Getting Started

ACS Technologies provides premier software solutions for churches and other faith-based organizations.

With over 30 years of experience, ACS has a proven track record in churches, parishes, synagogues, and other faith-based organizations of all sizes. More than 20 modules and utilities form the building blocks of the ACS People Suite, ACS Financial Suite, and companion products such as scanners and printers.

ACS System Requirements

System Requirements

To install our software, your computer should meet the specifications below. Our products have been tested using the recommended system requirements on this page. However, because computing environments and internet service vary so widely, these system requirements are provided without guarantee. Your computer performance will vary based on hardware configurations, network traffic, and local workstation settings.

OnDemand

View the OnDemand requirements, including recommendations for networks.

Desktop Installed

Single PC Recommendations

- **Operating System:** Windows® 8.1 (32-bit and 64-bit compatible)
- **CPU (Processor):** Multi-core
- **RAM (Memory):** 4 GB or greater
- **Internet Connection:** High speed
- **Internet Browser:** Latest, stable version of Microsoft Internet Explorer®, Chrome®, Safari®, or Firefox®
- **Available Disk Space:** 4 GB - Less than 1000 people records; 6 GB - More than 1000 people records
- **Screen Resolution:** 1024 x 768

Server Recommendations

- **Operating System:** Windows Server® 2008; Windows Server® 2008 R
- **CPU (Processor):** 2 GHz or greater with multi-core
- **RAM (Memory):** 4 GB or greater
- **Network Card:** 100 Base T Full Duplex with Switch
- **Available Disk Space:** 2 GB - Less than 1000 people records; 5 GB - More than 1000 people records

Printers

ACS Technologies recommends using a tray-fed laser or inkjet printer that is compatible with the system requirements provided above. Laser and inkjet printers are also suitable if driver support is available for the associated operating system.

Scanners

- We recommend using only scanners purchased from ACS Technologies.
- The MICR Image Reader works only with the desktop version of ACS.

For all software, ACS Technologies recommends using 17-inch monitors, which are designed at 96 dpi. Widescreen monitors may cause some software to look different on a 17-inch monitor, unless dpi settings are modified.

As ACS Technologies moves more products and services to the Web, we recommend a high speed internet connection using the latest, stable version of Microsoft Internet Explorer®, Chrome®, Safari®, or Firefox®. While an internet connection is not required for using the basic features of the ACS desktop products, some are not available without an internet connection. These features include, but are not limited to, the following products and functions:

- Access ACS™
- Facility Scheduler
- ACS Sync
- ACS LiveStor™
- CASS It\!/MAX It\!®
- Sending E-mails via Constant Contact
- Remote Deposit Capture
- Safeguard Background Check processing
- Downloading product upgrades
- Downloading tax updates
- Help Centers

When uploading records and accepting change requests, Access ACS & PDS Connects use Active X controls and requires Microsoft Internet Explorer® as the browser. All other functions in Access ACS can be completed using any recommended browser.

For more information, visit our Help Centers.

Wired Networks

We recommend our products to be installed and operated on a terminal server or on a peer-to-peer network.

Wireless Networks

Our products can function properly in a wireless network environment, however, due to the wide variance of connection speeds, performance may vary and cause the reliability of the software to be negatively affected.

Microsoft End of Life Policy

ACS Technologies adheres to Microsoft's life-cycle policy for operating systems. As a system approaches its end-of-life date, ACS Technologies recommends upgrading your operating system. Once an operating system is no longer supported by Microsoft, we can no longer support that system. This does not mean that

products will not work on a retired operating system, but it does mean that, should a problem occur that would require an update for a retired operating system, we cannot provide support assistance for clients using those operating systems.

Non-Supported Entities

Here at ACS, we must focus our support efforts in areas where our products and services are built. While our dedicated and trained support representatives offer full support for ACS within Microsoft's active operating systems, we cannot offer the same dedicated, full, range of support for every operating system and configuration.

In certain scenarios and configurations, some end users have successfully used ACS in conjunction with the items listed below. However, other support resources may be required to troubleshoot and resolve issues caused as a result of their use. Due to the number of variables involved and other underlying reasons, which rely heavily on past client experience and ACS Technologies testing, the following entities may be deemed as the cause of various issues and might require further end user investigation separate of our own resources:

- Linux servers, either locally installed or Internet-based
- Macintosh/Apple Operating Systems, including those employing the use of Virtual Machine
- Tape backup systems and software, and creation of backups made directly to CD
- Network configuration and troubleshooting, installation, mapping, and rights, sharing and access controls
- MS-DOS, Windows 95, Windows 98, Windows 98 Second Edition, Windows Me, and Windows NT 4.0 workstations or servers
- Third-party Security software, such as anti-virus, firewalls, anti-adware, and anti-spyware programs
- Third-party Microsoft products that interface with file exports past the point of export creation such as Word and Excel®
- Unix servers, either locally installed or Internet-based
- Installation or support of PC Anywhere or other third party remote connection programs
- Installation or removal of software or hardware other than that developed by ACS Technologies
- Formatting of media such as CDs, DVDs, thumb drives, or floppy drives
- Creation of files for import built within other programs or software other than our own
- Hardware-related components, such as video drivers, printer drivers and PDAs.
- Any other open-source software, browsers, or operating systems not developed by Microsoft

Nevertheless, we fully intend to provide the highest quality support for the application aspects of ACS. While some knowledge and experience with the previous entities might exist, our position is to provide complete solutions on those topics for which we have complete and proven outcomes and complete support for how our software and services are designed to work.

Software License Agreement

You can view our Software License Agreement here: http://www.acstechnologies.com/company/privacy-policy

Configuring your Computer and Optimizing ACS Performance

This page provides information about configuring your computer to maximize the performance of ACS.

Consider a professional system assessment prior to installing ACS on your network. In many offices, ACS is the most extensive program in operation, storing critical information and placing far more demands on the workstations and network than routine word processing applications or other office tasks. Hardware professionals can test your network, including certifying cabling, to ensure that it is working properly.

To optimize ACS Performance

- Do not use 3-D screen savers, especially on the server, performance may be adversely affected.
- Virtual memory should be at least 1.5 times the amount of RAM installed.
- Make sure the system has enough available disk space. For specific information about the available disk space necessary to run ACS, see the ACS System Requirements.
- The system should have enough free resources.
- Set power schemes to Never turn off hard disks.
- Set power schemes to Never for System Standby.
- If you have a virus protection program, set it to scan program files instead of all files and turn off scanning for network drives.

For technical information about setting up your computer or network, see the ACS System Requirements. If you have questions along the way, please call Support at 1-800-669-2509 or email Support.

Now that your computer is configured, you can install ACS.

Installing ACS

There are three versions of ACS: Single User PC, Network, and Terminal Server.

In this section, you can learn about installing each version. View information on installing the ACS Mail Modules (CASS It!® and Max It!®).

Installing the Single PC Version of ACS

You must complete this installation process before using ACS on a single personal computer. After installing ACS, you may want to install demo data to help you quickly familiarize yourself with the program. For more information, see Installing Demo and Blank Data.

> **ⓘ Note**
>
> When installing ACS on a Windows 8® operating system, make sure that the **Desktop Icons** option is selected.

⌄ To install the single PC version of ACS

1. Visit the **Downloads page of the ACS Client Portal** to download ACS, and sign in with your **Email**, **Site Number**, and **PIN**. Contact ACS Support at 1-800-669-2509 if you need this information.
2. Select the current version of ACS. Click **Download**, and save the file to your computer.
3. Double-click the .exe file you saved and click **Run**.
4. Follow the instructions on your screen.

Installing the Terminal Server Version of ACS

You must complete this installation process before using ACS on a terminal server network.

> ⚠ **Note**
>
> When installing ACS on a Windows 8® operating system, make sure that the **Desktop Icons** option is selected.

After installing ACS, you may want to install demo data to help you get started using the program. For more information, see Installing Demo and Blank Data.

> ⚠ **Note**
>
> Before installing the Terminal Server Version of ACS, make sure you are not having any problems with communication from the workstations to the server.

˅ To install the terminal server version of ACS

1. Visit the **Downloads page of the ACS Client Portal** to download ACS, and sign in with your **Email**, **Site Number**, and **PIN**. Contact ACS Support at 1-800-669-2509 if you need this information.
2. Select the current version of ACS. Click **Download**, and save the file to your computer.
3. Double-click the .exe file you saved and click **Run**.
4. Follow the instructions on your screen.

Installing the Network Version of ACS

Installing ACS on a network consists of installing the database on the server, then setting up the administrative and individual workstations. You should have permission to read, write, and delete the following folders:

- X:\ACSNET
- C:\ProgramData\ACSTechnologies
- C:\WINACS

ⓘ **Useful Information**

To create an administrative workstation on the server, select the **Install an administrative workstation on the server** check box when running the install.

To install the database on the server

1. Visit the **Downloads page of the ACS Client Portal** to download ACS, and sign in with your **Email**, **Site Number**, and **PIN**. Contact ACS Support at 1-800-669-2509 if you need this information.
2. Select the current version of ACS. Click **Download**, and save the file to your computer.
3. Double-click the .exe file you saved and click **Run**.
4. Follow the instructions on your screen.

⚠ **Note**

When installing ACS on a Windows 8® operating system, make sure that the **Desktop Icons** option is selected.

After installing the database on the server, you will need to share the ACSNET folder. This way, you can map your workstations to the server and run the install file.

To share the ACSNET folder

1. On the server, right-click the ACSNET folder (located in C:\).
2. Select **Share with**, then select **Specific people**.
3. For each user that will be using ACS, select **Read/Write** under **Permission Level**.
4. Click **Share**, then click **Done**.
5. Right-click the ACSNET folder again, then click **Properties**.
6. Click the **Sharing** tab, then click **Advanced Sharing**.
7. Click **Caching**. Select **No files or programs from the shared folder are available offline**.
8. Click **OK**, click **Apply**, then click **OK** again.

Once you share the ACSNET folder, you can map your workstations to it and install ACS.

To map a workstation to the ACSNET folder

1. Map a network drive.

   a.) **_Windows 7 and Windows Vista:_** On your Windows desktop, click the Start button 🟦 in the lower-left corner of the screen. The Start menu displays. On the right-hand side of the menu, right-click **Computer**, and select **Map network drive**. The Map Network Drive window displays.

b.) ***Windows 8.1:*** On the Windows desktop, click the Start button ⊞ in the lower-left corner of the screen. The Start screen displays. Right-click **This PC**, and select **Map Network Drive**. The Map Network Drive window displays.

2. Select the drive letter you want to use.
3. Click **Browse**, then select the ACSNET folder on your server.
4. Click **OK**, then click **Finish**.

> ⊘ **Tip**
>
> You can configure ACS using a mapped drive or by accessing UNC (Universal Naming Convention).

When your workstations are mapped to the ACSNET folder, you can install ACS on each one.

˅ To install ACS on individual workstations

1. On the Windows desktop, double-click **This PC**.
2. Open **ACSNET**.
3. Double-click the **INSTALL.exe** file.
4. Follow the instructions on your screen.
5. Repeat Steps 1 - 4 on each computer you want to set up as an individual workstation.

Installing Add-On Modules

If you are installing an add-on module on a network, you must install the module on an existing ACS administrative workstation.

Installing the Add-On Module

When you purchase an add-on module, a new registration key for your ACS software is provided to you. Enter the registration key during the installation of your new modules.

To install add-on modules in Windows 7

1. On the Windows taskbar, click **Start**.
2. Click **Programs** > **ACS Technologies** > **ACS Tools** > **Add New Modules**.
3. Enter the client registration information, then follow the on-screen instructions.

To install add-on modules in Windows 8

1. On the Windows desktop, click the Start button in the lower-left corner of the screen. The Start screen displays.
2. Click the arrow button . The Apps view displays.
3. Click **Add New Modules**.
4. Follow the instructions as they display. When prompted to enter your **Registration Information**, enter the **Registration Key** you received when you purchased the new modules.

> ⚠ **For those using 60-Day Evaluation versions**
>
> The software automatically expires 60 days from the day you install it.
> 60-day evaluations use your current ACS live data.

Installing Demo and Blank Data

A great way to learn ACS is to install the demo data included on the ACS installation CD. You can experiment with ACS software using sample data instead of your real data. When you are ready to start working in ACS, you can install blank data from the ACS Installation menu, customize the program for your organization, and enter your data. If you have the network version of ACS, you need to coordinate with other users when demo data can be loaded and when you go live with your own data.

> ⊘ **Caution**
>
> Installing demo data or blank data overwrites your existing data.

˅ To install demo data using the network version of ACS
1. Open the ACSNET folder on your C: drive. This is the shared folder on your network that houses your ACS data.
2. Open the UTILS folder.
3. Double-click **InstData.exe**.
4. Under **Module**, select **People** or **Financial**.
5. Under **Data Type**, select **Demo**. Click **Restore**. Click **OK**.

˅ To install demo data using the single PC version of ACS
1. Open the WINACS folder on your C: drive.
2. Open the UTILS folder.
3. Double-click **InstData.exe**.
4. Under **Module**, select **People** or **Financial**.
5. Under **Data Type**, select **Demo**. Click **Restore**. Click **OK**.

Installing the Report Designer Tutorial

If you own Report Designer, ACS Technologies recommends that you install the Report Designer Tutorial and complete it before using Report Designer. The tutorial includes a tutorial version of Report Designer, a PDF file, and sample data that you can work with.

˅ To install the Report Designer tutorial

1. Open the **Run** window.

   a.) ***Windows 7 and Windows Vista:*** On your Windows desktop, click the Start button in the lower-left corner of the screen. The Start menu displays. In the search box, located at the bottom of the Start menu, type **run**. Click **Run**. The Run window displays.

   b.) ***Windows 8.1:*** On the Windows desktop, right-click the Start button in the lower-left corner of the screen. A Windows context menu displays. Click **Run**. The Run window displays.

2. In the Open field, type **X:\RDtutorial\setup.exe**. If your CD-ROM drive has a different drive name, substitute X with the appropriate letter. For example, **E:\RDtutorial\setup.exe**.
3. Click **OK**.

Activating Your Access ACS Account

Access ACS is a Web-based application that connects to your ACS People Suite data. This allows your staff, lay leaders, and members to manage their information online.

If you have an Access ACS account, follow these instructions to activate it.

˅ To activate your Access ACS account

1. Log in to the ACS People Suite or the ACS Financial Suite.
2. On the **Online Resources** menu, click **Access Your Data Online**.
3. The Access ACS Web page displays. At the bottom of the page, click the **Sign Up for Access ACS** button.
4. Follow the instructions to activate your account.
5. Once you activate your account, ACS Technologies sends an email with your user name and password along with detailed instructions on using Access ACS.

Activating Your LiveStor Account

LiveStor is a remote backup application that protects your valuable data by automatically archiving important files according to the schedules you set. The archived files are securely transferred over the Internet and stored on our remote servers.

˅ To activate your account

1. Log in to the ACS People Suite or the ACS Financial Suite.
2. On the Online Resources menu, click **Backup Files Online**.
3. In the right side of the window, click **Sign up today!** and follow the instructions to activate your account.

Anti-Virus Software and ACS

> ✅ **OnDemand Customers**
>
> If you use OnDemand, view information on setting exclusions in your anti-virus software.

If you are using anti-virus software, set up an exclusion or an exception within your anti-virus software for the following folders:
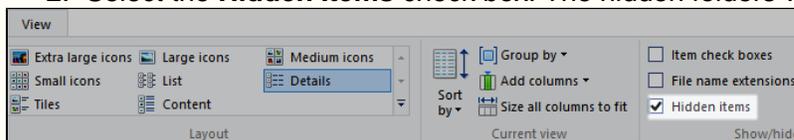
- **ACSNET** - located on your network drive
- **WINACS** - located on your C drive
- **ACS Technologies** - located in C:\ProgramData

> ⚠️ **Hidden Files**
>
> If any of these folders do not display, they may be hidden files.
>
> ### ˅ To show hidden files on Windows® 8
> 1. In the File Explorer window, click **View**.
> 2. Select the **Hidden Items** check box. The hidden folders will display.
>
>
>
> ### ˅ To show hidden folders on a Windows® 7
> 1. In the Windows Explorer window, click **Organize**.
> 2. Click **Folder and search options**. The Folder Options window opens.
> 3. Click the **View** tab. Under **Hidden files and folders**, select **Show hidden files, folders, and drives**. The hidden folders will display.
>
>
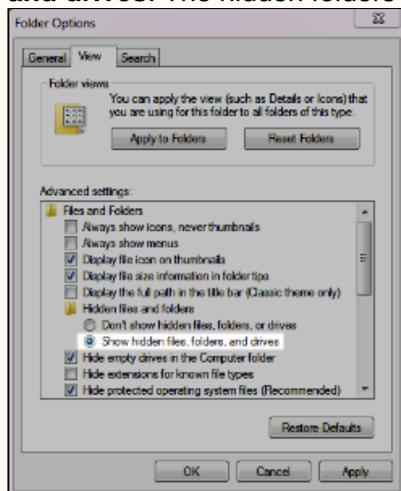
You should also set up an exclusion or an exception for the following programs, all located in C:\WINACS:

- acspe.exe
- acsfin.exe

- awupdater.exe
- awback32.exe

Sometimes anti-virus software incorrectly flags a trusted file as a harmful file. Since this may occur with these files and folders, setting up an exclusion or an exception prevents your anti-virus software from taking action against them.

> ⓘ **Folder Permissions**
>
> In addition to setting up exclusions within your anti-virus software, you also need to set permissions for certain folders.

Uninstalling ACS

You can uninstall ACS if you need to. Be sure to back up your data before uninstalling ACS.

To uninstall an ACS workstation

1. Open **Uninstall ACS Workstation**.

   a.) _**Windows 7 and Windows Vista:**_ On your Windows desktop, click the Start button in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **Uninstall ACS Workstation**.

   b.) _**Windows 8.1:**_ On the Windows desktop, click the Start button in the lower-left corner of the screen. The Start screen displays. Click the arrow button . The Apps view displays. In the ACS Technologies section, click **Uninstall ACS Workstation**.

2. Enter the password that displays exactly as it appears, and click **Uninstall**.
3. Follow the instructions as they display.
4. After the uninstall is complete, restart your computer.

Installing ACS Software Upgrades and Minor Revisions

Ready to install the latest version of ACS? Select the loading instructions you want to view below.
You can also read the latest version of ACS release notes prior to installation.

˅ If you are not sure which version you are using

1. Open and log in to ACS People or Financial Suite.
2. On the toolbar, click **Help** > **About**.

Your version number is displayed below the product trademark. See the image below.
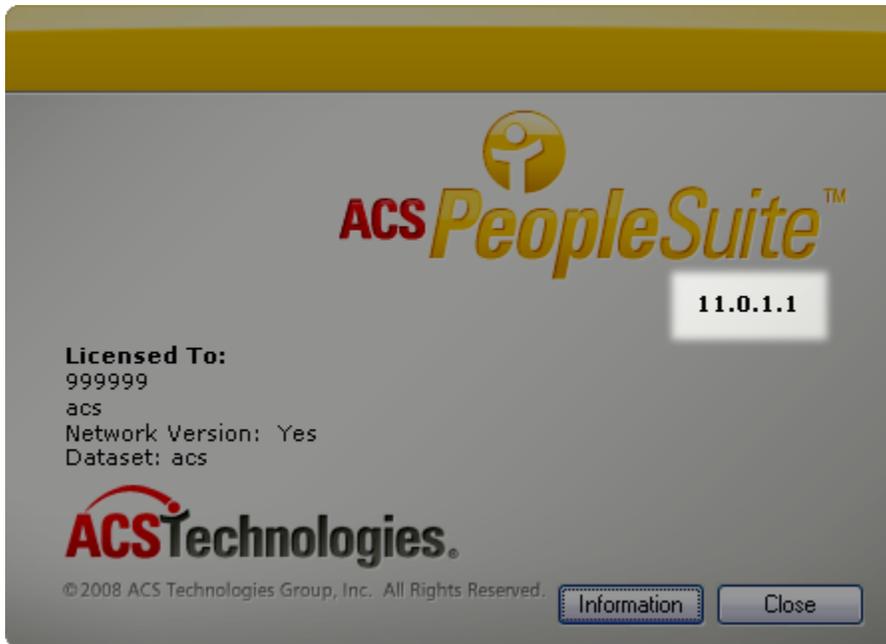
Standalone Loading Instructions

Before you load the latest update to your ACS software, exit ACS, and make a backup of your ACS People Suite and ACS Financial Suite data. Save this backup to a secure location, such as a local or network drive storage, or other external media such as a flash drive or CD. Backups should not be stored within ACS directories (WINACS folder).

˅ To download and install the update

1. Visit the **Downloads page of the ACS Client Portal** and sign in with your **Email**, **Site Number**, and **PIN**. Contact ACS Support at 1-800-669-2509 if you need this information.
2. Select the current version of ACS. Click **Download**, and save the file to your computer.
3. Double-click the .exe file you saved and click **Run**.
4. Follow the instructions on your screen.

When you are finished, make another backup of your ACS People Suite and ACS Financial Suite data. Make sure to include the new ACS version number as part of the file name, and save this backup with the others for safe keeping.

Network Loading Instructions

Before you load the latest update to your ACS software, all users must exit ACS. You must also create a backup of your ACS People Suite and Financial Suite data. Save this backup to a secure location, such as a local or network drive storage, or other external media such as a flash drive or CD. Backups should not be stored within ACS directories (ACSNET or WINACS folders).

The workstation from which you upgrade the server is updated as part of the server upgrade process. For other workstations, the first time a user logs into ACS after the server is upgraded, the workstation prompts the user to load the upgrade. When this prompt displays, click **Yes** to upgrade the workstation.

> ⊘ **Tip**
>
> If you are running the ACS Scheduled Backup Service, the update will load more quickly if you load it from the workstation hosting the backup service.

˅ To download and install the update on a network

1. Visit the **Downloads page of the ACS Client Portal** and sign in with your **Email**, **Site Number**, and **PIN**. Contact ACS Support at 1-800-669-2509 if you need this information.
2. Select the current version of ACS. Click **Download**, and save the file to your computer.
3. Double-click the .exe file you saved and click **Run**.
4. Follow the instructions on your screen.

Upgrading Workstations Before Logging In

You can also upgrade all workstations before users log into ACS.

˅ To upgrade a workstation before logging in

1. Open the **Run** window.

   a.) ***Windows 7 and Windows Vista:*** On your Windows desktop, click the Start button 🟦 in the lower-left corner of the screen. The Start menu displays. In the search box, located at the bottom of the Start menu, type **run**. Click 🗗 **Run**. The Run window displays.

   b.) ***Windows 8.1:*** On the Windows desktop, right-click the Start button ⊞ in the lower-left corner of the screen. A Windows context menu displays. Click **Run**. The Run window displays.

2. In the **Open** field, type x:\Acsnet\install.exe, then click **OK**. If the \Acsnet directory has a different drive name, substitute the appropriate letter. For example, y:\Acsnet\install.exe.
3. Follow the instructions as they display.

When you are finished, make another backup of your ACS People Suite and ACS Financial Suite data. Make sure to include the new ACS version number as part of the file name, and save this backup with the others for safe keeping.

Getting to Know ACS

Welcome to ACS! The procedures below will help you effectively set up and learn to use your software.

Setting up Site Information

When you install the ACS software, you can enter site information such as addresses, phone numbers, contacts, and e-mail addresses. If you use bulk mailing, this address information is required. People Suite r eports use site information, but Financial Suite reports and statements use the name and address associated with the financial dataset.

Once you add site information, you should not have to edit it unless your organization has a change of address, phone numbers, contacts, or organization e-mail address. However, you can change this information as necessary.

To add site information

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Site/Account Information** and **c**lick **Go** .
3. Enter the requested information.
4. Click **OK**.

To edit site information

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Site/Account Information** and click **Go** .
3. Edit the information as necessary, and click **OK**.

Personal Settings and Customization

You can customize areas of ACS to better suit the way you work.

Your first stop when customizing ACS is the My Preferences menu. On this menu, you can change passwords, select to use the Classic or Workbench Menu, and select alternate row colors for grids, if you want to use those.

After you set up those options, you can set up toolbars to help you access options in ACS easier. This saves you time, because you can place the buttons you use most on the toolbars. If you're new to ACS, you may want to use Tool Tips, which display the toolbar button's name when you place the cursor over it.

> ⊘ **ACS OnDemand**
>
> If you use ACS OnDemand, you can also customize your user experience. To learn more, see Cust omizing OnDemand.

Working with ACS Grids

Many ACS windows use a customizable and flexible grid format to display information. Each ACS grid functions independently of the other, so customizing a grid in one ACS module has no effect on a grid in another.

You can configure ACS grids to display information in a certain order. You can also customize a grid to display specific fields or use certain settings, and to make reading grids easier, you can use alternate row colors.

To configure ACS grids

1. Navigate to the grid you want to configure.
2. Use the following options to configure the ACS grids. Not all options are available in all grids.
   - **Locating** — To locate records in the grid, click in a column and type a keyword. ACS follows your keystrokes to match the search criteria and locate the records. The last column searched in each grid is saved so that the next time the grid is accessed, you can type a keyword without clicking in the same column. To search in a different column in the grid, click in that column before you type.
   - **Sorting** — To sort records within the grid, click the column header. To sort multiple columns at the same time, click the first column header, then press the SHIFT key, and click the next column header. Gray arrows ($\triangledown$ or $\triangle$) display on the column header of all sorted columns. You could use this to sort a list of names into alphabetical order.
   - **Resizing** — To change the width of any column in the grid, click the column separator between the column you want to resize and the column next to it. Holding down the left mouse button, drag the column separator to the right or left.
   - **Moving** — To move a column in the grid, click the column header. Holding down the left mouse button, drag the column header to the new location in the grid.
   - **Selecting** — To select multiple records in the grid (not in a range), press and the hold the CTRL key. Then, click each record you want to select. To select a range of records in the grid, click the first record in the range. Press and hold the SHIFT key and click the last record in the range.
3. When finished, click **OK**.

To customize ACS grids

1. Right-click inside the grid, then click **Customize**.
2. In the Customize window, under **Settings**, select or clear the following options. Not all options are available in every grid.
   - **Wrap Text** — Expands the row vertically to allow all text to display.
   - **Auto Size Column Width** — Adjusts column width to allow additional columns to display within the current grid size.
   - **Show Grid Lines** — Applies line borders to all records.
   - **Use Column Filtering** — Applies a filter to the data that displays in the grid. If selected, a down arrow displays in each column header. Click the down arrow to filter on a single value in the column, or click the Custom option to filter on multiple criteria.
   - **Use Group By** — Allows you to group the data in the grid by any column. When selected, a gray "group by" box displays above the grid. To group similar items together in a tree list view, click the column header and drag it into the group by box. To remove the grouping, click and drag the column header back into the grid.
3. Under **Fields**, select the fields you want to display in the grid. You can use the up and down arrows to change the order in which fields display.
4. When finished, click **OK**.

To use alternate row colors

1. Under Advanced Tools, click **My Preferences**.
2. Under Grids, select **Use Alternate Row Color**.

3. To select a predefined color, click the **Down Arrow**.
4. To define a custom color, click **Lookup** ⊡.
5. When finished, click **OK**.

Working with ACS Passwords

Strong passwords that aren't easy to guess are an important part of your ACS security. Here are some tips for using passwords:

- Don't use familiar names, dates, or other personal data; instead use a combination of characters including letters, numbers, and symbols.
- Don't share your password with others, or use the same one for every program or account.
- Change your password periodically.

Once a password is assigned, only an individual who has security permission for Add/Edit Users can change the password, whether it's their own or someone else's. Passwords can be three to twenty characters long and are not case sensitive.

To change a password

1. Under Advanced Tools, click **My Preferences**.
2. Under Settings, click **Change Password**.
3. Enter your old password.
4. Enter your new password.
5. Re-enter your new password to confirm the spelling.
6. Click **OK**.

Resetting a Password for OnDemand

If an OnDemand user forgets his/her password, a Site Administrator can reset it.

To reset a password

1. On the OnDemand menu, from Utilities, select **User Maintenance**.
2. In the Maintenance window, select the user whose password needs reset.
3. Click **Reset Password**. If the e-mail notifications check box is selected for the user, an e-mail with the new password is sent to that user's e-mail address.
4. To confirm, click **Yes**.
5. When the confirmation message displays, click **OK**.

Setting up a Single User Name for OnDemand, Access ACS, Facility Scheduler, and ACS

You can use a single user name to access multiple ACS products. We suggest you use your OnDemand user name and password to begin the process since it has the most stringent requirements for password creation. Access ACS and Facility Scheduler share the same user name and password so when the information is changed in Access ACS, it carries over to Facility Scheduler.

˅ To use a single user name across multiple ACS, OnDemand, Access ACS and Facility Scheduler

OnDemand

1. If you have not already done so, set up your OnDemand user name and password. Note both the user name and password.

ACS

2. In the ACS People Suite, under **Advanced Tools**, select **Add/Edit Users** and click **Go** .
3. Select the **Login Users Automatically** check box.
4. Highlight the User ID you want to edit. Click **Edit**.
5. In the **Network Login Name** field, enter your OnDemand user name.

> ⚠ **Note**
>
> This does not change your ACS user name but tells ACS to recognize your earlier login to OnDemand as sufficient credentials to proceed. ACS user names are limited to 8 characters, while OnDemand user names are typically longer since they are unique across all users at all sites.

Access ACS & Facility Scheduler

6. In Access ACS, point to **Admin**, then click **Security**.
7. In the user list, click the **User Name** you want to change.
8. Under **User Options**, click **Edit**.
9. Change the user name and click **Save**.

Working with ACS Toolbars

Toolbars display in the ACS menu, and you can use them with either the Classic or Workbench menu.

If you select to hide the Tab menu, you can use the toolbar or the Modules menu on the menu bar to access all areas of ACS.

You can name and customize toolbars to display only the options you use. Each toolbar contains buttons for the main options found in a specific module. For instance, the People toolbar contains buttons for Add/Edit Individuals, Change Family Unit, Mass Change, etc. If you do not have the security to access a particular option, the button does not display in the toolbar. In general, toolbars can save you time accessing options you often use.

You can add a toolbar at any time, or remove a toolbar (removing a toolbar does not delete the toolbar, and you can add it back if you need to).

After adding toolbars, you can customize the buttons that display on them.

To add a toolbar
1. Right-click on the ACS menu bar.
2. Select the module toolbar that you want to add. The module toolbar displays.

To remove a toolbar
1. Right-click on the toolbar you want to remove.
2. Select the toolbar you want to remove.

Additional Field Information

Commands

Categories
Lists the menus that appear on the menu bar.

Commands
Lists the individual commands that you can add to the toolbar.

Options - Personalized Menus and Toolbars

Menus show recently used commands first
Select to display only the most often used options on the menu bar.

Show full menus after a short delay
Select to display all options on the menu bar after a short delay.

Reset my usage data
Click to reset the menu bar to display all options.

Other

Large icons
Select to display larger toolbar buttons.

Show ToolTips on toolbar
Select to display ToolTips (on-screen descriptions) when the pointer pauses over a toolbar button.

Show shortcut keys in ToolTips
Select to display keyboard shortcuts in ToolTips.

Menu Animations
Adds special effects to the menus display.

Working with Toolbar Buttons

Each module in ACS has its own toolbar with a button for each area of the module, but you can add or remove buttons on the module toolbar. You can also add buttons from other modules to the toolbar.

When you add a button to the toolbar, you can place it anywhere on the toolbar. If you decide to add the **Inquiry** buttons from People, Organizations, and Attendance, you can group them together, so you do not have to search for them on the toolbar.

You can also move toolbar buttons to more convenient locations, or you can remove buttons entirely.

To add a button to the toolbar

1. Right-click on the menu bar.
2. Select **Customize**.
3. Click the **Commands** tab.
4. Select the **Category** that contains the button you want to add, and then select the button that you want to add.
5. Drag the button to the toolbar and drop it in the place where you want it.

> ⊘ **Tip**
>
> You can also click the down arrow on the toolbar, click **Add/Remove Buttons**, and then select the command you want to add.

To move a toolbar button

1. Right-click on the menu bar.
2. In the drop-down list, select **Customize**.
3. Select the toolbar with the button you want to move.
4. On the toolbar, select the button that you want to move.
5. Drag the button to the new location on the toolbar.
6. Repeat steps 3-5 for each button that you want to move, then click **Close**.

To remove a button from the toolbar

1. On the toolbar that has the button you want to remove, click the **Down Arrow**.
2. Click **Add or Remove Buttons**. A list of buttons in that toolbar displays.
3. From the list, select the button you want to remove.

Working with Custom Toolbars

To save time, you can create a custom toolbar that contains only the buttons you use on a regular basis. You can select any buttons from any module within the same suite (People or Financial). You can also rename custom toolbars, although you cannot rename an ACS module toolbar.

If you no longer need a custom toolbar, you can delete it. This is different than removing a toolbar. If you delete a toolbar, it is permanently removed from the toolbar area and you cannot display it again in the future. Removing a toolbar removes it from the ACS ribbon but you can display it again in the future.

To create a custom toolbar

1. Right-click on the menu bar.
2. In the drop-down list, select **Customize**.
3. On the Toolbars tab, click **New**.
4. Enter a name in the **Toolbar name** text box and click **OK**.
5. On the Commands tab, select the **Category** that contains the button you want to add, then select the button.
6. Drag the button to the toolbar and drop it in place.
7. Repeat steps 5-6 for each button that you want to add to the toolbar.
8. When you are finished, click **Close**.

To rename a custom toolbar

1. Right-click on the menu bar.
2. In the drop-down list, select **Customize**.
3. On the **Toolbars** tab, select the toolbar you want to rename, then click **Rename**.
4. Enter the name in the **Toolbar name** text box and click **OK**.

To delete a custom toolbar

1. Right-click on the menu bar.
2. In the drop-down list, select **Customize**.
3. On the **Toolbars** tab, select the toolbar that you want to delete.
4. Click **Delete**, **OK**, and **Close**.

Displaying ToolTips on Toolbars

Sometimes you aren't sure what option a toolbar button represents. If you have Tool Tips selected, the toolbar button name displays when you rest the pointer on the button.

To display Tool Tips

1. Right-click on the menu bar.
2. In the drop-down list, select **Customize**.
3. Click the **Options** tab, then select the **Show ToolTips on toolbars** option under **Other**.
4. Click **Close**.

To hide Tool Tips

1. Right-click on the menu bar.
2. In the drop-down list, select **Customize**.
3. Click the **Options** tab, then de-select the **Show ToolTips on toolbars** option to clear the check box.
4. Click **Close**.

Working with the Classic and Workbench Menus

ACS People and Financial Suites contain two main menus - the **Workbench** and **Classic** menus.

Workbench Menu

The **Workbench** menu approaches your ACS duties in a task-based format. On the Workbench menu, actions are grouped by task rather than module, and you can also add shortcuts to the areas of ACS that you use the most. You can access individual and family records easily under Manage Records.

We write all current help, troubleshooting, and training documents using the Workbench menu, so we encourage you to give it a try. Click the images below for some highlights of the Workbench menu.

⌄ To switch from Classic to the Workbench menu
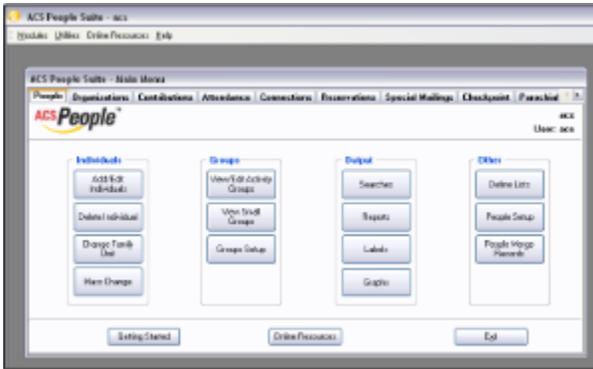
1. On the menu bar, click **Utilities** > **My Preferences**.
2. Under **My Menu Style**, select **Workbench**.
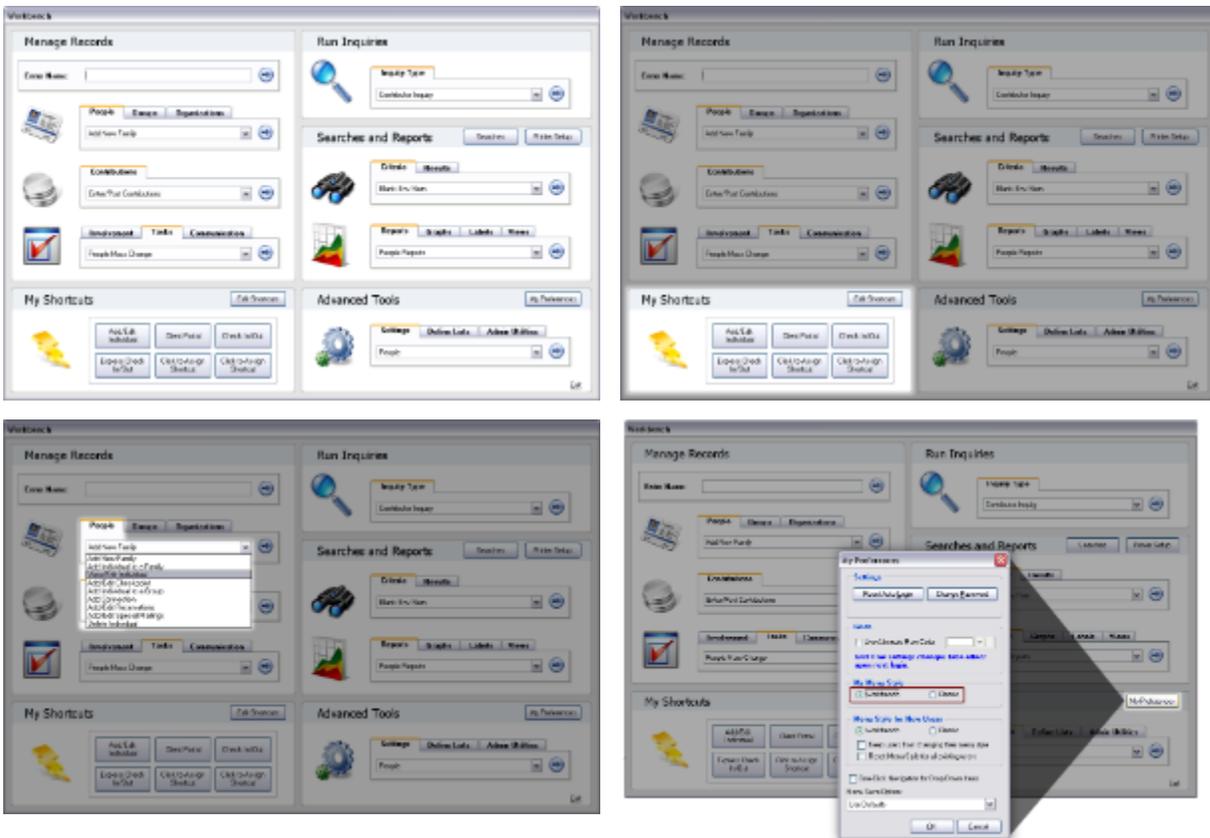
Classic Menu

The **Classic** menu is the original ACS for Windows menu style and groups actions by module. You can still use the Classic menu; however, the first few steps to access your tasks differ.

Click the images below for some highlights of the Classic menu.
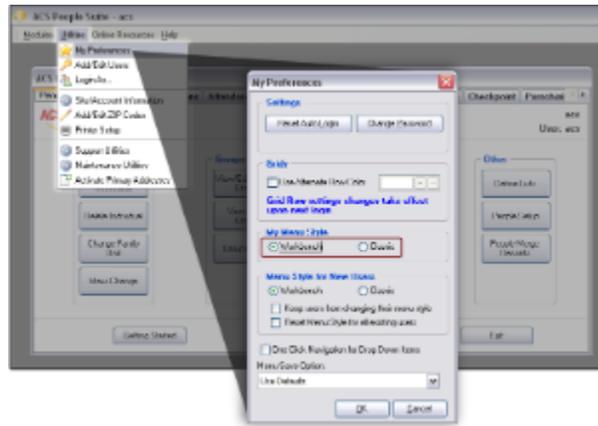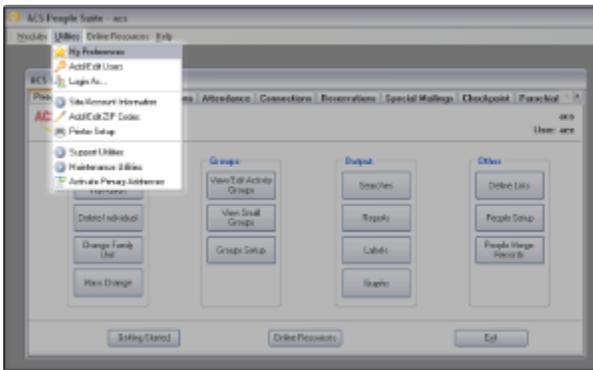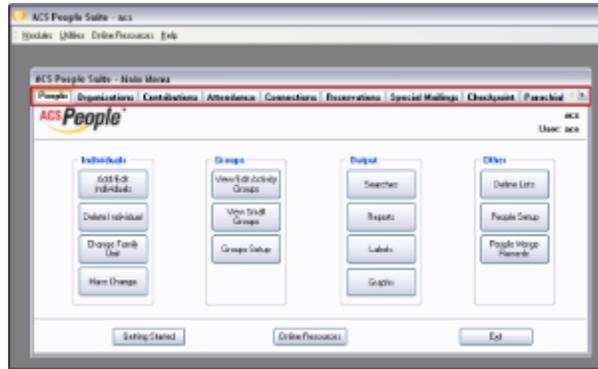
Defining Workbench Menu Shortcuts

Shortcuts are a faster way to access your most frequently used tasks and save you time. Use the Edit Shortcuts window to add, edit, or delete your shortcuts for the Workbench menu. You can define up to six shortcuts for each of the Workbench menus, Financial and People. You can edit a shortcut or its caption, and if a shortcut is obsolete, you can delete it.

To add a shortcut

1. Under **My Shortcuts**, choose a **Click to Assign Shortcut** button. Buttons with names have already been assigned.
2. In the **Action** column, click a **Not Assigned** field.
3. Select the option you want, and click **OK**.
4. In the **Caption** column, enter an alternate name for the option or leave the name as it displays to keep the default.
5. Click **OK**.

To edit a shortcut

1. Under My Shortcuts, click **Edit Shortcuts**.
2. In the **Action** column, click the shortcut you want to edit.
3. Select the option you want for the particular shortcut number and click **OK**.
4. In the **Caption** column, you can enter an alternate name for the option.
5. Click **OK**.

To delete a shortcut

1. Under My Shortcuts, click **Edit Shortcuts**.
2. In the **Action** column, click the shortcut you want to delete.
3. Click **Clear**.
4. Click **OK**.

Working with the My Preferences Menu

The **My Preferences** menu lets you hide or show the tab menu, to change your password, and to reset the auto login option. You can also set alternate row colors for the ACS grids.

You must have the proper security to make changes in or view My Preferences.

˅ To change a password

1. Under Advanced Tools, click **My Preferences**.
2. Under Settings, click **Change Password**.
3. Enter your old password.
4. Enter your new password.
5. Re-enter your new password to confirm the spelling.
6. Click **OK**.

˅ To use alternate row colors

1. Under Advanced Tools, click **My Preferences**.
2. Under Grids, select **Use Alternate Row Color**.
3. To select a predefined color, click the **Down Arrow**.
4. To define a custom color, click **Lookup** .
5. When finished, click **OK**.

Additional Field Information

Reset Auto Login
Click to reset the auto login option. This refers to the option to log in users automatically in Add/Edit Users.

Change Password
Click to change your password.

Show Tab Menu
Select to display the Tab menu. The Tab menu is the main menu for each module. If you select to hide the Tab menu, you can use the Modules menu on the menu bar, or customize the toolbar. This option only displays if you select Classic as your Menu Style.

Use Alternate Row Color
Click to use a color in alternate rows in the ACS grids. To select a color, click the down arrow. Select a color from the list and click **OK**. You can also define a custom color. You can use different alternate row colors in the People and Financial Suites. Alternate row colors are user-defined.

My Menu Style
Select **Workbench** to group options by task, or select **Classic** to group options by module.

Menu Style for New Users

- **Workbench** — Select if you want new ACS users to use the Workbench menu style. Options are grouped by task rather than by module.
- **Classic** — Select if you want new ACS users to to use the Classic menu style. Options are grouped by module rather than by task.
- **Keep users from changing their menu style** — Select to keep ACS users from changing their menu style between Classic and Workbench.
- **Reset Menu Style for all existing users** — Select to reset the menu style for all ACS users.
- **One-Click Navigation for Drop Down items** — If selected, when you select an item in a drop-down list, you go directly to its window.

Menu Save Option
Three save options are available:

- **Use Defaults** — Displays the first item in a drop-down list.
- **Save Configuration when Menu closes** — Saves the last items chosen when exiting and displays them after opening ACS again.
- **Save Current Configuration** — Saves the current configuration. If you exit ACS and then return, your saved options display.

Working with Special Characters in ACS

When entering text in ACS, you can insert special characters.

For example, you may have members with accents in their names, such as a member with the first name Zoë. Inserting a special character ensures this name prints correctly on Contributions Statements and other reports.

You can use the following special characters in any field or report in any Windows® based program. To enter a special character, press and hold the **Alt** button on your keyboard while entering the three corresponding numbers. When you release the **Alt** button, your special character displays.

Use the keystrokes to create the following characters:

Character	Code	Character	Code	Character	Code
~	Alt+126	ì	Alt+141	á	Alt+160
ü	Alt+129	Ä	Alt+142	í	Alt+161
é	Alt+130	Å	Alt+143	ó	Alt+162
â	Alt+131	É	Alt+144	ú	Alt+163
ä	Alt+132	ô	Alt+147	ñ	Alt+164
à	Alt+133	ö	Alt+148	Ñ	Alt+165
å	Alt+134	ò	Alt+149	ª	Alt+166
ç	Alt+135	û	Alt+150	º	Alt+167
ê	Alt+136	ù	Alt+151	¿	Alt+168
ë	Alt+137	ÿ	Alt+152	½	Alt+171
è	Alt+138	Ö	Alt+153	¼	Alt+172
ï	Alt+139	Ü	Alt+154	¡	Alt+173
î	Alt+140	£	Alt+156	÷	Alt+246

⚠ **Note**

If you use the Access ACS Export, XML and SQL may have issues with these characters, so you may not want to use them.

Working with ZIP and Postal Codes

You can add new ZIP/Postal Codes using Add/Edit ZIP Codes. When you enter the Zip Code, ACS automatically enters in the **City** and **State** fields.

You can also use Add/Edit ZIP Codes to change the city and state associated with each ZIP/Postal Code. Changing existing ZIP Code information does not change current addresses in ACS. City and state information for new address entries only are affected.

You can edit ZIP Codes, and delete ZIP/Postal Codes that are no longer needed. However, deleting ZIP/Postal Code information only affects future use. Current address information with the deleted ZIP Code information are not affected.

> ⓘ **Caution**
>
> Since numerous records are changed, we recommend performing a manual backup before editing or deleting ZIP Codes. In addition, deleting a ZIP Code affects all ACS modules and datasets.

˅ To add a ZIP/Postal Code

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. Select **Add/Edit ZIP Codes**, then click **Go** ➡.
3. Click **Add**.
4. Enter the city, state, and ZIP Code.
5. If the ZIP Code is not a United States ZIP Code, clear **USA ZIP**.
6. If necessary, enter the country.
7. Click **OK**.

˅ To edit a ZIP/Postal Code

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit ZIP Codes** and click **Go** ➡.
3. Select the ZIP/Postal Code you want to change, and click **Edit**.
4. Make the necessary changes, and click **OK**.

˅ To delete a ZIP/Postal Code

1. Under Advanced Tools, click the **Admin Utilities**.
2. In the drop-down list, select **Add/Edit ZIP Codes** and click **Go** ➡.
3. Select the ZIP/Postal Code that you want to delete and click **Delete**.
4. Click **Yes**.

Datasets and Utilities

In the ACS Financial Suite, you can create multiple datasets. For instance, you might have a dataset for your church and another for your school. Be sure you understand datasets and how they work before setting up and working in multiple datasets.

ACS also provides several utilities for People Suite, Financial Suite, and OnDemand. Be sure you understand a utility before you use it.

Working with Financial Datasets

In the ACS Financial Suite, you can create multiple financial datasets.

A dataset is a complete financial database with its own chart of accounts. If you have two datasets, you have two separate databases with their own chart of accounts. Each dataset can have more than one fund, but you cannot transfer information between datasets. Each dataset can also have its own address, e-mail, phone, and State and Federal tax IDs associated with it.

When should I create a separate dataset?

You should use multiple datasets when you have two independent or semi-independent entities at the same location. For example, if a church has a school, you may choose to create one financial dataset for the church, and one financial dataset for the school. Each dataset has its own chart of accounts, payroll roster, vendor list, and assets.

You should create a separate dataset if:

- You have two or more financial books that operate on different fiscal calendars.
- You have separate federal ID numbers.
- You have separate accounting staffs.
- You have a need to keep financial information for different areas (e.g., church, school, day care) completely separate.

You can also archive datasets. Archiving datasets saves older transaction and vendor detail in the archive for historical purposes before summarizing transactions.

> ⚠ **Funds vs. Datasets**
>
> Funds and datasets are different. A fund is a set of financial books. If you have two funds, you have two sets of books in the same chart of accounts.
>
> Funds are not the same as departments, committees and areas and are treated differently when closing the year.

˅ To add a dataset

1. In ACS Financial Suite, under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop down list, select **Select Dataset**, then click **Go** ➡.
3. Click **Add**.
4. Enter the dataset's name and information, then click **OK**.

˅ To edit a dataset's information

1. In ACS Financial Suite, under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop down list, select **Select Dataset**, then click **Go** ➡.
3. If you want to edit an archived dataset, select the **Include Archived Datasets** option at the bottom of the Select Dataset dialog box.
4. Select the dataset that you want to edit, and click **Edit**.
5. Make the necessary changes and click **OK**.

˅ To delete a dataset

You can delete a Financial dataset that is no longer needed or was created in error. However, once you delete a dataset, you cannot retrieve it unless you restore a backup.

1. In ACS Financial Suite, under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop down list, select **Select Dataset**, then click **Go** .
3. To delete an archived dataset, select to **Include Archived Datasets** at the bottom of the **Select Dataset** dialog box.
4. Select the dataset that you want to delete and click **Delete**.
5. When the confirmation message displays, click **Yes**.

˅ To select a dataset

If you have more than one financial organization, such as a church and a day care center, you can switch between the datasets that you can access.

1. In ACS Financial Suite, under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop down list, select **Select Dataset**, then click **Go** .
3. To select an archived dataset, select **Include Archived Datasets** at the bottom of the **Select Dataset** dialog box.
4. Select the dataset that you want to make active, and click **OK**.

Archiving Financial Datasets

When you archive data, you make an exact copy of your financial dataset. This is helpful before you make major changes to your data. Examples of major changes include changing your general ledger period from a calendar year to a fiscal year and renumbering your chart of accounts.

As with your primary dataset, you can enter and retrieve information from archived datasets. If you make any changes in an archived dataset, those changes affect only the archived dataset. You can make a backup of an archived dataset.

You can archive financial data at any time of the year and as frequently as you want during the year.

To archive a dataset

1. In ACS Financial Suite, under **Manage Records**, click the **Period End Procedures** tab.

2. In the drop-down list, select **Archive Financial Data** and click **Go** .
3. Click **Yes**.
4. Enter a name for the archived dataset. For example: 2010 Church of Good Training History File. Click **OK**.
5. After the files are copied, a message displays. Click **OK**.
6. To access the archived dataset, click **Select Dataset** on the **Utilities** menu. Click **Include Archived Datasets,** then select the archived dataset.

Working with People Datasets

In ACS People Suite, you can create multiple people datasets.

When you create a new database, each module in this new dataset is completely blank initially. However, your user names from the original dataset are the same. You may want to create a second dataset if you have a set of individuals that you want to keep track of separately, for example, a mission church.

> ⚠️ **Note**
>
> If you don't want all ACS users in your organization to have access to a dataset, delete the users from the dataset, and they cannot log in. Instead, a message displays saying the username is invalid. You can also remove the **Change People Dataset** icon from those users' workstations.
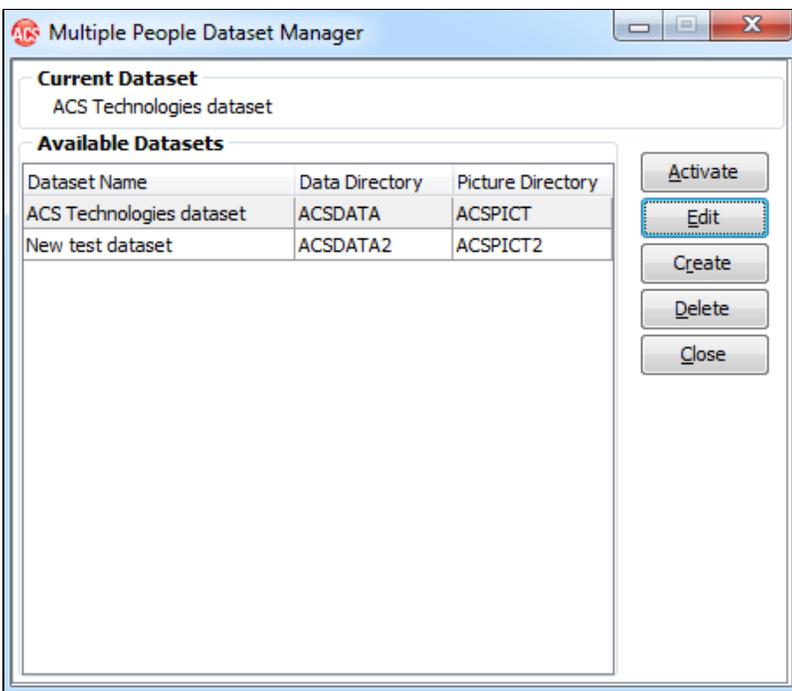
˅ To add a people dataset

1. Open **Change Active People Dataset**

   a.) ***Windows 7 and Windows Vista:*** On your Windows desktop, click the Start button 🔵 in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **Change Active People Dataset**.

   b.) ***Windows 8.1:*** On the Windows desktop, click the Start button ⊞ in the lower-left corner of the screen. The Start screen displays. Click the arrow button ⊕. The Apps view displays. In the ACS Technologies section, click **Change Active People Dataset**.

2. In the Multiple People Dataset Manager, click **Create**.
3. Enter the **Dataset Description**.
4. **Optional:** Enter the company address and contact information.
5. Click **OK**. The new dataset is created.

6. Select the new dataset, then click **Activate** to begin working in this dataset.

ˇ To change the active dataset

1. Open **Change Active People Dataset**

a.) **_Windows 7 and Windows Vista:_** On your Windows desktop, click the Start button in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **Change Active People Dataset**.

b.) **_Windows 8.1:_** On the Windows desktop, click the Start button in the lower-left corner of the screen. The Start screen displays. Click the arrow button . The Apps view displays. In the ACS Technologies section, click **Change Active People Dataset**.

2. In the Multiple People Dataset Manager, select the dataset you want to work with, then click **Activate**.

Financial Suite Maintenance Utilities

The Financial Suite Maintenance Utilities let you perform many tasks such as refreshing account types, resetting locks, and editing encumbered accounts. You can read more about each utility below.

˅ To Access Financial Suite Maintenance Utilities

1. Under Advanced Tools, click on the **Admin Utilities** tab.
2. In the drop-down list, select **Maintenance Utilities**, then click **Go** .
3. Click on the utility you want to use.

ACS Financial Suite - Maintenance Menu

Refresh Account Types

This utility refreshes General Ledger Account Types after you move accounts from headings.

For example, a liability account may be moved to a restricted heading. After moving accounts in the Chart of Accounts, some totals on reports may not display correctly. This utility corrects this. If you receive an error message about account IDs, you may want to run this utility.

Reset Check Lock
Use this utility when the following message displays "<Username> is already printing checks." This utility resets ACS so that you can print checks. You may need to use this after a power surge or because a workstation is inadvertently turned off during the check printing process.

You may also need to reset this lock when performing year-end procedures. If the message "Unable to unlock year-end General Ledger tables displays", reset the posting and check locks.

Reset Posting Lock
When a user is posting to the General Ledger, ACS creates a posting lock file that prevents another user from posting at the same time. After the first user is finished posting, ACS deletes the lock file and the second user can post.

If the posting lock file is not deleted, the message "Another user is trying to post" displays when the second user tries to post. The utility resets the posting lock file so that the second user can post to the general ledger.

You may also need to reset this lock when performing year-end procedures. If the message "Unable to unlock year-end General Ledger tables displays", reset the posting and check locks.

Edit Encumbered Amounts
You can edit the encumbered amounts that are accumulated when purchase orders are posted. Use this utility if the encumbered amounts are incorrect on the Analysis of Revenue and Expense report.

Workers Comp Adjustments
This utility lets you enter mid-year startup totals for workers' compensation and workers' compensation tax. You can also correct employees' worker's compensation totals. To verify the totals entered when adjusting, print the Workers' Compensation Report.

Payroll Tax Calculator
The payroll tax calculator calculates an employee's pay based on the information entered for the employee in Add/Edit Employees. With this utility, you can add wages, adjustments, and taxes or estimate an employee's check after editing an employee's wages, adjustments, or taxes.

Global Name List
The ACS Global Name List is a database of all the name records you add in ACS. The global name list displays a record for each individual in ACS with a list of the individual's different record types. The global record for each individual contains the individual's information, such as name, address, phone number, and e-mail address.

When you add multiple record types for an individual, the common information is shared for each type, and you can add as many record types for an individual as necessary. A name record consists of any employee, vendor, customer, contact, buyer, or bank record.

AR Account Corrections
The Account Correction utility lets you find and correct problems with customer balances. The utility scans all invoices and payments on a customer's account and verifies that all associated transactions are present. If not, the utility guides you through correcting balances.

People Suite Maintenance Utilities

ACS People Suite has a variety of maintenance utilities to resolve various scenarios. Be sure to perform a manual backup before using these utilities.

˅ To Access People Maintenance Utilities

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Maintenance Utilities** and click **Go** .
3. Select the appropriate utility.

ACS People Suite - Maintenance Menu

Verify Sort Fields
This utility regenerates sort fields. Sort fields are ACS fields assigned to each individual. The sort field is a code that represents the head of household's name, the individual's family position, whether or not the name should be indented in the Find Person option, and whether or not the individual has the same last name as the head of household.

Run this utility if someone is not listed alphabetically or indented properly in Find Person, or if names are not grounded properly in a report such as the Church Directory or Master People Listing.

Verify Label Names
This utility regenerates label names for all individuals who have not retained selected information on the Labels tab in the People module. Run this utility if there are issues with labels or names in the Contributions module. You should also run this utility after running the Verify Sort Fields utility.

Verify Individual ID
This utility verifies that each person's individual ID is valid. Run this utility for issues with reports. ACS Technologies recommends that you run this utility in addition to the other three maintenance utilities.

Verify Individual Number
This utility verifies that each person's individual number matches the correct family position. Run this utility for issues with reports. ACS Technologies recommends that you run this utility in addition to the other three maintenance utilities.

Clear Contribution Locks
This utility clears any transactions, pledges, or batches that have not been cleared. You cannot access a record unless it is cleared. Run this utility if your computer shuts down unexpectedly or you get an error and the record you worked on did not clear.

Void Negative Transactions
This utility will void any contributions that were entered as negative transactions. You can search for transactions with any date range, select the transactions, and void them. This way, these transactions will not show on any of your contributions statements that are sent to contributors.

Manage Duplicate E-mails
This utility displays a list of all duplicate email addresses in your People database. You can edit or delete duplicate email addresses from this utility.

Verify Search Tree
This utility verifies the parent-child relationship of an organization and populates the proper table with the hierarchy information. Run this utility if you experience issues with searches, adding new Organizations records, or editing the parent ID.

Removing Duplicate E-Mail Addresses from Records that Sync with The City

It's not uncommon to store a single email address for all records in a household in People especially children in the household who didn't have their own email address. However, The City requires a unique email address for each individual. So, if you plan to sync your ACS data with The City, you should find and remove the duplicate email addresses before syncing your ACS data with The City. This will help ensure that the correct records are synced between ACS and The City. Because we also know that email communication from ACS People is still necessary, we recommend that a different valid email address is entered on both parents' records in ACS People.

To remove duplicate email addresses from records that sync with The City

1. Under **Advanced Tools**, click the **Admin Utilities** tab.

2. In the drop-down list, select **Maintenance Utilities**, and click **Go** . The Maintenance Menu window displays.

3. Click **Manage Duplicate E-mails**. The Manage Duplicate E-mails grid displays.

4. In the Manage Duplicate E-mails grid, right-click, and click **Customize** to add any of several new columns to the grid:
   - City ID – This column displays each record's City ID. This field will be blank when the record is not synced.
   - City Status – This column displays each online City record. This field will be blank when the record is not synced.
   - Member Status – This column displays the member status assigned to each individual.

5. You can edit or delete individual email addresses by right-clicking on an email address and selecting an option from the pop-up box:
   - **Keep e-mail only for this record** - Select the record that has the email address you want to keep then choose this option and the email addresses will be removed from all other family records
   - **Edit E-mail** - When this option is selected the Add/Edit Email screen displays so you can make changes to the existing email. This is helpful when you need to select a different Preferred email or change the existing email address to a new email address.
   - **Delete E-mail** - This option is helpful when there are only two records that have the same email address and you need to remove the email address from one of the records.
   - **View/Edit Individual** - Opens People View/Edit Individual screen so the user can view profile and personal data.
   - **Print Selected, Print Grid and Export to Excel** - These options are helpful when the user wants to look through the list of names and email addresses and possibly gather new email addresses before removing the duplicates.
   - **People Merge** - Opens People Merge Records function without having to close out of Manage Duplicate Emails.
   - **Delete Individual** - Opens Delete Individual screen.

6. If there are records in the grid that already sync with The City, the **Mass Delete Duplicated City E-mails** button will display in the lower-right corner of the window. Click the button to remove those email addresses all at once.

OnDemand User Utility

The OnDemand User Utility allows administrators to add and delete users, and set up the proper security for each user.

To open the OnDemand user utility

1. Open OnDemand.
2. In the ACS Technologies OnDemand window, double-click **User Maintenance**.

Support Utility Manager

Support Utilities are used in conjunction with ACS Support Services and require a password to access. The password changes on a daily basis.

If you need to use these utilities, contact ACS Support Services at 1-800-669-2509, and a support analyst will assist you with the operation of these utilities.

Setting Up the ACS Backup Utility

A backup is an exact copy of your data files that you can restore in the event of a disaster. Backing up your data files is one of the most important computer-related tasks you should perform each day.

From virus attacks to inclement weather, you can lose data in a virtually unlimited number of ways, but adopting the practice of creating and storing ACS backup files provides you and your organization with the means to safeguard and protect valuable data.

It's your responsibility to protect your data by creating and storing backups, just as it is your responsibility to make sure that you maintain virus protection. Depending upon the circumstances leading to loss of data, the loss may amount to one record or all records. How often you back up your data ultimately depends upon how much data you have and the value of this data to you and your organization.

In addition to your regularly scheduled backups, you should also back up your data before special events like Year-End Closing or Attendance Promotion. In case of a mistake or a computer failure during the procedure, you can quickly restore your data and perform the procedures again, saving valuable time.

Installing the ACS Backup Service

The ACS Backup Service program utility is installed on your computer with the ACS Upgrade executable that you download from the ACS Web site or the ACS Install CD. After you install the ACS software, you must run the utility to configure the ACS Backup Service program.

Scheduling backups lets you establish and maintain a schedule for making regular backups of your ACS data and system files. Once you have set a backup routine, you can modify your routine of making backups to suit your needs or restore any previous ACS data or system files in the case of a disaster. To access the **Schedule Backup** option in the ACS Backup/Restore program, you must have user rights in ACS Utilities.

˅ To install the ACS Backup Service Program

1. Open the **Windows File Explorer**.

    a.) _**Windows 7 and Windows Vista:**_ On your Windows desktop, right-click the Start button 🌐 in the lower-left corner of the screen. A Windows context menu displays. Click **Open Windows Explorer**. The Windows Explorer window displays.

    b.) _**Windows 8.1:**_ On the Windows desktop, right-click the Start button ⊞ in the lower-left corner of the screen. A Windows context menu displays. Click **File Explorer**. The This PC window displays.

2. Double-click the C: drive.
3. Open the **ACSNET** or **WINACS** directory.
4. Double-click **Backup_Service_Install.exe**.
5. Click **OK**.
6. Configure the ACS Backup Service.

˅ To uninstall the ACS Backup Service Program

1. Open the **Windows File Explorer**.

    a.) _**Windows 7 and Windows Vista:**_ On your Windows desktop, right-click the Start button 🌐 in the lower-left corner of the screen. A Windows context menu displays. Click **Open Windows Explorer**. The Windows Explorer window displays.

    b.) _**Windows 8.1:**_ On the Windows desktop, right-click the Start button ⊞ in the lower-left corner of the screen. A Windows context menu displays. Click **File Explorer**. The This PC window displays.

2. Double-click the C: drive.
3. Open the **ACSNET** or **WINACS** directory.
4. Double-click **Backup_Service_Uninstall.exe**.
5. Click **OK**.
6. Configure the ACS Backup Service.

Configuring the ACS Backup Service

After you install the backup service utility, you can set up the service to run on your computer. To configure the ACS Backup Service, you must have administrative rights, and if you're on a network, you should set up the ACS Backup Service on your server.

In comparison with LiveStor, ACS Backup/Restore allows you to conveniently set a schedule to automatically create backups of all your ACS data. However, you'll need to configure the program according to the following guidelines and considerations:

- Set ACS Backup/Restore to activate when all other users are logged out of ACS. If other users are logged in to ACS when the scheduled backup job is activated, the data they're actively using is excluded from the backup file. For example, you could schedule backups in the early morning hours or late at night if you're sure that no one in your organization will be using ACS at those times. It's also a good idea to communicate the scheduled backup time to your staff to ensure that they're not logged into ACS.
- Designate one computer or workstation as a backup workstation, then set the scheduled backup jobs to run on it. If you're operating in a network environment, running the scheduled backup jobs on more than one computer or workstation is highly inefficient and unnecessary.
- While you can create a backup containing all of your active ACS data with the ACS Backup/Restore program, you should carefully consider your use of the Maximum Number of Stored Backups option, especially if the backup files are initially stored locally. Scheduled backup files are comparatively larger than those created manually, so file space can become an issue depending on the value you set for this option.

Once you set up the service, you can create a backup schedule.

˅ To configure the ACS Backup Schedule Service

1. Open the **Run** window.

   a.) ***Windows 7 and Windows Vista:*** On your Windows desktop, click the Start button 🔵 in the lower-left corner of the screen. The Start menu displays. In the search box, located at the bottom of the Start menu, type **run**. Click 🔲 **Run**. The Run window displays.

   b.) ***Windows 8.1:*** On the Windows desktop, right-click the Start button ⊞ in the lower-left corner of the screen. A Windows context menu displays. Click **Run**. The Run window displays.

2. In the Open field, type **services.msc**, and click **OK**. The Services window displays.
3. Under **Name**, double-click **ACS Service**.
4. Click the **Log On** tab.
5. Select **This Account**, and enter your administrative user name and password.
6. Confirm your password and, click **Apply**.
7. Click **OK** twice, and click **Restart the Service**.

Accessing the ACS Backup Utility

Here's how to access the ACS Backup Utility. If you created icons for your desktop during installation, you can also access the backup utility that way.

To access the ACS Backup utility

1. Open the **ACS Backup** utility.

   a.) **_Windows 7 and Windows Vista:_** On your Windows desktop, click the Start button in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **ACS Tools** > **ACS Backup**.

   b.) **_Windows 8.1:_** On the Windows desktop, click the Start button in the lower-left corner of the screen. The Start screen displays. Click the arrow button . The Apps view displays. In the ACS Technologies section, click **ACS Backup**.

2. In the Backup Login window, enter your ACS user name and password.
3. Click **OK**.

List of Resources

ACS Technologies offers the following online services to help meet your needs. Click **Online Resources** at the top of your ACS menu to access these options. You can also learn more about these services on the A CS Technologies web site

- **Save on Bulk Mailing** — Use ACS CASS It and ACS Max It to verify addresses, sort through postal regulations, and take full advantage of bulk mail discounts.
- **Access Your Data Online** — Use Access ACS and the Internet to allow your staff, leaders, and members to view or edit pieces of their ACS data.
- **Build Web Sites Faster** — Use Extend to enable your staff (technical and non-technical alike) to build professional-looking Web sites quickly and affordably.
- **Backup Files Online** — Use LiveStor to protect your valuable data files by automatically transferring them over the Internet and storing them safely on our secure servers.
- **Background Checks** — Learn about Safeguard, the ACS service that performs background checks on your employees and volunteers working with the youth and children in your care.
- **More ACS Products** — See the full array of ACS products by clicking the link to access our Web site.
- **Training** — Check out the wide array of options led by ACS Certified Trainers including on-site training, hands-on training classes, online training, and telephone training.
- **Forms and Supplies** — Our complete faith-based management solution includes providing forms, supplies, and ACS compatible products to our clients. All forms, supplies, and technology products are guaranteed to work with ACS Technologies software.
- **More Services** — Visit the ACS Technologies website to view all of the services ACS has available to faith based organizations.
- **Client Portal** — Join thousands of clients who manage ACS products, services, and support from this site.
- **Connect with Support** — Connect with a Support Analyst through your PC and receive remote assistance. This option does not display in OnDemand.
- **Check for Updates** — Get the latest revisions, updates, and patches for all ACS products. This option does not display in OnDemand.

Available Forms and Supplies

ACS Technologies offers a wide variety of preprinted forms to complement ACS software. Preprinted Contributions and Accounts Receivable documents can add a touch of professionalism to your statements. Payroll and Accounts Payable checks are available for laser printers, as well as Forms W-2 and 1099 guaranteed to work with ACS.

ACS Technologies offers peripheral hardware devices that work with the software. The ACS check reader eases the entry of contributions. ACS also works with Phone Tree. You can use Phone Tree to automatically deliver phone messages to a group of people.

To purchase forms and supplies, contact the ACS Forms and Supplies department at 1-800-669-2509. You can also visit our web site for more information.

> ⊘ **Tip**
>
> If your printer pulls from the bottom, make sure that you request checks that stack in reverse order.

Printing Help

Even though People Suite and Financial Suite are user-friendly, you may need help to do a particular task.

Help is available in several forms:

- **Context Sensitive Help** — Press F1 to display helpful information for the ACS window you have displayed.
- **Printed documentation** — You can print ACS documentation topics or for a group of topics. If you print a help topic in PDF format, you must have Adobe® Acrobat® Reader® installed on your computer.

The Help program provides a way to search for help and the contents are listed for easy retrieval. The navigation pane remains visible when viewing topics.

Since Help is context sensitive, you can press the **F1** key from anywhere in ACS and the program will provide Help for the area you are working in. For example, if you are reconciling a bank account and you press **F1**, information about bank reconciliation displays. If you are entering contact information and press **F 1**, information about Connections displays. If you are browsing Help and do not see a topic, go to that area in the software or to the main menu for that module and press **F1**. The appropriate Help files will display.

The ACS Help files are organized by suite. That means when you are working in the People Suite, you are viewing all of the Help for the modules you own within the People Suite. Searches in Help cover all modules within a suite, but not modules in a different suite. For example, if you are working in Contributions and search Help for information about Funds, the search results will contain all topics that contain the word fund in Contributions, but not those topics in General Ledger.

You can click on hyperlinks in a topic to move to another topic. Hyperlinks are used throughout ACS Help. This provides easy navigation between topics.

ACS Help Transition

As of May 2011, ACS is moving help from the ACS Help Center to the ACS wiki. During the transition, all topics are reviewed and updated to make sure the latest information is shared.

What does this mean for you? When you press **F1** to access context sensitive help, the view is seamless whether it is being pulled from Help Center file or the wiki. ACS automatically knows where to look, but during this transition there will be slight differences in how help looks and how you print help.
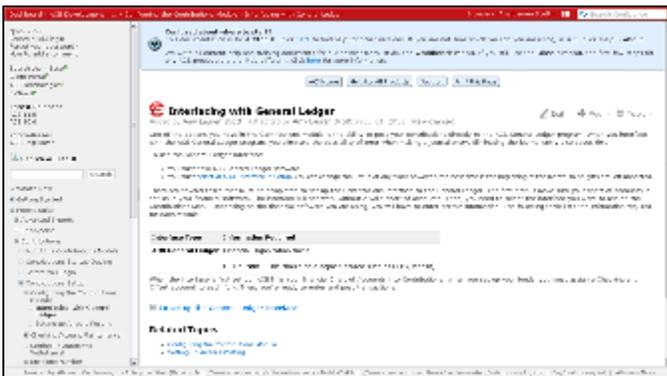
Here's an example of a help topic viewed from the Help Center:
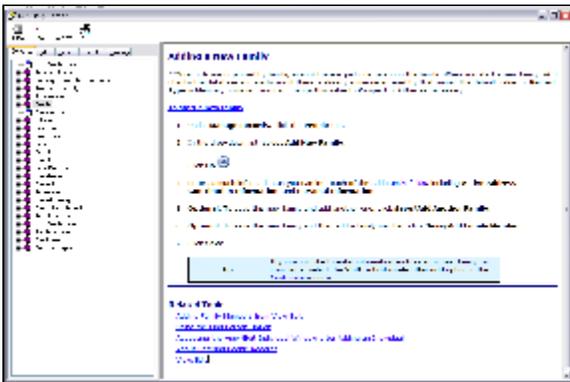
Help Center help:

- Displays help topics on the right.
- Has a tree on the left pane for navigating to other areas.
- Displays a print icon in the top left.
- Allows you to return to a previous topic.

Here's an example of a help topic on the wiki:

Wiki help:

- Displays help topics on the right.
- Has a tree on the left pane for navigating to other topics.
- Allows you to print the topic by going to Tools>Export to PDF
- Allows you to return to a previous topic.

Printing Help from Help

You can print a help topic to have a hard copy of it for your records.

˅ To print wiki help for a module in PDF format

1. Make sure you have accessed the correct version of ACS.
2. Under User Guides, select the guide you want to print.
3. Click the document name.
4. If necessary, review the document.
5. Click [printer icon] .
6. Select the appropriate printer settings, including whether to print all or parts of the document.
7. Click **OK**.
8. From the Tools drop-down, select **Export to PDF**.
9. Click **Open**.
10. Click [printer icon] .

Logging Into ACS

Use the following instructions to log into ACS.

After logging in the first time, you should create new user names and passwords.

> ⊘ **Shortcuts**
>
> If you created shortcut icons for your desktop during installation, you can access ACS People Suite, ACS Financial Suite, and ACS Backup by double-clicking their respective icons.

˅ To log into ACS People Suite

1. On your Windows desktop, click the **ACS People Suite** icon.
2. In the ACS Login window, enter your ACS user name and password. To access ACS for the first time, use a default ACS user name and password.
3. Click **OK**.

˅ To log into ACS Financial Suite

1. On your Windows desktop, click the **ACS Financial Suite** icon.
2. In the ACS Login window, enter your ACS user name and password. To access ACS for the first time, use a default ACS user name and password.
3. Click **OK**.

Reinstalling ACS

You may need to reinstall ACS if your initial installation was improper, you replaced your hard drive or computer, you accidentally deleted some programs or modules, or your files are corrupt.

Generally, reinstalling ACS involves backing up your data, uninstalling ACS, downloading the latest version of ACS software, then restoring your backup.

Reinstalling the Network Version of ACS

Reinstalling the network PC version of ACS involves backing up your ACS data, uninstalling ACS, downloading the latest version of ACS, restoring data, and setting up individual workstations.

> ⚠ **Note**
>
> When installing ACS on a Windows 8® operating system, make sure that the **Desktop Icons** option is selected.

⌄ To back up your ACS data

1. Open the **ACS Backup** utility.

   a.) ***Windows 7 and Windows Vista:*** On your Windows desktop, click the Start button 🔵 in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **ACS Tools** > **ACS Backup**.

   b.) ***Windows 8.1:*** On the Windows desktop, click the Start button ⊞ in the lower-left corner of the screen. The Start screen displays. Click the arrow button ⊕. The Apps view displays. In the ACS Technologies section, click **ACS Backup**.

2. Enter your user name and password, and click **OK**.
3. Under **Data Options**, select the backup that you want to perform.
4. Under **Additional Options**, make the appropriate selections.
5. Verify the backup destination. If necessary, click **Lookup** ⊡ to select a different location.

   > ⚠ **Note**
   >
   > For security reasons, you cannot back up to the WINACS or ACSNET folders.
   >
   > ACS OnDemand users must back up files to the **S:\ACS_Backups** folder.

6. If you are backing up to a zip disk or a flash drive, insert the disk or drive.
7. Click **Backup**.
8. If you selected to change the filename, enter a filename and click **OK**.
9. **Optional:** When the backup is finished, click **Print History** to view or print the Backup/Restore Log report.

⌄ To uninstall an ACS workstation

1. Open **Uninstall ACS Workstation**.

   a.) ***Windows 7 and Windows Vista:*** On your Windows desktop, click the Start button 🔵 in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **Uninstall ACS Workstation**.

   b.) ***Windows 8.1:*** On the Windows desktop, click the Start button ⊞ in the lower-left corner of the screen. The Start screen displays. Click the arrow button ⊕. The Apps view displays. In the ACS Technologies section, click **Uninstall ACS Workstation**.

2. Enter the password that displays exactly as it appears, and click **Uninstall**.
3. Follow the instructions as they display.
4. After the uninstall is complete, restart your computer.

To download the latest version of ACS

1. Visit the **Downloads page of the ACS Client Portal** to download ACS, and sign in with your **Email**, **Site Number**, and **PIN**. Contact ACS Support at 1-800-669-2509 if you need this information.
2. Select the current version of ACS. Click **Download**, and save the file to your computer.
3. Double-click the .exe file you saved and click **Run**.
4. Follow the instructions on your screen.

To restore a backup

1. Open the **ACS Backup** utility.

   a.) _**Windows 7 and Windows Vista:**_ On your Windows desktop, click the Start button in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **ACS Tools** > **ACS Backup**.

   b.) _**Windows 8.1:**_ On the Windows desktop, click the Start button in the lower-left corner of the screen. The Start screen displays. Click the arrow button . The Apps view displays. In the ACS Technologies section, click **ACS Backup**.

2. Enter your user name and password, and click **OK**.
3. Click **Restore**.
4. Select the backup file that you want to restore, and click **Open**.
5. Select the datasets that you want to restore, and click **OK**.

To set up individual workstations

1. Open the **Run** window.

   a.) _**Windows 7 and Windows Vista:**_ On your Windows desktop, click the Start button in the lower-left corner of the screen. The Start menu displays. In the search box, located at the bottom of the Start menu, type **run**. Click **Run**. The Run window displays.

   b.) _**Windows 8.1:**_ On the Windows desktop, right-click the Start button in the lower-left corner of the screen. A Windows context menu displays. Click **Run**. The Run window displays.

2. In the Open field, type **X:\acsnet\install.exe** and click **OK**. Substitute your mapped drive letter for X. Also, you should substitute the location of install.exe according to its path. For example, it could be located in **N:\programs\acsnet\install.exe**.
3. Follow the instructions as they display.
4. Repeat Steps 1 - 3 on each computer you want to set up as an individual workstation.

Reinstalling the Single PC Version of ACS

Reinstalling the single PC version of ACS involves backing up your data, uninstalling ACS, downloading and installing the latest version of ACS, and restoring your backup.

> ⚠️ **Note**
>
> When installing ACS on a Windows 8® operating system, make sure that the **Desktop Icons** option is selected.

˅ To back up your ACS data

1. Open the **ACS Backup** utility.

   a.) _**Windows 7 and Windows Vista:**_ On your Windows desktop, click the Start button 🔵 in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **ACS Tools** > **ACS Backup**.

   b.) _**Windows 8.1:**_ On the Windows desktop, click the Start button ⊞ in the lower-left corner of the screen. The Start screen displays. Click the arrow button ⊕. The Apps view displays. In the ACS Technologies section, click **ACS Backup**.

2. Enter your user name and password, and click **OK**.
3. Under **Data Options**, select the backup that you want to perform.
4. Under **Additional Options**, make the appropriate selections.
5. Verify the backup destination. If necessary, click **Lookup** 🔲 to select a different location. For security reasons, you cannot back up to the WINACS or ACSNET folders.
6. If you are backing up to a zip disk or a flash drive, insert the disk or drive.
7. Click **Backup**.
8. If you selected to change the filename, enter a filename and click **OK**.
9. **Optional:** When the backup is finished, click **Print History** to view or print the Backup/Restore Log report.

˅ To uninstall an ACS workstation

1. Open **Uninstall ACS Workstation**.

   a.) _**Windows 7 and Windows Vista:**_ On your Windows desktop, click the Start button 🔵 in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **Uninstall ACS Workstation**.

   b.) _**Windows 8.1:**_ On the Windows desktop, click the Start button ⊞ in the lower-left corner of the screen. The Start screen displays. Click the arrow button ⊕. The Apps view displays. In the ACS Technologies section, click **Uninstall ACS Workstation**.

2. Enter the password that displays exactly as it appears, and click **Uninstall**.
3. Follow the instructions as they display.
4. After the uninstall is complete, restart your computer.

˅ To download the latest version of ACS

1. Visit the **Downloads page of the ACS Client Portal** to download ACS, and sign in with your **Email**, **Site Number**, and **PIN**. Contact ACS Support at 1-800-669-2509 if you need this information.
2. Select the current version of ACS. Click **Download**, and save the file to your computer.

3. Double-click the .exe file you saved and click **Run**.
4. Follow the instructions on your screen.

To restore a backup

1. Open the **ACS Backup** utility.

   a.) ***Windows 7 and Windows Vista:*** On your Windows desktop, click the Start button ⬤ in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **ACS Tools** > **ACS Backup**.

   b.) ***Windows 8.1:*** On the Windows desktop, click the Start button ⊞ in the lower-left corner of the screen. The Start screen displays. Click the arrow button ⊕. The Apps view displays. In the ACS Technologies section, click **ACS Backup**.

2. Enter your user name and password, and click **OK**.
3. Click **Restore**.
4. Select the backup file that you want to restore, and click **Open**.
5. Select the datasets that you want to restore, and click **OK**.

Reinstalling the Terminal Server Version of ACS

Reinstalling the terminal server version of ACS consists of backing up your data, uninstalling ACS, installing ACS, then restoring your data.

> ⚠ **Note**
>
> When installing ACS on a Windows 8® operating system, make sure that the **Desktop Icons** option is selected.

˅ To back up your ACS data

1. Close all other ACS programs. If any other user is currently logged in to ACS, data files may not back up properly.
2. Open the **ACS Backup** utility.

   a.) **_Windows 7 and Windows Vista:_** On your Windows desktop, click the Start button 🌐 in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **ACS Tools** > **ACS Backup**.

   b.) **_Windows 8.1:_** On the Windows desktop, click the Start button ⊞ in the lower-left corner of the screen. The Start screen displays. Click the arrow button ⊕. The Apps view displays. In the ACS Technologies section, click **ACS Backup**.

3. Enter your user name and password and click **OK**.
4. Under **Data Options**, select the backup that you want to perform.
5. Under **Additional Options**, make the appropriate selections.
6. Verify the backup destination. If necessary, click **Lookup** ⬚ to select a different location. For security reasons, you cannot back up to the WINACS or ACSNET folders, and ACS OnDemand users must back up files to the **S:\ACS_Backups** folder.
7. If you are backing up to a zip disk or a flash drive, insert the disk or drive.
8. Click **Backup**.
9. If you selected to change the filename, enter a filename and click **OK**.
10. **Optional:** When the backup is finished, click **Print History** to view or print the Backup/Restore Log report.

˅ To uninstall an ACS workstation

1. Open **Uninstall ACS Workstation**.

   a.) **_Windows 7 and Windows Vista:_** On your Windows desktop, click the Start button 🌐 in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **Uninstall ACS Workstation**.

   b.) **_Windows 8.1:_** On the Windows desktop, click the Start button ⊞ in the lower-left corner of the screen. The Start screen displays. Click the arrow button ⊕. The Apps view displays. In the ACS Technologies section, click **Uninstall ACS Workstation**.

2. Enter the password that displays exactly as it appears, and click **Uninstall**.
3. Follow the instructions as they display.
4. After the uninstall is complete, restart your computer.

˅ To install the terminal server version of ACS

1. Visit the **Downloads page of the ACS Client Portal** to download ACS, and sign in with your **Em**

ail, **Site Number**, and **PIN**. Contact ACS Support at 1-800-669-2509 if you need this information.

2. Select the current version of ACS. Click **Download**, and save the file to your computer.
3. Double-click the .exe file you saved and click **Run**.
4. Follow the instructions on your screen.

˅ To restore a backup

1. Open the **ACS Backup** utility.

   a.) ***Windows 7 and Windows Vista:*** On your Windows desktop, click the Start button 🌐 in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **ACS Tools** > **ACS Backup**.

   b.) ***Windows 8.1:*** On the Windows desktop, click the Start button ⊞ in the lower-left corner of the screen. The Start screen displays. Click the arrow button ⊕. The Apps view displays. In the ACS Technologies section, click **ACS Backup**.

2. Enter your user name and password and click **OK**.
3. Click **Restore**.
4. Select the backup file that you want to restore and click **Open**.
5. Select the datasets that you want to restore and click **OK**.

Verifying your ACS version

To find out which ACS version you're using

1. Open and log in to ACS People or Financial Suite.
2. On the toolbar, click **Help** > **About**.

Your version number is displayed below the product trademark. See the image below.

? Unknown Attachment

Finding ACS and Windows Tools, Utilities, and Files in Windows

Each of our customers typically run their ACS software on one of several Windows versions. But, the instructions for accessing various ACS tools and utilities are different for each Windows version.

For example, a Windows 7 user who needs to open the ACS Utility Manager will need different instructions than a Windows 8.1 user.

We're here to help you by providing instructions specific to your Windows version:

- Help Me Open CASS It
- Help Me Open the ACS Backup
- Help Me Open the ACS People Import
- Help Me Open the Run Window
- Help Me Open the Utility Manager
- Help Me Open the Windows Device Manager
- Help Me Open the Windows File Explorer
- Help Me Run the Add New Modules File
- Help Me Search for normal.dot

Help Me Open CASS It

Windows 7 and Windows Vista: On your Windows desktop, click the Start button ⊕ in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **CASS It!**.

Windows 8.1: On the Windows desktop, click the Start button ⊞ in the lower-left corner of the screen. The Start screen displays. Click the arrow button ⊕. The Apps view displays. In the ACS Technologies section, click **CASS It!**.

Help Me Open the ACS Backup

Windows 7 and Windows Vista: On your Windows desktop, click the Start button in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **ACS Tools** > **ACS Backup**.

Windows 8.1: On the Windows desktop, click the Start button in the lower-left corner of the screen. The Start screen displays. Click the arrow button . The Apps view displays. In the ACS Technologies section, click **ACS Backup**.

Help Me Open the ACS People Import

Windows 7 and Windows Vista: On your Windows desktop, click the Start button in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **ACS Tools** > **ACS People Import**.

Windows 8.1: On the Windows desktop, click the Start button in the lower-left corner of the screen. The Start screen displays. Click the arrow button . The Apps view displays. In the ACS Technologies section, click **ACS People Import**.

Help Me Open the Run Window

Windows 7 and Windows Vista: On your Windows desktop, click the Start button in the lower-left corner of the screen. The Start menu displays. In the search box, located at the bottom of the Start menu, type **run**. Click **Run**. The Run window displays.

Windows 8.1: On the Windows desktop, click the Start button in the lower-left corner of the screen. The Start screen displays. Click the arrow button . The Apps view displays. In the Windows System section, click **Run**. The Run window displays.

Help Me Open the Utility Manager

Windows 7 and Windows Vista: On your Windows desktop, click the Start button ⊙ in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **ACS Tools** > **U tility Manager**.

Windows 8.1: On the Windows desktop, click the Start button ⊞ in the lower-left corner of the screen. The Start screen displays. Click the arrow button ⊕. The Apps view displays. In the ACS Technologies section, click **Utility Manager**.

Help Me Open the Windows Device Manager

Windows 7 and Windows Vista: On your Windows desktop, right-click the Start button in the lower-left corner of the screen. A Windows context menu displays. In the right-side pane of the context menu, click **Control Panel**. The Control Panel displays. Click **Hardware and Sound** > **Device Manager**.

Windows 8.1: On the Windows desktop, right-click the Start button in the lower-left corner of the screen. A Windows context menu displays. Click **Control Panel**. The Control Panel displays. Click **Device Manager**.

Help Me Open the Windows File Explorer

Windows 7 and Windows Vista: On your Windows desktop, right-click the Start button in the lower-left corner of the screen. A Windows context menu displays. Click **Open Windows Explorer**. The Windows Explorer window displays.

Windows 8.1: On the Windows desktop, right-click the Start button in the lower-left corner of the screen. A Windows context menu displays. Click **File Explorer**. The This PC window displays.

Help Me Run the Add New Modules File

Windows 7 and Windows Vista: On your Windows desktop, click the Start button in the lower-left corner of the screen. The Start menu displays. Click **All Programs** > **ACS Technologies** > **ACS Tools** > **Add New Modules**.

Windows 8.1: On the Windows desktop, click the Start button in the lower-left corner of the screen. The Start screen displays. Click the arrow button . The Apps view displays. In the ACS Technologies section, click **Add New Modules**.

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Help Me Search for normal.dot

Windows 7 and Windows Vista: On your Windows desktop, click the Start button in the lower-left corner of the screen. The Start menu displays. In the search box, located at the bottom of the Start menu, type **normal.dot**.

Windows 8.1: On the Windows desktop, click the Start button in the lower-left corner of the screen. The Start screen displays. Click the Search button . The Search box displays. Type **normal.dot**.