# Getting Started with
LUCIS Software v.3 for Windows

    This chapter assumes the LUCIS Software for Windows has been installed. Copies of the software and installation instructions are available from the Download page of our web site (http://luc.adventist.org/lucis/login.php?afterlogin=filesupport.php). Please note that though you can download and install the software it requires a registration key to operate. Contact lucis@luc.adventist.org for more information.

    Click "Start" > "Programs" > "LUCIS Software" > "LUCIS Software Manager" to start the program. Except in special situations the LUCIS Startup and Configuration Wizard will automatically activate if this is the first time starting the program.

LUCIS Startup Wizard (Back to Top)
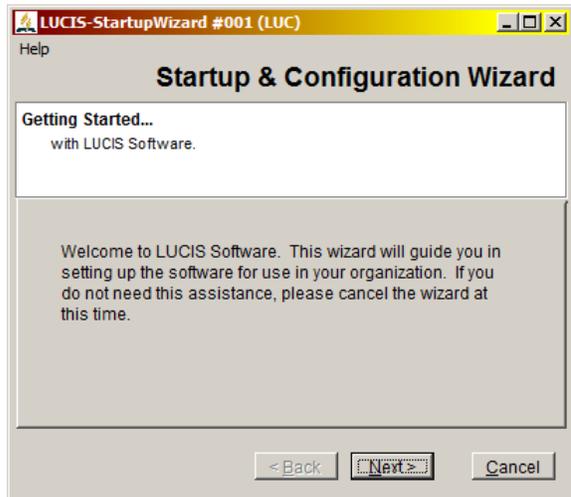
The LUCIS Startup Wizard will set up and configure the software for the modules licensed. If you will be copying LUCIS data from another computer, click [Cancel] to advance to the LUCIS Software Manager so you can exit the software to copy files.

The first startup step is to identify your organization type. This will allow the wizard to create the correct databases. Click [Next >] to continue.
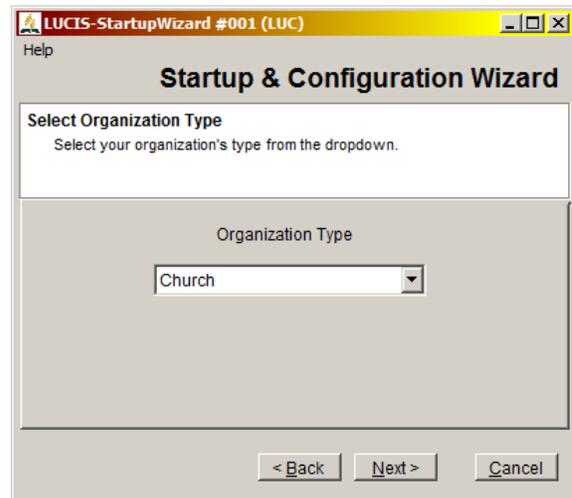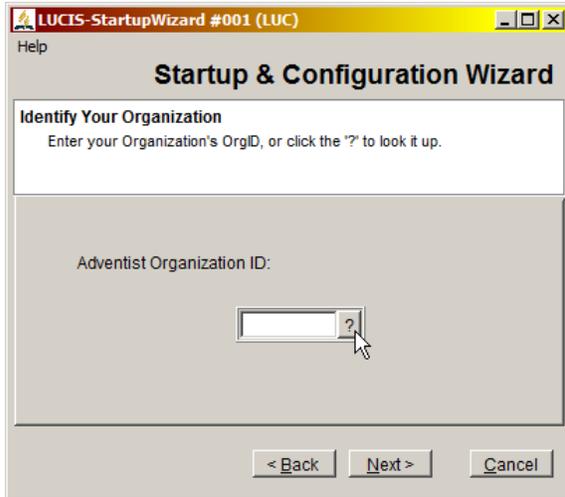
After identifying your organization type you will need to provide your organization's ID assigned by the General Conference. If you do not know your OrgID click [?] to activate the LUCIS Adventist Entity Query to locate it (see below for instructions). Click [Next >] to continue or [< Back] to go back to the previous step.

The LUCIS Adventist Entity Query is a good introduction to the characteristics of LUCIS query screens. It allows you to easily search multiple ways to locate Adventist organizations worldwide to retrieve their official ID (OrgMastID). Consult the LUCIS Adventist Entity Query chapter for full information on how to use this lookup.
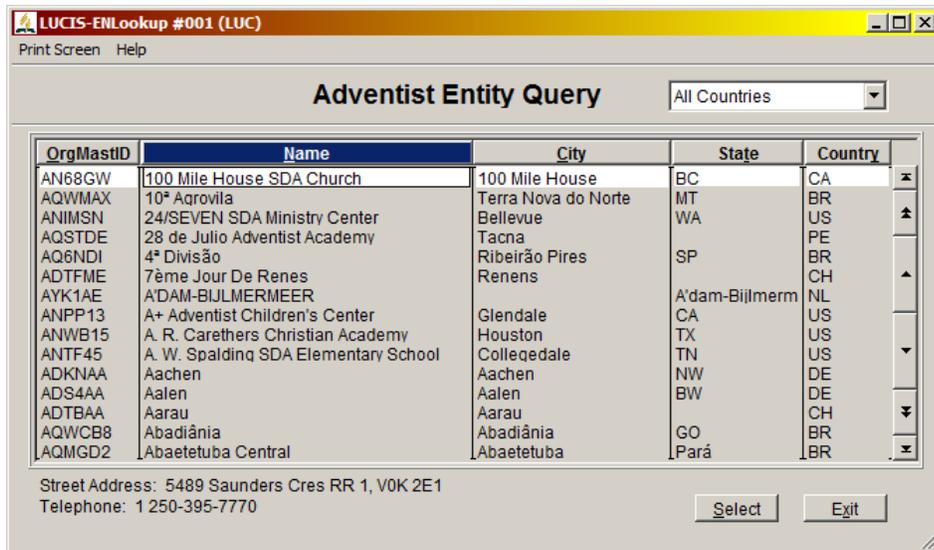

If you cannot find your organization in the Entity Query select your parent organization instead (e.g. conference) then change the last two digits from one-one (11) to zero-zero (00). This is a temporary ID that can be used until your support can help you with your correct organization ID.
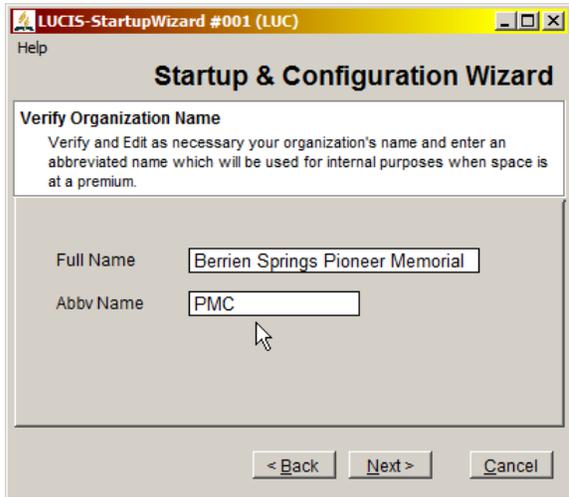
Once you have provided your organization's ID the wizard will ask you to confirm the spelling of its name (you can edit the spelling if needed) and abbreviated name to be used internally when space is at a premium. Click [Next >] to continue or [< Back] to go back to the previous step.

After confirming your organization's name you will be able to edit its address if needed. This address will be used for statements and other documents. Click [Next >] to continue or [< Back] to go back to the previous step.
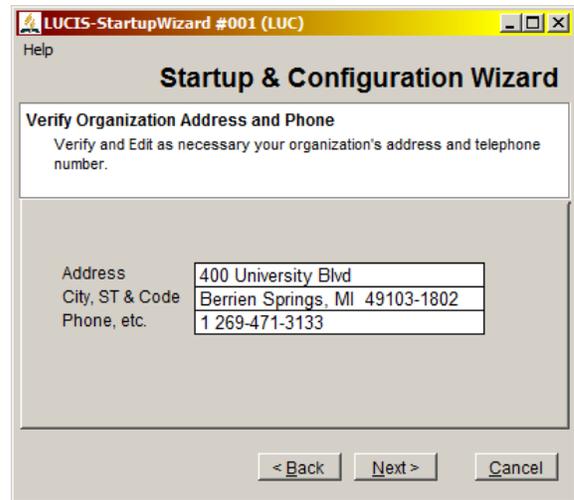
Next you will be asked if you will be importing data from The Church or School Accountant software. Respond as appropriate then click [Next >] to continue or [< Back] to go back to the previous step.
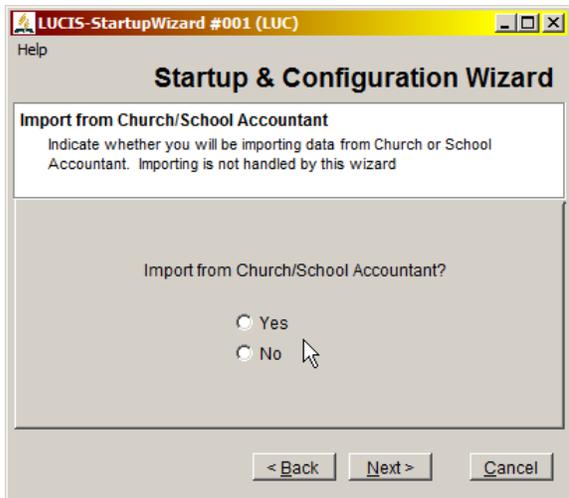
If you responded "No" to import from The Church or School Accountant you will be asked to provide the ending month of your *LAST COMPLETED** accounting year. If you are on a July-June fiscal year specify June as your ending month.
*Your last finished accounting year; NOT the current accounting year.*

LUCIS-StartupWizard #001 (LUC)

Startup & Configuration Wizard

Last Completed Fiscal Year
Select the ending month and year of your last fiscal year.

Ending GL Month   December

Ending GL Year   2007

< Back   Next >   Cancel

LUCIS-StartupWizard #001 (LUC)

Help

Startup & Configuration Wizard

Donations Year
Select the year you wish to start entering donations.

Starting Donations Year   2008

< Back   Next >   Cancel

If you have a church license and responded "No" to import from The Church Accountant you will be asked to provide the *CURRENT* Donation year. Donation years are calendar years even if your accounting year is a non-calendar fiscal year. Click Next > to continue or < Back to go back to the previous step.

Provide your initials to use as a user ID and your full name. This information is only used to set up controls for your LUCIS Software login and is not used for any other purpose. Click Next > to continue or < Back to go back to the previous step.

LUCIS-StartupWizard #001 (LUC)

Help

Startup & Configuration Wizard

Setup User Information
Enter the userid you wish to use to logon to LUCIS, typically your initials. The first time you login leave your password blank.

ID (Initials)   JXD

Name   Jane X Doe

< Back   Next >   Cancel
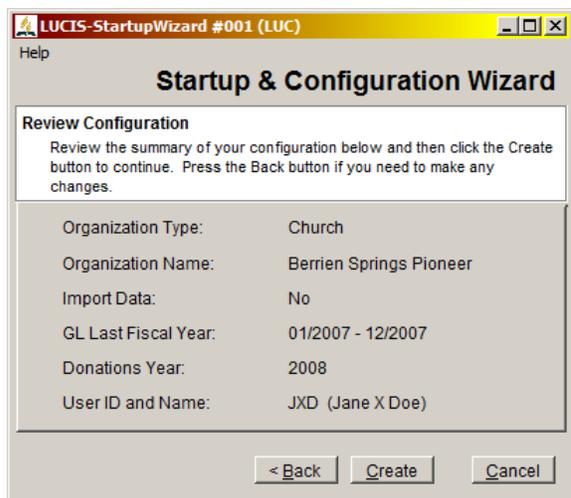
The last step is to review the information you entered. Click ⟨< Back⟩ to go back to any previous step to edit your information. Click ⟨Create⟩ to finish your setup.

LUCIS Manager (Back to Top)

Once your setup and configuration is complete the LUCIS Manager login screen will appear.

Login (Back to Top)

Some licenses have an automatic login (in these cases no further login action is necessary). If the initial window shows entry areas for ID and password you must log in (neither the ID nor password are case-sensitive, i.e. they will work with all upper-case, all lower-case, or a combination).

If you set up a User ID with the Startup Wizard, enter that ID (your initials), skip the password then click ⟨Login⟩.

If you did not set up a User ID with the Startup Wizard, use ID "LUC" with password "Demo" then set up a new User ID using the LUCIS ID Editor (click "Tools" > "User IDs" then "Add"). Once you have set up an ID, logoff then login with your new ID without a password.

New IDs are set up without a password. The first time you login with a new ID, leave the password blank – the software will detect that you are using a new ID and ask you to set up a password that will be required for subsequent logins before continuing.

Helps (Back to Top)

Even before you log in you can access the help menu. To access the on-line documentation helps click "Help" > "Contents". Navigate using links the same way you surf the Internet. The LUCIS Helps chapter explains the different help features.

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If you have not read the [LUCIS Software Introduction](#) do so at this point. It can be accessed from the "[Helps](#)" > "[Contents](#)" menu item. The introduction contains information that will help you understand and use the software.

The software is composed several application modules. Those that show up on the menu depend on your license. See [LUCIS Software Manager](#) more details. Additional setup steps must be performed depending on your organization type. Refer to the following chapters for detailed instructions depending on your organization type:

CHURCHES – [LUCIS Setup for Churches](#)
SCHOOLS – [LUCIS Setup for Schools](#)
OTHER – [LUCIS Setup: Miscellaneous](#)