



# New Member Submission Guide

Welcome to a TRG Community Network. This guide gives you everything you need to know to send us high-quality data, so you start off right! The guide is for new members, who are submitting data to the TRG Data Center for the first time. If you're already a member, ask for details on refreshing your data.

## Inside this Guide

- Timeline for Joining
- Submission Process Overview
- Step 1 - Complete the New Member Survey
- Step 2 - Prepare Your Data for Upload
- Step 3 - Submit Your Data
- Step 4 - Check Your Data for Errors
- Step 5 - Complete TRG Data Center Training
- Step 6 – Attend Quick Wins Training
- Appendix A - Segment Type Definitions
- Appendix B – Data Preparation Worksheet

## Who do I talk to with questions?

For questions regarding any step of the Data Submission Process or Data Center functionality, please view the online trainings in Data Center. These can be accessed from the main page by clicking Training > View All Courses > Quick Start Videos. Courses are listed in recommended order from top to bottom.

If you still have questions after viewing training materials, contact the TRG Help Desk at [help@trgarts.com](mailto:help@trgarts.com).

For questions regarding your Community Network membership, local administration, or network policy, please contact your local partner organization. This is typically the arts council, theatre alliance or service organization that operates the local logistics of the program. For a list of TRG Community Networks and partner organizations, go to: <http://www.trgarts.com/Whatwedo/CommunityNetworks/FindaNetworknearMe.aspx>.

## Timeline: When Can I Join?

New members can join on one of the following dates below. Data that is submitted will be live in the Data Center within 5 business days; however, data will not be run through NCOA hygiene and ready for use until 5 business days after the submission deadline.

### New Member Timeline to Join

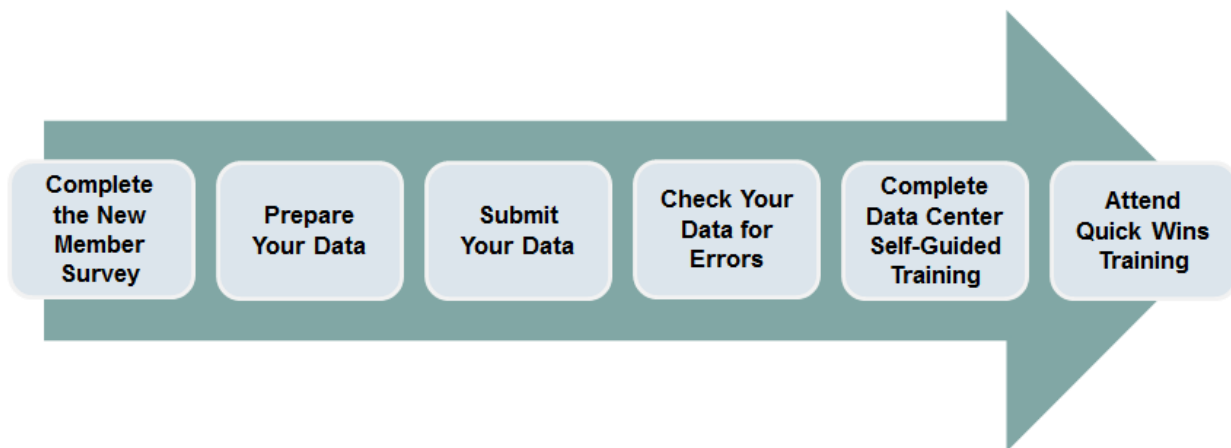
Please note the following dates and deadlines for joining your Community Network.

|   | 2016 Q3 | 2016 Q4  | 2017 Q1 | 2017 Q2 | 2017 Q3 | 2017 Q4  |
|---|---------|----------|---------|---------|---------|----------|
| <b>New Member Survey Deadline</b><br>Each organization must fill out this survey, which lets TRG know how to create your organization account and user login credentials in Data Center:<br><a href="https://www.surveymonkey.com/s/newdatacenter">https://www.surveymonkey.com/s/newdatacenter</a> . | 7/1/16  | 10/3/16  | 1/27/17 | 4/21/17 | 7/14/17 | 10/13/17 |
| <b>Upload Window Begins</b><br>Login credentials are sent to all new members, to begin loading data.  | 7/8/16  | 10/10/16 | 2/3/17  | 4/28/17 | 7/21/17 | 10/20/17 |
| <b>Segmentation Strategy Training</b><br>This is a 60 minute session.   |         | 10/12/16 | 2/8/17  | 5/3/17  | 7/26/17 | 10/25/17 |
| <b>Submission Deadline for Data</b><br>All data must be uploaded and import completed by 5pm MST on this day.   | 8/12/16 | 11/14/16 | 3/10/17 | 5/26/17 | 8/18/17 | 11/17/17 |
| <b>Error Correction Deadline</b><br>All files must be checked for errors and corrected files must be uploaded and imported by 5pm on this day.  | 8/19/16 | 11/21/16 | 3/17/17 | 6/2/17  | 8/25/17 | 11/26/17 |
| <b>Hygiene Begins</b><br>TRG will begin running all files through National Change of Address (NCOA) processing.   | 8/23/16 | 11/23/16 | 3/20/17 | 6/5/17  | 8/28/17 | 11/27/17 |
| <b>Data Live in Data Center</b><br>NCOA hygiene reports will be live in Data Center, and new organizations will be visible to their Community Network members for trade requests.   | 8/30/16 | 12/2/16  | 3/27/17 | 6/12/17 | 9/4/17  | 12/4/17  |
| <b>Data Center Quick Wins Training</b><br>This is a 75 minute session.  | 9/7/16  | 12/9/16  | 4/5/17  | 6/21/17 | 9/13/17 | 12/13/17 |

Once you submit your initial data at one of the deadlines above, you will be able to load new data any time using File Import Wizard. Your data will be run through NCOA quarterly.

## Submission Process Overview

Below is an overview of the process you'll go through to get started. We'll provide more detail on each step in subsequent pages.



**Step 1 – Complete the New Member Survey**– The survey lets us know your basic organization details and the contact information of your staff who will need login credentials.

**Step 2 – Prepare Your Data** – Take inventory of your data against the required fields for participation, and design your segmentation strategy for the data load.

**Step 3 – Submit Your Data and NCOA** – Once you've prepared your data, you can begin submitting your data into TRG Data Center using the File Import Wizard tool. Training on the wizard is available on the Data Center Training page. Upon your first time login, you'll be prompted to complete your Processing Acknowledgement Form (PAF), required by the USPS. The PAF gives us permission to run your data through NCOA hygiene.

**Step 4 – Check Your Data for Errors** – Run the data quality reports in the Data Center to find and fix any errors in your data import.

**Step 5 – Complete TRG Data Center Training** – After you submit your data, it will be run through NCOA hygiene and ready for use by the date listed above. During this time, please login to view the full suite of training courses, including how to build lists, run reports, and more.

**Step 6 – Attend Data Center Quick Wins** – Attend this live, interactive training session to help you get started on building lists and conducting patron research.

### Step 1 – Complete the New Member Survey

In order to best serve you, we ask that you take a few minutes to complete a brief survey about your organization. This will help us set up your account logins and ensure that you get the most out of Data Center. Before taking the survey, please be prepared with contact info for all staff members who will need login credentials to your Data Center account. The survey shouldn't take you more than a few minutes and can be completed by following this hyperlink: <https://www.surveymonkey.com/s/newdatacenter>

### Step 2 – Prepare Your Data

Think about the various types of patron lists (aka segments) you have within your organization, considering the past several seasons or memberships cycles. Consider where those segments are housed: in your database, CRM, ticketing system, donor or fundraising system, education lists, staff or artist lists, volunteer lists, etc. The more segments you upload, the greater will be your capacity to use the system to its full advantage.

## Segmentation Strategy Training

We recommend that you attend the Segment Strategy Training session to jump start your thinking around how you would segment your data. In this interactive, hands on session, we'll explain how to use the self-guided materials and will provide specific examples and recommendations. We'll answer your questions about your specific situation and we'll end with a brief demonstration about how to prepare your file for import. You'll receive an email from TRG Arts which will include a registration link for this session after you receive your username.

## How much data should I submit?

We recommend that you treat the TRG Data Center as your own online communications tool (not just a trading mechanism) and import *ALL the data you have available on all patrons and their transactions from the last five years*. With complete data, you'll get a holistic view of each patron's total interactions with you—helping you better qualify prospects for your own campaigns. Plus, with all of your data in the system, you can create trade lists that do not need to be merged with external data from your database(s), saving you money at the mail house.

## What if I don't want other organizations to see some of my data?

Any patron segments you upload can be hidden from trading partners, so that only your organization can use them. No one can see your lists without your permission, and strict security measures ensure that your data remains in your control. As an additional safeguard, you can upload valuable patrons as a Do Not Trade segment, ensuring that their names will never be traded, regardless of whether they also appear in other segments.

## What fields are required, and how should I segment my data?

Choose wisely when you segment, as this will impact how you use Data Center to build lists. As a basic member, you will upload two types of data: patron biographical data + basic segmentation data. For a complete list of fields, see *Appendix B – Data Preparation Worksheet*.

### Biographical Data

These fields include standard contact info, such as patron name, address and email, as well as the ability to load unique IDs from your database or CRM. All records must contain a patron name and mailing address, to assist with the de-duplication and demographic append processes that will happen later in the TRG Data Center. You will not de-duplicate your lists at the time of upload; a patron will appear in multiple segments if they had multiple interactions with you.

### Basic Segmentation Data

TRG requires three, standardized segmentation fields for all records you upload. These fields are the most important data you will send, so please ensure that you've defined a consistent strategy for their use *before* you begin the upload process:

- **Year** – The four-digit year in which the patron interaction occurred. If it crossed multiple years (e.g. the 2013-14 season), use the latest year in the series.
- **Segment Type Code** – This code describes the category of patron interaction represented in the segment (e.g. Single Ticket, Subscription, Suppression). You

must choose from one of the TRG standard segment types. See Appendix A for a complete list.

- **Segment Description** –This field provides more detail about the segment type you’ve chosen. It is crucial that you use this field thoughtfully and consistently in order to make your data useful. *You’ll want to create internal rules for your organization and stick to them, so that you can study patrons over time.* TRG recommends the following segmentation strategy for these five, most commonly-used segment types:

| <b>Segment Type</b>  | <b>What to put in the Segment Description field</b>      |
|----------------------|--|
| <b>Single Ticket</b> | Name of the event (e.g. <i>Sleep No More, Van Gogh</i> ) |
| <b>Flex</b>          | Name of package or series (e.g. three-play)              |
| <b>Subscriber</b>    | Name of package or series (e.g. Pops, Story)             |
| <b>Member</b>        | Type of membership (e.g. dual, family, senior)           |
| <b>Donor</b>         | Donor level (e.g. \$500-\$1000, Conductor’s Circle)      |

### **View Segmentation Training Materials**

TRG Arts strongly recommends that you view the training materials on segmentation, which will help you organize your data in the most powerful, practical ways. Access these materials by logging into Data Center, then click Data Center Training > How to Plan Segmentation.

### **What if the files from my database don’t contain the segmentation fields**

**above?** The Basic Segmentation fields above can be submitted in two ways: 1) by adding them to your files before you upload them, or 2) by adding them at the time of import. Note that the second option requires uploading data one segment at a time (not recommended for large data loads).

### **Step 3 – Submit Your Data and NCOA PAF**

Once your files have been prepared, you can submit them easily using the File Import Wizard within the TRG Data Center. You will be able to login to Data Center soon after you complete the new member survey from step 1. A TRG representative will send you login information via email and you will be able to begin submitting data at that time.

### **Do I need to format my files in a certain way?**

The File Import Wizard accepts files in the following formats: .txt, .csv, .xls or .xlsx. You do not need to rename your fields or follow any specific file layout; instead, the Wizard will ask you to map your fields to TRG standard attributes during the import process. You must adhere to basic data management practices, so do review the File Preparation materials on the training page.

**How do I get my data into the TRG Data Center?**You’ll use the File Import Wizard, which you can launch after you log into the TRG Data Center. File Import Wizard is divided into two parts, the File Manager and the Import Wizard:

## File Manager

This tool allows you to upload files from your computer to the Data Center. Think of it like Google Drive, DropBox, or an FTP website.

## Import Wizard

After you have uploaded a file using File Manager, you'll use the Import Wizard to tell TRG how the data fields in your files line up with the standard fields in the TRG Data Center. This helps us ensure that every organization in your community is able to work with a unified set of data fields.

### How do I learn the File Import Wizard tool?

We've built training right into the Data Center, so you can learn at your own pace while logged into the system. You'll receive a log-in and password with instructions for how to access training once your account is ready in Data Center. Data Center training is self-guided, but we do understand that there are times when you need questions answered that are not covered in the training materials or when you may need additional assistance. If you still have questions after viewing the online training materials, please email [help@trgarts.com](mailto:help@trgarts.com).

### How long will it take for my data to be ready for use, after I import a file?




To keep the TRG Data Center running smoothly during normal business hours, files are queued for import overnight, when fewer users are working in the system. TRG Arts guarantees that the data will be available for use within five business days, though data is often available the next business day. After you import your file, you'll see the status change to *Pending Approval* while TRG approves your file mapping, and TRG will be in touch with you if your file mapping is denied. Once the file mapping is approved, the status is *Import Queued* as it gets imported. It will say *Import Complete* once it the data is in Data Center. *Note that your data will not be run through NCOA hygiene until the date specified on page two; any lists built before that time should be hygiened by your mail house.*

## NCOA PAF

The National Change of Address Processing Acknowledgement Form (PAF) gives us permission to run your data through NCOA hygiene, and is required by the USPS. The submission of your PAF is automated within Data Center, so when you log in the first time, you'll be prompted to complete the form. Click on the online help menu if you need assistance or write to [help@trgarts.com](mailto:help@trgarts.com).

## Step 4 – Check Your Data for Errors

To help you identify and fix errors, the File Import Wizard gives you data quality reports, which identify uploaded data that is invalid or incomplete. These data quality reports can be found in File Manager under the Action column, as well as in the My Reports section. It is your responsibility to view these reports and fix any errors *before the end of your upload window*. Charges will apply if TRG is asked to fix data errors after the upload window closes.


| File Name     | Status          | Upload Date         | Uploaded By | Actions   |
|---------------|-----------------|---------------------|-------------|---|
| _eM269_13.txt | Import Complete | 02/01/2014 12:09 AM | test        |    |

### Will TRG notify me of problems with my data import?

Yes. The user who imports the file will receive an email confirmation when the file import is complete and also shows any validation, parse, or load errors. Organizations are expected to view the Import Details Report in File Manager and correct errors accordingly.

If you have questions about your reports, feel free to email them to [help@trgarts.com](mailto:help@trgarts.com).

### What types of errors might occur, and how do I fix them?

Once a file has been imported, the Import Details icon  is activated in the Actions column of the File Manager. If you click on this icon you will see the results of the latest import for that file. Only records that do not contain errors will be loaded; records that do contain errors will not be loaded. There are three types of errors that appear in the Import Details Report:

#### Validation Errors

TRG Data Center performs a series of data validation checks on the field values being imported. For example, you'll get an error if you enter letters in a zip code field, numbers in the state field, or leave a required field blank.

**To Fix:** Download the records with errors, review and correct the errors in the spreadsheet, and reload the corrected records using the add (not replace) function of the File Import Wizard. Go to Data Center Training > How to Import Segments > Validation Errors for detailed instructions.

#### Load Errors

Load errors are caused if the TRG Data Center computers encounter a problem.

**To Fix:** Email [help@trgarts.com](mailto:help@trgarts.com) to report the error to TRG for correction.

#### Parse Errors

Parse errors occur when the fields in a file are not separated with an acceptable delimiter in a consistent manner. Delimiters include comma, tab and pipe delimiters. **To Fix:** Download the records with errors, review and correct the errors in the spreadsheet, and reload the corrected records using the add (not replace) function of the File Import Wizard.

### What else should I check for, besides the errors in the Import Details Report?

Common errors include incorrect counts (e.g. only a few 2013 subscribers show up when there should be 7,000) or incomplete data (e.g. only 10% of records have the First Name field populated.) To check these after your import is complete, you should run the following two reports, found in the My Reports section of Data Center:

### **Segment Inventory Report**


This report will list the segments you have uploaded, along with the number of records in each field. After you've imported all of your segments, view this report to double check that each segment count matches the number of records you wanted to upload. This report is easiest to read if you export it to Excel.

### **Data Completeness – Organization Report**

This report will tell you what percentage of the fields are populated in your data. For example, if the report tells you that the Last Name field is populated for only 20% of your records, you have likely loaded many segments incorrectly.

If you find significant errors in either of these reports, you will need to override the segment(s) with new, corrected data.

## **Step 5 – Attend Training on the TRG Data Center**

As soon as you get your login to the TRG Data Center, you'll be able to access training videos and materials easily, right in the Data Center. Each page contains in-application help text denoted by a red question mark.  In addition, the Training Section contains step-by-step videos and downloadable training aids so you can learn at your own pace. To access these, simply select View All Courses. To get started, we recommend watching the following:

- Quick Start – Navigation & Help
- Quick Start – Basic Upload and Import
- Quick Start – My Account and Settings
- Quick Start – Building a List
- Quick Start – My Trades
- Quick Start – My Reports

If you still have questions after watching these videos, you can send support requests to [help@trgarts.com](mailto:help@trgarts.com).

## **Step 6 – Attend Quick Wins Training Session**

Now that you've loaded your historical data, how can you jump in quickly to maximize Data Center? In this hands-on, interactive session, you'll build lists and run reports in real time, helping you better understand your market position. You'll walk away with a sense of how your audiences compare to your peer organizations by demographic characteristics and geographic distribution, as well as what other arts events your patrons attend in your community. You'll receive an email from TRG Arts which will include a registration link for this session the same data of the data submission deadline.



## Appendix A – Segment Type Definitions

Below are the TRG standard Segment Types and definitions. All segments uploaded into the TRG Data Center must be labeled with one of the following Segment Type Codes (the *second column* in the table below).

| Segment Type   | Segment TypeCode | Definition   |
|----------------|------------------|--|
| Single Ticket  | <b>STB</b>       | Patrons who purchased a ticket or admission to a single event, performance, museum, cultural facility, etc. This may also include free events.   |
| Flex / CYO     | <b>FLX</b>       | Patrons who purchased a flexible ticket package, such as vouchers, choose-your-own packages, etc.  |
| Subscription   | <b>SUB</b>       | Patrons who purchased a ticket package, typically to a single season, series, venue, etc.  |
| Membership     | <b>MEM</b>       | Patrons who purchased a membership granting admission or other benefits, generally for a year or season.   |
| Donation       | <b>DON</b>       | Patrons who made a charitable gift given to an organization or establishment, generally tax deductible   |
| Do Not Mail    | <b>DNM</b>       | Patrons who do not want to be contacted via direct mail pieces.  |
| Do Not Trade   | <b>DNT</b>       | Patrons who do not their contact information to be traded with other organizations in the TRG Data Center  |
| Do Not Call    | <b>DNC</b>       | Patrons who do not want to be contacted via telephone  |
| Do Not Email   | <b>DNE</b>       | Patrons who do not want to be contacted via email  |
| Suppression    | <b>SUP</b>       | Patrons who do not want to be contacted via any channel or appear in trades. Only use this segment type for patrons who you never want to contact via any channel.   |
| Class          | <b>CLA</b>       | Patrons who attended a workshop or class to learn a skill or gain knowledge of a particular subject matter.  |
| Education      | <b>EDU</b>       | Patrons who attended an educational event. Common examples include lectures, talk-backs, demonstrations, etc.  |
| Group Purchase | <b>GRP</b>       | Patrons who attended as part of a bulk purchase of single tickets, subscriptions, memberships, etc., often at a discount. These purchases tend to be made by companies or clubs, or a large group of individuals together. |
| Prospect       | <b>PRO</b>       | Prospective patrons who have inquired about a program or organization. Common uses include patrons who have requested information via website, email or phone, filled out an interest card, entered a raffle/drawing, etc. |
| Comp           | <b>CMP</b>       | Patrons who attended an event with a complimentary, free ticket.   |
| General        | <b>GEN</b>       | Patron lists that do not fit into an existing segment type.  |

## Appendix B – Data Preparation Worksheet

The following table shows the available fields for import into the TRG Data Center. Fields denoted by an asterisk(\*) are required to complete the import process.

To ensure that you have all the necessary data, you can use the worksheet below to check the fields from your database against the TRG standard fields. You do *not* need to change your field names to match. This worksheet is for your internal use only and is not required, but it will help you when it comes time to map your fields to TRG's during the import process.

| TRG Standard Field    | Definition  | My Database Field Name |
|-----------------------|---|------------------------|
| <b>Prefix</b>         | Patron's name prefix, such as Mr., Mrs., Hon.   |                        |
| <b>Salutation</b>     | Patron's display name for mailings. For example, "Mr. John Smith" or "Mr. Smith."   |                        |
| <b>First Name**</b>   | First name of the patron  |                        |
| <b>Middle Name</b>    | Middle name of the patron   |                        |
| <b>Last Name**</b>    | Last name of the patron   |                        |
| <b>Full Name**</b>    | Full name of the patron, including Prefix, First Name, Middle Name, Last Name, and Suffix   |                        |
| <b>Suffix</b>         | Suffix behind a name, such as Jr. or Sr.  |                        |
| <b>Company Name**</b> | The name of the company associated with the interaction defined in the segment. This is used when the patron is a company or when the patron is associated with a company |                        |
| <b>AddressLine1*</b>  | Primary address line. When only one address line is available, this field should be used and NOT AddressLine2 or AddressLine3   |                        |
| <b>AddressLine2</b>   | Secondary address line. Used when an address contains multiple lines, such as an apartment number   |                        |
| <b>City*</b>          | City where the address is located   |                        |
| <b>StateCode*</b>     | Two character abbreviation for a US state or Canadian province  |                        |
| <b>PostalCode*</b>    | US or foreign postal code   |                        |
| <b>OrgAddressID</b>   | A unique identifier for an address that is generated by an organization's database  |                        |
| <b>EmailAddress</b>   | A patron's primary email address  |                        |
| <b>EmailAddress2</b>  | An additional email address for the patron  |                        |
| <b>EmailAddress3</b>  | An additional email address for the patron  |                        |
| <b>EmailAddress4</b>  | An additional email address for the patron  |                        |
| <b>HomePhone</b>      | A patron's home phone number  |                        |

|                           |  |
|---------------------------|--|
| <b>BusinessPhone</b>      | A patron's work phone number   |
| <b>OrgPatron ID</b>       | Patron ID generated from an organization's database used to identify an individual   |
| <b>Segment Year</b>       | The four-digit year in which the patron interaction occurred. If it crossed multiple years (e.g. the 2013-14 season), use the latest year in the series. This field should be included for every segment type except suppressions. |
| <b>SegmentTypeCode***</b> | This field must match exactly one of TRG's standard Segment Type Codes (see Appendix A for a complete list)  |
| <b>SegmentDesc***</b>     | This field provides more detail about the segment type you've chosen and is the most important field to using the TRG Data Center effectively (see page 3 of this guide for more details on segmentation strategy)                 |

\* Denotes a required field

\*\*You must submit *either* First Name and Last Name OR Full Name OR Company Name

\*\*\*If your files do not contain the segmentation fields, you may add this information at the time of upload. However, this option requires that you upload and import each segment individually, as a separate file. This is not recommended for large data uploads.