WealthEngine Tessitura Interface

Copyright 1999-2016 by Impresario L.L.C.
(as an unpublished work subject to limited distribution and restricted disclosure only).
All Rights Reserved

NOTICES

The material contained in this manual is protected by the copyright laws of the United States of America and by international treaty as an unpublished work. Unauthorized use, reproduction or distribution of the material contained in this manual is punishable by civil and criminal penalty.

This material contains proprietary, confidential, and trade secret information of Impresario L.L.C. and is provided solely for use by licensees of the **Tessitura Software**® program and their authorized employees. Except as expressly authorized by Impresario L.L.C. pursuant to the terms of a written license agreement, no part may be used, disclosed, distributed, reproduced, transcribed, stored in a retrieval system, adapted or transmitted in any form by any means, electronic, mechanical, magnetic, optical, chemical, manual or otherwise.

Tessitura Software is a registered trademark of Impresario L.L.C.

Brand or product names mentioned in these materials are the trademarks or registered trademarks of their respective companies.

THE MATERIAL CONTAINED IN THIS MANUAL IS FURNISHED “AS IS” WITHOUT WARRANTY OF ANY KIND AND ALL WARRANTIES EXPRESS OR IMPLIED, ARE HEREBY EXCLUDED (INCLUDING, WITHOUT LIMITATION, ANY CONDITIONS OR WARRANTIES RELATING TO MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE). IMPRESARIO L.L.C. SHALL NOT BE LIABLE FOR ANY TECHNICAL OR EDITORIAL INACCURACIES OR OMISSIONS MADE HEREIN

The material contained in this manual is subject to change without notice. Impresario L.L.C. assumes no obligation to keep customers informed of any inaccuracies, updates, additions, deletions or other changes or modifications to any of the material contained in this manual.

IMPRESARIO L.L.C. SHALL NOT BE LIABLE FOR ANY SPECIAL, INCIDENTAL, INDIRECT OR CONSEQUENTIAL, PUNITIVE OR EXEMPLARY DAMAGES OR FOR LOST PROFIT, REVENUE, USE OR DATA IN CONNECTION WITH THE MATERIAL CONTAINED IN THIS MANUAL, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH LOSS.

Licensees are solely responsible for their use of this manual and the software to which it relates in full compliance with all applicable laws, rules and regulations and Impresario L.L.C. assumes no responsibility for informing licensees of any applicable laws, rules or regulations or any changes thereto that might occur from time to time.

TABLE OF CONTENTS

WEALTHENGINE TESSITURA INTERFACE **1**
WealthEngine Tessitura Interface Installation 1
WE RESULTS SCREEN **5**
WealthEngine Bulk Import Utility 5
Wealth Engine Criteria 7
WEALTHENGINE WEB REPORT **8**

WEALTHENGINE TESSITURA INTERFACE

WeatlhEngine provides wealth screening tools for donor research and prospecting. The WealthEngine Tessitura interface allows you to integrate WeatlhEngine products with Tessitura. FindWealth screening data can be imported into Tessitura, and WebConnect can be used to look up the FindWealth Online advanced profile for a constituent from the constituent record.

NOTE: Utilizing the WealthEngine Tessitura interface requires a subscription to WealthEngine services. For details see the WeatlhEngine page on the Tessitura Network website.

The interface includes the following components:

- An utility for importing FindWealth screening data
- A custom screen to display the FindWeatlh screening data on constituent records.
- List and extraction criteria for referencing FindWealth data
- A custom constituent report for displaying FindWealth Online advanced profiles

WealthEngine Tessitura Interface Installation

Installing the WealthEngine Tessitura Interface consists of the following:

- Downloading the Interface installation files from TASK
- Running the installation script
- Updating the LP_PREPROCESS_URL stored procedure
- Adding the Interface pbl to Tessitura
- Completing custom screen configuration
- Entering login details if using WebConnect
- Granting security rights for the WealthEngine Web report

NOTE: In order to use the WealthEngine Tessitura Interface you must be running v12.5.0 with Hotfix 25 (v1250HF25) installed or v12.5.1 with Hotfix 3 (v1251HF3) installed.

Downloading the Interface Installation Files

The WealthEngine Tessitura Interface components are available for download from TASK Online. This site can be accessed by the personalized logins into the support system (logins which have rights to submit help tickets).

To download the upgrade components, follow these steps:

1. Log into TASK Online at https://tessitura.nfpondemand.com. If you do not know your login please contact support administration supportadmin@tessituranetwork.com. Only the personalized logins to TASK Online have access to download version upgrades.
2. In the upper right hand corner select Version Upgrades and Patches from the Projects dropdown. The Version Upgrades and Patches project where the downloads are stored is displayed.
3. From the Category dropdown, select UTILITIES.
4. Find the WealthEngine Interface solution and open the details by clicking on any of the hyperlinked elements for the solution.
5. The File Download dialogue box displays, asking to open or save the file. Select Save. Do not open the file as part of this process.
6. The standard Windows Save As window displays prompting you to navigate to the staging folder. Save each of the files to a local file location.

Running the Installation Script

The WealthEngine Tessitura Interface installation script adds tables, utility procedures, a custom screen setup entry, a custom constituent report, and list criteria used by the interface.

1. Open *WealthEngine Interface SQL Install.sql* in SQL Server Management Studio Query window. Assure that you are connected to the server logged in as a SQL system administrator; the procedure will not complete correctly if the user does not have SQL system administrator or “sa” privileges.

   NOTE: Do not open and save the file in any other application before executing; doing so may cause formatting changes which will interfere with proper execution of the script.

2. Execute the script and examine the output results for errors. These are found on the Results tab, in red, followed by the details of the error.
3. If there are any errors in the result set, save the output to a file by clicking on the Messages pane and selecting Save As… from the File menu, and then contact Tessitura Network Support.

Updating LP_PREPROCESS_URL

In order to pass information to the wealthengine.com web site for the WebConnect interface you must manually add code to the LP_PREPROCESS_URL procedure. The required code is in the LP_PREPROCESS_URL WE ADDITIONS.SQL file, which is included in the installation files. Open the file and copy the code into your LP_PREPROCESS_URL procedure.

If you have not previously altered this procedure for other customizations, insert the WebConnect code prior to the following existing code:

```
-- return null so just run the original URL
```

```
Select Cast(null as varchar(2048))
```

Then add a BEGIN and END around the original code as follows:

```
BEGIN

-- return null so just run the original URL

Select Cast(null as varchar(2048))

-- if you want to return an error, just do this:

Select @errmsg = 'This is an error from LP_PREPROCESS_URL'

goto err_handler

END
```

This will assure that all other URLs passed to the procedure for browser based screens are returned unchanged.

If you have previously made alterations to this code for other custom browser based screens, be sure that you update your custom code so that it works with the new WebConnect code.

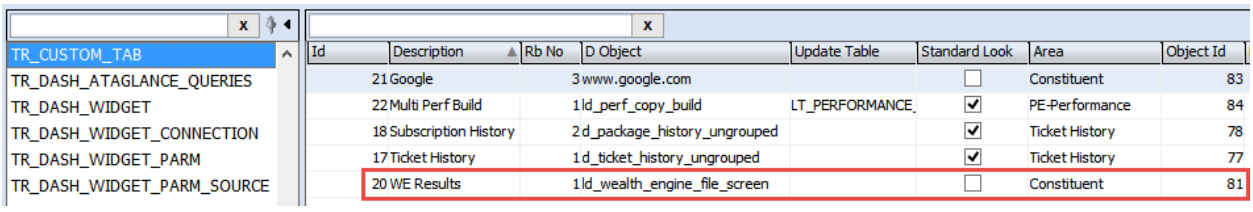
Adding the Interface PBL to Tessitura

The WealthEngine Interface PBL, included in the component file download, holds the custom constituent screen used to display the FindWealth screening data. The pbl must be placed in the folder that contains your Tessitura custom report and screen PBLs.

After the Interface PBL has been placed in the proper location you must add it to the list of PBL files in the LOCAL_LIBRARY_LIST entry in T_DEFAULTS. For example, if the file location is in the User Reports folder on your T drive, you would add T:\Tessitura\User Reports\wealthengine interface.pbl to the end of the string. All PBL file locations recorded in the LOCAL_LIBRARY_LIST entry must be separated by commas.

Completing Custom Screen Configuration

The installation script adds entries to TR_CUSTOM_TAB for the WealthEngine Results screen, but you must complete the configuration of these entries manually.



TR_CUSTOM_TAB

- TR_DASH_ATAGLANCE_QUERIES
- TR_DASH_WIDGET
- TR_DASH_WIDGET_CONNECTION
- TR_DASH_WIDGET_PARM
- TR_DASH_WIDGET_PARM_SOURCE

Id	Description	Rb No	D Object	Update Table	Standard Look	Area	Object Id
21	Google	3	www.google.com		☐	Constituent	83
22	Multi Perf Build	1	ld_perf_copy_build	LT_PERFORMANCE_	☑	PE-Performance	84
18	Subscription History	2	d_package_history_ungrouped		☑	Ticket History	78
17	Ticket History	1	d_ticket_history_ungrouped		☑	Ticket History	77
20	WE Results	1	ld_wealth_engine_file_screen		☐	Constituent	81

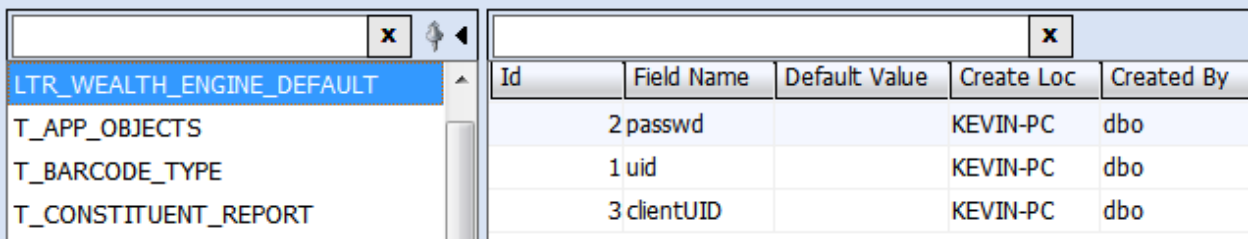
For the **WE Results** entry, enter the number of the radio button to which the screen is assigned in the **Rb No** column, then enter the corresponding security object ID in the **Object Id** column.

NOTE: If you already have 6 or more custom constituent screens, you will need to add an entry for the new WealthEngine Integration screen in T_APP_OBJECTS table before you can enter the Object Id in this table.

After this setup is complete you must grant the appropriate user groups security access to the new screen in the Security application. Only View rights should be granted.

Entering Login Details for WebConnect

If you are using WebConnect you must enter your account login details in the**LTR_WEALTH_ENGINE_DEFAULT** table:



NOTE: Contact your WealthEngine representative for your account login details, and confirm that your account is configured for use with WebConnect.

Enter your user ID in the **uid** row.

Enter your password in the **passwd** row.

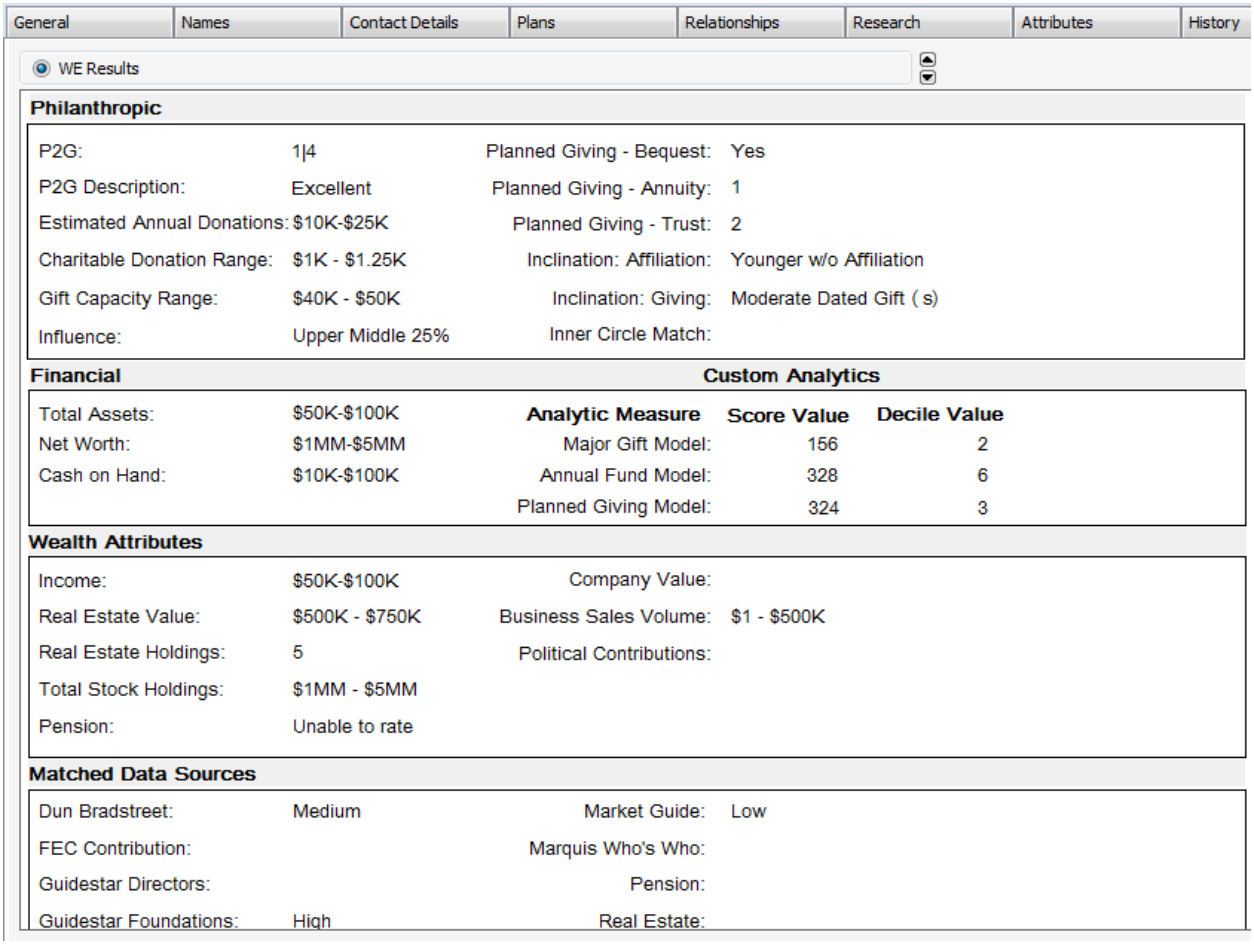
clientUID is no longer used and should be left blank.

Grant Security Rights for the WealthEngine Web Report

Users groups that will be using the WealthEngine Web report must be granted security rights to the Constituent Profile report, which is used as the security proxy for the WeathEngine Web report.

WE RESULTS SCREEN

The **WE Results** screen, located on the Custom tab, displays FindWealth screening data imported into Tessitura for a constituent:



For details on the FindWealth data, see the WealthEngine documentation.

The data displayed on this screen can be referenced by criteria in lists and extractions. Key WealthEngine data fields have been added as criteria as part of the WealthEngine Interface installation.

WealthEngine Bulk Import Utility

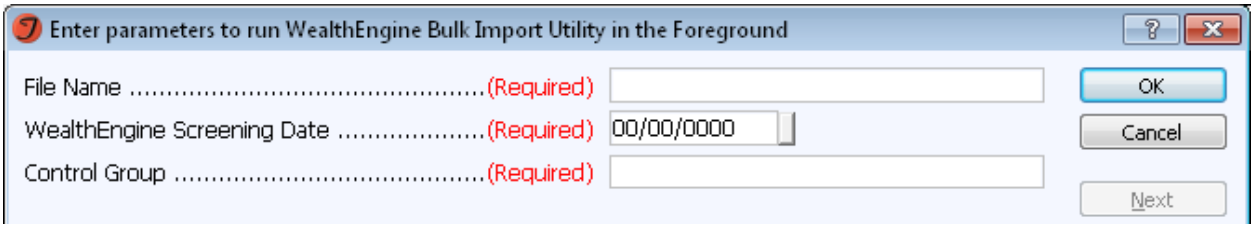
The WealthEngine Bulk Import Utility is used to import FindWealth screening files into Tessitura for display on the WE Results custom screen. WealthEngine will provide the data as a tab-delimited text file that only needs to be placed in a location accessible to SQL server.

If a constituent included in an import file already has WealthEngine data on file, that data is overwritten by the more recent import.

You have the option of applying a control group to the imported data.

Utility Parameters

The WealthEngine Bulk Import Utility uses the following parameters:



File Name – The path and file name of the file being imported. The file must be accessible to SQL Server and the pathname needs to be in UNC format (for example: *\\myserver\myshare\WE_import\import_file.txt*). Because the bulk copy process is executed by the SQL Server, the file path is interpreted from SQL Server, rather than from the user's workstation. In order to use file paths with mapped drive letters (e.g. *C:\My Files\WE_import\import file.txt*), the drive letters must be mapped on the machine running SQL Server.

WealthEngine Screening Date – The screening date to record for the entries created by the import.

Control Group – The control group to apply to entries created by the import file. If you do not want to apply a control group to the imported data, select **(Default Control Group)**.

Utility Output

The utility output presents the technical log information for the import:

Autumn Ridge Performing Arts Center

WealthEngine File Import Utility

Run By ksheehan
Run Date 10/3/2012 03:10 PM
Page 1 of 1

Parameters: **Input Data File: C:\Tessitura12\Test.txt**
WealthEngine File Date: 2012-10-04

0	Begin	10/3/2012 15:10:45	Begin processing at Oct 3 2012 3:10PM
0	Action	10/3/2012 15:10:45	Import Wealth Engine records
0	WE File Received Date	10/3/2012 15:10:45	Oct 4 2012 12:00AM
0	Import file name	10/3/2012 15:10:45	C:\Tessitura12\Test.txt
0	BCP	10/3/2012 15:10:45	bcp impresario.[dbo].LTW__WEALTH__ENGINE__IMPORT in "C:\Tessitura12\Test.txt" -c -T -SKEVIN-PC\NEXT__GEN
0	BCP	10/3/2012 15:10:45	Starting copy...
0	BCP	10/3/2012 15:10:45	1 rows copied.
0	BCP	10/3/2012 15:10:45	Network packet size (bytes) : 4096
0	BCP	10/3/2012 15:10:45	Clock Time (ms.) Total : 15 Average : (66.67 rows per sec.)
1	Count	10/3/2012 15:10:45	Number of imported records
0	End	10/3/2012 15:10:45	Processing completed at Oct 3 2012 3:10PM

The total number of records imported will be listed toward the end of the results. If the file has been previously imported, the import will be canceled, and that reason noted in the log.

Wealth Engine Criteria

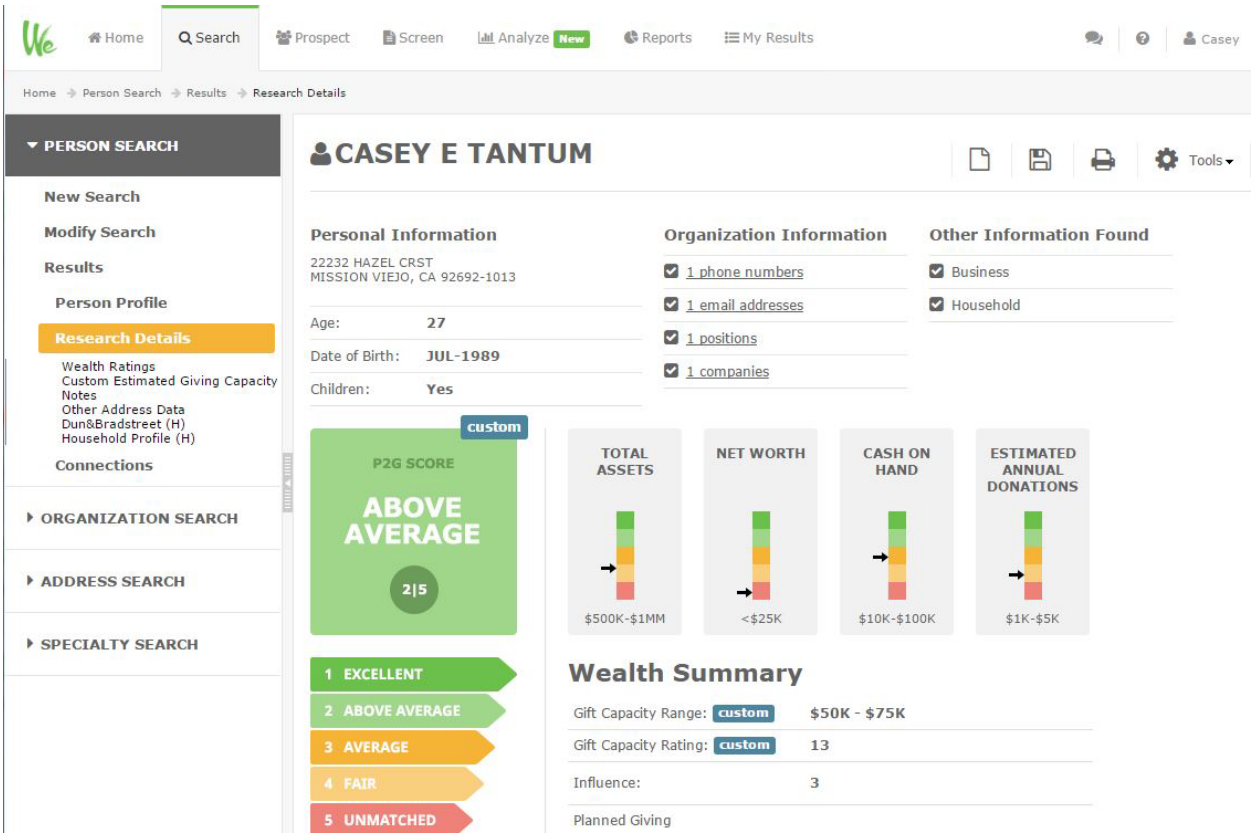
The WealthEngine Tessitura Interface includes criteria for lists and extractions that reference imported FindWealth data. The following WealthEngine criteria are added (and grouped in the WeathEngine criteria category):

- Bequest
- Cash on Hand
- Charitable Donation Range
- Est Annual Donations
- Income
- Influence
- Networth
- P2G Score
- P2G Score 2
- Political Contributions
- Real Estate Holdings
- Real Estate Value
- Stock Holding
- Total Assets

NOTE: For an explanation of the data referenced by these criteria, see WealthEnginge documentation.

WEALTHENGINE WEB REPORT

The **WealthEngine Web** report, located on the **Constituent Report** sub-menu of the **Constituent** menu, displays a constituent's FindWealth Online advanced profile in Tessitura:



When you run the report, the constituent's name and primary address is passed to FindWealth Online to perform an advanced search.

NOTE: For a successful search, you should run this report from an individual's record, not a household record, as the household name is unlikely to generate successful search results.

For details on the FindWealth Online profile, see WealthEngine documentation.