The Raiser's Edge®
The Education Edge™
Integration Planning Guide
The Raiser’s Edge and The Education Edge Integration Planning

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With integration, you can link records between *The Education Edge* and *The Raiser’s Edge* and synchronize data on the records. Integration saves data entry time and ensures the consistency of your data.

In *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 *Integrating Student Billing with The Education Edge*. Before planning your integration with *The Raiser’s Edge*, you should have completely set up the programs you plan to use in the database you plan to integrate with *The Raiser’s Edge*.

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*.

### Integration Planning Checklist

Follow this checklist to prepare for integration. The time it takes to prepare for integration varies from school to school, but it is necessary to thoroughly complete this checklist before integrating the databases. Each step is vital to planning for a successful integration.

- Select an integration administrator with both technical and records management knowledge to lead the integration committee. For more information about this step, see “Appoint the Integration Administrator” on page 3.

- Confirm you have the correct versions of the programs and review the system recommendations on our Web site. For more information about this step, see “Confirm Version and System Requirements” on page 3.

- Form an integration committee with representatives from the admissions office, registrar’s office, business office, and development office. The integration committee is vital to planning for integration and ensuring the ongoing success of the integration. For more information about this step, see “Form Integration Committee” on page 4.

The integration committee should make the following decisions when planning for integration:

- Evaluate and resolve differences in data entry practices among the offices. For more information about this step, see “Align Data Entry Practices” on page 4.

- Decide which record types to map between the databases, for example, will students added in *The Education Edge* also be added to *The Raiser's Edge* as constituents? For more information about this step, see “Determine Record Types to Map” on page 4.

- Decide the fields to map between the databases. For more information about this step, see “Determine Fields to Map” on page 5.

- Evaluate differences in table entries used in each database and standardize the table entries for the fields you plan to map. For more information about this step, see “Standardize Table Entries” on page 6.
- Determine the default constituent codes to use for records added to *The Raiser’s Edge* from *The Education Edge*. For more information about this step, see “Determine Default Constituent Codes” on page 7.

- Remove duplicate records in each database. For more information about this step, see “Remove Duplicate Records” on page 8.

- In *The Raiser’s Edge*, you should remove duplicate relationship records that may exist from versions prior to 7.8, before nonconstituent relationships could be shared. For more information about this step, see “Merge Nonconstituent Relationships” on page 18.

- Determine which database is the most accurate, complete, and up-to-date. For more information about this step, see “Determine the Source Database” on page 21.

- To ensure both your databases are always updated with the latest record information, plan to set up synchronization immediately following the linking process. Then, schedule the synchronization process to run automatically at an interval of every 15 minutes. We also recommend you perform frequent, complete backups of your databases using a proper tape backup system. However, when you do not have such a system in place, you can run backup using the existing Blackbaud Management Console. For detailed instructions on how to back up your database, see the *Update Guide*.

- When you have completely prepared for integration, contact us to receive an unlock code to turn on the integration features in the programs. You must unlock integration in *The Education Edge* on a workstation with both *The Raiser’s Edge* and *The Education Edge* installed. For more information about this step, see “Unlock Integration” on page 22.

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**Appoint the Integration Administrator**

Select an administrator with a technical background and strong knowledge of records in *Admissions Office*, *Registrar’s Office*, *Student Billing*, and *The Raiser’s Edge*.

The administrator needs the authority to make decisions and the time to commit to the implementation process. The administrator works closely with a representative from each office as part of an integration committee.

**Confirm Version and System Requirements**

The versions required for integration are *The Raiser’s Edge 7.83* or higher, and *The Education Edge* or *The Financial Edge 7.75* or higher. Please note you must be on the latest patch before integrating the systems.

To use integration, both programs must be installed on the same workstation so they can communicate in the background, but you do not have to be logged into both. We recommend you dedicate a workstation for the integration process of automatically synchronizing data.

Visit www.blackbaud.com for the latest system recommendations.
Form Integration Committee

Assign a representative from each office (admissions, registrar’s, business, and development) to serve on the integration committee. A resource from each office is important because communication among departments is vital to prepare for and implement integration. Representatives must be familiar with data entry practices in the database they use. They must be able to attend the committee meetings and to communicate and enforce the decisions of the committee in their offices.

The committee meets to make decisions regarding implementing integration, then continues to meet weekly or biweekly after integration is set up to ensure the ongoing commitment of each department to the success of the project.

The committee is responsible for:
- Aligning data entry practices.
- Determining record types to map.
- Determining fields to map.
- Standardizing table entries.
- Determining default constituent codes.

Align Data Entry Practices

The integration committee should evaluate and resolve differences in data entry practices among the offices. Common differences include addresses, nicknames or legal names, and fields used in nonstandard ways.

Address entry. The integration committee should define conventions for entering address information. For example, the integration process may not link addresses if one office enters one-line street addresses while another office enters multiple-line street addresses, or one office designates apartment numbers with the pound sign (#) and another office identifies apartment numbers with the word Apartment or the abbreviation No.

Nickname or legal name. The integration committee should define a manner for entering first names. For example, one office enters legal names as first names and another office enters nicknames as first names. The integration process may not match these records if matching criteria includes characters of the first name.

Fields used in nonstandard ways. The integration committee should identify fields used in nonstandard ways in each database to prevent transferring irrelevant information or losing information. For example, if the registrar’s office stores student reading group information in the Nickname field, mapping the Nickname field among databases can result in records with incorrect nicknames in The Raiser’s Edge or the loss of reading group information in Registrar’s Office.

Determine Record Types to Map

The integration committee should decide how to map record types between the databases. Establish your processes for when applicants, students, their relations, and faculty/staff become constituents in The Raiser’s Edge. For example, are both parents and students added as constituents upon acceptance? Or are parents added as constituents and students as relations, and then the students become constituents upon graduation?
When configuring integration, you will specify the criteria for when records in *The Education Edge* become records in *The Raiser’s Edge*. These are the questions you will have to answer:

- Will applicants become constituents in *The Raiser’s Edge*? If so, based upon which current grades and statuses?
  
  Will applicants’ personal relationships become relationships in *The Raiser’s Edge*? If so, based upon which relationship types and applicant statuses? Do you want to include emergency contacts only? Do you want to include relations only if the applicant lives with them?

- Will applicants’ relations become constituents in *The Raiser’s Edge*? Based upon which relationship types and applicant statuses? Do you want to include emergency contacts only? Do you want to include relations only if the applicant lives with them? Do you want to add spouses of relations as constituents?

- Do you want applicants to be relations on constituent records? If so, based upon which relationship types and applicant statuses?

- Will students become constituents in *The Raiser’s Edge*? If so, based upon which current grades, statuses, and schools?
  
  Will students’ personal relationships become relationships in *The Raiser’s Edge*? If so, based upon which relationship types and student statuses? Do you want to include emergency contacts only? Do you want to include relations only if the student lives with them? Do you want to add spouses of relations as constituents?

- Will students’ relations become constituents in *The Raiser’s Edge*? If so, based upon which relationship types, student statuses, and schools? Do you want to include emergency contacts only? Do you want to include relations only if the student lives with them? Do you want to add spouses of relations as constituents?

- Do you want students to be relations on constituent records? If so, based upon which relationship types, student statuses, and schools?

- Will faculty/staff become constituents in *The Raiser’s Edge*? If so, based upon which schools, departments, and statuses? Do you want to include current teachers only?

Will faculty/staff personal relationships become relationships in *The Raiser’s Edge*? If so, based upon which relationship types?

**Determine Fields to Map**

The integration committee should determine the fields that will be synchronized, so the fields can be mapped when configuring integration.

We recommend you print and circulate the list of fields that can be mapped. For a list of the fields, see “Field Mapping” on page 22. The committee members should review the available fields with their respective offices to determine what fields are being used and how, and if there are any fields they do not want to share. The committee should reconvene to discuss which fields they want to share and whether they are using any of those fields differently.

If you make a mapped field required in one database, you should also make the field required in the other database. If you have a required field that is not mapped, you should establish a process to complete those required fields on records added through integration on a regular basis. For example, if the **Target** field is required on constituent records in *The Raiser’s Edge*, you can create a query to find the constituent records added within a date range, then update the **Target** field on these records either manually or with a global change.
It is important to decide the fields to map before linking records, especially addresses and phones.

You should be confident in the fields you map prior to linking records. 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.

### Standardize Table Entries

The integration committee should evaluate differences in table entries in each database and standardize the table entries for any lookup fields you plan to map for integration:

<table>
<thead>
<tr>
<th>Lookup Field</th>
<th>Table in The Education Edge</th>
<th>Table in The Raiser’s Edge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addresses: Address Type</td>
<td>Address Type</td>
<td>Address Types</td>
</tr>
<tr>
<td>Addresses: Country</td>
<td>Country (see International page in Configuration)</td>
<td>Country (see International page in Configuration)</td>
</tr>
<tr>
<td>Addresses: State</td>
<td>State</td>
<td>States</td>
</tr>
<tr>
<td>Phones: Contact Type</td>
<td>Phone Type</td>
<td>Phone Types</td>
</tr>
<tr>
<td>Addresses: County</td>
<td>County</td>
<td>Counties</td>
</tr>
<tr>
<td>Addresses: Region</td>
<td>Region</td>
<td>Region</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>Ethnicity</td>
<td>Ethnicities</td>
</tr>
<tr>
<td>Marital Status</td>
<td>Marital Status</td>
<td>Marital Status</td>
</tr>
<tr>
<td>Relationship</td>
<td>Relationship</td>
<td>Relationships</td>
</tr>
<tr>
<td>Religion</td>
<td>Religion</td>
<td>Religion</td>
</tr>
<tr>
<td>Suffix 1</td>
<td>Suffix</td>
<td>Suffixes</td>
</tr>
<tr>
<td>Suffix 2</td>
<td>Suffix</td>
<td>Suffixes</td>
</tr>
<tr>
<td>Title 1</td>
<td>Title</td>
<td>Titles</td>
</tr>
<tr>
<td>Title 2</td>
<td>Title</td>
<td>Titles</td>
</tr>
<tr>
<td>Status (On applications/enrollments in The Education Edge and primary education in The Raiser’s Edge)</td>
<td>Student/Applicant Status</td>
<td>Education Status</td>
</tr>
</tbody>
</table>

Table entries for mapped fields are synchronized between the databases. If table entries are different on a record, when linking a record, the entry from The Education Edge is used.
All information for each table entry should be the same in both databases. Be aware that this includes the Inactive checkbox. For the phone type tables, this also includes Do not share phone numbers of this type, Phone number type, and Phone number format. Synchronization keeps all of these synchronized with the exception of the phone number format, though we recommend you standardize the phone number format to use in both databases.

We recommend you print copies of each table’s entries and distribute the copies to the members of the committee for review. To print lists of table entries in a program, go to the Tables page in Configuration, then select File, Print, Code Tables Report. To compare table entries in one Excel worksheet, you can export the Code Table Report to an Excel format.

Decide the entries all departments will use. If you do not standardize table entries before you link records, each database will have tables with redundant entries. For example, if the Phone Types table in The Education Edge includes Beeper and the Phone Types table in The Raiser’s Edge includes Pager, select a preferred term.

To standardize table entries, you can edit the entries on the Tables page in Configuration. You can manually edit the entries or use the Table Cleanup utility to replace duplicate table entries. For more information about the Tables page, see the Configuration Guide for the program.

After you have standardized your table entries in the program, to keep entries consistent, it is extremely important that you limit rights to edit table entries. Rights to code tables are controlled in security groups in Administration. Allowing only a few key users rights to change code tables ensures the validity of your data.

Education Edge conversion affecting phone and address types. If you converted from Education Administration 6 to The Education Edge, you may have a phone or address type of “Unknown” that was created for blank phone or address types during conversion. To prevent the integration process from adding phone and address types with the prefix “Unknown” to your Raiser’s Edge database, confirm you have edited phone and address types assigned in The Education Edge to remove the prefix “Unknown”.

Raiser's Edge conversion affecting phone and address types. If you converted from The Raiser’s Edge 6 to The Raiser’s Edge 7, you may have a phone or address type of “RE7 Conversion”. To prevent the integration process from adding phone and address types with the prefix “RE7 Conversion” to your Education Edge database, confirm you have edited phone and address types assigned in The Raiser’s Edge 7 to remove the prefix “RE7 Conversion”.

Determine Default Constituent Codes

When setting up integration, you specify the default constituent codes to use for records added from The Education Edge to The Raiser’s Edge. The integration committee should decide on the constituent codes to use when each of these record types is added to The Raiser’s Edge:

• Applicant
• Student
• Applicant Relation (each relationship type can have a different constituent code)
• Student Relation (each relationship type can have a different constituent code)
• Faculty/Staff

For more information about constituent codes, see the Constituent Data Entry Guide for The Raiser’s Edge.

## Remove Duplicate Records

To prevent the integration process from linking records incorrectly or finding multiple matches for records, you should identify and remove duplicate records from each database.

In Admissions Office, Registrar’s Office, and Student Billing, you can click Search for duplicates in Administration to find potential duplicate applicants, students, individuals, organizations, and faculty/staff. You can also click Merge records in Administration to search for duplicate records and merge duplicate records into primary records. For information about searching for and merging duplicate records in The Education Edge, see the Administration Guide for The Education Edge.

You can also search for duplicate addresses by running the Duplicate Addresses Report. Use this report to merge any duplicate addresses in each student/individual/organization record.

In The Raiser’s Edge, you can click Duplicate Constituents in Administration to find potential duplicate constituents. You should merge each duplicate constituent record before you link records for integration purposes. For information about searching for and merging duplicate records in The Raiser’s Edge, see the Configuration & Security Guide for The Raiser’s Edge.

## Remove Duplicate Addresses

To find duplicate addresses, you should run the Duplicate Addresses Report. You can find this report in the Directories and Lists area of Reports in Admissions Office and Registrar’s Office. This report is also found in the Student/Individual/Organization area of Reports in Student Billing. Use this report to merge the duplicate addresses in each student/individual/organization record.

- **Search for duplicate addresses**

  While this procedure explains how to search for duplicate addresses in Admissions Office, you can use the same steps in Registrar’s Office and Student Billing.

  1. From the Reports page in Admissions Office, click Directories and Lists. The Directories and Lists page appears. A list related reports appear on the left.
2. In the list on the left, select **Duplicate Addresses Report**.


4. In the **Match addresses using the following criteria** box, mark checkboxes for the address fields to check for duplicates.

5. If you selected to check address lines, in **Use [ ] characters of the address lines**, enter the number of characters to check in the address lines for duplicates.

6. If you selected to check the ZIP/postcode, in the **Use [ ] characters of the ZIP/postcode**, enter the number of characters to check in the ZIP/postcode for duplicates.

7. To create an output query of duplicate records included in the processing, mark **Create an output query of records**.
8. Click **Next** or select the Filters tab.

9. To include only specific records in the report, make filtering selections. For more information about filtering, see the Program Basics chapter of the *Program Basics Guide*.
10. When you finish selecting filters, click **Next** or select the Columns tab.

![Duplicate Addresses Report](image)

11. In the grid, select and format the columns to appear in the Duplicate Addresses Report.

12. Click **Next** or select the Format tab.

13. From the list, select **Headings**. The heading defaults to “Duplicate Addresses Report” in the **Title** field. You can leave this as the title for the report or enter your own. In addition you can enter a subtitle for the report in the **Subtitle** field.

![Headings](image)
14. Click **Sort/Break**. The Sort/Break panel appears. The report is set by default to sort in ascending order on a record name. That means applicants are sorted alphabetically within the report. Mark the **Break?** box to make a new section appear on the report.

15. Click **Page Footer**. The Page Footer panel appears. Enter up to 254 characters in the **Page Footer Text** box. You can include other text, such as the page number and date. The page footer is printed at the bottom of each page of the report.
16. Click **Report Footer**. The Report Footer panel appears. Use the Report Footer to create a footer to appear at the bottom of the last page of the report. You can enter a minimum of 254 characters in the **Text** field for the report footer and select how to align the text.

17. Click **Miscellaneous**. The Miscellaneous panel appears. Use this panel to specify how numbers appear on the report and set the font size. We recommend you leave the font size set to 8, as larger font sizes can cause text to be cut off.
18. Click **Color Scheme**. The Color Scheme panel appears. Use Color Scheme to select colors for report headings. When you click in 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 the **Apply a Color Scheme** checkbox unmarked, the report prints in black and white.

![Color Scheme Panel](image)

19. Click **Name Formats**. The Name Formats panel appears. You can select the name format for records.

![Name Formats Panel](image)

- If you select Configuration in the **Select addressee/salutation from** field, the **Use** field contains name formats defined on the Addressee/Salutations page of Configuration.
• If you select “Record” in the Select addressee/salutation from field, the Use field contains the name formats “<Full name>”, “Primary addressee”, “Primary salutation”, and any defined addressee/salutation formats. These name formats are drawn from each record in the report. For example, if you select “Primary salutation”, the primary salutation defined on the Addresses/Salutations tab of an individual’s record is used in the report.

   In the If not present....section of the panel, you can select a backup name format. The backup is used if a record does not contain the data specified by the primary name format. Selecting “<Full name>” in the Use field disables the If not present...section of the panel.

20. Click Preview to preview the report on the screen. A message appears indicating the program the report. The preview screen appears so you can preview the report.

![Preview screen of the Duplicate Addresses Report]

21. You can print the report from this screen by clicking the Print button on the toolbar.

➤ Merge duplicate addresses

Once you have printed the Duplicate Addresses Report, you can open each record and merge the duplicate addresses from the Addresses tab of the individual, student, faculty/staff, and organization record. This procedure explains how to merge the duplicate addresses in an individual record in Admissions Office.

2. Click Individuals. The Individuals page appears.
3. In the **Search for an Individual by Individual name** field, enter the name of the person whose record you want to open. The individual record appears.

4. Press **ENTER** on the keyboard or click the binoculars. The individual record appears.

5. On the action bar, click **Merge Addresses...** The Merge Addresses screen appears.

6. In the **When merging addresses, check the following fields for identical values** box, mark checkboxes for the address fields to check for duplicates.
7. If you selected to check address lines, in **Use [ ] characters of the address lines**, enter the number of characters to check in the address lines for duplicates.

8. If you selected to check the ZIP/postcode, in the **Use [ ] characters of the ZIP/postcode**, enter the number of characters to check in the ZIP/postcode for duplicates.

9. Click **Next** or select the Preview tab. The Preview tab displays the duplicate addresses based on your criteria.

10. The records listed are considered primary records. To expand all of the rows for the records, click **Expand All** on the action bar. The rows under a primary record are considered the duplicate records that will be merged with the primary record.

![Merge Addresses](image)

11. Review the duplicate addresses found to determine if they look like duplicates or if you need to adjust your criteria.

12. If you do not want to merge a record, unmark the checkbox in the **Merge?** column for the record.

13. When you are ready to begin the merge, click **Merge**.
14. When the merge is complete, you return to the Addresses tab of the individual record. The merged address appears in the grid as the primary address.

15. Click Save and Close.

If you previously used Academy Manager, you should address all of the duplicate records in each database before accessing the Link Records screen for the first time. If you previously used Academy Manager, it is very important that you address all of the duplicate records in each database before accessing the Link Records screen. When you first access the Link Records screen, the program automatically generates Academy matches. If you decide to merge records within a database after accessing the Link Records screen for the first time, you may lose some of your Academy matches.

**Merge Nonconstituent Relationships**

You should remove duplicate relationship records in the Raiser’s Edge database. In Raiser’s Edge versions prior to 7.71, nonconstituent relationships could not be shared. For example, John and Jane are constituents and their daughter Sally is a nonconstituent. One Sally record would be a relationship for John and another Sally record would be a relationship for Jane. The two Sally records were independent and not shared. In version 7.81, the nonconstituent Sally record can be shared.

In Raiser’s Edge 7.83 you can run a Nonconstituent Merge Utility to merge selected nonconstituent relationship records in your database and delete the source records.
Merging nonconstituent relationship records

You must have Administrator rights set up from the Security link of Administration to run the Nonconstituent Merge Utility.


3. To search your database for duplicate nonconstituent relationship records, click **Search For Duplicates** on the action bar. The records which have duplicates appear on the left.

4. To expand each name to see detailed information about the duplicates, click the plus sign beside each name.

5. To view details about each nonconstituent relationship record, select the record. Details from the nonconstituent relationship record appear on the right. If you do not want to show the box on the right, click **Hide Details** on the action bar. Only the records appear and no details.

6. Once you view details, you may decide to use the arrows on the action bar to move records up or down in the tree view. To make a child relationship the parent relationship, select the child relationship and click **Make Parent** on the action bar. Once you click **Make Parent**, the child becomes the parent at the top of the list.

7. To remove a relationship record from the list, select the record and click **Remove** on the action bar. When you remove a parent, the first child in the list moves up to the parent node. If you search for duplicates again, the record will reappear.
8. When you are ready to merge the nonconstituent relationship records, click **Merge All** on the action bar. A message appears, asking if you are sure you want to merge the records. Once merged, there is no undo.

![Merge Confirmation Dialogue Box](image)

9. To merge the records, click **Yes**.

Information is merged as follows:

- No fields in the parent (top) record are overwritten. Only empty fields are populated from the child records. Fields are populated in order of the tree view. Information from the first child record under the parent record is used. Information is used from each record in successive order.

- Addresses are used as a whole. Address parts from child records are not used. If the parent’s entire address is empty, then the address from the first child with an address is used.

- Phone numbers are added unless a phone type already exists. The children’s duplicate phone types are ignored.

- Attributes are added unless an exact match exists or only one attribute of a particular type can be added.

- Education records are added unless an exact match exists. Any empty fields on the education record are filled in using the child records with an exact match.

- Business (organization) records are not merged unless the organization is an organization that is a constituent in your database. Only business records with matching constituent IDs are merged.

- Any locked nonconstituent relationships are written to a control report.

10. Once the records are merged, the control report appears. To close the control report, click the red “X” in the top left corner. You return the Nonconstituent Merge Utility screen.

11. On the action bar, click **Close**. You return to the Plug-Ins page.

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**Determine the Source Database**

The integration committee should discuss if there is one database that should be considered the source database, because it is the most accurate, complete, and up-to-date.
Keep in mind that when linking records, if there is a data conflict, you can select to show match details so you can resolve the conflict on an individual record basis, or automatically overwrite using data from *The Education Edge* or from *The Raiser’s Edge*. (If you select to automatically overwrite data from one database to another when linking records, and a field is blank in one database but has a value in the other, the value will always be used. When synchronizing data, the value last changed is used, regardless of database.)

If you will be automatically overwriting data conflicts using *The Education Edge* when linking records, and you use the *Raiser’s Edge* NCOA or CASS features, you should link records prior to running NCOA or CASS.

### Plan for Security

You should determine which users will have access to Integration in each program.

At this time, you may also want to reevaluate the security rights of individual users considering which records will be linked. For example, if you are linking student records to constituent records, you may not want *Raiser’s Edge* users to edit addresses for those students until they graduate. You can restrict those users from editing constituents with specific constituent codes using Security by Constituency options on their security group.

Also, because table entries for mapped fields are synchronized between the databases, you should also consider user rights to add, edit, and delete table entries.

For more information about security in *The Education Edge*, see the *Administration Guide* for *The Education Edge*. For more information about security in *The Raiser’s Edge*, see the *Configuration & Security Guide* for *The Raiser’s Edge*.

### Unlock Integration

Once you are prepared to proceed with integration, you can contact your account manager to request it. After you receive the unlock code, you can activate the integration feature. You must unlock integration in *The Education Edge* on a workstation with both *The Raiser’s Edge* and *The Education Edge* installed. The programs must be installed on the same workstation so they can communicate in the background, but you do not have to be logged into both. Once the integration feature is activated, the Integration page appears in your programs. For more information about the Integration page, see *The Raiser’s Edge and The Education Edge Integration Guide*.

### Field Mapping

This section provides the list of fields that can be mapped between *The Education Edge* and *The Raiser’s Edge*. The integration committee can use these tables when determining what fields to map.
### Fields Available for Mapping People in The Education Edge to People in The Raiser’s Edge

This table lists the fields available for mapping people records. You can make notes about how each field is used in each program and whether to map the fields.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Used in The Education Edge?</th>
<th>Used in The Raiser’s Edge?</th>
<th>Map?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addresses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Birth date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deceased?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ethnicity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
<td>Required</td>
<td></td>
</tr>
<tr>
<td>Maiden Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marital Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
<td></td>
<td></td>
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<td>Nickname</td>
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<tr>
<td>Phones (available only if Addresses is selected)</td>
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<tr>
<td>Relationship notes</td>
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<td>Religion</td>
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<tr>
<td>Title 2</td>
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</tbody>
</table>
Fields Available for Mapping Applications/Enrollments in The Education Edge to Primary Education in The Raiser’s Edge

This table lists the fields available for mapping application and enrollment records to primary education records. You can make notes about how each field is used in each program and whether to map the fields.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Used in The Education Edge?</th>
<th>Used in The Raiser’s Edge?</th>
<th>Map?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class of</td>
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<td></td>
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<tr>
<td>Entered/Enroll date</td>
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<tr>
<td>Date graduated</td>
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<td>Date left</td>
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</tr>
<tr>
<td>Status</td>
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</table>

Fields Available for Mapping Primary Business in The Education Edge to Primary Business in The Raiser’s Edge

This table lists the fields available for mapping primary business records. You can make notes about how each field is used in each program and whether to map the fields.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Used in The Education Edge?</th>
<th>Used in The Raiser’s Edge?</th>
<th>Map?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addresses</td>
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<td>Contact?</td>
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<tr>
<td>Organization name</td>
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<td>Required</td>
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<tr>
<td>Phones (available only if Addresses is selected)</td>
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<td>Position</td>
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<tr>
<td>Relationship notes</td>
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</tbody>
</table>
A
administrator, appointing 3

C
checklist, integration planning 2
committee, forming the integration 4
constituent code, choosing defaults 7

D
data entry practices 4
database, choosing the source 21
default constituent code 7
duplicates, removing 8

F
field mapping 5, 22
forming the integration committee 4

I
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aligning data entry practices 4
committee, forming 4
confirming version and system requirements 3
determining
default constituent codes 7
fields to map 5
source database 21
determining record types to map 4
merging nonconstituent relationships 18
planning checklist 2
removing duplicate records 8
standardizing table entries 6
unlocking 22

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choosing record types to map 4
field 5, 22
merging nonconstituent relationships 18

N
nonconstituent relationships, merging 18

P
planning checklist 2

R
records, removing duplicates 8
relationships, merging nonconstituent 18
removing duplicate records 8
requirements, confirming 3

S
security planning 22
source database, choosing 21
standardizing table entries 6
system requirements, confirming 3

T
table entries, standardizing 6

U
unlocking integration 22

V
version and system requirements 3
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