BUILDING FOR THE FUTURE

giving your employees the tools to develop and grow

DDI-Connect Jeopardy

2016 DDI User Group Conference

DDI

DDI Jeopardy

Tips & Tricks	FAQ	Problem Solving	General	Wildcard
1	12	13	8	10
11	6	2	9	15
16	17	18	14	3
21	5	7	19	20
4	22	23	24	25

1 – 500 pts

- How do I set a default start screen in DDI-Connect?

- Find the menu idea → right click → Set as Startup program
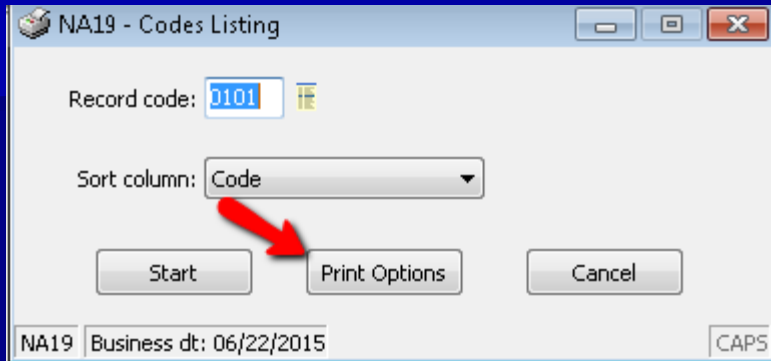
1 – 500 pts

1 – 200 pts

- How can you archive a report?

- Print Options → mark Archive
- After a report is ran mark Archive
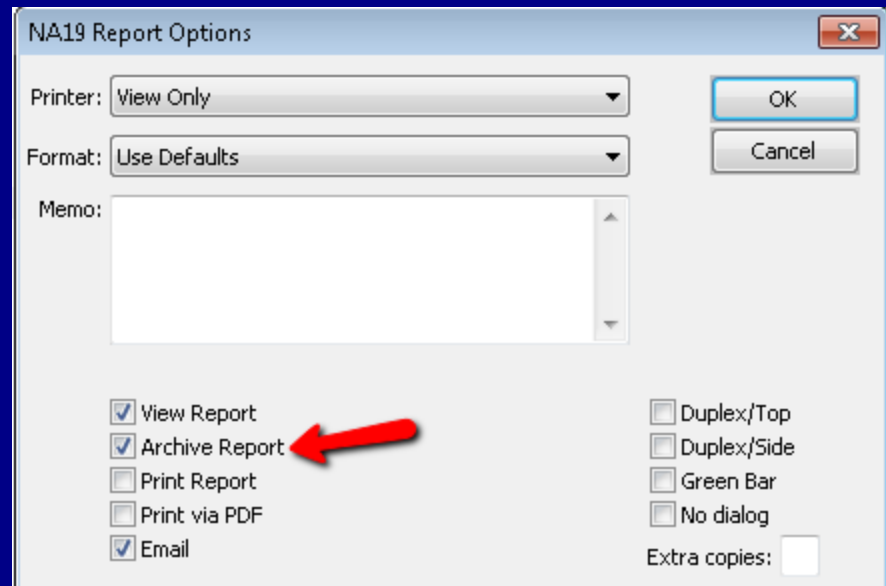- Select Archive in your job queue

1 – 200 pts

1 – 200 pts

1 – 200 pts

1 – 400 pts

- What is the easiest way to locate a program on the DDI-Connect Menu?

- Right click on the Menu → Select Find

1 – 400 pts
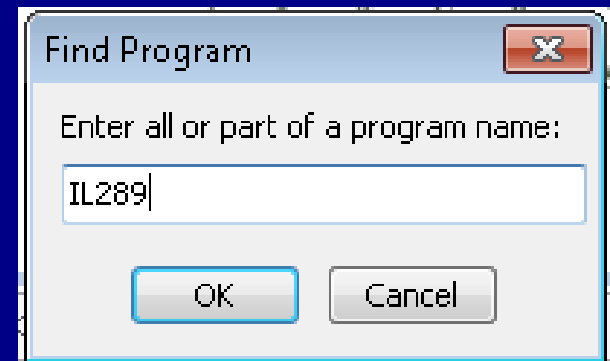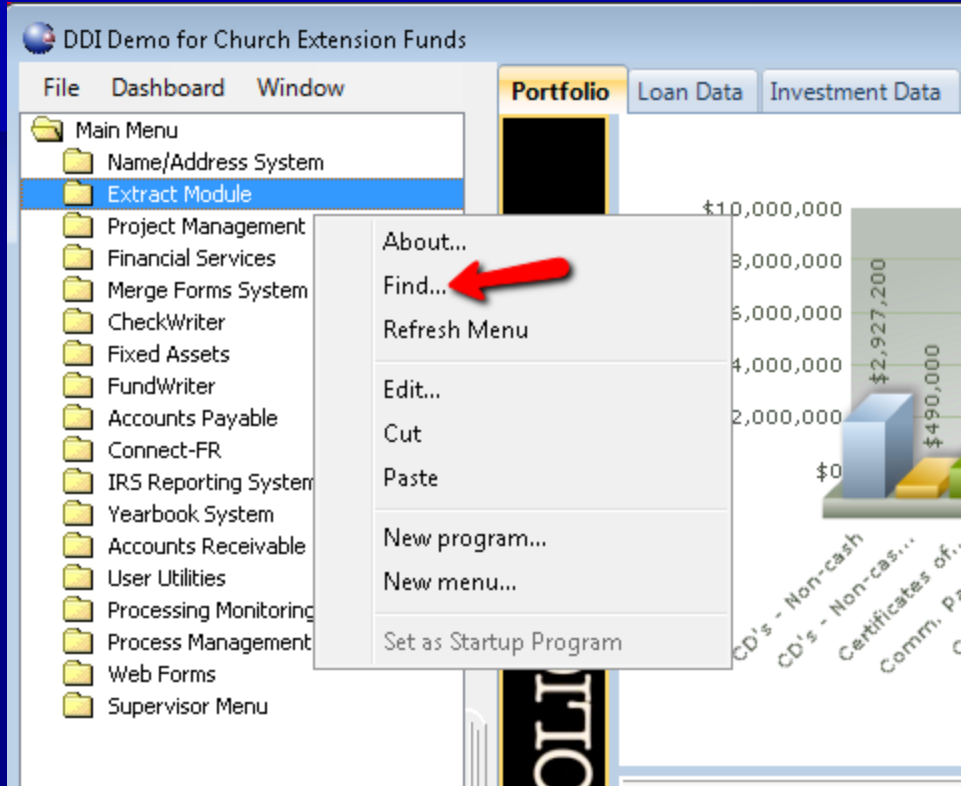
1 – 400 pts

1 – 300 pts

- What is the best way to reset your menu?

- Right click on menu → Refresh
- Double-click on Main Menu

1 – 300 pts
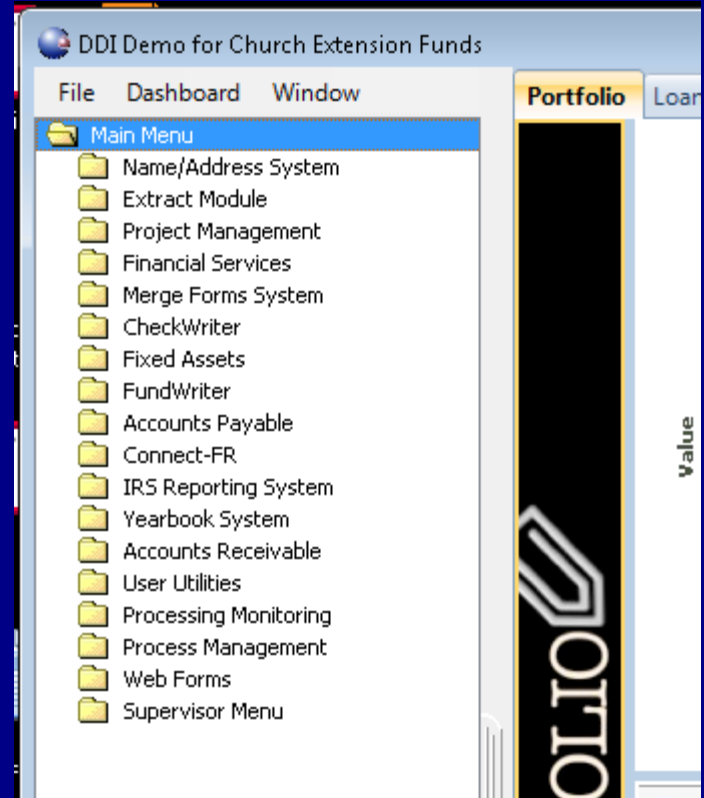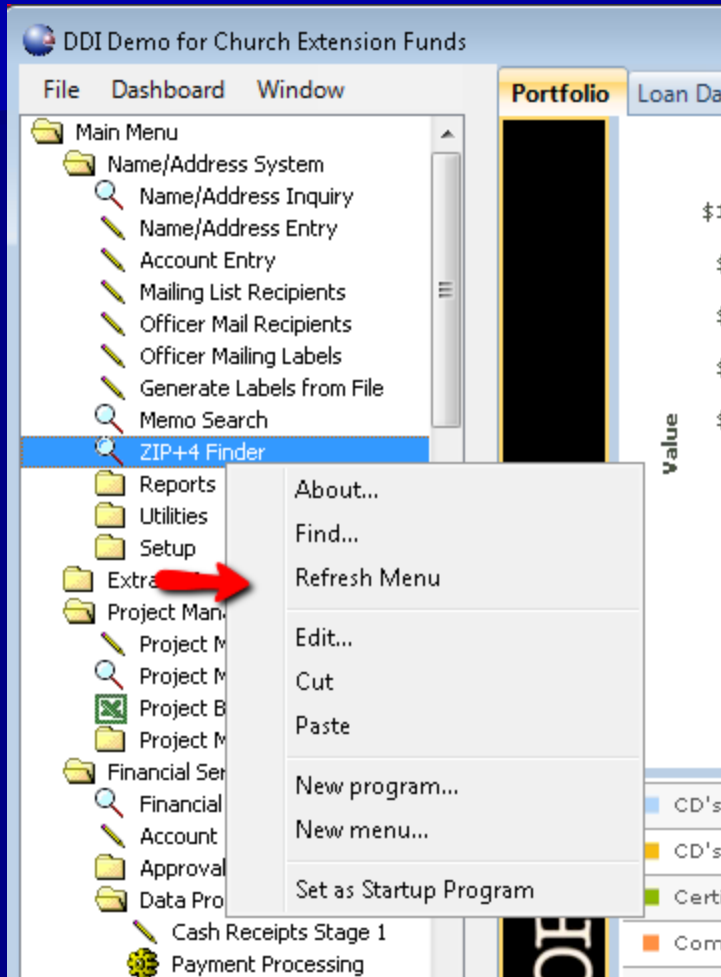
1 – 300 pts
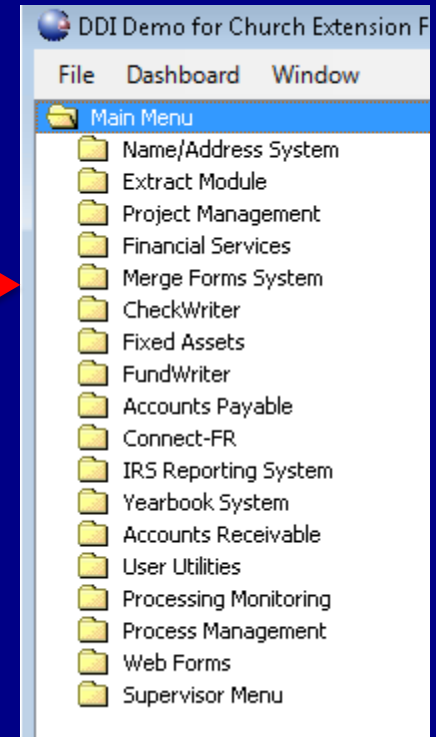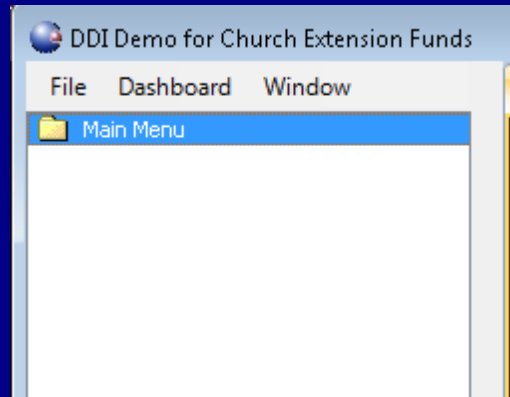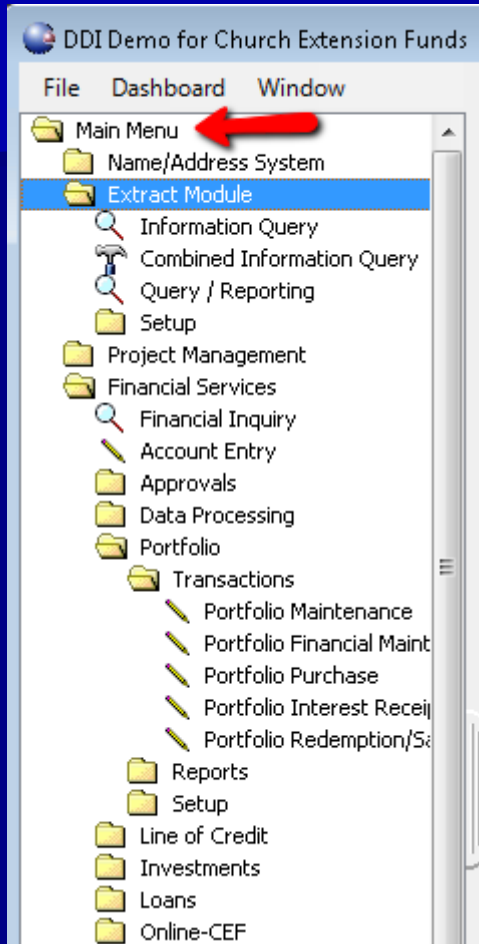
1 – 100 pts

- How can you output a display grid, like Name/address Inquiry grid, in a spreadsheet?

- Right Click on the grid header and select Display in spreadsheet.

1 – 100 pts

2 – 100 pts

- How can I save a file to my Desktop from Citrix?

- Local Disk (C:) → Users → your username → Desktop

2 – 100 pts
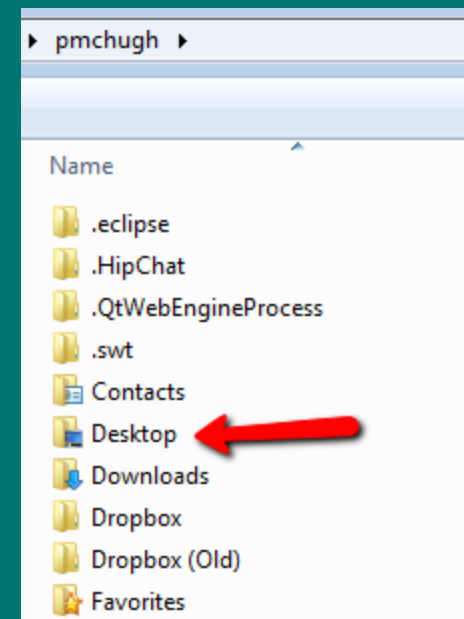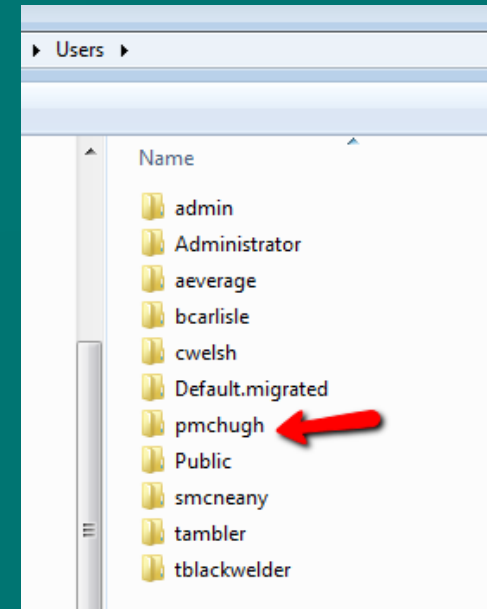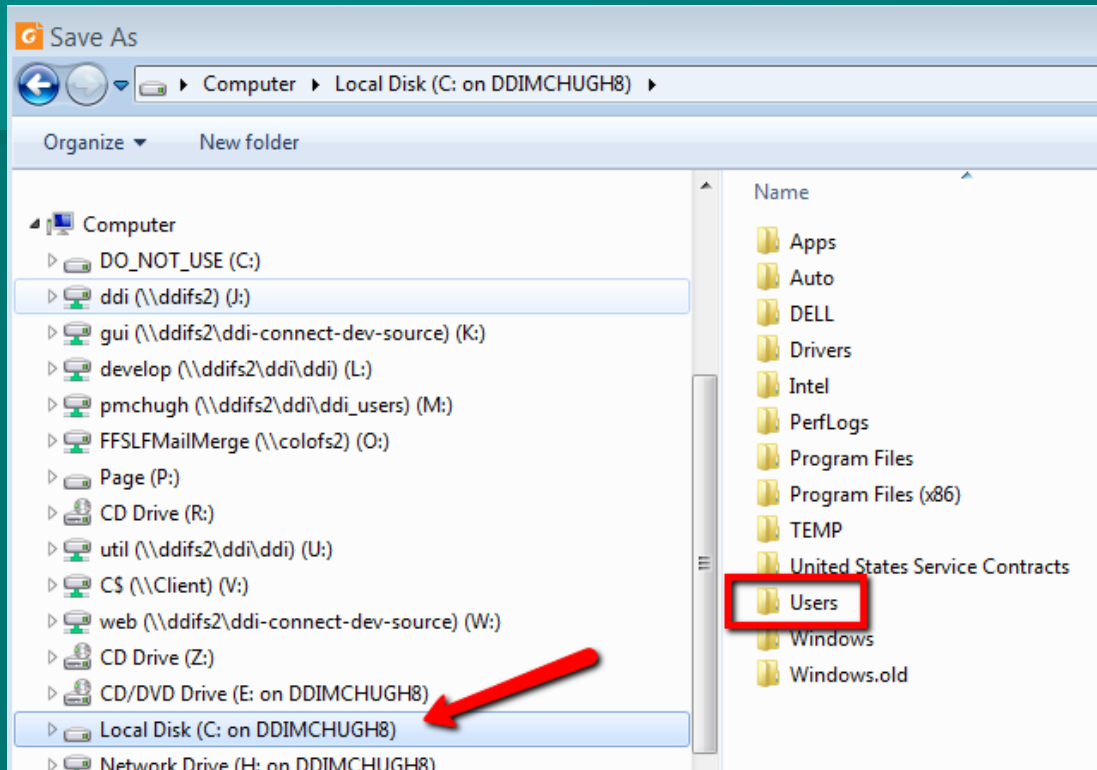
2 – 200 pts

- How do you open a system generated .csv file as an .xlsx?

- Open the File → Save As → Select "Save as" type of .xlsx

2 – 200 pts

2 – 400 pts

- What type of investment or loan financial adjustment require a corresponding journal entry?

- Financial Adjustments that effect the principal balance of an investment or loan

2 – 400 pts

2 – 300 pts

- What happens when a financial adjustment is done to effect the Prepaid/PastDue amount on a Loan?

- No general ledger entry occurs. An adjustment of the Prepaid/PastDue amount only effects the Payment History records the system creates.

2 – 300 pts

Loan Financial Adjustment

Loan #: 9571   Eff. date: 06/22/2015   Account: 000530806

Second Mormon Church
P O Box 6922
Sugar Land, TX 77479

General | Fees

Balance: 16,245.66	16,245.66	0.00
Prepaid(-)/Pastdue: -14,215.27	0.00	-14,215.27
Interest due: 0.00	0.00	0.00

Principal paid YTD: 21,868.34

Principal paid: 283,754.34

Interest paid YTD: 1,465.66

Interest paid: 525,177.60

Loan Payment History

View: ● Payments due   ○ Payments received

Payments Due

Loan	Due dt	Due Amount	Paid Amount	Type	Status
9571	06/22/2015	14,215.27	0.00	Adjustment	Outstanding
9571	06/01/2015	1,894.00	1,894.00	Regular	Acknowledged
9571	05/01/2015	1,894.00	1,894.00	Regular	Acknowledged
9571	04/01/2015	1,894.00	1,894.00	Regular	Acknowledged
9571	03/01/2015	1,894.00	1,894.00	Regular	Acknowledged
9571	02/01/2015	1,894.00	1,894.00	Regular	Acknowledged
9571	01/01/2015	1,894.00	1,894.00	Regular	Acknowledged
9571	12/01/2014	1,894.00	1,894.00	Regular	Acknowledged
9571	11/01/2014	1,894.00	1,894.00	Regular	Acknowledged
9571	10/01/2014	1,894.00	1,894.00	Regular	Acknowledged
9571	09/01/2014	1,894.00	1,894.00	Regular	Acknowledged
9571	08/01/2014	1,894.00	1,894.00	Regular	Acknowledged
9571	07/01/2014	1,894.00	1,894.00	Regular	Acknowledged

2 – 500 pts

- What the best tool in the system to get specific data you want from the Name/Address, Fundraising, Loans, Investments, GL, etc out to spreadsheet?

- Query / Reporting Tool

2 – 500 pts

3 – 300 pts

- What causes my Active Directory (DDI-Connect User Account) get locked out?

- Typed in your password incorrectly too many times
- Have a device with an old password saved and it is trying to connect. PC, laptops, cellphones, tablets all need to be updated.

Tip: Once locked out, you will automatically be unlocked in 30 minutes.

3 – 300 pts

3 – 300 pts
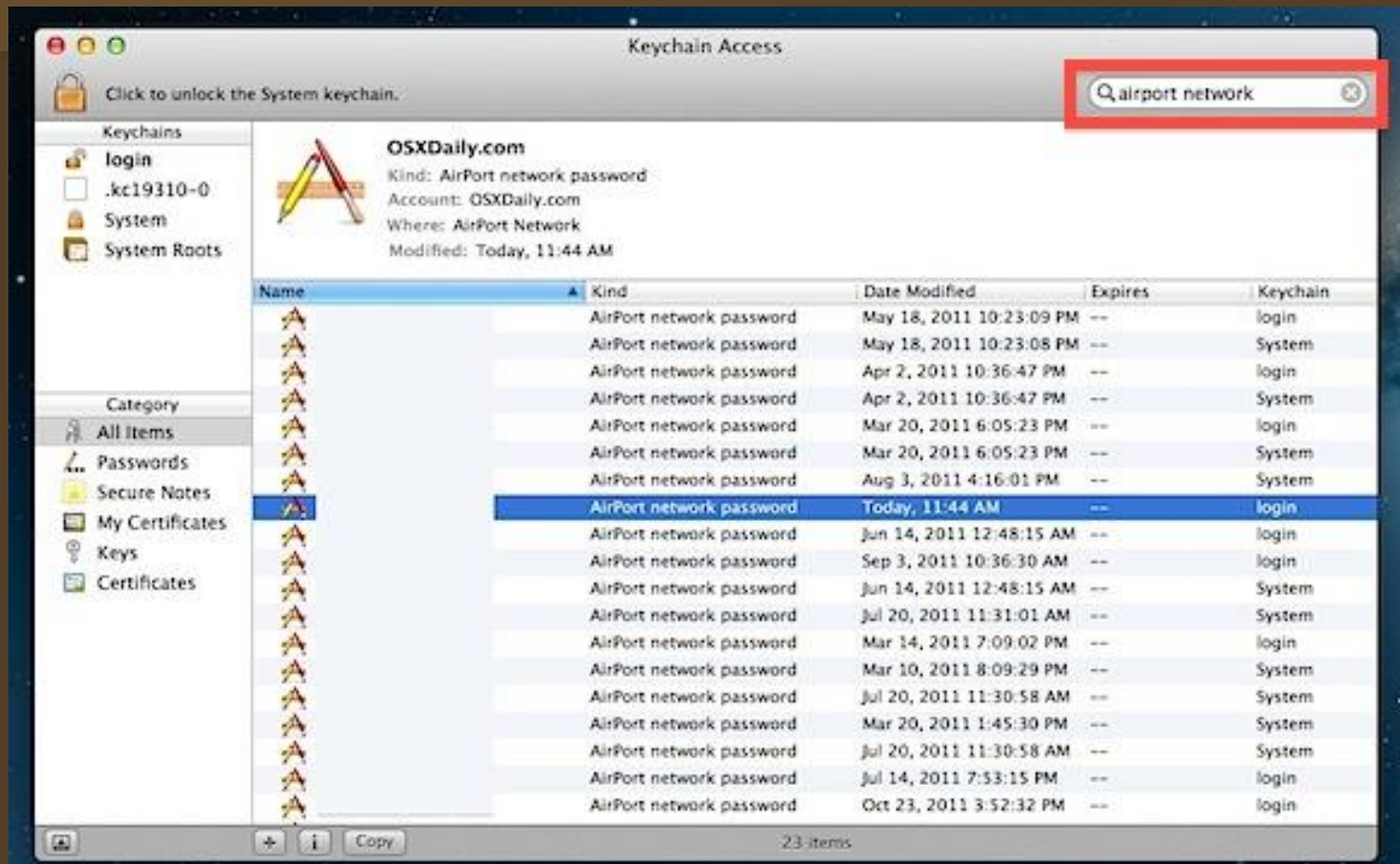
3 – 500 pts

- Type question to appear here

- Type answer to appear with a mouse-click here

3 – 200 pts

- Every month you have a long/similar journal entry to do, how can you do this entry without manually doing it from scratch? (4 possible answers)

- Import from a spreadsheet
- Copy from a journal template
- Copy from an existing journal
- Setup a recurring journal entry

3 - 100

- The system keeps changing "Rev." to "Pastor", what causes this?

- Prefix File Maintenance

3 - 100

- Name/Address System → Setup → Prefix File Maintenance

3 – 400 pts

- Problems normally occur when directions are not followed or checklists are not defined & managed. What program in DDI-Connect is designed to help with checklists and management of tasks?

- Process Management

4 – 400 pts

- If you have drilled into a lot of screens inside DDI-Connect, what is the easiest way to exit out of all of them at once without leaving DDI-Connect?

- Windows → Close All

4 – 400 pts

4 – 500 pts

- Social Media is here and it looks like it will be sticking around for awhile. How can setup the system so you can store social media sites for your constituents?

- To do this, go to Name/Address - Setup - Contact Info Type Setup. Click New, choose Category = Web, then Enter the name/description of the social media site your wanting to track.

4 – 500 pts

4 – 100 pts

- Is there a place to see all Memos associated to a PIN #?

- Yes! Go to that PIN record in the Name/Address System. Then click on the Memos Tab - View - 360 View. This will pull in memos from the other areas like Loans, Investments, Portfolio, & Accounts.

4 – 100 pts

4 – 300 pts

- How can you customize Relationship Types for your organization?

- Name/Address System - Setup - Codes Maintenance - 0012 Relationship Codes. From here you can add the different relationship types that your organization wants to track. Relationships like Church Treasury, Senior Pastor, Board Member, etc.

4 – 300 pts

Codes Maintenance
Relationship codes

Code	Description
ADDR	shared address records
AKA	Name Change
ALTP	Alternate interest payee
AM	Associate Minister
AREA	Area Office
ARGM	Associate Regional Minister
ARMN	Area Minister
AUNT	Aunt
BA	Business Administrator
BC	Board Chairperson
BCT	Building Committee
BDM	Board Member
BRO	Brother
BS	Board Secretary
CA	Correspondent
CBG	Chairperson - Building Committee
CCC	Chairperson Capital Campaign
CE	Chairperson - Elders
CEO	President
CHLD	Child (of guardian)
CHT	Church Trustee
CO	Church Officer (unknown position)
COUS	Cousin
CT	Chairperson - Trustee
CUST	Custodian for benefit of another
DAU	Daughter
DEA	Deacon
DEAC	Deaconess
DMND	Disciple Minister Serving Non Disciple

Code List Properties

Record code: **12**   **Relationship codes**

Code: ARMN   ☑ Active

Description: Area Minister

Security:

Numeric value 1: 0

Numeric value 2: 0

Recip. code (M):

Recip. code (F):

OK

Cancel

Warning: *As you are maintaining codes, you may find that you want to remove a relationship code you no longer use. It is important to NOT delete the code, instead deselect the Active flag on the code.*

4 – 200 pts

- DDI's CSS Team went to the "Escape Room" in March. Do you think we escaped the room?

- Nope. Only 5% escape this particular room.

4 – 200 pts

5 – 200 pts

- If you collect unique constituent data that DDI-Connect does not have a standard field for, where is the best place to store it?

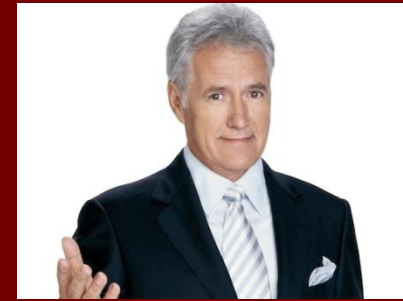- Custom Fields Tab

5 – 200 pts

5 – 400 pts

- Besides DDI-Connect, what other services does DDI offer?

- File Server Hosting
- Web Server Hosting
- Remote Desktop Services
- Outlook
- Client Consulting and Training

5 – 100 pts

- Who looks more like Alex Trebex, Kyle or Tom?

- Tom

5 – 100 pts

5 – 300 pts

■ Per DDI's SLA (Service Level Agreement) a support request is considered "High Priority" when…

Support Request Priority Levels

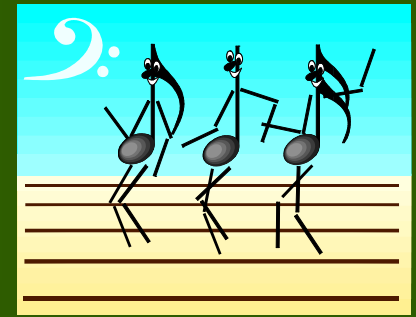|	
Urgent	Client is unable to perform work because existing DDI products or services cannot be accessed or used.
High	Client is able to perform work but is experiencing problems with existing DDI products or services that interrupt normal work activity.
Moderate	Client experiences occasional problems with existing DDI products or services with minimal disruption to normal work activity.
Low	Client suspects or has identified an issue that DDI should address when time permits.

5 – 500 pts

- What cities is your DDI-Connect data stored in?

- Indianapolis, IN
- Columbus, OH
- Physical backup send to a facility called Iron Mountain

Final Jeopardy

- Type question to appear here

- Type answer to appear with a mouse-click here