

The**Raiser's**Edge[®]

The**Education**Edge[™]

Integration Planning Guide

060409

©2008 Blackbaud, Inc. This publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic, or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without the prior written permission of Blackbaud, Inc.

The information in this manual has been carefully checked and is believed to be accurate. Blackbaud, Inc., assumes no responsibility for any inaccuracies, errors, or omissions in this manual. In no event will Blackbaud, Inc., be liable for direct, indirect, special, incidental, or consequential damages resulting from any defect or omission in this manual, even if advised of the possibility of damages.

In the interest of continuing product development, Blackbaud, Inc., reserves the right to make improvements in this manual and the products it describes at any time, without notice or obligation.

All Blackbaud product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc.

All other products and company names mentioned herein are trademarks of their respective holder.

RE/EE-IntegrationPlanningGuide-060409

The Raiser's Edge and The Education Edge Integration Planning Guide

THE RAISER'S EDGE AND THE EDUCATION EDGE INTEGRATION	
PLANNING	1
Integration Planning Checklist	2
Field Mapping	22
INDEX	25


Contents

The Raiser's Edge and The Education Edge Integration Planning

Contents

Integration Planning Checklist	2
Appoint the Integration Administrator	3
Confirm Version and System Requirements	3
Form Integration Committee	4
Remove Duplicate Records	8
Merge Nonconstituent Relationships	18
Determine the Source Database	21
Plan for Security	22
Unlock Integration	22
Field Mapping	22

Chapter 1

 Before reading this guide, you should have completely set up the programs you plan to use (*Admissions Office*, *Registrar's Office*, and *Student Billing*) in the database you plan to integrate with *The Raiser's Edge*.

With integration, you can link records between *The Education Edge* and *The Raiser's Edge* and synchronize data on the records. Integration saves data entry time and ensures the consistency of your data.

In *The Education Edge*, you can have *Admissions Office*, *Registrar's Office*, and *Student Billing* in the same database, sharing records. For more information about considerations for shared information among these programs, see *Integrating Student Billing with The Education Edge*. Before planning your integration with *The Raiser's Edge*, you should have completely set up the programs you plan to use in the database you plan to integrate with *The Raiser's Edge*.

If you have *Student Billing*, but not *Admissions Office* or *Registrar's Office*, your program is named *The Financial Edge*. But for the purposes of this guide we will refer to the database you can integrate with *The Raiser's Edge* as *The Education Edge*.

Integration Planning Checklist

Follow this checklist to prepare for integration. The time it takes to prepare for integration varies from school to school, but it is necessary to thoroughly complete this checklist before integrating the databases. Each step is vital to planning for a successful integration.

- Select an integration administrator with both technical and records management knowledge to lead the integration committee. For more information about this step, see “Appoint the Integration Administrator” on page 3.
- Confirm you have the correct versions of the programs and review the system recommendations on our Web site. For more information about this step, see “Confirm Version and System Requirements” on page 3.
- Form an integration committee with representatives from the admissions office, registrar's office, business office, and development office. The integration committee is vital to planning for integration and ensuring the ongoing success of the integration. For more information about this step, see “Form Integration Committee” on page 4.

The integration committee should make the following decisions when planning for integration:

- Evaluate and resolve differences in data entry practices among the offices. For more information about this step, see “Align Data Entry Practices” on page 4.
- Decide which record types to map between the databases, for example, will students added in *The Education Edge* also be added to *The Raiser's Edge* as constituents? For more information about this step, see “Determine Record Types to Map” on page 4.
- Decide the fields to map between the databases. For more information about this step, see “Determine Fields to Map” on page 5.
- Evaluate differences in table entries used in each database and standardize the table entries for the fields you plan to map. For more information about this step, see “Standardize Table Entries” on page 6.

- Determine the default constituent codes to use for records added to *The Raiser's Edge* from *The Education Edge*. For more information about this step, see "Determine Default Constituent Codes" on page 7.
- Remove duplicate records in each database. For more information about this step, see "Remove Duplicate Records" on page 8.
- In *The Raiser's Edge*, you should remove duplicate relationship records that may exist from versions prior to 7.8, before nonconstituent relationships could be shared. For more information about this step, see "Merge Nonconstituent Relationships" on page 18.
- Determine which database is the most accurate, complete, and up-to-date. For more information about this step, see "Determine the Source Database" on page 21.
- To ensure both your databases are always updated with the latest record information, plan to set up synchronization immediately following the linking process. Then, schedule the synchronization process to run automatically at an interval of every 15 minutes. We also recommend you perform frequent, complete backups of your databases using a proper tape backup system. However, when you do not have such a system in place, you can run backup using the existing Blackbaud Management Console. For detailed instructions on how to back up your database, see the *Update Guide*.
- When you have completely prepared for integration, contact us to receive an unlock code to turn on the integration features in the programs. You must unlock integration in *The Education Edge* on a workstation with both *The Raiser's Edge* and *The Education Edge* installed. For more information about this step, see "Unlock Integration" on page 22.

Appoint the Integration Administrator

Select an administrator with a technical background and strong knowledge of records in *Admissions Office*, *Registrar's Office*, *Student Billing*, and *The Raiser's Edge*.

The administrator needs the authority to make decisions and the time to commit to the implementation process. The administrator works closely with a representative from each office as part of an integration committee.

Confirm Version and System Requirements

The versions required for integration are *The Raiser's Edge 7.83* or higher, and *The Education Edge* or *The Financial Edge 7.75* or higher. Please note you must be on the latest patch before integrating the systems.

To use integration, both programs must be installed on the same workstation so they can communicate in the background, but you do not have to be logged into both. We recommend you dedicate a workstation for the integration process of automatically synchronizing data.

Visit www.blackbaud.com for the latest system recommendations.

Form Integration Committee

Assign a representative from each office (admissions, registrar's, business, and development) to serve on the integration committee. A resource from each office is important because communication among departments is vital to prepare for and implement integration. Representatives must be familiar with data entry practices in the database they use. They must be able to attend the committee meetings and to communicate and enforce the decisions of the committee in their offices.

The committee meets to make decisions regarding implementing integration, then continues to meet weekly or biweekly after integration is set up to ensure the ongoing commitment of each department to the success of the project.

The committee is responsible for:

- Aligning data entry practices.
- Determining record types to map.
- Determining fields to map.
- Standardizing table entries.
- Determining default constituent codes.

Align Data Entry Practices

The integration committee should evaluate and resolve differences in data entry practices among the offices. Common differences include addresses, nicknames or legal names, and fields used in nonstandard ways.

Address entry. The integration committee should define conventions for entering address information. For example, the integration process may not link addresses if one office enters one-line street addresses while another office enters multiple-line street addresses, or one office designates apartment numbers with the pound sign (#) and another office identifies apartment numbers with the word Apartment or the abbreviation No.

Nickname or legal name. The integration committee should define a manner for entering first names. For example, one office enters legal names as first names and another office enters nicknames as first names. The integration process may not match these records if matching criteria includes characters of the first name.

Fields used in nonstandard ways. The integration committee should identify fields used in nonstandard ways in each database to prevent transferring irrelevant information or losing information. For example, if the registrar's office stores student reading group information in the **Nickname** field, mapping the **Nickname** field among databases can result in records with incorrect nicknames in *The Raiser's Edge* or the loss of reading group information in *Registrar's Office*.

Determine Record Types to Map

The integration committee should decide how to map record types between the databases. Establish your processes for when applicants, students, their relations, and faculty/staff become constituents in *The Raiser's Edge*. For example, are both parents and students added as constituents upon acceptance? Or are parents added as constituents and students as relations, and then the students become constituents upon graduation?



When configuring integration, you will specify the criteria for when records in *The Education Edge* become records in *The Raiser's Edge*. These are the questions you will have to answer:

- Will applicants become constituents in *The Raiser's Edge*? If so, based upon which current grades and statuses?

Will applicants' personal relationships become relationships in *The Raiser's Edge*? If so, based up on which relationship types and applicant statuses? Do you want to include emergency contacts only? Do you want to include relations only if the applicant lives with them?

- Will applicants' relations become constituents in *The Raiser's Edge*? Based upon which relationship types and applicant statuses? Do you want to include emergency contacts only? Do you want to include relations only if the applicant lives with them? Do you want to add spouses of relations as constituents?
- Do you want applicants to be relations on constituent records? If so, based up on which relationship types and applicant statuses?
- Will students become constituents in *The Raiser's Edge*? If so, based upon which current grades, statuses, and schools?

Will students' personal relationships become relationships in *The Raiser's Edge*? If so, based up on which relationship types and student statuses? Do you want to include emergency contacts only? Do you want to include relations only if the student lives with them?

- Will students' relations become constituents in *The Raiser's Edge*? If so, based upon which relationship types, student statuses, and schools? Do you want to include emergency contacts only? Do you want to include relations only if the student lives with them? Do you want to add spouses of relations as constituents?
- Do you want students to be relations on constituent records? If so, based up on which relationship types, student statuses, and schools?
- Will faculty/staff become constituents in *The Raiser's Edge*? If so, based upon which schools, departments, and statuses? Do you want to include current teachers only?


Will faculty/staff personal relationships become relationships in *The Raiser's Edge*? If so, based upon which relationship types?

Determine Fields to Map

The integration committee should determine the fields that will be synchronized, so the fields can be mapped when configuring integration.

We recommend you print and circulate the list of fields that can be mapped. For a list of the fields, see "Field Mapping" on page 22. The committee members should review the available fields with their respective offices to determine what fields are being used and how, and if there are any fields they do not want to share. The committee should reconvene to discuss which fields they want to share and whether they are using any of those fields differently.

If you make a mapped field required in one database, you should also make the field required in the other database. If you have a required field that is not mapped, you should establish a process to complete those required fields on records added through integration on a regular basis. For example, if the **Target** field is required on constituent records in *The Raiser's Edge*, you can create a query to find the constituent records added within a date range, then update the **Target** field on these records either manually or with a global change.

 It is important to decide the fields to map before linking records, especially addresses and phones.

You should be confident in the fields you map prior to linking records. After records are linked, if you change a field to be mapped or unmapped, the program recognizes the change the next time you synchronize data. However, in the case of addresses and phones, you could end up with duplicate addresses and phones if you linked records before mapping addresses and phones. If you later decide to map addresses and phones, the addresses and phones will not be matched because the records are already linked.

Standardize Table Entries

The integration committee should evaluate differences in table entries in each database and standardize the table entries for any lookup fields you plan to map for integration:

Lookup Field	Table in The Education Edge	Table in The Raiser's Edge
Addresses: Address Type	Address Type	Address Types
Addresses: Country	Country (see International page in <i>Configuration</i>)	Country (see International page in <i>Configuration</i>)
Addresses: State	State	States
Phones: Contact Type	Phone Type	Phone Types
Addresses: County	County	Counties
Addresses: Region	Region	Region
Ethnicity	Ethnicity	Ethnicities
Marital Status	Marital Status	Marital Status
Relationship	Relationship	Relationships
Religion	Religion	Religion
Suffix 1	Suffix	Suffixes
Suffix 2	Suffix	Suffixes
Title 1	Title	Titles
Title 2	Title	Titles
Status (On applications/enrollments in <i>The Education Edge</i> and primary education in <i>The Raiser's Edge</i>)	Student/Applicant Status	Education Status

Table entries for mapped fields are synchronized between the databases. If table entries are different on a record, when linking a record, the entry from *The Education Edge* is used.

All information for each table entry should be the same in both databases. Be aware that this includes the **Inactive** checkbox. For the phone type tables, this also includes **Do not share phone numbers of this type**, **Phone number type**, and **Phone number format**. Synchronization keeps all of these synchronized with the exception of the phone number format, though we recommend you standardize the phone number format to use in both databases.

We recommend you print copies of each table's entries and distribute the copies to the members of the committee for review. To print lists of table entries in a program, go to the Tables page in *Configuration*, then select **File, Print, Code Tables Report**. To compare table entries in one *Excel* worksheet, you can export the Code Table Report to an *Excel* format.

Decide the entries all departments will use. If you do not standardize table entries before you link records, each database will have tables with redundant entries. For example, if the **Phone Types** table in *The Education Edge* includes Beeper and the **Phone Types** table in *The Raiser's Edge* includes Pager, select a preferred term.

To standardize table entries, you can edit the entries on the Tables page in *Configuration*. You can manually edit the entries or use the Table Cleanup utility to replace duplicate table entries. For more information about the Tables page, see the *Configuration Guide* for the program.

After you have standardized your table entries in the program, to keep entries consistent, it is extremely important that you limit rights to edit table entries. Rights to code tables are controlled in security groups in *Administration*. Allowing only a few key users rights to change code tables ensures the validity of your data.

Education Edge conversion affecting phone and address types. If you converted from *Education Administration 6* to *The Education Edge*, you may have a phone or address type of "Unknown" that was created for blank phone or address types during conversion. To prevent the integration process from adding phone and address types with the prefix "Unknown" to your *Raiser's Edge* database, confirm you have edited phone and address types assigned in *The Education Edge* to remove the prefix "Unknown".

Raiser's Edge conversion affecting phone and address types. If you converted from *The Raiser's Edge 6* to *The Raiser's Edge 7*, you may have a phone or address type of "RE7 Conversion". To prevent the integration process from adding phone and address types with the prefix "RE7 Conversion" to your *Education Edge* database, confirm you have edited phone and address types assigned in *The Raiser's Edge 7* to remove the prefix "RE7 Conversion".

Determine Default Constituent Codes

When setting up integration, you specify the default constituent codes to use for records added from *The Education Edge* to *The Raiser's Edge*. The integration committee should decide on the constituent codes to use when each of these record types is added to *The Raiser's Edge*:

- Applicant
- Student
- Applicant Relation (each relationship type can have a different constituent code)
- Student Relation (each relationship type can have a different constituent code)



It is important to implement security for editing table entries.



A constituent code defines the relationship a constituent has with your organization. In other words, a constituent code tells you why the individual is in your database. Examples of constituent codes include Board Member, Alumnus, Trustee, Current Parent, or Friend.

- Faculty/Staff

For more information about constituent codes, see the *Constituent Data Entry Guide* for *The Raiser's Edge*.

Remove Duplicate Records

To prevent the integration process from linking records incorrectly or finding multiple matches for records, you should identify and remove duplicate records from each database.

In *Admissions Office*, *Registrar's Office*, and *Student Billing*, you can click **Search for duplicates** in *Administration* to find potential duplicate applicants, students, individuals, organizations, and faculty/staff. You can also click **Merge records** in *Administration* to search for duplicate records and merge duplicate records into primary records. For information about searching for and merging duplicate records in *The Education Edge*, see the *Administration Guide* for *The Education Edge*.

You can also search for duplicate addresses by running the Duplicate Addresses Report. Use this report to merge any duplicate addresses in each student/individual/organization record.

In *The Raiser's Edge*, you can click **Duplicate Constituents** in *Administration* to find potential duplicate constituents. You should merge each duplicate constituent record before you link records for integration purposes. For information about searching for and merging duplicate records in *The Raiser's Edge*, see the *Configuration & Security Guide* for *The Raiser's Edge*.


Remove Duplicate Addresses

To find duplicate addresses, you should run the Duplicate Addresses Report. You can find this report in the Directories and Lists area of *Reports* in *Admissions Office* and *Registrar's Office*. This report is also found in the Student/Individual/Organization area of *Reports* in *Student Billing*. Use this report to merge the duplicate addresses in each student/individual/organization record.

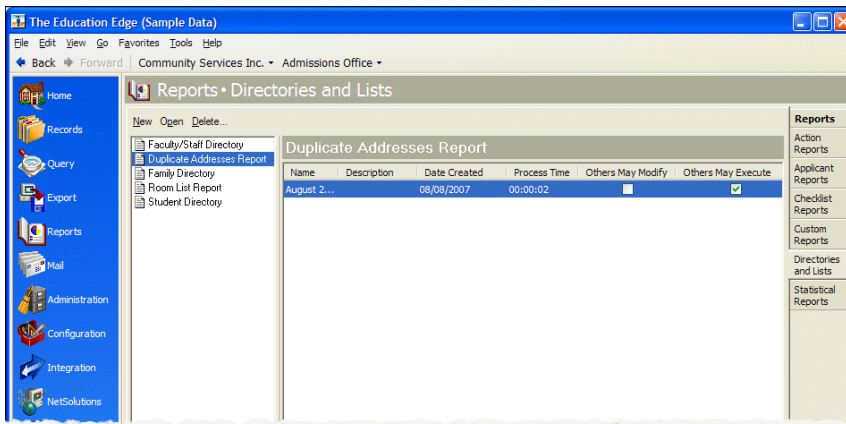
➤ Search for duplicate addresses

While this procedure explains how to search for duplicate addresses in *Admissions Office*, you can use the same steps in *Registrar's Office* and *Student Billing*.

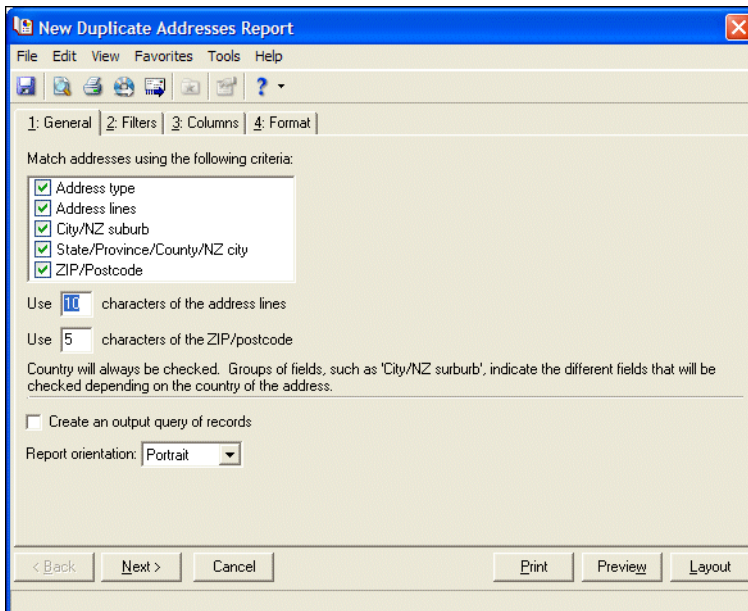
1. From the Reports page in Admissions Office, click **Directories and Lists**. The Directories and Lists page appears. A list related reports appear on the left.

 An action bar containing links for creating a new report, opening a report, and deleting a report appears above the list of reports. These links are common to all Reports pages.

- In the list on the left, select **Duplicate Addresses Report**.

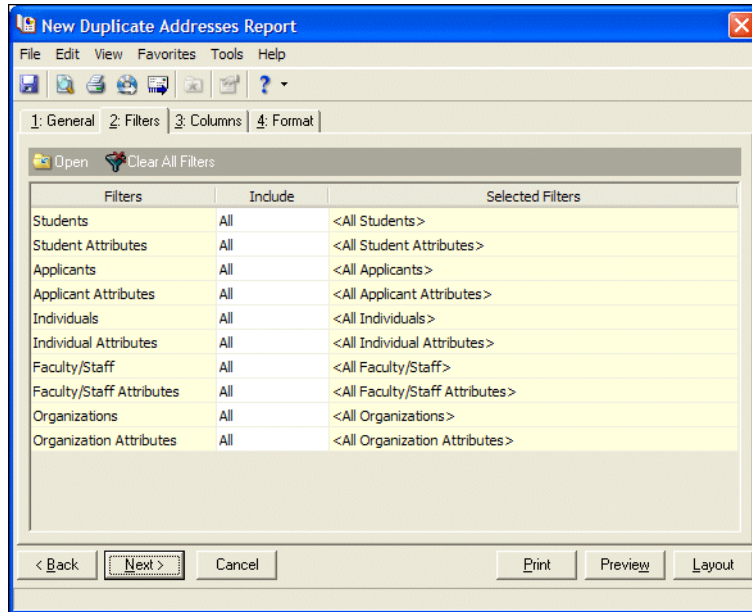


- On the action bar, click **New**. The New Duplicate Addresses Report screen opens on the General tab.

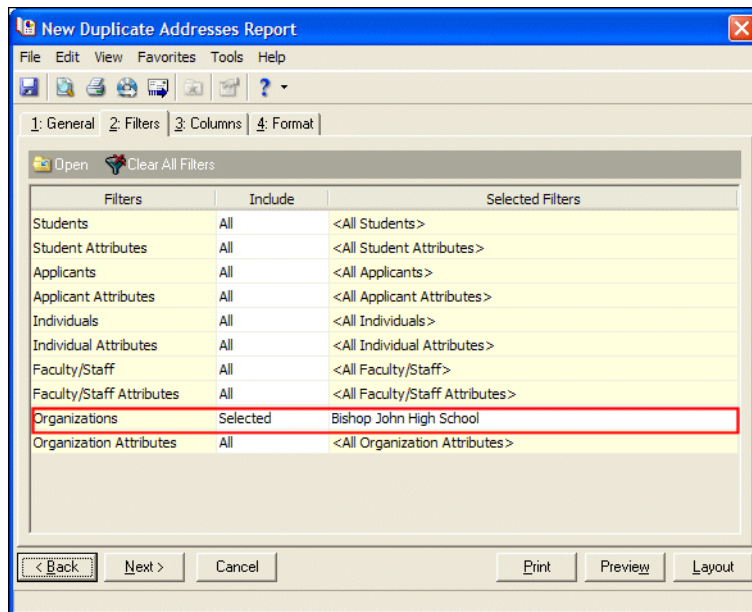


- In the **Match addresses using the following criteria** box, mark checkboxes for the address fields to check for duplicates.
- If you selected to check address lines, in **Use [] characters of the address lines**, enter the number of characters to check in the address lines for duplicates.
- If you selected to check the ZIP/postcode, in the **Use [] characters of the ZIP/postcode**, enter the number of characters to check in the ZIP/postcode for duplicates.
- To create an output query of duplicate records included in the processing, mark **Create an output query of records**.

8. Click **Next** or select the Filters tab.



9. To include only specific records in the report, make filtering selections. For more information about filtering, see the Program Basics chapter of the *Program Basics Guide*.



10. When you finish selecting filters, click **Next** or select the Columns tab.

Field Name	Field Align	Heading	Heading Al...	Wrap Head...	Width	Wrap Field?
Record Name	Left	Record Name	Left	<input type="checkbox"/>	1.50	<input type="checkbox"/>
Record Type	Left	Record Type	Left	<input type="checkbox"/>	1.00	<input type="checkbox"/>
Primary Address?	Left	Primary?	Left	<input type="checkbox"/>	0.55	<input type="checkbox"/>
Address Type	Left	Address Type	Left	<input type="checkbox"/>	0.80	<input type="checkbox"/>
Address Lines	Left	Address Lines	Left	<input type="checkbox"/>	1.50	<input type="checkbox"/>
City	Left	City	Left	<input type="checkbox"/>	0.75	<input type="checkbox"/>
State	Left	State	Left	<input type="checkbox"/>	0.40	<input type="checkbox"/>
ZIP/Post Code	Left	ZIP	Left	<input type="checkbox"/>	0.75	<input type="checkbox"/>

Report Width: 7.75

11. In the grid, select and format the columns to appear in the Duplicate Addresses Report.
12. Click **Next** or select the Format tab.
13. From the list, select **Headings**. The heading defaults to “Duplicate Addresses Report” in the **Title** field. You can leave this as the title for the report or enter your own. In addition you can enter a subtitle for the report in the **Subtitle** field.

Headings

Heading Format

Title: Duplicate Addresses Report

Subtitle:

Align: Center

Print organization name in header

Print Page Number in Heading

Format: Page 1


Align: Right

Print Report Date in Heading

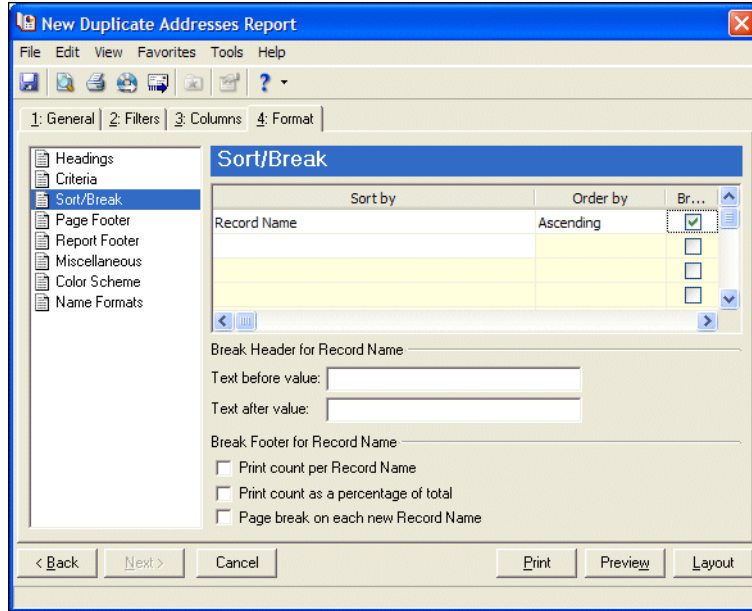
Format: Short Date and Time

Align: Left

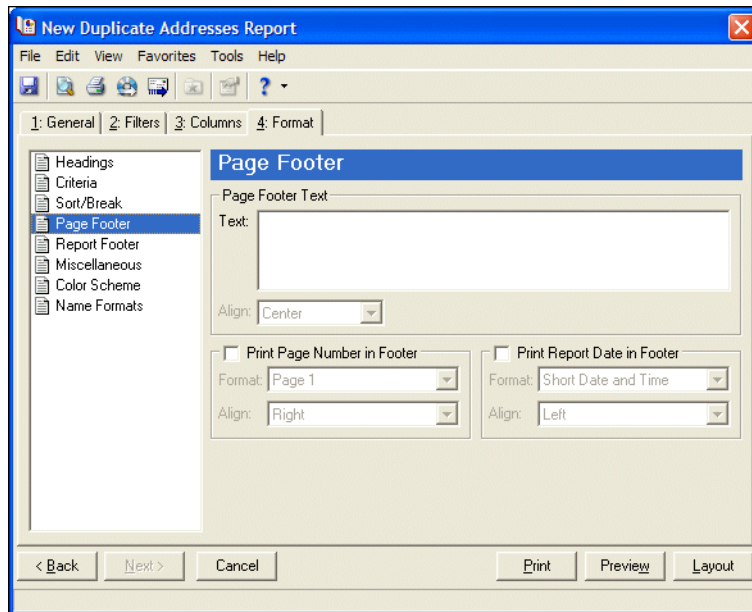
Print report heading on each page

 You also can sort by Record Addressee/Salutation and Record Type.

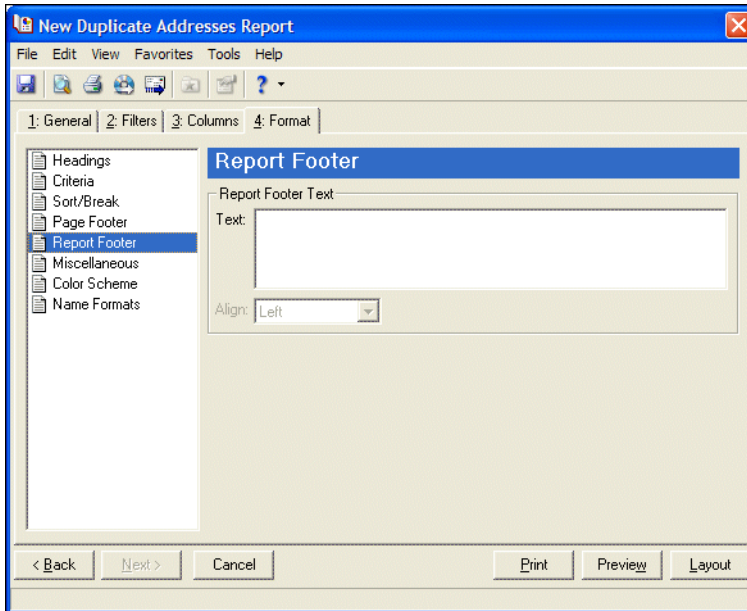
- Click **Sort/Break**. The Sort/Break panel appears. The report is set by default to sort in ascending order on a record name. That means applicants are sorted alphabetically within the report. Mark the **Break?** box to make a new section appear on the report.



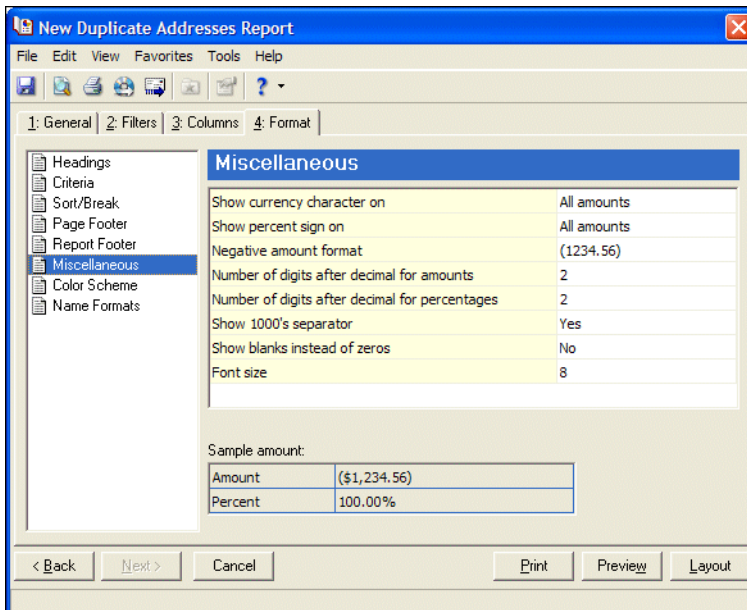
- Click **Page Footer**. The Page Footer panel appears. Enter up to 254 characters in the **Page Footer Text** box. You can include other text, such as the page number and date. The page footer is printed at the bottom of each page of the report.



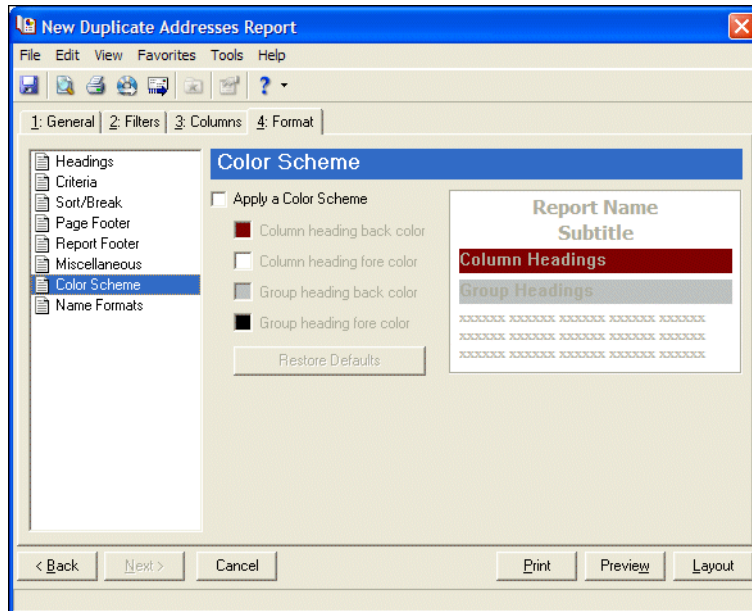
16. Click **Report Footer**. The Report Footer panel appears. Use the Report Footer to create a footer to appear at the bottom of the last page of the report. You can enter a minimum of 254 characters in the **Text** field for the report footer and select how to align the text.



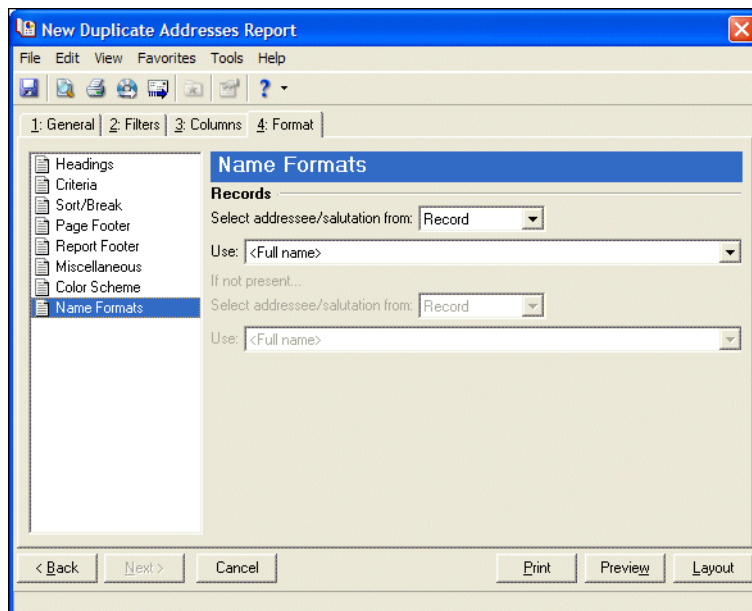
17. Click **Miscellaneous**. The Miscellaneous panel appears. Use this panel to specify how numbers appear on the report and set the font size. We recommend you leave the font size set to 8, as larger font sizes can cause text to be cut off.



- Click **Color Scheme**. The Color Scheme panel appears. Use Color Scheme to select colors for report headings. When you click in the color box next to the selection, the Color screen appears so you can select a standard color or define a custom color. If you leave the **Apply a Color Scheme** checkbox unmarked, the report prints in black and white.



- Click **Name Formats**. The Name Formats panel appears. You can select the name format for records.



- If you select Configuration in the **Select addressee/salutation from** field, the **Use** field contains name formats defined on the Addressee/Salutations page of Configuration.

- If you select “Record” in the **Select addressee/salutation from** field, the **Use** field contains the name formats “<Full name>”, “Primary addressee”, “Primary salutation”, and any defined addressee/salutation formats. These name formats are drawn from each record in the report. For example, if you select “Primary salutation”, the primary salutation defined on the Addresses/Salutations tab of an individual’s record is used in the report.

In the If not present....section of the panel, you can select a backup name format. The backup is used if a record does not contain the data specified by the primary name format. Selecting “<Full name>” in the **Use** field disables the If not present...section of the panel.

20. Click **Preview** to preview the report on the screen. A message appears indicating the program the report. The preview screen appears so you can preview the report.

Record Name	Record Type	Primary?	Address Type	Address Lines	City	State	ZIP
Mr. Greg Bronson	Individual	P	Home	38 Oak Avenue	Mt. Pleasant	SC	29464
	Individual		Home	38 Oak Avenue	Mt. Pleasant	SC	29464
Dr. Scott R. Brown	Individual	P	Business	1332 Lee Highway	Clemson	SC	22756
	Individual		Business	1332 Lee Highway	Clemson	SC	22756

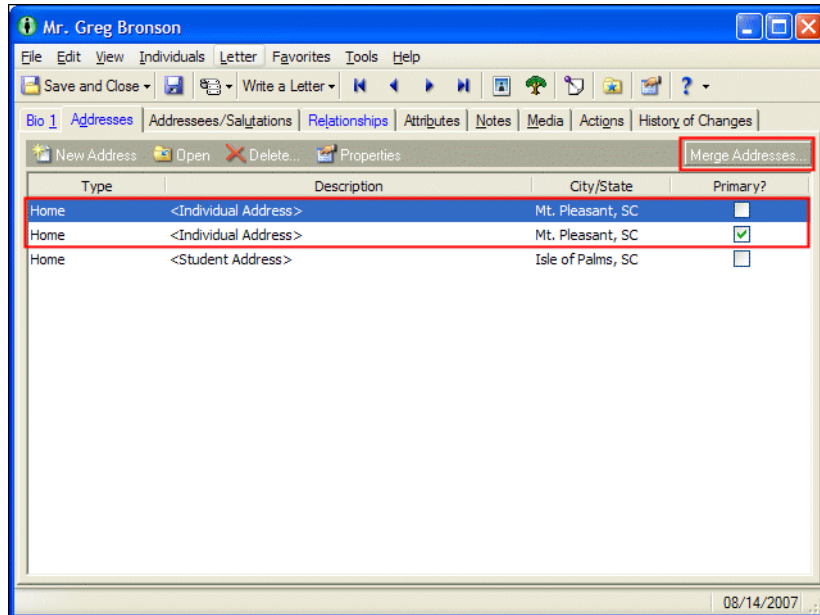
21. You can print the report from this screen by clicking the **Print** button on the toolbar.

➤ Merge duplicate addresses

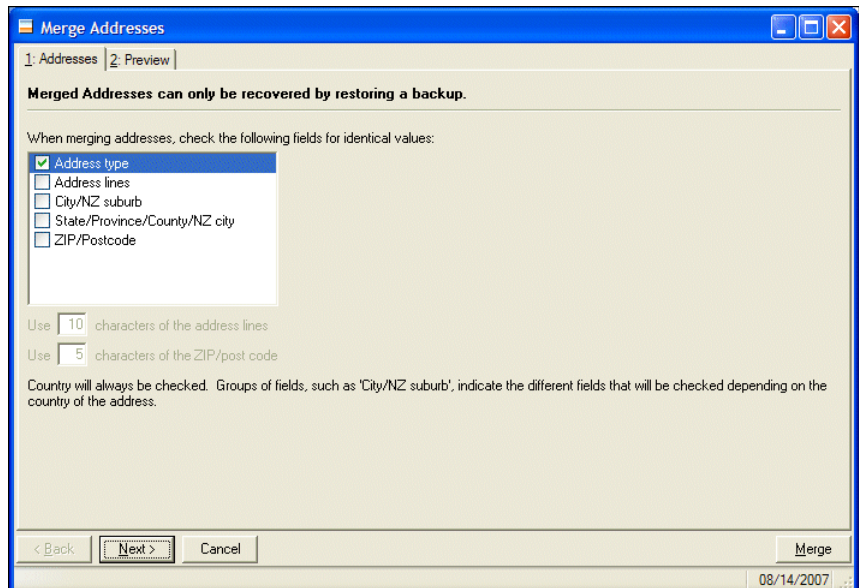
Once you have printed the Duplicate Addresses Report, you can open each record and merge the duplicate addresses from the Addresses tab of the individual, student, faculty/staff, and organization record. This procedure explains how to merge the duplicate addresses in an individual record in *Admissions Office*.

1. On the navigation bar, click **Records**. The Records page appears.
2. Click **Individuals**. The Individuals page appears.

3. In the **Search for an Individual by Individual name** field, enter the name of the person whose record you want to open. The individual record appears.
4. Press **ENTER** on the keyboard or click the binoculars. The individual record appears.

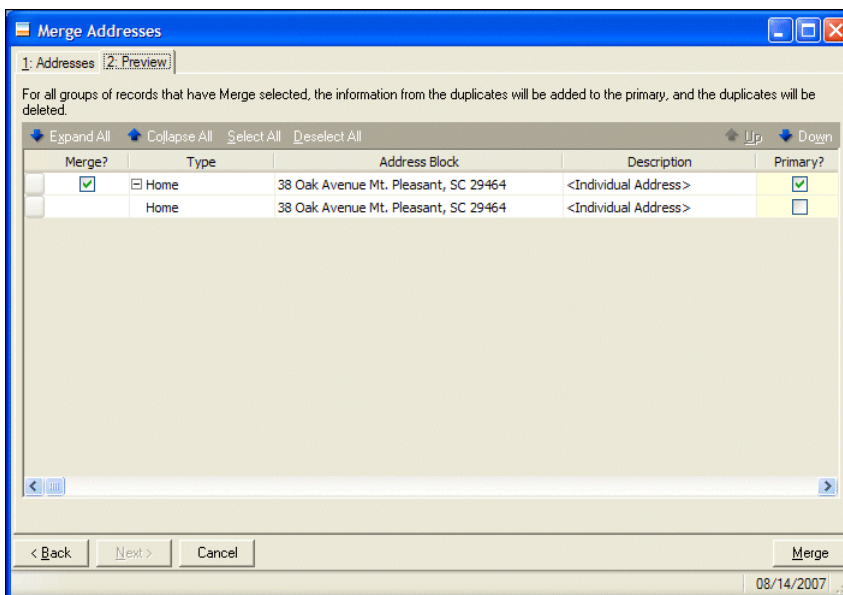


5. On the action bar, click **Merge Addresses...**. The Merge Addresses screen appears.



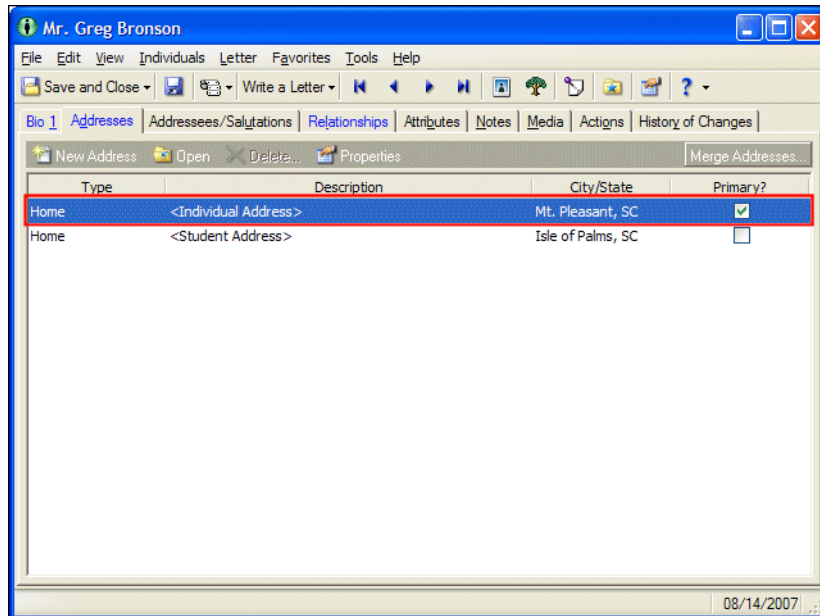
6. In the **When merging addresses, check the following fields for identical values** box, mark checkboxes for the address fields to check for duplicates.

7. If you selected to check address lines, in **Use [] characters of the address lines**, enter the number of characters to check in the address lines for duplicates.
8. If you selected to check the ZIP/postcode, in the **Use [] characters of the ZIP/postcode**, enter the number of characters to check in the ZIP/postcode for duplicates.
9. Click **Next** or select the Preview tab. The Preview tab displays the duplicate addresses based on your criteria.
10. The records listed are considered primary records. To expand all of the rows for the records, click **Expand All** on the action bar. The rows under a primary record are considered the duplicate records that will be merged with the primary record.




11. Review the duplicate addresses found to determine if they look like duplicates or if you need to adjust your criteria.
12. If you do not want to merge a record, unmark the checkbox in the **Merge?** column for the record.
13. When you are ready to begin the merge, click **Merge**.

14. When the merge is complete, you return to the Addresses tab of the individual record. The merged address appears in the grid as the primary address.



15. Click **Save and Close**.

 If you previously used *Academy Manager*, you should address all of the duplicate records in each database before accessing the Link Records screen for the first time.

If you previously used *Academy Manager*, it is very important that you address all of the duplicate records in each database before accessing the Link Records screen. When you first access the Link Records screen, the program automatically generates Academy matches. If you decide to merge records within a database after accessing the Link Records screen for the first time, you may lose some of your Academy matches.

Merge Nonconstituent Relationships

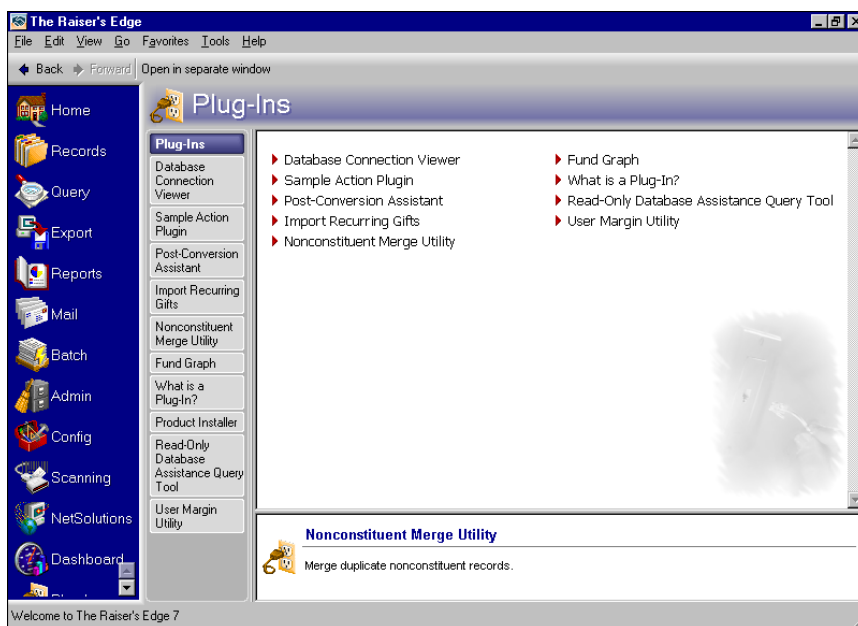
You should remove duplicate relationship records in the *Raiser's Edge* database. In *Raiser's Edge* versions prior to 7.71, nonconstituent relationships could not be shared. For example, John and Jane are constituents and their daughter Sally is a nonconstituent. One Sally record would be a relationship for John and another Sally record would be a relationship for Jane. The two Sally records were independent and not shared. In version 7.81, the nonconstituent Sally record can be shared.

In *Raiser's Edge 7.83* you can run a Nonconstituent Merge Utility to merge selected nonconstituent relationship records in your database and delete the source records.

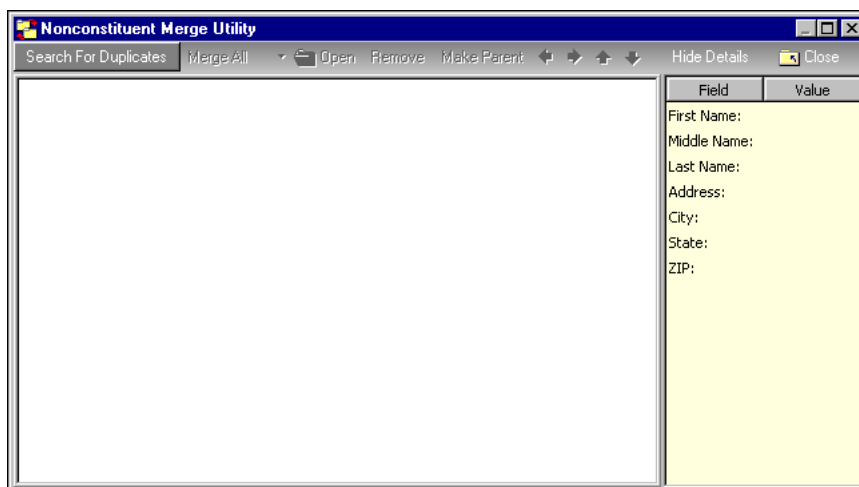
➤ Merging nonconstituent relationship records

You must have Administrator rights set up from the **Security** link of *Administration* to run the **Nonconstituent Merge Utility**.

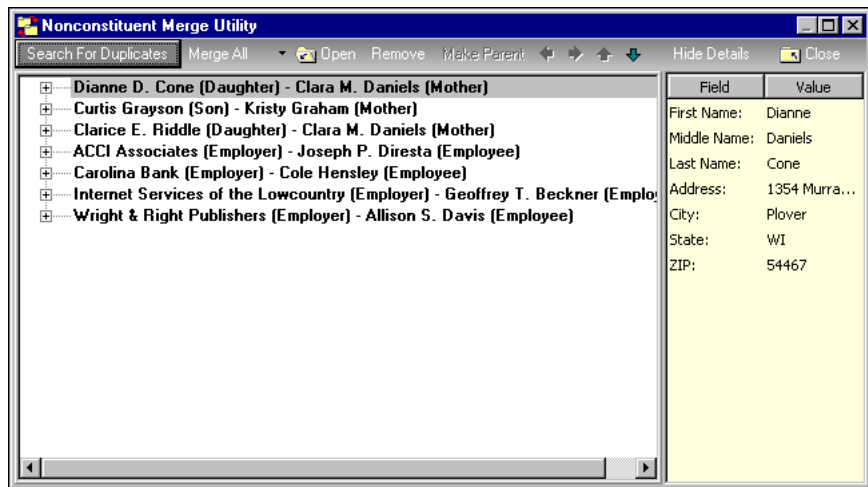
1. On the navigation bar in *The Raiser's Edge*, click **Plug-Ins**. The Plug-Ins page appears.




2. Click **Nonconstituent Merge Utility**. The Nonconstituent Merge Utility screen appears.

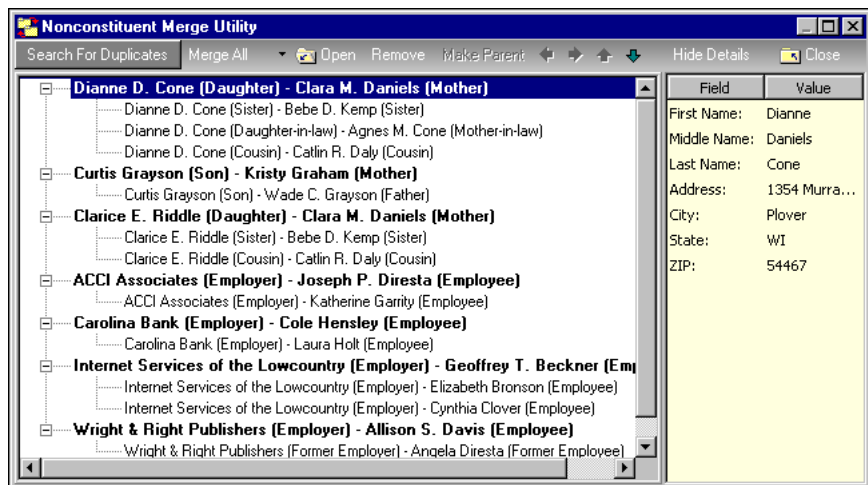


- To search your database for duplicate nonconstituent relationship records, click **Search For Duplicates** on the action bar. The records which have duplicates appear on the left.



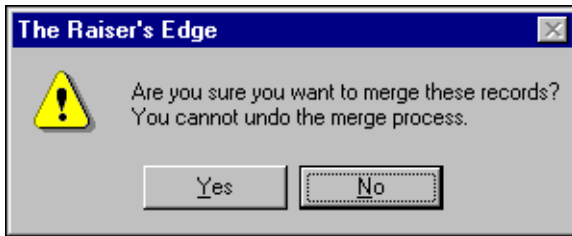
 Once you click **Search For Duplicates**, you can cancel the process at any time and merge only the relationships that appear on the screen thus far. You can run the process as many times as necessary to merge all nonconstituent relationship records.

- To expand each name to see detailed information about the duplicates, click the plus sign beside each name.



- To view details about each nonconstituent relationship record, select the record. Details from the nonconstituent relationship record appear on the right. If you do not want to show the box on the right, click **Hide Details** on the action bar. Only the records appear and no details.
- Once you view details, you may decide to use the arrows on the action bar to move records up or down in the tree view. To make a child relationship the parent relationship, select the child relationship and click **Make Parent** on the action bar. Once you click **Make Parent**, the child becomes the parent at the top of the list.
- To remove a relationship record from the list, select the record and click **Remove** on the action bar. When you remove a parent, the first child in the list moves up to the parent node. If you search for duplicates again, the record will reappear.


8. When you are ready to merge the nonconstituent relationship records, click **Merge All** on the action bar. A message appears, asking if you are sure you want to merge the records. Once merged, there is no undo.



9. To merge the records, click **Yes**.

Information is merged as follows:

- No fields in the parent (top) record are overwritten. Only empty fields are populated from the child records. Fields are populated in order of the tree view. Information from the first child record under the parent record is used. Information is used from each record in successive order.
 - Addresses are used as a whole. Address parts from child records are not used. If the parent's entire address is empty, then the address from the first child with an address is used.
 - Phone numbers are added unless a phone type already exists. The children's duplicate phone types are ignored.
 - Attributes are added unless an exact match exists or only one attribute of a particular type can be added.
 - Education records are added unless an exact match exists. Any empty fields on the education record are filled in using the child records with an exact match.
 - Business (organization) records are not merged unless the organization is an organization that is a constituent in your database. Only business records with matching constituent IDs are merged.
 - Any locked nonconstituent relationships are written to a control report.
10. Once the records are merged, the control report appears. To close the control report, click the red "X" in the top left corner. You return the Nonconstituent Merge Utility screen.
11. On the action bar, click **Close**. You return to the Plug-Ins page.

 You can also right-click on a node and select **Merge Node** from the menu that appears to merge only one particular group.

Determine the Source Database

The integration committee should discuss if there is one database that should be considered the source database, because it is the most accurate, complete, and up-to-date.

Keep in mind that when linking records, if there is a data conflict, you can select to show match details so you can resolve the conflict on an individual record basis, or automatically overwrite using data from *The Education Edge* or from *The Raiser's Edge*. (If you select to automatically overwrite data from one database to another when linking records, and a field is blank in one database but has a value in the other, the value will always be used. When synchronizing data, the value last changed is used, regardless of database.)

If you will be automatically overwriting data conflicts using *The Education Edge* when linking records, and you use the *Raiser's Edge* NCOA or CASS features, you should link records prior to running NCOA or CASS.

Plan for Security

You should determine which users will have access to Integration in each program.

At this time, you may also want to reevaluate the security rights of individual users considering which records will be linked. For example, if you are linking student records to constituent records, you may not want *Raiser's Edge* users to edit addresses for those students until they graduate. You can restrict those users from editing constituents with specific constituent codes using Security by Constituency options on their security group.

Also, because table entries for mapped fields are synchronized between the databases, you should also consider user rights to add, edit, and delete table entries.

For more information about security in *The Education Edge*, see the *Administration Guide for The Education Edge*. For more information about security in *The Raiser's Edge*, see the *Configuration & Security Guide for The Raiser's Edge*.

Unlock Integration

Once you are prepared to proceed with integration, you can contact your account manager to request it. After you receive the unlock code, you can activate the integration feature. You must unlock integration in *The Education Edge* on a workstation with both *The Raiser's Edge* and *The Education Edge* installed. The programs must be installed on the same workstation so they can communicate in the background, but you do not have to be logged into both. Once the integration feature is activated, the Integration page appears in your programs. For more information about the Integration page, see *The Raiser's Edge and The Education Edge Integration Guide*.

Field Mapping

This section provides the list of fields that can be mapped between *The Education Edge* and *The Raiser's Edge*. The integration committee can use these tables when determining what fields to map.

Fields Available for Mapping People in The Education Edge to People in The Raiser's Edge

This table lists the fields available for mapping people records. You can make notes about how each field is used in each program and whether to map the fields.

Field Name	Used in The Education Edge?	Used in The Raiser's Edge?	Map?
Addresses			
Birth date			
Deceased?			
Ethnicity			
First Name			
Gender			
Last Name			Required
Maiden Name			
Marital Status			
Middle Name			
Nickname			
Phones (available only if Addresses is selected)			
Relationship notes			
Religion			
SSN			
Suffix 1			
Suffix 2			
Title 1			
Title 2			

Fields Available for Mapping Applications/Enrollments in The Education Edge to Primary Education in The Raiser's Edge

This table lists the fields available for mapping application and enrollment records to primary education records. You can make notes about how each field is used in each program and whether to map the fields.

Field Name	Used in The Education Edge?	Used in The Raiser's Edge?	Map?
Class of			
Entered/Enroll date			
Date graduated			
Date left			
Status			

Fields Available for Mapping Primary Business in The Education Edge to Primary Business in The Raiser's Edge

This table lists the fields available for mapping primary business records. You can make notes about how each field is used in each program and whether to map the fields.

Field Name	Used in The Education Edge?	Used in The Raiser's Edge?	Map?
Addresses			
Contact type			
Contact?			
Organization name			Required
Phones (available only if Addresses is selected)			
Position			
Print position?			
Relationship notes			

Index

A

administrator, appointing 3

C

checklist, integration planning 2
committee, forming the integration 4
constituent code, choosing defaults 7

D

data entry practices 4
database, choosing the source 21
default constituent code 7
duplicates, removing 8

F

field mapping 5, 22
forming the integration committee 4

I

integration
 administrator, appointing 3
 aligning data entry practices 4
 committee, forming 4
 confirming version and system requirements 3
 determining
 default constituent codes 7
 fields to map 5
 source database 21
 determining record types to map 4
 merging nonconstituent relationships 18
 planning checklist 2
 removing duplicate records 8
 standardizing table entries 6
 unlocking 22

M

mapping
 choosing record types to map 4
 field 5, 22
merging nonconstituent relationships 18

N

nonconstituent relationships, merging 18

P

planning checklist 2

R

records, removing duplicates 8
relationships, merging nonconstituent 18
removing duplicate records 8
requirements, confirming 3

S

security planning 22
source database, choosing 21
standardizing table entries 6
system requirements, confirming 3

T

table entries, standardizing 6

U

unlocking integration 22

V

version and system requirements 3



corporate headquarters

Blackbaud, Inc.

2000 Daniel Island Drive
Charleston, SC 29492
USA

- ♦ Web www.blackbaud.com
- ♦ Phone 843.216.6200
- ♦ Fax 843.216.6100

support

Review the Customer Support Guide for information about our online resources and support procedures.

Download the Customer Support Guide from our

Web site's Support Overview.

<http://support.blackbaud.com>

documentation

We welcome your comments and suggestions about our user guides and help files. In the subject line of your email, please include the product name and version number.

documentationcomments@blackbaud.com

sales

Contact us for more information about our products and services.

- ♦ Email solutions@blackbaud.com
- ♦ Phone 800.443.9441
- ♦ Fax 843.216.6111

forms

Contact Blackbaud Forms to learn about preprinted material designed specifically for Blackbaud software. Learn more about our checks, Business and Development Office forms, membership cards, Patron Edge tickets, and more.

- ♦ Web <http://forms.blackbaud.com>
- ♦ Phone 866.422.3676

international contacts

Blackbaud Europe Ltd

11 York Road
London
SE1 7NX

- ♦ Phone +44 (0) 20 7921 9600
- ♦ Fax +44 (0) 20 7921 9601

38 Queen Street
Glasgow
G1 3DX
Scotland

- ♦ Phone +44 (0) 141 575 0000
- ♦ Fax +44 (0) 141 575 0999

- ♦ Web www.blackbaud.co.uk
- ♦ Email solutions@blackbaud.co.uk
admin@blackbaud.co.uk
support@blackbaud.co.uk

- ♦ Support (UK Local Rate)
0845 658 8500
- ♦ Support (From Outside UK)
+44 (0) 141 575 0801
- ♦ The Patron Edge Support (UK Local Rate)
0845 658 8580
- ♦ The Patron Edge Support (From Outside UK)
+44 (0) 20 7921 9600

Blackbaud Gift Aid

- ♦ Phone 01580 892235 (UK Local Rate)
+44 (0) 1580 892235 (From
Outside UK)

Blackbaud Pacific Pty Ltd.

ABN 73 095 925 170
Suite 4, 561-577 Harris Street
Ultimo NSW 2007
Australia

Mailing Address

PO Box K736
Haymarket NSW 1240
Australia

- ♦ Web www.blackbaud.com.au
- ♦ Email sales@blackbaud.com.au
support@blackbaud.com.au
administration@blackbaud.com.au
- ♦ Freecall 1800 688 910 Australia
0800 444 712 New Zealand
800 6162 205 Singapore
- ♦ Phone +61 2 9211 7366
- ♦ Fax +61 2 9211 7607

about Blackbaud

Blackbaud is the leading global provider of software and related services designed specifically for nonprofit organizations. Approximately 16,000 organizations use one or more of Blackbaud products and consulting services for fundraising, financial management, Web site management, school administration, and ticketing. Blackbaud's solutions include **The Raiser's Edge®**, **Team Approach®**, **The Financial Edge™**, **The Education Edge™**, **The Patron Edge®**, **Blackbaud®NetCommunity™**, **The Information Edge™**, **WealthPoint™**, **ProspectPoint™**, and **donorCentrics™**, as well as a wide range of consulting, analytical, and educational services. Founded in 1981, Blackbaud is headquartered in Charleston, South Carolina and has operations in Cambridge, Massachusetts; Toronto, Ontario; Glasgow, Scotland; London, England; and Sydney, Australia.

REV - 031507

© 2007, Blackbaud Inc.

This manual is for informational purposes only. Blackbaud makes no warranties, expressed or implied, in this summary. The information contained in this document represents the current view of Blackbaud, Inc., on the items discussed as of the date of this publication.

All Blackbaud product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc. The names of actual companies and products appearing herein may be the trademarks of their respective owners.