Families/Households – Family Keywords

Version 10 of PDS

To have a successful migration, it is essential that all keyword lists in PDS are set up 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:

Family Overview Y Primary Information Primary Information Relationships Family Name: Letters, Visits, Etc. Registered: D/Ennary Information Registered: Dividual Letter, Label Be/18/202 Export Family Registered: Individual Letter, Label Street Addr. Reports Street Addr. Oulck Posting Processes Processes Phone Number Exit Program Phone Number Description Unit.	H く・ >	Sacramental Registers Report	s Processes Administration ダ ◎ Both ○ Active	ish Data System - Church Office I Save + Add Family IS Cancel − Pelete Family			
Import Family Reasons for Changes Listing Screen Reports Quick Posting Processes Processes Phone Number Description Uni. * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * <t< td=""><td>Primary Information Relationships Letters, Visits, Etc. Individual Letter, Label</td><td>Family Name: Smith,Joh Registered: 06/18/202 Status: Registered</td><td>n(Susie) 0 Eff Parish:</td><td>······································</td><td>⊠ Envelope User</td><td>□ Parish Life</td><td>□ School Record</td></t<>	Primary Information Relationships Letters, Visits, Etc. Individual Letter, Label	Family Name: Smith,Joh Registered: 06/18/202 Status: Registered	n(Susie) 0 Eff Parish:	······································	⊠ Envelope User	□ Parish Life	□ School Record
Quick Posting Processes Phone Number Description Uni.	Reasons for Changes	Street Addr: 123 Anyw Addr Line 2:	here Lane	Map /Postal: 99999-9999	□ All Addresses Are Unlisted □ Send Mail to		
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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.
- 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 <u>Bryan Gummersall</u> a list of these that you think should be considered for global Archdiocesanwide 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.

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

That will bring up a screen that looks something like this:

Fa	amily Keyword Names (28 Entries)	×
	Description	^
	20 Stewarship of Talent	
	20 Stewarship of Talent TY	
	22 Stewardship	
	22 Stewardship of Talent	
	22 Stewardship of Talent TY	
	23 Stewardship of Talent	
	23 Stewardship of Talent TY	
	baptism	
	credit card interest expressed	
	Daily Mass	
	Filipino Community	
	HISPANIC	~
	Combine Keywords Save/OI	<
	Print Cancel	

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 | 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:

Print to Fil	e	Ĩ
Type:	[Old] - Excel Document View the file Open Folder	
	□ Show advanced dialog	
⊠ Hide Hea	aders and Footers between pages	
Where:	C:\Users\BryanGummersall\FamilyKeywordList.xls	

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:

A		D	U	
Keyword	Definition		Shared or Unique?	-
Do Not Publish Name				
Do Not Publish Name/photo				
Do Not Send Email Statement	5			
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 T	ſ			
Special Statement				
Temporarily Away				

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

Please send your Excel sheet of Family Keywords to <u>Bryan Gummersall</u> 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.