Statistical Report Instructions – FY24

(Instructions are based on Servant Keeper 8)

Before generating the reports in Servant Keeper

- Review Servant Keeper data to be sure the Religion field on members **Individual profile** contains either Catholic or non-Catholic.

- Review Servant Keeper data to be sure the Type of Household field on the **Family profile** contains either Catholic or Mixed.

- All groups should be in SK from last year and should be used to determine the counts.

The Status Animarum – Household Report – This report is used to determine the number of households in the parish which is entered into the Status Animarium report in PHOL. If this group is in Servant Keeper from last year, check to be sure the family address and zip code fields are included. Once generated, save the report to an excel file and email the file to John Schwob Director of Pastoral Planning at johnschwob@archstl.org so parish scatter maps can be produced.

- 1 Status Animarum Households Report: This group is used to determine the number of households in the parish and is easily created by making a copy of an existing group used for your parish household and/or mailing group. If this group already exists, please verify that the criteria are correct, and the address and zip code fields are included. There is no need to recreate the entire group again, but family address and zip code fields must be selected for the group.
 - > Click on the "Groups Keeper" button this will display your list of available groups.
 - Click on the existing group you want to copy.
 - Click on "Copy Group"
 - You will see the following message "You are about to copy the selected group. Are you sure you want to do this?" Click on "Copy"
 - A new group opens.
 - In the "Enter a name for the group" field enter "Status Animarum Households."
 - In the "List Search results using" field click on Family
 - In the "Choose Search Field from;" field select "Show Family Fields."
 - Verify that the search criteria are correct based on the group that was copied. Make sure to select the family address and family zip code fields.
 - Click on "Save and Search"
 - The group will open and be displayed. In the heading at the top of the group list is a Total Records: followed by the number of records in the group. This number is the Household number needed in the Status Animarum report. Please make a note of it. Save the report as an excel file and send the file to John Schwob at johnschwob@archstl.org

Sample query for Households

Be sure to include all member statuses that represent those families that are currently registered members of your parish. This should include inactive members.

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Add Criteria: R	epeat steps 1	-4 as needed to	build the g	group						
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- Status Animarum Contributors: This group determines how many contributors gave any amount to support the parish during the last fiscal year. If this group already exists, please verify that the criteria is correct. Be sure to change the dates to 7/1/2023 – 6/30/24. There is no need to recreate the entire group again.
 - Click on the "Groups Keeper" button.
 - Click on "Add Group" a new group window will open.
 - In the "Enter a name for the group" field enter "Status Animarum Contributors."
 - In the "List Search results using" field click on Individual
 - In the "Choose Search Field from;" field select "Show Contribution Fields."
 - Enter the following criteria:
 - Select a field to search select "Contributions."
 - Select how to search the field select "Equal to."
 - Enter the item to search for select "General Fund ", "Offertory Gift" or the equivalent fund used to record regular offertory gifts.
 - Contribution Date select "Between" and enter 07/01/2023 and 06/30/2024 for the date range.
 - Total Gift select "Greater than."
 - Click on "Add Criteria"
 - Repeat the above 6 steps if more than one general/offertory fund was used during the search period. Be sure to select OR in the AND/OR column for additional criteria.
 - Click on "Save and Search"
 - The group will open and be displayed. In the heading at the top of the group list is a Total Records: followed by the number of records in the group. This number is the Contributors number needed in the Status Animarum report. Please make a note of it.

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Sample query for Contributors

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	Allen	Susan	(3	314) 664-2816	Active Member							
	Andrews	lim	(3	314) 481-4289 14-013-2353	Active-not use envelope	es						
V	Armbruster	Mark	(3	314) 865-1128	Active Member							

- 3. Status Animarum Catholics: This group is used to determine the total number of Catholics in the parish and is easily created by making a copy of the Status Animarum Households group. If this group already exists, please verify that the criteria are correct. There is no need to recreate the entire group again.
 - Click on the "Groups Keeper" button.
 - Click on the Status Animarum Households group.
 - Click on "Copy Group"
 - You will see the following message "You are about to copy the selected group. Are you sure you want to do this?" Click on "Copy"
 - A new group opens.
 - In the "Enter a name for the group" field enter "Status Animarum Catholics."
 - In the "List Search results using" field click on "Individual"
 - In the "Choose Search Field from;" field select "Show Individual Fields."
 - Verify that the search criteria are correct based on the group copied.
 - Add the following criteria:
 - Select a field to search select "Religion."
 - Select how to search the field "Equal to."
 - Enter the item to search for select "Catholic."
 - Click on "Add Criteria"
 - Click on "Save and Search"
 - The group will open and be displayed. In the heading at the top of the group list is a Total Records: followed by the number of records in the group. This number is the Total Number of Catholics needed in the Status Animarum report. Please make a note of it.

Sample query for Catholics

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- 4. Status Animarum Catholic Households: This group is used to determine the number of Catholic households in the parish and is easily created by making a copy the Status Animarum – Households group.
 - Click on the "Groups Keeper" button this will display your list of available groups.
 - Click on the Status Animarum Households
 - Click on "Copy Group"

- You will see the following message "You are about to copy the selected group. Are you sure you want to do this?" Click on "Copy"
- A new group opens.
 - In the "Enter a name for the group" field enter "Status Animarum Type of Households -Catholics."
 - In the "List Search results using" field click on "Family"
 - In the "Choose Search Field from;" field select "Show Family Fields."
 - Add the following criteria:
 - Select a field to search select "Type of Household."
 - Select how to search the field "Equal to."
 - Enter the item to search for select "Catholic."
 - Click on "Add Criteria"
 - Click on "Save and Search"
- The group will open. In the heading at the top of the group list is a Total Records: followed by the number of records in the group. This number is the Catholic Household number needed in the Status Animarum report. Please make a note of it.

Sample query for Catholic Households

Add/Edit Group					23					
Group	Show Results as	Filter Sear	ch Fields By							
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Category Status	📮 👬 💿 Families									
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Add Criteria: Repeat steps 1-4 as needed to build the group										
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	Andres, Rita		Catholic	Active Member	11843 Devonshire	63	131						
	Andrews, Betty	ý	Catholic	Active Member	4277 Hartford Street	63	116						
	Andrews, Estel	lle	Catholic	Active-not use envelopes	4038 Flora Pl	63	110-3604						
V	Andrews, Jame	es and Julie	Catholic	Active Member	123 Music Way	63	119						
	Andrews, Thor	mas	Catholic	Active-not use envelopes	4038 Flora Pl	63	110-3604						
	Anstey, Cather	rine	Catholic	Active Member	4215 Magnolia Ave	63	110-3501						
	Anstey, Mary		Catholic	Active Member	2255 meste Di	050	545						

- 5 Status Animarum Mixed Households: This group is used to determine the number of Mixed Households in the parish and is easily created by making a copy the Status Animarum – Households group.
 - Click on the "Groups Keeper" button this will display your list of available groups.
 - Click on the Status Animarum Households
 - Click on "Copy Group"
 - You will see the following message "You are about to copy the selected group. Are you sure you want to do this?" Click on "Copy"
 - A new group opens.
 - In the "Enter a name for the group" field enter "Status Animarum Type of Households -Mixed."
 - In the "List Search results using" field click on "Family"
 - In the "Choose Search Field from;" field select "Show Family Fields."
 - Verify that the search criteria are correct based on the group that was copied.
 - Add the following criteria:
 - Select a field to search select "Type of Household."
 - Select how to search the field "Equal to."
 - Enter the item to search for select "Mixed."
 - Click on "Add Criteria"
 - Click on "Save and Search"
 - The group will open and be displayed. In the heading at the top of the group list is a Total Records: followed by the number of records in the group. This number is the Mixed Household number needed in the Status Animarum report. Please make a note of it.

Sample query for Mixed Households

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When you add the total number of Catholic Households and the total number of Mixed Households together it should equal your total households.