

Data Extract Extension Pack

Overview

Cybergrants Webinar

Meet Your Trainer

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Learning Objective

To obtain a thorough understanding of the requirements and process involved with the Data Extract Extension Pack within CyberGrants. By the end of the session, you should have a clear picture of this process including your level of involvement and necessities to ensure a smooth and successful data extract.

Agenda

Extensions Overview

Overview of the Data Extract Extension

Definitions, Abbreviations & Formatting

Process & Requirements

Overview of Extensions

Extension Packs



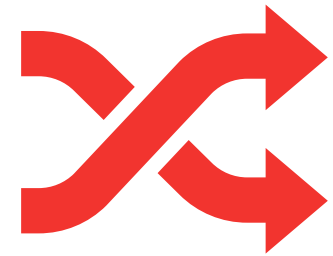
Enhancements to existing functionality



Pre-designed and templated for ease of integration



Yearly subscription fee for extension packs



Annual ability to tailor to your evolving needs

Data Extract Extension Overview

Data Extract



Definitions, Abbreviations & Formatting

Definitions & Abbreviations

Client

- YOU! The program administrator or leading collaborator working with the Bonterra team.

Proposal Type

- Web-based application or form

Delta

- The changes that will be included - based on the respective transactions change date

Employee Engagement (EE)

- Events, event sign-ups, payroll, employee gifts and company matching, requests, payments, impact reports, approvals etc.

Grants

- Requests, payments, impact reports, approvals, all other dependent data

Organization

- Grantseeker associations, optionally grantseekers and contacts

Included Fields

The Bonterra standard data extract will be performed against your program's database schema to extract and transmit a subset of the data, including:

- All standard fields
- All custom fields
- Applicable proposal types
- Custom field types included by default

ID	NAME	DESCRIPTION
2	Date	Dates in MM/DD/YY format
3	Number	Numbers up to 15 digits in length
4	Text	Text up to 100 characters in length
5	Paragraph	Paragraphs up to 2000 characters in length
6	Yes/No Value	Yes or No
8	Single-Select List	Value from a pre-defined list
9	Multi-Select List	Value from a pre-defined list
10	Percentage List	Percentages for values from a pre-defined list
12	Checkbox List	Values from a pre-defined list
14	User-Defined List	Forces line break delimited list entry
15	Credit Card	Set of fields for presenting/storing credit card information
16	Recurring Credit Card	Set of fields for presenting/storing recurring credit card information
17	Summable Number List	Set of number fields which automatically total
18	Summable Currency List	Set of currency fields which automatically total
20	Recurring Event	Set of fields for presenting/storing recurring event information
21	Metric List	Set of metric fields used primarily for post-grant reporting
23	Hour and Quarter Hour	Allows tracking of hours in quarter increments
24	Spend Detail Listing	Lists spend detail line items, provides access to spend detail entry
29	Worksheets	Tabular entry field

Included Tables

TABLE NAME	DESCRIPTION
activity_code	Organizational activity
approval	Request approval
approval_type	Request approval types as per configuration
budget	Budgets as per configuration
contact	Organizational contacts
contact_link	Table that links the contacts to the respective organizations
custom_list_value	For single-select custom fields, indicates the value selected
custom_product_value	For single-select custom fields, indicates the value selected
custom_table_value_all	Worksheet fields
donor	Donor profile
eg_batch	Employee giving gift batching records
eg_deduction_detail	Payroll pledge organizational allocations and amounts
eg_deduction_summary	Payroll pledge summary
eg_donor_profile	Additional donor profile data
eg_event	Event details

eg_nomination	Organizational nominations
eg_request	Gift records
eg_request_detail	Gift record details
gs_user_id	Grantseeker records
impact_report	Request impact report data
org_status	Organizational statuses
organization	Organizational data
organization_type	Organization type for each organization record sent
payee	Payee records
payment	Payment records
payment_audit	Payment audit
product	Product as per configuration
request	Request records
request_metric	Request metric custom field data

Process & Requirements

Data Extract



File Transmission

Data Extract



- The first data extract will include a full data set
- Ongoing data extracts will be a delta file

List Value Table

- Sent with all files
- Used to link Custom Field IDs to actual values for multi-select, percentage and checkbox fields

Tables

- Standard table fields first, followed by custom fields sorted by field type

Standard Table

Example

CG TABLE	ORGANIZATION	REQUEST	IMPACT_REPORT	PAYMENT	APPROVAL	EG_EVENT	EG_REQUEST
JOIN	organization_id	organization_id	organization_id			organization_id	organization_id
JOIN		request_id	request_id	request_id	request_id		request_id
JOIN		gs_user_id	gs_user_id				gs_user_id
JOIN			impact_report_id		impact_report_id		
JOIN				payment_id			payment_id
JOIN							donor_id
JOIN							eg_deduction_summary_id
JOIN							eg_deduction_detail_id
JOIN						eg_event_id	eg_event_id
Notes	May record with which all transactional records relate to. This also houses the details for a specific charity.	grant request	impact/post grant request	payment record	approval step associated to request and/or impact report	Volunteer event record	matching gifts, credit card donations, credit card matches, payroll matches, event sign-ups, payroll (actual) donations by org

Functional Detail (FD) Number

- FD number assigned to a FD section within the functional report specification
- Provides details about components of the platform
- Includes a Technical Constraints section that includes info from appendices below:

Appendix A

- Defines variable inputs required for data extraction

Appendix B

- Outlines details related to data transmission

Appendix C

- Specifies details of the extract file format, structure and content

Assumptions & Dependencies - Files

- Data extracts will include **all** standard fields for respective tables
 - **Can** ignore fields that are not applicable
 - **Cannot** exclude standard fields from the extract
 - **Can** request custom fields to be included
 - **Does** include historical data that was migrated into CyberGrants
- Each data extract file:
 - Will contain a single denormalized table
 - Will include headers
 - Will be consistently named
- Certain changes and data will not be captured in delta files:
 - Merged organizations
 - Hard deletes
 - IRS, NCES and other external data

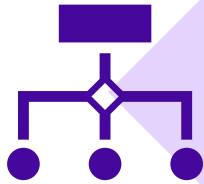
Assumptions & Dependencies - Process

- Bonterra will perform an internal QA of the data file, and will rely on your team for testing and sign off before publishing to Production
- You are responsible for importing, manipulating, querying and archiving the extracted data on the other end of the process

Your Next Steps



What do you need to address during implementation to ensure all required data is included in the extract?



Review the table formats, field types and data structures to ensure program alignment



Think through the data extract process and ongoing governance on your side

Additional Resources

- Help Center accessible from the top right hand user badge in CyberGrants

Additional Training Opportunities

- On-demand Videos available in our [Bonterra Academy](#)
- Additional webinars and training content to come!

Thank you for attending!

We hope to see you
in future trainings.