

## Software Requirements Gabriel Software

This document is the result of a meeting between The Catholic Foundation (CF), CCS an organization that manages the One by One Capital Campaign, and the Information Technology department at the Diocese of Green Bay. This meeting was held on March 12<sup>th</sup> in Melania 13 conference room on the Diocesan campus. The software requirements to produce the desired outcome are included in this document.

This meeting produced three goals to accomplish with these software requirements. The desired deadline for these goals is April 8<sup>th</sup> 2020.

1. Produce a csv file that contains summary financial information summarized by Parish, Registered family and Year.
2. Produce a csv file that contains registered family demographic information and family ID numbers.
3. Provide the ability to receive bulk Constituent ID numbers from the CF, to be used to populate Gabriel Software which ties the family IDs together for two separate systems.

### Goal Number One and Two

#### Security -

The Catholic Foundation (CF) has already received written permission from the majority of the Pastors to extract the data from the Gabriel Software system. We currently have eight CF staff with some security clearance to all Parishes in Gabriel Software. If additional security roles are needed, to run this report across selected Parishes, we will need the ability to globally set those rights for the CF staff. We also authorize the creation of this new security role.

Any transmission of family financial information, outside of producing the report in Gabriel and the Diocese of Green Bay network, will be sent through secure data channels only. Secure email and secure file transfer tools are available and must be used to transmit data between all parties outside of network.

#### Running the Report -

1. A listing to select multiple Parishes in one report should be made available. This report should be designed to run between 1 and all Parishes at one time.
2. A listing of available years to run the report should be made available. The 3 years selected by the user should be displayed on the report. 3 years must be selected by the user. The year selection list should contain the most recent seven years descending order.
  - a. Today that list should say 2020,2019,2018,2017,2016,2015,2014
  - b. January 1<sup>st</sup>, 2021 that list should say 2021,2020,2019,2018,2017,2016,2015

Parish must have offertory recorded in Gabriel Software for the years selected.

### Goal Number 3

The Constituent ID is a unique ID value generated by the Raisers Edge software system contracted by CF. A Constituent ID equals one Contributing Unit. A Contributing Unit at the Parish is one family unit with a unique integer value called the Family ID. One Constituent ID equals one Family ID.

### Requirements – csv Report file

1. It is believed that the first two goals above can be accomplished with one report.
2. The report will be restricted to “Registered” families at each parish.
3. The funds on the report will be restricted to weekend and Holy Day offertory.
4. The report should summarize offertory by family by calendar year.
5. The report will summarize offertory in a fourth column. The fourth summary column will contain a summary of all offertory the family made to all other parishes in the most recent year selected.
6. The report will have one data row per family ID.

### Fields Required

Page Header will have the Registered Church ID, Registered Parish Name and Parish City. A new page must be started when the Registered Church ID changes.

1. Family ID
2. Constituent ID ( Gabriel SysRefString converted from ParishSOFT).
3. Family StatusCode
4. Family First Name
5. Family Last Name
6. Family Address line 1
7. Family Address line 2
8. Family City
9. Family State
10. Family Zip Code
11. Summary Year 1 (oldest year) Offertory
12. Summary Year 2 Offertory
13. Summary Year 3 (most recent year) Offertory
14. Other Summary Year 3 Offertory (Summary of offertory to all other parishes in Year 3)

### Requirements – Receive Bulk Constituent ID for population into Gabriel

Two fields are required to populate Gabriel Software with an updated Constituent ID, Family ID and SysRefString . SysRefString currently represents the Constituent ID number that came over from ParishSOFT during the migration to Gabriel Software.

SysRefString is not visible through any screens or reports currently available in Gabriel Software. It is a field that exists in the families table and was used to hold the sDiocesanID field that came from ParishSOFT Family table.

In addition to exposing the SysRefString field in the above csv report, it should be made available in the Administrative tab for the family in the Gabriel application. This field should be writable by parish and CF staff. The label for this field should say Constituent ID. Training will be provided to the Parish as to what this new field means.

#### Bulk Updates

An Excel or csv file should be provided to Gabriel software with the current Gabriel Family ID number with the updated Constituent ID in the same row. Gabriel will execute an update SQL statement to install the new Constituent ID for the Family into Gabriel.

Two fields are required on the Excel or csv file per row.

1. Gabriel Family ID
2. New Constituent ID

These fields are optional in the file per row.

1. Family First Name
2. Family Last Name
3. Family Address line 1
4. Family Address line 2
5. Family City
6. Family State
7. Family Zip Code