

This is a chapter from the LUCIS Helps. The links do not work in pdf format. Use the LUCIS Helps for full functionality.

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# LUCIS Software Introduction

The LUCIS Software gets its name from its developers: the **L**ake **U**nion **C**onference **I**nformation **S**ystems department (the Lake Union Conference is one of the nine unions that make up the North American Division of the Seventh-day Adventist Church). LUCIS Software is developed for and meets the specific needs of Seventh-day Adventist organizations.

## **Brief History** ([Back to Top](#))

The development group at the Seventh-day Adventist Lake Union headquarters has been providing software for the Seventh-day Adventist church for over 30 years. During that time period the group has developed software for both financial and non-financial needs of the church. However, it has concentrated on financial applications for the last 10 years. The department maintains expertise in accounting and treasury-related policies and practice, works closely with the General Conference Auditing Service (GCAS), and has been active in working with the General Conference in the development of global financial reporting standards.

Though originally developed for Lake Union conferences, schools, and other church organizations, the LUCIS Software has found wide-spread use outside of the Lake Union territory since the early 1980s – the vast majority of users are outside the Lake Union territory including organizations in other world divisions. Over the years the department has honed its skills in providing long-distance support economically.

## **Version 3** ([Back to Top](#))

The LUCIS Software v.3 (Windows) is the latest reincarnation of the software. It was developed specifically for the Microsoft Windows environment (Windows 98 and more recent). The software was reengineered from the ground up to make use of current technology, techniques and our experience. The software is released in one of five [editions](#) depending on the complexity and sophistication of accounting required.

**Import/Export:** Version 3 will [import](#) databases from other software as well as [import](#) and [export](#) data to and from other sources.

**Standards and Auditing:** The software supports current and planned General Conference global coding standards. Features to insure audit trail, integrity of data, etc. are a standard part of the software. Where desired licenses to a restricted version of the software can be supplied for GCAS auditing use. This is coordinated through the district or area audit office. The GCAS-specific restricted license does not allow entry or updating of data but does permit the use of the query, export, validation, and reporting features. This license is currently being used by several GCAS auditing offices in the North American Division.

## System Requirements [\(Back to Top\)](#)

We have not yet encountered hardware limitation problems regarding the use of the LUCIS Software so we have not been able to determine a minimum requirement yet. It appears that any computer running Windows 98, or more recent, with any kind of major application such as Word, WordPerfect, Open Office, Excel, Lotus 123, Quatro Pro, or similar is more than adequate.

We have tested, and the software is currently running, on all Windows operating systems from Win98 and forward, including Windows Vista. Networks include Novell Client-Server networks, Windows networks (peer-to-peer, NT, 2000, XP, 2003) and stand-alone. In some cases the software is installed for stand-alone off-site use on notebook computers and network use when attached to the network. The software is also running under a Citrix thin-client system using Windows 2003 server. All these configurations are used with our v.2 Classic software as well as the version 3.

Fujitsu is the supplier of our development tools and the runtime that accompanies our software. Their web site indicates that Linux is a supported operating system but we have not yet tested that. We hope to do so in the future so we can add that option to our tested environments.

## Software Editions [\(Back to Top\)](#)

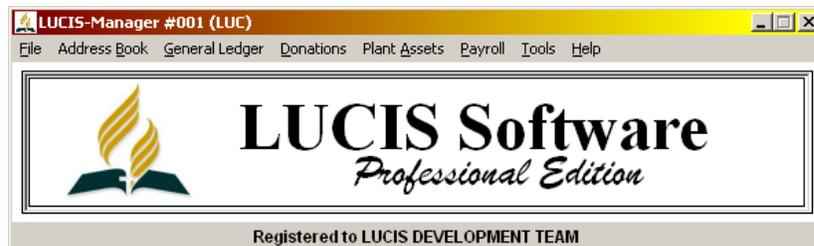
LUCIS Software v.3 is released in five editions: Lite, Standard, Standard Plus, Advanced, and Professional. These editions vary in the complexity of accounting provided for and support different database levels. Check the introduction for each application module for edition specifics.

Feature	Lite	Std	Std+	Adv	Pro
Preset Controls	X	X	X		
User-Customizable Controls			X <sup>1</sup>	X	X
Specialized Single Transaction Entry	X	X	X	X	X
General Multi-Transaction Batch Entry				X	X
External Entry Import	X <sup>1</sup>	X <sup>1</sup>	X	X	X
Standard Reports	X	X	X	X	X
Standard Report options		X	X	X	X
Advanced Report options				X	X
Custom Report options			X <sup>2</sup>		X
Lower Edition Emulation			X <sup>2</sup>	X <sup>2</sup>	X <sup>2</sup>
Data Export				X	X
Image Attachments/Viewer					X

Notes: <sup>1</sup> limited    <sup>2</sup> with support option

## LUCIS Manager [\(Back to Top\)](#)

The [LUCIS Software Manager](#) is the initial screen that appears when starting the LUCIS Software. Once you have logged in, the manager is used to start various processes via its menu. Only modules covered by your [license](#) appear on the menu.



## **Helps & Tooltips** ([Back to Top](#))

To assist you with understanding the software a Help menu selection is located at the top of most windows. Click it to display the help chapter applicable to the window. For access to the [helps contents](#) click "Help" > "Contents" in the [LUCIS Software Manager](#) – refer to the [LUCIS Helps](#) chapter for instructions on how to use the helps.

In addition to the helps, most data fields on the windows have tooltips. A tooltip is a short message displayed for a couple of seconds when the mouse pointer is positioned over the entry area on the active window (no clicking necessary).

Use the helps and tooltips to assist in understanding the software.

## **Keyboard Use** ([Back to Top](#))

The LUCIS Software is keyboard friendly. That means navigation in the software by keyboard is easy and tends to be faster than using the mouse where speed is of concern e.g. it allows using the numeric keypad by itself for much entry work. Several rules-of-thumb are helpful.

**Enter vs. Tab:** Though the [Tab] key can be used to advance through a screen, because of the way Windows interprets the [Tab] key, it cannot be used to advance to the next expected area within certain controls – tables for instance. The natural key of preference within the LUCIS Software to advance to the next logical entry area is the [Enter] key. So the rule-of-thumb is to use [Enter] instead of [Tab] to progress naturally through entry areas in a window. Hold the [Shift] key when pressing [Enter] to progress backward through the entry sequence. NOTE: the arrow keys are used to navigate in Query windows – [Enter] is used to select the highlighted entry.

**Arrow Keys:** The Arrow keys can be used to move on-screen in specific directions. These keys are particularly useful in the Query programs.

Ctrl-Arrow – To avoid interfering with Windows treatment of directional keys, hold down [Ctrl] when using arrow keys to progress among discrete components on most non-query screens – i.e., if you do not get the reaction you expect when using an arrow key, hold down the [Ctrl] key at the same time ([Ctrl] is optional in the Query screens).

Alt-Arrow – Another use of the Arrow keys is to scroll forward and backward among records in the record editor programs (AD Address Editor, GL Account Editor, DN Donor Editor, DN Offering Editor, etc.). When the record ID entry area has focus (i.e., the cursor is at the record ID entry), hold down the [Alt] key then press one of the arrow keys – [DownArrow] or [RightArrow] will scroll forward in sequence, [UpArrow] or [LeftArrow] will scroll backward in sequence.

**Page Keys:** Hold the [Ctrl] key down then press [PageUp] or [PageDown] to advance among screen sections. In the Query programs these keys advance forward and backward a screen at a time ([Ctrl] is optional in the Query screens).

**Query:** Many entry areas end with a  button. Clicking  will activate a query lookup. Pressing the [?] key (shifted or not) while in the entry field will also activate the lookup. NOTE: the numeric keypad substitute for [?] is the [/] key (the same as the lower-case of the [?] key).

**Equal:** In entry screens, pressing the [=] key while in an entry field will automatically populate the field with the value immediately above. In the case of entry screens with a total amount, pressing the [=] key, while in the total amount field will populate it with the total of the detail on the screen. NOTE: the numeric keypad substitute for [=] is [\*].

**Alt-Keys:** Alt-key shortcuts are provided for all menu items, tabs, and action buttons. These are noted by underlined characters. If you are using Windows 2000 or more recent these underlines may not show up automatically (whether they do or not is controlled by Windows settings). Pressing the [Alt] key by itself in this case will switch Windows temporarily into the Alt-key display mode.

## Query Lookups ([Back to Top](#))

A major feature of the new LUCIS Software is the powerful lookup queries. Everywhere you are required to identify an account, individual, offering or entry you will find a  button. Click this button (or [press \[?\]](#) in the adjoining entry area) to activate the applicable query-lookup-search window to select a record or just to locate information. To start the query at a specific point, enter all or part of an ID/Code/Number or the first three or four letters of the name in the adjoining entry area before activating the query.

Accounts: [GL Account Query](#)

Individuals: [AD Address Query](#), [DN Donor Query](#)

Offerings: [DN Offering Query](#)

Entries: [GL Ledger Query](#), [DN Donations Query](#)

These queries allow you to sort and search your data to locate specific records (the queries also have buttons that will allow you to add new records or edit existing ones during the query process). It will be well worth investing some time studying the query [helps](#) to learn how powerful and useful these queries can be to you.

## Printing ([Back to Top](#))

The LUCIS Software sends most print output to a viewer where the it can be viewed prior to printing. In most cases "printing" is the same as "send the output to the viewer". Whether you actually print the report/list from the viewer is up to you. It is common, when experimenting, to run a report/list multiple times with different options to see the results.

Most major word processing programs can be [substituted for the viewer](#) e.g., Word, WordPerfect, Open Office, etc. though it is recommended that you use the viewer installed with the software since its response time is usually faster.

Each window in the LUCIS Software has a Print menu item at the top of the window. In most cases it includes "Print Screen" and "Print Report". In cases where a report is not applicable only "Print Screen" appears. Where other print options are applicable they will also be included.

**Print Screen** – prints an image of the window (direct to printer)

**Print Report** – calls the appropriate list/report program associated with the data in the window. Options can then be selected to refine the contents of the report/list. Report/List programs are also listed separately in the Reports section of menu for each module in the LUCIS Manager.

**Print Setup** – saved print preferences for the normal output created by the window.

## Window Size ([Back to Top](#))

The LUCIS Software has a rather unique feature. Most window programs allow you to resize the window but do not rescale its contents (the text is the same size regardless of the size of the window). When you resize a window in the LUCIS Software the text and entry areas are automatically rescaled proportionately. With the advent of higher resolution displays, this allows you to rescale the text and entry areas to make them easier to see – the equivalent of Large Print.

The software automatically "remembers" the size and position of each window when it was last used so it will come up the same the next time you use it (unless the Reuse Last Window Position [setting](#) has been turned off).

## Data Length ([Back to Top](#))

The software uses variable-pitch fonts (i.e., different characters take up more or less space than other characters—capital letters take up the most). Because of this, the number of characters that can be entered may exceed the space provided on the entry screen. Since the fonts used for printing are proportional to the screen fonts, the entry areas on the screens have been sized for the space provided on standard reports. If your text exceeds the visible entry area you are likely to have undesirable results on reports (information following the excessive data may be pushed out of alignment).

## Multiple Windows [\(Back to Top\)](#)

Within the LUCIS Software, multiple LUCIS application windows may be open simultaneously i.e. you may select a main menu item even if you have not closed the last menu item selected – both will be active at the same time. In some cases an action on your part may cause the software to attempt to open a window that is already open. If this happens you will be instructed to close the open one before it can use it. For example, the entry programs use the Query for lookups when requested. If the Query is already open it will ask you to close it first.

## Open File [\(Back to Top\)](#)

Each application window uses a primary file set (ledger, address book, etc). The full path/filename of the file set in use is noted in the bottom left-hand corner of the window. When an application window is first activated, the initial file set opened for the window is the last one used by you for that application module. This is usually the file set you want. However, if you have not previously used the application module, or you want to use a different file set, use the File menu in the application window to select another one. This will have no affect on the other open windows.

Ref 2	+	Accounts or Memo	Amount	D/C
1			?	
2			?	
3			?	
4			?	
5			?	
6			?	
7			?	
8			?	
9			?	
10			?	

**Application File Menu:** Up to eight most recently used file sets for the application area by you are listed in the application file menu (1 being the most recent). This file list only includes files appropriate for the window.. A checkmark indicates files currently open. To open any of the listed files click on the file name – the window will switch to the file selected even if it is in use by another window. If the file desired is not listed, click "Open" to activate a browse to locate the file set. The software will warn you if there is information on the screen that will be lost and allow you to save it before switching to the new file set.

Exiting from a window will automatically close the open file set for that window so the "Close" menu option is not normally used. However, if you click "Close" the program will close the currently opened file for the window and disable the window until another one is opened – this has no effect on other windows that may have the same file set open.

The "Remove Filename" menu option allows you to remove filenames from the list (it has no effect on the file set itself). If a file set has been moved, and the path in the list is no longer correct, removing the filename from the list avoids an error if you leave it in and accidentally select it.

**Multiple Files:** The software will allow you to have multiple open windows and each window can be using a different file set, sharing a file set, or any combination. Be careful to check the path/filename at the bottom left in the window, and the subtitle of the window, to confirm that the file set being used by the window is the one intended. This is particularly important if you have been accessing files other than your current one for query or reporting purposes. Do not ignore warnings regarding out-of-range dates – you may not be using the data file you think you are!

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**CHURCHES:** If you have been using **The Church Accountant** software see [LUCIS Software Orientation for The Church Accountant User](#) for an orientation of the LUCIS Software from the perspective of a Church Accountant user . For instructions to import Church Accountant Data to the LUCIS Software see [Transferring Church Accountant Data to LUCIS for Windows](#).

For all other churches, see [LUCIS Setup for Churches](#).

**SCHOOLS:** If you have been using **The School Accountant** software see [LUCIS Software Orientation for The School Accountant User](#) for an orientation of the LUCIS Software from the perspective of a School Accountant user . For instructions to import School Accountant Data to the LUCIS Software see [Transferring School Accountant Data to LUCIS for Windows](#).

For all other schools, see [LUCIS Setup for Schools](#).

**CONFERENCE/MISSION OFFICE:** If you have been using the **LUCIS Classic Software** see [Importing Classic LUCIS General Ledger into LUCIS for Windows](#).