

This session will provide you an in depth demonstration of the usage of the Data Exchange (DEx) Utility to import Membership records from a SQL Server linked Raiser's Edge database.

Minimum Requirements	Description
VISTA Version	Version 6.02 or later
Security Access	Your user group must have rights under Executables ->Data Exchange
RE7 SQL Login	The DEx connects to your RE7 using SQL Server. You must provide the username and password during the setup.
Database Backup	<u>This is a non-reversible process.</u> It is your responsibility to have made a valid backup of your data prior to running this utility.

## I. Prerequisites:

1. Set VISTA ID Card Definition
2. Run the Individual Data Cleanup Utility

## II. Create a Routine:

1. Specify Name and Data Components
2. Set RE Database Options specific to your configuration and use.
3. Specify Date Filters
4. Specify Record Matching Rules

## III. Test, Run and Validate:

1. Perform Test Import and Verify
2. Run The Routine
3. Validate Data using VISTA