System Administration

There are several utilities available to the Shepherd's Staff administrator. These utilities include backing up and restoring your data, settings, security, and working with multiple databases.

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Program Settings and the Church Tab

The Program Settings window is where you find information and options for the Shepherd's Staff database you are currently logged into.

You can access this window by clicking on "System" in the upper toolbar and choosing "Program Settings".

The Church tab is the default tab selected when you open program settings and contains the general church settings like Church Name and Address. This church information is used quite often throughout the program and also printed at the top of many reports. This is also where you can find your CTS Support ID if it has been entered when you register your database and the software edition you are running of Shepherd's Staff.

Fields with an asterisk next to them are required and must be filled in before closing this window.

Program Tab

The program tab is where you can view several pieces of information about your installed version of Shepherd's Staff, as well as the database you're currently connected to. This window for the most part cannot be edited, however, it can be used to provide you with helpful information for troubleshooting. Below is a brief explanation of what each of these fields is showing:

- Program version - This field lets you know the exact version number of Shepherd's Staff that is installed on your computer.

- Active database - This field provides the file path for the Shepherd's Staff database that you are currently connected to.

- Database ID - This provides you with the unique database ID of the Shepherd's Staff database you are currently connected to.

- This computer - The name of the computer you are currently using

- Location of program files - This field provides the file path that contains the program files for Shepherd's Staff. These are the files that make up the program of Shepherd's Staff.

- Location of INI file - This field provides the file path for where you can find the INI or configuration file for Shepherd's Staff. This file tells Shepherd's Staff where to look for your database file.

- Location of work database and temp files - This field provides the file path for where you can find the temporary files Shepherd's Staff creates while in use. Shepherd's Staff creates these files in order to prepare reports as well as performing other critical tasks.

- Alternate spreadsheet program - This is where you can specify a spreadsheet program, other than Microsoft Excel to use when exporting from a grid. To the right of this field, if you click on the folder button, you can open a file explorer window to select the program you will be using instead of Excel. Clicking the red X next to this field will clear this field out.

- Last backup - This field will show the last time a backup was made of the database you are currently connected to.

- Last optimization - This field will show the last time an optimization was run on the database you are currently connected to.

There are also a few additional options you can use on this screen with different functions:

- Check for Updates - This will check to see if there are any available updates for Shepherd's Staff. If there are, you will be asked to close Shepherd's Staff, and the Shepherd's Staff Updater will start downloading the appropriate update file. This requires an active Shepherd's Staff support contract to receive updates.

- Disable the database backup reminder - If this box is checked, Shepherd's Staff will not remind you to make a backup when closing the database if it has been more than 15 days since your previous backup.

Security Tab

The Security tab is where you can manage the users of Shepherd's Staff. Here, you can add new users, edit existing users, or delete users you no longer want to have access to the system.

The view shows every user of the current database, and their information, including User ID, Name, whether they are an active user, when they last logged in, and their level of authority in each module.

To add a new user, click the Add button in the lower left corner of the window.

In the User Information window that appears, you will need to fill in each field that has been labeled with an *.

- User ID - This is the user's "username". This is what they will type in when they log in to Shepherd's Staff. This needs to be at least 3 characters long. Since the username is not case-sensitive, it will automatically appear in all caps.

- First Name - This is the first name of the user. This is used so you can identify the user on the Security Tab.

- Last Name - This is the last name of the user. This is used so you can identify the user on the Security Tab.

- Active - This checkbox will determine if a user is considered an Active user. If this is unchecked, the user will still exist in your database, but they will be unable to log in under this User ID.

- Password - This is where you will assign a password to this user. The password also needs to be at least 3 characters long, and it cannot contain the characters <>[]+;%#;" or spaces. Click "Create Password" and you will be able to fill in the password you want this user to have. If there are other people present and you want to hide the characters as you're typing, click the "eye" icon to the right of the password field to hide the password while it is being entered.

- Password hint - This is an optional field where you can provide the user a hint if they've forgotten their password. If a user types in an incorrect password at the login screen for Shepherd's Staff, a "hint" button will appear above the password field, where, if they click that button, the text you enter here will appear.

After setting up the user's login credentials, you will need to set their access to each of the modules within Shepherd's Staff, as well as a few utilities. You can set access for each of the modules at one of three levels:

- No Access - This option will not allow the user to open the selected module. The module's icon will be grayed out on the Shepherd's Staff Central window for that user.

- User - This option will provide the user with limited access to the selected module. When you select this option, a "Details" button will appear to the right of the drop-down list. Here, there is a checklist of options for that module where you can specify exactly what that user has access to within the module.

- Supervisor - This option provides full access to the selected module, with no restrictions.

There are also a series of checkboxes for other utilities within Shepherd's Staff, specifically Webtools and Email.

- Webtools access

  - Can enter attendance batches - This checkbox controls if a user can create and edit attendance batches within the Webtools interface.

  - Can enter offering batches - This checkbox controls if a user can create and edit offering batches within the Webtools interface

  - Can see contributor names - This checkbox controls if a user can see contributor's names when entering offerings in the Webtools interface.

- E-mail access

  - Can send e-mail from within the program - This checkbox controls if a user has access to the email section of Shepherd's Staff to be able to send out messages and email contribution statements.

When you are finished adding credentials and permissions, click "Save" to save their record. You can also click "Note" to add a note to their account.

To make changes to an existing user ID, click on the ID you want to change, and then click "Edit". You can edit any of the fields in the User Information window, except for the User ID field. If you wish to change that user's password, click the "Change password" button, enter your own password for security, and fill in their new password. Click "Save" to save your changes.

To delete a user from the system, select the user and then click "Delete". We recommend making the user inactive instead of deleting them, in order to be able to see their activity in the Audit log.

Audit Log

The Audit Log is an internal-activity tracking system. The log tracks who logged in, when they logged in, what modules they went into, and exactly what they did. The Audit Log will track activities up to 450 days with unlimited entries per day.

The new User Activity log will track who is in which module at any time. It is updated every 10 minutes.

1. You can access the audit log by clicking on System in the Shepherd's Staff Central Window and choosing "Program Settings"

2. Click the "Audit Log" tab.

3. You can search through the audit log by using the search boxes at the top of the grid.

4. Click Export to export the audit log grid to Excel.

User ID	When	Location	Description
SYSADMIN	3/16/2021 8:41:22 AM	Utility	Logged in
SYSADMIN	3/15/2021 1:52:47 PM	Utility	Logged out
SYSADMIN	3/15/2021 1:52:45 PM	Membership	Closed the Membership module
SYSADMIN	3/15/2021 1:52:32 PM	Membership	Closed the Membership module
SYSADMIN	3/12/2021 3:49:40 PM	Membership	Opened the Membership module
SYSADMIN	3/12/2021 1:12:47 PM	Utility	Logged in
SYSADMIN	3/12/2021 1:10:20 PM	Utility	Logged out
SYSADMIN	3/12/2021 1:04:23 PM	Membership	Closed the Membership module
SYSADMIN	3/12/2021 9:42:12 AM	Membership	Opened the Membership module
SYSADMIN	3/12/2021 9:39:05 AM	Utility	Logged in
SYSADMIN	3/12/2021 9:38:53 AM	Utility	Logged out
SYSADMIN	3/12/2021 9:24:07 AM	Utility	Logged in
SYSADMIN	3/12/2021 8:39:57 AM	Utility	Logged out
SYSADMIN	3/12/2021 8:39:55 AM	Membership	Closed the Membership module

Shepherd's Staff Program Settings

Church   Program   Security   Audit Log   Tools

Search   and

Export   2506

Tools Tab

The Tools tab contains various utilities you can run that affect Shepherd's Staff in different ways. The tools tab also contains Contributions and Finance settings that affect those modules specifically. Below is a listing that walks through each of the items on this tab, and what these items do:

- Check for program updates - Running this tool will prompt the Shepherd's Staff updater utility to check to see if there are any available Shepherd's Staff updates. If there are, you will be prompted to close Shepherd's Staff in order to install the updates. This tool requires a current support contract and your database must be registered in order to receive updates.

- Register this database with WebTools - This tool will open the WebTools Manager window to register your Shepherd's Staff database so you can receive software updates and use the WebTools features of Shepherd's Staff.

- Compress Membership photos - This utility will compress all photos in your photos folder for Shepherd's Staff, which will reduce the file size on these photos. A backup is recommended before running this utility

- Reset the "Finance is checked out" warning - This utility will clear the warning that appears when you make a backup and you opt to "check out" finance. When finance is checked out users are warned that the changes they make in the finance module will be overwritten when a backup is restored.
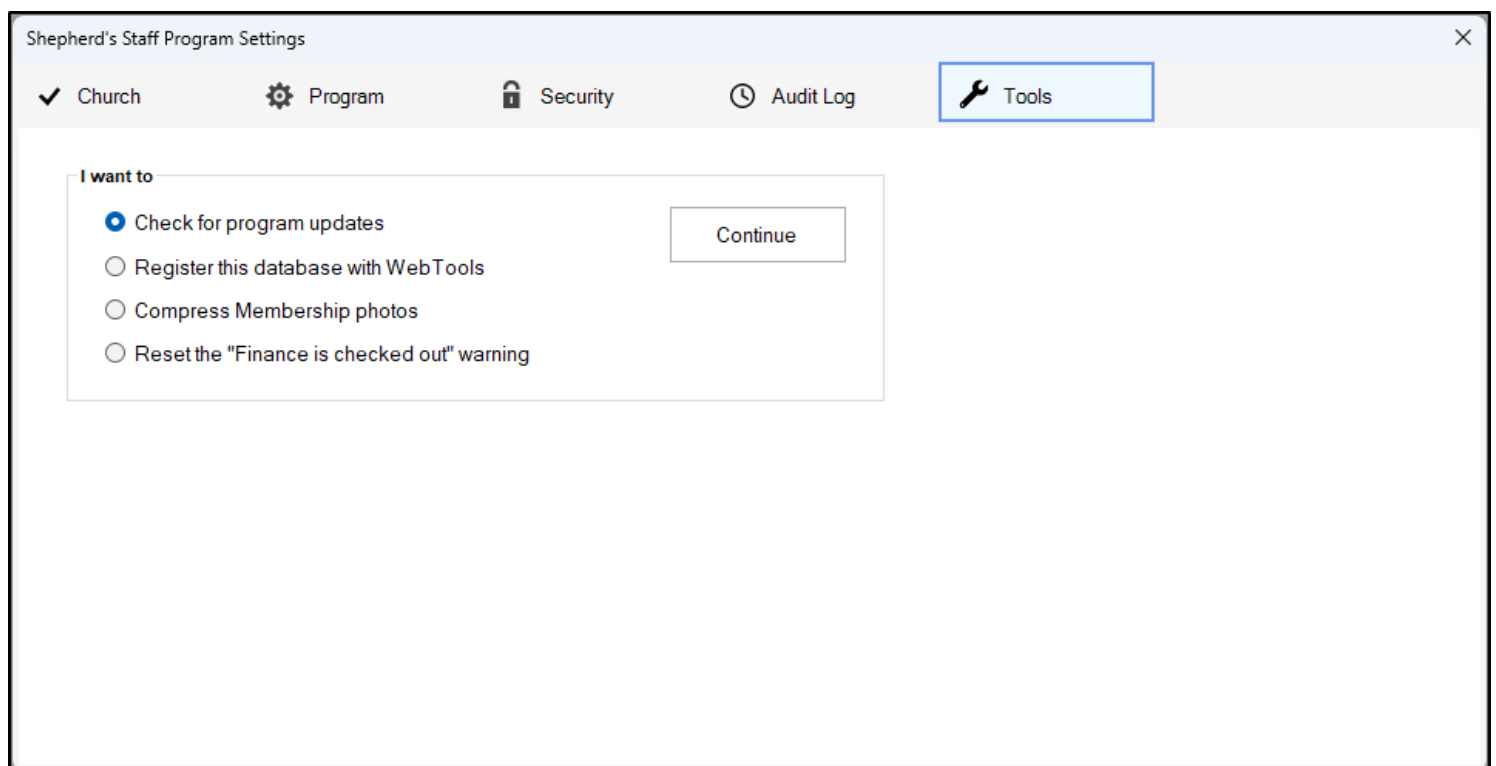
Change Password

Any user can change his or her password by using the Change your password utility. They can also set a hint for his or her password.

1. Access the Change your password utility by going to the Shepherd's Staff Central Window, click on System>Security>Change your password

2. In the Old Password box, type in your current password. This is required for changing your password.

3. In the New Password box, type in your desired new password. Be sure to not include any of the characters mentioned in the warning text above this box, and make sure the password is longer than 3 characters

4. In the Confirm Password box, type in the same password you typed into the "New Password" box.

5. In the Password Hint box, type in a hint for your password, if you would like. This can help if you've forgotten your password.

Note: Check the "Show Password" box to reveal what has been typed into the "New Password" and "Confirm Password" boxes. Be careful that other people are not viewing your screen as well when using this option to protect the privacy of your password.

Backing up Your Database

Overview

The "Backup Database" utility is one of the most important utilities in Shepherd's Staff. When you make a backup, you essentially make a copy of your database at that moment in time. The backup compresses the database into a file and saves the file in the place you choose.

It is highly recommended that you backup your database routinely. It is also suggested that you keep one of these backups on a removable drive (e.g., USB drive, CD, Cloud) that you can take off-site. In the case of a disaster or computer failure, a copy of your data would be safe. In addition, users who have a support contract can upload a database to CPH. We will house the backup for a short period, and you can request it at any time.

Churches can also archive backups on their drives. This is always a good idea because it gives you a history of backups to go through if you become aware of a problem that has existed prior to your most recent backup.

There are two backup utilities in Shepherd's Staff. The first is a database backup, which backs up the information regarding membership, attendance, contributions, and finances. This utility does not back up photos or attachments; these are backed up in the second utility, and this process is covered in the article "Backing Up Photos and Attachments."

Note: The space needed for the backup will be larger than the actual backup file. This is because several extra files are created and then deleted during the backup process.

Key Terms

» A location I choose—This option allows you to choose a location on your computer or network in which to save the backup file. During your first time backing up your database, this is the only option you will be able to choose.

» The last location used—This option will automatically save a new backup in the location your most recent backup was saved.

» A previous location—This dropdown will list all the locations you have ever saved a backup file to.

Note: The name of the backup file cannot be completely changed. The name is how the Restore utility knows if a particular backup is the correct one for your database. This is to prevent an override by an incorrect database if you are using multiple databases for multiple churches. However, you can add text to the beginning of the file name to help distinguish which backup is which.

Here is how to backup your database:

1. Close out of all modules in Shepherd's Staff, make sure you are on the Shepherd's Staff Central Window

2. Select "Tools" at the top of the window.

3. Choose Backup and Restore, and then choose "Database".

4. Make sure the "Backup Database" tab is selected at the top.

5. Choose the location in which to save the backup. During your first time backing up your database, you will only be able to select "A location I choose."

6. Optional: If you plan to make changes to the Finance module on an off-site computer and then apply those changes to this computer later, you may want to check the box next to "Flag Finance as being checked out". This will turn the Finance module red and will tell other users that any changes they make in Finance will be overwritten when the database is restored.

7. Click "Start backup".

8. Choose the location where you would like to save the backup and click "Save".

Upload Your Backup to CTS

Concordia Technology Solutions (CTS) recommends that you always keep an off-site backup located on a separate external hard drive, CD-ROM, or USB thumb drive. This allows the data to be recovered in case of a computer failure or on-site disaster.

In order to make this process easier, there is now an option to upload a database backup to secure servers at CTS. This process will also save a copy of the backup to your PC.

Before a backup is uploaded to CTS, it is first encrypted. The backup is then uploaded to a secure server, where it is scanned for viruses and checked for any corruption. From there, it is moved to another secure server at CTS for storage.

CTS will keep your backup based on a timing schedule. For the first 30 days, your last backup of each day will be kept. After that, CTS will keep your last backup of each month. Each of these monthly backup records will be kept for 90 days throughout the duration of your active support plan.

» Note: This process can only be completed if your database is registered and you have an active support plan. You can contact CTS during normal business hours to obtain a copy of your backup in the event of a disaster. We should be able to process your request within one business day.

Here is how to upload your database to CTS:

1. Close out of all modules in Shepherd's Staff, make sure you are on the Shepherd's Staff Central Window

2. Select "Tools" at the top of the window.

3. Choose Backup and Restore, and then choose "Database".

4. Click the checkbox at the bottom of the window that says "Upload backup to CTS".

5. Follow the steps you normally would to complete a backup.

Backup Routine

Backup Database | Restore Database

Start backup

Close

❓
Help

Backup to

⦿ A location I will choose after clicking "Start backup"

○ The last location used   `C:\Users\egbertbc\Documents`

○ A previous location   Select a Previous Location for this Backup ▼

Backing up to:

Backup requirements

Current database: C:\ShepherdsStaff\DemoDatabase.mdb

Space needed: 16,873,472 bytes needed

⇆

Space available: Unknown

What's this?   ☐ Flag Finance as being checked out

What's this?   ☐ Upload this backup to CTS

Restoring a Backup

"Restore" is a powerful tool that allows you to restore the data from a previous backup. This utility must be used carefully—if a backup from two years ago is restored, then all the data keyed in after that date will be lost! To help avoid issues like this, only those logged in as the System Administrator are able to restore a backup.

After a successful restore, Shepherd's Staff creates a database that contains all the data from before the restore. The database will be in a file named OLDCPHDB.MDB and can be found in the same folder as your original database. If you do a restore by accident, you can revert to the database inside the file OLDCPHDB.MDB, and all your data will still be intact.

There are several ways to select a restore. From the "Restore Database" tab, you can select any of the following:

» Most-recent one—This will restore the most recent database.

» Let me choose—This will open Windows Explorer, and you can select any restore file you would like.

» From a date—This will filter the backups to those that were created on a particular date. Use the calendar in the center of the window to select your desired date.

» Past 270 days—This will display all backups done in the past 270 days. You can then use the calendar to select dates in order to narrow your search.

1. Close out of all modules in Shepherd's Staff, make sure you are on the Shepherd's Staff Central Window

2. Select "Tools" at the top of the window.

3. Choose Backup and Restore, and then choose "Database".

4. Click on the "Restore Database" tab.

5. Choose an option under "Which backup do you want to restore?" and use the calendar to narrow your search.

6. Select a backup from the list in the "Backups created on this date" box.

7. Click "Start restore".

Backup Routine   [x]

Backup Database | **Restore Database** |

┌─ Which backup do you want to restore? ──┐
│   │
│ [Start restore]   ● Most-recent one   │C:\Users\egbertbc\Documents\31d47e355ebd47a28ac04bcdaef24c4920170712100745.CTS│
│   │
│   ○ Let me choose   **Select a date**   **Backups created on this date** │
│ [Close]   │
│   ○ From a date   ┌──────────────────────┐   ┌─────────────────────────────┐ │
│   │ ◄   July 2017   ►   │   │   │ │
│   [?]   ○ Past 270 days   │ Sun Mon Tue Wed Thu Fri Sat│   │   │ │
│   Help   │ 25 26 27 28 29 30 1 │   │   │ │
│   │ 2   3   4   5   6   7   8 │   │   │ │
│   │ 9 10 11 12 13 14 15 │   │   │ │
│   │ 16 17 18 19 20 21 22 │   └─────────────────────────────┘ │
│   │ 23 24 25 26 27 28 29 │   │
│   │ 30 31   1   2   3   4   5 │   │
│   │ ◌ Today: 7/12/2017 │   │
│ ┌─────────────┐   └──────────────────────┘   │
│ │ Restore only│   │
│ │ Finance   │   Restore this backup file: **C:\Users\egbertbc\Documents\31d47e355ebd47a28ac04bcdaef24c4920170712100745.CTS** │
│ └─────────────┘   │
│   ┌──┐   │
│   └──┘   │
└───┘

┌─ Details ───┐
│   Last Database Backup   │
│   │
│   Backup made by: SYSADMIN   │
│   │
│   Backup made on: 7/12/2017 10:07:47 AM   │
└───┘

Backing up Photos and Attachments

Photo backups are handled by a separate utility from database backups. This is because the photos are not actually stored in the Shepherd's Staff database. A photo backup will also back up any attachments you use. Backing up your images is just as important as backing up your regular database, and you should always keep a copy on a removable disk and take it off-site in case of a computer failure.

Just like the database backups, photo backups can be archived. Archiving gives you a history of backups to go through in case you become aware of a problem that has existed prior to your most recent backup.

Below are some terms that will come in handy when using the Photo Backup Utility.

» A location I choose—This option allows you to choose a location on your computer or network in which to save the backup file. During your first time backing up your database, this is the only option you will be able to choose.

» The last location used—This option will automatically save a new backup in the location your most recent backup was saved.

» A previous location—This dropdown will list all the locations you have ever saved a backup file to.

Note: The name of the backup file cannot be completely changed. The name is how the Restore utility knows if a particular backup is the correct one for your database. This is to prevent an override by an incorrect database if you are using multiple databases for multiple churches. However, you can add text to the beginning of the file name to help distinguish which backup is which.

Here is how to back up your photos and attachments:

1. Close out of all modules in Shepherd's Staff, make sure you are on the Shepherd's Staff Central Window

2. Select "Tools" at the top of the window.

3. Choose Backup and Restore, and then choose "Photos".

4. Choose the location in which to save the backup. During your first time backing up your database, you will only be able to select "A location I choose."

5. Click "Start backup."

Backup Photos | Restore Photos | Photo Maintenance

Start backup

Close

Backup photos and attachments to

◉ A location I choose

○ The last location used   [No Previous Backup]

○ A previous location   [Select a Previous Location for this Backup ▼]

Backing up to:

Backup requirements

Current database: C:\ShepherdsStaff\DemoDatabase.mdb

Space needed: 105,657,518 bytes needed

Space available: Unknown

Restore Finance Only

Shepherd's Staff has the ability to make a copy of only the Finance data. This allows the church's treasurer to take a backup of the main database and update the finance module at home. The treasurer can then make another backup and restore only the Finance data to the main database. This will not override information from the Membership, Attendance, Contributions, or Scheduler modules.

After you have backed up the main database, here is how to restore Finance only:

1. Close out of all modules in Shepherd's Staff, make sure you are on the Shepherd's Staff Central Window

2. Select "Tools" at the top of the window.

3. Choose Backup and Restore, and then choose "Database".

4. Click on the "Restore Database" tab.

5. Click the "Restore only Finance" button.

6. Select the database you want to restore.

Restoring Photos and Attachments

The "Restore Photo" utility is a powerful tool that allows you to restore photos from a previous backup, just like you can do with the database. This utility must be used carefully—if a backup from two years ago is restored, then all the photos from after that date will be lost! To help avoid issues like this, only those logged in as the System Administrator are able to restore a backup.

There are several ways to select a restore. From the "Restore Photos" tab, you can select any of the following:

» Most-recent one—This will restore the most recent database.

» Let me choose—This will open a file browser window, and you can select any restore file you would like.

» From a date—This will filter the backups to those that were created on a particular date. Use the calendar in the center of the window to select your desired date.

» Past 270 days—This will display all backups done in the past 270 days. You can then use the calendar to select dates in order to narrow your search.

There are also additional options for selecting which photos you would like to restore:

» All images that are in use—If a record has an image associated with it, then that image will be restored. All photos that were removed from the person or household record after the backup was run will not be restored.

» Only missing images—This will restore photos that are in the backed-up photo database but are currently missing from Shepherd's Staff.

» Missing images and ones that are different—This will restore photos that are in the backed-up photo database, but they are currently missing from Shepherd's Staff or have been changed since the backup.

» ALL images (whether in use or not)—This will restore ALL photos that are in the backed-up photo database, including those that have been deleted from Shepherd's Staff since the backup.

Here is how to restore a photo database:

1. Close out of all modules in Shepherd's Staff, make sure you are on the Shepherd's Staff Central Window

2. Select "Tools" at the top of the window.

3. Choose Backup and Restore, and then choose "Photos".

4. Click on the "Restore Photos" tab.

5. Choose an option under "Which backup do you want to restore?" and use the calendar to narrow your search.

6. Select a backup from the list in the "Backups created on this date" box.

7. Choose an option in the "I want to restore" section in the bottom right corner of the window.

8. Click "Start restore".
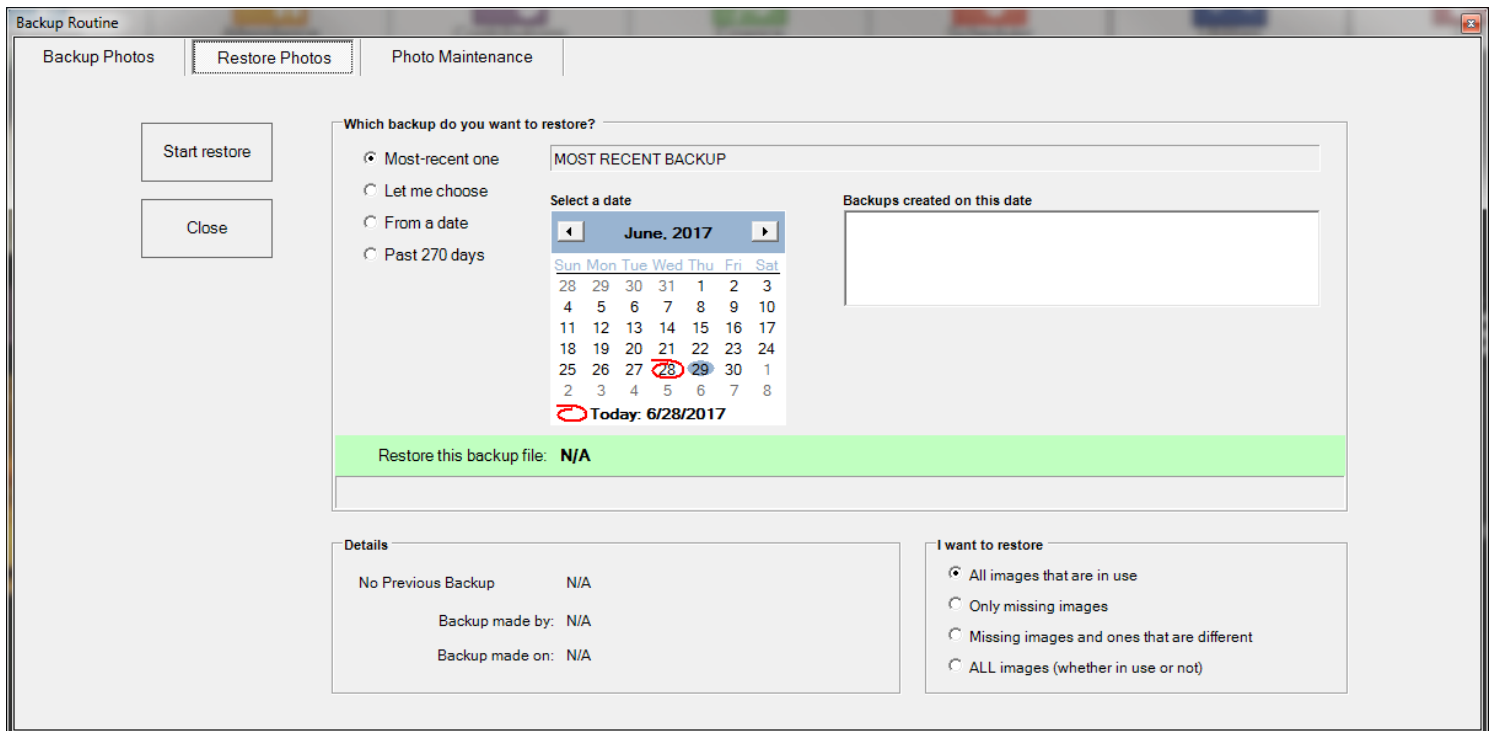
Photo Maintenance

Shepherd's Staff does not store the photos in your database. This helps make the database smaller and more portable since the database file will fit on a smaller flash drive. Shepherd's Staff makes a copy of each photo and stores it in a different location. Shepherd's Staff then keeps track of where the photo is and grabs that photo whenever it needs to. But if those photos are moved, changed, or renamed, then Shepherd's Staff will not know which photo to display. The Photo Maintenance Utility can help fix these discrepancies without requiring a full photo restoration.

The Photo Maintenance Utility can be used to fix a record that is displaying the wrong photo or is not displaying a photo when it should. This utility also can help when the original photo has been moved or deleted or is corrupt. Restoring all photos from a backup can fix these problems, but this will erase any new images or change updated images to match what was in the most recent backup. The Photo Maintenance Utility is an easier way to fix one or two images when you do not want to restore all photos.

Here is how to open the Photo Maintenance Menu:

1. Close out of all modules in Shepherd's Staff, make sure you are on the Shepherd's Staff Central Window

2. Select "Tools" at the top of the window.

3. Choose Backup and Restore, and then choose "Photos".

4. Click on the "Photo Maintenance" tab.

The "Photo Maintenance" view contains the following elements:

» I want to—Each option changes what the Photo Maintenance Utility does. "View images" allows you to just view the images that are supposed to be there. "Select image and restore" is used to restore one specific image. "Automatically fix broken pointers" will attempt to fix records that are missing images or showing wrong images.

» Show these images—Allows you to choose which set of photos you would like to work with.

» Photo backups—Allows you to select a specific backup to compare your current database to.

» Images in your current database—This chart is where you can determine which photos have issues. The first column shows which records are supposed to have images and if they have images. "Photo?" means Shepherd's Staff is supposed to be showing an image. "Exists?" means there is a photo attached to the

record. (There are four combinations of these that will be covered later in the article.) This chart also shows the record's name.

» Current image—When you select a row in the "Images in your current database" chart, the "Current image" box will display the image that is currently associated with that record.

» Image from the backup—This box displays the image in the backup database for the selected record.

» Image—This box displays the orphaned image that is selected in the "Orphaned images" section.

» Orphaned images—This section lists images that are in the Shepherd's Staff image folder but are not used for any records.

» Images only found in the selected backup—This lists the images that are found in the backed-up database, but are not currently in the Shepherd's Staff image folder.

The "Images in your current database" section has a column called "Photo?:Exists?". This column has four possible combinations:

1. Yes:Yes—The record is supposed to have an image and it does have an image.

2. No:No—The record is not supposed to have an image and it does not have an image.

3. No:Yes—The record does not have an image saved to it, but there is an image for it in the drive. This means that there is an orphaned image that applies to this record. The image folder has a photo with the person's name on it, but the photo is not saved as part of their record. This can be fixed by clicking "Automatically fix broken pointers" in the "I want to" section.

4. Yes:No—The record is supposed to have an image, but there is no image. This can be fixed by restoring a backup or a single image.

To restore an individual photo:

1. In the "I want to" section, select "View images". You can preview the images you would like to restore by clicking on them in the "Images only found in the selected backup" section. Clicking on the image will select the entry in the "Images in your current database" section. You may have to press the up arrow and then the down arrow to refresh the list.

2. In the "I want to" section, click "Select image and restore".

3. Click ok on the dialog box.

4. Either select the person record in the "Images in your current database" section or select the image in the "Images only found in the selected backup" section.

To confirm that the restoration worked, look for the "I want to" section and select "View images". Then select the record in the "Images in your current database" section.
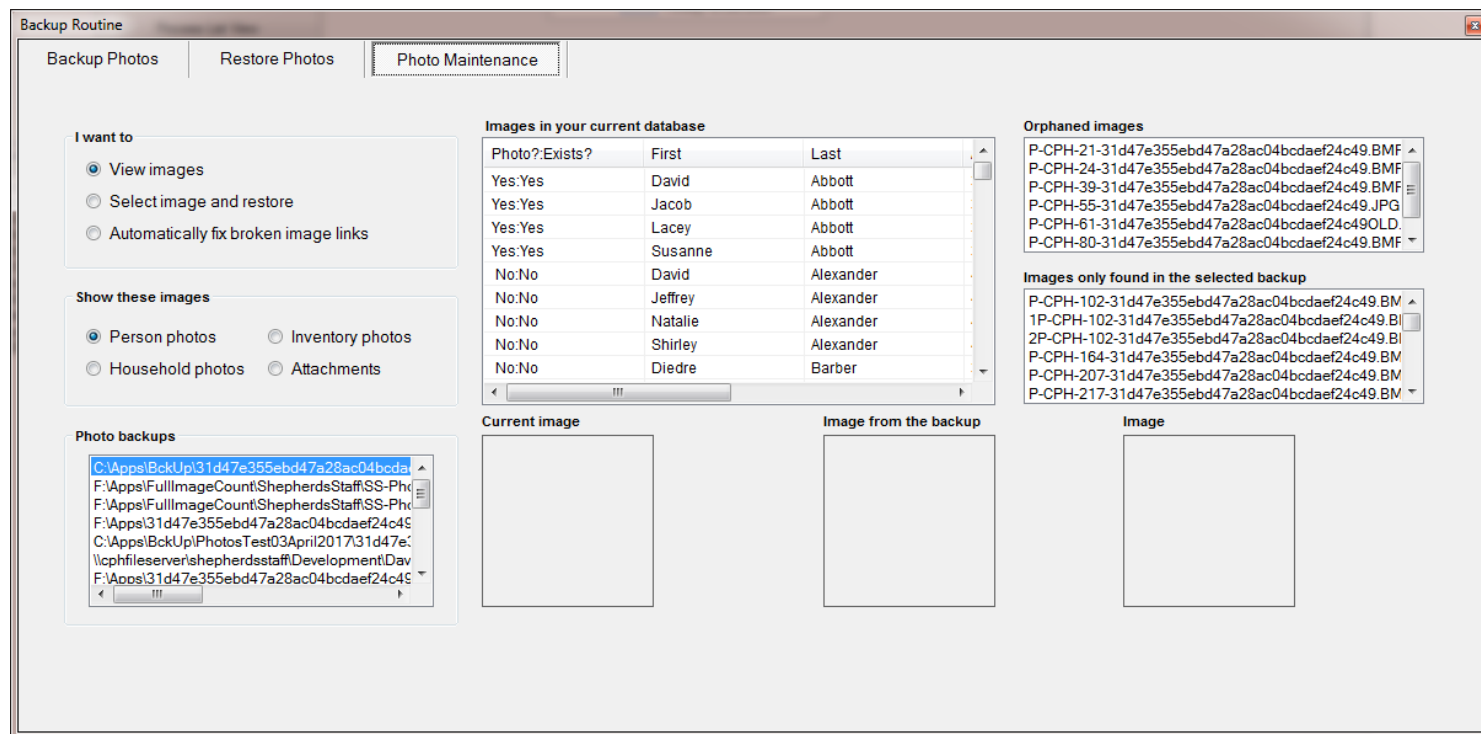
Registering Your Database

Registering your database is required if you plan to use WebTools or upload a backup to CTS for safekeeping. Doing this will also tell you if you have an active or expired support contract. It will also allow you to view free training videos for Shepherd's Staff as long as you have an active support contract.

Please note that an active support contract is also required to use WebTools and upload your backup to CTS.

Here is how to register your database:

1. On the Shepherd's Staff Central Window, click on "Tools"

2. Click on "Webtools Sync".

3. Select the "Register" tab.

4. In the "Enter your customer account number" field, enter your eight digit CPH account number

5. In the "Enter the order number" field, fill in your order number found on your latest Shepherd's Staff Invoice (If you aren't sure of this or your CPH account number, contact software support by emailing us at support@cts.cph.org or calling us at 1-800-346-6120)

6. Click the "Register" button.

WebTools manager

⏴🔄 Sync   🔧 Tools   Register   ❓   <u>Close</u>

<u>Register your database with WebTools*</u>

1. **Enter your customer account number**   [   ]

2. **Enter the order number**   [   ]

[Register]

* Please refer to your most-recent CTS software support invoice, or contact the CTS hotline.

Create a Church

The Create a Church utility allows you to create a new church database.

A new database will contain the same Program Settings as the church. It is recommended that you change the name of the church immediately after opening it to prevent any confusion.

By changing the names of multiple databases, you will always know which one is active.

» Warning: Shepherd's Staff databases cannot be combined. Each database that a church has must be managed independently including making separate backups.

1. From the Shepherd's Staff Login Window, click on Utilities.

2. Select "Create a church database".

3. In the window that appears, give the new database file a name. The default name will be your current database name with "-Copy" appended to the end.

4. Click "Create Database" to create your new Church Database.

5. Enter your new database information into the Church tab of the Program Settings window and click "Save' when finished.

Please give the new database file a name. You may
enter any combination of letters or numbers.
However, there can be only 41 characters in the file name.
Spaces and punctutation are not allowed.*

DemoDatabase-Copy

Create Database	Cancel

* The ".mdb" file extension is automatically added for you.

Select a Church

If you are using multiple databases, you can toggle between them by using the "Switch database" utility.

This utility can also help if you accidentally get connected to the wrong database and need to get back to the correct one.

The items of this utility include:

» Current database—This is the filename of the current database you are logged into.

» Current folder—This is the folder the current database is in.

» Databases in this folder—These are the other databases available in the current folder.

» Statistics—These statistics are based on the database selected under "Databases you may select." It is NOT showing statistics for the current database.

1. From the Shepherd's Staff Central Window, clicking Tools>Switch database.

2. When the "Select a Church" window opens, it will initially display statistics for the database you are currently using.

3. Click on a database under "Databases you may select" to display its statistics. This display is designed to prevent selecting the wrong database.

4. If you are not sure you have the right database, check dates like "Last Attendance," "Last Offering," and "Last Audit Log" to see if this database has been used recently.

5. Once the desired database has been selected, press "Select" to start using the database.

6. If the database you want is in a different folder, click the "Change Folder" button and browse for the other database.

Another method to quickly change to a new database is by clicking the "Switch" button on the sign-in screen when you first start Shepherd's Staff. This will begin the same selection process as above.

Switch to a different church database

Current database

DemoDatabase.MDB

Current folder

C:\ShepherdsStaff\

Databases in this folder

Statistics for the database DemoDatabase.MDB

Christ Community Church

|			
		Church zip/postal:	**63118**
Household records:	**93**	Last update:	**2/4/2021**
Person records:	**241**	Last update:	**2/26/2021**
Attendance records:	**56,944**	Last attendance:	**7/5/2020**
Offering records:	**19,448**	Last offering:	**3/7/2021**
Pledge records:	**628**		
Finance year:	**1/1/2021 – 12/31/2021**		
Transactions:	**4,492**	Last transaction:	**12/30/2020**
Ledger lines:	**12,970**	Last Audit log:	**3/12/2021**
Last backup:	**12/3/2020**	Last user:	**SYSADMIN**
Database version:	**8.8**	Last rebuild:	**3/4/2021**
Database ID:	**31d47e355ebd47a28ac04bcdaef24c49**		

Select	Change folder	Cancel

How to change the INI File when you can't access the database through the program
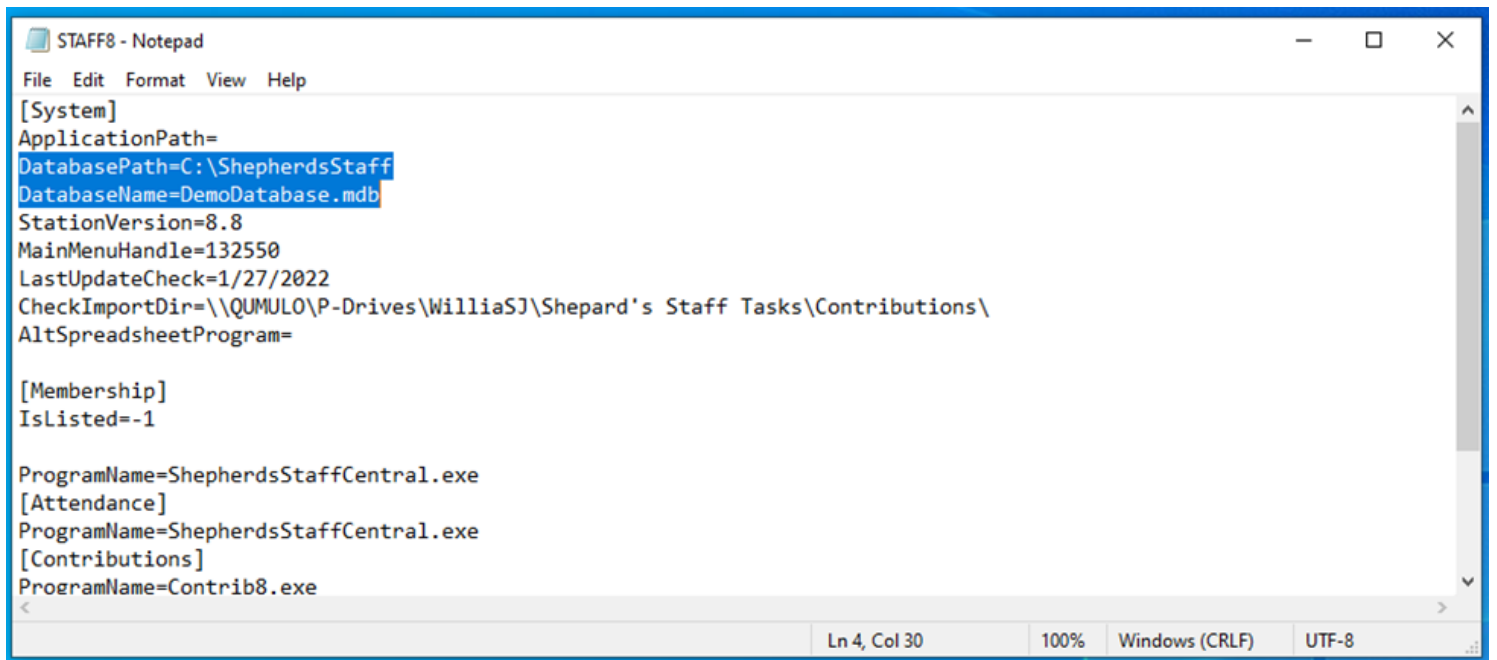
Sometimes you may encounter an issue where you can't open Shepherd's Staff to point the software to the correct database due to a few reasons. This can be caused by the computer has lost connection to the Shared Drive that houses the church database and has defaulted back to the default database or that the database was accidentally switched to a database from a prior version of the software.

In cases like that what you can do is go into your C: Drive on your computer. Once in the C: Drive you will want to go to Users, Public, Public Documents, and then CPH Shepherds Staff 8 folder. Then in the CPH Shepherds Staff 8 folder you should see a file in there called Staff8 this is the INI file which is how Shepherd's Staff knows which database to go to.

Finding your database can be difficult at times and if you are not comfortable with editing INI files, please feel free to reach out to support.
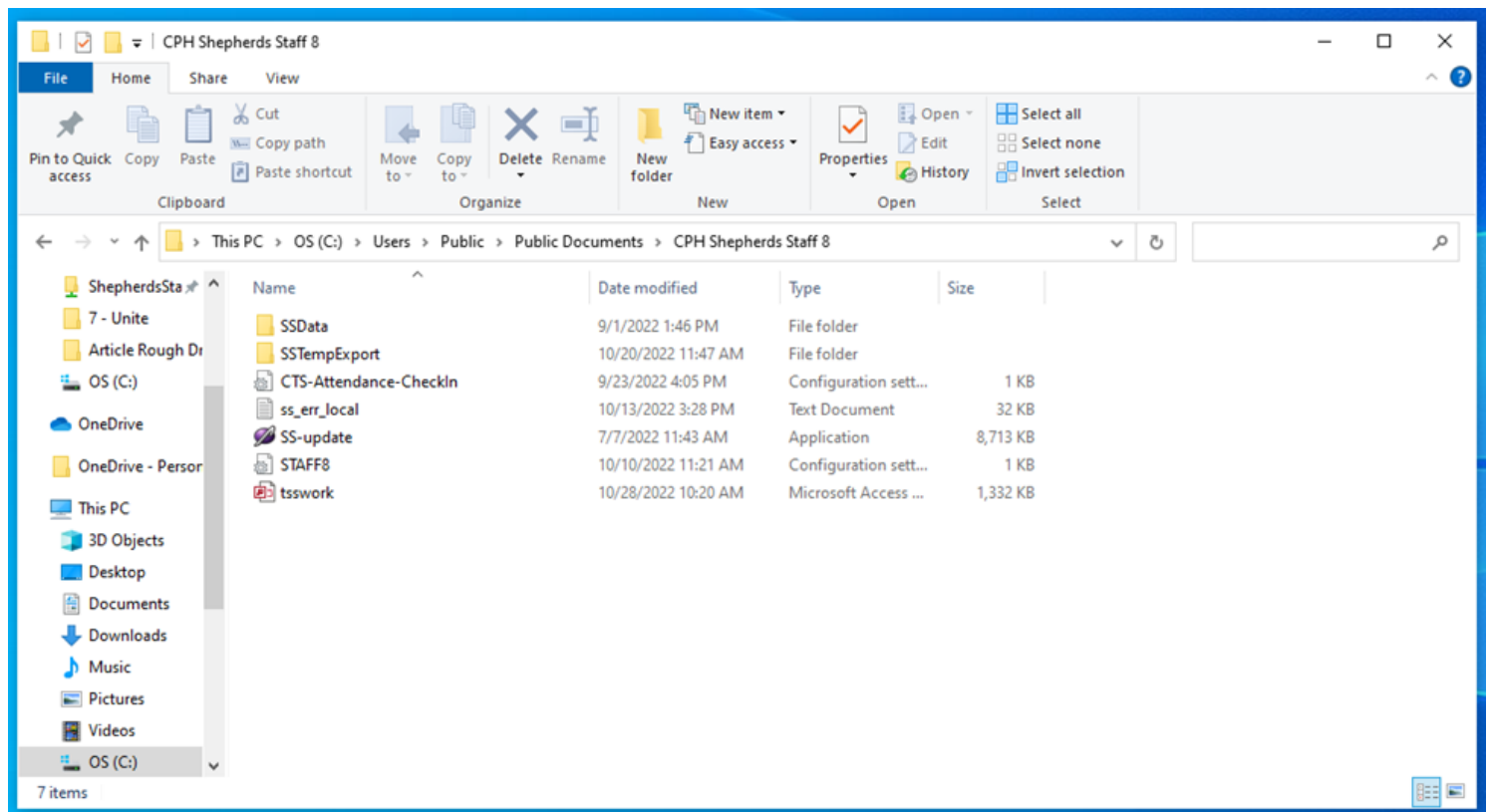
To get Shepherd's Staff to point to the correct database you will want to open the Staff8 INI File which will open a window that looks like this:

```
STAFF8 - Notepad                                                    —    □    ✕
File  Edit  Format  View  Help
[System]
ApplicationPath=
DatabasePath=C:\ShepherdsStaff
DatabaseName=DemoDatabase.mdb
StationVersion=8.8
MainMenuHandle=132550
LastUpdateCheck=1/27/2022
CheckImportDir=\\QUMULO\P-Drives\WilliaSJ\Shepard's Staff Tasks\Contributions\
AltSpreadsheetProgram=

[Membership]
IsListed=-1

ProgramName=ShepherdsStaffCentral.exe
[Attendance]
ProgramName=ShepherdsStaffCentral.exe
[Contributions]
ProgramName=Contrib8.exe
```
Ln 4, Col 30   100%   Windows (CRLF)   UTF-8

To change where the database is being pointed to you will usually need to change either the DatabasePath or the DatabaseName though depending on the situation you may need to change both.

For example, if you are using Shepherd's Staff on a single computer you would just need to change the DatabaseName to the name of your database and then click save. However, if your church has moved the database to a different folder than the default ShepherdsStaff folder you will need to change the DatabasePath as well from C:\ShepherdsStaff to the name of the new folder you had the database stored in.

If you are using Shepherd's Staff on a network, you will need to change the DatabasePath to the drive letter of the Shared Drive that houses the database for example "DatabasePath= Z:\" and you would then change the DatabaseName to the database in the Shared Drive then click save.

Reset SYSADMIN password

Starting in version 8.9 of Shepherd's Staff, we now offer a new method to reset the System Administrator password for your database. This process will begin with a call or email to CTS Support at 1-800-346-6120 or support@cts.cph.org. Be sure to include your name, your email address, the name of your pastor or head of the church council, and their email address. We'll then send both you and your pastor or head of church council an account recovery form via email. Once you both have filled out the forms, a member of our support team will reach out to you to use the new "Reset the SYSADMIN password" utility.

1. Call Concordia Technology Solutions software support at 1-800-346-6120 (available Monday-Friday, 7:30 AM-5:00 PM Central time.) You can also reach out to us by clicking the support button at the bottom right-hand corner of this article, or emailing us at support@cts.cph.org

2. When you contact us, please provide us with the name and full address of your church (including zip code), your name, your email address, the name of your pastor or head of the church council, and their email address.

3. After you have provided us with this information, we will email out an account recovery form. This will be sent to both you and your pastor or head of the church council. You will both need to fill this online form out.

4. Once both of you have completed the account recovery form, a member of our support team will reach out to you via a phone call. You will need to have access to your Shepherd's Staff software and database.

5. Open Shepherd's Staff, and at the login screen click Utilities>Advanced>Reset the SYSADMIN password.

6. Your support technician will provide you with a temporary authorization code which you can fill in on the window that appears. This authorization code is time-sensitive and is only good for the day it is processed, up until midnight that day. It also requires that your computer's clock is set to the correct date and that your support ID is filled in on the Church tab of the Program Settings menu to work properly. This authorization code is also case-sensitive.

7. Fill in the temporary authorization code in the "Enter temporary authorization code:" field exactly as it as provided to you by your support technician and click "Reset Password"

8. At this point, the System Administrator login (SYSADMIN) will have its password reset to the default password (password). You can log into Shepherd's Staff using these credentials.

9. After logging in, on the main menu of Shepherd's Staff, click on System>Security>Change your password.

10. In the "Old password" field, fill in the word password. In the New password and Confirm password field, fill in the new password you would like to use for the SYSADMIN login for Shepherd's Staff. If you would like to add a password hint for this password, you can type that hint in within the "Password hint" field.

11. Click "Change password" to confirm your change.

12. Log out of Shepherd's Staff and make sure you can log in to the SYSADMIN account with the new password you set.

Reset SYSADMIN password...   Close

              ⑦

1. Call Shepherd's Staff CTS Team at: 1-800-346-6120

2. The CTS team member will validate your credentials

3. The CTS team member will give you a temporary authorization code

4. Enter the temporary authorization code into the field below

5. Press the "Reset Password" button

6. The password for the SYSADMIN account will be change to 'PASSWORD'

7. Use "System\Security\Change your password" to change the SYSADMIN password

- -

Enter temporary authorization code: [＿＿＿＿＿＿＿＿＿]

[Reset Password]

Check for Updates

The "Check for Software Updates" tool checks the Shepherd's Staff server to determine whether you are using the most recent version of the software.

Note: You must be connected to the internet for this tool to work.

1. Open Shepherd's Staff

2. At the login window, click 'Utilities" in the top right corner of the window.

3. Click "Check for Software Updates"

4. If there is an available update, you will be asked to close Shepherd's Staff.

5. After closing Shepherd's Staff, you will see the Shepherd's Staff update window. Click continue to start the download of the latest version of Shepherd's Staff.

Note: The update will need to be performed on each machine that Shepherd's Staff is installed on. To allow updates to be automatically downloaded and installed, you must register your database online.
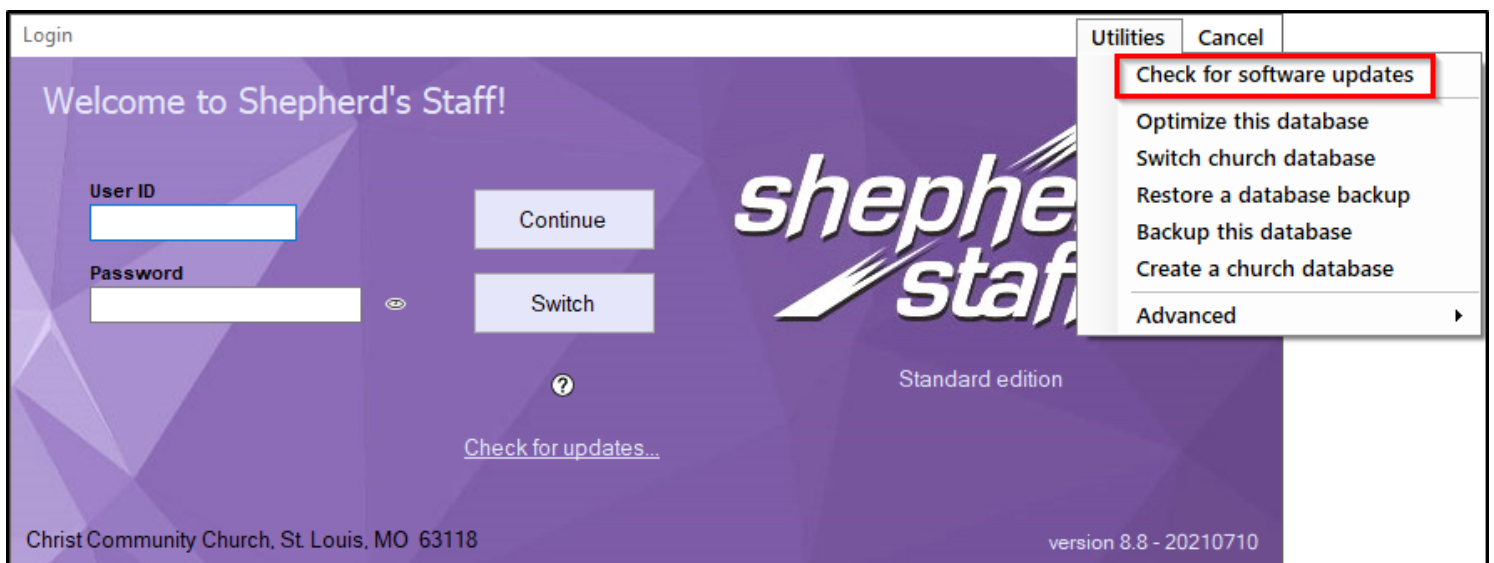
Optimize this database

The database optimization utility scans through the database to check the data, then compacts the database into its smallest size. This utility should be run periodically to lessen the chance of data corruption occurring.

Due to the importance of this tool, Shepherd's Staff will prompt you to optimize your database 90 days after you last ran the utility. At that time, a notification will appear when you close the program.

The first step of the optimize process is to create a backup. Then follow the steps below to run the utility itself. The program will notify you when the optimization is complete.

Note: This utility could take anywhere from 5 to 45 minutes to run, and no other users can be logged into Shepherd's Staff and connected to the same database you are running the optimization on.

1. Click on "Utilities" on the login screen.

2. Click "Optimize this database".

3. Click "Yes" to continue with the optimization.

4. At the window that appears, you will be asked to make sure no other users are logged in to Shepherd's Staff. Once you have confirmed this, click "Continue". This will start the optimization process.

5. The optimization process will complete automatically.
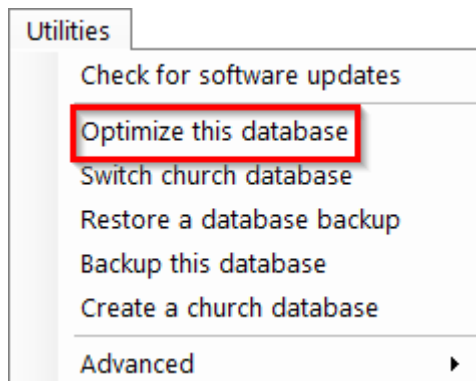
Reset Utility

The "Reset window sizes and settings" utility allows you to reset screen sizes, sort orders, and user preferences. This will allow you to return these items back to the system default if you have changed the settings and you find that your changes are not to your liking.

1. On the Shepherd's Staff Central Window, click on Utilities.

2. Click "Reset window sizes and settings."

3. You will see a "Finished" window appear. Click OK to close this window.
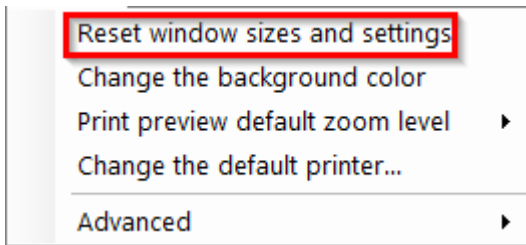
WebTools Sync

Keeping your database synced with WebTools is important if you use the Web Tools feature to enter batches for Contributions or attendance. An icon in the navigation bar allows you to quickly sync WebTools at any time.

When you sync WebTools, data from your database is sent to a server. The data includes church name, church address, person name, event names and info, enrollees, and contributions information.

> **Note**
>
> Before you can sync WebTools, you must register your database.

In the **WebTools manager** window, you can see the following information:

» **Sync button**—Clicking this button will sync all the information in your WebTools site with your Shepherd's Staff database. This sync needs to be done only when you have new members, households, envelope numbers, events, or contributions information.

» **Website icon**—Clicking this will open your WebTools site in your default browser.

» **Copy URL icon**—Clicking this will copy your WebTools URL. You can then paste the URL to share it with others.

» Other information—Below the WebTools URL is information like **support status**, **support end date**, and **database status**. It's normal for these fields to not display information. Before the sync is complete, Shepherd's Staff confirms this information and displays it then.

Here is how to sync WebTools:

1   Open the Membership module.

2   Click the **WebTools icon** in the top navigation. This icon will have a red symbol added if you need to sync your WebTools site.

3   Click **Sync.** A screen will show up and disappear once the sync is complete.

4   To import the batch, select **WebTools** from the command line at the bottom of the batch view.

5   Select the **batch you want to import**, and click **Import**.

WebTools   ☒

CTS Support ID
77770000

Web Link
https://webtools.shepherdsstaff.org/?key=afe483da825144ca

| ↻ Sync | ⊕ Website | ⛃ Copy Link |

Support status: ...
Support end date: ...
Database status: ...

...

Close