Parish Data System
a division of ACS Technologies.

Training Documentation

PDS Formation Office

We are here for you.

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PDS Formation Office

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Contents

1: About Families

The Families windows display information about a family, such as status, individual member names, addresses, pictures, and financial activity. You can add new families to the program here. To access family information, on the Information tab, click **Families**.

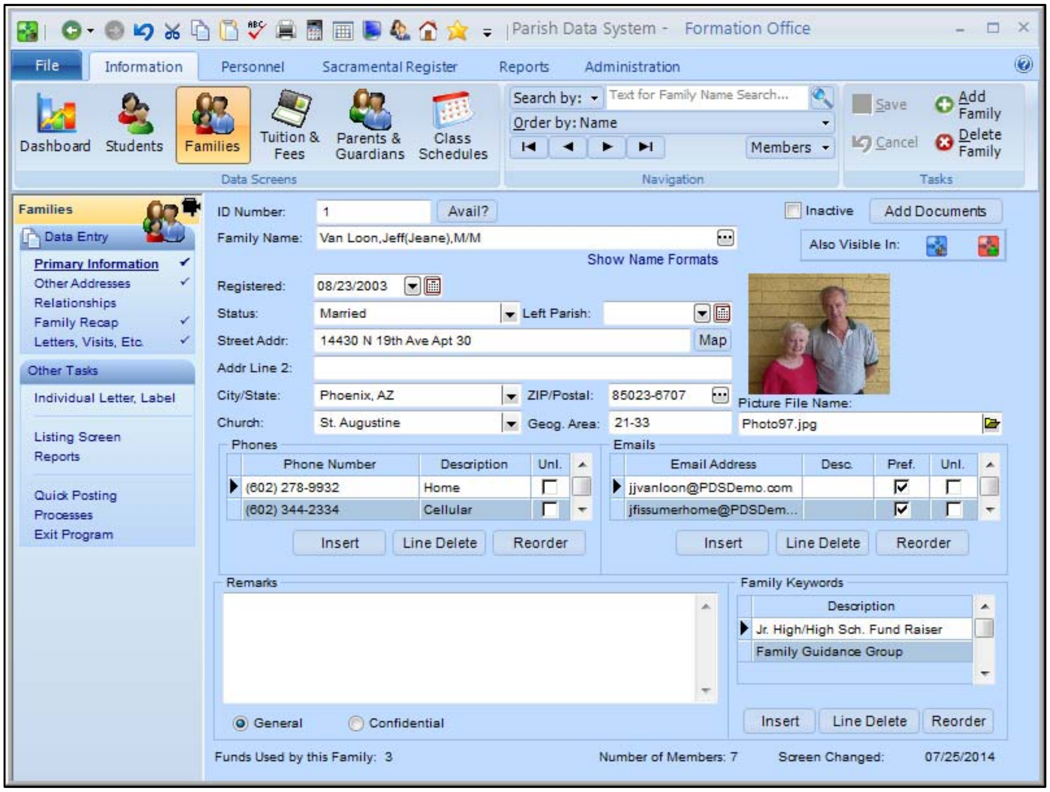


Fig. 1-1.

Family Fields that are Always Visible

As you access the different sections of the Families window, the following fields remain visible at the top of the window:

ID Number

If required, each family must have a unique ID number. To view available ID numbers, click **Avail?** It is not recommended that you use leading zeros, symbols, or letters of the alphabet in the family ID.

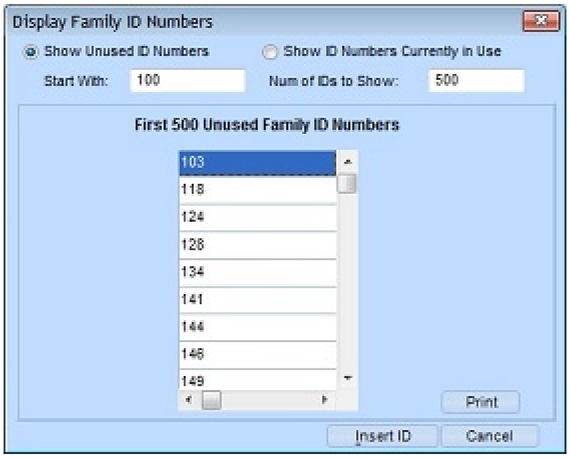


Fig. 1-2.

To configure the use of IDs in the program, on the File menu, click **Setup > ID Number Options**.

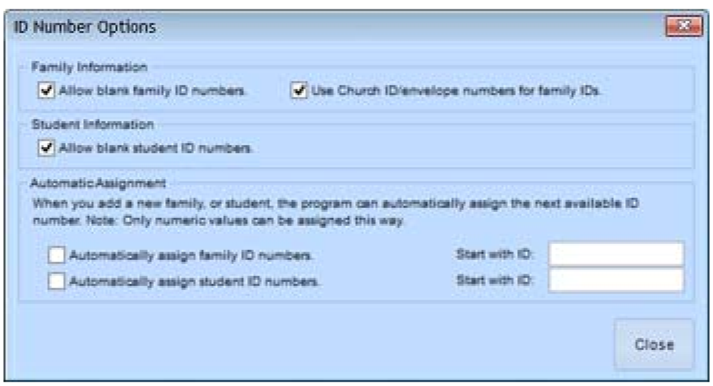


Fig. 1-3.

If you share data with Church Office, you can select to use the Church ID/Envelope numbers for family IDs. If you select this option, then the ID/Envelope number for the family record in Church Office is shared with the ID number for the family record in Formation. So any changes to the ID numbers will affect both programs. If you clear this option, each program maintains its own set of ID numbers.

Family Name

Build the family name in the Family Name dialog box. At the end of the **Family Name** field, click .

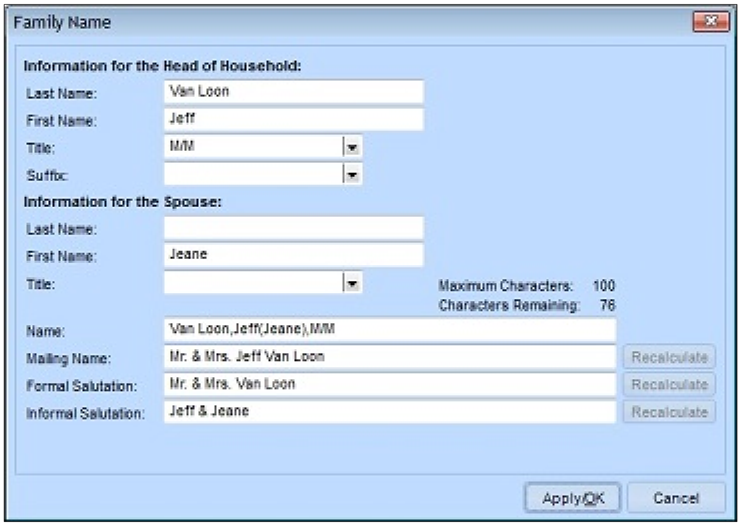


Fig. 1-4.

As you enter the different parts of the name, the program fills in the mailing name and salutations. When you add a family, this dialog box has check boxes next to the Head and Spouse names. Select these check boxes to automatically add member records for the Head and Spouse.

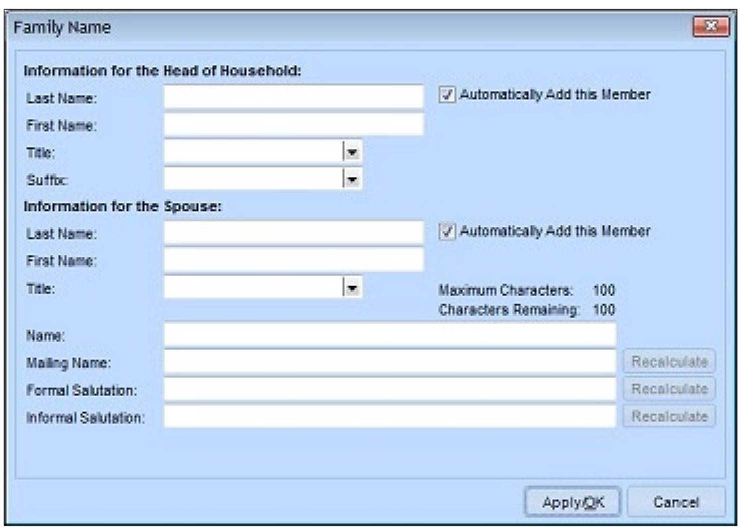


Fig. 1-5.

You can set up these check boxes to be selected by default. On the File menu, click **Setup > Initial Setup**. Select or clear the **Disable Add Head/Spouse when Add Family** option.

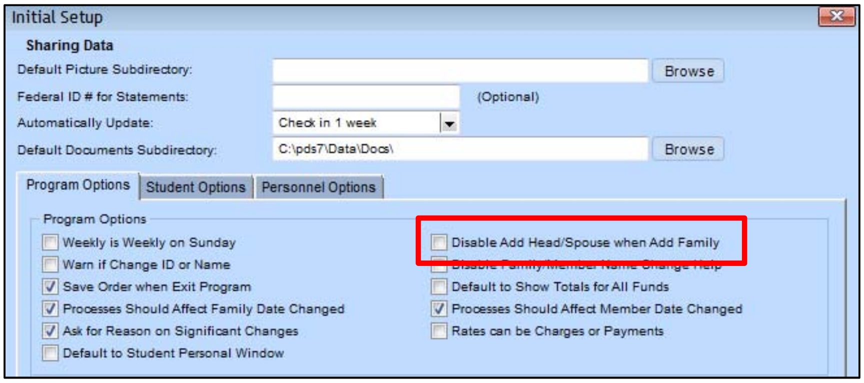


Fig. 1-6.

Also Visible In

If you share a database with another Office program, some families from that program may be visible in Formation Office. A blue icon indicates the family is also a Church Office family. A red icon indicates the family is also a School Office family. For more information about the different icons that can display here, see the Appendix chapter of this training guide.

Fig. 1-7.

Active/Inactive vs. Delete

To indicate that the family and all of its members are no longer active, select **Inactive**. Inactive families still display in the program and can be included in (or excluded from) reports. Depending on your organization's needs, you can define what "inactive" means and decide when to select this check box.

Useful Information

In a shared environment, each program maintains its own inactive flags unless you select to share inactive flags. In Church Office, on the File menu, click **Setup > Initial Setup**. In the **Share Data Options** section, select **Share Church Inactive Flags**. Then, in the Initial Setup window of Formation Office, select to use the shared fields.

To permanently remove a family from the program, locate the family's record, and in the **Tasks** group, click **Delete Family**. When you run reports, there is no option to include deleted families. If the family is used by any other program, it is hidden from view. However, if no other program uses the family record, you can either hide the family or permanently delete the family record. Once a family is permanently deleted, the only way to recover their information is to restore data from a backup or manually re-enter their information.

Entering Primary Information

In the Primary Information window, you can enter or view the family's address, email addresses, phone numbers, picture, family keywords, and remarks. To access this window, in the navigation pane, click **Primary Information**.

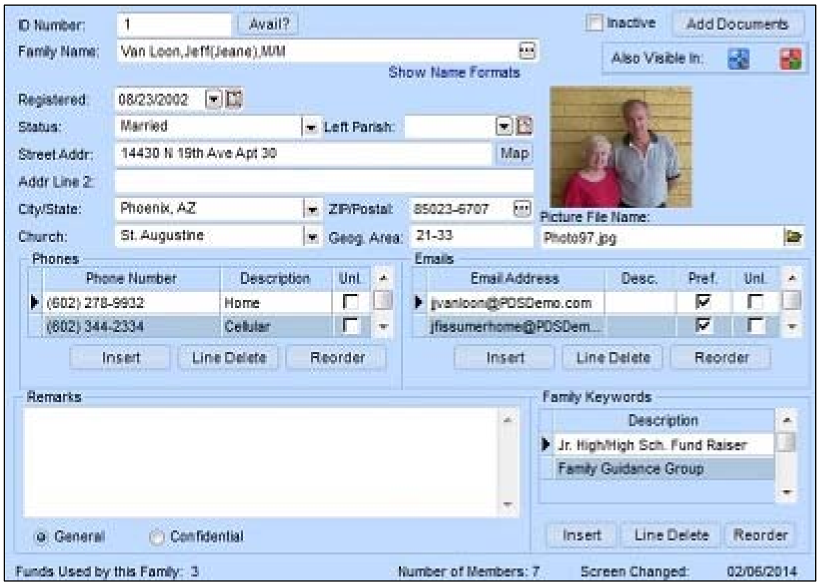


Fig. 1-8.

Status, **City/State**, **Phone Number Description**, and **Family Keywords** — These are all keyword fields. The program maintains multiple keyword lists for values you frequently enter. This helps avoid duplicate and inconsistent entries. You can access a keyword list by clicking **Manage** on any corresponding keyword drop-down list. For more information, see the Keywords chapter of this training guide.

Left Parish - When a family is no longer registered at your parish, enter the date they left, or click to select a date. When entering a Left Parish date, the program will prompt you to make the family inactive. Select **Yes** if you want to mark the family as Inactive. At the end of several date fields, there is a button you can use this to change the date format.

Fig. 1-9.

Map — At the end of most address fields, there is a Map button. To display a picture of the address location, click this button.

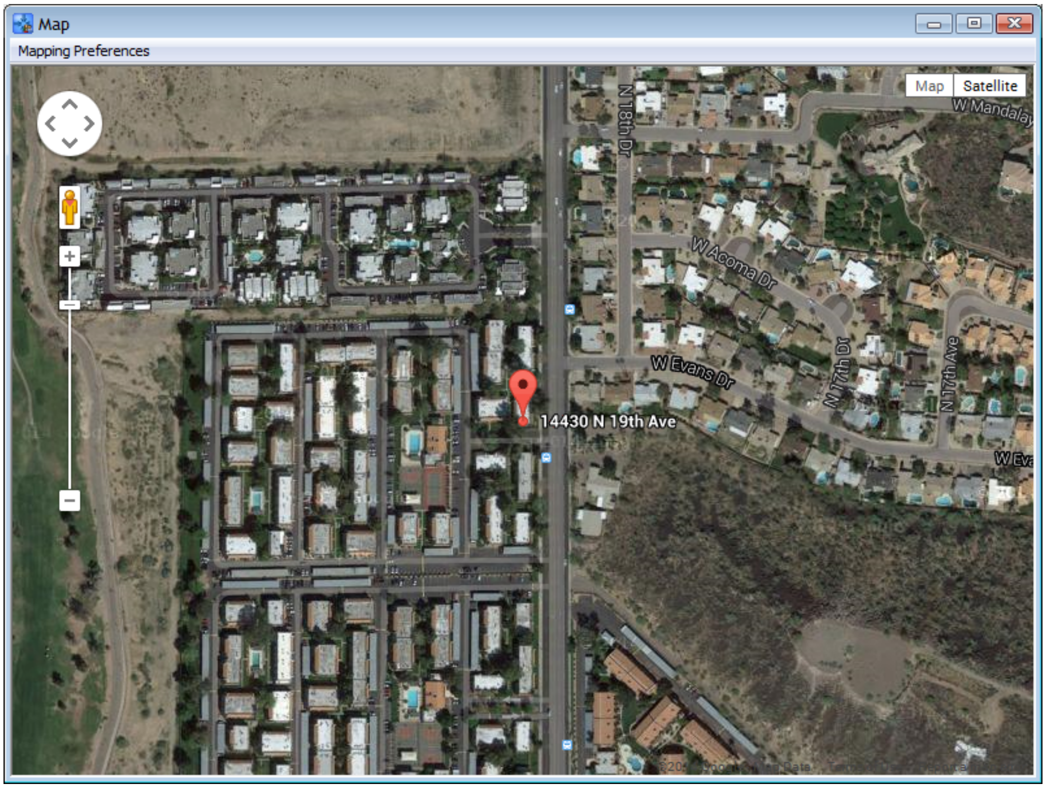


Fig. 1-10.

From the **Mapping Preferences** menu, you can select one of the following mapping services:

- Google
- Yahoo
- MapQuest
- Other

These mapping services require an active internet connection. The map that displays depends on the address entered in the program.

ZIP/Postal — At the end of most ZIP/Postal Code fields, there is an ellipsis button you can click to display additional information used by the EZ-Mail (bulk mailing feature). This extra information is not typically entered by hand, but rather imported by the CASSIt! Certification process. The **Longitude** and **Latitude** settings provide an alternative way of pinpointing an address location.

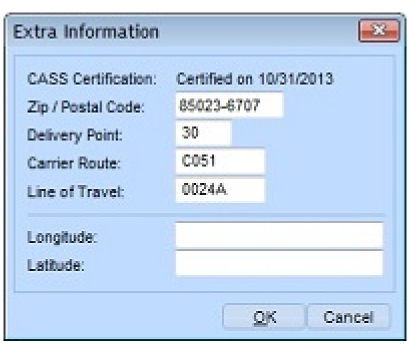


Fig. 1-11.

Geog. Area — Enter the geographic area. Use this field to group families by address. You can use any combination of numbers or you can leave this field blank.

If you use numbers and letters, entry must be consistent or it may seem as though families are not sorted correctly when you print reports sorted by area. If you use letters and numbers, with letters first, always enter the same number of letters and numbers. If the highest number has three digits, then all numbers must have three digits (ex. 001). Otherwise, 1 will process as 100. If you enter numbers first, it is not necessary to lead a single digit number with zero's.

Email — Enter the family's email address. You can add an unlimited number of email addresses and send an email to all listed email addresses at once. Select **Pref.** if the family prefers email instead of mail when possible, and select **Unl.** if you want the email address to be omitted from reports created for external use. Click to send an email to the selected email address using your default email application.

Phones — You can enter an unlimited number of phone numbers for each family. In this grid, enter the phone number, a description (such as Home or Office), and indicate if the number is unlisted. When you print reports, you can select to print unlisted numbers as XXX-XXXX. To maintain the list of phone numbers, use the **Insert**, **Line Delete**, and **Reorder** buttons.

Picture File Name — Enter the file path to the family's picture. To locate the path, click . Once you insert a picture, click the thumbnail to enlarge it.

Useful Information

To indicate where family pictures are located, on the File menu, click **Setup > Initial Setup**. For the **Default Picture Subdirectory**, enter the file path to your family pictures.

Remarks — Enter general or confidential remarks. You can password-protect confidential remarks, so that only authorized users can view them.

Family Keywords — You can add an unlimited number of keywords per family. Family keywords are used to identify a group of families with something in common, such as **Receives Newsletter**, **Founding Family**, or **School Family**. You can enter keywords "on the fly". If you enter a keyword that is not in the list, you can add it in this window if you have appropriate user rights. For more information about keywords, see the Keywords chapter of this training guide.

Entering Other Addresses

To enter or view the family's mailing address and alternate address information, in the navigation pane, click **Other Addresses**.

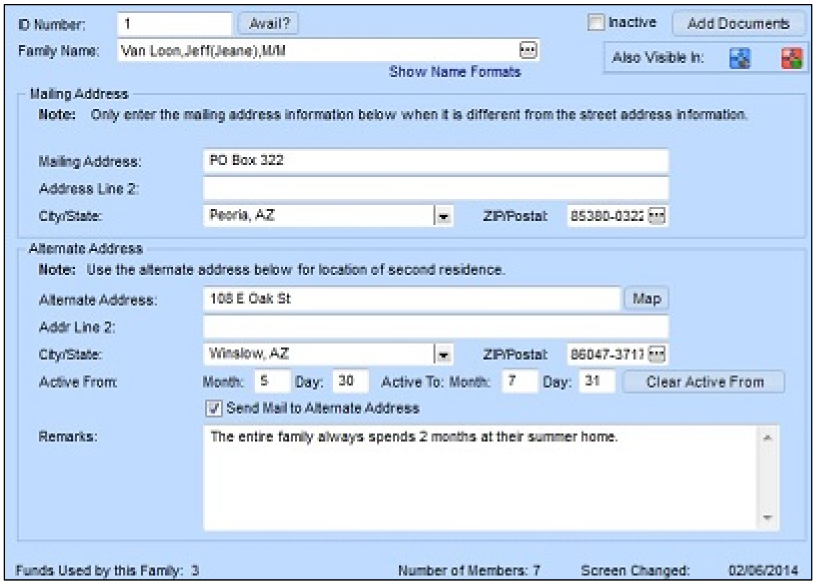


Fig. 1-12.

Mailing Address

If the family's mailing address is different than the street address, enter it in this window. For example, the family might have a P.O. box. If the mailing address is the same as the street address entered in the Primary Information window, leave this section blank.

When you run reports, the program looks here for a mailing address. If you leave this section blank, the program uses the street address entered in the Primary Information window.

Alternate Address

If the family has an alternate address, such as a vacation home, enter it here. Indicate the date range that this alternate address is used. You can also enter alternate email addresses here and select whether letters should be sent via email instead of mail.

Entering Relationships

For a family or members of a family, you can add any number of relationships with other members/families in your PDS Office database as well as with people outside of your parish.

You may want to add a relationship when there's someone outside of the family that you need to contact or send information to. For example, with divorced families, you may need to contact the birth parent or send them a letter regarding their child. Other examples include grandparents, godparents, emergency contacts, family friends, and doctors/dentists.

To add relationships, in the navigation pane, click **Relationships**.

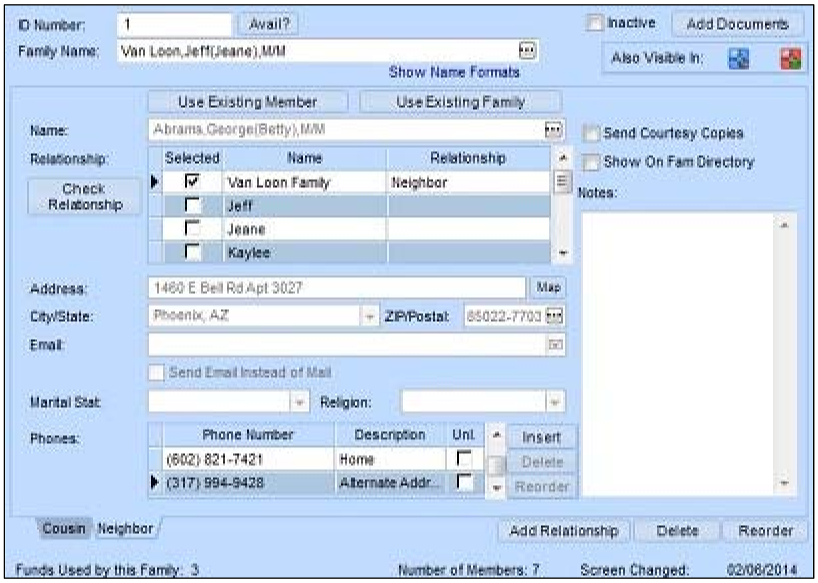


Fig. 1-13.

Useful Information

If you share data between your PDS Office programs, the relationship information you enter in Formation Office is automatically added in Church and School. Also, the drop-down list for members and families includes all visible data in your data file, so you can select records from Formation and School Office within your Church program.

To add a relationship with an existing member or family

1. Locate the record of the family you want to add a relationship for.
2. In the navigation pane, click **Relationships**.
3. Click **Use Existing Member** or **Use Existing Family**.
4. Select the member or family who has a relationship with the family.
5. In the grid, select the family member(s) the person has a relationship with, or select **[Name] Family** to create the relationship with the entire family.
6. In the **Relationship** and **Reciprocal Relationship** column, enter or select the relationship.

> **Useful Information**
>
> For example, if the member is the grandmother of the family member(s) you selected in the grid, enter **Grandmother** in the **Relationship** column and enter **Grandchild** in the **Reciprocal Relationship** column.

7. Click **Use/OK**.
8. Select whether or not you want to add the family relationship to the member's family record.
9. When you're finished, click **Save**.

To add a relationship with someone who isn't in your database

1. Locate the record of the family you want to add a relationship for.
2. In the navigation pane, click **Relationships**.
3. Enter the name of the person who has a relationship with the family.
4. Select the member(s) who the person has a relationship with, or select **[Name] Family** to create the relationship with the entire family.
5. Enter any additional information about the person.
6. When you're finished, click **Save**.

Send Courtesy Copies – Marks the relationship so you can send a courtesy copy when sending a letter to the family.

Show on Fam Directory – Prints the relationship information on Family Directory reports. This is helpful for divorced families

Viewing the Family Recap

To view a list of members and funds associated with a family, in the navigation pane, click **Family Recap**. Double-click a family member or fund to go directly to their respective windows. To print the recap, click **Print**.

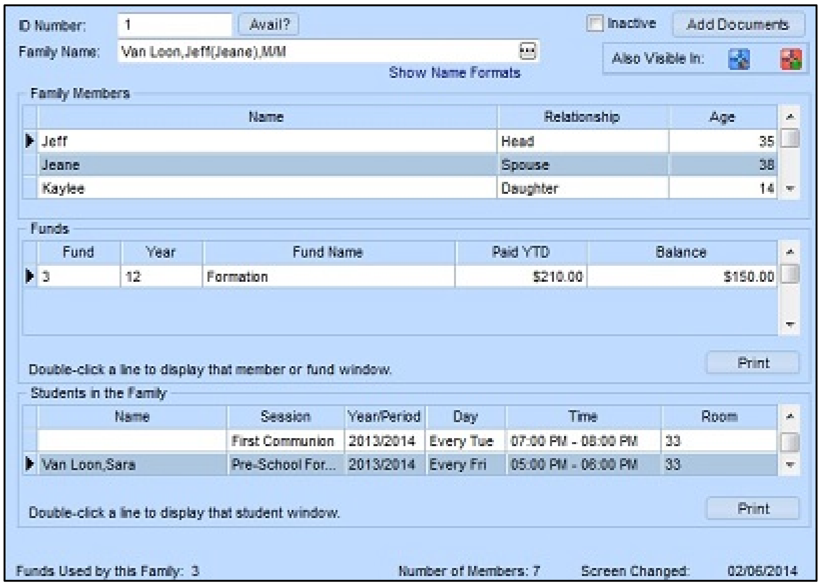


Fig. 1-14.

Keeping Track of Family Letters, Visits, Etc.

You can track outgoing and incoming correspondence such as letters and emails, phone calls, and visits. To keep track of correspondence with the family, in the navigation pane, click **Letters, Visits, Etc**.

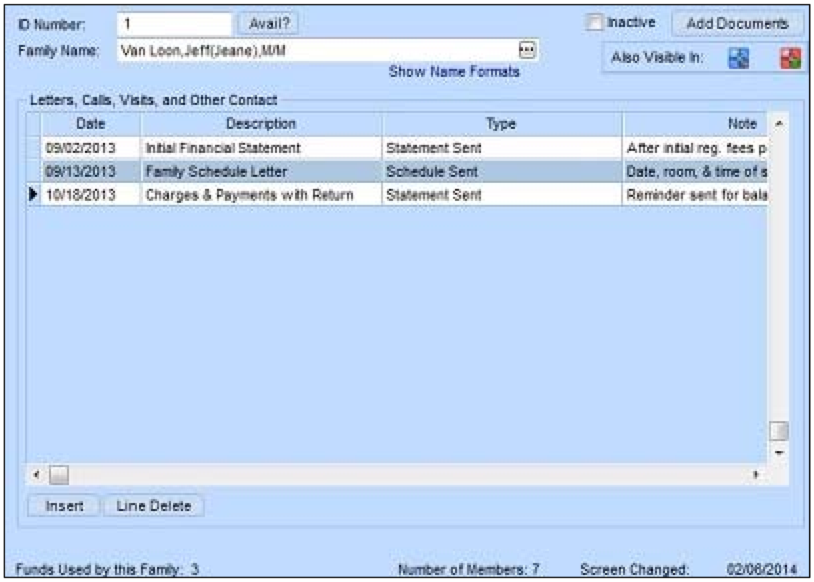


Fig. 1-15.

To keep track of family correspondence

1. Locate the record of the family.
2. In the navigation pane, click **Letters, Visits, Etc**.
3. Click **Insert**, and enter information about the correspondence.

> **Useful Information**
>
> You can enter up to 30 characters in each field.
>
> Some examples of what you can enter in the Description field include "Birthday Letter", "4th of July Email", or "Ministry Campaign Phone Call".
>
> The Type field uses entries from the Letter Types keyword list.

4. Click **Save**.

When you run a letter report or send an email to a family, the program asks if you want to log a history of the letter correspondence.

Using the Navigation Tools to Locate Families

Use the **Navigation** tools to locate or scroll through family records.

Fig. 1-16.

To scroll through families, click or . To jump to the first or last family, click or . To change the order of families, select an option in the **Order by** drop-down list.

To display a list of members in the current family, click **Members**. Click a member to go directly to their record.

To locate a particular family, in the **Search** field, enter the family's name and press **Enter**, or click . If the name has a special character, right-click in the **Search** field and click **Insert Symbol**.

In the **Search By** drop-down list, select an option to search by.

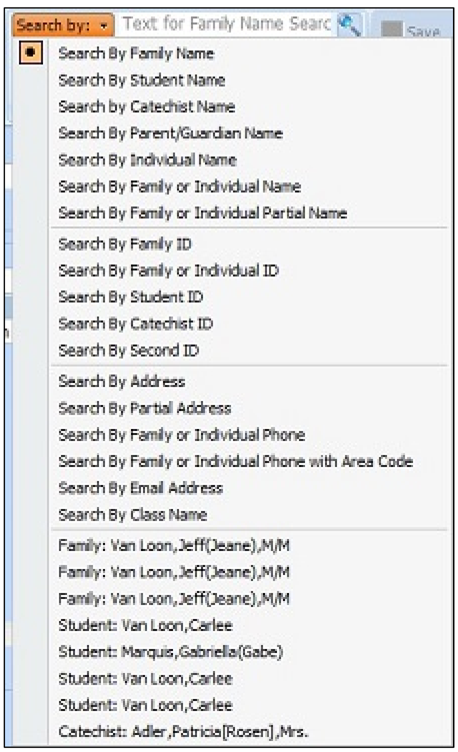


Fig. 1-17.

If you select an option that could return multiple families, such as **Search By Partial Address**, the program displays a list of matching families. From that list, select the family you want to view.

The bottom of the **Search By** drop-down list displays recently accessed families. Select one of these families to return to their record.

Family Tasks

In the **Tasks** group, you can save or cancel changes to the window, or add or delete families.

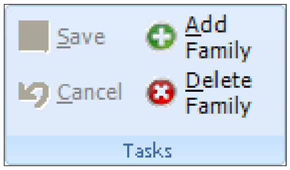


Fig. 1-18.

Save

To save all changes to the current family, click **Save**. The program automatically saves the current family when you do the following:

- Navigate to a different family.
- Add a new family.
- Switch between any of the sections in the navigation pane.
- Leave the Families window.
- Exit the program.

Cancel

To cancel any changes made since the last save, click **Cancel**.

Add Family

To add a new family, click **Add Family**. If there are families available in the database, but not visible in Formation Office, you have the opportunity to select them.

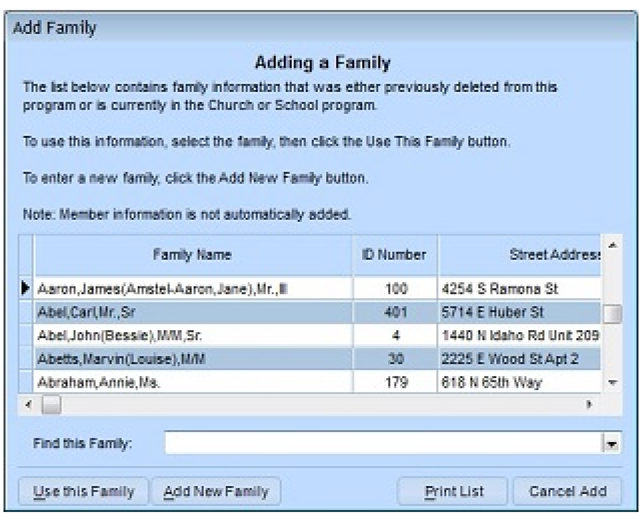


Fig. 1-19.

Use This Family — Make the selected family visible in the program.

Add New Family — Manually create a new family record.

Delete Family

To delete the current family, click **Delete Family**. The program displays a confirmation dialog box and a print dialog box. If the family is not used by another program, you can either hide the family in the database or permanently delete the family.

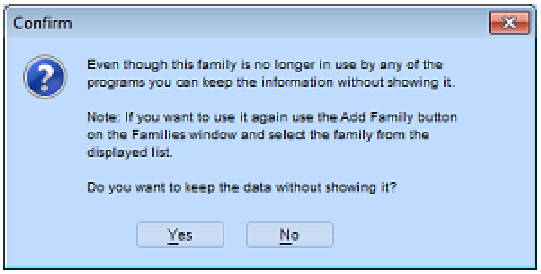


Fig. 1-20.

Creating an Individual Family Letter or Label

To create a letter addressed directly to the family, in the navigation pane, click **Individual Letter, Label**. A report wizard displays. For more information about creating letter reports, see the Reports chapter of this training guide.

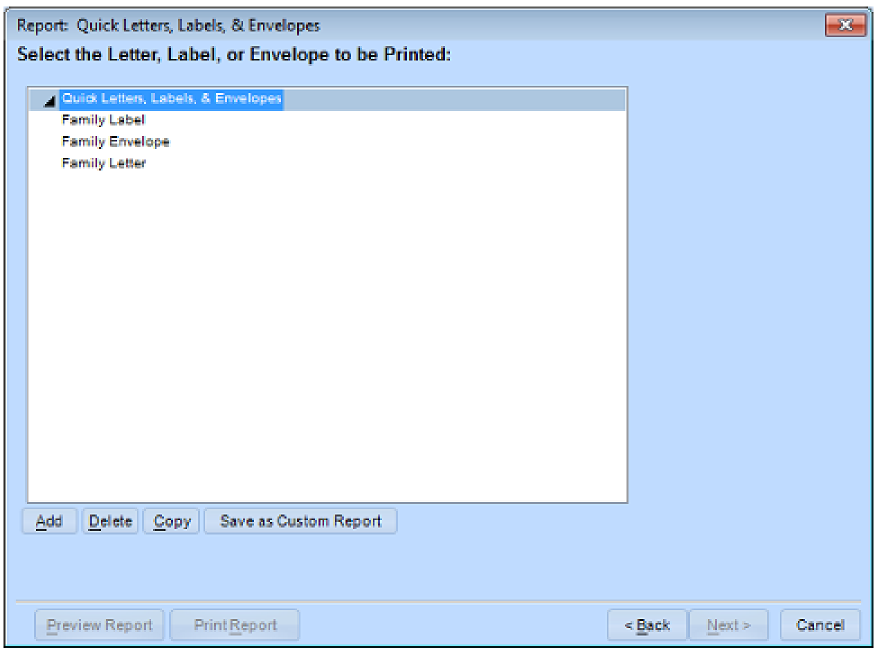


Fig. 1-21.

Viewing Reasons for Changes

To view reasons for changes to family information, click **Reasons for Changes** in the navigation pane of any family data entry window.

Useful Information

To configure the use of **Reasons for Changes** in the program, on the File menu, click **Setup > Initial Setup**. In the program options section, select **Ask for Reason on Significant Changes**.

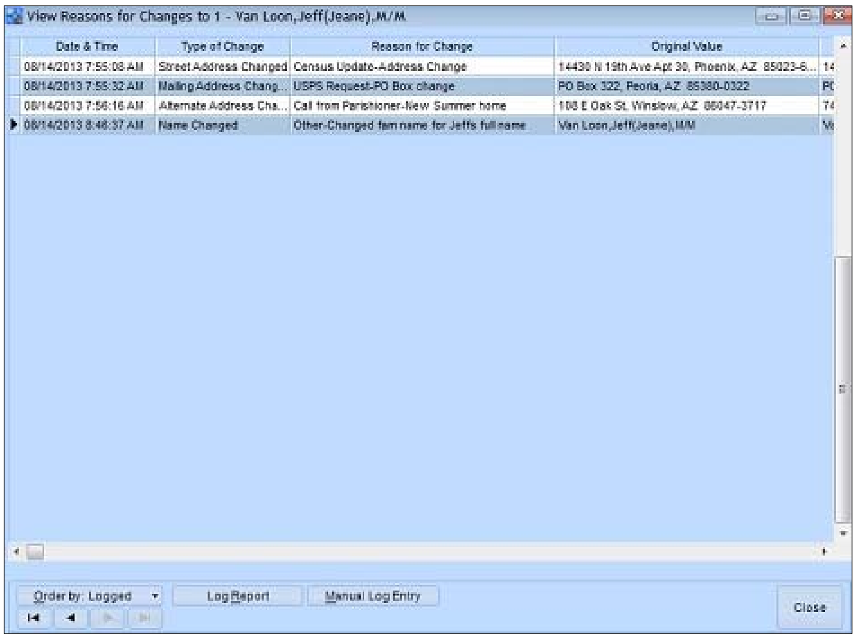


Fig. 1-22.

There are three buttons provided to help you with sorting, printing, and logging more information changes:

- Click **Order by** and select a column heading to reorder the log.
- Click **Log Report** to print a report of activity.
- Click **Manual Log Entry** to add an entry in the log for a change to family information that is outside of the range of automatically-logged changes. For example, if you select the **Send No Mail** check box on the Families window, then click **Save**, the Reason for Change dialog box does not display. You have to log the change manually for it to be on record.

Fig. 1-23.

To create a manual log entry

1. In the Families Primary Information window, click **Reasons for Changes**.
2. In the View Reasons for Changes dialog box, click **Manual Log Entry**.
3. In the **General Reason for Change** data field, click the drop-down arrow and make a relevant selection.
4. In the **More Info. for the Change** data field, enter more information about the change, such as the type of change you are making.
5. In the **Original Value** data field, enter the original data description.
6. In the **New Value** data field, enter the new data description.
7. Click **Log/OK**.

Exercise

Exercise #1

Add your own family. Include your:

- Name, using the Family Name dialog box.
- Address
- Phone, including work and home, marking the home phone as unlisted.
- Email
- Keywords, such as 'Receives Newsletter'.

Questions

Answer these questions pertaining to families.

Q: What two things should not be used in ID numbers?

A: ____

Q: How many phone numbers can a family have?

A: ____

Q: How many keywords can a family have?

A: ____

Q: Where can you record confidential remarks about a family?

A: ____

Q: How can you send a letter addressed directly to the family?

A: ____

2: About Students

The Students windows display information specific to a student as well as information about the student's family. You can view information pertinent to everything from everyday activities to emergency situations. To access student information, on the Information tab, click **Students**.

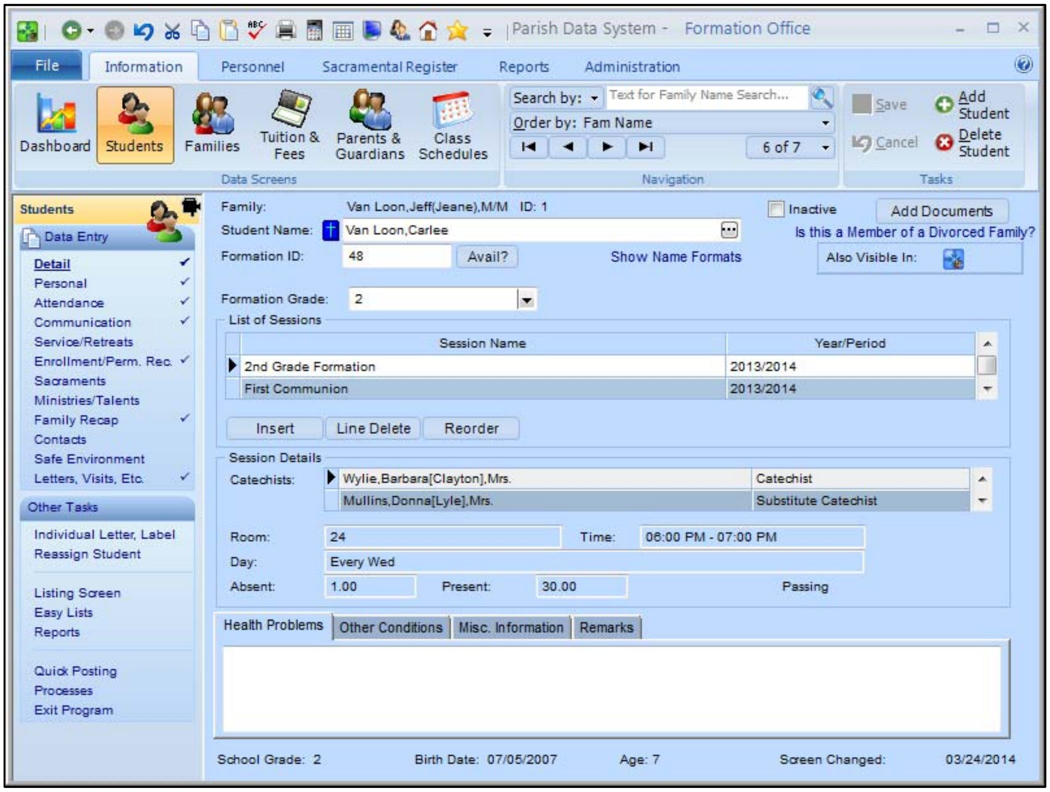


Fig. 2-1.

Student Fields that are Always Visible

As you access the different sections of the Students window, the following fields remain visible at the top of the window:

Status Icons

You may see various icons that indicate certain characteristics of individuals.

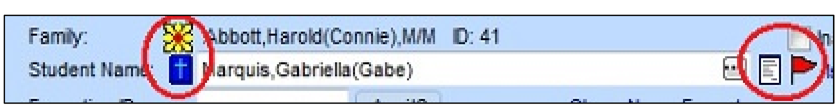
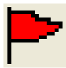
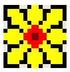


Fig. 2-2.

Icon	Description
	Signifies the individual has something entered for confidential remarks on the Student and Parents & Guardians Personal windows.
	Signifies the individual has something entered for special circumstances on the Students and Parents & Guardians Personal window.
	Signifies the individual has a different last name than the family.
	Signifies the individual is a student.

Student Name

Build the student name in the Member Name dialog box. At the end of the **Student Name** field, click .

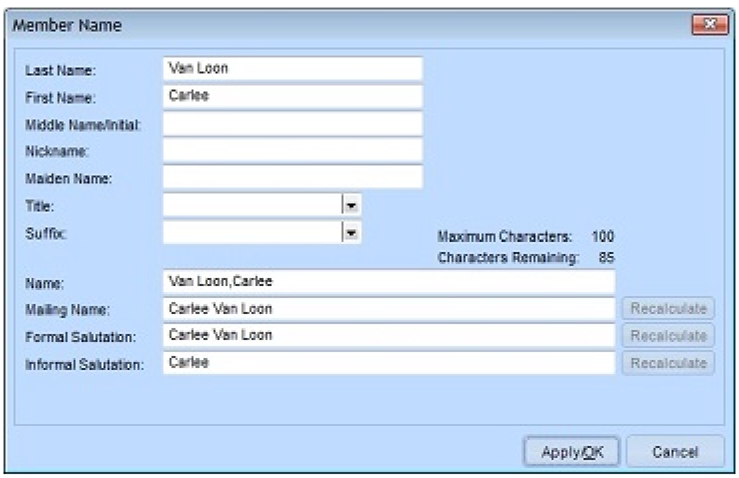


Fig. 2-3.

As you enter the different parts of the name, the program fills in the mailing name and salutations. If you manually change the mailing name or salutations, the **Recalculate** button becomes available. To restore the mailing name and salutations to the version the program created, click this button.

When you finish entering the name, click **Apply/OK**. In the Students window, if you want to view the mailing name and salutations for the student without editing anything, click **Show Name Formats**.

Add and View Documents

Click **Add Documents** to upload additional documents to support the information you've already entered. Once you have linked files to records in your program, click **View Documents** to view the documents associated with the current record. For more information, see the About Adding and Viewing Documents chapter of this training guide.

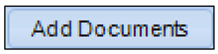


Fig. 2-4.

Also Visible In

If you share a database with another Office program, some individuals from that program may be visible in Formation Office. A blue icon indicates the individual is also a Church Office member. A red icon indicates the individual is also a School Office member. For more information about the different icons that can display here, see the Appendix chapter of this training guide.

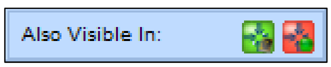


Fig. 2-5.

Active/Inactive vs. Delete

To indicate that the student is no longer active, select **Inactive**. Inactive individuals still display in the program and can be included in (or excluded from) reports. Depending on your organization's needs, you can define what "inactive" means and decide when to select this check box.

Useful Information

In a shared environment, each program maintains its own inactive flags unless you select to share inactive flags. In Church Office, on the File menu, click **Setup > Initial Setup**. In the **Share Data Options** section, select **Share Church Inactive Flags**. Then, in the Initial Setup window of the other program, select to use the shared fields.

To permanently remove a student from the program, locate the student's record, and in the **Tasks** group, click **Delete Student**. When you run reports, there is no option to include deleted students. If the student is used by any other program, it is hidden from view. However, if no other program uses this individual's record, you can either hide the student or permanently delete the individual's record. Once an individual is permanently deleted, the only way to recover their information is to restore data from a backup or manually re-enter their information.

Entering Student Details

The Detail window, you can enter or view the details about the student's sessions. To access this window, in the navigation pane, click **Details**.

The top portion of the window displays a list of sessions, and the bottom portion displays the details of the selected session. To add new sessions to the student's record, click **Insert** below the grid.

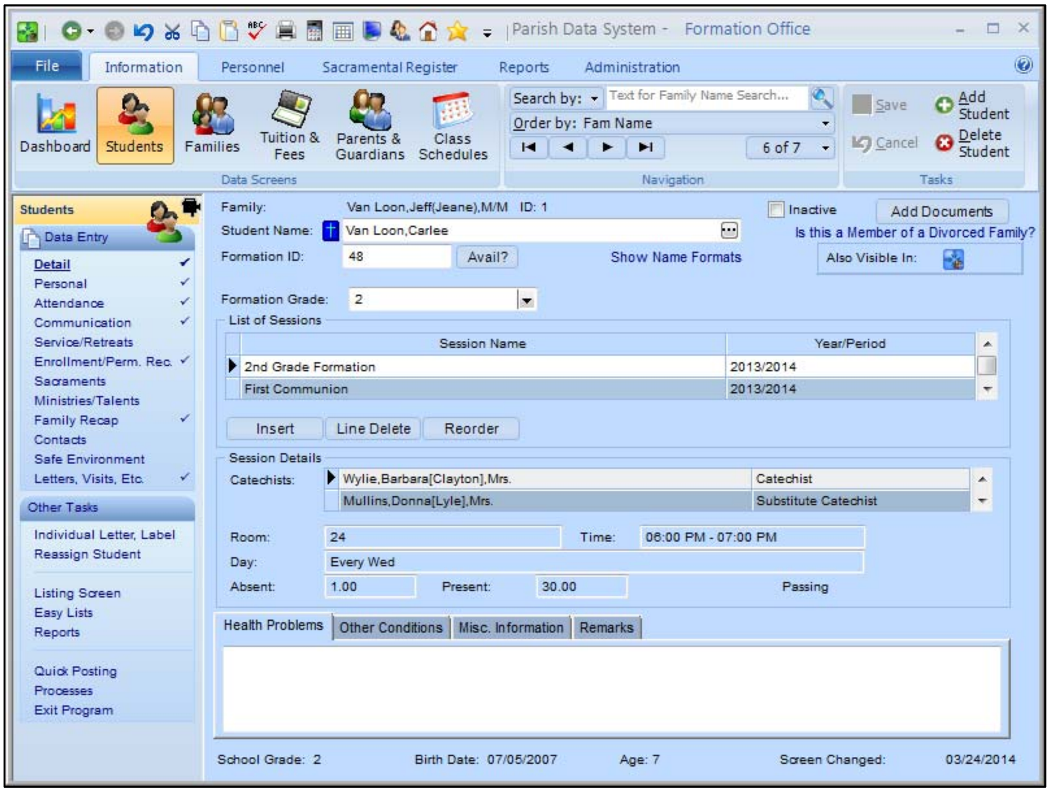


Fig. 2-6.

User Defined Remarks

On the user-defined remarks tabs, you can track health or miscellaneous information. By default, these fields are **Health Problems**, **Other Conditions**, **Misc. Information**, and **Remarks.**

> **Useful Information**
>
> You can change the terms used for these remark fields. On the File menu, click **Setup** > **Initial Setup**, and click the **Student Options** tab. Then in the **Student Information** section, define the names you want to use for Student Fields 1 – 4.

Entering Personal Information

In the Personal window, you can enter or view the student's gender, age, and any keywords associated with the student. To access this window, in the navigation pane, click **Personal**.

Fig. 2-7.

Relationship, **Grade/Degree**, **Marital Status**, **Language**, and **Ethnicity** — These are keywords built into the program. Any keywords you created also display in this window. In the example above, **Religion** and **Occupation** are user-defined keywords. To create user-keyword lists, on the File menu, click **Keywords > Student/ Parent/Guardian Keywords > User Keywords**. For more information about keywords, see the Keywords chapter of this training guide.

Birth Date and **Deceased Date** — Enter the birth date and/or deceased date, if applicable. You can use  to select the date. When entering a deceased date, the program displays the Mark Member Deceased dialog where you can specify common data updates such as adding deceased dates to the sacraments list, marking active talents and ministries as no longer involved, etc.

At the end of several date fields, there is a  button you can use to change the date formats.

Fig. 2-8.

Picture File — Enter the file path to the student's picture. To locate the path, click . Once you insert a picture, click the thumbnail to enlarge it.

Useful Information

To indicate where pictures are located, on the File menu, click **Setup > Initial Setup**. For the **Default Picture Subdirectory**, enter the file path to your pictures.

Remarks — Enter general, confidential, or special circumstances remarks. You can password-protect confidential remarks and special circumstances, so that only authorized users can view them. On the Administration tab, select an access level under Students > Confidential Stu. Remarks and Students > Student Special Circ.

Student Keywords — You can add an unlimited number of keywords per student. Student keywords are used to identify a group of students with something in common. Use a student keyword when there is no specific field available in the program for something you want to track. You can enter keywords "on the fly". If you enter a keyword that is not in the list, you can add it in this window if you have appropriate user rights. For more information about keywords, see the Keywords chapter of this training guide.

Tracking Attendance

In the Attendance window, you can track information about a student's attendance. In the navigation pane, click **Attendance**.

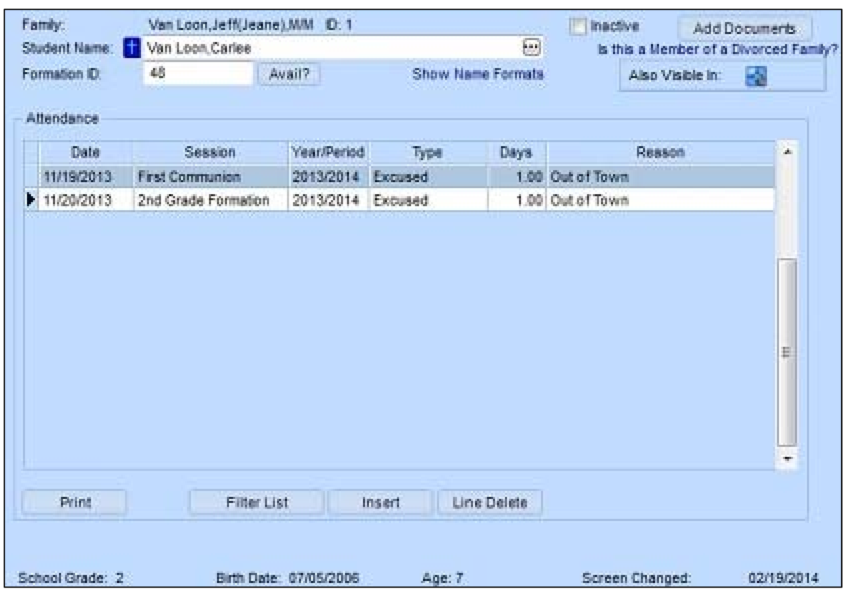


Fig. 2-9.

To enter attendance information

1. Click **Insert** below the grid, and enter the student's attendance information.

Useful Information

- The **Attendance For** field uses entries from the Attendance For Names keyword list.
- **Units** typically represent a number of hours or days, but you can define them however you want. On the File menu, click **Setup > Unit Name Definitions**.
- The **Reason** field uses entries from the Attendance Reason keyword list.

2. Click **Save**.

To filter the attendance list

1. In the navigation pane, click **Attendance**.
2. Click **Filter List** below the grid. Specify how you want to filter the list; you can filter the list by Session Name, Type and Date.

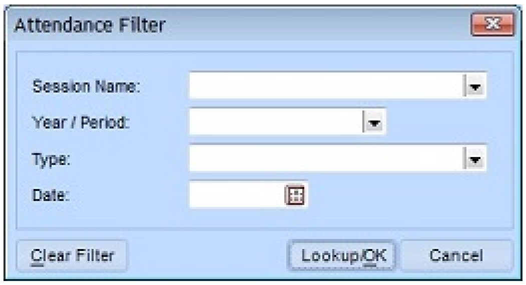


Fig. 2-10.

3. Click **Lookup/OK**.

Entering Student Communication

To enter a student's phone numbers, email addresses, and social media information, in the navigation pane, click **Communication**. This window also displays a recap of the family and member contact information. The information in the lower section of the window cannot be changed; however, you can print it.

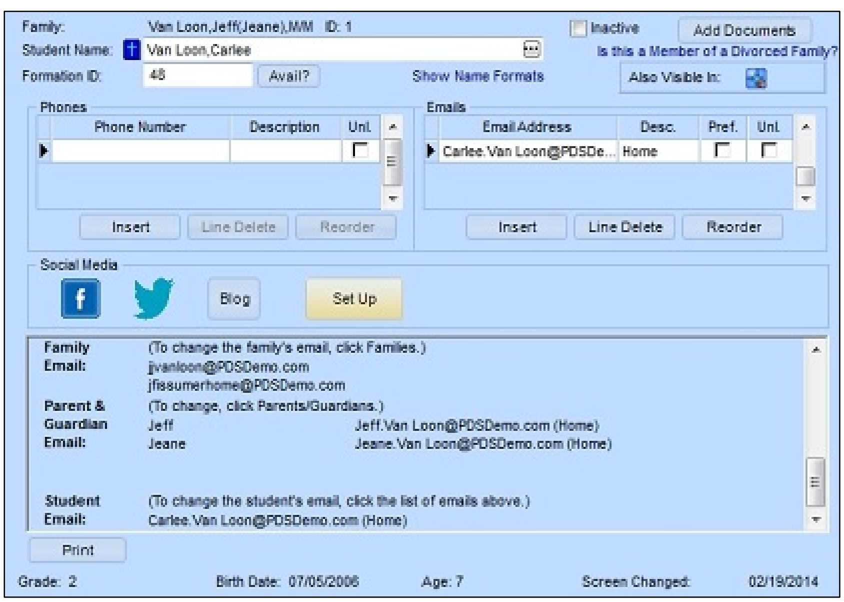


Fig. 2-11.

To insert a phone number or email address

1. Locate the appropriate individual.
2. In the navigation pane, click **Communication**.
3. Click **Insert** below each grid, and enter the individual's phone number(s) and/or email address(es).

4. If the phone number or email address is unlisted, select **Unl**.
5. If the individual prefers to receive email rather than mail, select **Pref**.
6. Click **Save**.

You can include a link to quickly access an individual's Facebook, Twitter, or Blog page from within the program.

Fig. 2-12.

To set up links to social media

1. Locate the appropriate individual.
2. In the navigation pane, click **Communication**.
3. In the Social Media section, click **Set Up**.
4. In the Social Media dialog box, enter the webpage address for each link you want to set up.

> **Useful Information**
>
> To ensure that the information you enter is correct, copy the webpage address from your Internet browser's address bar, then paste it into the appropriate field.

5. Click **Save/OK**.

After you set up the links, in the Communication window, click the icon of the social media page you want to view. The webpage opens in your Internet browser.

Viewing Service and Retreats

The Service and Retreats window displays services a student has performed or retreats they attended. In the navigation pane, click **Service/Retreats**.

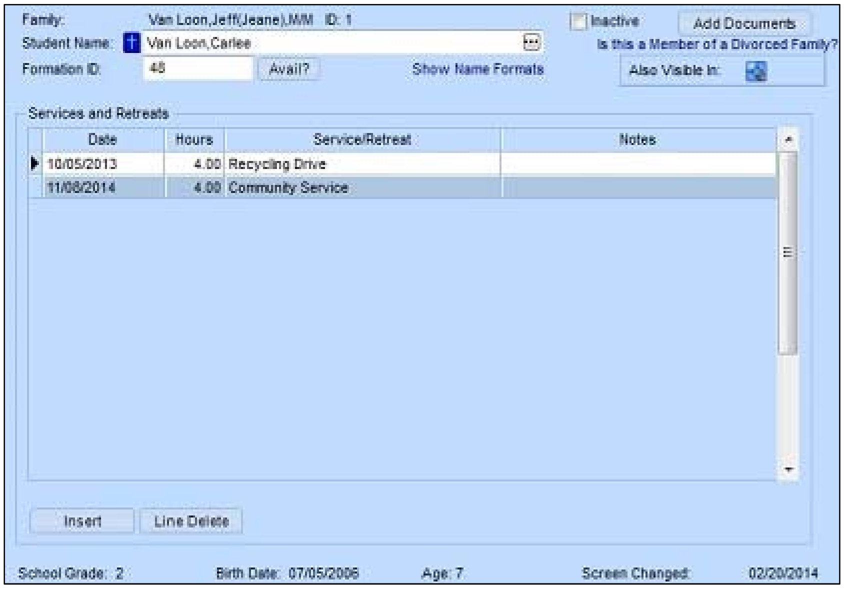


Fig. 2-13.

To enter a student's service/retreat information, click **Insert** below the grid. Click **Save** when you're done.

Useful Information

The **Service/Retreat** field uses entries from the Service/Retreat Names keyword list.

Viewing Enrollment History and Permanent Records

The Enrollment/Perm. Rec. window displays a student's enrollment history and their permanent record. At the top of the window, the student's enrollment history displays by date, year, and grade. At the bottom of the window, a permanent record of sessions displays and whether or not the student passed.

In the navigation pane, click **Enrollment/Perm. Rec**.

Fig. 2-14.

To enter enrollment history information, click **Insert** below the Enrollment History grid.

Useful Information

Enrollment information can also be posted to this window when using the Enrollment process. To use the Enrollment process, in the Students navigation pane, click **Processes > Enrollment**.

The Grade field uses entries from the **Grades and Degrees** keyword list.

To enter permanent record information, click **Insert** below the Permanent Record grid.

Useful Information

Permanent Record information can also be posted to this window when using the End of Year – Formation Remove/Advance process. In the Students navigation pane, click **Processes > End of Year – Formation Remove/Advance**.

To print a simple report of the permanent record information, click **Print**.

Entering Sacrament Information

In the Sacraments window, there are multiple tabs that display detailed sacramental information. In the navigation pane, click **Sacraments**.

On each tab, you can enter and edit sacramental information.

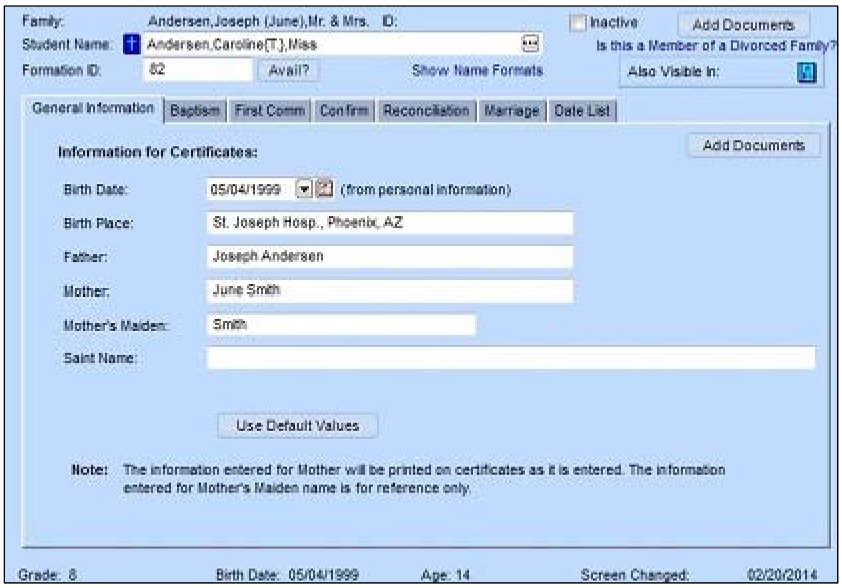


Fig. 2-15.

With the exception of the General Information and Date List tabs, you can customize the sacrament tab names. On the File menu, click **Keywords > Student/ Parent/Guardian Keywords > Sacrament Date Names**. You can track an unlimited number of dates.

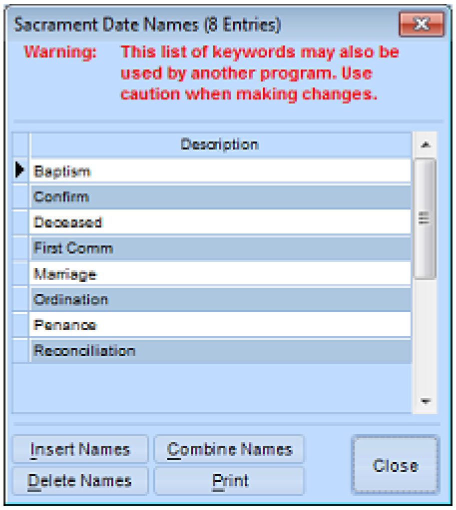


Fig. 2-16.

In the Sacraments window, you can view up to eight sacrament tabs. The sacraments you select display on individual tabs between the General and Date List tabs. Any additional sacraments you want to track display on the Date List tab.

To select the eight most important sacraments, on the File menu, click **Sacrament Setup > Sacrament Tab Names**. You can also label the **Extra Information** field in this window, which then displays on the relevant tab.

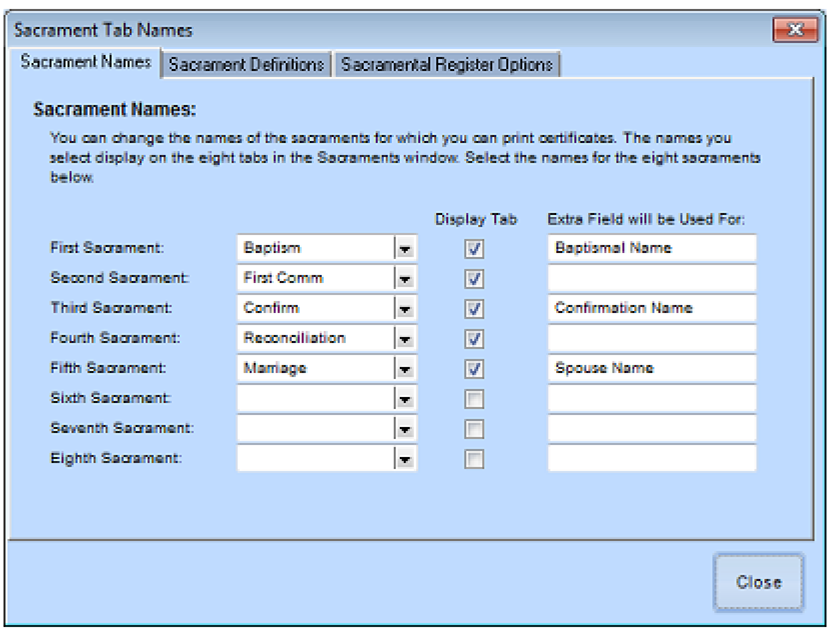


Fig. 2-17.

If you share your database with another Office program, the eight tabs you identify in this window are used in all programs. If you want to track a sacrament but not display it, clear the **Display Tab** check box. These check boxes are stored individually for each program. For example, in Church Office, you can track and display Marriage, and in Formation Office, you can select to hide Marriage.

In the Sacraments window, on the General Information tab, view or enter birth data. To insert the **Birth Date**, **Head of Household**, and **Spouse** values entered in the Personal window, click **Use Default Values**.

On the Date List tab, view a list of all sacraments. If you change information on this tab, the appropriate sacrament tab is also updated.

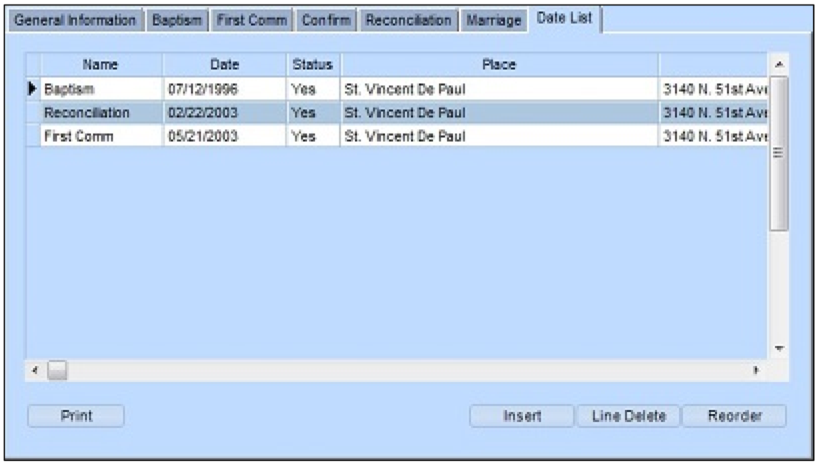


Fig. 2-18.

The tabs between the General and Date List tabs display information about the individual sacraments. For these tabs, select the sacraments you want to print certificates for or track sponsor information.

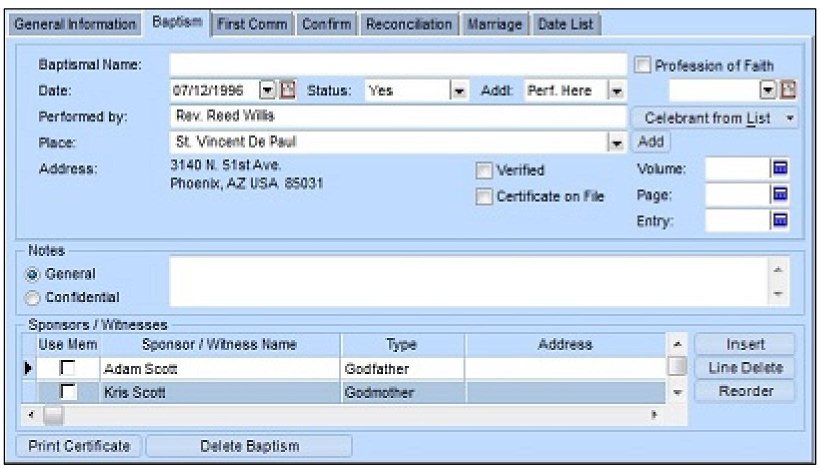


Fig. 2-19.

To maintain the names and addresses of churches where the sacraments are administered, on the File menu, click **Sacrament Setup > Sacrament Place Names and Addresses**.

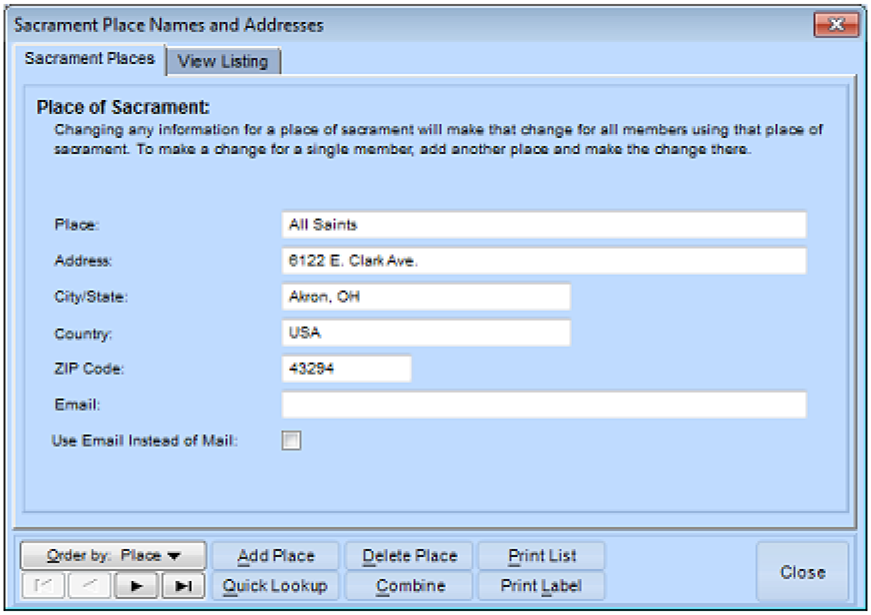


Fig. 2-20.

To print the information on the sacrament tabs, click **Print Certificate**.

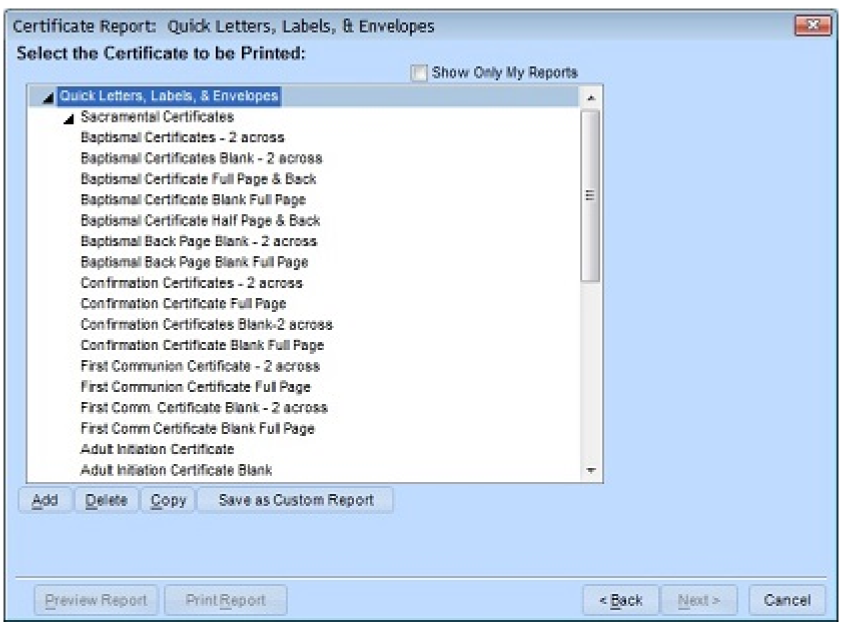


Fig. 2-21.

Select the style of certificate you want to print. If you click **Print Certificate** on the Confirmation sacrament tab, the program uses the confirmation information from that tab, but you must indicate you want to print the information on one of the Confirmation forms.

To create your own certificates, click **Add**. Or, to modify a predefined certificate style, click **Copy**. The report wizard steps you through setting up the certificate. For more information, see the Reports chapter of this training guide.

Confirmation Certificate

Caroline Teresa Andersen

Child of Joseph Andersen and June Smith

Baptized the Twelfth day of July 1996

Was Confirmed

on the Thirtieth day of May 2014

by Rev. Williams

The Sponsor being Roger Thompson

From the Confirmation Register of this Church
Parish Data System
10210 N 25th Ave, Suite 230 Phoenix, AZ 85021-1609

Dated February 20, 2014

Pastor

Fig. 2-22.

Entering Ministries and Talents

The Ministries/Talents window displays which ministries the student is involved in and the talents the student chooses to share. A ministry is a church-related group or activity that an individual can participate in, such as choir or money counter. A talent is a special skill the individual has, such as painting or CPR training. Ministries, talents, and statuses are keywords.

In the navigation pane, click **Ministries/Talents**.

Fig. 2-23.

To insert a ministry or talent

1. Locate the appropriate record.
2. In the navigation pane, click **Ministries/Talents**.
3. Click **Insert** below each grid, and enter the student's ministry and/or talents or select one from the drop-down list.
4. Enter any additional information, if known.

> **Useful Information**
>
> The **Status** field is a keyword field that indicates their level of involvement or interest.

5. Click **Save**.

Viewing the Family Recap

You can view a list of an individual's family members and the funds associated with his or her family. In the navigation pane, click **Family Recap**.

Fig. 2-24.

To view family members and funds

1. Locate the appropriate individual.
2. In the navigation pane, click **Family Recap**.
3. The members of the family display in the Family Members grid. The family's fund information displays in the Funds grid.

   Useful Information

   The information in the grids is view-only and can't be edited.

4. Double-click a family member or fund to go directly to their respective windows.
5. To print a simple report of the information, click **Print**.

Useful Information

Alternatively, you can quickly view the other family members by clicking the **1 of #** drop-down list in the Navigation group.

Entering Emergency Contacts

The Contacts window displays a student's emergency contacts, other than the parents/guardians. This can include neighbors, grandparents, doctors, etc. You can enter an unlimited number of contacts and an unlimited number of phone numbers for each. In the navigation pane, click **Contacts**.

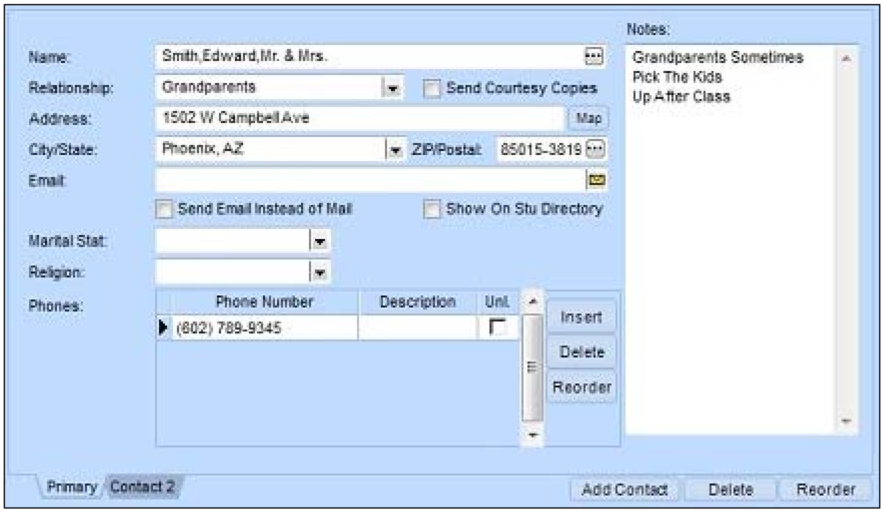


Fig. 2-25.

To add an emergency contact

1. Locate the appropriate student.
2. In the navigation pane, click **Contacts**.
3. Click **Add Contact**.

Useful Information

Because siblings usually have the same emergency contacts, one student can "borrow" a contact from another sibling. When you click **Add Contact**, the program asks if you want to borrow a contact from another family student. To do so, click **Yes**, select the contact, and the information is automatically added to this student's record.

4. Enter any information you want to include.

Useful Information

The Relationship field uses entries from the Relationship Names keyword list.

5. Click **Save**.

As you add contacts, a tab displays at the bottom for each contact.

About Safe Environment

In the Safe Environment window, you can track any background checks or other requirements necessary for the individual to be around or work with children. In the navigation pane, click **Safe Environment**.

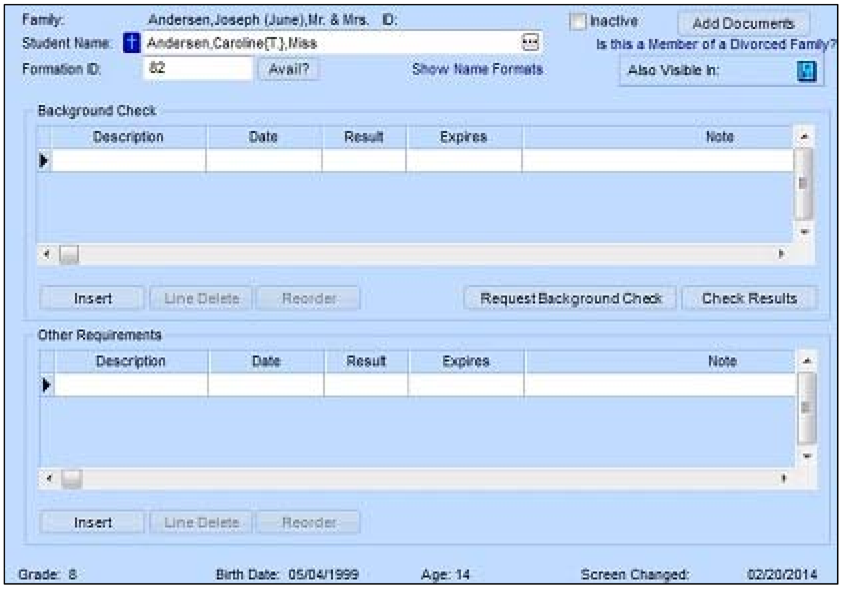


Fig. 2-26.

In the top portion of this window, enter information acquired when doing background checks such as federal, employment, and fingerprint background checks. In the bottom portion, enter any other requirements that must be met such as sensitivity training, reference letters, etc.

Useful Information

- The Background Check **Description** field uses entries from the Background Check Descriptions keyword list.
- The Other Requirements **Description** field uses entries from the Requirement Descriptions keyword list.
- The **Result** field uses a pre-defined list of terms.
- The **Note** field is an open remarks field that can contain up to 50 characters of information.

We partner with SecureSearch™ to provide background screening results for individuals in your parish, such as personnel or volunteers.

Useful Information

To use this feature, you must create an account with SecureSearch. Complete the SecureSearch Agreement for Service and fax it to 1-866-552-7326.

For more information, visit www.parishdata.com/backgroundchecks.

Once you have an account, you can manage an individual's background checks in the Safe Environment section where you can:

- Request a background check for an individual.
- Receive the background check results from SecureSearch.
- Enter additional legal requirements.

You can purchase individual background checks from within your PDS program.

To run a background check

1. Locate the individual's record.
2. In the navigation pane, click **Safe Environment**.
3. Click **Request Background Check**, and log in to the service.
4. Products and prices are listed. Select the options you want, enter the required information, and click **Submit**.
5. Close the background check window.
6. Click **Check Results** to see if your results have been received.

Keeping Track of Student Letters, Visits, Etc.

You can track outgoing and incoming correspondence such as letters and emails, phone calls, and visits. To keep track of correspondence with an individual, in the navigation pane, click **Letters, Visits, Etc**.

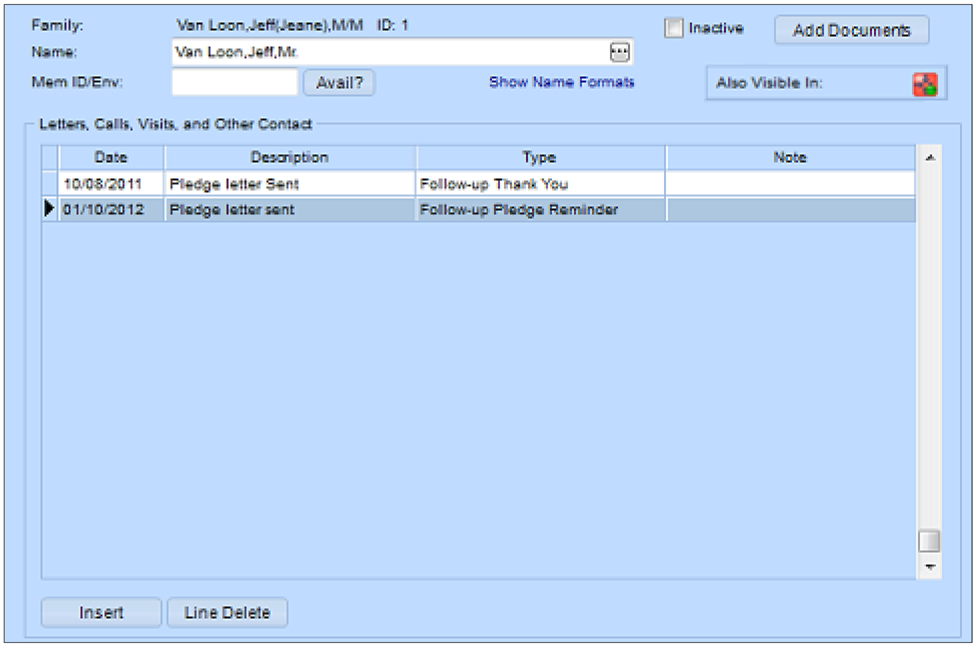


Fig. 2-27.

To keep track of student correspondence

1. Locate the record of the student.
2. In the navigation pane, click **Letters, Visits, Etc**.
3. Click **Insert**, and enter information about the correspondence.

> **Useful Information**
>
> You can enter up to 30 characters in each field.
> Some examples of what you can enter in the Description field include "Schedule Letter", "Event Calendar", or "Confirmation Certificate".
> The Type field uses entries from the Letter Types keyword list.

4. Click **Save**.

When you run a letter report or send an email to a student, the program asks if you want to log a history of the letter correspondence. For more information about logging letters, see Logging Letters in the Reports chapter of this training guide.

Using the Navigation Tools to Locate Students

Use the **Navigation** tools to locate or scroll through student records.

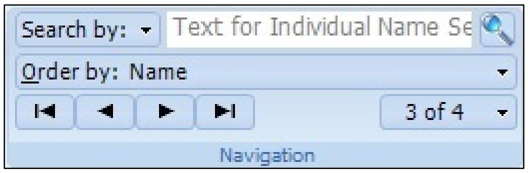


Fig. 2-28.

To scroll through students, click  or . To jump to the first or last student, click  or . To change the order of students, select an option in the **Order by** drop-down list.

To display a list of students in the current family, click . This button depends on the number of members in the family. Click a member to go directly to their record.

To locate a particular individual, in the **Search** field, enter their name and press **Enter**, or click . If the name has a special character, right-click in the **Search** field and click **Insert Symbol**.

In the **Search By** drop-down list, select an option to search by.

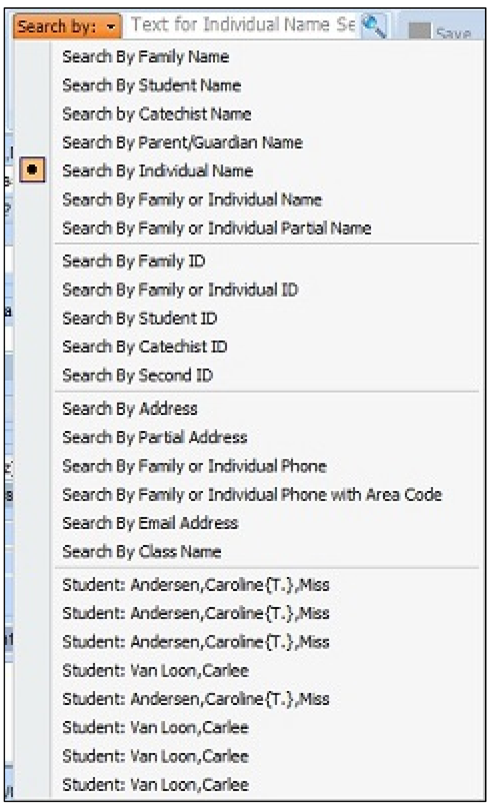


Fig. 2-29.

If you select an option that could return multiple individuals, such as **Search By Partial Address**, the program displays a list of matching individuals. From that list, select the individual you want to view.

The bottom of the **Search By** drop-down list displays recently accessed families and individuals. Select one of these families or individuals to return to their record.

Student Tasks

In the **Tasks** group, you can save or cancel changes to the window, or add or delete students.

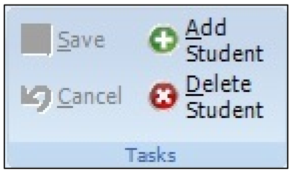


Fig. 2-30.

Save

To save all changes to the current student, click **Save**. The program automatically saves the current record when you do the following:

- Navigate to a different student.
- Add a new student.
- Switch between any of the sections in the navigation pane.
- Leave the Students window.
- Exit the program.

Cancel

To cancel any changes made since the last save, click **Cancel**.

Add Student

To add a new student, click **Add Student**. If there are members for this family available in the database, but not visible in Formation Office, you have the opportunity to select them.

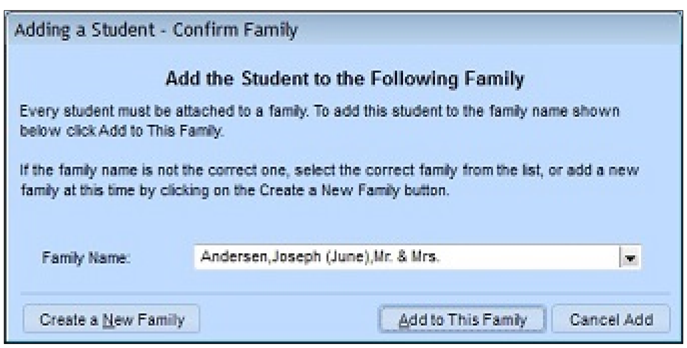


Fig. 2-31.

Add to This Family — If the student's family already exists in the program, select it in the drop-down list, then click this button.

Create a New Family — If the student's family does not exist in the program, click this button to add it. For more information, see the About Families chapter of this training guide.

Delete Student

To delete the current student, click **Delete Student**. The program displays a confirmation dialog box and a print dialog box. If the student is not used by another program, you can either hide them in the database or permanently delete the student.

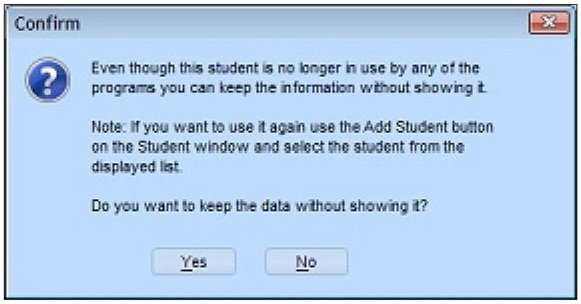


Fig. 2-32.

Reassigning a Student

You may need to reassign a student to another family. For example, if a child goes to live with their grandparents, you can transfer the child's record to the grandparents' existing record.

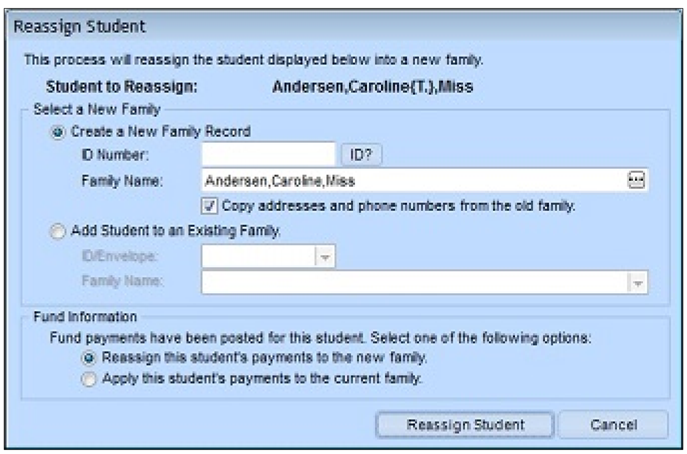


Fig. 2-33.

To reassign a student

1. Locate the appropriate record.
2. In the navigation pane, click **Reassign Student**.
3. Select whether to create a new family record or add the student to an existing family.
4. If you create a new family, select whether to copy addresses and phone numbers.
5. Enter or select the ID number and family name.
6. If fund payments have been posted for the student, select an option for their payments.
7. When you're finished, click **Reassign Student**.

About Deceased Students

When a student dies, instead of deleting their record from the program, you can indicate they are deceased and retain their information. When entering a deceased date, the program displays the Mark Member Deceased dialog where you can specify common data updates, all from one location. The student's name displays in red, the **Inactive** check box displays as **Deceased**, and the age of the student no longer advances.

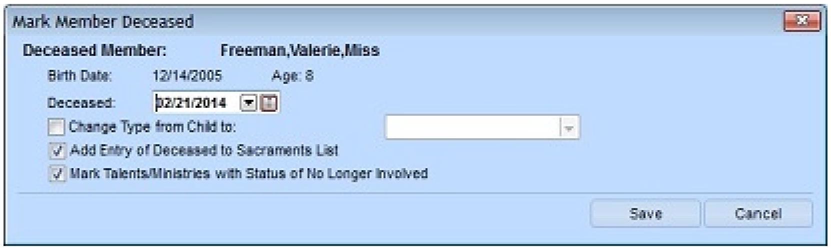


Fig. 2-34.

Deceased Member

Use the **Decease Member** section to make some common changes for the deceased student's record.

Change Type — Select this option if you want the program to change the individuals type and then specify the type using the drop-down type list.

Add Entry of Deceased to Sacraments List — Select this option if you want the program to automatically add an entry in the Date List tab of the students Sacraments window.

Mark Talents/Ministries with Status of No Longer Involved — Select this option to change the status of any active ministries or talents to **No Longer Involved** on the student's Ministries/Talents window.

About Students - Exercises

Exercise #1 — Add a student to your family. Use the following information:

- Name — Miss Elizabeth Williams "Betsy"
- Birth date — 12/10/2003
- Grade — 3

Exercise #2 — Add the following sacrament information for Betsy.

- She was baptized on 12/15/2003 at this parish.
- The baptism was performed by Fr. Robert Zello.
- She is sponsored by Melissa Brown, a family friend.

Exercise #3 — Print the Baptismal Certificate for Betsy.

Exercise #4 — Add an emergency contact for Betsy. Use the following information:

- Contact Name — Mrs. Esther Williams, grandmother
- Address — 123 Sugar Plum Lane, Glendale, AZ 85055
- Home Phone — (623) 545-9087

About Students - Questions

Q: What symbol indicates that the student has a different last name?

A: ____

Q: What information can you add to the Communications window?

A: ____

Q: How many emergency contacts can a student have?

A: ____

Q: How can a student "borrow" a sibling's emergency contact?

A: ____

Q: What is the maximum number of sacraments that can display at once in the Sacraments window?

A: ____

Q: Where do you change the order of the sacrament tabs?

A: ____

Q: Where do you maintain the actual Sacrament Date names?

A: ____

Q: How do you print a Confirmation Certificate from the sacrament tab?

A: ____

3: About Parents and Guardians

The Parents & Guardians windows display information specific to a parent/guardian, including personal information, contact information, ministries, talents, funds, and other items. To access parent/guardian information, on the Information tab, click **Parents & Guardians**.

Fig. 3-1.

Parent/Guardian Name

Build the parent/guardian's name in the Member Name dialog box. At the end of the **Parent/Guard.** name field, click .

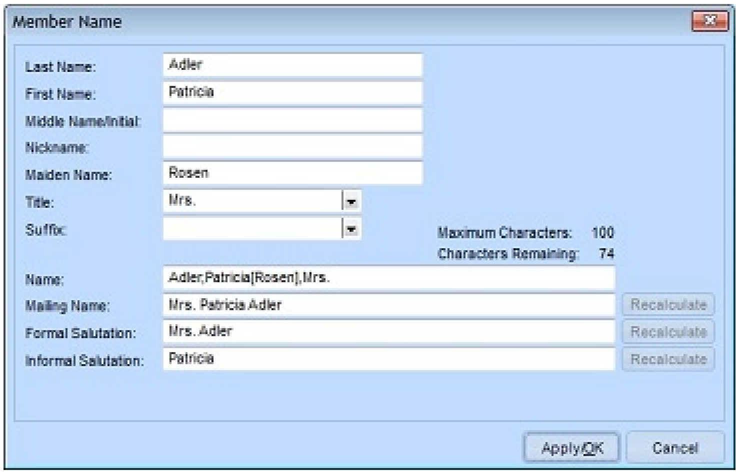


Fig. 3-2.

As you enter the different parts of the name, the program fills in the mailing name and salutations. If you manually change the mailing name or salutations, the **Recalculate** button becomes available. To restore the mailing name and salutations to the version the program created, click this button.

When you finish entering the name, click **Apply/OK**. In the Parents & Guardians window, if you want to view the mailing name and salutations for the parent/guardian without editing anything, click **Show Name Formats**.

Add and View Documents

Click **Add Documents** to upload additional documents to support the information you've already entered. Once you have linked files to records in your program, click **View Documents** to view the documents associated with the current record. For more information, see the About Adding and Viewing Documents chapter of this training guide.

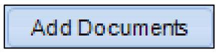


Fig. 3-3.

Also Visible In

If you share a database with another Office program, some individuals from that program may be visible in Formation Office. A blue icon indicates the individual is also a Church Office member. A red icon indicates the individual is also a School Office member. For more information about the different icons that can display here, see the Appendix chapter of this training guide.

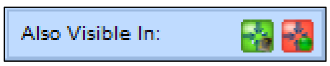


Fig. 3-4.

Active/Inactive vs. Delete

To indicate that the parent/guardian is no longer active, select **Inactive**. Inactive individuals still display in the program and can be included in (or excluded from) reports. Depending on your organization's needs, you can define what "inactive" means and decide when to select this check box.

Useful Information

In a shared environment, each program maintains its own inactive flags unless you select to share inactive flags. In Church Office, on the File menu, click **Setup > Initial Setup**. In the **Share Data Options** section, select **Share Church Inactive Flags**. Then, in the Initial Setup window of the other program, select to use the shared fields.

To permanently remove a parent/guardian from the program, locate the parent/guardian's record, and in the **Tasks** group, click **Delete Par/Grd**. When you run reports, there is no option to include deleted parent/guardians. If the individual is used by any other program, it is hidden from view. However, if no other program uses this individual's record, you can either hide the parent/guardian or permanently delete the individual's record. Once an individual is permanently deleted, the only way to recover their information is to restore data from a backup or manually re-enter their information.

Entering Personal Information

In the Personal window, you can enter or view the parent/guardian's relationship, age, and any keywords associated with the parent/guardian. To access this window, in the navigation pane, click **Personal**.

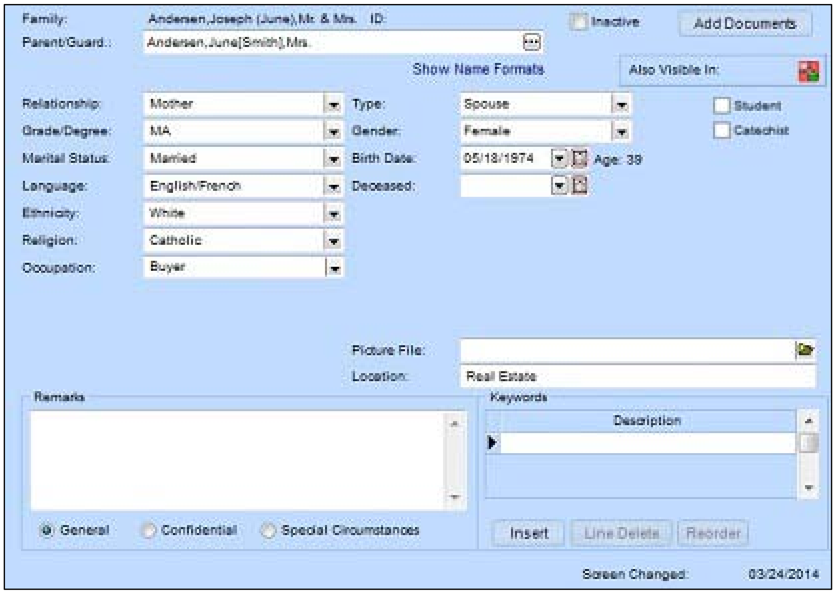


Fig. 3-5.

Relationship, **Grade/Degree**, **Marital Status**, **Language**, and **Ethnicity** — These are keywords built into the program. Any keywords you created also display in this window. In the example above, **Religion** and **Occupation** are user-defined keywords. To create user-keyword lists, on the File menu, click **Keywords > Student/Parent/Guardian Keywords > User Keywords**. For more information about keywords, see the Keywords chapter of this training guide.

Birth Date and **Deceased Date** — Enter the birth date or deceased date, if applicable. You can use to select the date. When entering a deceased date, the program displays the Mark Member Deceased dialog where you can specify common data updates such as adding deceased dates to the sacraments list, marking active talents and ministries as no longer involved, etc.

At the end of several date fields, there is a button you can use to change the date formats.

Fig. 3-6.

Picture File — Enter the file path to the parent/guardian's picture. To locate the path, click . Once you insert a picture, click the thumbnail to enlarge it.

> **Useful Information**
>
> To indicate where pictures are located, on the File menu, click **Setup > Initial Setup**. For the **Default Picture Subdirectory**, enter the file path to your pictures.

Remarks — Enter general, confidential, or special circumstances remarks. You can password-protect confidential remarks and special circumstances, so that only authorized users can view them. On the Administration tab, select an access level under Parents/Guardians > Confidential P/G Remarks and Parents/Guardians > P/G Special Circumstances.

Keywords — You can add an unlimited number of keywords per parent/guardian. Parent/Guardian keywords are used to identify a group of parent/guardians with something in common. Use a keyword when there is no specific field available in the program for something you want to track. You can enter keywords "on the fly". If you enter a keyword that is not in the list, you can add it in this window if you have appropriate user rights. For more information about keywords, see the Keywords chapter of this training guide.

Entering Parent/Guardian Communication

To enter a parent/guardian's phone numbers, email addresses, and social media information, in the navigation pane, click **Communication**. This window also displays a recap of the family and member contact information. The information in the lower section of the window cannot be changed; however, you can print it.

Fig. 3-7.

To insert a phone number or email address

1. Locate the appropriate individual.
2. In the navigation pane, click **Communication**.
3. Click **Insert** below each grid, and enter the individual's phone number(s) and/or email address(es).
4. If the phone number or email address is unlisted, select **Unl**.
5. If the individual prefers to receive email rather than mail, select **Pref**.

6. Click **Save**.

You can include a link to quickly access an individual's Facebook, Twitter, or Blog page from within the program.

Fig. 3-8.

To set up links to social media

1. Locate the appropriate individual.
2. In the navigation pane, click **Communication**.
3. In the Social Media section, click **Set Up**.
4. In the Social Media dialog box, enter the webpage address for each link you want to set up.

> **Useful Information**
>
> To ensure that the information you enter is correct, copy the webpage address from your Internet browser's address bar, then paste it into the appropriate field.

5. Click **Save/OK**.

After you set up the links, in the Communication window, click the icon of the social media page you want to view. The webpage opens in your Internet browser.

Entering Ministries and Talents

The Ministries/Talents window displays the ministries the parent/guardian is involved in and the talents they choose to share. A ministry is a church-related group or activity that an individual can participate in, such as choir or money counter. A talent is a special skill the individual has, such as painting or CPR training. Ministries, talents, and statuses are keywords.

In the navigation pane, click **Ministries/Talents**.

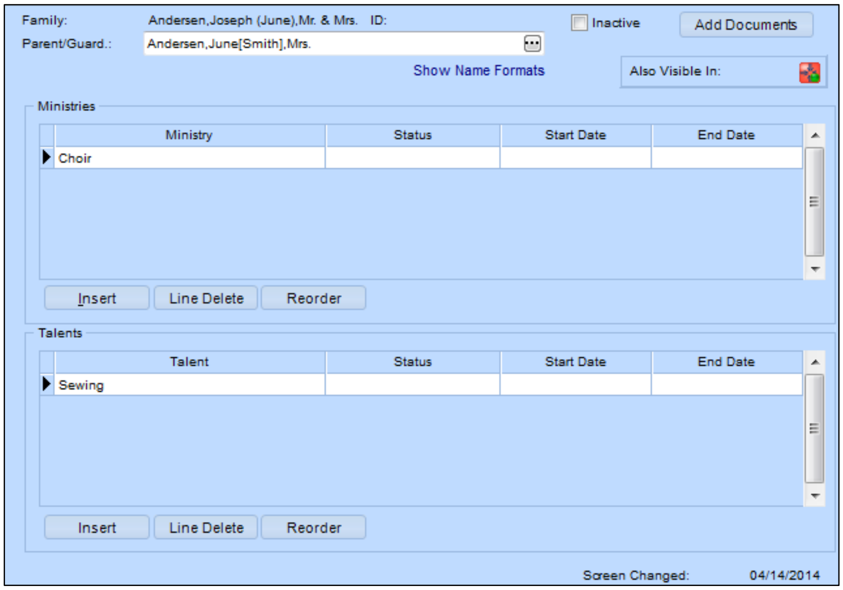


Fig. 3-9.

To insert a ministry or talent

1. Locate the appropriate record.
2. In the navigation pane, click **Ministries/Talents**.
3. Click **Insert** below each grid, and enter the parent/guardian's ministry and/or talents or select one from the drop-down list.
4. Enter any additional information, if known.

> **Useful Information**
>
> The **Status** field is a keyword field that indicates their level of involvement or interest.

5. Click **Save**.

Viewing the Family Recap

You can view a list of an individual's family members and the funds associated with his or her family. In the navigation pane, click **Family Recap**.

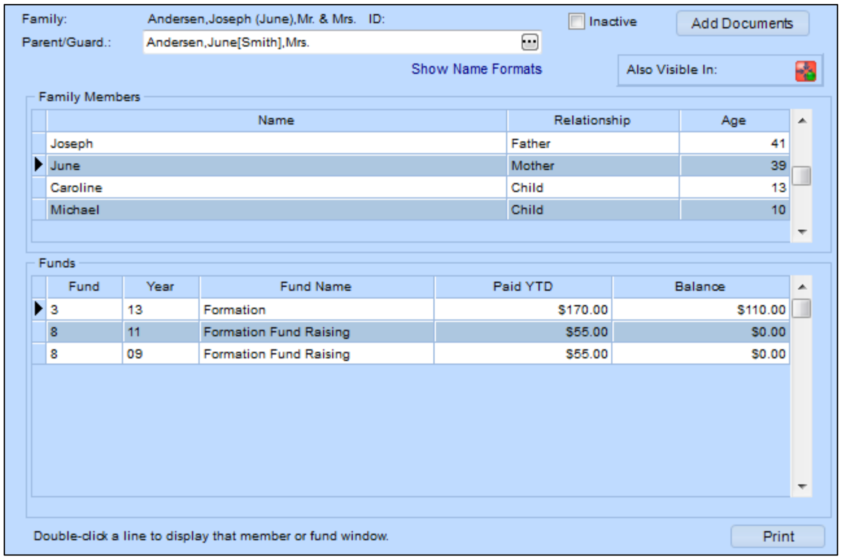


Fig. 3-10.

To view family members and funds

1. Locate the appropriate individual.
2. In the navigation pane, click **Family Recap**.
3. The members of the family display in the Family Members grid. The family's fund information displays in the Funds grid.

> **Useful Information**
>
> The information in the grids is view-only and can't be edited.

4. Double-click a family member or fund to go directly to their respective windows.
5. To print a simple report of the information, click **Print**.

> **Useful Information**
>
> Alternatively, you can quickly view the other family members by clicking the **1 of #** drop-down list in the Navigation group.

Entering Volunteer Areas

In the Volunteer/Prep Classes section, you can enter information about the volunteer experiences or preparation classes that a parent or guardian participates in. In the navigation pane, click **Volunteer/Prep Classes**.

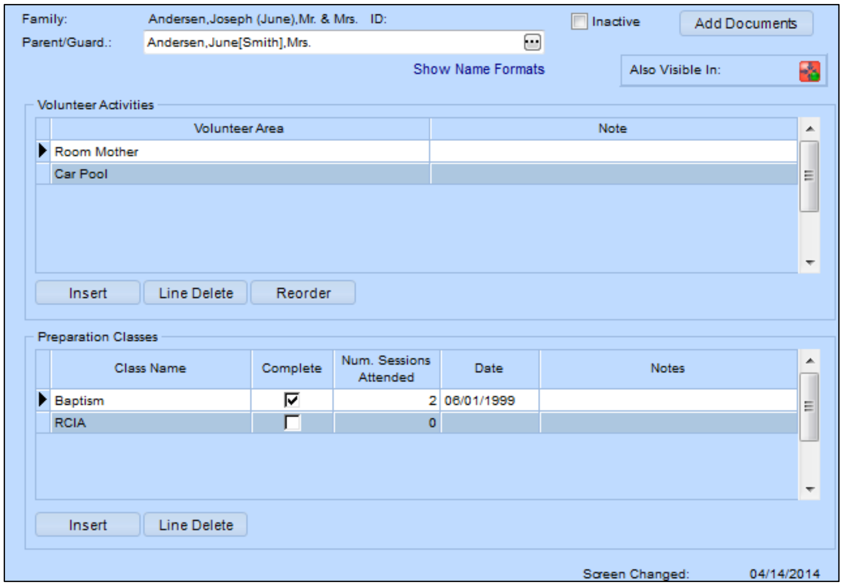


Fig. 3-11.

To insert volunteer areas or preparation classes

1. Locate the appropriate parent or guardian record.
2. In the navigation pane, click **Volunteer/Prep Classes**.
3. Below each grid, click **Insert**, then enter the parent/guardian's volunteer area or preparation class. You can also select one from the drop-down list.
4. Enter any additional information.
5. Click **Save**.

About Safe Environment

In the Safe Environment window, you can track any background checks or other requirements necessary for the individual to be around or work with children. In the navigation pane, click **Safe Environment**.

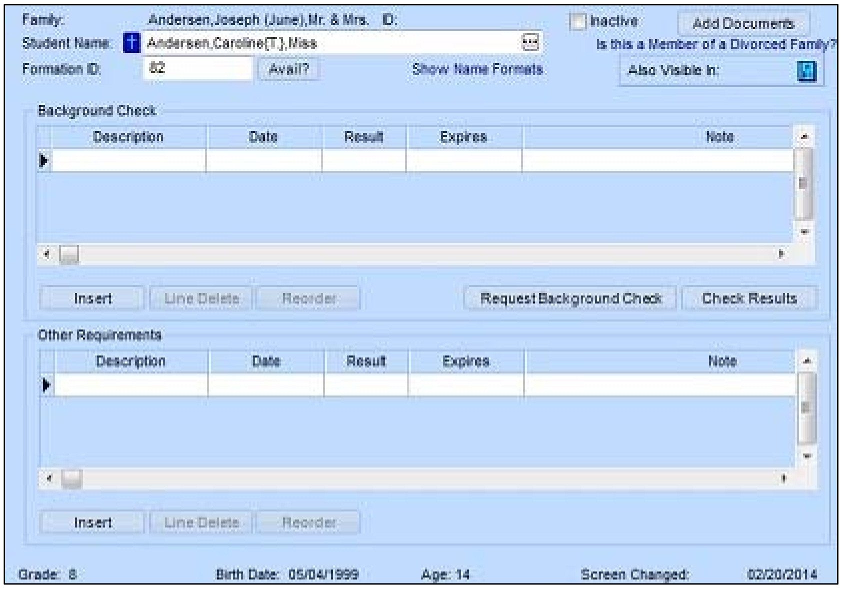


Fig. 3-12.

In the top portion of this window, enter information acquired when doing background checks such as federal, employment, and fingerprint background checks. In the bottom portion, enter any other requirements that must be met such as sensitivity training, reference letters, etc.

Useful Information

- The Background Check **Description** field uses entries from the Background Check Descriptions keyword list.
- The Other Requirements **Description** field uses entries from the Requirement Descriptions keyword list.
- The **Result** field uses a pre-defined list of terms.
- The **Note** field is an open remarks field that can contain up to 50 characters of information.

We partner with SecureSearch™ to provide background screening results for individuals in your parish, such as personnel or volunteers.

Useful Information

To use this feature, you must create an account with SecureSearch. Complete the SecureSearch Agreement for Service and fax it to 1-866-552-7326.

For more information, visit www.parishdata.com/backgroundchecks.

Once you have an account, you can manage an individual's background checks in the Safe Environment section where you can:

- Request a background check for an individual.
- Receive the background check results from SecureSearch.
- Enter additional legal requirements.

You can purchase individual background checks from within your PDS program.

To run a background check

1. Locate the individual's record.
2. In the navigation pane, click **Safe Environment**.
3. Click **Request Background Check**, and log in to the service.
4. Products and prices are listed. Select the options you want, enter the required information, and click **Submit**.
5. Close the background check window.
6. Click **Check Results** to see if your results have been received.

Keeping Track of Parent/Guardian Letters, Visits, Etc.

You can track outgoing and incoming correspondence such as letters and emails, phone calls, and visits. To keep track of correspondence with an individual, in the navigation pane, click **Letters, Visits, Etc**.

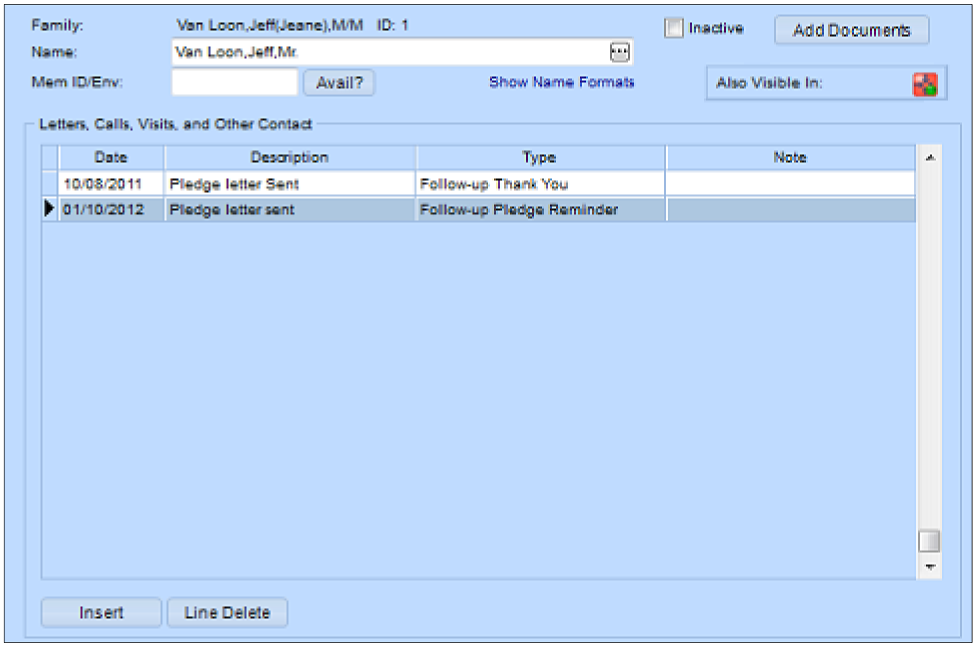


Fig. 3-13.

To keep track of parent/guardian correspondence

1. Locate the record of the individual.
2. In the navigation pane, click **Letters, Visits, Etc**.
3. Click **Insert**, and enter information about the correspondence.

Useful Information

You can enter up to 30 characters in each field.
Some examples of what you can enter in the Description field include "Schedule Letter", "Event Calendar", or "Confirmation Certificate".
The Type field uses entries from the Letter Types keyword list.

4. Click **Save**.

When you run a letter report or send an email to a parent/guardian, the program asks if you want to log a history of the letter correspondence. For more information about logging letters, see Logging Letters in the Reports chapter of this training guide.

Using the Navigation Tools to Locate Parents & Guardians

Use the **Navigation** tools to locate or scroll through parent/guardian records.

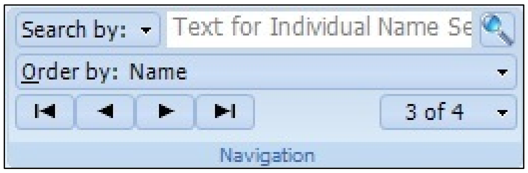


Fig. 3-14.

To scroll through parent/guardian records, click or . To jump to the first or last parent/guardian, click or . To change the order of records, select an option in the **Order by** drop-down list.

To display a list of individuals in the current family, click . This button depends on the number of members in the family. Click a member to go directly to their record.

To locate a particular individual, in the **Search** field, enter their name and press **Enter**, or click . If the name has a special character, right-click in the **Search** field and click **Insert Symbol**.

In the **Search By** drop-down list, select an option to search by.

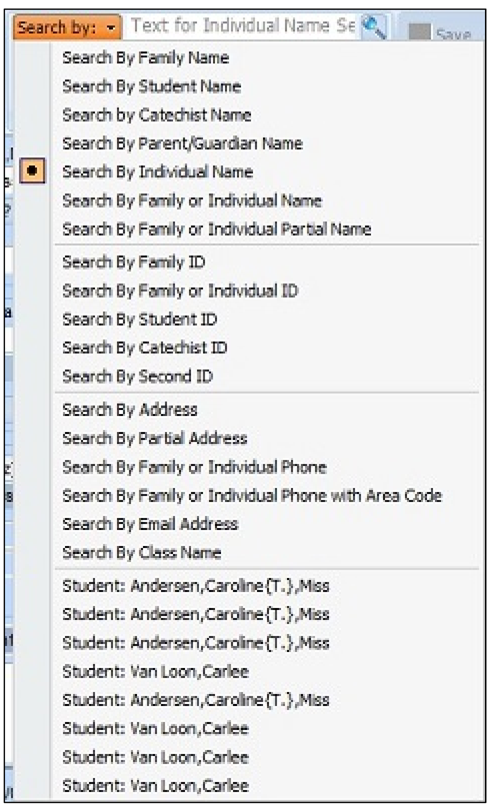


Fig. 3-15.

If you select an option that could return multiple individuals, such as **Search By Partial Address**, the program displays a list of matching individuals. From that list, select the individual you want to view.

The bottom of the **Search By** drop-down list displays recently accessed families and individuals. Select one of these families or individuals to return to their record.

Parent/Guardian Tasks

In the **Tasks** group, you can save or cancel changes to the window, or add or delete parents/guardians.

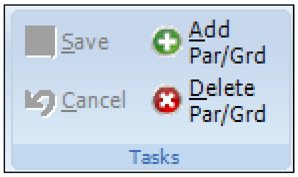


Fig. 3-16.

Save

To save all changes to the current parent/guardian, click **Save**. The program automatically saves the current record when you do the following:

- Navigate to a different parent/guardian.
- Add a new parent/guardian.
- Switch between any of the sections in the navigation pane.
- Leave the Parents & Guardians window.
- Exit the program.

Cancel

To cancel any changes made since the last save, click **Cancel**.

Add Parents & Guardians

To add a new parent/guardian, click **Add Par/Grd**. If there are members for this family available in the database, but not visible in Formation Office, you have the opportunity to select them.

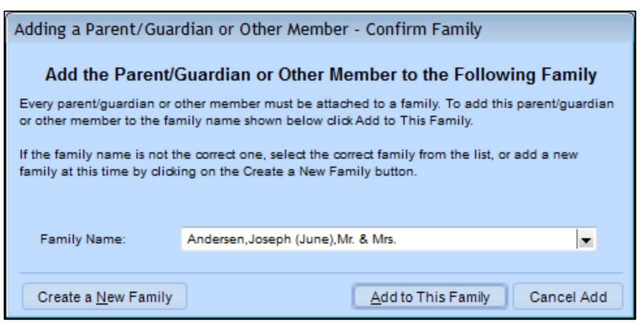


Fig. 3-17.

Add to This Family — If the individual's family already exists in the program, select it in the drop-down list, then click this button.

Create a New Family — If the individual's family does not exist in the program, click this button to add it. For more information, see the About Families chapter of this training guide.

Delete Parents & Guardians

To delete the current parent/guardian, click **Delete Par/Grd**. The program displays a confirmation dialog box and a print dialog box. If the individual is not used by another program, you can either hide them in the database or permanently delete them.

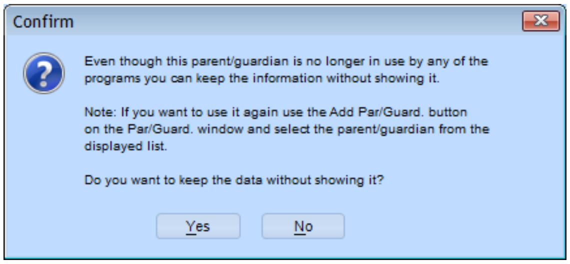


Fig. 3-18.

Reassigning a Parent or Guardian

You may need to reassign a parent or guardian to another family. For example, if a student's parents separate, divorce, or no longer live together, you can reassign one parent to a new family while retaining the connection to their student's record.

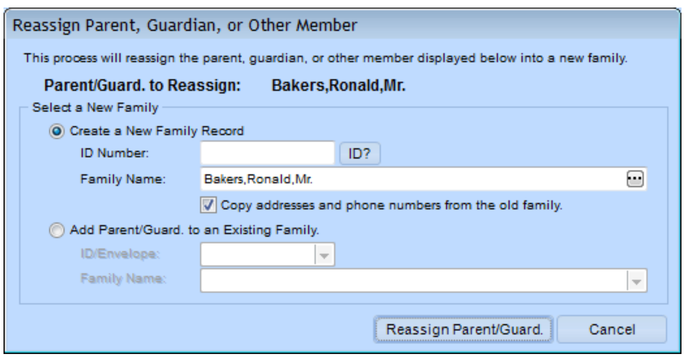


Fig. 3-19.

To reassign a parent or guardian

1. Locate the appropriate record.
2. In the navigation pane, click **Reassign Par/Guard**.
3. Select whether to create a new family record or add the parent/guardian to an existing family.
4. If you create a new family, select whether to copy addresses and phone numbers.
5. Enter or select the ID number and family name.
6. Make any additional selections, and when you're finished, click **Reassign Parent/Guard**.

Exercise

Fill out the information on the Parent/Guardian windows for the family you created in exercise #1.

Questions

Q: What is the difference between a talent, a ministry, and a keyword?

A: ____

____

____

Q: Where would you record a parent's attendance to a Sensitivity Training seminar?

A: ____

Q: Where do you record a parent's attendance to classes associated with their student's sacraments?

A: ____

4: Managing Class Schedules

In the Class Schedules window, you can enter and maintain important information relevant to the daily, weekly, and monthly activities associated with formation sessions. You can track important class information, such as who is the catechist for the class, class starting and ending dates, room number/name, frequency, and minimum attendance required.

A session refers to each class your students could attend as part of their religious education. If there are more students than can fit in one class, or if the classes are held on different days, it would be divided into two or more separate sessions.

To manage your class schedules, on the Information tab, click **Class Schedules**.

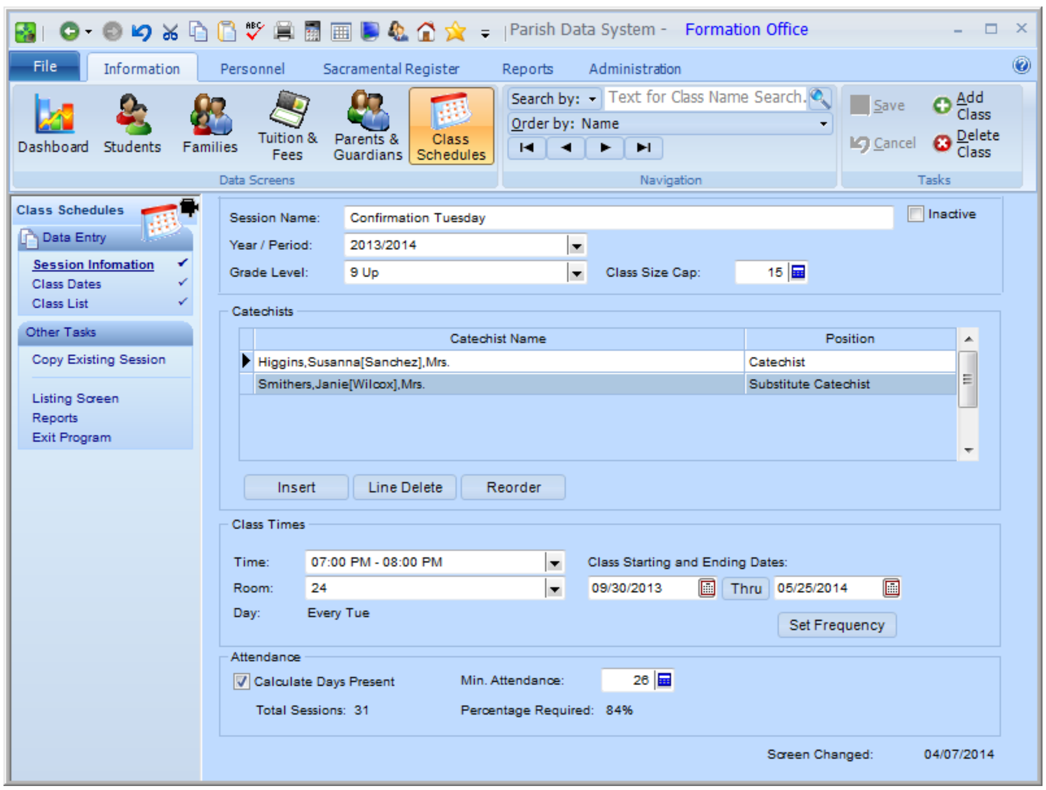


Fig. 4-1.

To add a class or session

1. In the Tasks group, click **Add Class**.
2. In the navigation pane, click **Session Information**.
3. Enter **a Session Name**, **Year/Period**, **Grade Level**, and **Class Size Cap**.
4. Below the Catechists grid, click **Insert** to add a catechist to the session.
5. Enter the **Class Time**, **Room Number/Name**, and the **Starting and Ending Dates**.
6. Click **Set Frequency** and specify the schedule frequency. Once you select the frequency, click **Add to Class Dates**. The program calculates the actual days within the date range chosen for the frequency chosen, and lists them on the Class Dates tab.
7. Select **Calculate Days Present** to have the program count how many days the class will meet, based on the frequency.
8. For **Min. Attendance**, enter the minimum number of days a student must attend in order to pass.

9. In the navigation pane, click **Class Dates**. Verify the class dates and specify any additional information.
10. When you're finished entering class/session information, click **Save**.

> **Useful Information**
>
> Students are NOT added to their sessions from the Class Schedules window. You can add sessions for a student on the Students Detail window. You can add sessions for multiple students at once by using the Classes or Sessions quick posting or the Enrollment process.

There is no limit on the number of sessions you can maintain in the Formation program; however, each class session must have a unique **Session Name**.

For example, let’s say you have 120 students that need to attend a First Communion or Eucharist class. You have two times available, 9am and 11am. Each of your rooms can hold only twenty students. In this case, you would have six First Communion sessions: 9am 1st Communion A, 9am 1st Communion B, 9am 1st Communion C, 11am 1st Communion A, 11am 1st Communion B, and 11am 1st Communion C.

Note: The number of students, times, and room capacity used above is just an example. There is no limit on the number of students that can be assigned to a class/session.

Year/Period is a keyword field that represents the year for the session. For example, you can have a 1st Grade Formation session for the period of 2014/2015 and then setup another 1st Grade Formation session for the period of 2015/2016. This way, you can enroll your pre-registering students in the current year for the next year.

Grade Level is a keyword field that represents the public school grade that corresponds to this session. For example, 1st Communion is usually 1st graders.

Class Frequency

How often a session meets within the starting and ending times is determined by the frequency. When you click **Set Frequency**, you can choose whether the class meets **Daily, Weekly**, by **Date of the Month**, or by **Day of the Month**.

Daily

Use the **Daily** option to schedule a session for every day up to every sixth day of the time period specified.

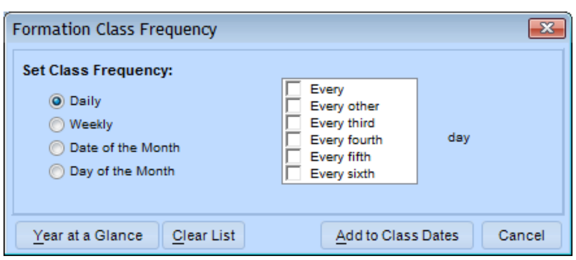


Fig. 4-2.

Weekly

Use the **Weekly** option to schedule a session for particular days of the week; for example, every other Monday, or every fourth Wednesday and Thursday.

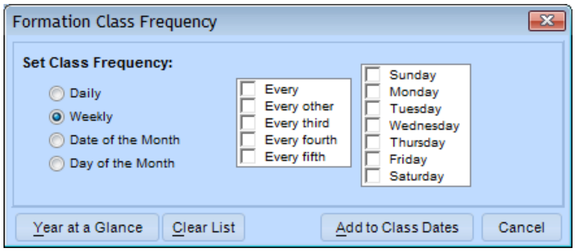


Fig. 4-3.

Date of the Month

Use the **Date of the Month** option to schedule a session for a specifically-numbered date of the month; for example, the 3rd, 7th, and 15th of each month.

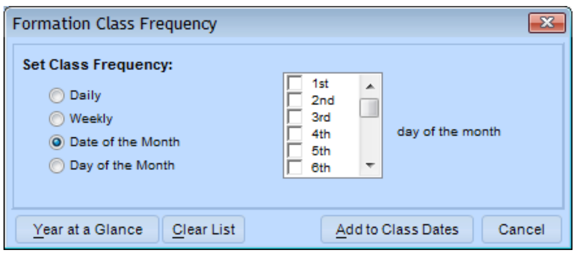


Fig. 4-4.

Day of the Month

Use the **Day of the Month** option to schedule a session for the selected recurring days of the week within a month; for example, the first and third Sunday and Tuesday of the month.

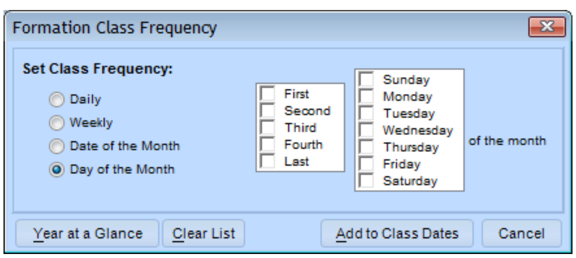


Fig. 4-5.

Class Dates

The **Class Dates** window shows the classes calculated by the **Frequency** and **Date Range** you selected on the Session Information window.

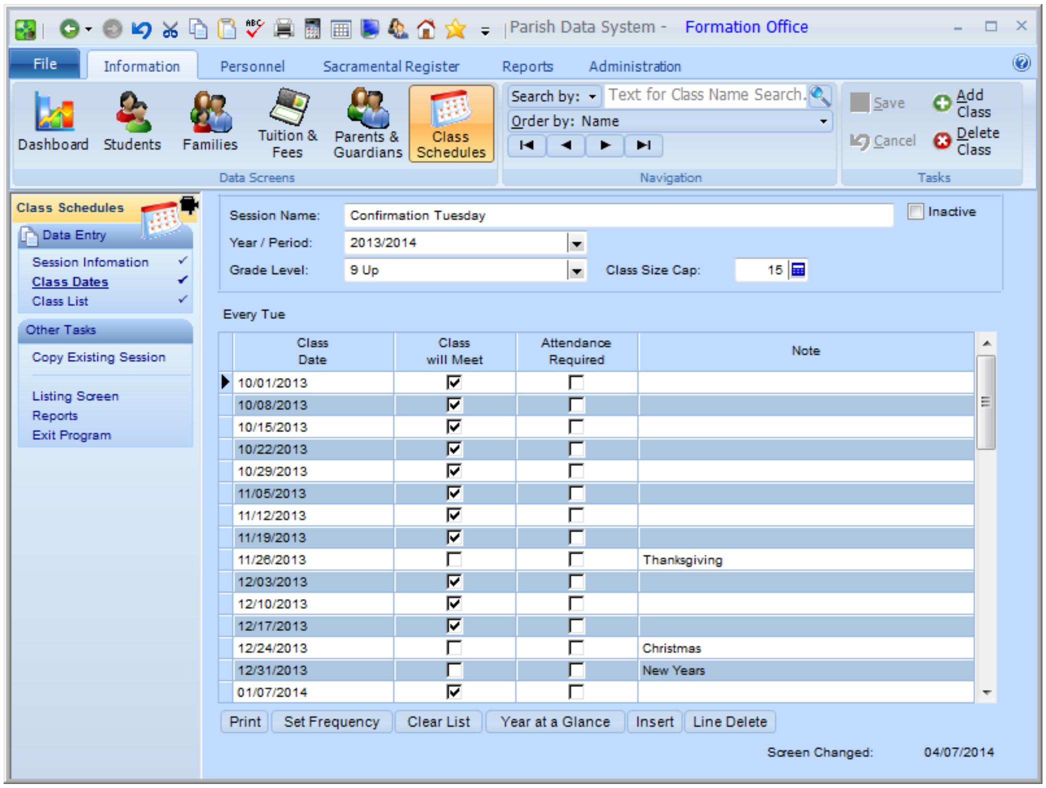


Fig. 4-6.

Class Will Meet is automatically selected for each date, indicating that class should meet on that day. Clear this check box if class will not meet that day; for example, if it's a holiday.

Attendance Required is unselected for each date. Select this for a specific date if attendance on that day is crucial to passing the class or for another important reason. The Attendance calculations on the Session Information window depend on these checkboxes. A student marked absent for a date marked as **Attendance Required** appears red on the Students Attendance window.

Note can be used to show why the class does not meet that day, such as a holiday, or why attendance is required, such as a final exam.

Click **Set Frequency** to recalculate the dates, or click **Clear List** to start the list over. Click **Insert** to add additional dates.

Class List

The Class List window shows the students assigned to the current session.

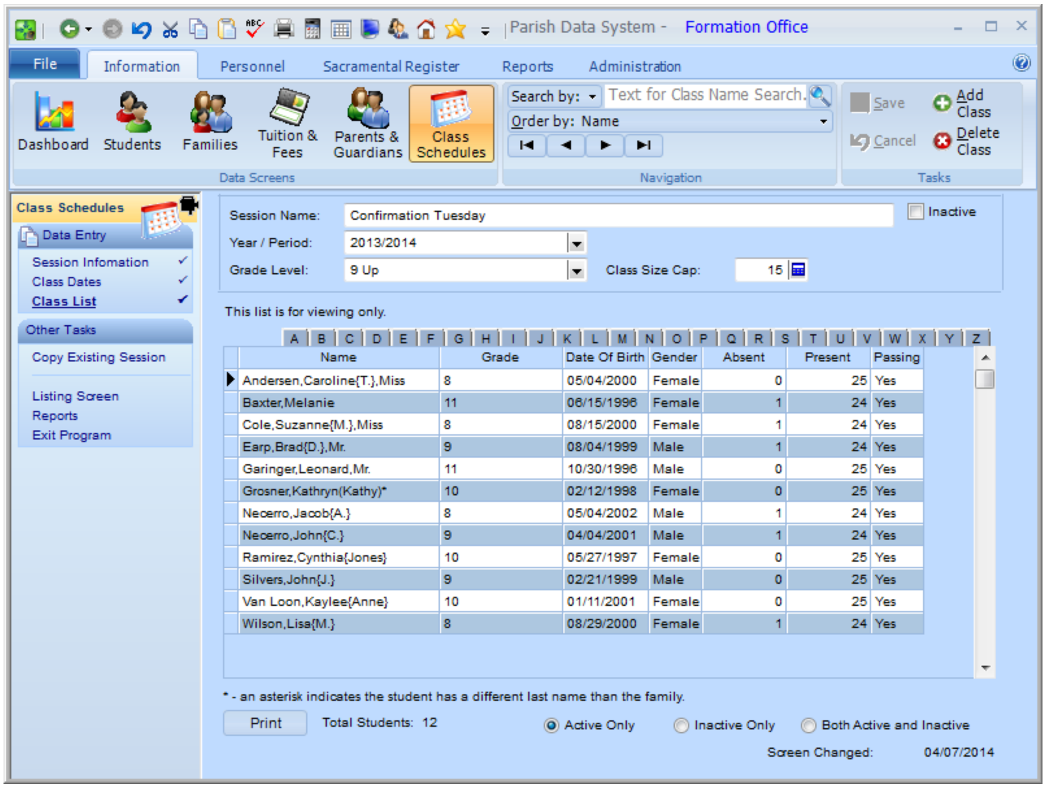


Fig. 4-7.

Adding Students to Sessions

Students are ***NOT*** added to their sessions from the Class Schedules window or the Class List window.

To add a session to an individual student

1. On the Information tab, click **Students**.
2. In the navigation pane, click **Detail**.
3. In the List of Session section, click **Insert**.
4. To add a session to several students at the same time, in the navigation pane, click **Quick Posting > Classes or Sessions** or click **Processes > Enrollment**.

Copy Existing Session

The Copy Existing Schedule feature allows you to create a new session by copying an existing schedule. Then you can make the appropriate changes for the new session.

For example, all of your classes meet on Tuesday night. You would create a session for the first class, including dates, frequency, and time, then copy it and change the session name, catechist, etc.

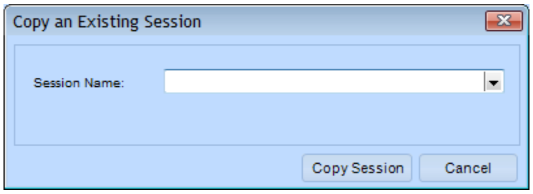


Fig. 4-8.

To create a class or session based on an existing schedule

1. In the navigation pane, click **Copy Existing Schedule**.
2. Select the class/session you want to copy, and click **Copy Session**.
3. A new class/session named "Copy of <session>" is created. Make any changes to the new class/session.
4. Rename the class/session, and click **Save**.

Exercise

Create a session with the following:

Name: Learning the Saints

Year/Period: 2015/2016

Grade Level: 5th grade.

Time: from 7pm to 9pm

Room: Classroom 101

Date Range: September through April

Frequency: Every Third Wednesday of the Month

5: About Personnel

The Personnel tab provides access to data windows where you can maintain all of the information about your catechists, staff, clergy and religious, and volunteers.

All Personnel

The All Personnel windows display information about all parish personnel records stored within the program. To access all of your personnel records, on the Personnel tab, click **All Personnel**.

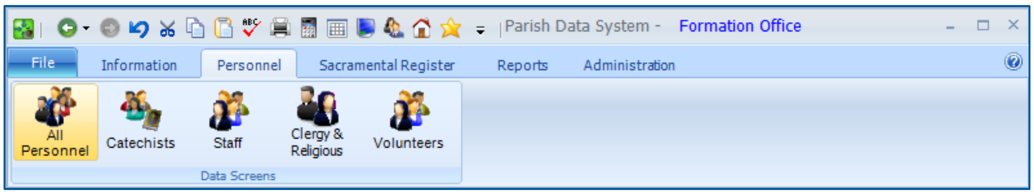


Fig. 5-1.

Using the Navigation Tools to Locate Personnel

Use the **Navigation** tools to locate or scroll through personnel records.

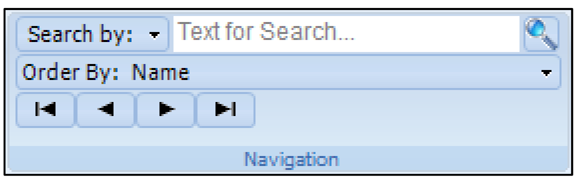


Fig. 5-2.

To search for a specific record

1. On the Personnel tab, click All Personnel, Catechists, Staff, Clergy & Religious or Volunteers.
2. In the appropriate data window, on the ribbon, locate the Navigation group.
3. Click **Search by**, and select the type of record for which you are searching.
4. Click in the field next to the **Search by** button and begin typing the name, ID number, phone number, or email address of the record that you want to locate.

> **Useful Information**
>
> If searching for a name, the program displays possible matches as you type in the field. If you enter a comma, your cursor moves to the end of the last name selected.

5. Once you enter the correct value, click to display the record. Alternatively, click the drop-down arrow on the right side of the field and select a record.

To scroll through the records

1. In the appropriate data window, on the ribbon, locate the Navigation group.
2. Click the **Order by** drop-down list and select a method of organizing the records. If, for instance, you select to order by name, you can scroll through the records alphabetically based on last names.
3. Click and to move to the previous or next record. Click and to move to the first or last record.

Catechists

The Catechists windows display information about all catechist records stored within the program. To access catechist information, on the Personnel tab, click **Catechists**.

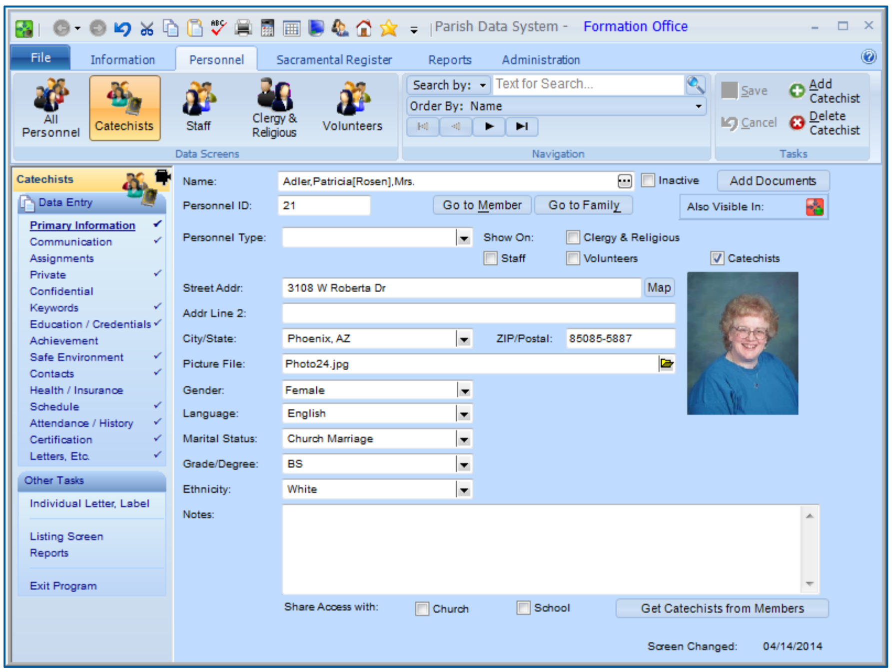


Fig. 5-3.

Staff

The Staff windows display information about all staff records stored within the program. To access staff information, on the Personnel tab, click **Staff**.

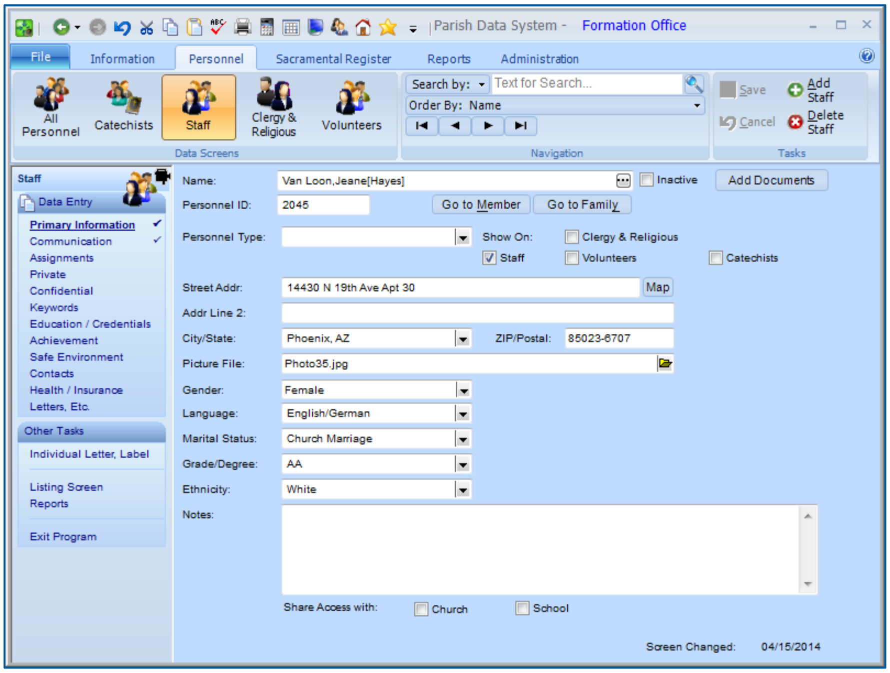


Fig. 5-4.

Clergy and Religious

The Clergy & Religious windows display information about all clergy records stored within the program. To access information for clergy, on the Personnel tab, click **Clergy & Religious**.

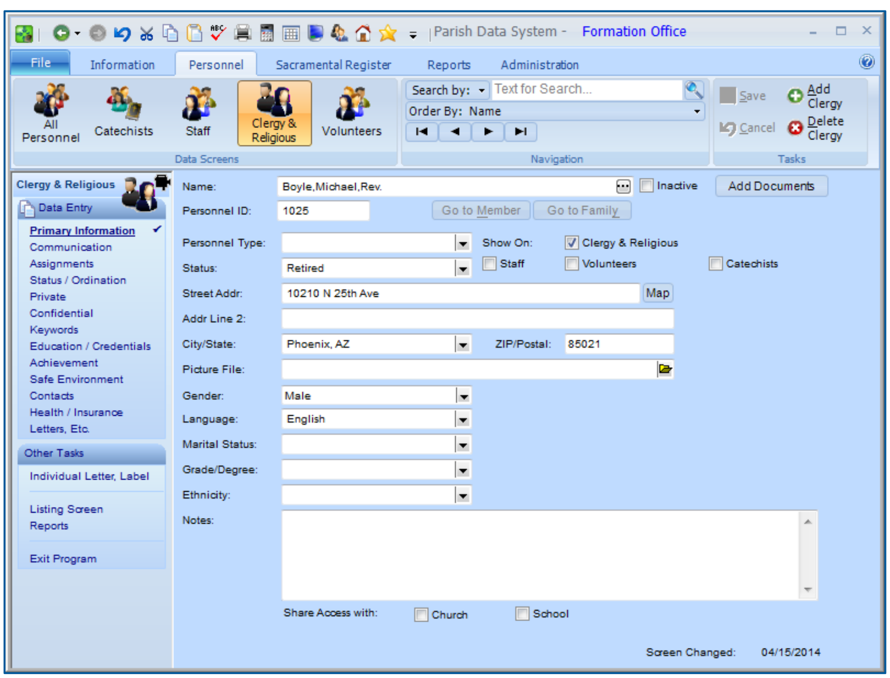


Fig. 5-5.

Volunteers

The Volunteers windows display information about all volunteer records stored within the program. To access volunteer information, on the Personnel tab, click **Volunteers**.

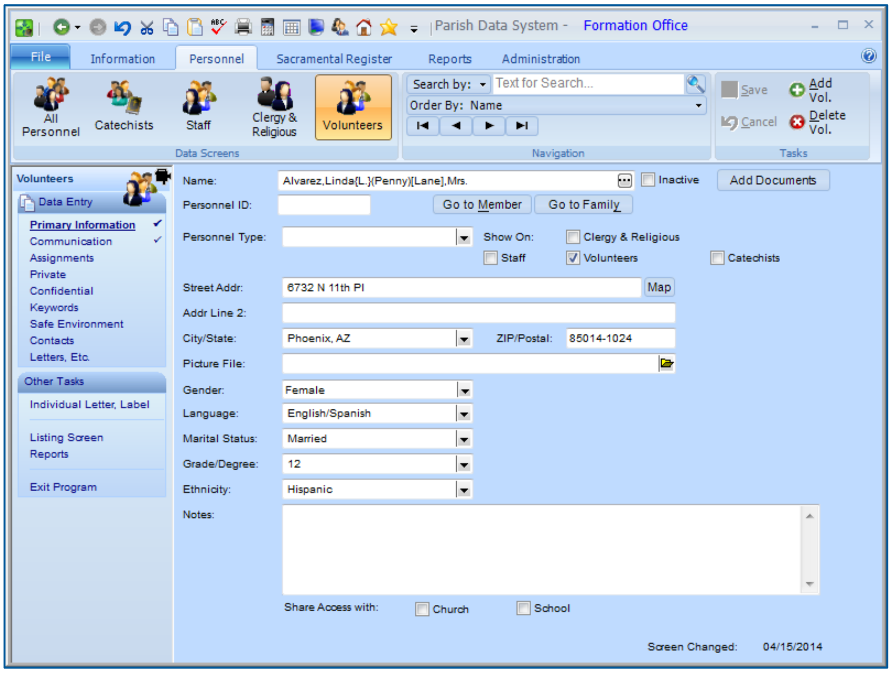


Fig. 5-6.

Adding and Editing Personnel Records

You can add or edit personnel records by navigating to **Personnel** > **All Personnel**, or select the data window for the type of personnel you are adding (**Catechists**, **Staff**, **Clergy & Religious**, or **Volunteers**).

To add a personnel record

1. In the Tasks group, click the **Add** button. The Primary Information window displays.
2. Enter the name and ID number.
3. Enter any additional record details, and select the program areas where you want this record to display.
4. Click **Save**.

To insert personnel pictures

1. Locate the appropriate personnel record.
2. In the navigation pane, click **Primary Information**.
3. In the **Picture File** field, click  and locate the individual's digital image file.

> **Useful Information**
>
> You must use one of the following file types: .gif, .jpg, .jpeg, .bmp, .emf, .wmf, or .ico.

4. Select the file, and click **Open**.
5. Click **Save**.

Useful Information

Personnel pictures can be installed as a sub-directory of your Data folder. The default path to this sub-directory is **\PDSOffice\Data\Pictures**. If you save pictures to this directory, they are backed up each time the program makes an automatic backup. Because picture files are large, they take up more space on your hard drive and make the backup files larger than ordinary text files. If backing up large files is a concern, consider creating a sub-directory outside the PDS program folder in which to store your picture files. They are no longer backed up automatically since they are not in the pictures sub-directory. In this case, you can back them up manually.

Entering Personnel Communication

You can enter information for different ways to communicate with your formation's personnel. On the Personnel tab, click the type of personnel you want to enter information for. In the navigation pane, click **Communication**.

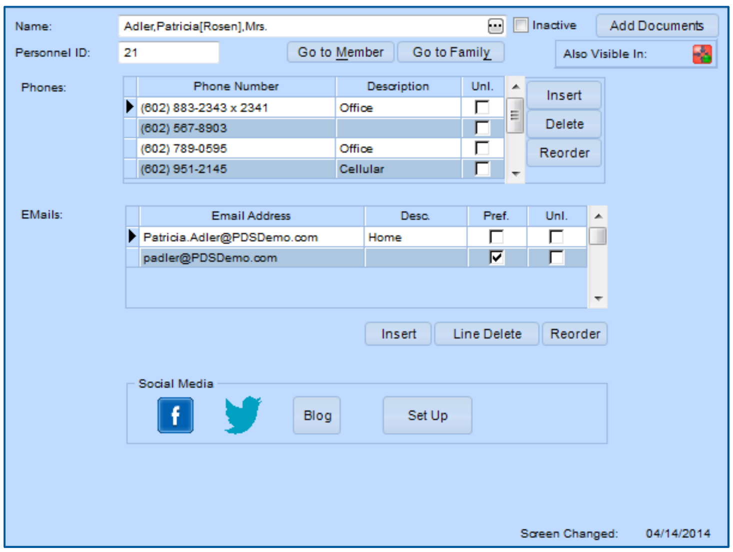


Fig. 5-7.

To insert a phone number or email address

1. Locate the appropriate individual.
2. In the navigation pane, click **Communication**.
3. Click **Insert** below each grid, and enter the individual's phone number(s) and/or email address(es).
4. If the phone number or email address is unlisted, select **Unl**.
5. If the individual prefers to receive email rather than mail, select **Pref**.
6. Click **Save**.

You can also include a link to quickly access an individual's Facebook, Twitter, or blog page from within the program.

Fig. 5-8.

To set up links to social media

1. Locate the appropriate individual.
2. In the navigation pane, click **Communication**.
3. In the Social Media section, click **Set Up**. Copy the URL from the individual's Facebook, Twitter, or blog, and paste it into the appropriate field. Click **Save/OK**.
4. In the Tasks group, click **Save**.

After you set up the links, in the Communication window, click the icon of the social media page you want to view. The webpage opens in your Internet browser.

Adding Assignments

You can assign certain positions to personnel, and enter relevant salary information and date ranges associated with that position. On the Personnel tab, click the type of personnel you want to enter information for. In the navigation pane, click **Assignments**.

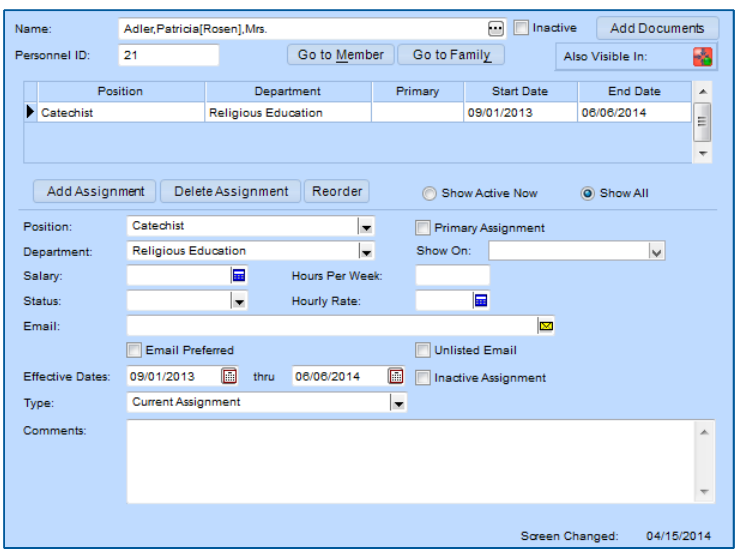


Fig. 5-9.

To add a personnel assignment

1. Locate the personnel record you want to add assignments to.
2. In the navigation pane, click **Assignments**.
3. Click **Add Assignment**.
4. Enter or select any information you want to include.
5. Click **Save**.

Entering Private and Confidential Information

You can enter private and confidential information on personnel records. Private information includes citizenship status, Social Security number, birth date, hire date, termination date (if applicable), and more. You can enter any other confidential information you want to include in the Confidential window.

To enter private information

1. Locate the personnel record you want to add information to.
2. In the navigation pane, click **Private**.
3. Enter any information you want to include.

> **Useful Information**
>
> You can set each user's access rights to this information on the Administration tab, under Users & Passwords. There is a program area for Private Window and for Social Security Number.

4. Click **Save**.

To enter confidential information

1. Locate the personnel record you want to add information to.
2. In the navigation pane, click **Confidential**.
3. Enter any information you want to include.
4. Select **Very Confidential** if you want to restrict the information to only users who have rights to very confidential information.

> **Useful Information**
>
> You can set each user's access rights to this information on the Administration tab, under Users & Passwords. There is a program area for Confidential and for Very Confidential.

5. Click **Save**.

Associating a Keyword with Personnel

You can associate a keyword with personnel. For example, if a catechist is also a youth group chaperon, you can "tag" them as such.

Fig. 5-10.

To associate a keyword with personnel

1. Locate the appropriate personnel record.
2. In the navigation pane, click **Keywords**.
3. Click **Insert** in the appropriate keywords list.
4. To select a keyword from a current list, click the drop-down list. To add a new entry, enter a description, press **Tab** on your keyboard, and click **Add to the List**.
5. Click **Save**.

You can use this keyword when running reports. For example, if you need a list of all the youth group chaperons, you can run a listing report with an additional selection as follows:

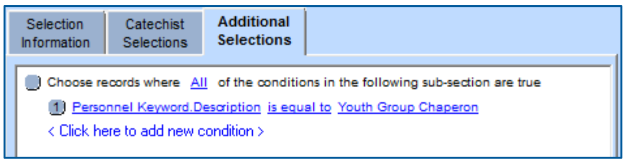


Fig. 5-11.

For more information on selections, refer to the Reports chapter of this training guide.

Entering Education and Credentials

You can enter information about a personnel's education and credentials. On the Personnel tab, click the type of personnel you want to enter information for. In the navigation pane, click **Education/Credentials**.

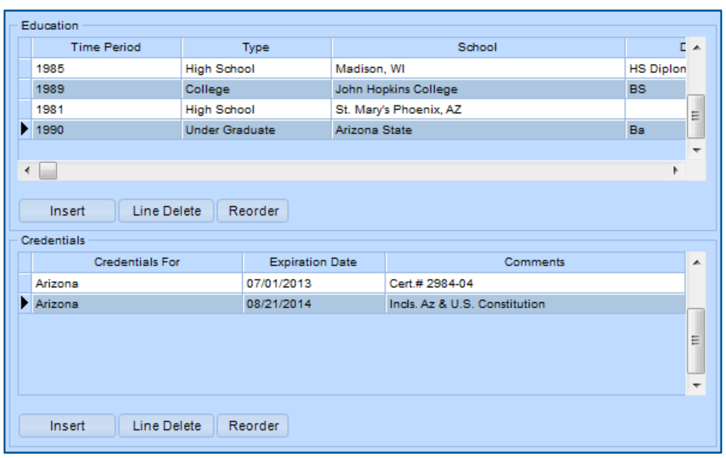


Fig. 5-12.

To enter information about education and credentials

1. Locate the appropriate personnel record.
2. In the navigation pane, click **Education/Credentials**.
3. To enter education details, click **Insert** below the Education grid.
4. To enter credential details, click **Insert** below the Credentials grid.
5. After entering all relevant information, click **Save**.

Adding Achievements

You can add achievements that your personnel have accomplished. For example, a teacher may receive the 2014 Teacher of the Year award.

On the Personnel tab, click the type of personnel you want to enter information for. In the navigation pane, click **Achievement**.

> **Useful Information**
>
> This window is not available in the Volunteers section.

To add an achievement

1. Locate the appropriate personnel record.
2. In the navigation pane, click **Achievement**.
3. Below the Achievements grid, click **Insert**.
4. Enter any achievement information you want to include.

> **Useful Information**
>
> You can set up types of achievements in the Achievement Types keyword list. On the File menu, click **Keywords** > **Personnel Keywords** > **Achievement Types**.

5. Click **Save**.

Managing Background Checks

We partner with SecureSearch™ to provide background screening results for individuals in your parish, such as personnel or volunteers.

> **Useful Information**
>
> To use this feature, you must create an account with SecureSearch. Complete the SecureSearch Agreement for Service and fax it to 1-866-552-7326.
>
> For more information, visit www.parishdata.com/backgroundchecks.

Once you have an account, you can manage an individual's background checks in the Safe Environment section where you can:

- Request a background check for an individual
- Receive the background check results from SecureSearch
- Enter additional legal requirements

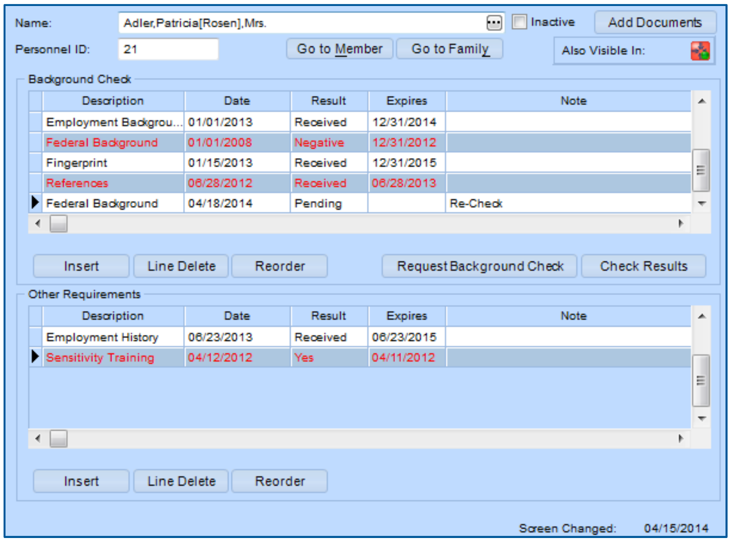


Fig. 5-13.

To add background check information or requirements

1. Locate the individual's record.
2. In the navigation pane, click **Safe Environment**.
3. Under Background Check or Other Requirements, click **Insert**, and enter the background check or requirements information.

> **Useful Information**
>
> These lists use entries from the Background Check and Requirement Descriptions keyword lists.

4. Click **Save**.

You can purchase individual background checks from within your PDS program.

To run a background check

1. Locate the individual's record.
2. In the navigation pane, click **Safe Environment**.
3. Click **Request Background Check**, and log in to the service.
4. Products and prices are listed. Select the options you want, enter the required information, and click **Submit**.
5. Close the background check window.
6. Click **Check Results** to see if your results have been received.

Adding Contacts

You can add information about a personnel's contacts. This can include any family members, friends, doctors, and so on.

On the Personnel tab, click the type of personnel you want to enter information for. In the navigation pane, click **Contacts**.

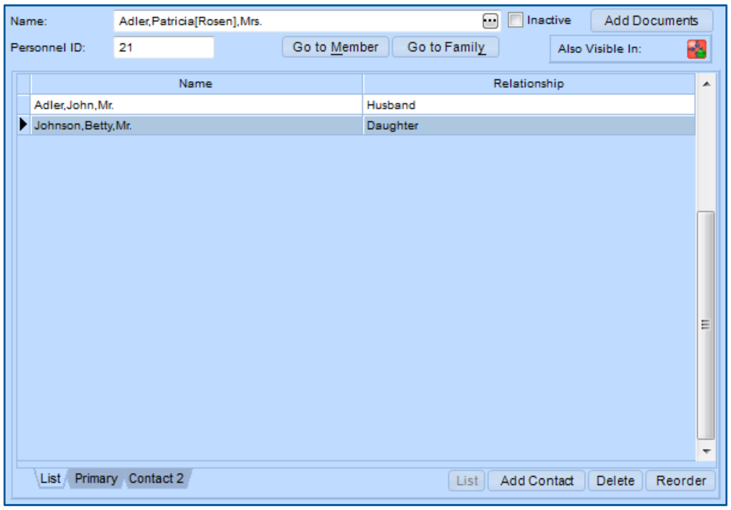


Fig. 5-14.

To add a personnel contact

1. Locate the personnel record you want to add information to.
2. In the navigation pane, click **Contacts**.
3. Click **Add Contact**.
4. Enter any information you want to include.
5. Click **Save**.

As you add contacts, a tab displays at the bottom for each contact. Click **List** to see all the personnel's contacts.

Entering Health and Insurance Information

You can add health and insurance information for your personnel. On the Personnel tab, click the type of personnel you want to add information for. In the navigation pane, click **Health/Insurance**.

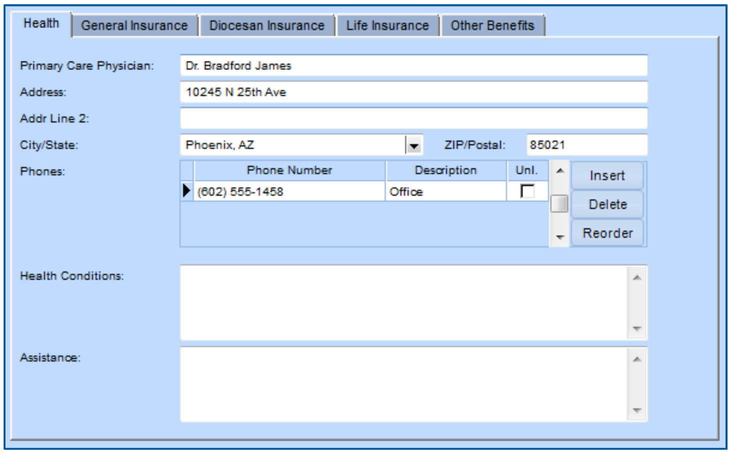


Fig. 5-15.

Useful Information

This window is not available in the Volunteers section.

To add health and insurance information

1. Locate the personnel record you want to add information to.
2. In the navigation pane, click **Health/Insurance**.
3. On each tab, enter the relevant information.

   Useful Information

   You can set up custom benefit names that display on the Other Benefits tab. On the File menu, click **Setup** > **Initial Setup**. Click the **Personnel** tab, and enter the benefit names. Click **Save/OK**.

4. When you're finished adding information, in the Tasks group, click **Save**.

Scheduling Catechists

You can add or edit catechist schedules. On the Personnel tab, click **Catechists**. In the navigation pane, click **Schedule**.

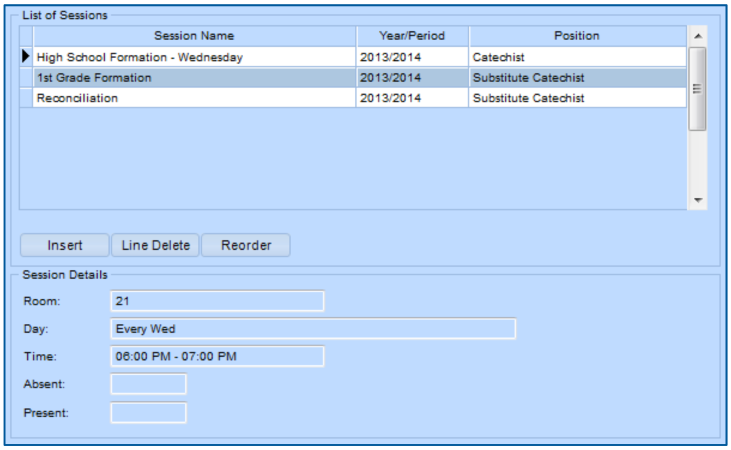


Fig. 5-16.

To add sessions to a schedule

1. Locate the catechist you want to add or edit a schedule for.
2. In the navigation pane, click **Schedule**.
3. Click **Insert**, and enter the session information.
4. Insert a new line for each session you want to add.
5. Click **Save**.

To delete sessions from a schedule

1. Locate the catechist whose schedule you want to delete.
2. In the navigation pane, click **Schedule**.
3. Select the session you want to delete, and click **Line Delete**.
4. Click **Save**.

Entering Catechist Attendance Information

You can track the days a catechist is absent, present, excused, unexcused, or tardy to class. You can also track a single attendance type, such as *Absent*, or you can track a combination of types.

On the Personnel tab, click **Catechists**. In the navigation pane, click **Attendance/History**.

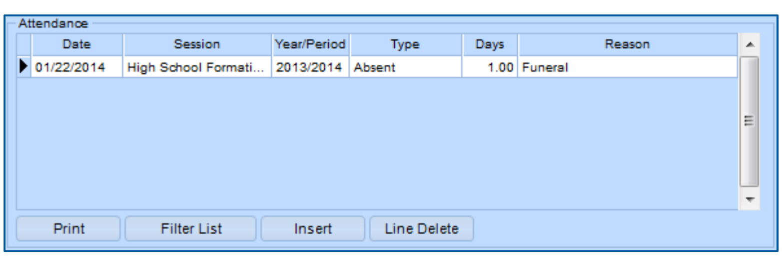


Fig. 5-17.

To insert attendance information

1. Locate the appropriate catechist record.
2. In the navigation pane, click **Attendance/History**.
3. In the Attendance grid, click **Insert**.
4. Enter any information you want to include.
5. Click **Save**.

Date — The catechist was present, absent, tardy, excused, or unexcused. Click the calendar icon to select the date.

Type — The kind of absence, tardy, or excuse the catechist had for that day or days. You cannot add new types to this list.

Days — The number of days the catechist was absent or tardy. If you're recording each day individually, enter 1 in the Days field. If you're recording the beginning date for a number of days absent or tardy in a single row, enter the total number of days absent or tardy in the Days field. For example, if the catechist is absent from 01/01/06 to 01/06/06, you would enter 5 in the Days field.

To view filtered attendance information

1. Locate the appropriate catechist record.
2. In the navigation pane, click **Attendance/History**.
3. Click **Filter List**.
4. Make your filtering selections, and click **Lookup/OK** to run the filter.

Useful Information

The lines displayed are narrowed to match your choices. Click **Filter Chosen**, and **Clear Filter** to restore the list.

Entering Catechist History Information

You can view the catechist's teaching history.

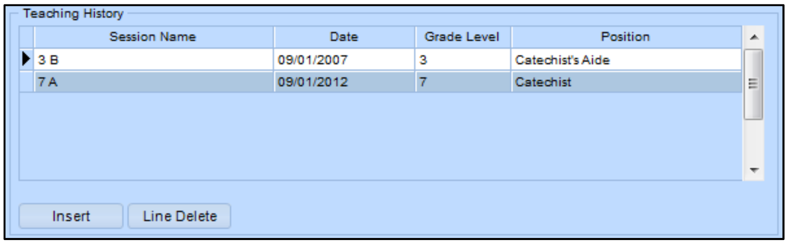


Fig. 5-18.

1. Locate the appropriate catechist record.
2. In the navigation pane, click **Attendance/History**.
3. In the History grid, click **Insert**.
4. Enter any information you want to include.
5. Click **Save**.

> **Useful Information**
>
> The **End of Year – Formation Remove Advance** process has an option to help you add the catechists' session details at the end of the year to their Teaching History record.
>
> To access this process on the Information tab, click **Students**. In the navigation pane, click **Processes > End of Year – Formation Remove Advance**. For more details on this process, refer to the Processes chapter of this training guide.

Entering Catechist Certification Information

You can record catechist's educational requirements pertaining to their background and training. On the Personnel tab, click **Catechists**. In the navigation pane, click **Certification**.

To insert a course

1. Locate the appropriate catechist.
2. In the navigation pane, click **Certification**.
3. Click a Level tab or the Renewal tab, and click the side tab that corresponds to the type of course you want to insert.
4. Click **Insert**, and select the information for each column.

> **Useful Information**
>
> You can set up courses and requirements on the Certification Requirements window. On the File menu, click **Setup > Certification Requirements**. See the next section for more information.

5. Click **Save**.

To get pre-existing requirements for a course

1. Locate the appropriate catechist.
2. In the navigation pane, click **Certification**.
3. Click a Level tab or the Renewal tab, and click the appropriate side tab.
4. Click **Get Requirements**. A confirmation dialog box displays.
5. Click **Remove Classes** to have all of the existing classes removed and replaced with those set up on the Certification Requirements dialog. Otherwise, you can click **Keep Classes** or **Stop**.
6. Click **Save**.

On each **Level** tab, there are four side tabs. The **Recap** side tab contains a brief summary of certification information located on the **Level** tabs. The other side tabs are **Required Courses**, **Elective Courses**, and **Other**. These tabs display information about courses a catechist must complete in order to achieve the level.

<u>**Recap tab**</u>

- **Level** — Indicates Level I - IV for the requirements. The Details in this Data check box is selected if the requirements for the certification have not been met.
- **Certified Yes/No** — Yes is entered in this field if the requirements for the certification have been met. No is entered if the requirements have not been met.
- **Date** — Enter the date (MM/DD/YYYY) the certification requirements were met, or click to select the date. If the requirements have not been met, the units needed for certification are listed instead. The units are calculated using entries on the Level tab.

<u>**Required Courses, Elective Courses, and Other side tabs**</u>

- **Course** — The name of the required course or electives. To set up the course list, on the File menu, click Setup > Certification Requirements.
- **Req. Met** — Indicates the certification requirement has been met. If all the check boxes are selected, the Recap side tab displays that the catechist is certified.
- **Date** — The date (MM/DD/YYYY) the course requirement was completed, or click to select the date.
- **Units** — The value of the required course in the units you use, for instance 3.00 to represent 3 hours, or click and enter the units using the calculator.
- **Alternate Course** — This information is optional. If the course was given another designation but is still part of the requirement, enter the name here.
- **Instructor** — This information is optional. Enter the name of the person conducting the course.
- **Place** — This information is optional. Enter the name of the place where the course was held.

Setting Catechist Certification Requirements

With this option, you can set up your Diocesan and other requirements for catechist certification. To access the Certification Requirements window, on the File menu, click **Setup** > **Certification Requirements**.

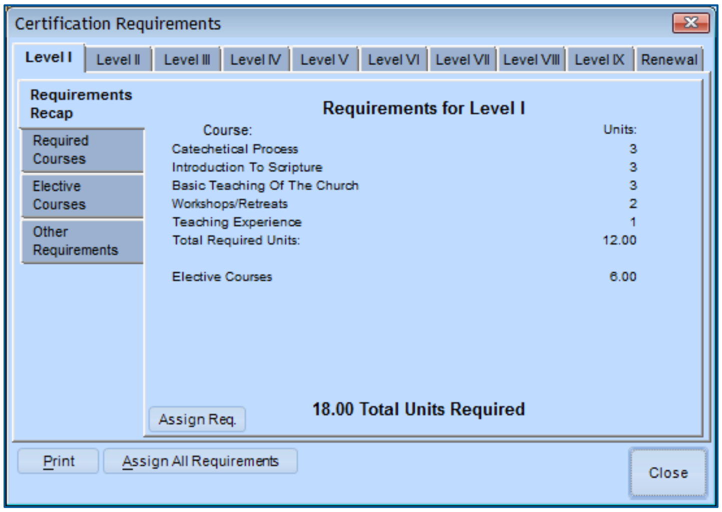


Fig. 5-19.

There are ten levels (I through IX and Renewal) available on the Certification Requirements window. Each level's tab contains these following side tabs:

- **Requirements Recap** — Lists all the required courses, elective courses, other requirements, and total units required for certification. The Recap window provides a summary of information on the status of all levels of certification. If you delete a course or requirement from this list, you can remove the course or requirement from all windows.
- **Required Courses** — Lists all the courses required for certification as defined by your organization.
- **Elective Course** — Lists all the courses that are not necessarily required for certification as defined by your organization.
- **Other Requirements** — Lists the other requirements needed as defined by your organization for certification. You can manually enter a course name and description.

To insert requirements

1. On the File menu, click **Setup** > **Certification Requirements**.
2. Select the level you want to insert a requirement for.
3. Click a side tab to insert either required courses, elective courses, or other requirements.
4. Click **Insert** and enter the requirement information.
5. Click **Save/OK**.

You can assign required courses, elective courses, and other requirements for a particular level. After you assign requirements, all catechists must complete the requirements before moving to the next level.

To assign requirements for a certain level

1. On the File menu, click **Setup** > **Certification Requirements**.
2. Select a Level tab or the Renewal tab.
3. To assign only the required courses, the elective courses, or the other requirements, click the corresponding side tab, and click **Assign Requirements**.
4. To assign all the requirements for the level, click **Requirements Recap**, and click **Assign Req**.

> **Useful Information**
>
> Requirements are also added to the Certification section of the Catechists window.

5. Click either **Remove Courses/Reqs** or **Keep Courses/Reqs** to remove or keep the existing requirements on the Certification window.

You can also add requirements for all requirement levels and courses to the Catechists window.

To assign requirements for all levels

1. On the File menu, click **Setup** > **Certification Requirements**.
2. At the bottom of the window, click **Assign All Requirements**.
3. Click either **Remove Requirements** or **Keep Requirements** to remove or keep the existing requirements on the Certification window.

You can use a list of courses from another certification level and add them to your current level.

To borrow a course

1. On the File menu, click **Setup** > **Certification Requirements**.
2. On the Elective Courses tab, click **Borrow**.
3. Select the certification level you want to borrow.
4. Click **Save/OK**.
5. After the list is inserted, click **Line Delete** to remove items that aren't needed.

Reorder — We recommend that you use Reorder to move more frequently used items to the beginning of the list instead of deleting the item completely.

Print — Print a summary of the certification requirements and units for all levels, and print a certification worksheet for the requirements levels. Use the worksheet to record units completed or to set up courses and units.

Entering Status and Ordination Information

In a clergy/religious record, you can enter status information as well as diaconate and priest ordination details. You can also record religious dates.

On the Personnel tab, click **Clergy & Religious**.

To enter status/ordination information

1. Locate the clergy/religious record you want to add information to.
2. In the navigation pane, click **Status/Ordination**.
3. On the tabs, enter relevant dates and information.
4. Click **Save**.

Deleting a Personnel Record

As personnel exit your parish, you may want to delete their records from your database. There may be times when you want to delete a personnel record, but not permanently. In that case, you can designate it **Inactive** using the check box in the upper-right corner of the window. The individual is omitted from most PDS processes, but their data is not lost.

You can delete personnel records by navigating to **Personnel** > **All Personnel,** or select the data screen for the type of personnel you are deleting (**Clergy & Religious**, **Staff & Volunteers**, **Teachers**, or **Catechists**).

To permanently delete a personnel record

1. Locate the personnel record you want to delete.
2. In the Tasks group, click the **Delete** button.
3. The Deleting Individual Information dialog box displays. If you want to print the personnel information, select the options you want, and click **Yes**.

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6: Adding and Viewing Documents

In several windows throughout the program, you can add and view additional documents that support the information you entered in those windows.

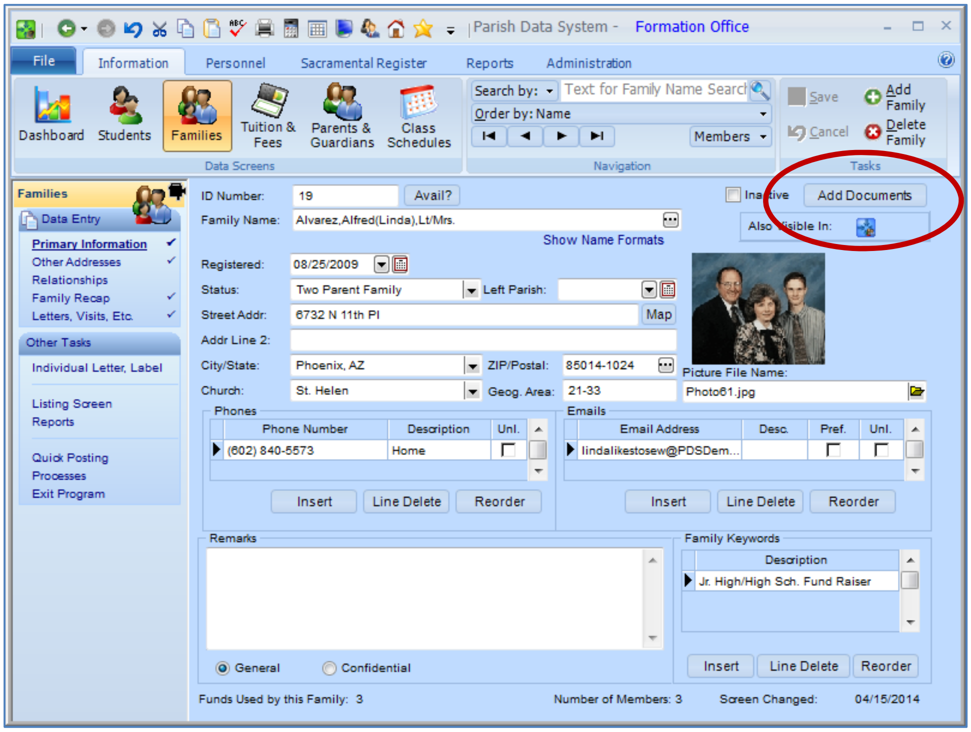

Fig. 6-1.

Useful Information

This feature is a file browser rather than a file manager. Within the program, you can link to a document on your computer or from your scanner to save it as a .bmp or .jpg image. Use the appropriate file editor to make changes to your document before associating it with a record in your PDS program.

Before using this feature, decide where you want to store the documents on your local PC or network.

To set where to store your documents

1. On the File menu, click **Setup > Initial Setup**.
2. Next to **Default Documents Subdirectory**, click **Browse** to select the location of the folder where you want to store the documents.

> **Useful Information**
>
> If you run the program on a network, we recommend that you create a folder on your hard drive to store these files. This makes it easier to share the files with other users in your network.
>
> To include these files in your regular data backup, create the storage folder as a subfolder of your Data folder. Files stored outside of the Data folder are not included in the backup. To locate the Data folder's path, on the File menu, click **About**.

3. Click **Save/OK**, then **Close**.

After selecting a location to store the documents, you can add files from several locations in the program. The following file types are accepted: .doc, .jpg, .jpeg, .bmp, .emf, .wmf, .ico, .xls, .rtf, and .df.

To add documents

1. In a window with this feature, click **Add Documents**.
2. Select whether you are linking to a **Single File** or **Multiple Files**.
3. If you add a single file, click and select the file you want to link to. If you add multiple files, you need to create a subfolder to store your documents. See the information below for more on these options.

> **Useful Information**
>
> You can also click **Scan** to capture a new image using your scanner. Click **Scanners** in the menu on the Documents dialog box to select your scanner options.

4. Click **Save/OK**, then **Close**.

Scanners — Provides options for how you want to scan and name your documents. You can select one or more of the following options:

- **Automatically Assign Unique Filename on Scan** — Automatically names the newly-scanned document with a unique name. If you don't select this option, you are prompted to name the document.
- **Show Scanner Interface on Scan** — Displays the properties of your scanner and the scanning progress through your scanner's interface.
- **Default File Format on Scan: BMP/JPG** — Saves your document in the specified file format.

Choose the Scanner on Scan — Select which scanner to use if you have multiple scanners. If you only have one scanner or always want to use the default, don't select this option.

Image Processes — Provides options to rotate your image clockwise by 90 degrees, 180 degrees, or 270 degrees.

Zoom — Provides options to view your image in different modes: Full Page, Full Width, or at a certain percentage.

Single File — Associates one file with the current record.

Multiple Files — Copies files to a subfolder associated with the current record. When you select this option, a message displays prompting you to create a subfolder.

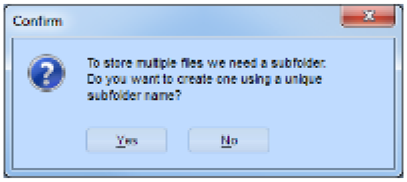

Fig. 6-2.

Click **Yes** to create a uniquely-named subfolder in your default document path. Click **No** if you want to select a subfolder or return to the Documents dialog box. If you click **No**, a second message displays.

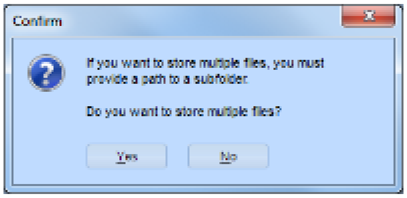

Fig. 6-3.

Click **Yes** to select an existing subfolder to store your files in, or click **No** to return to the Documents dialog box.

Once you have a subfolder, you can add new files and delete stored files.

Scan — Uses a scanner connected to your computer to scan a new document into the program. Before scanning in a new document, select your scanner options on **Scanners** in the Documents dialog box.

Useful Information

If you're using the single file option and already have a document linked to the current record, a message displays asking if you want to overwrite the existing file. Click **Yes** to discard your document and use the new file, or click **No** to return to your current document.

Remove — Removes the association between the file and the record.

If you remove a single file, you have the option to delete the original file from your computer. If you delete it, the file is moved to the Recycle Bin on your computer.

If you remove multiple files, the link to the subfolder that contains the files is removed from the program. The subfolder and its contents are still available in the original location on your computer.

Once you have linked files to records in your program, click **View Documents** to view the documents associated with the current record.

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7: Tuition and Fees

Fund Setup

When you set up a fund, the first step is to define the nature of the fund. Since families and individuals will use this fund, it must contain activities that describe the fees you charge and the payments they make.

On the Administration tab, click **Fund Setup**.

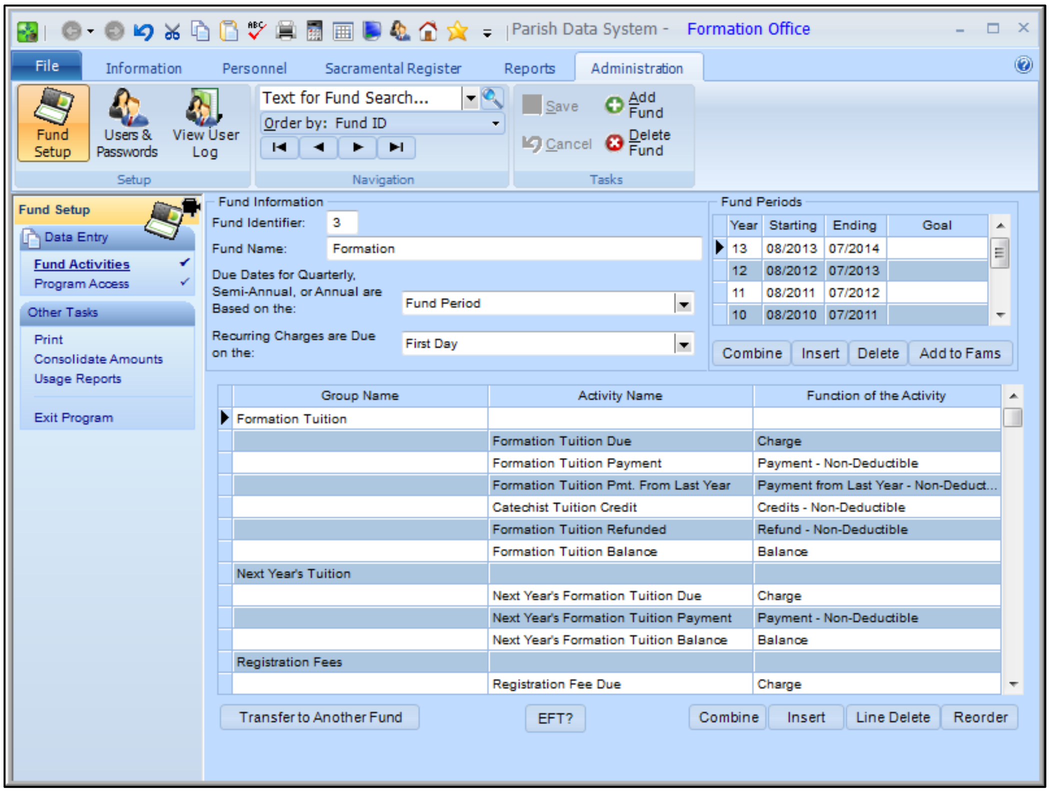

Fig. 7-1.

Adding Funds

You should add a new fund when your organization is planning to take a new collection over a long period of time or several short periods of time (fund periods).

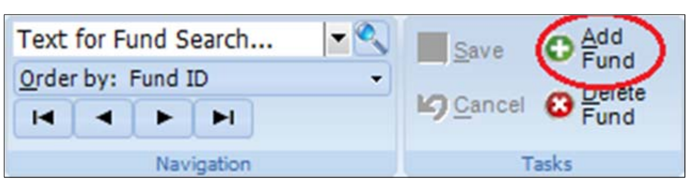

Fig. 7-2.

To add a fund

1. On the Administration tab, click **Fund Setup**.
2. In the Tasks group on the ribbon, click **Add Fund**.
3. In the **Fund Identifier** field, enter a one- or two-digit number or letter fund ID.
4. In the **Fund Name** field, enter a specific name for the fund.
5. Select the due date information and the recurring charge due dates from the drop-down lists.
6. Under Fund Periods, enter the two-digit year, starting date (MM/YYYY format), ending date (MM/YYYY format), and goal.
7. To add fund activities, click **Insert** below the fund activities grid.
   Note: If you haven't backed up your data today, you are prompted to do so now.
8. Click **Yes** to insert predefined fund activities, or click **No** to create your own fund groups.
9. If you create your own fund groups, enter the group name, activity name, and function of the activity.
10. Click **Save**.

About Fund Information

This area of the Fund Setup window controls the fund number, name, and recurring charge due dates.

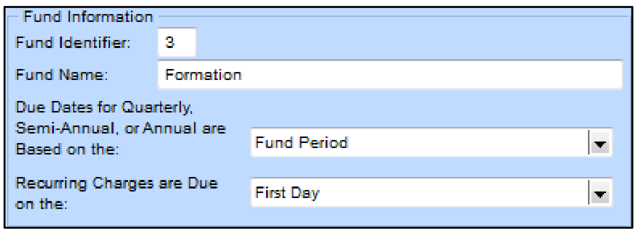

Fig. 7-3.

Fund Identifier — Enter up to two numbers or letters to identify each fund you want to develop. Each fund identifier must be unique.

Fund Name — Enter a unique name to identify the fund.

Due Dates for Quarterly, Semi-Annual, or Annual are Based on the: — The program can calculate the due dates based on the option you select:

- **Fund Period** — The date range of the fund. For example, if the fund period is set up to run from July to the following June, a family's quarterly pledges are due July 1, October 1, January 1, and April 1.
- **Billing Period** — The tuition or pledging date range of the individual family. For example, if the family pledges quarterly from May to the following April, the due dates are May 1, August 1, November 1, and February 1.
- **Calendar Year** — January to December. For example, if the family pledges quarterly from May to the following April, their due dates begin July 1 then follow every three months — October 1, January 1, and April 1.

Recurring Charges are Due on the: — You can select **First Day**, **Last Day**, and **15th**. The recurring charges are applied to a family on the first or last day of the time period selected, or on the 15th of the month if the family's billing term is monthly.

To set another monthly due date, select **First Day** for this field, then select the appropriate choice in the **Due Dates for Quarterly** field, and set up each family's billing date starting on the day you want to bill them. For example, to bill on the 20th of each month, set up the family for 01/20/2014 through 12/20/2014.

About Fund Periods

This section identifies each fund's starting and ending dates, and goals.

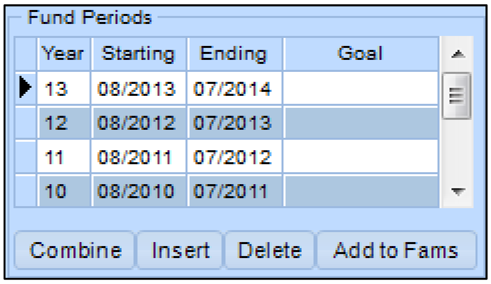

Fig. 7-4.

Each fund is like a collecting season. The fund is used for a certain time period, called a fund period. Instead of creating a new fund at the end of each season, you add a new fund period and prepare for the next season.

Rules regarding fund periods:

- Fund periods can't overlap within the fund. For example, you can't have a fund period from July 2013 to June 2014 and another from January 2014 to December 2014.
- Periods should not be less than one year. For example, from January 2014 to September 2014 (nine months) is not advised.
- Fund periods can range from one year to any number of years. For example, a fund period could stretch from January 2009 to December 2014.
- Fund periods do not have to start at the beginning of the year. For example, most education programs start in May or June. A one-year fund would go until April or May.

> **Useful Information**
>
> The data from the prior period is not removed at the end of the fund period; it is stored under that fund period name so you can use it for reference and comparison.

Goal — This is an optional field. It refers to the total amount you wish to attain within the fund period. It can also be used in reports to measure what has been accomplished up to a given point in the fund period.

Combine — Combines one period with another. No data is lost.

Insert — Creates new fund periods. New periods are inserted in the date range order. Remember that period date ranges cannot overlap. There is a special End of Year process that creates new periods and sets up all current families to use it.

Delete — Deletes fund periods. You can select the periods you want to delete. We recommend that you back up your data before deleting fund periods. Make sure to select the correct fund period line before deleting.

Add to Fams— Adds the selected fund period to all families in the program. This is useful if you are creating a new fund and a new period that you want available to all families.

About Fund Activities

The fund activities grid displays each **Group Name**, **Activity Name**, and **Function** of the activity in the fund. You can add an unlimited number of groups to the fund, each with an unlimited number of activities. You can also add predefined groups and activities to your fund.

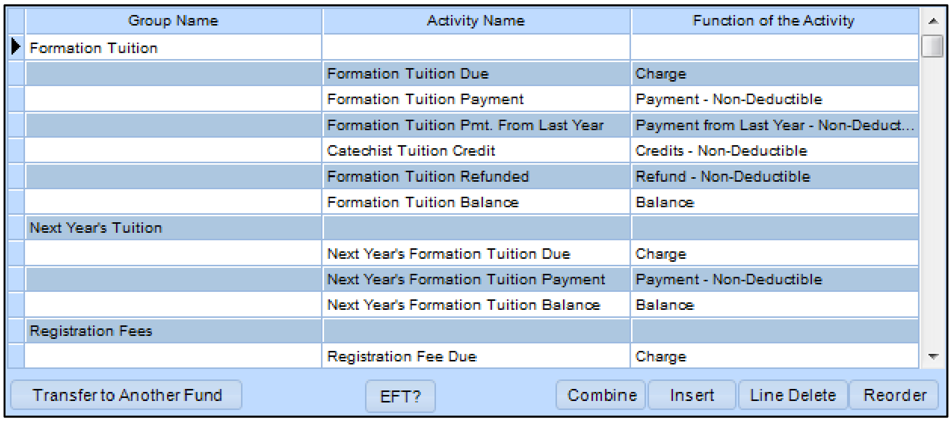

Fig. 7-5.

Group Name — This identifies a group of activities within a fund. For example, one group might deal with current pledges, another with volunteer hours, another with ISF fees, and another with miscellaneous activities. This lets you set up a fund and keep related activities together in a logical order within the fund.

Activity Name — This identifies the activities that are used within a group. Each activity must be unique within the field. For example, for the amount due for tuition, use the Tuition Due activity. For making tuition payments, use the Pmt/Tuition or Tuition Payment activity.

Function of the Activity — What each activity is used for. The following items are options in the drop-down list for activity functions:

- **Payment (Deductible or Non-Deductible)** — Money collected that can be tax-deductible payments, non-deductible payments, initial deposits, or any other general payment.
- **Pay Down (Deductible or Non-Deductible** — A payment that reduces the rate of a pledge without reducing the balance. For example, someone pledges $100 a month for one year (a total of $1200), then makes a pay-down of $300. The rate changes to $75 a month ($1200-$300, divided by 12), but the total remains $1200.
- **Additional Gift** — A payment in a pledge fund that does not count toward the pledge. This option is tax-deductible.
- **Non-Cash Contribution** — A deductible payment that is not cash or check. For example, stock or auction items. The individual must designate a value for the item. When the item is posted, you can apply the value to the family's pledge.
- **Quid Pro Quo** — Used when the family receives something of value in return for their contribution. The activity name must include the dollar amount of the item being received. The program uses the dollar amount in the activity name to determine how much of the contribution is tax-deductible. For example, someone pays $40 for a $20 dinner and auction. Quid Pro Quo is the only activity type that has restrictions on the activity name. The value of the object received must be part of the name, i.e. "Fall Dinner Dance $20."
- **Credits** — Money that counts toward a pledge or fee that was not paid by the family. For example, a scholarship or volunteer credit. The credit options are non-deductible.
- **Payment from Last Year** — A total of the payments on a fund from last year. Used when the fund period overlaps years and the payments must be carried to the next year. Select this option for funds that use the Processes for Carry Forward Balances. This option is non-deductible.

- **Initial Payment (Deductible or Non-Deductible)** — This lets you record a pledge and a payment as a single entry. The pledge is attributed to the first charge activity in the group where the initial payment appears.
- **Charge** — Money due from pledges, fees, or tuition.
- **Refund (Deductible or Non-Deductible)** — Money that has been returned to the individual. This type of activity is used instead of reducing the original posting.
- **Write-Off** — Indicates that the pledge is considered "uncollectible". This reduces the charge by the amount of the write-off, lowering the balance.
- **Hours Pledged** — Some families would rather donate time instead of money. This activity type tracks the amount of time the family has committed to give. If you allow this kind of donation, make sure you set up a separate group in the fund. Each member of the family can pledge a different amount of time.
- **Hours Completed** — Tracks the amount of time a family has completed of their hours pledged.
- **Hours Remaining** — Tracks the amount of time the family has left to donate of their hours pledged.
- **Balance** — The difference between what has been charged and what has been paid. This is normally the last activity in a group that includes a charge type.
- **Group Total** — The total of the activities in a group. This is normally the last activity in a group without a charge type.
- **Ignore** — Used for marking payments that should not be included in the total amount due or paid. For example, a check comes back from the bank with insufficient funds. The program ignores the payment while still tracking the fact that it was received. Each fund should include a Miscellaneous Activities group with an **Ignore** activity type.

Predefined Funds

The program contains a number of predefined funds you can use as models for your fund. To see the predefined funds and the groups and activities they use, click **Insert** below the fund activities grid.

Church Contributions — A group of basic payment activities including offering, holy days, Christmas, and Easter. It also includes a group of miscellaneous activities, including non-cash contributions, quid pro quo, and ISF/Ignore.

Stewardship — A combination of the Church Contributions and Pledge Drive predefined lists.

School Tuition — School-related groups and activities such as tuition, book fees, graduation fees, and registration charges. It also includes non-deductible payment, and credit types. Fee groups that consist of charge, payment, refund, and balance activities are also included.

Formation — Tuition and fee groups and activities, as well as non-deductible payment, and credit types. Fee groups that consist of charge, payment, refund, and balance activities are also included.

Pledge Drive — A group of pledge activities, including charges, several payment types, and a balance. It also includes a group of volunteers, service hours activities, and a group of miscellaneous activities.

Extra Contributions — A group of common extra contributions and miscellaneous activities that are grouped with ISF/Ignore.

The Pledge Drive predefined fund looks like the following:

Parish Data System
Fund Setup Information

Fund Identifier: 3
Fund Name: Formation

Due Dates for Quarterly Semi-Annual or Annual are Based on the: Fund Period

Recurring Charges are Due on the: First Day

Fund Periods:

13 8/2013 - 7/2014
12 8/2012 - 7/2013
11 8/2011 - 7/2012
10 8/2010 - 7/2011
09 8/2009 - 7/2010

Fund Activities:

Group Name	Activity Name	Function of the Activity
Formation Tuition		
	Formation Tuition Due	Charge
	Formation Tuition Payment	Payment - Non-Deductible
	Formation Tuition Pmt. From Last Year	Payment from Last Year - Non-Deductible
	Catechist Tuition Credit	Credits - Non-Deductible
	Formation Tuition Refunded	Refund - Non-Deductible
	Formation Tuition Balance	Balance
Next Year's Tuition		
	Next Year's Formation Tuition Due	Charge
	Next Year's Formation Tuition Payment	Payment - Non-Deductible
	Next Year's Formation Tuition Balance	Balance
Registration Fees		
	Registration Fee Due	Charge
	Registration Fee Payment	Payment - Non-Deductible
	Pmt/Reg Fee From Last Yr	Payment from Last Year - Non-Deductible
	Registration Payment Refunded	Refund - Non-Deductible
	Registration Fee Balance	Balance
Next Year's Registration		
	Next Year's Registration Fee	Charge
	Next Year's Registration Payment	Payment - Non-Deductible
	Next Year's Registration Balance	Balance
Book Fees		
	Book Fees Due	Charge
	Book Payment	Payment - Non-Deductible
	Book Payment Refunded	Refund - Non-Deductible
	Book Fee Balance	Balance
Sacrament Preparation		
	Sacramental Prep Fee Due	Charge
	Sacramental Prep Payment	Payment - Non-Deductible
	Sacramental Prep Refunded	Refund - Non-Deductible
	Sacramental Prep Fee Balance	Balance
Prior Year		
	Prior Year Tuition Due	Charge
	Prior Year Fees Due	Charge
	Prior Year Payment	Payment - Non-Deductible
	Prior Year Balance	Balance
Late Charges		

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Fig. 7-6.

Useful Information

For an outline of each predefined fund, see the Appendix chapter of this training guide.

The Formation fund has one main charge group, Formation Tuition, and several fee groups. The fee groups, such as Registration fee, all have the same structure:

- Fee Due – Charge
- Fee Payment – Payment Non-Deductible
- Fee Balance – Balance

You can add other activities to the fee group, such as Credits.

Insert — Adds new groups or activities to your fund. You can modify any of these predefined funds to suit your organization's needs. We recommend examining these funds to get a feel for their structure before developing your own.

Line Delete — Deletes activities. A dialog box displays where you can select the groups or activities you no longer need. When you click **Delete/OK**, the selected items are deleted.

Transfer to Another Fund — Moves a group or activity from one fund to another.

Combine — Combines duplicate groups or activities.

Reorder — Rearranges the order of activities within a group or the order of the groups themselves.

Additional Fund Setup Commands

The program commands in the **Navigation** and **Tasks** groups are similar to other areas of the program.

Fig. 7-7.

In the navigation pane, there are some commands under **Other Tasks**.

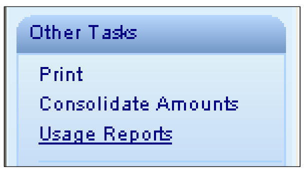


Fig. 7-8.

Print — Prints a neatly-formatted report of the selected fund. This is preferable to a print screen if you have more fund periods or activities than can fit in the window without scrolling.

Consolidate Amounts — In order to conserve storage space, you can reduce the number of financial entries into monthly, quarterly, or yearly totals. Click this option, select the periods you want to consolidate, then click **Consolidate/OK**.

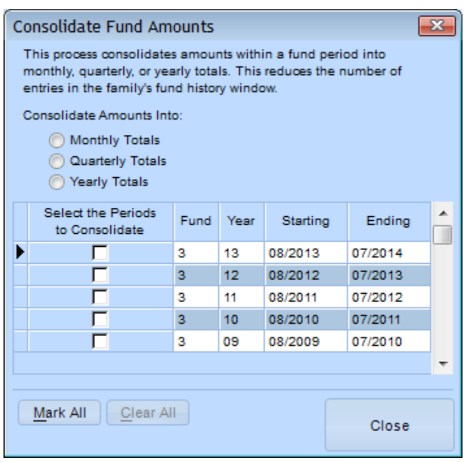


Fig. 7-9.

Usage Reports — You can print reports of information based on the financial activities. Click **1-Print Families** to print all families who have used or are using a particular activity, such as "Christmas" or "Peter's Pence." Click **2-Print Activities** to print all activities along with the number of families using each one.

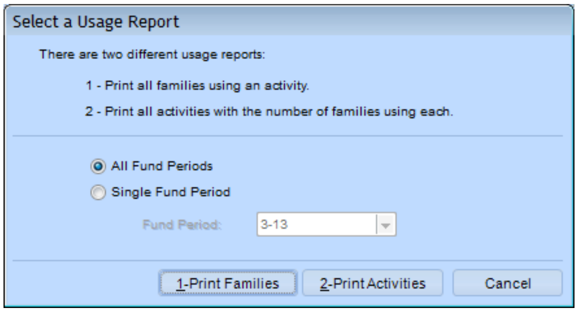


Fig. 7-10.

About Program Access

The Program Access area lets you control which PDS programs can access the funds that have been set up in the program you are using. In the navigation pane, click **Program Access**.

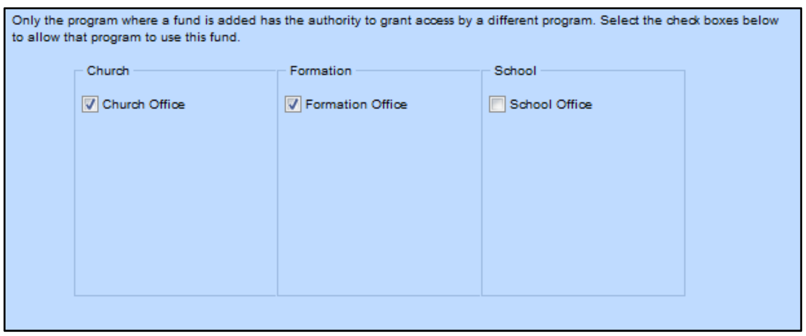


Fig. 7-11.

For example, if a fund is added in the Fund Setup window in the Church Office program, the administrator of that program can restrict or allow viewing for users in Formation Office or School Office. Up to five licensed users for each product can access funds.

Exercise

Exercise #1

Set up a fund with the following attributes:

- **Fund ID:** RE
- **Fund Name:** Religious Education
- **Due Dates:** Fund Period
- **Recurring Charges:** First Day
- **Period:** RE-14, from July 2014 to June 2015
- **Goal:** $20,000
- **Groups/Activities:**
  - One Student Tuition
    - One Student Tuition Due – Charge
    - Pmt/One Student Tuition – Payment Non-Deductible
    - One Student Tuition Bal – Balance
  - Two Students Tuition
    - Two Students Tuition Due – Charge
    - Pmt/Two Students Tuition – Payment Non-Deductible
    - Two Students Tuition Bal – Balance
  - 3 or More Students Tuition
    - 3 or More Students Tuition Due – Charge
    - Pmt/3 or More Students Tuition – Payment Non-Deductible
    - 3 or More Students Tuition Bal – Balance
  - Registration Fees
    - Reg Fee Due – Charge
    - Pmt/Reg Fee – Payment Deductible
    - Reg Fee Bal – Balance

Add this fund to all families.

Family Fund Setup

Each family can have a fund set up to respond to their particular needs. This means they can have special rates, fees, billing periods, and so on.

On the Information tab, click **Tuition & Fees**. From here, you can set up each family with detailed financial information.

The family name and ID display at the top; the totals for all funds, fund identifier, funds used, and fund name display in the middle; and other commands are located in the Tasks group and in the navigation pane.

To view different information for the selected fund period, in the navigation pane, select an option under the Data Entry section.

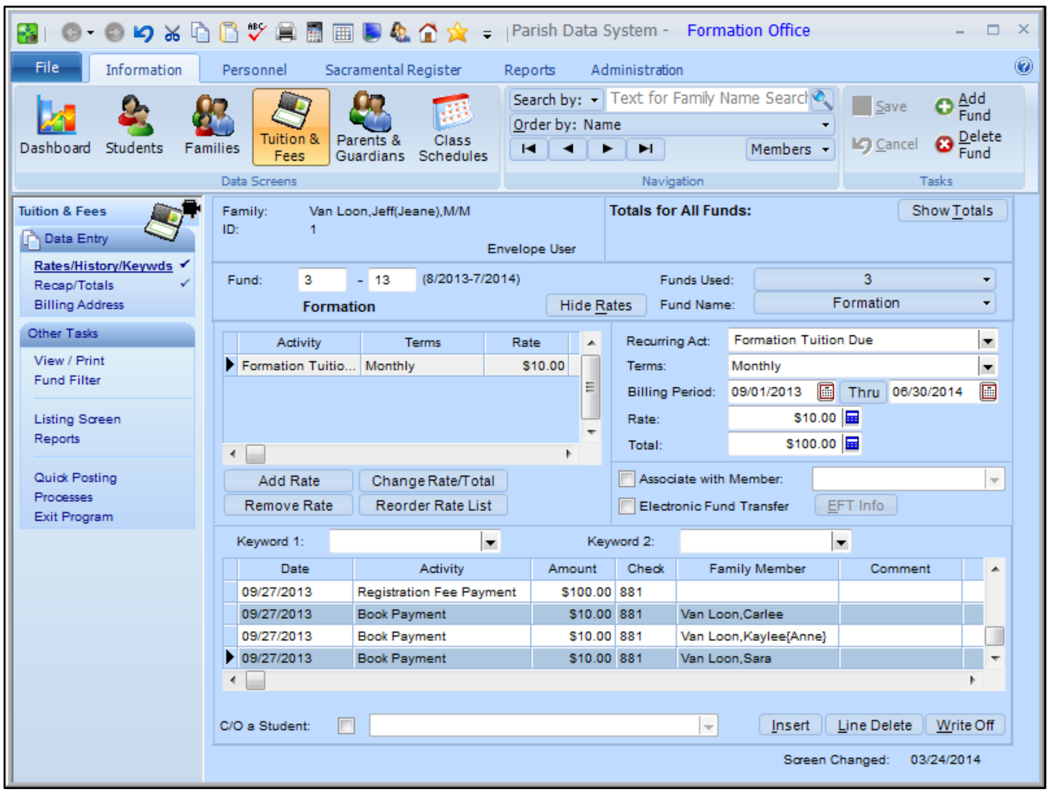


Fig. 7-12.

Adding Family Funds

You cannot post payments or charges to a family until the fund and fund period are added to their record. For example, you need to set up funds for a new family, or you may have a fund set up for an existing family, but you need to add the current fund period.

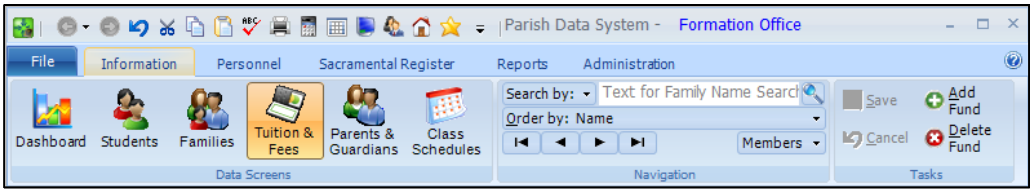


Fig. 7-13.

To add a fund or fund period to a family

1. On the Information tab, click **Tuition & Fees**.
2. In the **Tasks** group on the ribbon, click **Add Fund**.
3. Select the fund and period.
4. Click **Save**.
5. The fund is now added, and you can post payments for the family. You can also add a fund during most of the quick posting processes, such as Payment/Donation Entry.

About Rates, History, and Keywords

In the Rates/History/Keywds window, you can set up pledge terms and rates for a family for the selected fund period. Each family member can have a separate pledge or tuition rate.

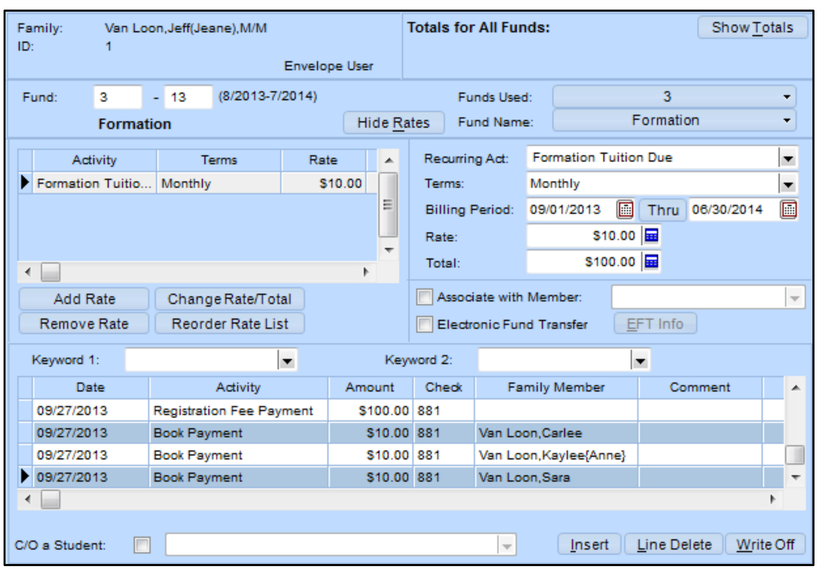


Fig. 7-14.

To display the grand total of all funds for a family, click **Show Totals**. Once clicked, the button changes to **Hide Totals**. Click again to hide the totals.

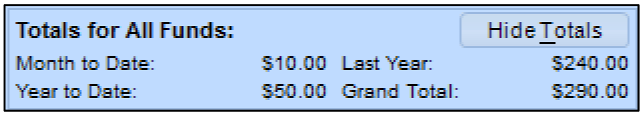


Fig. 7-15.

To set up a recurring charge term and rate for a family

1. On the Information tab, click **Tuition & Fees**.
2. Locate the appropriate family.
3. In the Rates/History/Keywds window, click **Funds Used** and select the fund the rate will be added to. If the fund or fund period needs to be added to the selected family, click **Add Fund** in the **Tasks** group on the ribbon.
4. In the Rates section of the Rates/History/Keywds window, click **Add Rate**.
5. Select an activity name for the **Recurring Act** entry. The listed activities are taken from the Fund Setup window.
6. For the **Terms**, click the drop-down arrow to display the list of terms you can use to determine how often a charge occurs.
7. Enter the **Billing Period** date range for the charge. It cannot exceed the range of the fund period. Click to select the dates of the pledge. To select how long the pledge will last, click **Thru.** For example, two weeks, one month, or fund period, after entering the start date.
8. Enter the recurring **Rate** amount of the charge, such as $10 a month.
9. The total is automatically calculated based on the billing period and the rate. You can edit this field if needed.

> **Useful Information**
>
> If you enter the term, billing period, and rate, the program calculates the total. If you enter the term, billing period, and total, the program calculates the rate.

10. Select **Associate with Member** to enter the name of the family member you want to connect these charges with.
11. Select **Electronic Fund Transfer** if the family wants to have funds automatically withdrawn from an account or charged to a credit card. To enter the bank and financial information for the transfer, click **EFT Info**. If you have an account with either Vanco, you can click **EFT Info** to enter data directly onto the Vanco or QuanComm websites.
12. Click **Save**.

Follow these same steps to add any additional rates that should be applied to the selected family.

If terms/rates do not apply to the fund you are viewing, click **Hide Rates** so more history entries display. The button changes to **Show Rates**. To redisplay terms/rates information, click the button again.

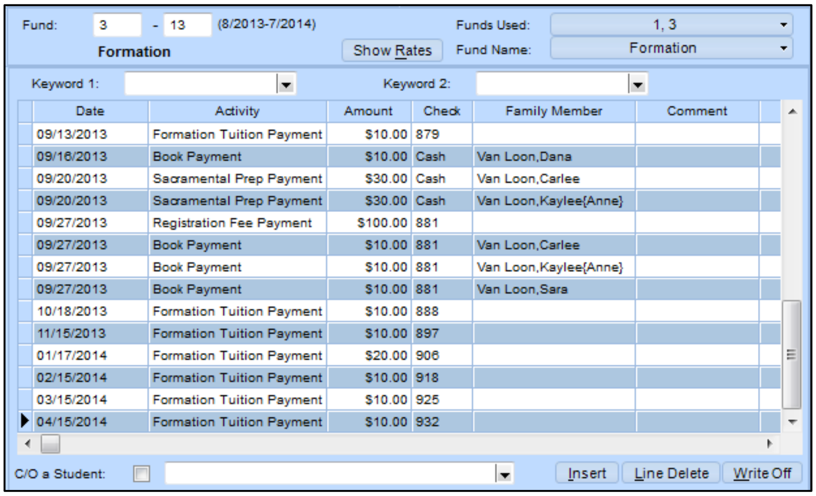


Fig. 7-16.

This window has a place for two fund keywords and displays each posting entry in date order. To add postings directly to this window, click **Insert**. Or, use the Payment/Donation Entry process to add postings. To access this process, in the navigation pane, click **Quick Posting**, then click **Payment/Donation Entry**.

To post an amount to a fund when the amount is considered uncollectible

1. In the Rates/History/Keywds window, below the History posting grid, click **Write Off**. In order to use this command, you must first add a write-off activity to this fund in the Fund Setup window.

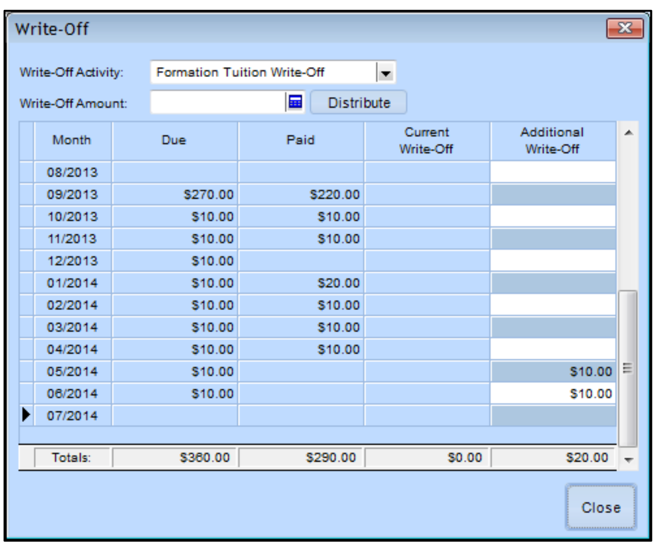


Fig. 7-17.

2. Enter the **Write-Off Amount**, or use to enter the amount.
3. To distribute the write-off amount, click **Distribute**. You can also apply a **Write-Off** amount to a specific month by entering the amount in the **Additional Write-Off** column.
4. Once you enter the Write-Off amount, click **Save** and then **Close**.

About Recap and Totals

In the Recap/Totals window, you can view a summary of the groups and activities used by a family. Below this information, the program displays the fund totals. In the navigation pane, click **Recap/Totals**.

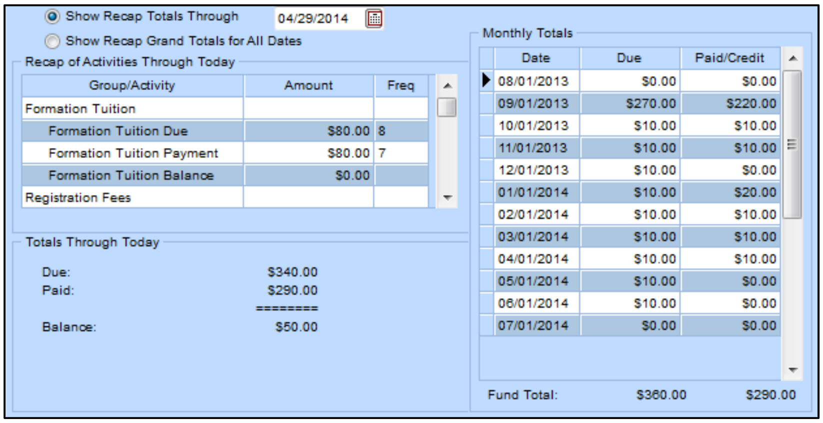


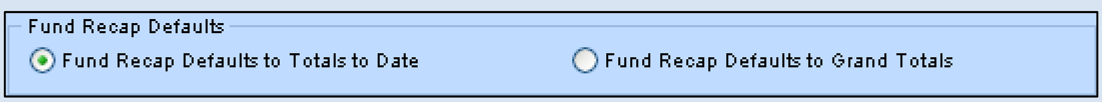
Fig. 7-18.

Show Recap Totals Through — Displays the totals through the date you want. This does not include future postings.

Show Recap Grand Totals for All Dates — Displays the grand total, including future postings. For example, if you enter a charge or payment with a date sometime in the future, the total amount due, rather than the amount due to date, displays.

Useful Information

You can select the default view of this window. On the File Menu, click **Setup > Initial Setup**.



Make your selection and click **Save/OK**, then **Close**.

About Billing Address

The Billing Address window displays the billing address information for the selected fund, if different from the mailing or street address. In the navigation pane, click **Billing Address**.

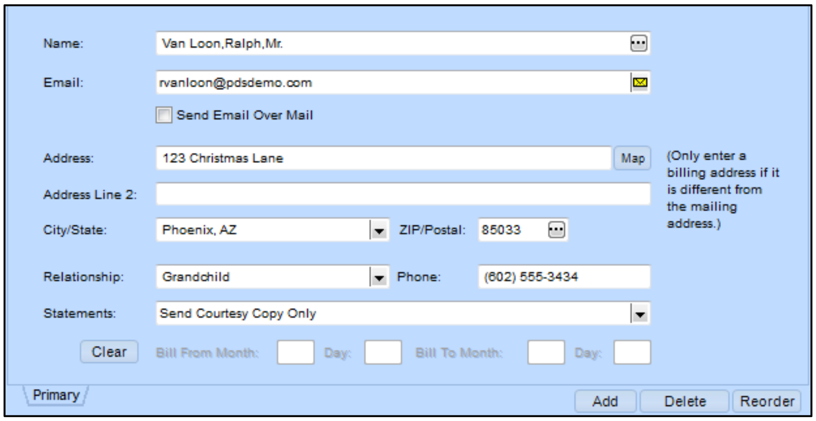


Fig. 7-19.

Use this window to send courtesy copies to a relative or to send copies of the billing statement to a different address during specific times of the year. You can add an unlimited number of billing addresses.

Other Tuition & Fees Tasks

In the navigation pane of the Tuition & Fees window, under **Other Tasks**, there are two additional commands: **View/Print** and **Fund Filter**.

View/Print — Displays a listing screen where you can view and print fund activities by fund, fund period, or all funds and periods combined. You can also select to display and print recurring charge activities.

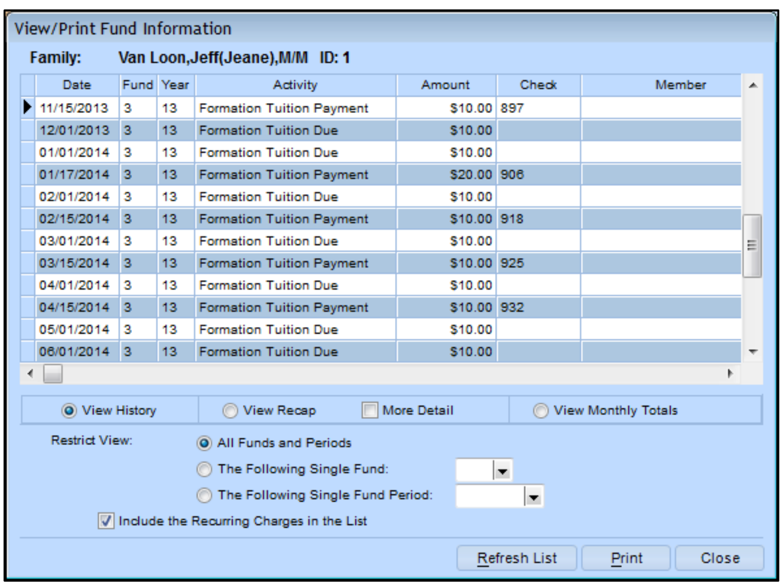


Fig. 7-20.

Fund Filter — Normally, when you use the navigation buttons to scroll through records, the program displays each record. To only display families with a specific fund or fund period, click **Fund Filter**, and make your selections.

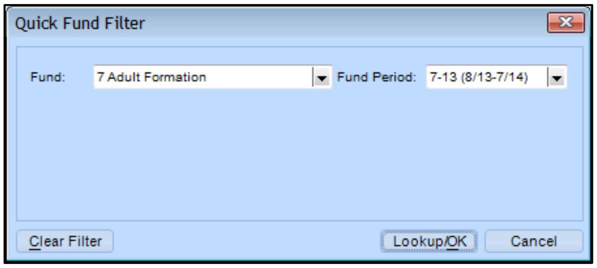


Fig. 7-21.

The filter is applied until you go back to the Quick Fund Filter dialog box, and click **Clear Filter** then **Lookup/OK**.

Exercises

For the following exercises, use the fund created at the end of the Fund Setup section.

Exercise #2

Set up a family for a tuition payment of $10 each week for the entire fund period.

Exercise #3

Set up a family for a tuition payment of $50 each quarter from August 2014 to April 2015. When is their first payment due?

Exercise #4

Set up a family for a tuition payment of $150 monthly, for a total of $2000. What special conditions must be made?

Exercise #5

Set up one student of the family with a tuition payment of $20 Weekly and another student with $100 Monthly for the entire fund period. Which student's total will be higher?

Exercise #6

Set up a family for a tuition payment of $100 per month, with a pay-down of $300.

Questions

Answer these questions pertaining to funds.

Q: What three activity types would you need to track a Bus Fee?

A: ____

Q: Can you post to fund 1-14 after fund 1-15 has been created? Why or why not?

A: ____

Q: What is the difference between "Weekly" and "Weekly on Tuesday"? How is this distinction useful?

A: ____

Q: What is the difference between Fund Period, Billing Period, and Calendar Year?

A: ____

Q: What are the four rules for fund periods?

A: ____

____

____

____

Q: What is special about Quid Pro Quo activities?

A: ____

Q: What activity type would you use to post a payment that reduces the rate but not the total pledge?

A: ____

Q: What activity type would you use to post stock?

A: ____

Q: What section of the Tuition & Fees window would you access to see the family's fund status through today?

A: ____

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8: Quick Posting

Quick postings are designed to help you enter new data quickly by using a wizard to enter a large amount of related data at one time. They produce a list of selected items for viewing and printing before the information is posted.

The quick postings are located in the navigation pane of the following data windows:

Student Posting

On the Information tab, click **Students**, then in the navigation pane, click **Quick Posting**.

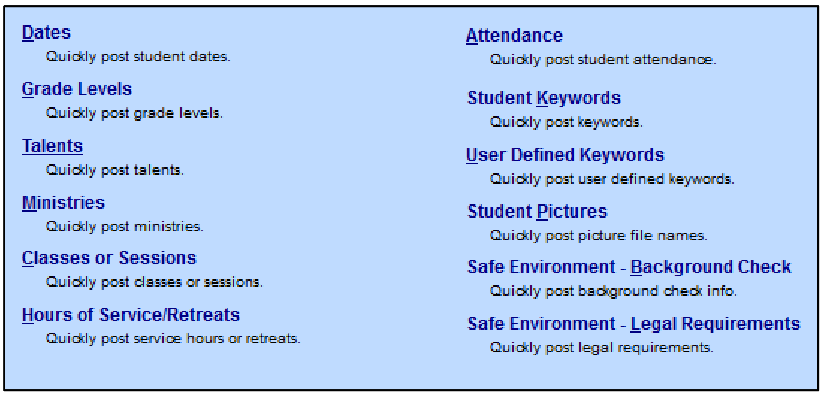

Fig. 8-1.

Dates — Post student sacrament dates in the Students Sacraments window.

Grade Levels — Post the school grade levels in the Students Personal window, or post the formation grade levels in the Students Detail window.

Talents — Post talent keywords in the Talents section of the Students Ministries/Talents window.

Ministries — Post ministry keywords in the Ministries section of the Students Ministries/Talents window.

Classes or Sessions — Post student class sessions in the Students Detail window.

Hours of Service/Retreats — Post service hours or retreats in the Students Service/Retreats window.

Attendance — Post student attendance in the Students Attendance window. When using this process to post student attendance based on an entire class/session, you can also select to mark the Catechist in attendance.

Student Keywords — Post general student keywords in the Keywords section of the Students Personal window.

User Defined Keywords — Post the 11 user-defined keywords in the Students Personal window. You can also use this quick posting to post Marital Status, Language, Ethnicity, and Location in the Students Personal window.

Student Pictures — Post student picture files in the Students Personal window.

Safe Environment - Background Check — Post background check information in the Students and/or Parents & Guardians Safe Environment window.

Safe Environment - Legal Requirements — Post legal requirements in the Students and/or Parents & Guardians Safe Environment window.

Family Posting

On the Information tab, click **Families**, then in the navigation pane, click **Quick Posting**.

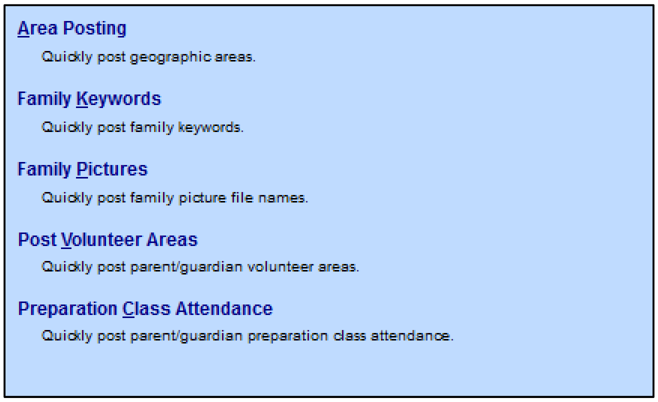

Fig. 8-2.

Area Posting — Post geographic areas in the Families Primary Information window.

Family Keywords — Post general family keywords in the Families Primary Information window.

Family Pictures — Post family picture files in the Families Primary Information window.

Post Volunteer Areas — Post parent/guardian volunteer areas in the Parents & Guardians Volunteer/Prep Classes window.

Preparation Class Attendance — Post parent/guardian preparation class information in the Parents & Guardians Volunteer/Prep Classes window.

Tuition & Fees Posting

On the Information tab, click **Tuition & Fees**, then in the navigation pane, click **Quick Posting**.

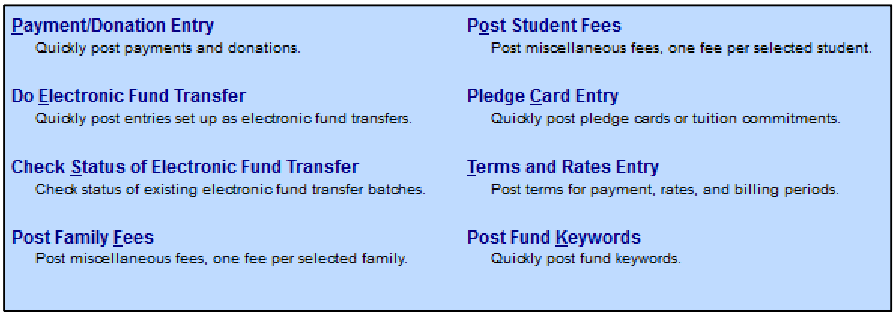

Fig. 8-3.

Payment/Donation Entry — Quickly post payments and donations for families and members in the Rates/History/Keywds Tuition & Fees window.

Do Electronic Fund Transfer — Post entries set up as electronic fund transfers for families and members in the Rates/History/Keywds Tuition & Fees window.

Check Status of Electronic Fund Transfer — Check the status of an existing Electronic Fund Transfer batch.

Useful Information

Detailed information about posting the Electronic Fund Transfer entries is found in the Formation Office User Guide.

Post Family Fees — Post miscellaneous fees, one per selected family in the Rates/History/Keywds Tuition & Fees window.

Post Student Fees — Post miscellaneous fees, one per selected student in the Rates/History/Keywds Tuition & Fees window.

Pledge Card Entry — Post pledge cards or tuition commitments in the Rates/History/Keywds Tuition & Fees window.

Terms and Rates Entry — Post pledge terms and billing rates in the Rates/History/Keywds Tuition & Fees window.

Post Fund Keywords — Post fund keywords in the Rates/History/Keywds Tuition & Fees window.

Common Steps in the Quick Postings

Each of the quick postings follows the same general steps. For this training guide, as an example, we use the **Student Dates** posting.

Automatic vs. Individual

In the first step of the wizard, select **Automatic Updating** or **Individual Entry**.

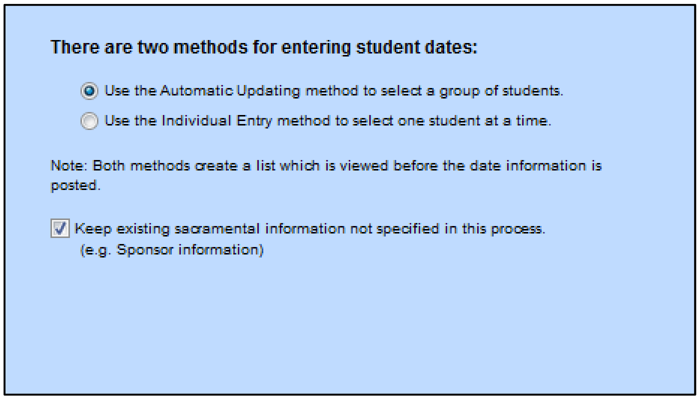

Fig. 8-4.

Automatic Updating

To assign information to a group of families or individuals that have something in common, select **Automatic Updating**, and click **Next**. In the Selection window, you can use any selection previously saved from a report, or you can enter a new selection. In this example, we want to select all students in Mrs. Susan Higgins' Confirmation class. After you enter your selection information, click **Next**.

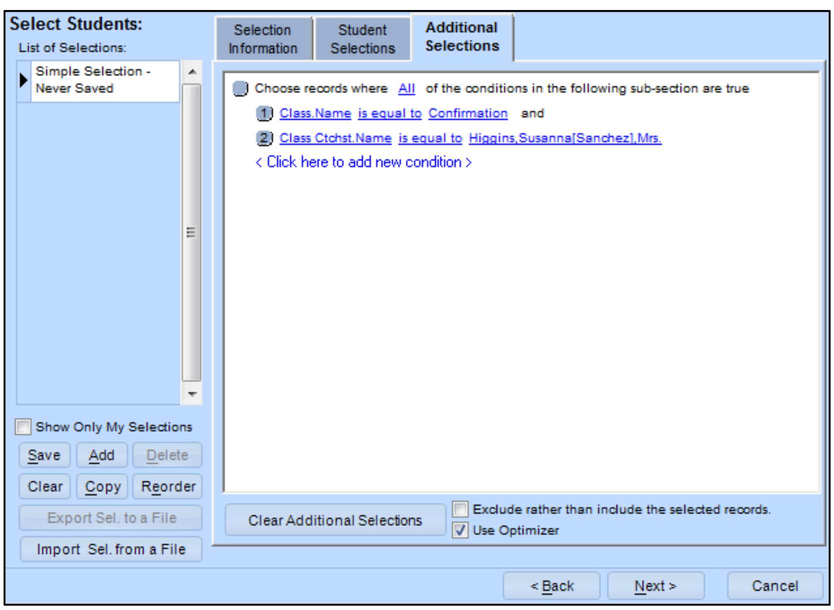

Fig. 8-5.

In the next window of the wizard, select the information you want to post to the families or individuals. In this example, we assign the sacrament date of “Confirmation”, on May 16, performed by Fr. Brown.

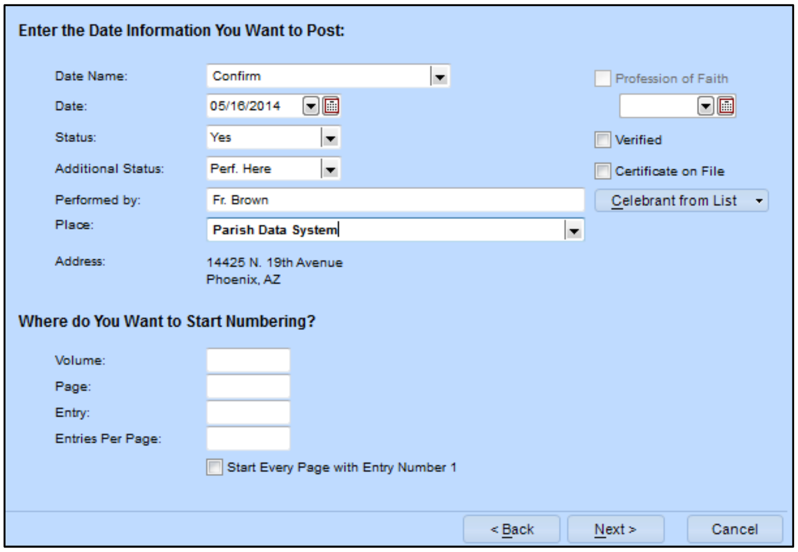

Fig. 8-6.

Individual Posting

In the first step of the wizard, if you selected **Individual Entry**, you must select families or individuals one at a time. Then for each family or individual, you enter or select what information you want to post. In our example, after you select a student, click **Add Student to List**. After you enter all families or individuals you want to post for, click **Next**.

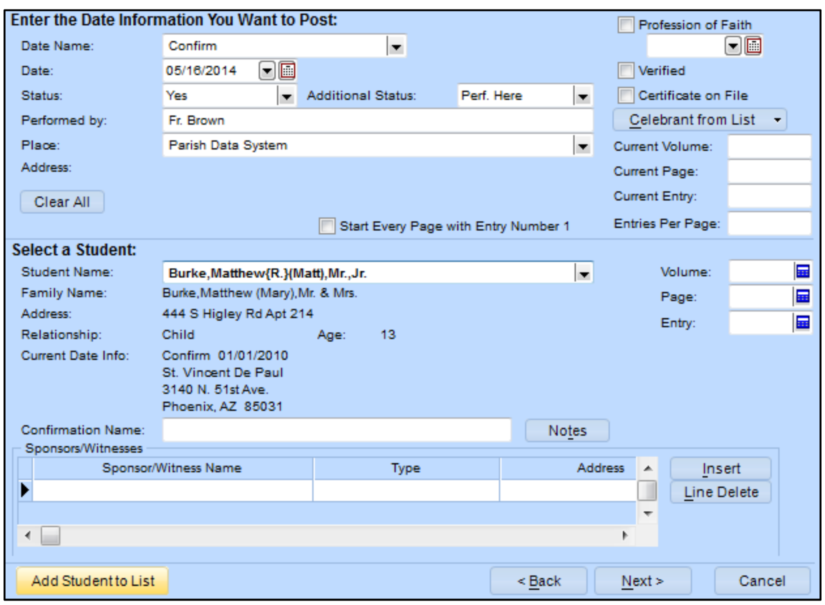

Fig. 8-7.

Review the List

The next step of the wizard is the same for both the automatic and individual entry method. In this window, review the list of families and individuals and the fields you want to post. You can modify some information in this window. To remove a family or individual from the posting, clear the **Post Information** check box. To include a family or individual who was left out, click **Add Family/Student to List**; in this example, **Add Student to List**. After you review the information you want to post, click **Next**.

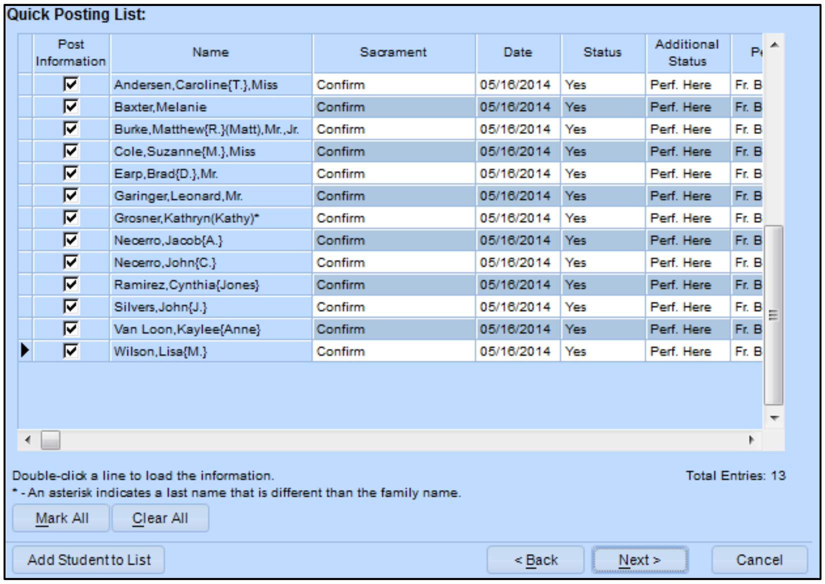

Fig. 8-8.

Ready to Post

In the final step of the wizard, to print a summary of the changes, select the check box. To post the information, click **Finish**.

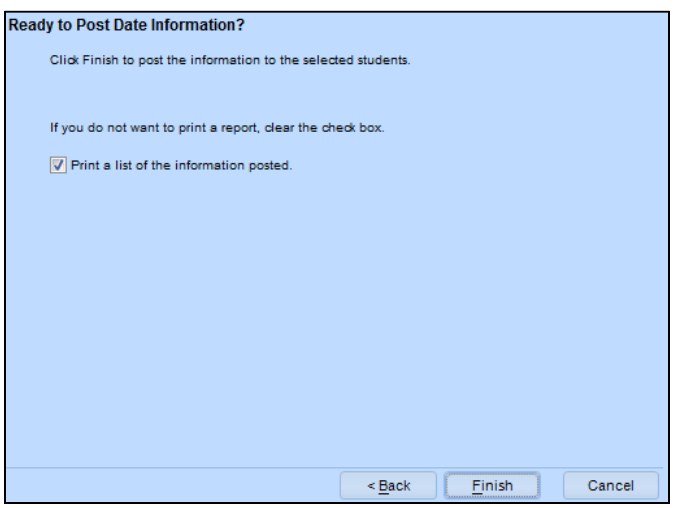

Fig. 8-9.

Notes About the Quick Postings

- Quick postings produce a list of the records you selected for posting before the data is actually posted. In this step of the wizard, you can edit some information, select to leave a record out of the posting, or add a record to the list for posting.
- Posting does not occur as you select records. To post the information, you must click **Finish** in the last step of the wizard.
- You can post an unlimited number of records during a quick posting.
- Some quick postings prompt you to back up your data if you have not already done so that day.
- To stop a posting, click **Cancel** at any time.
- To return to a previous step of the wizard and adjust your selections, click **Back**.
- If you navigate to another part of the program before you click **Finish**, the posting is cancelled.

Quick Posting of Payments

The most commonly used quick posting is Payment/Donation Entry. Using this, you can post to any activity of any fund that is set up in the Fund Setup window.

To quickly post payments/donations

1. On the Information tab, click **Tuition & Fees**.
2. In the navigation pane, click **Quick Posting**.
3. Select **Payment/Donation Entry**.
4. If you have any unfinished batches (those that haven't been posted), the Quick Posting Batches dialog box displays. To continue with an existing batch, select the batch in the list, then click **Use Existing Batch**. To start a new batch, click **Add New Batch**.
5. If you create a new batch, on the Quick Posting Options dialog box, select how you want to perform this posting and future postings, then click **Use/OK**.
   Note: You can also click **Options** below the posting grid to select your posting options.
6. Enter the payments or contributions in the posting grid. For more details, see The Posting Window section of this chapter.

List of Batches

When you post payments, you can save a batch of postings before you're finished and before you post. When you select the **Payment/Donation Entry** quick posting, if you have any unfinished batches, the Quick Posting Batches window displays. At the top of this window, the batches you have entered display in batch number order. At the bottom, the postings that are part of the selected batch display. To add postings to an existing batch, click **Use Existing Batch**. Or, to begin a new batch of postings, click **Add New Batch**.

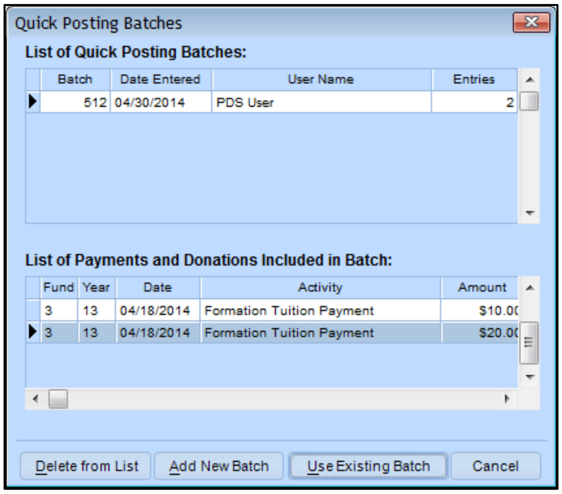

Fig. 8-10.

Quick Posting Options

The Quick Posting Options dialog box displays each time you create a new batch. Use it to select information that should be repeated automatically for each payment. You can automatically post check numbers, comments, and attendance for all payments or contributions. You can also transfer the total to PDS Ledger or QuickBooks.

For each batch, determine how you want to identify each family when posting. For example, if you select **ID Number and Name**, then you can select the family to post to by either entering their ID Number or by entering their name. Click **Use/OK** to save the options you selected.

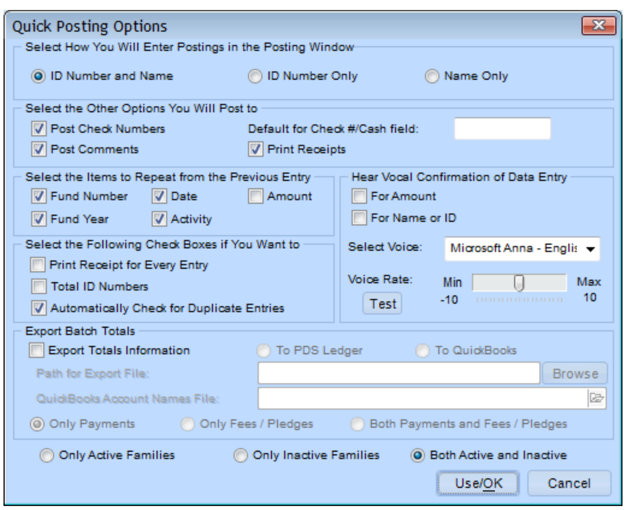

Fig. 8-11.

Additional Field Information

<u>Select How You Will Enter Postings in the Posting Window</u>

Determine which information you want to use to identify your families when posting. To change the option fields at any time during the posting, in the Posting dialog, click **Options**.

- **ID Number and Name**— Identify the contributing family by:
    - Family ID Number
    - Member ID Number
    - Family Name
    - Member Name
- **ID Number Only** — Identify the contributing family by Family ID/Env Number or Member ID/Env Number.
- **Name Only** — Identify the family you want to post a contribution or donation for by entering Family Name or Member Name.

<u>Select the Other Options You Will Post to</u>

Select from the following optional selections. Clear the options you do not plan to use and PDS will remove them from the Quick Posting window.

- **Post Check Numbers** — Select if you plan to enter check numbers, "Cash", "M.O." or any other description.
- **Default for Check #/Cash field** — Enter a default description for each post. For example, if the majority of your posts are cash, enter **Cash**. For entries that are not cash, you can edit the default description when you enter the post.
- **Post Comments** — Comments can be used with any financial entry but are commonly used with Non-Cash and Quid Pro Quo contributions.
- **Print Receipts** — Select if you plan to print receipts for every entry. This option creates a Print Receipt column on each ledger line when you post payments.

<u>Select the Items to Repeat from the Previous Entry</u>

These options default the value of the previous entry to the next entry to save time. You can type over the default value to change it.

- **Fund Number** — Select if the majority of entries post to the same fund.
- **Fund Year** — Select if the majority of entries post to the same fund period.
- **Date** — Select if the majority of entries post to the same date, or if you intend to sort the entries in date order before entering them.
- **Activity** — Select if the majority of entries post to the same fund activity (such as Offering, Donation, Pledge Payment, or Tuition).
- **Amount** — Select if the majority of entries post with the same amount, or if you intend to sort the entries in amount order before entering them.

Select the Following Check Boxes if You Want to

- **Print Receipt for Every Entry** — Select to print a receipt for each entry. Unlike the Print Receipts option, this option does not create a column in the ledger. Receipts for all entries are printed after posting and summary reports print.
- **Total ID Numbers** — Select to display a total of ID Numbers. This is not the total number of ID numbers, but a total value of the ID numbers themselves. For example, if you had two families using ID numbers, one using "101" and the other using "102," the report would total them and display "203." ID Numbers that contain any characters other than numeric values, such as symbols or alphabetical characters are not included in the total.
- **Automatically Check for Duplicate Entries** — This option is selected by default. As you post payment entries, if you enter two entries with the same fund, period, date, family, and amount, a dialog box displays warning that it could be a duplicated. Each time, you have to select to either keep or remove the entry. If you do not want to be prompted for each possible duplicate, clear this option.

> **Useful Information**
>
> On the Quick Posting window, you can check for duplicates. Below the posting grid, click **Check for Duplicates**.

Hear Vocal Confirmation of Data Entry

- **For Amount** — If selected, a computer-generated voice reads back your entries in the amount fields.
- **For Name or ID** — If selected, a computer-generated voice reads back your selections for the name or ID fields.
- **Select Voice** — If you plan to use the vocal confirmation feature, select the text-to-voice speech synthesizer program you use. Windows Vista and Windows 7 come with Microsoft Anna. You might have other options depending on the software installed on your computer.
- **Voice Rate** — Select the speed the synthesizer reads back your entries. The slowest speed is -10. Click **Test** to confirm the voice rate.

Export Batch Totals

- **To PDS Ledger** — Creates a batch file that contains the totals for each fund and each activity group. The file can be imported into the PDS Ledger program. The file name format is Batch###.PFB, where ### is the batch number. For example, if the batch number is 411, the file name will be Batch411.PFB.
- **To QuickBooks** — Creates a batch file that contains the totals for each fund and each activity group. The file can be imported into QuickBooks®. The file name format is Batch###.IIF, where ### is the batch number. For example, if the batch number is 411, the file name will be Batch411.IIF.
- **Path for Export File** — Enter the path where the file should be created. To search for the path and filename, click **Browse**.
- **QuickBooks Account Names File** — Enter the path where the QuickBooks .IIF file with the Chart of Accounts names is located. This option is only available if you select the **To QuickBooks** option.

Additional Options

- **Only Active Families** — Include families who are active (those who have not been marked inactive).
- **Only Inactive Families** — Include families who are inactive.
- **Both Active and Inactive** — Include all families.

The Posting Window

The Quick Posting window for payments and donations displays each payment or contribution in a grid. Information for the selected family displays at the top of the window. Inactive families appear in the grid in red, if you selected to display them. You can resize and reorder the grid columns. Click the column heading you want to move, and drag and drop it in the new location.

If the family has never used the fund you are posting to, the program may warn and ask if you want to continue posting the entry. To continue, click **Yes**, and the fund is added to the family. To add funds to families without displaying the confirmation message, clear the **Display Message when Family does not have the Fund Setup** option.

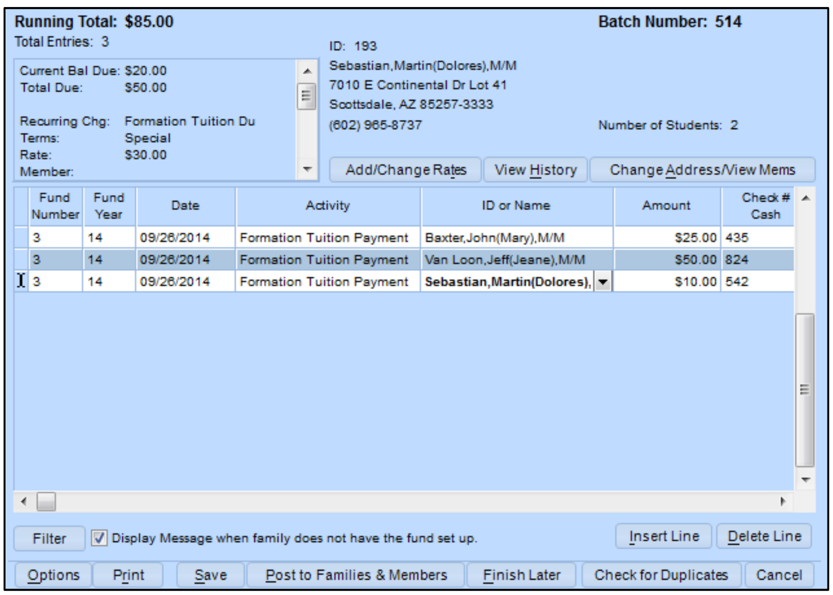

Fig. 8-12.

The Posting Grid

Enter the payments or contributions in the posting grid.

Fund Number and **Fund Year** — Enter a fund number and year, which make up the fund period or fund identifier. These can be different for each line of posting.

Date — Enter the date the entry should post. If no entry is made, the date defaults to today's date. The program recognizes "relaxed dates," which means you can enter a posting outside of the fund period's regular date range. For example, a Registration Fee Payment for fund 8-14 is dated March 15, 2014. Reports see the posting as part of the fund period (8-14), even though it is before the fund period begins (8/14 - 7/15).

Activity — This identifies the fund activity that the payment or donation will be posted to. You can only select from fund activity names that have been set up in the Fund Setup window for the fund being used. If you leave this field blank, the program defaults to the first payment type in the drop-down list.

ID or Name — The column varies depending on the selection you made in the Options dialog box for entering families or members. Enter or select **ID Number** or **Name**. Click the drop-down arrow in this field to view a list of families or members and ID numbers.

Amount — Enter the dollar amount of the contribution, donation, or payment. Non-cash donations usually do not have a dollar value entered, so enter "0" for the amount and use the comment field to describe the item.

Check #/Cash — If the contribution was made with a check, enter the check number. If the contribution was made with cash, enter **CASH**, or for a money order, enter **M.O**. If the contribution was made with a credit card you can enter **MC**, **Visa**, **Am EX**, or other descriptions.

Print Receipt — Select to print a receipt for the entry. Receipts are printed at the end of the posting, after all entries have posted and the summary report(s) have printed.

Comment — Enter additional descriptions about the payment or contribution. This is usually used for Non-Cash Contributions, but can be used for any posting.

Useful Information

If you try to add a posting entry to a family that does not have the indicated fund period set up, the program offers to add the fund to the family during posting.

To change the posting options set at the beginning of the wizard, click **Options**. This action does not close the posting and it does not post the items. It allows you to make changes to the settings during the posting.

To print a preliminary copy of the summary report, click **Print**. You can then compare the totals with the bank deposit and see if you need to make any corrections before posting.

Saving, Posting, and Printing

You can save the posting batch and return to it later, or you can post the batch as soon as you finish making entries. You can enter an unlimited number of entries in one posting. However, we recommend you save your posting after every 100 entries or so.

- To do a "quick save" of the batch internally and continue working, click **Save**.
- To save the batch and exit the window, click **Finish Later**. Doing this does not post any items. You can return to the batch at a later time. To return to the batch, click **Use Existing Batch**.
- To leave this batch without saving or posting any items, click **Cancel**.
- When adding entries, if you post an entry to the same fund and period, for the same family, with the same amount as another entry, the posting displays a duplicate entry message. If you select **Yes,** the entry is kept. If you select **No,** the posting then knows it is a duplicate and the entry is removed.
- Use **Check for Duplicates** to do a final check for duplicate entries before posting to family records. If duplicates are found, a dialog box displays. This dialog box lists the details about the duplicate entries, including the entry line number so you can further investigate and make the necessary modifications before continuing with posting the batch.
- To post the items, click **Post to Families & Members**.

If you select **Yes** to print the information when posting is complete, you can print a batch summary and a detailed list of entries.

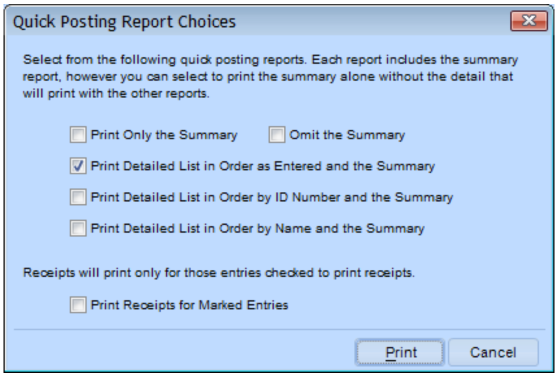

Fig. 8-13.

You can print entries in the order entered, by ID number, or by name. You can also select to omit the summary. When you are ready, you can print the entries marked for receipts. You can change printers and papers.

Exercises

Exercise #1 — Post geographic area "1A" to all families who live in Phoenix.

Exercise #2 — Post grade "3" to all members who are eight years old.

Exercise #3 — Post a $10 late fee to all families who are behind on their pledge in fund RE-14.

Questions

Q: Are quick postings used to update existing information or add new information?

A: ____

Q: What must be set up before you can post a late fee to individual families?

A: ____

Q: Which quick posting would you use to assign fourteen-year-olds to a new confirmation class?

A: ____

Q: Which quick posting would you use to record that students have completed Confirmation?

A: ____

Q: Which quick posting would you use to assess a $25 sacrament fee per student?

A: ____

9: About Processes

Processes help you quickly and easily modify a large amount of related data at one time. Most of the processes suggest running a backup beforehand. Processes are located in the navigation pane of all major data windows. There are also processes that affect all program data. To locate these, on the File menu, click **System Processes**.

Formation and Student Processes

With formation and student processes, you can update data related to many students, their parents/guardians, and catechists at one time. You can also make many of these changes to individual student records.

If you perform these processes at different times, we recommend that you keep an activity log of the functions performed. This activity log helps ensure that a process isn't run more than once a year and that postings aren't duplicated.

> **Important Note**
>
> All processes alter data. We recommend backing up your data before proceeding with any of the processes.

To access these processes, on the Information tab, click **Students** > **Processes**.

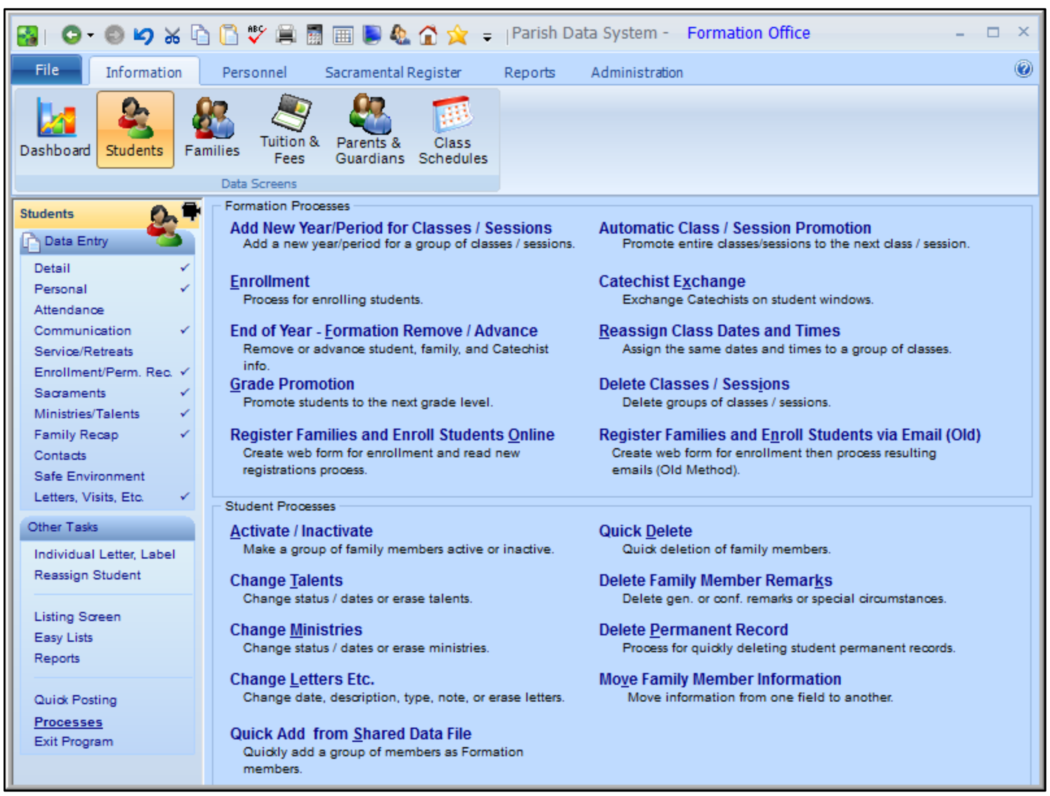

Fig. 9-1.

Formation Processes

The formation processes consist of several data maintenance utilities that are particularly helpful at the beginning and end of the formation year.

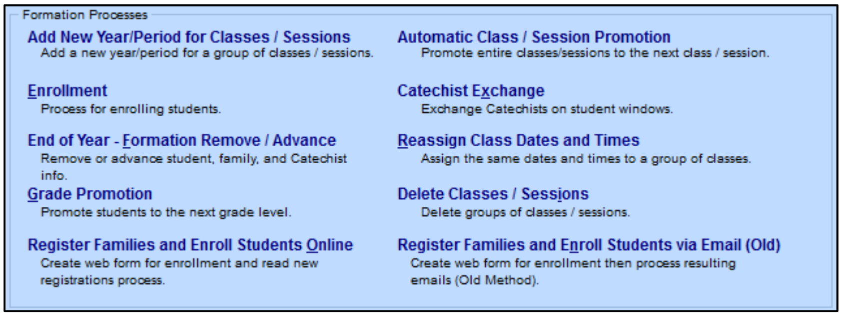

Fig. 9-2.

Adding a New Year or Period

With this process, you can select a group of classes or sessions and duplicate the information with a new year/period and date range. You can select which information to retain and which to leave blank for the new year/period.

In the navigation pane, click **Processes**, and click **Add New Year/Period for Classes/Sessions**.

To add a new year/period automatically

1. Select the **Automatic Updating** option, and click **Next**.
2. Select the classes to post the new year/period for. To filter the selection, click **<Click here to add a new condition>**.
3. Select to include only active, only inactive classes, or all classes, and click **Next**.
4. Select a new year/period and a date range for the period.
5. Select which information you want to retain from the old year/period or select the blank selections to leave that data empty for the new year. When you're finished, click **Next**.

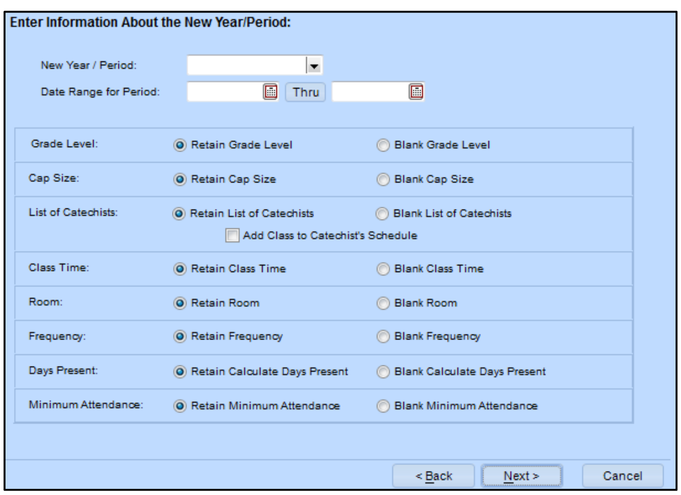

Fig. 9-3.

6. To create a list of dates that the class will not meet, click **Insert**, then enter a date and note. Click **Next**.

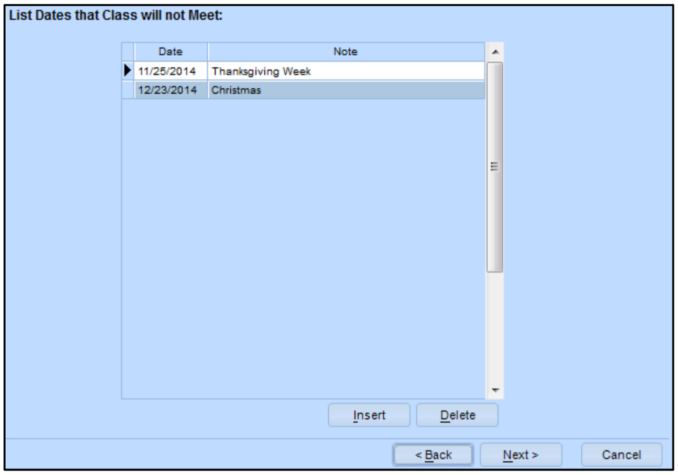

Fig. 9-4.

7. Review your list of classes/sessions. If you want to exclude any records from processing, clear the **Post New Period** check box. When you're ready to post, click **Next**.
8. To post, click **Finish**.

To add a new year/period individually

1. Select the **Individual Entry** method, and click **Next**.
2. Select a new year/period and a date range for the period.
3. Select which information you want to retain from the old year/period or select the blank selections to leave that data empty for the new year. When you're finished, click **Next**.
4. To create a list of dates that the class will not meet, click **Insert**, then enter a date and note. Click **Next**.
5. Select a class, click **Add Class to List**, and repeat this process for each class you want to include. When you're finished, click **Next**.

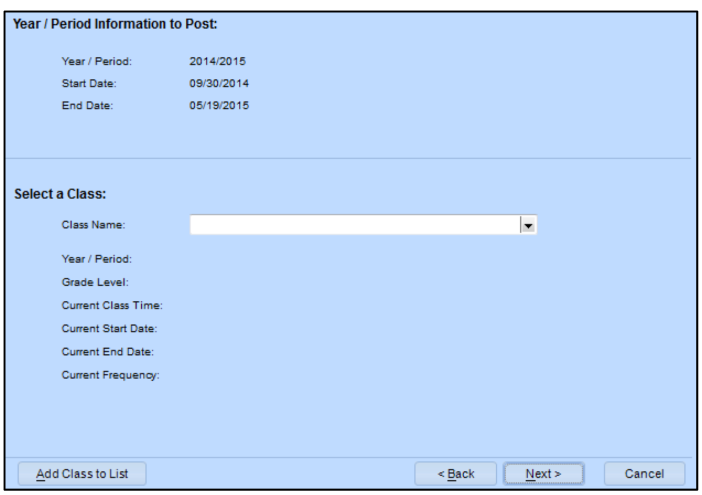

Fig. 9-5.

6. Review your list of classes/sessions. If you want to exclude any records from processing, clear the **Post New Period** check box. When you're ready to post, click **Next**.
7. To post, click **Finish**.

Updating Student Enrollment Information

With this process, you can update student enrollment information for multiple student records.

You don't have to perform all of these activities at the same time. For example, you may want to add the next formation year to the student's enrollment history, but you may not be ready to post class and session information. You should plan the sequence of events ahead of time and keep a log of processes you've completed.

In the navigation pane, click **Processes**, and click **Enrollment**.

To update the student enrollment form

1. Select the information you want to post, and enter any additional details. For more information on these fields, see the Additional Field Information below.

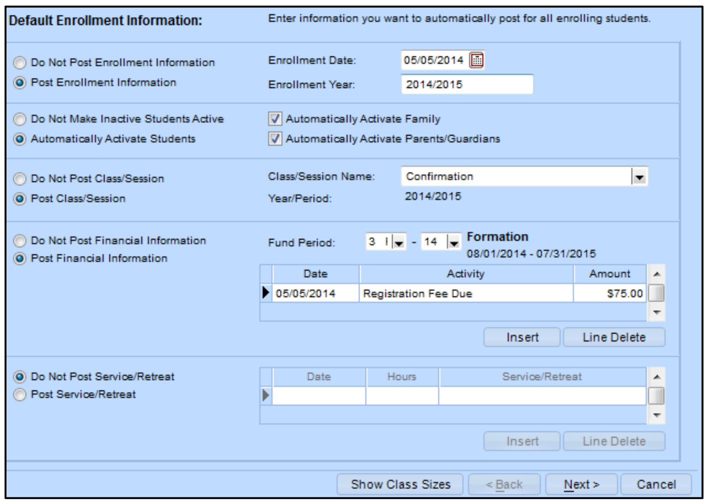

Fig. 9-6.

2. Click **Next**.
3. Select a student, review their information in the dialog box, and click **Yes - Enroll Student**.
4. On each tab, enter the student's information.

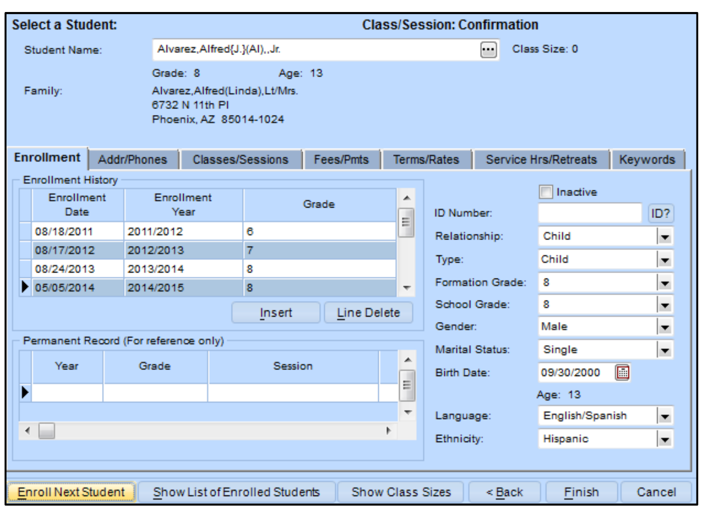

Fig. 9-7.

5. To enroll another student, click **Enroll Next Student**. Repeat steps 3 and 4 for each student you want to enroll.

> **Useful Information**
>
> Click **Show Class Sizes** to display the current number of students enrolled in each class/session. The current class size is recalculated after you enroll each student.

6. When you're ready to enroll the students, click **Finish**.

Additional Field Information

Post Enrollment Information — Add enrollment records for the current year to the Enrollment/Perm Rec section of the Students window for a group of students.

Automatically Activating Students — Prior to preparing your formation data for the new year, you may have pre-registered students by entering family and student personal information but marked them inactive so they wouldn't be included in that year's formation reports. You may have temporarily inactivated students and families for other reasons as well. As the new formation year begins, you can activate these students and families so that they're included in the new formation year's reports.

> **Useful Information**
>
> If an inactive student is included in your list of students to be processed but automatic activation isn't selected, the changes apply to the student but their inactive status doesn't change.

Post Class/Session — Schedule the same class or session for a group of students during the enrollment process. The class/session must be defined in the Class Schedules window. You can view the updated information in the Details section of the Students window.

Post Financial Information — You can post financial activity related to formation tuition and fees to the fund activities of families for selected students. You may want to do this to post registration and/or tuition fees to all enrolling students. View information on all fund activities in the family's Tuition & Fees window.

Post Service/Retreat — Update service and retreat information on students' records. You can view the updated information in the Service/Retreats section of the Students window.

Removing or Advancing Student, Family, Catechist, or Parent/Guardian Information

With this process, you can perform a number of year-end actions, including:

- Updating a student's permanent record with this year's session and attendance information
- Removing graduating and/or inactive students
- Deleting the student's current year schedule, attendance, service, and retreat information to keep only current information
- Promoting students to the next grade
- Updating a catechist's history record with this year's session information
- Removing inactive catechists
- Deleting a catechist's current year schedule and attendance to keep only current information
- Removing old parent/guardian information

You don't have to perform all of these activities at the same time. For example, you may want to perform the grade promotion to get an accurate count of the number of students in a particular grade for the next year, but you may not be ready to remove the prior year session and attendance information. You should plan the sequence of events ahead of time and keep a log of which processes you've worked on.

Useful Information

Proceed through all the pages of the process even if you don't select all of the categories of records to update.

In the navigation pane, click **Processes**, and click **End of Year – Formation Remove/Advance**.

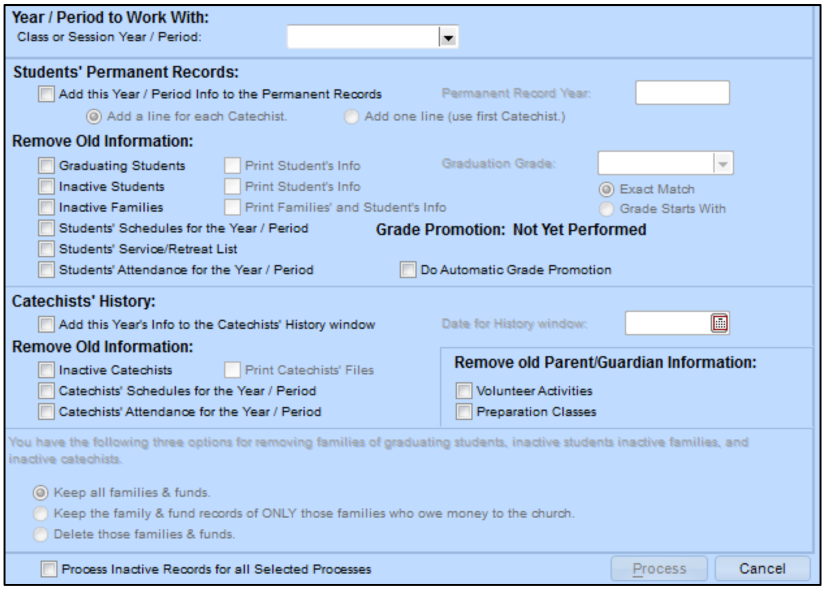

Fig. 9-8.

To run the Remove/Advance process

1. Select which year or period to process.
2. Select any options for updating students' permanent records, removing old student records, and doing an automatic grade promotion.
3. Select any options for updating catechists' history and removing old catechist information.
4. Select any options for removing old parent/guardian information.
5. If you remove family information, select an option for keeping or deleting their records.
6. When you're ready to being the process, click **Process**.

Promoting Students to the Next Grade Level

With this process, you can promote a group of students from one grade level to the next. Remember that you can also promote students during the Formation Remove/Advance process.

> **Useful Information**
>
> Before using this process, review the Grades and Degrees keyword list to ensure it contains each grade you plan to promote and that the list is sorted in the order the grades should be promoted. If your list is out of order, a message displays before you start the process.

In the navigation pane, click **Processes**, and click **Grade Promotion**.

To promote students to the next grade

1. Select to promote only the formation grade, only the school grade, or both, and click **Next**.
2. Enter the range of grade levels you want to promote. Typically, you start with the first grade level on your list (Pre-School or Kindergarten) and end with the last grade level that your school promotes to.
3. To change the type for graduating students, select **Change the type for those currently in the last grade listed below from Child to Young Adult**.

> **Useful Information**
>
> A student's type is set in the Personal section of the Students window. This is one way to distinguish between students whose last grade completed is 12 and students who are currently in grade 12.

4. Select to include only active, only inactive, or all students.
5. The grades for promotion display in the grid. Make any necessary changes, and when you're finished, click **Next**.
6. Review your list of students. If you want to exclude certain records from processing, clear the check box. Click **Next**.
7. To post, click **Promote Students**.

Registering Families and Enrolling Students Online

With this process, you can create an online form for families to enroll their students in formation classes. There are two options with the registration process:

- **Create Web Registration Form** — You can create a registration form for your formation's website. When families complete the online form for their student, registration information is saved to our secure web server.
- **Check and Register Families with Students** — After families complete the online registration form, you can use this option to create or update student records in Formation Office and populate the data fields for the information that the family provided.

In the navigation pane, click **Processes**, and click **Register Families and Enroll Students Online**.

To create an online registration form

1. Select **Create Web Registration Form**.
2. If you use the ACS Extend Platform to maintain your parish website, select **Use Our Extend Platform Service**; otherwise, select **None - Use Other Service**, and click **Next**.
3. Read the process description, and click **Next**.

> **Useful Information**
>
> Note that this process creates a Read Me file, as well as HTML, CSS, and JavaScript files. You need to copy these files and send them to your website manager. If you are the website manager, consult the Read Me file for comprehensive instructions.

4. Enter the form name and brief introduction to display at the top of your web form.
5. Select the sections you want to display on the web form, and click **Next**.
6. If you selected to include student sacraments, user keywords, and/or student remarks on the form, select the fields to display. Click **Next**.
7. Select the class information to display on the web form, and click **Next**.
8. Then select which of those you want to require the family to enter when registering, and click **Next**.

> **Useful Information**
>
> An asterisk (*) displays on the form beside the required fields you select.

9. Enter the email address of the person who should be notified after a family registers their student(s) online.

> **Useful Information**
>
> Typically, this is the email address of the person at your formation who processes registrations.

10. Enter a message to be emailed to the family to confirm that their information was sent to your formation. When you're finished, click **Next**.
11. Select whether to store or transfer the files.
12. Click **Finish** or **Transfer**.

To check for and process registrations

1. Select **Check and Register Families with Students**, and click **Next**.
2. Select the family or families you want to create or update records for.
3. If you no longer need a family's registration, select **Delete Form** to delete their registration from the web server.
4. Review the family and student information. Make any necessary selections or changes, and when you're ready to process the registrations, click **Next**.
5. To post the information, click **Finish**.

Automatically Promoting a Class to the Next Class

With this process, you can promote all the students in one class to another class. You can process multiple classes at once. For example, you can promote all 1st Grade Religious Education students to 2nd Grade Religious Education. To promote students individually to different classes, see the Class/Session quick posting.

In the navigation pane, click **Processes**, and click **Automatic Class/Session Promotion**.

To promote all students in a class/session

1. Select the class/session to move students from, then select the new class/session to move students into.

> **Useful Information**
>
> The classes and their year/periods must be defined in the Class Schedules window and the Class or Session Year/Period Keyword list.

2. Click **Insert**, and repeat this for each class or session.

> **Useful Information**
>
> It's important to promote all classes that use this automatic posting feature at one time. For example, if the 5th grade RE class is promoted to 6th grade RE, and the 6th grade RE is not promoted to 7th grade RE, both the newly promoted class and the original class are assigned to the 6th grade RE class.

3. Select to include only active students, only inactive students, or all students.
4. When you're ready to move the students, click **Post Classes/Sessions**.

Exchanging Previous Catechists With New Catechists

If a catechist leaves during the formation year, you can use this process to assign their sessions to another catechist or a new catechist.

> **Useful Information**
>
> Before running this process, you must add the new catechist in the Catechists window.

In the navigation pane, click **Processes**, and click **Catechist Exchange**.

To change a catechist's assignment

1. Select the original catechist.
2. Select the new catechist who is replacing the original catechist.
3. Make any additional selections to update the catechist information.
4. When you're ready to process the changes, click **Exchange/OK**.

Reassigning Class Dates and Times

With this process, you can conveniently assign the same schedule, days, and times to a group of classes. For example, it can be a lot of work to open every class and make the change if you have most of the same classes this year that you had last year, except the days they meet change.

In the navigation pane, click **Processes**, and click **Reassign Class Dates and Times**.

To reassign dates and times automatically

1. Select the **Automatic Updating** method, and click **Next**.
2. Make selections to filter the list of classes you want to reassign. Select to include active, inactive, or all classes, and click **Next**.
3. Enter the new dates and times for the class(es), and click **Next**.
4. If you want to exclude any classes from processing, clear the **Post Information** check box. When you're ready to update the selected records, click **Next**.
5. To post, click **Finish**.

To reassign dates and times individually

1. Select the **Individual Entry** method, and click **Next**.
2. Enter the new dates and times for the class(es), and click **Next**.
3. Select a class, and click **Add Class to List**. Repeat this process for each class you want to update, and when you're finished, click **Next**.
4. If you want to exclude any classes from processing, clear the **Post Information** check box. When you're ready to post, click **Next**.
5. To post, click **Finish**.

Deleting Classes or Sessions

With this process, you can delete multiple classes or sessions at one time. In the navigation pane, click **Processes**, and click **Delete Classes/Sessions**.

To delete classes/sessions automatically

1. Select the **Automatic Updating** method, and click **Next**.
2. Make selections to filter the list of classes you want to delete.
3. Review your list of classes. If you want to exclude any classes from processing, clear the check box. When you're ready to delete the selected classes, click **Next**.
4. To remove the records, click **Finish**.

To delete classes/sessions individually

1. Select the **Individual Entry** method, and click **Next**.
2. Select a class, and click **Add Class to List**. Repeat this process for each class you want to delete, and when you're finished, click **Next**.
3. Review your list of classes. If you want to exclude any classes from processing, clear the check box. When you're ready to delete the classes, click **Next**.
4. To remove the records, click **Finish**.

Student Processes

The student processes provide you with utilities for managing information related to the members in your Formation database.

In this section, the words "student", "member", and "family member" are often used interchangeably. "Member" can mean a parent, guardian, catechist, or student.

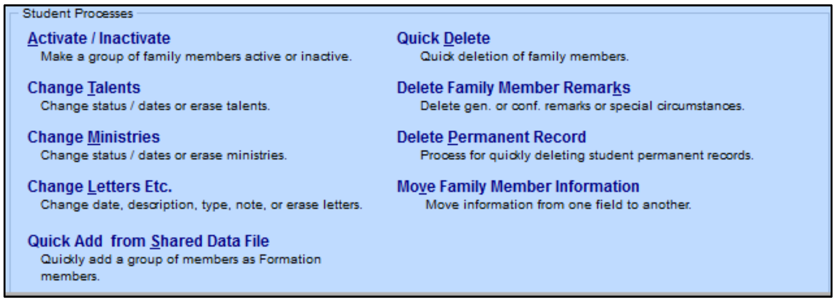

Fig. 9-9.

Activating or Inactivating Family Member Records

With this process, you can activate or inactivate multiple records simultaneously. For example, if some family members visit in the summer months, you can place them on an Inactive roster for the winter months.

Useful Information

The inactive flag is a shared data field. Therefore, if you're sharing data with other PDS Office programs, activating or inactivating these family members is also reflected in those programs.

In the navigation pane, click **Processes**, and click **Activate/Inactivate**.

To change an individual's status automatically

1. Select the **Automatic Updating** method, and click **Next**.
2. Select whether to make family members active or inactive, and select an option for inactive families. Click **Next**.

   Useful Information

   All active members in the database must belong to active families. Therefore, when activating members of inactive families, this process provides an option to automatically activate the families at the same time.

3. Select the type of family members to make active or inactive, and click **Next**.
4. Select which family member records you want to activate or inactivate. To filter the list, click **<Click here to add a new condition>**. When you're finished, click **Next**.
5. Review your list of records. If you want to exclude any records, clear the check box. When you're ready to update the selected records, click **Next**.
6. To update the records, click **Finish**.

To change an individual's status individually

1. Select the **Individual Entry** method, and click **Next**.
2. Select whether to make family members active or inactive, and select an option for inactive families. Click **Next**.

> **Useful Information**
>
> All active members in the database must belong to active families. Therefore, when activating members of inactive families, this process provides an option to automatically activate the families at the same time.

3. Select the type of family members to make active or inactive, and click **Next**.
4. Select a family member, and click **Add Member to List**. Repeat this process for each family member, and when you're finished, click **Next**.
5. Review your list of records. If you want to exclude any records, clear the check box. When you're ready to update the selected records, click **Next**.
6. To update the records, click **Finish**.

Updating Family Member Talents

With this process, you can update or erase talent details for multiple individuals simultaneously. You can view talents in the Ministries/Talents section of the Students window.

You can run this process for any individuals in the program, not just students, and you can modify existing talent information. Also, since talent records are included in shared data files, updates to talent information initiated in this program are reflected in the other Office databases.

> **Useful Information**
>
> This process doesn't post new entries to the Ministries/Talents window. To quickly post talents, go to the Students window, and in the navigation pane, click **Quick Posting > Talents**.

In the navigation pane, click **Processes**, and click **Change Talents**.

To update family member talents

1. In the first window, make your selections, and click **Next**.
2. Select the type of family members to make changes to, and click **Next**.
3. Select which family members to update. To filter the selection, click **<Click here to add new condition>**.
4. Select to include only active or inactive individuals, or all individuals, and click **Next**.
5. To assign different talents to each individual, select the first option. To update your entire list of individuals simultaneously, select the second option, and enter the new talent status and dates. Click **Next**.
6. Review your list of individuals. If you want to exclude any records, clear the check box. When you're ready to update the selected records, click **Next**.
7. To update the records, click **Finish**.

Updating Family Member Ministries

With this process, you can update or erase ministry details for multiple individuals simultaneously. You can view ministry changes in the Ministries/Talents section of the Students window.

You can run this process for any individuals in the program, not just students, and you can modify existing ministry information. Also, since ministry records are included in shared data files, updates to ministry information initiated in this program are reflected in the other Office databases.

> **Useful Information**
>
> This process doesn't post new entries to the Ministries/Talents window. To quickly post ministries, go to the Students window, and in the navigation pane, click **Quick Posting > Ministries**.

In the navigation pane, click **Processes**, and click **Change Ministries**.

To update family member ministries

1. In the first window, select which ministries, status, and/or dates to update. To filter family members based on specific ministries, select **Only include family members...**, and in the corresponding drop-down list, select a ministry, status, and/or date range.
2. Click **Next**.
3. Select the type of family members to include in the process, and click **Next**.
4. Select the family members whose ministry you want to update. To filter the selection, click **<Click here to add a new condition>**.
5. Select to include only active or inactive family members, or all members, and click **Next**.
6. To assign different ministries to each family member, select the first option. If you want to update your entire list of family members simultaneously, select the second option, and enter the new ministry, status, and/or dates.
7. Click **Next**.
8. Review your list of records. If necessary, you can edit the columns for each family member. If you want to exclude any records, clear the check box. When you're ready to update the selected records, click **Next**.
9. To update the records, click **Finish**.

Updating Family Member Interactions

With this process, you can update or erase the logged letter entry on multiple records simultaneously. Once processed, you can view updates in the Letters, Visits, Etc. section of an individual's window.

> **Useful Information**
>
> This process modifies existing entries in the Letters, Visits, Etc. window. It does not enter new lines.

For example, while conducting a pledge drive, you mailed two letters—the second with a pledge card. Soon, you begin receiving pledge cards from the families, and you want to update their records. In this case, you must change the Type for the sent letters to **Positive Response**. This makes it possible to locate and follow up on those who haven't responded by a certain date.

In the navigation pane, click **Processes**, and click **Change Letters Etc**.

To update interaction details

1. In the first window, make your selections, and click **Next**.
2. Select the type of members to change, and click **Next**.
3. Select the family members whose interactions you want to update. To filter the selection, click **<Click here to add a new condition>**.
4. Select to include only active or inactive family members, or all members, and click **Next**.
5. To assign different interaction information to each family member, select the first option. To update your entire list of family members simultaneously, select the second option, enter the interaction details.
6. Click **Next**.
7. Review your list of family members. If you want to exclude any records from processing, clear the check box.
8. To erase an interaction, in the **Erase this Line** column, select the check box to mark each item you want to erase.
9. When you are ready to process the information selected, click **Next**.
10. To post, click **Finish**.

Adding Individuals From Church or School Office

With this process, you can add records from Church or School Office to the Formation Office program through a shared data location.

Useful Information

You can only use Quick Add to process members if you share data with other PDS Office programs.

In the navigation pane, click **Processes**, and click **Quick Add from Shared Data File**.

To add individuals from another program automatically

1. Select the **Automatic Updating** method, and select whether to include members who have been deleted from the programs.
2. Click **Next**.
3. Make selections to filter the list of family members you want to add.
4. Select to include active, inactive, or all family members, and click **Next**.
5. Review your list of members. If you want to exclude any records, clear the check box. When you're ready to add the selected records, click **Next**.
6. To add the records, click **Finish**.

To add individuals from another program individually

1. Select the **Individual Entry** method, and select whether to include members who have been deleted from the programs.
2. Click **Next**.
3. Select a family member, verify their information, and click **Add Family Member to List**. Repeat this process for each member, and when you're finished, click **Next**.
4. Review your list of members. If you want to exclude any records, clear the check box. When you're ready to add the selected records, click **Next**.
5. To add the records, click **Finish**.

Removing Multiple Individuals

With this process, you can delete a group of individuals from your database.

Useful Information

You can only remove a record permanently from your shared database if another program is not using that record. For example, if you share data with Church Office, you may want to retain access to a member in Church Office but remove them from the list of current members in Formation Office.

In the navigation pane, click **Processes**, and click **Quick Delete**.

To delete a group of members automatically

1. Select the **Automatic Updating** method. If you're sharing data, select whether or not to permanently delete the members from all programs.
2. Click **Next**.
3. Make selections to filter the list of members you want to delete.
4. Select to include only active, only inactive, or all members, and click **Next**.
5. Review your list of members. If you want to exclude any records from processing, clear the check box. Click **Next**.
6. To remove the selected members, click **Finish**.

To delete a group of members individually

1. Select the **Individual Entry** method. If you're sharing data, select whether or not to permanently delete the members from all programs.
2. Click **Next**.
3. Select a member, verify their information, and click **Add Member to List**. Repeat this process for each member, and when you're finished, click **Next**.
4. Review your list of members. If you want to exclude any records from processing, clear the check box. Click **Next**.
5. To remove the selected members, click **Finish**.

Deleting Family Member Remarks

With this process, you can remove the general, confidential, or special circumstance remarks from multiple records simultaneously. In the navigation pane, click **Processes**, and click **Delete Family Member Remarks**.

To delete family member remarks automatically

1. Select the **Automatic Updating** method, and click **Next**.
2. Select which remarks to delete, and click **Next**.
3. Select which type of family members to delete remarks for, and click **Next**.
4. Make selections to filter the list of family members whose remarks you want to delete. Select to include only active, only inactive, or all members, and click **Next**.
5. Review your list of family members. If you want to exclude any records from processing, clear the check box. Click **Next**.
6. To delete the remarks, click **Finish**.

To delete family member remarks individually

1. Select the **Individual Entry** method, and click **Next**.
2. Select which remarks to delete, and click **Next**.
3. Select which type of family members to delete remarks for, and click **Next**.
4. Select a family member, verify their information, and click **Add Member to List**. Repeat this process for each family member, and when you're finished, click **Next**.
5. Review your list of family members. If you want to exclude any records from processing, clear the check box. Click **Next**.
6. To delete the remarks, click **Finish**.

Deleting Permanent Records

With this process, you can erase information found on a student's permanent record. You can delete entries for a specific year or all permanent record entries. For example, if you want to keep only the last five years of a student's permanent records, you would delete records older than six years after you start the new school year.

In the navigation pane, click **Processes**, and click **Delete Permanent Record**.

To delete permanent records automatically

1. Select the **Automatic Updating** method, and click **Next**.
2. Make selections to filter the list of students whose permanent record information you want to delete.
3. Select whether to include only active, only inactive, or all students in the list, and click **Next**.
4. Select whether to delete all the entries or only the matching entries. Enter additional information if needed, and click **Next**.
5. Review your list of records. If you want to exclude any records from processing, clear the check box. Click **Next**.
6. To delete the information, click **Finish**.

To delete permanent records individually

1. Select the **Individual Entry** method, and click **Next**.
2. Select the student whose permanent record information you want to delete, and click **Add Student to List**. Repeat this process for each student, and when you're finished, click **Next**.
3. Review your list of records. If you want to exclude any records from processing, clear the check box. Click **Next**.
4. To delete the information, click **Finish**.

Moving Family Member Information to Another Field

With this process, you can move information from one field to another for multiple records. For example, if someone mistakenly entered the student relationship in the type field, you can move the type field to the relationship field for the affected students.

In the navigation pane, click **Processes**, and click **Move Family Member Information**.

To move family member information

1. Make selections to filter the list of family members whose fields you want to move, and click **Next**.
2. Select the type of family members you want to work with, and click **Next**.
3. Select the source field you want to move. To remove the original data, select **Blank out <Source Field>**.

> **Useful Information**
>
> If you don't select this, the field retains the original value, and a copy of it is placed in the destination field.

4. If you move a memo field (a large text box, such as comments), select to move either the entire memo or a single line.
5. Select the destination field for the data you're moving.
6. If you move a memo field, select to either overwrite the data or append it to the end.
7. To move the data, click **Move Fields**.
8. Click **Yes** to confirm the move.
9. In the Print dialog box, click **Preview** to view the data moved.

Family Processes

With family processes, you can change information in multiple family records simultaneously. You can also make many of these changes to individual family records.

> **Important Note**
>
> All processes alter data. We recommend backing up your data before proceeding with any of the processes.

To access these processes, on the Information tab, click **Families** > **Processes**.

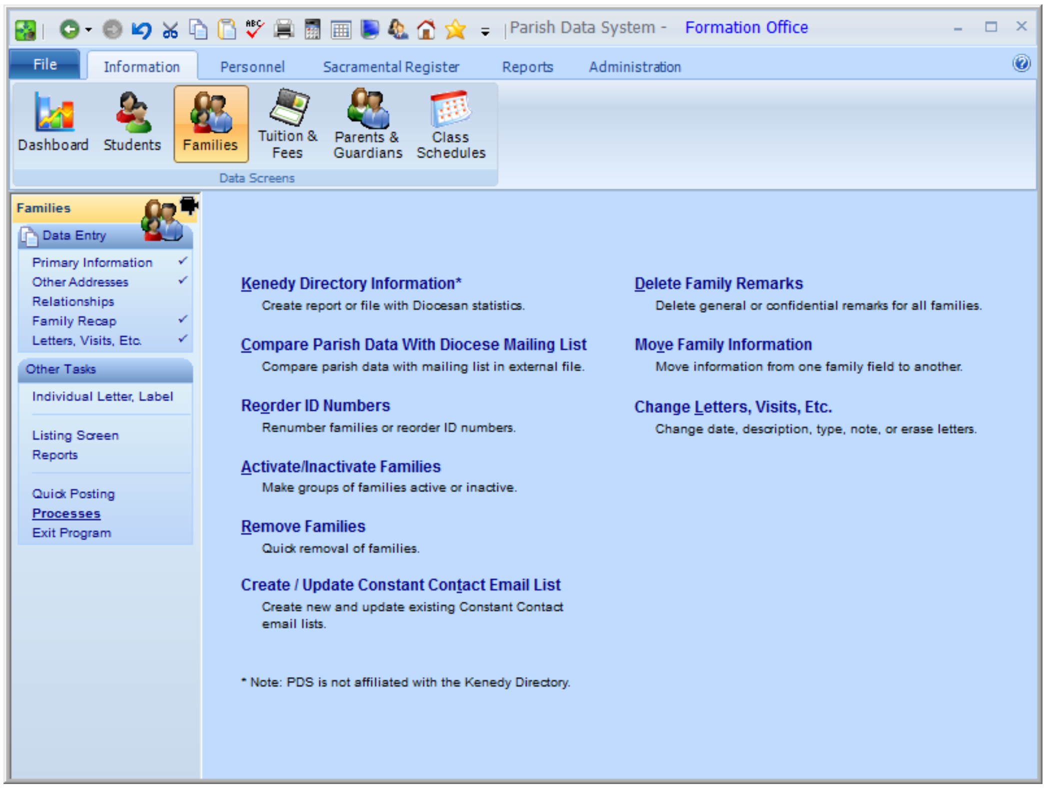

Fig. 9-10.

Compiling Kenedy Directory Information

With this process, you can compile your data for the annual Official Catholic Directory (the Kenedy Directory). In the navigation pane, click **Processes**, then **Kenedy Directory Information**.

You have three options for compiling your data. If you compiled your results for the previous year, you can select option one or two to display that information for comparison as you create this year's report. No matter which option you select, you can manually overwrite the results.

Which option should you select?

If you...	Select
... track all personal and sacramental data and want to automatically calculate your numbers for the Kenedy Directory	Option One
... use the previous year's information as a guide, but prefer to make manual or estimated counts for this year's results instead of automatic calculations	Option Two
... have never compiled your Kenedy data and don't want to automatically calculate your numbers for the Kenedy Directory	Option Three

Option One - Use the Data in the Program to Calculate Statistics

Select this option for accuracy and speed. The program compiles all of the statistical data that requires calculation: numbers of students, teachers, registered households, baptisms, and so on.

Useful Information

Remember that the program can't count data you don't track.

You can select this option even if you didn't use PDS to compile your Kenedy data last year, but the data fields that display last year’s results will be blank.

To automatically calculate statistics

1. Select **Use the Data in the program to calculate statistics**, and click **Next**.
2. Select the date range and options you want to use to determine what families and members are included in the calculations. Click **Next**.
3. Select whether to calculate registered households, individuals, and deaths. If you calculate individual Catholics, you must select at least one keyword that designates them as "Catholic." Click **Next**.
4. Select who you want to include and a calculation method for each. Click **Next**.
5. Select the sacraments you want to calculate as well as the keyword values for each. Click **Next**.
6. Enter information for the Kenedy Directory.

   Useful Information

   This information prints at the top of the final report and typically doesn't change from year to year. If you compiled your directory data last year, it displays in the left column.

7. Enter or update your information for the current year, and click **Next** to proceed through each window of the process. On the final window, the report generation options display.
8. Select whether you want to print your Kenedy data, create a file, or save the data for the following year. If you want to create a file, enter the path and file name.
9. Click **Finish**. If you print the report, the Print List dialog box displays.

Option Two - Start with Information Used Last Year

If you used PDS to generate your Kenedy information last year, select this option to view that data alongside the fields where you enter this year’s information. With this option, you must enter all statistical data manually.

To automatically enter information and manually enter statistical data

1. Select **Start with information used last year**, and click **Next**.
2. If necessary, update the information for the Kenedy Directory.

> **Useful Information**
>
> This information prints at the top of the final report and typically doesn't change from year to year. If you compiled your directory data last year, it displays in the left column.

3. Enter or update your information for the current year, and click **Next** to proceed through each window of the process. On the final window, the report generation options display.
4. Select whether you want to print your Kenedy data, create a file, or save the data for the following year. If you want to create a file, enter the path and file name.
5. Click **Finish**. If you print the report, the Print List dialog box displays.

Option Three - Start with a Blank Form and Enter All Information

You can select this option if you didn't use PDS to compile your data last year and want to manually enter your statistical data.

To manually enter information and statistical data

1. Select **Start with blank form and enter all information**, and click **Next**.
2. Enter information for the Kenedy Directory.

> **Useful Information**
>
> This information prints at the top of the final report and typically doesn't change from year to year.

3. Enter or update your information for the current year, and click **Next** to proceed through each window of the process. On the final window, the report generation options display.
4. Select whether you want to print your Kenedy data, create a file, or save the data for the following year. If you want to create a file, enter the path and file name.
5. Click **Finish**. If you print the report, the Print List dialog box displays.

Calculations for the Kenedy Directory window

Additional Field Information

Calculations for the Kenedy Directory (visible for Option One only)

- **Calculate the Number of Individual Catholics** — Calculates the number of individuals with one or more of the selected keywords on their record. This assumes that User Keyword 1 has been established as "Religion." You must select at least one option to continue.
- **Calculate Number of Deaths** — Calculates the number of deaths that occurred during the period. Only those individuals who have a date entered for **Deceased** are included.

- **Calculate Number of Brothers** — There are two ways to define a brother:
    - **Calculate based on "Bro" or "Brother" in Title** — The program counts members who are male and have "Bro.", "Bro", or "Brother" in the title of their name.

- **Calculate based on Personnel Type** — Specify the value you're using in the Personnel Types list to mean "brother".

- **Calculate Number of Sisters** — There are two ways to define a sister:
  - **Calculate based on "Sr." and "Sister" in Title** — The program counts members who are female and have "Sr.", "Sr.", or "Sister" in the title of their name.
  - **Calculate based on Personnel Type** — Specify the value you're using in the Personnel Types list to mean "sister".

- **Calculate Lay Teachers** — There are two ways to define a lay teacher:
  - **Calculate based on Teachers in School Office** — Select only if you share a common data file with PDS School Office. The program counts members who are entered as teachers in School Office and not designated inactive.
  - **Calculate based on Personnel Type** — Specify the value you're using in the Personnel Types list to mean "lay teacher".

- **Calculate Number of School Students** — There are two ways to define a school student:
  - **Calculate based on Students in School Office** — Select only if you share a common data file with PDS School Office. The program counts members who are entered as students in School Office and not designated **Inactive**.
  - **Calculated based on Member Keyword** — Specify the value you're using in the Member Keyword list to mean "school student."

- **Calculate Number of Cat/RE Students** — Calculates the number of catechetical or religious education students. There are two ways to define a catechetical/religious education student:
  - **Calculate based on Students in Formation Office** —The program counts members who are entered as students in Formation Office and not designated **Inactive**.
  - **Calculate based on Member Keyword** — Specify the value you're using in the Member Keyword list to mean "school student."

- **Calculate Number of Baptisms** — Since sacrament names can be customized, you must select which sacrament name is used for "baptism." Specify the latest age that a baptized child should be considered an infant. The default age is 7.
  An individual is included in this category if all of the following are true:
  - They have a sacrament matching the keyword you selected for "Baptism".
  - The status for the sacrament is **Approximate**, **Yes**, or blank.
  - The sacrament place matches the place you added for your parish (in other words, the sacrament occurred at your parish).
  - The date for the sacrament falls within the date range specified.

- **Calculate Number of Confirmations** — Since sacrament names can be customized, you must select which sacrament name is used for "first communion."
  An individual is included in this category if all of the following are true:
  - They have a sacrament matching the keyword you selected for "Confirmation".
  - The status for the sacrament is **Approximate**, **Yes**, or blank.
  - The sacrament place matches the place you added for your parish (in other words, the sacrament occurred at your parish).
  - The date for the sacrament falls within the date range specified.

- **Calculate Number of Marriages** — Since sacrament names can be customized, you must select which sacrament name is used for "marriage."
  An individual is included in this category if all of the following are true:
  - They have a sacrament matching the keyword you selected for "Marriage".
  - The status for the sacrament is **Approximate**, **Yes**, or blank.
  - The sacrament place matches the place you added for your parish (in other words, the sacrament took place at your parish).
  - The date for the sacrament falls within the date range specified.

> **Useful Information**
>
> If one or both partners in a marriage don't have one of the religion keywords that mean "Catholic," the marriage is counted as one interfaith marriage. Marital status works similarly, but uses the selected marital status selections instead of religion keywords.

Corrections and Additions Pages window

Additional Field Information

Information for the Kenedy Directory

- **Placement City** and other parish information — The placement city can be a city or county. Typically, the placement city and parish address don't change from year to year.
- **Parish Personnel** — You can enter up to six people this way.
- **Residency/Rectory** — Enter information for the rectory unless it's the same as the parish address. Select **Suppress from print** to notify Kenedy that you don't want this information included in the directory.
- **School Address** — If your organization is a school or has a school, enter its address information here. If you calculate the number of sisters, brothers, and school students, those figures also display in this window. Select **Suppress from print** to notify Kenedy that you don't want this information included in the directory.
- **Catechesis/Religious** — Enter Formation information. If you calculate the number of catechetical or religious education students, that figure displays on this page. Select **Suppress from print** to notify Kenedy that you don't want this information included in the directory.
- **Additional Addresses** — Enter any addresses that you haven't specified yet. Select **Suppress from print** to notify Kenedy that you don't want this information included in the directory.
- **Statistical Overview** — If you select to automatically calculate statistics, the totals display. At this point, you can overwrite the values manually if you believe they aren't accurate.
- **Vital Statistics** — These values are automatically calculated based on your previous selections and the information in your database.

> **Useful Information**
>
> The field **Received into Full Communion** isn't automatically calculated. You must enter the value manually.

Generate the Report window

Additional Field Information

__**Generate the Report**__

- **Create a File** — The data generated by the report is saved in the location you specify in the **File Name** field. The file is saved in Comma Separated Values (.csv) format which can be imported into a number of programs, such as spreadsheet applications. The file contains three columns: **Category**, **Old Value**, and **New Value**. Each line after the heading represents information from one line of the report. Although Kenedy doesn't currently accept digital files for the directory, this is a way for you to save a digital version of your information.

Comparing Data with Diocese Mailing List

With this process, you can compare your existing data for family names and addresses with similar information in another database, such as the one used by a newspaper or diocese. The process identifies families whose names and addresses match exactly, families where part of the information is different, or families in your internal or external data that aren't in the comparison list.

In addition, you can:

- Create an external mailing list.
- Accept changes to the families' names and addresses from the external file.
- Add new families that are in the external list but not in the data.
- Create and print a list of the differences including changes to addresses, families who have moved away, and new families.

In the navigation pane, click **Processes**, then click **Compare Parish Data With Diocese Mailing List**.

To compare information

1. Click  to locate the file to compare your data to. Select all options that apply to the file.
2. Select any options in order to limit which parish data you want to compare.
3. Select what you want to do with newly registered families and deleted families, and click **Next**.
4. The Comparison List displays. You can customize the list with the options available at the bottom of the window. Select the check box beside each record you want to include in the comparison.
5. Click **Next**. You can print the comparison list, make global changes to your data, and/or create a new file of the comparisons.
6. To customize your new file, click **File Options**. The Mail List Comparison Options dialog box displays. Specify additional options and phrases to describe the families for the exported files, and click **Close**.
7. Click **Finish**.

Reordering ID Numbers

With this process, you can change the ID numbers for families or reorganize the numbers in your database. You can free up unused numbers by identifying the ones being used by inactive individuals – that way, you can reassign them.

In the navigation pane, click **Processes**, and click **Reorder ID Numbers**.

> **Important Note**
>
> If you're sharing data with Church Office, and you selected the option in Formation to use Church ID/envelope numbers for family IDs, you cannot run this process in Formation Office. A message displays indicating to ask the PDS Church operator to reorder IDs.

To reorder ID numbers

1. Select either **Reorder by Family Name** or **Reorder by ID Number**, and click **Next**. For more information, see the Additional Field Information below.
2. Select the families and/or family members you want to reorder. Enter the starting ID number and the increment by which to increase the ID. For example, if you enter 10 for the new ID number and increase by 5, then the next ID would be 15.

   > **Useful Information**
   >
   > This process can't assign non-numeric values, leading zeros, or decimal values to the ID number.

3. Click **Next**.
4. Select which families you want to process. To add more conditions to the family selection, click **<Click here to add new condition>**. When you're finished, click **Next**.
5. Review the list of records. You can edit the **New ID** column. If you want to exclude any records from processing, clear the check box. When you're ready to reorder, click **Next**.
6. To reorder the ID numbers, click **Finish**.

Activating or Inactivating Family Records

With this process, you can change the Active/Inactive status of a group of families. For example, you may want to inactivate multiple family records after printing statements at year-end. In the navigation pane, click **Processes**, and click **Activate/Inactivate Families**.

To change family statuses automatically

1. Select the **Automatic Updating** method, and click **Next**.
2. Select whether to make families active or inactive, and click **Next**.
3. Make selections to filter the list of families whose records you want to activate or inactivate. When you're finished, click **Next**.
4. Review your list of families. If you want to exclude any records from processing, clear the check box. When you're ready to activate or inactivate the selected records, click **Next**.
5. To activate or inactivate the records, click **Finish**.

To change family statuses individually

1. Select the **Individual Entry** method, and click **Next**.
2. Select whether to make families active or inactive, and click **Next**.
3. Select a family, click **Add Family to List**, and repeat this process for each family. When you're finished, click **Next**.
4. Review your list of families. If you want to exclude any records from processing, clear the check box. When you're ready to activate or inactivate the selected records, click **Next**.
5. To activate or inactivate the records, click **Finish**.

Removing Multiple Families

With this process, you can remove multiple families from your database. There are three methods for doing this:

Removal Methods	Select to...
Use the Automatic Updating method to select a group of families	Simultaneously remove a group of families based on shared characteristics.
Use the Individual Entry method to select one family at a time	Group families that you select one-at-a-time. The group is then deleted simultaneously.
Remove all family records not in use by any program	View a list of families who are no longer visible in the program and aren't being used in any of your PDS Office programs.

Useful Information

You can only remove a record permanently from your shared database if another program is not using that record. For example, if you share data with Church Office, you may want to retain access to a family in Church Office but remove them from the list of current families in Formation Office.

In the navigation pane, click **Processes**, and click **Remove Families**.

To remove families

1. Select a removal method. For the first two methods, if you're sharing data, you must specify if you want the removed records to be available to other PDS programs, or whether to delete them permanently from your database and hard drive. If you're not sharing data, this option doesn't display. Click **Next**.
2. If you select the automatic updating method, select which families you want to remove. To filter the list of family selections, click **<Click here to add a new condition>**. When you're finished, click **Next**.
3. If you select the individual entry updating method, select a family, click **Add Family to List**, and repeat the process for each family. When you're finished, click **Next**.
4. Review your list of families. If you want to exclude any records from processing, clear the check box. When you're ready to remove the selected records, click **Next**.
5. To remove the records, click **Finish**.

About Creating Constant Contact Email List

PDS partners with Constant Contact® so you can build and maintain effective email lists for your parish. To create and update Constant Contact email lists, in the navigation pane, click **Processes**, and click **Create/Update Constant Contact Email List**.

Useful Information

You must have a Constant Contact account before you can create or update Constant Contact email lists within your PDS programs. To create a Constant Contact account, please visit www.parishdata.com/groupreach.

To create a new Constant Contact email list

1. Read the Introduction information. To begin the wizard, click **Next**.
2. Select which information to transfer to Constant Contact, and click **Next**.
3. On the Selection Information tab, make your selections, and click **Next**.
4. The Transfer List window displays. If you want to exclude any records from processing, clear the check box. When you're ready to post, click **Next**.
5. To add your Constant Contact account information to your PDS program, click **Add**. Enter your information in the Add New Account dialog box, and click **Save/Close**.
6. If you want to set your new account as the default account, click **Yes**.
7. Click **Next**. The Contact Lists Name dialog box displays, and you can view the list of contacts on your Constant Contact account.
8. In the Contact Lists Name dialog box, select a contact list, and click **Next**.
9. To send the selected information, click **Transfer**.
10. After the data transfer, click **Yes** to access the Constant Contact website. If you click **No**, you can transfer another list to Constant Contact or exit the wizard.

Deleting Family Remarks

With this process, you can remove the general or confidential remarks from the family's Primary Information window for multiple family records. In the navigation pane, click **Processes**, and click **Delete Family Remarks**.

To delete family remarks automatically

1. Select the **Automatic Updating** method, and click **Next**.
2. Select whether to delete general remarks or confidential remarks, and click **Next**.
3. Select which family records to remove remarks from. To add more conditions to the family selection, click **<Click here to add a new condition>**.
4. Select to include only active, only inactive, or all families, and click **Next**.
5. Review your list of families. If you want to exclude any records from processing, clear the check box. When you're ready to delete remarks from the selected records, click **Next**.
6. To delete the remarks, click **Finish**.

To delete family remarks individually

1. Select the **Individual Entry** method, and click **Next**.
2. Select whether to delete general remarks or confidential remarks, and click **Next**.
3. Select a family name, click **Add Family to List**, and repeat this process for each family. When you're finished, click **Next**.
4. Review your list of families. If you want to exclude any records from processing, clear the check box. When you're ready to delete remarks from the selected records, click **Next**.
5. To delete the remarks, click **Finish**.

Moving Family Information to another field

This process moves family data from one field to another. In the navigation pane, click **Processes**, and click **Move Family Information**.

To move family information

1. Select the families you want to include in the process, and click **Next**.
2. Under the Source section, in the **Move Data From The Following Field** drop-down list, select the source data you want to move.
   - If you move a memo field (a large text box, such as comments), select whether you want to move the entire field or a specific line.
   - To remove the original data and leave the source field empty, select **Blank Out <Source Field>**. If you do not select this check box, the field retains the original value and a copy will be placed in the destination field.
3. Under the Destination section, in the **Move Data To The Following Field** drop-down list, select where you want to move the data.
   - If you move a memo field, select whether to overwrite the existing data or add it to the end of the existing data.
4. Click **Move Fields**.
5. Before you move the fields, the program warns you that this process cannot be reversed. To move the data, click **Yes**. To cancel, click **No**.

6. In the Print dialog box, click **Preview** or **Print** to view the data moved.

Updating Family Interactions

With this process, you can update or erase the logged letter entry on multiple records simultaneously. For example, while conducting a pledge drive, you mailed two letters—the second with a pledge card. Soon, you begin receiving pledge cards from the families, and you want to update their records. In this case, you must change the Type for the sent letters to **Positive Response**. This makes it possible to locate and follow up on those who haven't responded by a certain date.

> **Useful Information**
>
> This process modifies existing entries in the Letters, Visits, Etc. window. It does not enter new lines.

Once processed, you can view updates in the Letters, Visits, Etc. section of an individual's window.

In the navigation pane, click **Processes**, and click **Change Letters, Visits, Etc**.

To update interaction details

1. Make your selections, and click **Next**.

   > **Useful Information**
   >
   > If you enter a description, you must enter it exactly as it displays in the Letters, Visits, Etc. section because it isn't a keyword field.

2. Select which family records to change. To add more conditions to the family selection, click **<Click here to add new condition>**.

3. Select whether to include only active, only inactive, or all families. When you're finished, click **Next**.
4. Select whether to assign the changes per family or to assign the changes simultaneously to all families. Optionally, you can enter the new date, description, type, and note. Blank fields are left as-is. Click **Next**.
5. Review your list of families. You can edit the **Date**, **Description**, **Type**, and **Note** columns. To delete entry information from the Letters, Visits, Etc. section, click **Erase this Line**. When you're ready to update the information, click **Next**.
6. To update the information, click **Finish**.

Tuition & Fees Processes

With these processes, you can change fund-related information in multiple records simultaneously. You can also make many of these changes to individual records.

> **Important Note**
>
> All processes alter data. We recommend backing up your data before proceeding with any of the processes.

To access these processes, on the Information tab, click **Tuition & Fees**, and in the navigation pane, click **Processes**.

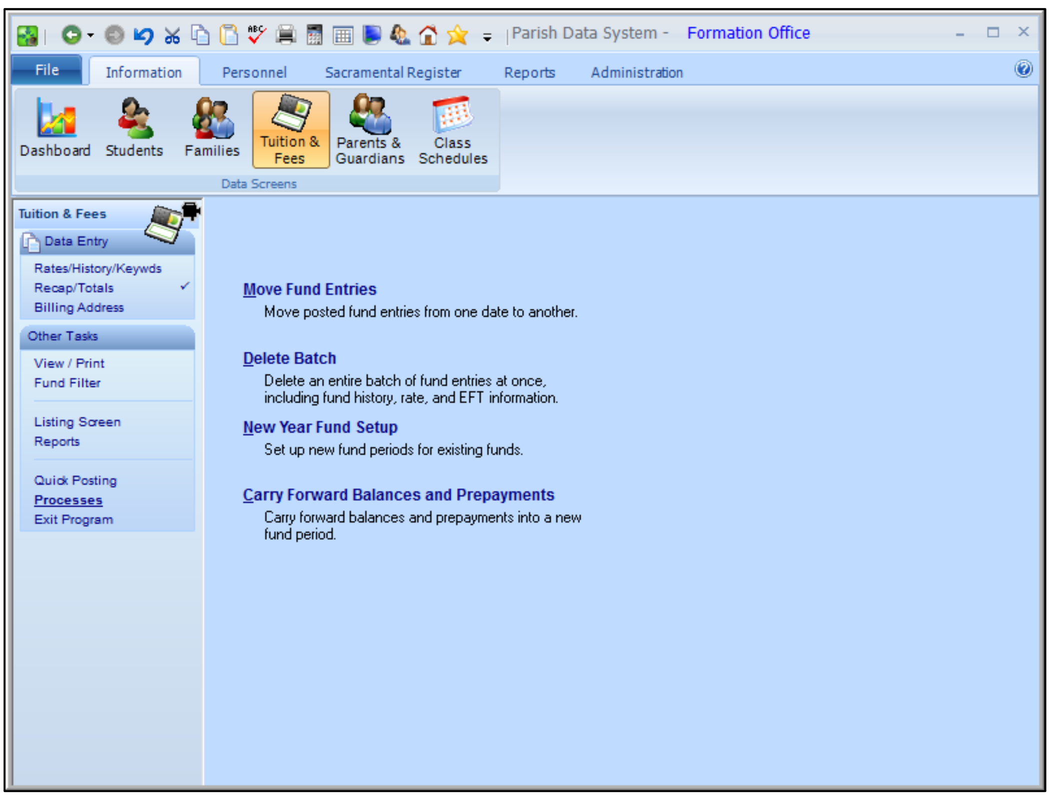

Fig. 9-11.

Move Fund Entries

This process moves fund history entries from one date to another, one activity to another, or one fund to another. Use this process if you make a mistake during the Payments/Donations quick posting.

In the navigation pane, click **Processes**, and click **Move Fund Entries**.

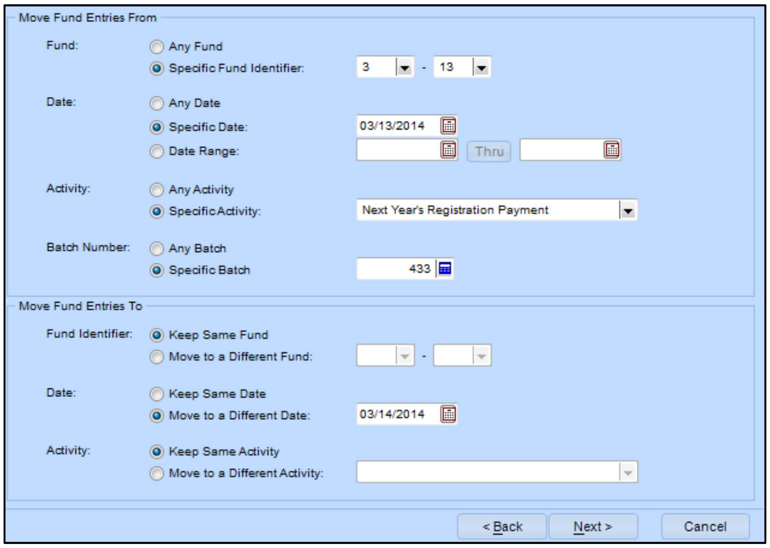

Fig. 9-12.

To move fund entries

1. Under the Move Fund Entries From section, select the current posting's **Fund Identifier**, **Date(s)**, and **Activity**, then indicate if the items are in a specific batch or in any batch.
2. Under the Move Fund Entries To section, select the new posting's **Fund Identifier**, **Date**, and **Activity**.
3. Click **Next**.
4. Review the list of proposed corrections, then click **Next**.
5. To move the corrected entries, click **Finish**. A new batch is created containing the moved items.

Delete Batch

Use this process to delete any quick posting batch.

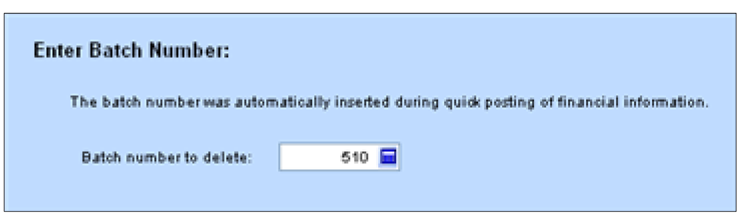

Fig. 9-13.

In the list of processes, click **Delete Batch**, then enter the batch number, and click **Delete/OK**.

New Year Fund Setup

This process creates a new fund period based on the current fund period, and sets up families to use it. You can include or reset terms, rates, and billing periods.

> **Important Note**
>
> You must back up your data before continuing with this process.

This process is commonly used at the end of the calendar year to set up new fund periods for the coming donation year, and also at the end of the formation or school year to set up new periods for registration and tuition.

You do not need to advance funds with multiple years until the end of the fund's last year. For example, fund 7-13 might have a date range of January 2013 through December 2020. You would only advance this fund (if necessary) at the end of 2020, not at the end of each year.

In the navigation pane, click **Processes**, and click **New Year Fund Setup**.

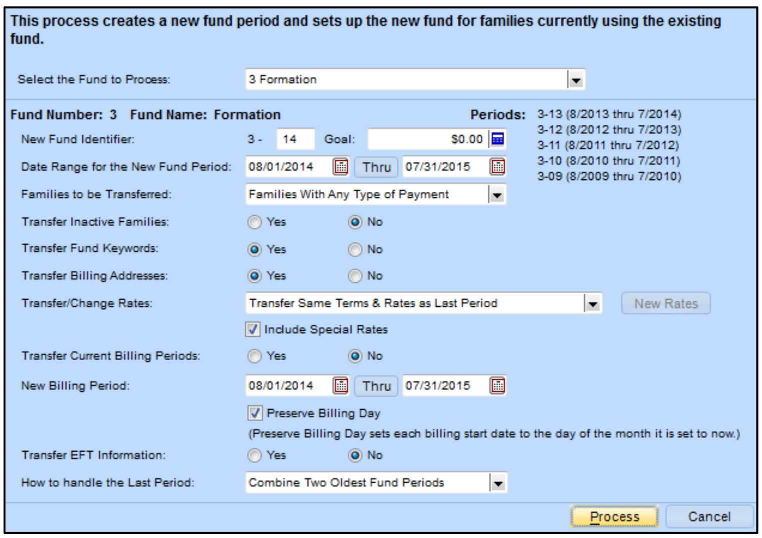

Fig. 9-14.

To create a new fund period based on the current fund period

1. Back up your data.
2. In the **Select the Fund to Process** drop-down list, select the fund you want to advance. The program fills in the settings based on the prior fund period.
3. Verify that the **New Fund Identifier**, **Goal**, **Date Range**, and **Families to be Transferred** settings match how you want to set up the new fund period.
4. If the fund has a Charge type, indicate if you want to transfer or change rates, and enter the **New Billing Period**.
5. Indicate how to handle the last fund period.
6. After you have verified or set all options for advancing the fund, click **Process**. When the process is complete, you have the option to advance another fund.

Carry Forward Balances

The Carry Forward Balances and Prepayments process helps you transfer balances, overpayments, prepayments, and pre-charges from one fund period to the next. With this process, you can:

- Carry forward balances from last year to the current fund period.
- Carry forward overpayments from last year to the current fund period.
- Carry forward payments made last year for the current fund period.
- Carry forward charges assigned last year for the current fund period.
- Process funds at the same time.

Be Careful!

All other users must exit the program before you continue.

Before you begin the process, you can print a worksheet that summarizes fund activities, balances, prepayments, and pre-charges. Print a worksheet for each fund you intend to process. The worksheet has blank lines for you to make notes.

In the navigation pane, click **Processes**, and click **Carry Forward Balances and Prepayments**.

To process carry forward balances

1. Select the fund to carry forward. The activities defined for the selected fund display under **Activity Details for Fund**. Make the appropriate selections.

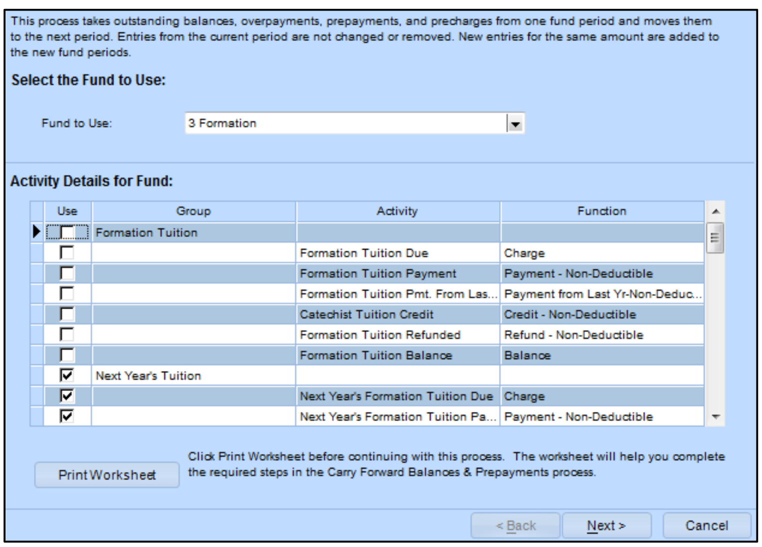

Fig. 9-15.

2. Click **Next**.
3. Select the fund period from the **Transfer Amounts from Old Fund Period** drop-down list.

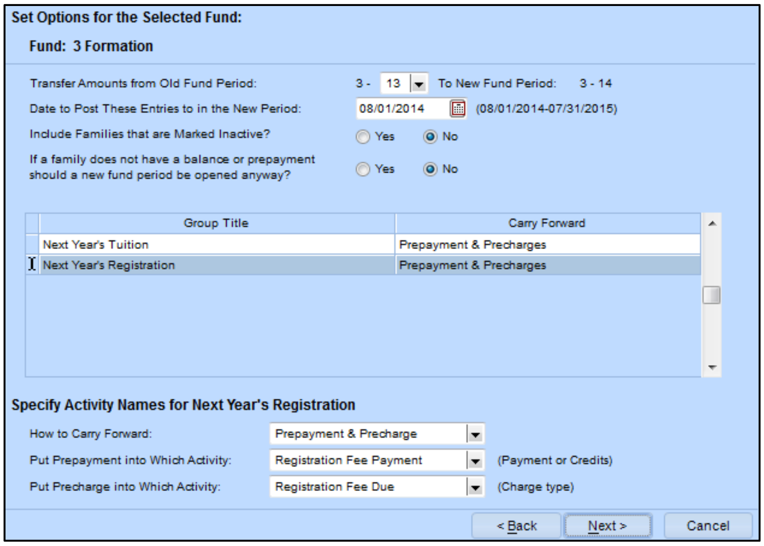

Fig. 9-16.

4. In the **Date to Post These Entries to in the New Period** field, enter a post date. This date must be within the date range of the new fund period.
5. To include inactive families and to add a new fund period when a family does not have a balance or prepayment, select **Yes** for each.
6. Click **Next**.
7. If you do not want to print a summary, clear the check box. To begin processing, click **Finish**.

About System Processes

There are a few processes, which may also impact Church Office and School Office which are system processes. To access these system processes, on the File menu, click **System Processes**.

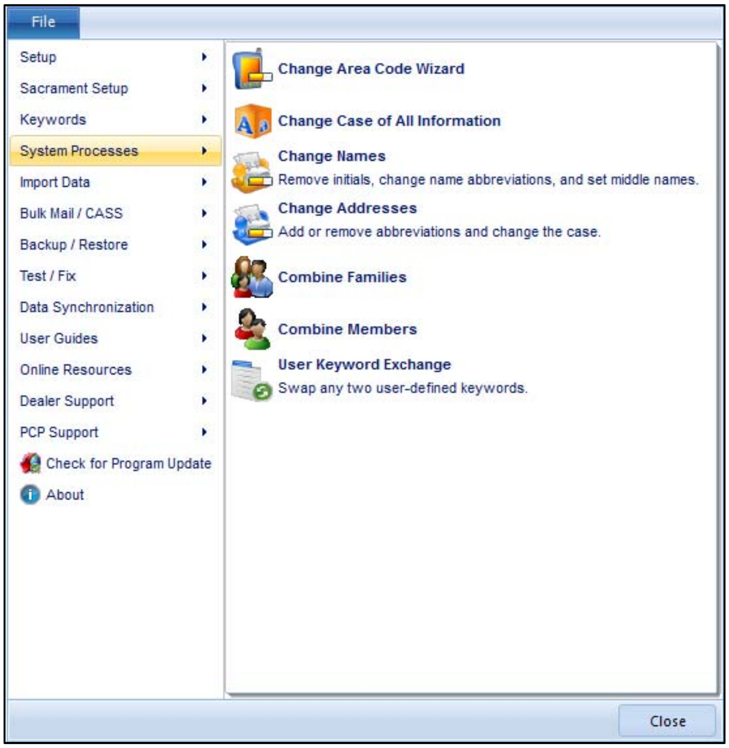

Fig. 9-17.

Changing Area Codes

When an existing area code is split into one or more new area codes, a list of the phone number exchanges involved is published. The Change Area Code wizard checks all phone number and fax number fields and updates them if necessary. If your program shares common data with another PDS Office program, this process changes the area codes and exchanges in all programs sharing the data.

On the File menu, click **System Processes** > **Change Area Code Wizard**. Select whether to process all area code exchanges at once or to process only some exchanges.

Be Careful!

This process alters data. We recommend backing up your data before proceeding.

To process all exchanges at the same time

1. Select Yes, process all of the exchanges at once, and click Next.
2. Enter the old area code and the new area code. Click Next.
3. Review your selections before processing. To process the changes, click Finish.
4. Print the reports. Click Close.

To process some of the exchanges and enter them manually

1. Select No, only some of the exchanges are being changed, and click Next.
2. Select Enter area code and exchanges manually, and click Next.
3. Enter the old area code and the new area code. Click Next.
4. Enter all exchanges affected by the area code change. It's not necessary to enter them in order.
5. After you enter the exchanges, click Next.
6. Select whether you want to save the area code information to a file. Click Next.
7. Review your selections before processing. To process the changes, click Finish.
8. Print the reports. Click Close.

To process some exchanges and load from a file

1. Select No, only some of the exchanges are being changed, and click Next.
2. Select Load the area code and exchanges from a file. Select the file, and click Next.
3. Review the old area code and the new area code, and edit if necessary. Click Next.
4. Add, edit, or delete any exchanges, and when you're finished, click Next.
5. Select whether you want to save the area code information to a file. Click Next.
6. Review your selections before processing. To process the changes, click Finish.
7. Print the reports. Click Close.

Changing the Case of All Information

With the Change Case of All Information process, you can change all the words in your data file to upper and lower case letters, or to all upper case letters.

The following items **do not** change when you run this process:

- State abbreviations in the City/State Names Keyword list and on all address fields are not changed. For example, AZ is **not** changed to Az.
- The Country Code, such as USA, in the City/State Names Keyword list is not changed.
- The AM and PM associated with the time of day is not changed.
- The abbreviation RE for Religious Education is not changed.

Be Careful!

This process alters data. We recommend backing up your data before proceeding.

On the File menu, click **System Processes** > **Change Case of All Information**. Select whether to change the case to upper and lower or to all upper case, and click **Yes** to process.

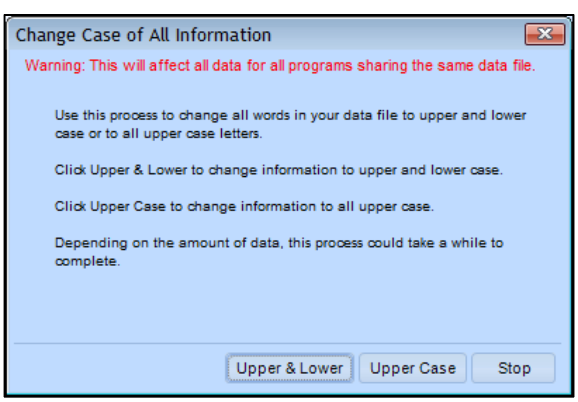

Fig. 9-18.

Changing How Names Display On Mailings

With this process, you can:

- Remove initials in mailing names, formal salutations, and informal salutations
- Change M/M to Mr. & Mrs. in mailing names
- Move middle names and initials to the Middle Name/Initial field

Be Careful!

This process alters data. We recommend backing up your data before proceeding.

On the File menu, click **System Processes** > **Change Names**. Select the name change options you want, and click **Process**.

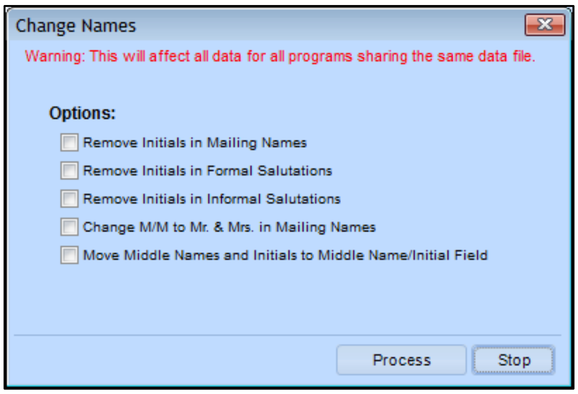

Fig. 9-19.

Changing the Format of Addresses

With this process, you can:

- Add abbreviations to specific addresses
- Remove abbreviations from certain addresses
- Change the case of the addresses

The following items **do not** change when you run this process:

- State abbreviations in the City/State Names Keyword list and on all address fields. For example, AZ is not changed to Az.
- The Country Code, such as USA, in the City/State Names Keyword list.

Be Careful!
This process alters data. We recommend backing up your data before proceeding.

On the File menu, click **System Processes** > **Change Addresses**. Select your format and case options and which addresses you want to change. When you're ready, click **Change Addresses**.

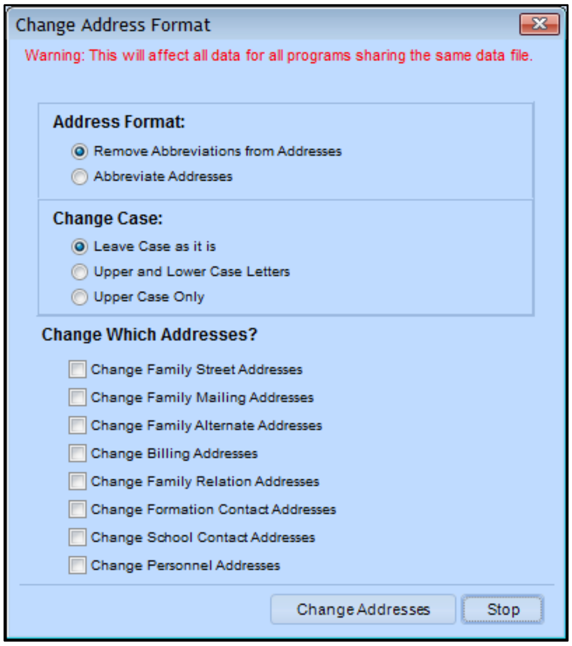

Fig. 9-20.

Locating and Combining Duplicate Families

With this process, you can locate and combine duplicate families. You can build a list of families and return to it at a later time.

On the File menu, click **System Processes** > **Combine Families**.

To search for duplicates and combine families

1. If you've never used this process before, the Build List Options window displays. Select the options you want to use to match duplicate families. If a list already exists in the program, continue to step 3.

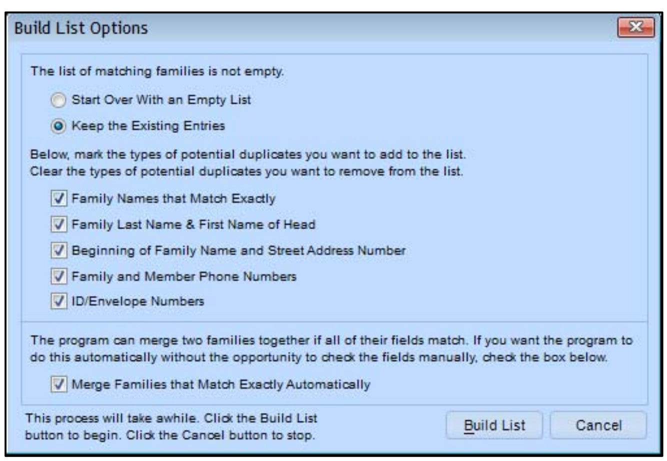

Fig. 9-21.

2. When you're ready, click **Build List**.
3. Click a family name in the grid to view the reason it was selected as a possible duplicate.

Useful Information

To conduct additional research about a family to determine which data set contains the correct information, double-click the family, then click **Print Worksheet**.

4. For each family, click **Review Details Before Combining Families**, and look for items displayed in red. Under Family or Matching Family, select the check box for the data you want to keep. The mismatched data is deleted.

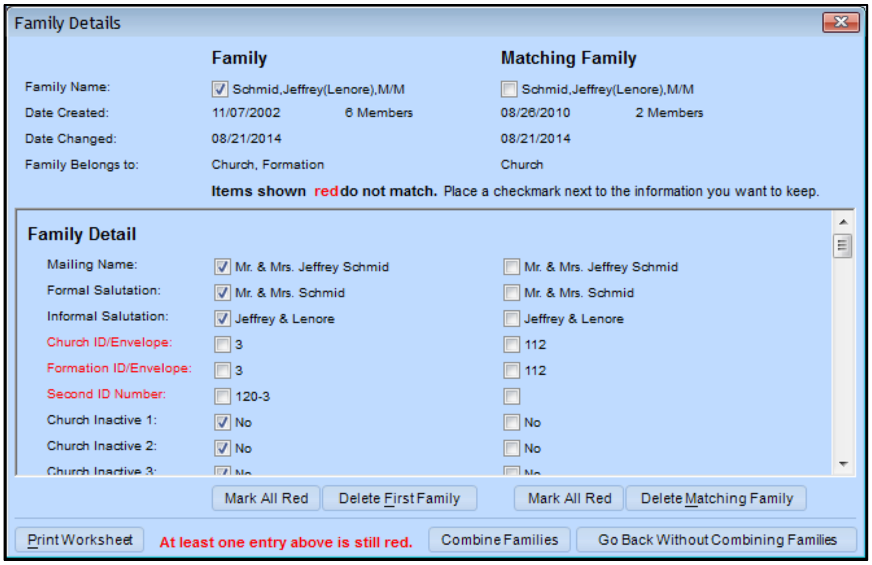

Fig. 9-22.

5. To combine the two families with the information you selected, click **Combine Families**.

To combine families manually

1. If you've never used this process before, the Build List Options window displays. Select the options you want to use to match duplicate families. If a list already exists in the program, continue to step 3.
2. When you're ready, click **Build List**.
3. Click the **Select Families Manually** tab. In the top grid, select the family you want to combine with another. In the bottom grid, select the matching family you want to combine.
4. Click **View Family Details**.
5. Look for items displayed in red. Under Family or Matching Family, select the check box for the data you want to keep. The mismatched data is deleted.
6. To combine the two families with the information you selected, click **Combine Families**.

Locating and Combining Duplicate Members

With this process, you can locate and combine duplicate members. You can build a list of members and return to it at a later time.

On the File menu, click **System Processes** > **Combine Members**.

To combine members

1. Select the family whose members you want to combine.

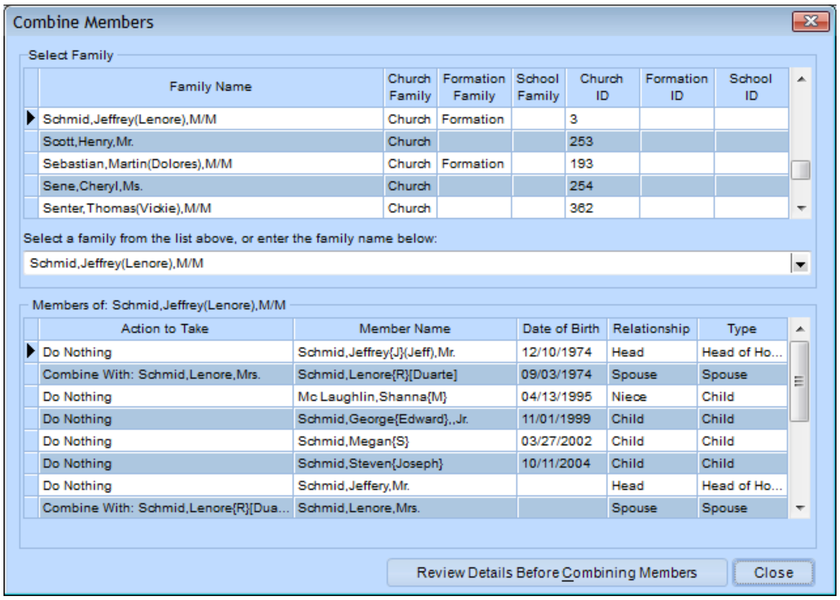

Fig. 9-23.

2. For each member, select an action to take.

> **Useful Information**
>
> If you need to conduct additional research about a member in order to determine which data set contains the correct information, click **Review Details Before Combining Members**, and click **Print Worksheet**.

3. For each member you want to combine, click **Review Details Before Combining Members**, and look for items displayed in red. Under Member or Matching Member, select the check box for the value you want to keep. The mismatched data is deleted.
4. To combine the two members, click **Combine Members**.

Exchanging User Keyword Positions

With this process, you can change the positions of the user keyword drop-down fields in the Personal section of the Members window.

On the File menu, click **System Processes** > **User Keyword Exchange**.

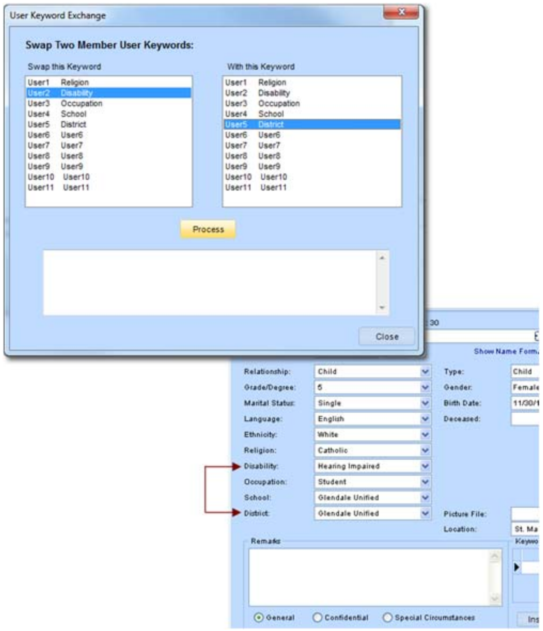

Fig. 9-24.

Be Careful!

This process alters data. We recommend backing up your data before proceeding.

Useful Information

Typical user keywords include Religion, Disability, and Occupation among others. To set up user keyword field names and values, on the File menu, click **Keywords** > **Member Keywords** > **User Keywords**.

To switch user keyword positions

1. Under Swap this Keyword, click the first keyword field you want to move.
2. Under With this Keyword, click the keyword to swap with the first.
3. Click **Process**.

Exercises

Exercise #1

Make all of the families from ID# 1 through 100 inactive.

Exercise #2

Promote the children in grades 1 through 12, marking those in 12th grade as **Young Adult**.

Exercise #3

For all members with the Ministry of Lector, change their status to **Actively Involved**.

Questions

Answer these questions pertaining to processes.

Q: Which process would you use to promote the entire 3rd Grade Formation class to the 4th Grade Formation class?

A: ____

Q: Mrs. Finch, the Confirmation catechist, retired in the middle of the year. What process would you use to assign her classes to Mr. Novak?

A: ____

Q: Which process would you use to add 50 new students from Church Office to Formation Office?

A: ____

Q: Which process would you use to set up fund 3, Tuition, for the next school year, and add that fund period to all the families that had it last year?

A: ____

Q: Which process would you use to combine duplicate family records?

A: ____

10: Importing Data

If you need to move your data from point A (your old program) to point B (PDS Office program), you can use the Import Data processes.

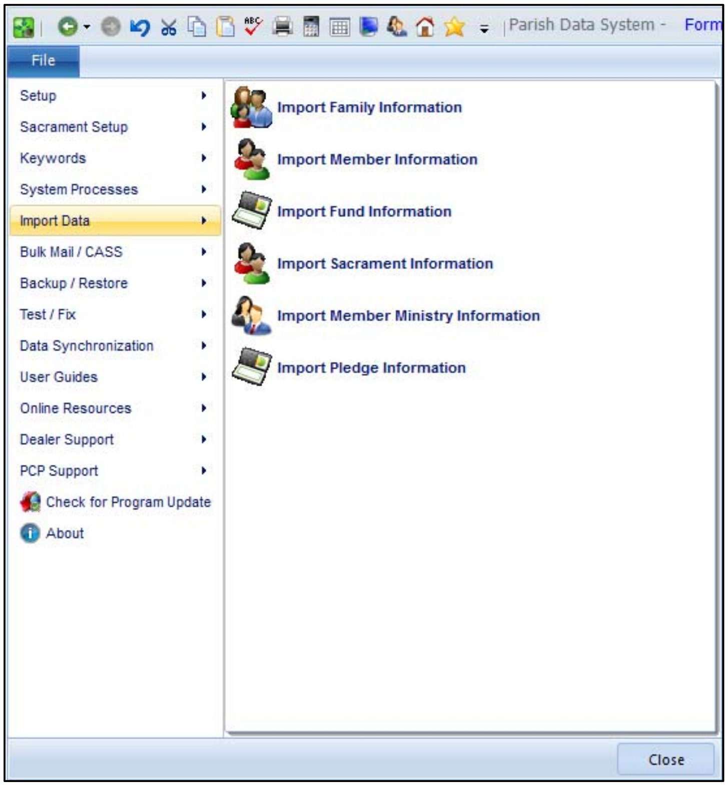

Fig. 10-1.

Requirements

To import data, your existing data must be in .csv file format. We strongly recommend that you include field names (headers) in the first record of your .csv file. In all of the Import Data processes, you have to select corresponding values for the PDS Office program fields, so if these values are labeled in a meaningful way, you can easily identify them.

Be Careful

Make sure you understand how to use import keys before using the import processes.

1 In the first record of your .csv file, use headers that describe your data.

2 When you select the .csv file, your records display in a table, using your header information.

3 On each tab, select the corresponding table value in each drop-down list.

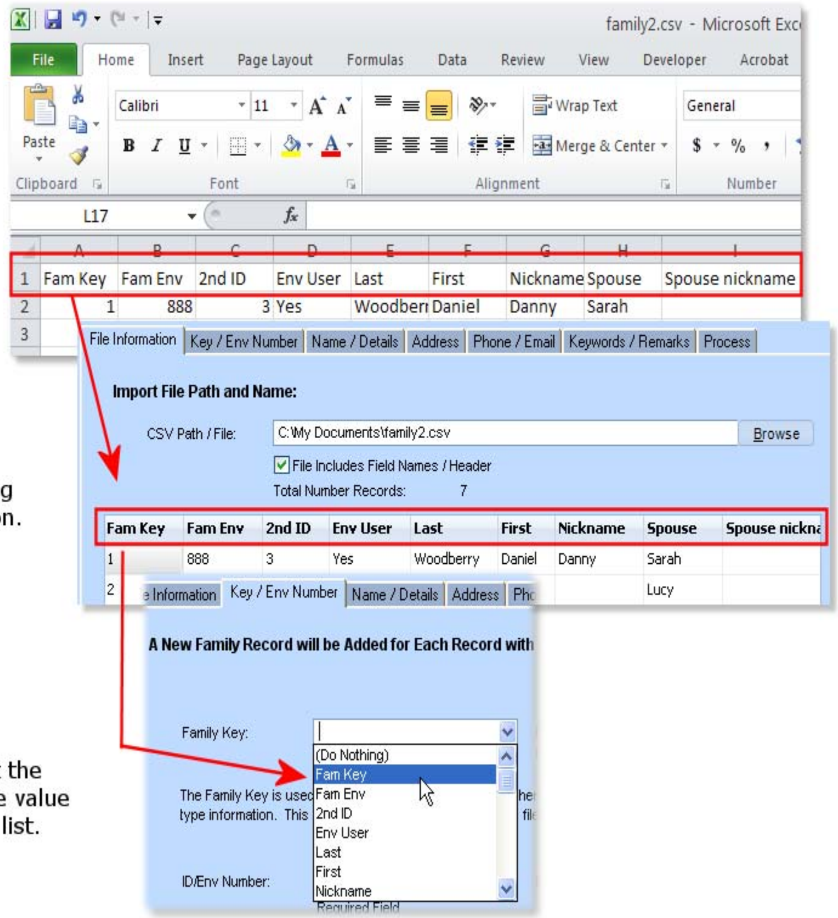

Fig. 10-2.

Understanding Import Keys

In order to use the import processes for more than a simple “one file” family import, some understanding of relational database concepts is required. The import processes are intended for those who can comfortably manipulate data in Excel or work with tables in Access.

Tip

After reviewing this section, if you don’t feel confident about how these apply to your file(s), contact the PDS Data Services Team (1-800-892-5202 ext. 7778) for assistance. Data Services fees vary based on the complexity of the import and whether the data needs to be refined and/or cleaned before importing.

To import a single file with clean, well-formatted family information, the key fields discussed in this section are not required. Key fields are typically needed when you process multiple files or when you process a single file multiple times. This way, the program can understand the relationship between the files.

Useful Information

A file can be processed multiple times if it contains information handled by different import processes. For example: a single file that contains both family and member details.

Importing Multiple Files Without Keys

If the files you're importing don't contain the necessary keys to link the information together, someone will need to spend the time to add this information to the files. If you have many records, you can contact our Data Services team to import the data for you. Data Services is staffed by trained professionals with years of experience migrating data between various systems.

Simple Family Example

Here is a simple family example with two files:

- FamilyBasicInfo.csv contains envelope number, name, and address information.
- FamilyHomePhones.csv contains the primary home phone number for each family.

FamilyBasicInfo.csv

FamKey	EnvNum	Last	First	Title	StreetAddress	City	State	Zip
46105	1	Van Loon	Jeff	Mr.	14430 N 19th Ave Apt 30	Phoenix	AZ	85023-6707
39715	2	Harcourt	Elizabeth	Mrs.	10194 E Paradise Dr	Scottsdale	AZ	85260-5915
45222	3	Schmid	Jeffrey	Mr. & Mrs.	11675 N 101st St	Scottsdale	AZ	85260-6054
64418	4	Abel	John	Mr. & Mrs.	1440 N Idaho Rd Unit 2091	Apache Junction	AZ	85219-2849
48279	5	Burke	Matthew	Mr. & Mrs.	444 S Higley Rd Apt 214	Mesa	AZ	85206-2186

Fig. 10-3.

FamilyHomePhones.csv

FamKey	Number	Unlisted
46105	(602) 278-9932 x 123	NO
39715	(602) 846-1937	YES
45222	(602) 238-3928	NO
64418	(602) 524-4456	NO

Fig. 10-4.

Matching the Data

Notice how every row in the FamilyHomePhones file contains a **FamKey** field that corresponds to the matching family (with the same **FamKey**) in the FamilyBasicInfo file. Both of your files must contain a column that has a unique identifier like **FamKey**. This identifier allows the phone number from the second file to be matched to the appropriate family in the first file. This is a much more reliable method than trying to match rows based on name. For example, there may be multiple families with the same name in your file, or the names might not be entered exactly the same in both files.

Identifying the Import Key

When you process the first file, identify the identifier column as the "Import Key". This stores the Import Key as a hidden field in the database that's used when you process the second file. When processing the second file, you are updating existing family records rather than creating new families. In the Import Family Information process, check the Advanced Options dialog box to enable the features for updating existing records.

Simple Member Example

This is similar to the simple family example where phone numbers from one file were matched to families from another. However, while each family usually has only one home phone number, there are typically several members in each family. There are several rows in the file with duplicate FamKey numbers.

MemberBasicInfo.csv

MemKey	FamKey	Last	First	Title	Gender	Type	Relationship	Date of Birth
64423	64418	Abel	Bessie	Mrs.	Female	Spouse	Wife	7/12/1974
64422	64418	Abel	John	Mr.	Male	Head of Household	Husband	4/12/1973
64485	64418	Abel	Victoria		Female	Child	Daughter	8/28/1996
53255	48279	Burke	Lara	Miss	Female	Child	Child	7/31/2003
53135	48279	Burke	Mary	Mrs.	Female	Spouse	Mother	8/14/1966
53132	48279	Burke	Matthew	Mr.	Male	Head of Household	Father	6/15/1973

Fig. 10-5.

Using Member Keys

Notice how all of the members in the Abel family have the same **FamKey**. When you load the member data from the file, you can do the following:

- Set the Family Key to indicate which family the member belongs to.
- Use the Member Key so future imports can be linked to the correct member (such as sacraments or ministry information).

Primary and Foreign Keys

The names of the key fields in a set of related files have specific names:

- **Primary Key** – Uniquely identifies a row in a table. Once you use a primary key in a table, it should not display again in that file. Other files reference the primary key.
- **Foreign Key** – Establishes a link to another row in a different table. Foreign keys in a related table reference the primary key in a main table.

In the simple family and member examples, the FamKey field is the primary key in the FamilyBasicInfo.csv file. In the FamilyHomePhones.csv and MemberBasicInfo.csv files, FamKey is the foreign key.

Import Results

The image below displays what the Family Primary Information window looks like after running the following processes using the example files:

- Import Family Information – FamilyBasicInfo.csv
- Import Family Information – FamilyHomePhones.csv
- Import Member Information – MemberBasicInfo.csv

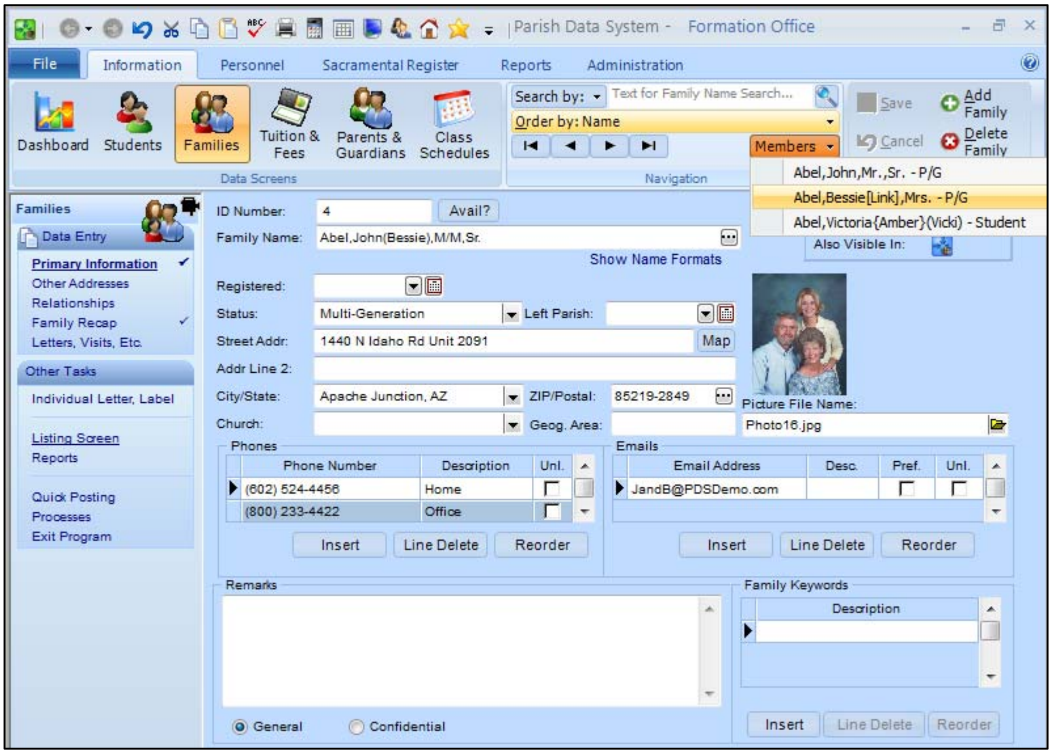

Fig. 10-6.

Member Sacrament Example

This example shows how information from the MemberBaptisms.csv file relates to the MemberBasicInfo.csv file.

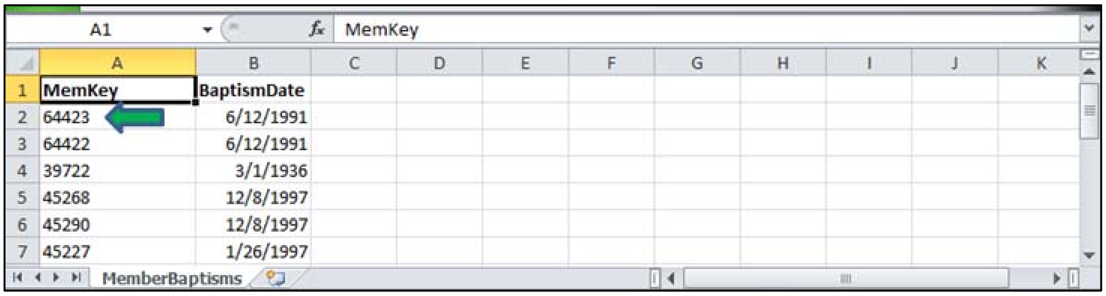

Fig. 10-7.

Notice how the MemKey in this file matches up with the MemKey from the basic member file. The first row references **MemKey 64423** which corresponds to **Bessie Abel**.

Data Relationship Diagram

The following diagram shows how the identifier fields, FamKey and MemKey, link the files.

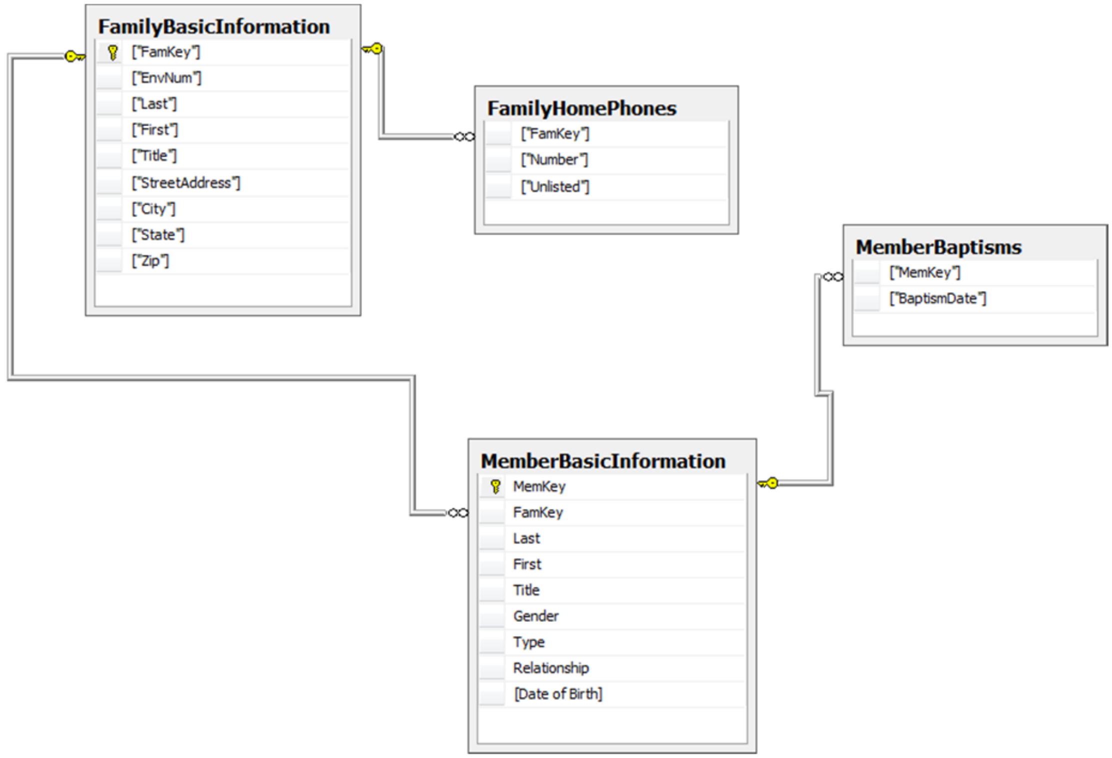

Fig. 10-8.

Ready to Import?

After reviewing this section, do you feel confident about how the import concepts apply to your own file(s)?

Yes – I'm Ready to Import

If you feel confident with the concepts discussed in this section, you can continue with the import processes.

Maybe – With Assistance

Contact the PDS Technical Support Team for assistance importing your information. You should have well-formatted .csv file(s) with a header record and clean data. Import keys are required if you need to run multiple import processes (family, member, sacrament, etc). You can only import to the fields available in the import processes.

No – I Want Someone Else To Do This For Me

If you don't feel confident with the concepts discussed in this section, contact the PDS Data Services Team at 1-800-892-5202 ext. 7778, and we will import the data for you. Fees apply.

Importing Family Information

You can use the Import Family Information process to import existing family data from a .csv file into your PDS Office program. On the File menu, click **Import Data** > **Import Family Information**.

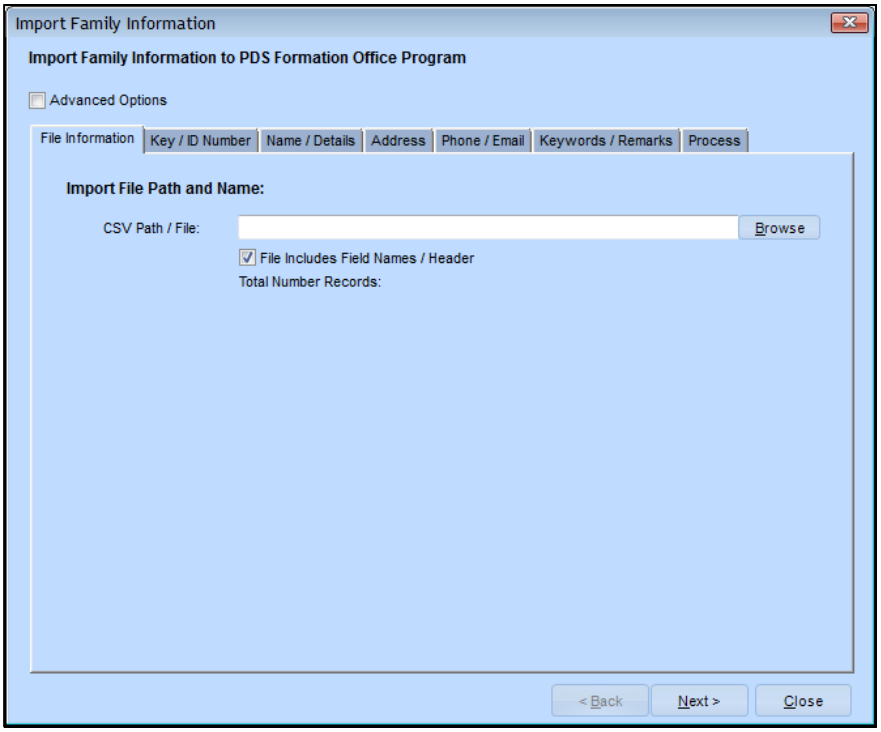

Fig. 10-9.

Before You Begin

Before you import family information, make sure your file contains a value that differentiates records from one another. We call this a "family key." For example, if your previous program assigned a number to each family, that value can be used as the family key. If you're also going to import member information, the family key must be the value that links the member record to its family record in your PDS Office program.

How This Process Works

Once you identify the .csv file, you will match the values in that file with your PDS Office program fields. There are a few required fields, but other than that, you only have to enter information for the data you want to import into your program.

No data is imported until you click **Begin Import** on the final tab. Your selections are automatically saved on each tab, so you can come back to this process at another time if needed.

To import family data

1. On the File menu, click **Import Data > Import Family Information**.
2. The backup dialog box displays if you haven't performed a daily backup. To make a backup, click **Yes**.

> **Important Note**
>
> This process alters data. We recommend backing up your data before proceeding.

3. The Import Family Information dialog box displays. On the File Information tab, click **Browse** to locate the .csv file. After you select a file and click **Open**, your data displays in the window.

> **Useful Information**
>
> We strongly recommend that you include field names/headers so it's easier to select the corresponding value from the drop-down lists on other tabs.

4. On each tab, select the appropriate values from the drop-down lists. For example, if the first column of your table is labeled "Fam Number" and you want that value to be the family key, then in the **Family Key** drop-down list, select **Fam Number**. For more information about fields on these tabs, refer to the Additional Field Information sections below.

> **Useful Information**
>
> If you have existing information in PDS and want to update or override that information with the data in your .csv file, select **Advanced Options** and adjust the settings on the **Key/ID Number** and **Keywords/Remarks** tabs.

5. On the final tab, before you import your data, click **Pre-Import Data Check**. This creates a file called "PreImportFamReport.txt" in your program's data folder.
6. Scroll through the items you're going to import to see if you need to make any adjustments.
7. When you're ready to import the data into your PDS Office program, click **Begin Import**.
8. Once the import is complete, a summary displays. This creates a file named "FamImportReport.txt" in your program's data folder.
9. When you're done, click **Finish**.

Additional Field Information

Additional field information is listed in the tabs below. Most fields are self-explanatory, so not all fields are documented.

Key/ID Number

Family Key — This value differentiates family records from one another. For example, if your previous program had a field called "Family Number" that assigned a number to each family, select that value here. This value must be unique to each family. If you're also going to import member data using the Import Member Information process, the family key must be the value that links the member record to the family record. You can select the same value for the **Family Key** and **ID Number** fields.

ID Number — This value represents the family's ID number. If any family records don't have an ID number, enter the starting number in the **Start New ID Numbers with** field. IDs are assigned to those records starting with this value.

Family is Active/Inactive — Only Yes/No or True/False values in the file are recognized. You must select either **Yes or True means Active** or **Yes or True means Inactive**.

Advanced Options

Useful Information

If you don't currently have any data in your PDS Office program, you don't need to use Advanced Options.

When selected, the following advanced options display in the window:

- **Add new records** — Imports all data as new records. If you have no existing data in your PDS Office program, select this option.
- **Update current data ONLY - do not add new families** — If you have data into your PDS Office program and only want to update that existing data, select this option.

  Useful Information

  If your import file contains records that already exist into your PDS Office program and you don't select this option, duplicate records are created.

- **Update current data and ADD new family record if Family Key not found** — If you have data in your PDS Office program and your import file contains updated information as well as new information, select this option. A new record is added if the family/member key isn't found.

If your import file contains information that you want to add to the existing data in your PDS Office program, you must match the values in the file with the record in PDS.

Select an option to indicate what value you want matched with existing PDS records:

- **Use the PDS Fam ID Number to match families** — Match the value you selected as the Family Key with the PDS family ID Number.
- **Use the Family Import Key to match families** — Match family records using the value you selected as the Family Key.
- **Use the PDS Family Unique ID Number (exported from PDS) to match families —** Match families using the unique, internal number **Fam Unique ID** assigned to each family by the program.

Name/Details

Alternately, Create Family Records Based on this Field — Select if you have a single field containing the entire family name rather than separate fields for each part of the family name.

Useful Information

If there's more than one name per line, the names must be separated by "&", "/", or "and." If your family name field is formatted differently, the data won't import correctly.

In Addition to Creating a Family Record, Create Member Record(s) — Creates member records based on the Family Name selections.

Tip

Don't select this option if you have a separate import file for member data. Instead, use the Importing Member Information process.

Family Status and Registration Date — Only dates formatted as MM/DD/YYYY in your file are recognized.

Address

Address found in separate fields — Select if your import file has separate values for **Street Number**, **Street Name**, and **Street Direction**.

- **City or City, State** — If your file has a single value for both the city and state, select that value in this drop-down list. Otherwise, select the city, then select the state in the **State** drop-down list.
- **Street Zip** and **Street Zip Plus 4** — If your file has a single value for the ZIP code (either the five-digit or the nine-digit format), select that value in the **Street Zip** drop-down list. If you have a separate value for the last four digits, select that value in the **Street Zip Plus 4** drop-down list.
- **Send No Mail** — If your file has a value indicating that the family doesn't want to receive mail, select that value. Only Yes/No or True/False values in the file are recognized.

Phone/Email

Additional Field Information

Default Area Code — Enter a default area code for any imported records that don't contain the area code information.

Phone 1, **Phone 2**, and **Phone 3** — Each Phone section represents a type of phone number. For example, Phone 1 can represent a family's home phone number, Phone 2 can represent a cell phone number, and Phone 3 can represent a fax number.

Unlisted — Only Yes/No or True/False values in the file are recognized.

Description — Select a value from either the first Description drop-down list or the second one based on the following:

- **Assign Import File Phone Desc** — If your import file has separate columns for each type of phone number, select the value from the first Description drop-down list. For example, if you want the Phone 1 section to represent the family's home phone, from the first drop-down list, select the value that corresponds to home phone number.
- **Assign PDS Phone Desc** — If you have Phone Description keywords set up in your PDS Office program (under General Keywords), select the value from the second Description drop-down list.

Email Over Mail — If your import file has a value indicating that the family prefers to receive emails over letters, select that value. Only Yes/No or True/False values in the file are recognized.

Keywords/Remarks

Family Keywords — If you have a family keyword field with a Yes/No or True/False value, you must enter a corresponding description. For example, if "Yes" describes a school family, then enter "School Family" in the **Description** field. This way, a keyword of "School Family: Yes" or "School Family: No" imports into your PDS Office program. The Description field is limited to 12 characters.

Family Pictures — Make sure that the picture file is in the appropriate folder in order for it to display in your PDS Office program. We recommend that you store picture files in a shared folder, such as **X:\PDSOffice\Pictures**.

Advanced Options

Useful Information

If you don't currently have any data in your PDS Office program, you don't need to use Advanced Options.

When selected, the following advanced options display in the window:

- **Add to existing remarks** — Keeps any existing remarks, and adds any remarks from your import file.
- **Replace current remarks with this content** — Removes any existing remarks, and adds the remarks from your import file.
- **Replace current remarks OR delete current remarks** — If your import file contains remarks, they replace the existing remarks in the program. If your file doesn't contain remarks, the existing remarks in the program are deleted.

Importing Member Information

You can use the Import Member Information process to import existing member data from a .csv file into your PDS Office program. On the File menu, click **Import Data > Import Member Information**.

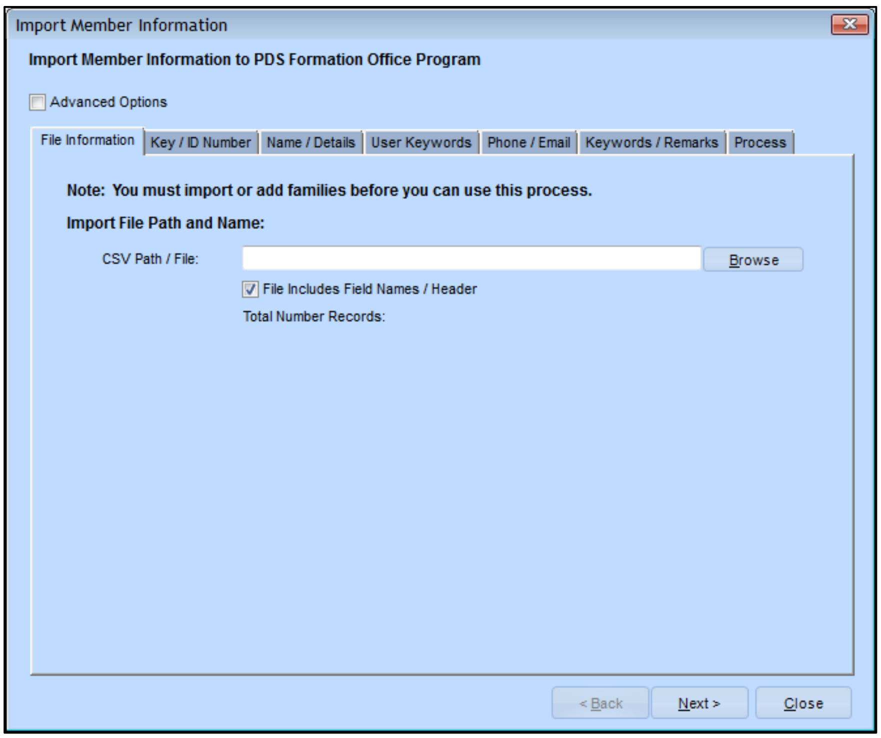

Fig. 10-10.

Before You Begin

To use this process, you must first import your family data. For more information, see Importing Family Information.

After you import family data, you can import member data. When you imported your family information, you assigned a value to the **Family Key** field. This value represents the field in your previous program that differentiated between family records. For example, if your previous program had a field called "Family Number" that assigned a unique number to each family record, this is the value you selected as the family key.

Each member record must contain the same **Family Key** value. This links the member information with the appropriate family record that you've already imported to your PDS Office program. Each record must also have a unique member key value that represents the field in your previous program that identified each member record. For example, if your previous program had a field called "Member ID" that assigned a unique number to each member record, this is the value you should select as the member key.

How This Process Works

Once you identify the .csv file, you will match the values in that file with your PDS Office program fields. There are a few required fields, but other than that, you only have to enter information for the data you want to import into your program.

No data is imported until you click **Begin Import** on the final tab. Your selections are automatically saved on each tab, so you can come back to this process at another time if needed.

To import member data

1. On the File menu, click **Import Data > Import Member Information**.
2. The backup dialog box displays if you haven't performed a daily backup. To make a backup, click **Yes**.

> **Important Note**
>
> This process alters data. We recommend backing up your data before proceeding.

3. The Import Member Information dialog box displays. On the File Information tab, click **Browse** to locate the .csv file. After you select a file and click **Open**, your data displays in the window.

> **Useful Information**
>
> We strongly recommend that you include field names/headers so it's easier to select the corresponding value from the drop-down lists on other tabs.

4. On each tab, select the appropriate values from the drop-down lists. For example, if the first column of your table is labeled "Member ID" and you want that value to be the member key, then in the **Member Key** drop-down list, select **Member ID**. For more information about the fields on these tabs, refer to the Additional Field Information sections below.

> **Useful Information**
>
> If you have existing information in PDS and want to update or override that information with the data in your .csv file, select **Advanced Options** and adjust the settings on the **Key/ID Number** and **Keywords/Remarks** tabs.

5. On the final tab, before you import the data, click **Pre-Import Data Check**. This creates a file called "PreImportMemReport.txt" in your program's data folder.
6. Scroll through the items you're going to import to see if you need to make any adjustments.
7. When you're ready to import the data into your PDS Office program, click **Begin Import**.
8. Once the import is complete, a summary displays. This creates a file named "MemImportReport.txt" in your program's data folder.
9. When you're done, click **Finish**.

Additional Field Information

Additional field information is listed in the tabs below. Most fields are self-explanatory, so not all fields are documented.

Key/ID Number

Family Key — This value connects the member to a family record. This value should be the same Family Key value you selected in the Import Family Information process.

Member Key — This value differentiates member records from one another. For example, if your previous program had a field called "Member ID" that assigned a number to each member, select that value here. This value must be unique to each member. If your import file doesn't have this information, you must create a separate field in the file and assign a unique value to each record.

Member ID Num — If your import file has a value that represents a unique member number, select that value here. This number cannot be the same as the Family ID Number.

Member is Active/Inactive — Only Yes/No or True/False values in your file are recognized. You must select either **Yes or True means Active** or **Yes or True means Inactive**.

Advanced Options

Tip

If you don't have any data in your PDS Office program, you do not need to use Advanced Options.

When selected, the following advanced options display in the window:

- **Add New Records** — Imports all data as new records. If you have no existing data in your PDS Office program, select this option.
- **Update Current Data ONLY - Do not add new members** — If you have data in your PDS Office program and only want to update that existing data, select this option.

  Useful Information

  If your import file contains records that already exist in your program and you don't select this option, duplicate records are created.
- **Update Current Data and ADD New Member record if Member Key not found** — If you have data in your PDS Office program and your import file contains updated information as well as new information, select this option. A new record is added if the family/member key isn't found.

If your import file contains information that you want to add to existing data in your PDS Office program, you must match the values in the file with the record in PDS.

Select an option to indicate what value you want matched with existing PDS family records:

- **Use the Family Import Key to match members to families** — Match members to family records using the value you selected as the Family Key.
- **Use the Family ID Number to match members to families** — During the Import Family Information process, if you selected **Use the PDS Fam ID Number to match families**, select this option when importing member data.

Select an option to indicate which value you want matched with existing PDS member records:

- **Use the Member Import Key to update members** — Update member records using the value you selected as the Member Key.
- **Use Member ID number to update members** — Update member records using the value you selected as the Member ID Number.
- **Use the PDS Member Unique ID Number (exported from PDS) to update —** Update member records using the unique, internal number **Mem Unique ID** assigned to each member by the program.

Name/Details

Birth Date and **Deceased Date** — Only dates formatted as MM/DD/YYYY in your file are recognized.

User Keywords

If your previous program contained user-defined keyword lists, you can import them. The first three keywords are already defined in PDS Office programs. Select the corresponding value for **Religion**, **Special Needs**, and **Occupation** in the drop-down lists.

Screen Labels and **Data —** Under **Screen Labels**, enter the keyword list name that exists in your program. For example, if your previous program had keywords for school district, in one of the keyword fields, enter "School District". Then, in the **Data** drop-down list, select the corresponding value from your file.

Phone/Email

Default Area Code — Enter a default area code for any imported records that don't contain the area code information.

Phone 1, **Phone 2**, and **Phone 3 —** Each Phone section represents a type of phone number. For example, Phone 1 can represent a member's home phone number, Phone 2 can represent a cell phone number, and Phone 3 can represent a fax number.

Unlisted — Only Yes/No or True/False values in your file are recognized.

Description — Select a value from either the first Description drop-down list or the second one based on the following:

- **From Import File** — If your import file has separate columns for each type of phone number, select the value from the first Description drop-down list. For example, if you want the Phone 1 section to represent the member's home phone, from the first drop-down list, select the value that corresponds to home phone number.
- **From PDS List** — If you have Phone Description keywords set up in your PDS Office program (under General Keywords), select the value from the second Description drop-down list.

Email 1, **Email 2**, and **Email 3 —** Each Email section represents a type of email address. For example, Email 1 can represent a member's business email, Email 2 can represent a personal email, and so on.

Type — If your import file has separate values for each type of email address, select the value from the first Type drop-down list. Otherwise, if you have Email Description Names keywords set up in your PDS Office program (under General Keywords), select the value from the second Type drop-down list.

Keywords/Remarks

Member Keywords — If you have a member keyword field with a Yes/No or True/False value, you must enter a corresponding description. For example, if "Yes" describes a school member, then enter "School Member" in the **Description** field. This way, a keyword of "School Member: Yes" or "School Member: No" imports into your PDS Office program. The Description field is limited to 31 characters.

Member Pictures — Make sure that the picture file is in the appropriate folder in order for it to display in your PDS Office program. We recommend that you store picture files in a shared folder, such as **X:\PDSOffice\Pictures**.

<u>**Advanced Options**</u>

Tip

If you don't have any data in your PDS Office program, you do not need to use Advanced Options.

When selected, the following advanced options display in the window:

- **Add to existing Remarks** — Keeps any existing remarks, and adds any remarks from your import file.
- **Replace current remarks with this content** — Removes any existing remarks, and adds the remarks from your import file.
- **Replace current remarks OR delete current remarks** — If your import file contains remarks, they replace the existing remarks in the program. If your file doesn't contain remarks, the existing remarks in the program are deleted.

Importing Fund Information

You can use the Import Fund Information process to import existing fund data from a .csv file into your PDS Office program. On the File menu, click **Import Data** > **Import Fund Information**.

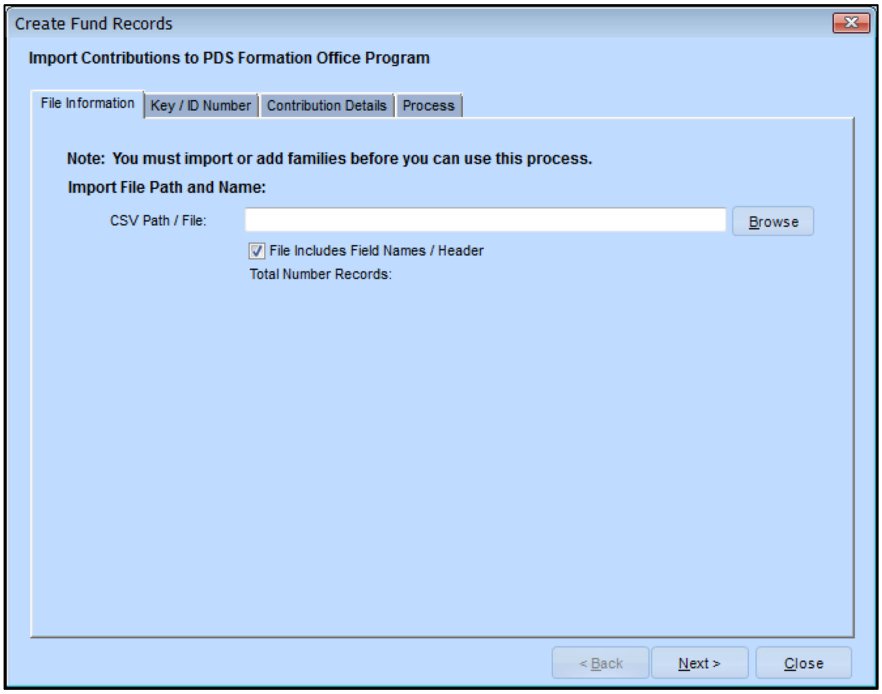

Fig. 10-11.

Before You Begin

Be Careful

You must set up the fund, fund periods, and fund activities in your PDS Office program before importing this information. If the fund isn't set up, the information won't import into the program.

To use this process, you must first import your family and member data. For more information, see Importing Family Information and Importing Member Information.

Before you import fund information, make sure your file contains a value that connects the fund information to the family or member. This is the value you selected during the Family and Member Import processes for the **Family/Member Key** or **ID Number** fields.

Useful Information

When importing pledge information, only the total pledge (mapped to an activity with a **Charge** function) is imported. To import terms and rates, use the Import Pledge Information process.

We recommend that you import the records in each .csv file to a single fund. However, if this isn't possible, you can run the process multiple times using the same .csv file, but select a different fund each time you run the process. If you run the process multiple times, the records that don't match the activities in the selected fund are not posted. This information is recorded in the Pre-Import and Import logs.

Be Careful

Never run the import process more than once for the same fund. Otherwise, duplicate records are posted.

How This Process Works

Once you identify the .csv file, you will match the values in that file with your PDS Office program fields. There are a few required fields, but other than that, you only have to enter information for the data you want to import into your program.

No data is imported until you click **Begin Import** on the final tab. Your selections are automatically saved on each tab, so you can come back to this process at another time if needed.

To import fund data

1. On the File menu, click **Import Data > Import Fund Information**.
2. The backup dialog box displays if you haven't performed a daily backup. To make a backup, click **Yes**.

   Important Note

   This process alters data. We recommend backing up your data before proceeding.

3. The Create Fund Records dialog box displays. On the File Information tab, click **Browse** to locate the .csv file. After you select a file and click **Open**, your data displays in the window.

   Useful Information

   We strongly recommend that you include field names/headers so it's easier to select the corresponding value from the drop-down lists on other tabs.

4. On each tab, select the appropriate values from the drop-down lists. For more information about the fields on these tabs, refer to the Additional Field Information sections below.
5. On the final tab, before you import the data, click **Pre-Import Data Check**. This creates a file called "PreImportContribErrors.csv" in your program's data folder.
6. Scroll through the items you're going to import to see if you need to make any adjustments.
7. When you're ready to import the data into your PDS Office program, click **Begin Import**.
8. Once the import is complete, a summary displays. This creates a file named "ContribErrors.csv" in your program's data folder.
9. When you're done, click **Finish**.

Additional Field Information

Additional field information is listed in the tabs below. Most fields are self-explanatory, so not all fields are documented.

Key/ID Number

Use this Key from Import File — This value connects the contribution to the family or member. For **Where is the Import Key in PDS?**, select an option to match this key to the corresponding value in your program:

- **Family/Member ID Number** — Match contributions to family or member records using the PDS Family or Member ID Number.
- **Family 2nd ID Number** — If you have 2nd ID numbers set up in your PDS Office program, match contributions to family records using this value.
- **Family Unique Identifier** — Match contributions to family records using the unique, internal number **Fam Unique ID** assigned to each family by the program. If you select this option, you must use an export report with the Family Unique ID field as your import file.
- **Family Key** — Match contributions to family records using the value you selected as the Family Key.
- **Member Unique Identifier** — Match contributions to member records using the unique, internal number **Mem Unique ID** assigned to each member by the program. If you select this option, you must use an export report with the Member Unique ID field as your import file.
- **Member Key** — Match contributions to member records using the value you selected as the Member Key.

Assign contribution to member — If you selected to match the key to the PDS Member Key or to the Member Unique Identifier, you can associate the contribution to a specific family member.

Contribution Details

Transaction Date — Only dates formatted as MM/DD/YYYY in your file are recognized.

Activity Name — The selected fund's activity name must already be set up in your PDS Office program in order for this information to import correctly.

Batch — You can select whether to import the batch number from your file or to automatically assign the next available batch number in the program.

Importing Sacrament Information

You can use the Import Sacrament Information process to import existing sacrament data from a .csv file into your PDS Office program. On the File menu, click **Import Data** > **Import Sacrament Information**.

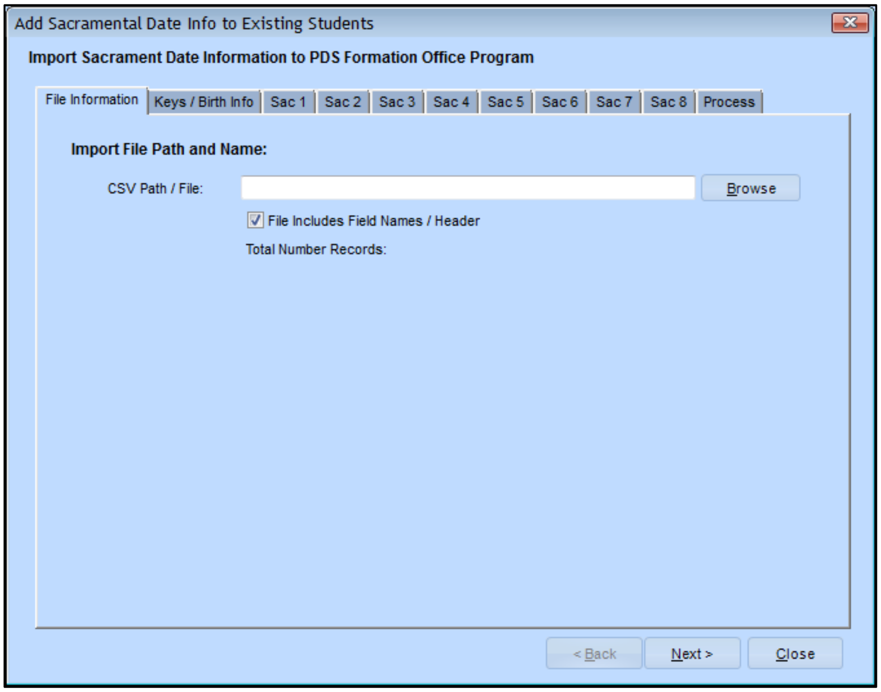

Fig. 10-12.

Before You Begin

In order to use this process, you must first import your family and member data. For more information, see Importing Family Information and Importing Member Information.

Before you import sacrament information, make sure your file contains a value that connects the sacrament information to the member. This is the value you selected during the Member Import process for the **Member Key** field.

You can import sacrament information from more than one .csv file.

How This Process Works

Once you identify the .csv file, you will match the values in that file with your PDS Office program fields. There are a few required fields, but other than that, you only have to enter information for the data you want to import into your program.

No data is imported until you click **Begin Import** on the final tab. Your selections are automatically saved on each tab, so you can come back to this process at another time if needed.

To import sacrament data

1. On the File menu, click **Import Data > Import Sacrament Information**.
2. The backup dialog box displays if you haven't performed a daily backup. To make a backup, click **Yes**.

Important Note

This process alters data. We recommend backing up your data before proceeding.

3. The Add Sacramental Date Info dialog box displays. On the File Information tab, click **Browse** to locate the .csv file. After you select a file and click **Open**, your data displays in the window.

Useful Information

We strongly recommend that you include field names/headers so it's easier to select the corresponding value from the drop-down lists on other tabs.

4. On the **Keys/Birth Info** tab, select the corresponding values. For more information about the tabs in this window, see the Additional Field Information sections below.
5. Each **Sac** tab represents a different sacrament. On each tab, select a sacrament and its appropriate values.
6. On the final tab, before you import the data, click **Pre-Import Data Check**. This creates a file called "PreImportSacImportReport.txt" in your program's data folder.
7. Scroll through the items you're going to import to see if you need to make any adjustments.
8. When you're ready to import the data into your PDS Office program, click **Begin Import**.
9. Once the import is complete, a summary displays. This creates a file named "SacImportReport.txt" in your program's data folder.
10. When you're done, click **Finish**.

Additional Field Information

Additional field information is listed in the tabs below. Most fields are self-explanatory, so not all fields are documented.

Keys/Birth Info

Use this Key from Import File — This value connects the sacrament information to the student. For **Where is the Import Key in PDS?**, select an option to match this key to the corresponding value in your program:

- **Student ID Number** — Match sacraments to student records using the PDS Student ID Number.
- **Student Key** — Match sacraments to student records using the value you selected as the Student Key.
- **Student Unique Identifier** — Match sacraments to student records using the unique, internal number **Student Unique ID** assigned to each student by the program. If you select this option, you must use an export report with the Student Unique ID field as your import file.

Default Area Code — Enter a default area code for any imported records that don't contain the area code information.

Birth Information — Select **Overwrite if already present** if you're updating the existing sacramental records in your PDS Office program. Any existing data is removed.

Sacrament Information — If you select to overwrite sacrament information if it is already present in your PDS Office program, any existing data is removed.

Sac tabs

On each Sac tab, select a sacrament and enter information about it.

Sacrament — The items in this drop-down list are from your Sacrament Date Names keyword list. To add or edit keywords, on the File menu, click **Keywords** > **Student/Parent/Guardian Keywords > Sacrament Date Names**.

Prof. of Faith, **Verified**, and **Cert. on File** — For these fields, only Yes/No or True/False values in your file are recognized. The Prof. of Faith field only displays if you select **Baptism** as the sacrament.

Date/Date of Prof — Only dates formatted as MM/DD/YYYY in your file are recognized. The Date of Prof field only displays if you select **Baptism** as the sacrament.

Extra Info — This value represents the sacramental name. For Baptism, this is the baptismal name, for Confirmation, this is the confirmation name, and for Marriage, this is the spouse's name.

Importing Member Ministry Information

You can use the Import Member Ministry Information process to import existing member ministry data from a .csv file into your PDS Office program. On the File menu, click **Import Data** > **Import Member Ministry Information**.

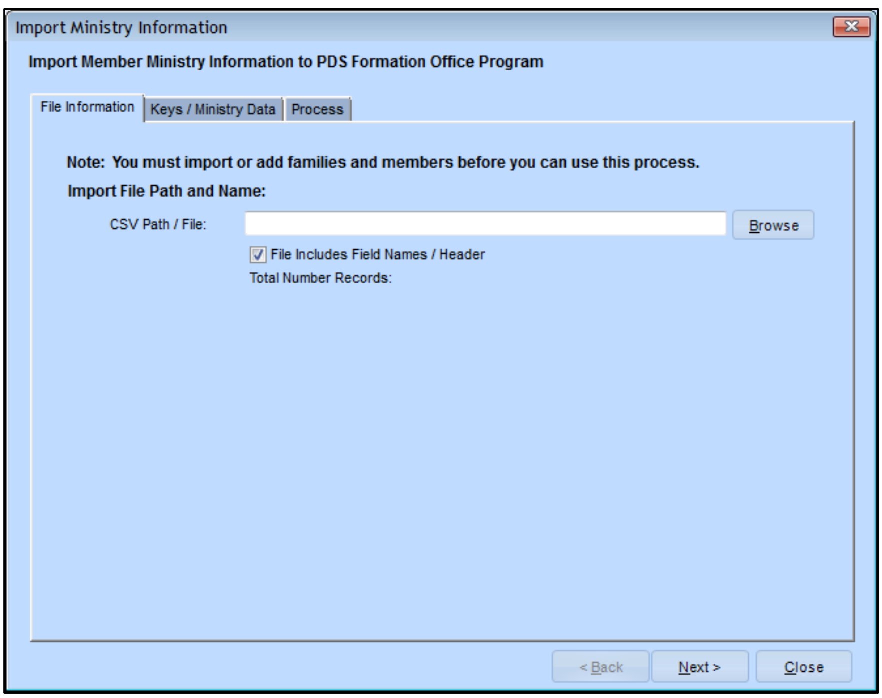

Fig. 10-13.

Before You Begin

In order to use this process, you must first import your member data. For more information, see Importing Member Information.

After you import member data, you can import member ministry data. When you imported your member information, you assigned a value to the **Member Key** field. This value represents the field in your previous program that differentiated between member records. For example, if your previous program had a field called "Member Number" that assigned a unique number to each member record, this is the value you selected as the **Member Key**.

Each member ministry record must contain the same **Member Key** value. This links the member ministry information with the appropriate member record that you've already imported to your PDS Office program. Each record must also have a unique **Member Key** value that represents the field in your previous program that identified each member record. For example, if your previous program had a field called "Member ID" that assigned a unique number to each member record, this is the value you should select as the member key.

How This Process Works

Once you identify the .csv file, you will match the values in that file with your PDS Office program fields. There are a few required fields, but other than that, you only have to enter information for the data you want to import into your program.

No data is imported until you click **Begin Import** on the final tab. Your selections are automatically saved on each tab, so you can come back to this process at another time if needed.

To import ministry data

1. On the File menu, click **Import Data > Import Member Ministry Information**.
2. The backup dialog box displays if you haven't performed a daily backup. To make a backup, click **Yes**.

> **Important Note**
>
> This process alters data. We recommend backing up your data before proceeding.

3. The Import Ministry Information dialog box displays. On the File Information tab, click **Browse** to locate the .csv file. After you select a file and click **Open**, your data displays in the window.

> **Useful Information**
>
> We strongly recommend that you include field names/headers so it's easier to select the corresponding value from the drop-down lists on other tabs.

4. On the **Keys/Ministry Data** tab, select the appropriate values. For more information about the fields on this tab, refer to the Additional Field Information section below.
5. On the final tab, before you import the data, click **Pre-Import Data Check**. This creates a file called "PreImportMemReport.txt" in your program's data folder.
6. Scroll through the items you're going to import to see if you need to make any adjustments.
7. When you're ready to import the data into your PDS Office program, click **Begin Import**.
8. Once the import is complete, a summary displays. This creates a file named "MemImportReport.txt" in your program's data folder.
9. When you're done, click **Finish**.

Additional Field Information

Additional field information is listed in the tabs below. Most fields are self-explanatory, so not all fields are documented.

Keys/Ministry Data

Member Key — This value connects the ministry information to the member. For **Where is the Import Key in PDS?**, select an option to match this key to the corresponding value in your program:

- **Member ID Number** — Match ministries to member records using the PDS Member ID Number.
- **Member Key** — Match ministries to member records using the value you selected as the Member Key.
- **Member Unique Identifier** — Match ministries to member records using the unique, internal number **Mem Unique ID** assigned to each member by the program. If you select this option, you must use an export report with the Member Unique ID field as your import file.

Start Date and **End Date** — Only dates formatted as MM/DD/YYYY in your file are recognized.

Importing Pledge Information

You can use the Import Pledge Information process to import existing pledge data (including terms and rates) from a .csv file into your PDS Office program. On the File menu, click **Import Data** > **Import Pledge Information**.

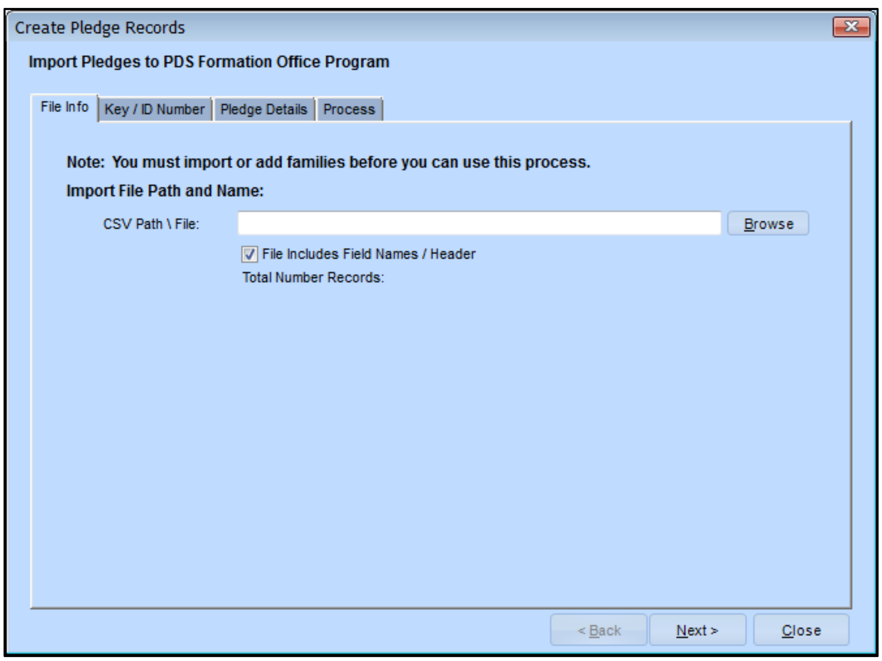

Fig. 10-14.

Before You Begin

Be Careful

You must set up the associated fund, fund periods, and fund activities in your PDS Office program before importing pledge information. If funds aren't set up, the pledges won't import into the program.

To use this process, you must first import your family and member data. For more information, see Importing Family Information and Importing Member Information.

Before you import pledge information, make sure your file contains a value that connects the pledge information to the family or member. This is the value you selected during the Family and Member Import processes for the **Family/Member Key** or **ID Number** fields.

We recommend that you import the records in each .csv file to a single fund. However, if this isn't possible, you can run the process multiple times using the same .csv file, but select a different fund each time you run the process. If you run the process multiple times, the records that don't match the activities in the selected fund are not posted. This information is recorded in the Pre-Import and Import logs.

Be Careful

Never run the import process more than once for the same fund. Otherwise, duplicate records are posted.

How This Process Works

Once you identify the .csv file, you will match the values in that file with your PDS Office program fields. There are a few required fields, but other than that, you only have to enter information for the data you want to import into your program.

No data is imported until you click **Begin Import** on the final tab. Your selections are automatically saved on each tab, so you can come back to this process at another time if needed.

To import pledge data

1. On the File menu, click **Import Data > Import Pledge Information**.
2. The backup dialog box displays if you haven't performed a daily backup. To make a backup, click **Yes**.

   Important Note

   This process alters data. We recommend backing up your data before proceeding.

3. The Create Pledge Records dialog box displays. On the File Info tab, click **Browse** to locate the .csv file. After you select a file and click **Open**, your data displays in the window.

   Useful Information

   We strongly recommend that you include file names/headers so it's easier to select the corresponding value from the drop-down lists on other tabs.

4. On each tab, select the appropriate values from the drop-down lists. For more information about the fields on these tabs, refer to the Additional Field Information sections below.
5. On the final tab, before you import the data, click **Pre-Import Data Check**. This creates a file called "PreImportPledgeReport.txt" in your program's data folder.
6. Scroll through the items you're going to import to see if you need to make any adjustments.
7. When you're ready to import the data into your PDS Office program, click **Begin Import**.
8. Once the import is complete, a summary displays. This creates a file named "PledgeImportReport.txt" in your program's data folder.
9. When you're done, click **Finish**.

Additional Field Information

Additional field information is listed in the tabs below. Most fields are self-explanatory, so not all fields are documented.

Key/ID Number

Use this Key from Import File — This value connects the pledge information to the family or member. For **Where is the Import Key in PDS?**, select an option to match this key to the corresponding value in your program:

- **Family/Member ID Number** — Match pledges to family or member records using the PDS Family or Member ID Number.
- **Family 2nd ID Number** — If you have 2nd ID numbers set up in your PDS Office program, match pledges to family records using this value.
- **Family Unique Identifier** — Match pledges to family records using the unique, internal number **Fam Unique ID** assigned to each family by the program. If you select this option, you must use an export report with the Family Unique ID field as your import file.
- **Family Key** — Match pledges to family records using the value you selected as the Family Key.
- **Member Unique Identifier** — Match pledges to member records using the unique, internal number **Mem Unique ID** assigned to each member by the program. If you select this option, you must use an export report with the Member Unique ID field as your import file.
- **Member Key** — Match pledges to member records using the value you selected as the Member Key.

Assign Pledge to Member— If you selected to match the key to the PDS Member Key or to the Member Unique Identifier, you can associate the pledge to a specific family member.

Fund Number to Post Pledges — The fund must already be set up in your PDS Office program in order for this information to import correctly.

Pledge Details

Begin Date and **End Date** — Only dates formatted as MM/DD/YYYY in your file are recognized.

Batch — You can select whether to import the batch number from your file or to automatically assign the next available batch number in the program.

Batch Date — You can select whether to import the batch date from your file or to assign the batch date. If you select to assign a batch date, it defaults to today's date, but you can change it.

Creating an Export File

If you want to use the Family/Member/Student Unique ID options in any of the import processes, you must first create an export report with one or more of these fields. You can then use this export report as your import file during the import processes.

To create an export report with Family and/or Member Unique IDs

1. On the Report tab, click **All Reports**, and click **Add**.
2. Click **Export** to create an export report.
3. In the List of Fields to Print window, select the fields you want to include, and click the right arrow to add them to your export:
    - If you want to include families, select **Fam** > **Fam - Detail** > **Unique ID**.

- If you want to include members, select **Mem** > **Mem - Detail** > **Unique ID**.

4. Select and add any additional fields you want to include in the export.
5. Click **Save/Ok**.
6. Click **Next**, and select the export options you want.

> **Useful Information**
>
> The Import processes require a CSV file format.

7. Click **Next**, and select who you want to include.
8. When you're ready, click **Build**.

To create an export report with Student Unique IDs

1. On the Report tab, click **Student Reports**, and click **Add**.
2. Click **Export** to create an export report.
3. In the List of Fields to Print window, select **Student** > **Student - Detail** > **Unique ID**, and click the right arrow to add it to your export.
4. If you want to include families, select and add **Fam** > **Fam - Detail** > **Unique ID**.
5. Select and add any additional fields you want to include in the export.
6. Click **Save/Ok**.
7. Click **Next**, and select the export options you want.

> **Useful Information**
>
> The Import processes require a CSV file format.

8. Click **Next**, and select who you want to include.
9. When you're ready, click **Build**.

After you create the report, you can use the Unique ID options during any of the import processes. When you run the import processes, make sure to use the location where this report is saved for the import file path on the File Information tab.

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11: Reports

You can access reports from different locations in the program. In the navigation pane of the major program areas, you'll see the link to **Reports**. The program displays the available reports for the area of the program you are currently in. To see all available reports, select **All Reports**.

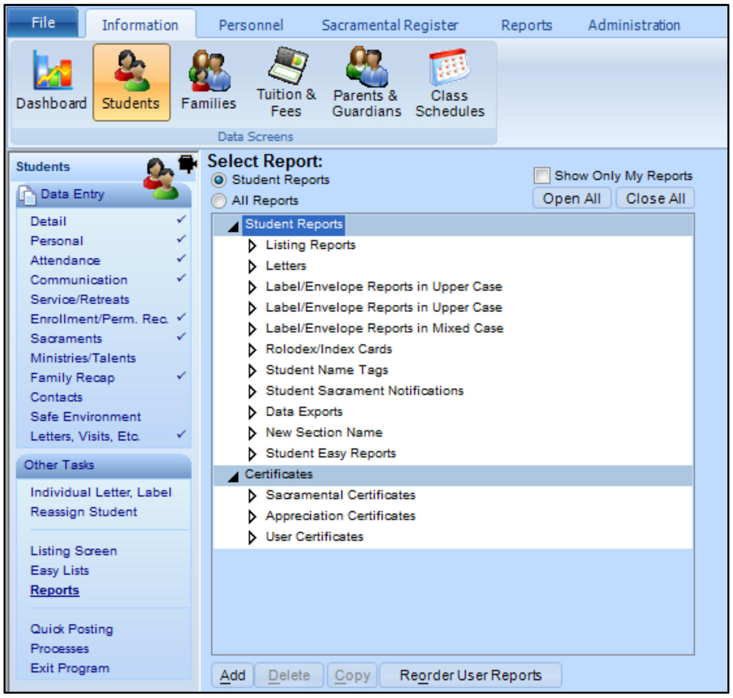

Fig. 11-1.

All reports can also be easily accessed from the **Reports** tab on the ribbon.

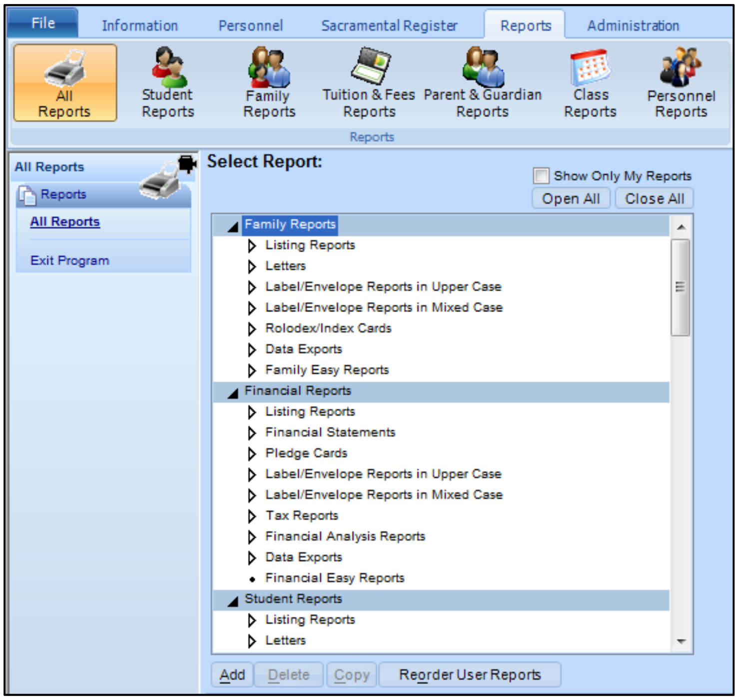

Fig. 11-2.

In the Select Report window, you begin the process of selecting and printing reports. Below is a brief outline of the report process.

1. **Select the report** — In the first window, there is a list of all available reports. To expand report sections, click the triangles. Or, to view a list of all available reports, click **Open All**. To select a report, click it and click **Next**.

2. **Review the report overview** — In the Overview window, the program recaps the report settings. If everything looks okay, you can proceed straight to **Preview Report** or **Print Report**. If you want to change report settings and/or use the selection options, click **Next** and proceed through the report wizard.

3. **Select the printer** — In the Select Printer window, select which printer to use, the paper style, and orientation.

4. **Select the report layout** — In the Layout window, select layout options, such as the type of print (normal print, compressed print, etc.), the margin settings, and the various parts of a letter, label, envelope, etc. These options depend on the type of report you're printing.

> **Useful Information**
> Some reports are called "Easy Reports." You create Easy Reports when you add new reports or make copies of existing ones. You can modify the content of these reports. When a report is modifiable, a button displays in this window.

5. **Select the program data you want to print and the order to print it** — In the Selection window, enter the criteria you want the program to use to determine which records print. This is called the "Selection Information".

6. **Preview and print the report**.

Following are some sample windows in the report wizard. To return to previous windows and make changes, click **Back**.

Selecting the Report

First, you must select **WHICH** report you want to print.

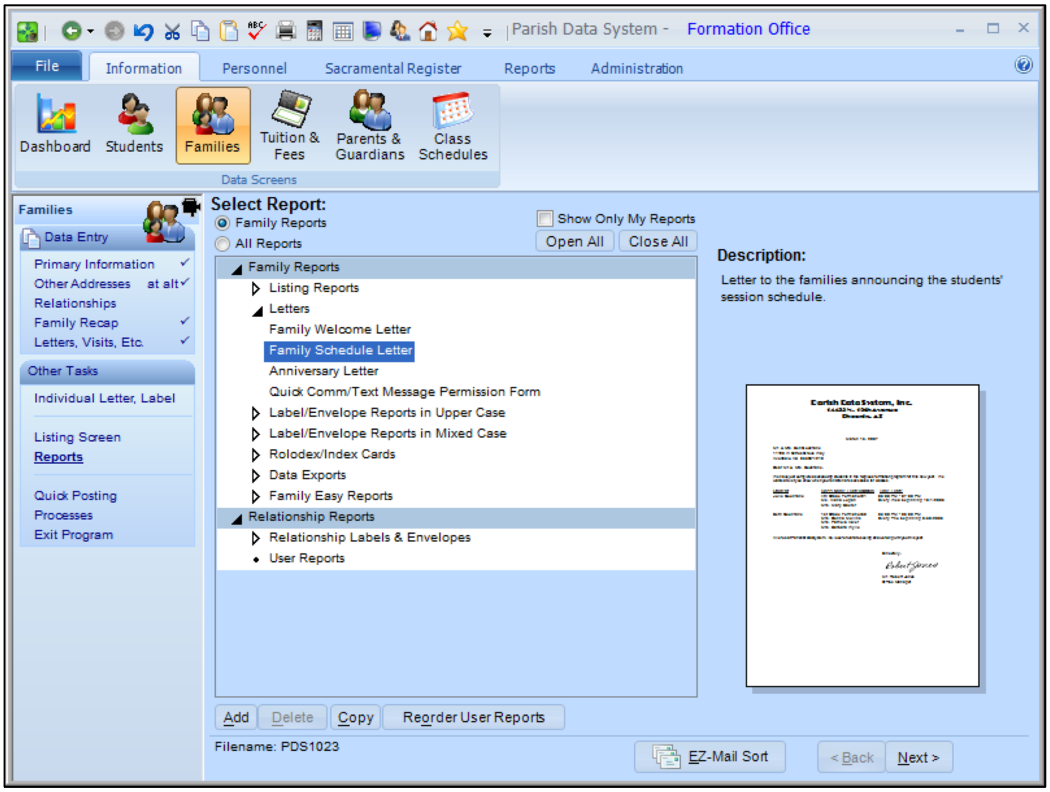

Fig. 11-3.

Useful Information

If you're an administrator, you can set report and report selection access for each user under **Administration > Users & Passwords**.

To expand a section of reports, click the corresponding triangle. To view all available reports, click **Open All**. To collapse all reports to just the basic categories, click **Close All**.

To add a user-defined report, click **Add**. To make a modifiable copy of a pre-defined report, select the report, then click **Copy**. To remove a report you copied or added, select the report, then click **Delete**.

When adding a new report or making a copy of an existing report, you have ownership of that report and can specify if only you and the administrator have access, if you want to share it but not allow anyone to modify it, or if everyone should have access to print and modify the report.

If other users have created reports and those reports were set so you can print and/or modify them, in the Select Report window, all reports that you have access to will display by default. However, if you want to filter the list of reports so that only reports you created are available, select **Show Only My Reports**.

To view a sample of the selected report, click the thumbnail picture. This image is typically a one-page example that uses sample data and default settings.

Copied or added reports have two additional buttons: **Adv. Script** and **Save as Custom Report**. To view the UDR, INI, and Pascal files associated with a user-defined report, click **Adv. Script**. To save your user-defined reports to a disk, click **Save as Custom Report**.

Once you have selected your report, click **Next** to continue.

Reviewing the Overview

In the Overview window, you can view the basic settings for the selected report.

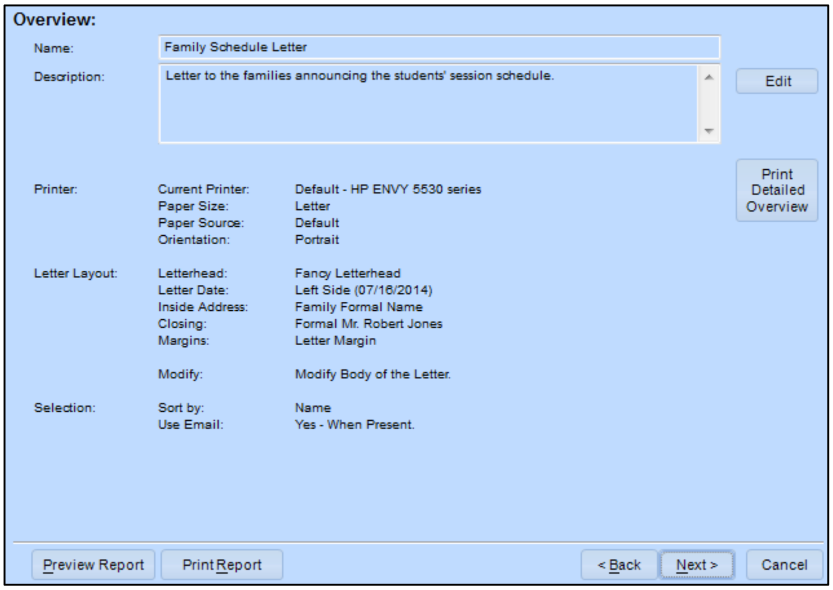

Fig. 11-4.

To jump directly to any of these settings, click the links in the middle of the window. Then to return, click **Back to Overview**. Most report settings are retained from the last time you ran the selected report. If everything looks okay in this window, you can proceed directly to **Preview Report** or **Print Report**.

To change the name or description of this report, click **Edit**. You can only rename reports you have added or copied, so you cannot edit a predefined report name. You can always edit the report description.

To print all of the settings in this window, click **Print Detailed Overview**. This makes a handy cover page for some reports.

To review and change all report settings in typical wizard fashion, click the **Back** and **Next** buttons.

Selecting the Printer

Next, you must indicate **WHERE** the report will print. In the Select Printer window, you can select the printer to use, the paper size, and the paper source. You can also switch the page orientation from portrait to landscape mode, which is helpful if you have a report with many columns.

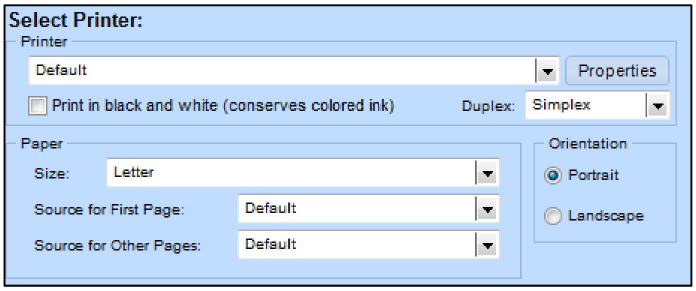

Fig. 11-5.

To change the printer-driver controlled properties of the selected printer, click **Properties**. The options available in the **Size** and **Source** drop-down lists depend on the selected printer. For example, an Inkjet printer may only have one or two tray sources, whereas a Xerox copier may have multiple tray sources, such as tray 1, tray 2, tray 3, High Capacity tray, Bypass tray, etc.

Once you have made your selections, click **Next** to continue.

Selecting the Report Layout

The third step is to indicate **HOW** the report will print.

The Layout window controls the report layout. Each type of report has different layout features. For example, a listing report has options for the page settings, margin settings, and fields to print. A letter report has options for letterhead, margins, inside address and closing settings, and the text of the letter itself.

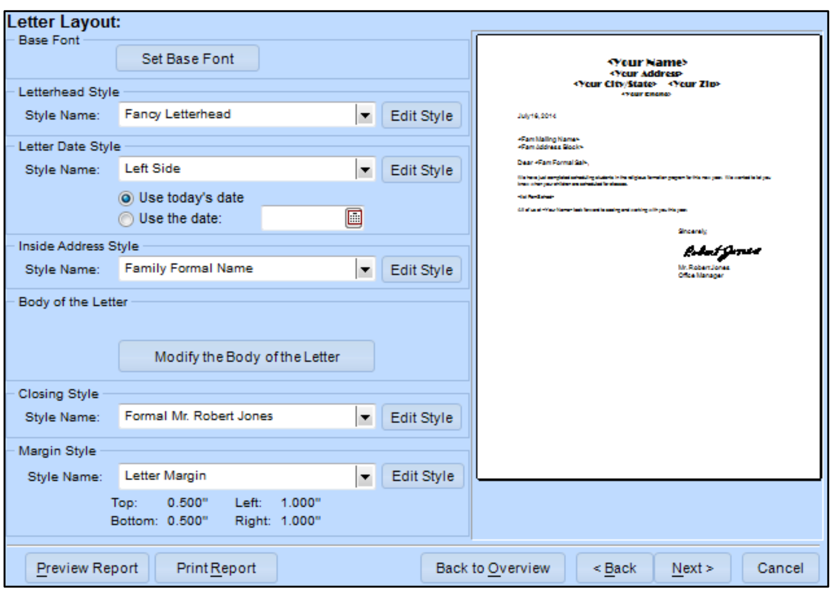

Fig. 11-6.

Once you have made your style selections, click **Next**. Remember, you can preview before you print the report. If you want to change the style, you can click **Back** to return to this window.

About Styles

Report settings are controlled by styles. A style is a named collection of related formatting elements. To add new styles or modify existing styles, in the report layout window, click **Edit Style**. For example, the left, right, top, and bottom margin settings are part of a margin style. A margin style called "Letter" might have a ½-inch top and bottom margin, and a 1-inch left and right margin. To utilize the largest possible print area, select the special margin style called **Smallest Margins**. You can have an unlimited number of styles for each report type.

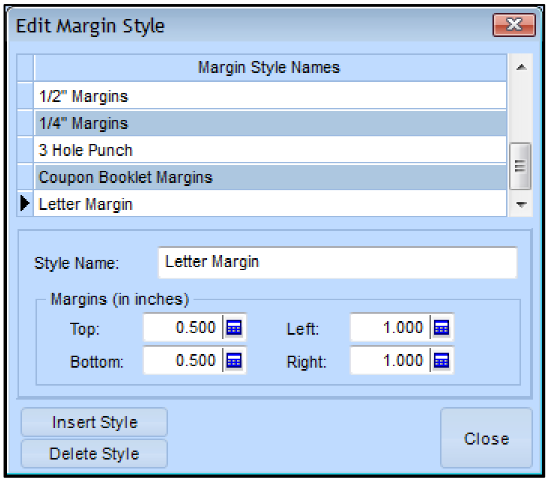

Fig. 11-7.

Text of a Letter

If you are printing a letter report, you can modify the text of the letter. In the report layout window, click **Modify the Body of the Letter**.

You can modify the text of a predefined letter; however, it is not recommended. Instead, create a copy and modify it to ensure that future upgrades do not overwrite your changes. If you do make changes to a predefined letter and you want the original letter back, click **Reload Default Text**.

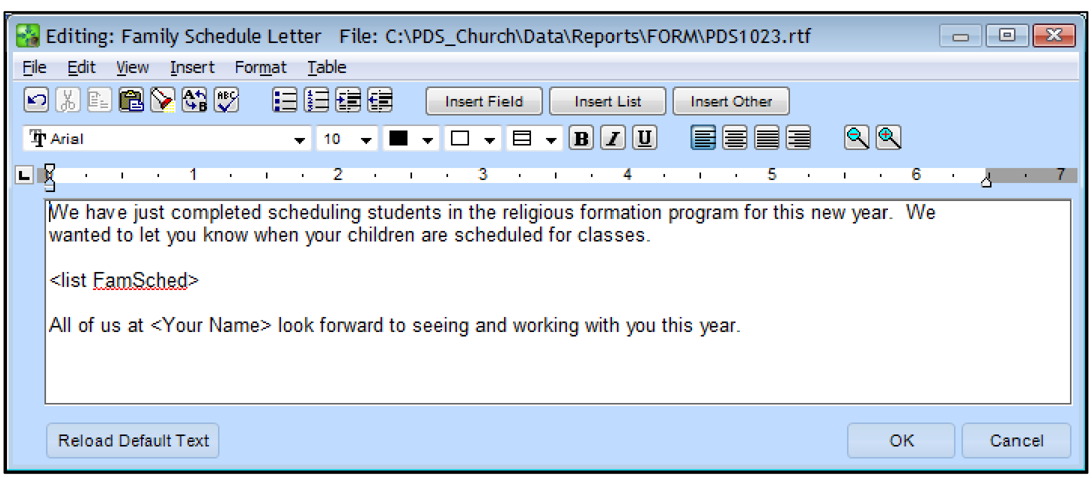

Fig. 11-8.

The letter editor is similar to other word processors. You can change fonts, insert tabs, images, and bulleted lists; center, left or right justify text; and perform spell-check.

Inserting Fields

You can insert fields, lists, and other elements into your letters, labels, envelope, and form reports. When you insert field names or list names into a report, they are framed or bracketed by < and >. For example, *<Fam Name>* prints the name of the family, *<Fam Address Block>* prints the family's complete address, and *<Fam Phone List>* prints a list of the family's phone numbers.

To insert data fields into your reports, in the text editor, position your cursor where you want to insert a field, and click **Insert Field**.

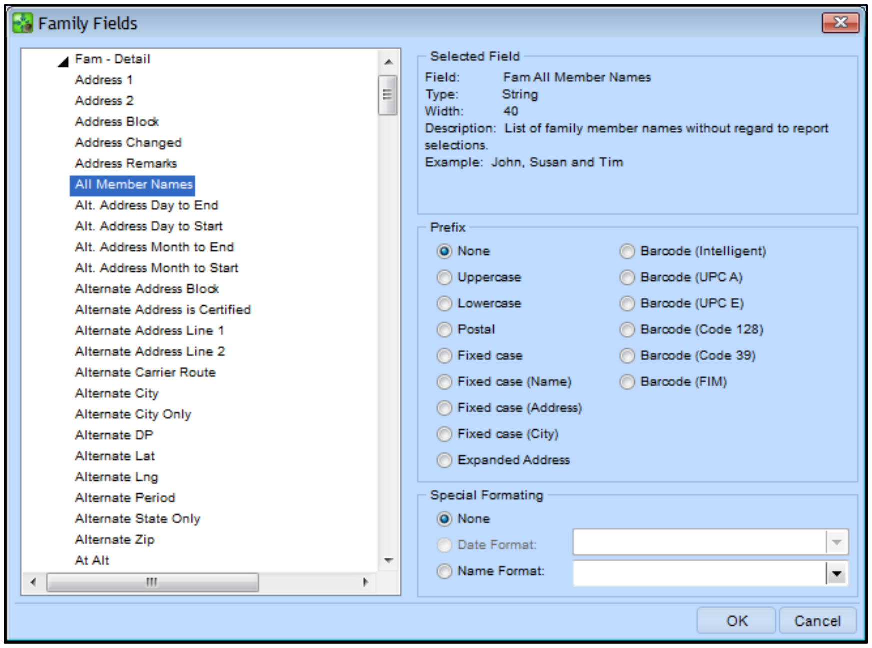

Fig. 11-9.

On the left side of the Fields dialog box are categories of available fields. Click the triangle to display the list of fields within that category. If you are unsure which fields to insert, you can right-click a field to display pop-up help with a brief description of that field. Or you can select the field to display the description information and some additional options for how to print the inserted field (e.g. you may want the field to print in all upper case).

Some special fields are available only in letters and print your organization’s information as it is entered in the License Information dialog box. To add or update the appropriate values for your parish, on the File menu, click **Setup** > **License Information**.

By inserting these fields, you don't have to type your contact information in your reports. Also, if your contact information changes, you can edit the information in the License Information dialog box instead of changing the information on all of your letters.

Indenting Fields

Be careful when indenting fields that may contain multiple lines of text. The following are ways to indent text so that it displays further right than the normal left hand margin:

- Extra spaces
- Tabs
- Paragraph indents

Let's demonstrate why using spaces and tabs do not work well for some situations. Look at the example labels below. In editor, we have turned on the formatting so we can see the spaces, tabs, and paragraph marks (which are usually invisible). To do this, click **View > Show Formatting Marks**.

Example 1 - No indenting

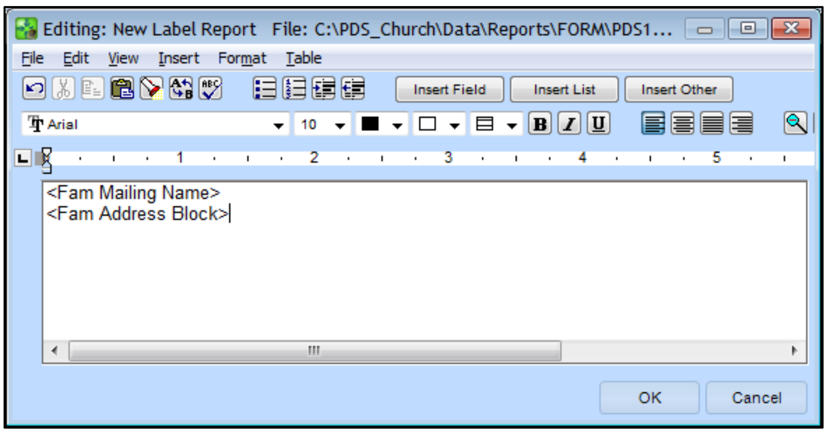

Fig. 11-10.

Notice how the text is right up to the edge of the label. There is not much room for error here if the printer skews the page.

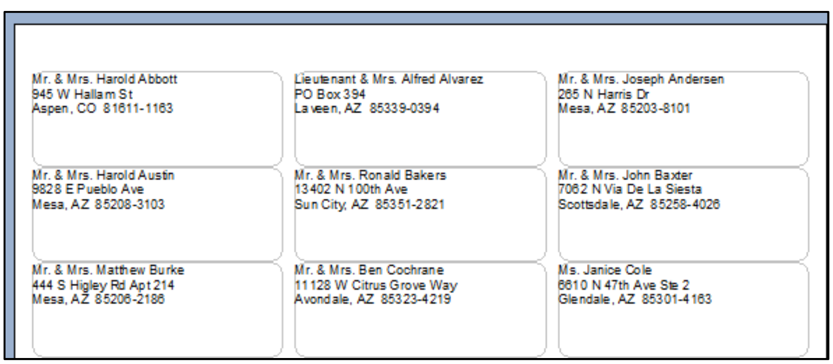

Fig. 11-11.

Example 2 - Indenting with extra spaces

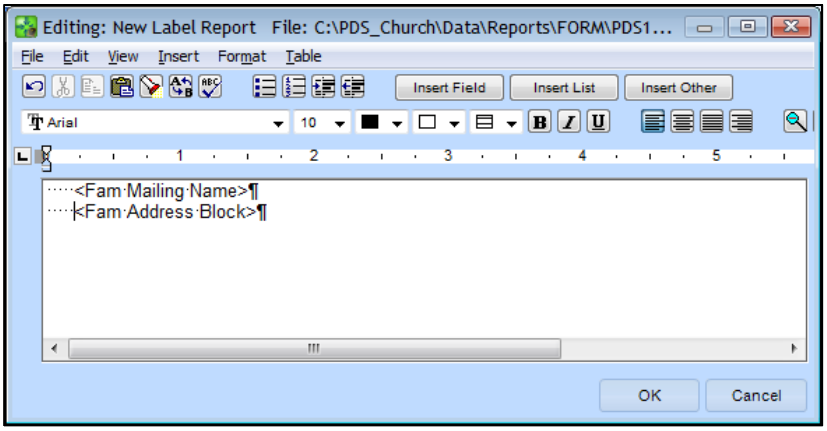

Fig. 11-12.

The mailing name and the first line of the address seem to indent okay, but the Address Block is a multi-line field that may contain two or three lines of text. Using the editor, you can only enter extra spaces on the first line. When the program adds the additional lines of the address, they will not be indented, which does not look nice when printed.

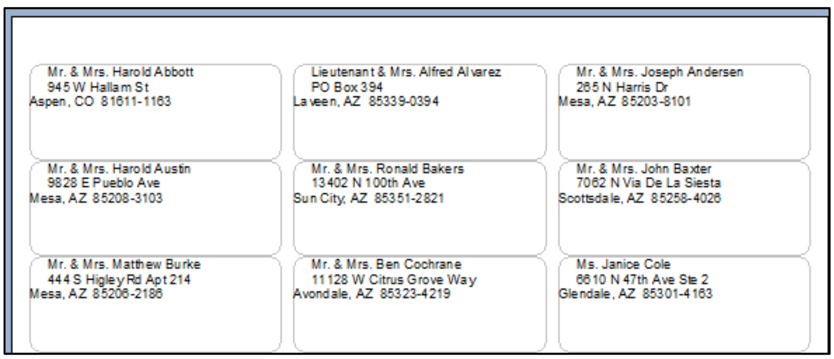

Fig. 11-13.

Example 3 - Indenting with tabs

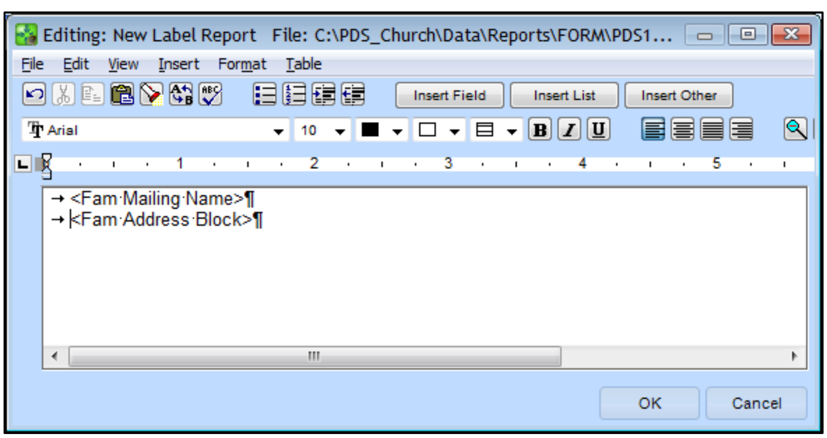

Fig. 11-14.

This presents the same issue as adding extra spaces.

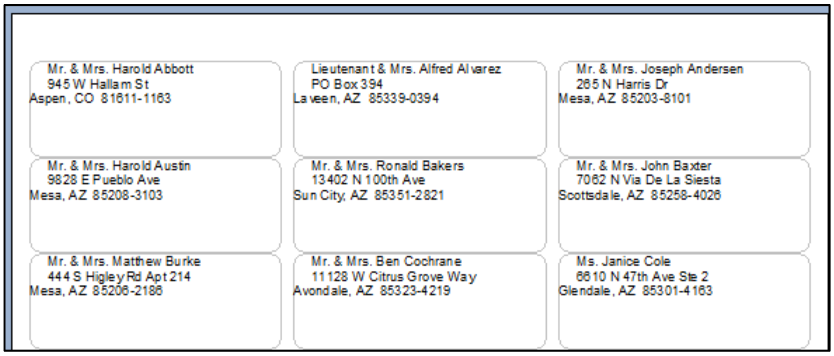

Fig. 11-15.

Example 4 - Using paragraph indents

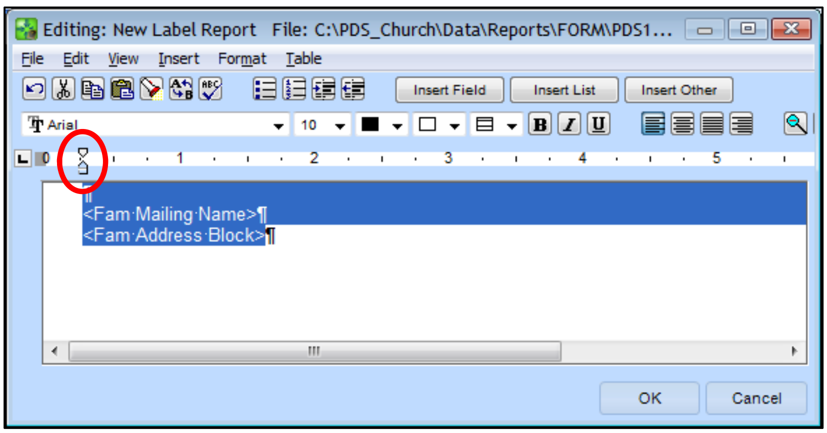

Fig. 11-16.

In this example, we added a blank line at the top to move the text down from the margin. Then, we inserted paragraph indents by selecting all fields and dragging the paragraph indent control away from the left margin (it is easiest to drag the bottom of the rectangle). Now, we have perfect indents.

Fig. 11-17.

Manually indenting (using spaces or tabs) affects all multi-line fields, not just the Address Block. The same issue applies to the Remarks field. Any field where you can enter multiple lines of text is affected when you manually indent. When you want to indent fields, make sure you use paragraph indents (example 4 above) instead of extra spaces or tabs.

Multiple Languages

You can set up the text of so that information prints in different languages. All it takes is the use of the proper inserted characters and typing the text in the language you want to use.

The program does not translate letters into different languages, but you can enter different versions of the letter in the same report so that the correct letter will print for each family. In other words, when you send letters to multiple families, you can have the program print a letter in English, Spanish, or other languages for the appropriate families by running just one report.

Keep the following requirements in mind when you use this feature:

- If you are sending letters to families, you must select the **Language** of each family on the head of household member's Personal window.
- If you are sending letters to individuals, you must select the **Language** you intend to use in the letter in the individual's Personal window.
- If you use the concept of main language/secondary language (e.g. English/Spanish, Spanish/English), make sure the language you want to use in the letters is listed first.
- You must spell the name of the language exactly the same in each combination. For example, "English/Spanish" and "English/German", NOT "Eng./Span." and "English/Ger".

To set up multiple language letters, type the letter in both languages, and enter **<Language: *name*>** at the beginning of that part of the letter. You can also use **Insert Other** and select **Language/End - Spanish Sample** to quickly enter the full language command.

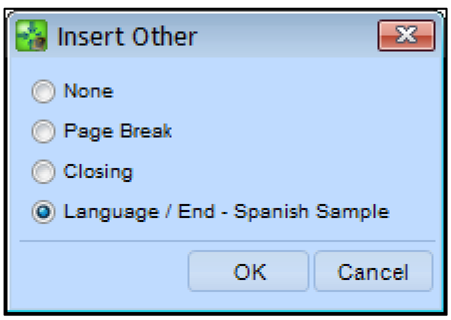

Fig. 11-18.

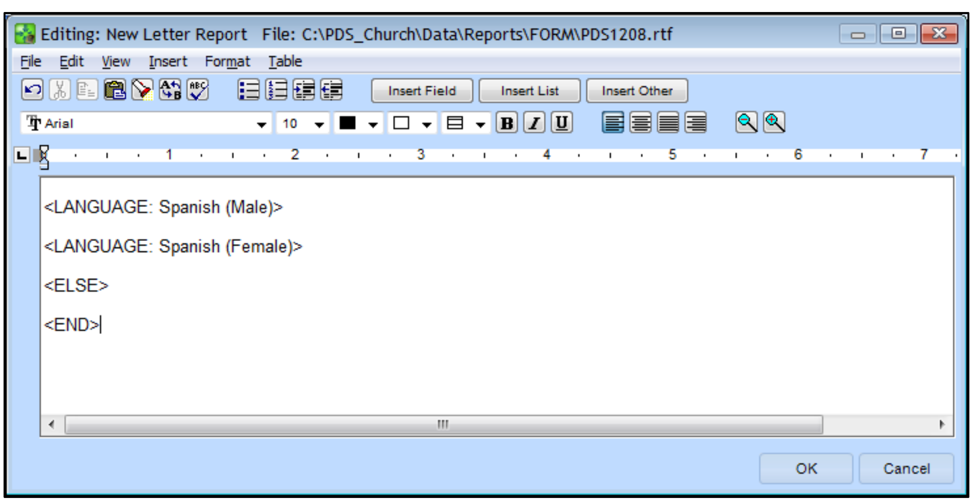

Fig. 11-19.

The first introduction tells the program to print what follows if the **Language** field equals **Spanish**:

```
<Language: Spanish> Esta es una cara de muestra escrita en Espanol.
```

If the Language field equals English, print the following:

```
<Language: English> This is a sample letter written in English. <End>
```

<End> tells the program to continue to the next family.

You can use multiple languages in Closing and Inside Address/Salutation styles. For example:

In Closing Style:

```
<Language: Spanish> Sinceramente, Sr. Robert Jones Administrador de Oficinas

<Language: English> Sincerely, Mr. Robert Jones Office Administrator

<End>
```

In Inside Address Style:

```
<Fam Mailing Name> <Fam Address Block>

<Language: Spanish> Estimados <Fam Formal Sal>,

<Language: Hawaiian> Aloha <Fam Formal Sal>,

<Language: German> Gutentag <Fam Formal Sal>,

<Language: English> Dear <Fam Formal Sal>,

<End>
```

You can also use **<Language: Other>** to print a section for any languages other than those with a specific **<Language: *name*>** command. For example:

```
<Language: Spanish> Gracias!

<Language: Other> Thank You!

<End>
```

If the language has different phrases or words depending on gender, as in Spanish, you can specify the gender in parentheses. In Spanish, "Estimado" means "Dear".

```
<Language: Spanish (Male)> Estimado <Mem Mailing Name>,

<Language: Spanish (Female)> Estimada <Mem Mailing Name>,
```

Selecting the Funds to Print

In financial reports, you must select **WHICH** funds to print and **WHICH** date range to print for the funds. You can select anything from a single day to the full date range of the fund. You can run most financial reports for more than one fund at a time.

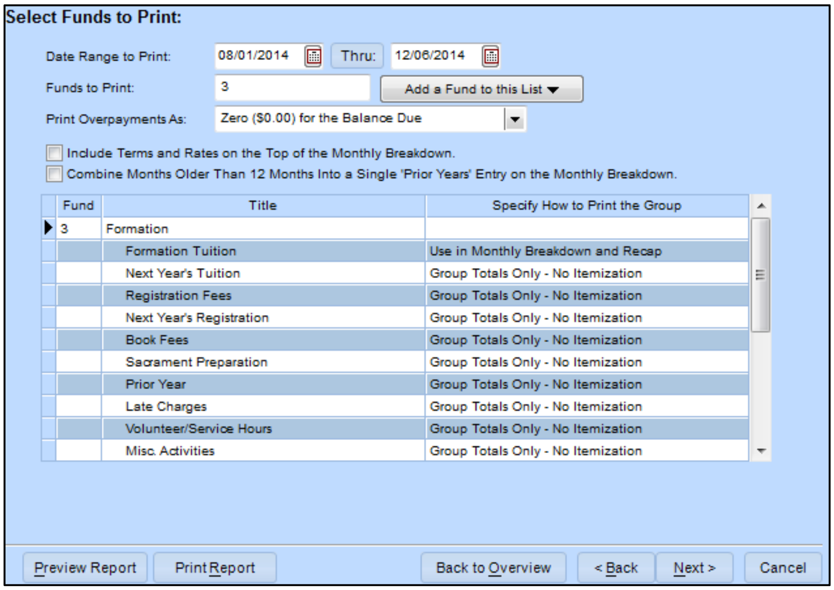

Fig. 11-20.

You can select to print pledge or tuition overpayments as **Zero** or as the **Actual Amount Overpaid**. For example, if tuition is $1,000 for the year, and the family paid $1,200, you can select for the report to show the balance as $0, or as negative $200 which is the actual amount.

You can select how each group of activities in each fund prints:

- **Use in Monthly Breakdown and Recap** — Prints how much was given or due each month.
- **Group Totals Only - No Itemization** — Prints the total for the group without breaking down the details of the activities.
- **Itemize Each Activity in the Group** — Prints the totals for each activity in the group.
- **Don't Include Group in the Report** — Select this option if you do not want to print the group or include its activities in the totals.
- **Include Group in Report** — Select this option to include the totals from this group in the fund total.

Selecting the Information to Print

The next step is to indicate **WHICH** data you want to print.

When you print reports, you must sift through all of the program data and find records that meet certain conditions. For example, if you want to send a letter to specific individuals, you must define a "selection" for those individuals.

In this window, you select which records you want to print. You can select them based on conditions or criteria, or you can select individual records from a list.

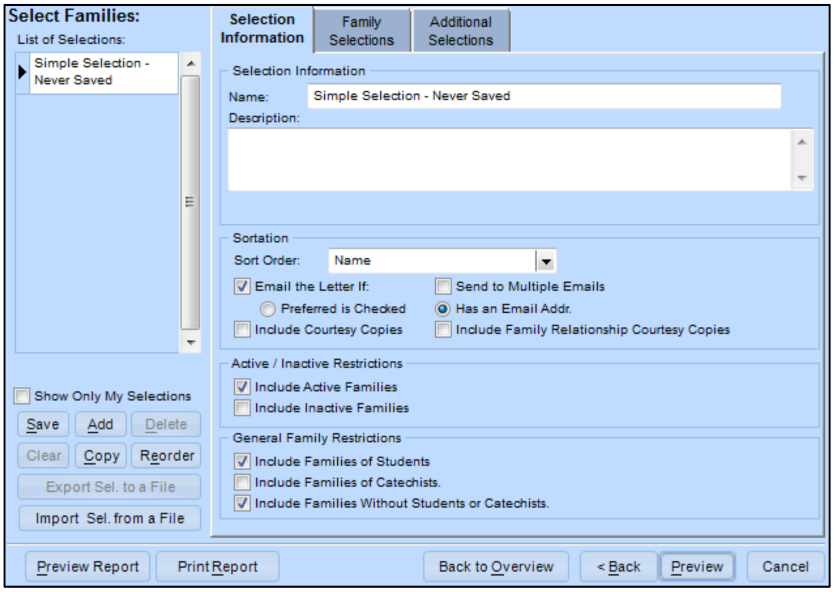

Fig. 11-21.

Use the tabs to select either by checklist or criteria conditions. If you create a set of selection criteria that you will use over and over again, you can save the selection under **List of Selections**.

To create a new report selection

1. In the List of Selections pane, click **Add**.
2. Give the new selection a **Name** and **Description**.
3. In the **Sort Order** drop-down list, select how you want to sort the report information.

> **Useful Information**
> The right side of the window controls how the report is sorted and what information is printed. Different reports have different options.

4. Specify, on the various tabs, any other criteria to be used. Different reports have different tabs.
5. Click **Save**.

When adding a report selection, you have ownership of that selection, and you can set selection access as one of the following:

- **Public** – Other users can view and modify your report/selection.
- **Shared** – Other users can view but not modify your report/selection.
- **Private** – Only the owner can view and modify the report/selection.

To designate access to your report selections

1. Select the report you want.
2. In the Selection window, add your own report selection or copy existing selection.
3. On the **Selection Information** tab, select an owner and the selection access option you want.

To use a one-time selection without saving it, in the **List of Selections**, use **Simple Selection - Never Saved**. This item always appears first in the list. If you entered some selections and then decide you want to save them, click **Save**, and enter a name and description.

Family or Individual Selections

The Family Selections tab is used to select families to include in a report. It is available with family and financial reports, but not student, parent, class schedule, or personnel reports. Other types of reports will have selection tabs that can be used to select the students, parents/guardians, class schedules, or personnel in specific ways.

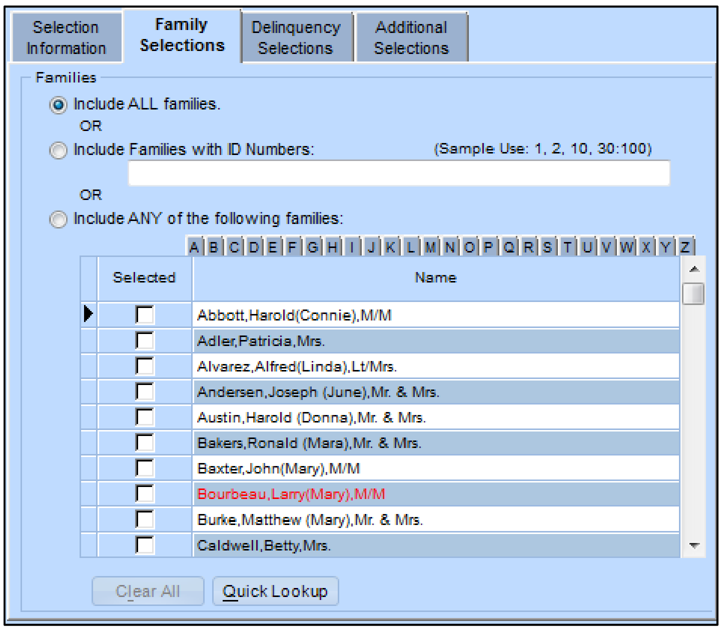

Fig. 11-22.

- **Include All Families** — Run the report for all families in the data.
- **Include Families with ID/Envelope Numbers** — Run the report for specific IDs or a range of IDs. Use a colon (:) to indicate a range. Separate ranges with commas. For example, "1, 5:10, 100:999, 1500".
- **Include ANY of the following families** — Include specific families. Select the families in the list. To quickly clear your selections, click **Clear All**.
- At the top of the tab, click a letter to jump to that place in the list.
- **Quick Lookup** — Click to quickly locate a specific record in the list.

Additional Selections

Use the Additional Selections tab to create a specific set of criteria for a report. The fields and values available depend on the type of report you run. You can use the selections on this tab to filter your list of report criteria to a very specific level, for example:

- All families living in a specific city, as shown in Fig. 11-23.
- Any members with a specific keyword, such as grade, talent, or ministry.
- All families who have given over $1000.
- All students in a certain class/session.

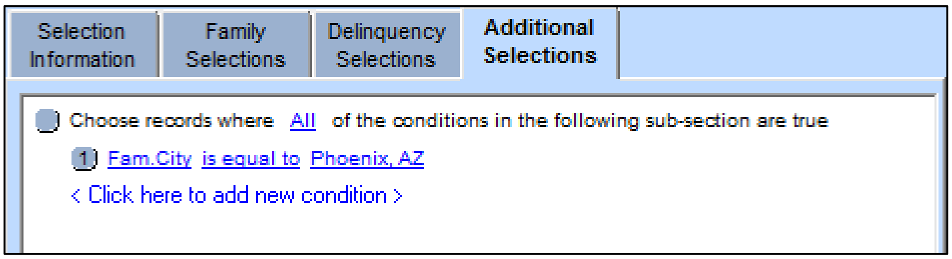

Fig. 11-23.

When you click the small oval icon, two options display:

- **Add Condition** — Add a new field, relation, or value condition line.
- **Add Sub-section** — Add a new set of criteria to be considered as a group. Condition statements within the subsection will be evaluated, in order, before condition statements outside of the subsection.

As conditions are added, a numbered button displays beside the statement. When you click this button, the following options display:

- **Delete Current Row** — Remove the highlighted condition line.
- **Enable/Disable Row** — Condition lines can be turned on and off without being deleted, which allows you to test conditions and combinations more quickly. Disabled rows are not considered when the report prints. Disabled rows are gray.

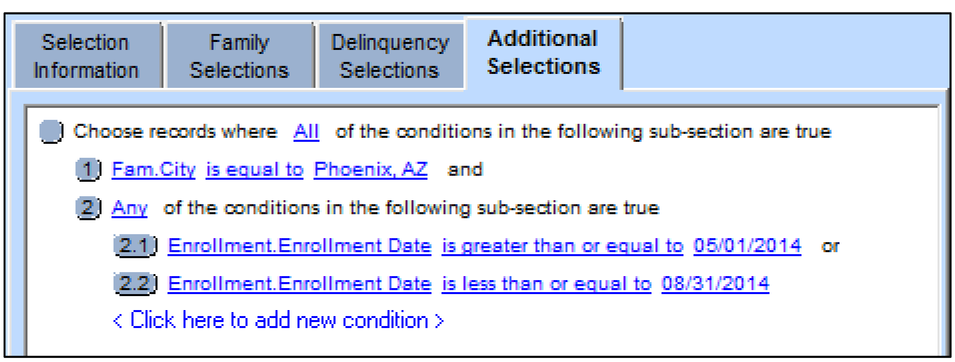

Fig. 11-24.

Each condition line relates to others of the same level in one of three ways:

- **All** — Only items that are true for each condition in that section or subsection print on the report. This is the same as a logical AND.
- **Any** — Items that are true for any of the conditions in that section or subsection are printed. This is the same as a logical OR.
- **None**— If none of the conditions are true in that section or subsection, then the family/individual is printed. This is the same as a logical NOR.

In the figure above (Fig. 11-24), lines 1 and 2 fall under the **All** condition of the top line. Lines 2.1 and 2.2 fall under the **Any** condition of the sub-section.

Condition Lines

Each numbered line is a separate condition that is decided when the report prints. The lines have the general format of Field – Relationship – Value.

<Click here to add new condition> — Click to add a new condition line with the same level as the one above it.

Field — Click the field hyperlink to view a list of fields pertaining to the type of report you selected. Click the triangle next to a group to see the fields within it. The fields you select determine the list of values you can select from.

When creating a member report, if you click the first field, then expand the Mem list and select **Is a Parent**, your values would be limited to **Yes** or **No**. If, on the other hand you select **Ethnicity**, the list of possible values is much greater. The condition statement **Mem.Is Parent** **is equal to** **Yes** produces a list of all members who are parents. When building conditions, right-click on the field name to view a pop-up containing more detail about the field.

Relationship — This is a logical (mathematical) operator, such as =, <, or >.

- **Is equal to** — Field = Value. Example: Fam City is equal to Phoenix, AZ.
- **Is not equal to** — Field ≠ Value. Example: Fam City is not equal to Phoenix, AZ. This relationship is useful when you want everything other than a specific value.
- **Is less than** — Field < Value. Example: Fam ID Number is less than 3000.
- **Is less than or equal to** — Field ≤ Value. Example: Fam ID Number is less than or equal to 3000.
- **Greater than** — Field > Value. Example: Fam ID Number is greater than 3000.
- **Greater than or equal to** — Field ≥ Value. Example: Fam ID Number is greater than or equal to 3000.
- **Is in list** — The field is within a list of values. Each value must be in quotation marks and separated by commas. Example: Fam City is in list "Phoenix, AZ", "Glendale, AZ".
- **Is not in this list** — The field is not within a list of values. Each value must be in quotation marks and separated by commas. Example: Fam City is not in this list "Florence, SC".
- **Starts with** — The field has the same beginning character or characters as the value in question. Example: Fam Name starts with A.
- **Does not start with** — The field has a different beginning character or characters than the value in question. Example: Fam Zip does not start with 85.
- **Contains** — The field includes the value. Example: Fam E-Mail contains "hotmail". This returns a list of all family email addresses that include the word "hotmail."

- **Is not between** — The field falls outside of two values. Example: Fam ID Number is not between 300 and 800.
- **Is between** — The field falls between two values. Example: Fam ID Number is between 300 and 800.
- **Is ever equal to** — The value in the field is equal to at least one of the fields entered. You could, for example, enter three conditions: Ministry is ever equal to Choir, Ministry is ever equal to Hospitality, and Ministry is ever equal to Baby Sitting. When you run the report, if Ministry is ever equal to Choir, Hospitality, or Baby Sitting, the member’s name is included in the report.
- **Is never equal to** — The value in the field is not equal to one at least one of multiple fields entered. You could, for example, enter two conditions: Sac. Confirmation is never equal to Yes, and Sac. Confirmation is never equal to Approximate. When you run the report, if Sac. Confirmation is never equal to Yes or Approximate, the member’s name is included in the report.

Value — This is a variable, or the value you use to test the field. Do not use dollar signs, commas, asterisks, or question marks. Examples could include: "Phoenix" or "Glendale".

- If the relationship is "Is in list" or "Is not in list", enter the value in quotes and separate items with a comma.
- If the field is a keyword or table field, such as "City", or a program-controlled list, such as "Month of Birth", click the **Value** hyperlink to select a variable.

To add report criteria

1. In the Selection Information window, click the **Additional Selections** tab.
2. To select a conditional relation, click the **All** hyperlink in the **Choose records where All of the conditions in the following subsection are true** statement. Insert conditions and subsections, if any.
3. To add a new condition, click **<Click here to add new condition>**, or click  beside **Choose records where All of the conditions in the following subsection are true**. Then, select **Add Condition** or **Add Subsection**.
4. To delete a condition or subsection, click the numbered oval beside the condition statement, and then click **Delete Current Row**.
5. When you're finished entering conditions, click **Preview**.
6. If you plan to use this report criteria in the future, click **Save** to keep your selections.

Clear Additional Selections — Click to remove all condition lines.

Exclude rather than include selected records — Select this option to change the main condition phrase at the top of this window from **Choose records...** to **Exclude records...**. The program will then exclude all items that match the conditions given and print the rest.

Use Optimizer — In most cases, to improve the speed that PDS searches for records matching the conditions you set, select **Use Optimizer**.

Selection Examples

Here are some examples of additional selection that you can use to print particular types of reports.

Example 1

Select families who registered between May 1 and August 31. There are two ways you can do this:

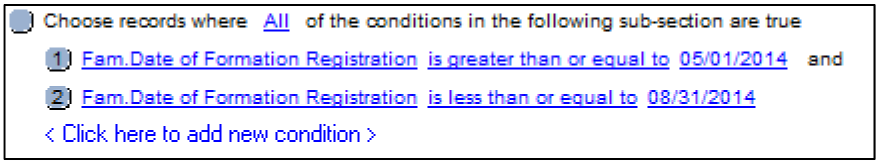

Fig. 11-25.

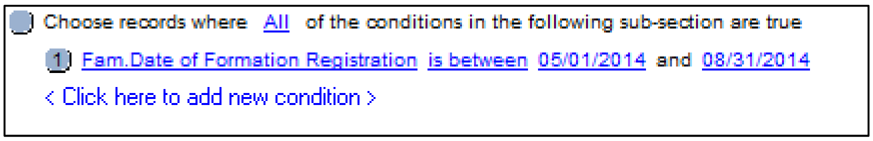

Fig. 11-26.

Example 2

Select families with a **Family Keyword Description** of **Jr. High/High School Fund Raiser** or **Picnic Planning Family**. There are two ways you can do this:

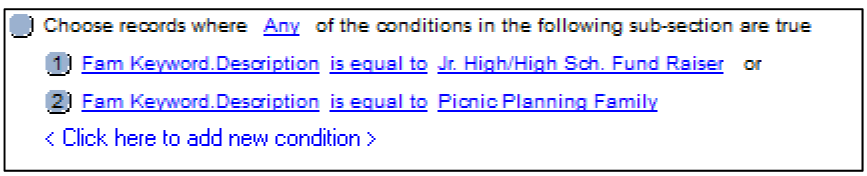

Fig. 11-27.

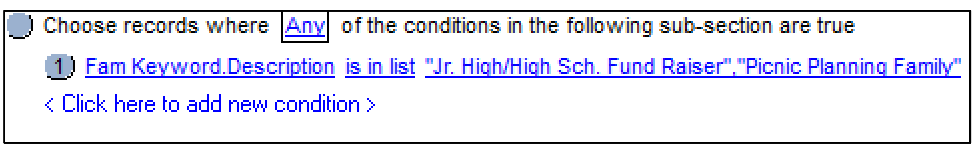

Fig. 11-28.

Example 3

Print families whose ZIP code starts with "85."

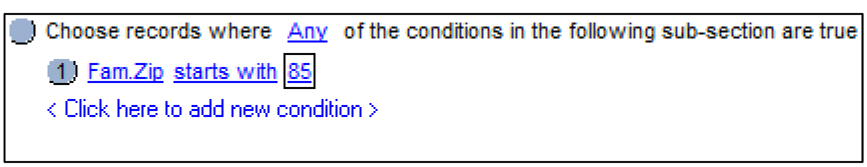

Fig. 11-29.

Comparing Selection Abilities

When is it better to use the family or individual selection tabs versus the Additional Selections tab?

Use the family or individual selections tabs to specifically select a family or individual. When you use these tabs, reports run much faster because the program does not have to search the entire database to find the information you want to print. When possible, use these tabs.

Use the Additional Selections tab to select families or individuals based on something other than their name or ID. Additional selections are more powerful and flexible; however, reports run slower because the program must search every record to find those that match the conditions.

Previewing the Report

Once you have selected the information to include in the report and the order you want it to print, click **Preview**. The Preview window displays how the report will look.

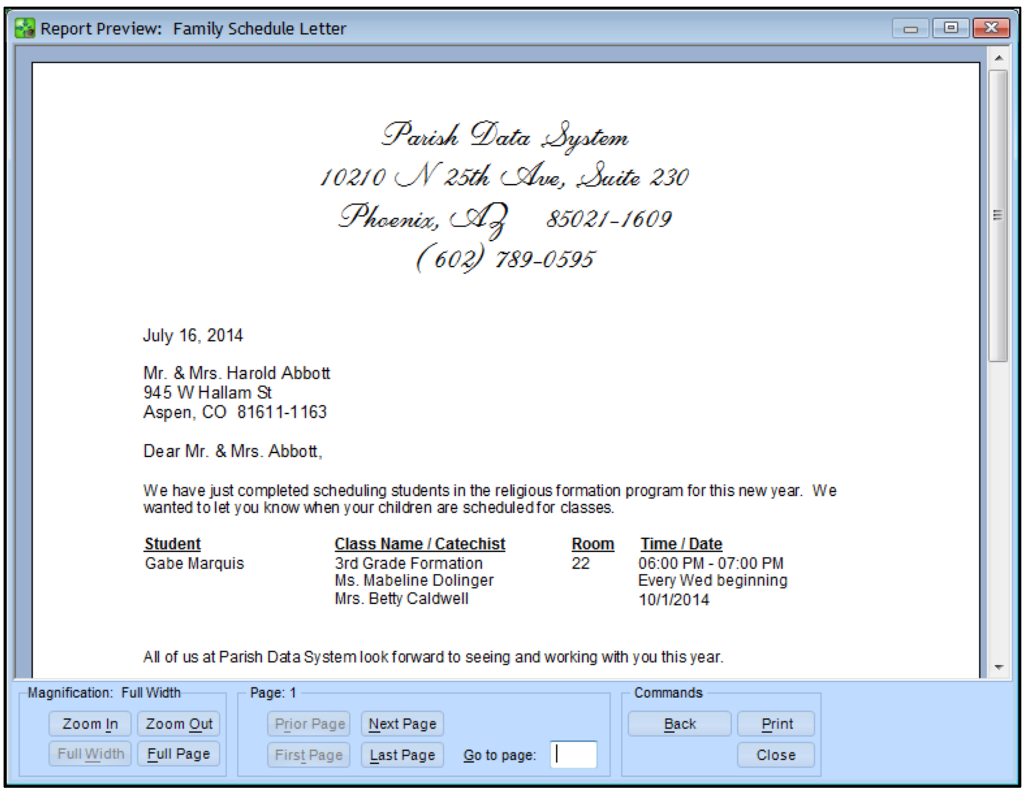

Fig. 11-30.

In this window, "what you see is what you get." Examine the report for the following:

- **Margins** — Are they set the way you intended? Sometimes, if you select **Smallest Margins**, the report prints very close to the edge of the page. You probably would not want this for a letter.
- **Styles** — Make sure other styles, such as fonts, letterheads, closings, page numbers, and dates, are the way you intended.
- **Selections** — If you used selections, make sure the report includes the information you intended.

To return to windows to make changes, click **Back**. To view the report better, click **Zoom In**, **Zoom Out**, **Full Width**, or **Full Page**. If your report is multiple pages, click **Prior Page**, **Next Page**, **First Page**, or **Last Page**. To go to a specific page of the report, in the **Go to page** field, enter the page number.

When you are ready to print the report, click **Print**.

Printing the Report

When you're ready to print your report, you can click **Print Report** in any step within the report wizard.

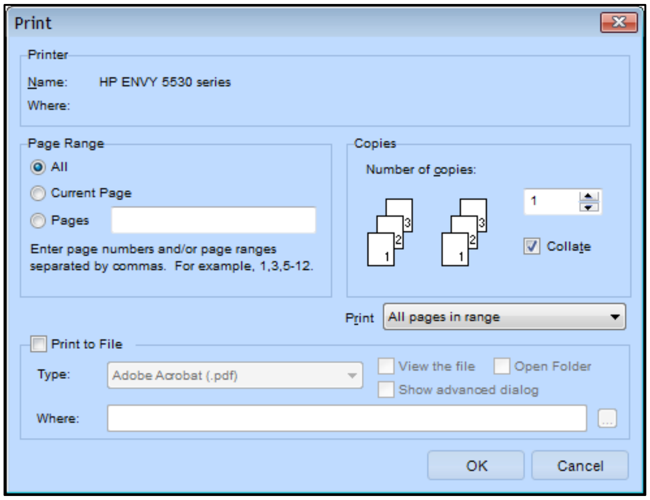

Fig. 11-31.

In this window, select to print all or only selected pages, and enter the number of copies. Once you have made your selections, click **OK** to send the document to the selected printer.

Print to File

You can send any report to a file so you have an electronic copy that you can save, forward, archive, etc. In the Print dialog box, select **Print to File**.

In the **Type** drop-down list, select the file type, and in the **Where** field, enter the location where you want to create the file. To select the location, click . To open the file once it is created, select **View the file**. To open the folder of where the file is located once the file has been created, select **Open Folder**. To see more file options, select **Show advanced dialog**. Once you have made your selections, click **OK** to send the document to the selected file.

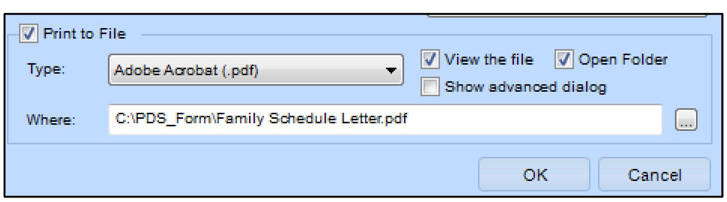

Fig. 11-32.

Sending Letters by Email

You can send letters or statements by email instead of regular mail.

Email addresses can be entered in multiple windows throughout the program. You can enter email addresses for your reference without sending letters and statements to them. However, to mark an email address so that email is sent instead of regular mail, enter the information in at least one of the following areas:

- **Family Primary Information** — Enter the family's email address(es) in the **Emails** section in the Primary Information section of the Families window. Select **Pref.** if they prefer to receive email over regular mail.

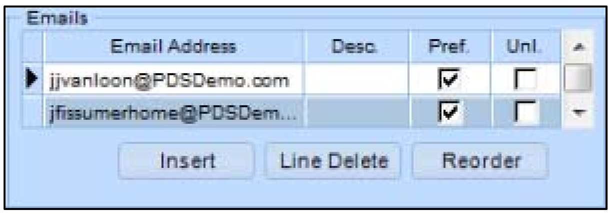

Fig. 11-33.

- **Members Information** — Enter Individuals email address(es) in the **Emails** section on the Communication section of the Students, Parents & Guardians, and Personnel windows. Select **Pref.** if they prefer to receive email over regular mail.
- **Billing Address** — You can send financial statements to people other than the family by adding contacts in the Billing Address section of the Tuition & Fees window. Enter the individuals email address in the **Email** section, select **Send Email Over Mail**, and indicate when to send statements to which address.

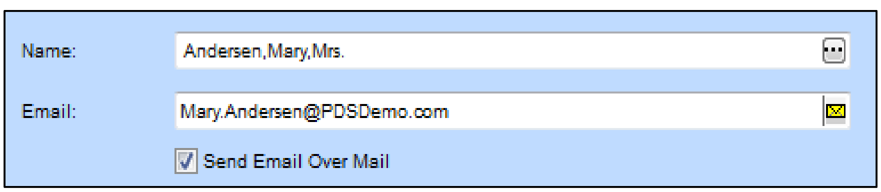

Fig. 11-34.

To send correspondence by email

1. For each family, enter the email address in one of the locations listed above, and select **Pref.** or **Send Email Over Mail**.
2. Select a report to print.
3. When selecting the families or individuals to include, on the Selection Information tab, select **Email the Letter if**, and select either **Preferred is Checked** or **Has an Email Addr**. To send the letter/statement to all email addresses associated with the individual or family, select **Send to Multiple Emails**.

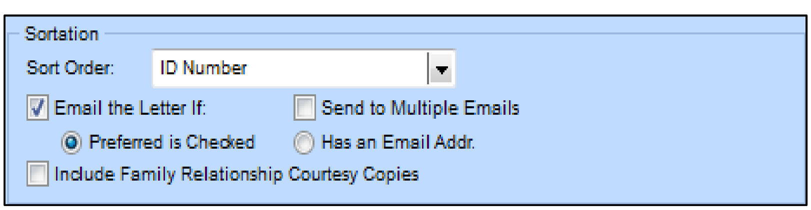

Fig. 11-35.

Useful Information
If you select **Has an Email Addr**, the program sends the email even if **Pref.** is not selected in the Families window.

If you're running a student or parent/guardian report, you can also select to send the letter to the family's email or only to the family's email.

4. Click **Preview**. The program builds a list of those who should receive regular mail and those who should receive email.
5. When the build is complete, click **OK** to display the first letter or statement to be printed. Review the first few records for accuracy before you continue.

Useful Information
This is only a preview, and the actual output may differ. Email previews don't display.

6. Click **Next**, or close the preview window. The Sending the Email dialog box displays.
7. Complete the information on the Email Message tab and the Email Server Setup tab. For more information on these tabs, see Sending the Emails section of this chapter.
8. To begin transmitting your email messages, click **Start Email**. If there's an error connecting or trouble with any single transmission, you can print the record and create a letter or statement for regular mail.

Useful Information
When printing mailing labels or envelopes to match a letter or statement, exclude those letters or statements that were sent by email. To do this, on the Selection Information tab for the label report, select **Skip the Label/Envelope if Email**.

Email Message

The Email Message tab contains message information.

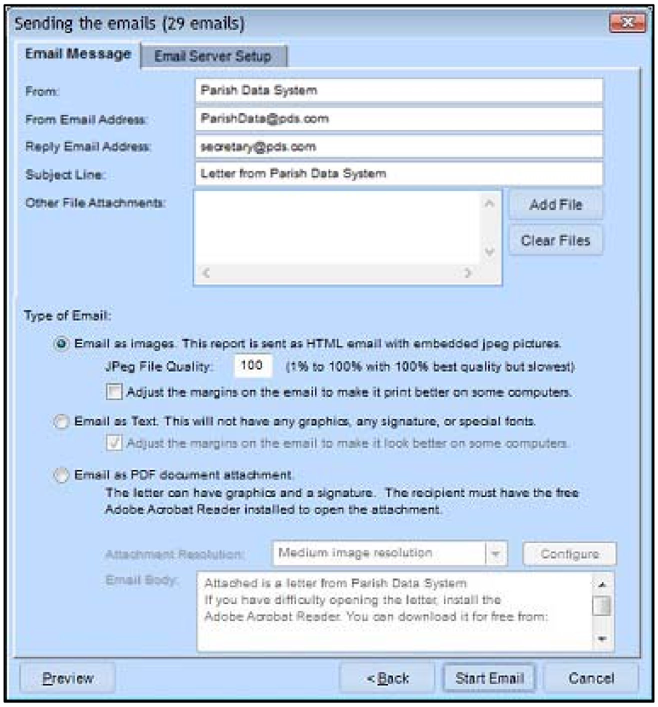

Fig. 11-36.

From — Defaults to the name of your organization in the License window. You can edit this field.

From Email Address — Defaults to your email address if you entered it in the License window. This is the email address that your recipients see when they receive the email.

Reply Email Address — Defaults to your email address if you entered it in the License window. This is the email address that any recipient replies are sent to. This can be the same as the From Email Address, or it could go to the secretary's email, for example.

Subject Line — Defaults to "Letter from <your organization name>." You can edit this field.

Other File Attachments — Click **Add File**, and browse to the location of any file you want to send with the email. Click **Clear Files** to remove the attached files.

Type of Email — You can send three types of email. Select an option based on your preferences.

- **Email as images** — Send the text as an HTML email. This works with most email programs and keeps most of the format of the printed letters or statements. It doesn't require the recipient to have Adobe® Reader to view the image.
- **Email as Text** — Send the text of the letter without using an attachment. The formatting of this email doesn't look exactly like the letters or statements you send out in the mail. Most notably, it doesn't include pictures or bitmaps, which means digital letterheads, logos, and signatures don't display. While this option can be received by most email programs, it produces a visually-simple email.
- **Email with a PDF image of the document as an attachment** — Send a brief note in an email with an attachment that can be viewed and printed with Adobe® Reader. This produces an email attachment that looks exactly like the letters or statements you printed. However, the recipient must have Adobe® Reader to view it.

- If you select to email the statement or letter as an attachment, click the **Attachment Resolution** drop-down list to select the resolution. The resolution only affects images contained within the PDF. With a higher resolution, the images are clearer. However, the file size increases and takes more time and bandwidth to email.
- The **Email Body** field defaults to a message with your organization name and explains that the attachment should be viewed with Adobe® Reader. It also includes a link to download the reader if the person does not already have it. You can edit this message.

Preview — View the letter to be emailed. The email itself might look different depending on your email format settings.

Start Email — Email the letters to all the selected families or individuals.

Email Server Setup

The Email Server Setup tab contains technical information for connecting to your email server. Obtain the required settings from your system administrator or Internet provider.

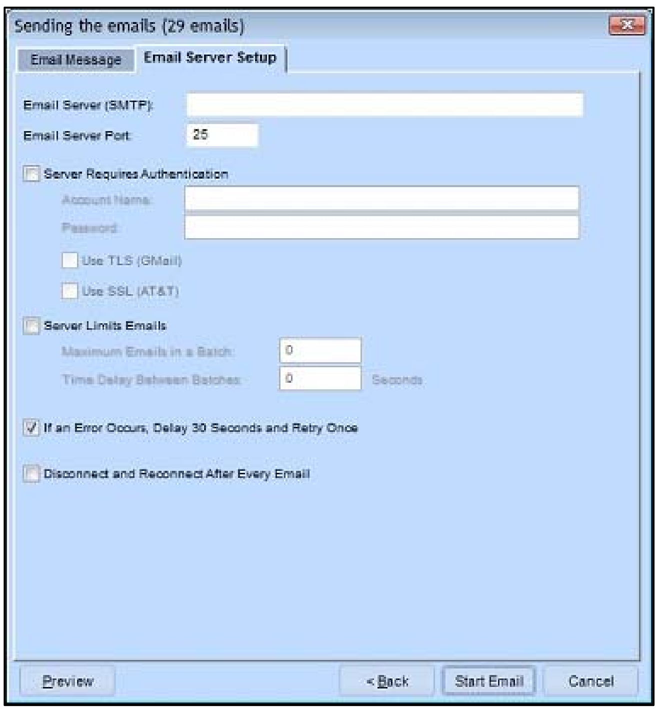

Fig. 11-37.

Email Server (SMTP) — SMTP stands for Simple Mail Transfer Protocol. Obtain these settings from your Internet provider's website or system administrator.

Email Server Port — The default setting is 25. However, you can obtain this setting from your Internet provider or system administrator.

Server Requires Authentication — Select if your server requires authentication. Enter your email account name and password. Select **Use TLS (Gmail)** or **Use SSL (AT&T)** if either of those is your email server.

Server Limits Emails — Some servers restrict the number or size of incoming and outgoing email messages. If your server does this, select this check box and enter the values.

If an Error Occurs, Delay 30 Seconds and Retry Once — Resend the emails after a 30-second delay in the event of an email server error.

Disconnect and Reconnect After Every Email — Select if you want your server to disconnect and reconnect after sending each email.

Preview — View the letter to be emailed. The email itself might look different depending on your email format settings.

Start Email — Email the letters to all the selected families or members.

Logging Letters

In the Letters, Visits, Etc. section of a family or individual's record, you can track correspondence. After you print a letter report, the program offers to log the letter correspondence in the Letters, Visits. Etc. section of the family or individual records.

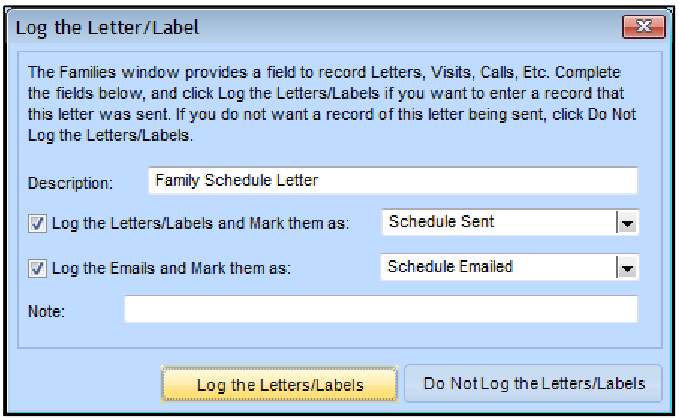

Fig. 11-38.

Enter a description of the letter and select one of the log options. The options in the drop-down lists are keywords from the Letter Types keyword list. You can also enter an optional note.

To automatically log the history of the letter correspondence, click **Log the Letters/Labels**. If you do not want to keep a record of this letter correspondence, click **Don't Log the Letters/Labels**.

Creating a Custom Report

The Select Report window has three command buttons labeled **Add**, **Delete**, and **Copy**.

Before adding a new report or modifying an existing report, preview the existing reports to determine if there's one similar to what you need. It's much easier to modify an existing report than it is to create a new one.

If you locate a report that's similar to what you need, click **Copy** to duplicate the original report and place it in the Easy Report sub-list. The report name is preceded by "(COPY)," and then you can edit the report name.

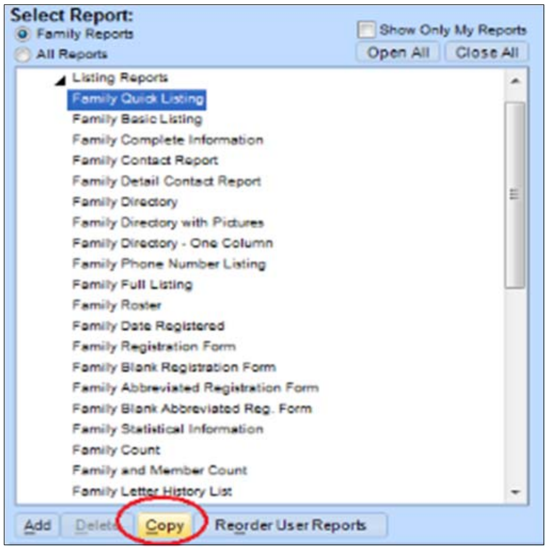

Fig. 11-39.

To copy a report

1. On the **Reports** tab, click the button related to the type of report you want. Click the triangle next to each group of reports to expand it and see the individual reports.

> **Useful Information**
> You can also click **Reports** in the navigation pane of any major program area to access the list of reports related to the data in the current window.

2. Select a report, and click **Copy**. The report is added to the appropriate Easy Reports section.
3. Click **Next**. Edit the name and description to describe the purpose of the report.
4. Select a report owner, and designate report access.
5. Click **Next** and follow the report wizard to define and customize the report.

If you can't locate a report similar to what you need, click **Add** to create a new report and place it in the Easy Report sub-list. The report name is preceded by "New <type> Report". Example: New List Report.

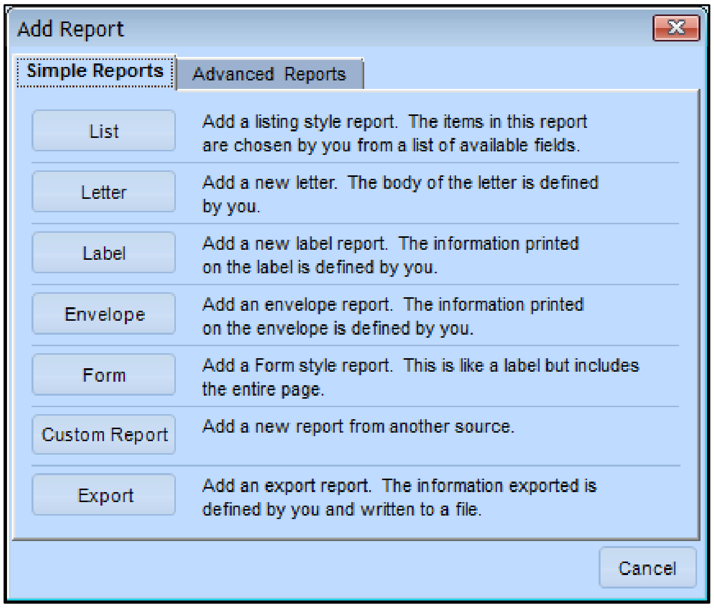

Fig. 11-40.

To add an Easy Report

Useful Information

We recommend outlining the information you want on the new report and making notes about the formatting of the new report before adding it. This gives you something to work from when adding your new report. Select a major category where the report will reside.

1. On the Reports tab, click the button related to the type of report you want. Click the triangle next to each group of reports to expand it and see the individual reports.

   Useful Information

   You can also click **Reports** in the navigation pane of any major program area to access the list of reports related to the data in the current window.

2. Under the appropriate reports section, click any report name, then click **Add**. The Add Report dialog box displays.
3. On the Simple Reports tab, click the type of report you want to create. The new report is added to Easy Reports section within the report group you selected.
4. For some reports (list and export reports, for example), the List of Fields to Print dialog box displays. Define which fields you want to include in your report. For other reports (letter, label, and envelope, for example), the Editing window displays, and you can define the content of your correspondence.
5. Edit the name and description of the report. Select a report owner, and designate report access.
6. Save your changes, and follow the remainder of the report wizard to define your report.

Useful Information

The Add Report dialog box also includes the Advanced Reports tab and the buttons **Report**, **Letter**, or **Label**. This requires that you use the Advanced Report Writer to create a report.

We don't provide support for the Advanced Report Writer; however, for an electronic copy of the ARW user guide, on the File menu, click **User Guides** > **Advanced Report Guide**.

You can save Easy Reports to a reusable storage device or hard drive to protect your information against loss. You can also install your Easy Reports on other computers in your office or share them with other organizations using PDS.

To save an Easy Report

1. Add or modify a report. For more information on creating easy reports, see Creating a Custom Report.
2. In the Select Report window, select the report that you created.
3. Click **Save as Custom Report**.
4. In the Save Custom Report Files dialog box, find the location where you want to save the report. Enter a file name, and click **Save**.

Five file types can be associated with an Easy Report, but some only exist with certain types of reports. You can create files with the following extensions: .udr, .cr, .rtf, .ini, and .rtm.

- The .cr file is only saved as a custom report. The .cr file is the primary file and the only file that displays.
- The .ini file contains settings from the last time you ran the report. It doesn't exist until you run the report again.
- The .udr file contains default information.
- The .rtf file is only used when you use the letter editor or label.
- The .rtm file only exists for Advanced Reports.

You can install Easy Reports written by other PDS users in your organization.

To install an Easy Report

1. In the Select Report window, click **Add**.
2. In the Add Report dialog box, click **Custom Report**. The Browse dialog box displays.
3. In the **Look In** drop-down list, select the appropriate storage drive. A list of custom reports displays.
4. Select the file name you want to add, and click **Open**. The report is added in its proper category.

Reordering User-Defined Reports

After you create several Easy Reports, you can reorder them in the Select Report window. You can also create new subgroups to use for further organization of your reports.

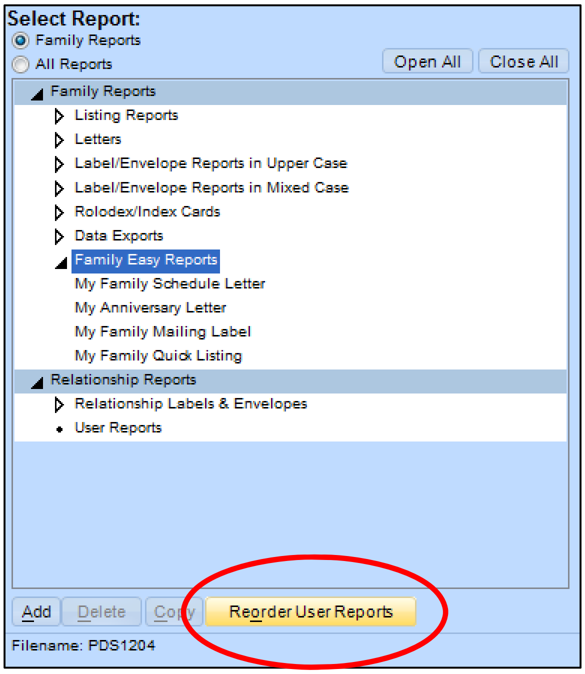

Fig. 11-41.

In the Select Report window, click **Reorder User Reports**.

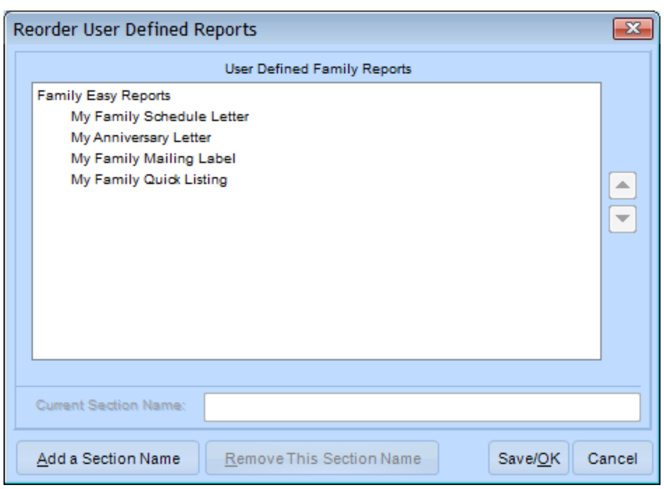

Fig. 11-42.

This dialog box only displays user-defined reports created in the selected report category. Use the arrows to move the selected report up or down in the list, or click and drag a report with your mouse.

To add a section to organize the reports in this list, click **Add a Section Name**. In the **Current Section Name** field, enter the name of the new section. Use the arrows to move the section up or down in the list.

In the example below, a new section was created entitled "My Correspondence" and the arrows were used to move three reports into the new section.

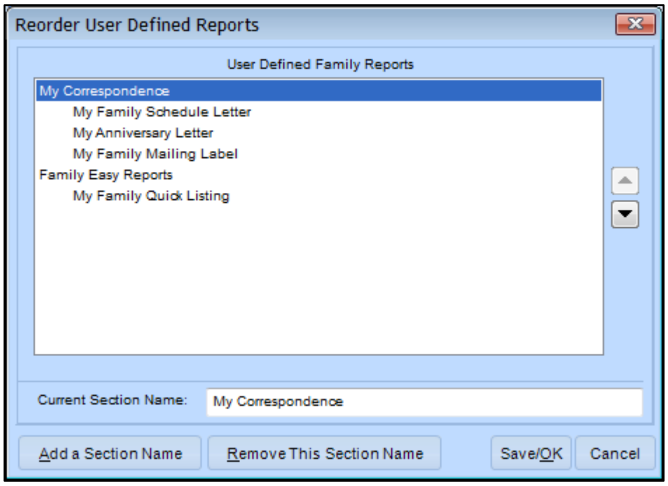

Fig. 11-43.

The next example displays the list in the Select Report window after the reports are reordered. Keep in mind that each time you create a new report, it is added to the bottom of the last section. You may want to reorder each new report after it is created.

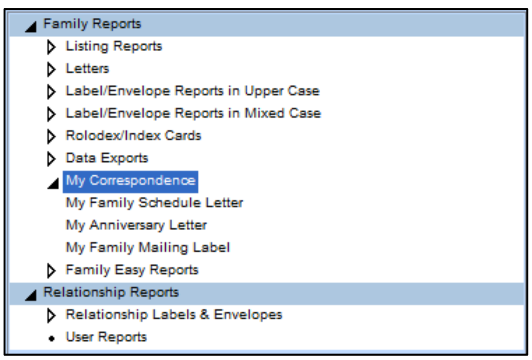

Fig. 11-44.

Modifying the List of Fields to Print

To create a new list report, in the Select Report window, select the report category where you want to add the report, then click **Add > List**. The List of Fields to Print dialog box displays.

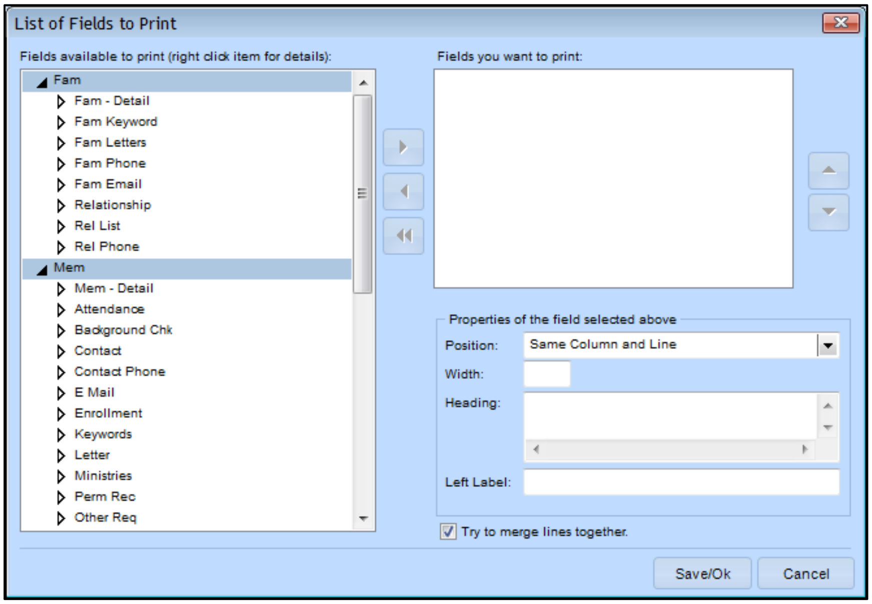

Fig. 11-45.

Or, if you have a list report that you like and want to modify it, select the report and click **Copy**. In the Overview window, click one of the layout links or click **Next** until you reach the Layout window. In the Layout window, click **Modify the List of Fields to Print**.

Select the fields as you would in a listing screen. Each selected field begins a new column.

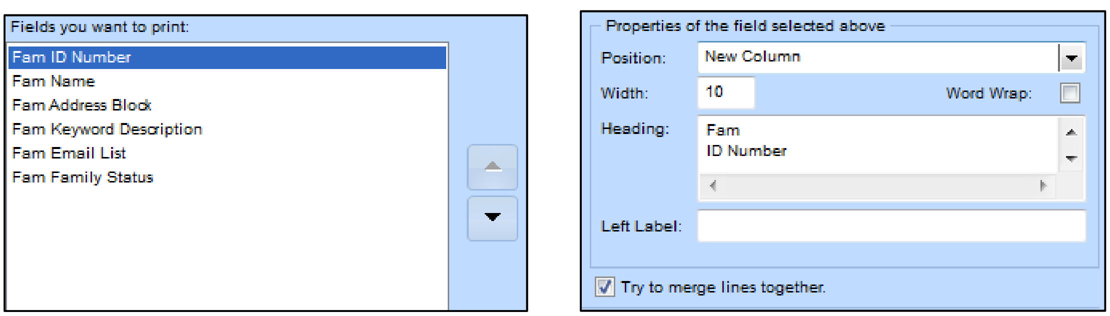

Fig. 11-46.

In the **Position** drop-down list, select where you want to place the field. Choices are **New Column**, **Same Column but on a New Line**, or **Same Column and on the Same Line**.

In the example below, the family's **Name** will print in the same column, but on a new line as their ID Number, and it will be indented three spaces.

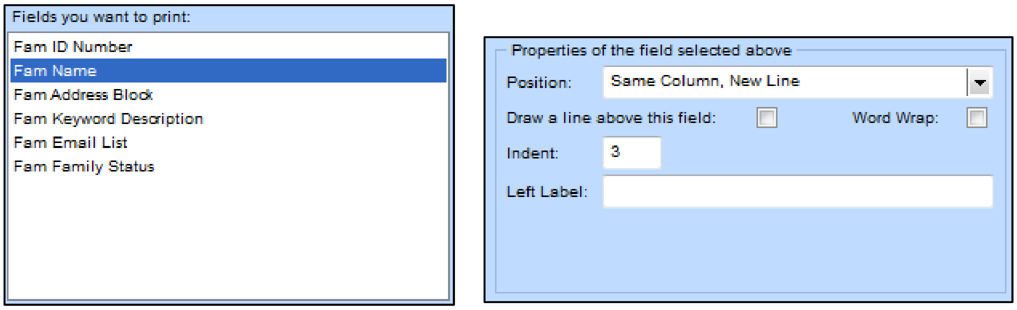

Fig. 11-47.

In the example below, the **Family Status** will be in the same column as the keyword description but will be on a new line, and will display a label on the left.

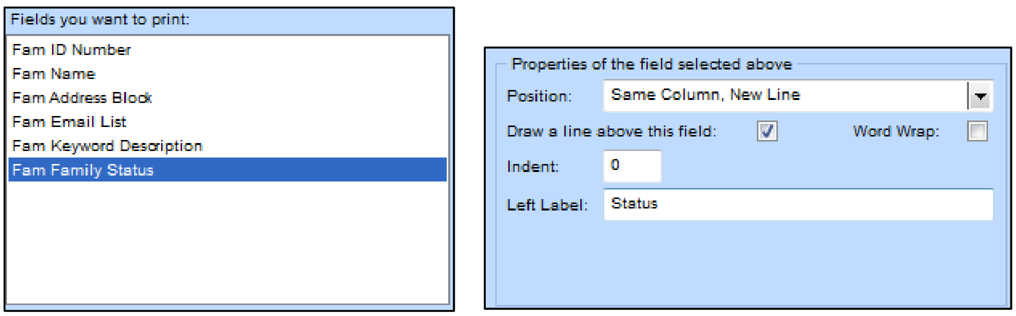

Fig. 11-48.

To place a line between this field and the one above it, select **Draw a line above this field**.

Setting the Label Layout

The Label Style section contains multiple label formats, including some manufactured by Avery®. You can select a label style from the **Style Name** drop-down list. Label layout and the text of the label are the formatting elements that make up your label design. To add new labels or modify existing ones, click **Edit Style**.

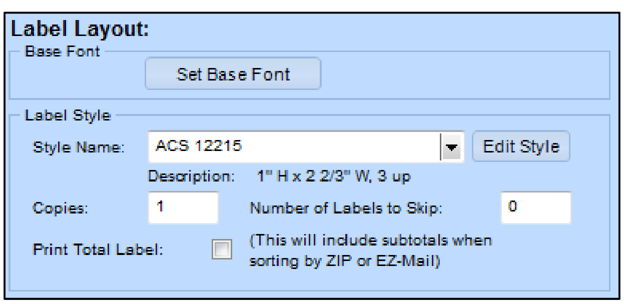

Fig. 11-49.

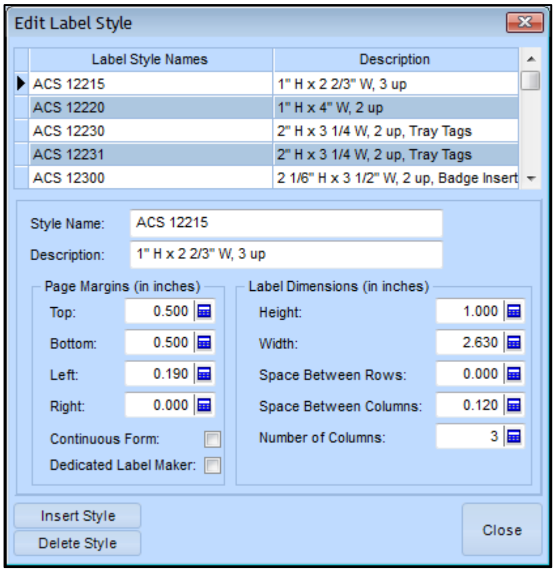

Fig. 11-50.

In the Edit Label Style dialog box, you can set all parameters required to print a sheet of labels, such as the margins, height and width of the labels, space between each row and column, and the number of columns. Once you have made your selections, click **Save** then **Close**.

In the Label Layout window, in the **Copies** field, enter the number of labels to print per individual. You can reuse partially printed sheets of labels by entering the number of labels to skip.

Important Note

Only do this if you are printing to an ink-jet printer. We do not recommend running partially printed sheets of labels through a laser print because the label could peel off inside the printer.

To modify the layout of the address information, click **Modify the Layout of the Address Information**.

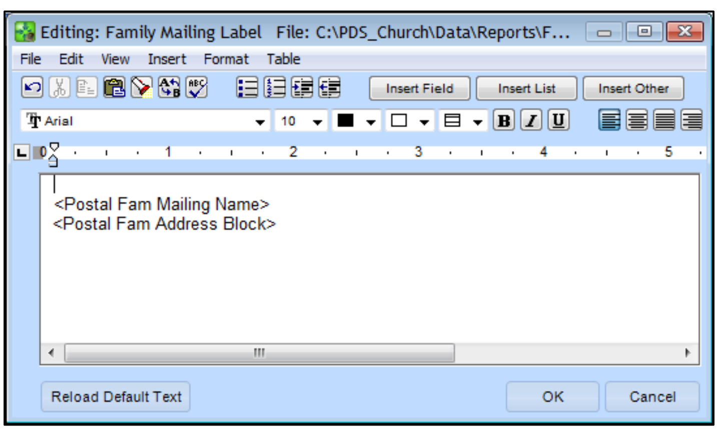

Fig. 11-51.

This is the same editor you use to create letters. In this editor, you can select the font, enter text, insert fields, etc. When you set up or modify the layout of address information, be careful when you indent fields that may contain multiple lines of text, such as the Address Block. See Indenting Fields.

Setting the Envelope Layout

The formatting elements that make up your envelope design are the envelope layout, return address style, and text of the envelope. Before you set the layout design for your envelopes, make sure you select the appropriate printing options for envelopes.

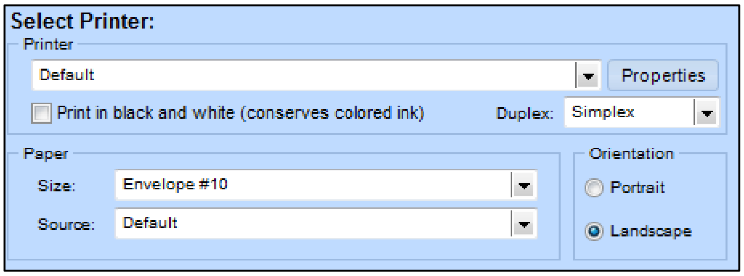

Fig. 11-52.

In the Select Printer window, indicate the paper size, source, and orientation for the envelopes you are printing. In the **Size** drop-down list, select the envelope size. A common envelope size is #10 envelope 9.5 x 4.13 in. Select the source, and select **Landscape** for the envelope orientation.

Once you have selected the appropriate printing options, in the Envelope Layout window, you can set the envelope style, return address style, and text of the envelope. To add new envelope styles or modify existing ones, under **Envelope Style**, click **Edit Style**.

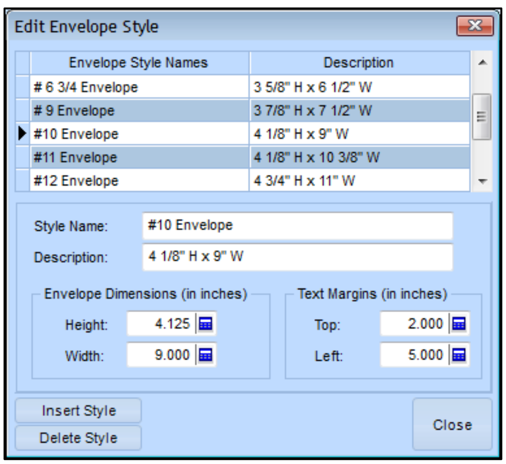

Fig. 11-53.

In the Edit Envelope Style dialog box, you can set the envelope dimensions and margins. Once you have made your selections, click **Save** then **Close**.

To add new return address styles or modify existing ones, under **Return Address Style**, click **Edit Style**.

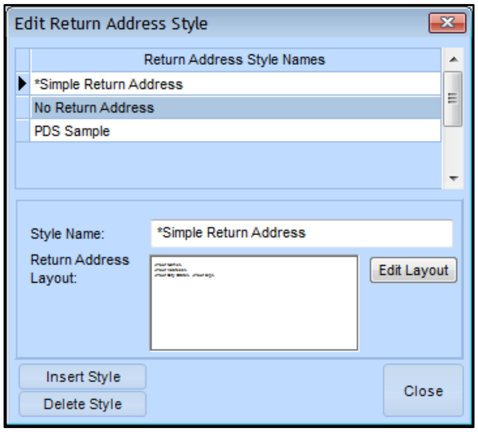

Fig. 11-54.

In the Edit Return Address Style dialog box, you can modify the return address text. Click **Edit Layout**. This is the same editor you use to create letters. In this editor, you can select the font, enter text, insert fields, etc.

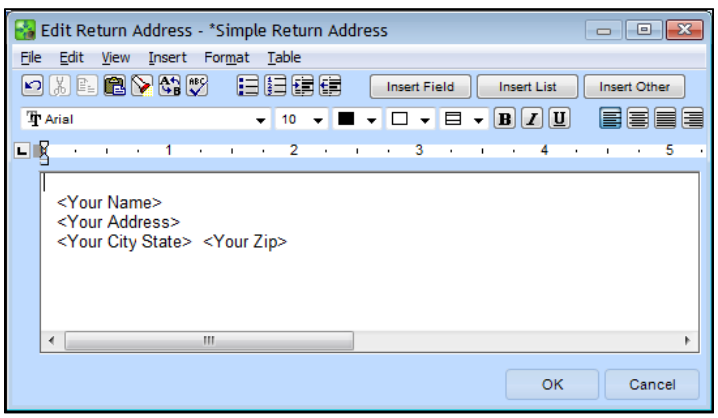

Fig. 11-55.

Defining Forms

Creating a form report is similar to creating a label report, except that a form takes up an entire page per family or member. This is useful for creating information forms for the family or individual to fill out and send back to the organization.

To add a form, in the Select Report window, click **Add > Form**.

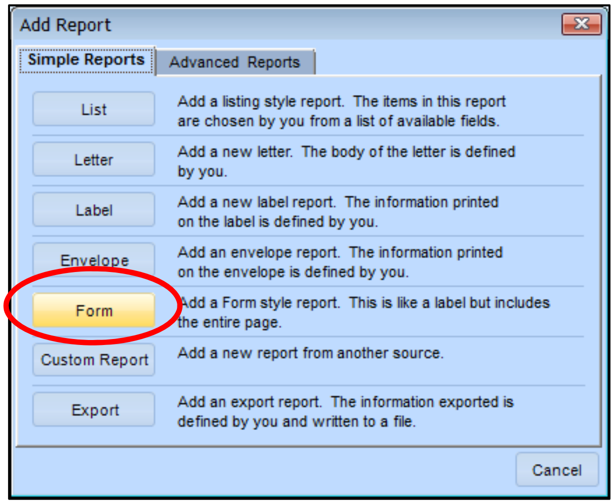

Fig. 11-56.

A new form is added and the New Form editor displays. In this editor, you can enter text and insert fields, which gives you the ability to print data that the family or individual has provided so they can verify it.

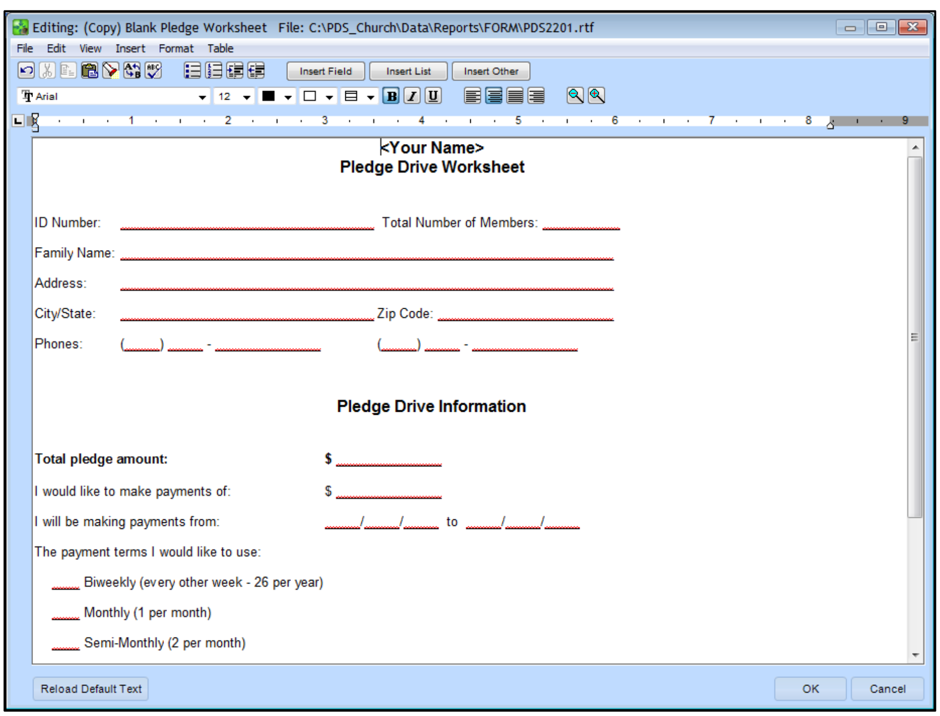

Fig. 11-57.

Exporting Data

One of the most common custom reports is an export report. Export reports are similar to list reports, but the data is sent to a file rather than a printer. You can export information to a word processor, a spreadsheet, Microsoft® Outlook®, or another program.

To define an export report

1. In the Select Report window, select the report category where you want to add the export.
2. Click **Add > Export**. The List of Fields to Print dialog box displays.
3. To select data fields to include in the report, click **Modify the List of Fields to Export**. In the dialog box, under Fields Available to Print, select the field names you want to include. Click the right arrow button to move the fields to **Fields you want to print**. Click **Save/OK**.
4. In the Overview window, click **Edit** to enter the report's name and description. If you have access to designate reports, you can select a report owner and report access. Click **Next**.
5. In the Export Properties window, click the **File Format** drop-down list to select one of the following file formats:
    - **Comma Separated Values (CSV)** — Creates a text file with data items separated by commas. This format includes headings.
    - **XML** — Creates an Extensible Markup Language file that is useful for sharing data on the web.
    - **Line/Form Delimited** — Creates a file with a line feed at the end of each field and a form feed at the end of each record.
    - **Line/Form Delimited With Headings** — Creates a file with column headings, a line feed at the end of each field, and a form feed at the end of each record.
    - **Tab Delimited** — Creates a text file with data items separated by tabs.
    - **Tab Delimited With Headings** — Creates a text file with column headings and data items separated by tabs.
    - **Fixed Width** — Creates a file that always prints the same number of characters for a field. For example, if you print **ID (10 characters)**, **Name (100 characters)**, and **ZIP Code (15 characters)** in a Fixed Width format, the file will always contain exactly 10 characters for the ID, 100 characters for the Name, and 15 characters for the ZIP Code. If a field contains more characters than these, it will be clipped. If the information in the field is shorter than the character length, the length is filled with spaces.
    - **CSV Without Headings** — Creates a text file with data items separated by commas but without headings.
6. In the **Filename** field, enter the name of the file you're creating. To open the browse dialog box, click .
7. To alter the list of selected fields, click **Modify the List of Fields to Export**.
8. Click **Next**.
9. Make any additional selections you want. Click **Build** to export the data to a file.

Questions

Q: What are the six steps to running a report?

A: ____

____

____

____

____

____

Q: What are the six types of reports?

A: ____

____

Q: How do you access reports?

A: ____

____

Q: Your neighbor church has created a wonderful family listing report. How would they save the report? How would you install it?

A: ____

____

____

Q: What is a style? How many styles can you create?

A: ____

____

Q: What are Smallest Margins?

A: ____

Q: What is Simple Selection - Never Saved?

A: ____

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12: Keywords

Keywords represent data that is used many times in the program. Keywords are saved in list groups and simplify data entry, eliminating the possibility of spelling errors and inconsistent usage. You have control over each keyword list, and can add or delete terms as needed. Similar terms in the list can be combined. Examples of keywords include city/state names, phone descriptions, sacrament date names, etc.

Maintaining Keywords

To access keyword groups, on the File menu, click **Keywords**.

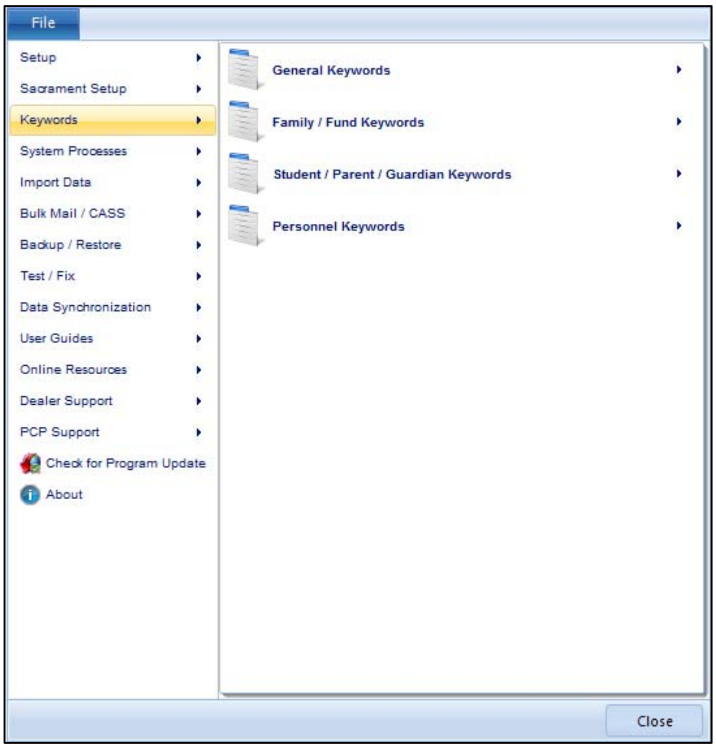

Fig. 12-1.

If you select any keyword list menu items, a keyword maintenance dialog box displays.

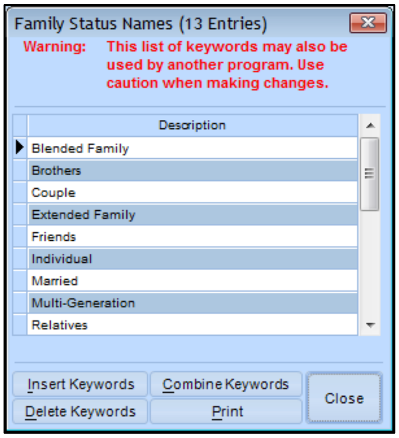

Fig. 12-2.

You can also access the maintenance dialog box from wherever the keywords display in the program. At the end of a keyword field, click , then **Manage**. The keyword maintenance dialog box displays.

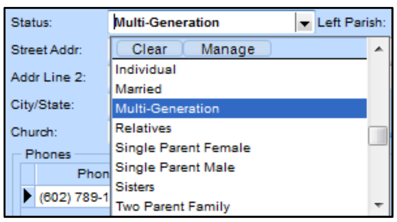

Fig. 12-3.

If you need to correct a keyword entry, just click the entry and enter the correct text.

Keyword Commands

Each keyword list has four major commands at the bottom of the dialog box that make it easy to maintain.

Insert — Adds a new keyword to the list.

Delete — Removes a keyword from the list. This removes the keyword from all records currently using it.

Combine — Overwrites a keyword with another. For example, if you have "New York City" and "NYC" as city/state keywords, you can combine these entries. All records using those keywords are changed to the keyword you choose to keep.

Print — Prints a list of the keywords.

Use the two additional commands, **Save/OK** and **Cancel**, to save or cancel changes to the keyword list.

If you make a change to a keyword that is used by a record, all occurrences of the keyword reflect the change. For example, you have phone description keywords of **Home**, **Office**, and **Cell**. If you change **Office** to **Work**, any record with the phone description of **Office** is changed to **Work**.

Deleting Keywords

To delete keywords, click **Delete**. In the dialog box that displays, select the entries you want to delete, then click **Delete/OK**. This removes the entries from the keyword list and from all records using the selected keywords. This may also affect other PDS Office programs if you share information between programs.

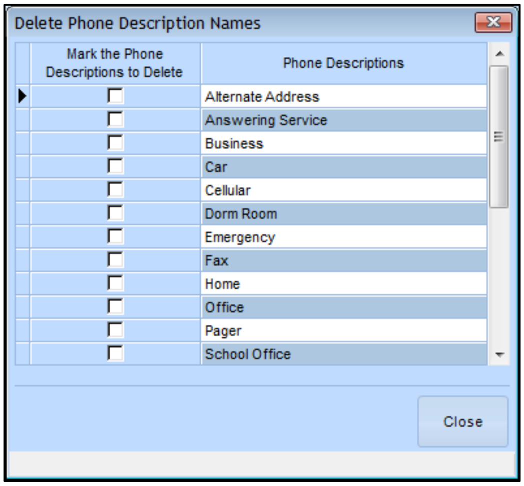

Fig. 12-4.

Useful Information

This command requires exclusive access to the database. Only one user can be logged in to the program to perform this action. If your database includes multiple PDS Office programs, all users must be logged out of those programs, too.

Combining Keywords

To combine two entries, click **Combine**. In the list on the left, select the entry you want to remove, and in the list on the right, select the entry you want to keep, then click **Add to List of Changes Below**. Repeat this process to combine multiple keywords at one time. Once you finish adding keyword changes to the **List of changes to be made** section, click **Combine/OK**.

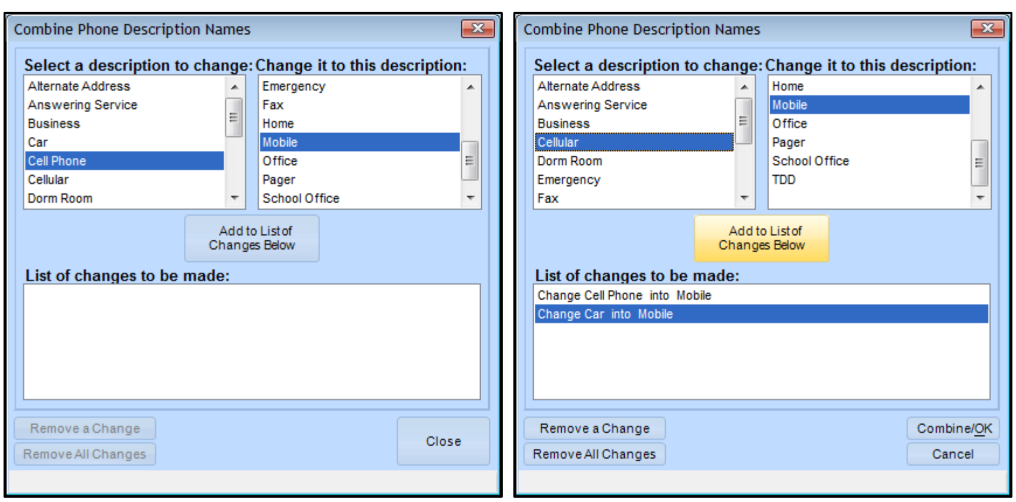

Fig. 12-5.

Keyword Lists

The following sections describe the keyword selections on the menu.

General Keywords — Relate to contact information are common among most of the PDS Office programs.

Family / Fund Keywords — Used for family and fund information.

Student / Parent / Guardian Keywords — Used for individual records.

User Keywords — This is the last item for student/parent/guardian keywords. This list contains 11 keywords you can define. These keywords display in the member's Personal window.

Personnel Keywords — Used for personnel records.

General Keywords

The General Keywords category contains keyword lists for data you may enter for family, student, parent/guardian or personnel records. To access general keyword lists, on the File menu, select **Keywords > General Keywords**.

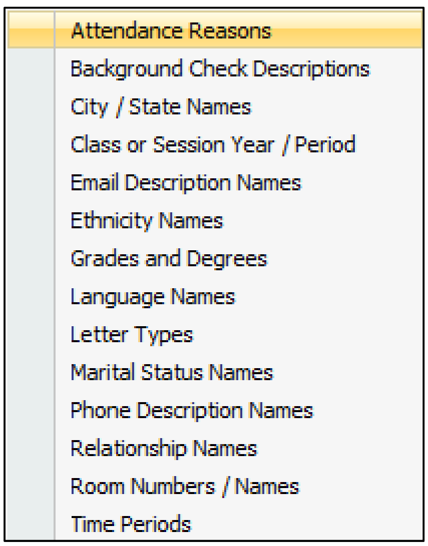

Fig. 12-6.

Attendance Reasons

This keyword list contains reasons for why an individual could not attend a class. This information is maintained on the **Information > Students > Attendance** window and the **Personnel > Catechists > Attendance/History** window.

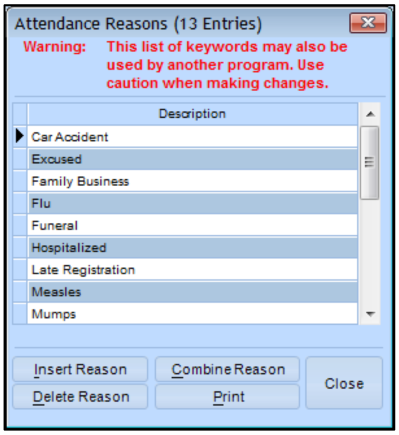

Fig. 12-7.

Background Check Descriptions

This keyword list contains various types of background checks conducted for employees and volunteer members. On the individuals Safe Environment window, you can record the description of the background check, date, result, and important notes.

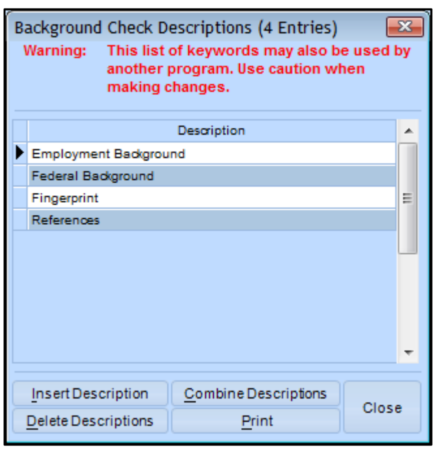

Fig. 12-8.

City/State Names

This keyword list contains the city/state, country code, and default city/state names used in the database. You can include cities in different countries using their appropriate postal code format.

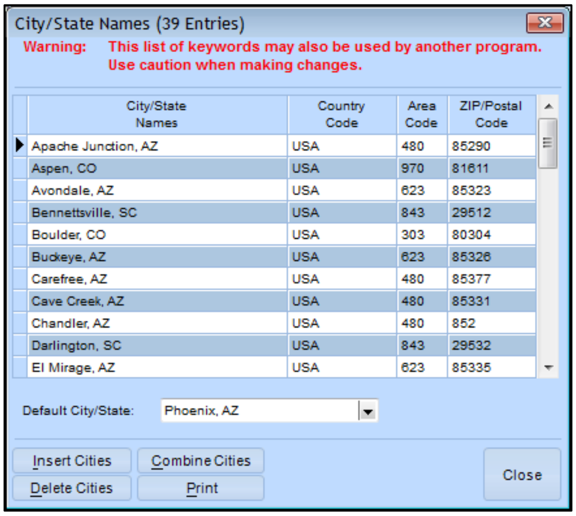

Fig. 12-9.

You can add other cities or states to this keyword list.

Default City/State — The city and state entered in the License Information window displays here when you install the program. When you press **Enter** or **Tab** in a City/State field, the default city/state is entered. If you do not want a default city/state, leave this field blank. Default values can be overwritten when entering information.

Country Code — Determines the format of the zip/postal code:

- **USA** — Up to five digits.
- **Canada** — Six characters in the following format: Letter-Number-Letter-(space)-Number-Letter-Number.
- **Other** — Up to ten characters.

Area Code — If the majority of area codes in the city are the same, enter a default area code here. This area code is automatically entered in phone number fields when this city keyword is selected. You can overwrite the default, if necessary.

Zip/Postal Code — If the city's ZIP/postal codes begin with the same three or five digits, enter a default ZIP/postal code here. These digits are automatically entered in ZIP/postal fields when this city keyword is selected. Then, you only have to enter the remaining digits of the postal code. You can overwrite the default, if necessary.

Class or Session Year/Period

This is a list of session periods that will enable you to set up a session for the current period and also a session for the next period. This is helpful when enrolling pre-registering students for next year in the current year.

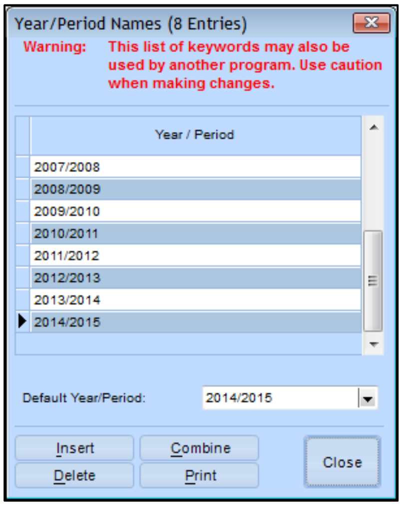

Fig. 12-10.

Email Description Names

This keyword list contains location descriptions for the various types of email addresses used by families and individuals.

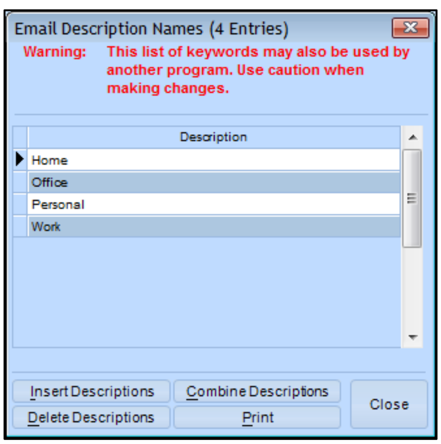

Fig. 12-11.

Ethnicity Names

This keyword list contains the descriptive names for race, origin, or culture.

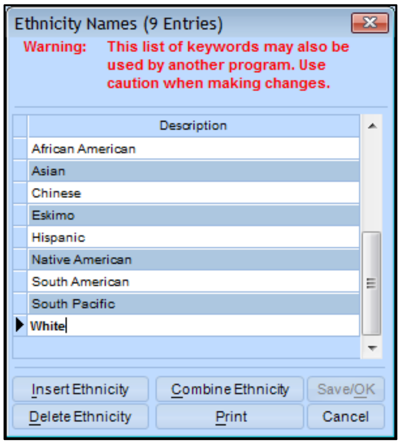

Fig. 12-12.

Grades and Degrees

This keyword list contains grade levels and degrees. Examples include. To arrange the grades in the proper order, click **Reorder**.

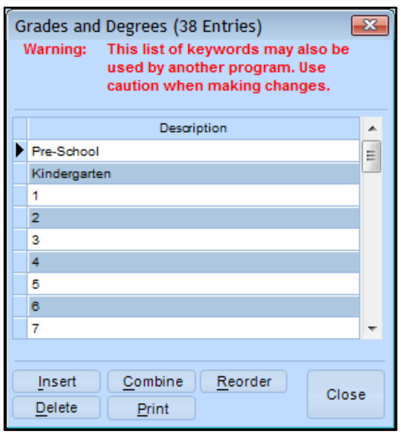

Fig. 12-13.

Language Names

This keyword list contains various languages spoken by family members. If there are multiple languages spoken, put the primary language first followed by a slash, such as "English/Spanish".

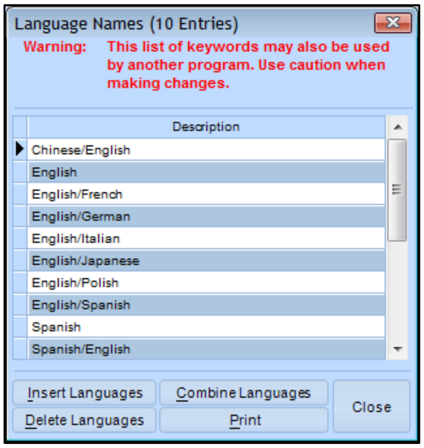

Fig. 12-14.

Letter Types

This keyword list contains the types of letters sent to families, individuals, or other contacts you may call or visit.

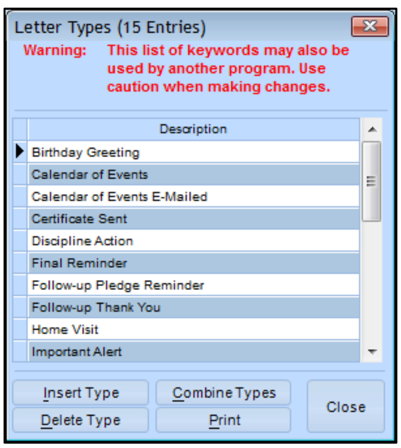

Fig. 12-15.

Marital Status Names

This keyword list contains terms that describe the marriage status for each member in the family.

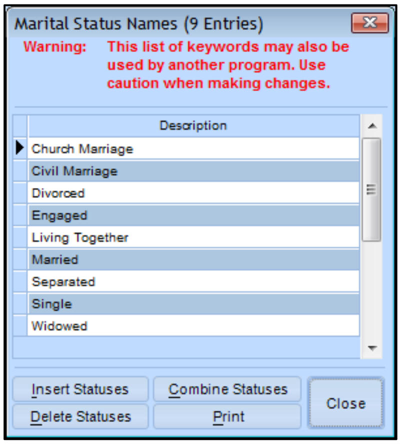

Fig. 12-16.

Phone Description Names

This keyword list contains types of phone numbers that people use.

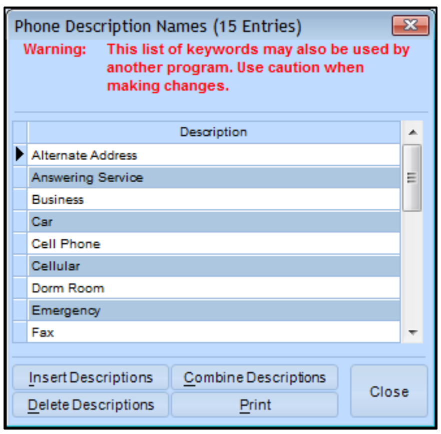

Fig. 12-17.

Relationship Names

This keyword list contains typical relationship descriptions and the default member type associated with the relationship.

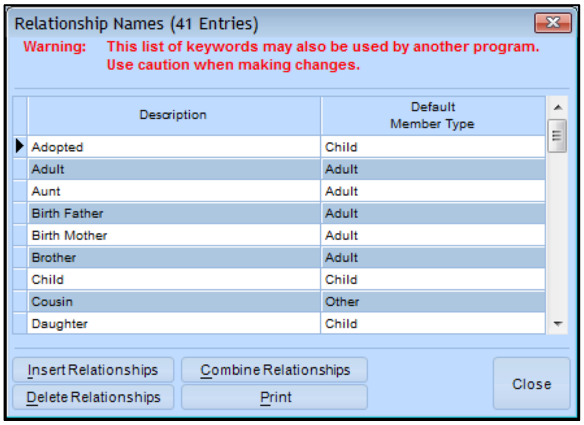

Fig. 12-18.

Room Numbers/Names

This is a list of room numbers and names associated with class sessions.

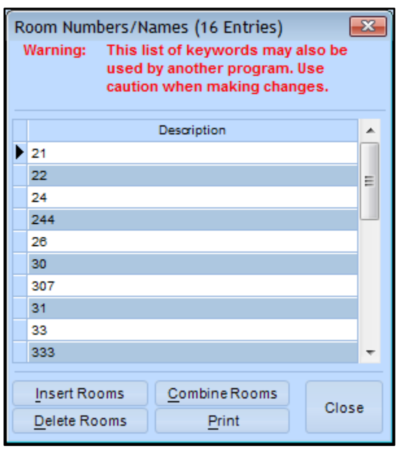

Fig. 12-19.

Time Periods

This is a list of class session times.

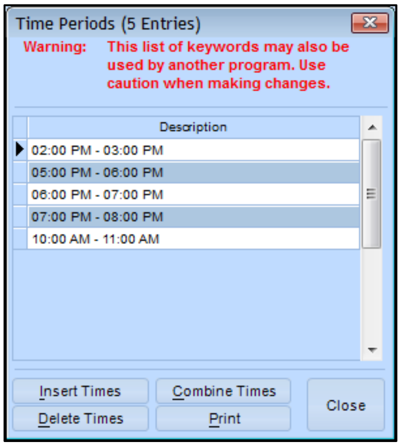

Fig. 12-20.

Family/Fund Keywords

The Family/Fund Keywords category contains keyword lists for data you may use when entering families and funds.

Family User is a customizable field that displays below the City/State field on the Families Primary Information window.

To access family/fund keyword lists, on the File menu, select **Keywords > Family/Fund Keywords**.

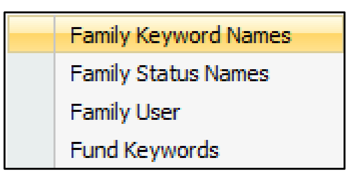

Fig. 12-21.

Family Keyword Names

This keyword list contains family descriptions or terms used to enter information that is not covered by other family fields.

Useful Information

In a shared database, each Office program can have its own list of family keywords, but if you want to, you can share the Church Office family keywords with the other programs. To do this, you must indicate you want to share family keywords in the Initial Setup window of each program.

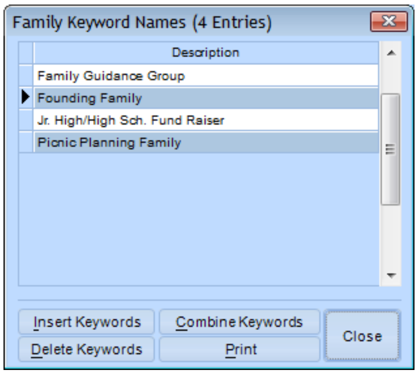

Fig. 12-22.

Family Status Names

This keyword list contains descriptions for the nature of the relationship of the family members in a particular household. This information is named **Status** throughout the program.

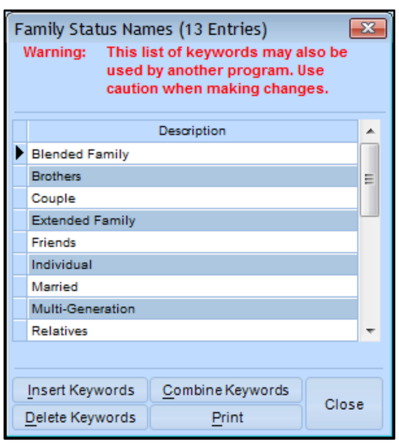

Fig. 12-23.

Family User

This keyword field is customizable and displays below the City/State field on the Families Primary Information window. This keyword field is commonly used to maintain the name of the church the family attends.

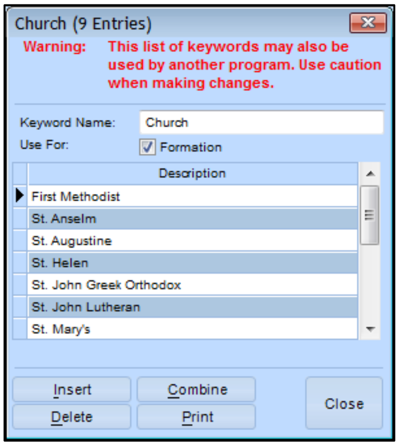

Fig. 12-24.

Fund Keywords

This keyword list contains terms used in the Fund window to describe an attribute of a particular family with regard to the funds.

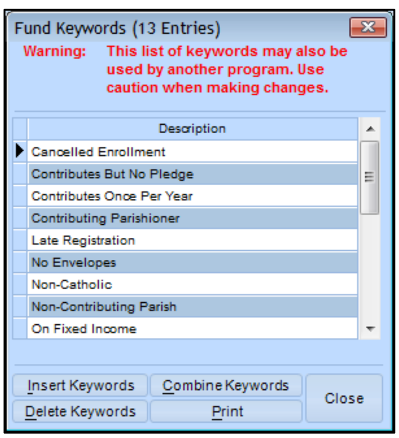

Fig. 12-25.

Student / Parent / Guardian Keywords

The Student/Parent/Guardian Keywords category contains keyword lists for data you might enter in student or parent/guardian records. To access student/parent/guardian keyword lists, on the File menu, click **Keywords** > **Student/Parent/Guardian Keywords**.

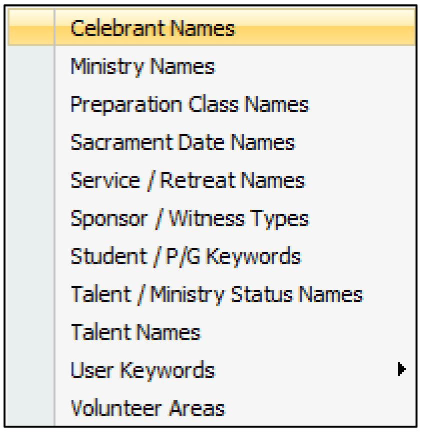

Fig. 12-26.

Celebrant Names

This keyword list contains the names of those who celebrate Mass or perform other services.

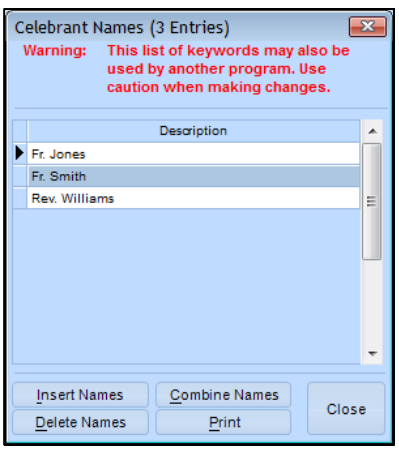

Fig. 12-27.

Ministry Names

This keyword list contains types of ministries. To move a keyword from the Ministry Names list to the Talent Names list, select the keyword and click **Move to Talent List**.

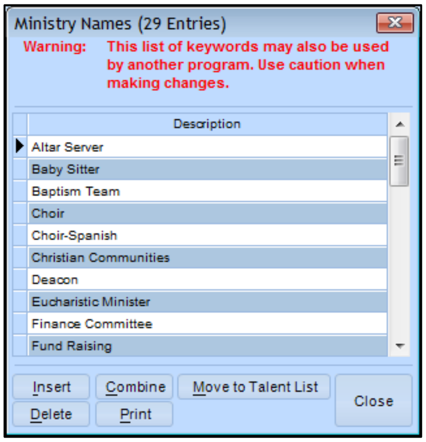

Fig. 12-28.

Preparation Class Names

This is a list of class names that parents take in conjunction with their students' sacrament classes.

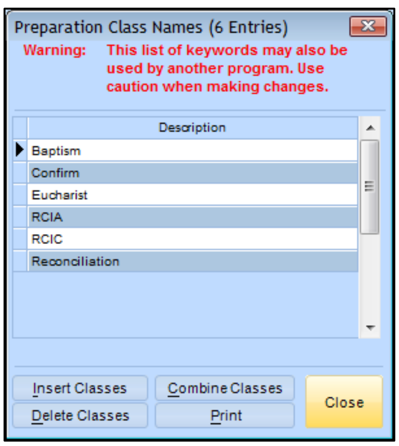

Fig. 12-29.

Sacrament Date Names

This keyword list contains sacrament names.

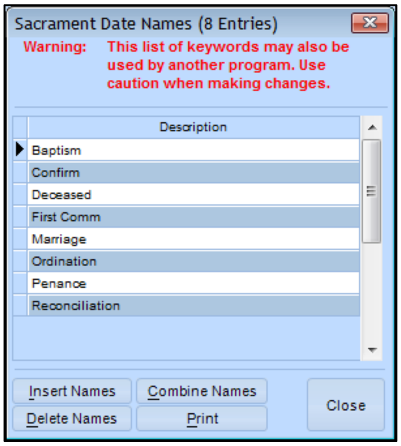

Fig. 12-30.

Service/Retreat Names

This is a list of service or retreat names that students might attend.

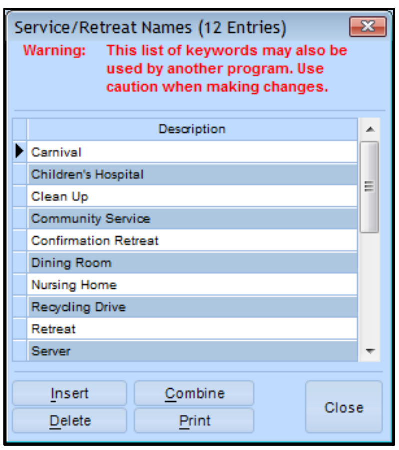

Fig. 12-31.

Sponsor/Witness Types

This keyword list contains types of sponsors and witnesses for various sacraments.

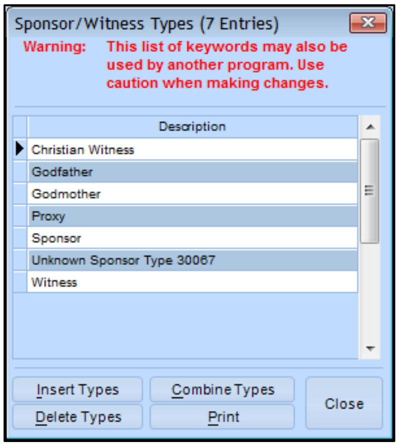

Fig. 12-32.

Student / P/G Keywords

This list is used to describe various aspects pertaining to individuals. It can be used for many different purposes.

Useful Information

This list is separate for each PDS Office program. However, the other common member keyword lists are shared and can be modified by anyone with access privileges.

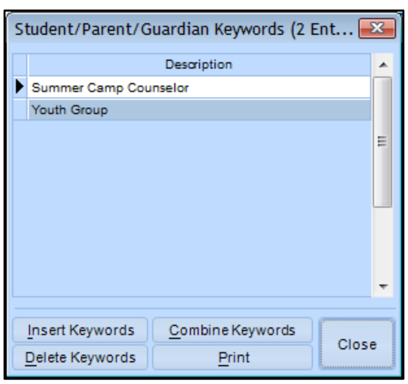

Fig. 12-33.

Talent/Ministry Status Names

This keyword list contains names that describe the status of a person's involvement in a talent or ministry. The status can also identify needs, the willingness to volunteer, or the need for a reply. To default each status to **Involved** when printing reports, enter **Yes** in the **Currently Involved** column. This reduces data entry work.

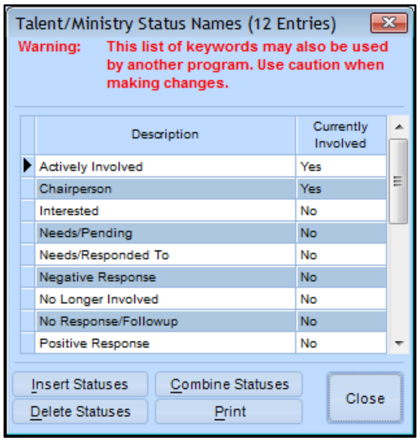

Fig. 12-34.

Talent Names

This keyword list contains talents or services that a member is willing to provide. Record the status of that talent or service using terms from the Talent/Ministry Status Names list. To move a keyword from the Talent Names list to the Ministry Names list, select the keyword and click **Move to Ministry List**.

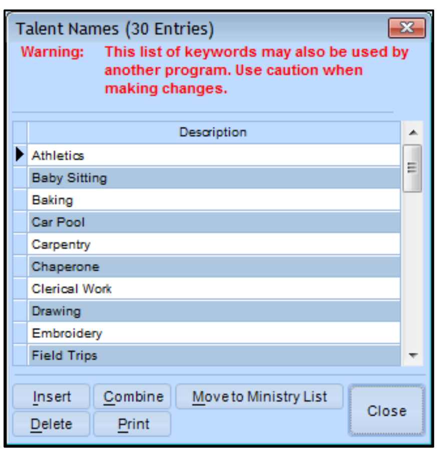

Fig. 12-35.

Volunteer Areas

This is a list of Formation-related areas that a parent/guardian might volunteer.

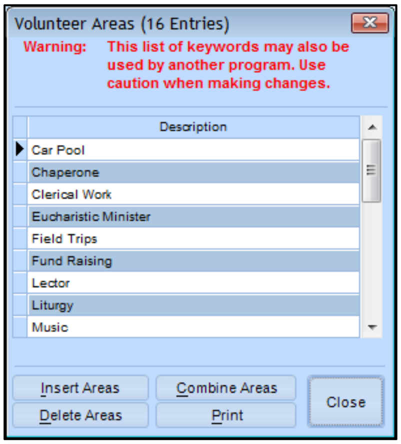

Fig. 12-36.

User Keywords

There are numerous User Keyword fields. You can assign the name of the keyword, such as "Occupation" or "District", and set up the options in the keyword list. For example, under Occupation, you can enter "Accountant", "Secretary", "Doctor", and so on.

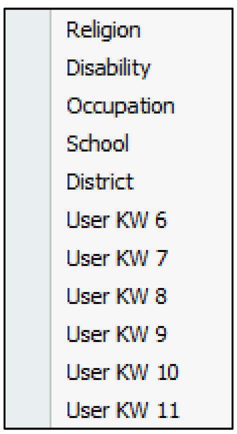

Fig. 12-37.

By default, the first three User Keyword names are set up. These can be changed even if you transferred data from an earlier version of PDS. In order for user keywords to display on the Personal windows, you must assign a name to the keyword.

To indicate what programs can view the user keyword, select the appropriate **Use For** check boxes.

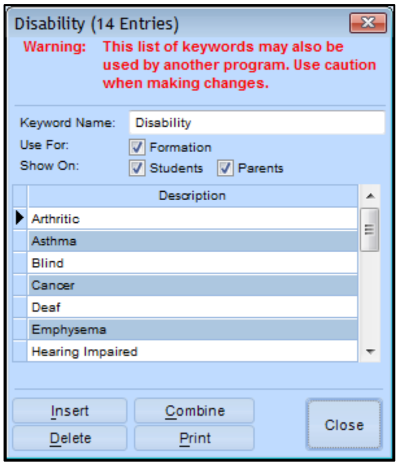

Fig. 12-38.

Select the **Show On** check boxes to indicate whether this user keyword will appear on student records, parent records, or both.

Personnel Keywords

The Personnel Keywords category contains keyword lists for data you would enter in personnel records.

To access personnel keyword lists, on the File menu, select **Keywords > Personnel Keywords**.

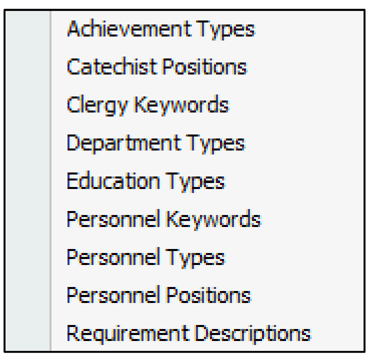

Fig. 12-39.

Achievement Types

This keyword list contains types of achievements, certificates, honors or awards.

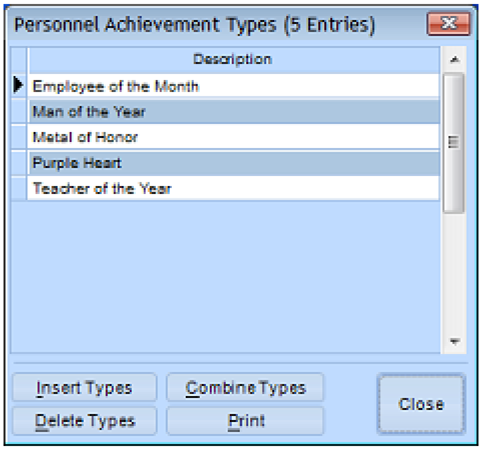

Fig. 12-40.

Catechist Positions

This is a list of positions a catechist could hold. For each class within the catechists List of Sessions, you can define the position they hold. For example, someone could be a “catechist” for one class and a “catechist’s aide” for another class in the List of Sessions on the Catechist Schedule window.

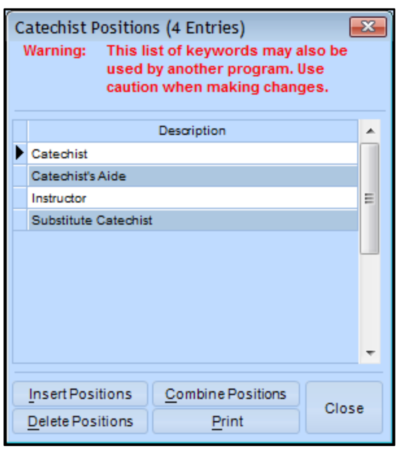

Fig. 12-41.

Clergy Keywords

This keyword list contains clergy descriptions or terms used to enter information that is not covered by other clergy fields.

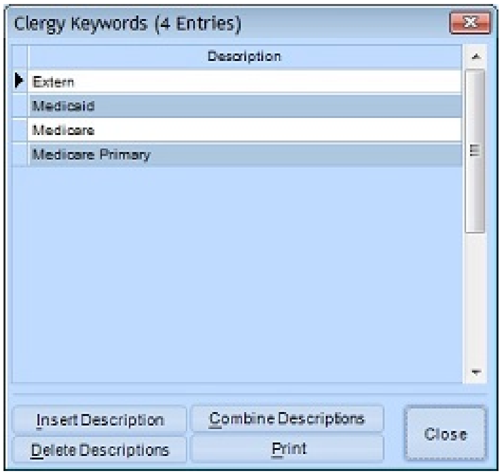

Fig. 12-42.

Department Types

This keyword list contains types of departments used for personnel assignments.

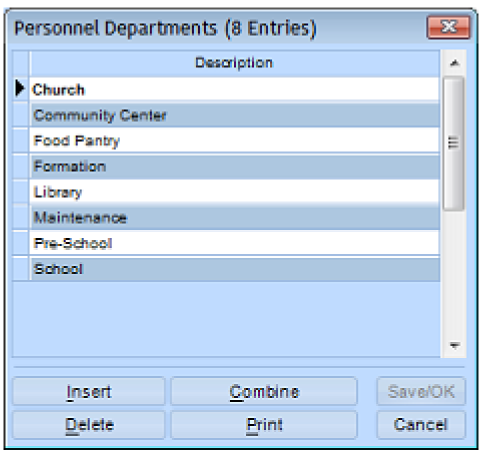

Fig. 12-43.

Education Types

This keyword list contains types of education used for Education/Credentials personnel information.

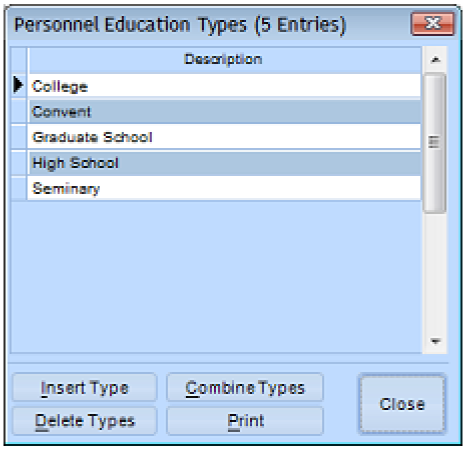

Fig. 12-44.

Personnel Keywords

This keyword list contains personnel descriptions or terms used to enter information that is not covered by other personnel fields.

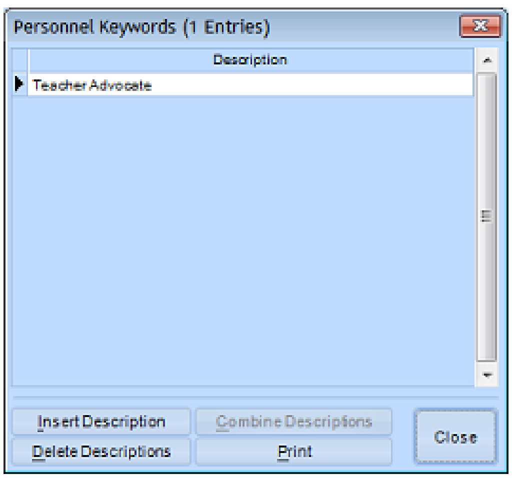

Fig. 12-45.

Personnel Types

This keyword list contains types of personnel.

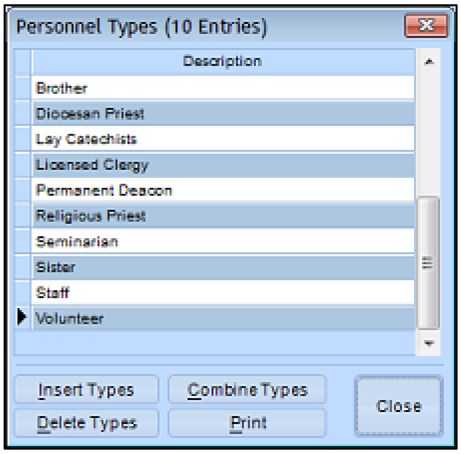

Fig. 12-46.

Personnel Positions

This keyword list contains names that describe the positions used for personnel assignments.

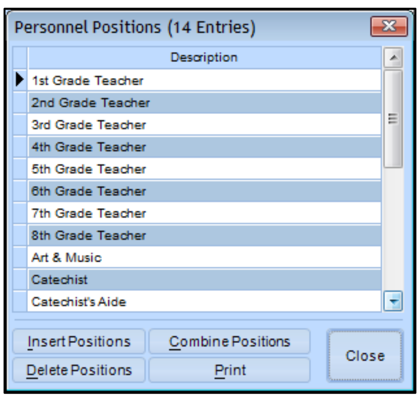

Fig. 12-47.

Requirement Descriptions

This keyword list contains requirements that members must meet before they can do volunteer work or become employed by your organization. Enter a description of the requirements in this keyword list.

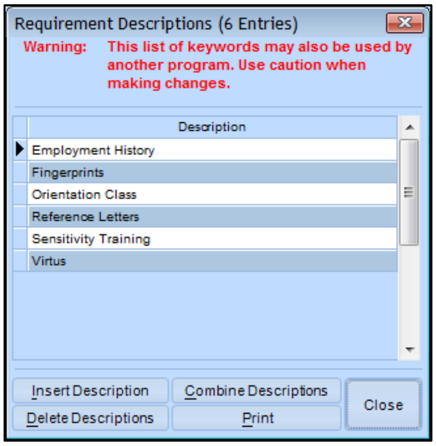

Fig. 12-48.

Exercises

Exercise #1: Make a new User Keyword.

1. Create a user keyword called Ice Cream, with entries of Chocolate, Strawberry, and Vanilla.
2. Go to a student record and select **Strawberry** as the Ice Cream preference.
3. Return to the keyword maintenance dialog box and change Strawberry to Cherry.
4. Return to that student record to see the change.

Exercise #2: Combine two keyword entries.

1. Add an entry called Black Cherry to the Ice Cream user keyword.
2. Go to a student record and select Black Cherry as the Ice Cream preference.
3. Combine the keyword entries of Black Cherry and Cherry, with Cherry being the remaining keyword.
4. Return to that student record to see the change.

Exercise #3: Delete a keyword entry.

Delete the entry Cherry in the Ice Cream keyword.

Questions

Answer these questions pertaining to keywords.

Q: How many User Keywords are available? What windows do they appear on?

A: ____

Q: How many entries can you have in each keyword list?

A: ____

Q: What are the four commands available in every keyword list?

A: ____

Q: What is the extra command on the Grade keyword list?

A: ____

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13: Listing Screens

Each major section of the program has a listing screen, including the Families, Students, Tuition & Fees, Parents & Guardians, Class Schedules, and all Personnel windows.

In each of these windows, in the navigation pane, click **Listing Screen**. In these listing screens, you can view and print a list of records. To display the list in a larger window, click **Zoom**.

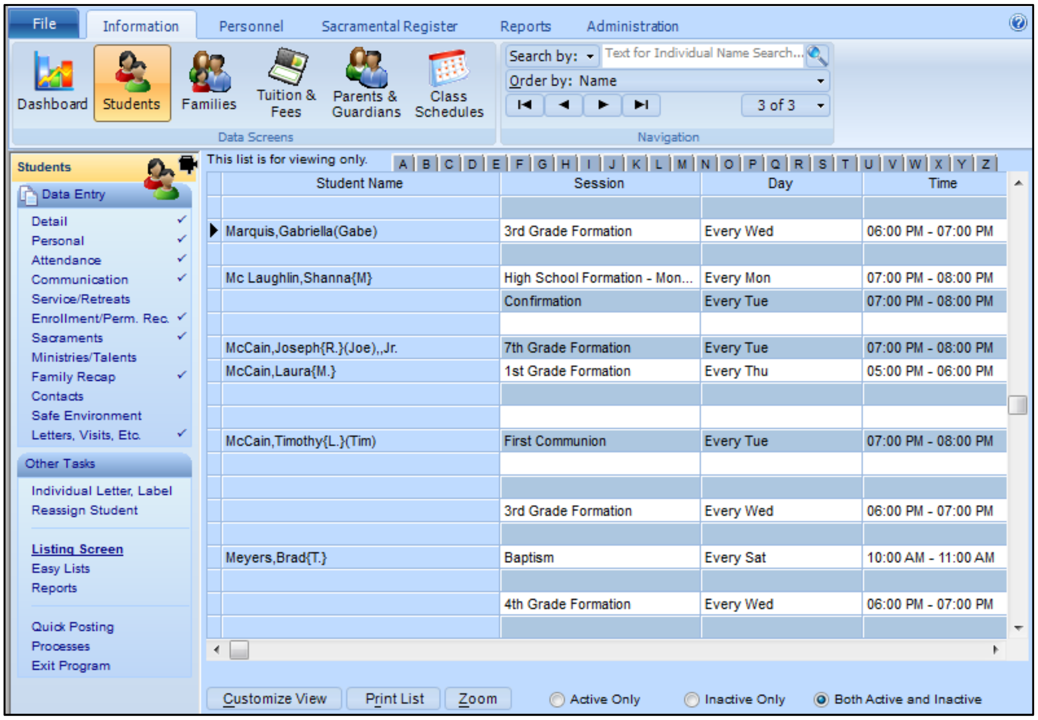

Fig. 13-1.

Using the Listing Screen

- To quickly jump to records beginning with a certain letter, click the rolodex tabs at the top of the window.
- To locate a certain record, use the Navigation tools. You can look up a particular family, individual, or fund.
- Select whether you want to display active, inactive, or all records.
- Inactive records display in red in this window, but do not print in reports unless you select to include them.
- In the grid, rows display in alternating colors so you can more easily view information when scrolling horizontally.
- Each row displays one item, such as information on a single family. If there is more than one sub-item, the second item displays in another row. For example, if there are multiple phone numbers, each number displays in a new row.
- When the first column is a solid color, it is "locked" and remains visible when you scroll horizontally. To lock or unlock the first column, click **Customize View**.

- When the list is wider than the window size, a horizontal scroll bar displays at the bottom of the list. When the list is longer than the window size, a vertical scroll bar displays to the right of the list.
- You can change the width of any column. Position your mouse pointer on the divider line to the right of the column header you want to resize. When the mouse pointer changes to a two-headed arrow, drag the divider line to the left or right. The width of a column cannot be smaller than the heading name.
- An ellipsis (…) is used at the end of an entry to signify you are seeing incomplete information. When you hover over a field that has an ellipsis, the complete information displays. The information displays for a few seconds or until you move off of the field. This is a quick way to view the complete information without resizing the column.
- To reorder columns, click a heading name and drag it to the desired location.

Customizing the Listing Screen

All listing screens have a default view. However, you can customize the list to display the columns you want to see in the order you want to see them. If user names are required to enter the program, each user's customized view is saved.

To change settings, click **Customize View**. Use the options described below to make changes. To return to the default settings, in the Customize Listing Screen dialog box, click **Default Values**.

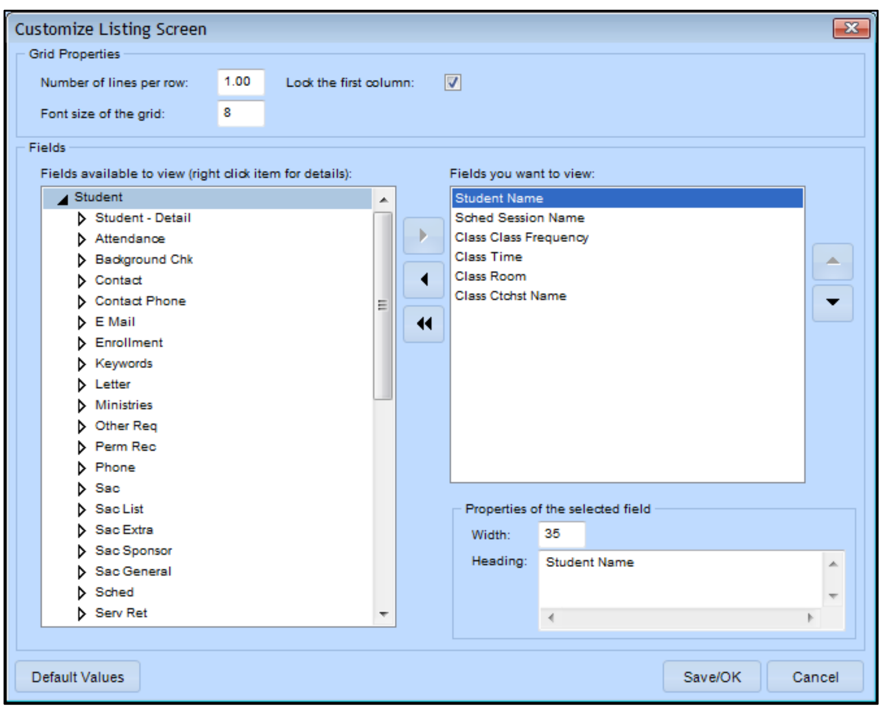

Fig. 13-2.

Grid Properties

- **Number of lines per row** — Increase this number to enlarge the height of each row in the grid. As you increase the number of lines in each row, you decrease the number of rows that are visible at one time. The default is **1.00**.
- **Font size of the grid** — To use a larger font, increase the number. To make the font smaller, decrease the number. Increasing the size reduces the number of rows you see at one time. The default value is **8 pt**.
- **Lock the first column** — By default, this option is selected and the first column is locked. This keeps the column in sight when you scroll to the right of a list. To unlock the column, clear this option.

Fields

You can use the drag-and-drop method or use the arrow buttons to move selected fields between the two lists.

- **Fields available to view** — Contains the fields you can add in the listing grid. To add a field to display in the listing window, click a field name, then click the right arrow to move it to the **Fields you want to view** list.
- **Fields you want to view** — Contains the fields currently displayed in the listing grid. To display the width and heading name below the list, click the field. Column headings display in the listing grid in the same order they are displayed in this text box. To reorder the list, click the field name and drag-and-drop it to your preferred location in the list. Or, click the field name and use the up and down arrows to reorder the list. For more information, see the following topic of Quick Tips for Reordering a List.

Width — Displays the width of the selected item in the **Fields you want to view** list. The default value or the resized value for the field width displays. An ellipsis (…) is used at the end of an entry in the grid to signify you are seeing incomplete information.

Heading — Displays the column heading name. A column can never be sized smaller than its heading name. The smaller the columns, the more information you can see on the screen at one time. You can also drag-and-drop some headings to reorder the columns.

Quick Tips for Reordering a List

Fields you want to view — The defaults in this list vary depending on the listing screen you are viewing. When you select an item in this list, its **Width** and **Heading** display below the list. The order of this list is the same order the columns display (from left to right) in the listing screen.

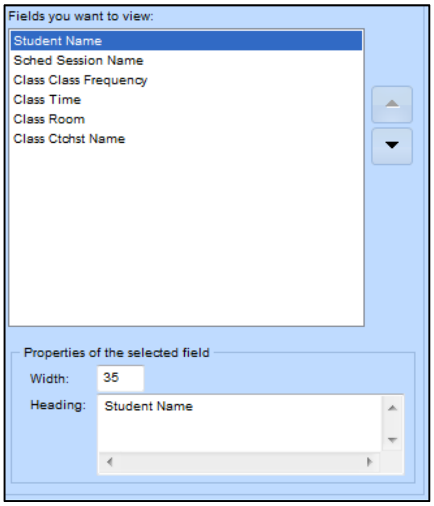

Fig. 13-3.

To reorder this list, click a field name, then drag it to the desired place in the list. You can also click a column heading in the listing screen and drag it to the desired place.

Another way to reorder the list is to select the field you want to move, then click  or  to move it up or down in the list.

In the listing screen, to print the list of items in the window, click **Print List**. If you want to reorder the list, in the Navigation tools, select an option in the **Order by** drop-down list. You can order different listing screens in different ways, depending on the type of information in the list.

About Easy Lists

Easy lists take the regular listing screens a step further. They make it easy to view and print information on 11 different topics, such as attendance, birthdays, ministries, talents, and sacraments. In the navigation pane of the Students window, click **Easy Lists**.

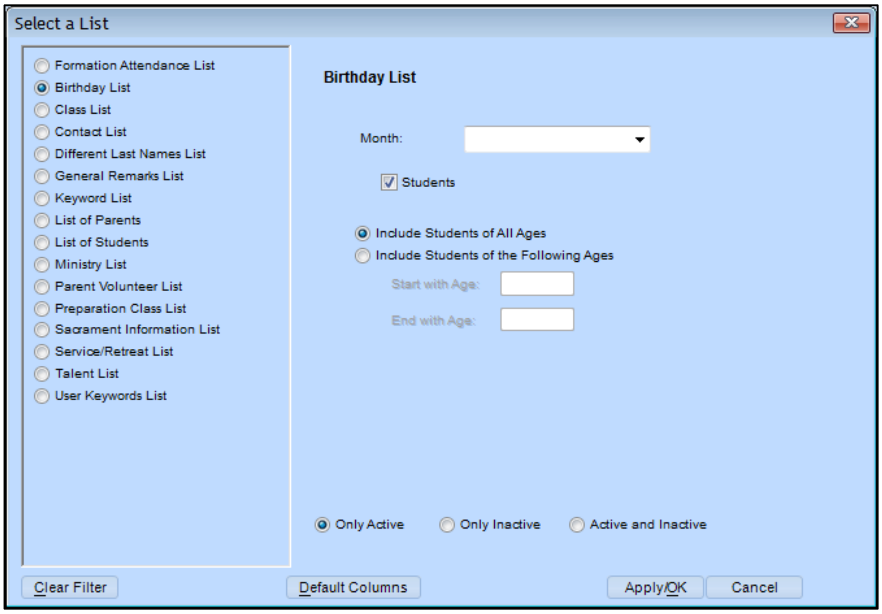

Fig. 13-4.

Select a List

Select the list you want to display. Options for the list display on the right. Options vary from list to list. After you make your selections, click **Apply/OK**. The Easy List window is now a listing screen. If you want to reset columns to the original view, click **Select a List**, then click **Default Columns**.

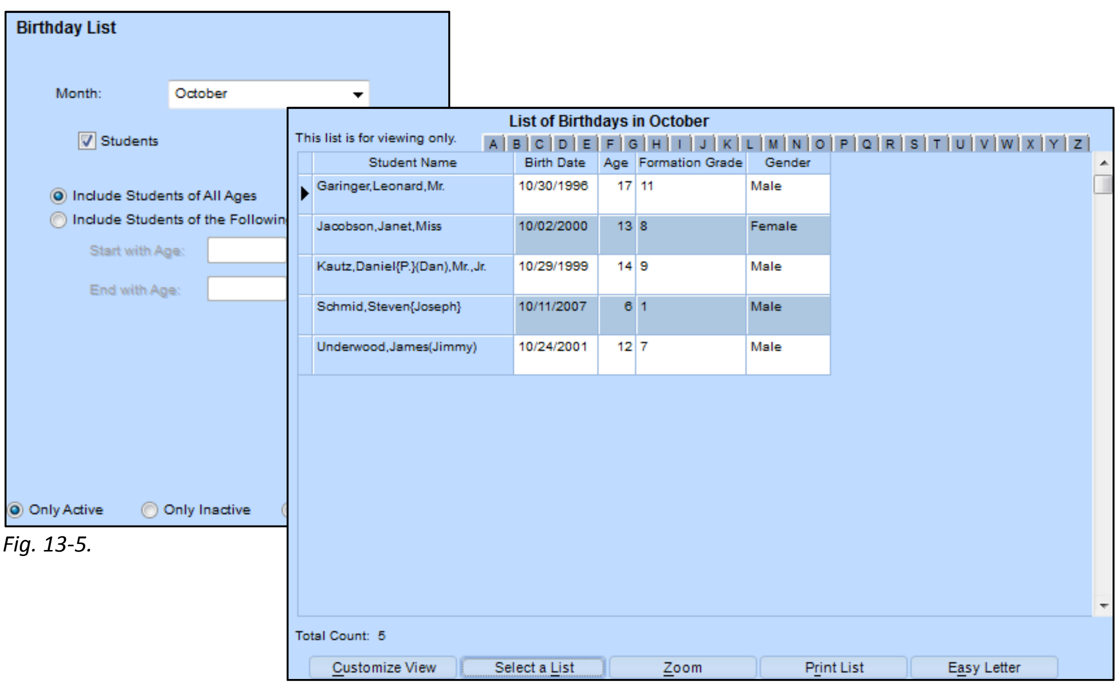

Fig. 13-5.

Customize View — Change columns, headings, widths, fonts, etc. For more information, see the Customizing the Listing Screen section of this chapter.

Select a List — Select different options for the current easy list or select a different easy list.

Zoom — Enlarge the list in a new window to view more lines and columns at once.

Print List — Print the list as it displays in the program.

Easy Letter — Create and print a letter to those in the list.

Exercises

Exercise #1

Get a list of children and young adults who have different last names than their parents. Customize the view to show their grade and address.

Exercise #2

Get a list of single female parents, between the ages of 25 and 50, with children. Send a letter to them regarding a new 'Mommy and Me' group.

Exercise #3

Get a list of students who are in the 1st Grade Formation class.

Exercise #4

Get a list of parents who have volunteered to be part of the car pool.

Questions

Answer these questions about viewing listings and Easy Lists.

Q: Which main which main program section includes financial fields as part of its listing screen's Customize View options?

A: ____

Q: The width of a column cannot be smaller than what? How could you make it smaller?

A: ____

Q: Which command button would you use to get the original columns back in an Easy List?

A: ____

14: CASS and EZ Mail

Having your addresses certified by CASS™ (Coding Accuracy Support System) qualifies your organization for reduced postal rates on your mailings. The U.S. Postal Service® uses standardized and correct mailing addresses from the National Address Database for large quantities of mail. PDS is authorized to provide CASS certification service to our program users.

The EZ-Mail™ features in the program help you prepare First-Class and Standard bulk mailings. To use EZ-Mail, you must first CASS-certify your addresses.

Checking Addresses for Common Errors Before CASS

Your addresses must meet the USPS regulations for your mailings to qualify for these postal discounts:

- **Carrier Route Rates** – Addresses must be matched with CASS-certified software that supplies eLOT at least 90 days in advance.
- **Bulk Mail** – Carrier route sorting must meet the reformed postal sorting requirements for eLOT. eLOT identifies the order in which a postal carrier can deliver the mail. The data required for eLOT is included in CASS It!.
- **Automation Rate Mailings** – Addresses must be matched using CASS-certified software at least six months before mailing.

Useful Information

To use the service, you must purchase a registration code and a monthly subscription by calling 800-892-5202.

For more information on this feature, visit http://www.parishdata.com/cass_it.

To check addresses for errors

1. On the File menu, click **Bulk Mail/CASS** > **Check Addresses for Common Errors**.
2. To begin, click **Next**.
3. Select an option for checking the addresses. If you want to select certain families, select the last option, and add conditions to filter the list.
4. Select to include only active, only inactive, or all families, and click **Next**.
5. If errors are found, the addresses that need to be corrected will display. Print the list to use as a reference when you make your corrections.
6. Click **Finish**.

Verifying Bulk Mailing Addresses Using CASS It! Certification

To verify bulk mailing addresses using CASS It!

> **Be Careful**
>
> This process alters data. We recommend backing up your data before proceeding.

1. On the File menu, click **Bulk Mail/CASS > CASS It! Certification**.
2. The CASS It! Process checks for available options, once verification is complete, click **Next**.
3. Select an option for checking the addresses. If you want to select certain families, select the last option, and add conditions to filter the list.
4. Select to include only active, only inactive, or all families, and click **Next**.
5. Select any additional options you want to perform. For more information on these options, see the Additional Field Information below.
6. Click **Begin CASS**.
7. If any addresses fail to be certified, they display in the summary. Print the list to use as a reference when you make your corrections.
8. Click **USPS Form 3553** to save or print the form with your information.
9. Click **Finish**.

Additional Field Information

NCOA - Optional - Extra Fees Apply — Update an address change to ensure that you're compliant with the USPS. If you want to report an NCOA change without changing the address in PDS, also select **Report NCOA Changes Instead of Making the Change**. NCOA processing is an add-on feature to CASS It and includes additional fees to your monthly subscription. For more information, contact a PDS solutions consultant at 1-800-892-5202.

Geocode Addresses - Optional — If you have Geocoding, select this to update the longitude and latitude to reflect the new address. Use this data with your choice of third-party mapping software. Geocoding is an add-on feature to CASS It and includes additional fees to your monthly subscription. For more information, contact a PDS solutions consultant at 1-800-892-5202.

Perform Zip+4 and Delivery Point Encoding — Update ZIP Codes with the additional four-digit suffix, and add the delivery point encoding.

Perform Street Address Standardization — Remove punctuation from addresses and shorten the direction indicators and street names.

Generate the Previous Certification File — If you don't want to run CASS It or NCOA processes, you can load the file that was created the last time you ran the process. You can then view a summary and print the forms.

Using EZ-Mail

EZ-Mail simplifies bulk mailing for you by properly sorting the mail and printing the forms required by the USPS. Refer to the tabs below for more information about each of the EZ-Mail steps, in order.

To use EZ-Mail

1. On the File menu, click **Bulk Mail/CASS** > **EZ-Mail**.
2. If there is a new set of postal forms, a dialog box displays. Click **Yes** to download them.
3. On each tab, enter or select the required information. See the following information for more details on the fields within these tabs.
4. When you're finished, click **Save/OK** > **Close**.

Potential Savings Using EZ-Mail

On this tab, you can estimate the potential cost of a mailing and your savings by using bulk mail. Enter the number of mailing pieces, and your costs are automatically calculated.

Step 1 - Mailing Specifications

This tab is the starting point for each mailing. Once you complete the information in this window, you don't need to edit it unless the next mailing contains different specifications or a date change.

Additional Field Information

ZIP code of the post office receiving the bulk mailing — Enter the ZIP Code of the post office that handles your mailing, typically the office where you obtained your mailing permit. It could also be a Sectional Center Facility or a Bulk Mail Center that serves your post office. Only make changes to the city if your post office requests that you print a different city on the tray labels.

Date of the Mailing — Enter the date you plan to send the mailing. This date prints on all forms and helps track the date of the last CASS certification.

Merge SCF into One Tray — Postal regulations suggest separating mail trays for each SCF even if there's only one mail piece per tray.

Number of Mail Pieces That Fit in a 2-Inch Package — Place a rubber band around a 2-inch stack of mailing envelopes, and count the number of envelopes.

Weight of a Single Piece — The weight of a single piece is difficult to determine unless you have special weighing equipment that can measure in fractions of ounces, up to three decimal places. If you don't have the equipment, you can estimate by weighing ten pieces and dividing the total weight by ten. We recommend that you ask your local post office to weigh samples of various types of mailings.

Postage Already on Each Piece — If you use a postage meter or precanceled stamps, enter the amount of postage that's on each piece of mail.

Step 2 - Build the EZ-Mail List

Before you print labels, envelopes, or letters, the program builds a list of families or individuals sorted in the order required by the post office. To use this list when you run a report, select to sort your report in EZ-Mail order.

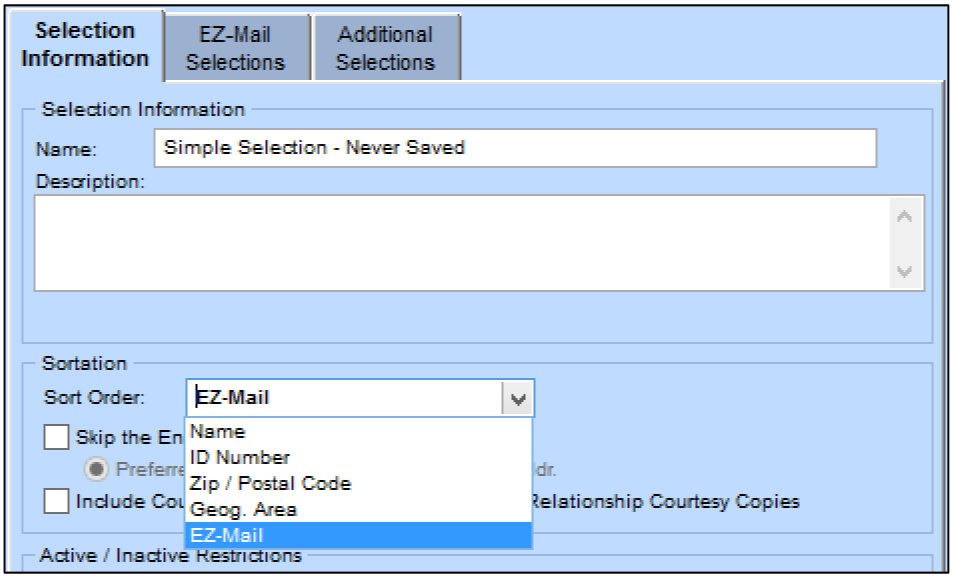

Fig. 14-1.

To build the special mailing list, indicate if the mailing will be sent to families, families based on financial selections, students, catechists, or parents/guardians.

Important Note

This step does not produce labels or envelopes; it just identifies who you want to include in the EZ-Mail list.

Additional Field Information

Build a List of Family Addresses — You can select names and addresses entered in the Families window.

Build a List of Family Addresses Based on Financial Selections — You can select names and addresses entered in the Families window.

Build a List of Student Addresses — You can select names from the Students window and addresses entered in the Family window.

Build a List of Catechist Addresses — You can select names and addresses from the Catechists window.

Build a List of Parent/Guardian Addresses — You can select names from the Parents & Guardians window and addresses entered in the Families window.

Step 3 - Print the Qualification Report

This document satisfies the post office requirement for standardized documentation. Present this report to the post office with your mailing.

The report contains the following information:

- **EZ-Mail List** — Lists each tray by number and gives specific information about the tray and pieces of mail.
- **Tray Number** — Identifies one of the trays used in this mailing. Tray numbers begin at 1 and are numbered sequentially. There is also a tray 0 for any uncertified pieces in the mailing, which must be sent at the First-class rate.
- **Tray Size**— Indicates the size of the tray required by this group of mailing pieces. Trays can be 1 foot long or 2 feet long.
- **Tray LVL**— Identifies the type of mail to place in each tray.
- **Tray Zip**— Identifies the ZIP Code common to all pieces in the tray. This can be a partial ZIP Code if the tray sorts by the first three digits.
- **Group Dest**— Lists all the individual carrier routes and ZIP Codes if there are multiple routes and ZIP Codes in a tray.
- **Rates** — Total number of pieces in each tray that print under the appropriate Rate column.
- **Running Total** — The last column in the report that displays a running total of pieces in the trays.
- **Totals** — Displays the total number of pieces in each Rate column and then a grand total of all pieces in the Running Total column.
- **Auto Rate Summary** — Displays the total number of pieces for each Rate category in your mailing and the total number of pieces in the mailing.
- **ECR Rate Summary**— If you use carrier route trays, these trays are treated by the post office as a separate mailing. This is a summary of the total number of pieces for that mailing.

Step 4 - Print the Tray Labels

Mail trays used for mail in the same area of distribution are labeled with a special barcode. We recommend printing them with a laser or ink jet printer.

Labels must be 2 inches high by 3.5 inches wide. The labels must be placed on the correct trays to speed up the mail sorting process.

Step 5: Print the Postage Statement

Enter information here to complete the proper form required by the post office for your mailing. The form you file depends on the class of mail you send and the permit you use.

Additional Field Information

Sequencing Date — Projected date of the mailing.

Permit Holder — The permit holder's information and the CAPS Customer Reference ID number.

Print the Postage Statement – Prints your statement. Before you print, make sure the information on the rest of the tab is correct.

Step 6 - How to Print the Mailing

This tab explains that you need to use the program's Reports feature to print your labels, envelopes, letters, and lists.

To print your bulk mailing

1. Click **Close** to exit the EZ-Mail process.
2. On the ribbon, click **Reports**.
3. Locate the report relevant to the mailing list you selected in **Step 2: Build the EZ Mail List**.
4. Select the printer.
5. Set the layout.
6. In the Sort Order drop-down list, select **EZ-Mail**.

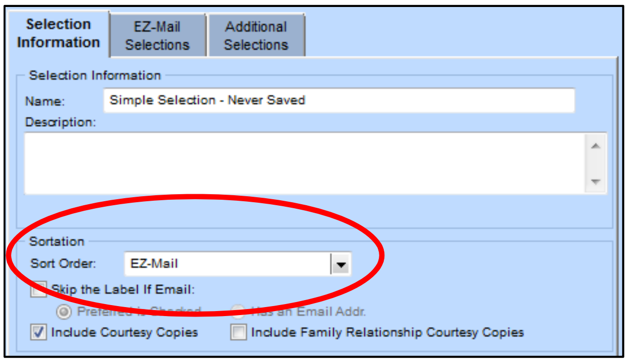

Fig. 14-2.

> **Important Note**
>
> Under **Sortation**, in the **Sort Order** drop-down list, you must select **EZ-Mail**. The mailings are printed in sorted order beginning with the pieces that do not qualify for bulk mail rates. Then, if needed, you can make selections that limits who receives the mailing.

7. On the **EZ-Mail Selections** tab, enter any additional selections you want. In the example below, it will print labels beginning with the 17th piece in the 2nd tray, and end with the 10th piece in the 8th tray. This is useful if your print sequence is interrupted and you need to begin printing at a specific point.

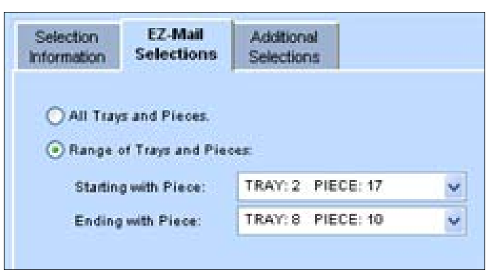

Fig. 14-3.

Step 7: Packaging, Traying, and Mailing

This is not a step performed by the EZ-Mail program. You must organize the necessary elements before taking the mail to the post office.

Before you actually print, make sure you have everything required for the mailing. For example, you could print the complete mailing and realize you do not have the correct permit, or you could be in the middle of the mailing and run out of labels. Make sure you have the following:

- Necessary permits
- CASS-certified data
- Trays
- Tray labels
- Address labels (if used on envelopes)
- Envelopes (if printing directly on envelopes)

All of these items are important in order for you to complete your bulk mailing. Your local post office can provide you with rubber bands and trays free of charge. Tray labels are produced by the EZ-Mail program. If you are going to affix address labels to each mailing piece, make sure you have an adequate supply of labels on hand that conform to postal regulations.

Useful Information

Your printer is also an important component of this process. If the quality of the printed barcode is not clear enough for the postal barcode sorters to read, your mailing could be rejected. Check with the post office about testing the barcodes your printer produces.

Up to this point, the EZ-Mail program has done its job and prepared an ordered list of mail pieces which await further attention. It is important during the packaging and traying process that this order is not altered. For example, you may separate a stack of labels so volunteers can help put labels on envelopes. If the stacks get out of order, your mailing could be rejected. So, it is important to make sure that the mailing pieces are kept in the order they were printed.

Since each segment of the mailing is identified, it is very easy to package and tray the entire mailing. The program prints a label or page between the groups for each tray.

Below are some suggested steps you can use to complete the packaging and traying process:

1. **Put the tray labels on the proper tray** — One tray label prints for each tray that your mailing requires. Each label identifies which size of tray it should be placed on. A tray number further identifies each tray label.
2. **Order trays by number** — Once all of the labels are placed on trays of the proper size, place the trays in numerical order by the tray number. You are now ready to begin filling the trays.
3. **Separate mailing by tray** — Look for the tray identification label or page that separates mail for each tray. Place all labels that print before this label in tray 1, and place those that print after this label up to the next separator in tray 2, etc. Trays can be 1 foot or 2 feet long. "One-foot" trays are actually 10.25 inches, and "two-foot" trays are 21 inches. The post office considers a tray to be full if it is three-quarters full when tilted at a 45 degree angle. Each tray must have a label on it.
4. **Stuff envelopes/affix labels** — Put the labels on the envelopes in the order printed, or put the addressed letters in envelopes in the order printed, then put them into the proper trays. If you are printing package and endorsement fields, the tray and piece numbers print on the label, envelope, or letter. The tray number indicates which tray you should put the piece in. The piece number indicates the order of the piece within the tray.

   Useful Information

   Labels that do not print a tray or piece number are regular mail pieces, which do not qualify for bulk mailing. Do not put them in any of the trays. Keep them separate from your bulk mailing. To mail these pieces, you must put full postage on them and send them via regular mail.

5. **Verify labels are straight, not skewed** — Make sure you place labels on the envelopes properly. If they are on an angle, the scanner may not be able to read them, and they could be rejected.
6. **Get forms ready** — Gather together all of the postal forms that are required for your mailing, and make sure all information is completely filled out.
7. **Deliver the mailing** — Take the trays and the forms to the post office.

Post Office Information

You can set up or modify postal rates and specifications on this tab. Default values are provided. However, if the postal system changes the values, you must update these values.

Useful Information

The PDS program updates modify this information as the post office adjusts rates. You only need to modify them manually if you produce a bulk mailing after the new rates take effect but before the next scheduled program update from PDS.

Additional Field Information

Mailing Size — The minimum number of pieces that qualify for a discount rate under the mailing class displayed.

Carrier Route Group — To qualify for a discount rate for carrier route sort, 10 or more pieces must be bundled together in each carrier route group or bundle.

5-Digit Tray — A minimum of 150 pieces constitutes a full tray of 5-digit presorted mailing pieces.

3-Digit Tray — Contains envelopes that aren't 5-digit sorted. Enter the number of pieces remaining to make a full tray of 3-digit/scheme presorted mailing pieces.

AADC Tray — The minimum number of pieces that constitute a full tray of AADC mailing pieces.

Rates — Displays the rates for each piece of mail for First-class, Standard-class, Carrier Route, 5-digit, 3-digit, and AADC mail.

Rates for Carrier Route — The rate for a single piece of Carrier Route sorted mail.

Address Change Notification

For presorted First-class mail, the post office requires that the addresses you use are correct through CASS certification, and that the person you address the mailing to resides at that address. The United States Postal Service® offers, for a fee, the Address Change Service (ACS). As a participant, you're notified if an addressee moves, and the new address is sent to you.

To use the service, you must obtain a participation code and print the phrases "Address Service Requested" or "Change Service Requested" on mailings. For other requirements and details of participation, visit https://www.usps.com/business/move-update.htm..

Useful Information

When using the Address Change Service, you must manually update your existing data in PDS. If you manually change an individual's address information, the address is no longer considered CASS–certified, so you must have your addresses CASS-certified again.

Exercises

Exercise #1 — In step 1 of the EZ-Mail feature, enter the following mailing specifications:

- **ZIP Code of the post office receiving the bulk mailing** — Enter the ZIP Code of your post office. If you are unsure of your post office's ZIP Code, enter yours.
- **Mailing Class** — Standard-class - Non Profit
- **Your Permit Number for this Class** — 1234
- **Date of the Mailing** — 1 week from today
- **Try to Use Carrier Route Trays** — Yes
- **Merge SCF into One Tray** — Yes
- **Number of Mail Pieces That Fit in a 2-inch Package** — 60
- **Weight of a Single Piece** — 0.401
- **Postage Payment Method** — Permit Imprint
- **Postage Already on Each Piece** — $0.00
- **Type of Discount** — DSCF

Exercise #2 — Build an EZ-Mail list of student addresses. Then, in the Select Report window, under **Label/Envelope Reports in Upper Case**, run the **Student Mailing Label - Barcode at Bottom** report. Make sure you change the sort order to **EZ-Mail**.

15: Additional Features

This chapter discusses features that are common to all of the PDS programs.

Using the Keyboard

Navigation

The ribbon provides a standard method to navigate the program using the keyboard. Press and release the **Alt** key on the keyboard. A series of keyboard navigation hints display. Press the letter corresponding to the window you want to view, such as **R** for Reports (shown below).

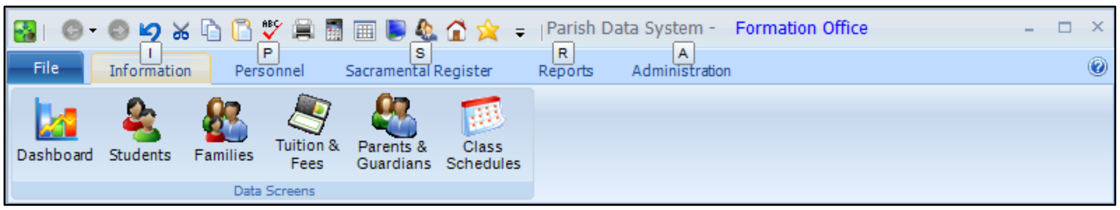

Fig. 15-1.

A second set of keyboard navigation hints display for the selected page. Press the letter corresponding to the item you want to view. Use the arrow keys to navigate the drop-down lists and menu items. Press **Enter** to select a highlighted menu item.

Keyboard Shortcuts

You can use shortcut keys to quickly navigate through your PDS program. You can perform actions in the program using the following key combinations.

Key Combinations	Action
Ctrl + C	Copies selected text.
Ctrl + K	Opens the calculator.
Ctrl + P	Prints the current window.
Ctrl + V	Pastes copied or cut text.
Ctrl + X	Cuts selected text.
Ctrl + Y	Opens the Year at a Glance calendar.
Ctrl + Z	Undo the last edit.
Alt + down arrow	Opens a drop-down list.
Alt + F4	Closes the active window.
Alt + N	Move to the next record.
Alt + P	Move to the previous record.
Alt + Q	Displays the Quick Lookup dialog box.
Alt + S	Saves the edits and selections.

You can navigate the program using the following keyboard shortcuts.

Navigation Keys	Moves Insertion Point	Ctrl + Key Moves
Left arrow	Left one character or unit	Left one word or larger unit
Right arrow	Right one character or unit	Right one word or larger unit
Up arrow	Up one line or unit	Up one larger unit
Down arrow	Down one line or unit	Down one larger unit
Home	Beginning of line	Beginning of data
End	End of line	End of data
Tab	Next field	---
Shift + Tab	Reverse tab order	---
PgUp	Up one window at a time	---
PgDn	Down one window at a time	---

In any full date field (mm/dd/yyyy), you can use the following key commands.

Key Command	Action
T	Inserts today's date
- (dash) or _ (underscore)	Go back one day
+ (plus) or = (equal sign)	Go forward one day

Quick Access Toolbar

The Quick Access toolbar contains buttons for some common tasks and features. To view a button description, place your cursor over the button. By default, all available buttons display, but you can hide any or all of them. To display or hide quick access buttons, click and make your selections.

Fig. 15-2.

Back & Forward

When you open Formation Office, the program keeps a record of the different windows you visited, up until you exit the program.

These navigation buttons allow you to move either back one window at a time, forward one window at a time, or you can use the **Back** drop-down list to easily revisit a previously viewed window.

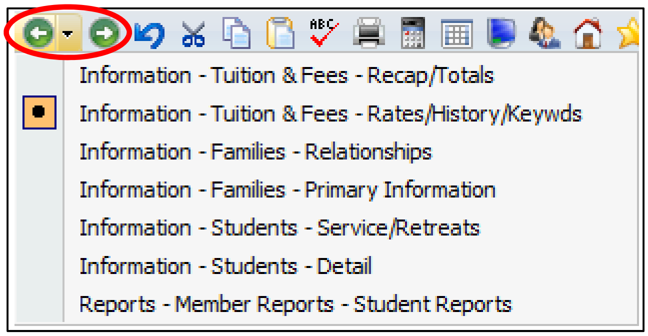

Fig. 15-3.

Undo, Cut, Copy, & Paste

The Quick Access toolbar includes dedicated shortcuts for the most common editing commands. You can:

- Click the Undo icon or press **Ctrl + Z**
- Click the Cut icon or press **Ctrl + X**
- Click the Copy icon or press **Ctrl + C**
- Click the Paste icon or press **Ctrl + V**.

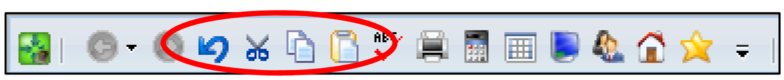

Fig. 15-4.

Spell Check

To double-check the spelling, use the integrated Spell Check feature. Place the cursor inside the item you want to check, then click the Spell Check icon in the Quick Access toolbar.

Fig. 15-5.

Insert Symbol

You may need to insert characters from languages other than English. Right-click any text field, select **Insert Symbol**, then select the special character.

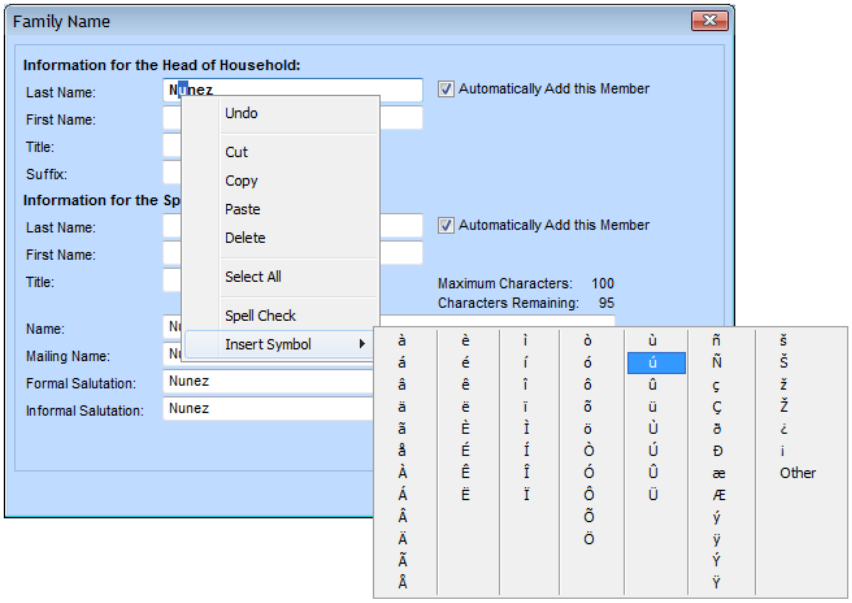

Fig. 15-6.

Special Tools You Can Use Anywhere

These items can be used from almost any location in the program.

Print Screen

On the Quick Access toolbar, click the Print icon or press **Ctrl + P**.

Fig. 15-7.

Select the printer, paper size, orientation, and margin style. Then click **Print**.

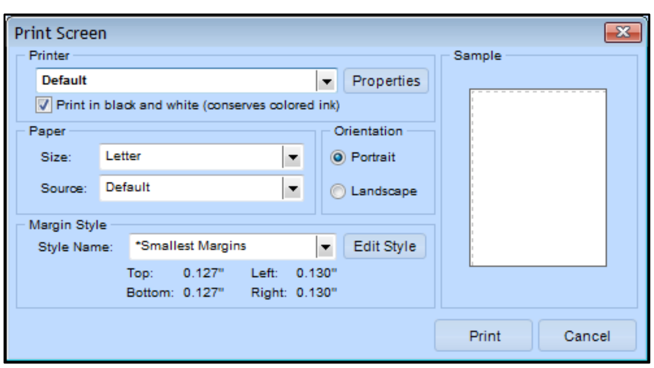

Fig. 15-8.

The settings in this dialog box are saved with each user and recalled the next time a Print Screen is requested.

Printer — Displays the list of available printers installed in your Windows® operating system. To add or remove a printer, refer to your Microsoft® Windows® Help or your printer manual for instructions. Click **Properties** to view the controls for items such as the number of copies and print quality. These items are specific to the printer.

Paper — Select the **Size** and **Source**. These options depend on the capabilities of the selected printer.

Orientation — Select how the image should print on the page. If the printer selected is not capable of printing in Landscape mode (horizontally), it does not display as an option. The sample on the right of the dialog box displays the orientation selection.

Margin Style - Style Name (40 char) — Set the margins for the page. To use the lowest settings available for the selected printer, select **Smallest Margins**. The margin dimensions display under the selected style. The size takes into account the printable area the selected printer is capable of printing. To insert a new style or modify or delete an existing style, click **Edit Style**.

Calculator

On the Quick Access toolbar, click the Calculator icon or press **Ctrl + K**.

Fig. 15-9.

You can use this feature to total amounts without going to your desktop calculator. You can also use it as a means to insert a total from the tape into any **Amount** field. It also provides an easy way to enter numbers with the mouse. You can also click the calculator icon that displays after you click in an **Amount** field.

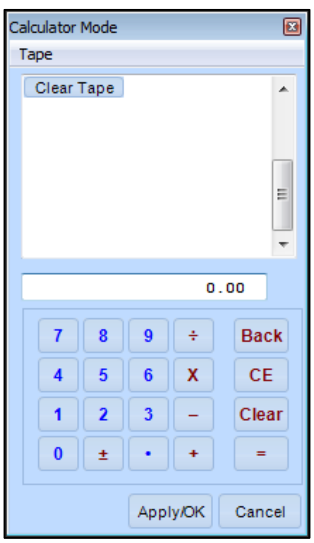

Fig. 15-10.

Click an amount field to display the calculator icon. Click the calculator icon, then click numbers and function buttons to “key” them in. You can also use the keyboard to enter amounts. Click **Apply/OK** or **Enter** to place the total in an **Amount** field. Click **Cancel** to close the calculator.

Click **Tape** to use the following options:

- **Visible** — Switch between displaying and not displaying the tape.

- **Clear** — Erase all calculations and commands. You can also click **Clear Tape**, which is visible when the tape is visible.
- **Print** — Print a report of what is on the tape.
- **Copy to the Clipboard** — Send what is on the tape to the clipboard.

Calendar

To view a year-at-a-glance calendar, on the Quick Access toolbar, click the Calendar icon or press **Ctrl + Y**.

Fig. 15-11.

This is similar to the calendar icon that displays when you click in a date field, but it is not associated with any field in the program. The year-at-a-glance calendar displays in a new window. Below is a sample calendar.

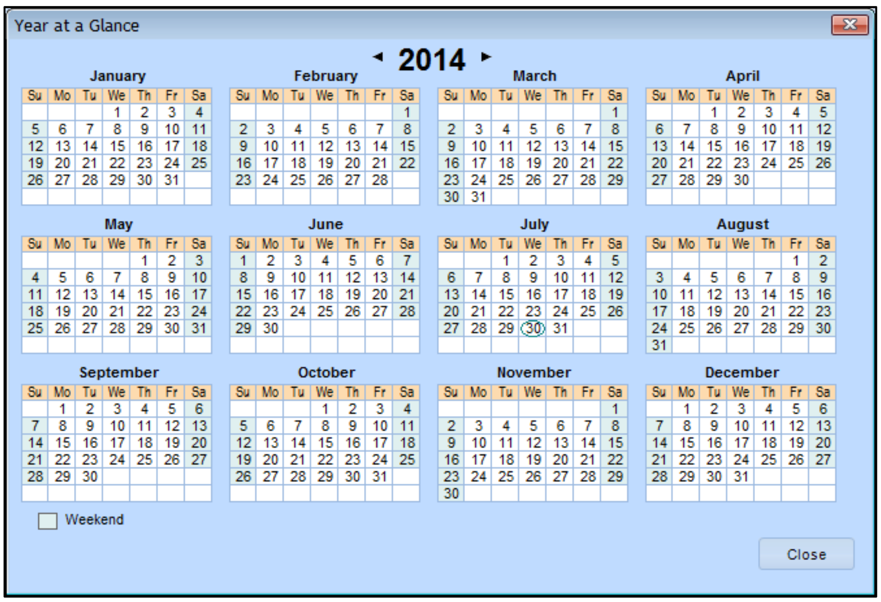

Fig. 15-12.

- Weekends are shaded light green.
- Navigation arrows are on each side of the year. Click ► to view next year's calendar, or click ◄ to view the previous year. Each click moves ahead or back one year.
- Click **Close** to exit the calendar.

Useful Information

Click the calendar icon when in a date field, then double-click the date you want to insert in the date field.

Program Information

Screen Information

In the Screen Information dialog box, you can adjust the settings for screen colors and resolution. On the Quick Access toolbar, click the Screen Configuration icon.

Fig. 15-13.

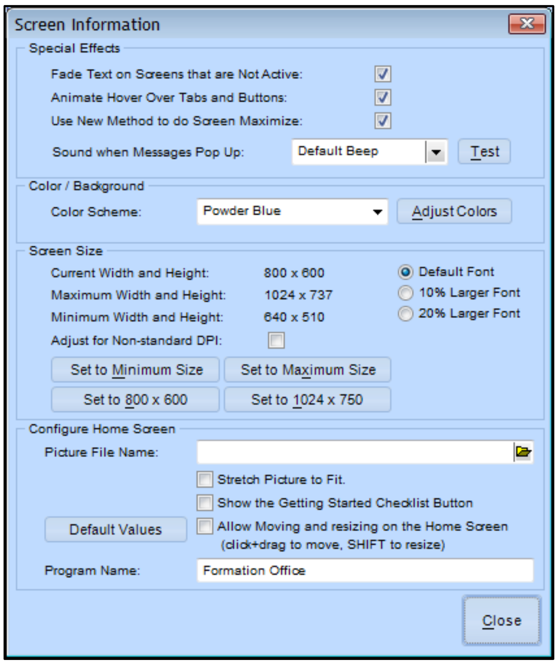

Fig. 15-14.

Special Effects

- **Fade Text on Screens that are Not Active** — When selected, inactive windows located behind active windows appear faded.
- **Animate Hover Over Tabs and Buttons** — When selected, if you hover over a tab or button, a description displays.
- **Use New Method to do Screen Maximize** — If you are an OnDemand user, select this option to maximize your screen and still view OnDemand messages.
- **Sound When Messages Pop Up** — Pop-up messages display for specific activities such as entering a duplicate ID, selecting the **Inactive** check box, or displaying error messages. To select a sound, click the **Sound when Messages Pop Up** drop-down list, and select an option. To preview the sound, click **Test**.

Color/Background

You can select one of the preexisting color schemes from the **Color Scheme** drop-down list, or you can create your own.

> **Useful Information**
>
> Select the **Few Colors** color scheme if your computer has 256 colors available.

To set up your own color scheme

1. In the Screen Information dialog box, click **Adjust Colors**.
2. In the Color Adjustment dialog box, click **Add New Color Scheme**.
3. In the left pane of the window, you can change the colors for various parts of your program windows. A preview of your changes displays in the right pane.
4. When you're finished, click **Save/OK** to apply your new color scheme.

Screen Size

Set the screen size depending on your Windows screen resolution settings.

- **Adjust for Non-standard DPI** — Adjusts the height of the program to make the windows fit on your screen. For this change to take effect, you must exit and restart the program.

  > **Useful Information**
  >
  > Select this option if you're having trouble viewing the entire program on your monitor.

- **Set to Minimum Size** — Reduces the screen resolution to 640 x 510, or the minimum size your monitor allows.
- **Set to Maximum Size** — Enlarges the screen resolution to the maximum size your monitor allows.
- **Set to 800 x 600** — Sets the program window size to 800 pixels by 600 pixels, suitable for many smaller monitors.
- **Set to 1024 x 750** — Sets the program window size to 1024 pixels by 750 pixels, suitable for many larger monitors.
- **Default/10% Larger/20% Larger Font** — Sets the size of the text used in windows throughout the program. Select larger fonts for easier readability.

Configure the Home Screen

The Home window displays each time you start the program. From here, you can use the ribbon, tabs, navigation panes, and Quick Access toolbar to navigate through the program.

From any program window, you can access the Home window by clicking on the Quick Access toolbar.

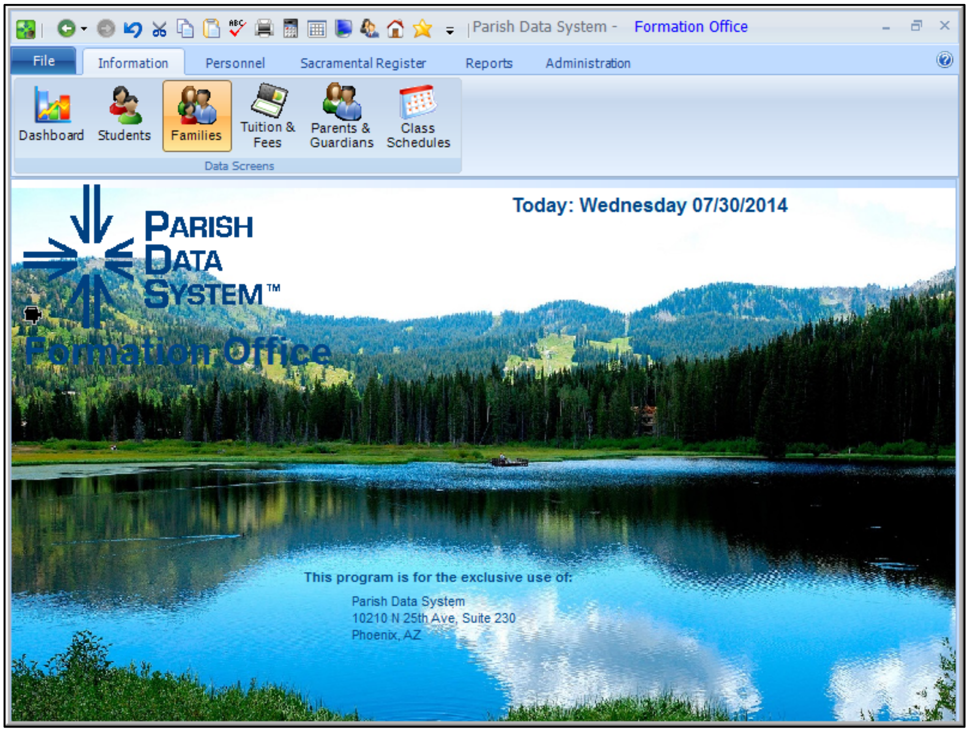

Fig. 15-15.

You can customize your Home window by:

- Adding a photo background
- Displaying or hiding the Getting Started Checklist button
- Moving and resizing items in the window
- Change the Name of the Program. For example, instead of "PDS Formation Office," you can display "Parish Management" or "Mary's Formation Office."

To customize your Home window

1. On the Quick Access toolbar, click . The Screen Information dialog box displays.
2. Under the Configure Home Screen section, make your selections.

> **Useful Information**
>
> You may want to change the program name to customize your program or to indicate which organization you are working with if you have multiple locations.

3. Click **Save/OK**.

General Information

The dashboard is a customizable, statistics-at-a-glance feature that lets you readily track the data that most interests you.

On the **Information** tab, click **Dashboard**. The General Information section always displays in the upper left corner of this window. This data is continually updated. The dates in the General Information section update when you first run the program or when you run a fix or backup.

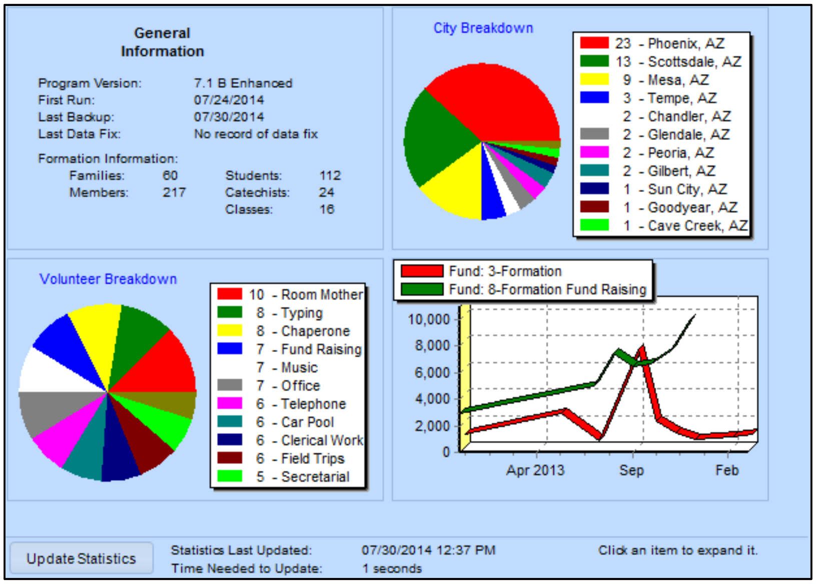

Fig. 15-16.

View Log of User Activity

The User Log records the date, time, and user name associated with activities performed or entries made in the program. To view the User Log, on the Administration tab, click **View User Log**.

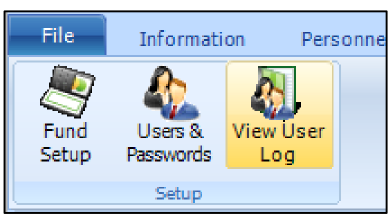

Fig. 15-17.

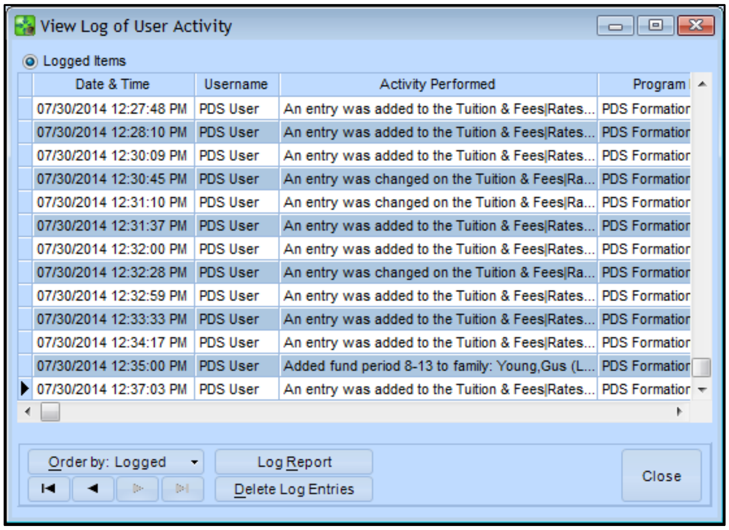

Fig. 15-18.

Each entry displays the following:

- The **Date & Time** of the activity.
- The **User Name** associated with who performed the activity. If user names are not required to use the program, "PDS User" displays here.
- The **Activity Performed** and if it was completed or cancelled.
- The **Program Name** and **Sub-Group** columns are helpful in situations where you have multiple programs connected to the same database. Depending on your resolution, you may have to scroll to the right to view these columns.

To select a viewing order, click **Order by**. By default, **Logged** is selected. This is the order that users enter the program. It is different from **Date & Time** if you are on a network and clock settings on all computers do not match. You can also order by **Date & Time**, **User Name**, and **Activity Performed**.

On the Initial Setup dialog box (found on the **File** menu under **Setup**), there is an option to **Ask for Reason of Significant Changes**. If this option is selected, when you make a change, the program keeps a log of those important changes.

With this option enabled on the View User Log of Activity dialog box, you can filter the list to:

- View all Logged Items
- View only Changed Items
- View only Deleted Items

To print the entire log, click **Log Report**. The report will be sorted by the **Order by** selection and print items based on your filtered selection.

List of Users Currently in Program

The List of Users Currently in Program displays who is in the program. This list is helpful if you are attempting to run a process such as a backup that requires other users to exit the program. Names are recorded only if they are required when entering the program. To access this list, on the Quick Access toolbar, click the Who is Running icon.

Fig. 15-19.

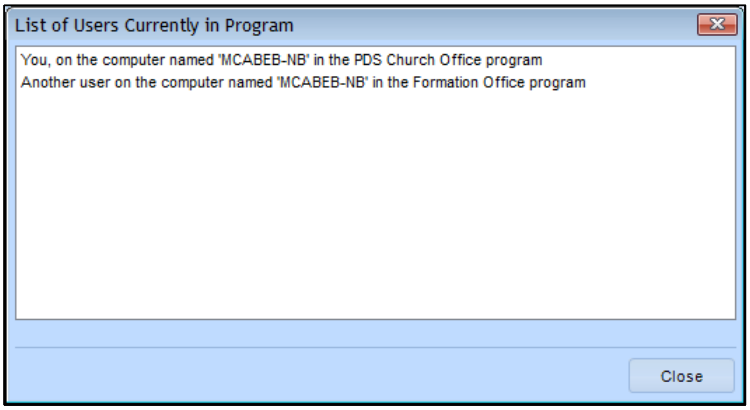

Fig. 15-20.

Favorites

Access a list of your favorite locations in the program. On the Quick Access toolbar, click the Favorites icon. Click **Add Favorite** to add the current program location to your list of favorite places. Click any entry to jump straight to the specified window. If you have set up users and passwords, the program maintains a separate list of favorite locations for each user.

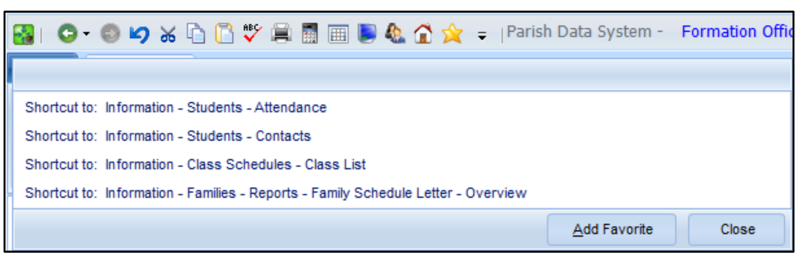

Fig. 15-21.

Within the Favorites list, you can right-click favorite items to organize this list:

- **Delete This Item** – Remove the selected item from the list.
- **Move This Item Up** – Move the selected item up in the list.
- **Move This Item Down** – Move the selected item down in the list.
- **Rename This Item** – Rename the selected item from the list.

Help

Display the online Help for the program. There are several ways to access Help:

- On the far right of the ribbon, click the Help icon .
- On the File menu, click **User Guide > User Guide**.
- On any data window, press the F1 key on your keyboard to access information about that section of the User Guide.

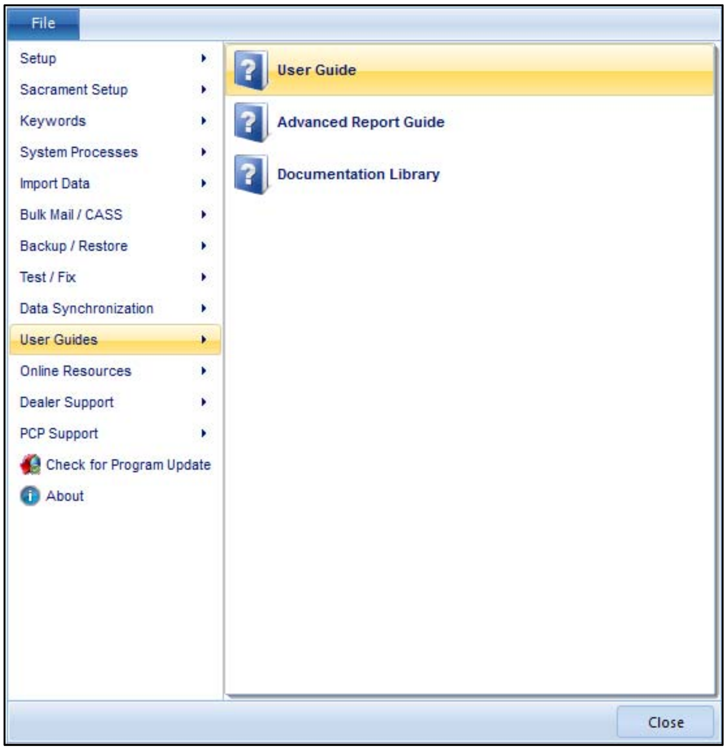

Fig. 15-22.

Users & Passwords

Requiring a user name or both a user name and password to access the program is an optional feature. **However, we strongly recommend you use this feature**.

If the program is not set up to ask for a name or a name and password, anyone can enter the program, look at your data, and make changes to it.

There are several key advantages of requiring user names:

- Restricting who can enter your program.
- Logging the user name with the processes performed so you can determine which changes each user made.
- Each user can define preferences for entering names in the program.
- The administrator to see who is currently using the program. To access this list, click on the toolbar.

Requiring passwords along with user names:

- Further restricts who can access your program data. A user name may not provide enough security to prevent someone from entering the program.
- Allows you to set which users have access to perform specific processes.

On the Administration tab, click **Users & Passwords**.

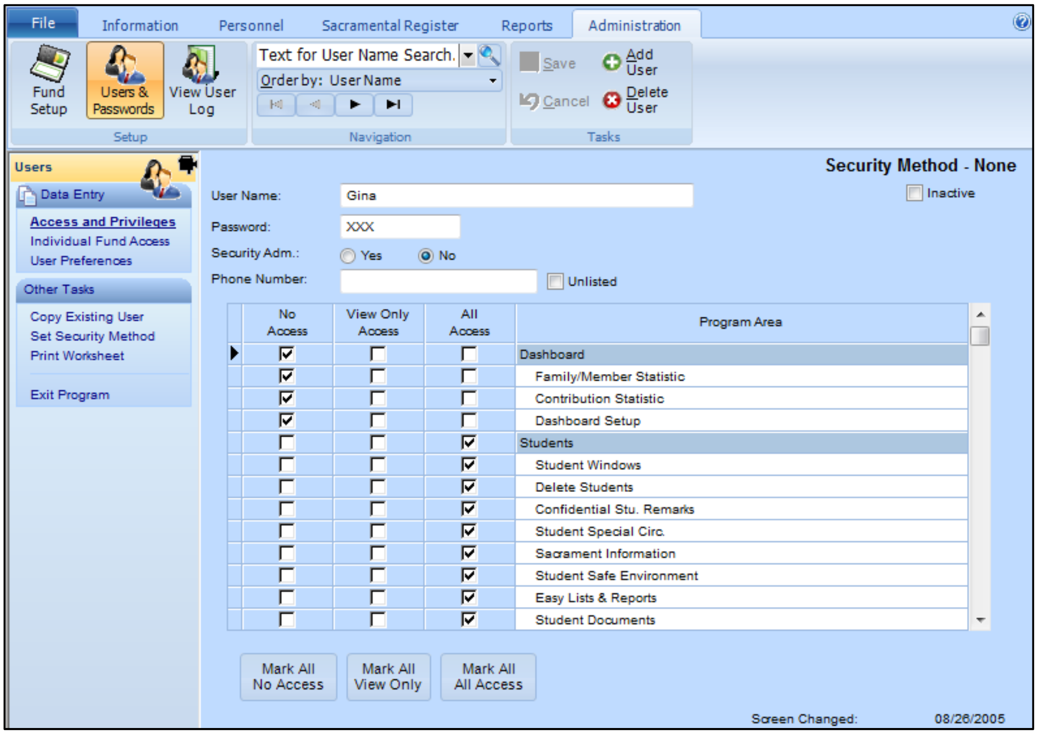

Fig. 15-23.

Adding a User

To create a new user, click **Add User**. Enter information about the user as described below.

User Name — Enter the name of the user. This is what they will type when entering the program. This does not have to be the user's full name or real name. For example, Suzanne might want her user name to be "Susie Q" or "Sue". The user name is not case-sensitive.

Password — If you require users to have a password to enter the program, enter it here. The program never displays the real password, but displays X's instead. Passwords are case-sensitive.

Security Adm — At least one person must be a security administrator. This person must have all access to all parts of the program, including the User/Password information. This person is responsible for creating and maintaining all user accounts and changing or resetting other users' forgotten passwords. For this reason, you should also have a second or backup administrator.

Phone Number — Enter a telephone number where this user can be reached outside of the office. Select **Unlisted** if this number should not be shared with others.

Copying Existing Users

If you have several users with similar roles, you can use the **Copy Existing User** command in the navigation pane. Select the user with the most similar role, and click **Copy User**. This creates a "Copy of <User Name>" record for you to rename. The Access and Privileges settings are initially the same as the selected user, but can be modified without affecting the original record.

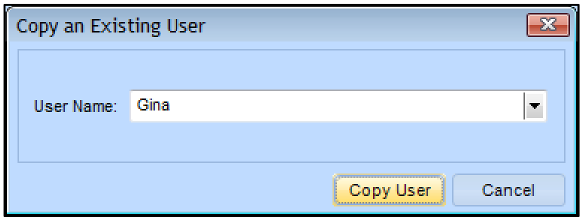

Fig. 15-24.

About User Preferences

Each user can select a preferred method for entering names in the program. Remember, when set to **All Access** or **View Only Access**, a user can change their user preferences. Otherwise, the security administrator must set up and maintain each user's preferences.

Enter the name parts on separate lines — This is the default option when the program is installed. When you begin entering a name, this option automatically displays the name breakdown window so you can enter the parts of the name: **Last Name**, **First Name**, **Title**, and **Suffix**. As parts of a name are entered on separate lines, the name formats for the **Name**, **Mailing Name**, **Formal Salutation**, and **Informal Salutation** are built.

Enter entire name on a single line - automatically display dialog — When you begin entering a name, this option automatically displays the name breakdown window. In the **Name** field, enter the last name, first name, title, and suffix. As you enter the entire name on the single line, the **Mailing Name**, **Salutation**, and the parts of the name (**Last Name**, **First Name**, **Title**, and **Suffix**), are filled in automatically. You can edit the name fields at any time.

Enter entire name on a single line - do not automatically display dialog — This option does not automatically display the dialog box. Names are entered in the appropriate window. To verify the **Name**, **Mailing Name**, **Formal Salutation**, and **Informal Salutation** formats are correct, you must click after the **Name** field to go to the name breakdown window.

About Access and Privileges

In this window, indicate which parts of the program the user can access. There are three levels of access: **No Access**, **View Only Access**, and **All Access**.

Security administrators must have all access to at least the User Names section. Other users can have any combination of access that the security administrator sees fit.

You cannot have higher access to a detail category than you have to a general category. For example, you cannot have **All Access** to the Confidential Student Remarks option if you have **View Only** access to the Students section.

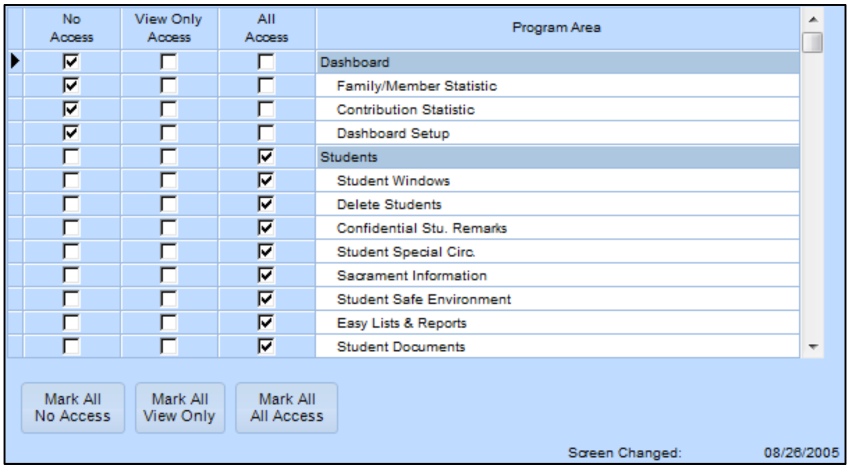

Fig. 15-25.

Individual Fund Access

In the navigation pane of the Users & Passwords window, click **Individual Fund Access** to set the user's access to funds. Security administrators should have all access to all funds.

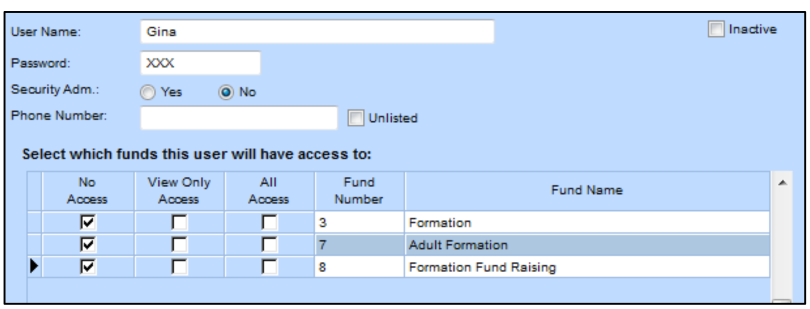

Fig. 15-26.

Selecting a Security Method

You can select the security method option you prefer. This is what users are asked for before entering the program. The first time you access the Users and Passwords window, you must select a security method. In the navigation pane, click **Set Security Method**, and select one of the following methods:

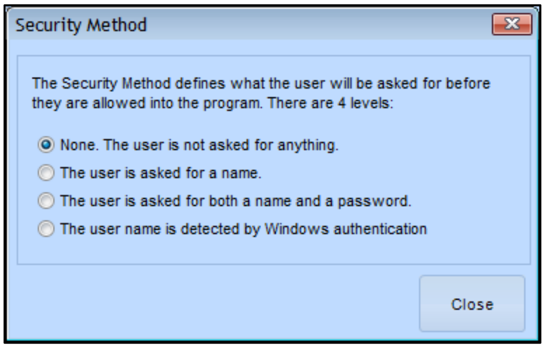

Fig. 15-27.

Useful Information

Changes to the security method do not take effect until you exit the program and restart it.

None. The user is not asked for anything — Users do not enter a user name or password to access the program.

The user is asked for a name — Users must enter a name but not a password. The name must be set up under Users & Passwords.

The user is asked for both a name and a password — Users must enter a name and a password. If the security method is set for both a name and password, then each user is required to have a user name set up under Users & Passwords.

The user name is detected by Windows authentication – The PDS user name must match that used to log in to Windows®. On startup, if an active PDS user name matches somebody who is logged into Windows®, then the user can access PDS without additional prompting.

Useful Information

Only select this option if your network is secure, you trust the Windows® login process, the computers are in reasonably secure locations, and you don't share passwords with others.

The user name is detected by OnDemand authentication – The PDS user name must match that used to log in to OnDemand. On startup, if an active PDS user name matches somebody who is logged into OnDemand, then the user can access PDS without additional prompting.

About Setup Options

There are additional configuration options that you should set up before using the program. Family and student ID numbers can be assigned manually, automatically, or left blank. Configuration options are located on the File menu, under **Setup > ID Number Options**.

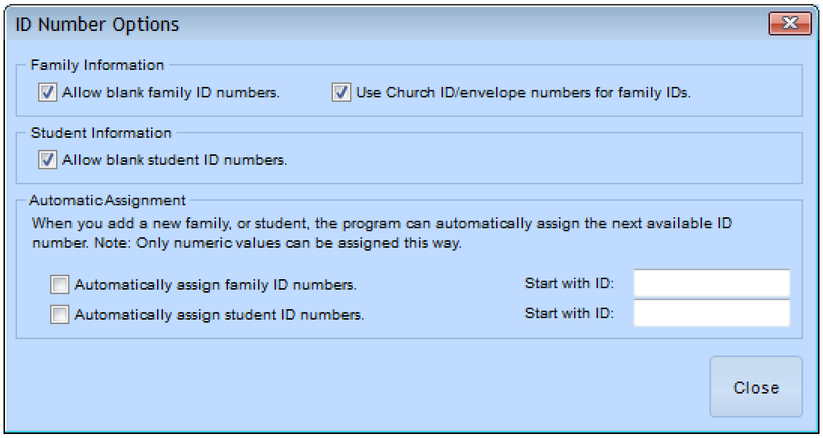

Fig. 15-28.

The Initial Setup Window

In the Initial Setup window, you can specify various program options and preferences, such as the default picture location, the organization's Federal ID for end-of-year tax statements, etc.

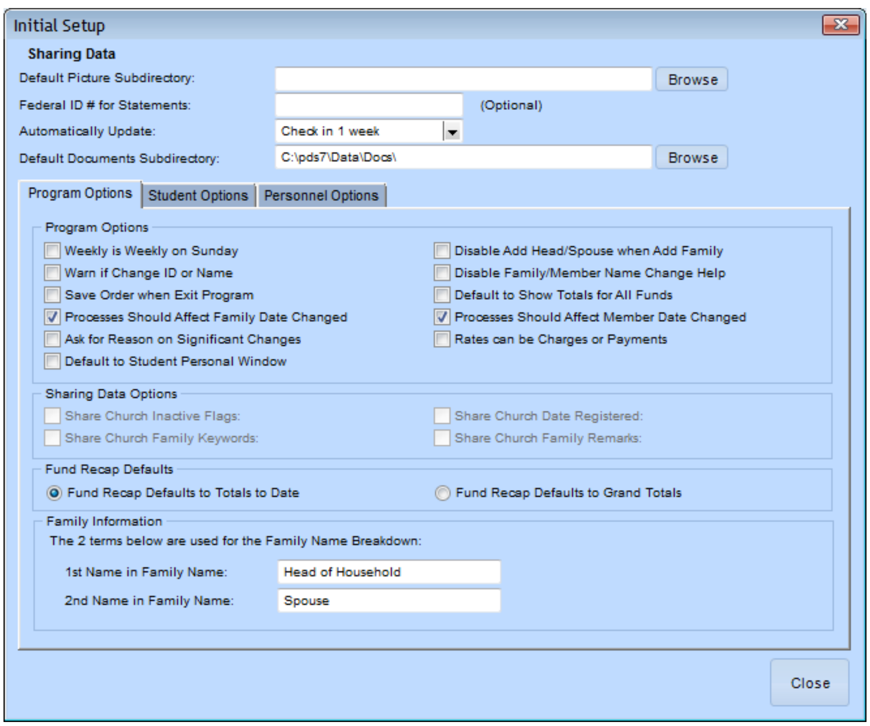

Fig. 15-29.

To specify program options and set the default picture directory

1. On the File menu, click **Setup > Initial Setup**.
2. If you plan to attach digital images of families or members, you need to specify the **Default Picture Subdirectory**. In order for the images to be included in automatic data backups, set the default location to the Pictures folder inside the PDS Formation data folder. For example, X:\PDSForm\Data\Pictures. This increases the size of your backup. If you set the default location outside the PDS Data folder, you must remember to manually back up the digital images. To specify the default location, click **Browse**. Navigate to the picture subdirectory and click **OK**.
3. Enter the Federal ID# for Statements. This field is optional.
4. Use the drop-down list to specify when the program should automatically check for updates.
5. Enter the path where you store documents that are associated with families and members.
6. On the Program Options tab, under **Program Options**, select one or more of the options. Under **Sharing Data Options**, select one or more of the options. Under **Fund Recap Defaults**, select one of the options to specify how fund totals are reported in the Recap section of the Tuition & Fees window. Under **Family Information**, enter the appropriate text.
7. On the Students Options tab, for **Sacrament Sponsor Format**, select how you want the sponsor name to print on sacrament certificates. Under **Student Information**, enter the terms you want to display in the User Defined Remarks section of the Students Detail window. Under **Attendance Totals**, select how to consider excused absences, unexcused absences, and tardies when totaling absences.
8. On the Personnel tab, under **Other Benefits**, enter the terms you want to use for benefits that display on the Other Benefits tab, found on the Health/Insurance Personnel window. Under **Sharing Personnel Data Options**, select whether or not to share certain personnel data from Formation with the Church or School Office programs.
9. Click **Save/OK > Close**.

Program Options

Weekly is Weekly on Sunday — When selected, the program will calculate recurring terms and rates based on the number of Sundays in the recurring period. In the Tuition & Fees window, when you set up a recurring charge and select the terms, by default, the Weekly option looks at the selected starting date and calculates the amount based on the number of times that day of the week falls within the recurring period. If the starting date is on a Wednesday and you select Weekly, the recurring charge will apply every week on Wednesday, which may affect how the amount is calculated. For example, there can be 53 Wednesdays in a year, but only 52 Sundays.

Warn if Change ID or Name — When selected, you will receive a warning when you change a family or member name or ID number.

Save Order when Exit Program — When selected, users can save the navigation order set in the main data entry windows.

Processes Should Affect Family Date Changed — When selected, this option alters the Screen Changed date on the family record every time a process is run.

Ask for Reason on Significant Changes — When selected, the program will automatically log occurrences of important changes to family information and the reasons for the changes. Changes to the following family information apply:

- Family Name
- Street Address
- City/State
- ZIP/Postal
- Deleting email address
- Information to be synched with the diocese
- Family status (active or inactive)
- Deleting a family
- Deleting a student, or parent/guardian

If changes are made in another PDS program that is synched with the current PDS program, those changes display in red. When you make a change to specified family information and click **Save**, a dialog box displays the change.

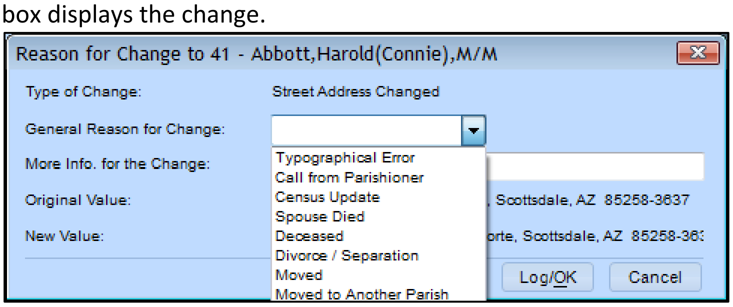

Fig. 15-30.

- **General Reason for Change** — Select a general reason for change from the drop-down list.
- **More Info. for the Change** — Enter more information about the change.
- **Original Value** — This field contains the information as it appeared in the program before the change.

- **New Value** — This field contains the information as it appears in the program after the change.

You can view logged changes and reasons from three separate locations within the program:

- The **Reason for Changes** link in the navigation pane of the Families window.
- The **View Log of User Activity** dialog box.

Default to Student Personal Window — If selected, when you click **Students** on the Information tab, the Personal window displays. If cleared, the Detail window displays first.

Disable Add Head/Spouse when Add Family — Normally, the program defaults to adding the head or spouse record when adding a family record. When this option is selected, the program will not automatically add a head or spouse.

Disable Family/Member Name Change Help — Normally, the program asks several questions if the user changes family or member names. When this option is selected, the question dialog box is disabled.

Default to Show Totals for All Funds — When selected, the display default for fund totals is show totals for all funds.

Processes Should Affect Member Date Changed — When selected, this option alters the Screen Changed date on the member record every time a process is run.

Rates can be Charges or Payments — When selected, this option sets a recurring activity as either a charge or a payment. If cleared, it will only allow you to have a recurring activity as a charge.

Sharing Data Options

In this section, you can control settings that are used when you share the database with other PDS Office programs. In Church Office, you must enable the selected field you want to share, then in the Initial Setup window of Formation Office, you must select to use the shared field.

Share Church Inactive Flags — When selected, you have the option of sharing the Inactive status with the Church Office program.

Share Family Keywords with Other Office Programs — When selected, you have the option of sharing the family keywords list with the Church Office program.

Share Date Registered with Other Office Programs — When selected, you have the option of sharing the registration date with the Church Office program.

Share Family Remarks with Other Office Programs — When selected, you have the option of sharing the remarks entered in the Families window with the Church Office program.

Fund Recap Defaults

Select if you want the totals in the Recap/Totals section of the Tuition & Fees window to default to totals to date or the grand total.

Family/Member

1st Name in Family Name — Enter a description for the first name entered in the Family Name dialog box, such as “Head of Household”.

2nd Name in Family Name — Enter a description for the second name entered in the Family Name dialog box, such as “Spouse”.

Student Options tab

Sacrament Sponsor Format — Select how sponsor names print on sacrament certificates.

Student Information — Edit the default Student Field values. These values display as the tab names at the bottom of the student's Detail window.

Personnel Options tab

Other Benefits Names — Set up to four custom benefit names to display in the personnel's Health/Insurance window.

Sharing Personnel Data Options— Select whether to share certain personnel data from Formation Office with the other Office programs.

Changing Title Definitions

To change title definitions, on the File menu, click **Setup > Title Definitions**. This dialog box displays the different available family and member title abbreviations and operates, similar to a keyword list. You can add new titles or delete titles you no longer use. The default values in this dialog box also include a full list of military titles.

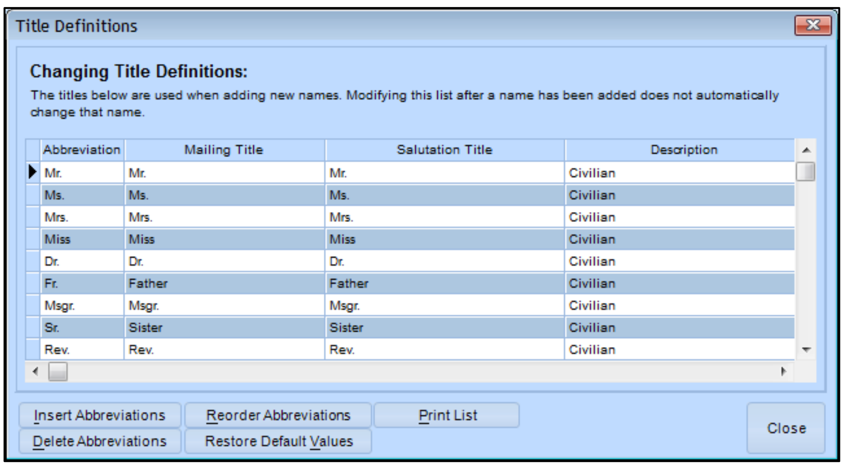

Fig. 15-31.

To add a new title

1. On the File menu, click **Setup** > **Title Definitions**.
2. On the Title Definitions dialog box, click **Insert Abbreviations**.
3. The program inserts a blank line at the end of the list on which you can add an abbreviation and titles.
4. Use **Reorder Abbreviations** to move items in the list.
5. Click **Save/OK**, then **Close**.

Reorder — To save time, you can move more frequently used titles/abbreviations to the beginning of the list. To reorder the list numerically and then alphabetically, click **Reorder** and click **Sort**.

Restore Default Values — Return to the original list of titles/abbreviations installed with the program. Any changes or additions you made to the list are removed.

Print List — You can print this list. We suggest you provide a copy of this list to all those entering data to use as a quick reference.

Address Abbreviations

The Address Abbreviations list can be used in a process to modify your addresses and when printing reports.

To add or edit address abbreviations, on the File menu, click **Setup > Address Abbreviations**.

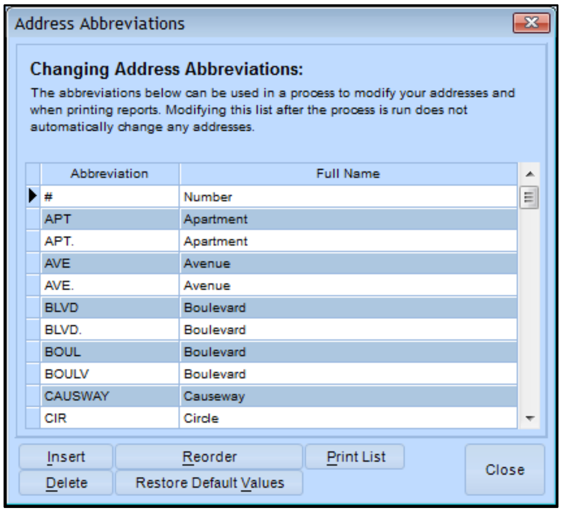

Fig. 15-32.

Useful Information

Modifying this list of address abbreviations after running the Change Address process does not automatically change any addresses.

Unit Name Definition

If you track attendance, you use a unit of time, such as hour or day. This window displays the terms used when tracking attendance, catechist certification, and service/retreats.

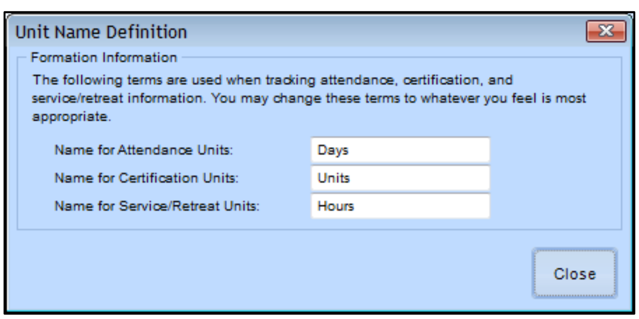

Fig. 15-33.

To specify a term for describing units

1. On the File menu, click **Setup > Unit Name Definition**.
2. In **Name for Attendance Units**, **Name for Certification Units**, and **Name for Service/Retreat Units**, enter a unit name up to ten characters.
3. Click **Save/OK** > **Close**.

Setting Up Email and Text Providers

Email Server Setup

In this window, you can configure the bulk e-mail capabilities of the program. You can also adjust these parameters when you choose to send a letter via email. On the File menu, click **Setup > Email & Text Setup**.

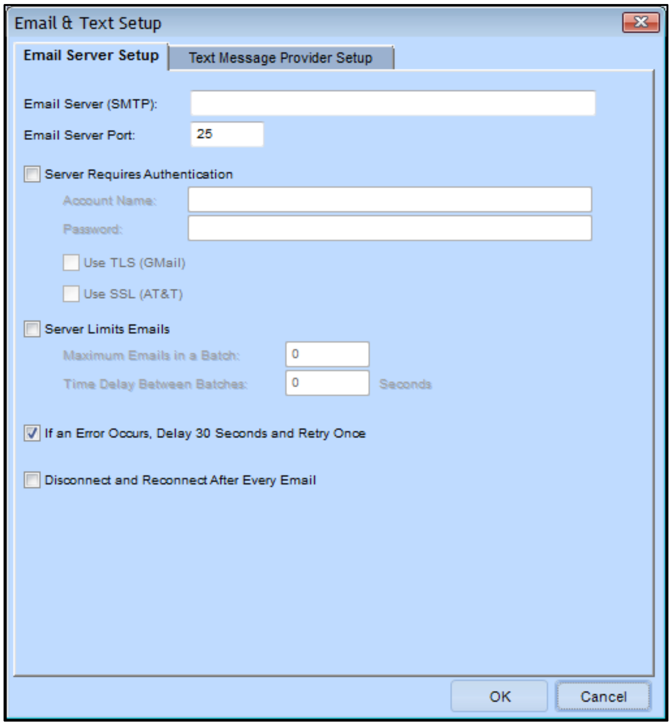

Fig. 15-34.

Email Server (SMTP) — SMTP stands for Simple Mail Transfer Protocol. Obtain these settings from your Internet provider's website or system administrator.

Email Server Port — The default setting is 25. However, you can obtain this setting from your Internet provider or system administrator.

Useful Information

The settings you enter in the **Email Server** and **Email Server Port** fields are typically the same as what is entered in your email client software.

Server Requires Authentication — If your server requires authentication, select this check box. Enter your email account name and password. Select either **Use TLS (GMail)** or **Use SSL (AT&T)** according to which is your email server.

Server Limits Emails — Some servers restrict the number or size of incoming and outgoing email messages. If your server does this, select this option and enter the **Maximum Emails in a Batch** and the **Time Delay Between Batches** in seconds.

If an Error Occurs, Delay 30 Seconds and Retry Once — If your email server experiences an error, you can request that the PDS program try to resend after a 30 second delay.

Disconnect and Reconnect After Every Email — If you would like your server to disconnect and reconnect after each sent email, select this option.

Text Message Provider Setup

You can maintain a list of cellular providers and their corresponding message server addresses. This setup dialog box gives information for popular text providers. To locate information for other providers, contact the provider.

Important Note

In order to send text messages, you must enter the proper information on the Email Server Setup tab, as the messages are delivered by email to the cellular provider.

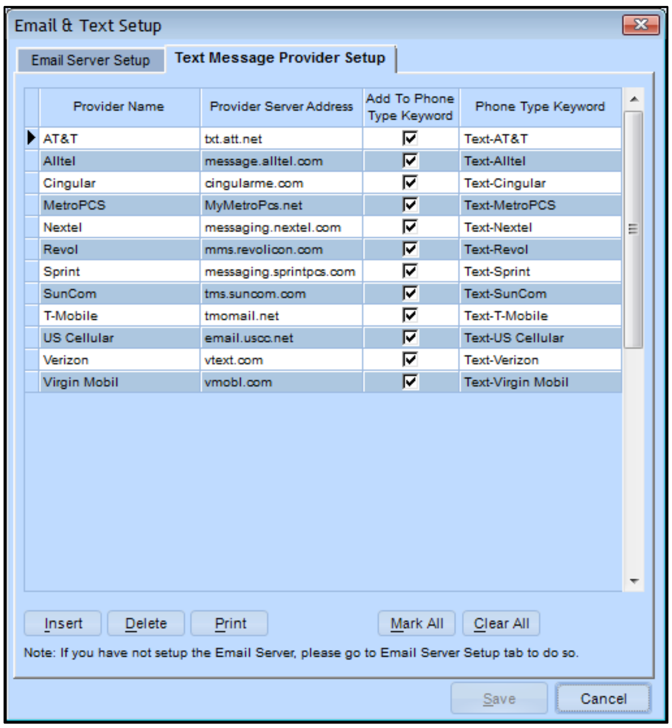

Fig. 15-35.

Batch Number and Tax Limits

Batch numbers are automatically assigned during financial quick postings. The batch numbers on this window are updated as they are used.

The IRS requires substantiation for tax-deductible cash contributions and for Quid Pro Quo contributions above a specified amount. **Tax Limits** refer to the IRS donation substantiation regulations, and this information can be obtained from the IRS. Enter the amounts in this window, and update amounts as IRS regulations change.

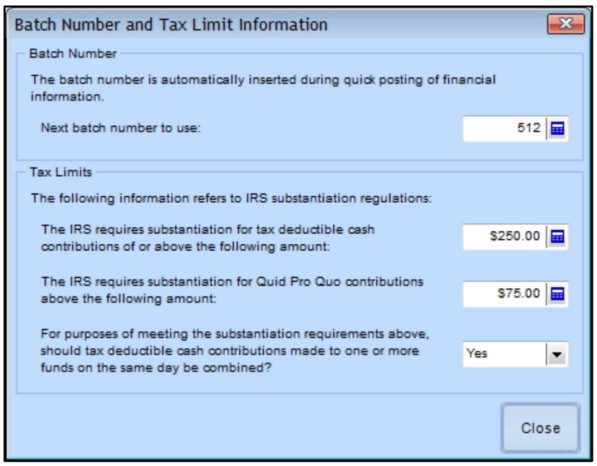

Fig. 15-36.

To set up Batch Numbers and Tax Limit Information

1. On the File menu, click **Setup > Batch Number and Tax Limit Information**.
2. Enter the **Next batch number to use** for the quick posting of financial information.
3. In the field labeled "The IRS requires substantiation for tax-deductible cash contributions of what amount (or more)", enter the beginning amount at which the IRS requires substantiation.
4. In the field labeled "The IRS requires substantiation for Quid Pro Quo contributions above what amount**"**, enter the amount above which the IRS requires substantiation for Quid Pro Quo contributions.
5. In "Should tax deductible cash contributions made to one or more funds on the same day be combined", select **Yes** or **No**. For example, should a $150 contribution to the organization and a $150 contribution to the Building Fund Drive made on the same day be combined as a $300 contribution and then require substantiation?

Setting Up Your Electronic Fund Transfer Provider

A company such as Vanco, in collaboration with PDS, can process one-time or recurring collections to major credit cards, checking, and savings accounts electronically. Use this feature for weekly, monthly, or periodic contributions, pledge drive payments, or tuition and fee payments.

To set up the EFT feature

1. Contact a clearing house company such as Vanco to obtain a company ID and password.
2. On the File menu, click **Setup > Electronic Fund Transfer**.
3. To stop a family's regularly scheduled EFT deductions if their PDS account balance is zero or if they've made a fund overpayment, select **Check for balance due when assigning EFT charges**.

   Useful Information

   If you don't select this option, the scheduled deduction occurs regardless.

4. Select what you use for EFT transactions, and enter your information.
5. When you're finished, click **Save/OK** > **Close**.

You must enter the family’s terms and rates for payment before you can obtain the family’s bank account or credit card information.

Setting the Default Font for Reports

You can change the default font used for all reports.

Useful Information

Reports are designed using Arial font. Prior to printing, the font is changed to the default font for reports.

On the File menu, click **Setup > Default Font for Reports**. Click **Set Font** to select a font and size. Click **Reset Default** to change it back to size 10 Arial font.

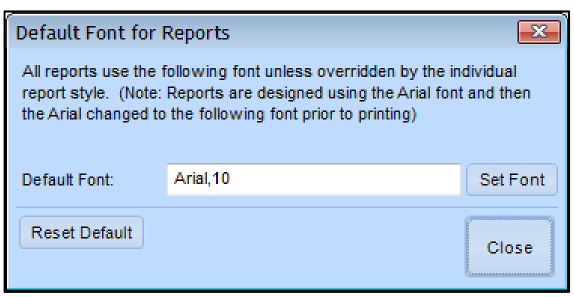

Fig. 15-37.

You can also change the base font for a single report in the report layout window.

Setting Catechist Certification Requirements

With this option, you can set up your diocesan and other requirements for catechist certification. To access the Certification Requirements window, on the File menu, click **Setup** > **Certification Requirements**.

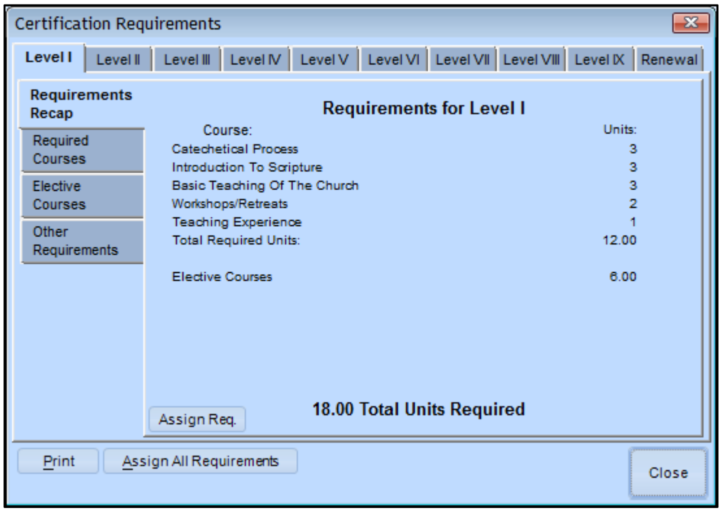

Fig. 15-38.

There are ten levels (I through IX and Renewal) available on the Certification Requirements window. Each level's tab contains these following side tabs:

- **Requirements Recap** — Lists all the required courses, elective courses, other requirements, and total units required for certification. The Recap window provides a summary of information on the status of all levels of certification. If you delete a course or requirement from this list, you can remove the course or requirement from all windows.
- **Required Courses** — Lists all the courses required for certification as defined by your organization.
- **Elective Course** — Lists all the courses that are not necessarily required for certification as defined by your organization.
- **Other Requirements** — Lists the other requirements needed as defined by your organization for certification. You can manually enter a course name and description.

To insert requirements

1. On the File menu, click **Setup > Certification Requirements**.
2. Select the level you want to insert a requirement for.
3. Click a side tab to insert either required courses, elective courses, or other requirements.
4. Click **Insert**, and enter the requirement information.
5. Click **Save/OK**.

You can assign required courses, elective courses, and other requirements for a particular level. After you assign requirements, all catechists must complete the requirements before moving to the next level.

To assign requirements for a certain level

1. On the File menu, click **Setup > Certification Requirements**.
2. Select a Level tab or the Renewal tab.

3. To assign only the required courses, the elective courses, or the other requirements, click the corresponding side tab, and click **Assign Requirements**.
4. To assign all the requirements for the level, click **Requirements Recap** and click **Assign Req**.

> **Useful Information**
>
> Requirements are also added to the Certification section of the Catechists window.

5. Click either **Remove Courses/Reqs** or **Keep Courses/Reqs** to remove or keep the existing requirements on the Certification window.

You can also add requirements for all requirement levels and courses to the Catechists window.

To assign requirements for all levels

1. On the File menu, click **Setup > Certification Requirements**.
2. At the bottom of the window, click **Assign All Requirements**.
3. Click either **Remove Requirements** or **Keep Requirements** to remove or keep the existing requirements on the Certification window

You can use a list of courses from another certification level and add them to your current level.

To borrow a course

1. On the File menu, click **Setup > Certification Requirements**.
2. On the Elective Courses tab, click **Borrow**.
3. Select the certification level you want to borrow.
4. Click **Save/OK**.
5. After the list is inserted, click **Line Delete** to remove items that aren't needed.

Additional Field Information

Reorder — We recommend that you use **Reorder** to move more frequently used items to the beginning of the list instead of deleting items you don't always use from the list.

Print — Print a summary of the certification requirements and units for all levels, and print a certification worksheet for the requirements levels. Use the worksheet to record units completed or to set up courses and units.

Setting Up Special Days and Holidays

With this option, you can set up important dates in the current year. These special days display on the Home window upon entry of the program and anytime you revisit the Home window. On the File menu, click **Setup > Special Days & Holidays**.

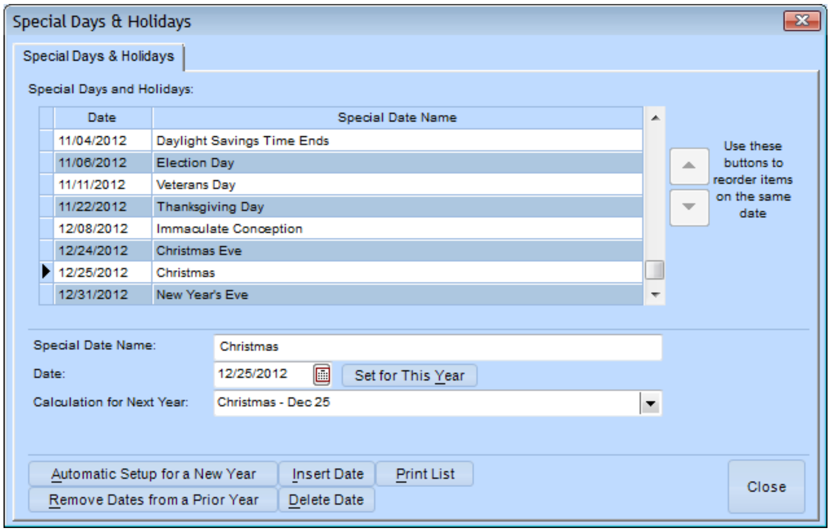

Fig. 15-39.

Additional Field Information

Special Date Name — If you used the **Automatic Setup for a New Year** button to add a list of Special Dates, a name displays here for each date that is set up. When adding your own special dates, you also enter your own date name.

Calculation for Next Year — Determines when your special day or holiday displays in your Home window. You cannot delete or modify these predefined calculations.

Automatic Setup for a New Year — Set up a list of predefined dates. You can replicate dates from a prior year or set up predefined secular, Canadian, Catholic, Jewish, or Eastern Orthodox dates.

- **Add new dates for** — Enter a date range to set up dates.
- **Repeat dates already in the list** — Set up dates for the new year based on dates that were previously set up.
- **Select predefined dates** — Set up dates recognized as holidays and Holy Days. Click **View Dates** to see which dates are already included in the list.
- **Remove Dates from a Prior Year** — Remove old entries for a date range that you specify.

Backup & Restore

The most valuable component of your computer system is its stored data. Guarding it against loss due to a natural disaster or a database corruption is important, especially when you must access your data as quickly as possible. We recommend that you back up your data each day and also store it in a secure, off-site location. The following topics can help you protect your data.

Everyone knows you need to back up your data to prevent data loss. However, not everyone knows how to implement a successful backup strategy.

Planning a Backup Strategy

To help you plan a backup strategy, we recommend the following:

- Commit to a plan that includes a schedule for making daily or weekly backups.
- Test your backup process and restore your data monthly or quarterly.
- Store at least one month's worth of data on multiple sets of backup media for extra protection.
- Keep a log to record dates and details about your backups. Include when the backup happened, who made the backup, and which backup set was used.
- Each month, run the Test the Program and the Fix Data Discrepancies processes to identify and repair small problems.

About PDS Backups

You can create backups of your data both automatically and manually. With the Automatic Backup feature, your current data is backed up on the day(s) you select. You can also create a manual backup of your data at any time.

About Internal Archive Folders

You can manage the number of automatic and manual backup files stored in internal archive folders on your hard drive. Your program data folder contains the following internal archive folders: Weekly, Monthly, Quarterly, and Yearly.

When a backup file is created, it's stored in the Weekly folder. Depending on your automatic backup setting, the old backup files are automatically moved or deleted when a backup is complete.

The files are moved from one folder to another in the following ways:

- Weekly to Monthly
- Monthly to Quarterly
- Quarterly to Yearly

About Data Compression

The backup process compresses your data files into a compact archive. Compression reduces the file size and the amount of time required to copy the files to a disk. Backup files have a .pds extension. Although standard compression programs can read the backup files, we recommend using the integrated restore feature of the PDS program to restore lost or damaged data.

Rotating Backup Sets

We don't recommend using the same set of disks each time you create a backup. To reduce or eliminate the chance of data discrepancies and corruption, use different sets of disks every time you back up your data.

For example, if you back up your data each Friday, use at least four backup sets in order to provide better protection. Label these disks **Friday 1**, **Friday 2**, **Friday 3**, and **Friday 4**. If you reuse backup media, be sure to replace them regularly to guarantee performance.

Backing Up Data Manually

A backup is essentially a snapshot copy of your data (not your program or computer) at the time the backup is created. When that backup is restored, or copied back into the program, it will erase whatever data is there and replace it with that snapshot.

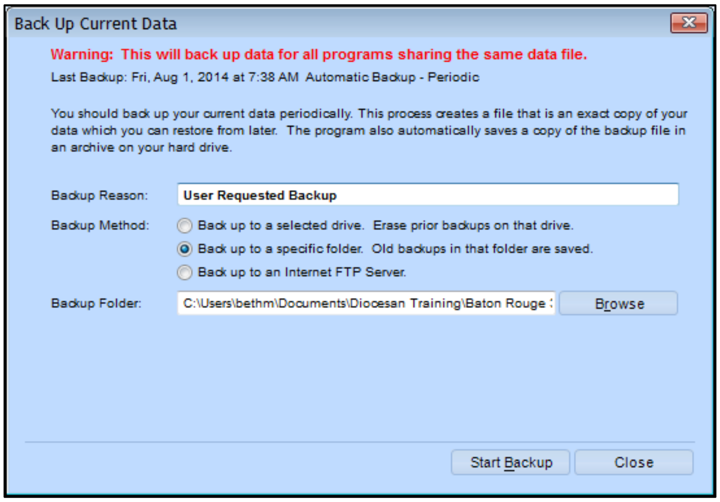

Fig. 15-40.

Before you back up your data, make sure:

- You have enough storage media to complete the backup. PDS backup files require at least 0.5 MB of free space.
- You disable your computer's Hibernate, Sleep, or Stand By options.
- All PDS users are logged out.
- Your backup media is preformatted.

When backing up your data:

- Do not shut down or turn off the power to your computer.
- Do not log off of the computer at any time during the backup process.

To back up your data manually

1. On the File menu, click **Backup/Restore** > **Backup Data**.
2. Enter a backup reason for each backup that you make. This reason prints on the backup report and displays when it is time to restore the data.
3. Select a backup method.
   - **Back up to a selected drive** – Select when backing up to a floppy disk.
   - **Back up to a specific folder** — Select when backing up to the hard drive, CD-ROM, or any other large-media drive.
   - **Back up to an Internet FTP Server** — Select to back up the data to an Internet website.
4. Select a backup folder. This can be any drive/folder on your computer or network. If you selected to back up to an FTP Server, enter the FTP Server information.
5. Click **Start Backup**.

Backing Up Data Automatically

With the Automatic Backup feature, you can set your PDS program to automatically perform backups on selected days.

OnDemand Customers

If you use OnDemand, your backups are automatically made each night and stored on the OnDemand server, so you do not need to schedule automatic backups.

Before you set up automatic backups, you must:

- Install PDS on the computer or server that stores the data.
- Make sure that the computer or server is powered on at the time when the automatic backup is scheduled to run.
- Close all PDS programs installed on other computers.
- Enter your email address in the License Information window. If the program can't complete the automatic backup process, you receive an email notification.

Useful Information

The Automatic Backup feature is not a substitute for manual backups. We recommend creating manual backup files of your data regularly.

Scheduling Automatic Backups for Off-Hours Using Windows

If you want to run your backups after midnight on the scheduled backup day, you can set up a Windows® scheduled task. This isn't required, but otherwise, the PDS Automatic Backup feature can only run when you open your program on the scheduled backup day.

If you create backup files for multiple PDS programs, you must schedule a task for each program. Make sure that the start time for each program is at least 15 minutes apart from any other previously-scheduled task start time. If your PDS program is installed on a network, you must use the shared network name.

Useful Information

The following procedure is for Microsoft® Windows 8® users. For information on creating a scheduled task in an earlier version of Windows, see the help documentation for your version.

To create a scheduled task

1. Locate the Windows Task Scheduler on your computer.
2. In the Task Scheduler window, click **Create Basic Task**. The Create Basic Task wizard displays.
3. Enter a name for the scheduled task, and click **Next**.
4. In the Task Trigger window, select how frequently you want to create automatic backups, and click **Next**.
5. If necessary, select the time, day, or month when you want the update to occur, and click **Next**.
6. In the Action window, select **Start a program**, and click **Next**.

7. In the Start a Program window, click **Browse**, select the PDS program application you want to create a scheduled task for, and click **Open**. The program path appears in the **Program/script** field, and should have an .exe extension.

> **Useful Information**
>
> If the information does not display in the **Program/script** field, right-click on the PDS desktop icon, and click **Properties**. Copy the information that displays in the **Target** field and paste it in the **Program/script** field of Windows Scheduler. At the end of the text, enter "BACKUP".

8. In the Add arguments field, enter "BACKUP". Click **Next**.

9. Review the information, and click **Finish**.

Scheduling an Automatic Backup in Your PDS Program

Once you create a scheduled task in Windows, you must set an automatic backup schedule in your PDS program. You can also set up the Automatic Backup process to run without scheduling a Windows scheduled task.

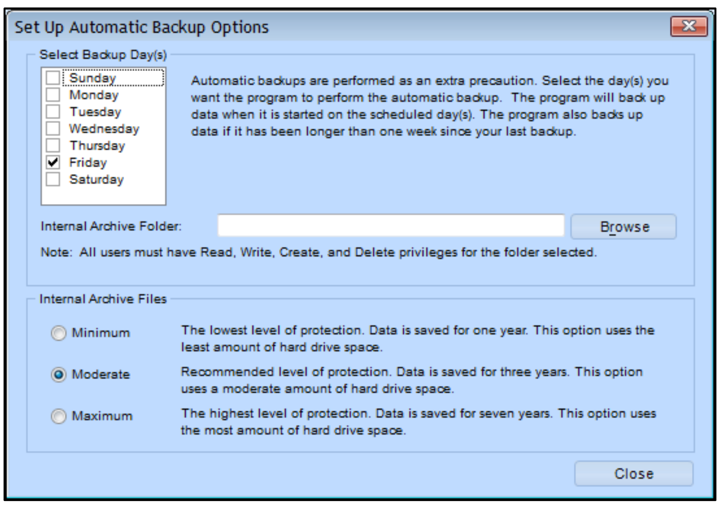

Fig. 15-41.

To schedule an automatic backup

1. On the File menu, click **Backup/Restore** > **Backup Options**.

2. Select the day(s) of the week that you want an automatic backup to run.

3. To select the internal archive folder where you store the automatic backup, click **Browse**. To use the default backup folder, leave this field blank.

4. If your internal archive folder is on another computer, enter the UNC reference to the folder.

> **Useful Information**
>
> This prevents problems for multiple workstations using different drive letters to access the shared folder. For example, enter "\\ServerName\ShareName" instead of "F:\Backup".

5. Select a level of protection for your internal archive files. See more information about these option below.

6. Click **Close**.

About the Minimum Option

If you select the Minimum option, one backup file is stored in each internal archive folder.

Folder Name	Minimum Number of Backup Files in Each Folder	Amount of Time Before Backup is Discarded or Moved
Weekly	1 backup file	7 days
Monthly	1 backup file	30 days
Quarterly	1 backup file	90 days
Yearly	1 backup file	365 days

About the Moderate Option

If you select the Moderate option, several backup files are stored in each internal archive folder.

Folder Name	Minimum Number of Backup Files in Each Folder	Amount of Time Before Backup is Discarded or Moved
Weekly	5 backup files	21 days
Monthly	2 backup files	60 days
Quarterly	3 backup files	270 days
Yearly	3 backup files	1095 days

About the Maximum Option

If you select the Maximum option, the maximum number of backup files are stored in each internal archive folder.

Folder Name	Minimum Number of Backup Files in Each Folder	Amount of Time Before Backup is Discarded or Moved
Weekly	10 backup files	28 days
Monthly	4 backup files	90 days
Quarterly	6 backup files	360 days
Yearly	7 backup files	2555 days

Restoring Data from a Previous Backup

This is the reverse of a backup. A backup is essentially a snapshot copy of your data (not your program or computer) at the time the backup is created. When that backup is restored, or copied back, into the program, it erases whatever data is there and replaces it with that snapshot.

OnDemand Customers

If you use **OnDemand** and need to restore a previous backup, contact Support at 1-877-737-4457.

With this process, you can:

- Restore data from a backup file. For example, if you enter a large amount of incorrect data, you can restore a previous version of the data then enter the correct information.
- Move data to a newly purchased computer.
- Replace files lost due to hard drive failure or file damage.

Useful Information

You cannot restore backup data from read-only media such as CD-ROM disks. To restore data included on read-only media, copy the file to a rewritable drive, then clear the **Read-only** option in the Microsoft Windows file properties dialog box.

Be Careful

When you restore data from a backup, you overwrite data entered after the backup was created.

To restore data from a prior backup

1. On the File menu, click **Backup/Restore** > **Restore Data**.

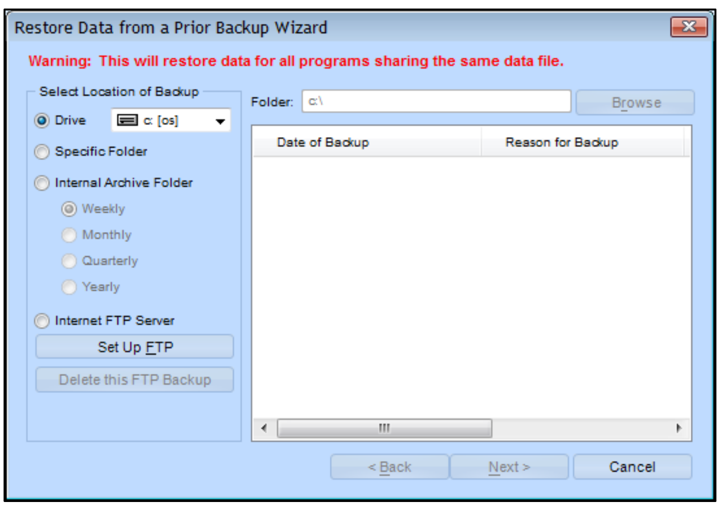

Fig. 15-42.

2. Select where to restore the data from and which backup to restore, then click **Next**. You can restore data from all of the same places to which you can back up the data: **Drive**, **Specific Folder**, and **Internet FTP Server**. To restore data from the automatic backups done by the computer, select **Internal Archive Folder**.
3. If you want to restore specific parts of the data, click **Advanced Restore Options**. For example, if you created a custom user report and someone deleted it, you can restore just this report using the Advanced Restore Options. Select the backup containing the report you want to restore, then select the check boxes of the files associated with this report, and click **Apply/OK**.

Warning

Do not use Advanced Restore Options unless you understand the database. If you restore an incorrect set of files, the program will not function properly. If this happens, use the PDS Rescue program to restore all your files.

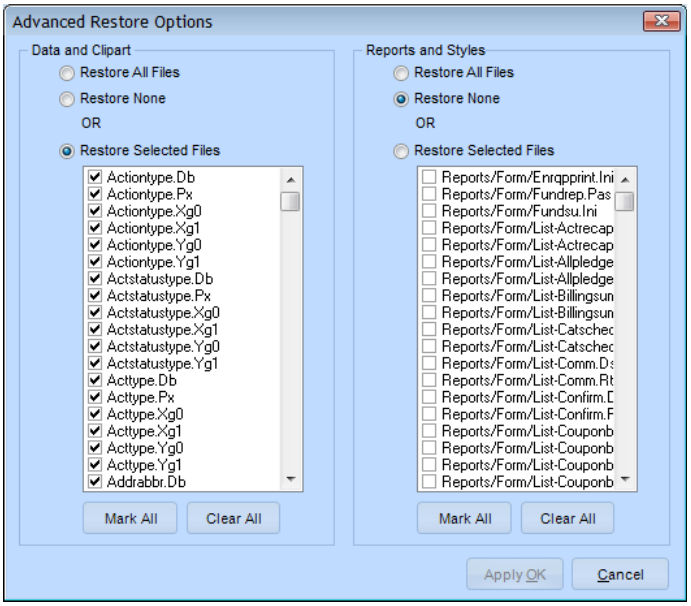

Fig. 15-43.

4. Click **Start Restore** to begin restoring data.

Moving Archived Files to Another Computer

With this process, you can move the active data file and the internal archive data from your hard drive to another computer.

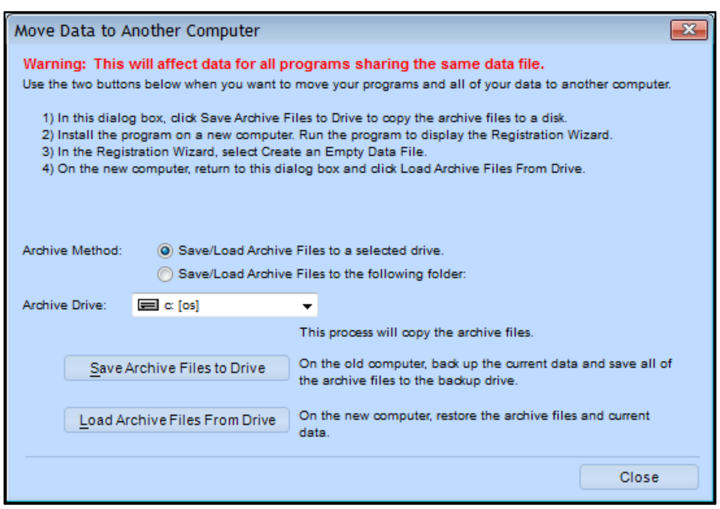

Fig. 15-44.

First, you must save archive files from your old computer.

To save archive files

1. On the File menu, click **Backup/Restore** > **Move to Another Computer**.
2. Select an archive method.
3. Select or enter the drive or folder where you want to save your archive files.
4. Click **Save Archive Files to Disk**.

Before loading archive files to a new computer, you must set up the computer.

First, install the PDS program. When you run PDS for the first time, the Registration/System Information wizard displays. Select **New User** to create an empty data file.

To load archive files

1. On the File menu, click **Backup/Restore** > **Move to Another Computer**.
2. Select an archive method.
3. Select or enter the drive/folder to load your archive files from.
4. Click **Load Archive Files From Disk**. All of the internal archive files from the backup drive are decompressed, and the current data is restored.

Testing, Fixing, & Rescue

Use the Test and Fix utilities to examine the stability of the program and data, and view any data inconsistencies. We recommend running these utilities once a month.

Testing the Program

With this process, you can verify that data files are in good shape. The program and data files can develop discrepancies as a result of improper system shutdown, operating system failure, hard drive failure, computer virus infection, network failure, or other computer complications. To minimize this risk, back up your data regularly.

We recommend periodically running this process to test for data discrepancies, missing files, or configuration issues. To access this process, on the File menu, click **Test/Fix** > **Test the Program**. A dialog box displays stating what parts of the program were tested.

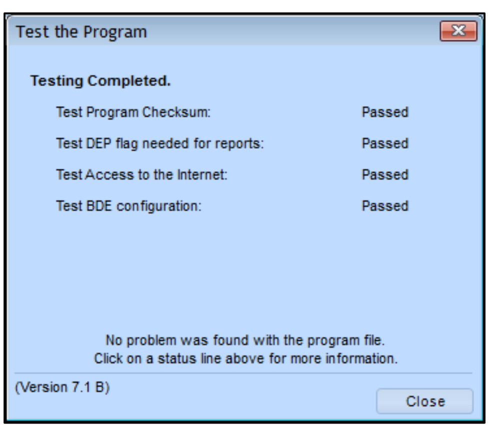

Fig. 15-45.

Once the Test the Program process passes without errors, run the Fix Data Discrepancies process to verify that your data is correct.

Fixing Data Discrepancies

With this process, you can verify that the program does not contain data discrepancies. The program and data files can develop discrepancies as a result of improper system shutdown, operating system failure, hard drive failure, computer virus infection, network failure, or other computer complications. To minimize this risk, back up your data regularly.

Warning

This process can repair some small problems with the data. If severe discrepancies exist, you can restore data from a recent backup. If this happens, however, all information entered since the last backup is lost.

To fix data discrepancies

1. On the File menu, click **Test/Fix** > **Fix Data Discrepancies**.
2. If the "index out of date" error displays, select **Reindex Tables**. To remove empty space in the data tables, select **Pack Tables**.
3. Click **Fix Data**. After the process is finished, a summary report displays.
4. When you're finished, click **Close**.

Using the Rescue Program

The Rescue program is located on the program CD. If you downloaded your PDS program from the web, the Rescue program is in the Setup program, and its icon is a red cross. Use this to back up, restore, and run the Test and Fix utilities when you cannot open the program in the usual way. You can also use the Rescue program to erase data files and disable passwords.

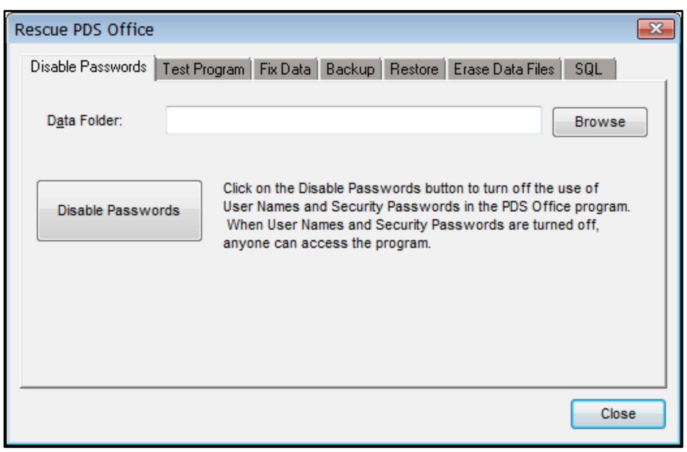

Fig. 15-46.

Be Careful

Use the Rescue program as a last resort for password information. If there are other security administrators, ask them to set up another password for you.

When you installed the program from the CD or downloaded it from our website, if you selected to **Save Full Setup in Update Folder**, then you can access the Rescue program using the setup installed on the computer in the program's Update folder.

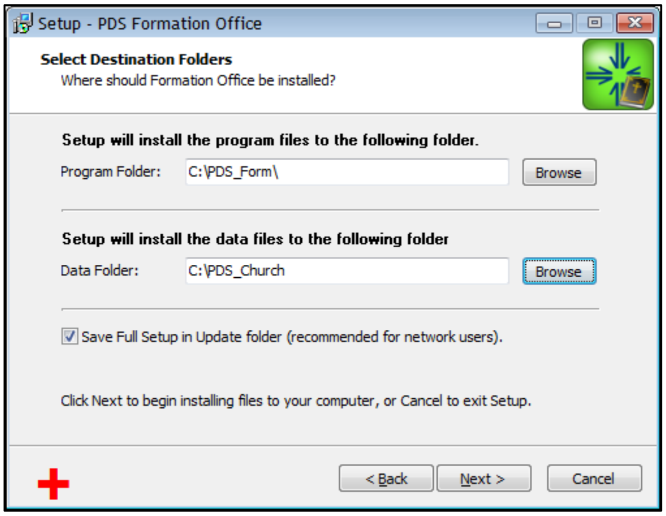

Fig. 15-47.

Before using the Rescue program, exit all open programs on your computer. All other users must exit the PDS program before you continue.

To use the rescue program

1. From either your PDS program CD or your local installation directory, double-click and run the FormationOffice7Setup.exe file.
2. To access the Rescue program, click the red cross in the bottom left of the Setup window.
3. When you're ready to run the Rescue program, click **Next**.
4. Select your program, and click **OK**.

Disable Passwords

You can disable all passwords if, for example, the security administrator has forgotten his or her password or an error prevents the program from starting correctly.

The Disable Passwords process doesn't delete user settings or passwords, but it disables the requirement of providing a name or password when entering the program.

To disable passwords

1. In the Rescue Program dialog box, click the **Disable Passwords** tab.
2. Verify or enter the path for the data folder.
3. Click **Disable Passwords**.

Erase Data Files

You can set up an empty data file, convert data from an old data file, or restore from a prior backup.

Be Careful

Use this command only as a last resort.

To erase data files

1. In the Rescue Program dialog box, click the **Erase Data Files** tab.
2. Verify or enter the path for the data folder.
3. Make your selections. For more on these options, see the Additional Field Information below.
4. Click **Erase Data Files**.

Additional Field Information

Keep License — Keep your program license information after erasing data files. If you don't select this option, you must re-enter the license information when the program opens.

Erase Files From Clipart — Erase clipart files from the Clipart folder located inside the Data folder. These files must be erased before reconverting from the old data file and should be erased if you have data discrepancies.

Erase Files from Reports — Erase report files from the Reports folders, including easy and custom reports. These files must be erased before reconverting from the old data file, and should be erased if you have data discrepancies.

SQL

Warning

PDS is not responsible for any data changes made when you use this utility. It's provided solely for individuals who are familiar with database manipulation with SQL and need to correct an error in their data or run a specific query.

Structured Query Language (SQL) is commonly used in database programs to access the raw data files.

To structure query language

1. In the Rescue Program dialog box, click the **SQL** tab.
2. Verify or enter the path for the data folder.
3. Enter the SQL statement, and click **Exec** to execute the changes made to the data fields.
4. Click **Open** to process the query and display the results.
5. Click **Save Results** to save the results in a Comma-Separated Value (.csv) file.

Exercises

Exercise #1

Change the program name to "Sue's Favorite Program", but use your own name.

Exercise #2

Create a user profile for yourself, including a password. Make yourself a security administrator, and give yourself **All Access** to everything, including Individual Funds.

Exercise #3

Set the security method to ask for name and password.

Exercise #4

Add HRH – 'Her Royal Highness' – to the Title Definitions.

Questions

Answer these questions pertaining to additional features.

Q: Where do you go to change the term used for tracking Service/Retreat attendance?

A: ____

Q: Where do you maintain the names and addresses of the churches tracked in Sacraments?

A: ____

16: Sacramental Registers

Useful Information
To use this feature, you must purchase it by calling 800-892-5202. For more information, visit www.parishdata.com/sacramentaltracking.

With the Sacramental Registers feature, you can locate, view, manage, and print member sacrament records. Before you can create sacramental registers, you must set up your sacrament options.

After setting up your sacrament options, you can define sacrament register options if you need to track the sacrament records of other churches in a multi-church situation. For example, your church might maintain sacrament data for smaller churches in the same cluster or for missions.

The sacramental registers are operated from the Sacramental Register tab after you briefly define some keyword associations through the File menu under Sacrament Setup. Changes made to the Sacramental Registers tabs are reflected in the Sacraments section of the individual's record and vice-versa.

Preparing to Use Sacramental Register

First, while not required, you should update your list of sacrament place names to get rid of duplicate entries. Whenever you manually enter a place instead of selecting it from the drop-down lists, it is added to the list of available places, even if that item is already in the list. Furthermore, a place might have been entered with one or more spellings. “St. Mary’s,” for instance, might exist alongside “St. Marys” and “Saint Mary’s.” If this is the case, you can combine duplicate sacrament place names.

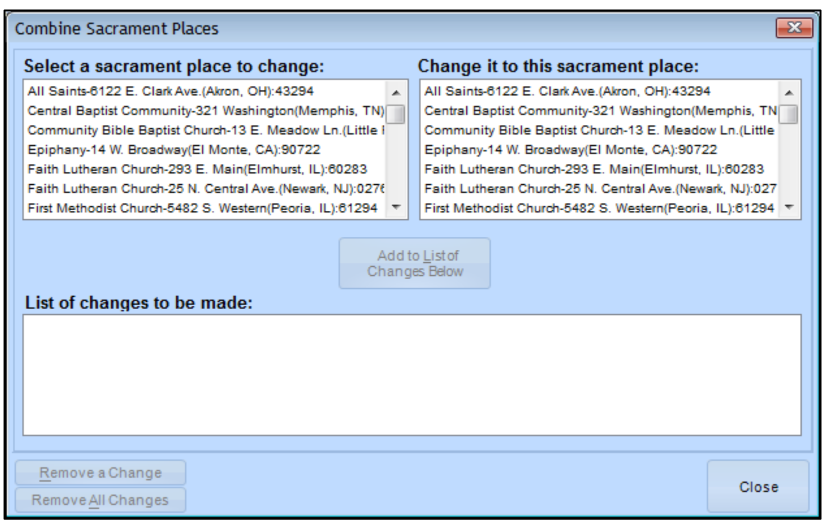

Fig. 16-1.

To combine duplicate sacrament place names

1. On the File menu, click **Sacrament Setup > Sacrament Place Names and Addresses**.
2. Click **Combine**.
3. In the left pane, select the place names you no longer want to use. Hold down the **Ctrl** key while clicking to select more than one name.

4. In the right pane, select the place name that should replace the places you selected in the left pane.
5. Click **Add to List of Changes Below**.
6. Repeat this for any other sacrament places you want to combine.
7. Review the list of changes in the lower pane.
8. Click **Combine/OK**.

Next, select the sacrament keywords to be used. Some like to specify their own sacrament keywords other than those built into the program. Because of this, the Sacramental Registers system process is not pre-programmed to search for data associated with any specific sacrament keywords. So, defining which keywords you use to denote the various sacraments is a necessary step before using the sacramental register.

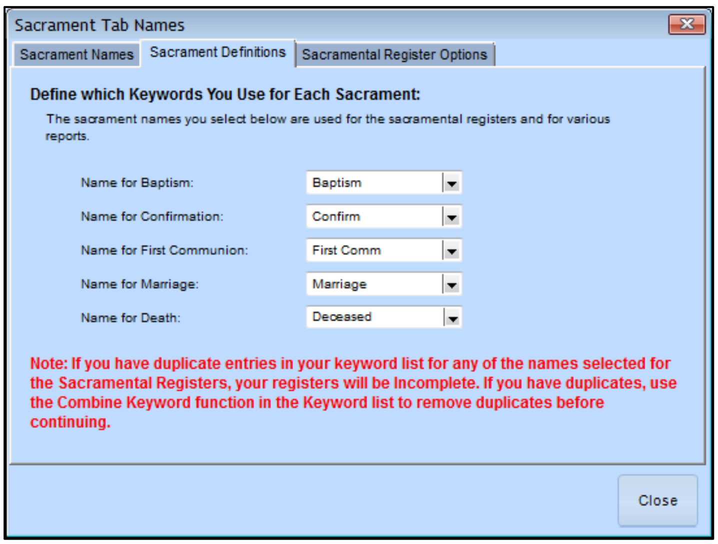

Fig. 16-2.

To set up keyword definitions for the sacramental registers

1. On the File menu, click **Sacrament Setup > Sacrament Tab Names**.
2. On the **Sacrament Definitions** tab, select the keywords your organization uses to denote baptism, confirmation, first communion, marriage, and death. Typically, **Name for Baptism** will be **Baptism**, and so on. If necessary, click the **Sacrament Names** tab to see which keywords are being used in your program; these associations are reflected as the sacrament tab names in the Students window.
3. Click **Save/OK**, then **Close**.

Finally, define sacrament register options. This is only necessary if you need to track the sacrament records of other churches in a multi-church situation. Suppose, for instance, your church maintains sacrament data for smaller churches in the same cluster or for missions. Follow this procedure to specify those churches.

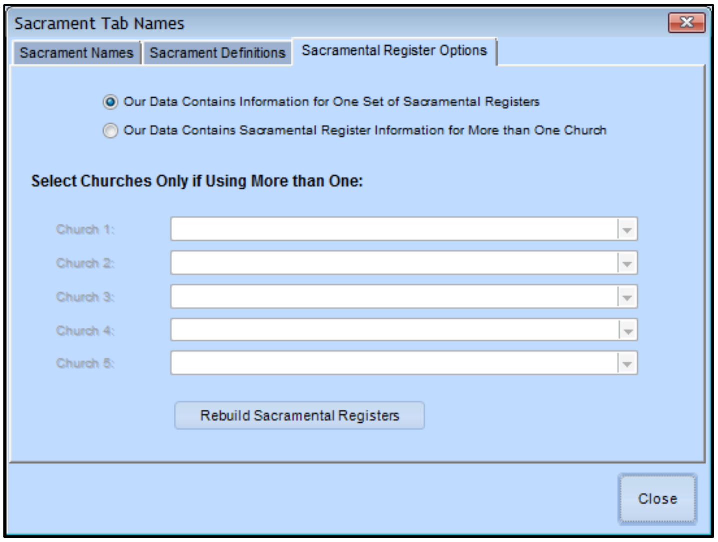

Fig. 16-3.

To set up sacramental data for more than one church

1. On the File menu, click **Sacrament Setup > Sacrament Tab Names.**
2. On the **Sacramental Register Options** tab, select **Our Data Contains Sacramental Register Information for More than One Church**.
3. Select up to five churches whose sacramental records are included in your database.
4. Click **Rebuild Sacramental Registers**.

Caution

When you click **Rebuild Sacramental Registers**, it removes all existing member information and rebuilds it. Non-member information is not affected. If you click **Cancel** before the process is completed, all sacramental register information for existing parishioners is lost and you will have to run the process again.

About Creating Sacramental Registers

Create your sacramental registers by opening the Sacramental Registers.

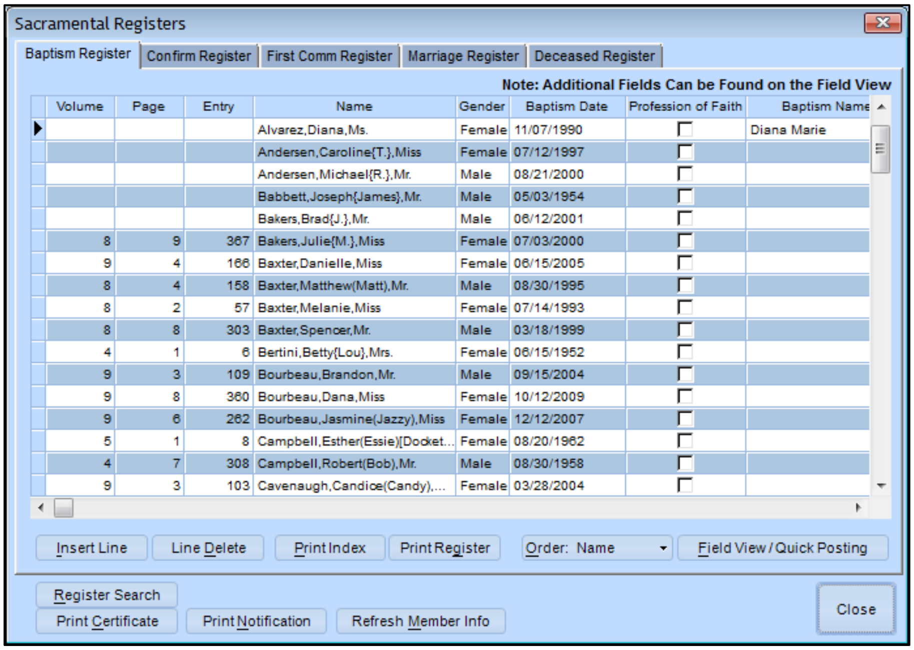

Fig. 16-4.

To create your sacramental register

1. On the Sacramental Register tab, click **Sacramental Registers**.
2. The first time you use Sacramental Registers, the program compiles a list of records associated with sacrament keywords.
3. Edit and update the records, as needed, in the grid. Click **Save/OK** after making changes. Changes made to a record here are reflected also in the Sacraments section of the Students window.
4. Click **Close**.

Useful Information

If you track sacraments for multiple churches (a cluster or missions, for example), a drop-down list displays in the lower-right corner of the Sacramental Registers window. Use this to filter the entries in the grid.

Additional Field Information

Print Certificate Back — Click to display the Certificate Back Page dialog box. If you select **Mark as Invalid for Marriage**, then the statement "Not Valid for Marriage" displays on the back page of the certificate. Information entered in the **Notations** text box displays in the **Notations** section.

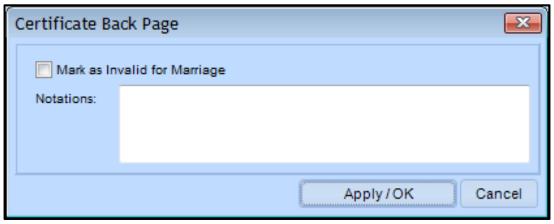

Fig. 16-5.

Print Index — Print an index view (single-line entries) of the register for the open current sacrament tab. Enter the volume you want to print. You are also asked whether to sort the entries alphabetically or by page number.

Print Register — Print a detailed report of the register for the sacrament on the open tab. Enter the volume you want to print.

Order — Sort the entries in the grid by volume/page, name, or date.

Field View/Quick Posting — Use this view to see and edit the details of each record. For more on editing records using the field view, see About Editing Sacramental Records.

Register Search — Search the sacramental registers for a record.

Print Certificate — Print certificates for a record.

Print Notification — Print a notification letter for Confirmation, First Eucharist, or Marriage. Print notification is not available for the Baptism or Deceased registers.

Refresh Member Info — Refresh information within the member record. Click **Refresh Member Info** to compare the sacramental register and member record. Then the program can update the sacramental register with the member record information according to your selection in the **Confirm** dialog box.

> **Be Careful**
>
> This is different from the Rebuild Sacramental Registers button located on the Sacramental Register Options tab.

About Adding Sacramental Records

You can add sacramental records to each register for members as needed.

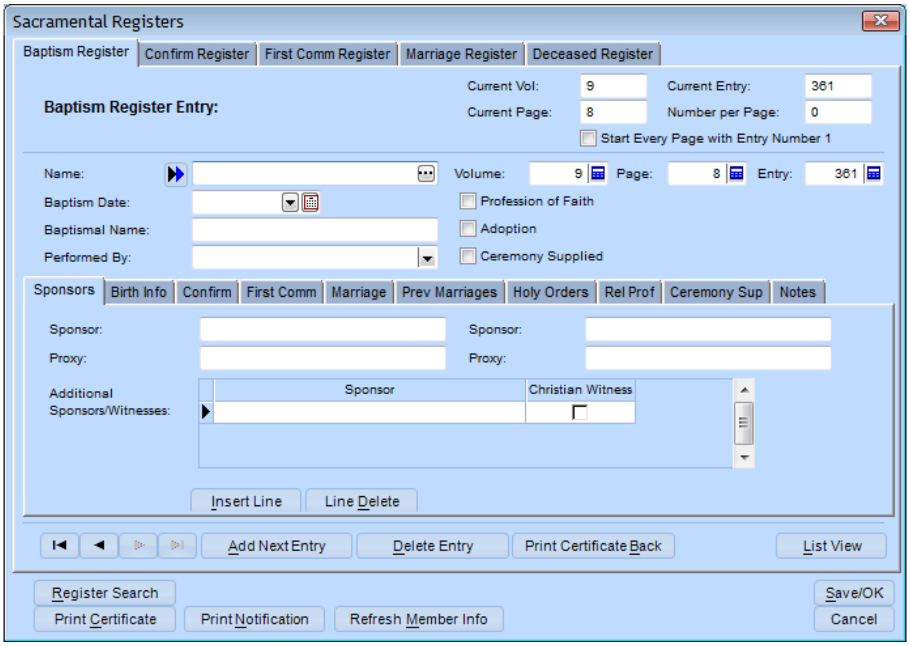

Fig. 16-6.

To add a record

1. On the Sacramental Register tab, click **Sacramental Registers**.
2. Click the appropriate sacrament tab.
3. Click **Field View/Quick Posting**.
4. Click **Add Next Entry**. The fields on the tab clear.
5. Enter the new sacrament record information, or click the double arrows in front of **Name** to open the Get Existing Member dialog box. If entering sacrament information for an existing member, select the member, then click **Use/OK.**
6. Once you enter all relevant information for the sacrament, click **Save/OK**.

About Deleting Sacramental Records

You can delete sacramental records when needed.

To delete a record

1. On the Sacramental Register tab, click **Sacramental Registers**.
2. Click **Register Search**, and enter the information for the record you want to delete.
3. Click **Search**.
4. In the grid, double-click the record you want to delete.
5. Click **Delete Entry**.
6. Click **Yes** to confirm the deletion.

Useful Information
When you delete a member's record in the Students window, the Sacramental Register retains any sacramental information associated with the member, unless you delete the sacrament record as described above.

About Locating Sacramental Records

If you know the type of sacrament and the name associated with a record, you can probably scroll through the list view to locate it. For a more advanced search, you can use the Register Search.

To search for records in the Sacramental Registers

1. On the Sacramental Register tab, click **Sacramental Registers**.
2. Click **Register Search**.
3. Select the check boxes to indicate which type(s) of sacraments to search.
4. Enter as much or little information as you want to in the remaining fields.
5. Click **Search**. A Search Results grid opens to display the results.
6. Double-click an entry to open the record.

About Editing Sacramental Records

The Sacramental Registers contain more detailed information than the Sacraments section of the individual's record. Once you have populated the tabs with existing records from your database, you might want edit or add more information.

To edit records in the Sacramental Registers

1. On the Sacramental Register tab, click **Sacramental Registers**.
2. Locate the record you want to edit either by scrolling through the grid or by using the Register Search.
3. Double-click the name in the grid. The Register Entry view opens.
4. Edit the fields as needed.
5. Click **Save/OK**.

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17: Appendix

Predefined Fund Setups

The program contains several predefined fund setups that you can use as models for your funds.

Church Contributions

Group	Activity	Function
Donation to Church		
	Offering	Payment-Deductible
	Holy Days	Payment-Deductible
	Easter Donations	Payment-Deductible
	Christmas Donations	Payment-Deductible
	Total Donations	Group Total
Misc. Activities		
	Non-Cash Donation	Non-Cash Contribution-Deductible
	Fall Dinner/Dance $20	Quid Pro Quo
	Flower Donation	Payment-Deductible
	Homeless Shelter	Payment-Deductible
	ISF Check	Ignore

Church Contributions with Extra Contributions

Group	Activity	Function
Donation to Church		
	Offering	Payment-Deductible
	Holy Days	Payment-Deductible
	Easter Donations	Payment-Deductible
	Christmas Donations	Payment-Deductible
	Total Donations	Group Total
Extra Contributions		
	Missions	Payment-Deductible
	Charity & Development	Payment-Deductible
	Rice Bowl	Payment-Deductible
	Bishop’s Relief	Payment-Deductible

	Special Needs	Payment-Deductible
	Communication	Payment-Deductible
	Home Missions	Payment-Deductible
	Propagation of Faith	Payment-Deductible
	Retirement Fund	Payment-Deductible
	Emergency Fund	Payment-Deductible
	Total Extra	Group Total
Misc. Activities		
	Non-Cash Donation	Non-Cash Contribution-Deductible
	Fall Dinner/Dance $20	Quid Pro Quo
	Flower Donation	Payment-Deductible
	Homeless Shelter	Payment-Deductible
	ISF Check	Ignore

Stewardship

Group	Activity	Function
Donations to Church		
	Pledged Payment Due	Charge
	Pmt/Pledge	Payment-Deductible
	Holy Days	Payment-Deductible
	Easter Donation	Payment-Deductible
	Christmas Donation	Payment-Deductible
	Pledge Balance	Balance
Misc. Activities		
	Non-Cash Donation	Non-Cash Contribution-Deductible
	Fall Dinner/Dance $20	Quid Pro Quo
	Flower Donation	Payment-Deductible
	Homeless Shelter	Payment-Deductible
	ISF Check	Ignore

Formation

Group	Activity	Function
Formation Tuition		
	Formation Tuition Due	Charge
	Pmt/Formation Tuition	Payment-Non-Deductible
	Pmt/Formation Tuition From Last Yr	Payment from Last Year-Non-Deductible
	Catechist Tuition Credits	Credits-Non-Deductible
	Refund/Formation Tuition	Refund-Non-Deductible
	Formation Tuition Balance	Balance
Next Year’s Tuition		
	Next Year Formation Tuition Due	Charge
	Pmt/Next Year Formation Tuition	Payment-Non-Deductible
	Next Year Formation Tuition Bal	Balance
Registration Fee		
	Reg Fee Due	Charge
	Pmt/Reg Fee	Payment-Non-Deductible
	Pmt/Reg Fee from Last Yr	Payment from Last Year-Non-Deductible
	Refund/Reg Fee	Refund-Non-Deductible
	Reg Fee Balance	Balance
Next Year’s Registration		
	Next Year Reg Fee Due	Charge
	Pmt/Next Year Reg Fee	Payment-Non-Deductible
	Next Year Reg Fee Bal	Balance
Book Fees		
	Book Fees Due	Charge
	Pmt/Book Fees	Payment-Non-Deductible
	Refund/Book Fees	Refund-Non-Deductible
	Book Fee Balance	Balance
Sacrament Preparation		
	Sac Prep Fee Due	Charge
	Pmt/Sac Prep Fee	Payment-Non-Deductible
	Refund/Sac Prep Fee	Refund-Non-Deductible
	Sac Prep Fee Balance	Balance
Prior Year		

	Prior Year Tuition Due	Charge
	Prior Year Fees Due	Charge
	Pmt/Prior Year	Payment-Non-Deductible
	Prior Year Balance	Balance
Late Charges		
	Late Charge Due	Charge
	Pmt/Late Charge	Payment-Non-Deductible
	Late Charge Balance	Balance
Volunteer/Service Hours		
	Hours Pledged	Hours Pledged
	Completed Hours	Hours Completed
	Hours Remaining	Hours Remaining
Misc. Activities		
	ISF Check	Ignore

School Tuition

Group	Activity	Function
Tuition		
	Tuition Due	Charge
	Pmt/Tuition	Payment-Non-Deductible
	Pmt/Tuition From Last Yr	Payment from Last Year-Non-Deductible
	Tuition Credits	Credits-Non-Deductible
	Scholarship Credits	Credits-Non-Deductible
	Refund/Tuition	Refund-Non-Deductible
	Tuition Balance	Balance
Next Year's Tuition		
	Next Year Tuition Due	Charge
	Pmt/Next Year Tuition	Payment-Non-Deductible
	Next Year Tuition Bal	Balance
Registration Fee		
	Reg Fee Due	Charge
	Pmt/Reg Fee	Payment-Non-Deductible
	Pmt/Reg Fee from Last Yr	Payment from Last Year-Non-Deductible
	Refund/Reg Fee	Refund-Non-Deductible

	Reg Fee Balance	Balance
Next Year's Registration		
	Next Year Reg Fee Due	Charge
	Pmt/Next Year Reg Fee	Payment-Non-Deductible
	Next Year Reg Fee Bal	Balance
Book Fees		
	Book Fees Due	Charge
	Pmt/Book Fees	Payment-Non-Deductible
	Refund/Book Fees	Refund-Non-Deductible
	Book Fee Balance	Balance
Graduation Fee		
	Graduation Fee Due	Charge
	Pmt/Graduation Fee	Payment-Non-Deductible
	Refund/ Graduation Fee	Refund-Non-Deductible
	Graduation Fee Balance	Balance
Special Activities		
	Science Fee Due	Charge
	Pmt/Science Fee	Payment-Non-Deductible
	Refund/Science Fee	Refund-Non-Deductible
	Science Fee Balance	Balance
Bus Fee		
	Bus Fee Due	Charge
	Pmt/Bus Fee	Payment-Non-Deductible
	Refund/Bus Fee	Refund-Non-Deductible
	Bus Fee Balance	Balance
Prior Year		
	Prior Year Tuition Due	Charge
	Prior Year Fees Due	Charge
	Pmt/Prior Year	Payment-Non-Deductible
	Prior Year Balance	Balance
Late Charges		
	Late Charge Due	Charge
	Pmt/Late Charge	Payment-Non-Deductible
	Late Charge Balance	Balance

Volunteer/Service Hours		
	Hours Pledged	Hours Pledged
	Library Hours	Hours Completed
	Playground Hours	Hours Completed
	Teaching Assistant	Hours Completed
	Service Hours	Hours Completed
	Hours Remaining	Hours Remaining
Misc. Activities		
	Gift – Sports Equipment	Additional Gift-Deductible
	Gift – Donation to Library	Additional Gift-Deductible
	ISF Check	Ignore

Pledge Drive

Group	Activity	Function
Pledge Payments		
	Pledge Payment Due	Charge
	Pmt/Pledge	Payment-Deductible
	Initial Payment	Payment-Deductible
	Deposit	Payment-Deductible
	Payment to Reduce Rate	Pay Down-Deductible
	Non-Cash Donation	Non-Cash Contribution-Deductible
	Volunteer Credits	Credits-Non-Deductible
	Fall Dinner/Dance $20	Quid Pro Quo
	Auction & Dinner $25	Quid Pro Quo
	Pledge Balance	Balance
Volunteer/Service Hours		
	Hours Pledged	Hours Pledged
	Completed Hours	Hours Completed
	Hours Remaining	Hours Remaining
Misc. Activities		
	Church Furnishings	Additional Gift-Deductible
	Stained Glass	Additional Gift-Deductible
	ISF Check	Ignore

Extra Contributions

Group	Activity	Function
Extra Contributions		
	Missions	Payment-Deductible
	Charity & Development	Payment-Deductible
	Rice Bowl	Payment-Deductible
	Bishop’s Relief	Payment-Deductible
	Special Needs	Payment-Deductible
	Communication	Payment-Deductible
	Home Missions	Payment-Deductible
	Propagation of Faith	Payment-Deductible
	Retirement Fund	Payment-Deductible
	Emergency Fund	Payment-Deductible
	Total Extra	Group Total
Misc. Activities		
	ISF Check	Ignore

Status Icons

These icons are used within the program to indicate certain characteristics of individuals. Below are figures that show these icons as they would be displayed on the Parents/Guardians windows, the Students windows, and the Catechists windows.

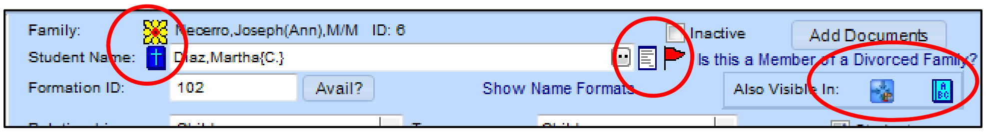

Fig. 17-1.

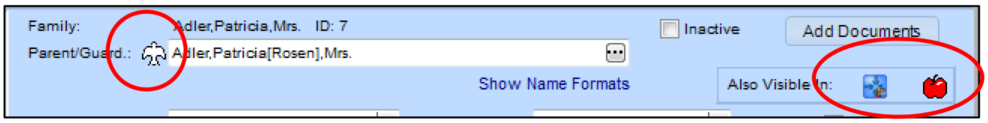

Fig. 17-2.

	Indicates the individual has a different last name than the family. Displays in the Members window beside the family's name.
	Indicates the family or individual has confidential remarks. Displays in the Families and Members windows beside the name.
	Indicates the individual has special circumstances. Displays in the Members window beside the individual's name.
	Indicates the family or individual is also in Church Office. Displays in the **Also Visible In** section of the Families and Members windows.
	Indicates the family or individual is also in School Office. Displays in the **Also Visible In** section of the Families and Members windows.
	Indicates the individual is a student in School Office. Displays in the **Also Visible In** section of the Members window.
	Indicates the individual is a teacher in School Office. Displays in the **Also Visible In** section of the Members window.
	Indicates the individual is a catechist in Formation Office. Displays in the **Also Visible In** section of the Members window.
	Indicates the individual is a student in Formation Office. Displays in the **Also Visible In** section of the Members window.

18: Answers

Chapter 1 - About Families

Exercise Instructions

Exercise #1 — Add your own family. Include the following information:

- Your name, using the Family Name dialog box.
- Your address.
- Your work phone and home phone. Indicate that the home phone is unlisted.
- Your email.
- A family keyword, such as "Receives Newsletter."

To do this

1. On the Information tab, **Families**.
2. In the Tasks group, click **Add Family**.
3. In the Add Family dialog box, click **Add New Family**.
4. In the Family Name field, start typing your last name. In the Family Name dialog box, enter the different parts of your name, then click **Apply/OK**.
5. Enter your address, city, state, and ZIP code. If your city is not in the keyword list, click **Add to the List**.
6. Enter your email address.
7. Enter your phone number and a description. If the description is not in the keyword list, click **Add to the List**.
8. Under Family Keywords, click **Insert**, and enter an appropriate keyword, such as "Receives Newsletter." If the keyword is not in the list, click **Add to the List**.

Answers to Questions

Q: What two things should not be used in ID numbers?

A: Leading zeros and letters of the alphabet.

Q: How many phone numbers can a family have?

A: A family can have an unlimited number of phone numbers.

Q: How many keywords can a family have?

A: A family can have an unlimited number of family keywords.

Q: Where can you record confidential remarks about a family?

A: In the Primary Information section of the Families window, under Remarks, select Confidential, then enter your remarks.

Q: How can you send a letter addressed directly to the family?

A: In the navigation pane of the Families window, click Individual Letter, Label.

Chapter 2 - Students

Exercise Instructions

Exercise #1 — Add a student to your family. Use the following information:

- Name — Miss Elizabeth Williams "Betsy"
- Birth date — 12/10/2003
- Grade — 3

To do this

1. On the Information tab, click **Students**.
2. In the Tasks group, click **Add Student**.
3. In the dialog box, select your family from the drop-down list, then click **Add to This Family**.
4. In the **Name** field, start typing the student's name. In the dialog box, enter the different parts of the student name, then click **Apply/OK**.
5. In the **Birth Date** field, enter **12/10/2003**.
6. In the **Grade/Degree** drop-down list, select **3**.

Exercise #2 — Add the following sacrament information for Betsy.

- She was baptized on 12/15/2003 at this parish.
- The baptism was performed by Fr. Robert Zello.
- She is sponsored by Melissa Brown, a family friend.

To do this

1. In Betsy's student record, in the navigation pane, click **Sacraments**.
2. On the Baptism tab, in the **Date** field, enter **12/15/2003**.
3. In the **Status** drop-down list, select **Yes**, then in the **Addl** drop-down list, select **Perf. Here**.
4. In the **Performed by** field, enter "Fr. Robert Zello".
5. Under Sponsors/Witnesses, enter "Melissa Brown". In the Type field, enter "Family Friend". If this type is not in the list, click **Add to the List**.

Exercise #3 — Print the Baptismal Certificate for Betsy.

To do this

1. In Betsy's Sacraments window, click the **Baptism** tab.
2. Click **Print Certificate**.
3. Select a baptismal certificate, click **Next** twice, click **Preview Report**, then **Print**.

Exercise #4 — Add an emergency contact for Betsy. Use the following information:

- Contact Name — Mrs. Esther Williams, grandmother
- Address — 123 Sugar Plum Lane, Glendale, AZ 85055
- Home Phone — (623) 545-9087

To do this

1. In the navigation pane of Betsy's student record, click **Contacts**.
2. Click **Add Contact**.
3. Click **No**.
4. In the Name field, enter "Mrs. Esther Williams".
5. In the **Relationship** drop-down list, enter or select **Grandmother**.
6. Enter the address and phone information, then click **Save**.

Answers to Questions

Q: What symbol indicates that the student has a different last name?

A: A yellow flower displays when a student has a different last name.

Q: What information can you add to the Communications window?

A: You can add student phone numbers, email addresses, and social media information. You cannot modify the other information because it displays information from the Families window. To change that information, you must go to the Families window.

Q: How many emergency contacts can a student have?

A: A student can have an unlimited number of emergency contacts.

Q: How can a student "borrow" a sibling's emergency contact?

A: When you click Add Contact, the program asks if you want to borrow a contact from a family member's record. Click Yes, select the contact you want to borrow, then click Use Marked Contact(s).

Q: What is the maximum number of sacraments that can display at once in the Sacraments window?

A: Eight, but you can display an unlimited number of sacraments on the Date List tab.

Q: Where do you change the order of the sacrament tabs?

A: On the File menu, click **Sacrament Setup > Sacrament Tab Names**.

Q: Where do you maintain the actual Sacrament Date names?

A: On File menu, click **Keywords > Student/ Parent/Guardian Keywords > Sacrament Date Names**.

Q: How do you print a Confirmation Certificate from the sacrament tab?

A: In the navigation pane of the student's record, click **Sacraments**, then on the Confirmation tab, click **Print Certificate**, and select one of the confirmation reports.

Chapter 3 – Parents & Guardians

Exercise Instructions

Exercise #1 — Fill out the information on the Parent/Guardian Personal window for the family you created in exercise #1:

To do this

1. On the Information tab, click **Parents & Guardians**.
2. If you had the check boxes selected to add Head & Spouse in the first exercise, then there should be a record already started for you. If not, in the in the Tasks group, click **Add Par/Grd**. In the dialog box, select your family from the drop-down list, then click **Add to This Family**.
3. Enter the relationship, type, gender, and birthdate.
4. Enter the martial status, grade, and other keywords. Click **Add to the List** if any of your keywords are not in the keyword list.

Answers to Questions

Q: What is the difference between a Talent, a Ministry, and a Keyword?

A: A talent is a skill.

A ministry is an area of volunteer or interest.

A keyword is a particular attribute or indication of part of a specific group.

Q: Where would you record a parent's attendance to a Sensitivity Training seminar?

A: On the Information tab, click **Parents & Guardians > Safe Environment**. In the Other Requirements section, click **Insert**.

Q: Where do you record a parent's attendance to classes associated with their student's sacraments?

A: On the Information tab, click **Parents & Guardians > Volunteer/Prep Classes**.

Chapter 4 – Class Schedules

Exercise Instructions

Create a session using the following information.

- Name: Learning the Saints
- Year/Period: 2015/2016
- Grade Level: 5th grade.
- Time: from 7pm to 9pm
- Room: Classroom 101
- Date Range: September through April
- Frequency: Every Third Wednesday of the Month

To do this

1. On the Information tab, click **Class Schedules**.
2. In the Tasks group, click **Add Class**.
3. Enter the session name and grade level.
4. In the Catechists section of the Session Information window, click **Insert**, and select a catechist.
5. Enter the time, room, and date range. Click **Add to the List** if the time and room are not in the keyword lists.
6. Click **Set Frequency**. Select **Weekly**. Select the check boxes for 'Every Third' and 'Wednesday'. Click **Add to Class Dates**.

Chapter 7 – Tuition and Fees

Exercise Instructions

Exercise #1: Set up a fund.

1. On the Administration tab, click **Fund Setup**. Click **Add Fund**.
2. Enter the following values:

    Fund Identifier: RE

    Fund Name: Religious Education

    Due Date Based on: Fund Period

    Recurring Charges: First Day

    Period: RE-14, from July 2014 to June 2015

    Goal: $20,000

3. When the program asks if you want to use predefined fund activities or make your own group, select **Make Group**.
4. Add the following group titles and activities:

    One Student Tuition

    One Student Tuition Due – Charge

    Pmt/One Student Tuition – Payment Non-Deductible

    One Student Tuition Bal – Balance

    Two Students Tuition

    Two Students Tuition Due – Charge

    Pmt/Two Students Tuition – Payment Non-Deductible

    Two Students Tuition Bal – Balance

    3 or More Students Tuition

    3 or More Students Tuition Due – Charge

    Pmt/3 or More Students Tuition – Payment Non-Deductible

    3 or More Students Tuition Bal – Balance

    Registration Fees

    Reg Fee Due – Charge

    Pmt/Reg Fee – Payment Deductible

    Reg Fee Bal – Balance

5. Click **Save**.
6. Click **Add to Fams**.

Exercise #2: Set up a family for a tuition payment of $10 each week for the entire fund period.

1. On the Information tab, click **Tuition & Fees**.
2. If you followed all steps in exercise 1, then this fund should be set up for everyone. Click **Funds Used** and select the **RE-14** fund. If you did not complete the last step in exercise 1 and this fund has not been added to this family, click **Add Fund**, then select fund **RE-14**.
3. Click **Add Rate**.
4. Select the following values:

    Recurring Act: One Student Tuition

    Terms: Weekly

    Billing Period: 7/1/2014 to 6/30/2015

    Rate: 10.00

5. Click **Save**. The total will calculate based on the rate, term, and billing period.

Exercise #3: Set up a family for a tuition payment of $50 each quarter from August 2014 to April 2015. When is the first payment due?

1. Select a different family from exercise #2.
2. Select fund **RE-14** if you completed the final step of exercise 1. Otherwise, this family does not have this fund added, and you need to add this fund. Click **Add Fund**, and select fund **RE-14**.
3. On the Rates/History/Keywds window, click **Add Rate**.
4. Select the following values:

    Recurring Act: One Student Tuition

    Terms: Quarterly

    Billing Period: 8/1/2014 to 4/30/2015

    Rate: 50.00

5. In the navigation pane, click **Recap/Totals**. Because the due dates are based on the fund period (starting in July), the first payment will be due October 1 (they missed the first fund period quarter of July-August-September).

Exercise #4: Set up a family for a tuition payment of $150 monthly, for a total of $2000. What special conditions must be made?

1. Stay on the same family as exercise #3.
2. On the Rates/History/Keywds window, click **Add Rate**.
3. Select the following values:

    Recurring Act: One Student Tuition

    Terms: Monthly

    Billing Period: 7/1/2014 to 6/30/2015

    Rate: 150.00

4. Click **Save**. The total will calculate as $1800. Change the total to $2000, and click **Save**.
5. Click **Leave Same Rate** in the dialog box that appears.
6. In reviewing the rate and total, you will see the original values of $150 per month with a total of $1800. Next to these amounts in parenthesis, you'll see ($350) for the final payment and ($2000.00) for the total. If you go to the Recap/Totals window, you will see this family has a $150/monthly tuition with a final payment of $350, totaling $2000.

Exercise #5: Set up one student of the family with a tuition payment of $20 Weekly and another student as $100 Monthly for the entire fund period. Which student's total will be higher?

1. Select a different family than in exercises 2 and 3.
2. Select fund **RE-14** if you completed the final step of exercise 1. Otherwise, this family does not have this fund added, and you need to add this fund. Click **Add Fund**, and select fund **RE-14**.
3. On the Rates/History/Keywds window, click **Add Rate**.
4. For the first student, select the following values:

   Recurring Act: One Student Tuition

   Terms: Weekly

   Billing Period: 7/1/2014 to 6/30/2015

   Rate: 20.00

5. Click **Add Rate** again. For the second student, select the following values.

   Recurring Act: One Student Tuition

   Terms: Monthly

   Billing Period: 7/1/2014 to 6/30/2015

   Rate: 100.00

6. The student paying monthly will pay more - $1200 versus $1060 for the student paying Weekly.

Exercise #6: Set up a family for a tuition payment of $100 per month, with a pay-down of $300.

1. Make sure the fund has a pay-down activity. On the Administration tab, click **Fund Setup**, then position your pointer on the One Student Tuition Bal activity, and click **Insert**. When asked if you want to insert a predefined group of activities, select **No**. A new line is inserted above the Balance activity. Enter an activity name "One Student Pmt/Reduce Rate" and select a function of **Pay Down-Non Deductible**.
2. Click **Save**.
3. On the Information tab, click **Tuition & Fees**. This should be set to the family used in exercise #5, but you can click **Next Family** in the navigation group to go to the next family. Select fund **RE-14** if you completed the final step of exercise 1. Otherwise, this family does not have this fund added, and you need to add this fund. Click **Add Fund**, and select fund **RE-14**.
4. On the Rates/History/Keywds window, click **Add Rate**.
5. Select the following values:

   Recurring Act: One Student Tuition

   Terms: Monthly

   Billing Period: 7/1/2014 to 6/30/2015

   Rate: 100.00

6. At the bottom in the History section, click **Insert** and enter this posting:

   Date: 7/1/2014

   Activity: One Student Pmt/Reduce Rate

   Amount: $300.00

7. Click **Save**. The rate now changes to $75 per month. ($100 x 12 months = $1200. $1200-300, divided by 12, = $75)
8. The rate has $75 in parenthesis, indicating the change. The total shows $1200 in parenthesis.

Answers Questions

Q: What three activity types would you need to track a Bus Fee?

A: Charge, Payment, and Balance.

Q: Can you post to fund 1-14 after fund 1-15 has been created? Why or why not?

A: Yes,because the prior fund periods are not locked or deleted when a new period is created.

Q: What is the difference between “Weekly” and “Weekly on Tuesday”? How is this distinction useful?

A: “Weekly” means every 7th day starting with the Billing Start Date. “Weekly on Tuesday” (or other day of the week) means every Tuesday (or selected day) within the billing period. This can be used to make sure you have 52 weeks in a year.

Q: What is the difference between Fund Period, Billing Period, and Calendar Year?

A: Fund Period is the named time frame on the Fund Setup window. Billing Period is the time period for the families/tuition or period the family is pledging. Calendar Year is January to December.

Q: What are the four rules for fund periods?

A:
1. Fund periods cannot overlap.
2. Fund periods should not be less than one year.
3. Fund periods can cover more than one year.
4. Fund periods do not have to begin in January.

Q: What is special about Quid Pro Quo activities?

A: The activity must have the value of the item received as part of its name.

Q: What activity type would you use to post a payment that reduces the rate but not the total pledge?

A: Pay-down deductible or Pay-down non-deductible.

Q: What activity type would you use to post stock?

A: Non-Cash contribution.

Q: What section of the Tuition & Fees window would you access to see the family’s fund status through today?

A: Recap/Totals.

Chapter 8: Quick Posting Processes

Exercise

Exercise #1: Post geographic area "1A" to all families who live in Phoenix.

1. On the Information tab, click **Families**. In the Other Tasks section of the navigation pane, click **Quick Posting**. Finally, click **Area Posting**.
2. Select **Automatic Updating**. Click Next.
3. On the Additional Selections tab, click **<Click here to add new Condition>**. Use the following selection: **Fam.City** **is equal to** **Phoenix, AZ**
4. Click **Next**. Select **Assign the Same Area to selected Families**. Enter "1A". Click **Next**.
5. After the program builds the list, click **Next**, then **Finish**.

Exercise #2: Post grade 3 to all eight-year-olds.

1. On the Information tab, click **Students**. In the Other Tasks section of the navigation pane, click **Quick Posting**. Finally, click **Grade Levels**.
2. Select **Automatic Updating**. Click **Next**.
3. On the Additional Selections tab, click **<Click here to add new Condition>**. Use the following selection: **Student.Age** **is equal to** **8**.
4. Click **Next**. Select **Assign the Same Grade Level to selected Students**. Select grade **3** from the drop-down list.
5. Click **Next**.
6. After the program builds the list, click **Next**, then **Finish**.

Exercise #3: Post a $10 late fee to families who are behind on their pledge in fund RE-14.

1. First, go to the Fund Setup window and add a group of activities for late fees. Click **Insert**. When asked if you want to insert a predefined group of activities, click **Yes**. Select the Formation predefined group, click **Clear All**, then select the **Late Charges** group which should select all activities within that group. Click **Use/OK**.
2. On the Information tab, click **Tuition & Fees**. In the Other Tasks section of the navigation pane, click **Quick Posting**. Finally, click **Post Family Fees**.
3. Select **Automatic Updating**. Click Next.
4. On the Additional Selections tab, click **<Click here to add new Condition>**. Use the following selection: **Fund Totals.Recap Balance** **is greater than** **0**.
5. Click **Next**. Select **Assign the Same fee to selected Families**. Enter the following:
   Date: today's date
   Fund Identifier: RE-14
   Fee Name: Late Charge Due
   Amount: $10.00

~~9.~~6. After the program builds the list, click **Next**, then **Finish**.

Answers to Questions

Q: Are quick postings used to update existing information or add new information?

A: Add new information.

Q: What must be set up before you can post a late fee to individual families?

A: A Late Fee group, including a Late Fee activity (charge type), a Payment of Late Fee activity (payment deductible type), and a Balance of Late Fee activity (balance type).

Q: Which quick posting would you use to assign fourteen-year-olds to a new confirmation class?

A: On the Information tab, click **Students > Quick Posting > Classes or Sessions**.

Q: Which quick posting would you use to record that students have completed Confirmation?

A: On the Information tab, click **Students > Quick Posting > Dates**.

Q: Which quick posting would you use to assess a $25 sacrament fee per student?

A: On the Information tab, click **Tuition & Fees > Quick Posting > Post Student Fees**.

Chapter 9: Processes

Exercises

Exercise #1: Make families from ID 1 to 100 inactive.

1. On the Information tab, click **Families**.
2. In the Other Tasks section, click **Processes**. Finally, click **Activate/Inactivate**.
3. Select **Automatic Updating**. Click **Next**.
4. Select **Make Families Inactive**. Click **Next**.
5. Click **<Click here to add new Condition>**. Use the following selection: **Fam.ID Number is between 1 and 100**.
6. Click **Next**. After the program builds the list, click **Next**, then **Finish**.

Exercise #2: Promote children in grades 1 through 12, marking 12th graders as **Young Adult**.

1. On the Information tab, click **Students**.
2. In the Other Tasks section, click **Processes**. Finally, click **Grade Promotion**.
3. Select **Promote both the Formation Grade and the School Grade**, and click **Next**.
4. Select **1** from the Begin Promotion with Grade drop-down list. Select **12** from the End Promotion with Grade drop-down list.
5. Select the check box labeled **Change the type for those currently in the last grade listed below from Child to Young Adult**.
6. Click **Next**. After the program builds the list, click **Next**, then **Finish**.

Exercise #3: Change the status of members with Ministry of Lector to **Actively Involved**.

1. On the Information tab, click **Students**.
2. In the Other Tasks section, click **Processes**. Finally, click **Change Ministries**.
3. Select **Only include members with this specific ministry**. Select **Lector** from the drop-down list.
4. Click **Next**.
5. Select **All Family Members**, and click **Next**.
6. Select **Post Changes for All Members**. Click **Next**.
7. Select **Assign the same changes to all selected family members**. Select **Actively Involved** from the New Status for All drop-down list.
8. Click **Next**. After the program builds the list, click **Next**, then **Finish**.

Questions

Q: Which process would you use to promote the entire 3rd Grade Formation class to the 4th Grade Formation class?

A: On the Information tab, click **Students > Processes > Automatic Class/Session Promotion**.

Q: Mrs. Finch, the Confirmation catechist, retired in the middle of the year. What process would you use to assign her classes to Mr. Novak?

A: On the Information tab, click **Students > Processes > Catechist Exchange**.

Q: Which process would you use to add 50 new students from Church Office to Formation Office?

A: On the Information tab, click **Students > Processes > Quick Add from Shared Data File**.

Q: Which process would you use to set up fund 3, Tuition, for the next school year, and add that fund period to all the families that had it last year?

A: On the Information tab, click **Tuition & Fees > Processes > New Year Fund Setup**.

Q: Which process would you use to combine duplicate family records?

A: On the File Menu, click **System Processes > Combine Families**.

Chapter 11: Reports

Questions

Q: What are the six steps to running a report?

A: Select WHAT report, settings OVERVIEW, WHERE to print, HOW it will look (layout), WHICH fund, family, student (selections), and PRINT.

Q: What are the six types of reports?

A: List, Letter, Label, Envelope, Form, and Export.

Q: How do you access reports?

A: You can access reports from different locations in the program. On the ribbon, click Information. In the navigation pane of the Families, Students, Parents & Guardians, or Tuition & Fees windows, click **Reports**. Or access all reports on the Reports tab.

The program displays the available reports for the area of the program you are currently in. To see all available reports, select All Reports.

Q: Your neighbor church has created a wonderful family listing report. How would they save the report? How would you install it?

A: To save it: go to Reports, highlight the report, and click Save as Custom Report.

To install it: go to Reports, and click **Add > Custom Report**.

Q: What is a style? How many styles can you create?

A: A style is a saved set of formatting elements, such as page style or margin style. You can create an unlimited number of styles for each type.

Q: What are Smallest Margins?

A: Smallest Margins are a special margin style that uses the maximum possible printing area, as designated by the printer driver.

Q: What is Simple Selection – Never Saved?

A: Simple Selection is a special selection type that is used when you don't want to save the selections you are about to use.

Chapter 12: Keywords

Exercises

Exercise #1: Make a new User Keyword.

1. On the File menu, click **Keywords > Student / Parent / Guardian Keywords > User Keywords > User KW 6**.
2. Enter the **Keyword Name** "Ice Cream". Select **Formation** then select the check box to appear on the Students window.
3. Click **Insert** and enter the three flavors under description. Click **Save/OK**, then **Close**.
4. On the Information tab, click **Students**. Select or enter **Strawberry** as the flavor preference on any student record, in the Personal window.
5. On the student's record, expand the Ice Cream keyword list, and click **Manage**. Replace "Strawberry" with "Cherry". Click **Save/OK**, then **Close**.
6. View the student record from step 4.

Exercise #2: Combine two keyword entries.

1. Expand the Ice Cream keyword list on the Students Personal window, and click **Manage**. Click **Insert** and enter "Black Cherry". Click **Save/OK**, then **Close**.
2. Select **Black Cherry** as the flavor preference on any student record.
3. Expand the Ice Cream keyword list on the Students Personal window, and click **Manage**. Click **Combine**.
4. Select **Black Cherry** in the Select a Keyword to Change column. Select **Cherry** in the Change it to this Keyword column.
5. Click **Add to List of Changes Below**. Click **Combine/OK**. Click **Save/OK**, then **Close**.
6. View the student record from step 2.

Exercise #3: Delete a keyword entry.

1. Expand the Ice Cream keyword list on the Students Personal window, and click **Manage**. Click **Delete**.
2. Select the check box for Cherry. Click **Delete/OK**.
3. Click **Close**.

Questions

Q: How many User Keywords are available? What windows do they appear on?

A: Twelve. Eleven can be set up to appear on the Students and Parents/Guardians Personal window, and one appears on the Families Primary Information window.

Q: How many entries can you have in each keyword list?

A: Unlimited.

Q: What are the four commands available in every keyword list?

A: Insert, Delete, Combine, and Print.

Q: What is the extra command on the Grade keyword list?

A: Re-Order.

Chapter 13: View Listings and Easy Lists

Exercises

Exercise #1: Get a list of children and young adults with different last names, showing grade and address.

1. On the Information tab, click **Students**.
2. In the navigation pane, click **Easy Lists**, then select **Different Last Names List**.
3. Select **Only Include Members with the Following Types**. Select **Young Adult** and **Child**, then click **Apply/OK**.
4. Click **Customize View**.
5. Click and drag all fields, except 'Mem Name', from **Fields you Want to View** to **Fields Available to View**.
6. Click and drag 'Mem Grade' and 'Family Address Block' from **Fields Available to View** to **Fields you Want to View**.
7. Click **Save/OK**.

Exercise #2: Get a list of single female parents between the ages of 25 and 50 and send them a letter.

1. On the Information tab, click **Students**.
2. In the navigation pane, click **Easy Lists**, then select **List of Parents**.
3. In the Gender drop-down list, select **Female**.
4. For Marital Status, select to **Only Include Parents with the Following Marital Statuses**, and then select **Single**, **Divorced**, and **Widowed**.
5. For Age, select **Include Parents of the Following Age**, then enter Start with Age of **25** and End with Age of **50**.
6. Select **Only Include Parents with Children**, then click **Apply/OK**.
7. Click **Easy Letter**. Refer to the Reports chapter of this training guide for details on modifying the text of a letter and using the report wizard.

Exercise #3: Get a list of students who are in the 1st Grade Formation class.

1. On the Information tab, click **Students**.
2. In the navigation pane, click **Easy Lists**, then select **Class List**.
3. In the Class Name drop-down list, select **1st Grade Formation**.
4. Click **Apply/OK**.

Exercise #4: Get a list of parents who have volunteered to be part of the car pool.

1. On the Information tab, click **Students**.
2. In the navigation pane, click **Easy Lists**, then select **Parent Volunteer List**.
3. In the Volunteer Area drop-down list, select **Car Pool**.
4. Click **Apply/OK**.

Questions

Q: Which main program section includes financial fields as part of its listing screen's Customize View options?

A: The Tuition & Fees listing screen.

Q: The width of a column cannot be smaller than what? How could you make it smaller?

A: Its heading. Use Customize View to change the heading.

Q: Which command button would you use to get the original columns back in an Easy List?

A: Use Default Values to get the original columns back in Easy Lists.

Chapter 14: CASS & EZ-Mail

Exercises

Exercise #1: In step 1 of the EZ-Mail feature, enter the following mailing specifications:

1. On the File menu, click **Bulk Mail / CASS > EZ-Mail**.
2. On the Step 1: Mailing Specifications tab, enter the mailing specifications.
   Zip Code: Enter the zip code of your post office or your own if you do not know theirs.
   Mailing Class: Standard-class – Non Profit
   Your Permit Number: 1234
   Date of the Proposed Mailing: 1 week from today.
   Carrier Route Trays: Yes
   Merge SCF: Yes
   Number of Pieces: 60
   Weight of a Single Piece: 0.401
   Postage Payment Method: Permit Imprint
   Postage Already on Each Piece: $0.00
   Type of Discount: DSCF

~~12.~~3. Click **Save/OK**.

Exercise #2 — Build an EZ-Mail list of student addresses. Then, in the Select Report window, under **Label/Envelope Reports in Upper Case**, run the **Student Mailing Label - Barcode at Bottom** report. Make sure you change the sort order to **EZ-Mail**.

1. On the File menu, click **Bulk Mail / CASS > EZ-Mail**.
2. Make sure you have completed the steps in exercise 1.
3. On the Step 2: Build the EZ-Mail List, click **Build a List of Student Addresses**.
4. Use the Select Students window to filter the list of students that will be included in your bulk mailing, then click **Build List**.

> **Important Note**
>
> This step does not produce labels or envelopes; it merely identifies who you want to include in the EZ-Mail list.

5. On the Information tab, click **Students**.
6. In the navigation pane, click **Reports**, or on the Reports tab, click **Student Reports**.
7. Expand the Label/Envelope Reports in Upper Case report category, then select **Student Mailing Label – Barcode at Bottom**.
8. Click **Next**, or double click the report name in the Select Report list to begin the report wizard.
9. Select the printer.
10. Set the layout.
11. On the Select Students step of the report wizard, in the Sort Order drop-down list, select **EZ-Mail**.
12. Click **Preview**.

Chapter 15: Additional Features

Exercises

Exercise #1: Change the program name to "Sue's Favorite Program", but use your own name.

1. On the Quick Access toolbar, click .
2. For Program Name, enter your name then "Favorite Program".
3. Click **Save/OK**, then **Close**.
4. Return to the Home window to view this change. On the Quick Access toolbar, click .

Exercise #2: Create a user profile for yourself, including a password. Make yourself a security administrator, and give yourself **All Access** to everything, including Individual Funds.

1. On the Administration tab, click **Users & Passwords**.
2. In the Tasks group, click **Add User**.
3. Enter your name and a password.
4. For **Security Adm.**, select **Yes**.
5. On the Access and Privileges window, click **Mark All All Access**.
6. In the navigation pane, click **Individual Fund Access**, then click **Mark All All Access**.

Exercise #3: Set the security method to ask for name and password.

1. On the Administration tab, click **Users & Passwords**.
2. In the navigation pane, click **Set Security Method**.
3. Select **The User is asked for a Name and Password**.
4. Click **Save/OK**, then **Close**.
5. You must exit the program and re-enter before this setting takes effect.

Exercise #4: Add HRH – 'Her Royal Highness' – to the Title Definitions.

1. On the File menu, click **Setup > Title Definitions**.
2. Click **Insert Abbreviations**.
3. Enter **HRH** for Abbreviation. Enter Her "Royal Highness" for mailing title and salutation title.
4. Enter "Monarchy" for description.
5. Click **Save/OK**, then **Close**.

Questions

Q: Where do you go to change the term used for tracking Service/Retreat attendance?

A: On the File menu, click **Setup > Unit Name Definition**. In the Service/Retreats Units field, enter the term you would like to use (i.e. Hours, Days, Units).

Q: Where do you maintain the names and addresses of the churches tracked in Sacraments?

A: On the File menu, click Sacrament Setup > Sacrament Place Names and Addresses.

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