Parish Data V1.76
Users' Manual

Table of Contents

Part IV Appendices   **27**

Index   **29**

Part I

1 Introduction

1.1 Welcome

Thank you for your interest in the Parish Data Database Application, Version 1.76. Please send comments, suggestions, and/or bug reports to pfletch@parish-data.com. Please note that this version of this manual, which is made available for downloading from our site and may be freely copied and distributed, does not include detailed installation instructions for the application, but is otherwise complete as of its copyright date.

Please note that for security and other reasons you should *always* either log out or close and exit from the program when you finish a session and/or go away from the computer.

Part

II
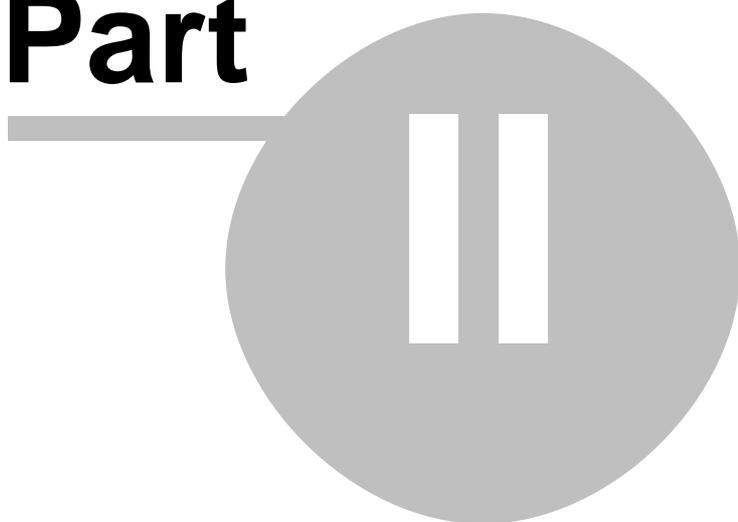
2 General Program Information

2.1 Background

Parish Data V1.76 is an Access Database Application which is designed to organise parish census data and to allow the pastor and parish ministers to make full use of available information in managing the parish and its people. It is not primarily focused on the financial aspects of running the parish, and is mainly intended to help with pastoral tasks. If there is a demand for more detailed financial record-keeping in association with the application, it may be developed as a semi-independent add-on, using the biographical data from Parish Data but keeping the financial data in a separate file.

The database is in Access 2000 format and the appropriate version of the application will run under Access 2000 or Access XP, but it will not run under any version of Access prior to Access 2000. Although there are few visible differences and no functional differences between the Access XP and Access 2000 versions of the application, neither will run under the other version of Access. There are no arbitrary limitations on the number of households, people, ministers, etc. supported by the program, except for those imposed by Access itself. These limitations on database size are many times higher than is likely to be relevant in the context of a parish database.

The program treats the Household as the basic geographical unit of the parish. Each Household contains one or more people (the number is essentially unlimited) as members, but every individual *must* belong to one and only one Household. One person, usually the member of the Household whose name is entered first, is recorded as the "Head of Household" and correspondence to the Household is, by default, sent to him or her. Correspondence can also be sent selectively to individuals (of a certain age, married, unmarried, etc.). Individuals living on their own are simply recorded as being in (and the Heads of) single-person Households. Decisions sometimes have to be made about how to treat unrelated people living at the same address. In many cases (lodgers, paying guests) it is obvious that there are really two (or more) Households at the same address, and the design of the program allows this. In other cases, the decision as to how to treat the situation may be a more difficult one. If in doubt, it is never wrong to create additional Households - at worst, it will cause duplication of communications.

By default, the relationships (if any) between all the individuals in each Household are recorded when the parish census data is entered. The program is, however, set up to allow the relationship between *any* two individuals in the database to be recorded and used in preparing queries or reports.

2.2 Installation Notes

Full installation instructions are provided with the evaluation version of the program. Initial on-site installation is generally included in the price for the Registered version, and full instructions are provided with upgrades. These instructions include multiple screen shots and would very substantially increase the file size if they were included in this version of the Users' manual, which is intended as an easily and quickly downloadable introduction to the Parish Data application.

2.3 Ministers, Visitors, & Users

Parish Data recognises a number of groups of people having different roles, both within the parish and in relationship to the database software.

Ministers are generally parishioners with formal (but not necessarily paid or full-time) roles within the parish. They obviously include the Pastor and any Deacons or Assistant Pastors, but may also include Readers, Eucharistic Ministers, the organist, members of the choir, or other individuals with significant functions. A single individual may have a number of separate ministries (there is no imposed limit on this number). Ministry information for an individual parishioner is entered on the "Add & Change Church Ministries" form.

Visitors (for the purposes of the database) are Ministers whose ministry requires them to visit other parishioners on behalf of the parish. The Pastor, Deacon (if any) and any other clergy will almost always be Visitors. Eucharistic Ministers will often be Visitors. Other individuals may be, according to their parish roles. An individual is identified as a Visitor in association with a specific ministry on the "Add & Change Church Ministries" form. Specifying certain ministries will cause the Visitor box on the form to be checked by default, but this can always be changed. The list of possible Ministries is currently hard-coded into the program, but additional ones can be added on request and user-entry may be implemented in the future if there is sufficient demand.

Because being a Visitor is treated as an aspect of parish ministry, Visitors *must* be recorded as being Ministers, and Ministers *must* be entered as regular members of the parish *before* being assigned their ministries. If you get to the "Add & Change Church Ministries" form and then realise (or discover) that the individual whose ministry you are trying to enter is not in the database, you can access the "Add Household Data" form directly from that screen to add him/her.

Database Users do not need to be parishioners, nor do any details other than those appearing on the "Add or Change Users" form need to be entered for them. However, Visitors who are regular users of the computer and use it to schedule their visits (this is likely to include the Pastor and other clergy), are likely to find it helpful to associate their usual login name with their real identity, since they can then be reminded of pending (and overdue) visits when they log in. This association is created by the database administrator, using the lower part of the "Add or Change Users" form. This can either be done when he/she creates the individual's user record or subsequently. The association cannot be created unless and until the individual has been assigned at least one parish ministry for which the Visitor flag has been set.

Establishing parishioners as Visitors and Users

The most efficient sequence of operations to establish an individual as a Visitor and User of the application is as follows:

1) Enter the Household (if necessary) and personal information for the individual using the "Add Household Data" form.

2) Assign the individual one or more ministries, using the "Add & Change Church Ministries" form. Check the "Visitor" box for at least one of these ministries (checking the box on more than one ministry for the same individual will do no harm).

3) Create the individual's User persona by means of the "Add or Change Users" form. If you check the "Visitor" box on this form additional fields and buttons will appear, enabling you to associate the user persona with the individual's name (and, internally, with his/her full individual record).

2.4   Searching for Names

A standard search technique is used throughout the program to locate individual Household or individual records by surname for subsequent data entry and/or processing. This can make use of standard Access wild-card search strings ("Flet*"; "J?nes"), but it can also use a Soundex search, to find names which (at least when pronounced by a native English speaker) sound like the example given. In general, you enter a name or search string in a text box, and you then press a button on the form to search for matching records. If the search string contains wild-cards, it is treated as a standard Access search string and applied to the full surname. If the search string does not contain wild-cards (i.e. it looks like a normal name), the user will be asked whether or not the program should look for an "exact match". If the answer to this question is "Yes", the program will attempt to find a record with *exactly* that surname (ignoring differences of case). If the answer to the "exact match?" question is "No", the search will find all records for which the Soundex code of the surname is identical to that of the name given. This should normally include the most common alternative spellings and/or misspellings of a specified name.

The Soundex algorithm was devised by Margaret K. Odell and Robert C. Russell for the United States Bureau of Archives in the latter part of the nineteenth century. Its original purpose was to simplify searching through surnames in census data. It is not necessary to understand it in any detail to use it, but a paraphrase of the official US Census bureau description of the algorithm is

included in an Appendix here for the curious.

A Soundex code consists of a letter and three numbers, such as W-252. The hyphen is frequently omitted in practice. The letter is always the first letter of the original name. The remaining consonants in the name are encoded successively according to the rules described in the Appendix, which generally lead to names which sound approximately the same being assigned the same Soundex code. Once the initial letter and three digits have been assigned, any additional letters are disregarded. Trailing zeroes are added if necessary to produce a four-character code. For example:

Washington is coded as W-252 (W, 2 for the S, 5 for the N, 2 for the G, remaining letters disregarded).
Lee is coded as L-000 (L, 000 added).

2.5   Backing up your data

All entered data is kept in the file called Parish Data Files.mdb This file should be backed up regularly (at least once a week), especially when you are entering your initial census data. Backups can, if necessary, be made to a set of floppy disks (always keep at least the three most recent backups, and reuse the disk with the oldest backup on it). If your parish is fairly small, the uncompressed data file should fit on a single, otherwise empty, floppy disk. Larger parishes may find that the file must be compressed by means of a program such as WinZip™, while the largest parishes may need to split even the compressed file between two or more floppy disks. If you routinely use a different and more comprehensive means of backing up the data on your system (Zip disk, writable CD, tape), as you ideally should, you need to make sure that Parish Data Files.mdb, or the directory in which it is found, is included in the regular backup. The other distributed files (Parish Data.mdb, Parish Data.hlp, and Parish Data.cnt) only change when a new version of the program is released. You should keep at least one backup copy of the files on the distribution CD, but it is not otherwise necessary to back up these files on a regular basis, nor to keep the distribution media of prior versions of the program.

2.6   Getting Help

Context-sensitive help is available throughout the program. Pressing F1 at any time will open this Help file at a page which corresponds to the screen, form or report that you are dealing with. Many forms also have pop-up help for some or all of the individual fields within them. You can access this by pressing Shift-F1 after moving the focus to the field with which you need help.

You will normally move the focus to a field by left-clicking in it. If you want help for a button, for a tick box or for a list box, and do not want to left-click the control (which would activate it), you can either right-click it and then click away from the menu that is displayed, or use Tab or Shift-Tab to move the focus to it, again without activating it, before pressing Shift-F1. If there is no pop-up help for an individual field on a form, the full Help file entry for the form will be displayed, just as if you had pressed F1.

Note that Switchboard menu screens and reports do *not* have pop-up help for individual fields or items within them. They only link to full entries in this Help file, which will therefore be activated by pressing either F1 or Shift-F1 when they are being displayed.

2.7   Registration & Support

This is the help file for the evaluation version of Parish Data. To obtain the Registered version, to report bugs, or to suggest additions or improvements, contact pfletch@parish-data.com.

Part III
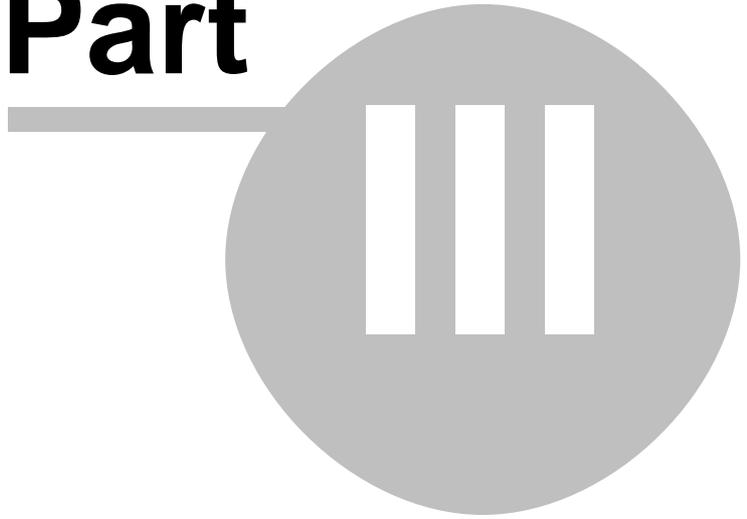
3 Using Parish Data

3.1 Running the Application

You can run the Parish Data application from Access by opening the Parish Data.mdb database file. You can also run it by double-clicking on the file in Windows explorer, or by creating a shortcut to it on your desktop or elsewhere and double-clicking on that. However you run it, there will be a short pause and a few disk accesses as the application initialises, and then you will be presented with the standard login screen.

3.2 Logging In

Enter your user name, if necessary - the immediately previous user's name will be displayed in the "User Name" text box - then enter your password and press the "Login" button. Press the "Change Password" button *before* you press the "Login" button to be given an opportunity to change your password as you login.

Your user name should have been assigned to you by the pastor or system administrator. Please do not attempt to login if you have not been assigned a user name. Do not share user names.

Your password should have been assigned to you with your user name by the pastor or system administrator. If this is the first time you have used Parish Data, you may be required to select a new password immediately after logging in. The pastor or system administrator may also have set up the system to require that you change your password from time to time. If so. you will be prompted to do so at the appropriate time.

If you have changed your mind about logging in, or you find the computer displaying the Parish Data login screen when you want to use it for something else, press the "Exit" button to close the application. Although Access should close as well when you do this, you may sometimes need to close it manually by clicking the X at the top right hand corner of the Access window.

3.2.1 Changing your Password

Your password must consist of a string of 6-20 characters and must contain at least one letter (a-z or A-Z) and at least one number (0-9). The ideal password is a string of characters that means something to you and you can remember easily but others would not be likely to guess. Case is significant - "red4Sun" and "REd4sun" will be treated as different - and you may use any printable character on the keyboard (including spaces and punctuation). The new password may not share more than approximately one third of its characters with the old password. Sharing characters means (to the program code) that a character is in the same position, counting from the beginning, in both words - i.e. "sunrise" and "sundown" share the first three characters, but "sunrise" and "moonrise" would not be flagged as sharing any characters. Passwords containing multiple repeated characters (e.g. "aaaa") or long (more than three characters) ascending or descending character sequences ("12345", "ZYXWV") will also be rejected.

Enter your existing password (the one you just used to log in) in the top text box - this is to enhance security - and enter your new password in *each* of the two other text boxes. Then press the "Proceed" button to continue. The new password will be checked to verify that it obeys the rules set out above. If it does not, you will be asked to reenter it.

Press the "Cancel" button to continue without changing your password. Note, however, that if you press "Cancel" when you reached this screen because the system *required* a password change (the system administrator can require that a new user changes his/her password on the first login, and/or that passwords be changed at regular intervals), you will not be able to proceed further and will immediately be logged out.

3.2.2 Visit Reminders

A user who is known (to the program) to be a Minister who makes Parish visits is reminded if there are any visits which are scheduled for the current date (or overdue) when he/she logs in. A list of these visits can optionally be displayed. The form that displays this list is read-only. Visit information cannot be changed or deleted from it.

3.3 "Switchboard" menus

You navigate within Parish Data by making choices from menus. You choose a menu option by clicking the button to the right of the text describing what you want to do. Clicking on the text itself also works. These are standard Access Switchboard menus and differ one from another only in the choices listed.

The first menu which you see after you login is the Parish Data main menu. You need to return to this menu to logout or close the program. All menus other than the Main menu have an option to return you to the Main menu. All menus below the second level also have an option to return you to the next level up. Generally speaking, when you close a form or report you return to the menu from which you opened it.

3.3.1 Main Switchboard

This is the main starting point for using Parish Data. You arrive here after you login and you need to come back here in order to log out (to let another user log in) or close the program.

Your choices here are as follows:

Enter/Edit Household and Parishioner Data
This takes you to a small family of menus which allow you to add, change and review information about the people and households in the parish. Click on this link for more information about this option.

Schedule and Record Visits
This takes you to a second level menu which allows you to schedule and record the outcome of visits to parishioners. You will not generally be able to access this menu unless you are a Parish Minister who customarily makes such visits. Click here for more information about this option.

View and Print Reports
This takes you to a small family of menus which allow you to set up parameters for, view, and print reports from the database. Most people can access this menu but access to some submenus and reports may be restricted. Click here for more information about this option.

Database Maintenance
This takes you to a second level menu which allows you to perform various administrative functions, including creating new users and modifying user privileges. You will not generally be able to access this menu unless you are the system administrator or the pastor. Click here for more information about this option.

Logout (to login as a different user)
As the label suggests, this clears all the identification data for the currently logged in user and takes you back to the Login Screen. If the computer you are using is mostly used to run Parish Data, you should generally choose this option when you finish a session. If the computer is frequently used by others and/or for other purposes, it is preferable to Close and Exit.

Close and Exit
This closes Parish Data and should also close the Access program. If the main Access screen remains open, close it by clicking on the X in its top right hand corner.

3.3.2   Entering and Editing Parishioner Data

This is the top level menu for addition, entry, and review of Parishioner and Household data. The most commonly used data entry forms are accessible directly from this menu. A few less frequently used functions require that you first go down a level to the "Other Changes" submenu.

Your choices here are as follows:

Add and Change Household and Individual Records
Opens the "Household Data" form, which allows you to add new households and/or parishioners and change existing household and parishioner records. If you want to move an existing parishioner to a different household (without deleting and re-entering the personal information), you must use the special form which is found on the "Other Changes" submenu. You can delete records from this form (e.g. if a parishioner has moved away), but deaths should normally be recorded using the special form which is reached from lower down on this menu, since this preserves some information about the deceased in the database.

Open Household Rolodex
Opens a form which gives a Rolodex™-like display of names and addresses for all the Households in the parish, sorted by surname. The data in the Rolodex display cannot be edited, but clicking on a name or address and pressing the "Display Household Information" button brings up the "Household Data" form with the data for the chosen Household loaded for editing.

Add and Change Church Ministries
Opens the form which allows you to associate parish Ministries (Pastor, Eucharistic Minister, Deacon, Altar Server, etc.) with individuals.

Record Deaths
Opens the form which is used to record deaths. The deceased parishioner is no longer associated with his/her previous household and is excluded from most reports, mailings, etc., but most of the other recorded information about him/her is preserved and can be accessed by means of specific queries and reports. In particular, information about family relationships with other parishioners is preserved.

Record Major Gifts
Opens the form which is used to record major gifts (in cash or in kind) to the parish. Major gifts may be defined in any way that seems useful.

Record other Changes
Opens the "Other Changes" submenu.

Return to Main Menu
Returns to the Main Switchboard.

3.3.2.1   Other Changes Submenu

Your choices here are as follows:

Move an Individual between Households
This opens the form which is used to move an individual from one household to another. If the individual is moving to what will be a new household, the "Household Data" form, opened from the main data entry menu, should be used to create a household record for it first.

Record Relationships between Individuals
This opens a form which can be used to record family relationships between individuals. Generally speaking, the relationships between individuals in a Household and their Head of Household are recorded automatically when their data is entered. This form can be used to record relationships between individuals in the same household who are related to each other but not to their Head of Household, and relationships between individuals in different households. A given relationship only

needs to be entered once - i.e. recording that John Jones is Mary Smith's father automatically records that Mary Smith is John Jones's child. Note, however, that recording that both Mary Smith and Brian Jones are children of John Jones does not automatically record that they are siblings (which need not be the case, of course).

Return to Previous Menu
Returns to the main data entry menu.

Return to Main Menu
Returns to the Main Switchboard.

3.3.3 Schedule and Record Visits

The forms and reports which are accessed from this menu have to do with scheduling and recording parish visits. The menu and its associated forms and reports are generally only accessible to users who have been given the appropriate privileges - usually those who are Visitors. The distinction between regular visits and sick visits may be thought to be a slightly artificial one. However, the regular visit form is considerably simpler than the sick visit form. The sick visit form has a tick box to record the administration of the Sacrament of Anointing of the Sick and also allows the recording of Next of Kin details. The individual's Next of Kin does not need to be a parishioner, nor already in the database - if he/she is not a parishioner, a data input form which requires only a limited amount of data can be accessed from the Sick Visit form to allow the entry of his/her name and contact information.

It is assumed that visits will normally be scheduled in advance, and Ministers who have scheduled visits are warned of visits which are due (or overdue) when they log in. However, there is nothing in the system to prevent the recording of visits after they have taken place. The reports which are accessible from this menu allow lists of scheduled or completed visits to be printed out, either by and for individual visitors or (usually by the pastor) for all visitors.

The choices on this menu are as follows:

Schedule and Record regular Parish Visits
Opens the form which is used to schedule and record regular visits.

Schedule and Record Sick Visits
Opens the form which is used to schedule and record sick visits.

View/Print Visit Lists
Opens a form which sets up a few optional parameters for the (scheduled) Visit List report, and then runs the report. For more details see the help screen for the setup form.

Return to Main Menu
Returns to the Main Switchboard.

3.3.4 View and Print Reports

This is the top level menu for viewing and printing reports. The most commonly used reports are accessible directly from this menu. To gain access to some of the less commonly used and more selective reports you must first go down a level to the "More Selective Reports" submenu.

Your choices here are as follows:

View/Print Alphabetical Parish List
View or print out a list of individuals in the Parish, together with their addresses and telephone numbers, sorted alphabetically by last name.

View/Print Geographical Household List
View or print out a list of households in the Parish, with addresses and telephone numbers, sorted alphabetically by post town.

View/Print Parishioner Interests/Skills Report
View or print out a list of parishioners who have offered or specified specific talents or skills, sorted alphabetically by talent/skill. This report picks up entries in the "Interests" or "Skills" fields.

More selective Reports
Opens the "More Selective Reports" submenu.

Return to Main Menu
Returns to the Main Switchboard.

3.3.4.1   More Selective Reports

Your choices here are as follows:

View/Print Parishioner List by age group
Opens a form which allows you to specify an age range and (if desired) groupings within it to produce a list of parishioners in a given age group. For more details, see the help page for the setup form.

View/Print Parishioner Interest Report by age group
Opens a form which allows you to specify an age range for the Parishioner Interest/Talent report, the non-selective version of which is accessible from the main report menu.

View/Print Visit Lists
Opens a form which sets up a few optional parameters for the (scheduled) Visit List report, and then runs the report. This menu option is generally only available to users with the appropriate privileges - i.e. normally only to Ministers who are Parish Visitors.For more details see the help screen for the setup form.

Return to Previous Menu
Returns to the main report menu.

Return to Main Menu
Returns to the Main Switchboard.

3.3.5   Database Maintenance

This menu gives access to a number of functions which should normally only be needed by the Pastor or database administrator. It is not accessible to users without Administrator privileges.

Your choices are as follows:

Add or Change Users
This is the only important maintenance function currently implemented. It opens a form which allows the creation of new users and modifications to the privileges and passwords of existing users. For more information, see the Help section for the formrelevant section of the manual.

Close User Interface
This closes the Parish Data menu interface but leaves the database open under Access. There are currently a number of other, easier, ways of doing the same thing, but the option is here for use in a future revision of the program in which the regular user will be more firmly locked in to the menu

interface.

Return to Main Menu
Returns to the Main Switchboard.

3.4 Data Entry Forms

3.4.1 Household Data

The Household form allows the entry of information that is common to the Household (e.g. family name, address, main telephone number(s)), and is the starting point for entry of more detailed information about the individual family members. The personal information entered on this form should be that to be used in communicating with the household or family as a unit. Similarly, the notes field on this page (which will usually only be visible to users with the appropriate privileges - generally the Pastor or Assistant Pastor(s)) - should be used for notes about the household or family, rather than about a specific individual. The directions field is intended to be used for geographical directions to get to the house, if this is not simply a matter of finding a house number on a street. It should not be used for confidential data.

When entering data for a Household for the first time, you should generally fill in all the relevant fields on this page before pressing the "Add a new individual...." button to fill in information for the first individual in the household. You will not be permitted to proceed to add data about an individual if any of the *required* fields on this form are blank. Conversely, you will receive a warning if you try to close or otherwise leave a Household record that has no associated individual records, though you will be allowed to do this if you confirm that you really intend to (e.g. if you are creating a new Household to move an existing parishioner into).

In order to change or edit information about an existing Household, you first need to find its record in the database. You can do this either by using the navigation buttons at the bottom of the form to page through the records (which are displayed in alphabetical order) or by using the form which pops up when you press the "Find Household" button to specify the surname(s) for the Household(s) you want to find. The search form works in the same way as the search facilities elsewhere in the application. See the Helpmanual section on Searching for Names for further information.

Here and elsewhere, certain types of fields expect text input either to be in a specific format or to be in one of a limited number of possible formats.

Telephone numbers may be entered in a number of ways. If an area code has not been entered (which is normally deduced from the number of digits entered), the parish's local area code (01480 for the evaluation version) is assumed and stored in the database. If the area code *is* entered, it must be in parentheses or separated from the rest of the number by a hyphen or space. Additional hyphens or spaces elsewhere in the number are ignored. The entered number is converted to a standard format for storage and display.

The letters in postcodes are converted to upper case on entry, and the postcode is checked for reasonableness (valid arrangement of letters and numbers). Postcode checking and/or lookup is not (currently) implemented, so a postcode which is non-existent but has the format of a valid postcode will not be rejected.

Email addresses should be of the form; "user.name@isp.com" and are checked for reasonableness (at least one dot in the part after the @ sign; no trailing or consecutive dots in either part).

In the subform at the bottom of the Household Data entry form, the text boxes containing the names of the individual household members are read-only. Only the push buttons beside the names in this subform are functional. The "Edit Individual Data" push button brings up the Individual Data Entry form with the data for the named individual loaded. The "Delete Individual"

push button triggers a dialog to delete the record for the named individual. Deleted records cannot be recovered, so it is important not to delete the wrong person. It is not necessary to delete individual members before deleting their Household (e.g. if an entire family has moved out of the parish), since deleting a Household automatically deletes all its members.

Deleting "all records for this Household" automatically deletes the records of all its individual members, as well as the Houshold record. Here as elsewhere, once confirmed, deletes cannot generally be reversed! This is one of many good reasons to keep backup copies of the database.

For information about the Individual Data entry form, see its Help pageits manual page.

3.4.1.1 Find Household Subform

This form is used to specify and search for the (surname for) a Household to be displayed on the Household Data form or the Move Individual form. Enter the surname to search for in the text box at the top of the form in the normal way (see Searching for Names) and press the Find Record button to display the names and addresses of all the Households which match the search criterion in the subform. Pressing any of the three buttons at the bottom of this form closes it and returns the focus to the main Household Data form. The buttons differ only in the records which are displayed on return to the Household Data form, as follows:

Display single record
If you click on a name or address in the subform before pressing this button, the form which called the subform will show only the data for the record on which you clicked when you return to it. By default, if you have not clicked anywhere, the single record displayed in the calling form will be the first one shown in the subform.

Display all selected records
If you press this button, the form which called the subform will be restricted to displaying the same subset of records as is being displayed in the subform.

Abandon Search
If you press this button, the form which called the subform will, as usual, be able to display all of the records in the database, without restriction.

3.4.2 Individual Data

This is the largest and most comprehensive form in the application, and is divided into four screens. You can move between the screens by clicking on the appropriate tab at the top of the page. The individual's names are *displayed* on all four screens but can only be *edited* only on the first one (click the left hand tab). You can delete an entire individual record from this form but you will usually find it faster and easier to delete individual records from the Household Data form.

Address, etc.
You will always see this screen when the form opens, and you should also leave it from this screen by clicking one of the buttons on its lower section. This screen allows entry and/or editing of contact information that is specific to the individual. For the first individual entered for each Household (assumed to be the Head of Household), many of the fields default to the values of corresponding fields from the Household Data form. For other individuals subsequently added to the Household, only the last name and home telephone and fax numbers are carried over as defaults. For most people, many of the fields on this screen will be left blank. As is the case for the Household form, telephone numbers may be entered in a number of ways. If an area code has not been entered (which is normally deduced from the number of digits entered), the parish's local area code (01480 for the evaluation version) is assumed and stored in the database. If the area code *is* entered, it must be in parentheses or separated from the rest of the number by a hyphen or space. Additional hyphens or spaces elsewhere in the number are ignored. The entered number is converted to a standard format for storage and display.
Since mobile phone numbers are, by definition, *not* in the local area, explicit area codes are *required* for them.

If you are adding multiple members to the same Household, you can use the "Add another individual...." button to add successive individuals, rather than returning to the Household Data form after each one.

Personal Information

This screen allows you to enter and/or edit various items of information about the individual, including his/her religion, occupation and/or school and whether he/she has received certain Sacraments (Baptism or Reception into the church, first Communion, etc.). The dates of receipt of these Sacraments should be entered, if they are known. If the dates are not (usually for older adults) either an approximate date may be entered or *the individual's birthdate* may be used to indicate: "Yes, but date not known". To facilitate the use of this system, double-clicking in one of the Sacrament date fields will enter the individual's birthdate in that field, assuming that the birthdate has already been entered on the first screen. Double-clicking twice in these fields will bring up the popup calendar.

For individuals who are not Heads of Households, this screen also allows you to record the family relationship (if any) between the individual and his/her Head of Household and to specify whether the Head of Household should be recorded as his/her Next of Kin (which is the default). If this default action is changed, by unticking the appropriate box, you will be given an opportunity to specify whether the changed action (i.e. no-one is automatically specified as Next of Kin for another individual) should be made the default for the rest of the session - changing this setting is effective until you change it again or log out.

For users with the appropriate privileges, any Pastor's notes about the individual can be reviewed and edited on this screen.

Interests & Ministries

This screen allows you to enter or delete any church-related interests, and/or skills, trades, or professions the individual may have declared on a census form or subsequently. It also displays, but does not allow changes in, any Ministries that he/she may have been assigned in the parish. You cannot currently add new items to the drop-down lists of interests and skills. This deficiency will be corrected in the next version of the application.

Financial Information

Parish Data is not primarily focussed on the parish's financial affairs. However, this screen allows you to record whether/when the individual has returned a Gift Aid form and displays any major gifts he/she may have made to the parish. Double-clicking in the Gift Aid form date field enters the current date. Double-clicking a second time brings up the popup calendar. If there is a demand for more detailed financial record-keeping in association with Parish Data, it may be developed as a semi-independent add-on, using the biographical data from Parish Data but keeping the financial data in a separate file.

3.4.3   Household Rolodex

This form presents a Rolodex™-like display of names and addresses for all the Households in the Parish, sorted by surname. The double row of tabs along the top of the form specifies the first letter of the surname, and the subform below the tabs displays names and addresses for all the specified Households. Clicking anywhere on the listing for a given Household and pressing the "Display Household Information" button will bring up the Household information for editing with the "Household Data Entry" form.

3.4.4   Add & Change Church Ministries

This form is used to assign and change individuals' parish ministries. It is generally only used by and/or accessible to the Pastor, Assistant Pastor, and database administrator. Some of the information entered here is used elsewhere in the system, e.g. to identify a database user who is also a Visitor so that his/her pending visits can be displayed at login.

The nomenclature and handling of Parishioners, Ministers, Visitors, and database Users in the application can be a little confusing, particularly when you are first entering the data in the

database. Some data input forms depend on the presence of information that has (or should have) been entered on other forms, so trying to enter information in the wrong sequence can lead to frustration. See the relevant section in the introduction for an overview of this issue.

Entering Ministry data

You should use the application's usual search method to locate an individual record for further data entry or processing. If the individual record cannot be found or has not yet been created, you can press the "Add new Household and/or parishioner" button to bring up the "Household Data Entry" form to locate or add it.

Having located the correct individual record, scroll down in the subform (if necessary) to find a new blank ministry record, find the relevant ministry in the list box, click to highlight it, enter the date of appointment, and, if necessary, tick or untick the "Visitor" box. Double-clicking in the date field will insert the current date, and double-clicking again in this field will bring up the popup calendar. Enter additional ministries for the same individual in the same way.

To delete a ministry assignment, find the individual, find the ministry record in the subform, and press the "Delete Ministry Record" button.

3.4.5 Record Deaths

This form is used to record parishioner deaths. The individual record is not deleted from the database, though much of the information in it (data that are not relevant to a deceased individual) is deleted. Records of the deceased's relationships with other parishioners are retained. Use the usual method to find the record for the deceased individual in the subform, then press the "Record Death" button to record the death. The application code prompts you for and records the date of death. As usual, the popup calendar can be accessed by double-clicking the date box. Additional prompts, screens or messages may appear if the deceased individual was a Head of Household and/or the Next of Kin of another parishioner.

3.4.6 Record Major Gifts

This form is used to record major gifts of cash or property. You locate the database record for the donor in the usual way in the main form (see Searching for Names). You should then use the starred navigation button in the subform (if necessary) to find a new blank record, and complete the fields describing the gift. As usual, double-clicking in the date field will bring up the popup calendar. Tick the "Gift Aid" box for cash gifts if the donor has completed a Gift Aid form, allowing tax at the standard rate to be reclaimed from the Inland Revenue.

3.4.7 Move an individual between Households

This form is used to move an individual from one Household to another. Use either the navigation buttons at the bottom of the form or the "Find Household" button to locate the record for the Household into which you want to move the individual, then use the subform functions in the normal way to locate the individual you want to move. Press the "Move this individual...." button to initiate the move.

3.4.8 Record Family Relationships

This form is used to record or modify family relationships between individuals. It must be used when the two individuals do not live in the same household, or when it is desirable to record relationships within a Household in more detail than the Individual Data form which is accessed from the Household Data form allows (e.g. relationships between individuals in the same household who are related to each other but not to their Head of Household). It may also be used to record relationships between individuals and their Head of Household, if this is more convenient than using the Individual Data form. A specific two-way relationship between individuals only needs to be entered once - i.e. recording that John Jones is Mary Smith's father automatically records that Mary Smith is John Jones's child. Note, however, that recording that both Mary Smith and Brian Jones are children of John Jones does *not* automatically record that they are siblings (since

this does not, in fact, necessarily follow).

Use each of the two subforms in the usual way to locate the two individuals whose relationship is to be recorded or modified. Specify the relationship between them by using the list box between the subforms and press the "Confirm Relationship" button to record it. Note that any previously recorded relationship between the two individuals whose details are shown in the subforms is *not* displayed unless/until the "Show Relationship" button is pressed, but that any previously recorded relationship will be replaced by a newly defined one. To delete any record of a relationship between two individuals, set the relationship in the list box to "None" and confirm it.

3.4.9 Schedule and record Parish Visits

This forms allows the scheduling (and cancelling) of regular parish visits. A separate form, which allows the entry of more information, is used to schedule and record Sick visits.

To schedule a visit, locate the individual record for the parishioner to be visited in the normal way, locate a blank Visit record (if necessary) by pressing the starred navigation button in the subform, and then enter the visit details. The "Date of request" defaults to the current date, but you may change this if necessary - double-clicking in this field brings up the popup calendar. Double-clicking in the "Scheduled date" box enters the current date. Double-clicking again in this field brings up the popup calendar.

To record a previously scheduled visit, locate the individual record for the parishioner to be visited and use the navigation buttons in the subform (if necessary) to locate the record for the visit that has now been made. The "Active Records Only" box should normally be left ticked when recording visits, to display only records representing *incomplete* visits - i.e. visits that have been scheduled but have no completion date. Unticking the box will allow the display of all recorded visits for the selected individual, including completed ones. Enter any notes (if desired) and the date of the visit. Double-clicking in the "Date of Visit" box enters the current date. Double-clicking again in this field brings up the popup calendar.

The "Schedule Repeated Visits" Button
Once you have scheduled one visit, you can click this button to bring up a subform which allows one or more subsequent visits to be scheduled on a weekly, monthly, or other regular basis. The single visit whose details are being displayed when you press this button is used as a template for the additional repeated visits, so that if it is scheduled for (e.g.) the first Friday of the month, this will be one of the options for subsequent months. The same subform is used to schedule repeated Sick Visits.

The "Cancel Multiple Visits" Button
This button allows you to cancel multiple pending visits at once. Only records for incomplete visits (as defined above) will be affected, whatever the state of the "Active Records Only" tick box. Two options are offered: one is to cancel all incomplete visits *to* the specified *individual* (by all visitors), which may be useful if the individual has died or moved away. The other is to cancel all incomplete visits *by* the specified *Visitor*, which may be useful if the Visitor has died, resigned, or moved away.

3.4.10 Schedule and record Sick Visits

This forms allows the scheduling (and cancelling) of Sick visits. A separate form, which does not require the entry of as much information, is used to schedule and record regular Parish visits. In addition to the information recorded for normal visits, the Sick Visit form has a check box to record administration of the Sacrament of the Sick and a second page for the recording of Next of Kin information.

To schedule a visit, locate the individual record for the parishioner to be visited iin the normal way, locate a blank Visit record (if necessary) by pressing the starred navigation button in the subform, and enter the visit details. The "Date of request" defaults to the current date, but you can change this if necessary - double-clicking in this field brings up the popup calendar. Double-clicking in the "Scheduled date" box enters the current date. Double-clicking again in this field brings up the popup calendar.

To record a visit, locate the individual record for the parishioner to be visited, and use the navigation buttons in the subform (if necessary) to locate the record for the visit that has now been made. The "Active Records Only" box should normally be left ticked when recording visits, to display only records representing *incomplete* visits - i.e. visits that have been scheduled but have no completion date. Unticking the box will allow the display of all recorded visits for the selected individual, including completed ones. Enter any notes (if desired) and the date of the visit. Double-clicking in the "Date of Visit" box enters the current date. Double-clicking again in this field brings up the popup calendar. Tick the "Sacrament of the Sick" box if appropriate.

The "Schedule Repeated Visits" Button

Once a visit has been scheduled, you can click this button to bring up a subform which allows one or more subsequent visits to be scheduled on a weekly, monthly, or other regular basis. The single visit whose details are being displayed when you press this button is used as a template for the additional visits, so that if it is scheduled for (e.g.) the first Friday of the month, this will be one of the options for subsequent months. The same subform is used to schedule repeated regular Visits.

The "Cancel Multiple Visits" Button

This button allows you to cancel multiple pending visits at once. Only records for incomplete visits (as defined above) will be affected, whatever the state of the "Active Records Only" tick box. Two options are offered: one is to cancel all incomplete visits *to* the specified *individual* (by all visitors), which may be useful if the individual has died or moved away. The other is to cancel all incomplete visits *by* the specified *Visitor*, which may be useful if the Visitor has died, resigned, or moved away.

Entering or changing Next of Kin information

You can move to the second page of the Sick Visit form by clicking on the right hand tab at the top of the form. It allows the recording of Next of Kin information. The usual approach is used to find the individual record for the next of kin. By default, when information for a Household is entered, the individual recorded as Head of Household is designated as next of kin for everyone else in the Household - this default can be overridden. It is always necessary to enter the Next of Kin information manually for an individual if he/she is the Head of (and/or the only individual in) his/her Household. Since a parishioner's next of kin may sometimes *not* him- or herself be a parishioner, the "Enter data for new Individual" button opens a form which is intended to allow the entry of contact data for such a new *non-parishioner* individual. If the next of kin is a *parishioner* whose information has not yet been entered, this popup form should not normally be used - his/her details should be entered using the Household and/or Individual data entry forms in the usual way. If the popup form is used, the "Parishioner (Y/N):" box must be ticked, otherwise it will not be possible to find and display the record in order to enter other information.

By default, nothing is displayed in the lower part of the subform on the "Next of Kin" page when it is first opened unless Next of Kin information has already been entered for the individual to be visited (whose name is displayed in the box near the top of the screen). If Next of Kin information has previously been entered, the name and contact details of the next of kin will be shown. When the fields on he lower part of the page are being used to search for the individual record for the next of kin, they will (obviously) become visible, but the individual whose details are shown there will not actually be recorded as next of kin to the person being visited unless the "Designate this individual as Next of Kin" button is pressed.

3.4.11 Schedule Repeated Visits

This form can be accessed from the Schedule and Record Parish Visits form or from the Schedule and Record Sick Visits form, and allows multiple visits (of the type determined by the calling form) to be scheduled at once. It uses the details (Visitor, date) from a previously entered visit and allows up to 20 further visits to be scheduled at intervals of one or more days, weeks, or months. Weekly visits are scheduled on the same weekday as the previously entered visit in subsequent weeks. Monthly visits can be scheduled on the same date in subsequent months, on the same weekday (e.g. second Friday in the month, third Tuesday in the month), or on the same day of the week in the same week of the month (taking the first week in the month for this purpose to start on the first *Sunday* in the month). When the specified day does not exist in a particular month (e.g. the fifth Friday in a month that only has four) the scheduled date will be backed up to

the last occurrence of the specified weekday in the month. Visits can be scheduled no more than a year ahead, so the maximum possible number of 20 visits can actually only be scheduled on a daily or weekly basis - only up to 12 monthly visits or up to 6 bimonthly visits can be scheduled, and so on. If a combination of settings is used that would result in one or more visits being scheduled more than a year ahead, only the visits falling within the year are scheduled and a warning is issued.

By default, a single additional visit will be scheduled for the same weekday in the subsequent month.

"Schedule these Visits" button
Press this button after setting up the number and frequency of additional visits to schedule using the list boxes and number box on the form.

"Cancel these Visits" button
This button will cancel the last set of repeated visits scheduled. It can be used to cancel a set of visits scheduled in error, but only while the form remains open. It does *not* matter if the settings of the list boxes and/or number box on the form have been changed before the error is noticed. If this form is closed and reopened, on the other hand, the record of the last set of visits scheduled is lost. Similarly, if you have used the form to schedule two or more different *sets* of visits, based on a single example (e.g. two at weekly intervals and then a further two at monthly intervals), only the last set scheduled will be deleted if this button is clicked.

3.4.12 Limited Individual Data Entry

This screen allows entry and/or editing of contact information that is specific to an individual. As is the case for the Household and Individual data entry forms, telephone numbers may be entered in a number of ways. If an area code has not been entered (which is normally deduced from the number of digits entered), the parish's local area code (01480 for the evaluation version) is assumed and stored in the database. If the area code *is* entered, it must be in parentheses or separated from the rest of the number by a hyphen or space. Additional hyphens or spaces elsewhere in the number are ignored. The entered number is converted to a standard format for storage and display. Since mobile phone numbers are, by definition, *not* in the local area, explicit area codes are *required* for them.

The letters in postcodes are converted to upper case on entry, and the postcode is checked for reasonableness (valid arrangement of letters and numbers). Postcode checking and/or lookup is not (currently) implemented, so a postcode which is non-existent but has a valid format will not be rejected.

Email addresses should be of the form; "user.name@isp.com" and are checked for reasonableness (at least one dot in the part after the @ sign; no trailing or consecutive dots in either part).

3.4.13 Add or Edit Users

This form is used by the database administrator to add and edit Users - individuals with access to the database. Existing users are located by means of the navigation buttons at the bottom of the form. The records of existing users are displayed in the order in which they were created - this is because the names and passwords are stored in an encrypted format and only (in the case of the names) unencrypted for display purposes - they cannot, therefore, be searched for or sorted alphabetically. The starred navigation button is used, as usual, to add a new user record.

Each user must have a distinct name, password, and initials (these are used internally to indicate who has made additions and changes to data in the database). These details are entered or changed in the top section of the screen. Privileges to access various areas and/or view certain data within the database are set by highlighting or clearing the radio buttons in the middle of the screen.

User Name

User names must contain at least 5 characters, and may contain numbers and/or punctuation characters as well as letters (though you will rarely want to do this). Case is ignored here - "RWilliams", "rwilliams", and "RWILLIAMS" are all equivalent.

Password

Passwords must consist of a string of 6-20 characters and must contain at least one letter (a-z or A-Z) and at least one number (0-9). Case *is* significant - "red4Sun" and "REd4sun" will be treated as different - and you may use any printable character on the keyboard (including spaces and punctuation). Passwords should not contain multiple repeated characters (e.g. "aaaa") or long (more than three characters) ascending or descending character sequences ("12345", "ZYXWV") - passwords which do not obey these rules will be rejected.

User Initials

User Initials must consist of 3 or 4 characters, and letters will be forced to upper case. They must be unique within the database - if you have two "JAS"s, one should be assigned a slightly different set of initials (perhaps "JAS1").

Parish Visitor

The bottom part of the form remains blank unless the "Parish Visitor" box is or has been ticked, when a subform appears displaying the names of all individuals who are currently recorded as being Visitors for the Parish (see <u>Ministers, Visitors, and Users</u>). Locate the record corresponding to this user by using the navigation buttons on the subform. Pressing the "Link to User" button establishes that the User is, in fact, the same person as the Visitor identified in the subform. If an existing User ceases to be a Visitor, the link can be removed by editing the User record and pressing the "Unlink User" button.

3.4.14 Popup Calendar

A popup calendar form is available throughout the application to help you with the entry of dates. Note however that, due to limitations of Access itself, Help is not available when a popup form is being displayed. Double-clicking in many Date fields will immediately display this form. For other Date fields, double-clicking will enter and display a specific date, whose exact value depends on the field. For these fields, double-click a second time in the same field to display the calendar form. Either the mouse or the cursor keys may be used to navigate within the form to display and record the desired date.

The mouse can be used to press the arrow buttons on either side of the displayed month and year to move to the month and year that you want. You can then click on the square corresponding to the desired day. Press the "OK" button to return the chosen date or the "Cancel" button to return with the previous entry in the field (if any) unchanged.

The cursor keys are interpreted as follows:

Left-Arrow	Move to Previous Day
Shift-Left-Arrow	Move to Previous Year
Right-Arrow	Move to Next Day
Shift-Right-Arrow	Move to Next Year
Up-Arrow	Move to Previous Week
Shift-Up-Arrow	Move to Previous Month
Down-Arrow	Move to Next Week
Shift-Down-Arrow	Move to Next Month
Page-Up	Move to Previous Month
Shift-Page-Up	Move to Previous Year
Page-Down	Move to Next Month
Shift-Page-Down	Move to Next Year
Home	Move to Today's Date (in current year)
Shift-Home	Move to Today's Date in selected year.

3.5   Reports

3.5.1   Reports - General Considerations

All the reports have been formatted to fit on plain A4 paper with margins wide enough to avoid the non-printing areas of most modern printers. Running the report initially displays it on the screen rather than printing it directly. You can use the standard Access/Windows Print button or File menu option to send it to the printer. This approach is used is to permit viewing reports without wasting paper and/or printing part of a report.

The Page setup for most reports uses the default (1.00"/25.4mm) Access margin settings. A few reports use a 20mm right margin to allow a little more space for the data. During testing, it was found that the specific page formatting of these reports seemed unaccountably to become undefined from time to time, with page margins being reset to the Access default. We believe that this is an Access problem, and it seems usually (but not always) to happen when some other aspect of the report design or structure is changed. When this happens, each page of the report overflows laterally onto a second page. The cure for this, if it happens, is to use the Page Format File menu option to reset the right margin to the correct value before printing the report.

The report formats have been tested with substantial amounts of real data, but it is always possible that there is a data-dependent problem with one of them that we have not found. Please report any problems you encounter - preferably sending in either the data file or at least a hard copy of the problem report.

The reports currently supplied constitute a very basic and limited subset of what is easily possible by using the data in the database. Requests for additional report formats will be welcomed. If a requested report is considered to be of general utility, the formats to generate it will be supplied free (usually within a week or two) to the requestor and included in the next release of the application. Formats for Reports which appear to be of more limited general interest can also be produced to order. The charge made for this service will depend on the complexity and urgency of the requested work, but is unlikely to be very substantial unless the requirements are very unusual. Part or all of the support time which is included in the Registration fee for the program may also be used to produce custom queries and/or reports.

Users are *not* encouraged to modify queries or report formats which form part of the application, since changes made to these in future releases may not be compatible with your modifications. If you have some Access programming knowledge and skills, and wish to write your own queries and/or reports, we suggest that you use a separate application file which is linked to the tables in Parish Data Files but does not attempt to modify them or the data in them. We cannot be responsible for sorting out problems or data loss which may arise from unauthorised modifications or additions to the Parish Data application.

3.5.2   Report Setup Forms

3.5.2.1   Setup "Visit Lists" Report

This form allows you to specify "from" and "to" dates and a number of other parameters for the report which lists pending (or completed) visits. The "from" date defaults to the current date. The "to" date defaults to 7 days after the "from" date. Double-clicking in either of these fields brings up the popup calendar. By default also, a list including Sick and regular visits for the currently logged in user is produced. Optionally, one of these visit types may be excluded, visits for all Visitors (*not* just the current user) may be displayed, and/or the Pastor's notes may be included in the report. The latter two options are only visible/available if the current user has Pastor privileges.

3.5.2.2   Setup "Aged" Parish List

This form allows you to enter the parameters for a report listing individual parishioners within a specified age range. It allows you to specify the bottom and top limits of the range and to determine whether you wish the individual details in the report to be grouped by age. The age limits entered are understood as being *in*clusive - choosing 0 and 99 will select all parishioners under the age of

100 years (as of the report date). Parishioners of unknown or unstated age will always be excluded.

If the "Group by Age" box is not ticked, the format of the report will be the same as that of the regular Parish List Report, but it will include only parishioners within the specified age range.

If you tick the "Group by Age" box, another text box will appear, allowing you to indicate the age range *for each group* (group size). Whatever the overall range of ages you specify, the group start and end points that fall within the range will be determined by by the group size, as if you had started to count at age 0. For example: if you specify a report including individuals from 2 to 21 years old, grouping in 5-year blocks, the groupings in the report will represent ages 2-4, 5-9, 10-14, 15-19, and 20-21. Similarly, if you specify a report including individuals from 10 to 18 years old, grouping in 3-year blocks, the groupings in the report will represent ages 10-11,12-14, 15-17, and 18. If the "Group by Age" box is ticked, the report format used will be that of the Parish List by Age Report.

3.5.2.3   Setup Interest List by Age

This form allows you to enter the parameters for a report listing the interests or talents of individual parishioners within a specified age range. It allows you to specify the bottom and top limits of the range. The age limits entered are understood as being *in*clusive - choosing 0 and 99 will select all parishioners under the age of 100 years (as of the report date). Parishioners of unknown or unstated age will always be excluded. The report format used will be that for the Interests and Skills Report.

3.5.3   Parish List

This report displays addresses and telephone numbers for all Parishioners in the database in (slightly modified) alphabetical order by surname and first name. The sort order is modified so that individuals with the same surname in the same Household are sorted by their address and kept adjacent to each other. If John and Xantippe Jones live at 2 Parkers Crescent and Fred and Margery Jones live at 5 Hill Way, Xantippe will be listed immediately after John and before Fred in the report - the order of listing of the two families comes from their addresses - 2 being before 5. The same report format is used to produce the complete Parish List (Main Reports Menu) and the age-selected Parish List (Selective Reports Menu).

3.5.4   Parish List by Age

This report displays addresses and telephone numbers of all the Parishioners in the database, grouped by chronological age. Within age groups, the names are sorted in alphabetical order by surname and first name. This Report is generally accessed via a setup form which specifies the overall age range and the size of the age blocks.

3.5.5   Geographical Household List

This report displays addresses and telephone numbers for all the Households in the parish by geographical location. If the "Locality" field was filled in on the Household Data Entry form, its contents is used as the primary sort category. If no "Locality" was entered, the Post Town is used in its place. Any Households for which neither of these fields has been filled in will appear at the beginning of the report with a blank space in the section header where the location should appear. Within "Locality" sections, the records are sorted by street address and house name or number. The sort routine is very exact - minor variations in street name, extra spaces, different punctuation, etc. will all result in this sort not working exactly as it should. The better the data is when it is put in, the more accurate and useful this report will be.

3.5.6 Interests and Skills Report

This report shows the names and addresses of all Parishioners who have specified at least one Interest or Skill. It merges the Interests and Skills entered for individual Parishioners into a single report, sorted by Interest/Skill and (within each section) by last name. Details of individuals who have specified multiple interests and/or skills appear in all relevant sections.

3.5.7 Visit List

This report is intended to allow a Visitor to print out all the information he/she needs to make visits scheduled during a given period of time. It also allows the Pastor to see a summary of all visits scheduled during a particular period. The parameters for the report are set up by means of the "Setup Visit List" form. The report is ordered by date and (if it covers multiple Visitors) by Visitor, and displays the name, address, and phone numbers of parishioners to be visited. If directions are recorded for finding the Household, these are also printed, and (if the pastor is preparing the report) the pastor's notes on the individual may optionally be printed.

Part IV
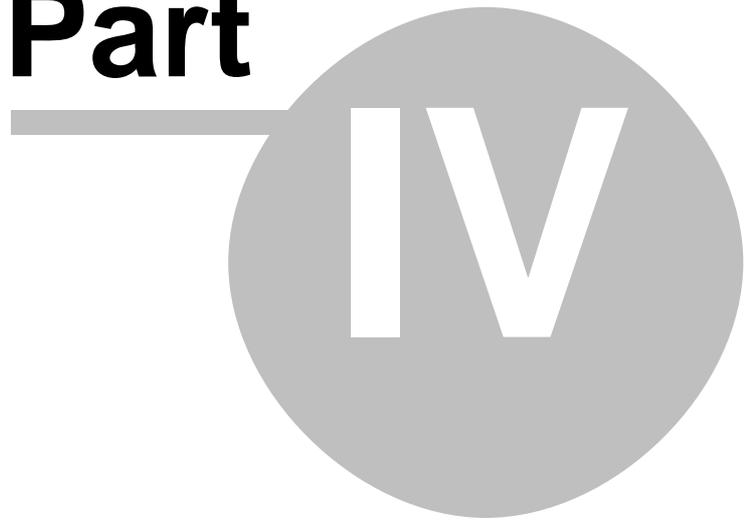
4   Appendices

4.1   The Soundex Algorithm

The Soundex algorithm was devised by Margaret K. Odell and Robert C. Russell for the United States Bureau of Archives in the latter part of the nineteenth century. Its original purpose was to simplify searching through surnames in census data. Every name is represented as a 4-character code consisting of an uppercase letter (which is the same as the first letter of the original name) and three decimal digits. It is not necessary to understand it in any detail to use it, but a paraphrase of the official US Census bureau description of the algorithm is included here for the curious.

A Soundex code consists of a letter and three numbers, such as W-252. The letter is always the first letter of the original name. The remaining consonants in the name are encoded successively according to the rules described in the Appendix, which lead to names which sound approximately the same generally being assigned the same Soundex code. Once the initial letter and three digits have been assigned, any additional letters are disregarded. Trailing zeroes are added if necessary to produce a four-character code. For example:

Washington is coded W-252 (W, 2 for the S, 5 for the N, 2 for the G, remaining letters disregarded).
Lee is coded L-000 (L, 000 added).

Soundex Coding Guide
The number at the beginning of the line encodes any of the letters which follow it.

1   B, F, P, V
2   C, G, J, K, Q, S, X, Z
3   D, T
4   L
5   M, N
6   R

The letters A, E, I, O, U, H, W, and Y are not coded. The vowels (A,E,I,O,U,Y) are normally treated as separator characters according to the additional coding rules given below. The letters H and W are treated as if they did not exist at all - the letters on either side of them are treated as if they were directly adjacent to each other.

Additional Soundex Coding Rules

Names With Double Letters
If the name contains any adjacent double letters, they should be treated as one letter. For example:

Gutierrez is coded G-362 (G, 3 for the T, 6 for the first R, second R ignored, 2 for the Z).

Names with adjacent Letters that have the Same Soundex Code Number
If the name contains two or more adjacent letters that are represented by the same number in the Soundex coding guide, they should be treated as one letter. Examples:

Pfister is coded as P-236 (P, F ignored, 2 for the S, 3 for the T, 6 for the R).
Jackson is coded as J-250 (J, 2 for the C, K ignored, S ignored, 5 for the N, 0 added).
Tymczak is coded as T-522 (T, 5 for the M, 2 for the C, Z ignored, 2 for the K). Since the vowel "A" separates the Z and K, the K is coded.

[*Names with Prefixes*
If a name has a prefix, such as Van, Con, De, Di, La, or Le, code both with and without the prefix because the surname might be listed under either code. Note, however, that Mc and Mac are not considered prefixes.

For example, VanDeusen might be coded two ways:
V-532 (V, 5 for N, 3 for D, 2 for S)

or
D-250 (D, 2 for the S, 5 for the N, 0 added).

This rule from the original system is rarely implemented in modern versions of the Soundex algorithm, and it is *not* implemented in Parish Data. For a computer, distinguishing between names that should be double coded (e.g. DeVere), and names that should not (e.g. Dexter) depends too heavily on correct input formatting to be relied on.]

Consonant Separators
If a vowel (A, E, I, O, U) separates two consonants that have the same soundex code, both consonants are coded. Example:

Tymczak is coded as T-522 (T, 5 for the M, 2 for the C, Z ignored (see "Side-by-Side" rule above), 2 for the K). Since the vowel A separates the Z and K, the K is coded.

If H or W separate two consonants that have the same soundex code, the consonant to the right of the vowel is not coded. Example:

Ashcraft is coded A-261 (A, 2 for the S, C ignored, 6 for the R, 1 for the F). It is not coded A-226.

Index