

Diocesan and Parish Data Integration Overview

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Diocesan and Parish Data Integration Overview

1.1 Process Overview

Data Integration is the process of combining the parish data with existing information in the ParishSOFT Diocesan central database for the same parish organization ID. The goal of the process is to limit the number of duplicate families introduced into the ParishSOFT database when bringing a new parish into the system. To accomplish this, we have configured a set of matching logic to identify families that are in both the parish data and the ParishSOFT diocesan database. We use the following standard weights listed below for each field:

Criterion	Matches	Diverges	Null
LastName	30	-155	0
FirstNames	35	-15	0
StreetNumber	13	-5	0
StreetName	15	-5	0
StreetType	4	-2	0
StreetDirection	3	-1	0
ApartmentNo	4	-2	0
City	3	-5	0
State	2	-10	0
Zip5	5	-3	0
Zip4	4	-2	0
Current Organization	1	-250	0
sDiocesanID	0	0	0
Max Possible	119	-455	0

Non-Matched Family Options:

The Diocese has two options for non-matched family records.

1. Have the non-matched family records moved to a holding* tank organization. We recommend the use of our standard organization of: Sync Project Non-Matched Families, which will be automatically generated by ParishSOFT.
2. Leave the non-matched family records in the parish organization.

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1.2 Matching

We will match the families in the Parish data with the Diocesan data, based on the criteria above. Following the completion of the data integration, you will receive a report of which families were matched and those that were not (more details on this in the Reports section below). For each family that is matched between the parish and diocesan data, the following will take place:

- All Family and Member information in the diocesan database will be replaced with all the parish data, including, parish Offering, Ministry Scheduler and Religious Education data.
 - Except:
 - Diocesan Family DUIDs
 - Diocesan Pledges/Contributions

Will be retained from the diocesan record.

- Members with an assignment in the Diocesan database will have their assignment removed if matched to a parish member. This assignment will need to be re added once the integration is complete.

Ineligible for Matching

- If a family is mapped to any other parish in the Diocesan data the Family will be ineligible for matching. These family records will be left in the parish/organization view. Following your data integration production run any of these families that you deemed a match may be merged by the diocese.

1.3 Report Overview

As a part of the Data Integration Process you will receive a report file. These reports are provided in Microsoft Excel and contain specific information regarding the process on each tab. Detail on each report is included below.

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1.3.1 Weight Summary

This report provides a summary of the field weights applied in the matching process. This directly impacts whether or not families are determined to match and are merged during integration.

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1.3.2 Matching Detail

This lists every single family in the parish source data deemed as having a potential match in the diocesan data base. These potential matches are then assigned a Weight value. Our standard cutoff for this weight value is 70. Any record listed below the weight threshold of 70 would be considered a non-match and will be added as a new family to ParishSOFT.

MatchID	SourceID	DUID	Weight	MatchesOn	DivergesOn	NullOn	AIM_LastName	Access_LastName	AIM_Tag	Access_Tag
170	14015919	987611	116	Last Name, First Name(s), Street Di			Tavernit	Tavernit	'Mary'	'Mary'
52	13115919	987402	115	Last Name, First Name(s), Zip Plus,			Sendegas	Sendegas	'Kay'	'Kay'
410	23615919	1040062	112	Last Name, First Name(s), Street Di			Dzienisowicz	Dzienisov	'Emily'	'Emily'
369	9315919	1027745	111	Last Name, First Name(s), Apartme			Nolan	Nolan	'Sandra'	'Sandra', 'U
259	18215919	987865	109	Last Name, F Apartment N Zip Plus,			Fantauzzi	Fantauzzi	'Ida'	'Ida'
1	315919	987340	108	Last Name, First Name(s), Street Di			Beacom	Beacom	'Donald'	'Donald', 'B
175	7215919	987620	103	Last Name, F City	Apartme		Kurkowski	Kurkowsk	'Michael'	'Michael', 'J
288	46015919	987946	80	Last Name, F Street Name, Street Di			Anderson	Anderson	'Stuart'	'Stuart', 'Ni
483	46615919	1241523	80	Last Name, F Street Name, Street Di			Gutierrez	Gutierrez	'Gale', 'Jor	'Jorge', 'Gal
461	31315919	1070498	72	Last Name, F City	Street Nu		Bushor	Bushor	'Lloyd'	'Lloyd'
447	13715919	1040127	69	Last Name, Street Number First Nam			Stach	Stach	'Katarzyna	'Katarzyna',
327	24615919	1008858	69	Last Name, Street Number First Nam			Whitefield	Whitefiel	', 'Daryl'	'Daryl', 'Ter
480	33815919	1221945	69	Last Name, Street Number First Nam			Singles	Singles	'Mary Jo.', 'Keith', 'Ma	
477	38015919	1221931	69	Last Name, Street Number First Nam			James	James	'Lincoln', 'I	'Greg', 'Den

**The diocese has two options for non-matched family records. 1) Move the records to a holding tank organization. 2) Leave the non-matched family records in the parish organization.*

1.4 Process Schedule

Once the decision has been made to move to ParishSOFT we will assist you in selecting a date to complete this process. Note: If the move to ParishSOFT is a part of an Arch/Diocesan group rollout, the schedule will be coordinated between the Arch/Diocese and the ParishSOFT project manager and communicated to the parish by the Arch/Diocese. The parish should get started on any data cleanup steps required prior to the integration once they have been scheduled.

1.4.1 Initial Data Submission

When the parish is converting from another software source:

They will complete a conversion checklist and receive an FTP site to use for data submission. They should upload their data to this site by the end of business, the day

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before, their scheduled conversion date. **Once the backup is submitted the parish can continue using their current system.**

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1.4.2 Integration Review

When the parish is converting from another software source:

We will use the conversion checklist submitted by the parish to validate and convert the parish data. When the conversion is completed the parish will receive a login to a temporary ParishSOFT site to review the parish converted data. The parish will receive a conversion report to assist in their conversion review. While we complete intensive internal data checks throughout the conversion process, it is important to verify the information is correct in the interface from the parish perspective. Once the parish has validated the converted data is accurate, they will submit a conversion signoff to ParishSOFT so the process can move to the next step and the data integration review will be scheduled.

During the data integration review process, we will integrate the parish data with the ParishSOFT diocesan data and provide both the parish and Arch/Diocese with a login to a temporary ParishSOFT site to review the data integration. You will receive the previously mentioned reports documenting what happened in the integration process to assist in your review. While we complete intensive internal data checks throughout the integration process, it is important to verify the information is correct in the interface from both the parish and diocesan perspectives. Once the parish and Arch/Diocese have validated the data is correct, both will submit a data approval to ParishSOFT and the production integration will be scheduled.

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1.4.3 Production Run

When the parish is converting from another software source:

We will use the **original** backup supplied for the conversion into ParishSOFT Family Suite. Once the parish data has been loaded into ParishSOFT the parish will receive login credentials. At this point the parish is live in the system. We recommend the parish and arch/diocese complete one final review of the data.

At this point the Arch/Diocese may supply the parish with the list of non-matched families for review.

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1.5 Timeline for Data Integration

1.5.1 Conversion

Data Conversion/Integration Timeline	Business Days to Complete
Parish completes Conversion Checklist and submits backup	2
ParishSOFT completes data conversion and provides parish with staging site for review.	3-5
Parish reviews converted data in a staging site and if there are data discrepancies reports them to ParishSOFT Implementations.	3-5
In the event there are data discrepancies, the ParishSOFT data team will provide a response about the discrepancies within 2-3 business days. Depending on the severity of the issue it may take longer than that to resolve the issue; however, the team will assess the issue and respond within the 2-3 business days. Please note we schedule review items beginning on Monday of a working week.	5
Parish Signs-Off on converted data	1
ParishSOFT Integrates data into a new staging site and provides both the parish and arch/diocese with logins to review.	3
Parish & Diocese review and sign-off on Integrated data in Staging site for go-live.	3-5
Parish submits final data file and stops working in their data.	2
ParishSOFT completes Data Integration into production and provides parish full access This final process takes 3 business days from your scheduled start date	3-5
Total Estimated Integration Time *Please note your timeline can vary	25-33