Importing 2nd ID's (Archdiocesan ID #'s) Into PDS from a File Provided by the Archdiocese

It is extremely important that you follow this process EXACTLY as described. Failure to do so could result in damage to your PDS database. Please do a backup first!!

Step #1: Create a Manual Backup from PDS Church Office

- Go to File | Backup/Restore | Backup Current Data
- Select the Specific Folder option (as shown):

Back Up Current Data

Warning: This warning: Warning: Wed	vill back up data for all programs sharing the same data file. Feb 6, 2019 at 7:58 AM Automatic Backup - Periodic
You should back u data which you ca an archive on you	p your current data periodically. This process creates a file that is an exact copy of your n restore from later. The program also automatically saves a copy of the backup file in r hard drive.
Backup Reason:	User Requested Backup
Backup Method:	Back up to a selected drive. Erase prior backups on that drive. Back up to a specific folder. Old backups in that folder are saved. Back up to an Internet ETP Server.
Backup Folder:	C:\Users\PDSUser\Desktop\
	Start <u>B</u> ackup Close

- Click the Browse button to choose a destination directory where the backup file will be saved. The desktop is fine.
- Click on Start Backup to begin the backup process. When complete, click the Close button.

Step #2: Import the 2nd ID #'s from the file provided by the Archdiocese

- After completing the backup in step #1, click on File | Import Data | Import Family Information.
- Please be absolutely sure that you check the checkbox next to 'Advanced Options/Update Existing Information (as shown below):

Import Family Information						
Import Family Information	Import Family Information to PDS Church Office Program					
Avanced Options / Updat	e Existing Information					
File Information Key / Env	Number Name / Details	Address	Phone / Email	Keywords / Remarks	Process	
Import File Path and Name: CSV Path / File: File Includes Field Names / Header Total Number Records:						

• Then, click the BROWSE button to locate the file for import. Once you've selected the .CSV formatted file and clicked OPEN, you'll see a screen that looks like the following. Note, your families will be showing in the list:

Import Family Information to PDS Church Office Program

Advanced Options / Update Existing Information

Import File Path and Name: CSV Path / File: C:\Users\Users\Desktop\BackToParish_SampleFile.CSV Browse Import File Path / File: C:\Users\Users\Desktop\BackToParish_SampleFile.CSV Browse Import File Includes Field Names / Header Total Number Records: 4 ArchID Unique_FamId Parish Family Number Last Name First Name Spouse First	e Information	Key / Env Number	Name / Details A	Address Phone / Emai	Keywords / Rer	marks Process	
CSV Path / File: C:\Users\Users\Desktop\BackToParish_SampleFile.CSV Browse File Includes Field Names / Header Total Number Records: 4 ArchID Unique_FamId Parish Family Number Last Name First Name Spouse First Name S 5101047 438582 1 Smith John Susie 1769686 6861 2 Martinez Caridad Carmen 1 1141566 6862 3 Andre Carmen 1 5045044 6496 4	Import File Path and Name:						
ArchID Unique_FamId Parish Family Number Last Name First Name Spouse First Name <	CSV Path / File: C:\Users\Users\Desktop\BackToParish_SampleFile.CSV Browse						
ArchIDUnique_FamIdParish Family NumberLast NameFirst NameSpouse First NameS51010474385821SmithJohnSusie1176968668612MartinezCaridad1114156668623AndreCarmen1504504464964AngelesSusieJohn	File Includes Field Names / Header Total Number Records: 4						
5101047 438582 1 Smith John Susie 1769686 6861 2 Martinez Caridad 1141566 6862 3 Andre Carmen 5045044 6496 4 Angeles Susie	ArchID	Unique_FamId	Parish Family Nu	mber Last Name	First Name	Spouse First Name	
1769686 6861 2 Martinez Caridad 1141566 6862 3 Andre Carmen 5045044 6496 4 Angeles Susie John	5101047	438582	1	Smith	John	Susie	
1141566 6862 3 Andre Carmen	1769686	6861	2	Martinez	Caridad		
5045044 6496 4 Angeles Susie John							
Angeles Base Base	1141566 6	6862	3	Andre	Carmen		

 Please double check that the fieldnames as shown above are displayed with the proper family information in each column. Do not continue if there are any discrepancies in the fieldnames and data in each column. Click on the Key / Env Number tab at the top and complete the screen as follows. Be sure to check all items to make sure they match what is shown. Failure to do so could result in damaged data via incorrect import:

Import Family Information to PDS Church Office Program
Advanced Options / Update Existing Information
File Information Key / Env Number Name / Details Address Phone / Email Keywords / Remarks Process
O Add new records.
 Update current data ONLY - do not add new families. Update current data and ADD new family record if Family Key not found.
Family Key: Unique_FamId Must be the same Family Key used to connect members to their family.
O Use the PDS Fam ID/Envelope Number to match families.
 Use the Family Import Key to match families. Use the PDS Family Unique ID Number (exported from PDS) to match families.
ID/Env Number: (Do Nothing) V Envelope User: (Do Nothing)
Required Field
Start New ID/Env Numbers with: 100000 Families with no existing ID/Env will be issued numbers
beginning with this number
2nd ID Number:
Family is Active/ Inactive: (Do Nothing)
○ Yes or True means Active
Yes or I rue means inactive
< <u>B</u> ack <u>N</u> ext > <u>C</u> lose

• Do not alter any of options on the other tabs (shown circled):

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File Information Key / Env Number Name / Details Address Phone / Email Keywo	rds / Remarks Process
Click on the Process tab and then click on the Pre-Import Data Checl	k:
Import Family Information to PDS Church Office Program	
Advanced Options / Update Existing Information	
File Information Key / Env Number Name / Details Address Phone / Email Keywords / Remarks	Process
Π	
Pre-Import Data Check Begin Impo	ort

• That will produce a screen that will look something like the following. Scroll through the results and be sure that all of the lines end with '....will be updated':

2) Family found ID: 100001 -	- will be updated		
 Family found ID: 100002 - Family found ID: 100003 - 	- will be updated		
Pre-Import Check Complete			
re-import one on plote			
See Report File: E:\PDSCHUP	RCH8_StewardshipGood\Data\BackToParish_	SampleFilePreImportFamReport.txt	
See Report File: E:\PDSCHUF	RCH8_StewardshipGood\Data\BackToParish_	SampleFilePreImportFamReport.txt	
See Report File: E:\PDSCHUF	RCH8_StewardshipGood\Data\BackToParish_	SampleFilePreImportFamReport.txt	

- When you are satisfied with the Pre-Import check, click the Begin Import button and the import process will commence.
- When complete, you will be presented with a window like the following:

1) Family found ID: 100000 data updat 2) Family found ID: 100001 data updat 3) Family found ID: 100002 data updat 4) Family found ID: 100003 data updat Conversion Complete	ed ed Information X	1	^
See Report File: E:\PDSCHURCH8_Stewar	Import Complete	SampleFileFamImportReport.txt	~
	ОК	Begin <u>I</u> mport	

- Click OK and then FINISH to complete the process.
- This should import the Archdiocesan ID #'s into the Second ID field in PDS.
- Congratulations and thank you for your assistance.