

## Passing KairosDonor From One Financial Secretary to Another

This tutorial will guide you through a proven process for passing the KairosDonor program and historical financial transactions from one Financial Secretary to the next one.



### **Current Financial Secretary Creates a Data Backup**

Plug a USB Flash Drive into your computer and start up KairosDonor. Click the Setup & Maintenance button, and then the Data Management button, and then the Data Backup button. Select the removable drive from the list of drives and begin the backup.



### **Install KairosDonor from the CD on the New Financial Secretary's Computer**

Take the KairosDonor CD to the new Financial Secretary and install the software on their computer. Then, start up KairosDonor and go through the initial setup. When you get to the screen where the current balances and outstanding transactions are asked for, just click the Next button to go through it (we will set up the correct financial information when we load the historical financial transactions from the previous Financial Secretary). **It is CRITICAL that you go through this initial setup process before doing any other activities.**



### **Download the Latest Service Pack for KairosDonor**

Now that you have installed the software **and gone through the initial setup**, you should install the latest KairosDonor Service Pack. This is an update to the KairosDonor software and it is critical to install it.

You do this by going to [www.kairosdonor.com](http://www.kairosdonor.com) and downloading the Service Pack. It is highly recommended that you save the Service Pack to your Desktop. Then, once the download has completed, double click on the downloaded icon on the desktop and follow the installation instructions. Make sure you are NOT running KairosDonor while you are doing the installation.



### **Restore the Financial Transaction History Data**

Plug in the USB Flash Drive that the previous Financial Secretary used to do their Data Backup on. Then, start up KairosDonor. Click the Setup & Maintenance button, then the Data Management button, then the Data Restore button. Select the removable drive from the list of drives, and begin the Loading of the data. When the load is complete, you should Exit from Kairos Donor. Start KairosDonor back up and you will have the updated software and the financial history exactly as the previous financial secretary did.



### **Previous Financial Secretary Trains the New Financial Secretary**

Now, the previous Financial Secretary, who has experience running KairosDonor, should spend some time with the new Financial Secretary, going over the basics of KairosDonor. Take some time to help the new person get their feet on the ground by benefiting from the experience of the previous Financial Secretary.