User’s Guide to the

PDS Formation Office Management Demo Program

By Parish Data System, Inc.
1: Introduction

Chapter Overview

Parish Data System (PDS) welcomes you as a user of their Formation Office Management Demo program. We have been developing quality software since 1978 and we feel that this program is the answer to every organization’s religious education needs.

This chapter introduces you to the PDS Formation Office Management program and explains the conventions used in this manual. It will also tell you where to receive program support and also how to receive support for your network and printers.

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Typographical Conventions Used in this User’s Guide

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<td><strong>Bold</strong> type</td>
<td>The button or tab to click or what to type.</td>
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<td><strong>Scheduling Wizards</strong>| <strong>Simple Events</strong></td>
<td>A sequence of buttons and/or tabs to click.</td>
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<td><strong>Upper and Lower Case Letters</strong></td>
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<td><strong>Italic</strong> type</td>
<td>Emphasis given to a particular statement.</td>
</tr>
<tr>
<td>Date styles</td>
<td>Dates in the documentation are represented as MM/DD/YYYY, MM/YYYY or MM/D/YYYY. Dates in the program display in the style set up under your Windows Regional Settings. However, if set to M/D/YYYY in Windows, it displays as MM/DD/YYYY in PDS programs.</td>
</tr>
<tr>
<td>Key + Key</td>
<td>Key combinations for which the user must press and hold down one key and then press another. For example, for Ctrl + P press and hold the Ctrl key down while pressing the letter P.</td>
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We feel that the PDS Formation Office Management program will be the solution to the time-consuming processes of scheduling students and catechists, updating religious education involvement and completion, tracking tuition and fees, and printing reports.

- If you were using an earlier version of the PDS Religious Education program (Version 1) or the PDS Census/Contribution program (Version 17), there is an automatic data conversion process included with the program that allows you to start using the program right away with your existing data. (This feature is not available in the Demo program.)

- The PDS Formation Office Management program can be setup to share its data with the PDS Church Office and/or PDS School Office Management programs. This allows the common family and member data to be shared between the programs. (This feature is not available in the Demo program.)

- Process wizards are available to:
  - Update student records.
  - Schedule students and catechists.
  - Post tuition and fees.
  - Print reports.

- You can move the columns on a Listing Screen to see information in the order you prefer.

- Any Family, Student or Catechist in the program can have a picture associated with it.

- Program security can be setup to require a user name or both a user name and a password to enter the program.

- With program security, each user can be assigned All Access, View Only Access, or No Access to different areas of the program.

- Our Report wizards step you through the process of setting up a report so any report prints just the way you want it to look. You can even select where items such as the page number and date appear on a report.

- In the Report wizard you pick which printer to use, paper size and orientation, margin style, and the page style which includes the font and if you want lines and shading to print on lists.

- There are processes which make it easy to:
  - change area codes for all or selected exchanges
  - post payments for any tuition or fees
  - delete classes and schedules
  - backup your data and setup a process for automatic backups
Restrictions in the Demo Program

The PDS Formation Office Management Demo program will limit the number of items that you can enter into the program. This should give you an opportunity to explore the program fully. The complete version of the program does not have these restrictions.

- The number of families is limited to 100.
- The number of members is limited to 200. Members include Parents, Guardians, Students, and Catechists.
- The number of funds is limited to 10.
- The number of Classes/Sessions is limited to 35.
- No records can be deleted.
- The user may not access the License screen.
- The user may not Backup or Restore data.
- The user may not run the Fix Data process.
- There are no Help or documentation files available at this time.

Where Do You Get Program Support?

If the PDS Formation Office Management program was purchased through a PDS dealer in your locality:

You will receive program support from the dealer. Contact that local PDS software dealer for assistance.

If the PDS Formation Office Management program was purchased directly through Parish Data System, Inc. and you have a support agreement with PDS:

Call your authorized support number for assistance during the time period specified in your agreement.

If the program was purchased directly through Parish Data System, Inc. and you do not have a support agreement with Parish Data System:

Contact the PDS business office at (602) 789-0595, 8:00am – 5:00pm, Monday through Friday.

Who Provides Network Assistance?

For installation, support and troubleshooting of your Network, contact your Network technician. PDS can only provide support for its programs.

Who Provides Printer Assistance?

For printer problems, contact the hardware representative or visit the printer company’s website to download and install the latest printer drivers for your particular printer and model. Installing the latest printer drivers usually corrects most printer problems. Your new printer may not have come with the latest printer drivers.
2: Installing and Starting the Demo

Chapter Overview
This chapter lists what is required to operate the program, how to install the PDS Formation Office Management Demo program, and what is required to start and use the program.

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What You Will Need
To use the PDS Formation Office Management program, you will need the following:

✓ Windows 95/98/NT4.0/2000/ME/XP operating system, installed & running.
✓ Pentium processor (minimum requirement). 1GHz or more is recommended.
✓ At least 32MB of RAM. 256MB is recommended
✓ VGA color monitor (800 x 600 or higher).
✓ CD-ROM for installing the program (not applicable for downloaded demo).
✓ 3 1/2” HD disk. CD-RW, Zip®, Jaz™ or other high-capacity removable backup media is recommended for backing up data. (This feature is not available in the demo.)
✓ Inkjet or Laser printer supported by Windows.
✓ 150MB of available disk space to install the program.
✓ Backups of data are created automatically and will require additional hard drive space.
✓ To use the HTML Help files and electronic funds transfers, MS Internet Explorer 4.0 or higher is needed.
✓ To send an e-mail from within the program you need an e-mail program such as Outlook Express or Microsoft Outlook.
✓ To go to a web page from within the program you need a web browser such as Netscape Navigator or MS Internet Explorer 4.0 or higher
✓ The Demo version of the program limits families, members, fund setups, and classes/sessions as described in the previous chapter. The full working program does not have these limits. They are only limited by the amount of free disk space available. The PDS Formation Office Management files however, can never exceed 4 gigabytes.
What’s On the PDS CD

The CD contains your PDS Formation Office Management Demo program plus other items you can use:

- Click on the **Demos & Brochures** button to install one of the following demo programs:
  - Church Office Management Demo – Version 1
  - Formation Office Management Demo – Version 1
  - School Office Management Demo – Version 1
  - Facility Scheduler Demo – Version 2
  - Ledger/Payroll Demo – Version 3

- Click on the **Demos & Brochures** button to view an on-screen brochure for one of the following PDS products:
  - Foccus Premarital Testing instrument

- Click on the **Program Videos** button in order to:
  - Take a video tour of the programs. From the Program Videos Menu click on which program you want to learn more about. Each screen contains:
    - Introduction – a quick tour of major program features.
    - Navigation – how to get around in the program.
    - Other videos that explain how to setup and use the program.
    - There is even a collection of videos just for previous users of the program that are upgrading to the latest version.

**Note:** To watch the videos you must have a sound card and the appropriate Windows Multimedia components installed on your computer (Media Player, Audio Compression, Video Compression).

If videos are not clear: If the Windows Media Player Version 7 or higher is used to view videos, there are settings that must be changed so you can read the text. Change the settings as described here before playing the videos or, if a video is playing, click on the Stop button first, then on Play after settings are changed.

Go to your Windows Control Panel. Select **Display | Settings**. Change the Screen Area to 1024 x 768 or higher. Remember the original setting. Click **OK** then exit the Control Panel.

In the Media Player, click on the Windows maximize button in the upper right corner. Now in the Windows Media Player’s Menu Bar click **View | Zoom | 100%**. You can change back to your original screen settings after viewing the videos.

- Click on the **Click Here for CD Extras** sign in order to:
  - View information on how to contact PDS.
  - View the PDS Web site.
  - Update your Windows installation.
  - Use Windows Explorer to browse the CD.
Step 1: Installing the Demo Program

1. Place the PDS demo CD in the CD-ROM drive.
   - If AutoPlay is enabled for your CD-ROM drive, the Parish Data System CD-ROM will start automatically. Continue with step 4.
   - If the Parish Data System CD-ROM does not start automatically, continue with step 2.

2. From your Windows Start menu choose Run. The Run dialog box appears.

3. Type the drive letter containing the PDS CD followed by a colon, then \setup. Then click OK. For example, where the CD-ROM drive is drive e:, you would type e:\setup then click OK.

4. The Main Menu for the PDS CD appears.
   - To install the Formation Office Management Demo program, click Demos & Brochures.

5. When you click Demos & Brochures, a new set of buttons appears on the Demos & Brochures menu. Click the picture of the PDS Formation Office Management program to start the installation wizard. A dialog box displays a status bar while Setup is preparing the Installation wizard.

6. The Welcome dialog box appears next.
   - After reading the text, click Next to continue.
   - If you have other Windows programs running, click Cancel and then click Exit Setup to exit the Setup process. Now close all other programs. Begin again with step 5 above.

7. Choose Destination Location dialog box: you select where to install the demo programs.
   - Click Next to accept the default location.
   - Click Browse to change the drive, directory (to create a new directory, type the name in the Path dialog), or to map to the network drive. Click OK to close the Choose Directory dialog, then click Next.

8. Start Copying Files dialog box: shows your Current Settings for the type of installation and the target folder (drive and directory) for the programs.
   - To continue click Next, or click Cancel to stop the install wizard.
   - Click Back to change a folder (drive and directory) for program installation.

9. When you click Next, a status bar shows the progress as files are copied to the drive. Note: On some systems, a folder titled “Parish Data System” and one icon displays on top of your install screen. Just click on Close in the upper right corner of the Windows folder and then continue with the PDS install wizard.

10. Setup Complete dialog box: appears when installation is complete. Click on Finish.

11. Setup Finished menu on the CD displays. Click Exit to close the CD.

12. In some cases you may be asked to restart the computer. If requested to do so, you must reboot before you can use the PDS Formation Office Management Demo.

13. Now start the PDS Formation Office Management Demo program (see Step 2, Starting the Demo Program, below).
Step 2: Starting the Demo Program

The Parish Data System folder on the Start menu contains the PDS Formation Office Management Demo program. Select one of the following to start the program:

1. From your Windows Start menu choose Programs | Parish Data System | Formation Office Management Demo.
   
   or

   Click on this program icon on your desktop. The install process automatically creates this on the Windows desktop for you.

2. This is the program’s Home Page.

3. The Menu Bar across the top provides access to the program commands, keyword lists, system processes and special utilities for running backup, restore, test programs and fix data.

4. The buttons down the left side make up the program’s Main Menu. Each button takes you to a distinct part of the program where data is entered and looked-up, where lists are viewed, and where reports and processes for the main topic are run.

NOTE: If you have the Demo CD you can see a video of the Formation Office Management that will take you on a guided tour of the complete program. See page 5 for instructions on running the CD video. If you downloaded the Formation Office Management demo program, the video will not be available.
The following is a summary of important parts of the program. This should help you to move around within the program and experiment with each screen.

At the top of the Home Page you will see a list of headings starting with **File**. If you click on each one with the mouse you will see a drop down menu. **File** contains the name of each of the items contained in the buttons down the left side of the screen plus information about the program being used.

**Keywords:** This contains a list of terms being used by the program that are user defined. It covers such things as cities, types of phones, etc.

**System Process:** This menu contains a number of screens that allow you to configure the program to meet your needs.

**Backup Restore:** This option is used to set up the backup schedule and start the backup or restore process.

On the left side of the Home Page there is a series of buttons that make up the Main Menu for the program.

**Family Info:** Clicking on this button brings you to the **Family Detail** Screen. On this screen you can set up and view all of your families. The tabs on the left of the screen show different aspects of each family. **Parents/Guardians** is where you find detailed information about parents, guardians, and other members of the family. **Tuition and Fees** is the tab you will use to see all financial data for a family. **View Listing** is a feature with most of these Menu items that allows you to customize a listing screen and print it as a report. **Family Reports** is where you will find all of the reports for family, financial, and parent/guardian reports.

**Students:** Clicking on this button brings you to the **Student Detail** Screen. On this screen you can set up and view all of your formation students. **Personal Info** is where you find more general member information. This information can be shared with the Church Office and School Office Management programs. **View Listing** is a feature with most of these Menu items that allows you to customize a listing screen and print it as a report. **Student Reports** is where you will find all of the reports for students and certificates.

**Catechists:** Clicking on this button brings you to the **Catechist Detail** Screen. On this screen you can set up and view all of your formation catechists. **Personal Info** is where you find more general member information. This information can be shared with the Church Office and School Office Management programs. **View Listing** is a feature with most of these Menu items that allows you to customize a listing screen and print it as a report. **Catechist Reports** is where you will find all of the reports for Catechists.

**Fund Setup:** This screen is where you define what charges and payments will be used in the program. The program can accommodate an unlimited number of funds. (Note: The demo is limited to 10 funds.) Each fund has one or more time periods associated with it. Activities are grouped according to your reporting needs. For each fund you can specify whether the fund will be available to other Church Office or School Office Management users.
Easy Lists: Easy Lists are an extension of the View Listing screens. Here we take the flexibility of the listing screens and combine it with the power of some commonly used selections. The result is an easy way to access commonly used data.

Once you have selected your list, you can use the Customize the View to select different columns or Print the List to turn it into a printed report.

Class Schedules: Clicking on this button brings to you the Class/Session Detail Screen. The Session Information tab has a list of catechists that are involved with the class. You will also record the time, room, starting and ending date for the class. Use the Set Frequency button to choose how frequently the class will meet. The Class List tab offers a convenient way to see all of the students enrolled in the class. The customizable View Listing Screen allows you to see many Classes at once. Class/Session Reports is where you will find some class reports. You can even create your own reports and export files.

Quick Posting & EFT Processes: A number of Student, Family and Tuition & Fees Quick Posting processes help you enter large amounts of data quickly and efficiently. Most processes will allow you to select whether you automatically update a group of individuals based on the criteria you specify or whether you just enter the names of the individuals you want to process. You always have an opportunity to review the entries before the processing takes place. You can also make a printout if you want. Electronic Fund Transfer features allow you to collect payments and donations automatically directly from a members checking or savings account or using a credit card.

Processes: A number of other Classes/Sessions, Student, Family and Tuition & Fees processes help you manage large amounts of data at various times throughout the year. For example the Grade Promotion process allows you to quickly update grades for all children at once.

Reports: Clicking on this button displays all the various categories of reports. Clicking on the Open All button displays each report available. Once you select a report, a Wizard will lead you through the process of selecting the printer, paper size, orientation and margin. The tabs on the last screen allow you to determine who should be printed in the report.

User and Passwords: This screen allows you to setup those who are authorized to use the program and to what degree they can use each section of the program.

Exit: Always exit the program before shutting down the computer.