

Convio DataSync

Frequently Asked Questions (FAQ)

CONTENTS

WHAT IS DATASYNC?	3
WHAT DATABASES CAN CONVIO SYNCHRONIZE WITH?	3
WHAT IS THE CONVIO DATASYNC CONNECTOR FOR BLACKBAUD’S THE RAISER’S EDGE?	4
HOW DOES DATASYNC EXCHANGE INFORMATION WITH MY DONOR DATABASE?	4
WHAT IS REQUIRED OF MY DONOR DATABASE IN ORDER TO WORK WITH DATASYNC?	4
CAN I SYNCHRONIZE MORE THAN ONE DATABASE WITH CONVIO?	5
HOW DO I UPLOAD MY DATA FILES TO CONVIO?	5
HOW DO I DOWNLOAD DATA FILES FROM CONVIO?	5
WHAT FILE FORMATS DOES DATASYNC SUPPORT?	5
CAN DATASYNC BE AUTOMATED?	6
WHAT TYPE OF DATA CAN BE PROCESSED VIA DATASYNC?	6
CAN I UPLOAD DETAILED TRANSACTION DATA INTO CONVIO?	6
WHAT HAPPENS WHEN INFORMATION FOR THE SAME PERSON CHANGES IN BOTH DATABASES?	7
WILL CONVIO STORE MY DONOR DATABASE’S UNIQUE ID FOR EACH CONSTITUENT?	7
WHAT CAN BE DONE TO REDUCE DUPLICATES?	7
DOES ANY ADDITIONAL SOFTWARE NEED TO BE INSTALLED ON MY DONOR DATABASE TO ENABLE DATASYNC?	8
DOES ANY ADDITIONAL HARDWARE NEED TO BE INSTALLED TO ENABLE DATASYNC?	8
HOW LONG DOES IT TAKE TO RUN A DATASYNC?	8
HOW OFTEN SHOULD DATASYNC BE RUN?	9
WHAT ARE THE STEPS TO A TYPICAL DATASYNC?	9
WHAT ARE THE STEPS TO IMPLEMENTING A CUSTOM DATASYNC?	10
HOW LONG DOES IT TAKE TO GET DATASYNC IMPLEMENTED?	10
WHAT HAPPENS IF I UPGRADE MY DONOR DATABASE TO A NEW VERSION, OR SWITCH TO A NEW VENDOR?	10

What is DataSync?

Convio DataSync is a utility that allows Convio applications to exchange (import and export) data with other databases. DataSync comes in two forms: standard and custom.

Standard

A standard DataSync implementation exchanges data for a subset of database fields in a pre-determined file format that is defined by Convio. All Convio Web sites come with standard DataSync operations for uploading constituent, segmentation, event, and Convio TeamRaiser™ data, and for downloading constituent and transaction data.

Standard DataSync exchanges files in a Convio-defined format. Consequently, any integration with an offline database typically will require you to manually reformat the files. Files uploaded to Convio must be altered to match the standard Convio import structure, and files downloaded from Convio need to be altered to match the import requirements of your donor database (or they could be manually entered). Furthermore, the exact data that can be exchanged is limited to fields supported by these standard operations. The business rules for processing data is fixed and defined by these standard operations.

Custom

A custom DataSync is a structured process for exchanging data that is tailored to your donor database and data exchange needs. This means that we work with you (see *What are the steps to implementing a custom DataSync?*) to identify the exact information you want to upload to and download from Convio, and in what format. We also define the business rules unique to your organization that govern how the data is processed.

Custom DataSyncs are designed to minimize manual steps. Unlike a standard DataSync, custom DataSyncs are configured to automatically accept upload files in the format they are exported from your donor database. In addition, downloaded files from Convio are produced in a format that is tailored to your donor database; they may be imported without reformatting. The Convio side of a custom DataSync can also be automated, eliminating the need to manually upload data to or download data from Convio.

What databases can Convio synchronize with?

If you are using *The Raiser's Edge*®, you will get automated, real-time connectivity between Convio's online and *The Raiser's Edge* offline databases using DataSync Connector for BlackBaud's The Raiser's Edge. For more information, see the next question and contact your local Convio sales representative.

Convio DataSync supports any database that can:

1. Export constituent data in a CSV (comma separated value) format with a header row, *and*
2. Import constituent and gift data in CSV or fixed length format. The import utility must be able to add new constituent records, update existing constituent records, and add new gift records.

The following databases support conditions (1) and (2) without modification:

- *MPower Systems* – MPX
- *SofterWare* – DonorPerfect Visual Edition

The following databases do not have an import/export module built in. Convio clients may need to contract their vendor or a third party to configure the import and/or export for them, or the client

will need to develop their own import/export scripts. With this assistance from the vendor or the client, Convio is confident that integrations can be performed with these databases:

- Allegiance Software – Main Fundraising System
- BearingPoint
- Brickmill Marketing Services – PROSPER
- CDS
- Experian
- Herlick Data Systems – MEMSYS
- Lawson
- Merkle - MoneyMaker
- Sage Software (formerly MIP) – Millennium
- SofterWare – DonorPerfect Online
- SofTrek – PledgeMaker
- Target Software – Team Approach
- TDC/The Data Center

For all other databases, please check with Convio Technical Services.

What is the Convio DataSync Connector for BlackBaud’s The Raiser’s Edge?

In simple terms, the Connector allows The Raiser’s Edge and Convio’s Constituent360™ to exchange data in an automated way, simplifying the DataSync process and opening new real-time integration possibilities.

In technical terms, the Connector is a SOAP-based Web Services Application Program Interface, or API. This technology allows the Connector to serve as a bridge for communication between the offline database and Constituent360. By utilizing industry standard Web-based services, the Connector can communicate securely and efficiently over standard Internet connections, which means no complicated infrastructure requirements for the integration.

How does DataSync exchange information with my donor database?

Data is exchanged between Convio and your donor database via text files. Files can be transferred at any time through your Web-based Convio administrator page by running a DataSync operation. DataSync operations also can be configured to run automatically at scheduled times. For more details, see *Can DataSync be automated?*

See *What file formats does DataSync support?* for information on supported file formats.

See *How do I upload my data files to Convio?* and *How do I download data files from Convio?* for information on how the files are transferred.

What is required of my donor database in order to work with DataSync?

In order for your donor database to work with DataSync it must support the export and import of files in a particular format — see *What file formats does DataSync support?*

At a minimum, the import function should allow you to create new constituent records and update existing records. If you intend to import additional types of data, such as gift transactions, those types should be supported, as well.

Can I synchronize more than one database with Convio?

Convio defines synchronization as the two-way exchange of information between databases. Given that definition, it is not possible to synchronize more than one database with Convio.

It is possible, however, to load data from more than one data source into Convio. The key distinction is that the data is traveling one way, from your data file(s) to Convio. The data uploaded this way is typically limited to name and email address, although more can be added. The capability of Convio to upload from multiple sources depends on what type of data you wish to synchronize with your primary offline database.

Conversely, it is also possible to download the same information from Convio in different formats for import into separate offline systems (e.g., import online transactions into both an offline accounting system and an offline donor management system).

For additional details on multiple database data exchanges, please contact your Convio representative.

How do I upload my data files to Convio?

There are two options for uploading data files to your Web site.

One option is to upload your files through your Web browser via a secure administration session on your site. DataSync will provide a prompt along with a “browse” button to make it easier to select the proper file. This method is suitable for small to moderate size files (< 2MB).

Another option is to upload the file via File Transfer Protocol (FTP). DataSync can be configured to run automatically once the file is uploaded, or it can be configured for manual operation. This option supports any file size.

How do I download data files from Convio?

There are two options for downloading the data from your Web site.

One option is to download your files through your Web browser via a secure administration session on your site. When a DataSync operation finishes running, a link will be displayed that, when clicked, will initiate a file download. This method is suitable for any file size.

Another option is to download the file via File Transfer Protocol (FTP). When a DataSync operation completes, the output files will be placed in your site’s FTP directory, ready to be downloaded. For longer running or automated DataSyncs, an email notification can be sent to let you know when the output files are ready. This option supports any file size.

All download files produced by DataSync will be stored online for one year and may be downloaded at any time.

What file formats does DataSync support?

Files uploaded to Convio must be in comma separated value (CSV) format with the first row (header record) containing field names. Field names cannot contain spaces; for example, “FIRST NAME” is not valid, whereas “FIRST_NAME” is.

Files downloaded from Convio can be in either CSV or fixed length format. CSV files will have a header record, and fixed length files will not.

Can DataSync be automated?

Yes. DataSync processing can be automated within Convio. The automation takes two basic forms: automated processing of an uploaded file, and automated processing to generate a file for download.

Upload

Automated processing of an uploaded file is triggered when the file is transferred via FTP to your Convio-powered site. Once the file is transferred, the DataSync operation will run automatically. Optionally, an email notification can be generated once the DataSync operation has finished running.

Download

Automated generation of download files can be scheduled to run at a particular time on a recurring basis. Once the DataSync operation has finished running, the download file or files are available on your site's FTP server. Optionally, an email notification can be generated when the files are ready.

Note that the automation is limited to DataSync processing within Convio. Any automation of your donor database is beyond the scope of DataSync.

What type of data can be processed via DataSync?

The following information is most commonly exchanged via DataSync.

From your donor database to Convio:

- Biographical information — Name, address, phone, email, etc.
- Summarized transaction information — Most recent gift date and amount, year-to-date amount, lifetime amount, etc.
- Grouping/segmentation information — Information you use to identify segments of your constituent population. Depending on how the information is defined in your donor database, this information may be referred to as constituent codes, attributes, flags or some other term.

From Convio to your donor database:

- Biographical information — Name, address, phone, email, etc.
- Detailed transaction information — Detailed information for online transactions including donor name, address, date, amount, campaign, honor/memorial, etc.

Additional information can be exchanged depending on the Convio solutions you purchase. Please contact your Convio representative for details on availability and pricing.

Can I upload detailed transaction data into Convio?

Currently there is no support for uploading detailed transaction information into Convio. We do, however, support uploading summary transaction information, such as most recent gift date and amount, highest previous gift date and amount, year-to-date gift total, and lifetime gift total. This level of detail allows you to personalize and segment constituents based on past activity. Our experience has shown that this summary information provides sufficient information in most cases.

What happens when information for the same person changes in both databases?

We refer to this situation as a collision. A typical scenario here would be that Ms. Smith's address in your donor database changes on the same day she changes her address on her corresponding record in Convio. The challenge emerges during the next exchange of data. We must decide which changes should be given preference and overwrite the others, or if the changes should be merged. We offer three different approaches, one of which is selected as part of the implementation configuration.

1. *Changes in the donor database are given preference.* In this case the Convio record is overwritten with information from the donor database record. A collision report will be produced that shows both records side-by-side prior to any updates so you can review differences between the two.
2. *Changes in Convio are given preference.* In this case, the Convio record is not overwritten with information from donor database record. Instead, DataSync will download the Convio version of the constituent record for subsequent import into your donor database. A collision report will be produced that shows both records side-by-side prior to any updates so you may review differences between the two.
3. *Neither update is given preference.* A collision report will be produced that shows both records side-by-side so you may review the differences between the two and apply updates on a case-by-case basis.

Most of Convio's customers choose option 2. The logic is that if a constituent changes a record online, you should recognize that change.

Will Convio store my donor database's unique ID for each constituent?

Yes, and we recommend doing so. A field in the Convio database is designated to store unique identifiers. In fact, the constituent search function in Convio offers you the option of searching for a constituent based on ID.

By storing unique identifiers, we establish a link between a constituent in Convio and your donor database. This makes it easier to keep the two databases synchronized.

What can be done to reduce duplicates?

No database can completely prevent duplicates, but we have a strategy for reducing them.

Our first defense is storing your database's unique constituent ID (see *Will Convio store my donor database's unique ID for each constituent?*) for every uploaded record. This ensures that when these records are later downloaded from Convio, they can be easily matched to the originating records.

We also have identified two additional methods that have proven to be effective at reducing duplicates. One method is applied during the upload of constituent records and is keyed off of email address. Email addresses are unique and their format is consistent, making them a reliable identifier. Prior to inserting a new constituent record in Convio, DataSync will first verify that there are not existing records with the same email address. If a match is found, DataSync will update the existing record instead of inserting a new one. The result is that email addresses are unique within the Convio database. This uniqueness also can be enforced for all constituents who register online. Enforcing unique email addresses is an optional method, albeit one we highly recommend. In some cases we have configured sites to accept multiple accounts with the same email address. This often is true for sites that make extensive use of TeamRaiser. On these sites we often find that families share the same email address among multiple participants. In this case, we can either turn off email matching in the DataSync upload, or we can require that DataSync match email *and* a portion of the name prior to updating an existing constituent record.

Another method for managing duplicates uses what we call a “shadow” table, which is different from the primary constituent table in Convio. The primary constituent table should only contain records that have email addresses and is typically seeded with the records from your donor database; it contains all registered users of your Web site. The shadow table contains all constituent records from your donor database, including those that do not have an email address. The shadow table is only used when checking for duplicates. Both the shadow and constituent tables are hosted on your site. The combination of the shadow table and the primary constituent table is used to identify and resolve duplicates created by any of the following means:

- Full registration
- Quick registration
- Donation
- Convio TeamRaiser registration
- Ticket purchase

Shortly after a constituent record is created in Convio via one of the preceding methods, it is checked against existing records in the constituent and shadow tables in Convio and assigned a match score. If the match score exceeds a user-defined threshold, it is flagged as a potential duplicate for review and resolution by an administrator. The review process ensures that you have complete control over which matches are valid, thereby providing a higher level of data integrity. If the administrator determines the new record matches an existing constituent or shadow record, the new record can be associated with the existing shadow record or merged with the existing constituent record, thus preventing a duplicate.

Does any additional software need to be installed on my donor database to enable DataSync?

In most cases, no additional software needs to be installed for DataSync. Your database simply needs to offer an import/export utility to support the exchange of data with Convio (see *What type of data can be processed via DataSync?*).

For some databases, however, you may need to purchase an import/export utility from your vendor if it is an optional module for which you are not currently licensed.

If your database does not offer an import/export utility, an alternate approach will need to be developed. The specific approach will depend on your donor database and/or vendor. Please contact your Convio representative for additional details.

Does any additional hardware need to be installed to enable DataSync?

No.

How long does it take to run a DataSync?

For a typical site with fewer than 100,000 constituents, DataSync will run for two to 15 minutes. The actual time will depend on the amount of activity on your site. The run time on larger, more active sites may be longer.

How often should DataSync be run?

We have clients that run DataSync daily and some that run it monthly. The frequency depends on the level of activity on your site. By default, DataSync is run on demand so you may run it as often as you like. All you need to do is log in to Convio as an administrator and select the DataSync operation you would like to run.

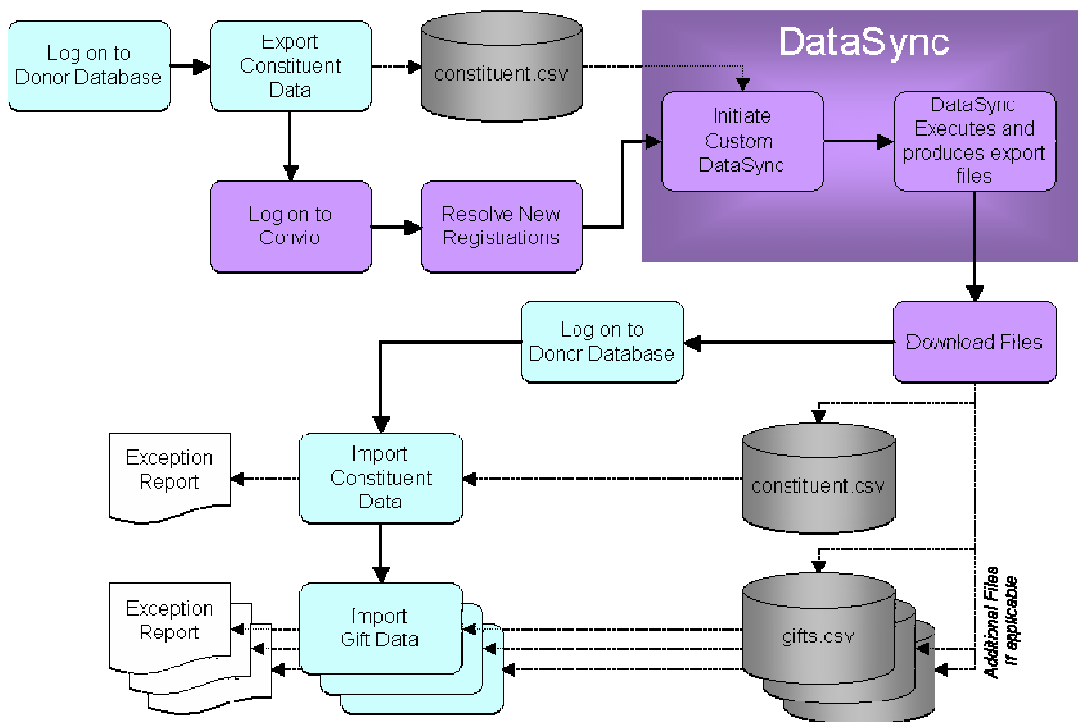
We also can configure DataSync to run on a regularly scheduled basis. Convio strongly recommends a frequency of not more often than daily for operational reasons, though more frequent intervals are possible, if required.

What are the steps to a typical DataSync?

DataSync typically includes the following steps:

1. Export data from your donor database.
2. Log in to Convio as an administrator and run DataSync. It will upload your donor database export file and produce files for download from Convio.
3. Import the files produced by Convio into your donor database.

The following diagram illustrates the flow of data between Convio and your offline database.



What are the steps to implementing a custom DataSync?

Implementing a custom DataSync is a cooperative effort between you and Convio. There are several steps to implementing a typical DataSync:

1. Complete a basic questionnaire concerning the DataSync project.
2. Discuss high level requirements and features of DataSync in an initial call with your Technical Services representative.
3. Identify the information to be exchanged between Convio and your donor database. This includes information in the donor database that should be available in Convio and information in Convio that should be in the donor database. Examples include constituent name, postal address, phone number, email address, etc.
4. Map the fields from the donor database to Convio.
5. Define the physical file layouts that will be used to transfer the information. Some of the details in this definition include field names, data format (e.g., dates in MM/DD/YYYY format) and field lengths.
6. Exchange sample files in the agreed upon file layouts and test, correcting any issues that emerge.
7. Configure final custom DataSync operations.
8. Load initial constituent data into Convio.
9. Download files from Convio to test importing of data into your offline database.
10. After site go-live, receive training on DataSync tools and complete the project.

How long does it take to get DataSync implemented?

Depending on the complexity of the information being exchanged, the amount of time ranges from six to eight weeks for a DataSync project that uses your donor database's standard import/export utilities. It is necessary to complete the constituent portion of your DataSync project prior to your site going live to ensure data integrity within your offline database; failure to do so would result in the inability to effectively use Convio's duplicate matching features, as your offline data would not be available for duplicate processing (see *What can be done to reduce duplicates?* for details).

What happens if I upgrade my donor database to a new version, or switch to a new vendor?

Upgrading to a new version of your existing donor database software may or may not impact a custom DataSync, depending on how significant the upgrade is. If the upgrade is a minor release (e.g., you are upgrading version 4.5 to 4.6), it is likely that no changes would be necessary in your custom DataSync. For a major release (e.g. 4.5 to 5.0), it is probable that DataSync would have to change. In either case, it comes down to how the new version handles the import and export of data. If the processing is the same, your custom DataSync should continue to run as originally configured. If the processing is different, your custom DataSync would have to be re-configured, incurring services fees.

Switching to a new donor database vendor will result in extensive re-configuration of a custom DataSync. Such work will be comparable to the original DataSync implementation project, with commensurate fees.

Actual changes to DataSync due to version upgrades or vendor changes will vary depending on the databases involved. If a major upgrade or vendor change is planned within one year of implementing Convio, we recommend postponing your custom DataSync until the new software is operational. In the mean time, standard DataSync operations and reports can be used to get data into and out of Convio. If you have additional questions regarding database changes, please contact your Convio representative.

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