Training Tips For

What do we do next?

Start with your <u>CATECHISTS</u>

Now that you have successfully imported the information from the "Church Office" database, the first thing to do is to find your catechists in the "Formation" database and mark them as catechists. Here are the instructions for finding your catechists:

> click **FAMILIES** (top ribbon)
> click **LISTING SCREEN** (left bar, 2nd under OTHER TASKS)
> Either - click the <u>first letter in the last name</u> of the desired catechist   or
>   - click the "down arrow" along the side of the **FAMILY NAME** field
>   to search the names until you find the catechist.
> click the <u>catechist name</u> and their personal file will appear.
> click the **PARENTS/GUARDIANS** (top ribbon)
> click the **CATECHISTS** block on the right side of the page.
> **REMEMBER:** click **SAVE** after each catechist file changed
> Repeat this until all of your <u>known</u> catechists have been marked.

If a known catechist is <u>not</u> in the database, add him/her to the database using the following instructions:

> click **FAMILIES** (top ribbon)
> click **ADD FAMILY** (top right corner) - a blank **FAMILY** screen will appear.
> Ignore the **ID NUMBER** field.
> click the <u>three dots at the end </u>of the **FAMILY NAME** field — this will take you to the
>   **FAMILY NAME** screen. Complete all the information,
> click the **APPLY/OK** button at the bottom of the screen .

- Continue to fill out the screens under each of the tabs (**PARENTS/GUARDIANS**, etc) with as much information as you have.
- Click **+ ADD FAMILY** in the upper right corner, if you are adding an entire family when you . click **SAVE** and the system will automatically ask you if this person is a catechist. When you answer <u>yes</u>, the system will mark the appropriate place.
- Click **STUDENTS** to add any children in this family. Complete all information.
- Click **ADD STUDENT** in the top right corner, screen will ask if you would like to add to this family or in a new family. Choose and fill out the information.
- When there are no students to add, click **CANCEL**.

       REMEMBER: click **SAVE** (top right corner) after each edit or file change

A little clarification on how to move around the screens. The ➔ ◀   that appear on the top middle of the screen move you from family to family. The ➔ ◀   that appear on the top middle of the screen, ALSO, move you within a family, from husband to wife, and from student to student within a family.

PDS Formation