

It's Time to Focus on Your Roster!

Our goal at Lifetouch is to ensure your current photography event and directory program exceeds your expectations and runs seamlessly! Serving photographic needs since 1936 and directory needs since 1963, we've learned a lot.

The following information will help you get a jump start on preparing and submitting your organization's roster in a timely manner, avoiding delays and pitfalls. **Please provide this information to the Secretary of your organization as well as the individual responsible for submitting the materials for the layout of your directory.**

How to Proof, Scrub and Purge Your Roster

It is critical to the success of your program to update the accuracy of the roster *prior to* sending it to the phone callers for appointment setting or with the layout materials for printing. Purging and proofing your roster on the front end of your program will dramatically reduce the possibility of delays and massive corrections being made on the back end. Consider the following tip to accomplish this goal:

Print a current copy of your roster and post it on the wall near where the photography appointment sign-ups will be taking place. Attach a red pencil on a string by the posted roster. Announce to your members verbally or in the bulletin, "Please check your entry on the roster posted in the hallway." "You'll find a red pencil on a string by it." "Please make any corrections or changes to your entry...otherwise, that is how your entry will appear in the new directory."

Members will gladly proof and correct any errors appearing in their own entry. For example, Cathy spells her name with a, "K" not a, "C."

Keep the roster posted for at least 3 weeks. At the conclusion, remove the altered sheets and provide them to the secretary to make the noted changes to the master roster. Organizations have found that engaging members to assist in correcting roster entries is the most efficient way to accomplish the task!

How to Prepare Your (Newly Purged) Roster

Roster Heading

The roster heading will appear on the top of the first page of the directory roster. Suggested information includes the name of your organization, address, phone number and e-mail address and date. You may submit up to five lines of heading information on a *Captions & Headlines* form. If your organization does not submit this information, Lifetouch will generate the heading to the best of our ability.

Example of a standard heading to appear on the top of the first roster page:

Organization Name & Directory Date (Year)

1600 Anywhere Street

Anywhere City, State/Province, Zip/Postal Code

Phone Number, Website, E-mail Address

Standard Roster Information Includes the Following Lines of Text:

- Telephone number (We recommend 10 digits, as area codes are now commonly required to dial even local numbers. Phone numbers will appear in bold type in your roster.)
- Parent's last name, parent's first name(s), semicolon, children's names (Last name will appear in bold type in your roster.)
- Street address
- City, State/Province, ZIP/Postal Code
- E-mail address

Any change to the sequence of items or format will result in a custom roster and you will incur an additional charge.

Use one of these three acceptable formats in which to submit your roster:

1. Member Record Data Format, LCD Transaction Format:

- If you use Shelby Systems, PowerChurch, Parish Data Systems, ACS or RDS as your church management software (CMS), the software supports this export format on disc. This format makes export and import easier and more reliable. Contact your CMS provider or see your CMS tool manual for export and import instructions.
- If a special character or additional information is included in the body of the roster, be sure to include a short explanation as a footnote. Example: *Indicates member. (Please use a separate sheet of paper for this purpose.) Please be aware that adding this character in the front of names and records could cause sort problems.

2. Member Record Data Format, Fielded Data:

- Your organization can submit your roster on disc in an Excel format. Use the tab key to move across the rows. The example below illustrates what your Excel file should look like. The columns should be in this order. A semi-colon separates the parents' (or parent's) name from the children's names. A comma is used to separate individual children's names one from another.

Telephone Number	Parents Last Name, Parent's First Name(s), semicolon, children's names	Street Address	City, State/Province, Zip Code/Postal Code	Email Address
216-949-8642	Olson, Duane	4530 Willow St.	Hesperia, CA 02345	dolson@aol.com
823-9651	Norris, Fred & Karen; Josh Ellis, Jeff	2033 Yucca Loma Rd.	Apple Valley, CA 92307-2033	

Note: Additional fields could be added to the roster for an additional charge.

3. Member Record Data Format, Plain Text:

- If you do not have Excel, submit your roster using your word processor in MS Word, MS Access, MS Works or Notepad. Example of how to type your roster on your disc: (SUBMIT IN A SINGLE COLUMN FORMAT).

Example 1— Single Member

216-949-8642
 Olson, Duane
 4530 Willow St.
 Hesperia, CA 02345
dolson@aol.com

Example 2 — Family

823-9651
 Norris, Fred & Karen; Josh Ellis, Jeff
 2033 Yucca Loma Rd.
 Apple Valley, CA 92307-2033

Submitting Your Roster

Rosters will only be accepted on a data storage device (disc, CD-ROM, thumb drive). The roster is formatted only from the information provided to us by the organization. It will not be retyped. Please follow the directions on the following pages for submitting a Roster on a disc. If you cannot submit a disc, please call our office. While we make an honest effort to print your roster as accurately as possible, we CANNOT guarantee that the proof will be error free. Even submission of a roster on a disc does not mean roster will be error free, so please keep this in mind when you receive your proof book.

General Information

If you use Shelby Systems, PowerChurch, Parish Data Systems, ACS or RDS as your church management software (CMS), the software supports this export format on disc. This format makes export and import easier and more reliable. Contact your CMS provider or see your CMS tool manual for export and import instructions.

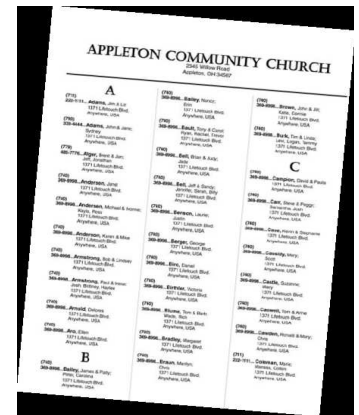
- A standard roster includes only the roster information in the order shown as stated above.
- You may include everyone on your roster even if they were not photographed.
- **Verify and update all phone numbers, E-mails, names and addresses prior to submitting your roster.**
- **Additions and updates after submission could result in additional charges.**
- Your roster will be printed based on the data (spelling, punctuation) we receive. However, the format (capitalization, bold) will convert to our standard format. See below for printed example. Note that the phone numbers and last names are in bold, upper and lower case as shown.
- You may add lines such as work phone numbers to your roster at an additional cost. These lines will appear after the standard roster information. (See Submission Form for cost information.)
- **If you rearrange the standard sequence of the information or want special formatting in the roster, it becomes a custom roster incurring an additional charge. Contact your Lifetouch representative for custom roster pricing.**
- If we cannot process your roster, we will contact you with an explanation of corrections needed. Your directory delivery date may be adjusted due to the processing delay
- If you find that you are encountering problems extracting the information from your membership database, we recommend you contact the technical support related to your program for further assistance. Please have a copy of our roster instructions available when calling your technical support.

Roster Format

Submitting a Roster on Disc/CD/Thumb Drive

IMPORTANT!

Verify and update all phone numbers, E-mails, names and addresses prior to submitting your roster. We recommend having an additional person at the church proof the roster before it is submitted.



Example of how your roster will appear in your printed directory:

Changes, additions and updates to the roster after it is submitted could result in additional charges, multiple proofs or delays.

- Acceptable submission media includes: disc, CD-ROM or thumb drive.
- The most effective file type is an ASCII or text file (ACS, RDS, PowerChurch or Shelby Systems), followed by the two methods described earlier. ASCII or text files can be created by most word processing, spreadsheet and database applications.
- Check your software manual (CMS manual) for instructions.
- Other acceptable applications are MS Excel, MS Word, MS Works, Notepad and MS Access. We do not directly support other word processing, spreadsheet or database applications.
- If you have any questions concerning your roster, please call 1-866-739-0317 in the U.S. and 1-800-553-8430 in Canada; fax 1-419-468-2741

Shipping Instructions

- Place your disc/CD of your roster in a *Page Envelope* and complete the Roster Section information.

Be sure you keep a copy of what you included in the envelope.

- All directory materials should be sent to Lifetouch at the same time in the large pre-addressed mailing envelope provided. (Recommended: Send USPS, Fedex, or UPS methods providing you a tracking number.)

Note: If roster cannot be submitted on disc, CD-ROM, or thumb drive, please contact our office for further instructions.

Roster Preparation Questions and Answers

- Q. What if the family has no telephone or their phone number is unlisted? Do I skip a space, not type in a telephone number ... how should this be handled?**
- A. Type “unlisted”, or skip a space and go to the next family.
- Q. Not all of the children’s names will fit on one line. Should I put them on two lines?**
- A. Just type the names all on one line and let it wrap around to the next line.
- Q. My software program prints my roster in all capital letters, or the last name is in all capital letters. Can I leave it like this or do I have to retype everything?**
- A. We convert all capital letters to upper and lower case letters. See the Roster Format section for an example of how your printed roster will appear in your directory. If you want a format other than the one shown, this becomes a custom roster and you will incur an additional charge.
- Q. There are two adults living in the same household, but are not husband and wife. How do we list them?**
- A. Separate the two people’s names with a comma: John Doe, Jane Smith.
- Q. A family has children with different last names. Should each child’s last name be included in the roster listing?**
- A. Yes. List in the following manner: John Doe, Jane Smith, etc.
- Q. How should we indicate persons or families that aren’t members of our organization?**
- A. An asterisk, letter or keyboard symbol can be used to indicate non-members and explained using a footnote. Place the asterisk, letter or other symbol after the name - NOT BEFORE THE NAME. If the symbol is placed before the name, our software will place it out of context.
- Q. Why do I have to put in semi-colons and commas when typing the roster?**
- A. The semi-colon separates the parents’ (or parent’s) names from the children’s names. The comma is used to separate the individual children’s names from one another.

Questions and Answers, *Continued*

Q. Can work telephone numbers, winter telephone numbers, and multiple addresses be included in our roster listings?

A. Yes, but there is a charge for adding any information not specifically listed in the roster preparation instructions. If you are submitting this type of additional information, it should be typed on the line after the zip code. (See the Submission Form for exact costs.)

Q. How do I save my roster on disk?

A. Most software programs allow you to open your file and click on "File, Save As." The next screen should allow you to choose the drive where you wish to save your file. One of your drives should be for saving to a disk - this is usually the **A** drive. Some programs do not allow a "Save As". Instead they allow you to export the information to a disc/CD, either when the report is created asking if you want to send a file or disk, or under a utility to export the data.

Q. Can we submit our roster information on the same disc/CD/thumb drive as our activity pages?

A. No, please submit your roster separate from your activity pages. Lifetouch processes these two parts of your directory separately.

Q. Should we update our roster information before we submit our roster to Lifetouch?

A. Yes, please verify and update all phone numbers, E-mails, names and addresses prior to submitting your roster. Additions and updates after submission of your roster could result in additional charges.

Verification/Help

A fax showing one page of a roster may be sent to “Attn: Roster Dept.” at 419-462-5688 with questions or for approval. The customer contact name and a telephone number should be included on the fax cover sheet.

For additional questions please call the Lifetouch Center of Excellence at 1-866-739-0317 in the U.S. or 1-800-553-8430 in Canada.