

The**Raiser's**Edge®

The**Education**Edge™

Integration Guide

062210

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The Raiser's Edge and The Education Edge Integration Guide

THE RAISER'S EDGE AND BLACKBAUD STUDENT INFORMATION

SYSTEM INTEGRATION	1
Integration Terminology	3
Establishing Security for Integration	3
Navigating to the Integration Page	8
Printing the Integration Planning Checklist	9
How Does Integration Work?	10
Setting Up Integration	11
Setting Up Matching Criteria	24
Linking Records	29
Synchronizing Data	42
Printing the Matched Records Report	51
Printing the Integration Activity Report	60
Integration Features on Records	69
Post-Integration Checklist	70
Updating Integrated Workstations	70
INDEX	71

Contents

The Raiser's Edge and The Education Edge Integration

Contents

Integration Terminology	3
Establishing Security for Integration	3
Navigating to the Integration Page	8
Printing the Integration Planning Checklist	9
How Does Integration Work?	10
Setting Up Integration	11
Selecting Databases	11
Mapping Fields	12
Mapping Record Types	15
Setting Up Matching Criteria	24
Matching Addresses	27
Linking Records	29
Parts of the Link Records Screen	30
Linking Records for the First Time	36
Linking Records on a Regular Basis	39
Synchronizing Data	42
Printing the Matched Records Report	51
General Tab	52
Filters Tab	53
Columns Tab	54
Format Tab	55
Printing the Integration Activity Report	60
General Tab	61
Filters Tab	62
Columns Tab	63
Format Tab	63
Integration Features on Records	69
Post-Integration Checklist	70
Updating Integrated Workstations	70

Chapter 1

 You must be using *The Raiser's Edge* 7.83 or higher and *The Education Edge* 7.75 or higher to integrate the programs.

With integration, you can link records between *The Education Edge* and *The Raiser's Edge* and synchronize data on the records. If you have *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 the *Integrating Student Billing with The Education Edge* guide.

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*.

Before proceeding with *The Raiser's Edge* and *The Education Edge* integration, you must read and understand *The Raiser's Edge and The Education Edge Integration Planning Guide* which contains an Integration Planning Checklist. You can also access this checklist within our help file using a link on the Administration page in *Admissions Office*, *Registrar's Office*, or *Student Billing*. The last step of the checklist is to contact us to receive an unlock code to turn on the integration features in your programs.

Integration Terminology

This section defines words you need to know as you work with integration.

Relation. The person or organization involved in a relationship.

Relationship. The interaction between two records. For example, a person can have a relationship with another person. Each person is a relation of the other.

Shared. Information is only considered shared within one database. For example, an address can be shared with multiple records.

Matched. Records are considered matched between databases when the fields used as matching criteria have the same values. Matching records helps you determine which records to link.

Linked. Records are considered linked when you have specified that a record in one database is the same as a record in another database and information should be kept the same on the records. For example, you link Michael Andrew's student record in *The Education Edge* with his constituent record in *The Raiser's Edge*.

Synchronized. Records are considered synchronized when two records are linked and the database has moved information from one database to the other database to keep the records the same. For example, you change Michael Andrew's phone number in *The Education Edge*, and when you synchronize data, his phone number is updated in *The Raiser's Edge*.

Establishing Security for Integration

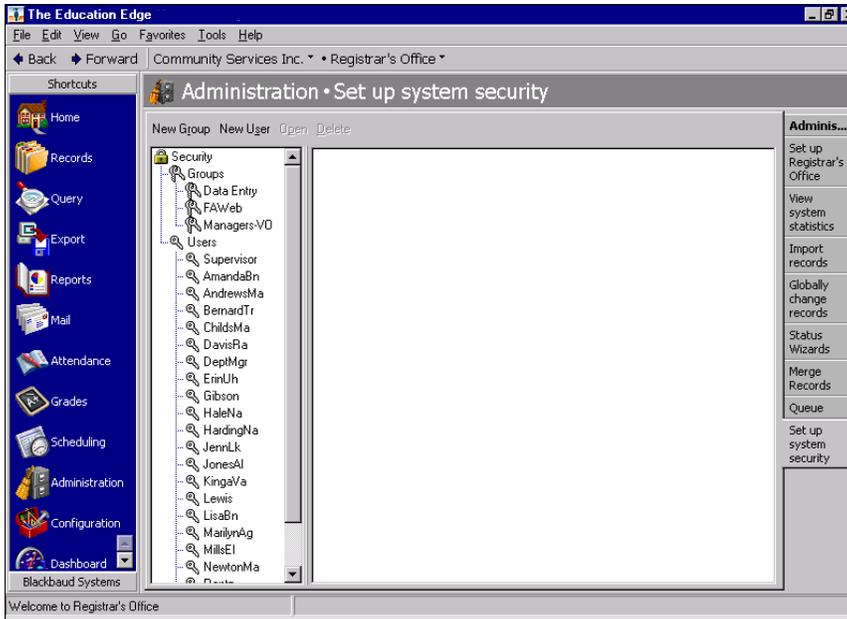
Once you decide who the integration users are going to be for *The Raiser's Edge* and *The Education Edge*, you can assign appropriate rights to the users in the two programs.

➤ **Establishing security for integration in The Education Edge**

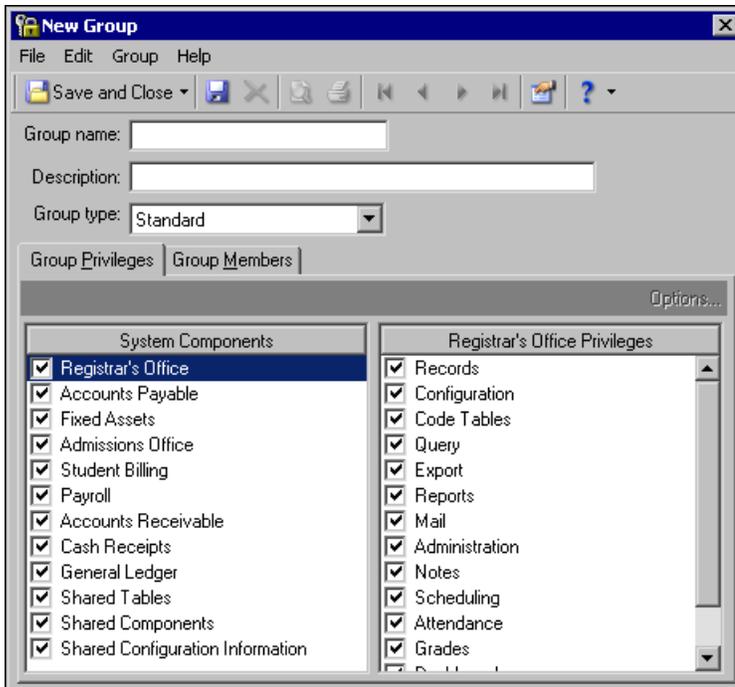
Integration appears in *Admission's Office*, *Registrar's Office*, and *Student Billing*. A user with access to integration in at least one program has access to integration in all programs.

1. On the navigation bar, click **Administration**. The Administration page appears.
2. Click **Set up system security**. The Set up system security page appears.

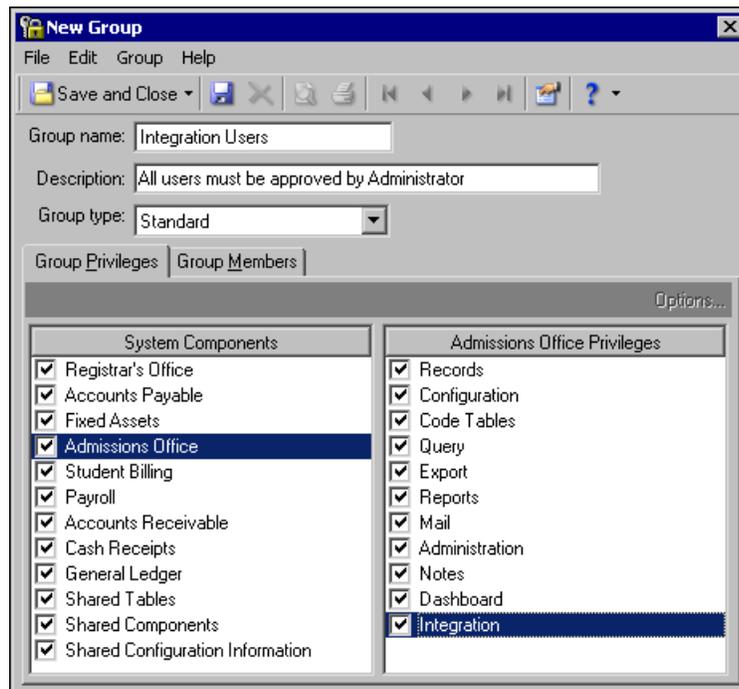
 For more information about security in *The Education Edge*, see the *Administration Guide*.



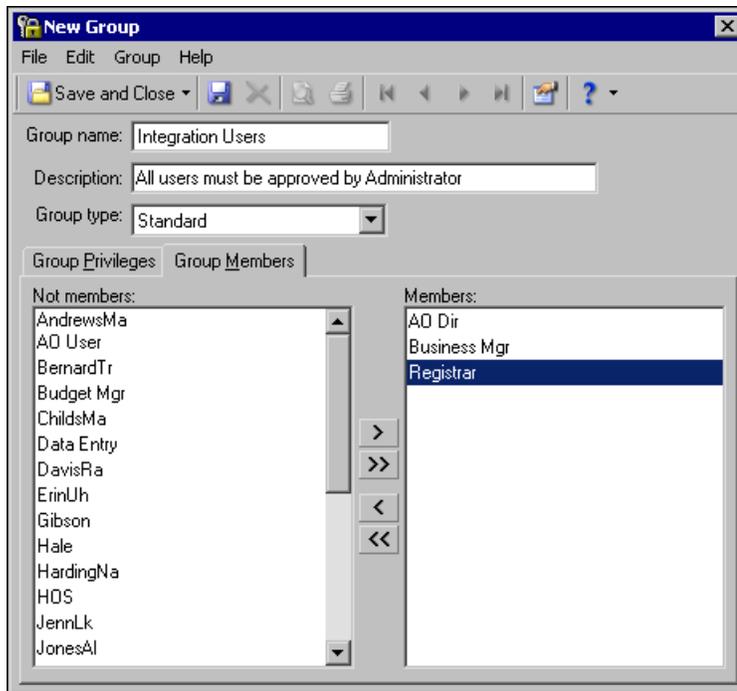
3. On the action bar, click **New Group**. The New Group screen appears.



4. In the **Group Name** field, enter a name for the group of users. For example, enter “Integration Users”.
5. In the **Description** field, you can enter more information about the group. For example, enter “All users must be approved by Administrator”.
6. In the **Group type** field, select “Standard”.
7. In the **System Components** box, mark the checkbox for the program you want to establish integration settings for. For example, mark the **Admissions Office** checkbox.
8. In the **Privileges** box, mark the **Integration** checkbox.



9. Select the Group Members tab. To include a user in the group, select the user name in the **Not Members** box. Click the right arrow and the user name moves to the **Members** box.



10. When you have finished adding users to the group, click **Save and Close** to save the group and return to the Set up security page.

➤ **Establishing security for integration in The Raiser's Edge**

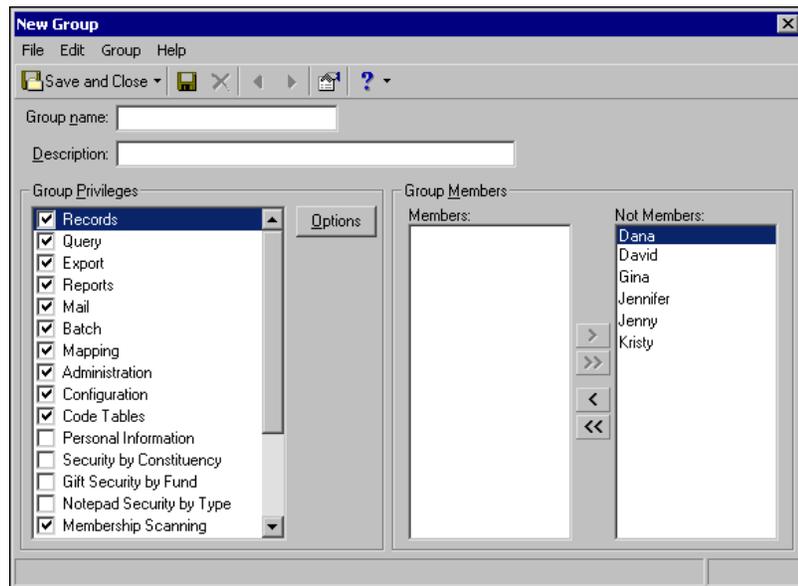
1. On the navigation bar, click **Admin**. The Administration page appears.

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

2. Click **Security**. The Security page appears.

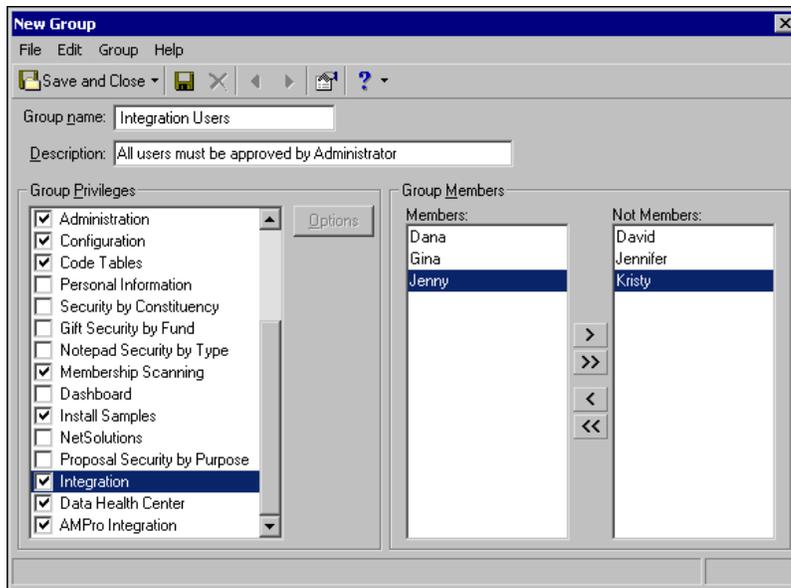


3. On the action bar, click **New Group**. The New Group screen appears.



4. In the **Group Name** field, enter a name for the group of users. For example, enter “Integration Users”.
5. In the **Description** field, you can enter more information about the group. For example, enter “All users must be approved by Administrator”.
6. In the **Group Privileges** box, mark **Integration**.

7. In the **Group Members** box, designate the users in the group. To include a user in the group, select the user name in the **Not Members** box. Click the left arrow and the user name moves to the **Members** box.



8. When you have finished adding users to the group, click **Save and Close** to save the group and return to the Security page.

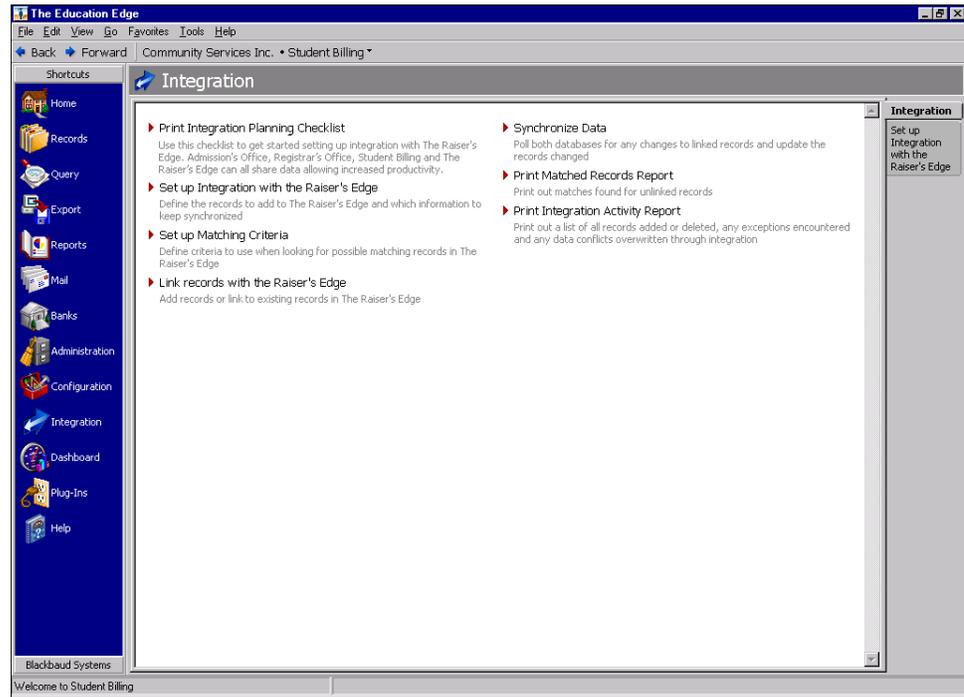
Navigating to the Integration Page

The Integration page is the central location for all integration tasks. Before you can access the Integration page in *The Education Edge*, you must have unlocked integration in *The Education Edge*. Then in *The Education Edge*, you must select the *Raiser's Edge* database to integrate before you can access the Integration page in *The Raiser's Edge*.

After integration is unlocked and the database is selected, you can access the Integration page in either *The Raiser's Edge* or *The Education Edge*. Keep in mind that to access the Integration page, you must have both programs installed on the same workstation so they can communicate in the background, but you do not have to be logged into both.

Accessing Integration in The Education Edge

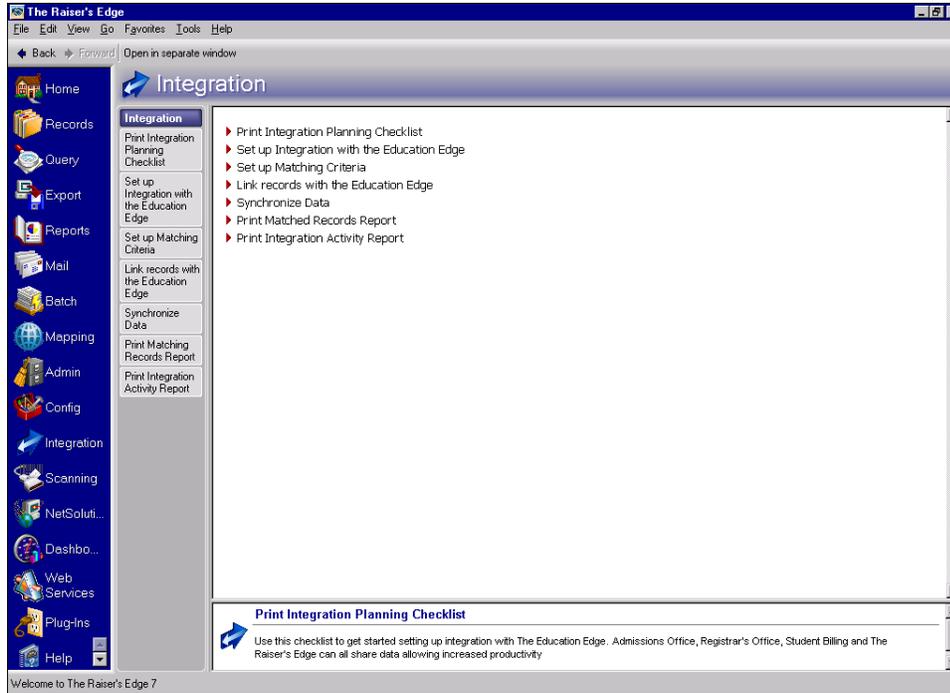
To access the Integration page in *The Education Edge*, click **Integration** on the navigation bar in *Admissions Office*, *Registrar's Office*, or *Student Billing*. When you first access the page, only the **Print Integration Planning Checklist** and **Set up Integration with the Raiser's Edge** links appear. After you select the data source, the remaining links appear.



The **Set up Integration with the Raiser's Edge** link takes you to pages in *Configuration*. You can also access these pages by clicking **Configuration** on the navigation bar, then clicking **Raiser's Edge**.

Accessing Integration in The Raiser's Edge

To access the Integration page in *The Raiser's Edge*, click **Integration** on the navigation bar. The Integration page does not appear until the *Raiser's Edge* database to integrate is selected in *The Education Edge*.



The **Set up Integration with the Education Edge** link takes you to pages in *Configuration*. You can also access these pages by clicking **Config** on the navigation bar, then clicking **Education Edge**.

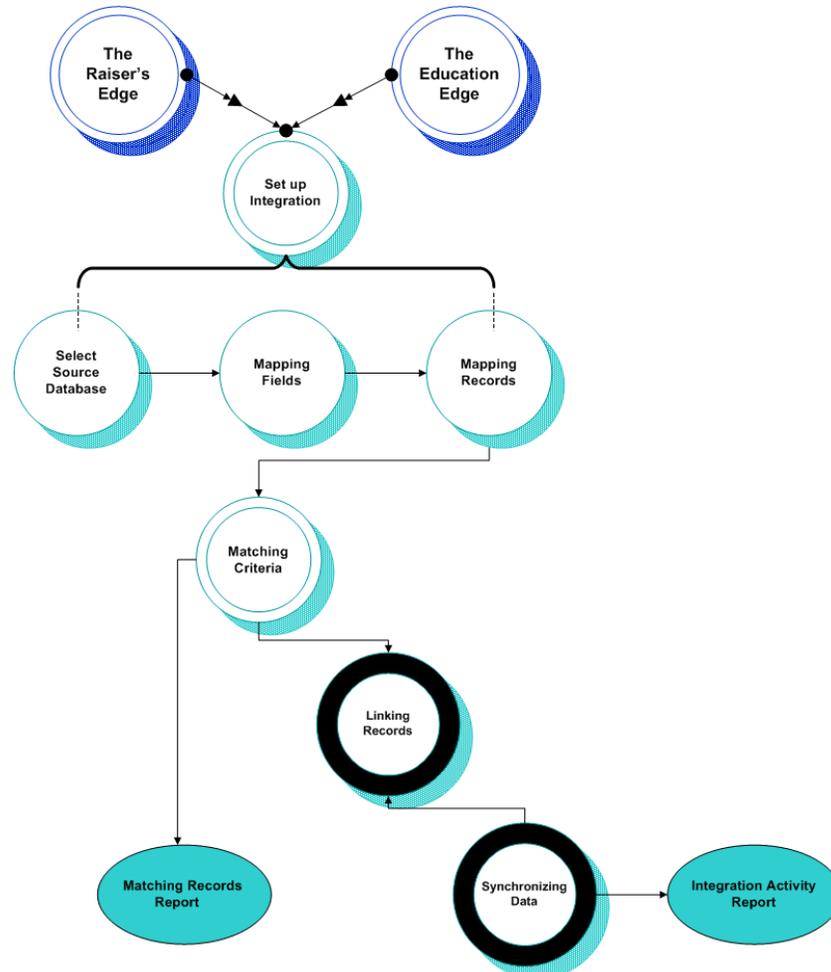
Printing the Integration Planning Checklist

Before proceeding with integration, you should have thoroughly planned for the integration using the Integration Planning Checklist. The **Print Integration Planning Checklist** link takes you to the Integration Planning section in our help file. You can also access this information in PDF format in *The Raiser's Edge and The Education Edge Integration Planning Guide*.

 Planning is critical to successful integration.

How Does Integration Work?

Integrating *The Raiser's Edge* and *The Education Edge* involves a series of steps. You can follow the Integration page to complete the steps.



Step 1: Setting up integration. Setting up integration entails selecting the *Raiser's Edge* database to integrate with *The Education Edge*, selecting the fields to map, and selecting how to map record types. For more information, see “Setting Up Integration” on page 11.

Step 2: Setting up matching criteria. To effectively search for records to link between the databases, you need to define the criteria to use when searching for possible matching records between the two databases. For more information, see “Setting Up Matching Criteria” on page 24.

Step 3: Linking records. After defining your matching criteria, you can search for matching records and establish links between the records in both databases. You can also add records from one database to the other database. For more information, see “Linking Records” on page 29.

Step 4: Synchronizing data. When you synchronize data, you keep the mapped fields and mapped relationships synchronized. You can synchronize data automatically or manually. For more information, see “Synchronizing Data” on page 42.

 Use the Matched Records Report to list matches found for unlinked records. For more information about the Matched Records Report, see “Printing the Matched Records Report” on page 51.

Step 5: Printing Integration Activity report. To regularly monitor integration activity, you can print the Integration Activity Report which lists activities performed and logged on the Link Records screen and by the Synchronize Data utility. The information in the report includes records that have been added or deleted, exceptions, and data conflicts with integration. For more information, see “Printing the Integration Activity Report” on page 60.

Setting Up Integration

After you unlock integration in *The Education Edge*, you can access the Integration page in *The Education Edge* to select the *Raiser’s Edge* database to integrate.

In either *The Education Edge* or *The Raiser’s Edge*, you can select the fields to map among records, and how to map record types by establishing criteria for when records in *The Education Edge* become records in *The Raiser’s Edge*.

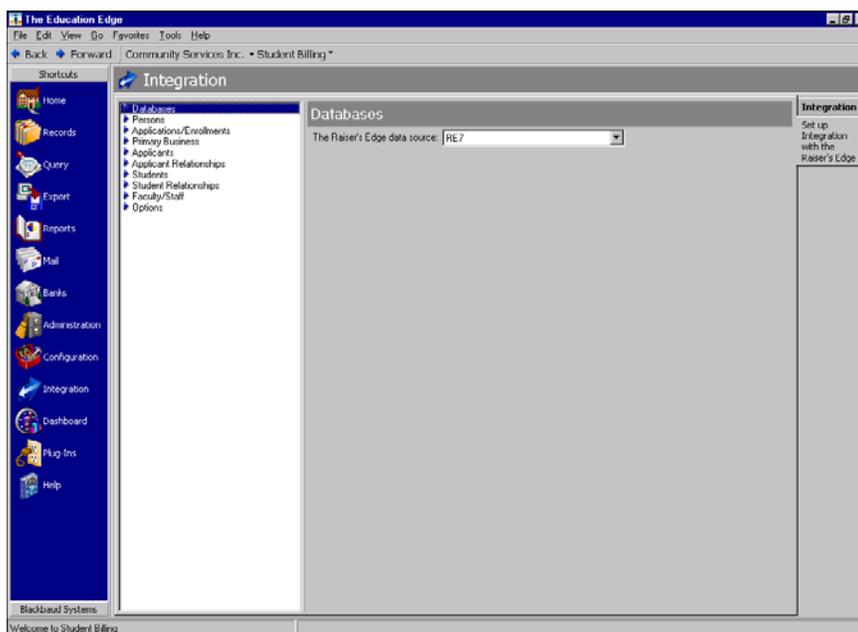
Selecting Databases

In *The Education Edge*, you select the *Raiser’s Edge* database to integrate.

If the database does not appear, confirm that both programs are installed on the same workstation, you are on the correct version of the programs (*The Raiser’s Edge* 7.83 or higher, and *The Education Edge* or *The Financial Edge* 7.75 or higher), and you have logged in to each program at least once after updating to that version to update the database.

➤ Selecting the data source

1. From the Integration page in *The Education Edge*, click **Set up Integration with the Raiser’s Edge**. The **Databases** frame appears on the right.



 If you are logged into *The Raiser's Edge*, the database you are logged into is automatically selected in the field.

2. In **The Raiser's Edge data source** field, select the *Raiser's Edge* database to use.
3. After you select a database, the remaining treeview options appear under **Databases**. Continue with the next section. Your database selection is saved after you leave the page.

Mapping Fields

The next step is to select the fields to map between *The Raiser's Edge* and *The Education Edge*. For example, you can map the **Last name** field in *The Raiser's Edge* to the **Last name** field in *The Education Edge*.

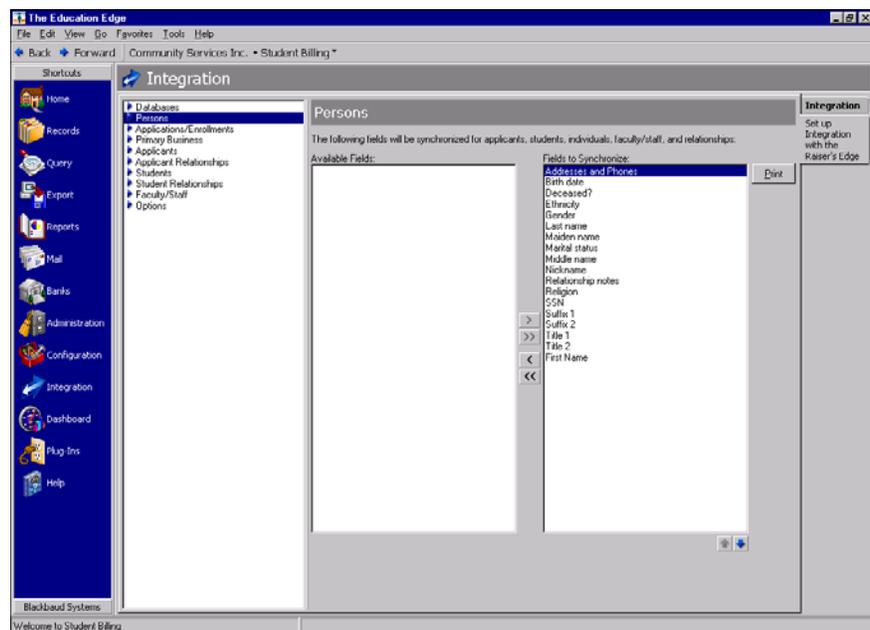
Determining the fields to map is an important step in integration planning that the integration committee should have decided before you begin this setup. Refer to the tables you filled out in the *Integration Planning Guide* when completing this step.

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.

➤ Mapping people fields

1. From the Integration page, click **Set up Integration with the Raiser's Edge**.
2. In the treeview on the left, select **Persons**. The **Persons** frame appears on the right.

 Though this procedure shows *The Education Edge*, the steps are similar if you are in *The Raiser's Edge*.



 To move all the fields, click the double right arrow.

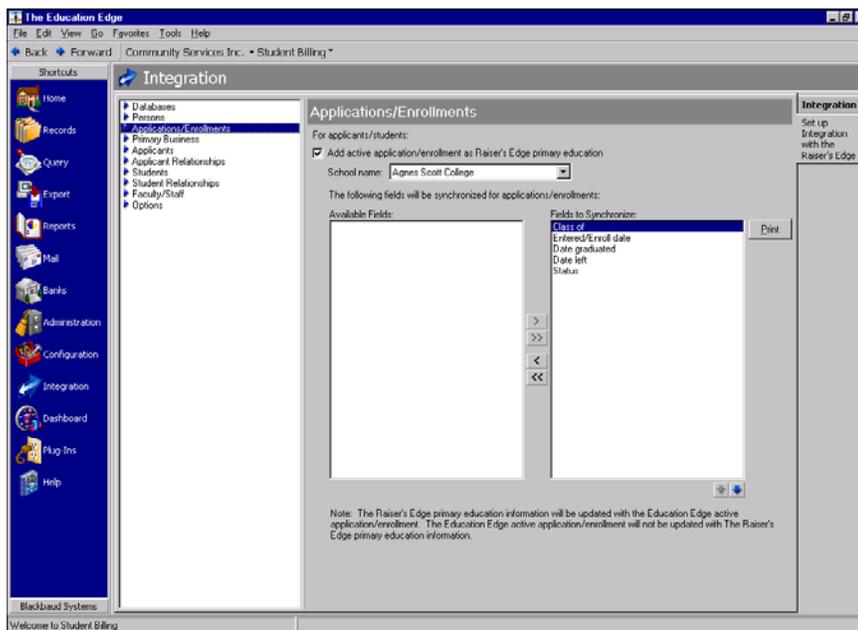
3. To select a field to map, select the field in the **Available Fields** box and click the single right arrow to move the field to the **Fields to Synchronize** box.

4. To print a list of the fields you selected to map, click **Print**.
5. The program saves your selections automatically when you leave the page.

➤ **Mapping application/enrollment fields to primary education**

1. From the Integration page, click **Set up Integration with the Raiser’s Edge**.
2. In the treeview on the left, select **Applications/Enrollments**. The **Applications/Enrollments** frame appears on the right.

 Though this procedure shows *The Education Edge*, the steps are similar if you are in *The Raiser’s Edge*.



3. To add an applicant/student’s active application/enrollment as an education record with **Primary alumni information** marked to their record in *The Raiser’s Edge*, mark **Add active application/enrollment as Raiser’s Edge primary education**.

 Applications apply to **Admissions Office**. Enrollments apply to **Registrar’s Office** and **Student Billing**.

If you do not have *The Raiser’s Edge Alumni Tracking*, the application/enrollment still maps to an education record in *The Raiser’s Edge*, but the record is not marked as primary alumni information.

4. In the **School name** field, select the school for the primary education record. You can select from schools in the **Schools** table in *The Raiser’s Edge*. To add a school to the table, you must add it in *The Raiser’s Edge*.
5. To select a field to map, select the field in the **Available Fields** box and click the single right arrow to move the field to the **Fields to Synchronize** box.

 To move all the fields, click the double right arrow.

We recommend you include the **Status** field so the development office can be aware of the applicant/student’s status.

 When synchronizing data, the application/enrollment can update the primary education, but the primary education cannot update the application/enrollment.

6. To print a list of the fields you selected to map, click **Print**.
7. The program saves your selections automatically when you leave the page.

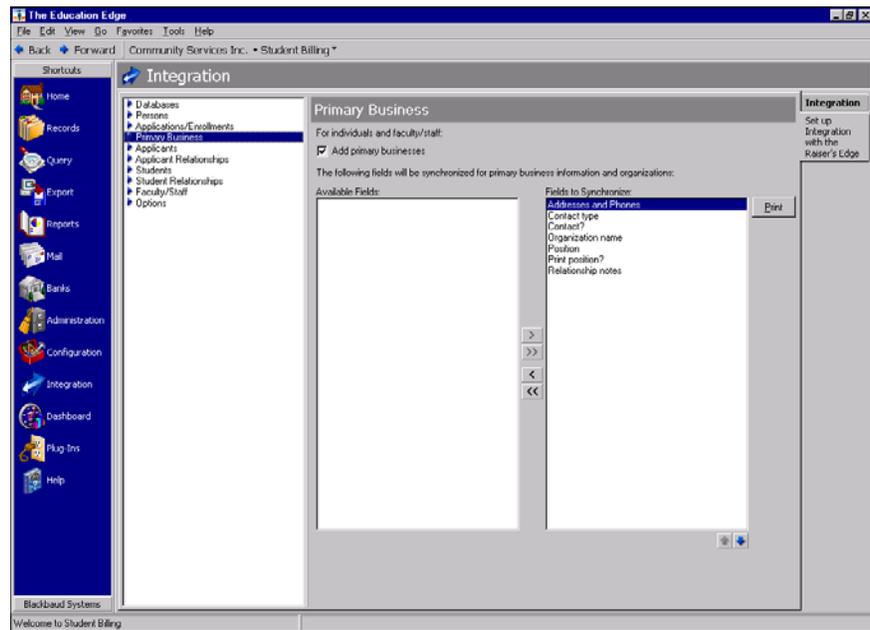
Though this procedure shows *The Education Edge*, the steps are similar if you are in *The Raiser's Edge*.

Faculty/staff records are in *Admissions Office* and *Registrar's Office* only.

To move all the fields, click the double right arrow.

➤ Mapping primary business fields

1. From the Integration page, click **Set up Integration with the Raiser's Edge**.
2. In the treeview on the left, select **Primary Business**. The **Primary Business** frame appears on the right.



3. To add an individual or faculty/staff member's primary business information as their primary business information on their record in *The Raiser's Edge*, mark **Add primary business**.

The primary business consists of an address for a person and an organization and the person's relationship with the organization. For the primary business information to be added to the target database, the organization specified in the business relationship must exist in both databases and be linked.

4. To select a field to map, select the field in the **Available Fields** box and click the single right arrow to move the field to the **Fields to Synchronize** box.
5. To print a list of the fields you selected to map, click **Print**.
6. The program saves your selections automatically when you leave the page.

Mapping Record Types

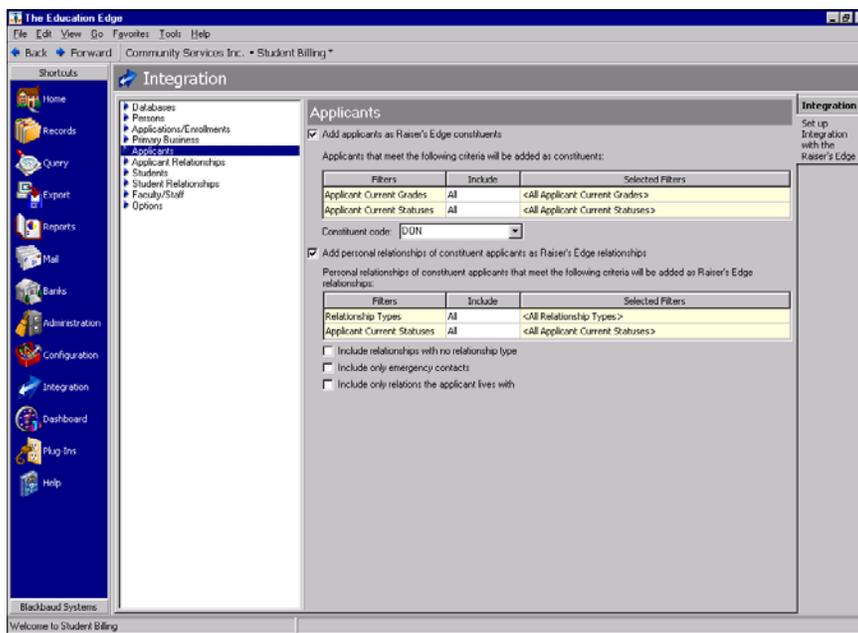
The next step is to designate when applicants, students, their relations, and faculty/staff become constituents in *The Raiser's Edge*.

When planning for integration, you should have determined how you want to map records, most importantly, applicants and students. The options for applicant/students include (1) adding applicant/students as constituents and their relatives as relations, (2) adding their relatives as constituents and the applicant/students as relations, or (3) including both applicant/students and their relatives as constituents and creating relationships between them.

➤ Mapping applicants

1. From the Integration page, click **Set up Integration with the Raiser's Edge**.
2. In the treeview on the left, select **Applicants**. The **Applicants** frame appears on the right.

 Though this procedure shows *The Education Edge*, the steps are similar if you are in *The Raiser's Edge*.



3. To add applicants as constituents in *The Raiser's Edge*, mark **Add applicants as Raiser's Edge constituents**.
4. In the **Applicants that meet the following criteria will be added as constituents** grid, you can narrow the applicants to be added as constituents by filtering on applicant grades and statuses. For example, you may not want to include applicants until they have been officially accepted.
5. In the **Constituent code** field, select the constituent code to use on linked records or records added to *The Raiser's Edge*.
 - If a constituent code is not on the record, this constituent code is added to the record. You mark an option (see "Options" on page 23) to default the date in the **Date From** column to the current date.
 - If a constituent code is already on the record, but the date in the **Date To** column is on or before the current date, the constituent code is added again.

- If a constituent code is already on the record and the date in the **Date To** column is after the current date, or is blank, the constituent code is not added again.
6. To add the personal relationships of the applicants as their individual relationships in *The Raiser's Edge*, mark **Add personal relationships of constituent applicants as Raiser's Edge relationships**.
 7. In the **Personal relationships of constituent applicants that meet the following criteria will be added as Raiser's Edge relationships** grid, you can select which relationships to include by filtering on relationship types. You can also select the applicants for which to include relationships by further filtering on the applicant's current status.

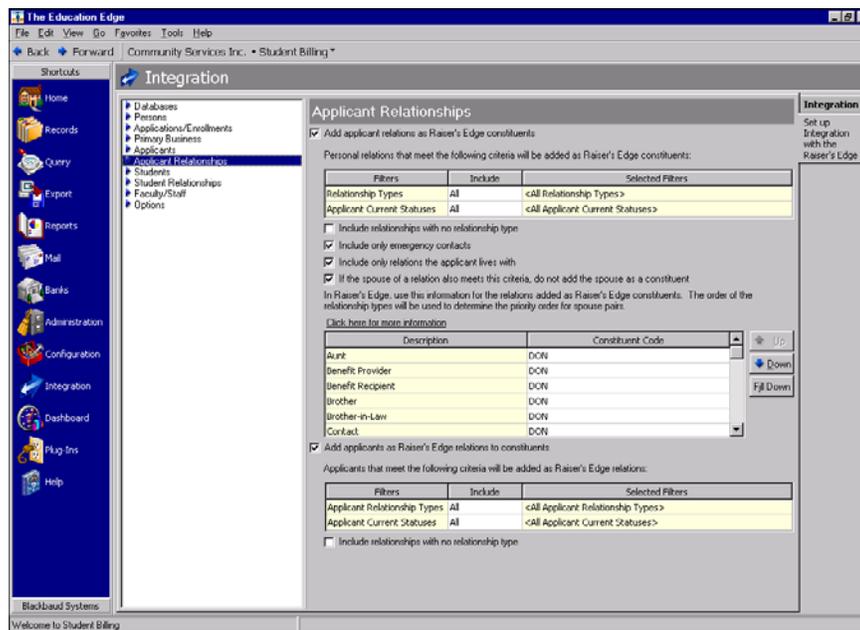
For example, if you want to include the applicant's mother and father as relationships on the applicant's constituent record, mark **Add personal relationships of constituent applicants as Raiser's Edge relationships** and select the relationship types of Mother and Father in the **Personal relationships of constituent applicants that meet the following criteria will be added as Raiser's Edge relationships** grid.
 8. To add relationships without a relationship type specified, mark **Include relationships with no relationship type**.
 9. To include relationships only for persons designated as an emergency contact, mark **Include only emergency contacts**.
 10. To include relationships only for persons designated as living with the applicant, mark **Include only relations the applicant lives with**.
 11. The program saves your selections automatically when you leave the page.

➤ **Mapping applicant relationships**

1. From the Integration page, click **Set up Integration with the Raiser's Edge**.

 Though this procedure shows *The Education Edge*, the steps are similar if you are in *The Raiser's Edge*.

- In the treeview on the left, select **Applicant Relationships**. The **Applicant Relationships** frame appears on the right.



- To add applicant relations as constituents in *The Raiser's Edge*, mark **Add applicant relations as Raiser's Edge constituents**.
- In the **Personal relations that meet the following criteria will be added as Raiser's Edge constituents** grid, you can narrow the relations to be added by filtering on relationship types and current status of the applicants.

For example, if you want to include the applicant's mother and father as constituents in *The Raiser's Edge*, mark **Add applicant relations as Raiser's Edge constituents** and select the relationship types of Mother and Father the **Personal relations that meet the following criteria will be added as Raiser's Edge constituents** grid.

- To add relations without a relationship type specified, mark **Include relationships with no relationship type**.
- To include relations only if they are designated as an emergency contact, mark **Include only emergency contacts**.
- To include relations only if they are designated as living with the applicant, mark **Include only relations the applicant lives with**.
- If two spouses are both supposed to be added according to the criteria, by marking **If the spouse of a relation also meets this criteria, do not add the spouse as a constituent**, you select to include only one of the spouses as the constituent and the other as a spouse relationship for that constituent.
- In the next grid, select a constituent code for each relationship type.

 To reorder relationship types in the list, use the **Up** and **Down** buttons beside the grid.

If you marked **If the spouse of a relation also meets this criteria, do not add the spouse as a constituent**, the order of the relationship types in the grid determines which spouse is added as a constituent and which as a spouse of the constituent. The first relationship type is added as the constituent. For example, “Father” is before “Mother” in the grid. The father will be added as a constituent, with the mother as his spouse.

10. To add applicants as relations on the constituent records created, mark **Add applicants as Raiser’s Edge relations to constituents**. If you are not adding applicants as constituents, this gives you a way to store applicants. If you are adding applicants as constituents, this creates relationships between the applicant constituents and relation constituents.
11. In the **Applicants that meet the following criteria will be added as Raiser’s Edge relations** grid, you can narrow the applicants to be added as relations by filtering on relationship types and current statuses of the applicants. You can also mark a checkbox to include applicants without relationship types specified.

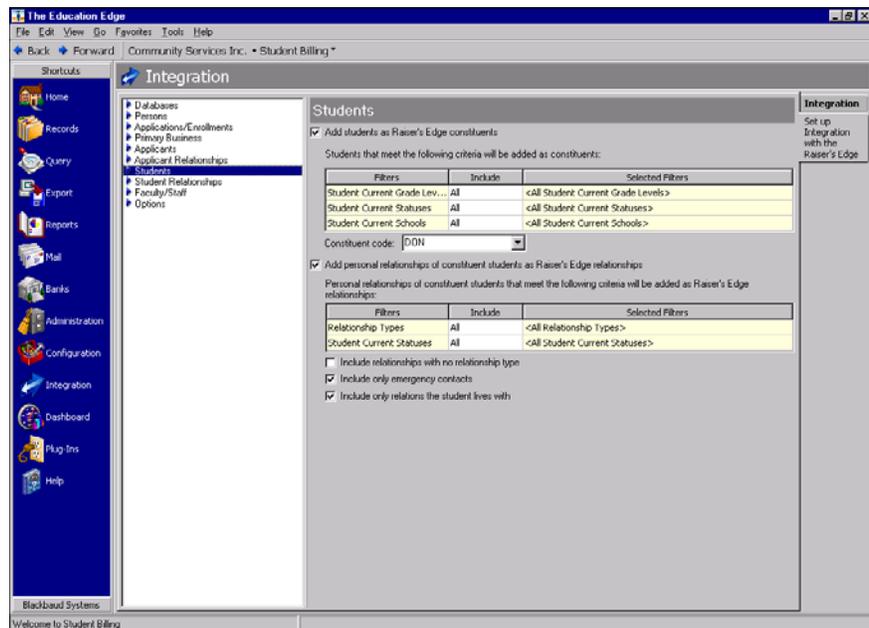
For example, you may want to include relationships only for daughters and sons that have been officially accepted.

12. The program saves your selections automatically when you leave the page.

➤ Mapping students

1. From the Integration page, click **Set up Integration with the Raiser’s Edge**.
2. In the treeview on the left, select **Students**. The **Students** frame appears on the right.

 Though this procedure shows *The Education Edge*, the steps are similar if you are in *The Raiser’s Edge*.



3. To add students as constituents in *The Raiser’s Edge*, mark **Add students as Raiser’s Edge constituents**.

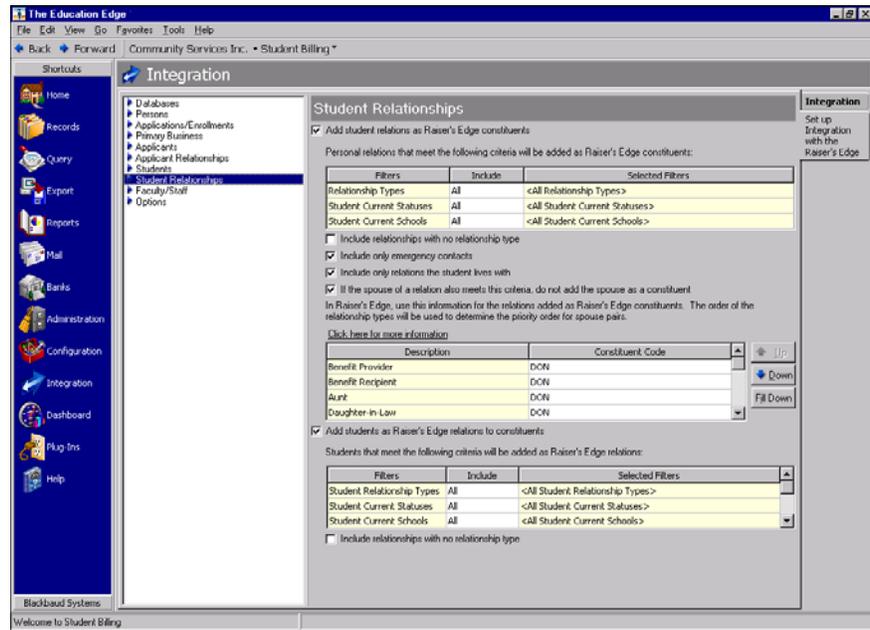
4. In the **Students that meet the following criteria will be added as constituents** grid, you can narrow the students to be added as constituents by filtering on current grade levels, statuses, and schools. For example, you may not want to include students until they have graduated.
5. In the **Constituent code** field, select the constituent code to use on linked records or records added to *The Raiser's Edge*.
 - If a constituent code is not on the record, this constituent code is added to the record. You mark an option (see “Options” on page 23) to default the date in the **Date From** column to the current date.
 - If a constituent code is already on the record, but the date in the **Date To** column is on or before the current date, the constituent code is added again.
 - If a constituent code is already on the record and the date in the **Date To** column is after the current date, or is blank, the constituent code is not added again.
6. To add the personal relationships of the students as their individual relationships in *The Raiser's Edge*, mark **Add personal relationships of constituent students as Raiser's Edge relationships**.
7. In the **Personal relationships of constituent students that meet the following criteria will be added as Raiser's Edge relationships** grid, you can select which relationships to include by filtering on relationship types. You can also select the students for which to include relationships by further filtering on the student's current status.
 For example, if you want to include the student's mother and father as relationships on the student's constituent record, mark **Add personal relationships of constituent students as Raiser's Edge relationships** and select the relationship types of Mother and Father in the **Personal relationships of constituent students that meet the following criteria will be added as Raiser's Edge relationships** grid.
8. To add relationships without a relationship type specified, mark **Include relationships with no relationship type**.
9. To include relationships only for persons designated as an emergency contact, mark **Include only emergency contacts**.
10. To include relationships only for persons designated as living with the student, mark **Include only relations the student lives with**.
11. The program saves your selections automatically when you leave the page.

➤ Mapping student relationships

1. From the Integration page, click **Set up Integration with the Raiser's Edge**.

 Though this procedure shows *The Education Edge*, the steps are similar if you are in *The Raiser's Edge*.

- In the treeview on the left, select **Student Relationships**. The **Student Relationships** frame appears on the right.



- To add student relations as constituents in *The Raiser's Edge*, mark **Add student relations as Raiser's Edge constituents**.
- In the **Personal relations that meet the following criteria will be added as Raiser's Edge constituents** grid, you can narrow the relations to be added by filtering on relationship types and current statuses and schools of the students.

For example, if you want to include the student's mother and father as constituents in *The Raiser's Edge*, mark **Add student relations as Raiser's Edge constituents** and select the relationship types of Mother and Father the **Personal relations that meet the following criteria will be added as Raiser's Edge constituents** grid.

- To add relations without a relationship type specified, mark **Include relationships with no relationship type**.
- To include relations only if they are designated as an emergency contact, mark **Include only emergency contacts**.
- To include relations only if they are designated as living with the student, mark **Include only relations the student lives with**.
- If two spouses are both supposed to be added according to the criteria, by marking **If the spouse of a relation also meets this criteria, do not add the spouse as a constituent**, you select to include only one of the spouses as the constituent and the other as a spouse relationship for that constituent.
- In the next grid, select a constituent code for each relationship type.

If you marked **If the spouse of a relation also meets this criteria, do not add the spouse as a constituent**, the order of the relationship types in the grid determines which spouse is added as a constituent and which as a spouse of the constituent. The first relationship type is added as the constituent. For example, “Father” is before “Mother” in the grid. The father will be added as a constituent, with the mother as his spouse.

- To add students as relations on the constituent records created, mark **Add students as Raiser’s Edge relations to constituents**. If you are not adding students as constituents, this gives you a way to store students. If you are adding students as constituents, this creates relationships between the student constituents and relation constituents.
- In the **Students that meet the following criteria will be added as Raiser’s Edge relations** grid, you can narrow the students to be added as relations by filtering on relationship types and current statuses and schools of the students. You can also mark a checkbox to include students without relationship types specified.

For example, you may want to include relationships only for daughters and sons that have graduated.

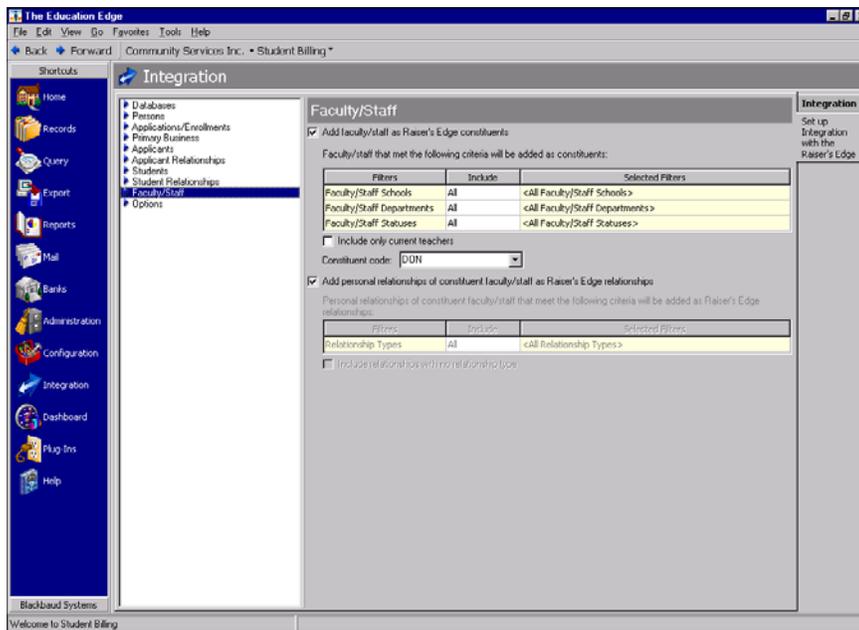
- The program saves your selections automatically when you leave the page.

➤ **Mapping faculty/staff**

- From the Integration page, click **Set up Integration with the Raiser’s Edge**.
- In the treeview on the left, select **Faculty/Staff**. The **Faculty/Staff** frame appears on the right.

 To reorder relationship types in the list, use the **Up** and **Down** buttons beside the grid.

 Though this procedure shows *The Education Edge*, the steps are similar if you are in *The Raiser’s Edge*.



 The program automatically includes a faculty/staff member's spouse on the constituent record.

3. To add faculty/staff as constituents in *The Raiser's Edge*, mark **Add faculty/staff as Raiser's Edge constituents**.
4. In the **Faculty/staff that meet the following criteria will be added as constituents** grid, you can narrow the faculty/staff to be added as constituents by filtering on schools, departments, and statuses.
5. To include only faculty/staff designated as current teachers, mark **Include only current teachers**.
6. In the **Constituent code** field, select the constituent code to use on linked records or records added to *The Raiser's Edge*.
 - If a constituent code is not on the record, this constituent code is added to the record. You mark an option (see "Options" on page 23) to default the date in the **Date From** column to the current date.
 - If a constituent code is already on the record, but the date in the **Date To** column is on or before the current date, the constituent code is added again.
 - If a constituent code is already on the record and the date in the **Date To** column is after the current date, or is blank, the constituent code is not added again.
7. To add the personal relationships of the faculty/staff as their individual relationships in *The Raiser's Edge*, mark **Add personal relationships of constituent faculty/staff as Raiser's Edge relationships**.
8. In the **Personal relationships of constituent faculty/staff that meet the following criteria will be added as Raiser's Edge relationships** grid, you can narrow the relationships to be added by filtering on relationship types.
9. To add relationships without a relationship type specified, mark **Include relationships with no relationship type**.
10. The program saves your selections automatically when you leave the page.

Options

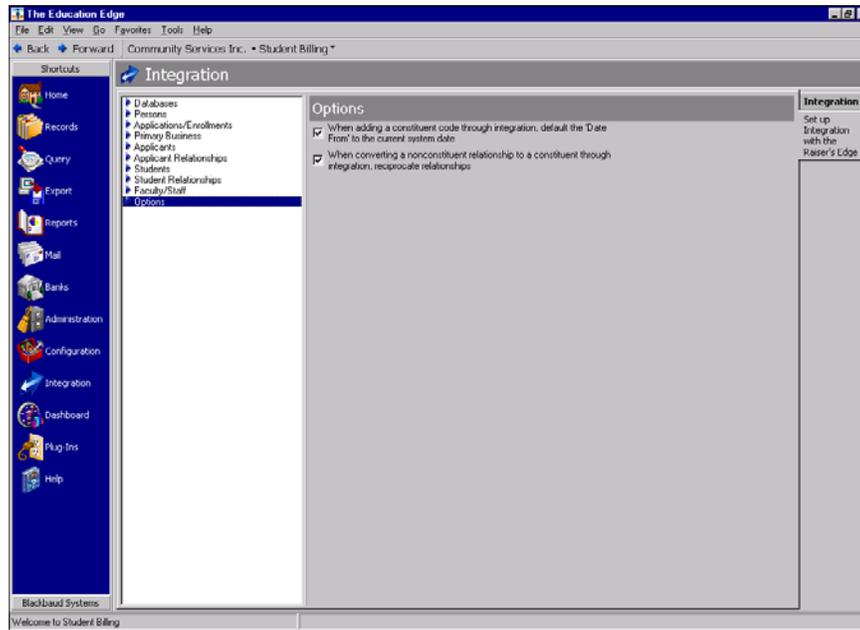
You can set options specific to integration.

➤ Selecting options

1. From the Integration page, click **Set up Integration with the Raiser's Edge**.

 Though this procedure shows *The Education Edge*, the steps are similar if you are in *The Raiser's Edge*.

- In the treeview on the left, select **Options**. The **Options** frame appears on the right.



- To add the current date to the **Date From** column when adding constituent code information to a record, mark **When adding a constituent code through integration, default the 'Date From' to the current system date**.
- In *The Raiser's Edge*, when you convert a nonconstituent to a constituent, the program asks if you want to reciprocate relationships. Mark **When converting a nonconstituent relationship to a constituent through integration, reciprocate relationships** to automatically reciprocate relationships for nonconstituent records converted to constituent records through integration.

For example, if a student linked to a nonconstituent record graduates and becomes a constituent upon graduation, the relationships on the student's former nonconstituent record are reciprocated on the student's constituent record if you mark this checkbox.

- The program saves your selections automatically when you leave the page.

Setting Up Matching Criteria

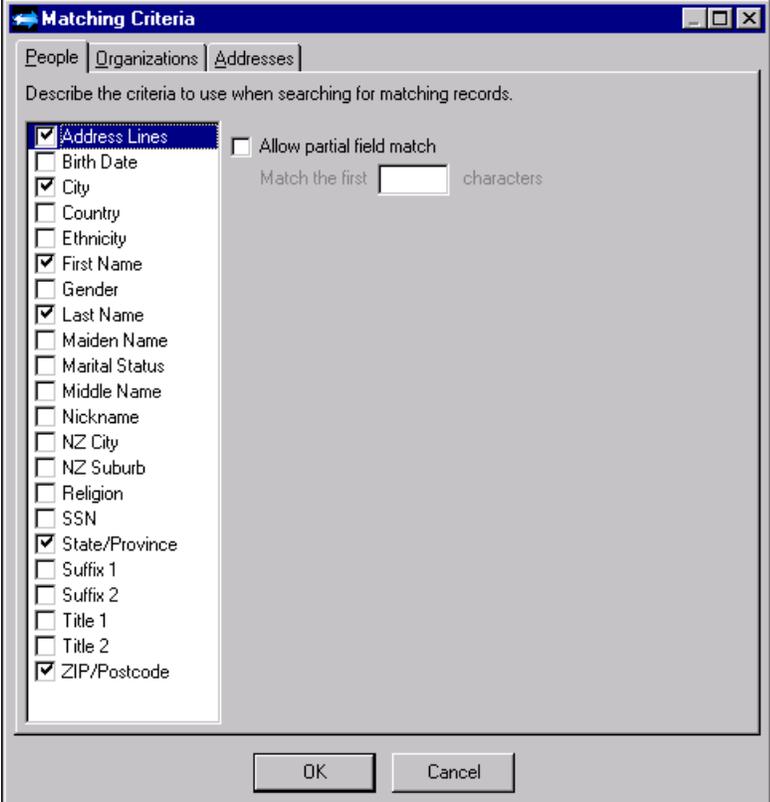
To effectively search for records to link, you need to define the criteria for the program to use to search for possible matching records between the two databases. Once the program finds possible matching records based on your matching criteria, you can manually determine if the records found are matching records you will link. To be considered a matching record, at least one field must match.

On the People tab of the Matching Criteria screen, you establish criteria for matching people records, including applicants, students, student/applicants, individuals, faculty/staff, constituents, and nonconstituents. On the Organizations tab, you establish criteria for matching organization records. On the Addresses tab, you establish criteria for how addresses of matching people and organization records are matched. When matching address text fields, the program ignores punctuation and uses address abbreviation equivalents to search for addresses that are the same but may be punctuated or abbreviated differently. For details, see “Matching Addresses” on page 27. Keep in mind that punctuation is only ignored in address text fields, not in any other fields. For example, last names of Oeal and O’neal do not match.

Be aware that phone numbers are not included in address matching criteria. If address information does not match another address based on matching criteria, that address information can be added to the other database. If you have address information consisting of phone numbers only, be aware that duplicate addresses containing the same phone numbers could be added. Be sure to review your address match details before linking records. You can also use the Matched Records Report to review address and phone information.

➤ Setting up matching criteria

1. From the Integration page, click **Set up Matching Criteria**. The Matching Criteria screen appears.



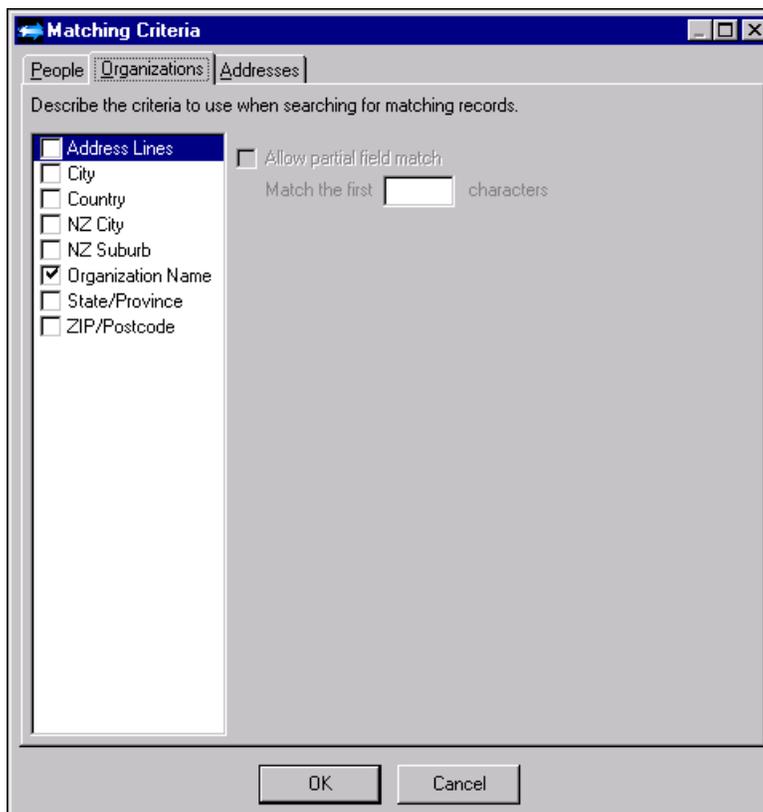
The screenshot shows the 'Matching Criteria' dialog box with the 'People' tab selected. The dialog has three tabs: 'People', 'Organizations', and 'Addresses'. The 'People' tab is active. Below the tabs, there is a text prompt: 'Describe the criteria to use when searching for matching records.' A list of fields is shown on the left, each with a checkbox. The 'Address Lines' checkbox is checked and highlighted. Other checked fields include 'City', 'First Name', 'Last Name', 'State/Province', and 'ZIP/Postcode'. On the right side of the dialog, there is an unchecked checkbox for 'Allow partial field match' and a text input field labeled 'Match the first' followed by 'characters'.

Field	Checked
Address Lines	Yes
Birth Date	No
City	Yes
Country	No
Ethnicity	No
First Name	Yes
Gender	No
Last Name	Yes
Maiden Name	No
Marital Status	No
Middle Name	No
Nickname	No
NZ City	No
NZ Suburb	No
Religion	No
SSN	No
State/Province	Yes
Suffix 1	No
Suffix 2	No
Title 1	No
Title 2	No
ZIP/Postcode	Yes

2. On the People tab, mark the checkbox next to the fields you want to search for matching records. For example, mark the **Last name** checkbox to search for people with the same last name in both databases.

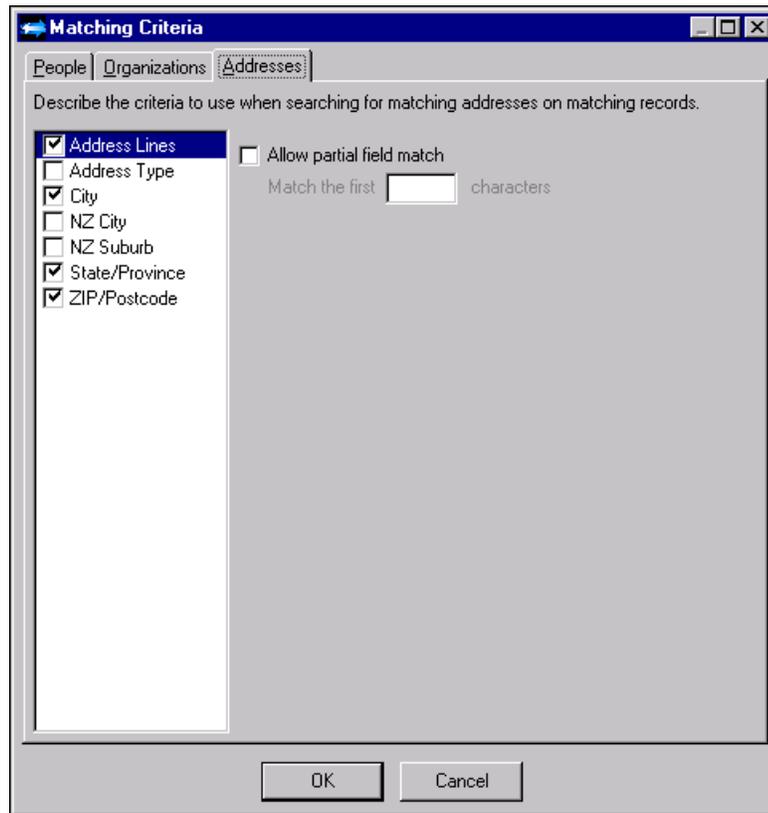
We recommend you include **First Name**, **Middle Name**, **Last Name**, **Suffix 1**, and **SSN**.

3. The options that appear on the right of the screen depend on the field selected. Options include:
 - **Allow partial field match** - This helps find records that begin similarly. If you mark this checkbox, enter a number of characters in **Match the first [] characters**. Marking this checkbox helps find matching records that begin similarly. For example, if you enter the number “5”, the first five characters of the field are matched. If you are including Zip Code, this would match both the Zip Codes of “29464” and “29464-1234”.
 - **Allow match if middle name included in the first name field** - This allows you to match by first name even if an additional name is included in the **First Name** field.
 - **Check for match with nickname field** - This allows you to match a name entered in the **First Name** field with a name entered in the **Nickname** field.
 - **Exact match establishes record match** - For the **SSN** field, this allows you to designate that an exactly matching SSN automatically matches the records, overriding any discrepancies in other fields.
4. Click the Organizations tab.



5. Mark the checkbox next to the fields you want to search for matching records. For example, mark the **Organization name** checkbox to search for companies with the same name in both databases.

6. Click the Addresses tab.



7. Mark the checkbox next to the fields you want to search for matching addresses on matching records.
8. To save your matching criteria and return to the Integration page, click **OK**.

Matching Addresses

When matching addresses on matching records, the program ignores punctuation and uses address abbreviation equivalents to search for addresses that are the same but may be punctuated or abbreviated differently.

Punctuation. When searching for duplicate addresses, the following punctuation is ignored in address text fields: hyphen, colon, apostrophe, period, semicolon, carriage return/line feed, and parenthesis. This punctuation is also ignored in phone types with a phone number type of Telephone Number, Fax Number, or Other, but not in phone types with a phone number type of Email Address or Web Address/URL.

Address abbreviation equivalents. The program uses address abbreviation equivalents when looking for matching records and determining data conflicts. You should be aware that if you use abbreviation equivalents, data conflicts may not appear (such as for “Street” vs. “St.”), but the value may be updated on the records.

Address	Equivalent	Address	Equivalent	Address	Equivalent
Annex	Anx	Freeway	Fwy	Rest	Rst
Apartment	Apt	Gardens	Gdns	Ridge	Rdg
Arcade	Arc	Gateway	Gtwy	River	Riv
Avenue	Ave	Glen	Gln	Road	Rd
Bayou	Byu	Green	Grn	Shoal	Shl
Beach	Bch	Grove	Grv	Shoals	Shls
Bend	Bnd	Harbor	Hbr	Shore	Shr
Bluff	Blf	Haven	Hvn	Shores	Shrs
Bottom	Btm	Heights	Hts	Spring	Spg
Boulevard	Bld	Highway	Hwy	Springs	Spgs
Branch	Br	Hill	Hl	Square	Sq
Bridge	Brg	Hills	Hls	Station	Sta
Brook	Brk	Hollow	Holw	Stravenue	Stra
Burg	Bg	Inlet	Inlt	Stream	Strm
Bypass	Byp	Island	Is	Street	St
Camp	Cp	Islands	Iss	Summit	Smt
Canyon	Cyn	Isle	Isle	Terrace	Ter
Cape	Cpe	Junction	Jct	Trace	Trce
Causeway	Cswy	Key	Ky	Track	Trk
Center	Ctr	Knolls	Knls	Trail	Trl
Circle	Cir	Lake	Lk	Trailer	Trlr
Cliffs	Clfs	Lakes	Lks	Tunnel	Tunl
Club	Clb	Landing	Lndg	Turnpike	Tpke
Corner	Cor	Lane	Ln	Union	Un
Corners	Cors	Light	Lgt	Valley	Vly
Course	Crse	Loaf	Lf	Viaduct	Via
Court	Ct	Locks	Lcks	View	Vw
Courts	Cts	Lodge	Ldg	Village	Vlg
Cove	Cv	Manor	Mnr	Ville	Vi

Address	Equivalent	Address	Equivalent	Address	Equivalent
Creek	Crk	Meadows	Mdws	Vista	Vis
Crescent	Cres	Mill	MI	Wells	Wls
Crossing	Xing	Mills	Mls	West	W
Dale	DI	Mission	Msn	East	E
Dam	Dm	Mount	Mt	North	N
Divide	Dv	Mountain	Mtn	South	S
Drive	Dr	Neck	Nck	Northeast	NE
Estates	Est	Orchard	Orch	Northwest	NW
Expressway	Expy	Pkwy	Pky	Southeast	SE
Extension	Ext	Parkway	Pky	Southwest	SW
Falls	Fls	Pines	Pnes	First	1 or 1st
Ferry	Fry	Place	Pl	Second	2 or 2nd
Field	Fld	Plain	Pln	Third	3 or 3rd
Fields	Flds	Plains	Plns	Fourth	4 or 4th
Flats	Flt	Plaza	Plz	Fifth	5 or 5th
Ford	Frd	Point	Pt	Sixth	6 or 6th
Forest	Frst	Port	Prt	Seventh	7 or 7th
Forge	Frg	Prairie	Pr	Eighth	8 or 8th
Fork	Frk	Radial	Radl	Ninth	9 or 9th
Forks	Frks	Ranch	Rnch	Tenth	10 or 10th
Fort	Ft	Rapids	Rpds		

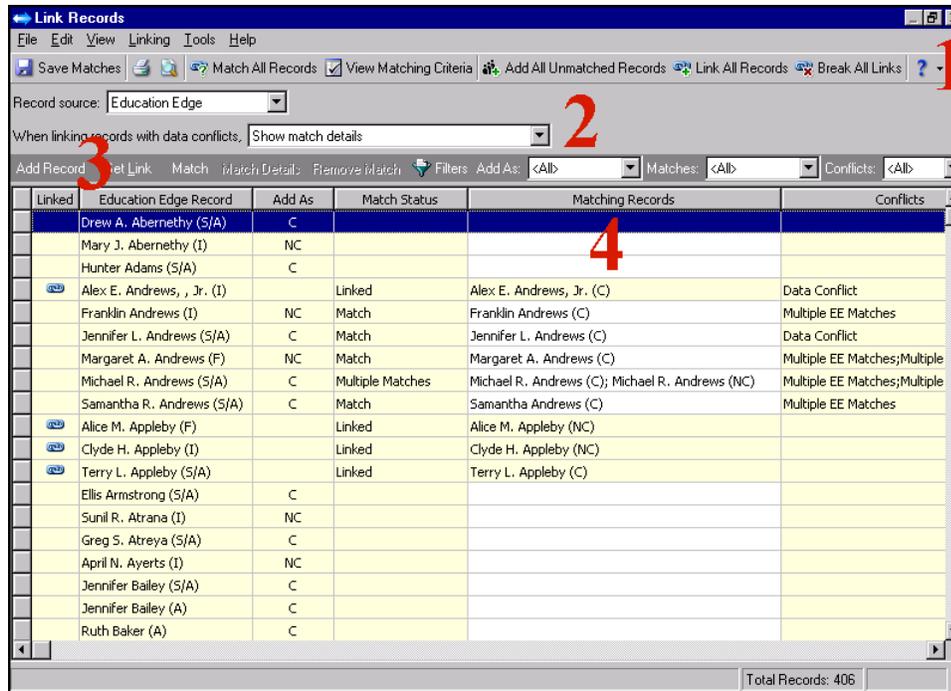
Linking Records

Based on your matching criteria, the program can look for matching records in *The Education Edge* and *The Raiser's Edge*. You can review details of the match to determine if the records are truly a match. You can then link the matching records.

If a record in the source database does not have a match, you can add the record to the target database and link the records.

Parts of the Link Records Screen

There are four sections of the Link Records screen you should understand before proceeding.



1: Toolbar

Using the toolbar, you can perform actions affecting all the records in the grid.

Save Matches. To save matches for all records that appear in the grid based on your mapped record types, click **Save Matches**. This does not save matches for records you manually added to the grid.

Print. To print a Matched Reports Report, click **Print**. For more information about the Matched Records Report, see “Printing the Matched Records Report” on page 51.

Preview. To preview a Matched Reports Report, click **Preview**. For more information about the Matched Records Report, see “Printing the Matched Records Report” on page 51.

Match All Records. To search for matches for all records currently appearing in the grid based on your matching criteria, click **Match All Records**.

View Matching Criteria. To view matching criteria, click **View Matching Criteria**. For more information about matching criteria, see “Setting Up Matching Criteria” on page 24.

Add All Unmatched Records. To add all unmatched records in the grid as records in the target database, click **Add All Unmatched Records**. Be careful when using this because this does not check for matching records before adding the records, you should have already searched for matches.

Link All Records. To link all records in the grid with single matching records in the target database, click **Link All Records**.

 We refer to the database you select in the **Record source** field as “data source” or “source database” (or “record source” if referring to a record). The database you do not select is called the “target database” (or “target record” if referring to a record).

Break All Links. To remove all links in the grid, click **Break All Links**.

Remove Ineligible Records. When you edit records from the Link Records screen, to remove records which no longer meet the integration setup criteria, click **Remove Ineligible Records**.

2: Fields

Fields appear so you can select the data source and determine how to handle data conflicts when linking records.

Record Source. Select whether to use *The Education Edge* or *The Raiser’s Edge* as the data source. Your selection determines the records that appear in the grid. When linking records, we recommend you work first in the *Education Edge* view, then in the *Raiser’s Edge* view.

When linking records with data conflicts. Select what to do with data conflicts between records you are linking.

- If you select “Show match details”, when you set a link with a data conflict, the Match Details screen appears for your review. You can edit the conflicting information on the record before setting the link.
- If you select “Overwrite with data from The Education Edge”, any data found on a matching record in *The Raiser’s Edge* is overwritten by the data on the record in *The Education Edge*.
- If you select “Overwrite with data from The Raiser’s Edge”, any data found on a matching record in *The Education Edge* is overwritten by the data on the record in *The Raiser’s Edge*.

Linking Relationships

Relationship labels are not consistent between *Raiser’s Edge* records and *The Education Edge* records.

In some cases, the relationship types for the same records will be different in the *Raiser’s Edge* database versus the *The Education Edge* database. For example, *Raiser’s Edge* records may use a Parent/Child relationship and *The Education Edge* records may use Mother/Daughter or Father/Son. The system will apply the relationship types to the linked records based on the following settings in the linking grid. If the drop-down menu for **When linking records with data conflicts** is set to:

Overwrite with data from the *The Education Edge*

- The values on the *The Education Edge* records will be applied to the records in *Raiser’s Edge*.

In the example above, the Mother/Daughter or Father/Son relationships will be applied to the appropriate records in the *Raiser’s Edge*.

Overwrite with data from the *Raiser’s Edge*

- The values on the *Raiser’s Edge* records will be applied to the records in *The Education Edge*.

In the example above, the Parent/Child relationships will be applied to records in the *The Education Edge*.

Show match details

- The system will apply the values from the record that was most recently updated.

This can vary from record to record, and some records may get Parent/Child relationship labels and some may get Father/Son or Mother/Daughter labels.

To determine which set of labels will apply, open the record and go to record properties to see the date last changed. The record with the most recent date will be the “dominant” record.

3: Action Bar

Using the action bar above the grid, you can perform actions or view details for a single row, and filter the rows that appear on the grid.

Add Record. To add the record to the target database, select a row and click **Add Record**.

Set Link. To set a link between the record and a record in the target database, select a row click **Set Link**.

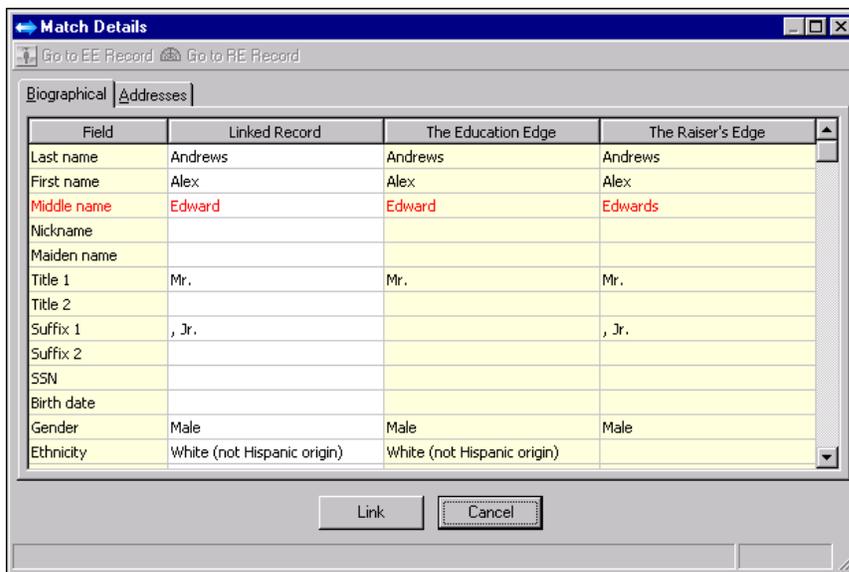
Break Link. To break a link between the record and a record in the target database, select a row and click **Break Link**.

Match. To search for a matching record in the target database based on your matching criteria, select a row and click **Match**.

Match Details. To view details for a match based on your matching criteria, select a row and click **Match Details**. The Match Details screen appears. If there are data conflicts between the mapped fields, the conflicts appear in red.

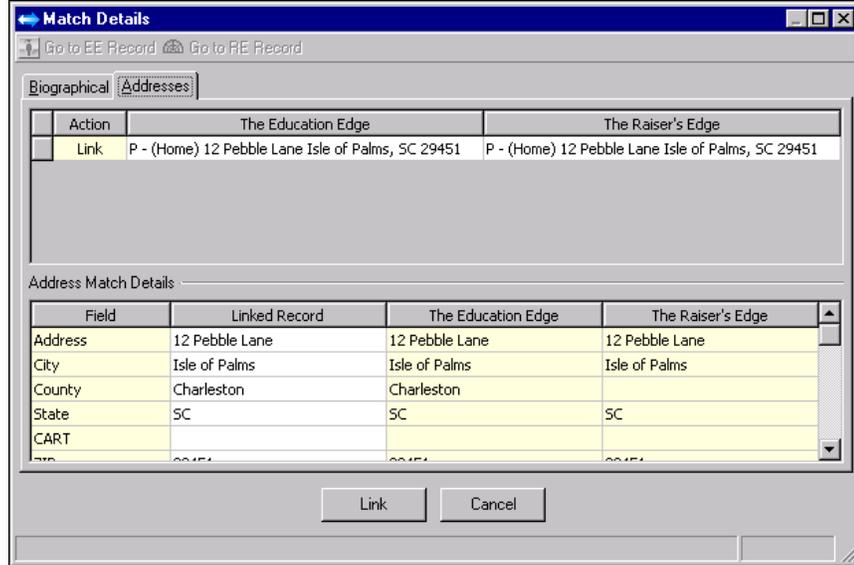
On the Biographical tab, columns appear for the value in *The Education Edge* and the value in *The Raiser’s Edge*. If there is a conflict, in the **Linked Record** column, you can select which of the values to use on the records when you link them.

 If multiple matches are found in the target database, the Multiple Matches screen appears first, then you can select a match and click **Match Details**.

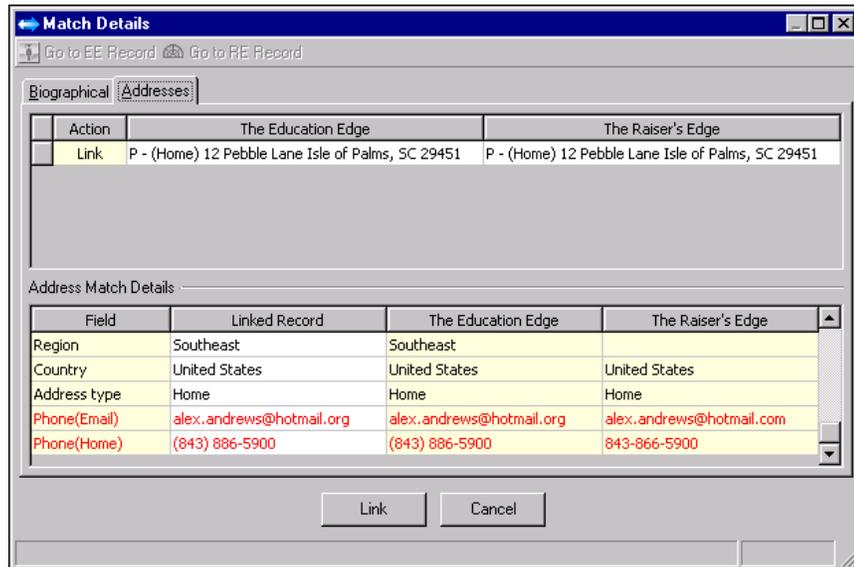


It is important that you remove any duplicate addresses and fix any incorrect address sharing before integrating the databases.

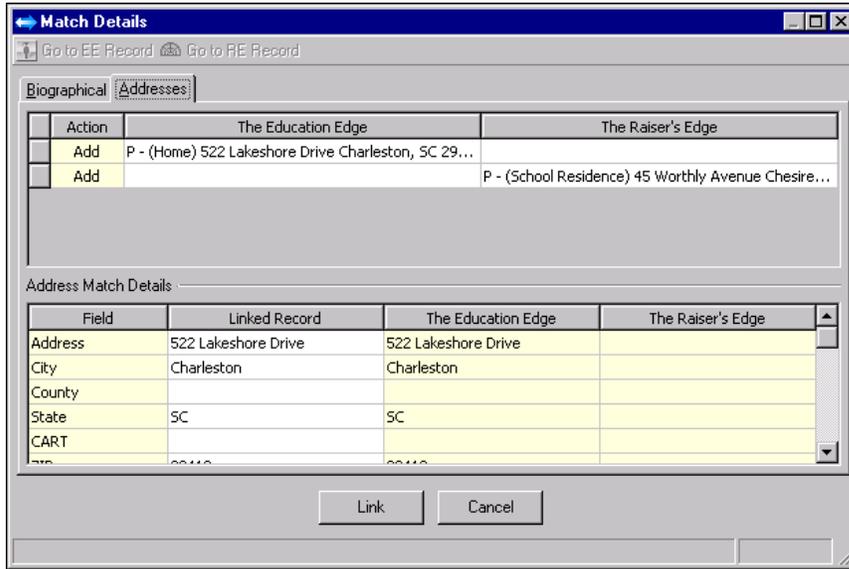
On the Addresses tab, review the address information that will be linked. If the addresses match, “Link” appears in the **Action** column of the first grid, and the matching addresses appear on the same row in **The Education Edge** and **The Raiser’s Edge** columns.



In the **Address Match Details** grid, you can view the data in mapped fields. Be aware that even if addresses match, there could be other conflicting information. If there is a conflict, in the **Linked Record** column, you can select which of the values to use on the records when you link them.



If addresses do not match, “Add” appears in the **Action** column of the first grid, and the addresses appear in the columns corresponding to the database in which they exist. To view the details of each address, select the row of the address in the first grid and view the details in the **Address Match Details** grid.

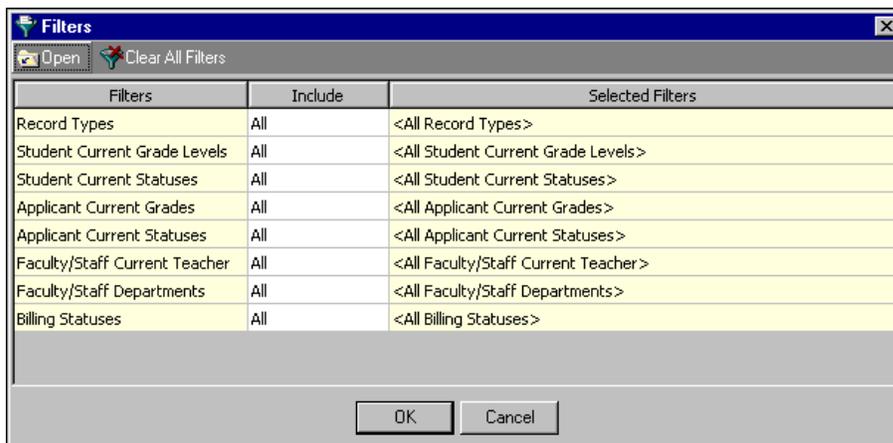


If addresses are not seen as a match, you can still match them if necessary. To match two addresses, select an address in the blank column of the row of the address to match it to. The rows of those addresses are merged into a row with “Link” in the **Action** column, and you can resolve data conflicts between the addresses in the **Address Matching Details** grid.

To unmatch records in a row with “Link” in the **Action** column, select a blank instead of an address in a column. This separates the addresses into separate rows with “Add” in the **Action** column.

Remove Match. To remove a match between the record in the source database and the record in the target database, select a row and click **Remove Match**.

Filters. To narrow the records from the source database that appear on the Link Records screen, click **Filters**. The Filters screen appears.



 If you have **Student Billing** but not **Registrar's Office**, Student Enrollment Status appears as a filter instead of Student Current Status.

 **Academy Manager** matches appear automatically when you access the Link Records screen. If you remove an **Academy Manager** match, the Academy ID of the match is deleted. However, if you accidentally remove an **Academy Manager** match, you should be able to find the matching records again by using matching criteria instead.

Add As. In the **Add As** field, you can filter by Constituent or NonConstituent if *The Education Edge* is the record source. If *The Raiser's Edge* is the record source, you can filter by Individual or Organization.

Matches. In the **Matches** field, you can select to show records in the grid based on matching status:

- <All> - Shows all records regardless of matching status.
- Any Match - Shows only records that are matched to a record in the target database based on your matching criteria.
- All Unmatched Records - Shows only records that are not matched to a record in the target database based on your matching criteria.
- All Unlinked Records - Shows only records not linked to a record in the target database.
- Linked - Shows only records that are linked to a record in the target database.
- Match - Shows only records that are matched to a single record in the target database based on your matching criteria.
- Multiple Match - Shows only records that are matched to multiple records in the target database based on your matching criteria.
- Academy Manager Match - Shows only records with an Academy ID that matches an Academy ID on a record in the target database.

Conflicts. In the **Conflicts** field, you can select to show records in the grid based on conflicts:

- <All> - Shows all records regardless of conflicts.
- Data Conflict - Shows only records with different values in mapped fields.
- Multiple EE Match - Shows only records with more than one matching record in the *Education Edge* database.
- Multiple RE Match - Shows only records with more than one matching record in the *Raiser's Edge* database.
- Multiple Address Matches - Shows only matching records with multiple address matches.
- <None> - Shows only records without conflicts.

4: Columns in Grid

Columns appearing in the grid depend on your source database and any filters you set on the action bar.

Linked. An icon appears in this column when records are linked between the source and target database.

Education Edge/Raiser's Edge Record. The **Education Edge Record** column displays the records from *The Education Edge* when "Education Edge" is selected in **Record source**. The **Raiser's Edge Record** column displays the records from *The Raiser's Edge* when "Raiser's Edge" is selected in **Record source**. The type of record is designated in parentheses: A for applicant, S for student, S/A for student/applicant, I for individual, F for faculty/staff member, O for organization, NC for nonconstituent, and C for constituent.

In the last row on the grid, you can click the binoculars to add a record to the grid from the source database. You can also select records to add to the grid by selecting **Linking, Add <Source Database> Records to Grid** from the menu bar.

Add As. The **Add As** column displays a designation for what type of record the record will become in the target database. If "Education Edge" is selected in **Record source**, C appears for constituent and NC appears for nonconstituent. If "Raiser's Edge" is selected in **Record source**, I appears for individual and O appears for organization.

Match Status. The **Match Status** column displays that status of the match, which can include:

- **Linked** - The record is linked to a record in the target database.
- **Match** - The record is matched to a single record in the target database based on your matching criteria.
- **Multiple Matches** - The record matches more than one record in the target database based on your matching criteria.
- **Academy Manager Match** - The record's Academy ID matches a record's Academy ID in the target database.
- If the **Match Status** column is blank, either you have not tried to match the record using your matching criteria or no matches were found based on your matching criteria.

Matching Records. Matching records from the target database appear. You can also click the binoculars to search for records.

Conflicts. Conflicts between matching records appear.

- **Data Conflict** - The records have different values in mapped fields. You can click **Match Details** to view the data.
- **Multiple EE Match** - More than one matching record is in the *Education Edge* database.
- **Multiple RE Match** - More than one matching record is in the *Raiser's Edge* database.
- **Multiple Address Match** - More than one address matches on a matching record.

 Academy IDs of zero are not considered an Academy Manager Match.

 *Academy Manager* matches appear automatically when you access the Link Records screen. If you remove an *Academy Manager* match, the Academy ID of the match is deleted. However, if you accidentally remove an *Academy Manager* match, you should be able to find the matching records again by using matching criteria instead.

 Though this procedure shows *The Education Edge*, the steps are similar if you are in *The Raiser's Edge*.

 To add other records to the grid, click **Linking, Add Education Edge Records to Grid** from the menu bar. You can select records individually or using a query.

 If you remove an *Academy Manager* match, the Academy ID of the match is deleted. However, if you accidentally remove an *Academy Manager* match, you should be able to find the matching records again by using matching criteria instead.

 Matching records does not affect current *Academy Manager* matches.

 If the matches do not look correct to you, or you have a lot of multiple matches or multiple address matches, you may need to edit your matching criteria. For more information about matching criteria, see “Setting Up Matching Criteria” on page 24.

 In the **Conflicts** field above the grid, you can select the types of conflicts to show in the grid. For example, you may want to first work with matching records without conflicts.

Linking Records for the First Time

When you access the Link Records screen for the first time, you have many records to sort through and link. You can match them with records in the target database or add them to the target database.

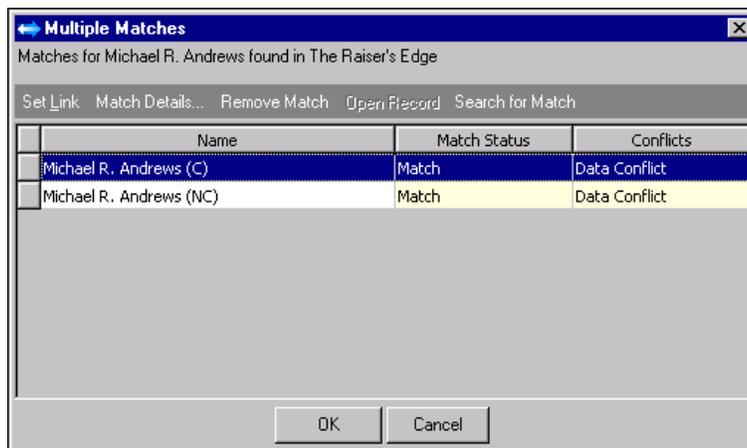
➤ Linking records for the first time

1. On the Integration page, click **Link records with the Raiser's Edge**. The Link Records screen appears.
2. In the **Record source** field, select “The Education Edge”. The records that appear in the grid when you first access the screen depend on the record types you have mapped. Also, if you previously used *Academy Manager* to integrate your programs, *Academy Manager* matches based on Academy IDs appear automatically.
3. First, handle any *Academy Manager* matches you have. In the **Matches** field above the grid, you can select “Academy Manager Match” to show only the *Academy Manager* matches in the grid.
 - a. If the match is correct, select the row and click **Set Link** on action bar. Or, you can click **Link All Records** on the toolbar to set the links for all of the matches appearing in the grid after you have reviewed them all.
 - b. If the match is not correct, select the row and click **Remove Match** on the action bar.
4. On the toolbar, click **Match All Records**.
Be patient, this process can take some time. After the program is finished matching records based on your matching criteria, you can view the status of the matching process in the **Match Status** column.
5. In the **Matches** field above the grid, select “Match” to review all single matches in the grid.
 - a. If “Multiple EE Matches” appears in the **Conflicts** column, there is more than one matching record in the *Education Edge* database. You should verify that this is not a duplicate record in *The Education Edge* before proceeding. For information about searching for and merging duplicate records in *The Education Edge*, see the *Administration Guide for The Education Edge*.
 - b. If “Data Conflict” appears in the **Conflicts** column, you can resolve the conflicts on the Match Details screen. Select the row and click **Match Details** on the action bar. For information about the Match Details screen, see “Match Details” on page 32.
 - c. If “Multiple Address Matches” appears in the **Conflicts** column, more than one matching address has been found. None of the matching addresses found can be linked and duplicate addresses may be added unless you resolve this conflict on the Match Details screen. Select the row and click **Match Details** on the action bar. For information about the Match Details screen, see “Match Details” on page 32.

- d. If the match is correct, select the row and click **Set Link** on action bar. Or, you can click **Link All Records** on the toolbar to set the links for all of the matches appearing in the grid after you have reviewed them all.

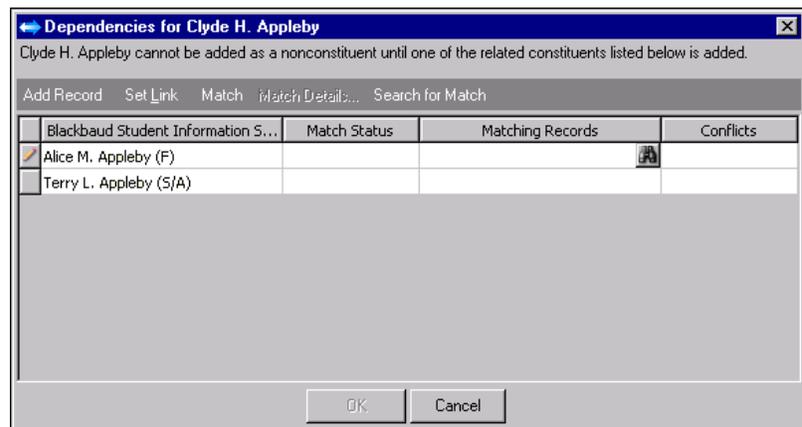
If you left any data conflicts unresolved, your selection in the **When linking records with data conflicts** field above the grid determines whether the Match Details screen appears so you can edit the conflicting information, or the program automatically uses the information from the *Education Edge* record or the *Raiser's Edge* record.

- e. If the match is not correct, select the row and click **Remove Match** on the action bar.
6. In the **Matches** field above the grid, select "Multiple Match" to review all multiple matches in the grid.
- a. If "Multiple RE Matches" appears in the **Conflicts** column, there is more than one matching record in the *Raiser's Edge* database. To review details of a match based on your matching criteria, select the row and click **Match Details** on the action bar. The Multiple Matches screen appears.



- b. To review each match, select the row and click **Match Details**. For information about the Match Details screen, see "Match Details" on page 32.
- c. If you determine that only one of the matches is a correct match, select the row of each incorrect match and click **Remove Match**.
Then select the row of the correct match. If there are data conflicts, click **Match Details** again to resolve the conflicts with the correct matching record. You can click **Link** on the Match Details screen to set the link.
- d. If the records are duplicate records, click **Cancel**. You should resolve this in the target database before returning to the Link Records screen. You can search for and merge duplicate records in *Administration* in the program. For information about searching for and merging duplicate records, see the *Administration Guide for The Education Edge* or the *Configuration & Security Guide for The Raiser's Edge*.

7. In the **Matches** field above the grid, select “All Unmatched Records” to review all unmatched records in the grid.
 - a. To search for a matching record in the target database, click in the **Matching Records** column of the row, then click the binoculars to search for a record.
 - b. To add the record to the target database and link the two records, select the row and click **Add Record** on the action bar. Or, to add every unmatched record on the grid at once, after reviewing them all, click **Add All Unmatched Records** on the toolbar.
 - c. If a record cannot be added because it depends upon another record being linked first, the Dependencies screen appears. For example, you cannot add a spouse of a faculty/staff member before adding the faculty/staff member. From the Dependencies screen, you can attempt to match the other records or add the records. After the other records are linked, you can click **OK** to add the original record.



8. In the **Record source** field, select “The Raiser’s Edge” and repeat the steps in this procedure.

We recommend that you always use *The Education Edge* as a source first then use *The Raiser’s Edge* as a source each time you link records. By using both, you ensure that necessary information is added between the records, for example, new student records and their relationships are added to *The Raiser’s Edge* and updated primary business and spouse information is moved to *The Education Edge*.

Linking Records on a Regular Basis

After linking records for the first time, you need to access the Link Records screen on a regular basis to link new records. You can match them with records in the target database or add them to the target database.

➤ Linking records on a regular basis

1. On the Integration page, click **Link records with the Raiser’s Edge**. The Link Records screen appears.

 Though this procedure shows *The Education Edge*, the steps are similar if you are in *The Raiser’s Edge*.

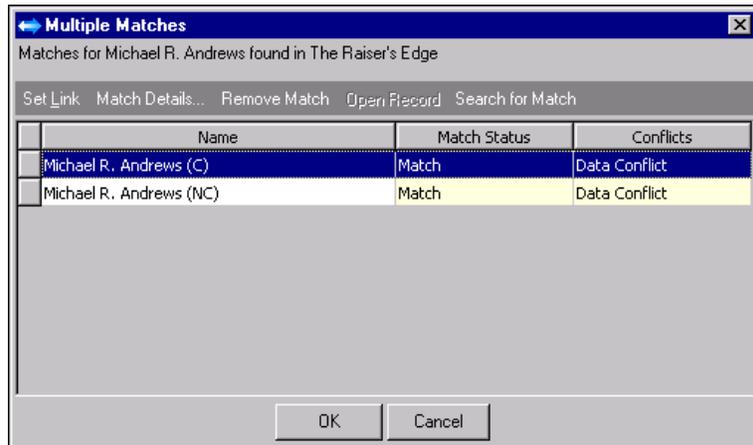
2. In the **Record source** field, select “The Education Edge”. The new records that appear in the grid when you open the screen depend on the record types you have mapped.
3. In the **Matches** field on the action bar, select “All Unlinked Records”.
4. On the toolbar, click **Match All Records**. After the program is finished matching records based on your matching criteria, you can view the status of the matching process in the **Match Status** column.
5. If “Match” appears in the **Match Status** column, the record matches a single record in the target database.
 - a. If “Multiple EE Matches” appears in the **Conflicts** column, there is more than one matching record in the *Education Edge* database. You should verify that this is not a duplicate record in *The Education Edge* before proceeding. For information about searching for and merging duplicate records in *The Education Edge*, see the *Administration Guide for The Education Edge*.
 - b. If “Data Conflict” appears in the **Conflicts** column, you can resolve the conflicts on the Match Details screen. Select the row and click **Match Details** on the action bar. For information about the Match Details screen, see “Match Details” on page 32.
 - c. If “Multiple Address Matches” appears in the **Conflicts** column, more than one matching address has been found. None of the matching addresses found can be linked and duplicate addresses may be added unless you resolve this conflict on the Match Details screen. Select the row and click **Match Details** on the action bar. For information about the Match Details screen, see “Match Details” on page 32.
 - d. If the match is correct, select the row and click **Set Link** on action bar. Or, you can click **Link All Records** on the toolbar to set the links for all of the matches appearing in the grid after you have reviewed them all.

If you left any data conflicts unresolved, your selection in the **When linking records with data conflicts** field above the grid determines whether the Match Details screen appears so you can edit the conflicting information, or the program automatically uses the information from the *Education Edge* record or the *Raiser’s Edge* record.
 - e. If the match is not correct, select the row and click **Remove Match** on the action bar.
6. If “Multiple Match” appears in the **Match Status** column, the record matches more than one record in the target database.

 To add other records to the grid, click **Linking, Add Education Edge Records to Grid** from the menu bar. You can select records individually or using a query.

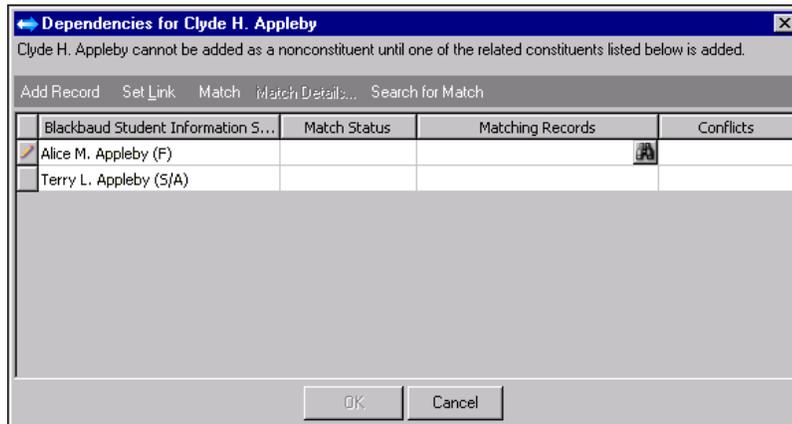
 If the matches do not look correct to you, or you have a lot of multiple matches or multiple address matches, you may need to edit your matching criteria. For more information about matching criteria, see “Setting Up Matching Criteria” on page 24.

- a. If “Multiple RE Matches” appears in the **Conflicts** column, there is more than one matching record in the *Raiser’s Edge* database. To review details of a match based on your matching criteria, select the row and click **Match Details** on the action bar. The Multiple Matches screen appears.



- b. To review each match, select the row and click **Match Details**. For information about the Match Details screen, see “Match Details” on page 32.
 - c. If you determine that only one of the matches is a correct match, select the row of each incorrect match and click **Remove Match**.
Then select the row of the correct match. If there are data conflicts, click **Match Details** again to resolve the conflicts with the correct matching record. You can click **Link** on the Match Details screen to set the link.
 - d. If the records are duplicate records, click **Cancel**. You should resolve this in the target database before returning to the Link Records screen. For information about searching for and merging duplicate records, see the *Administration Guide for The Education Edge* or the *Configuration & Security Guide for The Raiser’s Edge*.
7. If the **Match Status** column is blank, the record does not match any records in the target database.
 - a. To search for a matching record in the target database, click in the **Matching Records** column of the row, then click the binoculars to search for a record.
 - b. To add the record to the target database and link the two records, select the row and click **Add Record** on the action bar. Or, to add every unmatched record on the grid at once, after reviewing them all, click **Add All Unmatched Records** on the toolbar.

- c. If a record cannot be added because it depends upon another record being linked first, the Dependencies screen appears. For example, you cannot add a spouse of a faculty/staff member before adding the faculty/staff member. From the Dependencies screen, you can attempt to match the other records or add the records. After the other records are linked, you can click **OK** to add the original record.



8. In the **Record source** field, select “The Raiser’s Edge” and repeat the steps in this procedure.

We recommend that you always use *The Education Edge* as a source first then use *The Raiser’s Edge* as a source each time you link records. By using both, you ensure that necessary information is added between the records, for example, new student records and their relationships are added to *The Raiser’s Edge* and updated primary business and spouse information is moved to *The Education Edge*.

 To review integration activity on a regular basis, including activities performed when linking records and synchronizing data, print the Integration Activity Report. For more information, see “Printing the Integration Activity Report” on page 60.

Synchronizing Data

When you synchronize data, you keep mapped fields and mapped relationships synchronized. To keep your data consistent in both databases, you should synchronize often. We also recommend you synchronize from a single machine.

You can synchronize data either manually or automatically. We recommend you synchronize every 15 minutes. When your databases have not been synchronized in more than a day, you can experience issues including overwritten data.

Synchronization checks to see which program has the most recent update on the linked records. If the records in both programs updated since the last synchronization, the most recently updated record wins and overwrites the other program’s record. The longer you wait to synchronize, the more likely you will lose record changes in one or both programs.

Synchronization does not keep track of changes in the order in which they were made. If you do not synchronize often, when it does occur, the process may not be able to duplicate the same steps in the other system and data differences may exist. The issue especially occurs with the sharing of address and phone data.

If you have not synchronized often and are concerned about data issues, contact Blackbaud Customer Support.

- To manually synchronize data, click **Synchronize Data** on the Integration page. For more information, see “Manually synchronizing data using the Synchronize Data link” on page 43.

 We recommend that you automatically synchronize data every 15 minutes.

- To automatically synchronize data, you can establish settings in your Microsoft *Scheduled Task Wizard* application. For more information, see “Automatically synchronizing data using the Microsoft Scheduled Task Wizard” on page 43.

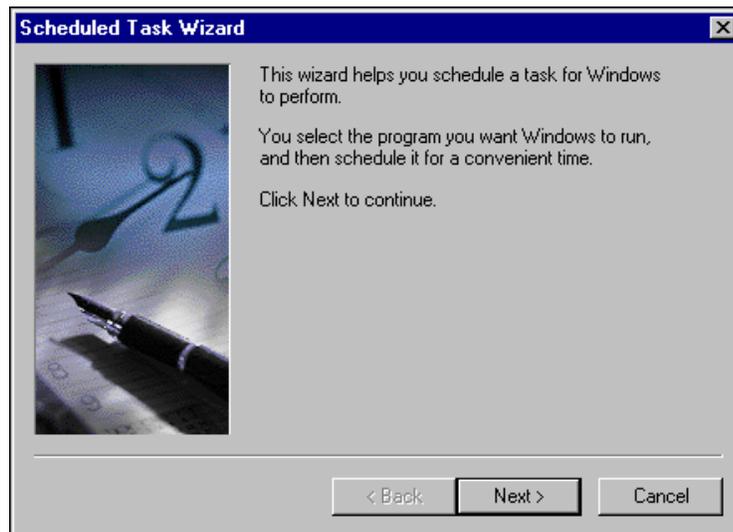
➤ **Manually synchronizing data using the Synchronize Data link**

1. From the Integration page, click **Synchronize Data**. A message appears asking if you want to start the synchronization process.
2. Review the information on the Synchronize data screen, when you are ready, click **Synchronize Now** to synchronize your *Raiser’s Edge* and *Education Edge* data.
3. After the process completes, a confirmation message appears on your screen informing you the synchronization is done.
4. Click **OK**. You return to the Integration page.

➤ **Automatically synchronizing data using the Microsoft Scheduled Task Wizard**

Use the Microsoft Scheduled Task Wizard on a workstation with *The Education Edge* and *The Raiser’s Edge* installed. The synchronization process may impact server performance if run on either database server. As a result, you may want to dedicate a workstation to this task.

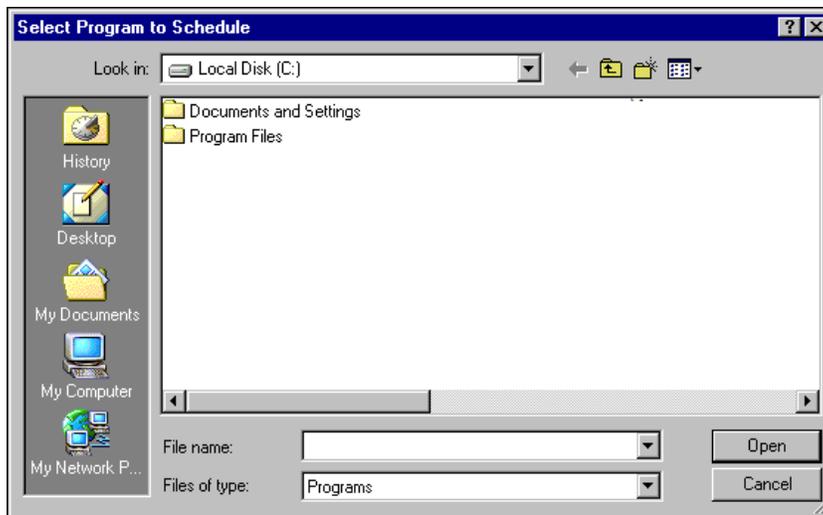
1. From your *Windows* Start menu, select **Settings, Control Panel, Scheduled Tasks**.
2. Click **Add Scheduled Task**. The Scheduled Task Wizard screen appears.



3. Click **Next**. The applications installed on your computer appear.

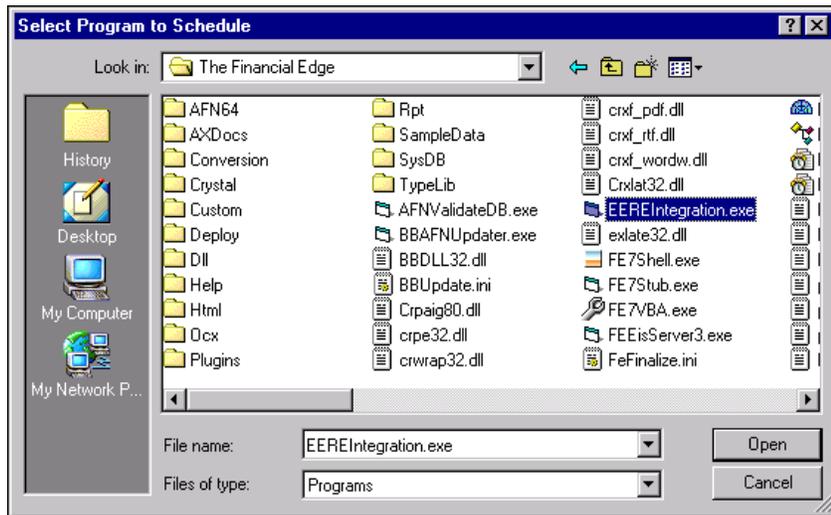


4. Click **Browse**. The Select Program to Schedule screen appears.

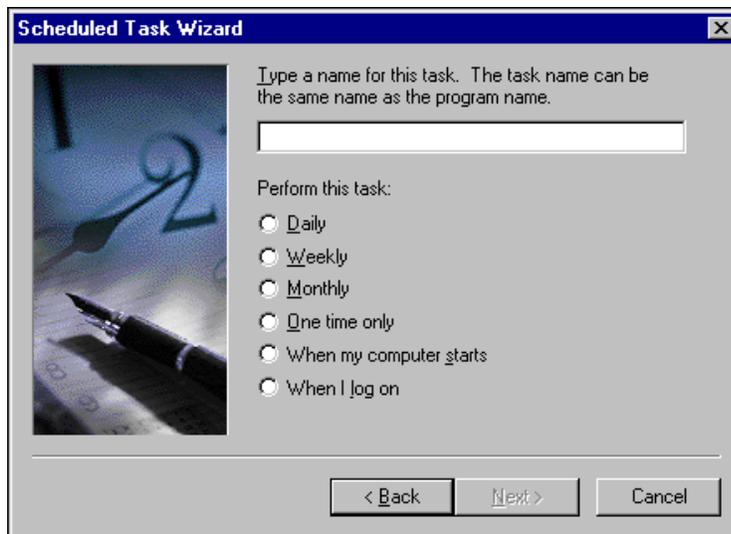


5. On your computer, browse to the Program Files, Blackbaud folder.

- In the Financial Edge folder, select EEREIntegration.exe.

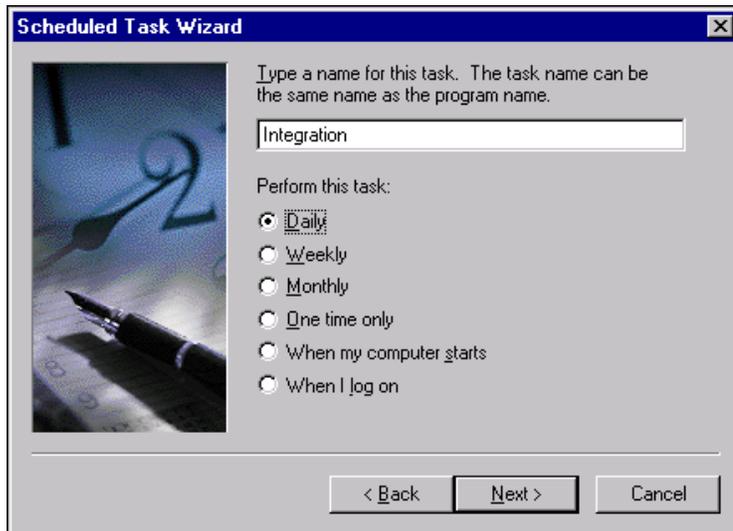


- Click **Open**. You return to the Scheduled Task Wizard.



- In the field, enter a name for the automatic synchronizing process. For example, enter “Integration”.

- In the **Perform this task** frame, select how often to automatically synchronize data. We recommend you mark **Daily**.



- Click **Next**.
- In the **Start time** field, enter the time you want to automatically synchronize data.
- In the **Perform this task** frame, you can select if you want to perform the task every day or just on weekdays.
- In the **Start date** field, enter the date you want to begin automatically synchronizing data.



- Click **Next**.

15. In the **Enter the user name** field, enter the network user name of the individual responsible for synchronizing data.



Scheduled Task Wizard

Enter the name and password of a user. The task will run as if it were started by that user.

Enter the user name: WilliamF

Enter the password:

Confirm password:

< Back Next > Cancel

 Blackbaud recommends creating a separate user account on your network for processing the Microsoft *Scheduled Task Wizard* for your *Raiser's Edge* and *Education Edge* synchronized data.

16. In the **Enter the password** field, enter the password for your network user account for processing the Scheduled Task Wizard.
17. In the **Confirm password** field, confirm the password for your network user account for processing the Scheduled Task Wizard.



Scheduled Task Wizard

Enter the name and password of a user. The task will run as if it were started by that user.

Enter the user name: WilliamF

Enter the password: *****

Confirm password: *****

< Back Next > Cancel

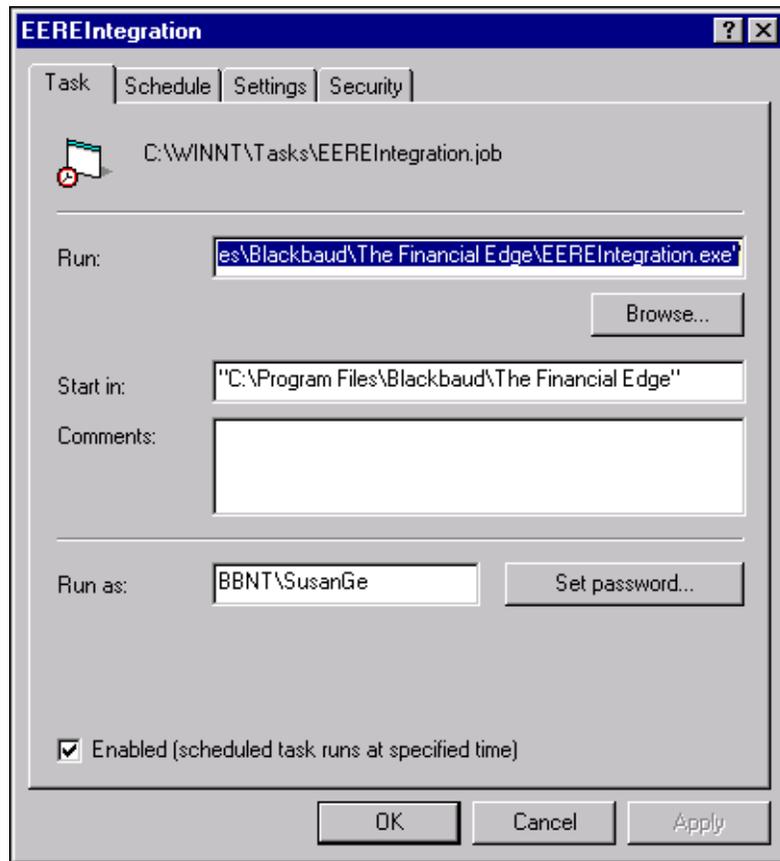
- Click **Next**. A confirmation message appears informing you that you have completed establishing the automatic scheduled task.



- Mark the **Open advanced properties for this task when I click Finish** checkbox.
- Click **Finish**.

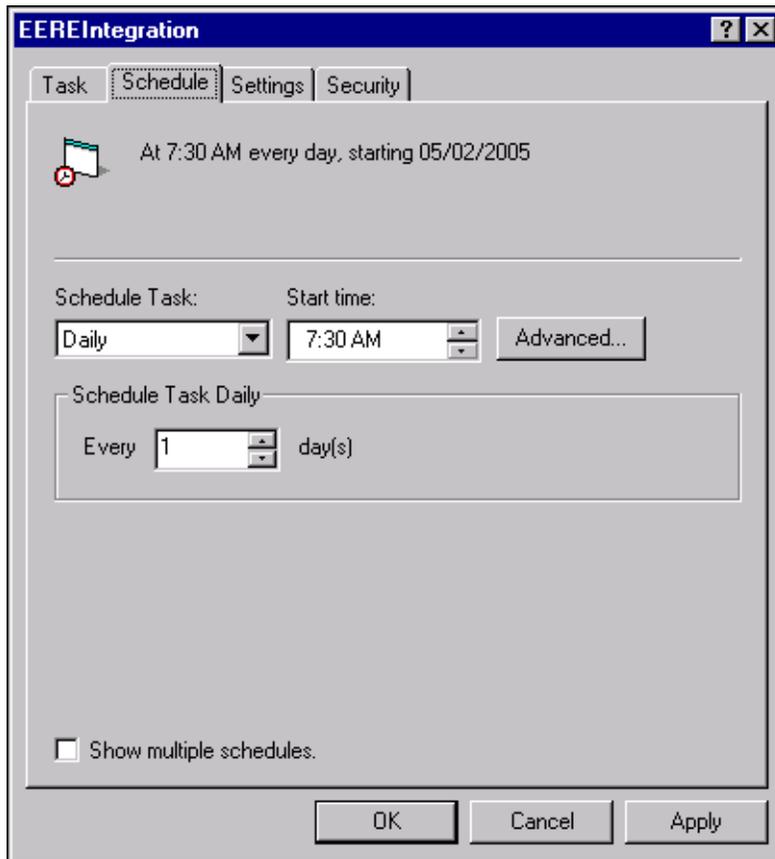
 You can disable the task by unmarking the **Enable** checkbox if you need to install a patch or update. If the task runs while an update occurs, the workstation cannot be updated.

21. If you marked **Open advanced properties for this task when I click Finish**, a screen appears for the task you created.

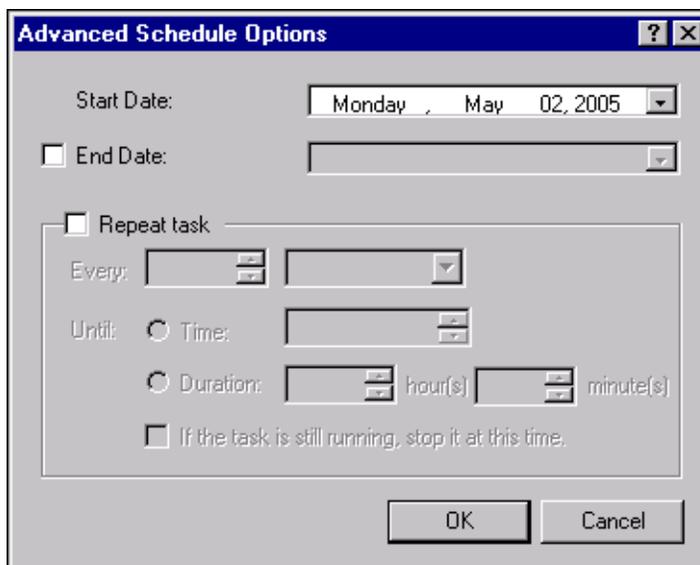


22. For the process to access the correct database, you need to add more information to the end of the text in the **Run** field.
- To be prompted each time the task is scheduled to run, enter a space after the last quotation mark and enter: `/p<database number> /n<serial number>`
 - For the task to run without prompting you, enter a space after the last quotation mark and enter: `/p<database number> /n<serial number> /s`

23. Click the Schedule tab.

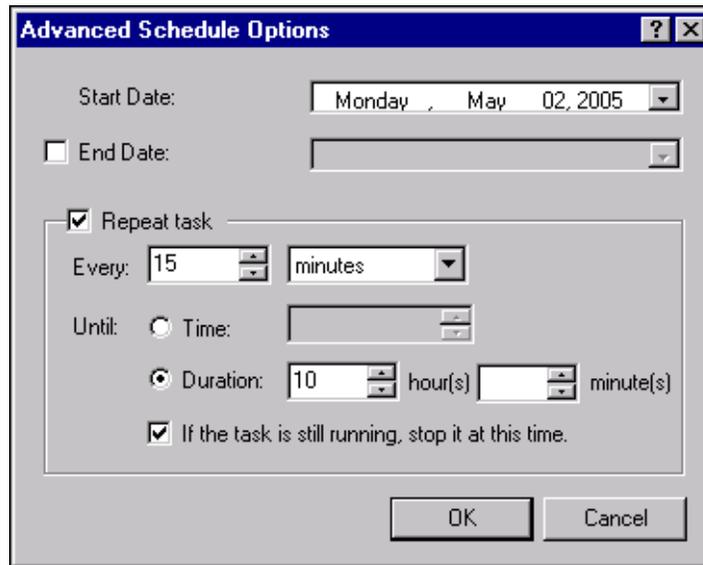


24. Click **Advanced**. The Advanced Schedule Options screen appears.



25. Mark **Repeat task** and select how often and for how long to run the task.

We recommend you run the task during your normal business hours, this process should not interfere with your daily operations. We strongly recommend you do not run this task during the time that you perform backups. If this task starts while a backup is running, it cannot continue and tries again at the next scheduled time. If this task is running and a backup starts, the backup fails and does not try again until scheduled, typically the next night.



26. Click **OK** to return to the screen for the task you created. Click **OK** to close this screen.

Printing the Matched Records Report

To review a report of matches found for unlinked records, print the Matched Records Report. This report lists the information on the Link Records screen in report format. For more information about this screen, see “Linking Records” on page 29.

General Tab

On the General tab, you set parameters for the activity included in the report and set the report's orientation.

The screenshot shows a dialog box titled "New Matched Records Report" with a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar. Below the toolbar are four tabs: "1. General", "2. Filters", "3. Columns", and "4. Format". The "General" tab is active. The "Record source" is "The Education Edge". The "Show matches for:" dropdown is set to "All records". There are three checkboxes: "Include addresses and address match status", "Include phones", and "Include relationships", all of which are unchecked. The "Report orientation:" dropdown is set to "Portrait". At the bottom, there are buttons for "< Back", "Next >", "Cancel", "Print", "Preview", and "Layout".

Record Source. *The Education Edge* is the considered the record source for this report.

Show Matches for. In this field, select “All records”, “People”, or “Organizations”.

Include address and action. Mark this checkbox to include address matching information, including the action. If addresses match, “Link” is the action indicating the address will be linked to an address in the target database. If addresses do not match, “Add” is the action indicating the address will be added to the target database.

Include phones. If you include addresses, you can also include phones.

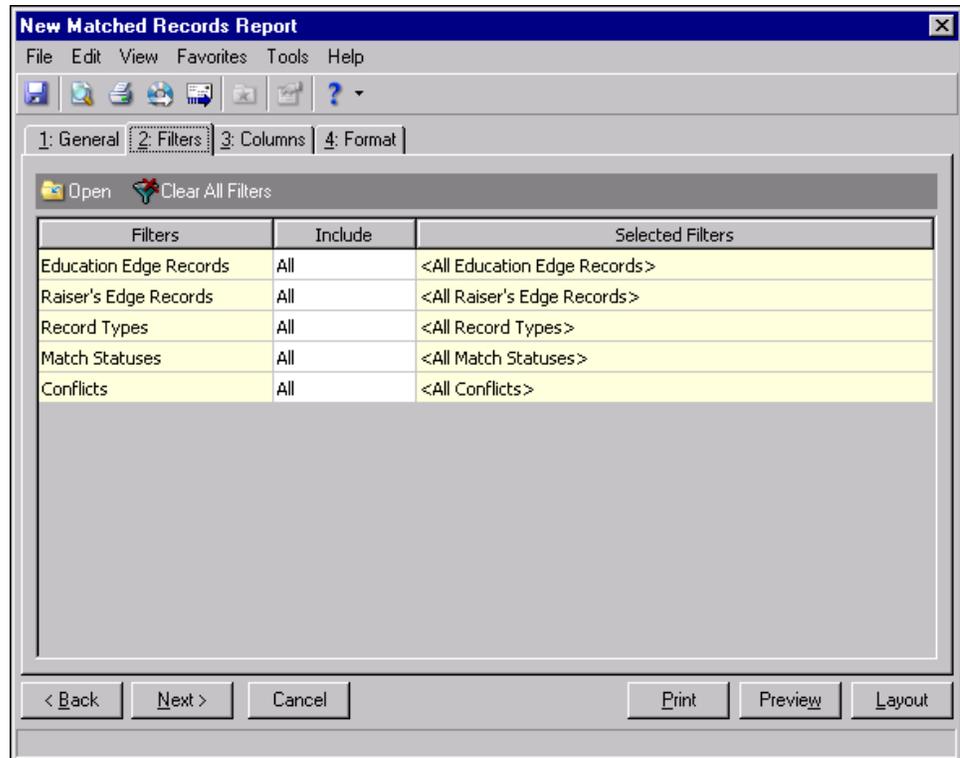
Include relationships. If you are including people, you can include their relationships by marking this checkbox.

Report orientation. In this field, select “Portrait” or “Landscape”.

 Click **Preview** at any time to view the report as it will print using your selections and filters. Click **Layout** to view a sample layout of the report without data.

Filters Tab

On the Filters tab, you can filter the records appearing in the report.



 You can also double-click a filter in the grid to open the selection screen.

 A filter is a requirement records must meet to be included in a report. For example, if you apply the Record Types filter, only records of the types you select appear in the report.

Open. Select a filter in the grid and click **Open** on the action bar to access the selection screen where you can select specific filters for the report.

Clear All Filters. Click **Clear All Filters** on the action bar to remove all previously selected filters from the report.

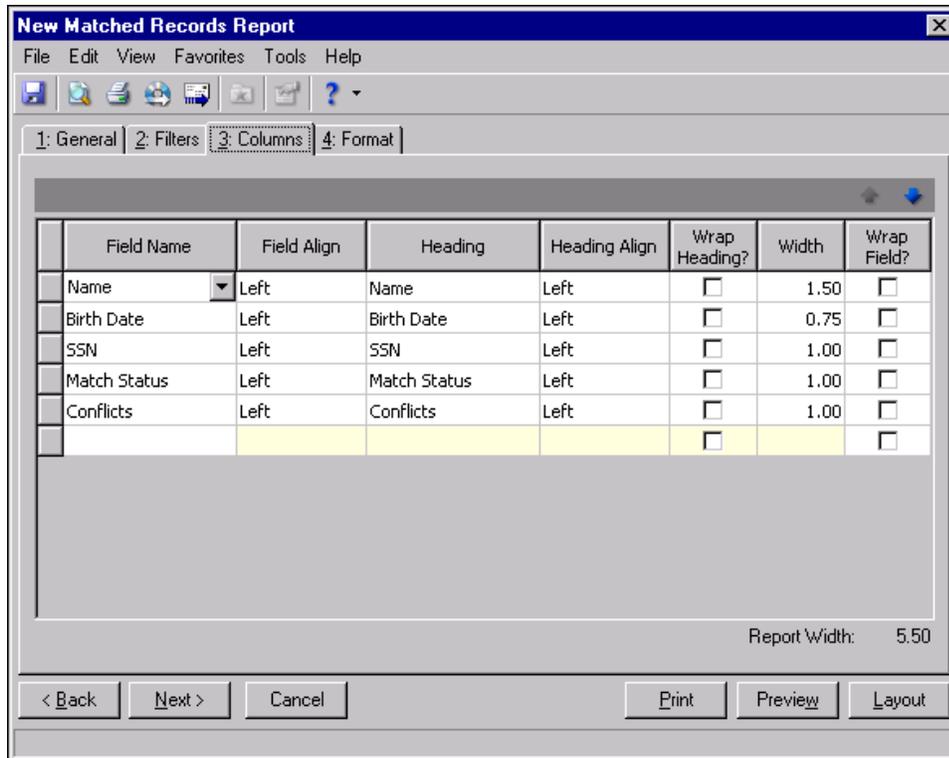
Filters. The **Filters** column lists all the filters for the report. You cannot edit this column.

Include. By default, in the **Include** column, each filter is set to All. To open a selection screen to designate specific filters for the report, choose Selected.

Selected Filters. Filters you specify on the selection screen appear in the **Selected Filters** column.

Columns Tab

On the Columns tab, you can select the columns to appear on the report, such as **Name**, **Match Status**, and **Conflicts**.



Field Name. Select the fields to appear as columns on the report.

To remove a column from the report, click the column entry and select the blank item. To add a column, click the **Field Name** column of the empty row and select the data to appear in the new column. To change the order of the columns on the report, select a row in the grid and click the up or down arrow buttons on the action bar.

Field Align. Select the alignment for the text within the column. This affects only the alignment of the data; you set the alignment for the headings in the **Heading Align** column.

Heading. You can enter a different heading for the column.

Heading Align. Select the alignment for the column heading.

Wrap Heading? Mark this checkbox to wrap heading text to the next line when it reaches the right edge of the column. If you leave this checkbox unmarked, column headers are cut off when they reach the right edge of the column.

Width. Enter the width of each column. The Report Width label, on the bottom right corner of the screen, indicates the total width of the combined columns. If this value exceeds the page width, it turns red.

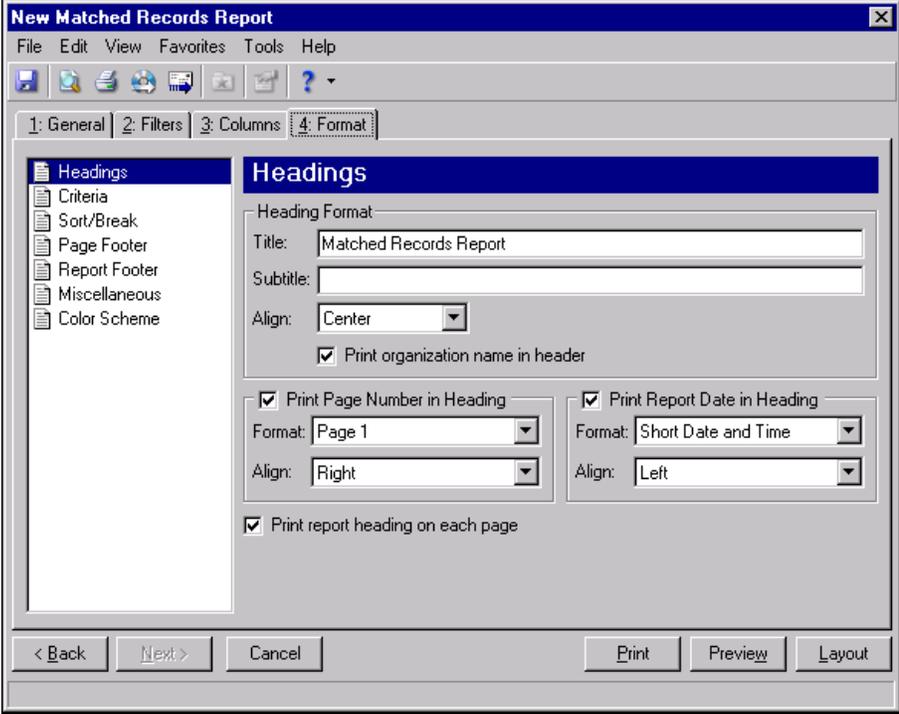
Wrap Field? Mark this checkbox to wrap field text to the next line when it reaches the right edge of the column. If you leave this checkbox unmarked, column content is cut off when it reaches the right edge of the column.

 The heading defaults to Matched Records Report in the **Title** field. You can leave this as the title for the report or enter your own.

Format Tab

On the Format tab, you select how the report will look. The list on the left of the screen displays formatting options for the report. When you select an item in the list, the right side of the screen displays selections for that section of the report.

Headings. Use **Headings** to enter a maximum of 60 characters in the **Title** and **Subtitle** fields. The title and subtitle appear at the top of the report. You can select how to align the heading and whether to include your organization's name in the header. You can include the page number and date in the heading. You can also select to include the heading on every page of the report.

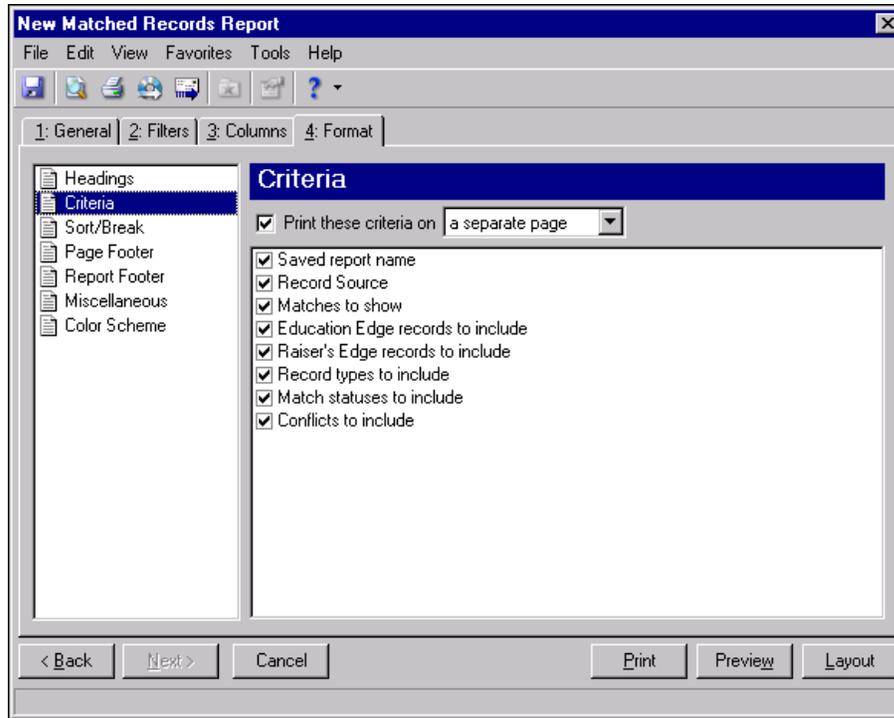


The screenshot shows the 'New Matched Records Report' dialog box with the 'Format' tab selected. The 'Headings' section is active, showing the following settings:

- Title:** Matched Records Report
- Subtitle:** (empty)
- 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

At the bottom of the dialog, there are buttons for '< Back', 'Next >', 'Cancel', 'Print', 'Preview', and 'Layout'.

Criteria. Use **Criteria** to print data to help you remember the criteria you use to create the report. Mark **Print these criteria on** and select a separate page or the first page. Your selections print in the criteria section of the report.



 The program automatically selects all criteria. Unmark the checkbox for any criteria that should not print on the report.

Sort/Break. Use **Sort/Break** to select the order for information to appear on the report and where breaks fall between sets of information.

To order the information, you can select a sorting category in the **Sort by** column and select Ascending or Descending in the **Order by** column.

To create breaks, you can mark the checkbox in the **Break?** column for a sorting category. If you mark **Break?** for a category, fields are enabled so you can specify more information about the break for the selected sorting category.

In the **Text before value** and **Text after value** fields, you can enter up to 30 characters to print directly before and after the value for the selected sorting category.

To print the number or percentage for the selected category in the footer, mark **Print count per** or **Print count as a percentage of total** for the selected sorting category. To start the selected sorting category on a new page, mark **Page break on each new**.

The screenshot shows the 'New Matched Records Report' dialog box with the 'Sort/Break' tab selected. The dialog has a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar. Below the toolbar are tabs for '1: General', '2: Filters', '3: Columns', and '4: Format'. A tree view on the left lists report components: Headings, Criteria, Sort/Break (selected), Page Footer, Report Footer, Miscellaneous, and Color Scheme.

The 'Sort/Break' tab contains a table with the following structure:

Sort by	Order by	Break?
Name	Ascending	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Below the table, there are input fields for 'Break Header for Name:' (Text before value: and Text after value:), and a section for 'Break Footer for Name:' with three checkboxes: 'Print count per Name', 'Print count as a percentage of total', and 'Page break on each new Name'. At the bottom of the dialog are buttons for '< Back', 'Next >', 'Cancel', 'Print', 'Preview', and 'Layout'.

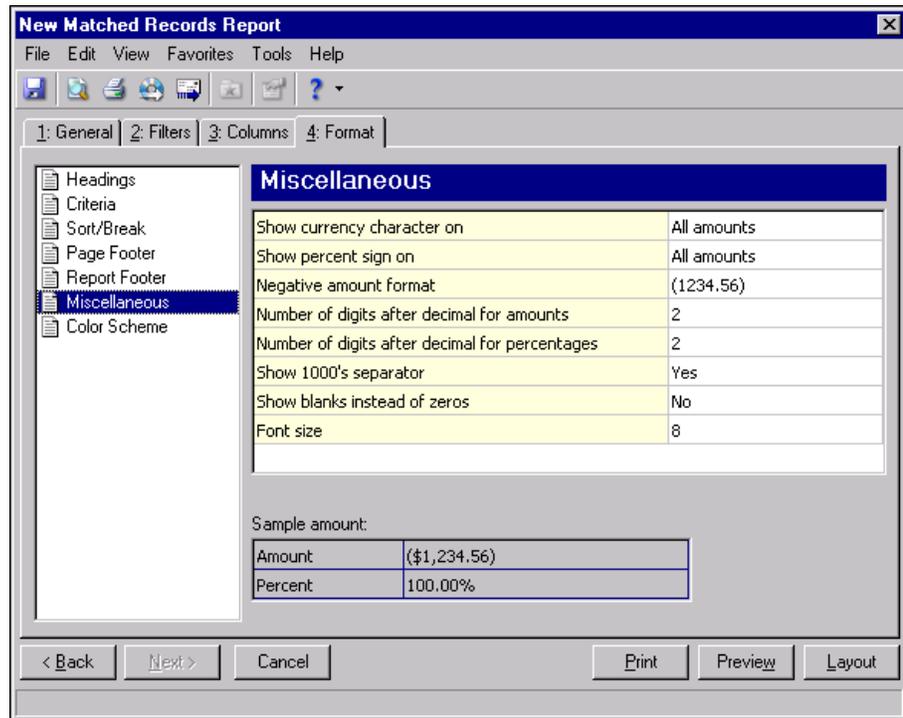
Page Footer. Use **Page Footer** to enter a maximum of 254 characters in the page footer and select how to align the text. You can include the page number and date in the footer.

The screenshot shows the 'Page Footer' dialog box within the 'New Matched Records Report' application. The application window has a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar. Below the toolbar are tabs for '1: General', '2: Filters', '3: Columns', and '4: Format'. A tree view on the left lists 'Headings', 'Criteria', 'Sort/Break', 'Page Footer' (selected), 'Report Footer', 'Miscellaneous', and 'Color Scheme'. The main area is titled 'Page Footer' and contains a 'Page Footer Text' section with a large text input field. Below this is an 'Align' dropdown menu set to 'Center'. There are two checkboxes: 'Print Page Number in Footer' and 'Print Report Date in Footer'. Under the first checkbox, there is a 'Format' dropdown set to 'Page 1' and an 'Align' dropdown set to 'Right'. Under the second checkbox, there is a 'Format' dropdown set to 'Short Date and Time' and an 'Align' dropdown set to 'Left'. At the bottom of the dialog are buttons for '< Back', 'Next >', 'Cancel', 'Print', 'Preview', and 'Layout'.

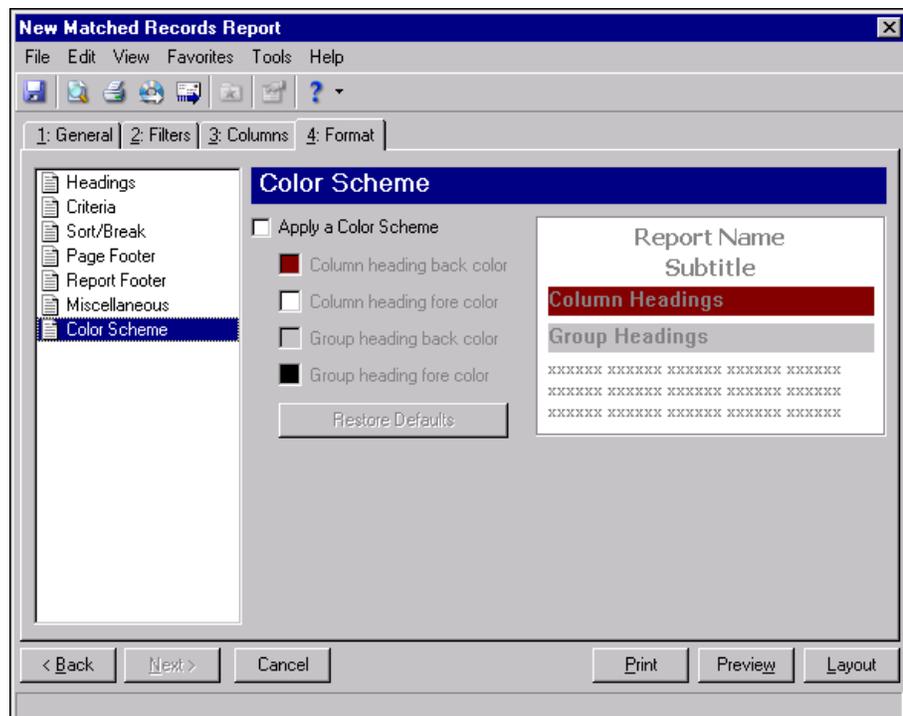
Report Footer. Use **Report Footer** to enter a maximum of 254 characters in the report footer and select how to align the text. The report footer appears at the end of the report.

The screenshot shows the 'Report Footer' dialog box within the 'New Matched Records Report' application. The application window has a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar. Below the toolbar are tabs for '1: General', '2: Filters', '3: Columns', and '4: Format'. A tree view on the left lists 'Headings', 'Criteria', 'Sort/Break', 'Page Footer', 'Report Footer' (selected), 'Miscellaneous', and 'Color Scheme'. The main area is titled 'Report Footer' and contains a 'Report Footer Text' section with a large text input field. Below this is an 'Align' dropdown menu set to 'Left'. At the bottom of the dialog are buttons for '< Back', 'Next >', 'Cancel', 'Print', 'Preview', and 'Layout'.

Miscellaneous. Use **Miscellaneous** to specify how numbers appear on the report and to set the font size.

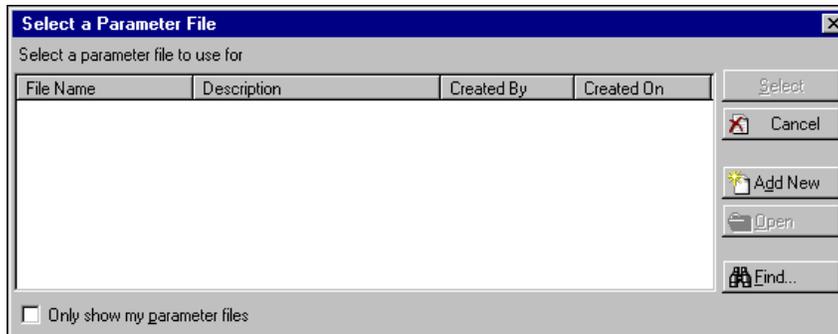


Color Scheme. Use **Color Scheme** to select colors for report headings. When you click the color box next to the selection, the Color screen appears so you can select a standard color or define a custom color. If you leave **Apply a Color Scheme** unmarked, the reports prints in black and gray.

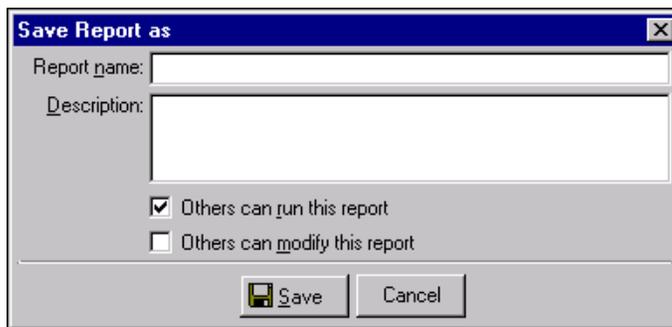


➤ Printing the Matched Records Report

1. From the Integration page, click **Print Matched Records Report**. The Select a Parameter File screen appears.



2. To use an existing report, select the report and click **Open**.
To create a new report, click **Add New**.
3. Make your selections on the report.
4. To save the report, click **Save**. The Save Report as screen appears.



5. Enter a name and description for the report.
6. To preview the report, click **Preview**.
7. To print the report, click **Print**.

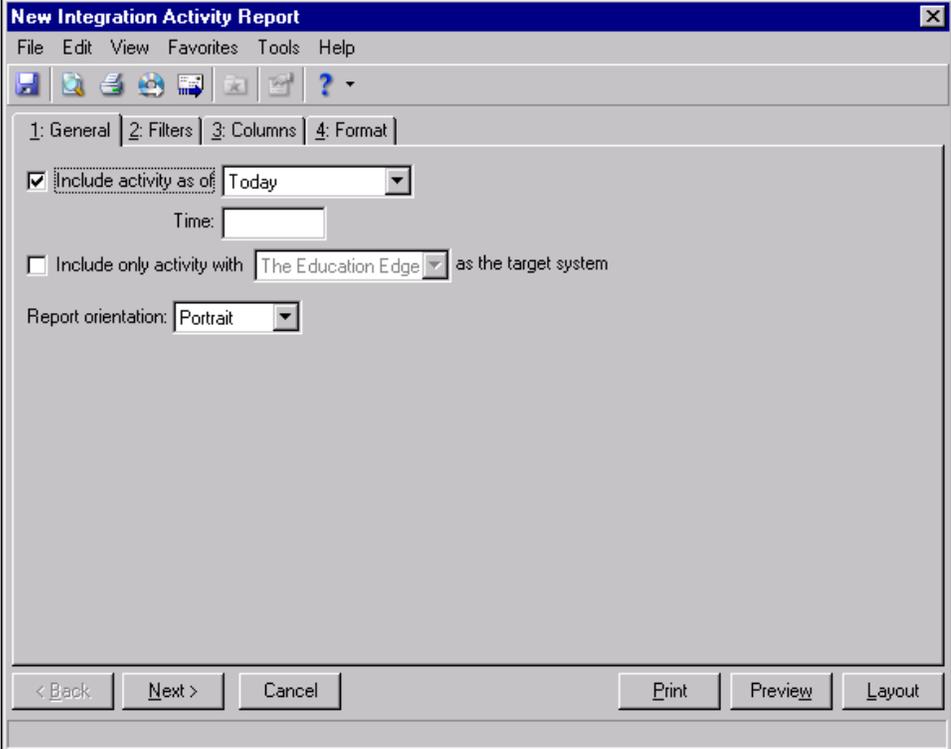
Printing the Integration Activity Report

The Integration Activity Report lists activities performed and logged on the Link Records screen and by the Synchronize Data utility. The information in the report includes records that have been added or deleted, exceptions, and data conflicts with integration.

 Other tools for tracking integration changes include viewing the History of Changes tab on a record and creating a query including record properties.

General Tab

On the General tab, you set parameters for the activity included in the report and set the report's orientation.



The screenshot shows a dialog box titled "New Integration Activity Report" with a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar. Below the toolbar are four tabs: "1: General", "2: Filters", "3: Columns", and "4: Format". The "General" tab is active. It contains the following controls:

- A checked checkbox labeled "Include activity as of" followed by a dropdown menu set to "Today".
- A "Time:" text box below the dropdown.
- An unchecked checkbox labeled "Include only activity with" followed by a dropdown menu set to "The Education Edge" and the text "as the target system".
- A "Report orientation:" label followed by a dropdown menu set to "Portrait".

At the bottom of the dialog are five buttons: "< Back", "Next >", "Cancel", "Print", and "Preview".

Include activity as of. To include activity as of a specific date and time, mark this checkbox and select "Today", "Yesterday", or "<Specific Date>". If you select "<Specific Date>", a field appears so you can enter the date.

In the **Time** field, enter a time.

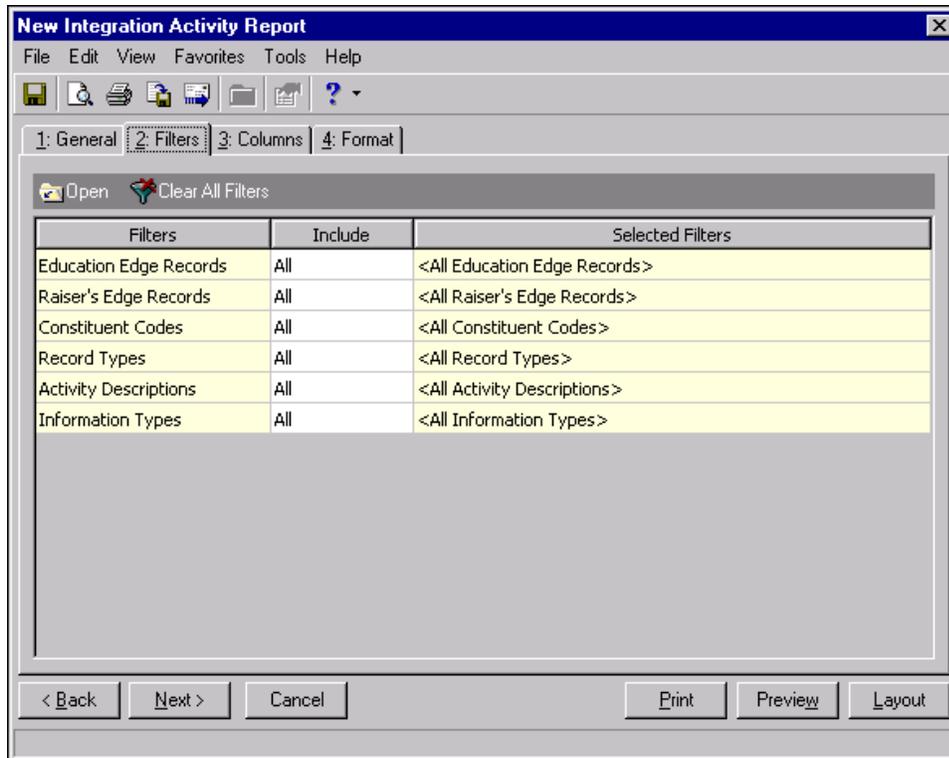
Include only activity with [] as the target system. To include activity from only one target database, mark this checkbox and select "The Education Edge" or "The Raiser's Edge".

Report orientation. In this field, select "Portrait" or "Landscape".

 Click **Preview** at any time to view the report as it will print using your selections and filters. Click **Layout** to view a sample layout of the report without data.

Filters Tab

On the Filters tab, you can filter the records appearing in the report.



Open. Select a filter in the grid and click **Open** on the action bar to access the selection screen where you can select specific filters for the report.

Clear All Filters. Click **Clear All Filters** on the action bar to remove all previously selected filters from the report.

Filters. The **Filters** column lists all the filters for the report. You cannot edit this column.

Include. By default, in the **Include** column, each filter is set to All. To open a selection screen to designate specific filters for the report, choose Selected.

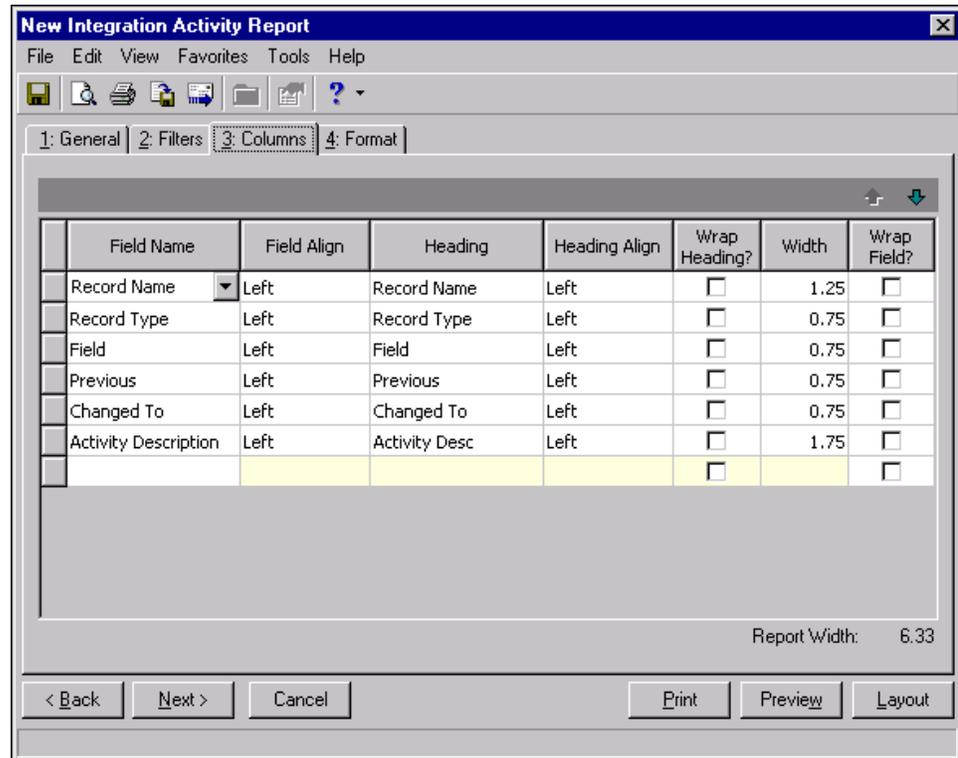
Selected Filters. Filters you specify on the selection screen appear in the **Selected Filters** column.

 You can also double-click a filter in the grid to open the selection screen.

 A filter is a requirement records must meet to be included in a report. For example, if you apply the Constituent Codes filter, only records with the constituent codes you select appear in the report.

Columns Tab

On the Columns tab, you can select the columns to appear on the report, such as **Record Name**, **Record Type**, **Field**, **Previous**, **Changed To**, and **Activity Description**.



Field Name. Select the fields to appear as columns on the report.

To remove a column from the report, click the column entry and select the blank item. To add a column, click the **Field Name** column of the empty row and select the data to appear in the new column. To change the order of the columns on the report, select a row in the grid and click the up or down arrow buttons on the action bar.

Field Align. Select the alignment for the text within the column. This affects only the alignment of the data; you set the alignment for the headings in the **Heading Align** column.

Heading. You can enter a different heading for the column.

Heading Align. Select the alignment for the column heading.

Wrap Heading? Mark this checkbox to wrap heading text to the next line when it reaches the right edge of the column. If you leave this checkbox unmarked, column headers are cut off when they reach the right edge of the column.

Width. Enter the width of each column. The Report Width label, on the bottom right corner of the screen, indicates the total width of the combined columns. If this value exceeds the page width, it turns red.

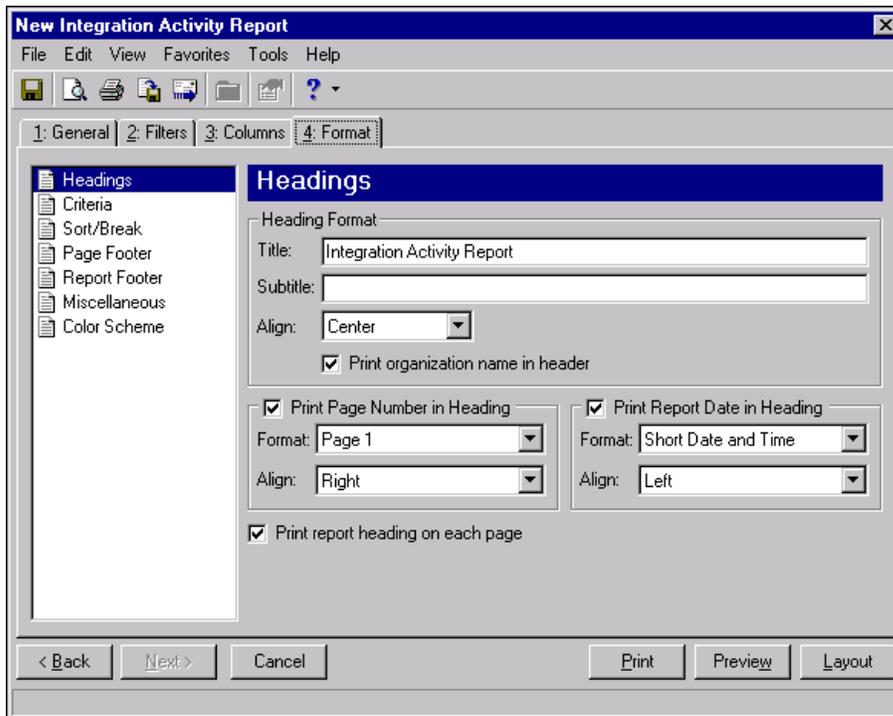
Wrap Field? Mark this checkbox to wrap field text to the next line when it reaches the right edge of the column. If you leave this checkbox unmarked, column content is cut off when it reaches the right edge of the column.

Format Tab

On the Format tab, you select how the report will look. The list on the left of the screen displays formatting options for the report. When you select an item in the list, the right side of the screen displays selections for that section of the report.

Headings. Use **Headings** to enter a maximum of 60 characters in the **Title** and **Subtitle** fields. The title and subtitle appear at the top of the report. You can select how to align the heading and whether to include your organization's name in the header. You can include the page number and date in the heading. You can also select to include the heading on every page of the report.

 The heading defaults to Integration Activity Report in the **Title** field. You can leave this as the title for the report or enter your own.



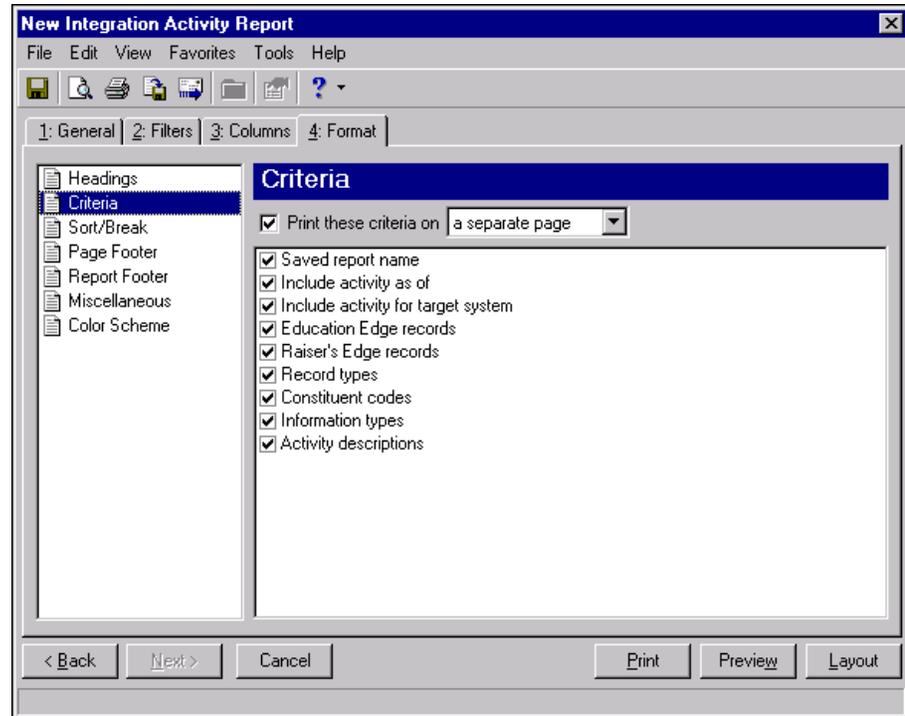
The screenshot shows the 'New Integration Activity Report' dialog box with the 'Format' tab selected. The 'Headings' section is active, displaying the following options:

- Title:** Integration Activity Report
- Subtitle:** (empty field)
- 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

Navigation buttons at the bottom include: < Back, Next >, Cancel, Print, Preview, and Layout.

 The program automatically selects all criteria. Unmark the checkbox for any criteria that should not print on the report.

Criteria. Use **Criteria** to print data to help you remember the criteria you use to create the report. Mark **Print these criteria on** and select a separate page or the first page. Your selections print in the criteria section of the report.



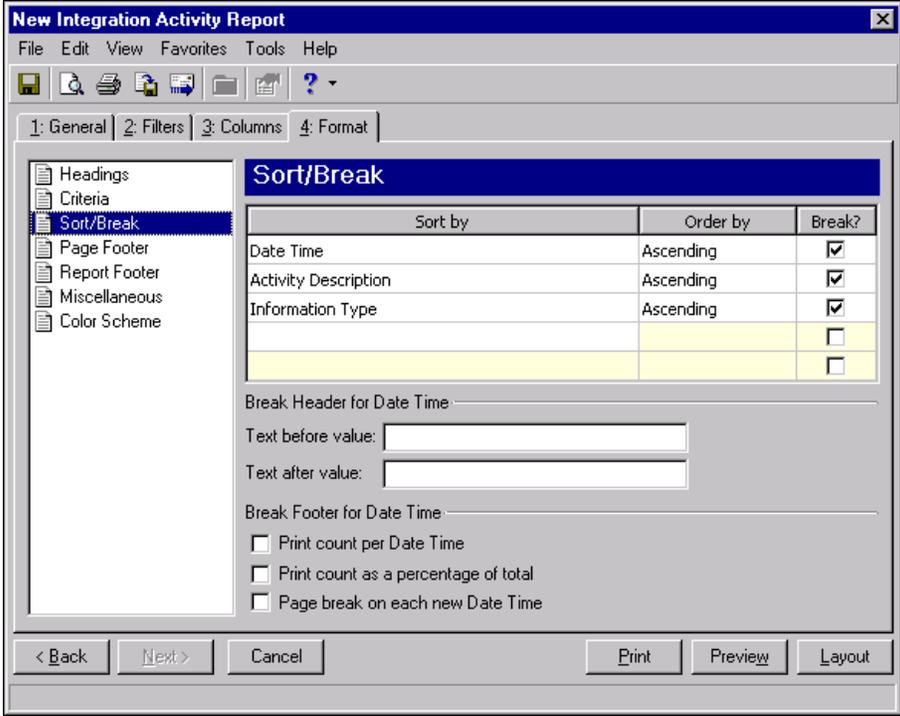
Sort/Break. Use **Sort/Break** to select the order for information to appear on the report and where breaks fall between sets of information.

To order the information, you can select a sorting category in the **Sort by** column and select Ascending or Descending in the **Order by** column.

To create breaks, you can mark the checkbox in the **Break?** column for a sorting category. If you mark **Break?** for a category, fields are enabled so you can specify more information about the break for the selected sorting category.

In the **Text before value** and **Text after value** fields, you can enter up to 30 characters to print directly before and after the value for the selected sorting category.

To print the number or percentage for the selected category in the footer, mark **Print count per** or **Print count as a percentage of total** for the selected sorting category. To start the selected sorting category on a new page, mark **Page break on each new**.



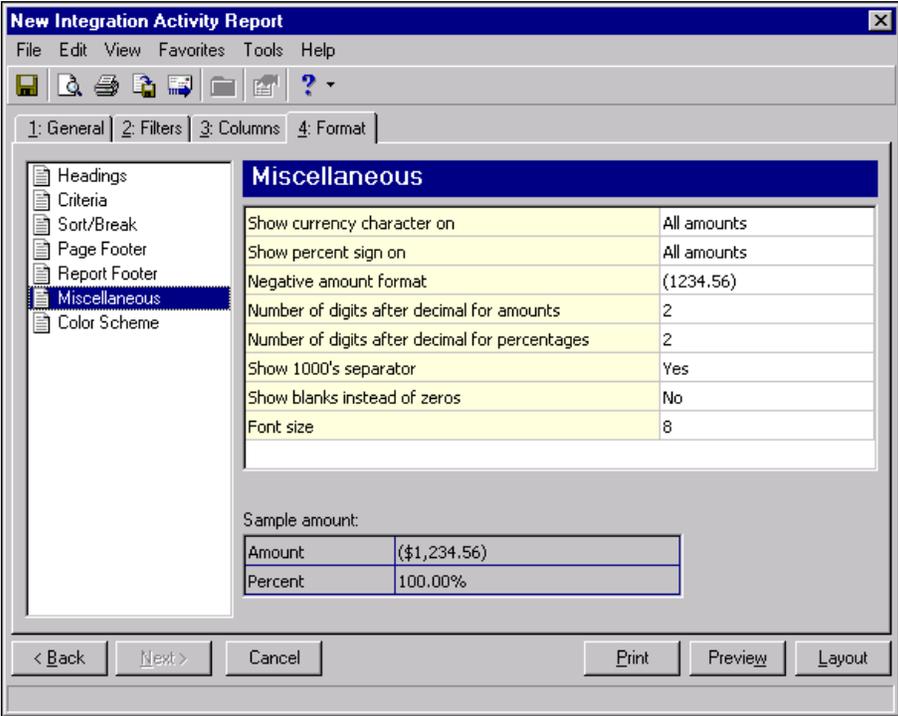
Page Footer. Use **Page Footer** to enter a maximum of 254 characters in the page footer and select how to align the text. You can include the page number and date in the footer.

The screenshot shows the 'Page Footer' configuration dialog within the 'New Integration Activity Report' application. The dialog has a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar with icons for file operations. Below the toolbar are tabs for '1: General', '2: Filters', '3: Columns', and '4: Format'. A tree view on the left lists 'Headings', 'Criteria', 'Sort/Break', 'Page Footer' (selected), 'Report Footer', 'Miscellaneous', and 'Color Scheme'. The main area is titled 'Page Footer' and contains a 'Page Footer Text' section with a text input field and an 'Align' dropdown set to 'Center'. Below this are two sections: 'Print Page Number in Footer' with a checkbox, a 'Format' dropdown set to 'Page 1', and an 'Align' dropdown set to 'Right'; and 'Print Report Date in Footer' with a checkbox, a 'Format' dropdown set to 'Short Date and Time', and an 'Align' dropdown set to 'Left'. At the bottom are buttons for '< Back', 'Next >', 'Cancel', 'Print', 'Preview', and 'Layout'.

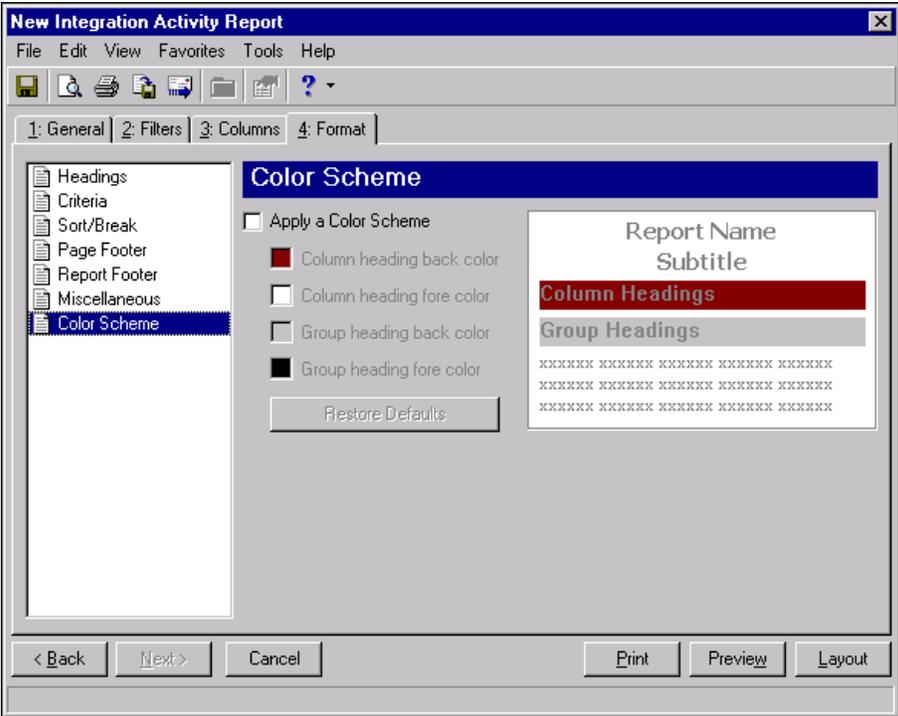
Report Footer. Use **Report Footer** to enter a maximum of 254 characters in the report footer and select how to align the text. The report footer appears at the end of the report.

The screenshot shows the 'Report Footer' configuration dialog within the 'New Integration Activity Report' application. The dialog has the same menu bar and toolbar as the previous screenshot. The tabs are '1: General', '2: Filters', '3: Columns', and '4: Format'. The tree view on the left lists 'Headings', 'Criteria', 'Sort/Break', 'Page Footer', 'Report Footer' (selected), 'Miscellaneous', and 'Color Scheme'. The main area is titled 'Report Footer' and contains a 'Report Footer Text' section with a text input field and an 'Align' dropdown set to 'Left'. At the bottom are buttons for '< Back', 'Next >', 'Cancel', 'Print', 'Preview', and 'Layout'.

Miscellaneous. Use **Miscellaneous** to specify how numbers appear on the report and to set the font size.



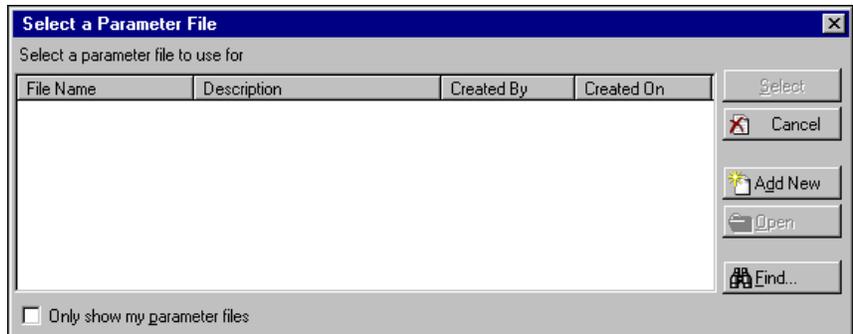
Color Scheme. Use **Color Scheme** to select colors for report headings. When you click the color box next to the selection, the Color screen appears so you can select a standard color or define a custom color. If you leave **Apply a Color Scheme** unmarked, the reports prints in black and gray.



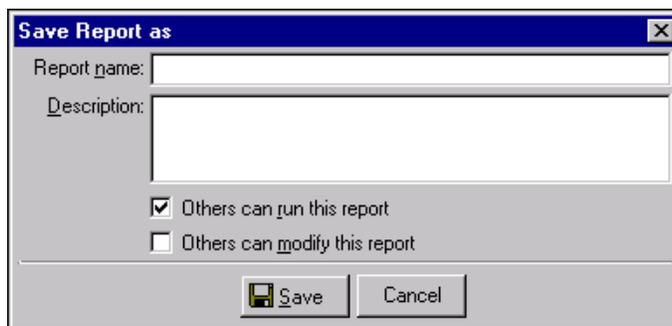
 You can also access the Integration Activity Report from the **Linking** menu on the Link Records screen.

➤ **Printing the Integration Activity Report**

1. From the Integration page, click **Print Integration Activity Report**. The Select a Parameter File screen appears.



2. To use an existing report, select the report and click **Open**.
To create a new report, click **Add New**.
3. Make your selections on the report.
4. To save the report, click **Save**. The Save Report as screen appears.



5. Enter a name and description for the report.
6. To preview the report, click **Preview**.
7. To print the report, click **Print**.

Integration Features on Records

After you have integrated *The Raiser's Edge* and *The Education Edge*, you may notice certain new features on records.

- When a record is linked to another record, the other program's icon appears in the lower right corner of the record screen indicating the record is linked to a record in the other database.
- An Addresses tab appears on a *Raiser's Edge* individual relationship record, when the record is linked to a record with multiple addresses in *The Education Edge*.

Post-Integration Checklist

After integrating, you may want to check that certain areas in the programs are working as expected and consider future policies.

- Select and review random address records in both *The Raiser's Edge* and *The Education Edge* to check for blank or duplicate addresses or incorrect address sharing.
- Check relationship records and links in *The Raiser's Edge*. For example, select a family and make sure all relationships are linked correctly.
- Select and review random records in *The Raiser's Edge* to check that constituent codes are appearing correctly.
- Check spouse records in *The Raiser's Edge*. Manual editing may be required in some cases. For example, if you are an all-female school, you may want the primary constituent to be the mother if she is an alumna. But if she is not an alumna, you may prefer the father to be the primary constituent.
- Check matching gift company records in *The Raiser's Edge*. Separate records may exist for the same business, one for corporate headquarters and one matching gift company administrative record. You need to link to the matching gift company record for integration purposes.
- Create a policy for managing address links for graduates and alumni. For example, you may want to break the address links between students and parents after students graduate.
- If you have mapped primary business fields, set a policy for marking business relationships as primary in *The Education Edge* so this information can be moved to *The Raiser's Edge*.

Updating Integrated Workstations

If you are logged into *The Education Edge* on a workstation that also has *The Raiser's Edge* installed and integration unlocked, be aware that the programs communicate in the background even if you do not have a user name and password for *The Raiser's Edge*. If *The Raiser's Edge* is updated, you may receive a message when working in *The Education Edge* to run database revisions and update *The Raiser's Edge* client components. If asked to do so, click **Yes**.

If you are logged into *The Raiser's Edge* on a workstation that also has *The Education Edge* installed and integration unlocked, be aware that the programs communicate in the background even if you do not have a user name and password for *The Education Edge*. If *The Education Edge* is updated, you may receive a message when working in *The Raiser's Edge* to run database revisions and update *The Education Edge* client components. If asked to do so, click **Yes**.



Index

A

- addresses, matching 27
- applicant relationship, mapping 17
- applicant, mapping 16
- application/enrollment fields, mapping to primary education 13

C

- checklist, printing the integration planning 9

D

- data sources, selecting 12
- data synchronizing
 - manually 43
 - overview 42
 - using the Microsoft Scheduled Task Wizard 43
- databases, selecting for integration 11

F

- faculty/staff, mapping 22
- field mapping
 - application/enrollment to primary education 13
 - people 13
 - planning 12
 - primary business 14

I

- integrated workstations, updating 70
- integration
 - accessing 8
 - features on records 69
 - planning checklist, printing 9
 - process overview 10
 - security 3
 - selecting databases 11
 - setting options 23
 - setting up 11
 - terminology 3
- integration activity report
 - columns tab 63
 - filters tab 62
 - format tab 64
 - general tab 61

- printing 60

L

- link records screen, parts 30
- linking records 29, 36, 39

M

- manually synchronizing data 43
- mapping
 - applicant relationships 17
 - applicants 16
 - faculty/staff 22
 - fields
 - application/enrollment to primary education 13
 - people 13
 - planning 12
 - primary business 14
 - record types 15
 - student relationships 20
 - students 19
- matched records report
 - columns tab 54
 - filters tab 53
 - format tab 55
 - general tab 52
 - printing 51
- matching
 - addresses 27
 - criteria, setting up 24
- Microsoft Scheduled Task Wizard, automatically synchronizing data 43

O

- options 23

P

- people fields, mapping 13
- primary business fields, mapping 14
- primary education fields, mapping to application/enrollment 13
- printing
 - integration activity report 60
 - integration planning checklist 9
 - matched records report 51

R

- record types, mapping 15

- records
 - integration features 69
 - linking 29, 36, 39
- relationships, mapping
 - applicant 17
 - student 20
- report
 - integration activity 60
 - matched records 51

S

- security for integration 3
- setting up
 - integration 11
 - matching criteria 24
- student relationships, mapping 20
- students, mapping 19
- synchronizing data
 - manually 43
 - overview 42
 - using the Microsoft Scheduled Task Wizard 43

T

- terminology, integration 3

U

- updating integrated workstations 70

W

- workstations, updating integrated 70

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