) to include in the report. Then, select a **Status** option.
- b) If you want to include only the clergy whose assignments have no end date, select the **Active Staff Assignment Only** check box.
- c) In the **Report options** group, select how you want to organize the information in the report:
 - ❖ **Sorting**: specifies the order in which the individual records in the report are arranged:
 - **Last Name Ascending**: in alphabetic order from A to Z.
 - **Last Name Descending**: in reverse alphabetic order from Z to A.
 - **Member DUID Ascending**: in numeric order from the smallest to largest number.
 - **Member DUID Descending**: in numeric order from the largest to smallest number.
 - ❖ **Assignments**: specifies the order in which assignments are listed in the **Assignment History** section of the report:
 - **Newest**: in chronological order from the most recent to the least recent.
 - **Oldest**: in reverse chronological order from the least recent to the most recent.
- d) In the **Clergy** group, select the individuals you want to include in the report.

Note

*To select all individuals in the grid, select the checkbox in the header (to the left of the **Last Name** column), and then select the [Select all records](#) link.*

4. To generate the report, click [Click Here to View Report](#).

The report opens in the Report Viewer. Each page contains a single clergy record. Use the Page buttons in the toolbar to page through the records in the report.

Resolved Issues

Organizations

Organization Administrators Can Now Edit Any Organization to Which They Have Access

Previously, the system required an organization to be licensed before it permitted users with Diocesan Admin access rights to edit the organization's information. We removed this restriction. Users with Diocesan Admin rights can now edit any organization to which they have access.

Manage Staff

System Now Saves Edits to a Staff User's Member Details Record

Previously, the system did not save edits to a staff user's member record if the **Role** field in the record was not set to one of the following: **Head**, **Husband**, or **Wife**. We resolved this issue.

'Clear Filter' Button No Longer Disappears After the User Changes Organizations

We fixed an issue that caused the Clear Filter button  to disappear from the Staff List toolbar if the user applied the Advanced filter to the Staff List grid and then changed the organization view. The Clear Filter button is now retained after a user changes the organization view.

Merge Families

Old Failed Merge Records Removed from Merge Queue

In the initial 4.4.2 release, the **Merge Family Queue** grid was updated to show records that failed to merge (Status = **Failed**). An unintended result of this change was that the grid showed every failed record, including old records whose merges were eventually completed successfully. In a subsequent update, we removed these old records whose merge failures were successfully completed from the grid. We also set the default sort order on the **Date Merge Created** column to descending so that the most recently processed records appear first.

Timeout Error Experienced When Opening the **Merge Family Queue** Page Resolved

We resolved an issue that caused the user to experience a timeout error when attempting to open a **Merge Family Queue** page that contained a large set of data.

Subsequent Updates to the 4.4.2 Release

We strive to ensure a problem-free version update. Nevertheless, some issues occasionally arise after a major release. We fix such issues immediately in subsequent updates to the software. The following tables list the issues that were encountered in the v4.4.2 release that were quickly resolved in subsequent updates. Each entry in the tables provides a link to the release note item, presented earlier in this document.

Table 1. Issues Resolved in the v4.4.2.63 Update

Module	Issue Description	Update
Diocesan Development	DIO-1047 System Times Out When Generating Contribution Statements The system runs slowly and eventually times out when the user tries to generate contribution statements.	Changes were made to speed system performance when generating contribution statements. A timeout error no longer occurs.
	DIO-1045 Clear Button for the Datepicker Calendar Not Working The Clear button for the datepicker calendar does not remove selected dates from the Start and End Date fields on the Fund Management page.	The Clear button for the datepicker calendar was fixed and now works as expected to remove selected dates.
Administration	DIO-1031 Merged Lookup Values for Religion Occasionally Not Updated in Member Details Lookup values for Religion that are merged by the diocese are sometimes not being updated in the Religion dropdown list in Member Details.	After a Religion lookup value is merged, the Religion dropdown list in Member Details consistently reflects the change, and any record using merged values is updated accordingly.
	DIO-1036 Merge Family Queue Grid Contains Old, Failed Merge Records The Merge Family Queue grid is showing old, failed merges that have since been corrected and completed successfully.	Old, failed merge records that have been successfully merged no longer appear in the Merge Family Queue grid. By default, records are now sorted in descending order on the Date Merge Created column so that the most recently processed merged records appear first.

Table 2. Issues Resolved in the v4.4.2.64 Update

Module	Issue Description	Update
Family Suite		
Family Directory	<p>CNFS-5717 The order in which the elements in a recipient's name appear on member mailing labels is not desirable</p> <p>The recipient's name on mailing labels appears in the following format, which is awkward and therefore not desirable: recipient's title followed by the last name and then the first name.</p>	<p>The recipient's name on the member mailing label was modified and now appears in this standard format: recipient's title (for example, Mr.) followed by the first name and then the last name.</p>
Offering	<p>CNFS-5762 The system generates a timeout error when attempting to load the Quick Entry Posting page</p> <p>Users in large organizations or in organizations attempting to process large batches are experiencing a timeout error when attempting to open the Quick Entry Posting page.</p>	<p>Performance adjustments were made to enable the Quick Entry Posting page to load without generating a timeout error.</p>
	<p>CNFS-5776 System is not taking negative contributions into account when calculating contribution totals</p> <p>In the Contribution Statement report, negative contributions that do not have a positive contribution to offset them are not being subtracted from contribution totals when they should be.</p>	<p>Negative contributions without an offsetting transaction to cancel them out are now included in the calculation of contribution totals.</p>
	<p>CNFS-5793 The system is not saving the user's changes to the fund end date</p> <p>When the user saves an edit to the fund end date, the system appears to save the edit but does not.</p>	<p>After the user clicks Save to submit a change to the fund end date, the system saves the change as expected.</p>

Table 2. Issues Resolved in the v4.4.2.64 Update (continued)

Module	Issue Description	Update
Family Suite (continued)		
Diocesan Development	<p data-bbox="451 359 984 422">DIO-1048 Export to PDF process overrides the user-specified font for body of statement</p> <p data-bbox="451 443 967 575">When contribution statements are exported to PDF, the system is changing the user's font selection for the body of statement to Times New Roman.</p>	<p data-bbox="1013 359 1438 453">The system now uses the font selected by the user for the body of statement text.</p>
Administration	<p data-bbox="451 617 976 716">CNFS-5791 The system is very slow or times out when attempting to load the Merge Family Queue page</p> <p data-bbox="451 737 956 869">When the user tries to open a Merge Family Queue page that contains a lot of data, the page is so slow to load that the system eventually times out.</p>	<p data-bbox="1013 617 1430 749">Performance adjustments were made to make the Merge Family Queue page to load faster without generating a timeout error.</p>

Contacting ParishSOFT

If you have questions or require support while using the application, use any of the following methods to contact us:

	http://www.parishsoft.com/getsupport
	support@parishsoft.com
	(734) 205-1000 (main) (866) 930-4774 (support) (734) 205-1011 (fax)