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C O N F E R E N C E

Training Manual

Database Maintenance

Keeping a Clean, Orderly, Database

 **ACSTechnologies.**

Database Maintenance: Keeping a Clean, Orderly Database 3

What is Data Clutter?	3
How Did My Data Get Like This?	5
Procedures for Cleaning Up Your Data	5
Keyword Maintenance	5
Consolidating Fund Transactions	7
Combining Families	9
Sacrament Places Maintenance.....	12
Removing Old Events in Facility Scheduler.....	13
Removing Old Schedules in Ministry Scheduler	14
If Most of Your Data is Old or Outdated.....	15
If Only Some Data is Missing or Outdated.....	16
Keeping Your Data Orderly	17
Adding a New Family.....	17
Adding a New Family when Sharing Data	17
Adding a New Keyword to the List	19
Using Style Guidelines to Minimize Misleading Data	20
Sample Style Guideline	20
Inactive Records in the Office Programs	22
Displaying Inactives in Red.....	22
Do not Display Inactive Records	22
Backing Up Your Data to Keep it Safe	23
Why Worry about Backing Up My Data?	23
How Often Should I Back Up My Data?	23
Automatic Back Ups.....	23
Backing Up Before Restoring.....	23
Class Evaluation	24

Database Maintenance: Keeping a Clean, Orderly Database

Maintaining a clean, orderly database has many benefits. An organized database makes finding the information you need an easy and quick process. It makes your reports and statistics more reliable. It also makes your backup sizes smaller, thus taking up less room on your hard drive. This type of maintenance also ensures that you don't have incorrect, outdated, or misplaced information when printing reports. In this session we will discuss data clutter (where it typically collects and what to do about it), the use of style guidelines, procedures for eliminating old data and consolidating duplicate data, and the communication of a style guide to your office staff. This session covers database maintenance at the program level.

What is Data Clutter?

The term "data clutter" refers to misleading or old data. Misleading data includes inconsistencies, incompleteness, or inaccuracies. Old data typically consists of legacy records. Below is more information about misleading and old data and how it might appear in the Office programs (Church Office, Formation Office, and School Office), Facility Scheduler, Ledger and Ledger/Payroll, and Ministry Scheduler. Some of the examples overlap programs. For instance, an inconsistency of all programs could be addressed using different formats, but for sake of space it is listed once.

Ø **Inconsistencies** – Fields or blocks of data that one user may use for one thing and another user uses for something else. Examples:

ü Office programs

- A member's **Relationship** or **Type** used differently (Head, Adult, etc.)
- User-defined fields with a name that doesn't match the content (a field named **Ethnicity** that tracks a person's religion)
- Addresses that use different formats (Street vs. St., East vs. E., etc.)

ü Facility Scheduler

- Different formatting for event names (Organization abbreviation – Facility abbreviation vs. Full Organization name – Full Facility name)

ü Ledger and Ledger/Payroll

- Using Heading account for some similar accounts, but not for all

ü Ministry Scheduler

- Duplicate ministry names entered to represent the same ministry

Ø **Incompleteness** – Fields that are left blank.

ü Office programs

- Marital status left blank
- Sacraments entered with missing information, such as a date or place
- Missing phone numbers or addresses
- Unrecorded contributions

ü Facility Scheduler

- Organization contacts left blank
- Organization contact's phone, email, or address left blank

ü Ledger and Ledger/Payroll

- Missing accounts

- Missing transactions
- Employee SSN or TIN left blank
- Ü Ministry Scheduler
 - Preferences for serving left blank
 - Missing masses
- Ø **Inaccuracies** – Information that is entered incorrectly or is outdated.
 - Ü Office programs
 - Children listed as adults
 - Outdated information regarding a member's grade or highest degree obtained
 - Contributions recorded for the wrong amount
 - Incorrect contact information (addresses, phones, or email)
 - Ü Facility Scheduler
 - Events scheduled on the wrong day or time
 - Holidays entered on the wrong day (Easter Sunday entered as falling on a Saturday)
 - Facility capacities over stated
 - Ü Ledger and Ledger/Payroll
 - Wrong number listed for an emergency contact
 - Evaluation entered on the wrong employee record
 - A priest with a filing status of married
 - Ü Ministry Scheduler
 - Availability entered incorrectly
 - Masses entered for wrong day
 - Serving preferences entered incorrectly

While some of these are not a big deal, others are very costly. Correcting misleading data is beneficial to you when running reports. After all, why enter the information at all if you cannot get it back out in a meaningful and accurate way?

Another type of data clutter is old data. Old data consists of legacy records that no one wants to remove because someone else might be using it. You see this often with report selections. A selection is saved, run once, and then never used again. Or, a previous employee may have set up selections that no one else uses because they have their own selections that they prefer to use. While old data can skew counts in reports, it is usually not as detrimental as misleading data. However, old data clutters your system and the program you are using would be easier and faster to navigate if you cleaned up the old data.

How Did My Data Get Like This?

Take a look at your data. Chances are there are signs of data clutter.

So, what happened? How did this possibly happen to you? Don't worry, it happens to everyone. It's a normal side effect of keeping databases. The following factors cause data clutter:

- **Multiple Operators:** When more than one person maintains a database, it's normal that variations in style will create inconsistencies in your data.
- **A New Operator Takes Over:** Even if you have a single person maintaining your data, unless they start with an empty data file, their style of entry is likely to be different from the last operator.
- **Passing Time:** As time passes, terminology changes. Remarks and phrases that were entered five years ago are different than those entered today.

The truth is this is a normal consequence of keeping a database. Instead of lamenting your fate, learn to minimize the problem, and use regular maintenance to alleviate it.

Procedures for Cleaning Up Your Data

There are simple procedures you should use periodically to clean up your data. How often you perform this cleanup depends on the time you have available to do so. The more frequently you perform your cleanup, the easier the cleanup will be.

Keyword Maintenance

Below is a sample of a typical City/State Keyword list:



Fig. 1

Notice that there are two keywords that mean the same thing: **Phoenix, AZ** and **Phoenix,AZ**. There is also a misspelling: **Paradise Valey, AZ**.

Correcting a Misspelling in a Keyword List

If you see that a keyword is misspelled, don't add a new keyword with the correct spelling. If you do that, you will have two keywords that mean the same thing. Instead, display your keyword list, edit the misspelled keyword, and change it to the correct spelling. Changing the spelling in the list corrects the spelling throughout the program.

Combining Keywords that Mean the Same Thing

If you find that there are two keywords in the list that mean the same thing, use the **Combine** button to correct the problem. When you click **Combine**, a dialog box similar to the one below displays:

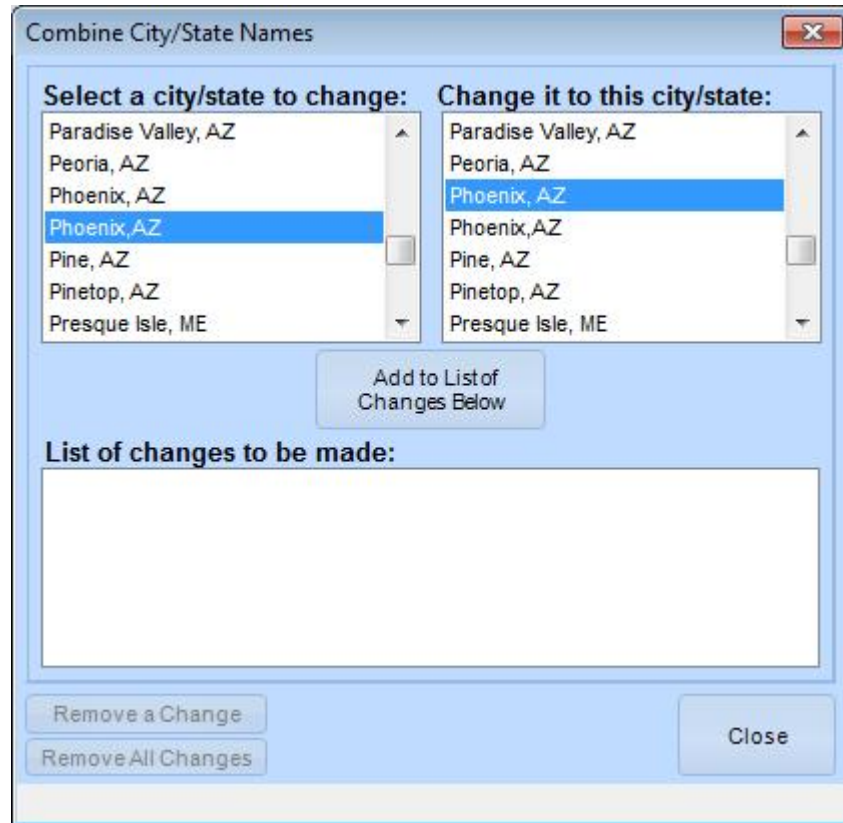


Fig. 2

Scroll down in both lists until you see the two keywords you want to combine. In this example, it is **Phoenix, AZ** and **Phoenix,AZ**. Combining two keywords removes one of the values and keeps the other value, so you must decide which keyword has the better format. In this case, let's eliminate **Phoenix,AZ** (without the space) and keep **Phoenix, AZ**.

In the left column, select the keyword you want to eliminate, then in the right column, select the keyword you want to keep. Click **Add to List of Changes Below**.

Periodically examine all of your keyword lists and look for misspellings and duplicate keywords.

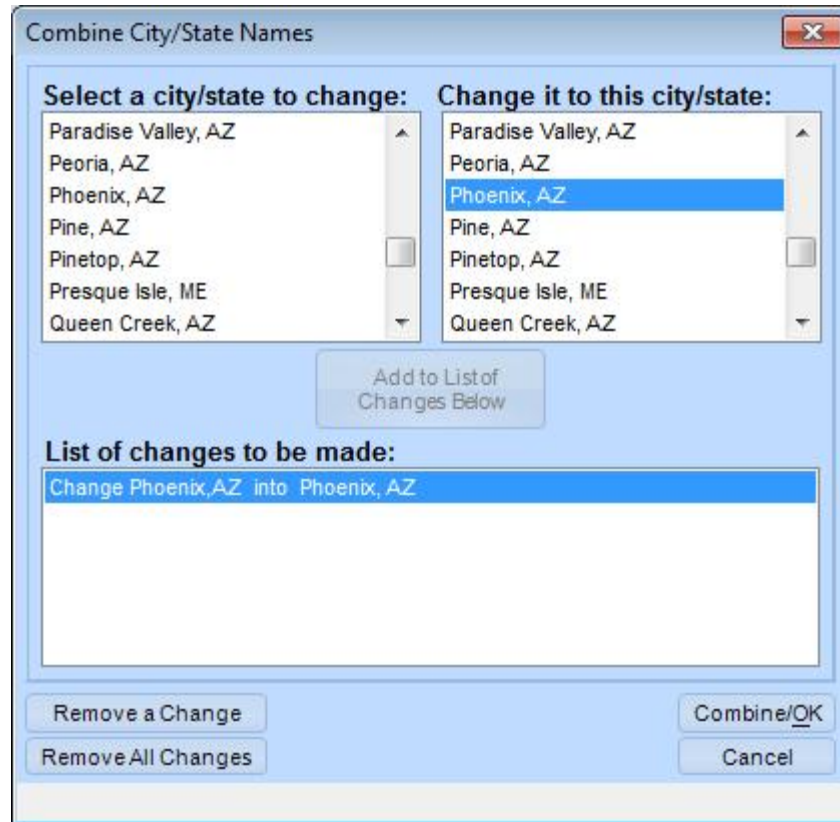


Fig. 3

You can combine several keywords at once. In the left column, select a keyword that you want to change and in the right column, select the keyword you want to keep, then click **Add to List of Changes Below**. Repeat this step until all of the keywords you want to change display in the list of changes. This cuts down on processing time since the program processes the data once for all keywords you want to combine, rather than one time for each (which would be the case if you ran this process over and over, selecting a single pair each time).

Click **Combine/OK** to process the changes. The program processes through all of your data looking for the old keyword, **Phoenix, AZ**. When an instance is found, the program automatically changes it to the keyword you chose to keep, **Phoenix, AZ**. When the process is complete, the program removes the old keyword from your keyword list.

Consolidating Fund Transactions

How far back do you save financial transactions? Do you have financial information in your Office program that goes back as far as 2005? 2000? 1995? Or before? Just how long should you keep your financial history?

It is your decision how long you keep financial history in your database. Three to five years is common. Some parishes keep all financial transaction history for seven years. But what use do you have for financial information older than that? If you have fund information from 2000 or before, do you ever use it? If so, then keep it. But if you don't use that information, get rid of it.

Removing old financial transactions greatly increases speed performance when running financial reports, so get rid of old data you don't need.

What if you don't think you need it but don't want to remove it completely? We suggest that if you retain old financial information, you consolidate the detailed transactions into

monthly, quarterly or, yearly totals. This retains all your totals for reports and statistics without taking the space for each individual transaction.

For maintenance on your fund, go to the Fund Setup window. In the upper right corner, you can see how far back your data goes.

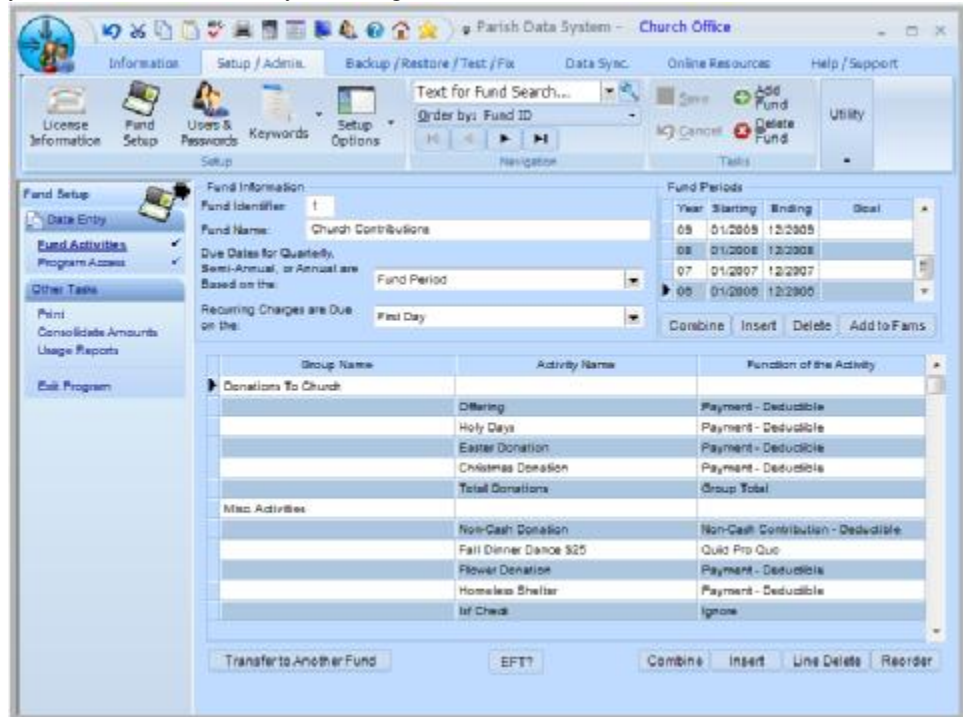


Fig. 4

When you consolidate amounts, transactions in the family's fund history window are combined into monthly, quarterly, or yearly totals.

In the left navigation menu, click **Consolidate Amounts**.

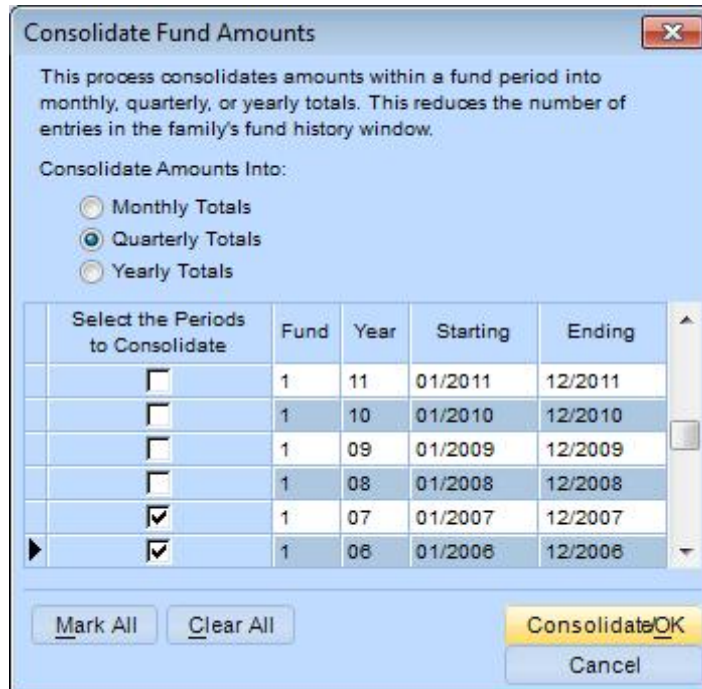


Fig. 5

You can consolidate into monthly, quarterly, or yearly totals (one total for each month, quarter, or year). Select the old period or periods for which you want to consolidate amounts, then click **Consolidate/OK**. The program processes through your data and calculates those totals, then removes the old, unnecessary transactions.

Combining Families

Do you have duplicate families in your data? If two users add the same family, you end up with duplicates. Sometimes you can simply delete one or the other. However, if the duplication was not discovered right away, it is possible that important information was added to both family records.

When this happens, use the Combine Families process to identify and combine duplicate records.

First, you can decide how to find possible duplicate families. Select an option, then click **Build List**. This takes a few minutes to complete.

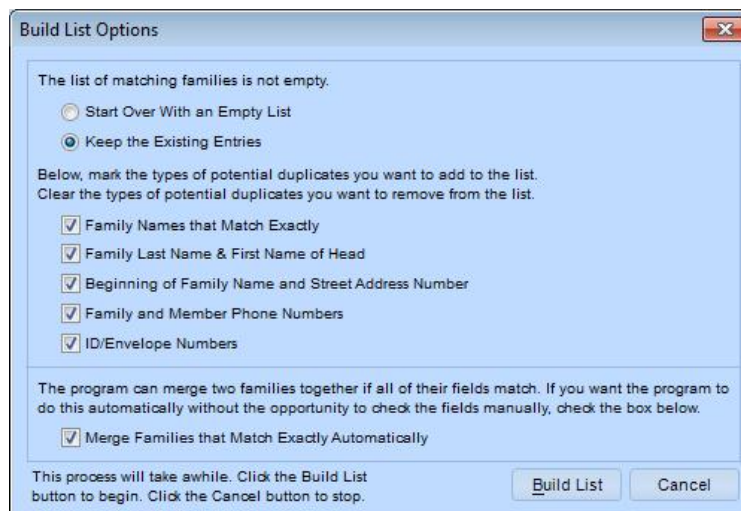


Fig. 6

A list of possible duplicates displays. Review the list and select the ones you want to examine further. Click **Review Details Before Combining Families**.



Fig. 7

The program displays the information from one record on the left and the other on the right. Discrepancies display in red. Select the information you want to keep from each record.



Fig. 8

After you have addressed all discrepancies, click **Combine Families**. This pulls all of the information you chose to keep into a single record and deletes the other family record. This includes all fund information assigned to both families. However, you must also reconcile the members of those duplicate families.

Important: When the following message displays, click Yes.

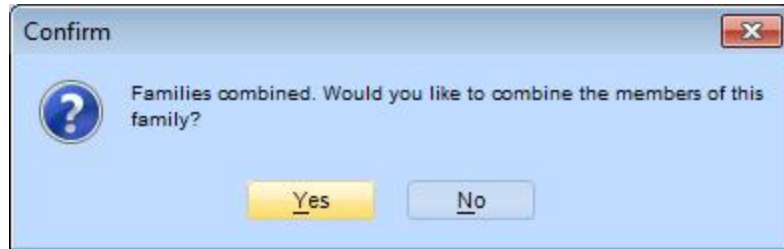


Fig. 9

The process then allows you to review and combine all members in the families.

The list of members displays, along with suggestions for what actions to take. In the example below, the suggestion is to combine **Schmidt,Lenore,Mrs.** from one family with **Schmidt,Lenore{R}[Duarte]** in the other program. Select that line, then click **Review Details Before Combining Members.**

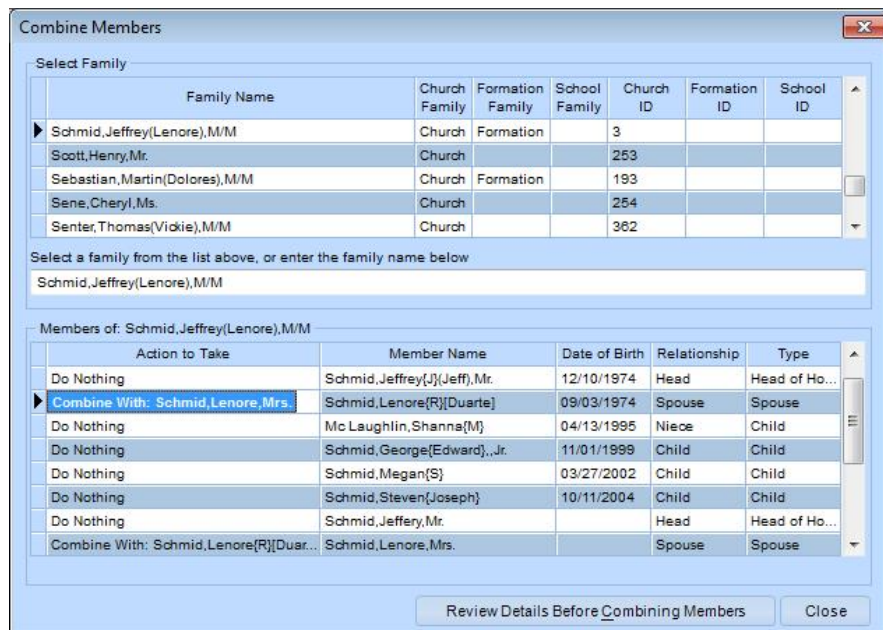


Fig. 10

Once again, the program displays the detail for both member records. Differences display in red. Select the information you want to keep.

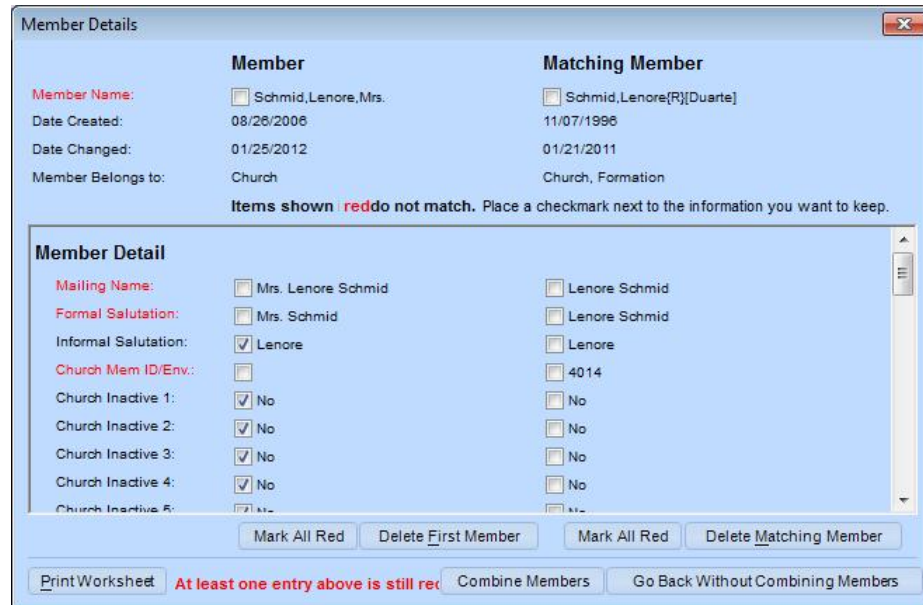


Fig. 11

Click **Combine Members**. This combines the member, removes the duplicate record, and returns to the list of members so you can combine any additional duplicates within the family.

Sacrament Places Maintenance

If you keep sacramental information, either in the member's sacrament windows or in the sacramental registers, the list of sacrament places can get clogged with duplicate records.

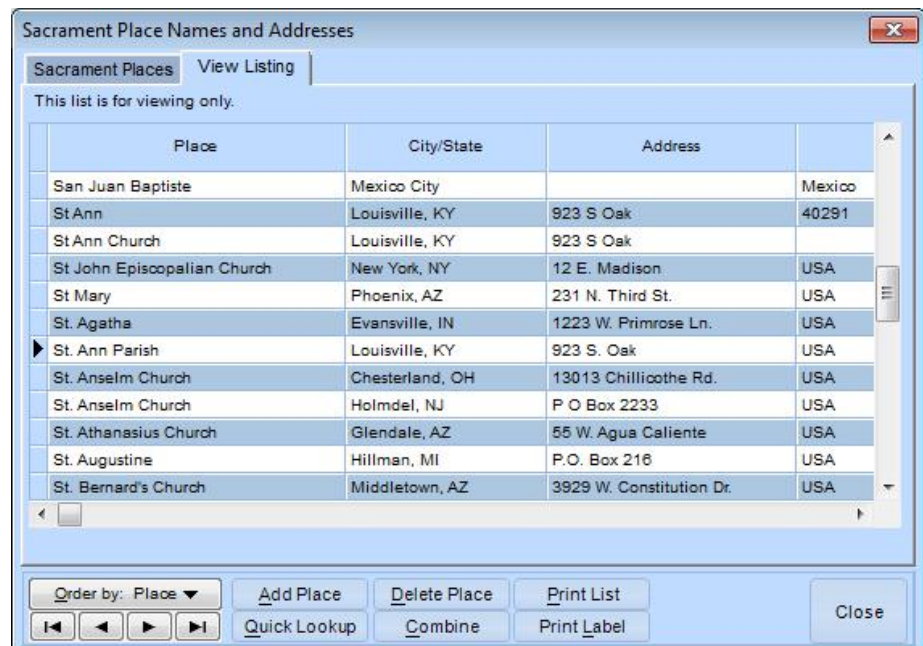


Fig. 12

In the Sacrament Place Names and Addresses window, use the Combine process to combine duplicate sacrament places.

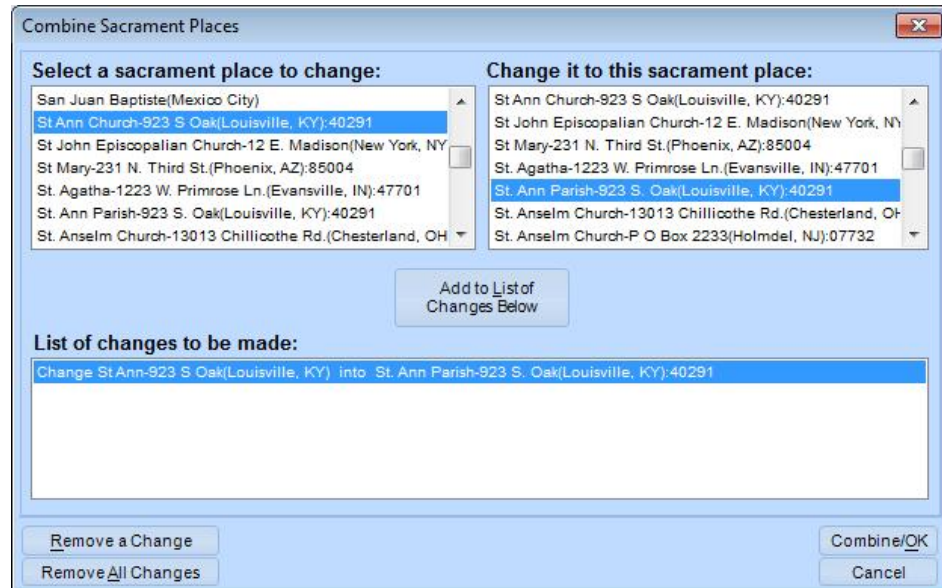


Fig. 13

Once again, select the sacrament place on the left you want to replace and the sacrament place on the right you want to keep, then click **Add to List of Changes Below**. When you have all of the changes you want to process in the list, click **Combine/OK**. The program processes through your sacrament records, replaces the values with those sacrament names you want to keep, then removes the duplicate names from the list.

Removing Old Events in Facility Scheduler

Retaining past events in your Facility Scheduler program slows down the scheduling process. We recommend removing old events you no longer need at least once a year. This is easy and automatic. Determine how far back you can remove events, then use the Delete Events process.



Fig. 14

To remove old events, select a date range. At the bottom of the window, select whether to remove charge and payment information and specify what to do with events where charges have not been paid.

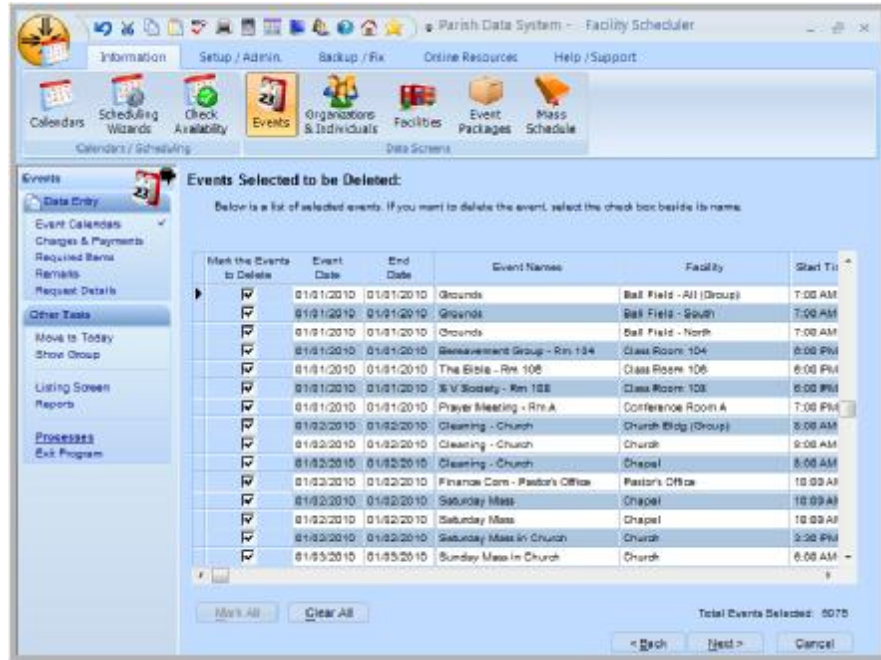


Fig. 15

Click **Mark All** to select all events, then clear the check box next to Any events you do not want to delete.

Removing Old Schedules in Ministry Scheduler

Retaining past schedules in your Ministry Scheduler program slows down the scheduling process. We recommend removing old schedules you no longer need at least once a year. This is easy and automatic.

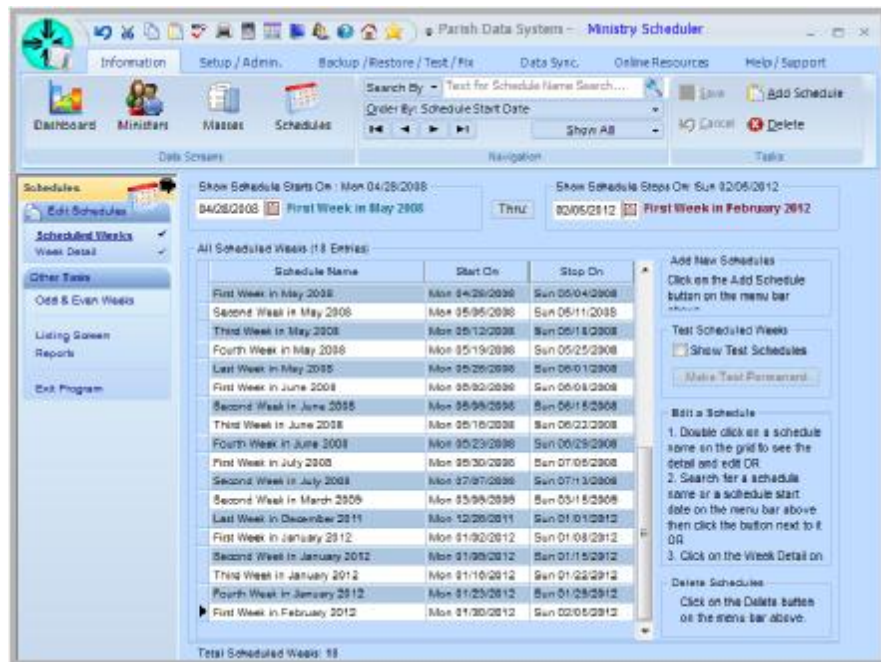


Fig. 16

In the Schedules window, click **Delete** in the upper right corner to display the list of schedules. Select the ones you want to delete, then click **Delete/OK**.



Fig. 17

If Most of Your Data is Old or Outdated

If most of your data is old or outdated, you may want to perform a census. *Consider using the Family Census Letter under Family reports* to send a letter to every family in your database showing them the data you have for them and asking that they update their data for the church records.

For those families attending church at your parish who are not registered, *use the Family Blank Registration form to print blank census forms* that you can pass out during Mass. Or *use the Online Registration form* on your website and ask that they go online to register as a parishioner.

If you *use the PDS Connects program*, you can ask your registered families to log on and update their information online.

From the pulpit let your families know about your census efforts. Tell them they will receive a letter and ask them to update their information and bring it back, or ask them to log online to view and update their information using PDS Connects. Ask those who have not yet registered to pick up a blank form and fill it in or go to your website and register with your church.

Then go to your PDS data and “mark” everyone as needing to be updated. You can do this in a number of ways. One easy way is to mark everyone inactive. Use the Activate/Inactivate Families process to mark everyone at once. Or, use the Quick Posting Process for Family Keywords to give all families a keyword like “No Census Received.”

As you receive accurate census information from your families and enter these changes (or verify the existing data) in the PDS program, mark that family active again, or remove the special keyword. This helps you find those families who have not yet updated their data. Keep in mind that among that group are those families who have moved away without notifying you.

**If Only Some
Data is
Missing or
Outdated**

If most of your data is current, but you find that there are some fields that you want to track (birth date, occupation, language, email addresses, etc.) that have never been tracked before, then your efforts can be on a more limited scale. You can create simple post cards or letters asking for just the limited information that is missing. As information comes back to the parish, enter it for the appropriate families and members. Since the information is already blank, you don't have to worry about old or outdated information, that is, until this most current data gets old and outdated.

Keeping Your Data Orderly

Once you have cleaned up your data, how can you keep it as orderly as possible?

Adding a New Family

Before you add a family to an Office program, search for the name to make sure it has not already been added. Using the Navigation tools in the Families window, enter the last name of the family you are adding (highlighted in red below). If the family is not found, use the drop-down list to check for common misspellings of the last name. An example is Mac Arthur, which is spelled MacArthur, McArthur, Mc Arthur, Mac Arther, etc. You can also use the Listing Screen to see if they are already in the list. To view this list, in the left navigation pane, under **Other Tasks**, click **Listing Screen**.

If the family has not been added to the data, click **Add Family** (circled in green). Minimally, you should enter the **Family Name** and at least one method of contact (address, phone, or email) so you can get any missing information. Preferably, fill in as much information as possible. When you enter the **Family Name** make sure you select **Automatically Add this Member**. It saves a step in the end. Once you have entered all of the information, click **Save** and move on to filling in the member information.

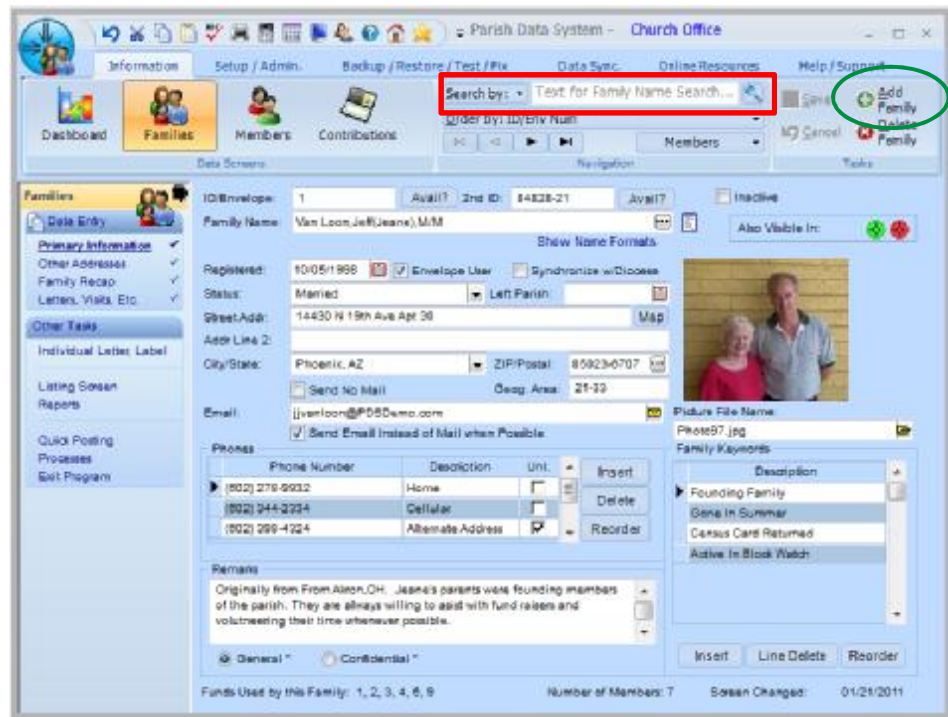


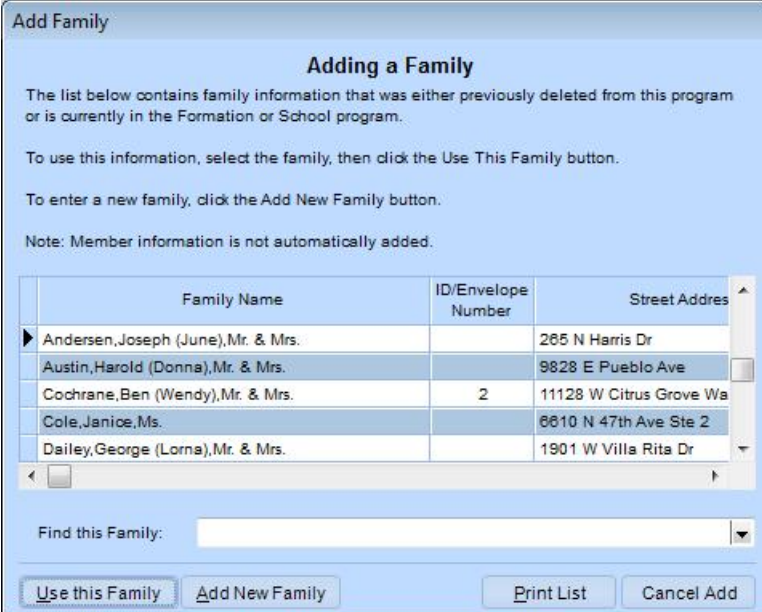
Fig. 18

Adding a New Family when Sharing Data

It is common to find that duplicate records were created in databases that are shared between two or more Office programs. Learning the correct way to add a family cuts down on this problem. Follow the steps described above. Search for the family name and use the drop-down list to look for different spellings of the name.

If you don't find the family using the Navigation tools, the family is not visible to your program. However, that doesn't mean the family is not in the database. Next, check to see if the family is in the database, maybe in a different Office program, but is not yet visible in your program.

Click **Add Family**. If data is shared between programs, a list displays showing all of the families that are in the database but are not yet visible to your program.



The screenshot shows a window titled "Add Family" with a sub-header "Adding a Family". Below the header, there is explanatory text and instructions. A table lists several families with columns for Family Name, ID/Envelope Number, and Street Address. The "Find this Family:" field is empty. Buttons for "Use this Family", "Add New Family", "Print List", and "Cancel Add" are at the bottom.

Family Name	ID/Envelope Number	Street Address
Andersen, Joseph (June), Mr. & Mrs.		265 N Harris Dr
Austin, Harold (Donna), Mr. & Mrs.		9828 E Pueblo Ave
Cochrane, Ben (Wendy), Mr. & Mrs.	2	11128 W Citrus Grove Wa
Cole, Janice, Ms.		6610 N 47th Ave Ste 2
Dailey, George (Lorna), Mr. & Mrs.		1901 W Villa Rita Dr

Fig. 19

Scroll through the list to look for the family you want to add, or type the first few letters of the family name in the **Find this Family** field to move to that part of the list.



This screenshot is similar to the previous one, but the "Find this Family:" field now contains the text "Sanchez, José (Rosa), S/S". The list below is filtered to show only the family matching the search criteria.

Family Name	ID/Envelope Number	Street Address
Pace, Wilson (Audra), Mr. & Mrs.		4410 N Longview Ave Ap
Reynolds, Cole (Irene), Mr. & Mrs.		1835 E Ranch Rd
Sanchez, José (Rosa), S/S		11821 E Ironwood Dr
Sawyer, Max (Cindy), Mr. & Mrs.		4902 E Thomas Rd Apt 1
Shaffer, Alice, Ms.		4648 E Palo Brea Ln

Fig. 19

If you do not find the family in the list, click **Add New Family** and the cursor returns to the Families window where you can enter all new data.

If you find the family in the list, click **Use This Family** and the program automatically makes that family visible in your program. It then asks if you want to make some or all of the members in the family visible in your program.

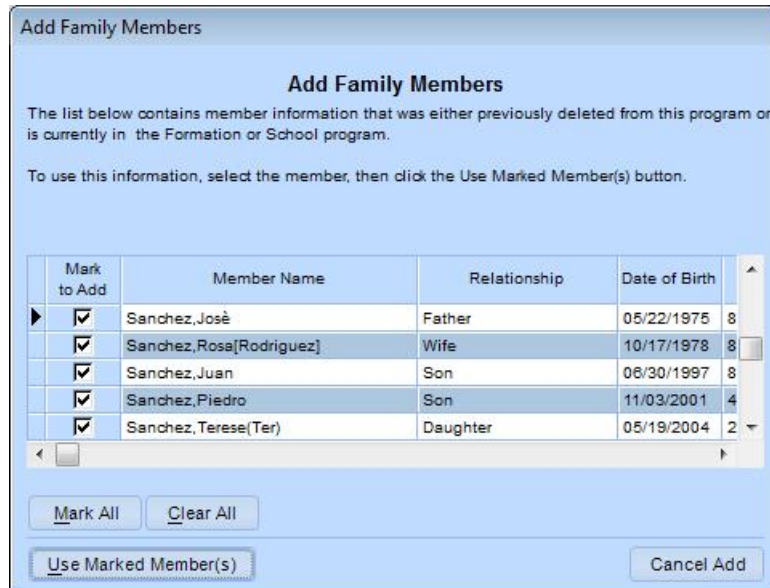


Fig. 20

Select the members you want to see in your program and click **Use Marked Members**.

Note: When you add a family from the shared program list, all fund information visible to your program is automatically added at that time.

Adding a New Keyword to the List

Creating duplicate keywords is common. When you are in a keyword field, if the Not in the List dialog box displays (see below), make sure you have spelled the keyword correctly before adding it to the list.

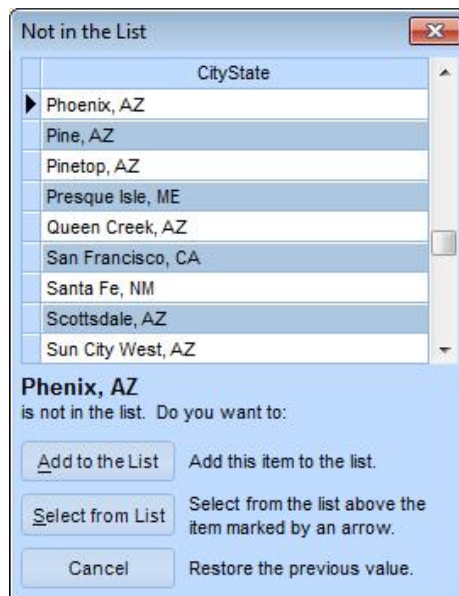


Fig. 21

If you see the correct keyword in the list, select it and click **Select from List**. Making sure the keyword is not already in the list saves you clean up time later on.

Using Style Guidelines to Minimize Misleading Data

A style guideline is a system you can implement to reduce misleading data. A style guideline does not necessarily need to be in writing, but all users who have access to add or change information in the program should use it. Here are some questions you should address when coming up with a style guideline for your facility:

What status should be used for new families?

Who is considered head of household?

What relationship should be assigned to members?

What abbreviation style should be used, if any? (Open, with periods, or closed, without periods)

- First or 1st
- Street, St, or St.
- North, N, or N.
- Mr or Mr.

What descriptions will be used for phones/emails?

- Work, business, or office
- Cell or mobile

What fields must be completed (including keywords)?

What information needs to be updated when someone becomes inactive?

What information needs to be updated when someone dies?

What information needs to be updated when there is a marriage?

What information needs to be updated when there is a divorce?

When should old information be deleted?

How should Event names be formatted?

Are you going to use Cash or Accrual basis?

Should you use master and sub accounts?

How much information on ministers is enough before you can start scheduling them?

Sample Style Guideline

The following is a sample style guideline. This example is very simple. You may find that your style guideline is several pages long. It is a good idea to put your style guidelines in small binders. Give one to each employee who enters or changes data on your computer. Include other pages for important processes like Quick Posting of Payments, New Year Fund Setup, and Grade Promotion.

Guidelines for Adding New Families

- Use the Search field to search for the family name.
- If the name is not found, use the drop-down list in the Search field to look for alternate spellings.
- If the name is found, **do not add a new family**. Display the existing family and make any necessary changes.
- If the name is not found, click **Add Family**.
- Look in the list of existing shared families for the family.
- If the name is found, click **Use this Family** and enter any appropriate members from the list.
- If the name is not found, click **Add New Family**.

Guidelines for Entering ID Numbers

- Active families must have an ID number in the range 1 – 5000.
- Guest families that contribute should have an ID number in the range 5000 – 6000.
- Guest families that do not contribute should have an ID number in the range 6000 – 7000.

Note: These values are just examples. You can use whatever is appropriate at your parish.

Guidelines for Entering Family Names

- Families that represent married couples should use Mr. and Mrs. (not M/M).
- Use the member's full first names for the formal salutation.
- Use any nicknames the members have for the informal salutation.
- Family names for widows may be entered as Smith,June,Ms. or Smith,Robert(June),Mr. & Mrs. at the discretion of the widow.

Guidelines for When a the Head of Household Dies

- In the Members window, enter the date the member died in the **Deceased** field.
- Do you want to mark this member as inactive/deceased? **Yes**.
- Would you like to add an entry of **Deceased** to the Sacrament List? **Yes**.
- In the spouse's record, change the type to **Head**.
- Check with the Widow/Widower to see what form of address they prefer on family correspondence. Change the family name accordingly.

Inactive Records in the Office Programs

One of the most annoying things that can clog up your data is inactive records. Some databases have more inactive records than active records. What is the purpose of that?

What do you use inactive records for? How long do you keep inactive records before deleting them? These questions differ from parish to parish. You must decide what is appropriate for your situation. However, remember that in the Office programs there are two ways to handle inactive records.

Displaying Inactives in Red

The most common method for marking records inactive is to use the **Inactive** check box in the Families and Members windows. This retains the family or member in your visible database and makes those records available to include in reports. You must select the appropriate check box when you run reports to print inactive records.

Use this method when you need to keep financial or other pertinent information about those families.

Do not Display Inactive Records

An alternate method for handling inactive records is to keep them in your database, but don't make them visible. This method is advantageous because the information is still available if the family returns to the parish, but it is not in the way when viewing active information.

To keep inactive records and not show them in the program, mark them as inactive, then click **Delete**. Note: If you share data, and this record is visible in another program, no message displays. In this case, the record is still in your database, but not visible to you.

If the record is not in use by any other Office program, the following message displays:

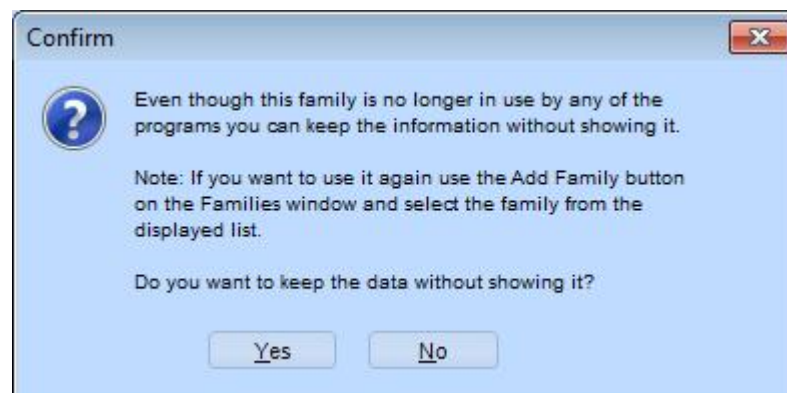


Fig. 22

Click **Yes** to keep the record in your database. If you need to access it in the future, click **Add Family** in the Families window.

Note: You cannot print records that you have hidden in this manner on reports.

Backing Up Your Data to Keep it Safe

Having a backup is like having a safety net. Natural disasters such as floods, electrical storms, tornados, extreme heat or cold, as well as human interaction such as a spilled drink, formatting the hard drive, viruses, fires, and even theft can all wipe out a system. Backups also provide a way to access information that has been deleted from the system. This also means you can “roll back” a change you have made. If, for example, you run the New Year Fund Setup process, and then decide you should have made different option choices, you can return to the backup you made prior to the process and do it all over again.

Why Worry about Backing Up My Data?

If you’re asking this question, then you probably have never experienced a catastrophic event on your computer. However, we have talked to enough people to know it is very common. The following are common causes for people to restore backups:

- ü Power failure or power surges that cause hard drive crashes
- ü Hardware failure of a computer or server
- ü Theft of your computer equipment
- ü Fire
- ü Natural disasters such as floods, hurricanes, tornados, etc.

How Often Should I Back Up My Data?

How often you back up your data depends on a number of things:

- ü Office procedures
- ü Available time
- ü Available hard disk space
- ü Amount of changes you have made since the last backup

The most important thing is to create a backup schedule and stick to it. That takes care of most situations. However, there are times where backing up **more** than once a day is appropriate. If you are working with school or religious education families and are registering students, you may want to back up at lunch, in case something should happen. Or, if you are entering pledge information, you may want to periodically stop and make a backup. Consider how much work you would have to do in order to revert to your last backup. If it is a considerable amount, then you should perform a backup.

Automatic Back Ups

Backing up your data when you start the program every morning is not enough. Automatic backups are stored either on your local computer or your server. What would happen to your data if there was a natural disaster?

It is very important to periodically take one of your backups off site. This means that you have to back up to a removable media such as a floppy disk, CD, thumb drive, or tape. If your network administrator periodically backs up the server to a tape, make sure you store one off site every month or so. You can put it in a safe deposit box at the bank or take it home and put it on your bookshelf. Next month, bring it back and take a new one home.

Backing Up Before Restoring

It is a good idea to make a backup of your data before you restore an older backup. That sounds strange, but it is a precaution that can save you time. Imagine what could happen if the backup you are restoring is damaged! Making a final backup before you restore will put your mind at ease.

Class Evaluation

Got a comment about this session or anything convention related? Stop by the Resource Area to fill out a brief online survey.