

The Education Edge 7.87 Patch 3

An Update to Contact Information for The Raiser's Edge Integration

Summary

Upcoming improvements to **The Raiser's Edge 7.94** mean that phone numbers and email addresses no longer are attached to specific addresses but instead live off **The Raiser's Edge** constituent record. In **The Raiser's Edge**, they made an improvement on the database level that separated physical addresses from contact information. All live directly off the constituent record now.

Important! If you **do not integrate** **The Raiser's Edge** with **The Education Edge**, nothing will change for how you use **The Education Edge**. You do not need to review the following information unless it interests you or you are considering integrating the two products. With this most recent patch to **The Education Edge**, we check to see if you integrate with **The Raiser's Edge** before any updates are made.

Why the update for The Raiser's Edge?

The Raiser's Edge 7.94 enhancements are based upon customer feedback, and therefore one of the most anticipated updates in recent times. The update to how contact information is stored on the constituent record is solving an important issue for **Raiser's Edge** customers.

Since the original release of **The Raiser's Edge**, contact information was required to live on a single address. At the time of the original release, this made sense as home and business landlines were the most common phone numbers people provided. Emails through your Internet Service Provider (ISP) were the norm and if you moved, these contact methods usually changed along with the address.

Today, as contact methods have evolved, our expectations and needs are different. Mobile phones dominate the phone market and cloud email services have replaced those provided by ISPs. When moving, these contact methods do not change and contact information should belong to the constituent and not an address.

This contact information change enables us to handle emails, phones, and links more appropriately on a database level while also saving users clicks in query and exports.

What does the update look like in The Raiser's Edge?

Contact information on the constituent record will remain on the Bio 1 tab right below the address. However, the contact information has its own grid, with types sectioned into their own tabs. With each type, you can set one as Primary, as well as mark them inactive when needed.

Contents

Why update Raiser's Edge?.....	1
RE Update Features.....	1
Raiser's Edge Migration.....	2
EE and RE Integration.....	2
Timeline.....	2
Whipple Hill Integration.....	3
OLA/ORE Integration.....	3
Important Steps after Update.....	3

Update Requirements

1. Before you update **The Education Edge** or **The Raiser's Edge**, run the integration sync.
2. Install **The Education Edge 7.87 patch 3** before you update **The Raiser's Edge**.
3. After **The Education Edge** is done updating, install **The Raiser's Edge 7.94** update.
4. Refer back to this tip sheet for tips on how to maintain good data health for contact information between **The Education Edge** and **The Raiser's Edge**.

We've updated the label for web address/URL to "Links" to better accommodate social media links as well as a constituent's personal website information.

Tip: Take a [visual walkthrough](#) of the changes!

Telephone Number		Email Address	Links	Fax Number	Other
DNC	Type	Link		Primary?	Inactive?
	Facebook	http://www.facebook.com/mercer.jenn		<input type="checkbox"/>	<input type="checkbox"/>
	Twitter	http://www.twitter.com/mercer_jenn		<input type="checkbox"/>	<input type="checkbox"/>
	LinkedIn	http://www.linkedin.com/in/jennifermercer		<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

Important! To ensure optimal data health between *The Raiser's Edge* and *The Education Edge*, we recommend you allow only one contact type per contact number or address. For example, we do not recommend you list two home phone numbers.

We also recommend the contact number or address be listed only once per constituent record and not allow duplicates. For example, do not enter a phone number as the business and home phone number.

How will data migration work for The Raiser's Edge Update?

1. In the upgrade process, contact information on the preferred address will be moved to the new fields and marked as active.
2. Contact information from alternate addresses will be moved to the new fields and marked as inactive.
3. Duplicate contact information will be matched on the number and type. Hyphens, parentheses, and spaces are ignored when trying to determine duplicates.
4. Nothing will automatically be marked as "Primary" during the migration. A plug-in will be available to globally mark certain phone types as "Primary."
5. Relationships will also receive this new behavior where the contact information no longer is attached to the relationship's address but on the relationship itself. In the case when the relationship is also a constituent, we will include the constituent's other contact methods (those from the constituent record and the reciprocal relationship) to quickly aid in finding the right contact method.

What does this mean for my Raiser's Edge integration with The Education Edge?

The changes to *The Raiser's Edge* also include removing the concept of phone sharing since this is also not a reflection of current constituent record needs. Therefore, for customers who integrate *The Raiser's Edge* with *The Education Edge*, we will also remove phone sharing for *Education Edge* records.

However, the ability to copy address information has not been removed. When addresses are copied between records in *The Education Edge*, the phone numbers will copy as well.

When will the change occur?

The Education Edge will release a patch to hosted customers on January 22, 2015 to prepare you for *The Raiser's Edge 7.94* release on January 25, 2015. If you do not host these applications with **Blackbaud Hosting**, the updates will be available from the [Blackbaud.com/downloads webpage](#) on January 26, 2015. It is important that you apply *The Education Edge* patch before you update *The Raiser's Edge*.

How does this affect the Connect Raiser's Edge for Whipple Hill?

While Whipple Hill products do enable phone sharing, the phone numbers are not tied to addresses and they do not allow duplicate phone types. The changes to *The Raiser's Edge* contact information has been designed to not create duplicates.

Are my Online Admissions and Reenrollment forms affected?

The changes to *The Raiser's Edge* contact information has also been designed to not affect your Online Admissions and Reenrollment forms.

What should I do after the software updates?

The most important recommendation we have after you update *The Education Edge* and then *The Raiser's Edge*, is to ensure you do not have duplicate phone numbers or email/web addresses. Data cleanup is always important so you are copying the most accurate information.

For the best data health between *The Education Edge* and *The Raiser's Edge*, we recommend that you allow only one number or address for each contact type for your constituents. If you have constituents with multiple numbers or addresses for a single contact type, the integration sync will still complete and everything but that contact information will copy. If a single contact type has multiple numbers or addresses associated with it, an error will appear in the integration activity report.

For example, if a constituent in *The Raiser's Edge* has multiple phone numbers listed as the "home phone number," the sync still completes fine but the home phone number will throw an exception to the report.

We also recommend that you allow constituents to have only one contact type to each phone number or address. Do not assign a phone number or email/web address to more than one type. For example, do not assign a constituent's mobile phone to the home and mobile phone type.

Important! We strongly recommend you review the integration activity report when you sync after the updates. The first time you sync after you update *The Education Edge 7.87* to *patch 3* and *The Raiser's Edge* to *7.94*, you are likely to have a longer list of exceptions in your integration activity report than normal.

Unfortunately, there is not an automated tool that can clean up the contact information in *The Raiser's Edge* for you because it takes careful consideration of each constituent's contact information. Instead, a person should review the contact information and make the best judgment about which number or address should be assigned to the contact type and ensure there are not multiple contact types assigned to a single phone number or address. An automated tool is not capable of calculating which mobile phone number is the best on a constituent record with multiple mobile phone numbers listed.

We regret that this may cause more manual updates of constituent records, but we'd rather enable you to update the records accurately than have us remove information you may need.

However, if you employ our data health best practices, each time you sync, you should have less errors on your integration activity report.

Tip: We recommend you run an integration sync before you update *The Education Edge* and *The Raiser's Edge*. Also, if you have contact information (phone numbers, email addresses, links) on alternate addresses that are valid and active, before you upgrade to *The Raiser's Edge 7.94*, you can move these to the preferred address; many of our customers already do this to see them on the Bio 1 tab.

➤ To learn more about The Education Edge How-to Documentation, visit: www.blackbaud.com/howto/education-edge .