

# 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](mailto: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](mailto: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.**

Group Name: Status Animarum - Households  
Category: Status

Show Results as:  Individuals  Families  Include Disabled Records

Filter Search Fields By: Show Family Fields

Add Criteria: Repeat steps 1-4 as needed to build the group

1. Select a field to search 2. Select how to search 3. Enter the item to search for

Field	How to Search	Value	And/Or
Member Status	Equal to	Active Member	OR
Member Status	Equal to	Active-not use envelopes	OR
Member Status	Equal to	In-Active	OR
Member Status	Equal to	Nursing Home Resident	OR
Member Status	Equal to	On-line Giving	OR
Member Status	Equal to	On-line Giving - no envel...	)

Group Criteria | Sharing | Description

Directory Name  
Address  
Zip Code  
Type of Household  
Member Status

Save Close

Smart Groups | Display Group

Close | Select Fields | Refresh Result | SK Communications | Email Group | Print Group | Group Reports | Advanced Options | Send Email | Call | SK Communications | View Map | Quick Print | Schedule Appointment

Save As | Edit Group | Smart Groups

Households | Tagged: 885 | Untagged: 0 | Total: 885

Enter text to search: Find Clear

Drag a column header here to group by that column

Tag	Directory Name	Address	Zip Code	Type of Household
<input checked="" type="checkbox"/>	Abbott, Mark & Marilyn	3648 Hartford	63116	Catholic
<input checked="" type="checkbox"/>	Abrajano, Todd & Melanie	335 Cherry Hills Meadow Dr	63040-2118	Catholic
<input checked="" type="checkbox"/>	Ackerman, Alyssa	4059 Blaine Ave	63110-4024	Catholic
<input checked="" type="checkbox"/>	Adelman-Adler, Chris	1 Shaw Pl	63110-3724	Mixed
<input checked="" type="checkbox"/>	Adelson, Scott & Heather	1214 Missouri Ave	63104	Catholic
<input checked="" type="checkbox"/>	Agniel, Sean and Susie	3407 Wyoming St	63118-2018	Catholic

**COMPARE THE RESULTS TO LAST YEAR'S FIGURES. If there is any question that the figures are not accurate contact Parish Support: Shelley Lang at 314-792-7072, Michele Fisher at 314-792-7829 or Sally Serbus at 314-792-7716.**

❖ **2. 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.

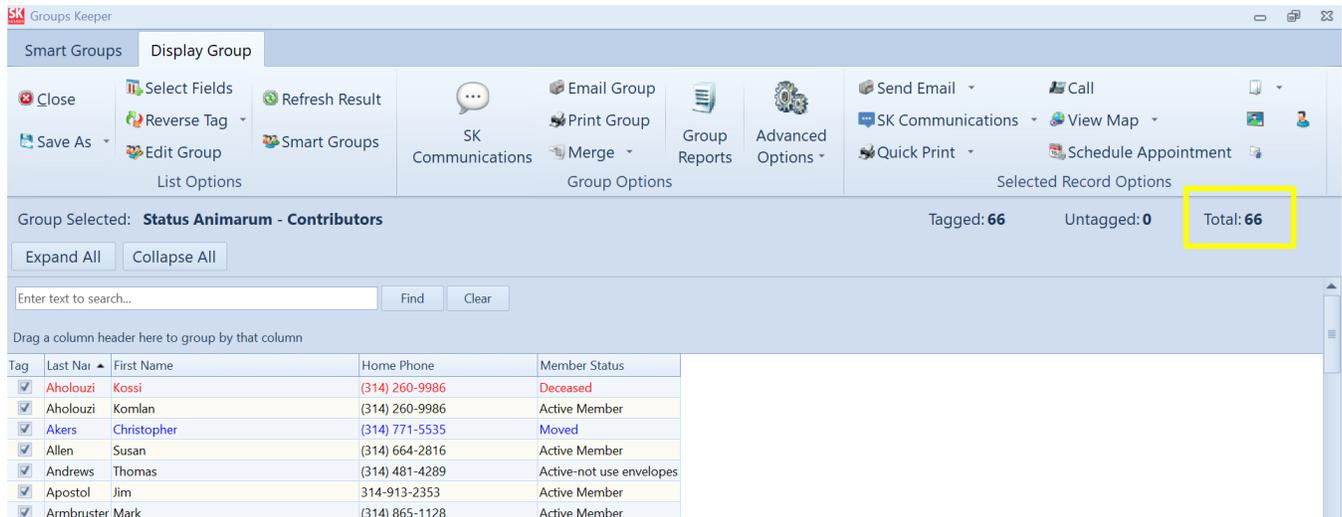
- Click on the “Groups Keeper” button.
- Click on “Add Group” – a new group window will open.
  - In the “Enter a name for the group” field enter “Status Animarum – Contributors.”
  - In the “List Search results using” field click on Individual
  - In the “Choose Search Field from;” field select “Show 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.

### Sample query for Contributors

The screenshot shows the 'Add/Edit Group' window with the following details:

- Group Name:** Status Animarum - Contributors
- Category:** Status
- Show Results as:** Individuals (selected), Families, Include Disabled Records (checked)
- Filter Search Fields By:** Show Contribution Fields
- Add Criteria:** Repeat steps 1-4 as needed to build the group
- 1. Select a field to search:** Contribution
- 2. Select how to search:** Equal to
- 3. Enter the item to search for:** General Fund
- Contribution Date:** Between 07/01/2023 and 06/30/2024
- Total Gift:** Greater than \$0.00
- Group Criteria Table:**

(	Field	How to Search	Value	)	And/...
(	Contribution	Equal to	General Fund and date b	)	And/...
- Buttons:** Add Criteria, Copy Line, Delete Line, Delete All, Move Line (up/down), Select Fields, Save, Close



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- ❖ **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

(	Field	How to Search	Value	)	And/Or
(	Member Status	Equal to	Active Member	)	OR
	Member Status	Equal to	Active-not use envelopes	)	OR
	Member Status	Equal to	In-Active	)	OR
	Member Status	Equal to	Nursing Home Resident	)	OR
	Member Status	Equal to	On-line Giving	)	OR
	Member Status	Equal to	On-line Giving - no envelo...	)	AND
	Religion	Equal to	Catholic	)	

Group Selected: **Status Animarum - Catholics** Tagged: **1758** Untagged: **0** **Total: 1758**

Enter text to search... Find Clear

Drag a column header here to group by that column

Tag	Last Name	First Name	Address	City	State	Zip Code	Gender	Birth Date	Relationship
<input checked="" type="checkbox"/>	Ackerman	Alyssa	4059 Blaine Ave	Saint Louis	MO	63110-4024	Female	01/01/1996	Head of Household
<input checked="" type="checkbox"/>	Adelman	Daniel	1 Shaw Pl	Saint Louis	MO	63110-3724	Male	11/14/1978	Adult Child
<input checked="" type="checkbox"/>	Adelman	John	1 Shaw Pl	Saint Louis	MO	63110-3724	Male	12/22/1981	Adult Child
<input checked="" type="checkbox"/>	Adelman-Adler	Christelle	1 Shaw Pl	Saint Louis	MO	63110-3724	Female	09/09/1947	Head of Household
<input checked="" type="checkbox"/>	Aholouzi	Ami	2953 Thomas St	Saint Louis	MO	63106-1514	Female	02/02/1970	Head of Household
<input checked="" type="checkbox"/>	Aholouzi	Akouvi	2953 Thomas St	Saint Louis	MO	63106-1514	Female	01/01/1992	Adult Child
<input checked="" type="checkbox"/>	Aholouzi	Komlan	2953 Thomas St	Saint Louis	MO	63106-1514	Male	03/01/1997	Adult Child
<input checked="" type="checkbox"/>	Albrecht	Rebecca	324 Clarendon Ln	St. Charles	MO	63301	Female		Head of Household
<input checked="" type="checkbox"/>	Albright	Rochelle	4003 Russell Blvd	Saint Louis	MO	63110-3609	Female	06/16/1984	Head of Household
<input checked="" type="checkbox"/>	Albright	Ace	4003 Russell Blvd	Saint Louis	MO	63110-3609	Male	02/08/2011	Son

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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”

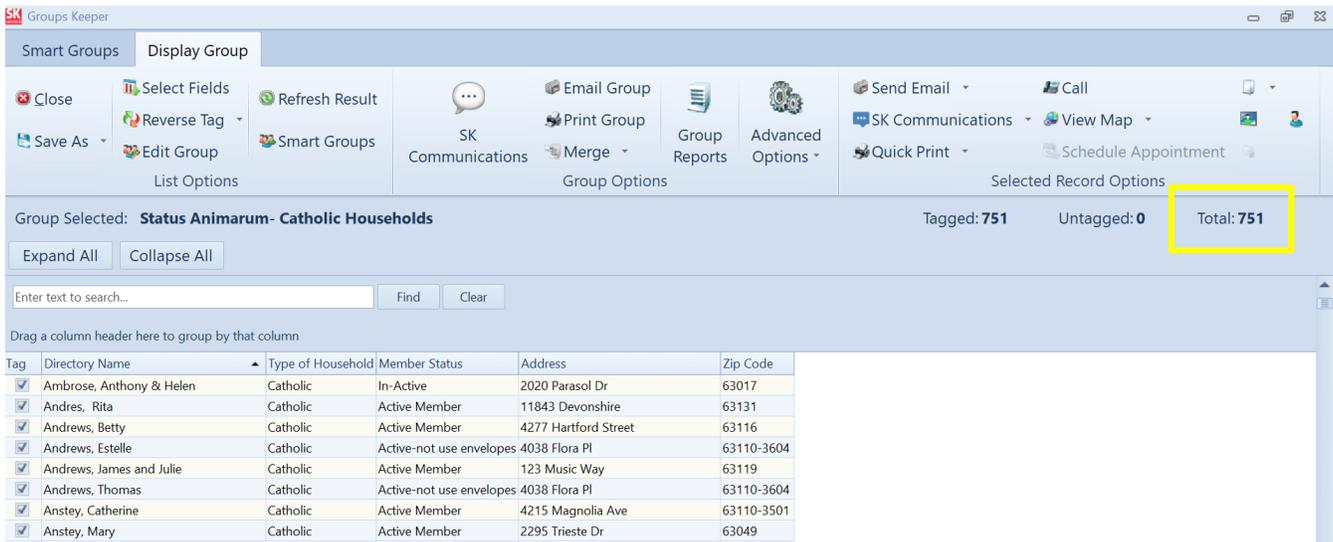
- You will see the following message - “You are about to copy the selected group. Are you sure you want to do this?” Click on “Copy”
- A new group opens.
  - In the “Enter a name for the group” field enter “Status Animarum – Type of Households - Catholics.”
  - In the “List Search results using” field 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

The screenshot shows the 'Add/Edit Group' window with the following details:

- Group Name:** Status Animarum- Catholic Households
- Category:** Status
- Show Results as:** Families (selected)
- Filter Search Fields By:** Show Family Fields
- Add Criteria:** Repeat steps 1-4 as needed to build the group
- Criteria Table:**

(	Field	How to Search	Value	)	And/Or
(	Member Status	Equal to	Active Member	)	OR
	Member Status	Equal to	Active-not use envelopes	)	OR
	Member Status	Equal to	In-Active	)	OR
	Member Status	Equal to	Nursing Home Resident	)	OR
	Member Status	Equal to	On-line Giving	)	OR
	Member Status	Equal to	On-line Giving - no envelo...	)	AND
	Type of Household	Equal to	Catholic	)	
- Right Panel:** Copy Line, Delete Line, Delete All, Move Line (down), Move Line (up), Select Fields
- Select Fields List:** Directory Name, Type of Household, Member Status, Address, Zip Code
- Buttons:** Save, Close



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- ❖ **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

Tag	Mailing Name	Member Status	Type of Household
<input checked="" type="checkbox"/>	Dr. & Mrs. Barry Hendrickson	Active Member	Mixed
<input checked="" type="checkbox"/>	Dr. & Mrs. Geoffrey Hill	Active Member	Mixed
<input checked="" type="checkbox"/>	Dr. & Mrs. Gina Clemens	In-Active	Mixed
<input checked="" type="checkbox"/>	Dr. K.J Hippensteel & Dr. Rachel Hippensteel	Active Member	Mixed
<input checked="" type="checkbox"/>	Dr. Lisa Dorne & Mr. Christopher Meyer	Active Member	Mixed
<input checked="" type="checkbox"/>	Mr. Rick McKenna & Ms. Norma West	Active Member	Mixed

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

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