

# CAMINO CONNECTION...

Audience: Produced for parishes in the Diocese of Covington

Issue: July 2024

Topic: Household Info and Snapshot Reports

## Household Info and Snapshot Report Documents

There are 2 documents in Camino which will allow you to print information about specific households. These documents format a household's data into a formatted style for easier reading for yourself, for your pastor or for the parishioner to review and update.

The Household Info Report gives you contact and demographic information about a household which includes all members, their status in the parish, and their sacramental information. This report can be used to see what household information and member information is stored in Camino and what is missing. Parishes can use this report to ask parishioners to "Fill in the Blanks" so the parish can update their records. It consists of 3 pages with the 3<sup>rd</sup> page being one with questions pertaining to the parishioners' activities in the parish.

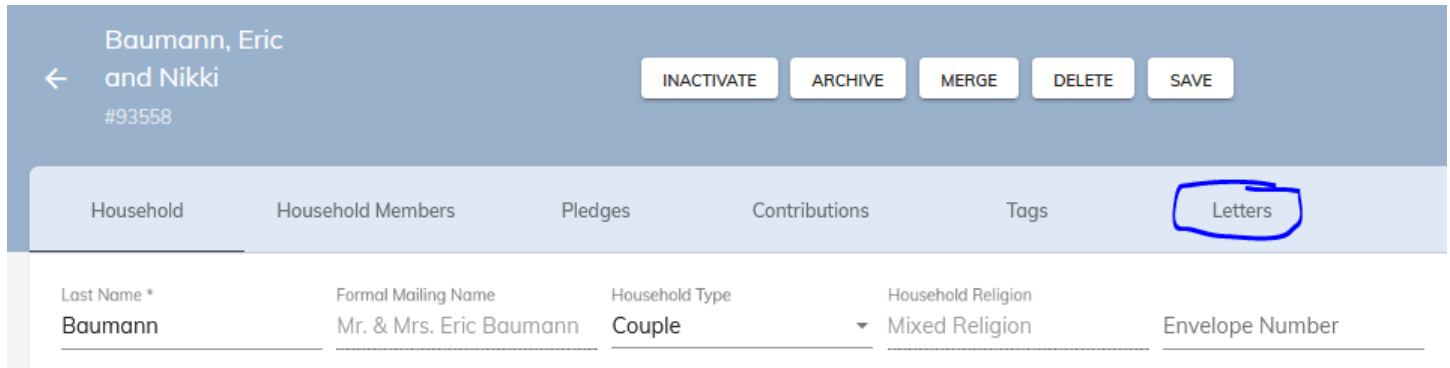
The Household Snapshot Report gives you most of the same contact and demographic information about a household but on one page instead of 3. This report does not include sacramental information or additional questions at the end. It may be useful for your pastor to view information about a new household or if you have a new pastor who may want to know more about individual households in your parish.

These documents are stored in System Documents as global reports in Camino but can be customized for your parish if there are parts of the report you would like to change. Contact Linda Dietz if you would like to customize either of these reports for your parish.

Let's take a look at how to run these reports from either the Household screen or the Reports section of Camino.

You can access either report from the Household screen for a household by following these steps:

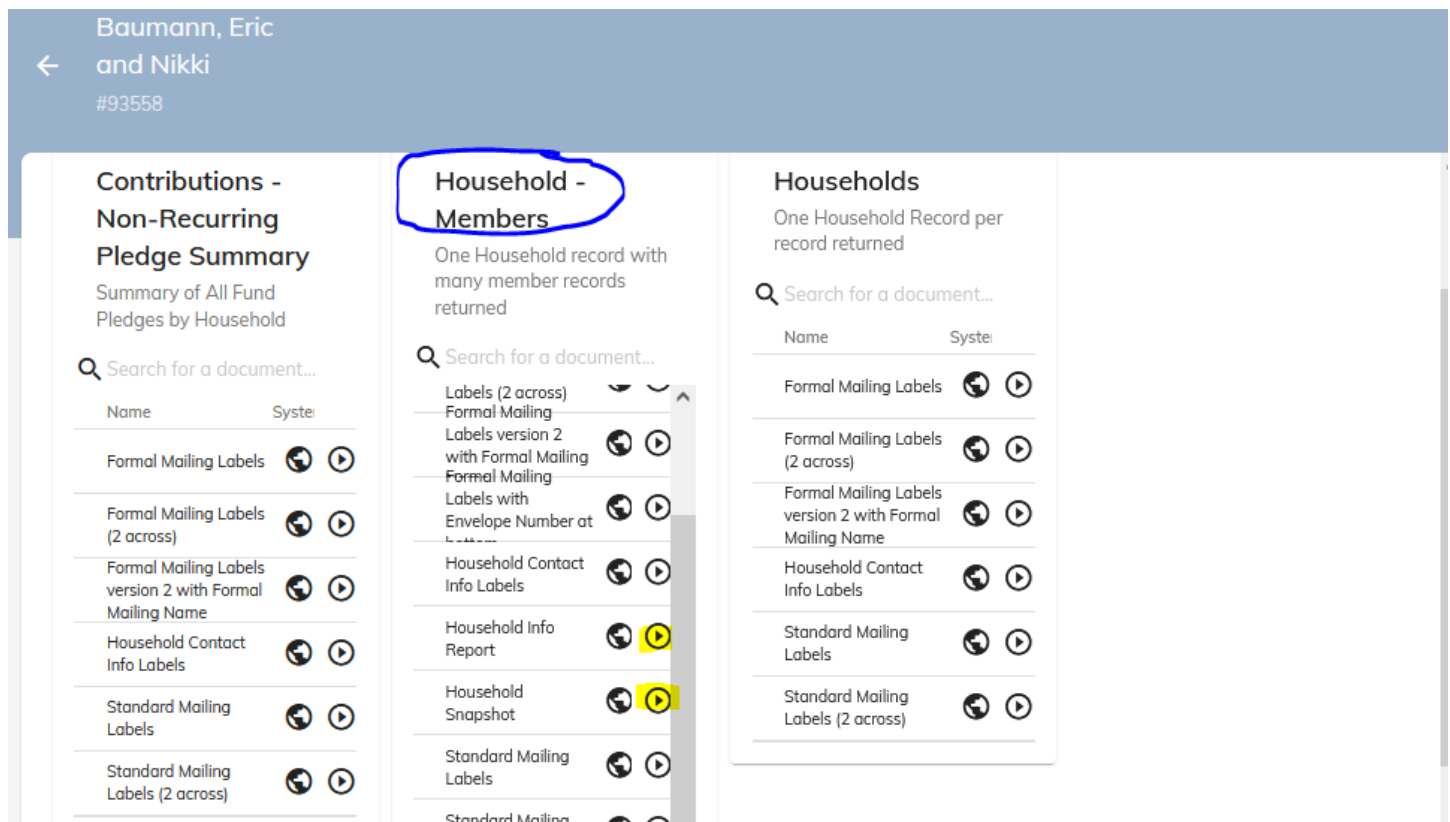
1. Once in a household, Click “Letters” (other documents besides letters are stored here).



2. Once on the Letters screen, Click the generate button (the icon with an arrow inside the circle) for the report you want to create whether it is the Household Info Report or the Household Snapshot Report. These reports will be listed under the Household – Members section of report categories (since it is pulling information from the Household and the Members section of Camino).

The report will be generated for you and stored in your Downloads. It will be stored as a word document and can be opened, viewed, printed, saved elsewhere and even edited.

Try running each of these for the same household so you can see the difference between the 2 reports.



## Would you like to create the report for more than 1 household at one time?

If **yes**, you can do this by going to the Reports section of Camino. Here you will go into a report query and create the report for whichever households match the criteria filters you are using. The example we will use below has the criterial filters set to Active Parish Household.

Remember this could be a very large document depending on how many Active Parish Households you have at your parish. However, some parishes have found the report useful when canvassing their Active Parish household to update their information (especially true for the Household Info Report).

The steps to follow are below:

1. Search for the “XXTRA – Household Info Report”. This report is currently set to create a report for each Active Parish Household. See the following criteria filters used:

XXTRA - Household Info Report  
Created by: Dietz, Linda

COPY REPORT DELETE REPORT SAVE

Access Level \*  
Everyone

Selected Fields

And Or Add Filter Add Sub-Filter

Active equal to Yes

Parish Household equal to Yes

Order By

2. At this point, Click Documents:

XXTRA - Household Info Report  
Created by: Dietz, Linda

COPY REPORT DELETE REPORT SAVE

Query Preview **Documents** Tagging Fields

Report Type  
Household - Members

Report Name \*  
XXTRA - Household Info F

Description  
Lists contact info for Household and Members including sa

Search for a field...

Field

Remove duplicates Use Cache

Access Level \*

3. Then Click System Documents. You will see the 2 reports stored here. Choose whichever one you want to create. The report will be generated for you and stored in your Downloads. It will be stored as a word document and can be opened, viewed, printed, saved elsewhere and even edited.

Keep in mind that this could be a rather larger document depending on how many Active Parish Households you have.

The screenshot shows a software interface for generating reports. At the top, it says 'XXTRA - Household Info Report' and 'Created by: Dietz, Linda'. Below this is a navigation bar with tabs: Query, Preview, Email, Documents, Tagging, and Fields. The 'Documents' tab is active, showing a list of documents under the 'System Documents' sub-tab. A search bar is present with the text 'Search for a document...'. The document list has columns for 'Last Modified', 'Type', and 'Name'. Two documents are circled in blue: 'Household Snapshot' (dated 7/23/24, 9:08 AM, Household type) and 'Household Info Report' (dated 7/14/23, 12:15 PM, Household type). Each document row includes edit, download, and refresh icons.

Last Modified	Type	Name	Actions
7/23/24, 9:08 AM	Household	Household Snapshot	✎ ⬇️ ⏪
11/27/23, 4:11 PM	Mailing Labels	Formal Mailing Labels with Envelope Number at bottom	✎ ⬇️ ⏪
9/22/23, 3:55 PM	Household	Household Contact Info Labels	✎ ⬇️ ⏪
7/14/23, 12:15 PM	Household	Household Info Report	✎ ⬇️ ⏪
8/11/22, 1:22 PM	Mailing Labels	Formal Mailing Labels version 2 with Formal Mailing Name	✎ ⬇️ ⏪

*Thank you for reading the Camino Connection...*

*Call or email Linda Dietz at 859-392-1563 [ldietz@covdio.org](mailto:ldietz@covdio.org) if you need help exploring this feature.*