

Keywords

WHY DO WE USE KEYWORDS?

Keywords are used to provide information about a family or individual for reporting purposes. They are maintained in a list 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 fields within Church Office. These generally fall into the categories listed below:

Program Area	Keyword Tables
<i>General Keywords</i>	<ul style="list-style-type: none"> • Background Checks • City/State Names • Email Descriptions • Ethnicity Names • Grades and Degrees • Language Names • Letter Types • Marital Status Names • Mass Names • Phone Descriptions • Relationship Names • Requirement Descriptions
<i>Family/Fund Keywords</i>	<ul style="list-style-type: none"> • Family Keyword Names • Family Status Names • Fund Keywords
<i>Member Keywords</i>	<ul style="list-style-type: none"> • Attendance for Names • Attendance Reasons • Celebrant Names • Member Keywords • Ministry Names • Sacrament Date Names • Sponsor/Witness Types • Talent/Ministry Status Names • Talent Names • User Defined Fields 1 thru 11 (These are typically used for Religion, Disability, Occupation with the ability to add other user definite keywords to the list)
<i>Personnel Keywords</i>	<ul style="list-style-type: none"> • Achievement Type • Clergy Keywords • Department Types • Education Types • Personnel Keywords • Personnel Types • Positions

Keyword Maintenance Best Practices

The main database administrator should periodically review all the fields in Church Office that are keyword fields. These lists are critical to consistent reporting and to maintaining the integrity of the database. The administrator should look for duplicates, correct typographical errors and remove keyword values that are no longer in use.

This example will work thru the process of cleaning up several keyword lists. The techniques shown will work on all the keyword fields mentioned on the previous page:

City/State Names

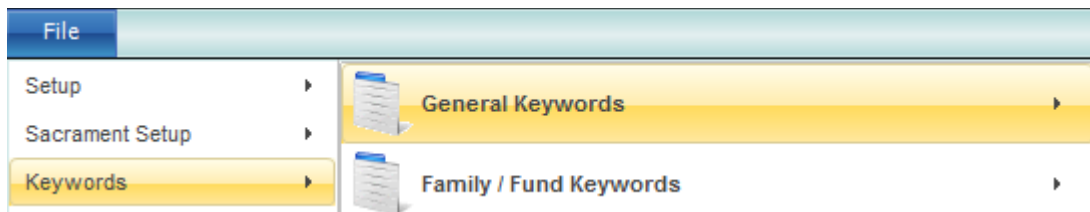
Phone Descriptions

Occupation List

City/State Names

One of the keyword lists that can have the most issues is the list of cities, so we'll start with that one.

Select: FILE | Keywords | General Keywords | City/State Names



The City/State Keyword List will look something like this when it is selected:

City/State Names (334 Entries) X

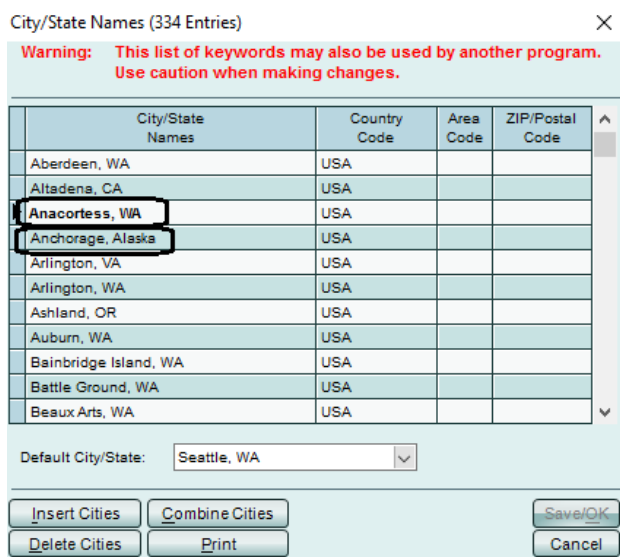
Warning: This list of keywords may also be used by another program. Use caution when making changes.

City/State Names	Country Code	Area Code	ZIP/Postal Code
Aberdeen, WA	USA		
Altadena, CA	USA		
Anacortess, WA	USA		
▶ Anchorage, Alaska	USA		
Arlington, VA	USA		
Arlington, WA	USA		
Ashland, OR	USA		
Auburn, WA	USA		
Bainbridge Island, WA	USA		
Battle Ground, WA	USA		
Beaux Arts, WA	USA		

Default City/State: Seattle, WA

Insert Cities Combine Cities Save/OK
Delete Cities Print Cancel

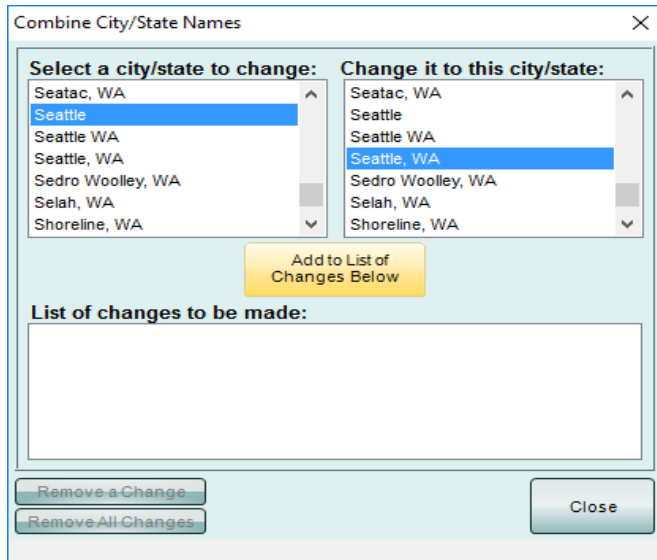
Our first step will be to clean up some typographical errors on the City/State list. As you can see, 'Anacortes, WA' has been misspelled 'Anacortess, WA' and 'Anchorage, Alaska' should read 'Anchorage, AK'.

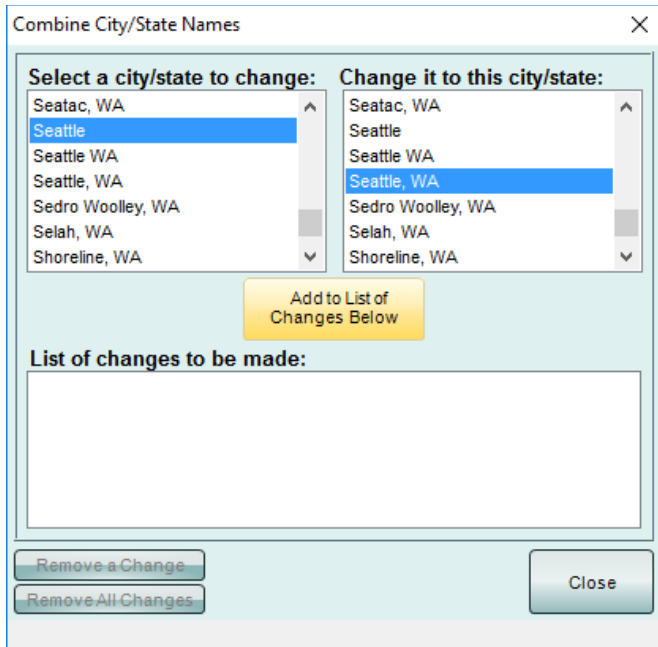


To fix these, we simply place our cursor on those lines and make the edits. Once we click SAVE/OK, all families that had them will have the corrected entry, which would then look like this:

Anacortes, WA	USA
Anchorage, AK	USA
Altadena, WA	USA

The next issue that occurs regularly is that duplicate cities are created by accident. In our sample database, Seattle has been entered four different ways:

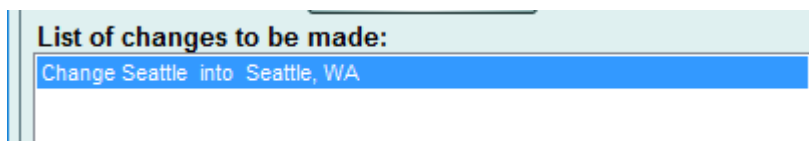




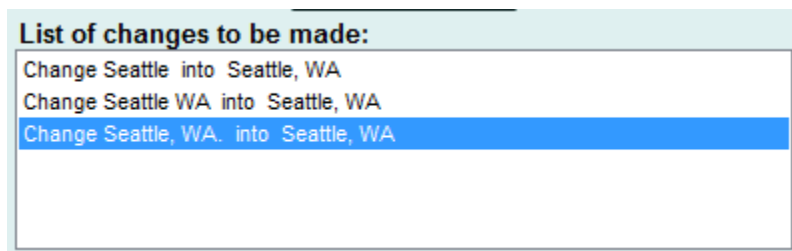
To resolve this, we will use the COMBINE CITIES button. We want to use the COMBINE process instead of the Delete Cities process, so that we can correct those families that have the wrong city value on their screen. If we just delete the city from the list, we'll end up with families that just have a blank city/state. Using the COMBINE process, we can replace the incorrectly created city/state names with the proper city/state name without losing any information. For our example, we will combine 'Seattle' and 'Seattle WA' into 'Seattle, WA'. To do this, press the COMBINE CITIES button and the following screen will come up:

We will select 'Seattle' from the left side of the window and then select 'Seattle, WA' on the right side of the window and then click Add to List of Changes Below button.

That will add that change to the List of Changes to be Made portion of the window:



We'll continue by selecting 'Seattle WA' (without the comma) from the left side of the window and then selecting 'Seattle, WA' from the right side and selecting 'Seattle, WA.' from the left side of the window and then we will click Add to the List of Changes again. This will result in three changes being ready:

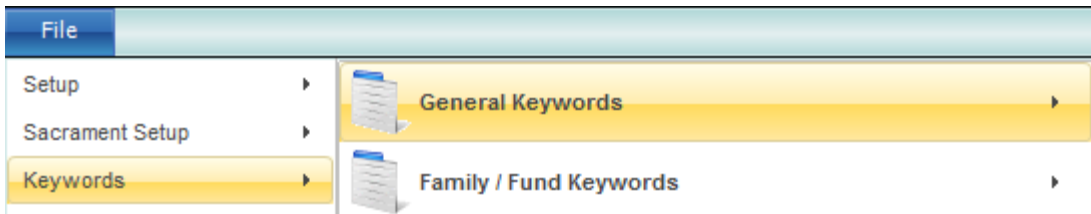


After you have all your changes selected, click the Combine/OK button and the program will make the changes you've requested. There is no UNDO button during this process. Once you've pressed Combine/OK, there is no going back, so be careful of your selections.

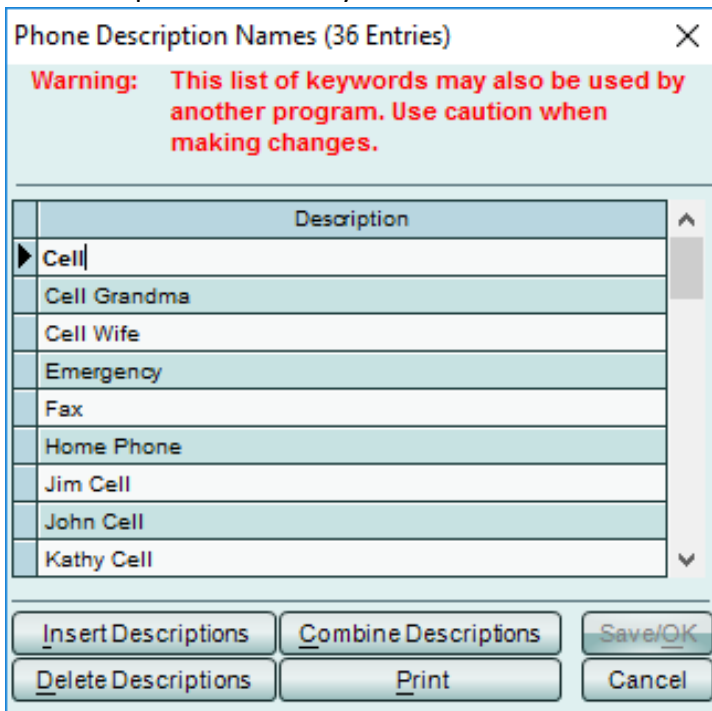
Phone Description Names

Another one of the keyword lists that can have the most issues is the list of phone descriptions, so we'll continue with that one.

Select: FILE | Keywords | General Keywords | Phone Description Names



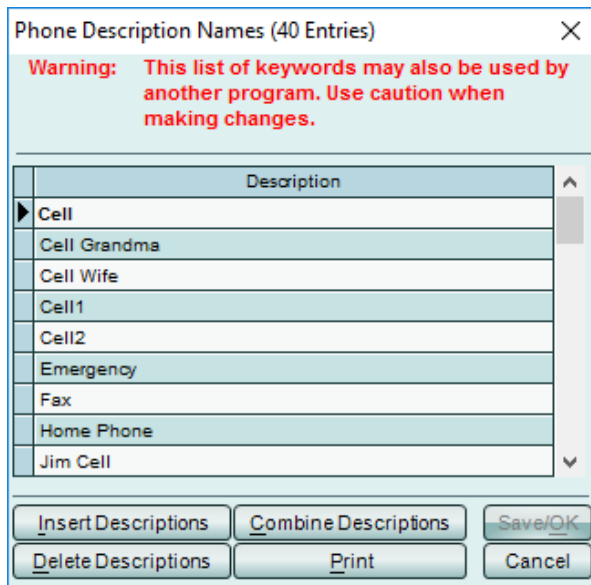
The Phone Description Names Keyword List will look something like this when it is selected:



Our first step will be to insert some descriptors that are more generic and will be more useful when running reports. Our suggestion is to place member specific phone numbers on the COMMUNICATIONS screen for each member.

We also suggest more generic descriptors for those numbers that you want to display on the family screen. In our situation, we have already inserted descriptions to add 'Cell1', 'Cell2', 'Work1', 'Work2' for the cell and work numbers for member 1 and member 2 (the head of household members).

A revised list might look like this to start:



Once we have inserted the new descriptors, we will use the COMBINE DESCRIPTIONS process to move descriptions that are personal to the more generic ones. We want to use the COMBINE process instead of the Delete Descriptions process, so that we can correct those families that have the wrong value on their screen. If we just delete the phone description from the list, we'll end up with families that just have a blank phone description. Using the COMBINE process, we can replace the typo with the proper city name without losing any information.

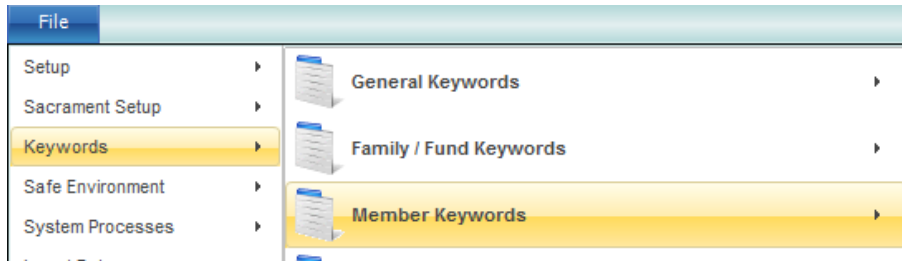
For our example, we will combine all items that include the work 'cell' into either 'Cell1' or 'Cell2'. We will also combine all that include 'work' into either 'Work1' or 'Work2'.

Note: screen captures of this process are like those in the City/State cleanup section, so they have not been included to save paper and printing costs.

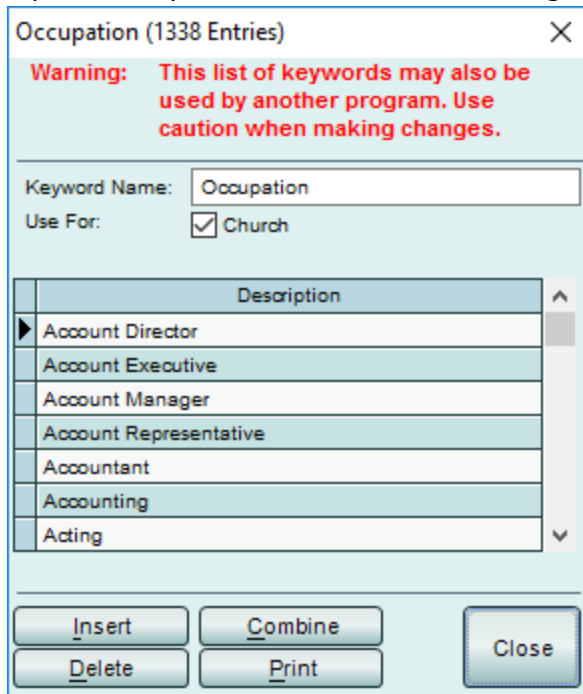
Occupation Names

Another one of the keyword lists that can have the most issues is the list of occupations, so we'll continue with that one.

Select: FILE | Keywords | Member Keywords | User Keywords | Occupations



The Occupations Keyword List will look something like this when it is selected:



Our first step would be to print this list out. That will allow you to make some notes on duplicate descriptors and possible deciding to insert more generic descriptions. Once we have inserted any new descriptors, we will use the COMBINE DESCRIPTORS process to remove descriptions overly specific or duplicated to the more generic ones. We want to use the COMBINE process instead of the Delete Descriptions process, so that we can correct those members that have the wrong value on their screen. If we just delete the occupation descriptions from the list, we'll end up with members that just have a blank occupations.

Note: screen captures of this process are like those in the City/State cleanup section, so they have not been included to save paper and printing costs

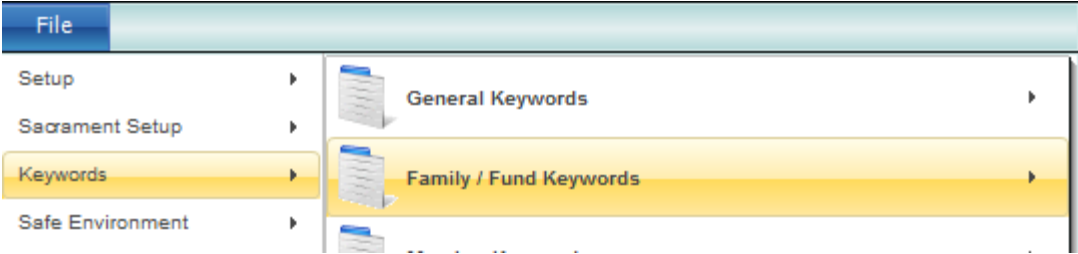
Family Status Keyword Field – Best Use

Since the introduction of the Church Office program, most Churches have used the Family Status Field to track MARITAL STATUS. Recently, many Churches have found that it can be useful to repurpose that field to track how a family ‘fits’ into the Parish. We recommend changing the use of the Family Status field for this purpose.

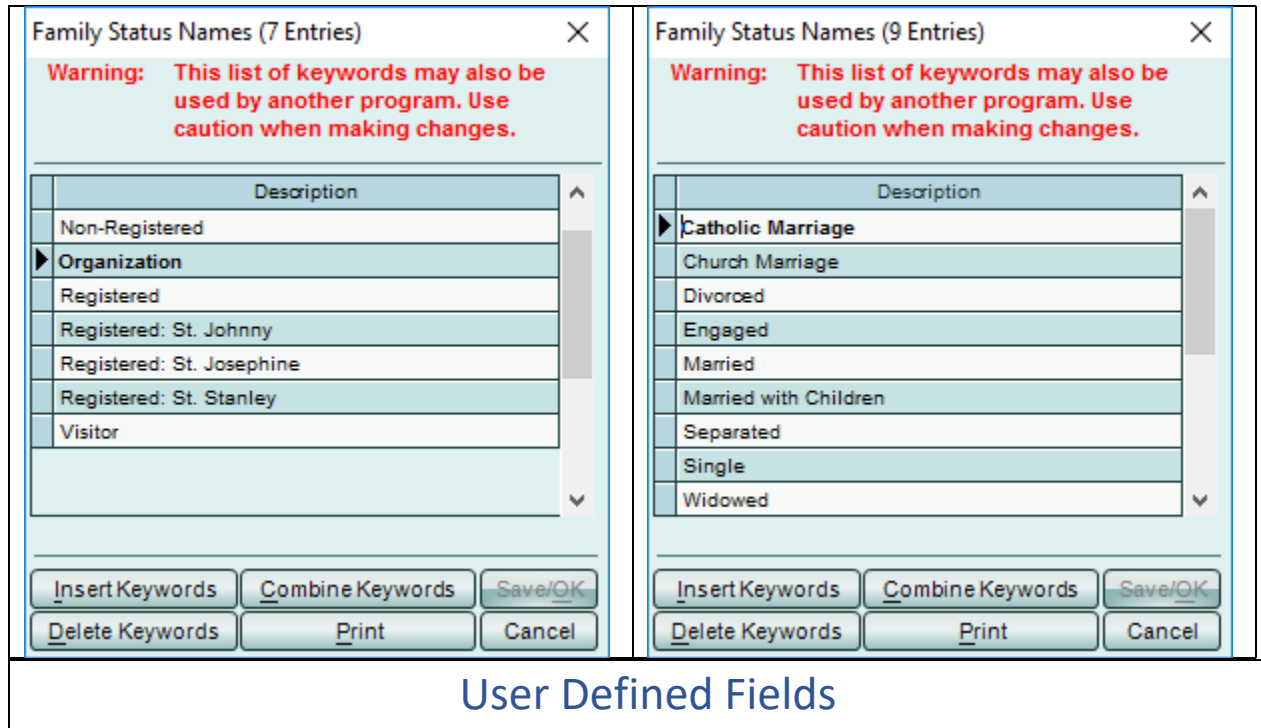
The Marital Status information would not be lost, but would be tracked on the individual MEMBER screen for each member of the family.

Family Status Keyword Option:

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



Your New Values in this pull-down list might look something like this:	Instead of looking something like this:
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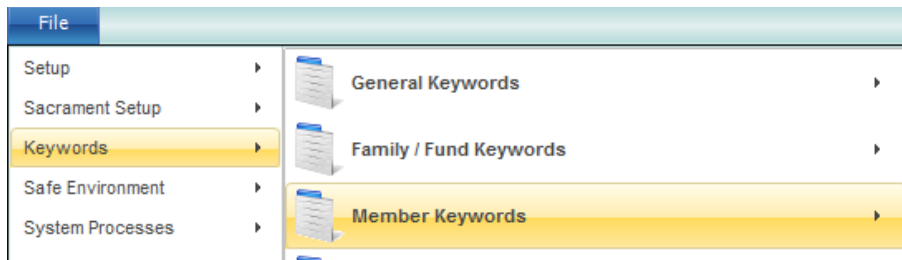


There are times that you might want to create your own user defined fields for use in PDS Church Office. There are a limited number of these User Keyword fields available for use on the Member screen.

Where to Track Strengths?

User Keywords are an excellent way to include member specific strengths from the StrengthFinders™ member profile.

Select: FILE | Keywords | Member Keywords | User Keywords



In our sample data, we've already used several of the User Keywords for the Strengths setup. We can review those by looking at User Keywords 6 thru 10 (Strengths 1 thru 5):

A final setup screen might look like this:

Strength #1 (8 Entries) ✕

Warning: This list of keywords may also be used by another program. Use caution when making changes.

Keyword Name:

Use For: Church

Description
▶ Achiever
Activator
Adaptability
Analytical
Arranger
Belief
Command

In our sample data, we have room to setup one new one, so we'll use User KW11 (User Defined Field 11).

A blank keyword field setup screen will look like this:

User KW 11 (0 Entries) ✕

Warning: This list of keywords may also be used by another program. Use caution when making changes.

Keyword Name:

Use For: Church

Description
▶

For this example, we can create a user keyword titled 'Fav. Food' and then mark it to use for Church.

After initial creation, it would look something like this:

Fav. Food (0 Entries) ✕

Warning: This list of keywords may also be used by another program. Use caution when making changes.

Keyword Name:

Use For: Church

Description

As soon as these User Defined Keyword files are added, they are available on the Member screens for all members:

Parish Data System - Church Office

File Information Personnel Reports Sacramental Registers Administration

Dashboard Families Members Contributions

Search by: Text for Member Name Search. Save Add Member
Order by: Name Cancel Delete Member
Member 1 of 1

Members **Swift, Thomas, Mr.** ID: 1 Inactive Add Documents

Name: Swift, Thomas, Mr. ...

Mem ID/Env: Avail? Show Name Formats

Relationship: Head Type: Head of Household Separate Statement

Grade/Degree: Gender: Male

Marital Status: Single Birth Date: 01/21/1968 Age: 50

Language: English Deceased:

Ethnicity: Strength #2:

Religion: Strength #3:

Disability: Strength #4:

Occupation: Strength #5:

School: Picture File:

Strength #1: Location:

Remarks

Keywords

General
 Confidential
 Special Circumstances

Insert Line Delete Reorder

Screen Changed: 11/07/2018

These New Fields Are Available to Use in Reports and Report Selections Now

Mem Strength #1, Mem Strength #2, Mem Strength #3, Mem Strength #4 and Mem Strength #5, Mem Fav. Food.

Other Fields to Consider

User Keywords are an excellent way to include other member specific information that is not being tracked somewhere else. In our current training setup, we've added two additional USER KEYWORDS:

- School
- HS Grad Year

You can see where those are located:

Parish Data System - Church Office

File Information Personnel Reports Sacramental Registers Administration

Dashboard Families Members Contributions

Search by: Text for Member Name Search..

Order by: Name

Member 1 of 1

Save Add Member Cancel Delete Member

Data Screens Navigation Tasks

Members

Data Entry

Personal

Communication

Sacraments

Ministries/Talents

Attendance

Family Recap

Safe Environment

Letters, Visits, Etc.

Other Tasks

Individual Letter, Label

Reassign Member

Memorial

Listing Screen

Easy Lists

Reports

Quick Posting

Processes

Exit Program

Family: Swift, Thomas, Mr. ID: 1 Inactive Add Documents

Name: Swift, Thomas, Mr.

Mem ID/Env: Avail?

Show Name Formats

Relationship: Head Type: Head of Household Separate Statement

Grade/Degree: Gender: Male

Marital Status: Single Birth Date: 01/21/1966 Age: 50

Language: English Deceased:

Ethnicity: Strength #2:

Religion: Strength #3:

Disability: Strength #4:

Occupation: Strength #5:

School: HS Grad Year: Picture File: Location:

Strength #1: Keywords: Description

Remarks

General Confidential Special Circumstances

Insert Line Delete Reorder

Screen Changed: 11/07/2016

There are a total of eleven user defined fields for your use. Feel free to work with your staff on how these might assist you with your ministries.