Families/Households – Family Keywords

To have a successful migration, it is essential that all keyword lists in PDS are setup correctly and have on-going usefulness for the staff of your parish.

WHY DO WE USE KEYWORDS?

Keywords are used to provide information about a family for reporting or filtering purposes. They are maintained in a picklist format and must be entered consistently each time. This allows for accurate reporting. If you type the word or phrase and do not type it exactly as previously entered, it makes it impossible to report on that information. There are many keyword-type fields in PDS. We are focused on the Family Keyword section in the bottom right corner of the Family screen:


There will be four steps to this cleaning process, prior to migration:

1. Determine which of your Family Keywords can be deleted entirely as they are no longer useful to you or your staff.
2. Of those that remain from step #1, have your staff members create a definition for each of them, so that the entire staff understands what they mean.
3. Of those that remain from step #1, determine which you think will have a global meaning across the Archdiocese and should be shared with all parishes. These will be mapped to a standard shared keyword field. Please email Bryan Gummersall a list of these that you think should be considered for global Archdiocesan-wide use.
4. The ones that remain from steps #1 and #3 will be unique and are still important for your parish. These will be custom "site specific" fields that the implementation team will need to help configure.

Step 1 - Determine Which Family Keywords can be deleted entirely:

Select: FILE | Keywords | Keywords | Family/Fund Keywords | Family Keyword Names

That will bring up a screen that looks something like this:
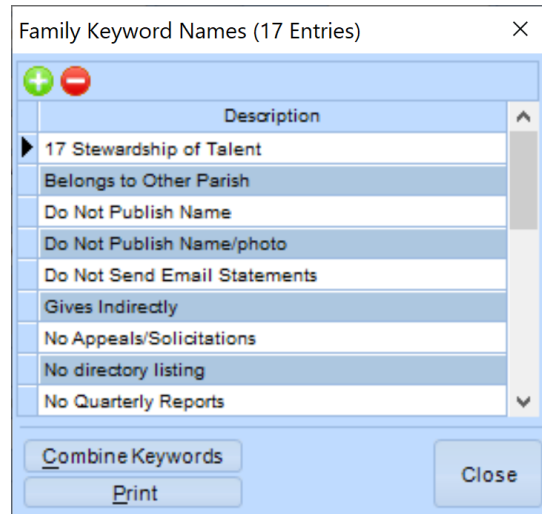
Select: PRINT to print a list of the Family Keywords to paper, Excel or PDF

Distribute this list of Family keywords to your staff for review. Have your staff go through a process of determining which keywords no longer have value. An easy way to start this process is consider the following question "can we determine this information with other data we have in the database?"

After completing your review process and determining which can be deleted, return to **FILE | Keywords | Keywords | Family/Fund Keywords | Family Keyword Names** and use the 🔴 icon to begin the deletion process. Be very careful as this process is irreversible. It would be good to have a current backup done prior to this process, just in case a mistake is made. A deletion from this keyword maintenance process fully deletes the keyword from the list and from any Family screen where it was present. Again, be very careful!

Step 2 - Create a Data Dictionary in Excel for the remaining Family Keywords:

Select: FILE | Keywords | Keywords | Family/Fund Keywords | Family Keyword Names

Select: PRINT and then on the Select Printer window, click on PREVIEW.
This will allow you to then select PRINT again and have the Print to File option available. Please print to Excel:
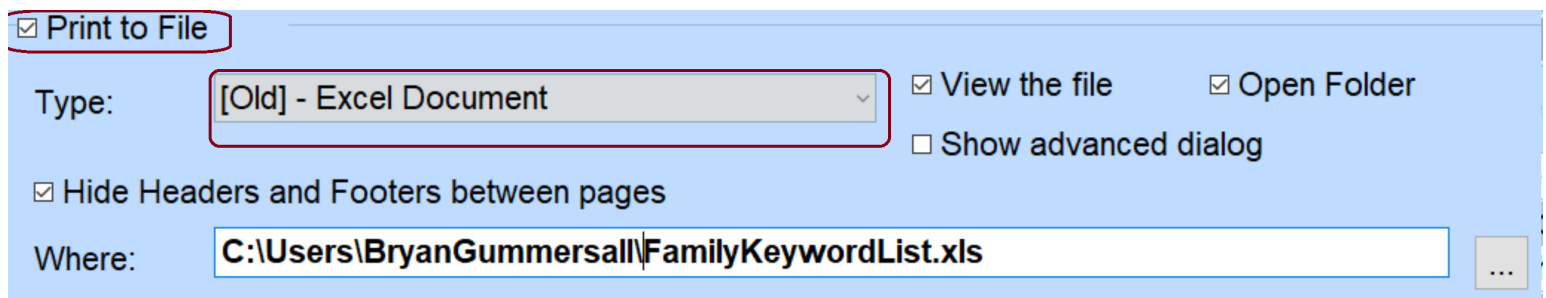
Then, in Excel, you can add two columns, one to use to define the keyword and the other to denote whether each keyword is unique (site specific) to your parish or something that should be considered for a shared Archdiocesan-wide keyword. The format of your final Excel worksheet might look something like this:

Keyword	Definition	Shared or Unique?
Do Not Publish Name		
Do Not Publish Name/photo		
Do Not Send Email Statements		
Gives Indirectly		
No Appeals/Solicitations		
No directory listing		
No Quarterly Reports		
Online Giving		
Parish Directory - 2016		
School Famil - Current		
School Family - 14/15		
School Family - Prior Years		
Send 17 Stewardship Talent TY		
Special Statement		
Temporarily Away		

Steps #3 - After providing definitions of your remaining keywords, please send those that you think should be considered for Archdiocesan-wide sharing:

Please send your Excel sheet of Family Keywords to Bryan Gummersall for review. The implementation team will determine which ones can be mapped to Archdiocesan-wide shared fields and which will be setup as unique to your parish in the final database. The implementation team will work with your staff on step #4 as you get closer to your implementation wave.