

## AUTOMATIC UPDATES OF MAIN RECORDS

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*Some people ask if there is a program/software system we can purchase that would enable an automatic update to our main records system (we use The Raisers Edge) when changes are made on the online directory?*

**The answer is yes.**

Bear in mind there are really two directions the data flows:

From Raiser's Edge (RE) to the NET DIRECTORIES INC (NDI) on-line Directory

From the NDI On-line Directory to RE

### **From RE to the Directory:**

Probably 85% of the schools we deal with are using RE as their main database. Many schools consider RE as the most valid source of their data, and want to keep the on-line directory up to date with it.

We have developed a process that 15 of our schools use.

There is a one-time setup fee of \$150, and it involves the school providing us an Excel spreadsheet of all their alumni (name, year, e-mail and RE constituent ID number) whether active, lost or deceased. We do a computer match on name and year (and possibly e-mail) and assign as many alumni in the directory with their ID number as possible (we usually get 90-95% success.) We provide the school with an audit report of the remaining 5-10% and the school has to do some detective work and manually assign them their ID numbers.

Once this is done, we can receive spreadsheets containing all your address and phone number info on any frequency you wish (every six months seems to work well) and we'll use that to update the on-line directory and provide you an audit report of changes made. This costs \$150/run (\$75/run if is just e-mail with no address or phone number info.)

This works well, and removes the need to maintain any info within the on-line directory manually.

### **From the NDI Directory to RE:**

This is much more difficult as we have no control over RE and how the client has formatted the data within it.

We do have an optional module that can eliminate the keying of updates generated from your Alumni Directory that need to be entered into RE. However, it is moderately expensive, and while we have tested it internally and are satisfied with the results, we have not had a client purchase it yet, so it has had no "live" use.

Our costs from are: \$1500 one time set up fee, plus \$165/month

In addition, the client will have to purchase the "Application Programming Interface" (API) from Blackbaud for the RE system. The client would have to deal directly with Blackbaud for a quote. (Quotes have been reported anywhere from \$8,000 to \$15,000, plus annual maintenance fees.)

Once in place, our module gives the client custom software that runs on a single PC at their end. On a daily basis, the client brings up records that have been updated within the on-line directory, and a split screen allows you to compare the data in the directory to that in RE. By clicking checkboxes the client decides what gets moved to RE (overwriting what is there already) or what gets ignored (i.e. if there are blanks in the directory, you don't want them erasing addresses in RE.) This saves the keyboarding and makes the updates much more accurate and saves time, but maintains human control over what is uploaded, ensuring the quality.

So, depending on the schools requirements, there are various options. If you want more details, or wish to discuss further, feel free to contact us.

For a demonstration or further information please contact Dale Carter at:

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