

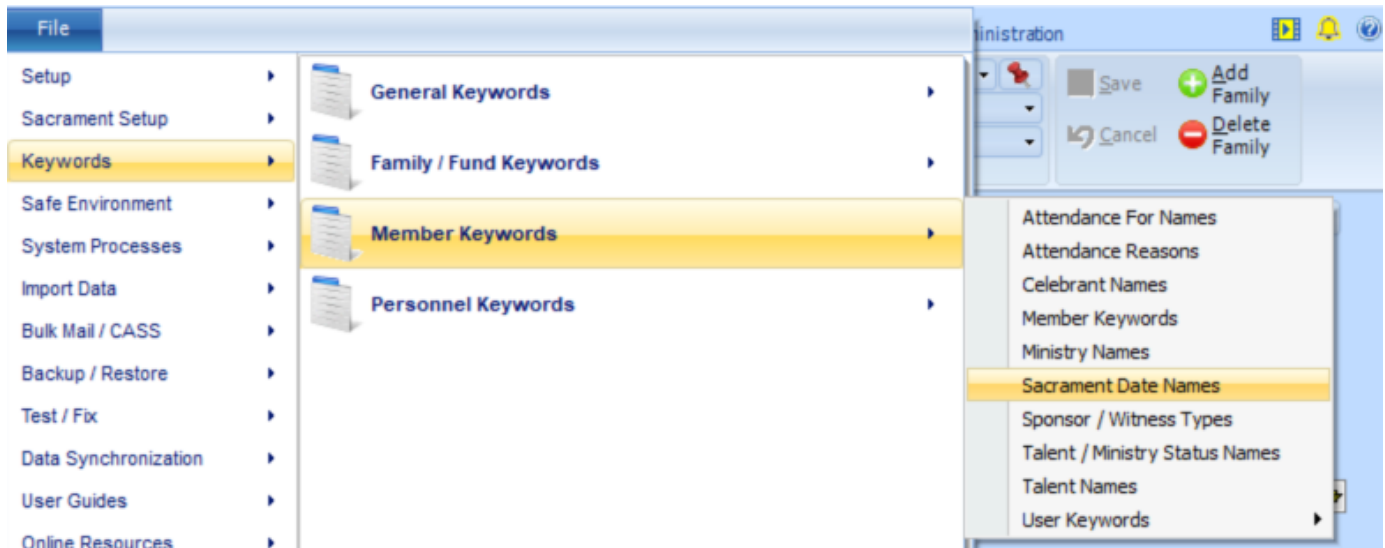
Sacraments – Global Settings

For our implementation, there are some important global settings relating to Sacraments that must be correctly configured. The following instructions will walk you through the steps necessary to

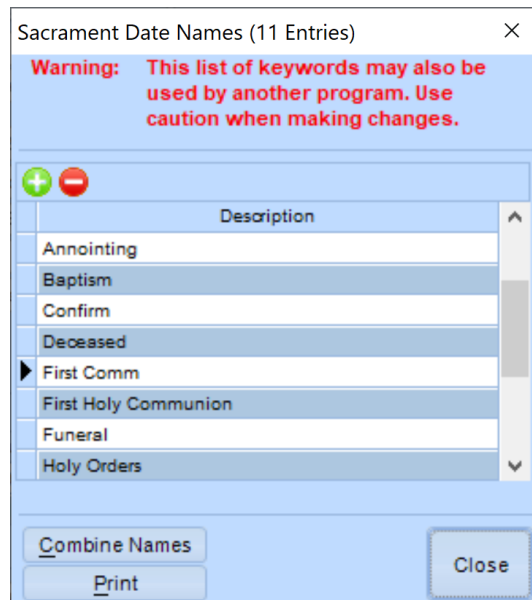
- Confirm that the Sacrament Date Names that you are using are entered properly and that there are no duplicates.
- Confirm that the Sacraments are connected properly to the base Sacrament types in PDS.
- Clean up the Sacrament Places list of Churches where Sacraments have taken place.

Step #1 – Confirm that the Sacrament Date Names that you are using are entered properly and that there are no duplicates:

Select **File | Keywords | Member Keywords | Sacrament Date Names**



The Sacrament Date Names list will look something like this:



For our purpose, we're going to focus on the following Sacraments:

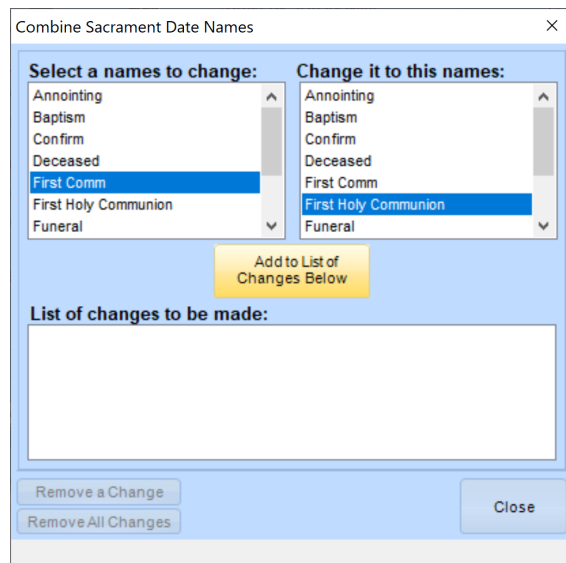
Baptism
Marriage

First Holy Communion
Ordination

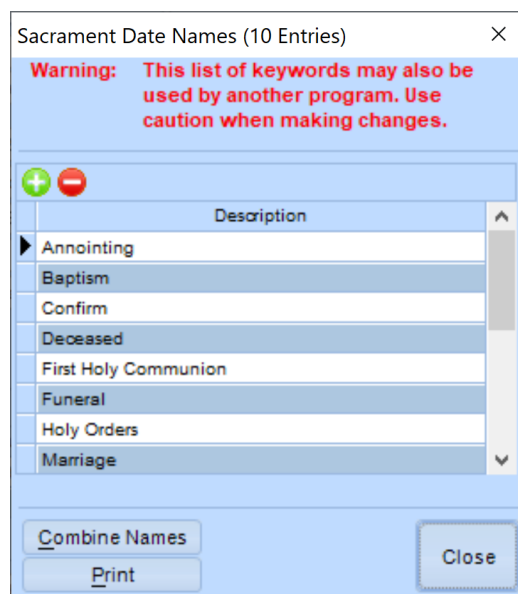
Confirmation
Deceased

You will want to look for any duplicate Sacrament Names in this list. In our example screenshot, you'll notice that we have a 'First Comm' and a 'First Holy Communion' Sacrament name in our list. We will want these combined into one name that will be 'First Holy Communion'. To do this, click on the COMBINE NAMES button.

Select the name you want to remove on the left side of the window and select the name that you want to change it to on the right side and click the ADD TO THE LIST OF CHANGES button:



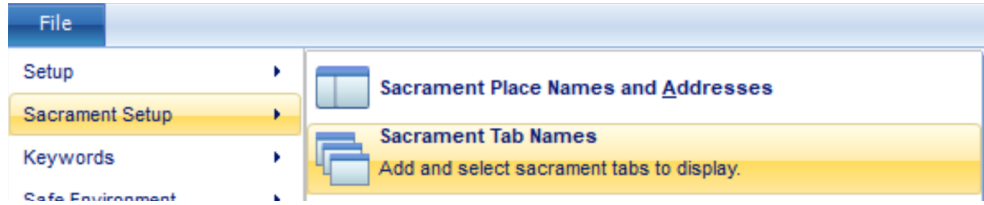
Then, click the Combine/OK button to complete the combine process. Your final list will look this:



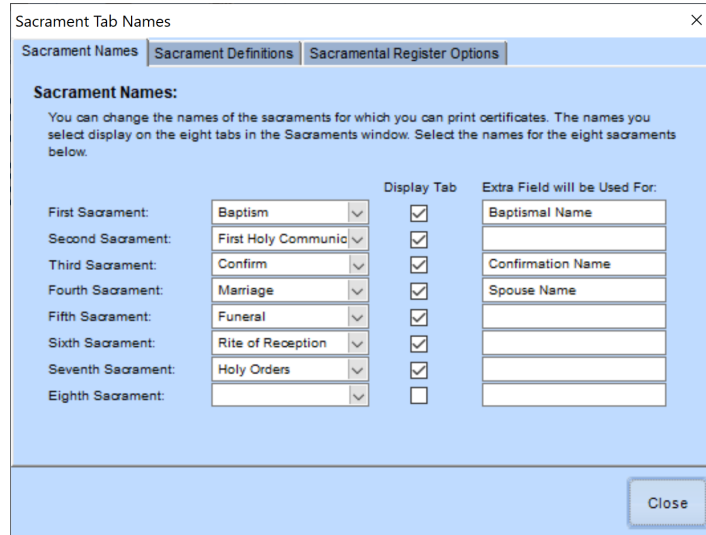
Ensure that there are no more duplicates or typos before moving onto.

Step #2 – Confirm that the Sacraments are connected properly to the base Sacrament types in PDS.

Select File | Sacrament Setup | Sacrament Tab Names

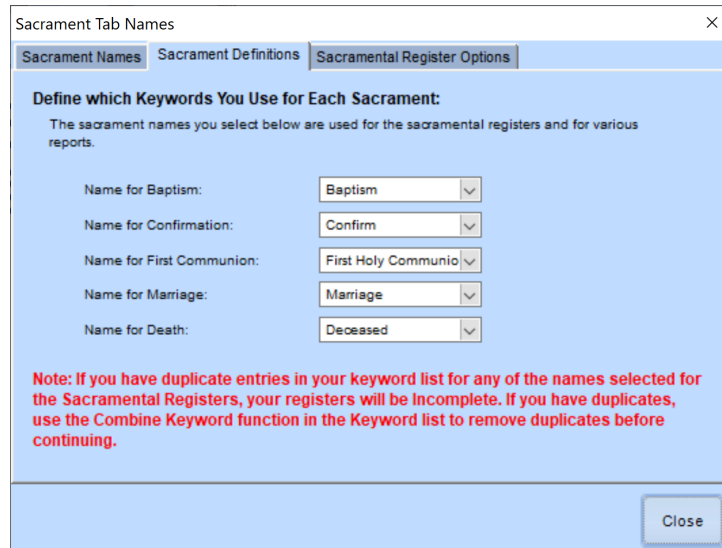


This will bring up the following window:

A screenshot of a window titled 'Sacrament Tab Names'. It has three tabs: 'Sacrament Names', 'Sacrament Definitions', and 'Sacramental Register Options'. The 'Sacrament Names' tab is active. The window contains the following text: 'Sacrament Names: You can change the names of the sacraments for which you can print certificates. The names you select display on the eight tabs in the Sacraments window. Select the names for the eight sacraments below.' Below this is a table with three columns: 'First Sacrament:', 'Display Tab', and 'Extra Field will be Used For:'. The rows are: 1. Baptism, checked, Baptismal Name; 2. First Holy Communion, checked, empty; 3. Confirm, checked, Confirmation Name; 4. Marriage, checked, Spouse Name; 5. Funeral, checked, empty; 6. Rite of Reception, checked, empty; 7. Holy Orders, checked, empty; 8. (empty), unchecked, empty. A 'Close' button is at the bottom right.

NOTE: When reviewing the list of Sacrament Names, you'll want to evaluate whether there are any in this list that do not fit into the following categories – *Baptism, First Holy Communion, Confirmation, Marriage, Ordination, Anointing, RCIA*. Be sure to inform the Implementation Team about these to determine if/how these can be carried to our new system.

Click on the Sacrament Definitions tab at the top of the screen and ensure that each Sacrament is matched to the proper Sacrament Name in the picklist next to it:

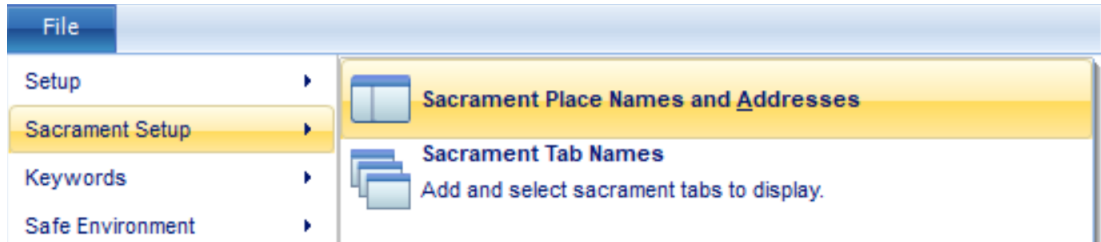
A screenshot of the same 'Sacrament Tab Names' window, but with the 'Sacramental Register Options' tab selected. The window title is 'Sacrament Tab Names'. The tabs are 'Sacrament Names', 'Sacrament Definitions', and 'Sacramental Register Options'. The 'Sacramental Register Options' tab is active. The text reads: 'Define which Keywords You Use for Each Sacrament: The sacrament names you select below are used for the sacramental registers and for various reports.' Below this are five rows, each with a label and a dropdown menu: 'Name for Baptism: Baptism', 'Name for Confirmation: Confirm', 'Name for First Communion: First Holy Communion', 'Name for Marriage: Marriage', and 'Name for Death: Deceased'. A red note at the bottom says: 'Note: If you have duplicate entries in your keyword list for any of the names selected for the Sacramental Registers, your registers will be Incomplete. If you have duplicates, use the Combine Keyword function in the Keyword list to remove duplicates before continuing.' A 'Close' button is at the bottom right.

After confirming that those are configured properly, click CLOSE.

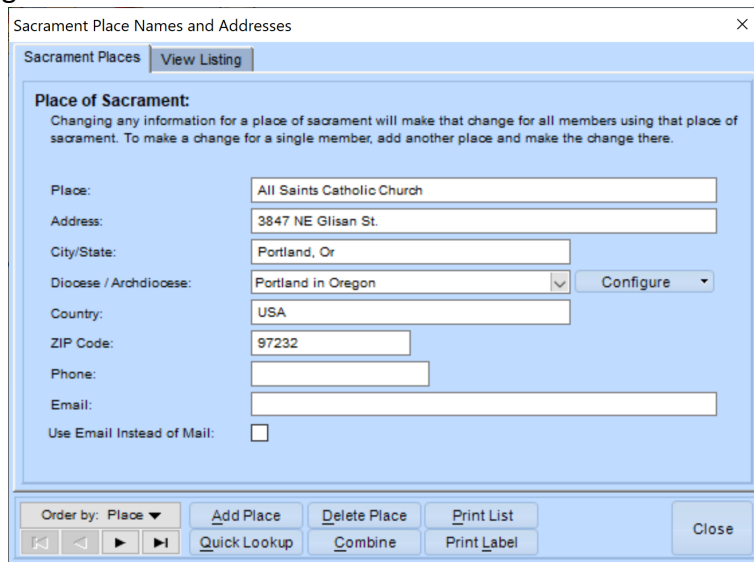
Step #3 – Clean up the Sacrament Places list of Churches where Sacraments have taken place.

The Sacrament Places list is notoriously troublesome with duplicates. To ensure a clean migration of your Sacrament Places list, it is essential that you combine duplicates, so that there is one entry per Sacrament Place.

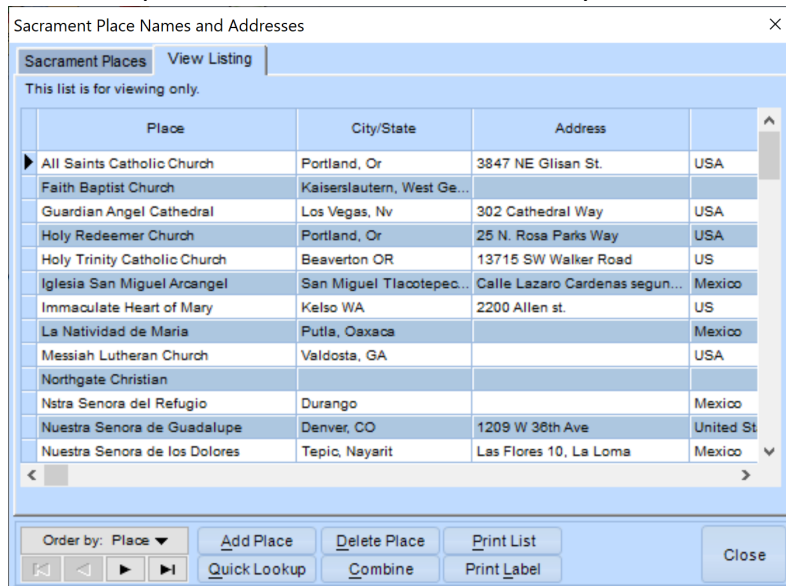
Select File | Sacrament Setup | Sacrament Place Names and Addresses



This will bring up the following window:

A screenshot of a window titled 'Sacrament Place Names and Addresses'. It has two tabs: 'Sacrament Places' and 'View Listing'. The 'View Listing' tab is active. Below the tabs is a section titled 'Place of Sacrament:' with a warning: 'Changing any information for a place of sacrament will make that change for all members using that place of sacrament. To make a change for a single member, add another place and make the change there.' Below this are several form fields: 'Place:' (text box with 'All Saints Catholic Church'), 'Address:' (text box with '3847 NE Glisan St.'), 'City/State:' (text box with 'Portland, Or'), 'Diocese / Archdiocese:' (dropdown menu with 'Portland in Oregon' and a 'Configure' button), 'Country:' (text box with 'USA'), 'ZIP Code:' (text box with '97232'), 'Phone:' (text box), 'Email:' (text box), and 'Use Email Instead of Mail:' (checkbox). At the bottom are buttons for 'Order by: Place', 'Add Place', 'Delete Place', 'Print List', 'Quick Lookup', 'Combine', 'Print Label', and 'Close'.

Click on the VIEW LISTING tab at the top of the screen to see a full list of your Sacrament Places:

A screenshot of the same window as above, but with the 'View Listing' tab active. It shows a table with columns for 'Place', 'City/State', 'Address', and a fourth column (likely Country). The table contains 15 rows of church data. Below the table are the same control buttons as in the previous screenshot.

Place	City/State	Address	
All Saints Catholic Church	Portland, Or	3847 NE Glisan St.	USA
Faith Baptist Church	Kaiserslautern, West Ge...		
Guardian Angel Cathedral	Los Vegas, Nv	302 Cathedral Way	USA
Holy Redeemer Church	Portland, Or	25 N. Rosa Parks Way	USA
Holy Trinity Catholic Church	Beaverton OR	13715 SW Walker Road	US
Iglesia San Miguel Arcangel	San Miguel Tlacotepec...	Calle Lazaro Cardenas segun...	Mexico
Immaculate Heart of Mary	Kelso WA	2200 Allen st.	US
La Natividad de Maria	Putla, Oaxaca		Mexico
Messiah Lutheran Church	Valdosta, GA		USA
Northgate Christian			
Nstra Senora del Refugio	Durango		Mexico
Nuestra Senora de Guadalupe	Denver, CO	1209 W 36th Ave	United St
Nuestra Senora de los Dolores	Tepec, Nayarit	Las Flores 10, La Loma	Mexico

You will want to work through this list using the COMBINE button to combine all of the duplicate locations.