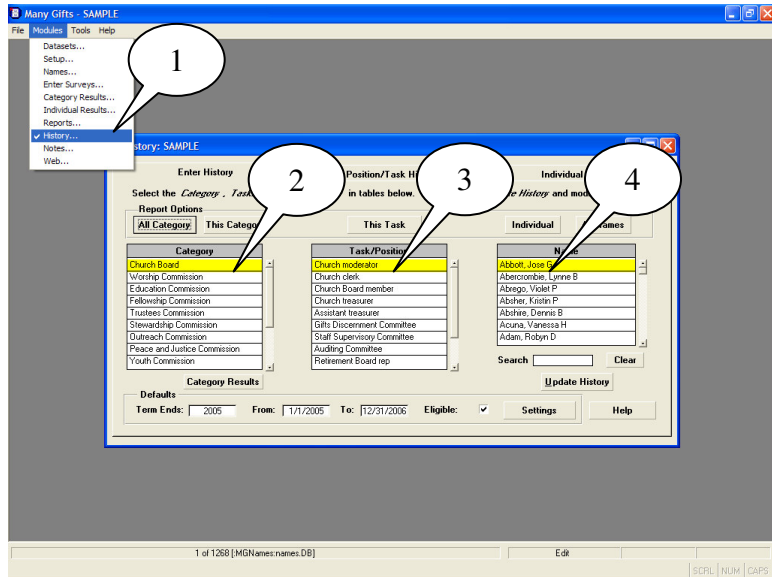


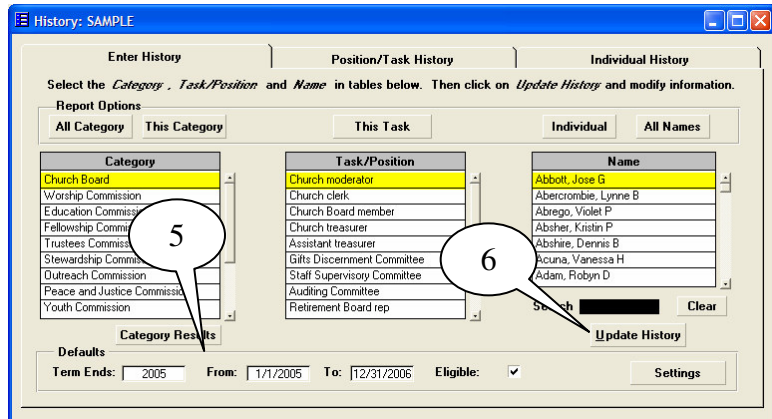
Using History

Maintain a history of involvement using names and positions. Then a report by position will show all the individuals who are currently serving or have served in the past. Or a report by individual shows the various tasks and positions filled by an individual over time.

1. Select **History** from the **Modules** menu.
2. To enter a record into the **History**, select and highlight a **Category**.
3. Select and highlight a **Task**.
4. Select a **Name**.



5. Are the defaults correct?
6. Click on **Update History**.



7. If the form looks like this, there are no other history records for this *name*, *category*, and *task*. Check or change information as needed.

Add History: SAMPLE

Proposed New History Record

Name: Abbott, Jose G. (7)

Category: Church Board

Task/Pos: Church moderator

Remember

Term Ends: 2005

From: 1/1/2005 To: 12/31/2006

Eligible

Position:

Comments:

There are no matching historical records. Make necessary changes on left and click on "Add to History" button.

8. Click on *Add to History*.

9. If the form looks like this, there is already a matching historical record for the *name*, *category* and *task*.

Add History: SAMPLE

Proposed New History Record

Name: Haskins, Susan Z. (10)

Category: Church Board

Task/Pos: Church Board member

Remember

Term Ends: 2005

From: 7/1/2005 To: 6/30/2006

Eligible

Position:

Comments:

(11)

There is one matching historical record which can be updated by clicking on the Adjust History button and making additional changes on the right side and clicking the "OK" button

10. Click on *Adjust History* to update the previously existing record. Make any necessary changes on the right side.

11. Click on *OK*.

12. A variety of report options are available by *category/task* or *name*. Click on the appropriate option.

History: SAMPLE

Enter History

Select the *Category*, *Task/Position* and *Name* tables below. Then click on *Update History* and modify information.

Report Options

Category	Task/Position	Name
Church Board	Church moderator	Hartle, Marilyn C
Worship Commission	Church clerk	Hartnell, Vera V
Education Commission	Church Board member	Hartsfield, Edward F
Fellowship Commission	Church treasurer	Harvell, Kevin K
Trustees Commission	Assistant treasurer	Harville, Donald C
Stewardship Commission	Gifts Discernment Committee	Haskins, Mark M
Outreach Commission	Staff Supervisory Committee	Haskins, Susan Z.
Peace and Justice Commission	Auditing Committee	
Youth Commission	Retirement Board rep	

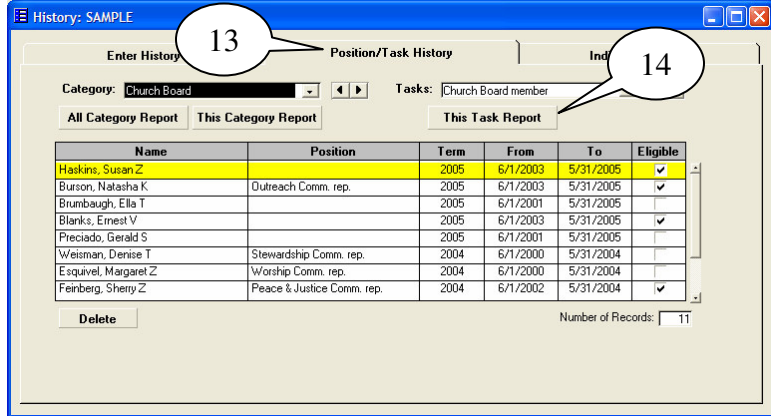
Search:

Category Results

Defaults

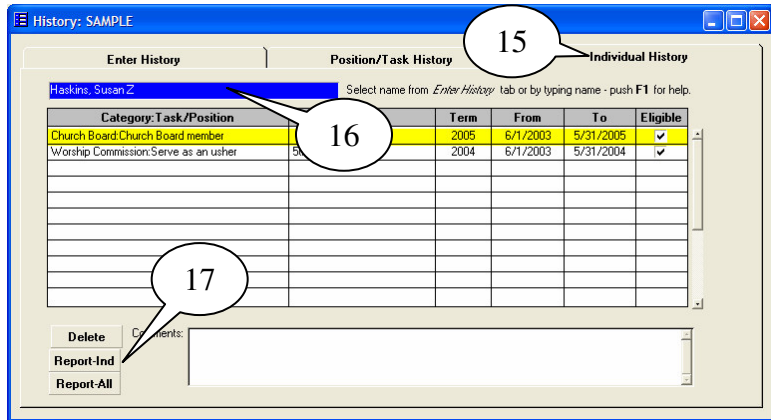
Term Ends: 2005 From: 7/1/2005 To: 6/30/2006 Eligible:

13. To view **History** records by **Position/Task**, use the **Position/Task History** tab.



14. Select the **Category**, **Tasks**, and use the appropriate report option.

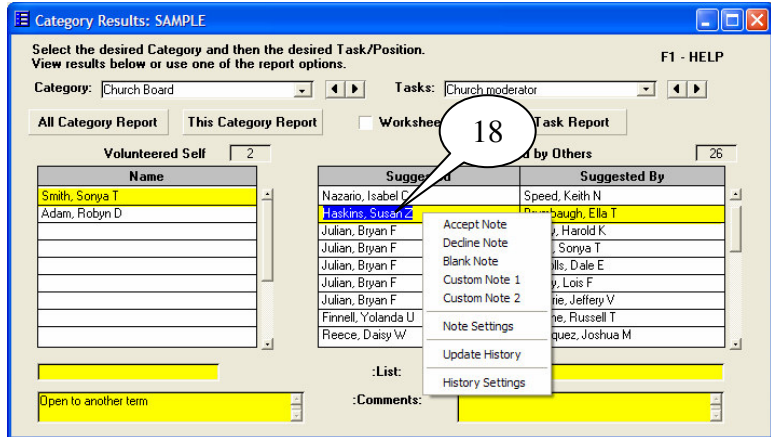
15. Use the **Individual History** tab to see history records for an individual.



16. Select the **Name**. See instructions.

17. Various report options are available.

18. History records can also be added from the **Category Results** form by right-clicking on a name.



19. You can also *Update History* by right-clicking on a name on the *Position/Task History* tab.

Double-click on a name to view the history for that individual.

The screenshot shows a window titled "History: SAMPLE" with three tabs: "Enter History", "Position/Task History", and "Individual History". The "Position/Task History" tab is active. It features a "Category" dropdown set to "Church Board" and a "Tasks" dropdown set to "Church Board member". Below these are buttons for "All Category Report", "This Category Report", and "This Task Report". A table lists individuals with columns for Name, Position, Term, From, To, and Eligible. A right-click context menu is open over the first row, "Haskins, Susan Z", with options "Update History" and "History Settings". A callout bubble with the number "19" points to the "Update History" option. At the bottom, there is a "Delete" button and a "Number of Records:" field showing "11".

Name	Position	Term	From	To	Eligible
Haskins, Susan Z		2005	6/1/2003	5/31/2005	✓
Burson, Natasha K	Church Comm. rep.	2005	6/1/2003	5/31/2005	✓
Brumbaugh, Ella T		2005	6/1/2001	5/31/2005	
Blanks, Ernest V		2005	6/1/2003	5/31/2005	✓
Preciado, Gerald S		2005	6/1/2001	5/31/2005	
Weisman, Denise T	Stewardship Comm. rep.	2004	6/1/2000	5/31/2004	
Esquivel, Margaret Z	Worship Comm. rep.	2004	6/1/2000	5/31/2004	
Feinberg, Sherry Z	Peace & Justice Comm. rep.	2004	6/1/2002	5/31/2004	✓