PDS Formation Office Training for the Diocese of Austin

By

Trinity Publications – Software & Support Department

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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.