Release Notes: October 2014

Before you begin to use Target Analytics ResearchPoint, take a moment to review the following notes. It is important to share this information with all Target Analytics ResearchPoint users in your organization.

Open Data Protocol (OData)

You can now use Open Data Protocol to consume, share, and manipulate data you query from *ResearchPoint*.

OData is a data access protocol designed to provide standard access. This format can then be consumed by other programs, allowing you to further segment, manipulate, and create visual representations of the data.

Before you begin to use OData in the Information Library, you need to complete one configuration step. To learn how, review the Open Data Protocol Configuration Tip Sheet.

After configuration, when you create a query in *ResearchPoint*, you can now access the data from that query in OData format. On the Information Library page, expand the query you want to use and click **Get OData Link**. Then, use *Microsoft Excel 2010*, *Microsoft Excel 2013*, or *Tableau* to pull in the data and design your custom spreadsheet and data visualization projects.

Once the OData is in *Excel* or *Tableau*, you can share dashboards and charts with any user, regardless of their *ResearchPoint* permissions. However, any data refreshes do respect the user's security permissions. When users set up the OData in *Excel* or *Tableau*, they enter their *ResearchPoint* credentials. Based on these credentials, data refreshes happen only for those with the appropriate security permissions.

For more information, see Open Data Protocol on page 5.

Target Analytics Prospecting Database Updates

We recently made updates to our data that will help you with year-end fundraising.

NOZA

We are excited to announce that our NOZA database of charitable giving has surpassed the 100 Million gift mark! Now is the time to run your searches and look across all 100+ million gifts!

Our most recent NOZA data update was on October 14, 2014.

> **Tip:** NOZA is the world's largest searchable database of philanthropic data. NOZA's data is comprised of detailed charitable donation information that has been collected from publicly-available Internet locations.

FEC

Have you been wanting to complete some historical political research? The most recent FEC data

updates take you back in time with additional gift searches tracing back from 1980-1995. This additional date range brings the FEC donation count to over 23 million gifts!

Tip: Federal Elections Campaign data is provided by the Internal Revenue Service (IRS) and contains information on election and political campaign contributions to identify political affiliations and business giving to PACs and political campaigns.

Dun & Bradstreet

Finally, with all the individual donor updates we cannot forget about business ownership. Dun and Bradstreet has added new businesses and cleaned the data resulting in fewer duplicates and data errors. When you wealth screen a prospect, you now have over 22 million records from D&B that can be searched.

Tip: Dun & Bradstreet is the world's leading source of commercial information and insight on businesses to identify business ownership, equity, and leadership positions in public and private companies.

Batch and Import Guide Enhancements

With this release, we made an investment in improving the quality of our existing Batch and Import documentation.
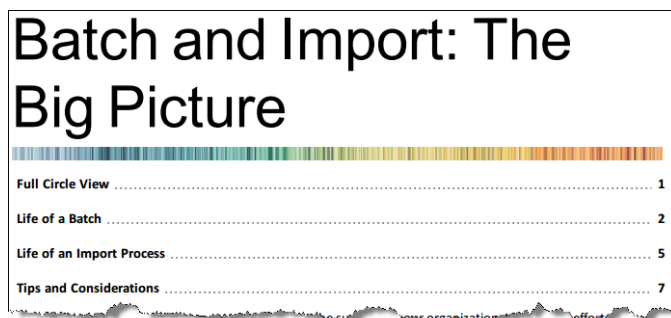
Review the Highlights

- We tested and updated content to ensure accuracy and provide a more logical flow of information.
- We created new How-To videos to visually enhance your understanding of *Batch* and *Import*.

  Watch this video for a high-level overview of Batch.
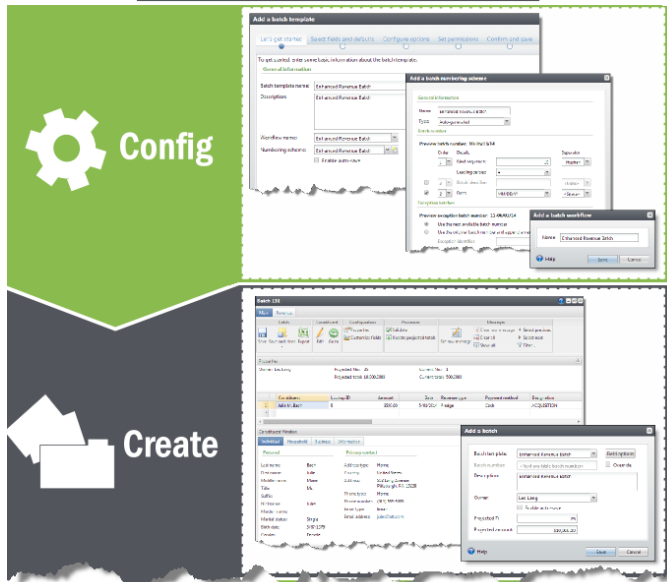
  Watch this video for a high-level overview of Import.

- We updated the Batch and Import Guide on the ResearchPoint How-to Documentation page. We added a new "Big Picture" chapter that offers an overview of *Batch* and *Import*, and describes how they work together to save time and promote consistent data management.

  This chapter also illustrates the life cycle of a batch and import process, and provides tips and considerations to enhance your workflow.

Workflow - Life of a Batch

To help you more clearly understand the validation process, we added more detail to our list of validation errors and the reasons for their occurrence.

Batch Validation

Batch validation helps your data remain consistent and error-free.

Validation occurs at different times during data entry. When you enter batches manually in **Batch entry**, the program flags simple errors as you enter data and more complex errors once you save the batch. To initiate validation at any point during data entry, click **Validate** on the toolbar of the data entry screen. When committing a batch, on the Commit parameters screen, you can also select **Validate batch before committing**.

The list below includes examples of validation errors and their solutions:

Missing required fields

For missing required fields, ensure the field is populated. In other cases, you may need to deselect the field as required when customizing fields for the batch. For more information, see Customize the Fields in a Batch on page 70.

Incorrectly formatted fields

When incorrectly formatted fields exist, a red X appears in your batch data entry row. A common formatting error is an incorrect email address.

Duplicate constituents

Ensure duplicate constituents do not exist in your database. For more information, see Resolve Duplicate Constituents in a Batch on page 118.
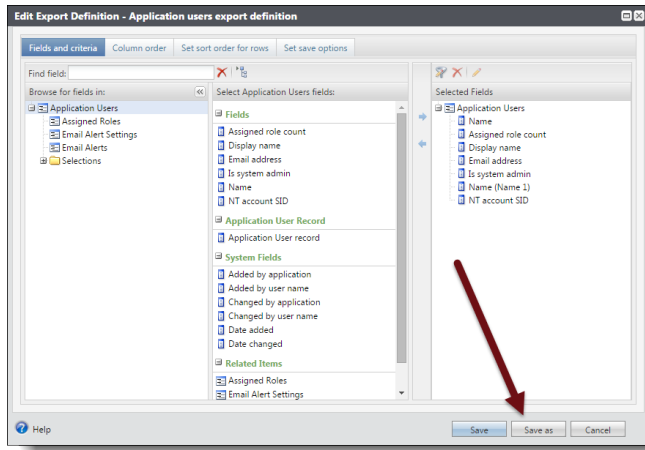
Post an Idea or Question to the Target Analytics Community from the Help Panel

We know that when you're busy researching a prospect, it may not be a convenient to navigate to the Target Analytics Community and ask your question or post an idea for how to improve the product. Now, when you click **Ask the Community** at the top of the help panel, we'll load a page for you to submit your question or idea from within the help panel so you can quickly get back to work. If you see something you want to investigate, you can still take a break from *ResearchPoint* and head to the community to interact with peers, Blackbaud experts, and your ResearchPoint product development team.

Save As Option for Export Definitions

A new **Save as** option is available when you create and edit export definitions on the Export definitions page in *Administration*. This enables you to change existing export definitions while they are open and save them as new definitions. Previously, you copied definitions to create new

versions of them. This enhancement reduces the number of steps to update existing definitions so you can work more efficiently.

Location of the Wealth and Ratings Record's History Moved

To make it easier for you to see a history of actions for a prospect's wealth and ratings record, we moved the **History** link from the explorer bar to a tab under the Biographical Information tab. From the History tab, just as you could before, you can set parameters and view a history report for the prospect.

ResearchPoint Feedback

Do you want to influence the direction of the product? You can in the new Target Analytics Community. We're there with you in the community and we're listening for which features you want added or which existing functionality needs to beimproved.

You can add a new idea or respond to an existing idea with your specific details. The more you tell us, the better we can prioritize and design the product around your organization's needs.
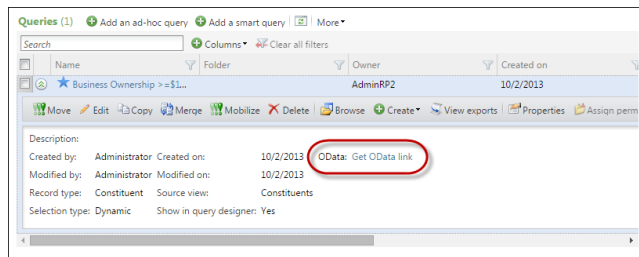
To let us know which ideas are most important to you, open the Idea and click **Like**. If you have feedback on how we should implement the request, please leave a comment with your specific needs. Ideas with the most likes are more heavily favored when we consider which ideas to implement.

To see all the current user-posted ideas, from the Target Analytics Community home page, under **Conversations**, on the gray bar click **Ideas**. We look forward to hearing from you on how you need **ResearchPoint** improved!
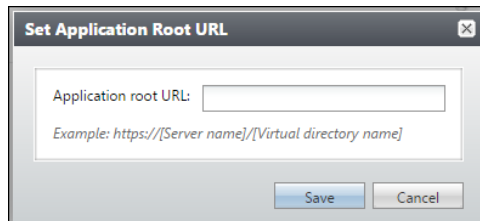
Open Data Protocol

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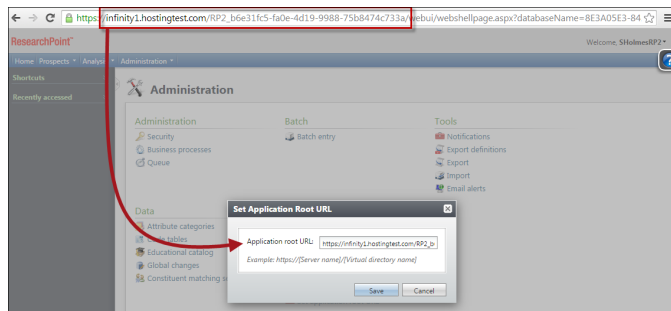

Set Up OData Connection

Before you can use OData, you must set your application root URL. From *Administration*, under **Configuration**, click **Set application root URL**.

The root URL must be in this format: https://[Server name]/[Virtual directory name]. You can find your root URL in the browser address bar when you are logged into **ResearchPoint**. The portion of the URL before /webui is your root URL. It will be similar to the example shown below.

OData in Microsoft Excel 2010

In *Microsoft Excel 2010*, you can generate pivot tables using the OData information.

1. From the PowerPivot ribbon, click **PowerPivot Window**.
2. On the PowerPivot screen, click **From Data Feeds** under Get External Data.
3. In the **Friendly connection name** field, enter a descriptive name for your data feed, such as "ResearchPoint."
4. In the **Data feed URL** field, paste the URL you got from your query in *ResearchPoint*.
5. Click **Advanced**. On this screen, enter your ResearchPoint user name and password and click **OK**.
6. Click **Next**, and select ODataQuery.ashx as the source table.
7. Click **Finish.**
8. Once the import is complete, click **Close**. You can now manipulate and explore your data in the power pivot.

OData in Microsoft Excel 2013

In *Microsoft Excel 2013*, you can create power views using the OData information.

1. From the Data tab, select **From Other Sources/From OData Data Feed**.
2. Click **Next**.
3. Check the "ODataQuery.ashx" checkbox.
4. Click **Next**.
5. You can enter a description and change the name if you prefer.
6. Click **Finish**, and then click **OK** to import the data.
7. On the Import Data screen, select "Power View" and click **OK**. You can now use *Excel* to create charts and dashboards of your data.

OData in Tableau

In *Tableau*, you can create dashboard using the OData information.

1. From *Data*, click **Connect to Data**.
2. Select "OData."
3. In the **Select or enter a URL** field, paste the URL from your query.
4. On Step 2, select **Use a Username or Password** and enter your *ResearchPoint* credentials.
5. On Step 3, click **Connect**.
6. On Step 4, enter a name for the feed.
7. Click **OK**.