Blackbaud

BLACKBAUD
ONLINE USER CLINICS

Log on, Listen, and Learn

Make the world a better place.

The Raiser's Edge Online User Clinics: Database Cleanup

August 19, 2010

Host: William Jankins, Solutions Consultant

Q&A and Technical Assistance

To submit a text question:

1) Click the 'Q&A' pane
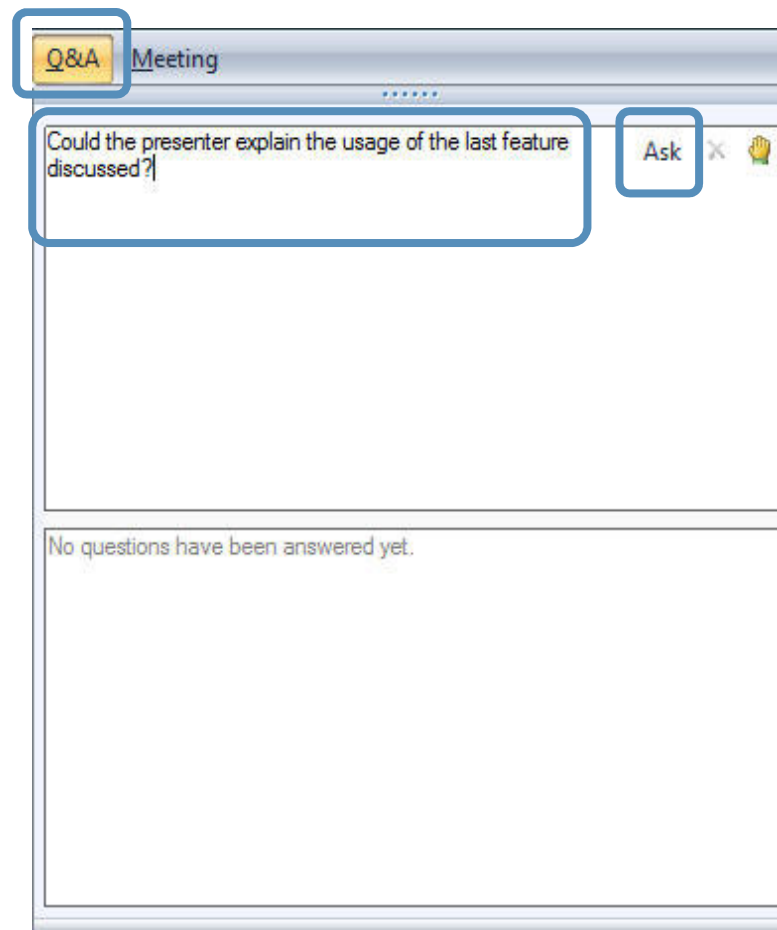2) Type your question
3) Click the 'Ask' button

Note: Use the scroll button to scroll to your answer if necessary.

For technical assistance connecting:

Intercall: 800.374.1852

Live Meeting: 866.493.2825

Note: These numbers are for technical assistance. They are not the call-in numbers to listen to the event.


Q&A   Meeting

Could the presenter explain the usage of the last feature discussed?   Ask ✕ ✋

No questions have been answered yet.

Agenda

- Welcome and Introductions
- Blackbaud News and Updates
- Database Cleanup Presentation
- Upcoming Web Events
- How Blackbaud Can Help
- Q&A

Blackbaud NetCommunity Spark™

o Blackbaud NetCommunity Spark is a new online marketing and membership solution that ignites your website!

o Spark seamlessly integrates with The Raiser's Edge

o Bring your website to life with:
   • Unmatched online membership and fundraising tools
   • Email marketing to help drive new & renewing support
   • Online event management and registrations

o Join us for a free web seminar: Ignite Your Website with Blackbaud NetCommunity Spark
   • September 2 at 2:00 p.m. ET
   • September 14 at 2:00 p.m. ET
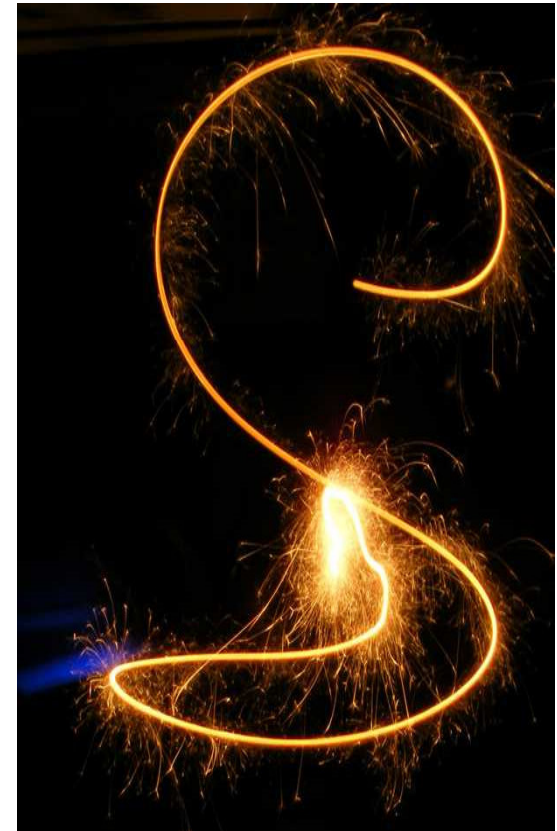
Blackbaud Learn™

○ Blackbaud Learn is an annual training subscription offered in tiered packages to best serve your training needs:

- Learn
- Learn More
- Learn Everything

○ Training is available for the following solutions:

- The Raiser's Edge 7
- The Financial Edge
- The Education Edge
- Blackbaud NetCommunity
- Blackbaud Sphere

Blackbaud Learn™

Get the most out of your solutions with Blackbaud Learn!

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Blackbaud Application Hosting™

➢ **Security**: World-class security measures that employ 24/7/365 system monitoring

➢ **Uptime Guarantees**: 99.9% or better uptime – applications are always available and designed to perform at the optimal level

➢ **Disaster Recovery**: Immediate access to key business applications, even when unforeseen events pose an obstacle or threat

➢ **Cost Control and Savings**: Subscription-based services make IT costs steady and predictable

➢ **Remote Access**: Access your Blackbaud software anytime, anywhere via a web browser

➢ **Availability**: Host The Raiser's Edge, The Financial Edge, Blackbaud NetCommunity, The Education Edge, Faculty Access for the Web, NetClassroom, Student Information System, The Patron Edge Online, Blackbaud Enterprise CRM, Blackbaud Direct Marketing, and The Researcher's Edge

o Blackbaud's Conference for Nonprofits is the premier nonprofit event of the year. This two-day professional development and networking event is perfect for anyone who works in the nonprofit community.

o **October 20 – 22, 2010**
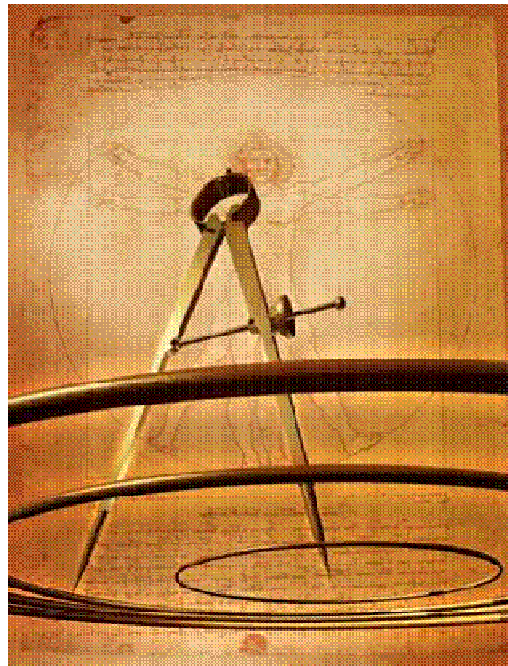 **Gaylord National Hotel and Convention Center**
  Washington, D.C.

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Before you start!

○ **Back up your database**

» How to schedule a backup through the Blackbaud Management Console (SQL Server) **BB Solution # BB97191**

» How to manually backup the SQL Server database – **BB Solution # BB94455**

» How to restore from or test a backup in the SQL Server versions – **BB Solution # BB96254** - What!?! I have to test the back up, too?!?!

◆ **Plan** for scheduled cleanup maintenance

◆ **Practice** on Sample Data first!

◆ **Who** is doing the cleanup? Security?
Lock it down!

◆ **Evaluate** the results

Database Cleanup

Some places to start…

o **Code Tables**

o **Attributes & Appeals**

o **Duplicate Records**

Database Cleanup – Code Tables

○ Do all code tables have a purpose?

○ Similar/Duplicate table entries

○ Mark archived entries as "Inactive"

○ Table order (promote most frequently used entries)

○ Clean up everything from Letter Codes to Titles!

📄 MR
📄 Mr.
📄 Mrs
📄 Ms.
📄 Miss
📄 Mrs.
📄 Dr.
📄 Drs.
📄 Admiral
📄 Ambassador

Edit Phone Type

Description: Cellular Phone

Phone number type: Telephone Number

Phone number format: #(###)###-#### x####

☑ Do not share phones of this type

☐ Inactive

OK   Cancel
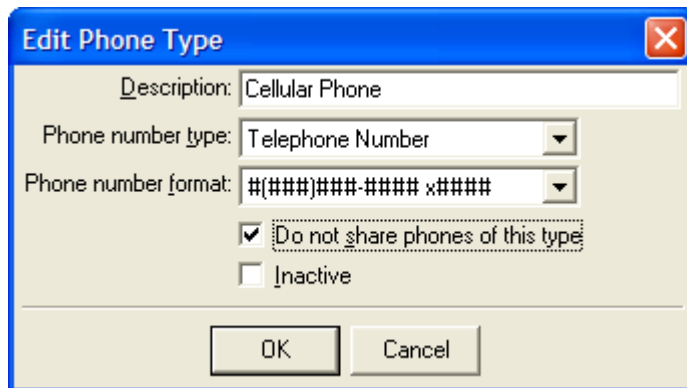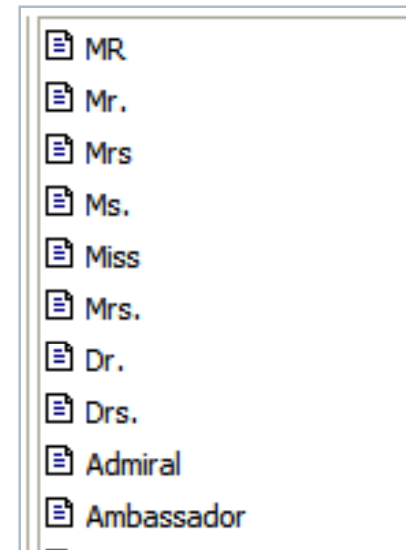
○ Remember phone types have more options than all other table entries

Straighten-up your drop-downs

Also...

- Get rid of misspellings & duplicates

- Standardize the Database

- **Code Table Security!?**

- No need for a query

- Table Clean-Up Wizard used for on-going clean-up!

Titles Table Cleanup

Titles table entries to be replaced
Mr..
Mister
MR

Constituents
Records

Replace with Mr.   ▼

☑ Delete table entries that are being replaced

The areas listed above use entries from Titles table. Entries found in any of those areas will be replaced.

Replace Now   Cancel

Function is found in **Configuration, Tables, Table Cleanup**.

Setting Up Fields & Attributes

Do you ever feel like The Raiser's Edge has either too much or too little information? Did you know that you can:

- Hide fields

- Rename fields

- Make fields required

- Turn fields into tables to streamline data entry

- Design your own fields (Attributes) to track anything!

- Use Attributes to filter reports

Fields & Attributes Continued

Fields:

Accessed from Config in RE7:

- Change display name (rename them for other uses!)

- Make required

- Make hidden (hide unused fields!)

- Turn into lookup fields (table-driven)

Fields & Attributes Continued

Attributes:

Accessed from Config in RE7:

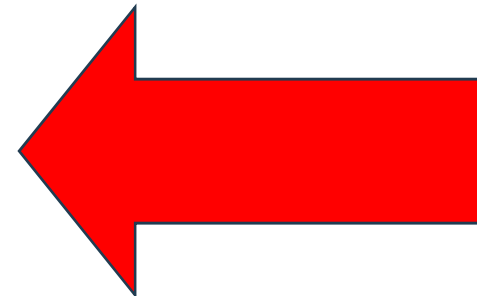- Design your own fields
- Filter reports by them!
- Make them required
- Allow one per record

Allowed data types:

1. **Text**
2. **Number**
3. **Date**
4. **Currency**
5. **Yes/No**
6. **Table**
7. **Constituent Name**
8. **Fuzzy Date**

Configuration • Attributes - Sample Data

	Description	Data Type	Table Name	Allow Only 1 per R...	Requ...
Constituent	Staff Manager	Constituent Name		☑	☐
Gift	Special Mailing Types	Table	Special Mailing Types	☐	☐
Action	Retirement Date	Date		☑	☐
Event	Origin	Table	Origin	☑	☐
Participant	Organization Type	Table	Organization Type - ...	☐	☐
Education	MergeID	Text		☐	☐
Campaign	Medical Facilities	Table	Medical Facilities	☐	☐
Fund	Interests	Table	Interests	☐	☐
Appeal	Inactive	Table	Inactive	☐	☐
Package	Dietary Preference	Table	Dietary Preference	☐	☐
Address	Diagnoses	Table	Diagnoses	☐	☐
Job	Committees	Table	Committees	☐	☐
Membership	Closing Codes	Table	Closing Codes	☐	☐
Individual relationship	Business Hours	Text		☑	☐
Organization relationship	Availability	Table	Availability	☑	☐
Account	Anniversary	Date		☐	☐
Proposal					

Configuration:
General, Tables, Addressees / Salutations, Attributes, Financial Institutions, General Ledger, Letters, International, Business Rules, Fields, Membership Categories, Custom Views, Reporting Hierarchies

Cleaning Up Attributes

○ Limit use of attributes (only use when necessary), consider renaming fields)

○ Data type: text vs. table

○ Allow only 1 per record?
   Required? Checkboxes

Knowledgebase Tip: BB133433
How to globally delete an attribute! Don't forget to backup the database first!

Description	Data T...	Table N...	Allow Only 1 per Record	Required
Committees	Table	Committ...	☐	☐
Interests	Table	Interests	☐	☐
Board Consideration?	Yes/No		☑	☐
Anniversary	Date		☐	☐
Language	Table	Languages	☑	☐
Closing Codes	Table	Closing ...	☑	☐
Volunteer Type	Table	Volunte...	☐	☐
Volunteer Skills	Table	Volunte...	☐	☐
Availability	Table	Availability	☑	☐

Think "globally"….

- Globally Add Records

- Globally Change Records

- Globally Delete Records


Administration

- System Statistics
- Import
- Globally Add Records
- Globally Change Records
- Globally Delete Records
- Globally Write Off Pledges
- Convert Pledges To Recurring Gifts

- Post to General Ledger
- Duplicate Constituents
- Merge Constituents
- Drop Lapsed Members
- Security
- Queue
- Data Enrichment Services

Think "globally"....

Get rid of unnecessary attribute clutter

Screen is found in Admin, Global Delete.
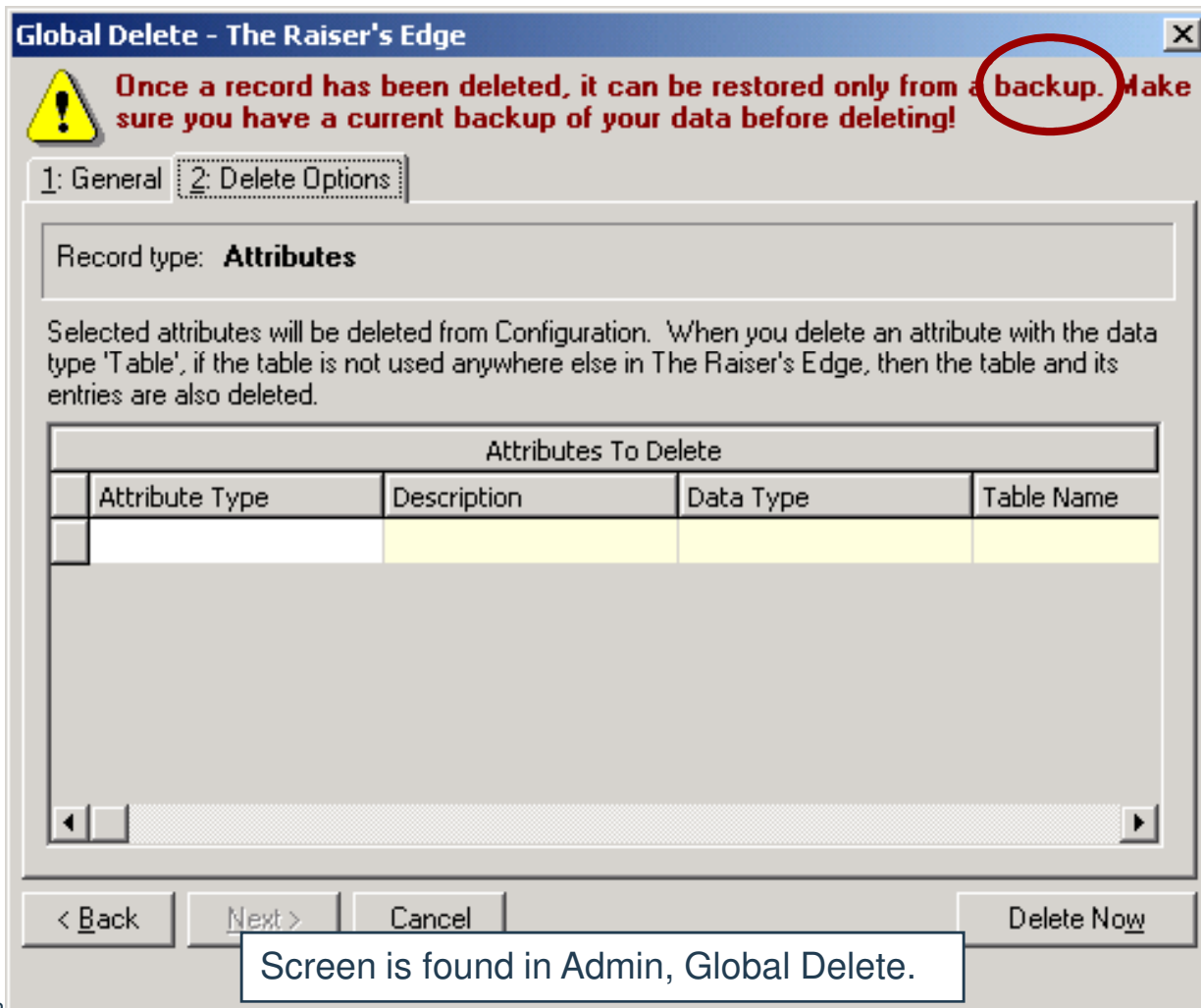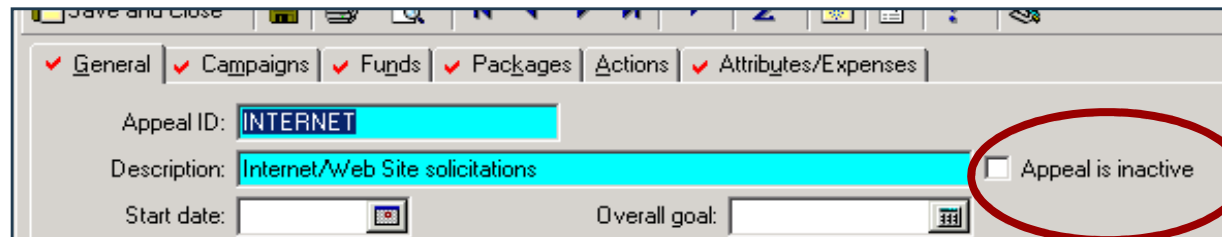
Ask yourself:

1. Are we actively using the attribute?

2. Does it provide valuable info?

3. Does anyone know what it means?!?!

If you answered No, No, and **NO**!, it needs to go. (Make sure to back up)

And then...
Extend your planning/clean up to other record types

- Using a gift attribute or code to track online giving (all online gifts)
- Cleaning up **Campaigns, Funds,** and **Appeals** to reflect your fundraising processes (globally replace!)
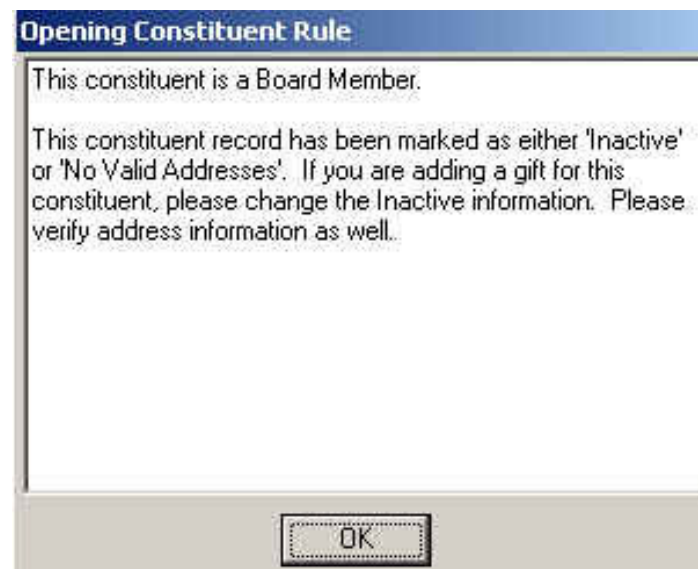- Structuring your system to reflect reality!

Take advantage of the Inactive checkbox to
postpone cleanup that can come later.

Use Business Rules to Assist in Cleanup

Business Rules:

- Speed up data-entry!
- Ensure accuracy!
- Provide excellent donor service!
- For opening constituents
- For adding gifts
- For adding actions
- User-defined

Opening Constituent Rule

This constituent is a Board Member.

This constituent record has been marked as either 'Inactive' or 'No Valid Addresses'. If you are adding a gift for this constituent, please change the Inactive information. Please verify address information as well.

OK

Opening Constituent Rule

This constituent is a Board Member.

OK

Accessed from Config, Business Rules, User Defined Rules

Use BLANK queries to create business rules that will automatically clean up your database over time.

1 Config

2 Business Rules

3 User defined rules
- Constituent
- Gift
- Action

4 New Opening Constituent Rule
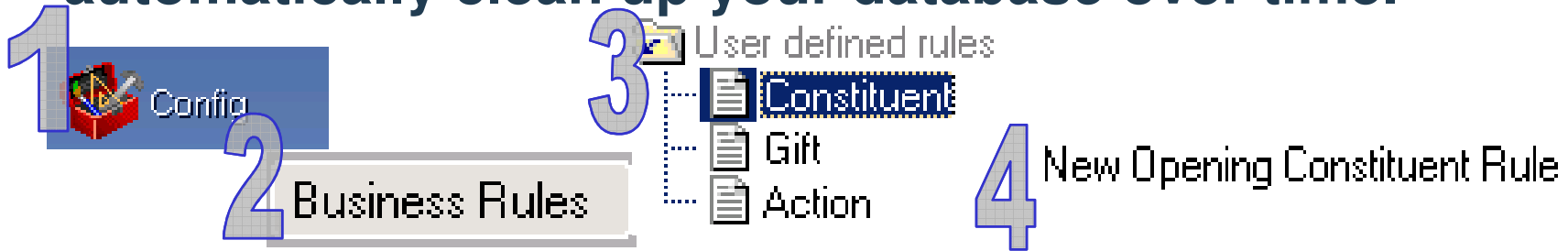
5

New Rule for Opening Constituents

Rule name:	Warn if somebody has missing address lines
Query name:	Records with blank addresses
Message:	This record currently has missing address information. Please correct this situation if possible. Thanks for helping clean up our database!

6

Opening Constituent Rule

ℹ This record currently has missing address information. Please correct this situation if possible. Thanks for helping clean up our database!

OK

Common Cleanup Queries

- Constituent ID - Blank

- Inactive? equals Yes

- Preferred Address Line 1 - Blank
  or Preferred City – Blank

- Primary Salutation - Blank
  and Key Indicator equals Individual

- Constituent Code - Blank

- Title 1 - Blank

Noticing a trend?

Cleaning up Duplicates: Easy as 1,2,3!

Step 1: Set your options first!

(found in **Configuration, Business Rules, Duplicates**)

Step 2: Run the Duplicate Constituent Report

(found in **Admin, Duplicate Constituents**)

Step 3: Finally, merge those duplicates!

(found in **Admin, Merge Constituents**)

Summary Notes

- The adage is true - junk in *really* is junk out.

- Use Business Rules (Configuration) and Security (Admin) to help manage ongoing clean up.

- Make sure your database and the information in it reflect your reality.

- Document Everything! Use a Policy & Procedure book to record what was changed and why.

  - Don't have one? Check out our website and use the CASE method!

Don't forget to Document!
Policies and Procedures

- Documented & Available!

- Coding System/Inactivity Requirements

- Security Standards

- Business Rules

- Backup Plan

- Follow-up Plan (What works – What won't)

- Ongoing budget considerations (Training, other assistance, add-ons?)

The Raiser's Edge Online User Clinics

Topic	Date
Homepage and Dashboards	1/21/10
Database Cleanup	2/18/10
Batching and PCI Compliance	3/18/10
Querying	4/15/10
Mail Merging	5/20/10
Action Tracks and Moves Management®	6/17/10
Reporting in The Raiser's Edge 7	7/15/10
Database Cleanup	8/19/10
Tracking Solicitors and Appeals	9/16/10
Importing	10/21/10
Split Gifts and Soft Credits	11/18/10
Security and PCI Compliance	12/16/10

Upcoming Web Seminars

o Getting to Know AuctionMaestro Pro
- August 25 at 2:00 p.m. ET
- September 29 at 2:00 p.m. ET

o The Financial Edge for Raiser's Edge Customers
- September 1 at 2:00 p.m. ET

o For a schedule of all upcoming web seminars or to register, go to www.blackbaud.com/webinars.

How Blackbaud Can Help

Contact Blackbaud Support for more information on:

- Additional Modules: Multiple module purchases and bundled training
- Training Services: Blackbaud Learn™
- Hosting Services: Blackbaud Application Hosting™
- Consulting Services: Conversions, customizations
- Data Enrichment Services: Identify, rate, and qualify your best prospects

Email resupport@blackbaud.com or call 800.468.8996 for assistance.

Blackbaud.

More Questions?

For more information:

Contact your account manager

Phone: 800-443-9441

Email:

solutions@blackbaud.com

Thank You for joining us!

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