

# Quick Start For First Time Users of RDS Advantage®


Click on the RDS Icon displayed on your desktop to enter the RDS Advantage system. Enter the username and password assigned to you.

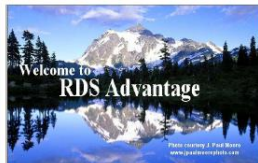


This 'Quick Start for First Time Users' gives you the easy-to-learn basic functions used in the system. Use 'Change' or 'Inquire' mode when you first begin to easily see data already entered.

Tutorials are available for every application. Read the appropriate Tutorial book as you work in the different areas. Follow the instructions and work the exercises in each book.

Call RDS Support at 800-337-6328 with any questions.

Click on the Help Icon  to use the internal Help system for information about every application and feature in the system. More than 1,700 pages of context sensitive help are available. Use the scroll bars to see related help. Use the glossary to find the definition or use of every term used in the system. Use the index to look up any topic - see 'Getting Started' topics.



**RDS Advantage  
Tutorial**

**Member Records**

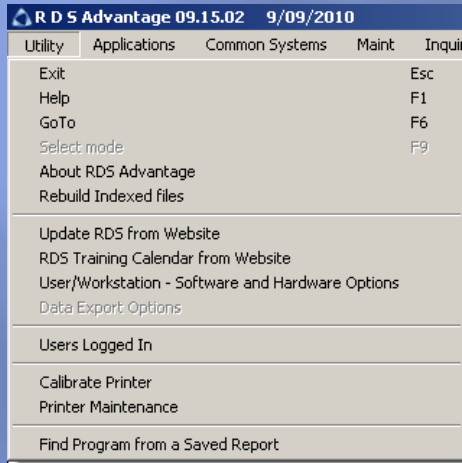
*We believe you will find RDS Advantage to be the most comprehensive, powerful, feature-rich, flexible and best supported management system available.*

# Powerful, Intuitive Desktop Provides Ease of Use



Applications are on top toolbar - listed on drop-down menus

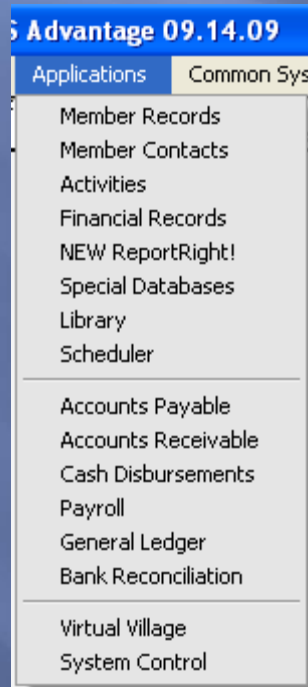
## Utility Menu



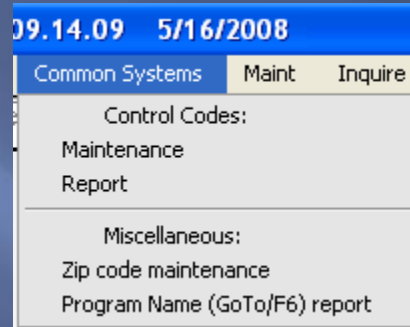
Basic functions are accessed from the Utility Menu, which is always available.

Every major system is quickly accessed from the Applications Menu.

## Applications Menu



## Common Systems Menu

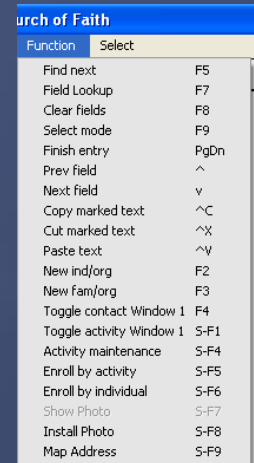


Important user-controlled features are listed on the Common Systems Menu.

Menus are accessed from the pull-down menu by clicking on the name of the application. Use the arrow keys to move left and right across the toolbar to the desired menu, then up and down to the desired application.

Standard Windows keystrokes and functions are used throughout.

## Functions



Applications which are text oriented have a Functions menu.

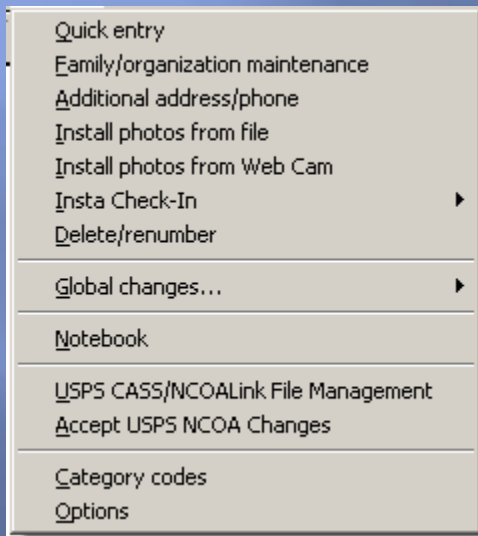
# Consistent Access to Applications

Uniform functionality simplifies processing

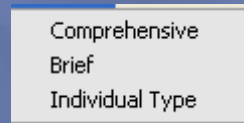


Every major application has three menu columns: (example from Member Records)

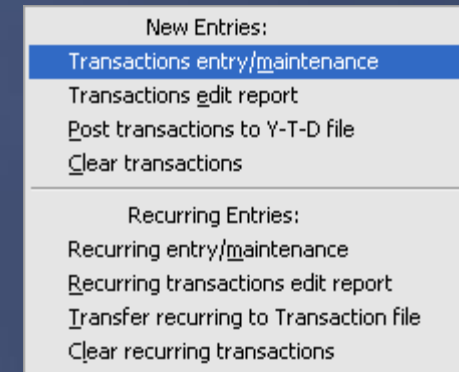
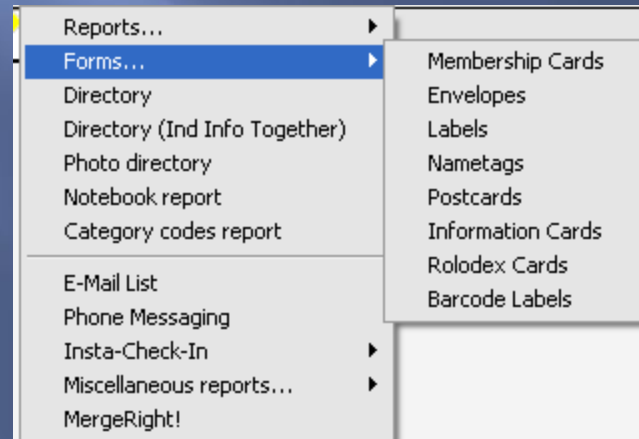
## Maintenance



## Inquire



## Reports



Every major application includes drop-down menus for 'Maintenance,' 'Inquire,' and 'Print' functions.

Accounting functions have an additional menu column for accounting entries.

Standard Windows keystrokes and functions are used throughout.

# Icons Provide Easy, Instant Actions



## The Icon toolbar puts the most often used functions at your fingertip

Icons are carefully selected for functions most often used. They provide the user with convenience and speed. Function keys are displayed so hands can be kept on the keyboard without going to the mouse.

The Icons displayed from “Email” to the left side are the same in all applications.



- EXIT icon, ESC key, and the X all exit to the previous window.



- MODE CHANGE icon permits instant change of mode (inquire, change, add, delete, etc.). Each user's security can be controlled by mode. Click on the icon to change mode at any time, any place. Use of 'Mode' helps prevent entry errors.



- LOOKUP icon pops up a lookup window of the records for the field in which the lookup is made. In every lookup window, you can search for records on the basis of any information displayed.



- FIND NEXT moves you to the first, or next record in the database.



- The GOTO icon takes you directly to any application in the system - instantly.



- CLEAR FIELDS icon removes all entries in the data entry fields. It deletes no data.



- HELP provides instant and easy access to hypertext help. Extensive glossary and 'Tutorial' helps are included.



- The WEB icon takes you directly to the RDS Advantage web site, where you can download files and other helpful information.



- Click the E-MAIL icon to select one or more persons to send an e-mail message.



- If there is a PHOTO for a family, couple or individual selected, the camera icon is black, and their photo can be displayed, printed or printed in a directory.

- When in an application, the icons that are unique for that application are displayed on the right side of the toolbar.

# Special Operating Features



Access the user data in either add, change, inquire, delete, and print modes.

These processing modes are implemented throughout the system for two reasons:

- 1) Operator security may be given or withheld based upon mode of access.
- 2) Data entry mistakes are minimized by the user selecting the mode of access.

The user can switch modes any time during data entry. No need to exit an application -- just click on the Mode Icon (or press the F9 function key).



Throughout the system there are hundreds of data entry fields for which there is a Lookup to select and/or display data. Any data entry field that ends with a three-dot button is a Lookup:

Lookups can be used in several ways:

- 1) Place the cursor in the field and click on the Lookup Icon. All records can be seen by scrolling up or down through the list, or use the PAGE DOWN key.
- 2) Enter all or part of the field. For example, if searching for 'Jones,' enter 'Jones' or any part of the first letters of the name. The system will display records beginning with the text entered.
- 3) Any data displayed in a Lookup window can be searched for any text included in the Lookup. Press CTRL-F to display a field in which to type the text you are searching. The system will move to the first instance of that text. Press the F5 function key to continue searching for the same text.
- 4) Double click the mouse or press ENTER over the record you want to select.

**Remember that every icon function can be made by pressing the function key displayed on the icon.**



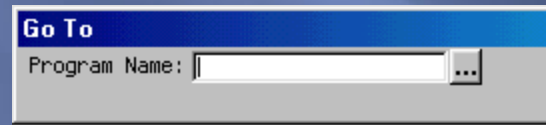
The Find Next function is used to bring up either the first record or the next record. Based upon the application being processed or selected, this is an efficient way to move from record to record.

For example, if in family record number 1025, click on Find Next to bring up 1026. Or if the cursor is in an alphabetical field, it will bring up the next record in alphabetical order.



You can move directly from any application in the system to any other application, without exiting the application you are in. For example, if entering contributions and you come across a contributor who is not in the database, you can 'GoTo' the entry program to enter new people, make the entry, and exit back to the contribution program which is still open to record that new person's contribution.

Click on the 'GoTo' icon to tell the system where you want to go.



Each application window has an identification number at the top. That application identifier can be selected to move directly (see GoTo) to that application from any place in the system.

Window Number

100 Series

200 Series

300 Series

400 Series

Function

Maintenance or data entry

Inquiries

Print and report options

Accounting entry and edit programs

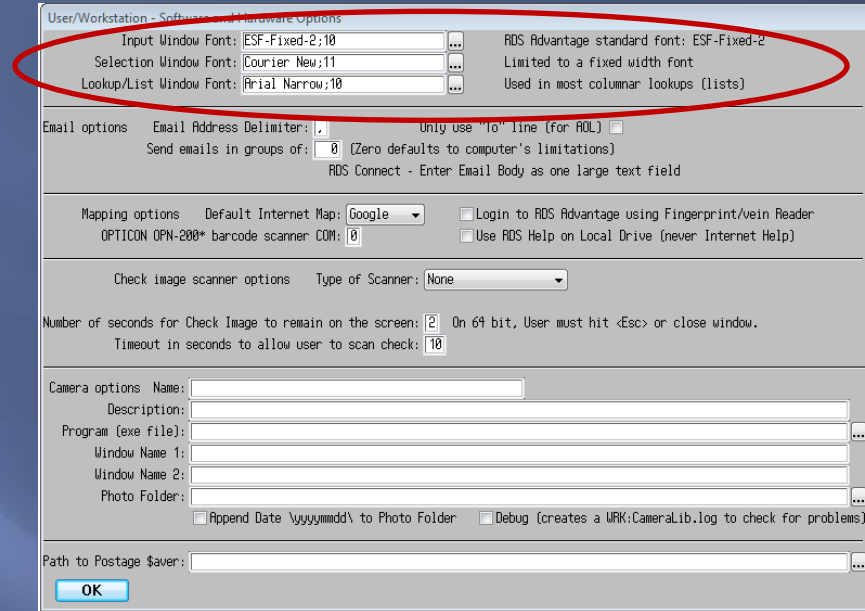
For example,

- MR101 - Member/Visitor maintenance window
- MR201 - Member/Visitor inquiries window
- AC301 - Activities master report selection window
- FR401 - Contribution entry window

# Personalize Your Desktop

## Set Font and Font Size for RDS:

In RDS, under the Utility menu column, select 'User/Workstation – Software and Hardware Options.' The first field in this window is 'Input Window Font.' Click on the Lookup button to see a list of all the fonts on your computer. Select the font you like and the font size. The font size you choose will control the size of RDS Advantage windows.



Click on 'Help' to see a list of attractive fonts. The font you choose will be used in all RDS windows, field descriptions, and data entry fields. You can move an RDS Advantage window around on your desktop. With the mouse, click on the header of the window, hold the mouse key down, and drag the window where you want it.

## Microsoft Windows Settings:

In Microsoft Windows, click on the Start button, select the Control Panel menu, choose Display option, and choose 'Settings.' In Windows7 choose 'Personalization' and 'Display' options.

The higher the resolution, the smaller will be the fonts and appearance of windows. This will control all Microsoft Windows applications.

**Contact RDS Advantage:**

800-337-6328

rds@rdsadvantage.com

www.rdsadvantage.com