

Shepherd's Staff

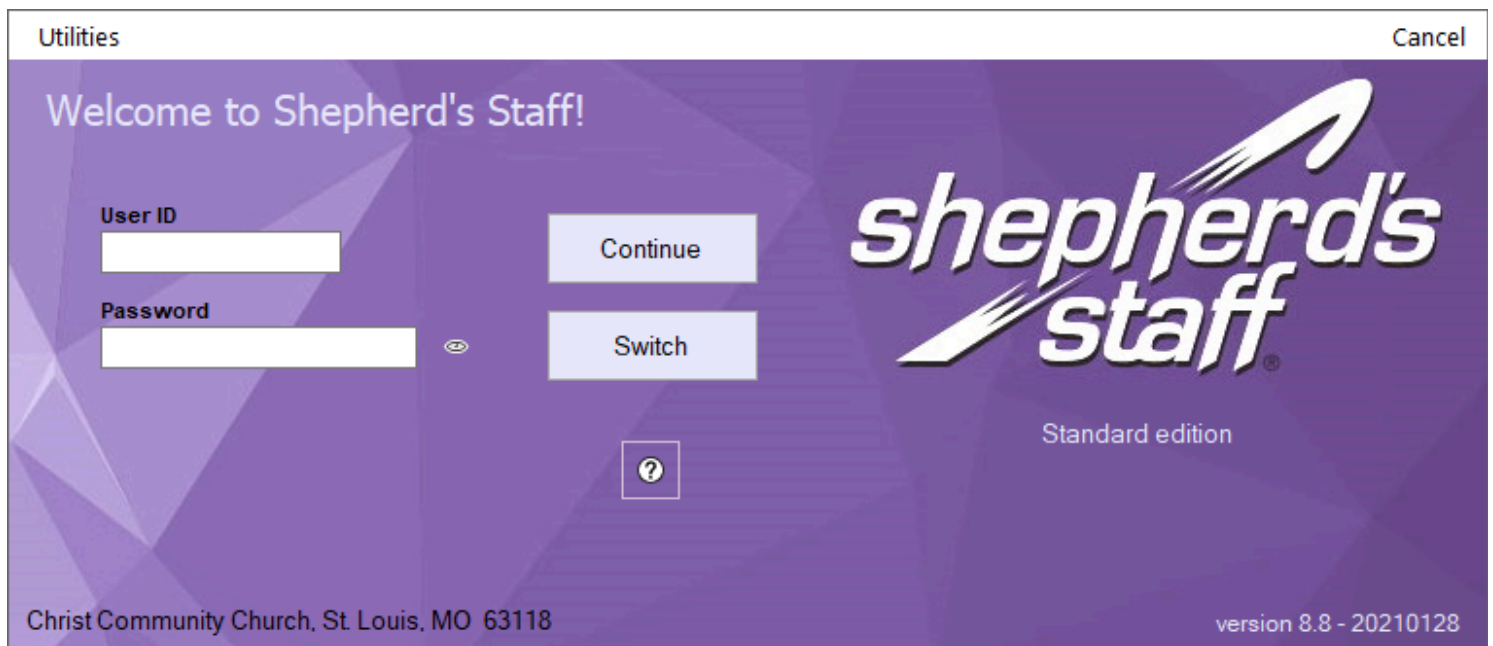
System Administrator

Manual

Login Screen

The Login Screen is the first thing you'll see when you open Shepherd's Staff. This is where you provide Shepherd's Staff with your login credentials: your User ID and Password.

- User ID - This is your username for Shepherd's Staff, assigned by your system administrator. This is not case sensitive, and will automatically appear in all caps.
- Password - This is the password you would enter specific to your UserID. This is also not case sensitive. Your password, by default, will be hidden as you enter it, but, if you press the eye icon to the right of the password field, your password will be revealed as you type it in. Be careful with this feature, and make sure that other people are not around when you press this icon, as this will make your password visible to them.



After typing in your User ID and password, press "Continue" to log in to Shepherd's Staff. If your username and password are correct, you will be taken into the Shepherd's Staff Central screen. If your User ID and password are not correct, you will receive a message letting you know your User ID isn't correct if your User ID doesn't match a User ID in the database, or, your password is not correct if your User ID is found, but your password is incorrect.

At the bottom left corner of the Login Screen, you'll see the church name assigned to this database, as well as the City, State and Zip Code of the church. If you click on this text, this will tell you where on your computer or network the database you are currently connected to is located, as well as when it was last backed up, and when it was last optimized.

If you find that this is the incorrect database, and you need to change which database you're connected to, you can click the "Switch" button. This will then bring you to the "[Switch to a different church database](#)" window, where you can select another database to connect to.

There are a variety of other utilities you can access from the Login screen by clicking the "Utilities" option at the top left corner of the window. These utilities include:

- [Check for Software Updates](#)
- [Switch Church Database](#)
- [Restore a Database Backup](#)
- [Backup this Database](#)
- [Create a Church Database](#)

Note: In order to use the Restore utility, you must first enter your System Administrator User ID and Password in the User ID and Password fields on the Login Screen. You can also restore only your [finance information](#) as well.

There are also Advanced utilities available. These include:

- Apply older database updates - This will reapply your database updates to your Shepherd's Staff database. We recommend that this utility be run only if instructed to do so by one of our technicians, and you should make a backup of your data before running this utility.
- View the central error log - This lets you view a text file that shows a log of all the errors that have occurred on your Shepherd's Staff database. A technician may need to look at this for troubleshooting purposes.
- View the INI file - This lets you access the INI, or configuration file for Shepherd's Staff. This is where you can manually adjust where your Shepherd's Staff software is looking for your database, which may be necessary in certain troubleshooting scenarios.

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.

The screenshot shows the 'Shepherd's Staff Program Settings' window with the 'Church' tab selected. The window has a toolbar with icons for Church, School, Program, Security, Audit Log, and Tools. The main area contains several form fields:

- * Church name:** Christ Community Church
- * Address:** 3558 S Jefferson Ave
- * City:** St. Louis
- * State:** MO
- * Postal code:** 63118
- Country:** USA
- Phone:** (empty)
- E-mail:** (empty)
- * Denomination:** LCMS
- ID within denomination:** (empty)
- Website:** (empty)
- Software edition:** Standard (with a 'Change' button next to it)
- CTS Support ID:** 77770000
- EIN / Federal tax ID:** (empty)

A 'Save' button is located in the top right corner. A help icon (?) is also visible on the right side of the form area.

School Tab

The School Tab is for use primarily with the Accounts Receivable system within the Finance module. Below is a brief explanation on what information should be filled out in each field.

- School name - The name of your school
- School address- The primary address for your school, not including City, State and Zip/Postal Code
- School city, state, postal code - The primary City, State and Zip/Postal Code of your school
- School phone - The primary phone number for your school
- School e-mail - The primary e-mail address for your school
- School website - The primary website address for your school
- School EIN / Federal Tax ID - This is the tax ID for your school for any invoices you may send out.

Shepherd's Staff Program Settings

Church School Program Security Audit Log Tools

If your church has a school or daycare and you use Accounts Receivable, enter that information here.

Save

School name	Christ Community School	School phone	555-555-5555
School address	1234 School Ave.	School e-mail	school@school.com
School city, state, postal code	St. Louis, MO 63558	School website	www.school.edu
		School EIN / Federal Tax ID	123456

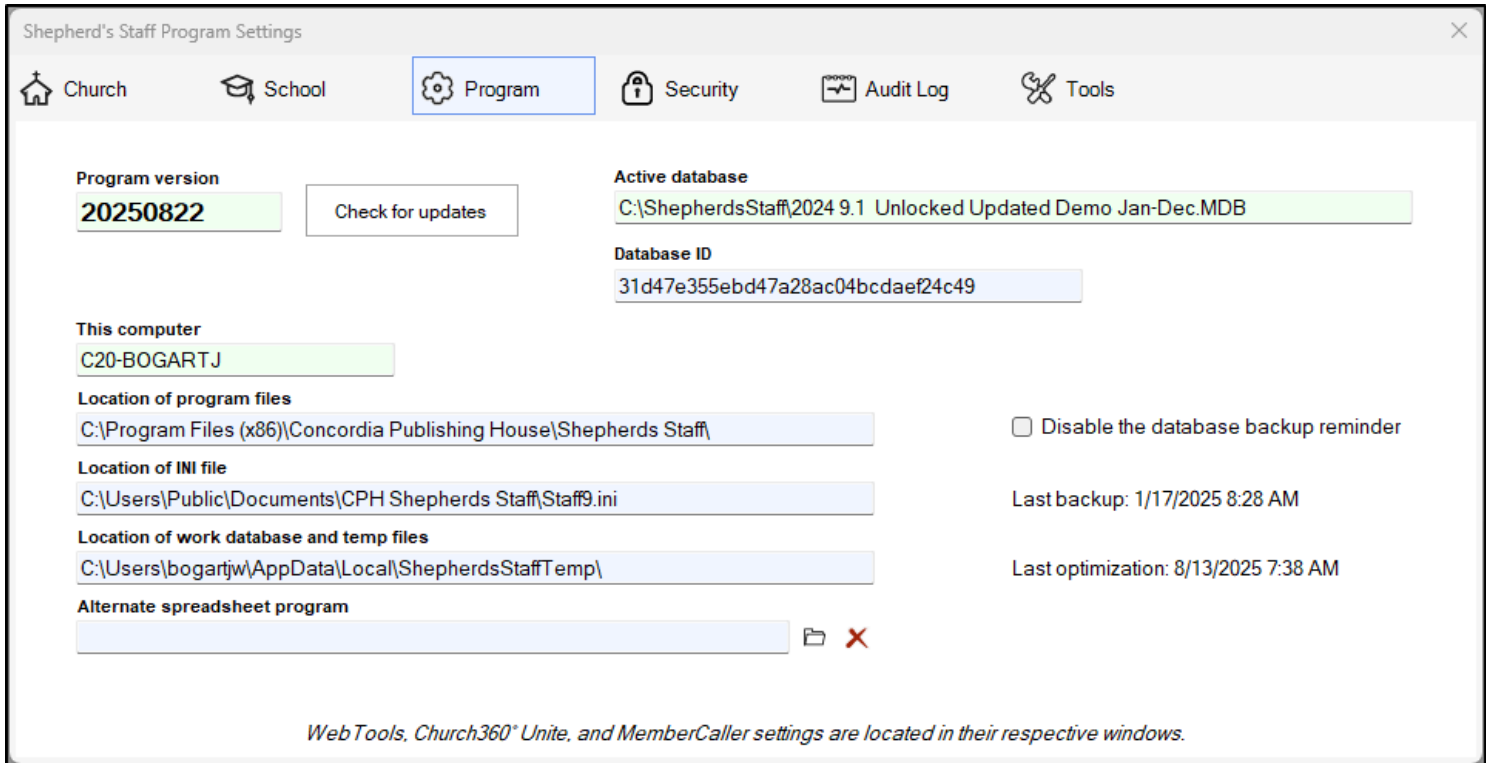
Program Tab

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.



Shepherd's Staff Program Settings

Church School **Program** Security Audit Log Tools

Program version
20250822 Check for updates

Active database
C:\ShepherdsStaff\2024 9.1 Unlocked Updated Demo Jan-Dec.MDB

Database ID
31d47e355ebd47a28ac04bcdaef24c49

This computer
C20-BOGARTJ

Location of program files
C:\Program Files (x86)\Concordia Publishing House\Shepherds Staff\ Disable the database backup reminder

Location of INI file
C:\Users\Public\Documents\CPH Shepherds Staff\Staff9.ini Last backup: 1/17/2025 8:28 AM

Location of work database and temp files
C:\Users\bogartjw\AppData\Local\ShepherdsStaffTemp\ Last optimization: 8/13/2025 7:38 AM

Alternate spreadsheet program 📁 ✖

Web Tools, Church360 Unite, and MemberCaller settings are located in their respective windows.*

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.

User ID	Name	Active?	Last login	Membership	Attendance	Contributions	Finance
ADMIN	Teresa Carter	<input checked="" type="checkbox"/>		User	User	User	Super
CALLOWAY	Rob Calloway	<input checked="" type="checkbox"/>		User	User	User	(none)
PASTOR	Kent Williams	<input checked="" type="checkbox"/>		Super	User	User	(none)
SECRETAR	Arlene Dowling	<input checked="" type="checkbox"/>		Super	Super	Super	(none)
SYSADMIN	System Administrator	<input checked="" type="checkbox"/>	8/22/2025 12:41:55 ...	Super	Super	Super	Super

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.

User Information

* User ID	* First name	* Last name	<input checked="" type="checkbox"/> Active?	Save
<input type="text"/>	<input type="text"/>	<input type="text"/>		Cancel
* Password	<input type="button" value="Create password"/>	Password hint		Note
<input type="password"/>		<input type="text"/>		

New passwords cannot contain <> [] + ' % # ; " or spaces

Permissions

Membership <input type="text"/>	WebTools access <input type="checkbox"/> Can enter attendance batches <input type="checkbox"/> Can enter offering batches <input type="checkbox"/> Can see contributor names
Attendance <input type="text"/>	
Contributions <input type="text"/>	E-mail access <input type="checkbox"/> Can send e-mail from within the program
Finance <input type="text"/>	
Scheduler <input type="text"/>	

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	8/25/2025 10:05:13 ...	Scheduler	Closed the Scheduler module
SYSADMIN	8/25/2025 9:44:37 AM	Scheduler	Opened the Scheduler module
SYSADMIN	8/25/2025 9:44:36 AM	Finance	Closed the Finance module
SYSADMIN	8/25/2025 8:39:53 AM	Finance	Opened the Finance module
SYSADMIN	8/25/2025 8:39:53 AM	System	Added 1 missing Budget record(s) for fiscal year 2026.
SYSADMIN	8/25/2025 8:39:53 AM	System	Added 17 missing Budget record(s) for fiscal year 2027.
SYSADMIN	8/25/2025 8:39:51 AM	Finance	Closed the Finance module
SYSADMIN	8/25/2025 8:39:50 AM	Finance	Finance Year Changed from 2024 to 2025
SYSADMIN	8/25/2025 8:39:28 AM	Finance	Opened the Finance module
SYSADMIN	8/25/2025 8:39:27 AM	Contributions	Closed the Contributions module
SYSADMIN	8/25/2025 8:17:19 AM	Contributions	Deleted UN-posted batch 126 entered on 9/7/2025 by SYSADMIN.
SYSADMIN	8/25/2025 8:17:17 AM	Contributions	Deleted UN-posted batch 123 entered on 9/7/2025 by SYSADMIN.
SYSADMIN	8/25/2025 8:17:15 AM	Contributions	Deleted UN-posted batch 128 entered on 9/2/2025 by SYSADMIN.
SYSADMIN	8/25/2025 8:17:13 AM	Contributions	Deleted UN-posted batch 125 entered on 9/2/2025 by SYSADMIN.


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.
- Reset database registration - This will clear your database registration in the event you need to re-register it under a new support ID. Only run this utility under the instruction of a technician with Concordia Technology Solutions
- 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.


 Church

 School

 Program

 Security

 Audit Log

 Tools

I want to

- Check for program updates
- Register this database with WebTools
- Reset database registration
- Compress Membership photos
- Reset the "Finance is checked out" warning

Continue

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.

Change Password [Close](#)

User Name

Old Password

New passwords cannot contain <> [] + ' % # ; \" or spaces

New Password

Confirm Password

Password Hint

Show 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.

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.

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. The location of the database you are backing up will be displayed in the "Database to backup" field.
5. The "Backup location" field will show where your database will be backed up to. If you want to change the location for this backup, click the folder icon to the right of the field to open the file explorer window
6. There are a few checkboxes for different options:

- Backup database - This box must be checked to successfully create a backup
- Checkout Finance - This is used when you want to take a copy of your backup to an off-site computer to work on the finance module of Shepherd's Staff. This will make it so, until you restore your backup, using the "Restore only finance" option, the finance module will show as being checked out when opening it, warning users that their work will be overwritten when the data is restored.
- Upload to CTS - This box, when checked, will send a copy of your database to Concordia Technology Solutions, and in the event you would lose your database and backups, you could restore your most recent backup you sent to CTS by reaching out to our support team. Note that you must have an active support contract for Shepherd's Staff to use this feature, it will be grayed out if you do not have a support contract.
- Backup photos and documents - This will create a backup of any photos and attachments you have added to any records within Shepherd's Staff.

7. Click "Backup".

Backup database... Cancel

Database to backup ?

C:\ShepherdsStaff2024 9.1 Unlocked Updated Demo Jan-Dec.MDB

Backup location

C:\ShepherdsStaffBackup_20250813144035.CTS 📁

Backup database ?

Checkout Finance ?

Upload to CTS ?

Backup photos and attachments ?

Backup

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

Backup database...

Cancel



Database to backup

C:\ShepherdsStaff2024 9.1 Unlocked Updated Demo Jan-Dec.MDB

Backup location

C:\ShepherdsStaffBackup_20250813144035.CTS



- Backup database ?
- Checkout Finance ?
- Upload to CTS ?
- Backup photos and attachments ?

Backup

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.

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. Make sure the "Backup photos and attachments" box is checked
5. Click "Backup"

Backup database...

Cancel



Database to backup

C:\ShepherdsStaff2024 9.1 Unlocked Updated Demo Jan-Dec.MDB

Backup location

C:\ShepherdsStaffBackup_20250813144035.CTS



- Backup database ?
- Checkout Finance ?
- Upload to CTS ?
- Backup photos and attachments ?

Backup

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.

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. The "Database to restore" field will show you the name of your current database that you will be overwriting with the backup that you restore.
5. The "Restore from Backup History table" field shows you a list of recent backups made on the database you have loaded. You can select the backup you want to restore from on this list, and the backup file itself, if it is able to be accessed by the computer you're using, will appear in the "Restore from backup file" field. If you would like to clear the list of recent backups (note, that this does not delete the backup files, just the list shown in this field), click the "Clean up history" button, and then you can select individual backups to remove from this list or backups from the last 1-5 years, or all backup files.
6. The "Restore from backup file" field shows you what backup file you have selected to restore. Clicking the folder icon to the right of this field will open a file explorer window where you can navigate to and select the backup file you want to restore.
7. There are a few checkboxes for different items:
 - Restore database - This box must remain checked for you to successfully restore a backup file. This will restore the entire database from your backup file
 - Restore finance only - When checked, instead of restoring the whole database like the option above, this restores only the finance module from the backup file you selected. You should uncheck the "Restore database box" when using this option.

- Restore photos and attachments - This box, when checked, will let you restore your backup of your photos and attachments. This must be done separately of a database restore, and will use a .PTS file instead of a .CTS file.

8. Click the "Restore" button.

The screenshot shows a dialog box titled "Restore database...". At the top right is a "Cancel" button. Below the title bar, there is a "Database to restore" section with a text field containing "C:\ShepherdsStaff2024 9.1 Unlocked Updated Demo Jan-Dec.MDB". Below that is a "Restore from Backup History table" section with a dropdown menu showing "Christ Community Church", "8/13/2025 2:48:52 PM", "C:\ShepherdsStaff\Backup_20250813144035.CTS", and "DATABASE". To the right of this dropdown is a "Clean up history" button. Below that is a "Restore from backup file" section with a text field containing "C:\ShepherdsStaff\Backup_20250813144035.CTS" and a folder icon button. At the bottom, there are three checkboxes: "Restore database" (checked), "Restore Finance only", and "Restore photos and attachments" (unchecked). The "Restore photos and attachments" checkbox is highlighted with a blue box. To the right of these checkboxes is a "Restore" button.

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:

Note: To minimize the risk of accidentally overwriting your entire Shepherd's Staff database, we recommend [making a backup](#) of your Shepherd's Staff database before restoring only the finance module.

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. Check the "Restore only Finance" box.
5. Select the database you want to restore by clicking the folder icon to the right of "Restore from backup file", or by selecting the backup from the "Restore from Backup History table" droplist
6. Click Restore

Restore database...

Cancel

Database to restore



C:\ShepherdsStaff\2024 9.1 Unlocked Updated Demo Jan-Dec.MDB

Restore from Backup History table



Christ Community Church 8/13/2025 2:48:52 PM C:\ShepherdsStaff\Backup_20250813144035.CTS DATABASE

Clean up history

Restore from backup file



C:\ShepherdsStaff\Backup_20250813144035.CTS



Restore database

Restore Finance only

Restore photos and attachments

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.

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. Select a backup from the list in the "Restore from Backup History table" or by clicking the folder icon to the right of "Restore from backup file" and selecting your backup file
5. Click “Restore”.

The screenshot shows a dialog box titled "Restore photos..." with a "Cancel" button in the top right corner. The dialog is divided into several sections:

- Database to restore:** A text field containing "C:\ShepherdsStaff\2024 9.1 Unlocked Updated Demo Jan-Dec.MDB".
- Restore from Backup History table:** A dropdown menu showing "Christ Community Church", "8/25/2025 10:24:07 AM", "C:\ShepherdsStaff\Backup_20250825102357.PTS", and "PHOTOS". A "Clean up history" button is to the right.
- Restore from backup file:** A text field containing "C:\ShepherdsStaff\Backup_20250825102357.PTS" and a folder icon button to its right.
- Options:** Three checkboxes with help icons: "Restore database" (unchecked), "Restore Finance only" (unchecked), and "Restore photos and attachments" (checked).
- Restore:** A "Restore" button at the bottom right.

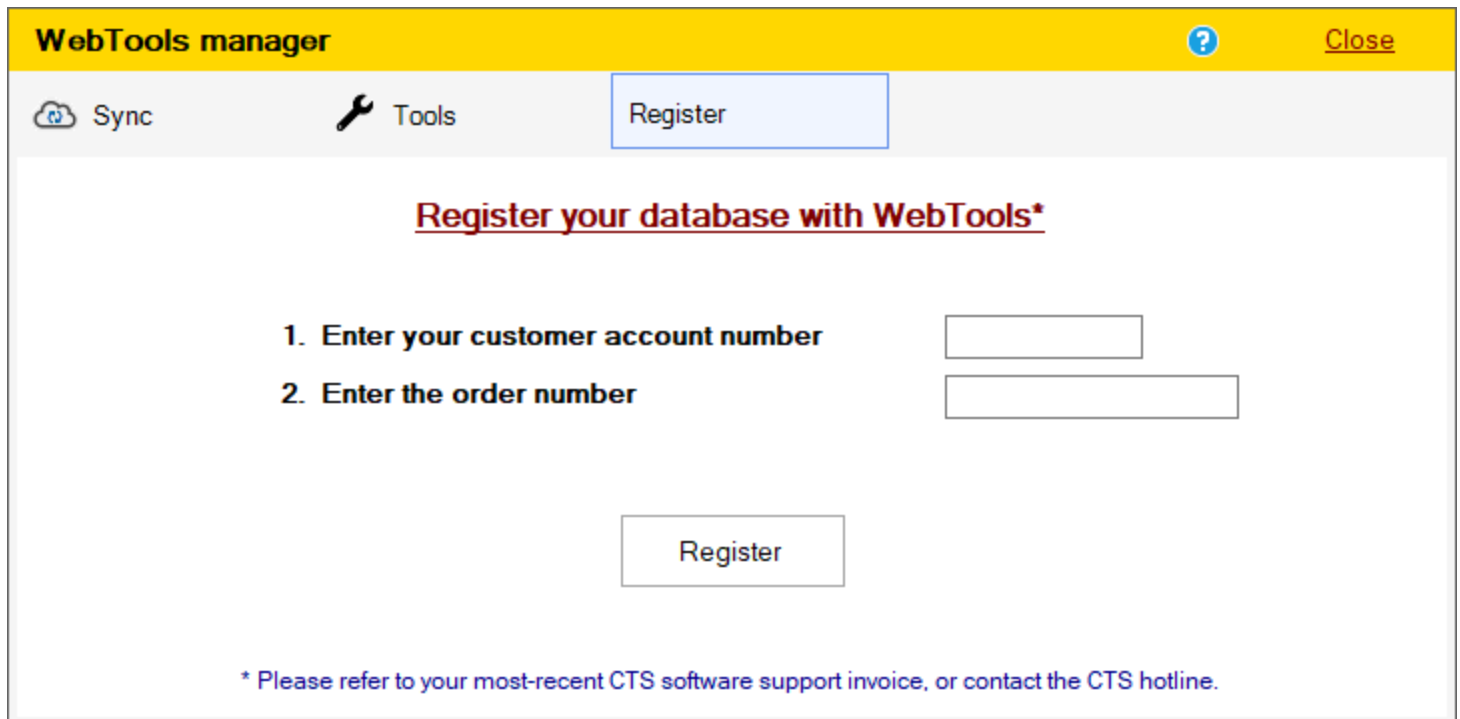
Registering Your Database

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.



The screenshot shows the 'WebTools manager' interface. At the top, there is a yellow header with the text 'WebTools manager', a question mark icon, and a 'Close' link. Below the header is a navigation bar with three tabs: 'Sync' (with a cloud icon), 'Tools' (with a wrench icon), and 'Register' (which is highlighted with a blue border). The main content area has a title 'Register your database with WebTools*' in red. Below the title are two numbered steps: '1. Enter your customer account number' and '2. Enter the order number'. Each step has a corresponding text input field to its right. At the bottom center of the form is a 'Register' button. A footer note at the bottom of the form reads: '* 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 punctuation are not allowed.*

* 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 folder the other database is in. Once you have found it, click on it on the file explorer window and click the "Select Folder" button.

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.

Current folder
C:\ShepherdsStaff

Current database

Databases in this folder



Christ Community Church

Support ID: 77770000 Database ID: [REDACTED]
Database version: 9.2 Church postal code: 63118

Household records: 92	Last household update: 8/7/2025	Last backup:
Person records: 240	Last person update: 8/7/2025	Last rebuild: 8/13/2025
Attendance records: 85,357	Last attendance update: 11/24/2024	Last audit log: 8/13/2025
Offering records: 30,860	Last offering update: 9/1/2025	Last user: SYSADMIN
Pledge records: 1,666		
Finance transactions: 6,455	Last transaction update: 9/1/2025	
Finance detail lines: 6,455	Finance year: 01/01/2024 - 12/31/2024	

Select Change folder Cancel

Selected database

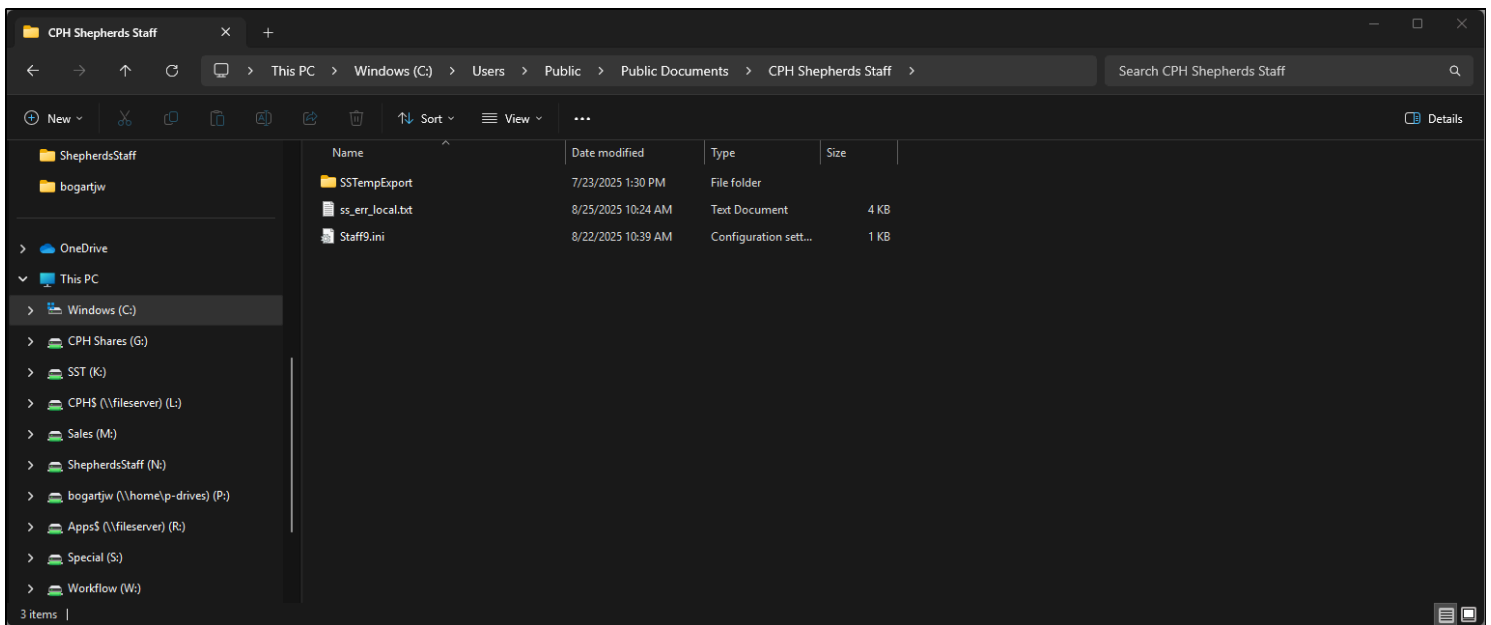
...

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 folder. Then in the CPH Shepherds Staff folder you should see a file in there called Staff9 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 Staff9 INI File which will open a window that looks like this:

```
[[System]
DatabasePath=C:\ShepherdsStaff
DatabaseName=2024 9.1 Unlocked Updated Demo Jan-Dec.MDB
StationVersion=9.1
LastCheckForUpdates=8/11/2025
[Kiosk]
DefaultAutoPrintBadges==Y
UseBarcodes=N
IncrementLabelSkip=N
AutoShowPrintLabel=N
```

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.

L0. 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.

L1. Click "Change password" to confirm your change.

L2. 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](#)

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:

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.

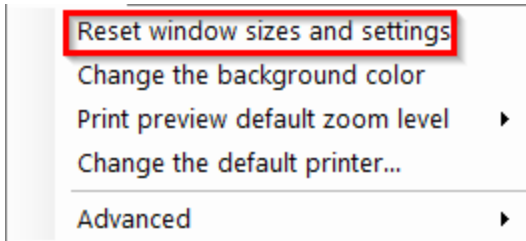
Note: The update will need to be performed on each machine that Shepherd’s Staff is installed on. To allow updates to be automatically downloaded and installed, you must **register** your database online.



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**.

The screenshot shows the 'WebTools manager' interface. At the top, there is a header with the title 'WebTools manager' and a 'Close' button. Below the header is a navigation bar with three tabs: 'Sync' (selected), 'Tools', and 'Register'. The main content area features a red heading: **Synchronize your database with WebTools**. Underneath, there is a section titled 'Your WebTools link' containing a text input field with the URL 'https://webtools.shepherdsstaff.org/?key=afe483da825144ca', a globe icon, and a copy icon. To the right of the input field is a 'Sync' button with a circular refresh icon. Below the link section, the support status is shown as 'Support status: Active' and the support end date is 'Support end date: 12/31/2030'.