

Members – Member Keywords

Version 10 for PDS

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 member 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 Member Keyword section in the bottom right corner of the Member screen:

The screenshot displays the PDS interface for a member named Anderson, Arthur (Jenny), M/M, ID: 109. The member is currently active and is the head of a household. The 'Member Keyword' section is highlighted with a red box, showing a list of keywords: 'School Computer Lab Volunteer' and 'Bloodmobile Volunteer'. The interface includes a navigation menu on the left, a top toolbar with options like 'Save', 'Add Member', and 'Delete Member', and a main form area with various fields for member information.

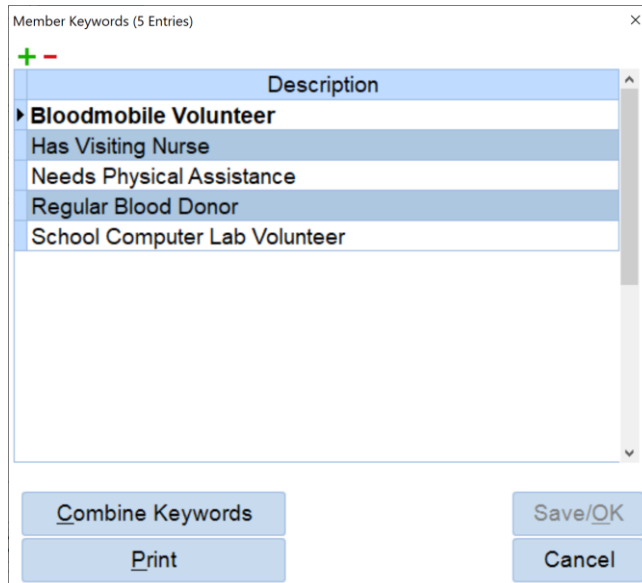
There will be four steps to this cleaning process, prior to migration:

1. Determine which of your Member 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 in the new system. 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 in the new system.

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


Select: FILE | Keywords | Member Keywords | Member 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 Member 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?”

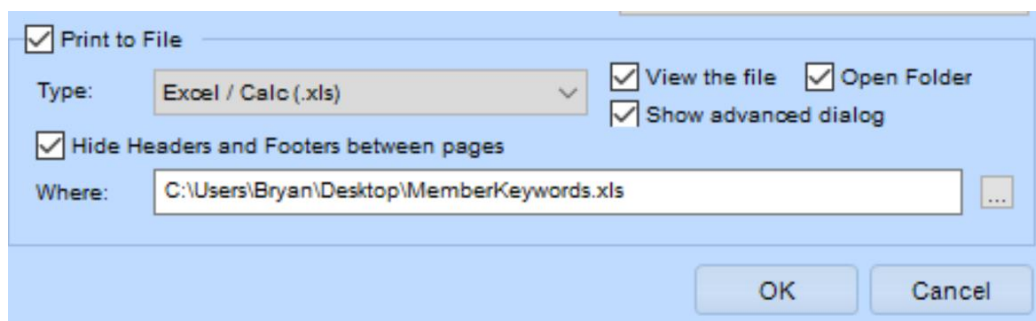
After completing your review process and determining which can be deleted, return to **FILE | Keywords | Member Keywords | Member Keyword Names** and use the  icon to begin the deletion process. Be very careful as this process is irreversible. It would be good to have a current backup done prior to this 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 Member screen where it was present. Again, be very careful!

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

Select: FILE | Keywords | Member Keywords | Member 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 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 Site Specific
Catechist Volunteer		
Talent 2020 Survey		
Volunteer		

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 Member 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 (site specific) 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.