

PDS Formation Office Training for the Diocese of Austin

By

Trinity Publications – Software & Support Department

Led by David Cotton

- I. PDS Formation Office**
 - a. Program Overview**
 - b. Family – Student/Parent – Contribution relationship**
 - c. Sharing Data – what does it mean?**
 - d. Best Practices**
 - i. Mixed Case with all entries**
 - ii. Keywords – integral to the program**
 - iii. ID Numbering Concepts – used with online registrations**
 - e. Navigation Tab Basics**
 - i. Looking up families, students, & parents/guardians**
 - ii. Navigating from a family to a student or parent/guardian**
 - f. Tasks Tab Basics – Adding, Changing, & Deleting information**
 - g. Family Screen Detail**
 - i. “Active” vs “Inactive”. It’s not the same as Church Office.**
 - ii. ID/Env Number**
 - iii. Family Status**
 - iv. Phone Numbers & Texting & Email Addresses – Oh My**
 - v. Family Keywords vs Remarks**
 - vi. Reasons for Changes**
 - vii. Log of Activity**
 - viii. Add a Family to the database**
 - 1. Existing family in Church Office**
 - 2. Non-registered family.**
 - ix. Processes – especially inactivating all families**
 - h. Class Schedules**
 - i. Class vs Session vs Grade – are there any differences?**
 - ii. Session Naming conventions**
 - iii. Year/Period – it’s possible to keep track of multiple years at one time**
 - iv. Catechist vs Catechist Position**
 - v. Setting up the Schedule and marking the days class will not meet**
 - vi. Calculate Days Present – what?**
 - vii. Adding a new Class/Session vs copying an existing session**
 - viii. The Listing Screen**

- i. Students Screens Detail**
 - i. Detail Screen – not shared with Church Office**
 - 1. Putting students in a session
 - 2. Formation Grade vs School Grade
 - 3. Health problems (allergies, etc.)
 - ii. Personal Screen – shared with Church Office**
 - 1. Member Names – including members with different last names
 - 2. School Grade
 - 3. Birth Date – age is automatically computed daily
 - 4. User Defined Fields (e.g. T-shirt size, etc.)
 - iii. Attendance Screen**
 - iv. Communication Screen**
 - v. Service/Retreats – most often used with Middle and High School students**
 - vi. Enrollment/Permanent Record**
 - vii. Sacraments Screen**
 - 1. General Information including “Saint Name”
 - 2. Entering detail information vs Quick Posting
 - 3. Link to the Sacramental Register and to Church Office
 - 4. Sacrament Place Names
 - 5. Printing First Communion and Confirmation Certificates
 - 6. Scanning and storing Baptismal Certificates
 - 7. Printing Notification Letters to the Church of Baptism
 - viii. Talents & Ministries Screen**
 - ix. Contacts**
 - 1. Recording Emergency Contacts
 - 2. Recording non-custodial parents
 - 3. Borrowing contacts from a sibling
 - x. Other Routines**
 - 1. Easy Lists
 - 2. Quick Posting
 - a. Sacrament Dates – a real time saver
 - b. Classes or Sessions
 - c. Attendance – post a class at a time (very quick)
 - 3. Processes – lots and lots of power. Call me at year-end time.
 - a. End-of-Year and Grade Promotion
 - b. Setup classes for the new year based on last year’s schedule
 - c. Delete old classes very easily
 - d. Reassign class dates globally when necessary
 - e. Online registration – pros and cons
 - f. Quick Add from Shared Data File
 - xi. Add a Member to the database**

- j. Parents & Guardians**
 - i. Sometimes only one parent is entered here**
 - ii. Personal Screen - A parent can be a Catechist and a Student**
 - iii. Communication Screen – emails and cell/work phones**
 - iv. Volunteer/Prep Classes**
 - v. Safe Environment – eAppsDB is still the main place to record this info**
- k. Tuition & Fees**
 - i. Fund Setup**
 - 1. Fund Numbers**
 - 2. Fund Periods vs Billing Periods**
 - 3. Posting payments outside of a fund’s date range**
 - 4. Groups vs Activity Names vs Activity Functions**
 - ii. Fund Examples**
 - 1. Elementary RE registration & fees**
 - 2. Youth Ministry fees**
 - iii. Detail contribution info**
 - iv. Recap/Totals**
 - v. Quick Posting**
 - 1. Religious Ed payments**
 - 2. Religious Ed charges and fees**
 - vi. Processes**
 - 1. Move Fund Entries**
 - 2. Carry Forward Balances – does anyone do this?**
- l. Catechists Screens – they’re hidden**
 - i. Adding Catechists that aren’t parents of students**
 - ii. Primary Information – how does it get here**
 - iii. Assignments/Education/Achievement – wow, that’s a lot of information**
 - iv. Certification**
- m. Reports**
 - i. Report screens**
 - 1. Overview screen**
 - 2. Printer Screen**
 - 3. Layout Screens**
 - a. Listing & Labels**
 - b. Letters**
 - 4. Selection Screen**
 - a. Sortation**
 - b. Specific Families**
 - c. Additional Selections – access to the entire database**
 - d. Boolean Logic Enhanced**
 - e. Saving Criteria including Owner Name and Access**

- ii. Family Reports
 - 1. Report Examples
 - 2. Quick Listings
 - 3. Family Schedule Letter
 - 4. Texting Permission Letter
 - 5. Labels
 - 6. Quick Communication Routine – Texting, Email, & Phone in one report
 - 7. Adding Reports
 - a. Report Owner and Access
 - b. Letters
 - c. Exporting to a CSV file
- iii. Student Reports
 - 1. Report Examples
 - 2. Quick Listings
 - 3. 2 Attendance Listings – what’s the difference
 - 4. Student Class/Session List
 - 5. Simple Class/Session List
 - 6. Student Class/Session Sign In/Out
 - 7. Statistical Information
 - 8. Texting Permission Form Letter
 - 9. Texting Routine
 - 10. Sacrament Notification Letters
- iv. Catechist Reports – including Name Tags (with pictures)
- v. Tuition & Fees Reports
 - 1. Fund Activity Report
 - 2. Charges & Payments with Return Coupon
 - 3. Financial Analysis Reports (esp. Summary of Grand Totals by Fund)
- n. File Pulldown Menu
 - i. Setup Screen
 - 1. ID Number Options
 - 2. Initial Setup
 - 3. Email & Text Setup
 - ii. Sacrament Setups
 - iii. Keywords
 - iv. System Processes – including finding and correcting duplicate families
 - v. Backups – Church Office and Formation Office do the same thing
 - vi. Fixing Data Discrepancies
- o. Users & Passwords
- II. Enhancement Suggestions – “Get Satisfaction”
- III. Support – Where to go with questions and problems. 877-455-9300.