

# Report Comparison: PDS Formation Office Management Vs PDS Religious Education

These report comparison charts are designed to assist those of you who were users of the PDS Religious Education program. Report menus in PDS Formation Office have been reorganized and some report names have been changed. These comparison charts should make it easier for you to find your “favorite” reports.

The following report comparisons will have the Report menus for the new PDS Formation Office Management program in the column on the left. Reports are listed in the order they appear on the Report menus. The columns on the right will have the Path, Report Name and Filename from the PDS Religious Education program.

There is another printout of comparisons that will have the report menus from the PDS Religious Education program with the Path, Report Name and Filename in the column on the left. The column on the right will give you the path to these reports in the new PDS Formation Office program.

## PDS Formation Office Management

## PDS Religious Education Program

### Family Reports

<u>Listing Reports</u>	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Family Quick Listing	R-F-B	Basic	(FAMQUICK)
Family Basic Listing	R-F-Q	Quick	(FAMBASIC)
Family Complete Information	R-F-F	Full	(FAMFULL)
Family Contact Report			New
Family Directory	R-F-D	Directory	(FDIR2)
Family Directory with Pictures			New
Family Roster	R-F-3	Family Roster	(FAMROST)
Family Registration Form	R-F-1	Reenrollment Form	(FAMENROL)
Family Blank Registration Form	R-F-2	Blank Enrollment Form	(FAMBLANK)
Abbreviated Registration Form			New
Abbreviated Blank Registration Form			New
Family Statistical Information	R-F-N	Number	(FAMNUM)
Family Count	R-F-C	Count	(FAMCOUNT)

### Letters/Statements

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Family Welcome Letter	R-F-W	Welcome	(FAMWEL)
Family Schedule Letter	R-F-S	Schedule	(FAMSCHEd)
Anniversary Letter			New

### Label/Envelope Reports

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Family Mailing Label	R-F-L	Labels/Envelopes	(FAMLABEL)
Family Mailing Label – Barcode on Top			New
Family Mailing Label – Barcode on Bottom			New
Family Mailing Envelope			New
Family Mailing Envelope – Barcode on Top			New
Family Mailing Envelope – Barcode on Bottom			New

### Rolodex/Index Cards

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Family Rolodex	R-F-R	Rolodex	(FAMROLO)

### Family Easy Reports

	R-F-E	Easy	(FAMEASY)
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## PDS Formation Office Management

## PDS Religious Education Program

### Financial Reports

<u>Listing Reports</u>	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Fund History	R-A-H	History	(FINHIST)
Fund Activity Report	R-A-A	Activity	(FINACT)
Delinquency Report	R-A-D	Delinquency	(FINDELIN)
One Line Family List with Total			New
One Line Posting Report by Batch Number			New
Listing in Order by Amount			New
Volunteer Hours Listing			New
Financial Totals Report by Family	R-A-S	Summary	(FINSUM)
Comparison of Monthly Totals Paid or Due			New
Comparison of Yearly Totals Paid or Due			New
Pledge Drive Status Report			New
Tuition and Fees Report			New
Blank Pledge Worksheet			New
Blank Tuition Worksheet			New
Totals Report by Family (9 Funds)			New

### Financial Statements

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Billing Statement	R-A-M	Monthly	(FINMONTH)
Statement of Weekly & Activity Totals			New
Charges & Payments with Return Coupon			New
Statement with Recap of Activities			New
Quarterly Totals on Statement Mailers			New
Perforated Coupons to Make Booklet			New
Addresses on Coupon Booklet Covers			New
Letter to Those Pledging			New
Past Due Notice	R-A-N	Notice	(FINNOTE)
Letter to Those Pledging – 2 <sup>nd</sup> Notice			New

### Label/Envelope Reports

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Family Mailing Label	R-A-L	Labels	(FINLABEL)
Family Mailing Label – Barcode on Top			New
Family Mailing Label – Barcode on Bottom			New
Family Mailing Envelope			New
Family Mailing Envelope – Barcode on Top			
Family Mailing Envelope – Barcode on Bottom			

### Tax Reports

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Monthly Donor Substantiation			New
End of Year Donor Substantiation	R-A-Y	Yearly	(FINEOY)
List of Cash Contributions Over Limit			New
List of Non-Cash Contributions			New
List of Quid Pro Quo Contributions			New
Receipt for Donations/Payments			New

### Financial Analysis Reports

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Financial Comparisons by Week & Year			New
Breakdown of Funds by Amount Range			New
Monthly, Quarterly, Yearly Comparison			New
Frequency of Contributions/Payments			New
Weekly Breakdown by Amount Categories			New
Fam/Mem Fund Breakdown by Amount Range			New

## PDS Formation Office Management

## PDS Religious Education Program

<u>Financial Analysis Reports (cont)</u>	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Summary of Grand Totals by Fund			New
Summary of Delinquency by Fund			New
Pledge Group Statistics by Amounts			New
Summary of Increases & Decreases by Year			New
Increases & Decreases by Group			New

**Financial Easy Reports** R-A-E Easy (FINEASY) & (FINEZLTR)

### **Student Reports**

<u>Listing Reports</u>	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Student Quick Listing	R-S-Q	Quick	(STUQUICK)
Student Basic Information Form	R-S-B	Basic	(STUBASIC)
Student Complete Information Form			New
Student Emergency Information Form	R-S-3	Emergency	(STUEMERG)
Student Contact Listing			New
Student Attendance Listing	R-S-A	Absent/Present	(STUATTN)
Student Dates List	R-S-D	Dates	(STUDATE)
Student Schedule Listing	R-S-S	Schedule	(STUSCHED)
Student Statistical Information	R-S-N	Numbers	(STUNUM)
Student Registration Form			New
Student Blank Registration Form			New
Student Attendance Sheet	R-S-1	Attendance Sheets	(STUATTN)
Student Class/Session List	R-S-2	Class List	(STUCLASS)
Student Grade Level Listing	R-S-G	Grade List	(STUGRADE)
Student Count	R-S-C	Count	(STUCOUNT)
Student Retreat/Service Listing			New

### **Letters**

<u>Label/Envelope Reports</u>	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Student Mailing Label	R-S-L	Labels	(STULABEL)
Student Mailing Label – Barcode on Top			New
Student Mailing Label – Barcode on Bottom			New
Student Mailing Envelope			New
Student Mailing Envelope – Barcode on Top			New
Student Mailing Envelope – Barcode on Bottom			New

<u>Rolodex/Index Cards</u>	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Student Rolodex	R-S-R	Rolodex	(STUROLO)
Student Emergency Rolodex	R-S-4	Emergency Rolodex	(STUROLEO)

<u>Student Sacramental Notification</u>	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Student Request for Baptismal Record	R-S-P	Parish Labels & Notices	(STUPARIS)
Student Baptism Church Label	R-S-P	Parish Labels & Notices	(STUPARIS)
Student Notification of First Eucharist	R-S-P	Parish Labels & Notices	(STUPARIS)
Student Notification of Confirmation	R-S-P	Parish Labels & Notices	(STUPARIS)

**Student East Reports** R-S-E Easy (STUEASY) & (STEZLETR)

## PDS Formation Office Management

## PDS Religious Education Program

### Catechist Reports

#### Listing Reports

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Catechist Quick Listing	R-T-Q	Quick	(TEAQUICK)
Catechist Basic Information	R-T-B	Basic	(TEATBASIC)
Catechist Complete Information	R-T-F	Full	(TEAFULL)
Catechist Emergency Information	R-T-E	In An Emergency	(TEAEMERG)
Catechist Contact Listing			New
Catechist Registration Form	R-T-T	Teacher Enrollment	(TEAENROL)
Catechist Blank Registration Form	R-T-2	Blank Enrollment	(TEABLANK)
Catechist Directory	R-T-D	Directory	(TEADIR)
Catechist Directory with Pictures			New
Catechist Count	R-T-C	Count	(TEACOUNT)
Catechist Schedule List	R-T-S	Schedule	(TEASCHED)
Catechist Further Education Worksheet			New
Catechist Further Education Information	R-T-1	Certification	(TEACERT2)
Catechist Statistical Information	R-T-N	Number	(TEANUM)
Catechist Class/Session List	R-T-3	Class List	(TEAClass)

#### Letters

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Catechist Schedule Letter			New

#### Label/Envelope Reports

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Catechist Mailing Label	R-T-L	Labels	(TEALABEL)
Catechist Mailing Label – Barcode on Top			New
Catechist Mailing Label – Barcode on Bottom			New
Catechist Mailing Envelope			New
Catechist Mailing Envelop – Barcode on Top			New
Catechist Mailing Envelop – Barcode on Bottom			New

#### Rolodex/Index Cards

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Catechist Rolodex	R-T-R	Rolodex	(TEAROLO)

#### Catechist Easy Reports

		Easy	(TEAEASY) & (TEAEZLTR)
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### Parent/Guardian Reports

#### Listing Reports

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Parent/Guardian Quick Listing	R-G-Q	Quick	(GRDQUICK)
Parent/Guardian Basic Listing	R-G-B	Basic	(GRDBASIC)
Parent/Guardian Volunteer Area Listing	R-G-V	Volunteer	(GRDVOL)
Parent/Guardian Student Class Info	R-G-F	Family Classes	(GRDCLASS)
Parent/Guardian Prep Class Listing	R-G-P	Prep Classes	(GRDPREP)
Parent/Guardian Statistical Information			New
Parent/Guardian Count	R-G-C	Count	(GRDCOUNT)

#### Letters/Statements

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Parent/Guardian Volunteer Letter			New

#### Label/Envelope Reports

	<u>Path</u>	<u>Report</u>	<u>Filename</u>
Parent/Guardian Mailing Label	R-G-L	Labels	(GRDLABEL)
Parent/Guardian Mailing Label – Barcode on Top			New
Parent/Guardian Mailing Label – Barcode on Bottom			New
Parent/Guardian Mailing Envelope			New

## **PDS Formation Office Management**

## **PDS Religious Education Program**

<b><u>Label/Envelope Reports (cont.)</u></b>	<b><u>Path</u></b>	<b><u>Report</u></b>	<b><u>Filename</u></b>
Parent/Guardian Mailing Envelope – Barcode on Top			New
Parent/Guardian Mailing Envelope – Barcode on Bottom			New

### **Parent/Other Member Easy Reports**

New

### **Class Reports**

<b><u>Listing Reports</u></b>	<b><u>Path</u></b>	<b><u>Report</u></b>	<b><u>Filename</u></b>
Class/Session Quick Listing	R-C-Q	Quick	(CLAQUICK)
Class/Session Complete Listing	R-C-F	Full	(CLAFULL)
Class/Session Exception Dates List			New
Class/Session Count	R-C-G	Count	(CLACOUNT)
Class/Session Chronological Listing			New

### **Class Easy Reports**

New

### **Certificates**

<b><u>User Certificates</u></b>	<b><u>Path</u></b>	<b><u>Report</u></b>	<b><u>Filename</u></b>
Baptism	R-D-P	Print Cert	(MDCERTIF)
1 <sup>st</sup> Communion	R-D-P	Print Cert	(MDCERTIF)
Confirmation	R-D-P	Print Cert	(MDCERTIF)
Baptism using Preprinted Form	R-D-P	Print Cert	(MDCERTIF)
1 <sup>st</sup> Communion using Preprinted Form	R-D-P	Print Cert	(MDCERTIF)
Confirmation using Preprinted Form	R-D-P	Print Cert	(MDCERTIF)