

DRESS

Datatel Raiser's Edge Synchronization System

Wan How, IS Director
Cam Tucker, Registration IT



Why DRESS?

- Manual updates
- E-mail notifications
- Real-time updates
- Or DRESS batched synchronization



Critical Success Factors

- IT department's support
- Ownership by Datatel users
- Ownership by Raiser's Edge users
- Department champions
- Regular DRUG meetings



IT's Role

- Business Analysis
- Software Development
- Testing
- Ongoing Operations



IT Department's Perspective

- From end-users to start-users
- Listen to the users
- Let users do some of the driving
- Give feedback: let users know the no-drive zones



DRUG: Users' Ownership

- Streamlining data
 - E-mail types
 - Salutations
- Weekly Datatel-Raiser's Edge Users' Group (DRUG) meetings
 - Duplicates
 - Mailing address standardization
 - "No valid address"

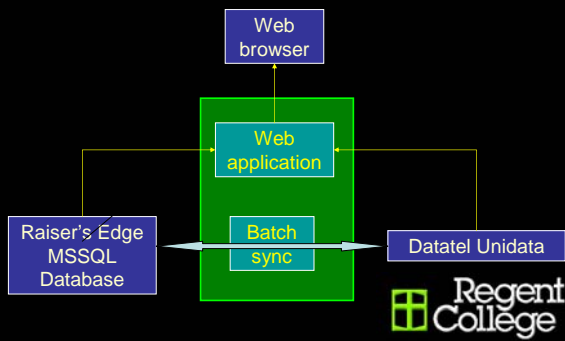


How to DRESS?

- Define sync period
- In RE, export Constituents with Constituent Date Changed within sync period
- In Datatel, export Persons with PERSON.CHANGE.DATE in sync period
- Identify and log CONFLICTS
- Prepare Import files for RE and Datatel
- Run RE Import and Datatel ELF processes (STII, ITCI)



Parts of DRESS



Try this DRESS on for size

- 11,000+ conflicts after the first sync
- Resolving the conflicts
 - Who wins? RE or DT?
 - Nobody loses!
- After database level cleaning, 2000 conflicts
- Manual cleanup (60-80 hours initially)



Demo: Web Screenshot







A Peek Under the Hood

- Apache2 webserver
- Modperl
- Persistent database connection



Benefits of DRESS

- How many records are synced for a week?
 - RE->DT: Constituents: 105 Addresses: 46
 - DT->RE: Persons: 213
- Speed: Faster than Datatel and RE
 - Addresses, phones and e-mails, etc
 - Searching for people
 - Duplicate processing
 - Bio checking
- Use DRESS for Datatel only
- Use DRESS for Datatel and any other database



What next?

- Better front end for sync
- More fields added from Datatel?
- With R18, AJAX drag and drop?
- Open source



Q & A

- Further questions? Attend the Programming Tips session, Wed@10am

Contact: Wan How
Phone: 604-221-3362
E-mail: wphow@regent-college.edu