

Luminate Online Data Purge Options

To remove inactive records and reduce the housefile size

Data purges help maintain the data integrity of the database and also lower the house file number which is used for determining the cost of the contract with Luminate Online.

- 1. Mark as Inactive (Removed)
 - Records are still intact and searchable in Luminate Online but they don't count toward the house file.
 - How it works
 - Place users in a group and Blackbaud Support will run a job overnight to mark those users as inactive.
 - Considerations
 - Though the records still exist in Luminate with a Removed status, to bring back their record, Blackbaud has to run a job overnight to bring them back (an admin can't bring them back and they can't sign up or donate to activate their record). A report can be run that identifies recent donors who have an inactive status and that can be maintained as a recurring process to bring back inactive users.

Knowledgebase Article: <u>How do I remove or reactivate constituent records?</u> <u>What happens when a constituent is deleted from The Raiser's Edge or removed from Luminate</u> <u>Online when using the RELO integration?</u>

- 2. Deidentification
 - Records first marked as inactive and then deleted from the database.
 - How it works
 - Place users in a group and Blackbaud Support will run a job overnight to mark those users as inactive and then delete those records.
 - Considerations
 - Any information in the user's profile is deleted but if they sign up or donate, they are added right back to the database and then can be immediately contacted for any emails (as long as they opt in to email).

Knowledgebase article: De-identify constituent records



- 3. Email Opt Out
 - Users who are opted into email but are inactive can be marked as opted out.
 Opted out records do not count toward the house file number.
 - How it works
 - The users who are identified can be exported and then imported back into Luminate Online with an opt out flag. A Luminate Online admin can complete this task.
 - Considerations
 - While the user is opted out, their record is completely searchable in Luminate Online. If a user does want to opt back in, they need to be signed in to do that themselves. Blackbaud recommends having conditional code on the donation thank you page that will show to users who have an opt out status and ask them to opt in. Or an admin can opt the user in manually. Blackbaud does not allow for a mass import of opt ins (unless a <u>certain number of criteria is met</u>).