

10th Users Group Conference

Holy Family Catholic Church

November 12, 2009

AGENDA

- 8:45 AM SIGN IN & CONTINENTAL BREAKFAST**
- 9:00 AM OPENING PRAYER & WELCOME**
- Reverend Msgr. W. Joseph Corbett, *Vicar General*
 - Brad Wilson, *Chief Financial Officer*
- 9:30 AM GENERAL SESSION**
- Online Giving, Deanna Franco, *Controller, Cathedral of Christ the King*
 - Hosted Logos, Patrick Warner, *PIS Manager*
 - Training Options, Shannon Wiggins, *Training Coordinator*
 - Pastoral Communique, Pat Chivers, *Communications Director* and Meaghan Schroeder, *Assistant Communications Director*
- 10:30 AM BREAK**
- 10:45 AM BREAKOUT SESSIONS (choose one – all morning sessions will also be offered in the afternoon)**
- **Business & Finance Office Matters**
Discussion of the Best Practices document, the role played by the Internal Auditors, Pastors, Principals, Business Managers, and Parish Finance Councils. Discuss ideas about the direction we are heading with internal controls, reports and shared responsibilities among these various parties.
 - Michael Warren, *Controller*
 - **Parish IQ and a sneak peek of Notify Now**
“Feel like you need a PHD to get the answers you want from your database?”
 - Learn how to write your own query – WITHOUT having to learn advanced applications
 - Eliminate the waiting time to get the answers you need – working weekends and need to get answers? Technical Support is taking messages and will call you back? Or maybe the one staff person you rely on to write your Access queries – the database ‘guru’ - is on vacation? No problem! With the simplicity of the Parish IQ intuitive interface, all users can choose from available fields that are used in every day work.
 - Catch a sneak peek at the ease of mass communication capabilities via email, text and voice messaging with Notify Now – a product that is integrated with ParishSOFT in version 3.7.11 and higher.
 - Frank Whiting, *ParishSOFT Training Specialist*
 - **Logos: In Depth Report Writing**
Learn how to create custom financial reports using Logos User Financial Reports
 - Patrick Warner, *PIS Manager*
 - **HRiPortal, Policies & Procedures**
We will cover the most common questions and frequent issues that arise regarding the HRiPortal, Human Resource and Safe Environment Policies in a fun and interactive format.
 - Chandler Richburg, *HRiPortal Support*
 - Stephanie Landrum, *Volunteer Coordinator*
 - Chaundra Louard, *HR Specialist*

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12:10 PM LUNCH

1:00 PM GENERAL SESSION: PARISH RECORDS & RECORDKEEPING

It is time to think about bringing order to the chaos that surrounds you at work in terms of parish records. True, there seems to never be enough time to organize records and they never go away on their own! What a relief when you do address the accumulation of paper and digital files. There are tools to help sort out the mess so you can finally have a clean office and a clear mind! Carolyn will discuss the necessity for managing records and how to do it by using archdiocesan policies and procedures.

- Carolyn Denton, *Director of Archives and Records*

2:00 PM BREAK

2:15 PM BREAKOUT SESSIONS (*choose one – see morning sessions descriptions if not listed*)

- **Business & Finance Office Matters**
- **Parish IQ and a sneak peek of Notify Now**
- **Logos: In Depth Report Writing**
- **HRiPortal, Policies & Procedures**
- **ParishSOFT Enrichment Breakout**

Discuss how to record sacramental data in ParishSOFT using archdiocesan policies and procedures. Learn how to add non US parishes to your Online Catholic Directory and how to use Milestones to help you keep track of required tasks or assignments such as service hours or completion of the You Matter program. Talk about the importance of proper grade coding in the Religious Education module when building your school year.

- Shannon Wiggins, *Training Coordinator*

3:30 PM FINAL REMARKS & CLOSING PRAYER

We would like to thank Father Darragh Griffith, pastor of Holy Family Catholic Church and all the clergy and staff for their warm hospitality.