New Member Submission Guide

TRG ARTS DATA CENTER

Welcome to a TRG Community Network. This guide describes the New Member Add-in process and answers key questions to help 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.

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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 Help in the top bar of Data Center then select a training topic at left. Courses are organized by each part of Data Center so you know what each component does and how to use it.

If you still have questions after viewing training materials, contact the TRG Help Desk at help@trgarts.com.

For questions regarding your Community Network membership, please contact TRG. 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 a monthly basis using the basic timeline below.

New Member Timeline to Join

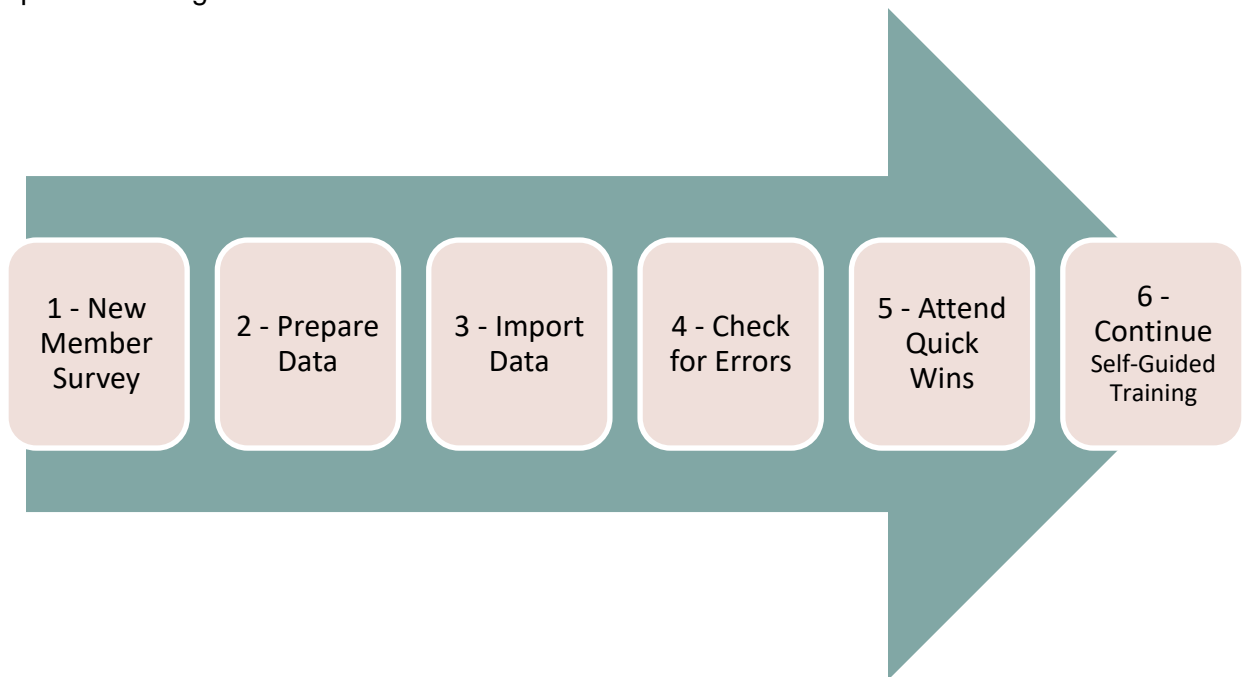Please note the following days and deadlines for joining your Community Network.

Action	Monthly Join Dates
New Member Survey Received Each organization must fill out this survey, which lets TRG know how to create your organization account and user login credentials in Data Center: https://www.surveymonkey.com/s/ newdatacenter.	Completed by the 1st business day of each month Day 1
Upload Window Begins (Login credentials and guide sent to all identified users.)	Second Business Day of each Month
Kick-off and Segmentation Strategy Training (This 60 minute session is included in your startup fee)	Second business Day of each month Day 2 (same as the start of your upload window)
Hygiene Begins TRG will begin running all files through National Change of Address (NCOA) processing.	~17 business days after the start of the upload window.
Data Live in Data Center NCOA hygiene reports will be live in Data Center, and new organizations will be visible to their Community Network members for trade requests.	Deliverable is flexible based on when organizations complete file import but no later than the last week of the month.
Data Center Quick Wins Training (75 Minute session Included in your Start-up Fee)	Second Tuesday in the month following your live date.

Once your initial data completes NCOA processing, you will be able to load new data any time using File Manager. Your data will be run through NCOA quarterly thereafter.

Submission Process Overview

Below is an overview of the process you'll go through to get started. We'll provide more detail in specific training modules.

| 1 - New Member Survey | 2 - Prepare Data | 3 - Import Data | 4 - Check for Errors | 5 - Attend Quick Wins | 6 - Continue Self-Guided Training |

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

Step 2 – Prepare Your Data – Attend Segmentation Strategy Training on the 2nd business day of the month. 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 PAF – 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 – Attend Data Center Quick Wins – Attend this live, interactive training session to help you get started on building lists and conducting patron research.

Step 6 – Continue TRG Data Center Self-Guided Training – After you submit your data, it will be run through NCOA hygiene and ready for use by the Live date listed on page 2. During this time, please login to view the full suite of training courses, including how to build lists, run reports, and more.

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 information for staff members who will need initial login credentials to Data Center. You can add more users later and are not limited to the number of users. The survey shouldn't take you more than a few

minutes and can be accessed by clicking 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 your capacity will be to use the system to its full advantage.

Kick-Off & Segmentation Strategy Training
We recommend that you attend this training session to get a quick overview of the expectations during the add-in month and understand 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 that includes a registration link for this session.

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 whether they also appear in other segments.

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.

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.

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 go to File Manager where you'll upload your files and then you'll import them into Data Center. The pertinent training materials are linked in your Welcome email.

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. Help Desk will be in touch with you if your file mapping is denied and will explain the error and how to correct it. Once the file mapping is approved, the status changes to *Import Queued*. It will say *Import Complete* once the data is in Data Center. *Note that your data will not be run through NCOA hygiene until the day specified on page two. Any lists built before that time MUST 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.

What happens if I miss the NCOA deadline?

If you have imported data after NCOA is run, then you must either wait until the next monthly New Member NCOA or regularly scheduled quarterly NCOA. If you must use your data before those dates, then you have the option to pay for an Out of Cycle NCOA which is a minimum charge of $150. Contact Help@trgarts.com to make that request.

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 ↑	User		
Pop Con 2015_2017 TB.csv	Import Complete	02/07/2018 2:16pm	lhenry	⬇	⋮
2018 Feb - Fashion Machine.csv	Import Complete	02/05/2018 12:12pm	lhenry	View Report	
16-17 Hamilton Subscribers.csv	Ready for Import	01/23/2018 12:41pm	lhenry	Download	
				Delete	

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.

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

Once a file has been imported, the View Report link is activated in the actions menu for that file in Imports. Click on the link to see the results of the latest import for that file. Only records that do not contain errors will be loaded; erred records require review and correction. See the Validation Error Import training materials in the Help menu for specific instructions.

Step 5 – 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.

Step 6 – Continue Self-Guided Training in 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 Data Center. Click on the Help 🔴 button and select a training topic at left to expand the available training materials OR search for a search term.

If you still have questions after watching these videos, you can send support requests to help@trgarts.com.