# THE ROMAN CATHOLIC
# ARCHDIOCESE OF ATLANTA

# Memo

**Date:**       **June 6, 2016**

**To:**         **Pastors and Parish Business Manager**

**From:**       **Susan Shirley, Parish Systems Administrator**

**Re:**         ParishSOFT Upgrade to ConnectNOW Family Suite

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Transition from ParishSOFT Desktop Software Application to ConnectNow Family Suite
***This checklist should serve as a guide of what to do prior, during and following transition.***

**Complete the following steps to verify the accuracy of your transition.**

**To Be Completed by the Church Prior to Transition:**

**Family Directory Module:**
1. Run Duplicate Checker to eliminate any duplicates within your parish data.
   a. **Video Help:**
   http://www.parishsoft.com/support/videos/DuplicateChecker/DuplicateChecker.html
   b. **User Guide:**
   http://www.parishsoft.com/support/Documentation/psDuplicateChecker_Parishes_v3626xR2.pdf

2. Make sure all ParishSOFT users have a named Staff Member Record in your ParishSOFT database with login credentials, and both a Family and a Member record in your parish database for that staff member.
   a. This is required for the staff record to be displayed in the new ConnectNow platform. System
   Admin will no longer be a valid login.

**Offering and Pledges:**
1. Close all Batches in the Offering module before transition.

**Religious Education Module:**
1. There is no work to be done on your part in preparation for the transition of Religious Education data.

**Tuition Module:**
1. Tuition data does not transition from desktop. If you plan on using Tuition in ConnectNow you will need to set up that module and start fresh following your transition.

**Time & Talent Module:**
1. There is no work to be done on your part in preparation for the transition of Time & Talent data.

**Parish IQ:**
1. Parish IQ queries do not transfer to ConnectNow IQ and will need to be recreated following your transition.

**Family Directory:**
1. We will verify you do not have any duplicate envelope numbers assigned (the same number associated to multiple families/members). Any envelope numbers that are duplicated will NOT be moved into ConnectNow. We will remove the duplicated envelope numbers from all records involved. You will receive a report of these envelopes to reassign to the correct family/member post transition.
2. We will verify that all records have a valid Family Group associated with them. All records without a valid Family Group will be set to Inactive in ConnectNow.

**Offering and Pledges:**
1. If you have posted contributions through the Desktop Offering module that should be applied to a Pledge, we will run a script as a part of the transition process that will ensure the link between contributions and pledges is correctly established.

**Religious Education:**
1. If you have any incomplete Religious Ed information, the ParishSOFT Transition team with populate it using the following guidelines:
   a. Add missing session start/end dates and times
   b. Ensure sessions end on or after their start date/time
   c. Ensure the start/end dates are contained within the corresponding school year
2. ParishSOFT will migrate your Religious Ed data into ConnectNow for you using the default settings listed below.
   <u>Grades</u>
   - Map one to one (2=>2, K=>K, etc…)

Catechists
- Catechist 1 =>Catechist
- Catechist 2 =>Assistant Catechist
- Catechist 3 =>Assistant Catechist

Rooms
- ParishSOFT does not setup rooms in the default migration. The user can setup new rooms in ConnectNow following the completion of the transition.

You may also choose to migrate your own Religious Ed data post transition using the Manual Migration tool available in ConnectNow. The following video from the ParishSOFT website demonstrates how to map desktop data to the new ConnectNow Religious Education fields: http://www.parishsoft.com/familysuite/video.htm

### Time & Talent Module:
1. We will ensure that ALL Ministry Groups have an Event associated to them. If no event it present, we will create an event of 'N/A' for you as a part of the transition.
2. We will verify that ALL Ministers are associated with a ministry and event. If there are any ministers not associated with a ministry and/or event, we will provide a list to you post transition so you can update them accordingly in ConnectNow Ministry Scheduler.

**ParishSOFT will provide you a transition report post transition with the following counts comparing your Desktop data to the data transitioned to ConnectNow Family Suite. Please review the counts and validate they represent your expected values.**

**Family Directory Counts**
"Registered" Families
"Both" Families
"Both" Families in the "Active" Family Group
Families/Members to Receive Envelopes
"Do Not Send Mail" Families
Family Workgroups

**Offering & Pledges Counts**
Funds
Pledge Totals

**We also ask that you validate the following items post transition to ensure the data is as expected in ConnectNow and there are no discrepancies.**

### Family Directory Module
1. Family Groups
   a. Compare your Desktop Family Groups to the ConnectNow Family Groups

2. Run the ENVELOPE report from Desktop and use it to compare to the ConnectNow Envelope report.
3. Family Workgroups
   a. Compare a few family records in each workgroup from the Desktop to the same workgroup in ConnectNow.

## Offering and Pledges Module
4. Compare All Fund Names from the Desktop to the Fund Names in ConnectNow.
5. Run the Pastors Report in the Desktop and ConnectNow and compare the two.
6. If you tracked pledges in the Desktop, print the Pledge report from Desktop and ConnectNow to compare the two.
   a. The Pledge ID# is referenced in the desktop application. When you transition to ConnectNow, the database instead references the Pledge DUID# which is also available in the desktop application. Those are two different data field. The Pledge ID# is no longer used in ConnectNow. When you compare the Desktop Pledge report to the ConnectNow Pledge report, you will want to reference the Pledge DUID# as the common data field.

## Time & Talent Module
1. Compare All Ministry Groups and Events from Desktop to ConnectNow.
2. Compare a few Ministers in each Ministry Group and Event in the Desktop to ConnectNow.

## SYNCRONIZING PARISHES ONLY
1. Compare a few Family records in your Desktop database that are Registered to another parish to the same records in ConnectNow to verify the data is consistent between the two systems.

## Tuition Module:
1. Tuition data does not transition from desktop. If you plan on using Tuition in ConnectNow you will need to set up that module and start fresh.
2. Run full-year tuition reports for each year in the desktop database.
3. Following your transition, post annual totals to the ConnectNow product for historical purposes.

## Parish IQ:
1. Parish IQ queries do not transfer into ConnectNow IQ. You will need to recreate any queries you wish to use in ConnectNow in the ConnectNow IQ tool.
   a. Print out each of your Desktop Parish IQ queries so you can easily rebuild them in ConnectNow IQ with the same columns and conditions.