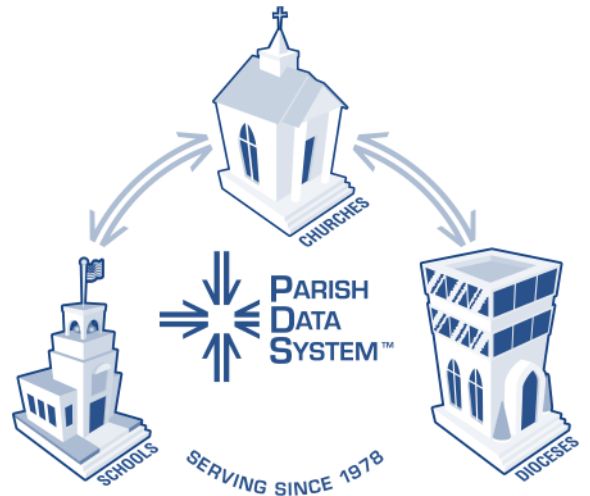


 PDS *FacilityScheduler™*

Getting Started Guide



PDS Facility Scheduler 5.1

Getting Started Guide

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Introduction

Welcome to PDS Facility Scheduler.

Overview of Facility Scheduler

Facility Scheduler lets you manage the complex scheduling tasks required for anyone who must coordinate and oversee the use of multiple parish or diocesan facilities. The program manages schedules, fees, contacts, and report analysis for the variety of physical resources in your organization.

Overview of This Guide

This *Getting Started Guide* is designed to get you working quickly with Facility Scheduler. It is not an exhaustive guide to using the application. For full instructions on using Facility Scheduler, consult the online help or the *Facility Scheduler User Guide*. Access these by clicking **Help** in the application menu bar. The *Getting Started Guide* includes the following sections:

Preparing to Install — Includes system requirements and operating system configurations needed before installing.

Upgrading from Facility Scheduler Version 1, 2, 3, or 4 — Includes installation instructions for upgrading to version 5.1.

Installing as a New or Other User — Includes installation instructions for new users, or those installing on a new machine but using an existing backup database.

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Performing Basic Tasks — Includes instructions for performing some common tasks.

Increasing Network Performance — Includes tips for speeding up a slow network after you install your PDS product.

Note — This guide often refers to your program's *User's Guide* or online help for additional information. You can find both of these by clicking **Help** on the program's menu bar.

2

Preparing to Install

Before installing, make sure you have the required hardware, software, and software configurations on the machines that will house the PDS application files or the PDS database. Instructions for checking your hardware specifications, configuring your hardware and operating system, and installing any required third-party software follow the system requirements table below.

System Requirements

The requirements for Facility Scheduler include:

Requirement	Minimum	Recommended
Operating System	Microsoft® Windows Vista™, XP SP (Service Pack) 2, 2003 SP1.	
Processor	Intel® Pentium® processor or equivalent.	1.5 GHz processor or higher.
Memory	256 MB.	1 GB.
Monitor	VGA color monitor (800 x 600 pixels or higher).	

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Requirement	Minimum	Recommended
Available Disk Space	150 MB. More storage might be required depending on the number of records you track. PDS products create data backups automatically; these backups require additional space.	
Multimedia Player	Adobe® Flash® Player (latest version).	
PDF Reader	Adobe Reader® (latest version).	
Additional Storage Devices	CD-ROM drive for installation of the PDS software.	A CD-RW, DVD-RW, USB Flash drive, or other high-capacity, removable media device to which Windows® assigns a drive letter is ideal for storing data backups.
Printer		Windows-supported laser or ink-jet printer.
E-mail Program		Microsoft Outlook, or similar.

Checking Your Hardware and Media Player Status

You can view much of the hardware information for your machine in the System Properties window. To locate it, click the Windows **Start** button, select **Control Panel**, then double-click **System**.

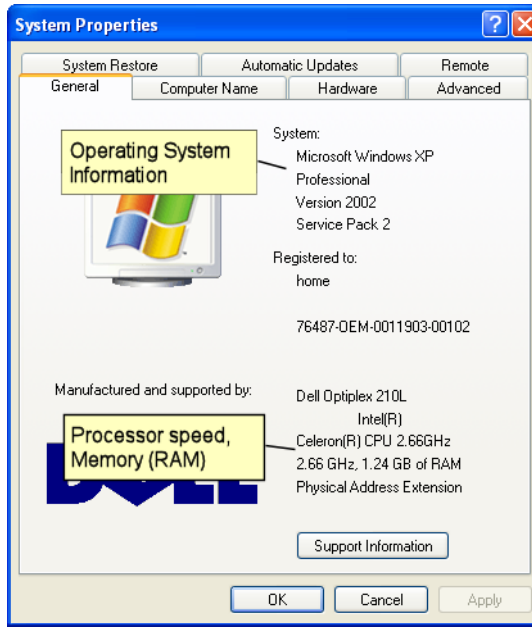


Figure 2.1 System Properties window

To check for available disk space, open Windows Explorer and locate the drive that will house the PDS software. Right-click the drive name and select **Properties**. Windows displays the amount of free disk space.

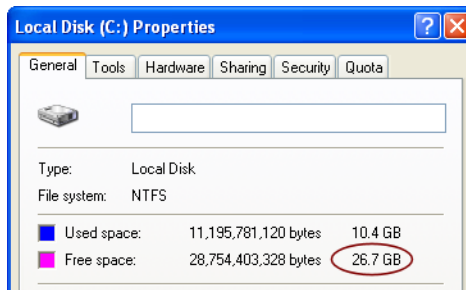


Figure 2.2 Available disk space

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To see if Adobe Reader and Adobe Flash Player are installed, click the Windows **Start** button, select **Control Panel**, then double-click **Add or Remove Programs**. Wait as Windows populates the pane. Scroll through the list to see if the programs are included.



Figure 2.3 Adobe Reader and Flash Player installed

If Adobe Reader is not installed, you can download it at the following URL:
<http://www.adobe.com/products/acrobat/readstep2.html>

If Adobe Flash Player is not installed, you can download it at the following URL:
http://www.adobe.com/shockwave/download/download.cgi?P1_Prod_Version=ShockwaveFlash&promoid=BIOW

Server Configuration Prerequisites

Before installing your PDS product, configure the server that will house your database. This section does not apply if you are running the PDS application and data on a single, standalone machine.

To configure your database server for installation

1. Make sure that your operating system includes the latest updates and patches. You can download these at the appropriate manufacturer's Web site:
 - **Microsoft:** If you have not done so, download the latest service pack and any recommended security patches at <http://windowsupdate.microsoft.com/>.
 - **Novell@:** Get the latest updates for your system at <http://support.novell.com/filefinder/6385/index.html>.
 - **Linux:** Though not specifically supported, some users house their PDS database on a Linux machine. The machine must be running Samba 3.x or higher. You can get the latest updates at <http://samba.org>.

Server Configuration Prerequisites

2. Make sure your machine supports long file names. Windows versions supported by PDS support long file names by default. You can check this by creating a file on your hard drive with more than eight characters (not including the three-letter extension). If the system accepts the name without truncating it, it supports long file names. If your operating system does not support long file names, contact the manufacturer's support division to find out how to enable it.
3. Create a folder on the server to house your data. You can choose, for example, **PDSFacilityScheduler**. Note: You should not attempt to configure Facility Scheduler to share a database with other applications, even other PDS applications. Facility Scheduler can share data with PDS Church Office or export its data to a file that can be shared with other programs, but these procedures should be performed from within Facility Scheduler. See the *Facility Scheduler User Guide* for more information.
4. Share the folder you just created so workstations can access it. Authorized users must have complete user access rights to the folder (Full Control, Modify, Read and Execute). If you are using Windows XP and the server is part of a workgroup, disable the simple file sharing. From Windows Explorer, select **Tools**, then **Folder Options**. On the **View** tab, clear **Use Simple File Sharing**. If your operating system has both a **Sharing** and a **Security** tab in the directory Properties window, you might need to set up access on both.
5. Make a note of the new folder's UNC path. A UNC path includes server, volume, directory, and file names. A typical path is `\\<servername>\PDSFacilityScheduler`. Later in the installation process, you will need to point workstations to this directory, so it must be a path recognized elsewhere on the network. It cannot be a local path.
6. Disable opportunistic locking (also called file caching). If you installed the PDS application on the same machine that houses your data, this is not necessary. The PDS product's installation process disables file caching automatically. For instructions on doing this manually, use the following online resources:
 - **Windows 2000, XP, and 2003:**
<http://support.microsoft.com/default.aspx?scid=kb;en-us;296264>
 - **WindowsNT:** <http://support.microsoft.com/kb/129202/en-us>
 - **Novell:**
<http://support.novell.com/cgi-bin/search/searchtid.cgi?10085899.htm>
 - **Linux (using Samba):**
http://samba.org/samba/docs/man/Samba-HOWTO-Collection/lockin_g.html

Note — After you disable opportunistic locking or install the program, restart the server.

Workstation Configuration Prerequisites

Configure the workstations on which you will install your PDS product. This section also applies to the server housing your PDS database if that server runs the PDS application.

To configure a workstation for installation

1. Log on to the workstation with administrator rights.
2. Install the latest Windows updates, including the latest service pack and any recommended security patches, at <http://windowsupdate.microsoft.com/>.
3. Temporarily disable your anti-virus program.
4. Close all running programs.

3

Upgrading from Version 1, 2, 3, or 4

This chapter is for customers who are upgrading to Facility Scheduler version 5.1 on a machine or network that previously ran Facility Scheduler version 1, 2, 3, or 4. This chapter assumes you will continue to house your data in the same location as before. The new PDS program updates your data to the version 5.1 format automatically. All other customers should proceed to “Installing” on page 13.

Once you are sure your hardware and operating system meet the necessary requirements, you can install your PDS product. Before beginning the installation process, make sure you know how your workstations access your PDS database. You might have a single, standalone machine that stores both the PDS program files and the database. On the other hand, you might have multiple workstations running one or more PDS products but sharing a single database. If this is the case, you should find out the network location of the database before you upgrade each workstation.

Installing Your Facility Scheduler Upgrade

Follow this procedure to upgrade to Facility Scheduler version 5.1.

Caution — Do not set up Facility Scheduler to share the database of another program, even another PDS program. This could corrupt both databases. You can share data with PDS Church Office or export data to a third-party file format that can be shared with other programs. These procedures can be performed once Facility Scheduler is installed, and are explained in the *Facility Scheduler User Guide*.

To upgrade to Facility Scheduler 5.1

1. Insert the installation CD into your machine's CD drive.
2. Click **Setup Facility Scheduler**. The Welcome page of the setup wizard opens.
3. Click **Next**. The Select Destination Folders page of the wizard opens.
4. In the **Program Folder** field, enter the path to the location where your program files will be located. Typically, you can accept the default location, C:\PDSShd.
5. In the **Data Folder** field, enter the path to the location where your existing data files are located. This could be a local directory or a network location where you share data with other workstations. If you are unsure of the location, open the existing version on a workstation. In the menu bar, select **Help**, then **About Facility Scheduler**. Note the **Data Path** location. Use this as your data folder. If it is a location not on your local machine, make sure you enter a network path that is valid from your workstation.
6. Click **Next**. Wait as the wizard installs the files. When complete, a notification page opens.
7. Click **Finish**.
8. Click **Exit**.
9. Launch the upgraded version of Facility Scheduler.
10. The new version automatically begins the upgrade of your existing database. **Do not try to interrupt this process**. An update message displays while you wait: "Parish Data System Facility Scheduler. Updating Data to 5.1..."

After Installing

If you encounter problems after installation, perform the following post-installation steps:

Post installation tasks

1. Restart and reconfigure your anti-virus software. Include the PDS database as a folder the anti-virus software should ignore. This is the folder that contains the Backup, Data, Empty, Sample, Lock, Update, and TempData folders. Ignore the subfolders of the database as well.

2. Ensure that your server's anti-virus software is not also scanning workstations, assuming your workstations' anti-virus software performs this task already.
3. Ensure that write-behind caching is enabled. To do so, open Windows Explorer. Right-click the PDS drive. Select **Properties**. Click the **Hardware** tab. Select the appropriate disk, and click **Properties**. Select the **Policies** tab (in Windows XP and 2003) or **Properties** (in Windows 2000). If it is not already checked, select **Enable write caching...** If you change the status of the check box, restart the machine.
4. Verify the settings in the BDE (Borland® Database Engine) Configuration Utility. In Windows Explorer, open the **Program Files** directory, **Common, Borland Shared**, then **BDE**. Locate and double-click the file **BDEADMIN.EXE**. Select the **Configuration** tab. Expand the nodes **Configuration**, then **System**. Select the **INIT** node. In the right-hand pane, verify that the PDS program installation process set the following values:

- LOCAL SHARE=TRUE
- MAXFILEHANDLES=250
- SHAREDMEMSIZE=4096
- MAXBUFSIZE=32768
- MEMSIZE=64
- MTS POOLING=TRUE

If your settings do not match, a pre-existing BDE program such as Corel® or WordPerfect® has installed its own version of BDE. In this case, uninstall the conflicting program, reinstall the PDS program, then reinstall the conflicting program. Both should be able to use the PDS BDE.

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Installing

Once you are sure your hardware and operating system meet the necessary requirements, you can install your PDS product. Before beginning the installation process, make sure you know how your workstations will access the PDS database. You might have a single, standalone machine that stores both the PDS program files and the database. On the other hand, you might have multiple workstations running Facility Scheduler but sharing a single database. If this is the case, find out the network location of the database before you install your PDS program on each workstation.

Installing Facility Scheduler

Follow the procedure below to install Facility Scheduler.

To install Facility Scheduler

1. Insert the Facility Scheduler installation CD into your machine's CD drive. The installer program opens automatically.
2. From the Main Menu window, click **Setup Facility Scheduler**. The Welcome page of the setup wizard opens.
3. Click **Next**. The Select Destination Folders page of the wizard opens.
4. In the **Program Folder** field, enter the path to the location where your program files will be located. Typically, you can accept the default location, C:\PDSShd.
5. In the **Data Folder** field, enter the path to the location where your data files will be located.

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6. Click **Next**. Wait as the wizard installs the files. When complete, a notification page opens.
7. Click **Finish**.
8. Click **Exit**.

After Installing

If you encounter problems after installation, perform the post-installation steps below.

Post installation tasks

1. Restart and reconfigure your anti-virus software. Include the PDS database as a folder the anti-virus software should ignore. This is the folder that contains the Backup, Data, Empty, Sample, Lock, Update, and TempData folders. Ignore the subfolders of the database as well.
2. Ensure that your server's anti-virus software is not also scanning workstations, assuming your workstations' anti-virus software performs this task already.
3. Ensure that write-behind caching is enabled. To do so, open Windows Explorer. Right-click the PDS drive. Select **Properties**. Click the **Hardware** tab. Select the appropriate disk, and click **Properties**. Select the **Policies** tab (in Windows XP and 2003) or **Properties** (in Windows 2000). If it is not already checked, select **Enable write caching...** If you change the status of the check box, restart the machine.
4. Verify the settings in the BDE (Borland® Database Engine) Configuration Utility. In Windows Explorer, open the **Program Files** directory, **Common, Borland Shared**, then **BDE**. Locate and double click the file **BDEADMIN.EXE**. Select the **Configuration** tab. Expand the nodes **Configuration**, then **System**. Select the **INIT** node. In the right-hand pane, verify that the PDS program installation process set the following values:
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5

Performing Basic Tasks

This chapter guide you through opening Facility Scheduler and performing some common tasks.

Launching and Navigating Facility Scheduler

After you first launch PDS Facility Scheduler, you can subsequently open the program and go quickly to the home page.

To open Facility Scheduler

1. On the Windows taskbar, click **Start**, point to **All Programs**, point to **Parish Data System**, and click **Facility Scheduler**.
2. Depending on your setup, you might be asked for a **User Name**, **Password**, or both.
3. The Facility Scheduler window opens to the home page.
4. Notice both the menu bar at the top of the window and the main menu on the left side. All of the main menu commands are duplicated in the **File** menu in the menu bar. You can use either method to navigate Facility Scheduler.

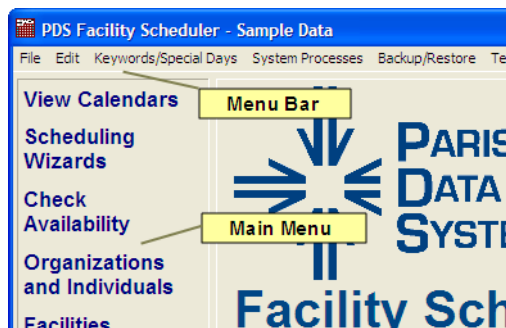


Figure 5.1 Menu bar and main menu

Adding an Organization

Organizations are the groups who use your facilities. Examples include adult confirmation, baptism preparation, Knights of Columbus, American Legion, the women's circle, prayer groups, and the finance committee. Once these entities are set up in Facility Scheduler, you will be able to schedule the resources they use throughout the year.

To add an organization

1. On the main menu, click **Organizations and Individuals**, then **Organization Detail**.
2. Click **Quick Lookup** (see following section) to make sure the organization has not already been added.
3. Click **Add Organization**.
4. Enter the **Organization** name.
5. Enter an **Abbreviation** of 12 or fewer alphanumeric characters.
6. Click **Save**. For a description of all the fields on this tab, see "Organization Detail" in the *Facility Scheduler User Guide* or online help.

Using Quick Lookup

Use Quick Lookup to locate a specific organization in the database.

To use Quick Lookup

1. Click **Organizations and Individuals**, then **Organization Detail**.
2. Click **Quick Lookup**.
3. Enter or select any information you have: Organization Name, Abbreviation, Contact Name, or Phone Number.

4. Click **Lookup/OK**.
5. If a matching record is located, the program closes the dialog box and displays the record.

Adding a Facility or Facility Group

Next, you need to set up the facilities you will schedule. Among the data you can associate with facilities once you have added them, include addresses, contacts, features (such as seating capacity, kitchen, conference equipment, etc.), charges for use of the facility, and larger facility groups that you may want to create and sub-divide into individual facilities. Finally, you can view usage schedules and create reports for your facilities.

To add a facility or facility group

1. Click **Facilities** on the main menu, then the **Facility Detail** tab.
2. To make sure the facility hasn't already been added, use **Quick Lookup**.
3. Click **Add Facility**.
4. Enter a **Facility Name** and **Abbreviation**.
5. If adding a facility group, click the **Subgroups** subtab on the **Facility Detail** tab. Click **Insert** and add a facility from the drop-down list. Repeat for each facility.
6. Enter any of the additional information you have, and click **Save**. At this point, if you created a group with subgroups, the **Fac Name** tab changes to **Group Name**. For a description of all the fields on this tab, see "Facility Detail Tab" in the *Facility Scheduler User Guide* or online help.

Schedule Simple Events

Use this wizard to schedule events that do not have a recurring pattern.

To schedule simple events

1. From the main menu, click **Scheduling Wizards**, then **Simple Events**.
2. Enter the **Organization** or select it from the drop-down list.
3. Enter the **Facility** or select it from the drop-down list.
4. Depending on whether charges will apply to this event, select **Yes** or **No** for **Will Charges Apply?** You will set up charges later in the wizard.
5. Depending on whether requirements exist that must be met before or after the event, select **Yes** or **No** for **Are There Requirements?** You will set up requirements later in the wizard.
6. Enter the **Event Time** range or click the clock icon to select it. Also enter additional time, if any, needed for **Setup** and **Cleanup**.

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7. Enter the **Specific Dates** for the event, or click the calendar icon to select them. The dates display in the calendar and list on the left side of the window. If conflicts exist, they display in red.
8. Click **Next**.
9. If you indicated that charges apply, select how to apply them. Enter items in the **Description** field and the **Amount** for each. You can also select charges from the drop-down list. If you enter a charge not in the list, the program lets you add it. Click **Insert** for each new charge. Click **Next**.
10. If you indicated there are requirements, select how to apply them. Enter items in the **Requirements** field. You can also select requirements from the drop-down list. If you enter a requirement not in the list, the program lets you add it. Click **Insert** for each new requirement. Click **Next**.
11. Edit the calendar print name, if necessary.
12. Optionally, select how you should be reminded of the event, and enter any remarks you need to add.
13. Select the calendars on which the event should appear, and how the event should be noted on printed calendars.
14. Click **Next**.
15. Click **Schedule** to complete the process.
16. Click **Next**. Use the final screen to print an event list or letter.
17. Click **Finish** to close the wizard.

For a complete description of all the pages and fields in this wizard, see “Schedule Simple Events” in the *Facility Scheduler User Guide* or online help.

View a Monthly Calendar

Use this view to see the monthly calendar of events.

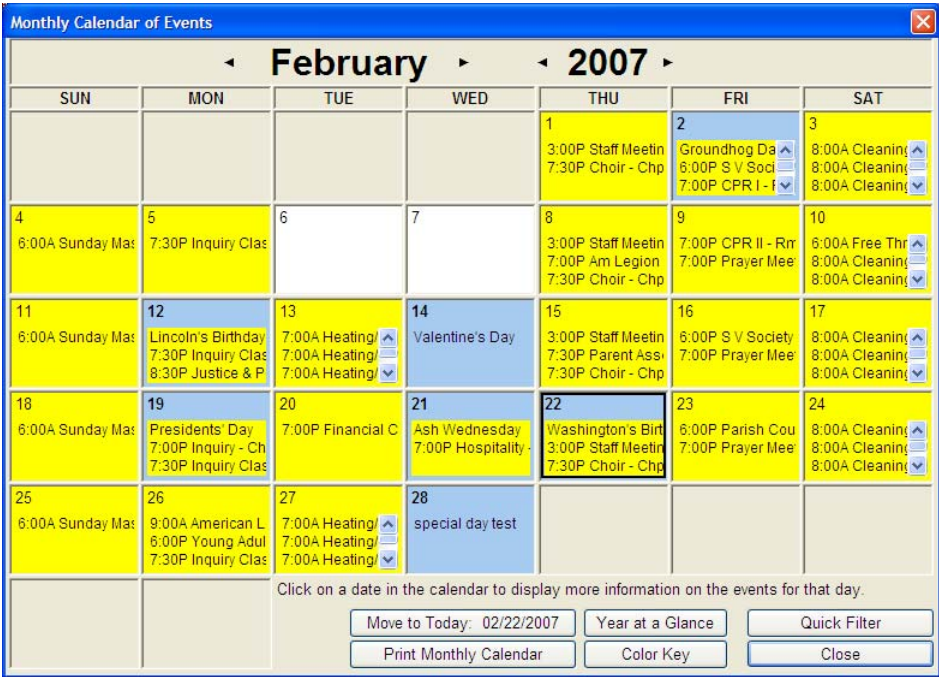


Figure 5.2 Monthly Calendar of Events window

To view a monthly calendar

1. From the main menu, click **View Calendars**, then **Monthly Calendar**. By default, the current month's calendar displays.
2. Use the buttons at the bottom of the window to help locate your events or print the calendar.
3. Double-click any day to view its details. Choose **Show List** or **Show Detail** depending on the level of information required. Click **Close** to return to the calendar.
4. When finished, click **Close**.

For a complete description of this window and of the other types of calendar views, see "View Calendars" in the *Facility Scheduler User Guide* or online help.

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Increasing Network Performance

Consider the following if, after installing your PDS program, you notice a decrease in network performance.

- Check and, if necessary, reconfigure your anti-virus software. Include the PDS database as a folder the anti-virus software can ignore. This folder contains the Backup, Data, Empty, Sample, Lock, Update, and TempData folders. Ignore subfolders of the database as well.
- Verify that your server's anti-virus software is not scanning workstations if the workstations' software already performs this duty.
- If network performance slows after installation, reboot the entire network (server, switches, hubs, routers, and workstations). If the network speeds up only temporarily, you might need to locate a specific hardware issue. Reboot each device on the network individually. After each reboot, re-launch the program. This might let you locate and troubleshoot a problem device.
- Do not attempt to run your PDS program over a wireless network. The data transfer rates are likely too slow.
- Avoid mixed network protocols. Ideally, use only TCP/IP.
- Avoid periods in paths when creating folders. Some Windows programs will interpret this as an IP address and spend unnecessary time trying to locate it as such.
- Avoid Internet "speed-tweaking" utilities.
- Disable screen savers on the server.

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