
Contents

1: Funds.....	1-1
Fund Setup	1-1
Add Fund.....	1-1
Fund Information.....	1-2
Fund Periods.....	1-3
Fund Activities	1-4
Predefined Fund Setups.....	1-5
Additional Commands.....	1-6
Program Access.....	1-8
Exercise.....	1-8
Family Fund Setup	1-9
Add Fund.....	1-9
Rates/History/ Keywds.....	1-10
Recap/Totals.....	1-11
Billing Address.....	1-12
Other Tasks.....	1-12
Exercises	1-13
Questions	1-14
2: Quick Posting Processes.....	2-1
Student Posting	2-1
Family Posting.....	2-2
Tuition & Fees Posting	2-3
Common Steps in the Quick Posting Process	2-4
Automatic vs. Individual	2-4
Select the Information to Post	2-5
Review the List.....	2-6
Ready to Post.....	2-6
General Notes About the Quick Posting Processes	2-7
Quick Posting of Payments	2-7
List of Batches.....	2-7
Quick Posting Options.....	2-8
The Posting Screen.....	2-9
The Posting Grid	2-9
Saving, Posting and Printing	2-11
Exercises	2-12
Questions	2-12
3: Processes.....	3-1
Formation Processes.....	3-1
Add New Year/Period	3-2
Enrollment.....	3-3
Grade Promotion	3-6
Formation Remove/ Advance.....	3-7
Automatic Class/Session Promotion	3-8
Catechist Exchange	3-8
Student Processes.....	3-9
Active/Inactive	3-10

Change Talents and Change Ministries	3-10
Change Letters.....	3-11
Quick Add from Shared Data File.....	3-11
Quick Delete.....	3-12
Delete Family Member Remarks.....	3-13
Delete Permanent Records	3-13
Move Family Member Information	3-14
Family Processes	3-15
Kenedy Directory Information	3-16
Compare Parish Data with Diocese Mailing List	3-22
Reorder ID Numbers	3-24
Activate/ Inactivate Families	3-25
Remove Families	3-25
Delete Family Remarks	3-26
Move Family Information	3-26
Change Letters, Visits, Calls, Etc.	3-26
Tuition & Fees Processes.....	3-27
Move Fund Entries	3-28
Delete Batch	3-28
New Year Fund Setup	3-29
Carry Forward Balances	3-30
System Processes.....	3-32
Change Area Codes	3-33
Change Case of All Information.....	3-33
Change Names.....	3-34
Sacramental Registers	3-35
Preparing to Use Sacramental Register	3-35
Creating Sacrament Registers.....	3-36
Combine Families and Combine Members	3-37
After Data Merge.....	3-37
Sharing Data with Church Office	3-37
Converting from Religious Education for DOS	3-37
Combine Families.....	3-37
Combine Members	3-40
Exercises	3-41
Questions	3-41

4: Reports..... 4-1

Overview.....	4-1
Select Report Screen.....	4-3
Report Overview Screen.....	4-5
Select Printer	4-6
The Layout Screen.....	4-7
Styles	4-7
Text of a Letter	4-8
Indenting Fields.....	4-9
Printing Fields That Don't Match the Report Type.....	4-13
Multiple Languages	4-15
Select Funds to Print.....	4-17
Selections	4-18
Family or Individual Selections.....	4-19
Additional Selections.....	4-20
Condition Lines	4-21
Selection Examples	4-22
Comparing Selection Abilities.....	4-23

Report Preview	4-24
Print	4-25
Print to File	4-25
Sending Letters by Email	4-26
Logging Letters	4-28
Custom Reports	4-28
Reordering User Defined Reports	4-29
Modify the List of Fields to Print	4-31
Label Layout	4-32
Envelope Layout	4-33
Defining a Form	4-35
Exporting Data	4-36
Questions	4-37

5: Additional Features 5-1

Program Information	5-1
Screen Information	5-1
General Information	5-2
View Log of User Activity	5-3
List of Users Currently in Program	5-4
Using the Keyboard	5-5
Navigation	5-5
Keyboard Shortcuts	5-5
Undo, Cut, Copy, & Paste	5-6
Spell Check	5-6
Insert Symbol	5-6
Special Tools You Can Use Anywhere	5-7
Year at a Glance (Ctrl + Y)	5-7
Calculator (Ctrl + K)	5-8
Print Screen (Ctrl + P)	5-9
Users and Passwords	5-11
Add User	5-12
Copy Existing User	5-12
Access and Privileges	5-13
Individual Fund Access	5-13
User Preferences	5-14
Set Security Method	5-14
Setup Options	5-15
ID/Number Options	5-15
Initial Setup	5-15
Program Name	5-17
Sacrament Place Names and Addresses	5-17
Sacrament Tab Names	5-18
Title Definitions	5-18
Unit Name Definitions	5-19
E-Mail Setup	5-19
Batch Number and Tax Limits	5-20
Electronic Fund Transfer Setup	5-20
Backup and Restore	5-22
Backup Concepts	5-22
Backup Current Data	5-23
Restore Data from a Prior Backup	5-23
Setup Automatic Backup Options	5-25
Move Data to Another Computer	5-25
Schedule Automatic Backups	5-26

Test, Fix and Rescue	5-27
Test Program	5-27
Fix Utility	5-27
Rescue Program.....	5-28
Erase Data.....	5-29
Disable Passwords	5-29
Exercises	5-30
Questions	5-30

6: CASS Certification and PDS EZ-Mail..... 6-1

Overview of Bulk Mail	6-1
Understanding Bulk Mail	6-1
First Class Mail	6-1
Standard Class Mail.....	6-1
Bulk Mail Requirements.....	6-2
Getting Data Ready for Certification	6-3
Bundling, Traying, and Bringing to Post Office.....	6-3
CASS	6-4
CASSIt! Certification	6-4
Testing Addresses for Errors	6-5
EZ-Mail	6-6
Potential Savings Using EZ-Mail	6-6
Step 1: Mailing Specifications.....	6-7
Exercise	6-9
Step 2: Build the EZ-Mail List	6-10
Step 3: Print the Qualification Report	6-14
Print the Tray Labels	6-15
Step 5: Print the Postage Statements	6-16
Step 6: How to Print the Mailing.....	6-19
Step 7: Packaging, Traying and Mailing	6-21
Post Office Information.....	6-23
Meeting the USPS Move Update Requirements	6-25
Address Change Service.....	6-25
NCOA ^{Link}	6-26
FASTforward	6-27
Ancillary Service Endorsements	6-27
Exercise	6-28
Questions	6-28

7: Family Info 7-1

The Family Screen	7-1
ID Number.....	7-2
Family Name	7-3
Also Visible In.....	7-4
Active/Inactive vs. Delete	7-4
Primary Information	7-5
Other Addresses	7-6
Map Buttons	7-7
Zip Codes	7-7
Family Recap.....	7-8
Letters, Visits, Etc.	7-9
Navigation	7-10
Tasks.....	7-11
Individual Letter, Label	7-12

Keyboard Shortcuts	7-13
Exercise.....	7-13
Parents/Guardians.....	7-14
Status Icons.....	7-14
Parent/ Guardian Name	7-15
Active/Inactive vs. Delete	7-15
Personal	7-16
Phones/EMails/Addr.....	7-17
Ministries / Talents	7-18
Family Recap.....	7-19
Volunteer/ Prep Classes.....	7-19
Safe Environment	7-20
Letters, Visits, Etc.	7-21
Navigation	7-22
Tasks.....	7-23
Other Tasks.....	7-24
Deceased Members.....	7-25
Exercise.....	7-25
Questions	7-26

8: Students 8-1

The Student Screen.....	8-1
Status Icons.....	8-1
Student Name	8-2
Active/Inactive vs. Delete	8-2
Detail	8-3
Personal	8-4
Attendance.....	8-5
Phones/EMails/Addr.....	8-5
Service and Retreats	8-6
Enrollment/ Perm. Rec.	8-6
Sacraments.....	8-7
Certificates.....	8-10
Ministries / Talents	8-11
Family Recap.....	8-12
Contacts.....	8-13
Safe Environment	8-14
Letters, Etc.....	8-14
Navigation	8-15
Tasks.....	8-16
Other Tasks.....	8-17
Deceased Students.....	8-18
Exercises	8-18
Questions	8-19

9: Catechists..... 9-1

The Catechist Screen	9-1
Status Icons.....	9-1
Catechist Name.....	9-2
Active/Inactive vs. Delete	9-2
General Information	9-3
Personal	9-4
Phones/EMails/Addr.....	9-5
Schedule	9-5

Certification	9-6
Recap (of Levels)	9-6
Levels of Certification	9-6
Renewal	9-7
Recap (of Requirements)	9-7
Required, Elective, and Other Courses	9-7
Setting up Requirements	9-8
Required Courses	9-9
Elective Courses	9-9
Other Requirements	9-10
School	9-11
Attendance	9-11
History	9-12
Ministries / Talents	9-12
Family Recap	9-13
Contacts	9-14
Safe Environment	9-14
Letters, Visits, Etc.	9-15
Navigation	9-16
Tasks	9-17
Other Tasks	9-18
Deceased Catechists	9-18
Exercises	9-19
Questions	9-20

10: Class Schedules 10-1

The Class/Session Screen.....	10-1
Session Information	10-2
Class Frequency	10-3
Class Dates	10-4
Class List	10-5
Adding Students to Sessions	10-5
Navigation	10-6
Tasks	10-7
Other Tasks	10-7
Exercise.....	10-8
Questions	10-9

11: Keywords..... 11-1

Keyword Maintenance.....	11-1
Keyword Commands	11-4
Delete Keywords	11-4
Combine Keywords	11-5
Keyword Lists	11-6
User Keywords	11-21
Exercises	11-22
Questions	11-22

12: Listing Screens and Easy Lists 12-1

Listing Screens	12-1
Using the Listing Screen	12-1
Customize View	12-2
Easy Lists.....	12-5
Choose the List.....	12-5

Exercises	12-7
Questions	12-7
13: Answers.....	13-1
Chapter 1: Funds	13-1
Exercises.....	13-1
Questions	13-4
Chapter 2: Quick Posting Processes.....	13-5
Exercises.....	13-5
Questions	13-6
Chapter 3: Processes.....	13-7
Exercises.....	13-7
Questions	13-8
Chapter 4: Reports	13-9
Questions	13-9
Chapter 5: Additional Features.....	13-10
Exercises.....	13-10
Questions	13-10
Chapter 6: CASS Certification and PDS EZ-Mail.....	13-11
Exercises.....	13-11
Questions	13-11
Chapter 7: Family Info.....	13-12
Exercises.....	13-12
Questions	13-12
Chapter 8: Students.....	13-14
Exercises.....	13-14
Questions	13-15
Chapter 9: Catechists	13-16
Exercises.....	13-16
Questions	13-17
Chapter 10: Class Sessions.....	13-18
Exercise	13-18
Questions	13-18
Chapter 11: Keywords.....	13-19
Exercises.....	13-19
Questions	13-20
Chapter 12: View Listings and Easy Lists	13-21
Exercises.....	13-21
Questions	13-21
14: Appendix	14-1
Predefined Fund Setups	14-1
Church Contributions	14-1
Church Contributions with Extra Contributions.....	14-1
Stewardship	14-1
Formation	14-2
School Tuition	14-3
Pledge Drives	14-4
Extra Contributions	14-4
Keyboard Shortcuts.....	14-5
Status Icons	14-6