Managing Data in Finalsite

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Agenda

Constituent Data

- Manual Management
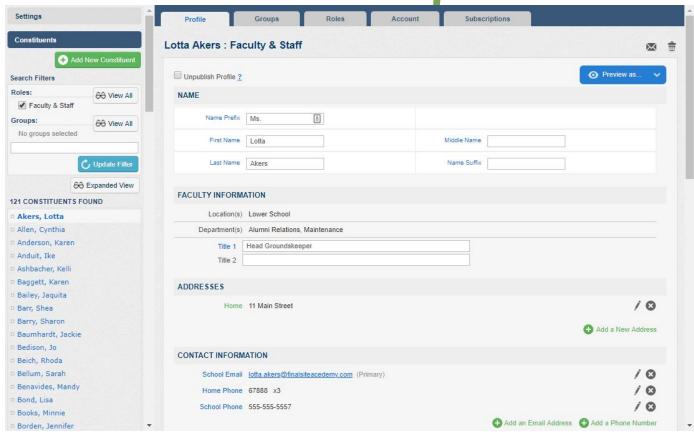- Data Uploads
- Data Integrations

Best Practices and Security Considerations

Other Finalsite Data Management options and tools...

Q & A

Constituent Data - Manual Management

- Search for Constituents

- Create Constituents

- Update Constituents

- Delete Constituents

- Export Data

Constituent Data - Manual Management

The good:

- Instant
- Easy (for small changes)

The bad:

- Tedious for bulk changes
- No automation

Who is this right for?

- Marketing only websites
- Managing just a single directory with few users
- Clients who have integrations but may have Finalsite-specific fields/data

Constituent Data - Data Uploads

- Using Datasheets to upload users in bulk

- Numerous Knowledge Base Articles covering templates

- Have the upload handled by our support team...

- ...or, train and use the uploader yourself

Constituent Data - Data Uploads

The good:

- Many changes in a go
- Previews

The bad:

- Can mean duplicate efforts in keeping data across systems in sync

Who is this right for?

- Faculty and Staff Directory only
- Small number of users on site
- Small shops where the person managing data in Finalsite and MIS are the same

Constituent Data - Data Integrations

Data Integrations involve a direct connection to an external system to allow for automated creation and updates for your constituent Data

https://www.finalsite.com/integration-overviews

Constituent Data - Data Integrations

Deployment Steps:

- Discussion + Addendum
- Introduction to one of our deployment specialists
- Enabling Access
- Testing on a sandbox site
- Mapping refinements
- Pre-Deployment data cleanup and review
- Deployment of integration on live site
- Wrap up

Constituent Data - Data Integrations

The good:

- Automatic
- Keeps systems in sync without duplicating effort

The bad:

- We can't support every MIS/SIS system

Who is this right for?

- Large number of users and data
- Anyone looking to avoid duplication of effort
- Anyone utilizing eNotify/Messages for email communication

Constituent Data - Other Options

Finalsite Open

- Option for MIS systems that we do not integrate with
- Datasheet based
- If exports from MIS can be automated, we can fully automate the integration
- Flexible Mapping

Finalsite's API

- Build-your-own solution using the Finalsite API
- Most customizable option
- Doc available: https://www.finalsite.com/page.cfm?p=3117
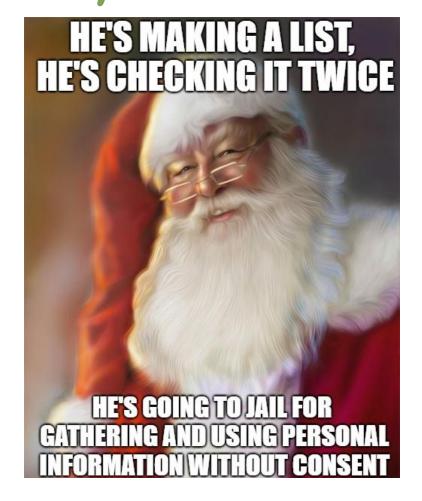
Best Practices + Security

Discuss, plan and implement policies for how your data is handled and updated (not just for Finalsite!)

- How is your data getting into your various systems?
- Who is doing that?
- When are they doing that?
- How does an update get communicated to all necessary parties?
- What are your data requirements?
- Who is reviewing the data? When?
- How are you coordinating data that needs rectification between systems? (Universal ID is a a great idea)

Best Practices + Security

- Only put data you need in Finalsite
- Only expose what needs to be
- Finalsite Messages will be enhancing our tools for ensuring GDPR Compliance

HE'S MAKING A LIST, HE'S CHECKING IT TWICE

HE'S GOING TO JAIL FOR GATHERING AND USING PERSONAL INFORMATION WITHOUT CONSENT

Other Data...

Calendar Data

- Uploads
- Live Calendars

Faculty Photos

- Can be uploaded via support request

Personal Reports

- Requires portals

Single Sign Ons

Questions + Helpful Links

Data Uploads

- https://www.finalsitesupport.com/hc/en-us/articles/115002886432-Upload-constituent-data-to-Constituent-Manager
- https://www.finalsitesupport.com/hc/en-us/articles/115002890931-Populate-constituent-datasheet-templates
- https://www.finalsitesupport.com/hc/en-us/articles/115005951268-Faculty-datasheet-template
- https://www.finalsitesupport.com/hc/en-us/articles/115000946567-Bulk-Uploading-Faculty-Images
- https://www.finalsitesupport.com/hc/en-us/articles/115001040668-Student-and-Parent-Portals-datasheet-template

Constituent Manager

- https://www.finalsitesupport.com/hc/en-us/articles/115001877452-Create-constituents-in-Constituent-Manager
- https://www.finalsitesupport.com/hc/en-us/articles/115001050388-Changing-constituent-usernames
- https://www.finalsitesupport.com/hc/en-us/articles/115001006027-Exporting-a-list-of-users-who-have-never-logged-into-the-site
- https://www.finalsitesupport.com/hc/en-us/articles/115001016827-Exporting-user-data-by-role-membership

Data Integrations

- https://www.finalsite.com/integration-overviews
- Finalsite API Documentation: https://www.finalsite.com/page.cfm?p=3117

Thank You!

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