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VolunteerMatters
AJLI Synch Tool Guide
Version 1.1

Overview

The VolunteerMatters AJLI synch tool allows you to reconcile what AJLI has on record with what you have in your database. This is accomplished by using the roster export from AJLI's E-Update utility to compare with the existing Contact data. VolunteerMatters produces a "change" file with all of the adds, removals, and changes in a format that complies with the E-Update specification provided by AJLI.

VolunteerMatters Setup

Several ways in which you setup VolunteerMatters fields and statuses in order to take full advantage of the tool.

Statuses

Closerware used to recommend tracking League Status and AJLI status separately. This would mean that if a member went from Provisional to active you would have to record the change under the members "League Status" and again under their "AJLI Status". We now recommend, based on customer feedback, a simpler format where everything is tracked under league status. In this method, we use a simple convention for naming of those statuses within the Closerware system.

The AJLI statuses that affect synchronization are as follows:

P - Provisional
A - Active
S - Sustainer
E - Sustainer Emeritus
D - Deceased
R - Resigned
X - Dropped

These are the status we must know for the update to AJLI. We also recognize that most leagues have variations on some of these. The recommended naming convention would be to preface each League Status with the letter code for the corresponding AJLI status. For example, a league might have the following statuses:

Example League Status	Naming Convention
New Member Spring	P - New Member Spring
New Member Fall	P - New Member Fall
Active	A - Active
Active Gold	A - Active Gold
Sustainer	S - Sustainer
Sustainer Emeritus	E - Sustainer Emeritus
Transferred Out	X - Transferred Out
Terminated	X - Terminated
Resigned in Good Standing	R - Resigned in Good Standing
Resigned in Poor Standing	X - Resigned in Poor Standing
Deceased	D - Deceased

You will notice that transfers are flagged the same as terminated and resigned in poor standing. This is because AJLI's system for synchronization does not support transfers. However you still want them to be removed from your roster with AJLI so that you do not continue to pay for their membership. The following is an excerpt from their eUpdate documentation concerning transfers:

"Processing TRANSFERS
Transferring members is a League-to-League process. AJLI completes the transfer in our membership database only when we receive notice from the receiving League that the transfer has been completed. For this reason, the Electronic Member Forms system currently does not have a provision for submitting transfers. You must continue to use the transfer cards."

Contact IDs

The update utility uses the AJLI ID to uniquely identify a contact record. The Closerware utility can match contacts records in one of two ways. While most customers use the Contact ID to hold the AJLI number, others use a custom field for this purpose.

AJLI ID as Contact ID

The VolunteerMatters system requires that each record has a unique Contact ID. This means that all records in VolunteerMatters have a value. However, temporary IDs are normally assigned to potential or pending members until they have been assigned an ID from AJLI. This means, in practicality, that when reconciling it may look like AJLI has a member in their system that you don't – and you have records that AJLI does not. This will be noticeable when sorting the reconciliation data. This will be rectified once newly assigned AJLI Ids are entered into the contact records. Closerware suggests using an easily recognizable convention for temporary Ids. For example, prefacing Ids with "T-" would allow for easy identification of temporary values since this will never overlap with a valid AJLI number.

AJLI ID in Custom Field

In the case where a custom field is used to hold the AJLI number, a contact without an ID will simply be missing a value. This situation will also result in the appearance that these members do not exist in AJLIs records. Adding AJLI Ids for new members will solve this issue. The reconciliation process will make it easy to identify these records.

Synchronizing

Download roster export from AJLI

The first step in the synchronization process is to acquire the latest records in AJLI's database. This is done by downloading the roster from the AJLI E-Update tool. Once this file is downloaded, open it in Excel (or compatible program) and save a copy in a comma-delimited file (CSV). Please see your AJLI E-Update documentation or contact AJLI for support if you have questions on retrieving your Roster.

Import roster into Closerware.

The second step is to import your AJLI Roster into VolunteerMatters. This is accomplished by using the import screen found at Setup -> AJLI Synch -> Import AJLI Roster.

If asked for the "Roster Type," leave the default value of "New Complete Roster.".

Configure Synchronization

Review and modify the AJLI Synchronization Configuration found at Setup -> AJLI Synch -> Configuration.

- **Field mapping**
  Some of the AJLI Roster fields can be associated with a particular field from the contact

database. This section of configuration allows you to choose which database values are sent for the corresponding AJLI fields.

- **Deceased, Resigned, and Dropped Statuses**
  Choose which contact statuses indicate a deceased, resigned, and dropped contact, respectively. This identifies all of the records that are no longer current so we can notify AJLI to remove them from your roster if they are still appearing.

- **New Contact Statuses**
  Choose which contact statuses should be considered when searching for New Contact records. These are records that are in the Contact database, but not at AJLI. If, for example, you keep employees in your database, assign these users a unique status and exclude that status from this section. Otherwise we will recognize those records as ones that should be added to the AJLI roster.

Inspect Roster

We are ready to inspect the roster by using the menu item Setup -> AJLI Synch -> Inspect/Process Roster. On this screen you can review, filter, and sort the roster. You can also process it to detect changes, find additions, or generate an update file when ready.

The first thing you will want to do is to detect changes. This action re-evaluates the Roster data and searches for differences from the Contact database based on the Synchronization Configuration. If your Contact Data has been edited, you must re-run this process to update the detected changes. This is a long-running process and can take up to a few minutes depending on the size of the Roster.

Secondly you may want to detect additions, or new contacts. This action searches the Contact Database for records that match the Synchronization Configuration but are absent from the Roster. If Contact Data has been edited, you must re-run this process to update the detected additions.

Basically there are four kinds of things you will find:

1. Records that have changed and need to be updated in AJLI's database

2. Records found at AJLI that need to be added to your VolunteerMatters database

3. Records in VolunteerMatters that need to be added to the AJLI database.

4. Records that need to be removed from the AJLI database.

In the list view of the Roster, there is a column named "Code." In this column will be a one character code that indicates the status of the record. The following table lists the codes and their meaning.

Code	Meaning
C	The record has changed. Click on the "detail" link to see the changes highlighted in red.
D	The record is for a deceased contact. The record will be removed from the AJLI Roster.
P	The record is for a dropped contact. The record will be removed from the AJLI Roster.
R	The record is for a resigned contact. The record will be removed from the AJLI Roster.

N	The record does not appear on the AJLI Roster. This may be sent as an addition to the AJLI Roster.
?	The state of this record is unknown. Either the record is found at AJLI but not in VolunteerMatters, or the change detection process has not been run. If the notes field reads, "Member Not Found," this means the record is on the Roster but not found in VolunteerMatters. This happens when AJLI assigns an AJLI ID that is not yet entered in VolunteerMatters.

Clicking on the detail link of a roster record will show the values for AJLI and the league side-byside. From the detail screen, you can jump directly to the given Contact record if available. Please note that you can filter out certain Roster records and change the sort order. This may be very useful when reviewing changes, finding new contacts, and finding new AJLI Ids.

Records that have changed.
These are the easiest. This is where the AJLI roster contains a contact with an ID that matches a record you have in your VolunteerMatters database AND where their information has changed. There is nothing else that has to be done to check this data. Once you have reviewed these records, it might help to remove them from view to concentrate on the other records. To do this add a filter criteria "Update Code does not equal C"

Records that need to be added to your VolunteerMatters database.
These are records that AJLI has in their roster where the Contact ID does not match a record in your VolunteerMatters database. This is often times caused by a missing, transposed, or otherwise erroneous Contact ID in the VolunteerMatters database. It is helpful to sort the roster by Last Name, First name. Also, add a filter that shows only records with a code of '?' or 'N'. Look for adjacent records that show a code of 'N' next to one with "Member Not Found." If the contact names are identical, it may be that the AJLI ID is not updated (or is incorrect) in VolunteerMatters. In such a case, you can click on detail, then go directly to the contact record to update the AJLI ID. Once all such changes are made, make sure to run the "Detect Changes" process to have those removed from the list.

Records that need to be added to the AJLI database.
These are records that are in your VolunteerMatters database that have a Contact ID that does not equal any record in the AJLI roster. These should be few and far between if the previous step was completed thoroughly. The only records that should appear in the view are contacts that you have yet to submit to AJLI for a contact ID or that AJLI has yet to process. If changes are made, "Detect Additions" to refresh.

Records that need to be removed from AJLI database.
These are records in your database that are no longer current contacts (they've been terminated, resigned, etc.) that AJLI still has on record as being current. The system determines this by the settings you applied during the synchronization configuration described previously. In other words if the AJLI roster shows a contactas being active or sustaining but your VolunteerMatters database has that person as resigned, dropped, or deceased, the process will remove those contact records from AJLI's roster.

Generate E-Update File
Once the above process is finished, you can generate an AJLI E-Update file. Please note that only the "filtered" records are included in the output. If you wish to prepare a complete file, make sure to remove any filters. Be careful not to open this file in Excel, as certain auto-formatting features could possibly save the file in a format incompatible with AJLI E-Update.

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Log into E-Update and upload the change file.

The last step is to upload the change file to the AJLI E-Update utility. There is a function just for this purpose. Please see your AJLI E-Update documentation or contact AJLI for support if you have questions on uploading your changes.