



## Automation

# Anniversary Report

Carla

Catholic Diocese of Sioux F...

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Diocese of Sioux Falls is utilizing ParishSOFT for parish management. This newsletter will be sent periodically to assist in your transition. Please encourage other ParishSOFT Users in your organization to subscribe. Thank you! Carla Haiar

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Catholic Diocese of Sioux Falls



Family Suite

# Anniversary Report

In ConnectNow Family Suite, you can generate and export an anniversary report requested by the diocese for Anniversary Mass invitations.

1. Click on 'Family Directory' in the top navigation bar.

2. Click on 'Member List' in the sub-navigation bar.

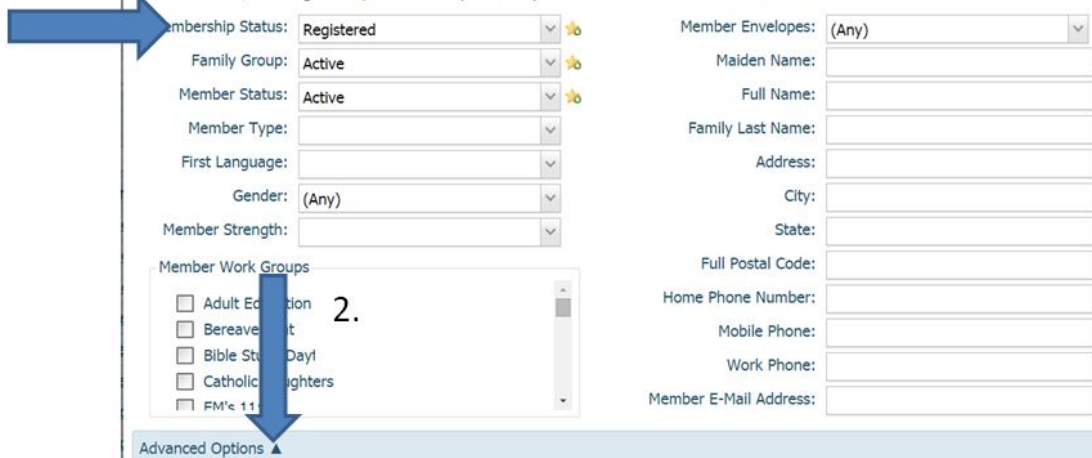
3. Click on the 'Filter' icon (funnel) in the Member List table.

Navigate to the Member List Page.

1. Family Directory
2. Member List
3. Click on the Filter icon.

## 1. Filter

Please enter and/or select the criteria for searching. Only entered and selected values will be applied to by the filter. NOTE: clear any values from the 'Search' box, or change the 'Quick filter' dropdowns if you do not want these additional constraints.



Membership Status: **Registered** Member Envelopes: (Any)

Family Group: **Active** Maiden Name:

Member Status: **Active** Full Name:

Member Type:

First Language:

Family Last Name:

Gender: (Any) Address:

City:

Member Strength:

State:

Full Postal Code:

Home Phone Number:

Mobile Phone:

Work Phone:

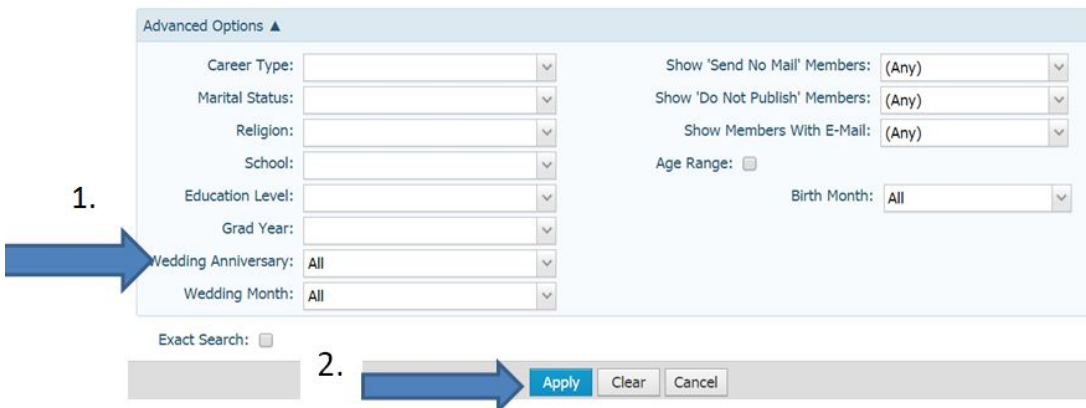
Member E-Mail Address:

Member Work Groups:

- ☐ Adult Education
- ☐ Bereavement
- ☐ Bible Study
- ☐ Catholic Daughters
- ☐ FM's 11

Advanced Options ▲

1. Be sure to select the following filters:  
Membership Status = Registered  
Family Group = Active  
Member Status = Active
2. Click on the Advanced Options icon (triangle)



Advanced Options ▲

Career Type:

Marital Status:

Religion:

School:

Education Level:

Grad Year:

Wedding Anniversary: **All**

Wedding Month: **All**

Exact Search: ☐

Show 'Send No Mail' Members: (Any)

Show 'Do Not Publish' Members: (Any)

Show Members With E-Mail: (Any)

Age Range: ☐


Birth Month: **All**

Apply Clear Cancel

- Advanced Options
1. Wedding Anniversary = All
  2. Wedding Month = All

While the option is available to select by Years (such as 25 or 50), this does not help us with determining who should be invited to the anniversary mass as this number of years married is based on the current date. We wish to see ALL years married and select the actual anniversary year as part of the Matrimony Date.

1.

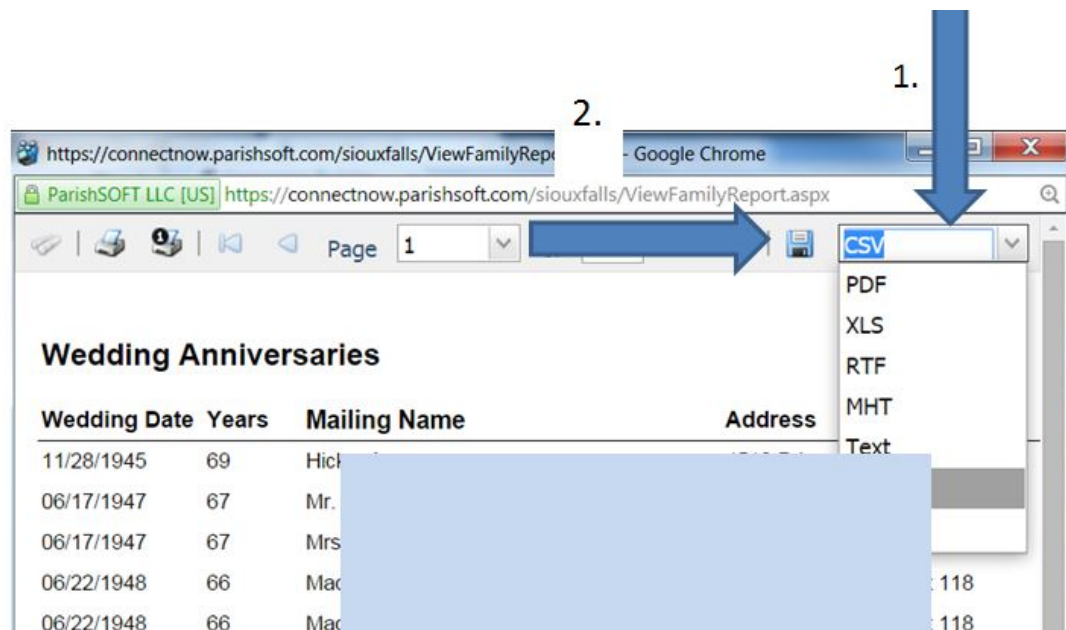
A-Z A B C D E F G H I J K L M N O P Q R S T U V W X Y Z										
0-9 0 1 2 3 4 5 6 7 8 9										
Filter Criteria: None Filter Column: Member Ascending Clear Filter										
50 records        <span>Delete Selected Members</span> <span>Quick Reports</span>										
<input type="checkbox"/>	Member	Family Last Name	Member ID	Registered	Family Group	Member Status	Member Type	Family DUID	Organization of Registration	
<input type="checkbox"/>	Aank		109347	Yes	Active	Active	Wife	72026	Holy Spirit, Sioux Falls	
<input type="checkbox"/>	Aesc		109592	Yes	Active	Active	Husband	72160	Holy Spirit, Sioux Falls	
<input type="checkbox"/>	Aesc		109591	Yes	Active	Active	Wife	72160	Holy Spirit, Sioux Falls	
<input type="checkbox"/>	Aker		112820	Yes	Active	Active	Husband	72835	Holy Spirit, Sioux Falls	
<input type="checkbox"/>	Aker		112821	Yes	Active	Active	Wife	72835	Holy Spirit, Sioux Falls	
<input type="checkbox"/>	Akke		109458	Yes	Active	Active	Head	72086	Holy Spirit, Sioux Falls	
<input type="checkbox"/>	Albe		108318	Yes	Active	Active	Wife	71472	Holy Spirit, Sioux Falls	
<input type="checkbox"/>	Albe		108319	Yes	Active	Active	Husband	71472	Holy Spirit, Sioux Falls	

You will be returned to the Member List where you will see husband and wife listed separately. Please keep in mind that if a Husband/Wife has a Member Status Not Equal to Active, they will not be displayed. It would be a good idea to double check those where only one spouse is listed to verify married status (most importantly, we wish to update the Married Status if the spouse is deceased). In the case of the first record listed above, the husband on this record is ActOther meaning for our diocese he is not Catholic but participates with his/her spouse. This couple SHOULD be invited to an anniversary mass.



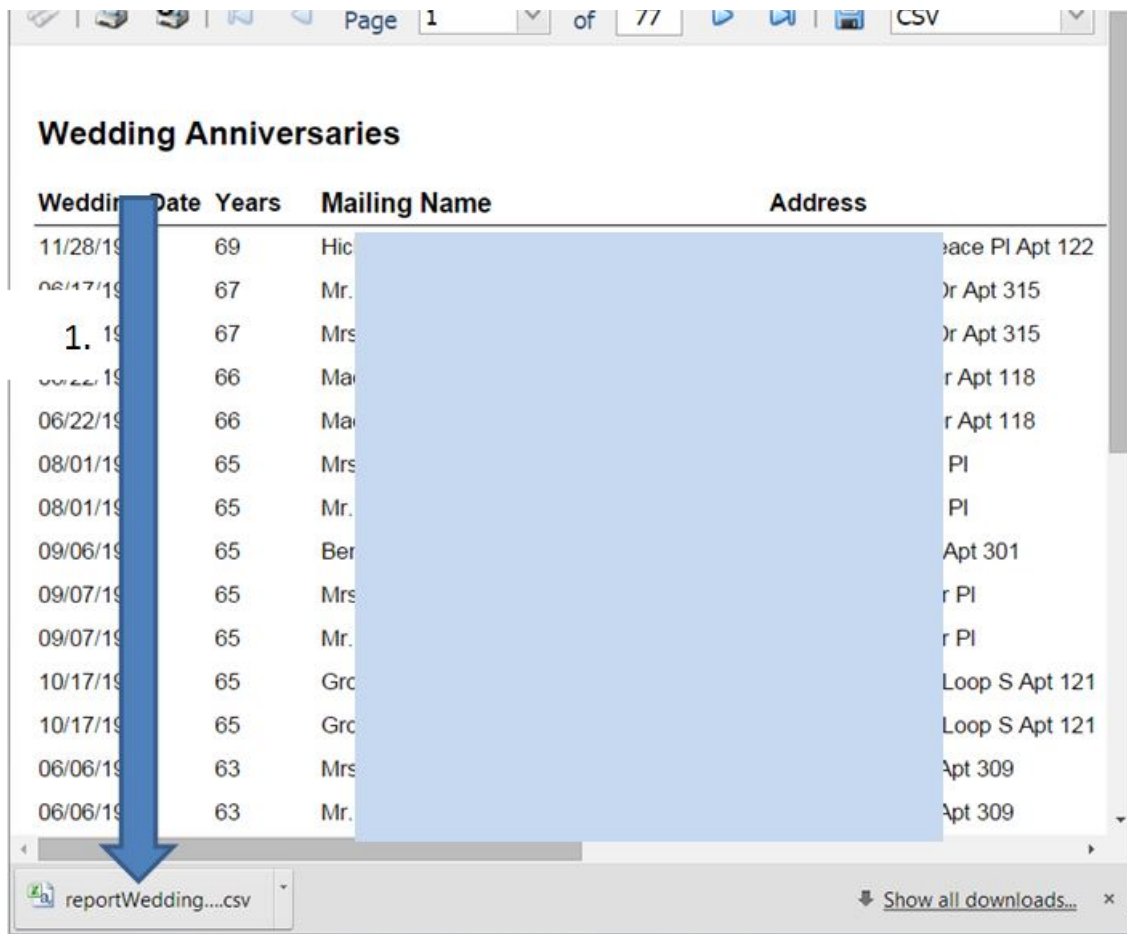
1. Click on Quick Reports
2. Select Wedding Anniversaries

This report will pop up a report window. It is a large report depending on the size of your parish. Please be patient.



1. Change from a PDF file to an CSV file
2. Click on the save icon to save the file.

Once Save is clicked, it will pop the report to your downloads folder and/or the bottom left hand corner of the window.



Double Click on the document to open.

Note: This processing is based on the Google Chrome browser. Other browsers may work differently.

A1									
	A	B	C	D	E	F	G	H	I
1					Holy Spirit Parish				
2	Wedding Anniversaries				Sioux Falls, SD 57103				
3	Wedding Date	Years	Mailing Name	Address	City	State	Zip	Home Phone	
4	11/28/1945	69	Hi						262
5	6/17/1947	67	M						970
6	6/17/1947	67	M						970
7	6/22/1948	66	M						025
8	6/22/1948	66	M						025
9	8/1/1949	65	M						070
10	8/1/1949	65	M						070
11	9/6/1949	65	Be						272
12	9/7/1949	65	M						490
13	9/7/1949	65	M						490
14	10/17/1949	65	Gr						514
15	10/17/1949	65	Gr						514
16	6/6/1951	63	M						102
17	6/6/1951	63	M						102
18	6/16/1951	63	Gi						769
19	6/16/1951	63	Gi						769
20	2/14/1952	62	V						159
21	5/10/1952	62	Bo						615
22	5/10/1952	62	Bo						615
23	6/15/1952	62	La						644
24	4/18/1953	61	Ke						911

The csv file will open up in Excel. Here is where some review is required. If a husband and wife are not both

The CSV file will open up in Excel. There is where some review is required. If a husband and wife are not both listed, confirm that a spouse is not deceased.

For our Anniversary Mass, we want all Married 65 or more years or is older than the year 1949. The year parameters for the 2015 Anniversary Mass are listed below.

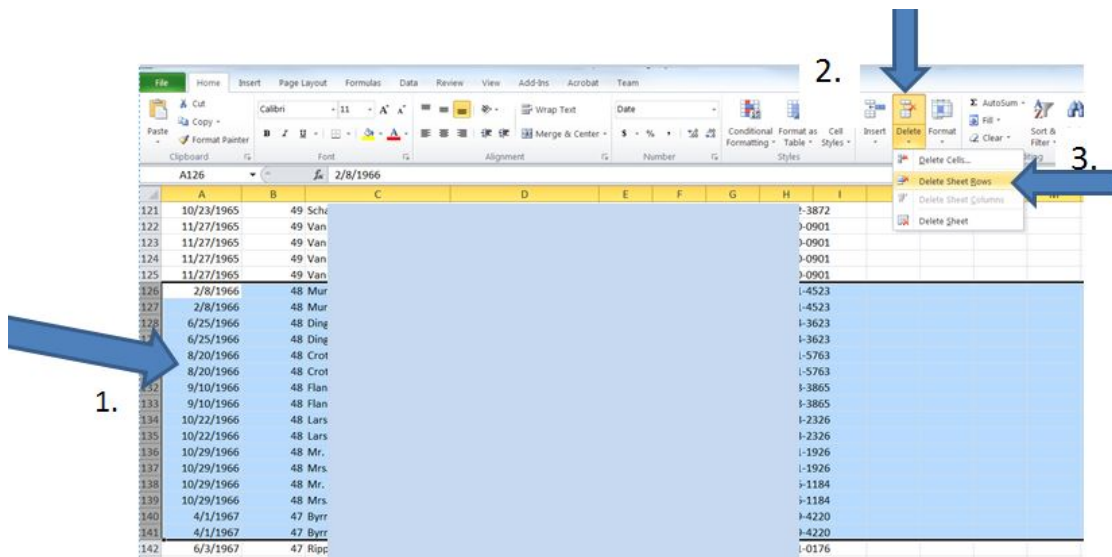
DELETE all ROWS with Wedding dates outside of the given Parameters for the 2015 Anniversary Mass.

65 or Over = 1/1/1949 or older

60 years = 1/1/1955 through 12/31/1955

50 years = 1/1/1965 through 12/31/1965

25 years = 1/1/1990 through 12/31/1990

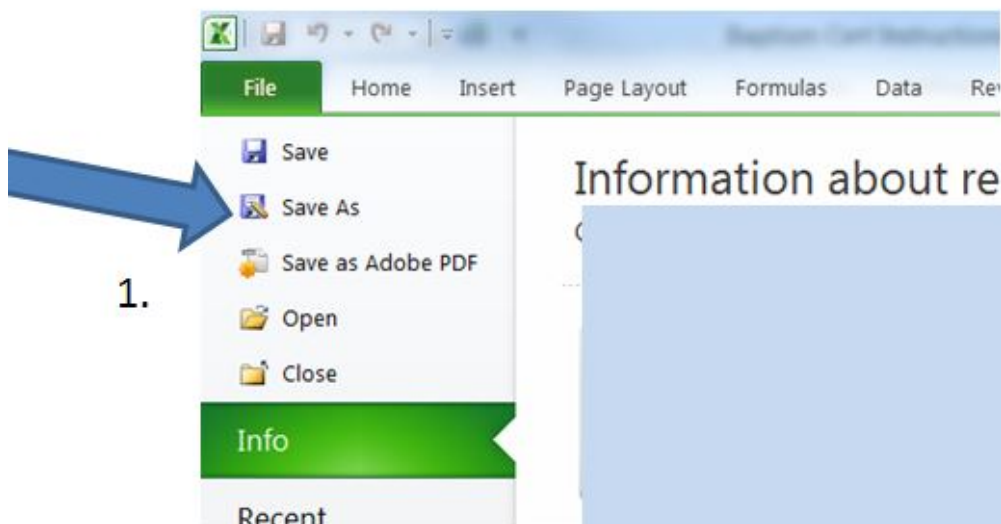


1. To delete rows, select the Rows with a single left click and drag to the last row you wish to select so it is highlighted.

2. With the Home tab selected, click on Delete.

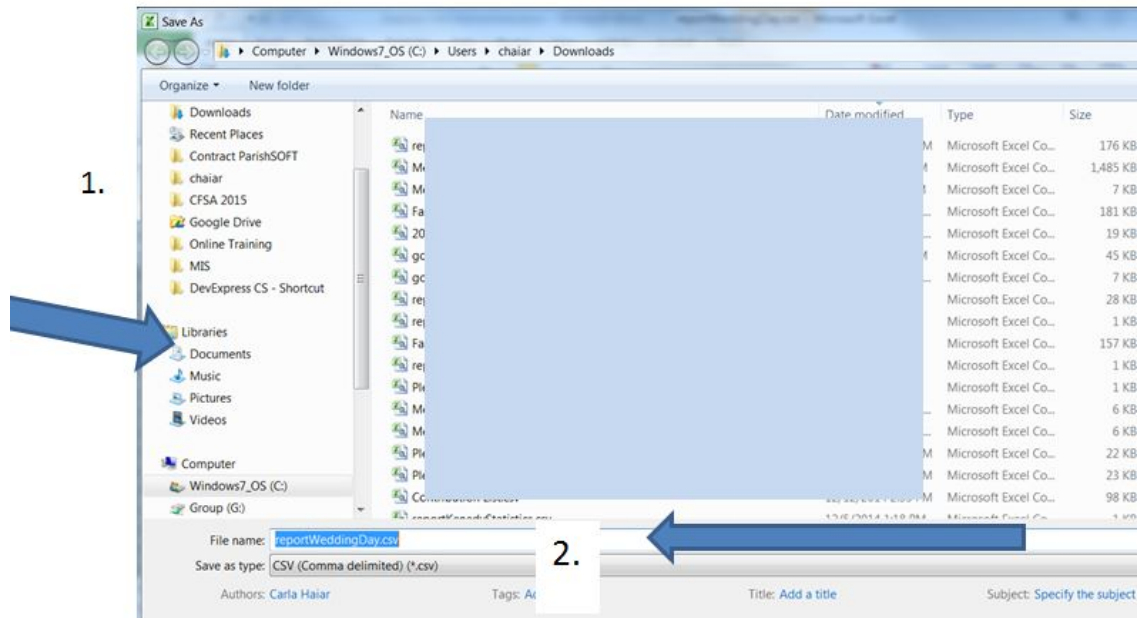
3. Delete Sheet Rows.

Continue to select and Delete Rows as needed.



Information about re

To Save,  
1. Click File, Save As



1. Click on Documents.
2. Change the Name to your Parish Name and Wedding Anniversary. Example: HolySpiritSiouxFalls Wedding Anniversaries.csv

Click Save. Be sure to NOTE you location.

You will get a message that this is a CSV file format - click Yes to keep it in this format.

Close Excel, Click Don't Save (you already saved it)!

Please attached the saved CSV file and email to  
[teiver@sfcatholic.org](mailto:teiver@sfcatholic.org)

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