

IMODULES

Data Synchronization Options with iModules

A brief outline of available tools and
products to help you better manage
your constituent data

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Manual Import and Export

The Encompass data tools allow you to manually import and export constituent data to and from your community database, giving you access to up-to-date data and allowing you to manage your online and offline affinity efforts more effectively.

Manual Import Tool - Uploaded files (.csv file format, 20 MB file size limit) are picked up for processing 35 minutes after each hour. The import tool can be utilized in three different ways:

- You may attend our Import Tool Training in order to process your own updates
- iModules Data Team will process up to four of your data imports per year
- iModules Data Team will process additional data imports for a set fee

Manual Export Tool - Export files (.csv file format) at any time to access:

- Current data for selected records
- Changed fields and/or current data for records that have been updated over a specified time period

Scheduled Export via Email - Prepare exports to run automatically on your preferred schedule. At 2:00 a.m. Central on the day of the scheduled export, your data administrator(s) will receive an email containing a link to securely log into Encompass and download a prepared export (.csv file format) of:

- Changed fields and/or current data for records that have been updated over a specific time period
- Current data for selected records

SSH File Transfer Protocol (SFTP) Import and Export

Take your batch file data synchronization to the next level by using SFTP Import and Export. This timesaving process will enable you to automate the import and export of your constituent data.

SFTP Import - Files (.csv file format, 150 MB file size limit) are picked up for processing twice daily at 5:30 a.m. and 7:30 a.m. Central.

SFTP Export - File is created and placed in an iModules' SFTP folder at 2:00 a.m. Central for retrieval of:

- Changed fields and/or current data for records that have been updated over a specified time period
- Current data for selected records (.csv file format)

Web Services*

By enabling queries and updates on key member activity, Web Services for Encompass allows for increased efficiency and accuracy for maintaining your constituent data. Incremental changes are communicated safely and securely over the Internet and occur almost instantly. Clients are required to setup the middleware (.xml). Web Services for Encompass are divided into different categories:

- **GeneralQuery** - Update and retrieve biographical member data
- **ControlQuery** - Update and retrieve event and campaign data
- **TransactionsQuery** - Retrieve transactional commerce data
- **EmailCategoryQuery** - Import and export Email Category opt-out data
- **LoginQuery** - Log in a constituent by proxy
- **MemberMergeQuery** - Queue records for the nightly Member Merge process
- **ContentQuery** - Pull event listings/calendars and event content information

ImportOmatic*

Import constituent bio, giving, events, and membership data from Encompass into Blackbaud's hosted and on-premises versions of The Raiser's Edge with Omatic Software's ImportOmatic. This powerful, bidirectional tool enables you to:

- Use a central solution to integrate all external data into Raiser's Edge/NXT
- Match existing records or create new records
- Have a complete system: data file review, configurable duplicate search process; set, review, and edit import profile configuration and rules setting and field mapping
- Combine online and offline data to enable integrated, multi-channel marketing to raise more money and build stronger relationships with supporters, all while maintaining high data quality

Ellucian Connector*

Through an exclusive arrangement to integrate Encompass with Ellucian's Advance and Banner Advancement, the Connector for Encompass provides a comprehensive and efficient system for managing your constituent communication and affinity efforts. Up-to-date constituent biographical and Gift data is retrieved automatically through Web Services, allowing for a secure and reliable bidirectional exchange of information between your Encompass database and your offline database and eliminating the need for manual processing and custom development. The Ellucian Connector options include:

- Ellucian Advance Connector for Encompass
- Ellucian Banner Advancement Connector for Encompass

**Additional cost associated with these options*

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