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Online User Clinic:

Database Cleanup in The Raiser's Edge

Wednesday February 18, 2009

Hosted by:

Martin Burke
Solutions Engineer

Make the world a better place.

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Agenda



- Welcome and Introductions
- Blackbaud News and Updates
- Support Resources
- *Database Cleanup in Raiser's Edge* Presentation
- How Blackbaud Can Help
- Q & A
- Thank You!

Online User Clinics

- ♦ Mail Merge 3/18/2009 & 11/18/2009
- ♦ Query in The Raiser's Edge 7 4/15/2009
- ♦ Batch Entry & PCI Compliance 5/20/2009
- ♦ Action Tracks & Moves Management 6/17/2009
- ♦ Reporting in The Raiser's Edge 7 7/15/2009
- ♦ Homepage and Dashboards 8/19/2009
- ♦ Tracking Solicitors and Appeals 9/16/2009
- ♦ Importing 10/21/2009
- ♦ Security in The Raiser's Edge 12/16/2009

Web Seminar schedule:

www.blackbaud.com – Events, Web Seminars

Questions: please email webseminars@blackbaud.com.

Upcoming Web Seminars

- ♦ Intro to Basic Online Fundraising & Communication 3/4/2009
- ♦ Building and Managing an Interactive Website 3/5/2009
- ♦ Let's Go Paperless! PaperSave for The Raiser's Edge 3/17/2009
- ♦ Blackbaud NetCommunity Tour of Sites 3/12/2009
- ♦ Blackbaud NetCommunity for... throughout March
 - Cause-Based and Service Organizations
 - Faith-based Organizations
 - Healthcare organizations
 - Higher Education Institutions

Web Seminar schedule:

www.blackbaud.com – Events, Web Seminars

Questions: please email webseminars@blackbaud.com.

Blackbaud News Release Information

Raiser's Edge 7

Current release is 7.85

- Organize queries into categories!
- Make attributes inactive!

www.blackbaud.com – Support > Downloads

Version 7.90

- PCI compliance
- Currently in beta – early 2009 release

www.blackbaud.com – Company > PCI Compliance > Frequently Asked Questions

Blackbaud News - Upcoming Online Training

- | | |
|---|------------------------------------|
| • Advanced Import | 2/20, 3/17, and 3/26 (3 hours) |
| • Analytical Reporting | 3/4 and 3/35 (3 hours) |
| • Donor Acknowledgement Letters and Receipts | 3/5 and 3/27 (4 hours) |
| • Database Doctor | 3/9 and 3/24 (3 hours) |
| • Export | 3/2, 3/23, and 3/30 (3 hours) |
| • Managing Solicitors | 3/3 and 3/19 (6 hours) |
| • Planned Giving in The Raiser's Edge 7 | 3/4 and 3/11 (2 hours) |
| • Query Essentials | 3/4, 3/9, 3/25, and 3/30 (3 hours) |

View the complete schedule and register at:

www.blackbaud.com > Services > Training > Online Training

Blackbaud News

Classroom Training and Training Pass



Get full details at:

www.blackbaud.com – Services, Training

Blackbaud OnDemand

Do you need help managing technology?

- Keeping up with the Hardware and Software to run applications
 - Periodic hardware purchases and upgrades, ensuring that your system will perform at peak by employing the best technology
 - Upgrades and patches of Blackbaud and 3rd party software ensuring you are always on the latest version
- Knowledgeable resources, staff, and support
 - Implement changes when changes are needed
 - Perform regular tasks like back-ups and upgrades
 - Have expertise in both the application and infrastructure
- The right solution for Remote Access
 - Employing the right technology that simplifies access to your data while you're in or away from your office
 - Getting to your data when you need, and performing the right tasks and functions
- Focus on your mission, not the technology. Blackbaud can help you remove these responsibilities from your plate with outsourced solutions.

For more information please contact your Account Manager.

Blackbaud News

3rd Party Product Integration



- AuctionMaestro Pro – Plan, organize and implement all aspects of your fund-raising auctions! Host online auctions!



- PaperSave – Provides a secure electronic storage system and audit trail for all source documents. Replace your traditional filing systems and go paperless! Seamlessly integrated with RE7 for easy document retrieval and data-entry!

Contact your Account Manager today!

Support Resources

- Alerts
- Knowledgebase
- FAQs – product specific
- Forums
- Technical Bulletins
- Downloads
- Newsletters
- User Guides

Support Resources: www.blackbaud.com – [Support](#)

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Database Cleanup in The Raiser's Edge

Martin Burke – Solutions Engineer

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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

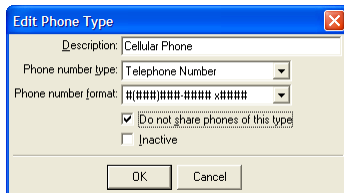
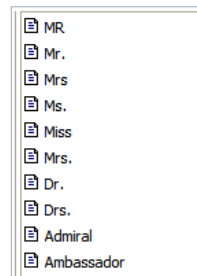
Some places to start...

- Tables
- Attributes & Appeals
- Duplicate Records



Database Cleanup – Code Tables

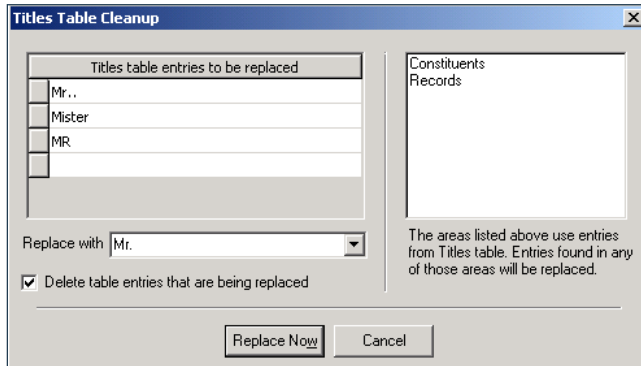
- Do all code tables have a purpose?
- Similar/Duplicate table entries
- Mark archived entries as “Inactive”
- Table order (promote most frequently used entries)
- Clean up everything from Letter Codes to Titles!



◆ Remember phone types have more options than all other table entries

Also... Straighten-up your drop-downs

- ♦ 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!



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

Database Cleanup – Attributes

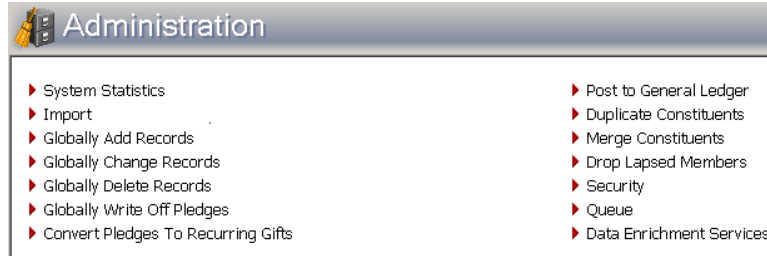
- o Limit use of attributes (only use when necessary), consider renaming fields
- o Data type: text vs. table
- o Allow only 1 per record?
- o Required? Checkboxes
- o Make them inactive! – ver. 7.85

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

Description	Dat...	Tabl...	Allow Only 1...	Required	Active
# of Family Members	Number		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Anniversary	Date		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Availability	Table	Availab...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Business Hours	Text		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Closing Codes	Table	Closing...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Committees	Table	Commit...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Dietary Preference	Table	Dietary...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Inactive	Table	Inactive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Interests	Table	Interests	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Organization Type	Table	Organi...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Origin	Table	Origin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

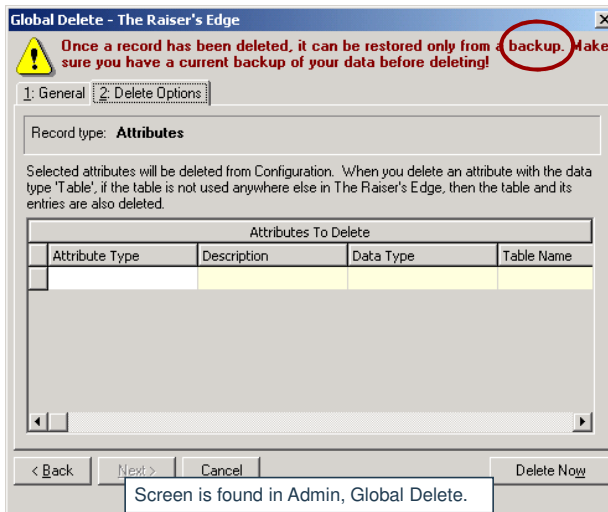
Think “globally”

- ◆ Globally Add Records
- ◆ Globally Change Records
- ◆ Globally Delete Records



Think “globally”

Get rid of unnecessary attribute clutter



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)

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Common Cleanup Queries

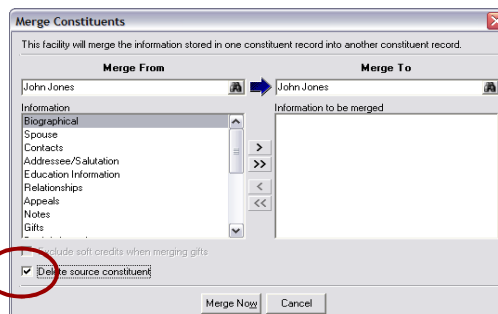
- Constituent ID - Blank
- Inactive? equals Yes
- Preferred Address Line 1 - Blank
or Preferred City – Blank
- Primary Salutation - Blank
and Key Indicator equals Individual
- Constituent Code - Blank
- Title 1 - Blank

Noticing a trend?

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Cleaning up Duplicate Records: 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**)



Final thoughts...

- 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.
- garbage in = garbage out – Establish Policies and Procedures!
- Document Everything! Use your Policy & Procedure guide* to record what was changed and why.

* Don't have one? Check out the User Guide and client documents in the Forums and use the CASE method!

How Blackbaud Can Help

Take advantage of your Support Resources!

Special pricing available through the end of March 2009:

- Additional modules: multiple module purchases and bundled training.
- Training Services: eLearning library, Distance Learning, and Training Pass
- Consulting Services: Special pricing for Conversion and Consulting services.
- OnDemand: Application hosting services for Blackbaud products.

For more information please contact your account manager.

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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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