

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 will back up data for all programs sharing the same data file.
Last Backup: Wed, Feb 6, 2019 at 7:58 AM Automatic Backup - Periodic

You should back up your current data periodically. This process creates a file that is an exact copy of your data which you can restore from later. The program also automatically saves a copy of the backup file in an archive on your hard drive.

Backup Reason:

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 FTP Server.

Backup Folder:

- 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 to PDS Church Office Program

Advanced Options / Update 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

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: 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		
1141566	6862	3	Andre	Carmen		
5045044	6496	4	Angeles	Susie	John	

- 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 X

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

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: Must be the same Family Key used to connect members to their family.

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: Envelope User:
 Required Field

Start New ID/Env Numbers with:
 Families with no existing ID/Env will be issued numbers beginning with this number

2nd ID Number:

Family is Active/ Inactive:
 Yes or True means Active
 Yes or True means Inactive

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

File Information | Key / Env Number | **Name / Details** | Address | Phone / Email | Keywords / Remarks | Process

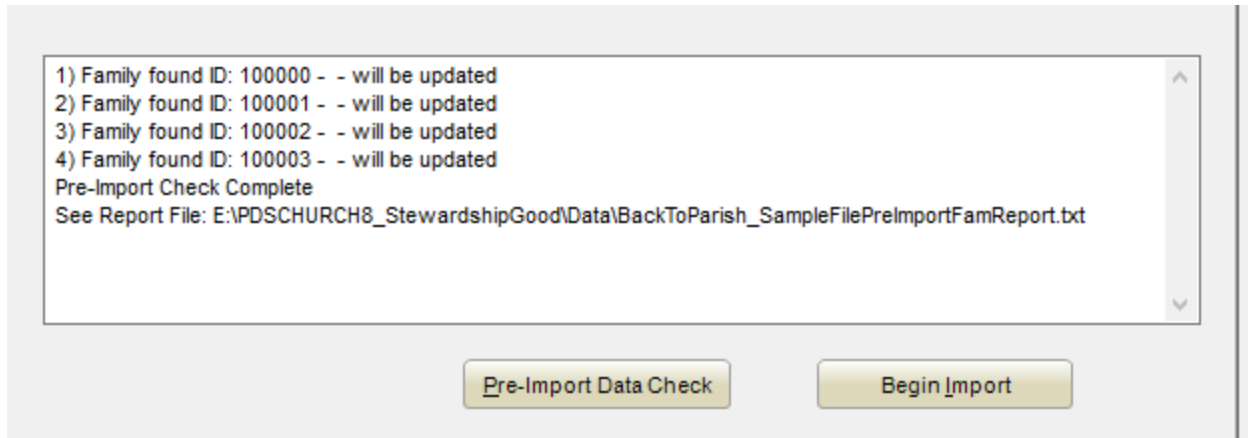
- Click on the Process tab and then click on the Pre-Import Data Check:

Import Family Information to PDS Church Office Program

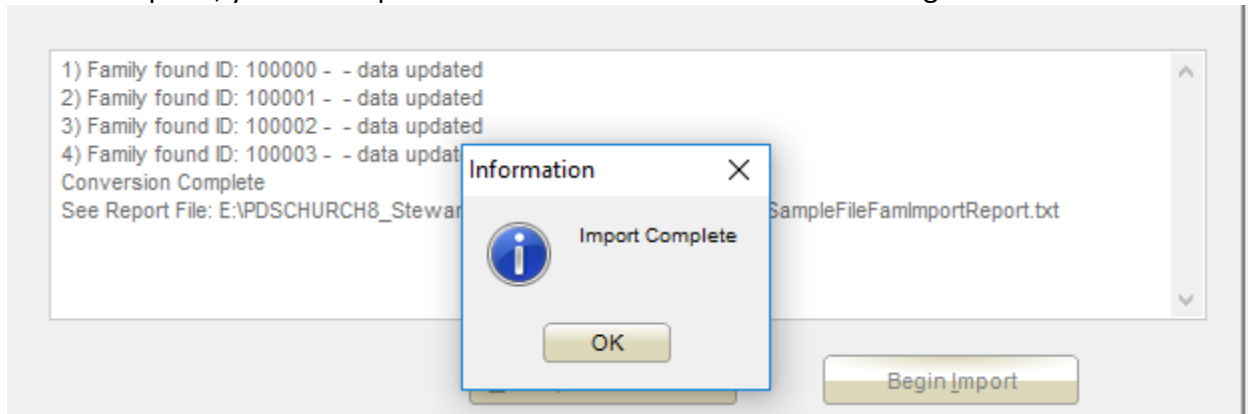
Advanced Options / Update Existing Information

File Information | Key / Env Number | Name / Details | Address | Phone / Email | Keywords / Remarks | **Process**

- 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':



- 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:



- 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.