The ZLC

Room Scheduler and

Event Planning System ™

Software to plan, schedule, and communicate
your church's activities and events.

User's Guide
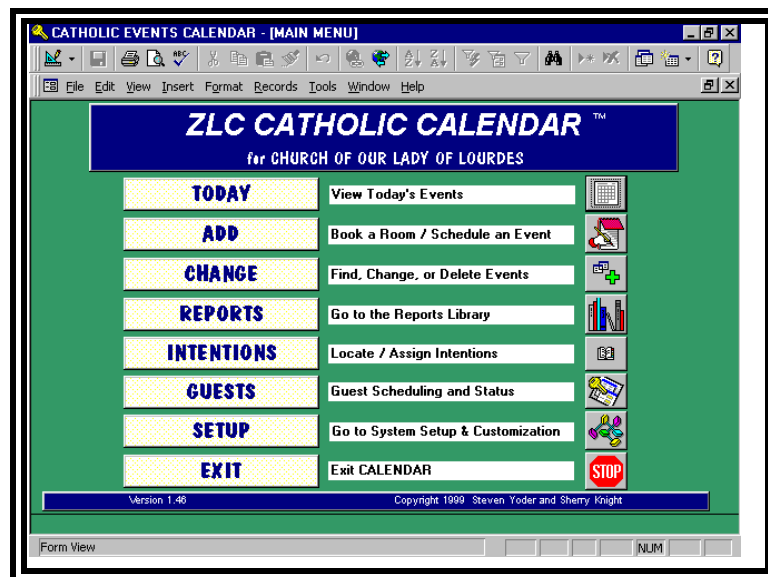
Installation

EPS is installed into your Windows system using an automatic Setup process. Once installed, you start EPS by clicking on the icon created by Setup.

The installation should only take a couple of minutes:

1. Insert the CD into the appropriate drive.

2. Go to Start, then Run and enter δ (i.e., the drive letter):\catholic_calendar\Setup.exe, then press the <enter> bar.

3. Push <enter> for each question that appears to accept the default installation.

The default installation will place the program on your Drive C hard disk. This is best for optimal performance. The installation also sets up EPS linked to the Demonstration Data File, which can be used to familiarize users with the system, if desired. See Chapter 2 for linking (setting up) a new data file.

Registration

EPS requires an unlock code before the software will run. The first step in using EPS is to register and obtain the unlock your software. You will find a registration sheet in the front of this guide. Fill it out and fax it to ZLC at the number shown on the registration sheet. We will fax back an unlock code complete with instructions.

Unlock EPS:

1. To register the software go the Setup screen from the Main Menu.
2. Click on the Register with ZLC Software button.
3. Follow the instructions on the registration sheet.
   Be sure to enter the registration name exactly as it is shown on the registration sheet.
   Also enter the unlock code exactly as it is shown on the registration sheet.
4. Be sure the Optional Features boxes for your configuration are checked.
   E.g., if your have purchase the unlimited room version of the Room Scheduler, plus the Event Planner those two boxes would be checked. If all modules have been purchased all boxes would be checked. *Note: If you purchased the limited room version of the Room Scheduler leave the Unlimited # Rooms box blank.*
5. Once you have filled in all the appropriate information click on the large Register the System button. If you get a message saying the package is not registered, go back over steps one through four to ensure the information is entered **exactly** as shown on the unlock code sheet. If the result of clicking the Register the System button is that you are returned to the Main Menu, then you are properly registered.
6. Once you have unlocked EPS proceed to Setup.

Multi-User Installation

All of ZLC's programs should be set up the same way for multi-user situations. They work the same way on Windows-for-Workgroups (3.11) networks, Windows 95 or 98 networks, Windows NT networks, or on Novell networks. There are no special requirements for the file server, because all that happens there is that a single shared data file resides there (No ZLC programs are running on the server).

For multi-user operation in a network situation, you must install the program onto each user's station in the normal way, then link each station's program to the single shared data file on the file server. This arrangement allows each user to maintain his/her own selections and other temporary tables -- necessary for proper multi-user operations. The station requirements are the same as if it were being used to run the program stand-alone (single-user). These station requirements are the same as for running Microsoft ACCESS, since the ZLC programs all run using ACCESS.

Here are the actual steps needed to accomplish the multi-user installation. First, install the ZLC program onto each desired station from the CD-ROM or diskette set. Then copy from one of the stations to the shared hard disk (network file server) the data file to be shared (usually CCDATAxx.MDB). On each station start up the ZLC program, go into the SETUP screen, and use the "Change Company" button to tell the program where to find this shared data file (the path specification must always include a Drive Letter) and click on REATTACH. After you get the "Successfully Reattached" message, you should exit the program. The next time you start it, you will be working in multi-user mode on that station. You can verify this by making a change on one station (and saving it) then going to another station to see the change reflected.

Finally, you may need to re-register the ZLC program, if the shared data file has not previously been registered. The registration information is stored in the data file, so each time you reattach to a new unregistered data file you must use the REGISTRATION-BY-FAX information sheet on that data file. If you reattach to a data file which was previously registered, then it will have that information already and will run appropriately.

Multi-Company and Multi Site Operation

ZLC programs let you set up any number of separate data files, and switch between them using the "Change Company" button in SETUP. You are asked for the name of the .MDB file and its location (as a DOS path, including the drive letter), then the program will shift over to that specified data file. You can set up as many of these data files as you wish, as long as they are all at the same site geographically. Using a ZLC program for multiple sites requires the appropriate multi-site license from ZLC Software Corporation.

Installation Guide for Display-Only Stations

This CD contains two different ways to set up Display-Only stations for the ZLC CATHOLIC EVENT PLANNING systems. You can set up as many of each type as you need (on a single local-area-network). For each such station you must install from this CD one or the other type of Display-Only program, then link that station into the single shared data file (which you must have previously registered to ZLC Software).

The first type of DO station will only run the Today's Events display only (either view: 3-in-1 or single-list). It will automatically keep the display updated to be current, in case you wish to leave it on all the time (unattended), such as a lobby display.

The second type of DO station will run all of the selecting and reporting parts of the ZLC Event Planning system, but not allow any changes to the information. Thus, this is for your users who need to look up activities more interactively, to see more levels of details, to check Intentions, even print out Calendars for their focused needs, but who should not be setting up or changing the schedule. They will need appropriate training and support, unlike the first type of DO station.

To install the first type, use Windows Explorer and go on our CD to the folder entitled: DISPLAYONLY. Locate the file in it entitled SETUP.EXE and double-click on it, then step through the installation process. Be sure to locate the program on a local hard disk, and do not try to run it over the network – only the shared data should be out on the network. After the installation, you can copy the startup icon onto the station's Desktop (use START-SETTINGS-MENUS-ADVANCED or call for assistance).

To install the second type, you do the same but use the folder entitled DISPLAYONLY-SELECT on our CD. Locate that folders SETUP.EXE and run it instead.

Finally, the first time you run either type of DO station, click on SETUP and you will see that it just brings up the Change Datafile and Reattach screen (If you set up the password on the SETUP function on your own station, the DO stations will require that password to get to this screen). Use this screen to attach to your shared data, and the DO station is ready to go.

Setup

EPS has been designed so that very little setup is needed in order to initially operate the system. The Setup screen contains the Church's basic information such as name and address, where you set up the location of data files, and where the software is registered.

Setup is also where you enter the descriptions for Groups, Individuals, Music, Religion, Rooms, Special / Reserved Days, Standard Liturgy, and Subject Texts. These descriptions are used on "Lookup Lists" in the various functions within EPS.

Basic information

The basic information is name and address. Please note that the name of the church **must** be filled in **exactly** as it is shown on the registration sheet, or the registration unlock code will not work.

Other information on the Setup screen

Field title	What it does
Auto Conflict Testing	Ensures two events and / or rooms are not booked at the same time.
Activity Security	Enables security system for password protection.

How System Security Works

There are two security level to be understood in the ZLC Calendar system.

1. Administrator's Password.

    If you turn on the Activate Security? in SETUP, you can set up an administrator's password. That password will be required to get into the SETUP screen, once you set it up. Then you can designate one or more system administrators to be the only ones who can change the location of files, the Lookup Tables, etc. The only Lookup table the users can then access is the Groups / Titles List -- that table can be called up from the BOOK A ROOM and the EDIT A ROOM screens by double-clicking on the label of that data field.

2. ACCESS97 Groups and Users.

    If you have Microsoft ACCESS97 on your computer then you can activate additional levels of security, and you can get into the design of the Calendar's formats for certain screens and most reports. This is only recommended if you have some expertise in ACCESS97 screen and report layout. To enable your use of ACCESS97 design functions, first activate ACCESS97's built-in security (by assigning a password to user ADMIN), then you create Groups and Users to coincide with the Groups and access levels built into the ZLC Calendar program.

    Here is how to do this:

    We have set up two Groups: CALUSERS and CALADMIN. If you set up these two Groups on your computer(s) then the members you set up in each group will have rights as follows.

CALUSERS – can run the Calendar program but not access any design view nor add new objects.

CALADMIN – can access the design views, and thus change as desired, all of the Reports, all of the Lookup List screens, and most of the ADDON-detail screens. This can be a very good way to get the system much closer to the way you like to see things, but you must limit your changes to cosmetic changes and avoid any structural changes. If you do render a screen or report inoperable, you may have to reload the original program to fix it, so we recommend that you limit your changes to only doing the following:

moving data elements around on the screen (without deleting any);
adding only Label-type elements and elements from the "Field-List";
changing the colors, sizes, and fonts;
if an element is not desired, just set its Visible property to NO – rather than deleting it. (it is useful sometimes to set all elements with Visible=NO to a strange color, so they stand out in design-view).

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Field title	What it does
Change Data Path	Tracks the location of the Church's data files. The data files have the extension .MDB that contain the shared data tables.
	Normally Change Data Path is used only when the system is installed.

How to Create a New Data Set

6. Click on the Change Data Path button.

7. Enter CCDATA14 at the Filename field - do not enter the .MDB extension (it will be attached to the file name automatically).

Note: The CCDATA14 file name may change when an upgrade is installed, requiring a conversion from the old to the new.

8. Enter the data path on the second line in the format: δ:\directory, where δ is the hard disk drive where the data files reside, and directory is the name of the directory where the data files are stored.

Note: EPS comes connected to Sample Data files. The filename is CCXMPL14.MDB.   When ready to set up your own data connect to CCDATA14; do not use the SampleData for your live data files.

9. Click on the Re-Attach button to complete the change over to the new data path. The cancel button when clicked reverts to the old data path.

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Field title	What it does
Register with ZLC Software	See Chapter 1 Installation.
Batch Changes	This function lets you specify a complete set of events and change them all simultaneously. It can be accessed through Setup or the Find, Change screen from the Main Menu
	To use this function, you must specify a set of events with the same Start Time, same Room, and same Title/Group. You also specify the new values for those items it can change: Time, Room, Parish?, Publish?, Intention? and Title/Group. You will see a list of events with both the before and after values, and must select Proceed to carry out the changes.

Lookup List Maintenance   These lists contain the descriptions for Groups, Individuals, Music, Religion, Rooms, Special / Reserved Days, Standard Liturgy, and Subject Texts

The descriptions entered here are used on "Lookup Lists" in the various functions within EPS.

There is no limit to the number of positions / activities / notes that may be entered on Lookup Lists.

List titles may not be changed, but list content is accessible at any time.

Order of Lookup List Set Up
1. Groups.
2. Individuals.
3. Rooms.
4. Special / Reserved Days.
5. The remaining lists can be done later.

How to Add, Change or Delete Lookup List information

1. Place the cursor / arrow in the list you want to work on and double click on the mouse.

2. To **add** to the list click on the blank line at the bottom of the list and enter the appropriate information Click or tab to the next field and enter the appropriate information. When you exit that line, it will be saved automatically.

Note: If you leave a "key" field blank or enter a duplicate value, you will get an error upon the Save. Use the Esc key to undo the error and the proceed.

3   To **change** the list click on the Title field you wish to change and type over the old information. Click or tab to the next field and change that information if it changed when the Title field data changed.

4. To **delete** from list click on the column to the far left of the line which contains the item to be deleted. Press the delete key, when the OK message appears press the Enter key.

5. **Multiple deletes**. You can delete a group from a list if the items are consecutively listed, that is, one follows the other.

   Click on the "record selector" box at the far left end of the first item to be deleted.

   Click on the last item to be deleted while simultaneously depressing the Shift key. All of the items will be highlighted.

   Press the Delete key, and click on OK.

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Field title	**What it does**
Path to Liturgy Document Files	This is an optional advanced function which allows you to access Word files for printing out the Presider's Book.

The Book a Room / Event section of the ZLC Event Planning System is the area where information as to time, date, and type of activity, for a specific room / event is set up. This is the function which initially books the room / event.

This is the Book a Room screen. When other modules are present the Room Scheduler screen shows a series of *Details* buttons next to the *Activity* boxes which lead to screens on which very specific information regarding the event and its execution is maintained. The *Activity* boxes may still be used with Room Scheduler to categorize the event; only the details will not be available.

Overview

Use the ADD function on the Main Menu to call up the BOOK-A-ROOM screen, on which you specify the Basic event information. The absolute minimum required for a new event is the Date / Times, and a Title / Group. Assigning a Location is optional. Other options are the Presider, Staff and Setup Notes, and the Activity categorization / details.

Throughout the system, when you leave a screen it automatically saves new records and / or changes. So once you start filling in a new event, it will exist unless you use the DELETE button before leaving the screen.

The SAVE button saves the event without leaving the screen (until you save it, you can instantly lose all changes if you hit the

ESCAPE key). Also, when you SAVE or RETURN, the system will check for any conflicts with other events that are scheduled to use the same room during the same time period (It will show you all such conflicting events in a pop-up window).

Another feature of the ADD function is to track Special Dates and Reserved Dates. Events on Special Dates will show the Title of that day just below the date-buttons area. If you try to schedule an event on a Reserved Date, the system will tell you that it is a Reserved Date.

Getting Around on the Screen

There are a few basic mouse clicks and keystrokes you should know in order to move around easily on any screen in EPS. Mastery of these keystrokes will help significantly in the operations of the program. For an expanded explanation see Appendix A.

10. **Exiting screens**. In the upper left hand comer of each screen (excepts reports) is an icon of an open door. Click on this icon to exit. Some screens will have the word Return on them; in that case click on the word to exit.

11. **Save.** Use this button to save new information or information on a room and event that has been added or changed.

12. **Next.** Takes you to a blank screen to add a new booking.

13. **Same Date.** This box is related to item 3 above. When checked EPS will automatically enter the date that was used on the previous entry. If left blank the sytem will use the current day's date.

14. **Cancel.** Click on Cancel to clear the screen.

15. **Print.** This function will print the screen contents directly to the printer.

16. **Record buttons and arrows.** Some screens have these items located on the bottom left side of the screen. The first number shown indicates the record number (i.e, entry) the cursor is resting on.

17. **Scrolling.**

    PgUp and PgDn. To move quickly through a list use the PgUp and PgDn keys. Use of these keys located on the computer's keyboard moves the cursor through the information on the list one screen at a time.

Ctrl + Home. Simultaneously depressing these keys moves the cursor to th first data record for information shown on the screen.

Ctrl + End. Simultaneously depressing these keys moves the cursor to the last data record of the current list.

18. **Arrows**. Use of the directional arrows (up, down, left, right) located on the computer's keyboard moves the cursor from field to field, one field at a time.

19. **Tab.** Moves the cursor forward from field to field, one field at a time.

20. **Ctrl + Tab.** Moves the cursor back one field.

21. **Data fill.** Many fields have look-up lists which have been defined in Setup. Also, there are many search functions in Event Planning System. Data fill is a method for entering this information using a shortcut. Simply enter the first letter(s) of the item and Event Planning System will fill in the remainder as it identifies the letter(s). When the name or item you want appears press the Enter or tab key.

How to Book a Room

From the Main Menu click on the **Add** button.

Time / Date

1. Dates may be entered using the buttons to the right of the date field, or by just typing the date. The plus and minus buttons under the *Mo, Wk, Day, Wk Mo* labels are for one unit at a time. That is plus / minus one day, one week, one month. Using these buttons simplifies data entry.

2. Time (from beginning to end) may be entered in the same fashion as the date. See step 1 above. Do not include setup time here, that is done a little later; only include the starting and ending time of the actual event.

3. The *Avail* button will produce a screen listing of everything scheduled for the specified date. Room Scheduler automatically searches for availability and will not double book a room. However, this screen is useful to view what else is happening that day.

4. Parish and Publish. Check either on or both of these boxes to enhance printing selection options.

5. Setup Time. Click on the plus button to enter the amount of time allowed to get the room ready before the event begins. Conversely, use the minus button to reduce the setup time if you need to modify it.

6. Set up recurring. Select the frequency of the recurring event from the lookup list. See separate section below for a detailed explanation of how the recurring function works.

People

1. Title / Participants. Click on the arrow to the right and select a participant (or double click on the *Title / Participants* shaded title area). If the participant is not on the list, enter the name manually. (See Chapter 2 to permanently set up a new name on the Lookup List.) **This field must be have an entry.**

2. Presider and Staff. These are optional fields. To select a Presider or staff member either select a name from the Lookup List, or enter in the name. (See Chapter 2 to permanently set up a new name on the Lookup List.)

3. Avail. This button appears by each of Title / Participants, Presider and Staff fields. When used a list appears on the screen that shows what that person is already booked for on that day.

4. Event Setup. This area is available for any notes you may wish to enter concerning the event.

Location

1. Select the room in which the event is to take place from the list shown on the screen. (If the room is not listed, go to Setup and enter it through Lookup List Maintenance. See Chapter 2.)

2. Avail. Shows the times for which the specified room has already been booked.

Recurring Room and Event Scheduling

There are two types of Recurring Event entries which may be set up in EPS, those determined by Frequency and those determined by Day-of-Month. The Frequency type is based upon the number of times an event occurs ,and the starting date that it begins. For instance, if a Church holds a Spaghetti Feed on the tenth of each month, and you would like to schedule a room for an entire year for this purpose you would use the *Set Up Recurring Activity* screen.

The Day of Month function is for an event that occurs on the same day of every month. Using the Spaghetti Feed example from above, let us say that the Feed falls on the third Wednesday of each month. For this type of entry you would use the *Day-of-Month Recurring Activity* screen.

EPS will check to see if the room is available for all the recurring dates requested. It will also check to see that none of the dates are *Reserved Special Dates.*

You will be notified when there is a conflict in dates you will notified and have the opportunity to make the appropriate adjustment.

Frequency Method of Recurring Activity

From the Main Menu select and click on the **Book a Room** button.

1. Fill in the appropriate information in the *Time / Date, People, Activity, and Location* areas.

    This is an important step, if the information is left blank EPS will not know how to schedule the room / event

    Information such as the date, event and room number is automatically transferred to the next screen (discussed in step 2).

2. Click on the pull down menu next to the *Frequency* field of the Time / Date section. Select one of the following: annual, bimonthly, biweekly, daily, monthly, occasional, one-time, quarterly, semi annually, semi monthly, or weekly.

From the Book a Room screen, click on the **Set Up Recurring** button.

1. Enter the frequency of the event in the *number of times to repeat* box. Tab to the *Final Date* box. This date is automatically calculated when the frequency is entered. (Conversely, if you enter the ending date first and tab back to the number of times to repeat box the frequency will be calculated automatically.)

2. Click on the *Proceed* button.

Day of Month Method
   of Recurring Activity

From the Main Menu select and click on the **Book a Room** button.

1. Fill in the appropriate information in the *Time / Date, People, Activity, and Location* areas.

This is an important step, if the information is left blank EPS will schedule the incomplete room / event many times.

Information such as the date, event and room number is automatically transferred to the next screen (discussed in step 2).

2. Click on the pull down menu next to the *Frequency* field of the Time / Date section. Select monthly.

From the Book a Room screen, click on the **Set Up Recurring** button.

1. Click on the *Day of Month* button.

2. Enter the frequency of the event in the *This function will create ...* box. Tab to the *Final Date* box. This date is automatically calculated when the frequency is entered. (Conversely, if you enter the ending date first and tab back to *This function will create...* the number of months will be calculated automatically.)

3. If you need to set up an event that falls on more than one day during a month, for example, the first and third Wednesdays of each month, create two Day of Month recurring entries. Changing the Spaghetti Feed to twice a month, the first Wednesday of each month, and the third Wednesday of each month would require a recurring entry for each day.

4. Click on the *Proceed* button.

Reviewing Scheduled Recurring Events

After you have scheduled Recurring Events using either the Frequency or the Day of Month method, a report will appear on screen. This is a preliminary report showing how your request was handled.

There are several key fields on this screen. Here are their functions.

Skip this date? This is the only box on this screen that may be used as a manual override. When this box is checked the particular date shown above it will not be scheduled.

The following items also appear on this screen, however they may not be changed from this screen. To make changes that affect these items. You must change the original entry before runnint the recurring process.

Conflicts? An *X* in this box indicates a scheduling conflict, i.e., another event has already been scheduled for this date.

Special Date? If a holy day or any other special date that you've set up, this box will be checked.

View conflicts. Shows a list of the events already set up for the same date and time.

Proceed. Creates the events listed. You must go the individual events to make any changes. Once this function is run see Section 4.

Cancel. You can still cancel the entire set of recurring events at this point)except the original entry.

Corrections to Recurring Events

If a whole sequence of Recurring Events is setup incorrectly you can use the **Batch Change** function to adjust the events. This function may be accessed through *Setup* (see Chapter 2), or through *Find, Change or Delete Events* (see Chapter 4).

Deleting Recurring Events

Sometimes it is simpler to delete a whole sequence of entries and then set them up again. This is done by selecting the whole set of entries. To select a group of entries go the *Find, Change. Or Delete Events* screen and select By Group and / or By Room. Then delete the entries from the View List screen (this is explained in more depth in Chapter 4).

Batch Changes

This function lets you specify a complete set of events and change them all simultaneously. It can be accessed through two screens: *Find, Change or Delete Events* and *Setup*.

To use this function, you must specify a set of events with the same Start Time, same Room, and same Title/Group. You also specify the new values for those items it can change: Time, Room, Parish?, Publish?, Intention? and Title/Group. You will see a list of events with both the before and after values, and must select Proceed to carry out the changes.

The Batch Changes is also explained in more depth in Chapter 4.

3.2 Event Planning

Overview

The optional Event Planning add-on modules include planning detail screens for non-liturgical events. Liturgical Event Planning tracks the details for Weddings, Baptisms, Memorials, church set-up, and Liturgy Plans. Non-liturgical events include tracing details for Sponsored Meetings, Outside Rentals, Food Service, Work Orders, and Workshops.

Event Planning is done from the same screen as Room Scheduling. To access Event Planning first indicate whether the event is a Liturgical Event or a Non-Liturgical Event, then click on the type of event, finally, click on the *Details* button for the event (this takes you to the area where all the pertinent detail information is set up).

Liturgical Events

For a Liturgical Event click on the *Liturgical Event?* button at the right side of the screen. The following choices in the form of buttons will appear:

Liturgy Detail (church setup)
    and Liturgy Plan

Baptism

Wedding

Funeral / Memorial

Ecumenical (no detail screen, use as an indicator for informational purposes)

Non-Liturgical Events

A Non-Liturgical Event may be set up by leaving the *Liturgical Event?* box blank. When the box is blank the following choices are available:

Sponsored Meeting

Outside Rental

Food Request

Work Order

Workshop

Engaged Couple

Baptismal Workshop

You can tell the Non-Liturgical section from the Liturgical section by the color of the buttons (NL = purple; L = yellow), and by the types of activities listed, and by the activities listed.

3.3 How to Set Up Intentions

Since it is not known who will have Intentions at the beginning of a year, two steps are involved in establishing Intentions.

The first is to set aside the dates and tines for all Intentions allocated to the upcoming time frame, usually a year. This sets up the future available Intentions.

The second step is to set aside a specific date and time for an Intention as it is reserved. This information will include the specific information on who / what the Intention is for, who requested the Intention, and pertinent other information.

Step 1 - Reserve Future Intentions

This step will set aside dates and times for Intentions which are for a specific future time frame (such as a year in advance).

> **Completeness of Entries**
> It is very important that the steps outlined below be followed in full. If information is left off the Intentions will not schedule correctly.

To reserve intentions go to the *Main Menu* and select:

Add - Book a Room / Schedule and Event

1. Enter the beginning date for the series.

2. Enter the time: from and to.

3. Select the frequency (e.g., weekly)

4. Under the *People* section on the first *Title / Participants* line select the description from the pull-down list, or enter a title using the keyboard.

5. Go to the *Liturgical Event?* Box and check the box – you can either click on the title or directly on the box.

    a. Click on the *Intention* title or box.

    b. Select from the *Category* box *Intention*.

7. Go to the *Location* section and click on the appropriate location on the list.

8. Click on the *Save* button.

9. Click on the *Set Up Recurring* button. This brings up the *Set Up Recurring Activity* screen:

    a. Enter either the number of times the event is to occur (e.g., 52 weeks for a year -- the ending date will calculate automatically), or the ending date for the event (e.g., the last month, date, year; the number of times the event is to occur will calculate automatically).

b. Click on *Proceed*. When the process is completed a new screen showing the unreserved intentions appears. Check this screen and remove any dates for which you do no want an intention (for example at Easter) by clicking on the *Skip this Event* box.

c. Exit.

10. Go to the *Intentions* screen from the Main Menu to check reserved Intention dates and times.

Step 2 - Enter Intention Information

This is the time to enter the name of the person / group the Intention is reserved for, in addition to other information discussed below.

To Reserve An Intention:

1. From the Main Menu select the *Intentions* screen.

2. Locate the date and time for the Intention you wish to reserve. Use the *Show Available* button to bring up all open dates and times.

3. Enter: Requestor, telephone, stipend, indicate D (deceased) or L (living).

4. Click on the *Save* button.

Annual / Periodic Process

The above steps are meant to be followed the first time a group of Intentions is set up. In subsequent years (or periods) there is an easier process.

1. Go to *Change* from the Main Menu.

2. Click on Intentions.

3. Enter new range of dates by clicking on *Today and Future*.

4. Click on *View List*. Scroll down to end of list. Locate last intention from the last year's (or last period's) series.

5. Click on Change booking.

6. Go to recurring button and recur for another year.

7. Follow above instructions from Step 1 items 9 and 10.

3.4 Other Optional Add-Ons

Other optional add-ons include: Baptismal and Pre-Marital Workshops, and GuestMaster.

Baptismal and Pre-Marital Workshops

The Workshops let you create a list of participants and maintain their status. If desired, you can also maintain an additional planning screen for each set of participants with full baptismal or pre-marital information.

The GuestMaster Option

The Guests function is a separate list of house guests, with their relevant information.

To enter a guest:

1. From the Main Menu select *Guests*.

2. Click on the *New* button.

3. Enter the guest name, arrive date, depart date.

4. Select the *Room / Bed / Ext.* from the pull-down list.

5. Select the *Guest of* from the pull-down list.

6. Click on *Save*.

Other Guest Functions

Print: prints a guest list.
Deletions : to delete a guest from the register simply click on the *Delete* button.
Print Key Notes: prints an envelope to hold key.
Print Sign: prints sign with Guest name for the door.

Locating and Viewing Events

When you wish to view or change scheduled entries already generated by CPS use the *Find, Change or Delete Events* function on the Main Menu.

The screen that appears after you have selected *Find, Change or Delete Events* is called the *Select Which Calendar Activities to View.* screen. Any changes or deletions to existing scheduled items is done **after** the entry has been selected using the Select Calendar Activities screen. Groups of entries such as recurring events may also be selected from here for adjustment or deletion.

Find

As mentioned above the first step in modifying events is to locate, or find the event you wish to change. This is done in four steps:

7. Find the event, or events, using the *Select Types to include* section.
8. Specify the details using specific information, under the *Select Types to include* function..
9. Tell CPS the date, or date sequence, using the *Which Dates..* selection function.
10. View the entry to ensure you have the correct one by selecting the view from the buttons to

the lower right of the *Select Calendar...* screen.

The Select Which Calendar Activities to View Screen

The following is a guide to use to select events for viewing and modifying.

1. **Select Types to Include.**

   1. **Liturgical.** Select the type(s) of event: Intention, Baptism, Wedding, Funeral / Memorial, and / or Ecumenical. More than one type may be selected at a time. To include all types use the *All Liturgical Events* button.

   2. **Non-liturgical.** Select the appropriate type (s): Sponsored Meeting, Outside Rental, Food Request, Guest, Work Order, Workshop, Engaged Couples, and / or Baptism Workshop. More than one type may be selected. To include all types use the *All Liturgical Events* button.

   3. Indicate if you wish to include *Parish Only, Not Parish, Publish Only, Not Publish Only* by clicking on the item so that a circle appears in the box next to the title. See Chapter 3 for an explanation of these items.

   4. **All Types.** Use this short cut when you want to include all events. When All Types is used CPS automatically selects all Liturgical and Non-Liturgical items to view or modify.

2. **Select details to include.** This allows you to specify events assigned to specific rooms, staff and so on. The choices are: Room, Staff, Participants, Presider, and Category. To use click on the arrow on the pull-down menu next to the item, then make your select from the menu.

   a. **Reset - to include all.** Use this feature to include all the detail for all the items mentioned under the *select details to include* heading above.

3. **Which dates do you want to include?** This part of the screen provides further clarification as to the dates you want to include in the view, or to modify.

   a. Enter a range of dates in the boxes under the heading. To view only one date begin and end with that day's date, e.g., 3/1/00 - 3/1/00. To view a month enter 3/1/00 - 3/31/00. Or go directly to item 2.b below.

   2. Click on the box that best describes the date you want to view: The choices are: *All Dates, Today Only, This Week, Next Week, This Month, Next Month, This Year, Today and Future.*

      How this works: If the date shown in the box is today's date and you click on *Today Only* CPS will automatically select the current day's scheduled events. By using *Today and Future* CPS will select every scheduled event from the current day onward.

3. **Viewing your selection**. Once you have specified the criteria for viewing you may view the scheduled events on the screen, in a number of ways:

   View Timeline.
   Print Timeline
   View List
   Print List
   View / Print a Calendar

   A more detailed description of how to print reports is located in Chapter 5.

4. **Changing or deleting the event.**

   a. **Individually scheduled events** are changed from the **View List** mode referred to in item 4.c above. From the View List screen locate the event, and click on *Change Booking* or *Delete*

b. **Batch Changes.** To make changes to a group of common entries select the Batch Change function. Fill in the appropriate *Change From* data and *Change To* data. Make any selections applicable to *Intentions, Publish* and / or *Parish*, then click on **Proceed** to finish.

A Note on Batch Changes to Intentions, Publish, Parish

The choices here are: *No Change, Set to On, Set to Off*.

No Change. The No Change flag is self explanatory.

Set to On. Flags every event in the set you're changing to be an Intention, or Publish, or Parish, depending on which you selected. You may one, all three, or any combination thereof.

Set to Off. Flags every event in the set you're changing from an Intention, or from a Publish, or from a Parish, depending on which you selected. You may change just one, all three, or any combination thereof.

There are two way to print reports from CEP. One way is to print the report directly from the screen you are working in, and the other is to go to the Reports feature from the Main Menu. The following briefly explains the difference. The remainder of the Chapter will deal with printing reports specifically from the Reports screen.

Printing Event Information vs. Lists

Most detail screens and list screens have a *Print* button that will print the report appropriate for that screen. So if you want to print the full details of a particular wedding, for example, then you should go to the screen displaying that information and use its *Print* button. You use the same procedures to locate information, whether you want to edit/delete the event's data, or to print it.

Information Reports that Print From the Details Screens

Basic Event
Print a Calendar

Liturgical Events
    Intention Liturgy
    Baptism Details
    Baptism Letter
    Wedding Details
    Wedding Letters
    Wedding Certificate
    Funeral / Memorial Details

Non-Liturgical Events
    Sponsored Meeting Details
    Outside Rental Detail
    Outside Rental Letter
    Outside Rental Contract
    Food Service Request
    Work Order Details
    Workshop
    Workshop with Attendees
    Engaged Couple Details (1 couple)

Baptism Workshop

How to Print a Calendar

Calendar printouts are done from the *Change* option off of the Main Menu.

Here are the steps:

5. From the Main Menu select *Change*

6. At the *Select Calendar Activities* screen select the desired events and dates to include on the calendar.

7. Click on the *View / Print a Calendar* button.

8. Choose:

    1. paper size, letter or legal

    2. row-size, two weeks per page or five weeks per page

    3. start date -- this is a different date than the one selected on the *Select Activities Screen.-* It determines the starting box date of the calendar boxes, for example if you want to start the calendar on a Sunday, which may not be the first of a month, enter that date Note that setting the First Day of Week and Select a Month automatically sets the Starting Date for you.

       The *Plus 2 Weeks* feature – this is a shortcut to the *Adjust Start Date* function, when used it automatically adds two weeks the starting date.

    4. month

    5. year

    6. show names of special days (Christmas, et cetera), if applicable

    7. view or print the calendar

Printing from the Reports Screen

The *Reports* function (accessed through the Main Menu) lets you select various types of report *lists*, for any range of dates -- as opposed to printing details for one event.

The *Select a Report* screen lets you select various types of report lists, for any range of dates.

If you Preview the report you can see the number of pages as well as the layout and information. The page numbers are at the lower left; go directly to the last page by clicking on the right-arrow that has the vertical bar. Also, you can print a range of pages from the Preview: select File then Print from the pull-down menus at the top of the screen. On the Preview, a click on the report alternates between shrinking and expanding the view.

Every event has a *Publish?* check-box and a *Parish?* check-box on the Book/Edit-a-Room screens. You can utilize this on the Events List - Medium and the Events List - 1 line reports on the *Select a Report* screen, by specifying to only include the checked events. This is useful for printing out event lists for a newsletter, for example, where you only want certain events to be published (You may, however, find these indicators useful for some other purposes as well).

Reports that print from the Reports Screen are:

Baptism List	Liturgy Schedule
Events List - 3 to 4 lines	Marriage List
Events List - 1 line	Outside Rentals
Ecumenical List	Sponsored Meetings
Engaged Couples List	Timeline Listing
Food Requests	Work Orders
Funeral List	Workshops
Guest List	Workshops with Attendees
Intentions	

1. From the report list highlight the desired report with a click of the mouse.

2. There are two ways to choose the date(s) range for reports.

   a. From the Select Date-Ranges column select one:

All Dates	Prints all events for all dates in the computer, past and present.
Today Only	Prints the events set to occur on the current date.
This Week	Prints events coming up this week.
Next Week	Prints events coming up over the next week.
This Month	Prints events coming up over the next month.
Next Month	Prints events coming up over the next week.
Today and Future	Prints all events from today's date to all future scheduled events.

   Note: Date ranges, except for the *All Dates* selection, print from the current date to the date at the of the range selected, e.g., if it is Tuesday May 6 and *This Week* is selected the report will include the events dated From May 6 through May 13.

   b. You can also obtain a report by entering the range of dates you desire in the *Range of Dates* area.

Starting	Enter the date to begin printing events.
Ending	Enter the date to end printing events.

   To print one date enter the same starting and ending dates: e.g.,1/1/00-1/1/00.
   To print a week enter starting date 1/1/00, and an ending date 1/7/00.

3. Print the report by selecting either the *Print Preview* or *Print* button. The *Print Preview* will show the report to the screen, while the *Print* selection will print the report to hard copy.

Even if you prefer using the mouse, there are certain keystrokes you should know for the most effective use of your ZLC Ministry Scheduler. For example, you may find it far easier, when you arrive at a pull-down lookup box, to just press F4 than to click on the tiny pull-down arrow. Also, if you are working on the same data column in a list-view, you should know that CTRL-DOWN/UP moves to the next/prior employee without moving the cursor away from that data field.

Two major window-types

There are two different ways your data may be displayed, depending on the current context.

22. **List-windows** show multiple records at once, and you can use a vertical scroll-bar on the right side to move through them. Each record usually has a small [1]"record-selector" button at its left end (used for selecting sets of multiple records and for dealing with whole records: for cutting and pasting operations, for example).

23. **Record-windows** show a single record at a time -- as if each is a page in a book and you can only see one page at a time. There is no vertical scroll-bar, and usually no "record-selector" at the left.

The same information records can be shown in either type of window. And any particular window may not show all of the record's data, i.e., a summary list may just have dates and titles, whereas a full-screen view may show all of the detail.

While the appearance is very different, you will be dealing with these views in similar ways. When you change any data, it does not mailer which view you are in: if you change the starting time in a list window, that same event will have the new starting time henceforth in every other view and report.

When moving among multiple records, there is a "Ditto" function available: in any cell you can enter Ctrl-" or Ctrl-' to duplicate the contents of the same cell in the previous record.

Both types of windows use the "record-navigation" buttons at the lower left of the window to step through the records, or to go directly to the first or last record of the set. Both also allow you to move through the records using Ctrl-PageUp / Ctrl-PageDown keys.

Moving around on a screen or a list

Note that the Scheduler screens contain Labels and Data, and that not all data can be changed. If the field background is white, that usually indicates data that can be changed. The Read-only data is presented for information, but usually must be changed on another, more basic screen (where it can be updated to all the various levels appropriately).

1. To move between the active data fields on a screen/form use:

   DOWN or TAB or ENTER to move forward to the next field;
   UP arrow or SHIFT-TAB to move back one field.
   TAB and SHIFT-TAB are the recommended way to move from field to field.

   Note that if you use the mouse and click on a field you usually end up in the middle of a field in Edit-Mode. For replacing the field contents, it is more efficient to click on the prior field then switch to the keyboard and TAB into the desired field. Then you can either type new information in immediately, or use F2 for Edit Mode.

2. To move to the next/prior employee (or next/prior History record) use PGUP/PGDN or CTRL-PGUP/DN. Or, you can use the *"record-navigation"* buttons at the lower-left of every window: these will take you to the first, previous, next, and last record respectively. Also, you can push F5 then type in a record number to go directly to that record.

3. You can also locate a particular record by using the *Find* function. You should first enter the field you want to search on, then push CTRL-F (or use the Edit-Find menu) and fill in the pop-up window as appropriate. (Use ESC key to remove the window. Use CTRL-F then ALT-F to do a Find-Next -- or use F3.)

Editing within a field

1. When you first enter a field, the contents are highlighted. At that point you can use Edit - Cut / Copy Paste, or if you type new data the old disappears (to make it reappear, push Esc before exiting that field). Shift-Insert / Shift-Delete are the same as cut and paste.

2. To edit that pre-existing data (instead of over-writing it) push F2 to enter Edit-Mode. (Use F2 again to EXIT Edit-Mode and stay in the same field).

3. In Edit-Mode:

    LEFT arrow moves left one character;
    RIGHT arrow moves right one character;
    Ctrl-LEFT arrow moves left one word;
    Ctrl-RIGHT arrow moves right one word;
    HOME moves you to the far left end;
    END moves you to the far right end;
    ENTER leaves the field and moves you on to the next field.
    ESCAPE returns the contents to the starting point (you lose all the changes you have made).

    Special considerations for editing inside a MEMO (multi-line) Box:

    Ctrl-ENTER starts a new line (ENTER exits the field!);
    Ctrl-HOME arrow moves to the upper left corner;
    Ctrl-END arrow moves to the lower right corner;
    ESCAPE returns the contents to the starting point (you lose all the changes you have made).

Entering / editing dates

You enter dates by typing MMDDYY - the rest is entered for you automatically. If you just use two digits for the year, ZLC's Calendar programs will assume 19yy for years 25 to 99 and assume 20yy for years 00 to 24.

Pull-down lookup lists

Whenever you get to a field with a pull-down arrow at the right end, it may be easier to open the lookup list by using either your F4 or ALT-DOWN keys than to reach for the mouse. And whether the list is open or closed, when you start typing each letter will search for and present the first matching item from the list. As soon as you have the desired match, use TAB or Enter to move to the next field (or Ctrl-PageUp/Down to move to the next record - same field). Some situations allow you to enter information that is not on the Lookup List, others enforce a match. If you must make an entry that is not on an enforced list, you must contact the system administrator to alter the Lookup Table.

Adding and deleting records

In ZMS the ADD is automatic. If you make any entries at all, when you leave the record it is automatically saved. If you use the Save button on such a new record but then decide you do not want it (while you are still in that record), you can use the Delete button to remove it. You will get a message that it has been deleted, and end up with a new empty screen.

To delete a previously added event you locate that event in the LOCATE / CHANGE function and then use its Delete button. All of its attendant records detail will automatically be deleted as well.

We include with EPS two different data files: CCDATA14.MDB and CCXMPL14.MDB. The former is empty of services and individuals, and the latter has many entries illustrating all the ways the Scheduler handles various types of events.

We recommend you spend time with the sample data viewing all of the various services. It will be much clearer how to set up your own data after you are more familiar with the various features that are available.

Switching between the sample data file and your own data

The Scheduler program can only be connected to one of these data files at a time. When you are ready to set up and use the system with your own events, you will need to attach the Scheduler program to the CCDATA14 file. Then if you later wish to view the examples again, you will attach to the CCXMPL14 file.

You accomplish the switch in SETUP. To attach to CCDATA14 use the CHANGE COMPANY button, and fill in the screen as follows:

File Name:CCDATA14
File Path:C:\CCAL

then click on REATTACH and wait for the system message that it has completed the process.

Then to switch back to the example data, you just substitute CCXMPL14 as the file name above. You can switch between those two data files as many times and whenever as you wish.

If you attempt to leave a record or a screen that contains invalid "key" data - the information used to link various parts of the system - then you might receive one of the following two error messages.

Index or primary key can't contain a null value.

This message indicates that an important piece of information has been left blank.

Duplicate value in index, primary key, or relationship.
Changes were unsuccessful.

This message indicates that a field - or combination of fields - already exists and that the new record is attempting to create a duplicate that is not allowed.

In either case, if it is not apparent how to correct the problem, you can always use the ESC (Escape key) to undo the changes you have just made. This puts the system back into an acceptable state. EPS simply always insists on "good" data before saving any record - and this assures you that you will always have an accurate and properly structured set of information.

User's Guide Addendum for the
ZLC Catholic Calendar Deluxe Edition

This addition to the ZLC Catholic Calendar User's Guide covers each of the new features found in the Deluxe Edition.

A. Locations and Sites

B. Room List Setup

C. Multi-Purpose Rooms

D. More Calendar Presentation Options

E. Changes to Booking Screens

A. Locations and Sites

You now can track activities by Location (usually different street addresses) and by Site (different buildings). When you set up your ROOMS lookup list you will find that it requires every room to have a Location and a Site. So if you only want to use one location, you need to set up that location as the only one on the system's LOCATIONS lookup list. Similarly, you need only set up on the SITES lookup list each building to be tracked.

Note that you cannot delete any location or site that still has any rooms (or equipment or vehicles) utilizing it. You must first delete any rooms or resources that are using the sites/locations to be deleted.

Now when you book an event, you specify the room and it will automatically know the location and site of the event. Then when you go to SELECT events, you can specify locations and sites as well as all the other options.

B. Room List Setup

The ROOMS LIST lookup list now requires not only a unique Room code, but also each room must have a valid Location and a valid Site. Also, it must have a "Venue" specified, as to type of usage(s) you expect his room to have. Then the booking screen will know which rooms to list, based on the type of event you are booking — then, for example, when booking a wedding you will not have to look through the entire list of every room to find "Main Church".

C. Multi-Purpose Rooms

There are a few different ways to set up any multi-purpose rooms, but here is the way we recommend. First, define every way in which you will want to book a single event. This will include all of the smallest separate "individual" room that you can set up, plus every room that is a combination of those smaller rooms (made by combining those individual rooms in various ways). Second, you will "link" those rooms to tell the system how you need the conflict-checking done. Go to each room you have defined that is a combination of smaller rooms, and click on its LINKED ROOMS button. On that screen add all of the smaller individual rooms involved. This tells the system that when you book the larger "combination" room, the other smaller rooms are being booked as well.

As an example, let's say that you have a large hall that can be divided into four separate rooms. We will call the rooms H1, H2, H3, and H4. In addition to booking any of those four, you can also book H12 which is a combination of H1 and H2; you can book H34 as a combination of H3 and H4, and you can book the entire hall, which is a combination of H1, H2, H3, and H4. To set up this scenario, in your Rooms List you would set up HALL, H1, H2, H3, H4, H12, and H34. Then you would go into H12 and under its LINKED ROOMS list H1 and H2. Then go into H34 and under its LINKED ROOMS list H3 and H4. Finally, go into HALL and under its LINKED ROOMS list H1, H2, H3, and H4.

Note that none of the "combination" rooms ever get listed as linked-rooms; only the small individual rooms go under linked-rooms.

Now when you book an event, you specify the room and it will automatically take care of all the conflict-checking needed for all of those combinations of usages.

D. More Calendar Presentation Options

The Deluxe Edition gives you a lot more choices on what to show on your calendar printouts.
Under SELECT DETAILS TO INCLUDE, the new options are:

Short Title:	This puts the Event-Start Time, Room, and a truncated Title onto a single line. With this option you can fit up to 33 events per day in the calendar box.
Title:	This puts the Event-Start Time and Room onto the first line, and the Title on the second line. With this option you can fit up to 16 events per day on the calendar.
End Time:	This puts the Event-Start Time, Event-End Time, and Room onto the first line, and the Title on the second line. With this option you can fit up to 16 events per day on the calendar.
Room Times:	This puts the Room-Start Time, Room-End Time, and Room onto the first line, and the Title on the second

line. With this option you can fit up to 16 events per day on the calendar. The Room-Times are the Setup start and Cleanup end times.

Short Equipment: This puts the Event-Start Time, Room, and a truncated Equipment Code onto the first line, and the Title on the second line. With this option you can fit up to 16 events per day on the calendar.

A new added section is the SORT EVENTS BY. Here you can elect to have each day's events presented either by Start Time, or by Room then Start Time.

At the right are a set of new options for adding additional information fields to the above selections. Each option you specify adds at least one additional line to each event that has data in that field. For example, if you specify ADD NOTES2 then each event that has anything in its second NOTES field will have that entire note printed on the calendar. Clearly you must be careful in using these options, since you will no longer know how many lines each event will take up. If you plan on printing a Note field on your calendars, then you should be careful to limit the length of those Notes when entered.

The final option, SHOW SPECIAL DAYS, will look up each date on the Calendar in your Special Days list, and if it finds one it prints the Title you've set up for that date.

E. Changes to Booking Screen

The Booking screens have been enhanced in several ways. Not only have we added Equipment and Vehicle boxes, a second Notes box, and a Cleanup interval. We have also added some new ways for you to enter the date and times. You can change the date by simply using your + or - keys. You can enter the duration of the event and let that compute the End Time for you. We let you change the Setup and Cleanup intervals with +/- buttons, and now show the Room-Start and Room-End times.

You can set defaults for the Room, Equipment, and Vehicle boxes. You set the desired defaults in SETUP–SPECIAL LABELS. Note that when you set the defaults there it is setting defaults for Location and Site as well. If you ever change any of the rooms and resources used as defaults, or their Locations or Sites, then you must go back to SPECIAL LABELS and reset your defaults.

Note also that every Event must have a valid Room, Equipment and Vehicle. You should make sure you have a NE for no-equipment and NV for no-vehicle events, and probably will want to make them the defaults. If you are planning to set up a large number of similar events, you may wish to temporarily change the defaults to assist, then change them back wfter that project.

Finally, you can use the Copy Event function (check the box before clicking NEXT) to duplicate all of the main event information as you create a new event.