

Steps to create a report that can be exported from PDS:

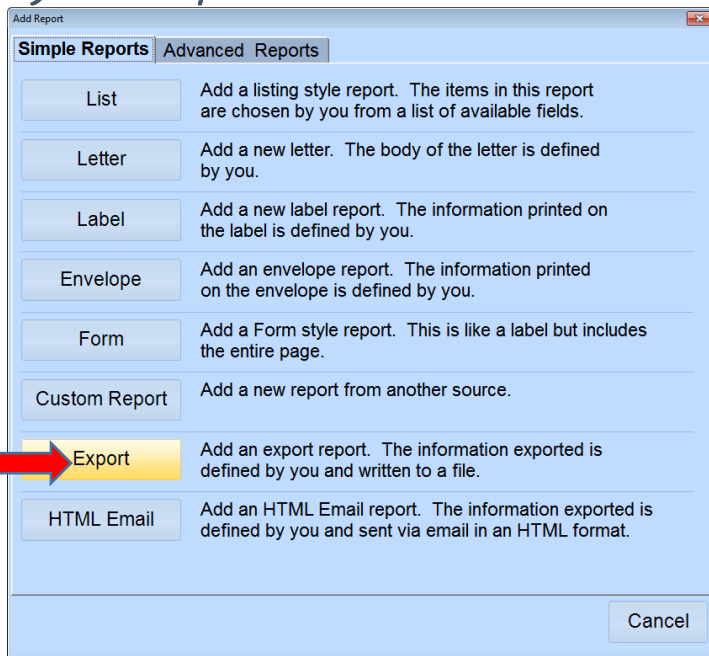
1) Go to: Families and Report on the Families Tab

The screenshot shows the 'Families' tab in the PDS software. The left sidebar contains a menu with 'Reports' highlighted and a red arrow pointing to it. The main area displays a form for family information. The form includes fields for ID/Envelope (104849), Family Name (Anonymous), Registered (Envelope User), Status, Street Address, City/State, ZIP/Postal, and Geog. Area. There are also checkboxes for 'Send No Mail' and 'All Addresses are Unlisted'. Below the form are sections for Phone Number, Description, Unl., and Email Address. A Remarks section is at the bottom with radio buttons for 'General' and 'Confidential'. At the very bottom, it says 'Funds Used by this Family: 1, 3, 8,11,15' and 'Number of Members: 1'.

2) Click Add

The screenshot shows the 'Select Report' dialog box in the PDS software. The dialog has a tree view of report categories: 'Family Reports', 'Stewardship', and 'Relationship Reports'. Under 'Family Reports', there are sub-items like 'Listing Reports', 'Letters/Statements', 'Label/Envelope Reports in Upper Case', 'Label/Envelope Reports in Mixed Case', 'Rolodex/Index Cards', 'Data Exports/Envelope Companies', and 'Family Easy Reports'. Under 'Stewardship', there are 'Ministry - Time and Talent', 'Financial - Treasure', and 'Combined Time, Talent and Treasure'. Under 'Relationship Reports', there are 'Relationship Labels & Envelopes' and 'User Reports'. At the bottom of the dialog, there are buttons for 'Add', 'Delete', 'Copy', and 'Reorder User Reports'. A red arrow points to the 'Add' button.

3) Click export



4) Select fields from family detail: For Census reports to Diocese you will choose the following fields:

Second ID

Name format 14

Address 1

City only

State only

Zip

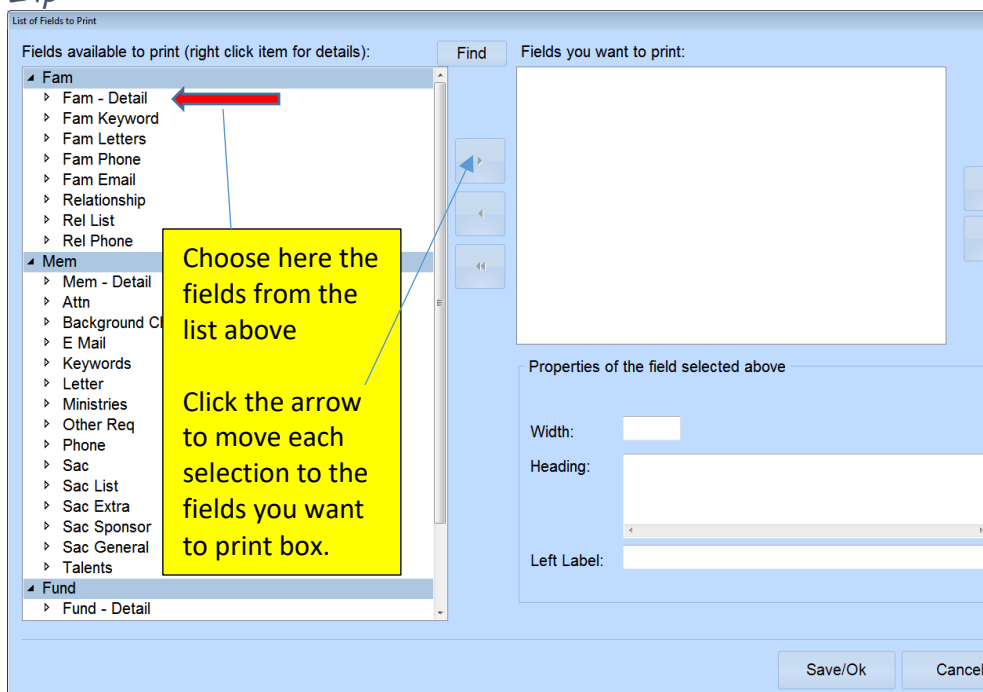
Name format 2

Phone Home

Email 1

Name format 13

Family Keyword Description



5) Verify Your Screen looks like this then Click Save/Okay

List of Fields to Print

Fields available to print (right click item for details):

- Fam - Detail
 - Address 1
 - Address 2
 - Address Block
 - Address Changed
 - Address Remarks
 - All Member Names
 - Alt. Address Day to End
 - Alt. Address Day to Start
 - Alt. Address Month to End
 - Alt. Address Month to Start
 - Alternate Address Block
 - Alternate Address is Certified
 - Alternate Address Line 1
 - Alternate Address Line 2
 - Alternate Carrier Route
 - Alternate City
 - Alternate City Only
 - Alternate DP
 - Alternate Lat
 - Alternate Lng
 - Alternate Period
 - Alternate State Only
 - Alternate Zip
 - At Alt
 - Blank1
 - Blank2

Find

Fields you want to print:

- Fam Second ID Number
- Fam Name Format 14 (Smith, Jr., John & Mary)
- Fam Address 1
- Fam City Only
- Fam State Only
- Fam Zip
- Fam Name Format 2 (Mr. & Mrs. John & Mary Smith, Jr.)
- Fam Phone Home
- Fam Email 1
- Fam Name Format 13 (John & Mary Smith, Jr.)
- Fam Keyword Description

Properties of the field selected above

Width: 12 Word Wrap:

Heading: Fam Second ID Number

Left Label:

Save/Ok Cancel

6) Click Edit and Give your new report a Name "Monthly Census Export"
Then click Next

Parish Data System - Church Office

File Information Personnel Sacramental Registers Reports Processes Administration

Dashboard Families Members Contributions

Return to Families
Select a Different Report

Overview
Export Setup
Select Families

Build Export File
Cancel the Report

Exit Program

Overview:

Name: Monthly Census Report Edit

Description: Edit

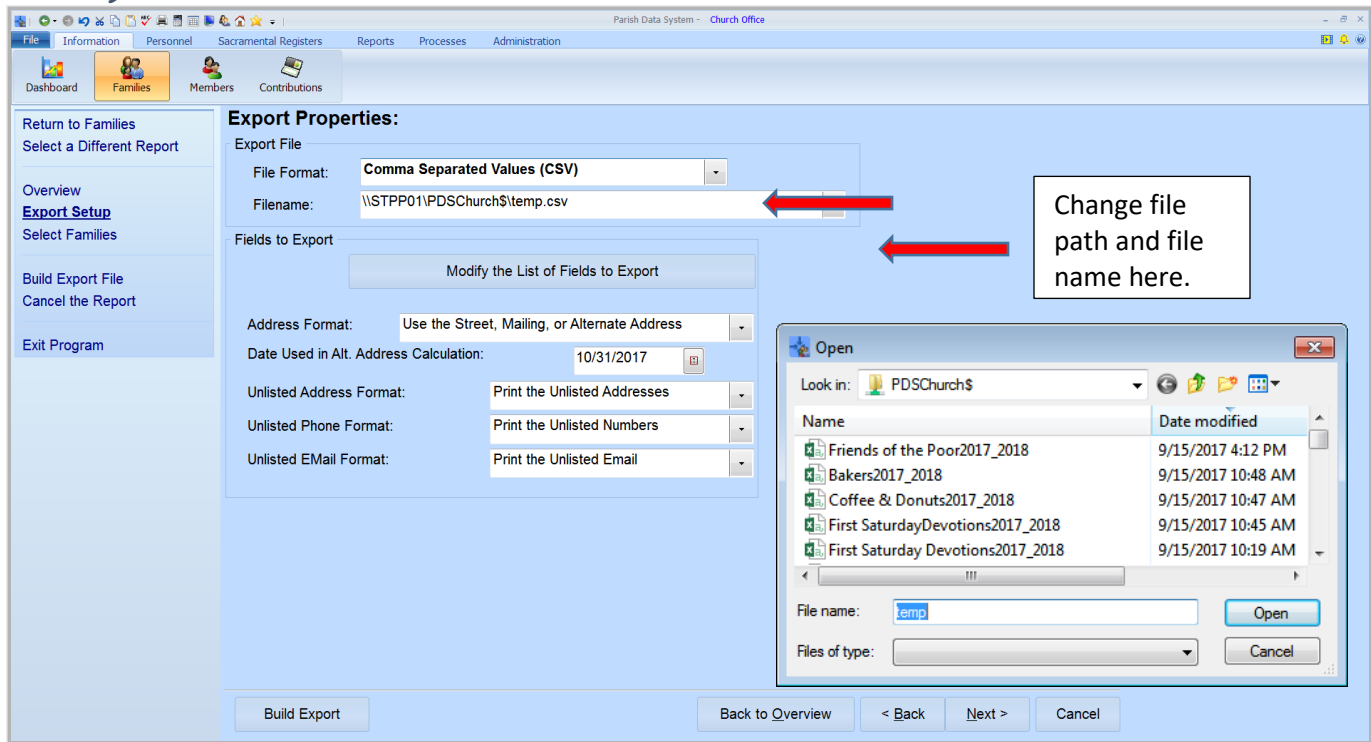
Report Owner: jrhanzen Report Access: Private Print Detailed Overview

Export: Filename: \\STPP01\PDChurch\$\temp.csv
File format: Comma Separated Values (CSV)

Selection: Sort by: ID Number

Build Export < Back Next > Cancel

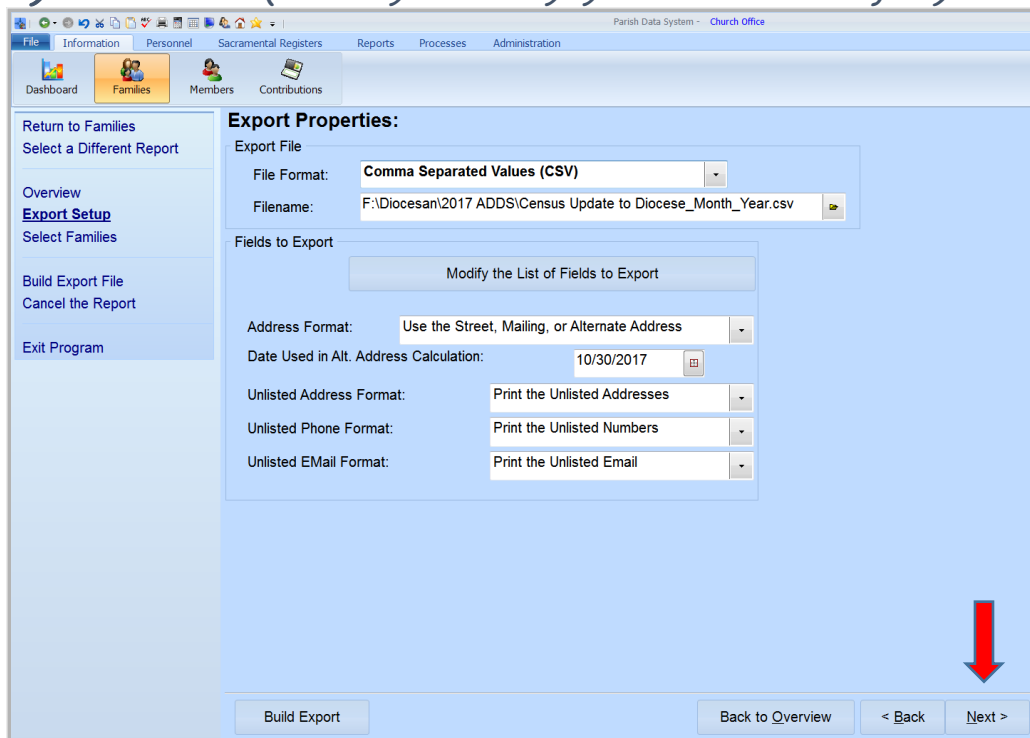
7) Click File Format drop down select Comma Separated Values if not already selected.



8) Click Filename dialog box and set where you want to your file to be saved and what name you want to give it.

You can do something similar each time you run this report. Example below.
From F:\Diocesan\2017 ADDS\Census Update **October_2017**.csv

9) Click Next (after you verify your filenames again)



10) In the Selection Information Tab, Click Add then Click inside the Name dialog box and give your Selection Type a Label Example (Monthly Census to Rockford Diocese)

The screenshot shows the 'Parish Data System - Church Office' interface. The 'Select Families' dialog box is open, with the 'Selection Information' tab selected. The 'Name' field contains 'Monthly Census to Rockford Diocese'. The 'Description' field contains 'Selections based on Keywords to submit to diocese for update to records'. The 'Owner' is 'jrhansen' and 'Access' is 'Private'. The 'Sort Order' is 'ID Number'. The 'Include Family Marked as Loose Collections' checkbox is unchecked. The 'Active / Inactive Restrictions' section has 'Include Active Families' and 'Include Inactive Families' checked. The 'Add' button is highlighted with a red arrow, and the 'Name' field is also highlighted with a red arrow.

11) Click "Additional Selections"

The screenshot shows the 'Parish Data System - Church Office' interface. The 'Select Families' dialog box is open, with the 'Additional Selections' tab selected. The 'Name' field contains 'Simple Selection - Never Saved'. The 'Description' field is empty. The 'Sort Order' is 'ID Number'. The 'Include Family Marked as Loose Collections' checkbox is unchecked. The 'Active / Inactive Restrictions' section has 'Include Active Families' and 'Include Inactive Families' checked. The 'Additional Selections' tab is highlighted with a red arrow.

12) Click on "click here to add a new condition"

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Select Families:

List of Selections:

- Simple Selection - Never Saved
- Diocesan Adds
- Diocesan Changes
- Diocesan Deletes
- 086DIONUM FILE
- Friend of St. Patrick
- Kindergarten-8 families 2014
- Marriage/Anniversary Date List
- Family Listing
- Our Sunday Visitor

Show Only My Selections

Save Add Delete

Clear Copy Reorder

Export Sel. to a File

Import Sel. from a File

Build Export

Selection Information Family Selections **Additional Selections**

Choose records where All of the conditions in the following sub-section are true

< Click here to add new condition >

Clear Additional Selections Exclude rather than include the selected records. Use Optimizer

Back to Overview < Back Build Cancel

13) Click "Fam Keyword"

Click "Description"

Parish Data System - Church Office

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Select Families:

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Selection Information Family Selections **Additional Selections**

Choose records where All of the conditions in the following sub-section are true

1 Fam Keyword.Description is equal to _____ (right click item for details)

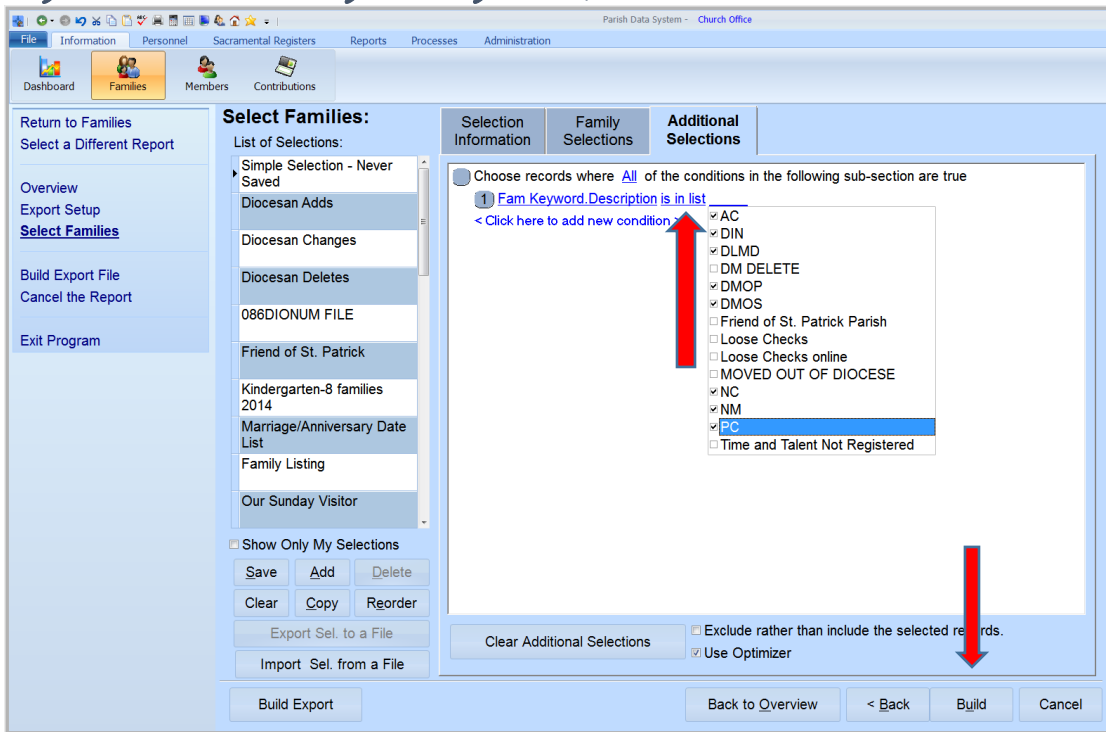
- < Fam
- Fam - Detail
- Fam Keyword**
- Description
- Fam Letters
- Fam Phone
- Fam Email
- Relationship
- Rel List
- Rel Phone
- Mem - Detail
- Mem
- Attn
- Background Chk
- E Mail
- Keywords
- Letter
- Ministries
- Other Req
- Phone
- Sac
- Sac List
- Sac Extra
- Sac Sponsor
- Sac General
- Talents
- Fund - Detail
- Fund
- Fund Hist
- Fund Rate

Click Description.

Cancel

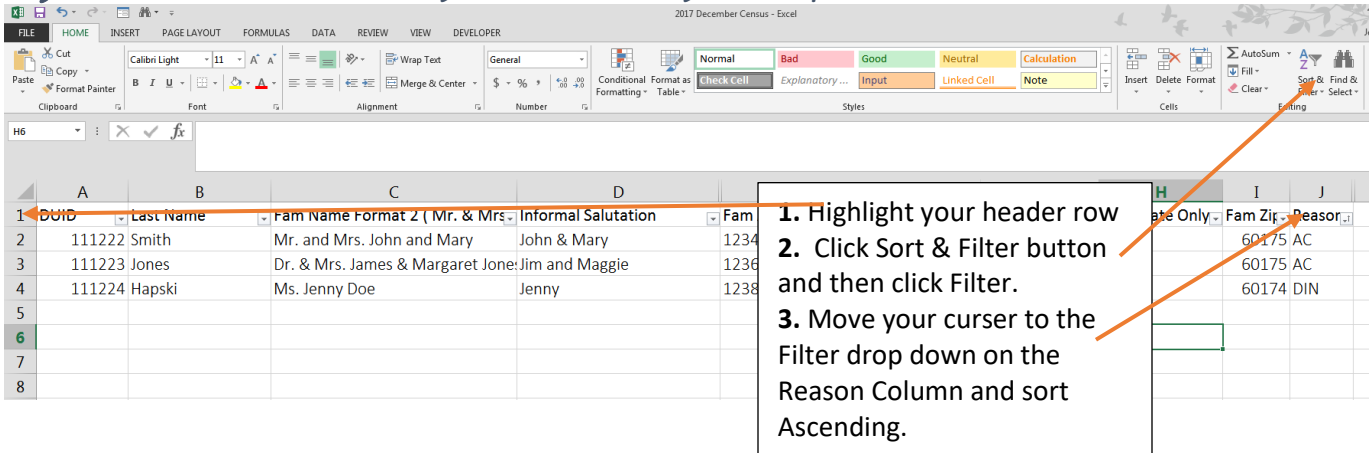
14) Click "is equal to" change to "is in list", then select the blank line and check off all keywords for the Rockford Diocese reports: AC,DIN,NM etc

15) Click Enter on your keyboard, Click Build



Your report will build and export to the file location you listed under filename.

17) Click View File then you can view your report, filter and sort in Excel



18) Save it and send to the diocese at census@rockforddiocese.org with your parish name and number in the subject field and your .csv file attached.

Your finished product will be a CSV file that can be imported by Rockford to Parish Soft. 1-Highlight your Header Row, 2-click Sort and Filter. Then 3- Filter Ascending on the "Keyword" Column