Sacraments – Global Settings
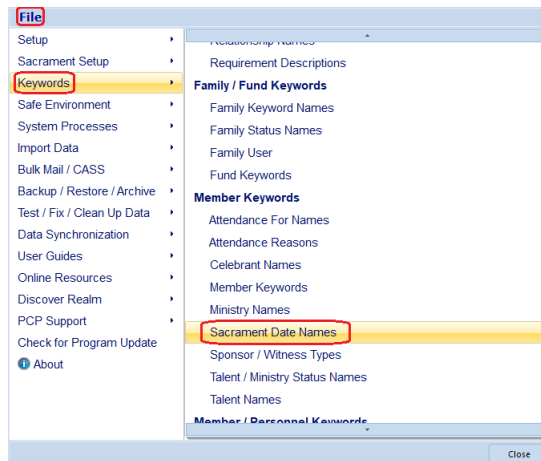*Version 10 for PDS*

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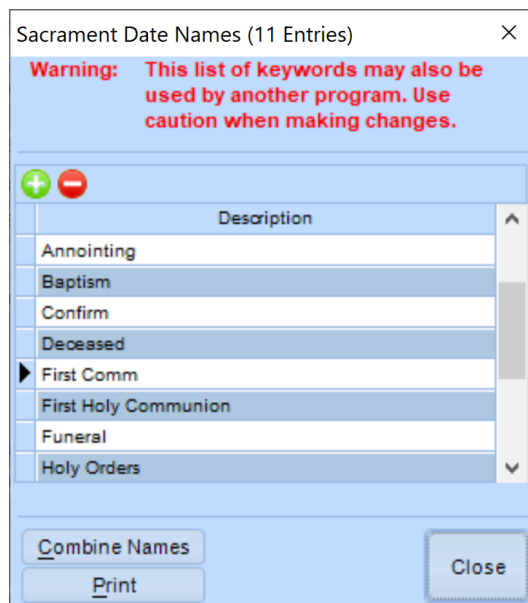
- Confirm that the Sacrament Date Names that you are using are entered properly and that there are no duplicates.
- Confirm that the Sacraments are connected properly to the base Sacrament types in PDS.
- Clean up the Sacrament Places list of Churches where Sacraments have taken place.

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

Select File | Keywords | Member Keywords | Sacrament Date Names

The Sacrament Date Names list will look something like this:

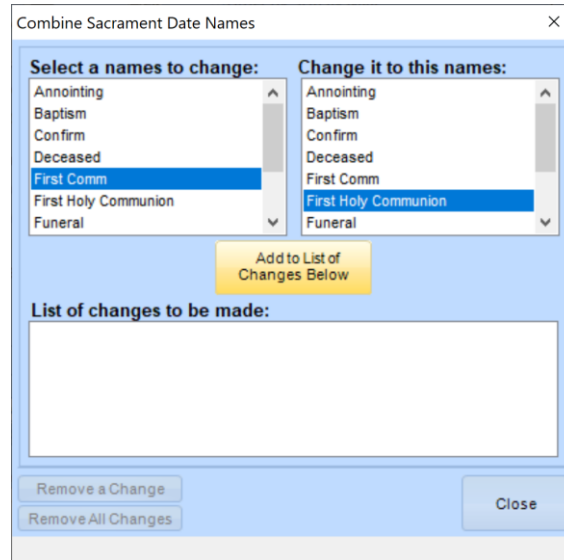<u>For our purpose, we're going to focus on the following Sacraments:</u>

Baptism   **First Holy Communion**   **Confirmation**
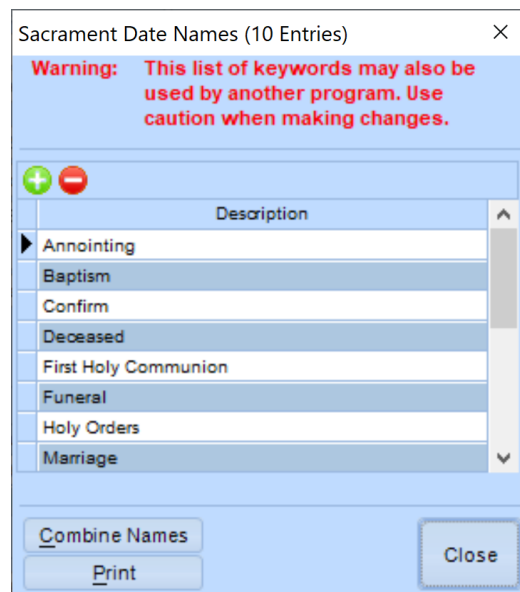**Marriage**   **Ordination**   **Deceased**

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:
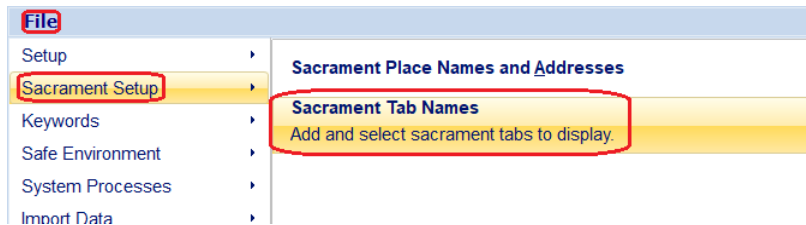

Then, click the Combine/OK button to complete the combine process. Your final list will look this:

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

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

Select File | Sacrament Setup | Sacrament Tab Names

This will bring up the following window:

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:

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:

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

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