



Feature Summary: Cross Reference Process Automation

Module: Cross Platform

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IMPORTANT NOTE: THIS DOCUMENT INTENDS TO PROVIDE A COMPLETE AND ACCURATE REPRESENTATION OF WHAT CONVIO FULLY EXPECTS TO DELIVER IN FALL 2010 (AS OF SEVERAL WEEKS PRIOR TO LAUNCH) BASED ON COMPLETED SOFTWARE DEVELOPMENT. THIS DOCUMENT AIMS TO SERVE AS THE BASIS FOR PLANNING AND PREPARATION WELL IN ADVANCE OF ACCESS TO THE NEW FEATURES. GIVEN THIS DOCUMENT WAS DRAFTED PRIOR TO COMPLETED QUALITY ASSURANCE, ALL FEATURES, CAPABILITIES, SCREENSHOTS, ANSWERS, CLIENT IMPACTS, SITE DATA, PARAMETERS, AND LIMITATIONS LISTED HEREIN, WHILE REASONABLY CERTAIN FOR INCLUSION IN THE RELEASE, ARE SUBJECT TO CHANGE AT ANY POINT UP UNTIL ROLLOUT ON YOUR CONVIO SITE.

New Concepts or Terms

None

Overview

In previous COM releases, the process for creating objects and the process for configuring cross-references between objects were entirely separate. In addition, there was no way to require the configuration of cross-references before new objects could be used. In the Convio Fall 2010 release, the process by which cross-references are established has been integrated into the object creation process flow. We have also made it possible for client organizations to configure 'guardrails' for administrators who create objects -- by providing the ability to require cross-reference creation prior to making use of newly created objects.

This feature enhancement will provide the ability (when creating objects in COM) to select an object to cross-reference to in the offline database of record. Clients who make use of either Convio Common Ground (CG) or other popular 3rd party offline databases of record will have this ability. Clients who use both COM and CG will also have the ability to create CG objects to reference.

Key Features & Benefits

Features

- Integration of the cross-reference creation process flow into the object creation flow
- Ability for client administrators to create necessary objects in CG without exiting the object/cross-reference creation process flow
- Ability for client administrators to enforce requirements regarding cross-reference creation prior to using newly created objects

Benefits

- When creating new objects, client administrators no longer need to visit multiple locations within the administrative user interface; the processes for creating and cross-referencing new objects -- have been merged
- If, while creating new COM objects, client administrators recognize they also may need a new CG object to reference, they can create the new CG object without exiting the process flow for the COM object

- Client administrators can configure COM to require that cross-references be created at the same time that new objects are created, eliminating the possibility of data sync failures due to missing cross-references

Considerations for Clients

- To make use of CG object creation functionality, the COM administrator creating the new COM object must also have the necessary CG administrator credentials to create the object; COM and CG will take advantage of administrative single sign-on to share credentials between the two systems.

Feature Configuration

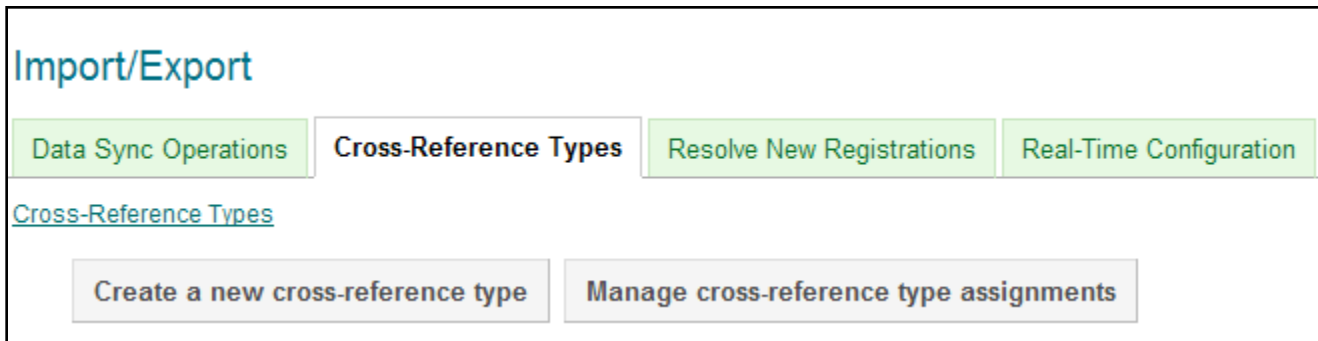
This feature enhancement will be delivered enabled, but clients will need to make cross-references accessible to administrators. That access is provided by configuring the system for several conditions:

- Whether cross-references are available to administrators
- Whether cross-references must be configured before administrators can publish events
- Who can see cross-reference assignments within their application flow
- Whether administrators can Create Common Ground Objects for cross-reference assignment

The following sections discuss each of these items.

Cross-References are Available to Administrators:

Navigate to “Import/Export” under the Administrator Data Management menu. Click the “Cross-Reference Types” tab and then click the “Manage cross-reference type assignments” button:



On the “Application Cross-Reference Assignment” page, you will find a tool for associating applications and cross-reference types.

Import/Export

[Data Sync Operations](#)
[Cross-Reference Types](#)
[Resolve New Registrations](#)
[Real-Time Configuration](#)
[Unit Management](#)
[Partition Management](#)

[Cross-Reference Types](#) > Application Cross-Reference Assignment

1. Application Cross-Reference Assignment

* Cross-Reference Type to Application Assignment Tool

Use this to associate applications and cross-reference types.

This page allows you to associate cross-reference types with applications. Click the "Add xRef Type" button to see a list of cross-reference types available and then click the Add action. Click the Delete button under Actions to remove the associated type.

Donation Classic

Cross-reference Type	Is Required	Actions
+ Add xRef Type		

Donation Campaign

Cross-reference Type	Is Required	Actions
+ Add xRef Type		

Donation Form

Cross-reference Type	Is Required	Actions
+ Add xRef Type		

You can configure Assignment types here for each of these applications:

- Donation Classic
- Donation Campaign
- Donation Form
- Ticketed Event
- Personal Fundraising Campaigns
- TeamRaiser Campaigns
- Action Alert
- Email Campaign
- Designated Gift
- eCommerce Store
- Ticket Class
- RSVP Event
- Interest
- Membership Type

To configure an assignment type for an application:

1. Click the “Add xRef Type” button under the Cross-reference Type column. A dropdown list of available types will display, along with a checkbox for indicating whether the type is to be required and the Add and Cancel buttons.

The screenshot shows the 'Donation Classic' configuration interface. It features a table with three columns: 'Cross-reference Type', 'Is Required', and 'Actions'. A dropdown menu is open under the 'Cross-reference Type' column, displaying a list of options: 'Interest Import', 'Donation Time Period Length', 'Record Type Setup', 'Transaction Fund', 'Interest Import' (highlighted), and 'Group'. To the right of the dropdown is an unchecked checkbox under the 'Is Required' column. Further right are two buttons: a green 'Add' button and a white 'Cancel' button.

2. Select the type, check the box if it is to be required, and click the Add button. Clicking the Cancel button returns the tool for that application to its default state.
3. After you click Add, the tool will display the selected type, indicate its required status, and there will be a red delete button on the far right of the page. (If you click that button, the assignment will be removed and the tool for that application returned to its default state.)

The screenshot shows the 'Donation Classic' configuration interface after the 'Interest Import' type has been added. The table now contains one row with 'Interest Import' in the 'Cross-reference Type' column, a checked checkbox in the 'Is Required' column, and a red minus sign icon in the 'Actions' column. Below the table is a button labeled '+ Add xRef Type'.

4. Repeat the above steps to configure more cross-reference types to the same or a different application.

Cross-references must be configured before administrators can publish events:

Navigate to “Import/Export” under the Administrator Data Management menu. Click the “Cross-Reference Types” tab and then click the “Manage cross-reference type assignments” button. When configuring a cross-reference type, click the “Is Required” checkbox as described above.

Administrators can see cross-reference assignments within their application flow:

Determine whom you want to see the cross-reference assignments within their application flow by adding the permissions to their administrative groups. For this purpose, a new permission has been added to the Default Permissions for Cross-Reference Management:

- Edit In-app Cross-References – allows administrators granted this permission to create and cross-reference entries only.

Choose Permission Type

What type of permissions do you want to edit? Cross-Reference Management Choose

Cross-Reference Management

These permissions control which administrators are allowed to create, edit and approve cross-reference entries.

Default Permission

The default permission on **Cross-Reference Management** for this group will be applied to all categories not being overridden below, as well as all new categories that are created in the future.

Changing this default permission will immediately affect all currently existing categories not explicitly overridden below.

Permissions displayed below are listed in order of increasing privilege, bottom to top. Any individual permission listed is a superset of the permission listed immediately below it.

Default Permission:	<input checked="" type="radio"/> Manage Cross-References Create, edit and manage cross-reference entries. Create Common Gound objects in-app if applicable
	<input type="radio"/> Edit Cross-References Create and edit cross-reference entries. Create Common Gound objects in-app if applicable
	<input type="radio"/> Edit In-app Cross-References Create and edit in-app cross-reference entries.
	<input type="radio"/> No additional permissions (inherit from Any registered user)

Note: If you configure an xRef type for an application as required, but do not grant administrators the permission to edit xRefs within the application flow, they will have to contact an authorized administrator (one who is within a group that has that permission) before they can publish a donation form, action alert, or other referenceable application. For most clients, that would be undesirable and such a configuration should be avoided.

Administrators can Create Common Ground Objects

The ability for an administrator to create Common Ground Objects depends on two conditions:

- permissions settings on Common Ground
- Single Sign On status

An administrator who is not logged in through the Single Sign On feature will be able to see, on the Configuring Cross-References page in the process flow, a button labeled “Create Common Ground Object.”

Donation Campaign Cross-Reference

* 1. Common Ground Campaign

Create Common Ground Object
Filter:

Name	Selected Value
No records found.	

On clicking that button, the administrator will be taken to the Common Ground login page.

An administrator who is logged in through the Single Sign On feature will not see the button unless permissions were set in Common Ground giving that administrator the ability to create such objects. An administrator *who has Common Ground permissions* will be able to click the button and immediately be taken to Common Ground to complete the creation steps on that interface.

Sample Screen Shot

Sample – Configuring a cross-reference in the application process flow for any of the thirteen appropriate applications is the same. At the “Configure Cross-References” step, you usually find a selection tool listing remote applications available to be cross-referenced to the one you are editing. If the list is very long, you can narrow it down by typing in the first few characters of the remote application name.

Donation Management

Online Giving | Donation Classic | Pending Contributions | Sustaining Gifts | Designated Giving | Membership Types | Donation Reports | General Configuration

Campaigns > Xref Donation Campaign

1. Identify Campaign
2. Choose Financial Options
3. Specify Groups and Notifications
4. Configure Cross-References

Use this page to configure your cross-references. Depending on the cross-reference types, you will either enter the name of your cross-reference object to associate or you will select the name from a list.

Donation Campaign Cross-Reference

*** 1. Common Ground Campaign**

Filter:

Name	Selected Value
2006 Campaign	
2007 Campaign	
2008 Campaign	
2009 Campaign	
2010 Campaign	
testXref	

2. Common Ground Designation

Filter:

Name	Selected Value
Unrestricted	

[Finish](#) [Save](#) or [Cancel](#)

Once you select the cross-reference (and other values, which vary as appropriate, by application) that name appears under the “Selected Value” column.

Donation Campaign Cross-Reference*** 1. Common Ground Campaign**Filter:

Name	Selected Value
2006 Campaign	2006 Campaign
2007 Campaign	
2008 Campaign	
2009 Campaign	
2010 Campaign	
testXref	