



Sumac Data Conversion

You've done the research, you've made the right choice, and now you're ready to start using Sumac! We want to help you get the most out of your Sumac so we've put together this short guide to the data conversion process. Read to learn more about how we convert your data, and what to expect after the conversion is complete.

The Process

1. You Send Your Data

You send us the data that you want transferred into your Sumac database. Your data might include:

- Databases (tables converted to spreadsheets)
- Donations
- Event attendance information
- Mailing lists
- Accounting contacts
- Board lists
- Email lists
- Any other data you have in spreadsheets

All your data must be in spreadsheet or table format (e.g. tab-delimited text, csv, xls, xlsx, ods).

If you need help extracting data from its current location, let us know. We have done this many times and can often provide useful assistance.

2. We Map Your Data

We will analyze all the spreadsheets and their contents to figure out how best to import each column into an appropriate place in a data record in Sumac. The map is documented in a word processing document that shows every column in every file you send and explains how it will be converted.

3. We Send You the Mapping Document

We will send you the mapping document for careful review. When you receive the data mapping, you will easily understand some of it, but some of it will be unclear. There will also be things that we don't understand, so the mapping will include question marks indicating where we require clarification.

You will note areas where we require clarification, and record any questions you might have for us.

4. We Discuss and Amend the Mapping

After you read the mapping, we will have a phone call to sort out the things we don't understand in order to resolve misunderstandings and clarify the mapping document. During the phone call, we will amend the data mapping to correct things that can be immediately resolved. We may also both have action items to clarify parts of the mapping.

It usually takes a couple of amendment-phone-call cycles to get a final data mapping.

5. You Approve the Mapping

When everyone is satisfied with the data mapping, you need to approve it. You will sign off that you have read and understand the data mapping, that you will send the data a second time (see step below) in the same format, and that the data mapping includes all the files to be converted.

6. We Schedule Installation and Training

Typically, we do installation and training on the same day. To make this most effective, we try to do it as soon as possible after the data conversion is complete, so that the data being used in Sumac is the most recent data available. For these reasons, we will schedule the date for installation and training, then work backwards from there to decide when the data conversion needs to be done.

7. You Send Your Data Again

The data mapping process usually takes a few weeks, during which some of your data may have changed, so you need to send us updated versions of the data. Usually this is done one to two weeks prior to the installation, depending on the amount and complexity of the data.

8. We Convert the Data

We import your data, using the approved data mapping document as our guide. If we encounter any problems (e.g. missing mandatory data, ambiguous data), we note them in the mapping document.

Before importing the data into your new Sumac database, we ensure that each column contains the correct data type, for example that a column that is supposed to contain postal codes actually contains postal codes. This usually entails re-formatting and correcting data like dates, postal codes, phone numbers, email addresses, and currency amounts.

When the conversion is complete, we will send you the final data mapping with any conversion notes.

9. Installation and Training

We install your database (this usually takes less than an hour), and do your first training session (another hour).

After Conversion – What to Expect

Your organization probably chose to switch to Sumac because your existing data keeping methods did not meet your needs. When we convert the data, it will reflect the information that you gave us.

1. Redundant or Inconsistent Data

Because Sumac makes it so easy to view and analyze your data, you may suddenly see redundancies or inconsistencies which you had not noticed before.

Sumac has several standard features (searching, bulk editing, etc.) that will enable you to clean these up quickly. We will show you how to clean up your data during training.

2. Duplicate Contacts

If the same name appears in three of the original data files that you sent to us, then your final database may have three records for the same contact. Generally, we do not attempt to remove duplicate contacts during the conversion. If your data may have large numbers of duplicates, let us know during the data mapping process and we can discuss strategies for reducing them.

Sumac has several commands to help you find and remove duplicate contacts after the data conversion is performed. We will show you how to clean up your duplicates during training.

3. Data “Looks” Different

It is likely that, when you get your Sumac database, the data will not be organized in the same way as it was in your old system. Things that you are used to seeing in one place might be stored and organized separately, or the pre-built reports you used to rely on may not exist.

Don't panic! Just remember that you chose Sumac to better manage your data. You are new to Sumac, and there will be a learning curve. Your first training session covers the basics of how Sumac works, and our Sumac gurus are always just a quick email or phone call away. If there's a problem, we'll help you fix it. If you don't know how to do something, we'll show you how.

Tips!

- When you are preparing your data for the mapping, make note of each file you sent, what you named it, and how you produced the data (reports, export settings, etc.). This will help you when you have to re-send your data for conversion.

- Choose a point person who will be Sumac's main contact during the data mapping and conversion process. It's best to have one person who will help keep the project on track and who knows exactly what's going on with the data conversion. That way, everyone will know who to contact with questions, or for updates.
- Make sure your whole team is involved. While it works best for us to work with one person on your team, it's important that everyone on your team reads and understands the data mapping and provides input. If we have questions about volunteer data, but you don't work with volunteers, be sure to ask the right person for the answers. In some cases, it may be necessary for you to put us in touch with the person who can answer our questions.
- Start using Sumac right away! Even if you think there are problems with your data, or if you think you need to know Sumac inside and out before you dive in, start manually entering data that changed or came in during the conversion. Try producing the reports you need right now. Learn to search for the data you need to access frequently. This will help you understand how Sumac works and how your data is organized.
- Always remember that we are here to help! Don't hesitate to contact our support team with any questions. Reach us at +1 416 504 8724 or email support@sumac.com.