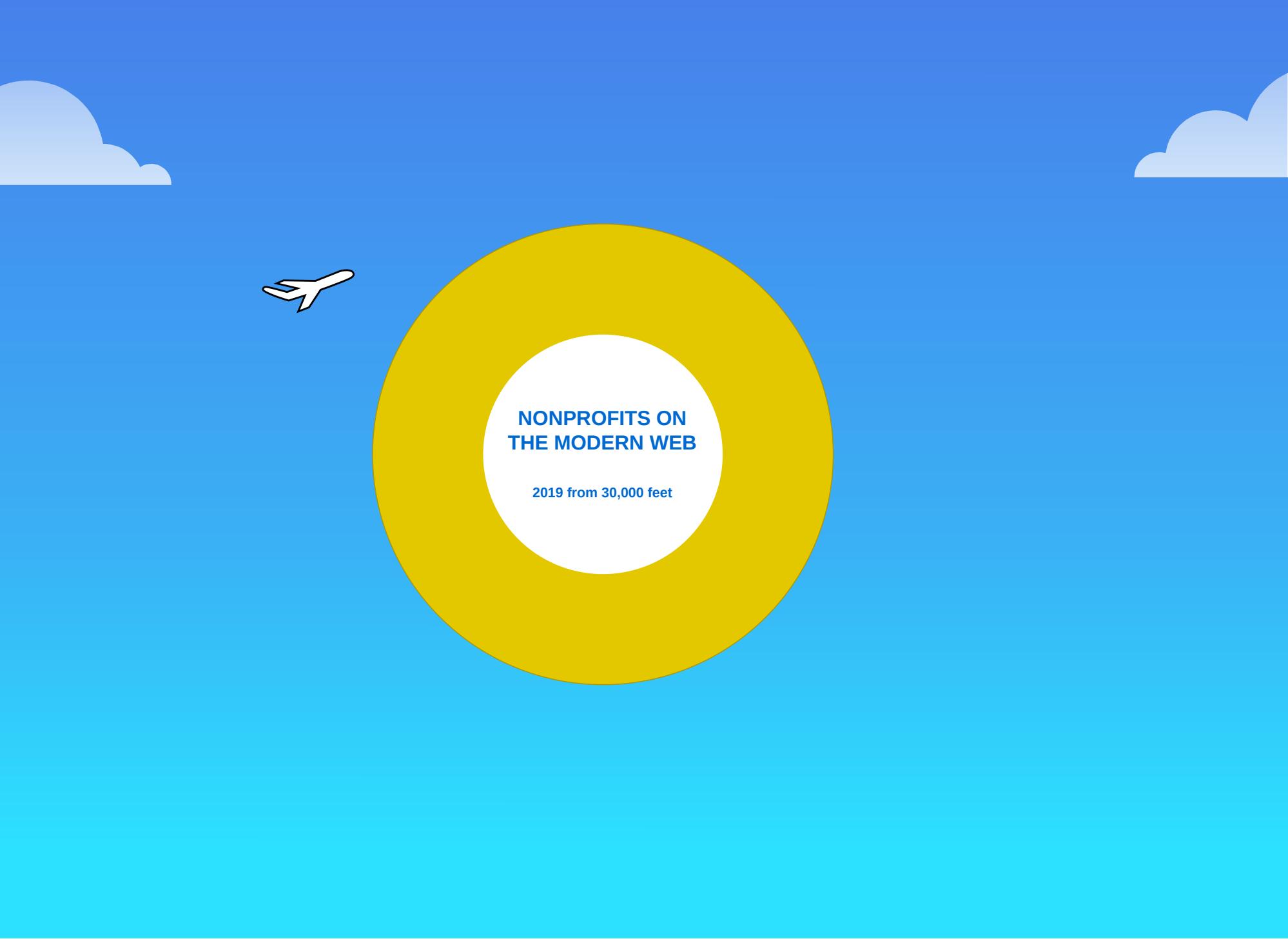


# Bringing Data Together for Nonprofit Websites

Tim Broeker Electric Citizen  
Bryan Lloyd Wilder Foundation

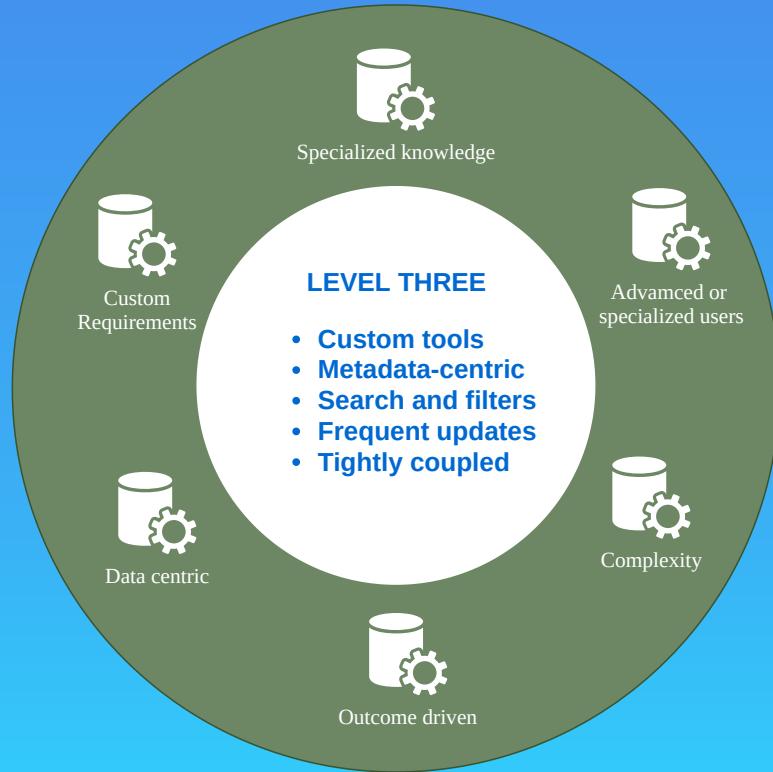


## NONPROFITS ON THE MODERN WEB

2019 from 30,000 feet









## LEVEL FOUR



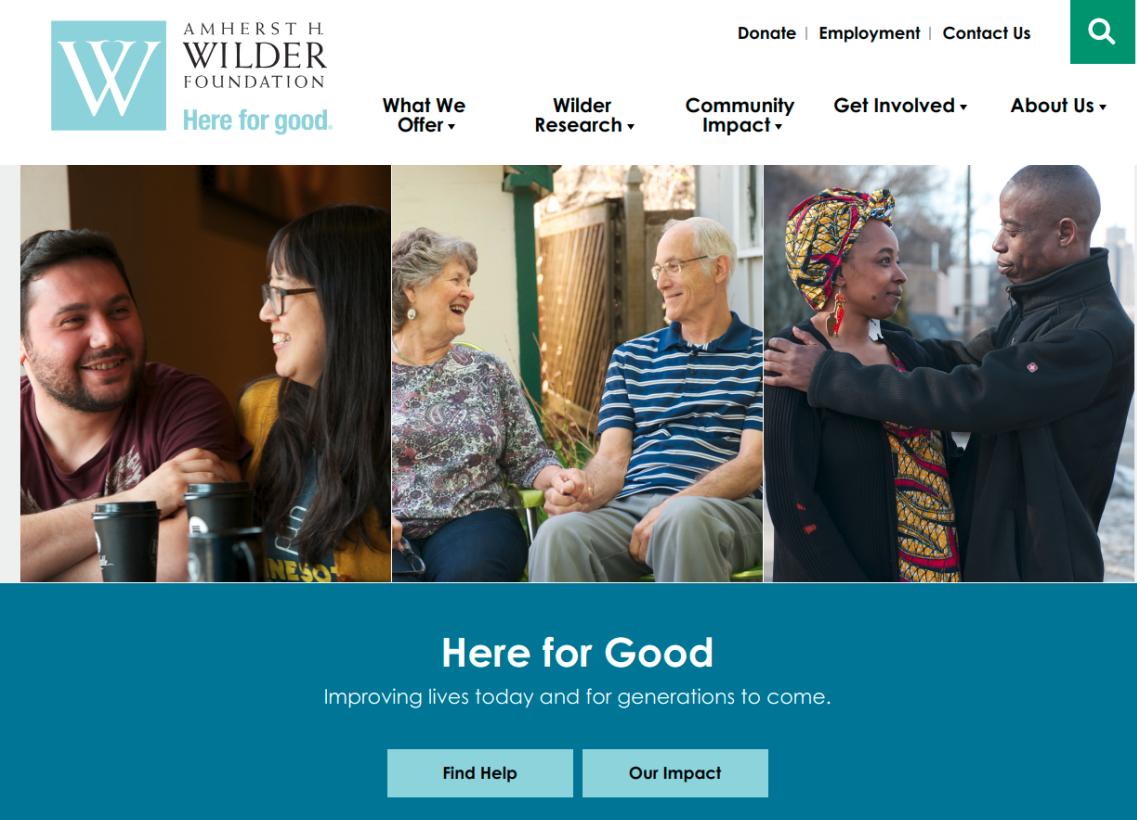
### To infinity...and beyond!

- Third party integrations (e.g. SaaS)
- Legacy integrations (e.g. homegrown apps)
- Public data integrations (e.g. data.gov)
- Any kind of integration!

# Once more unto the breach, dear friends, once more.

resources follow the 'create once, publish anywhere' principle		
<b>Search:</b> Simple, multi-faceted search of site content (pages, events, blog posts, documents, etc.) and Wilder Research's publications library	Promote content as top search result for selected queries; remove content from search results	
Integrate with Wilder Research report library, built with InMagic Presto. Presto is a .NET application hosted on a third-party server. Presto provides an example .NET application for access to Presto data via API. Wilder will assist with connecting the vendor with Presto staff	Wilder Research reports will continue to be maintained in the Presto application	
<b>Embedded content:</b> Rich content (e.g., social media feeds, YouTube videos) added via script or iframe on site pages and within global elements (e.g., sidebars)	Add and remove embedded content from site pages and global elements	
<b>Reusable blocks of content:</b> Small pieces of content (e.g., blog feed, event promotion) that may appear throughout the site	Create, edit, and destroy any blocks of content; add and remove blocks to and from global elements	

# Wilder Foundation



The image shows a screenshot of the Amherst H. Wilder Foundation website. At the top left is the logo 'AMHERST H. WILDER FOUNDATION' with a large stylized 'W' icon and the tagline 'Here for good.' Below the logo are five navigation links: 'What We Offer ▾', 'Wilder Research ▾', 'Community Impact ▾', 'Get Involved ▾', and 'About Us ▾'. To the right of these links are three buttons: 'Donate | Employment | Contact Us', a magnifying glass search icon, and a green square button with a white question mark. Below the navigation is a horizontal banner featuring three photographs: a man and a woman smiling, an elderly couple holding hands, and a Black man adjusting a woman's headwrap. Below the banner is a teal-colored section containing the text 'Here for Good' and 'Improving lives today and for generations to come.', along with two buttons: 'Find Help' and 'Our Impact'.

AMHERST H.  
**WILDER**  
FOUNDATION  
*Here for good.*

What We Offer ▾    Wilder Research ▾    Community Impact ▾    Get Involved ▾    About Us ▾

Donate | Employment | Contact Us

Search



**Here for Good**

Improving lives today and for generations to come.

Find Help    Our Impact



# Wilder Research

- What is Wilder Research and why does it matter?
- How did we manage this data on our old site?
- Why was it a key requirement for us on the new site?

# Why InMagic Presto?



- Internal tool for librarians
- In use since ????
- Effective and powerful
- Lots of internal support and effort



# Lift off!!

How we got from here to there  
and lived to tell about it.

(and how you can do it too)

# Step one: research and analyze

**Export XML from Presto?**  
Posted by Keri Poepple on Dec 28, 2017

Hello Andy and Bryan,

We have a meeting scheduled for next week for the Presto integration. It would be very nice to have data through an XML file. This idea back in October. Would you connect me to know if this is possible? If so, sharing is really awesome!

Thanks!

**GUID eg.:**

<PropertyValue name="ID">

We are assuming this is the GUID and that there will never be duplicate IDs in the data.

**Imported fields:**

<PropertyValue name="ID"> GUID  
<PropertyValue name="Author"> Multiple  
<PropertyValue name="Date"> Pub date  
<PropertyValue name="Pages"> Page count  
<PropertyValue name="Publisher"> Wilder Research  
<Property>

**Contents**

**Chapter 1: Introduction**

- Purpose and Audience
- Related Documents
- Definitions of Terms
- Import Mechanism
- Import Content
- Content Loader
- Connector System / Upload
- File Capture (drag & drop)
- Documentation

**Chapter 2: Configuring Inmagic Presto Services**

- Configuring the Shared Services File
- Configuring Inmagic Presto Services Workers
- Instructions
- PrestoServices Worker Configuration
- Service Type Workers
- ServiceSettings Attributes
- Import Service Configuration (Import Listener)
- <ImportClient> Element for Import
- <ImportService> for Import
- <ImportClient> Attributes
- <ImportClient> Child Elements
- Configuring Multiple Import Listener
- Configuring a Listener for an External Data Source
- Example 1: ImportListener that loads one data file at a time
- Example 2: ImportListener that loads data files in batches
- Export Service Configuration
- ServiceType Workers for Export
- <ServiceSettings> for Export
- <ExportClient>

**Presto discussion 20180124**  
Posted by Keri Poepple on Jan 25, 2018

We discussed the file and questions posted here: <https://basecamp.com/3972949/projects/4851149/uploads/40>

**Question 1: How are studies and reports connected**  
Currently the report stores the Study name. I'm asked that report ID not be the Study name.  
**TASK** Wilder will update one study and then post an updated ID.

**Question 2: All study records have a warning message**  
Wilder confirmed that EC can ignore this warning.

**Question 3: Inconsistent query strings and redirects**  
Wilder noted that there are actually two URLs that we generated with some of the SharePoint URLs for the short URL and the full aspx URL with querying generated with some of the SharePoint URLs for the short URL and the full aspx URL with querying - with a way to automatically generate & before 2013 that do not follow

**Keri Poepple**  
Thank you for following up with me at the study level! - on the study!

**Bryan Lloyd**  
I've just reached out to our Library on this. Considering the holidays I have a file before next Wednesday.

**GUID eg.:**

<PropertyValue name="ID">

We are assuming this is the GUID and that there will never be duplicate IDs in the data.

**Imported fields:**

<PropertyValue name="ID"> GUID  
<PropertyValue name="Author"> Multiple  
<PropertyValue name="Date"> Pub date  
<PropertyValue name="Pages"> Page count  
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- <ExportClient>

- What are the exact goals and requirements?
- Is there an API available? How does it look?
- What about machine-readable export functionality? (XML, CSV, JSON)
- What documentation is available?
- Is it better or possible to just rebuild?
- Ask and re-ask
- Read and re-read

# Step two: design and document



- Select your tools (e.g. Migrate API)
- Data analysis and documentation (external)
- Content model documentation (internal)
- More Documentation!
- Experimentation and validation
- More experimentation and validation!

# Step three: build

The image displays a collage of five screenshots illustrating the 'build' step in a software development process:

- Code Editor:** Shows a file named `client_organization.yml` containing YAML migration definitions. The code includes sections for `source`, `destination`, and `fields`, with specific details like URLs and field mappings.
- Web-based Administration Interface:** A screenshot of a 'Migrations' page from a content management system. It shows a table with one entry: 'wilder' under Migration Group, 'wilder' under Machine Name, and a blank Description field.
- Lucidea Website:** A screenshot of the INMAGIC Presto website, featuring the tagline 'It's About Finding, Not Just Searching'. Below the tagline, it says 'Create a single venue for managing, finding and sharing organizational knowledge resources. Inmagic Presto makes it easy to connect people with the information they need, so they can spend less time searching and more time doing.' It includes 'GET STARTED' and 'GET IN TOUCH' buttons.
- Database Schema View:** A screenshot of a database table or schema editor showing columns for MACHINE NAME, FIELD TYPE, and OPERATIONS. Examples include `field_abstract` (Text (formatted, long)), `field_additional_keywords` (Text (plain)), and `field_authors` (Entity reference).
- Content Management System:** A screenshot of a 'Fields' configuration page within a CMS, showing a list of fields with their types and operations.

- Implement content model
- Implement API client or automated export (external)
- Implement API consumer or automated imports (internal)
- Testing and QA
- More testing and QA!



What We Offer • Wilder Research • Community Impact • Get Involved • About Us •

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Search terms

Criminal Justice  
Early Childhood  
Economy and Workforce  
Education

Homelessness and Housing  
Immigration  
Mental Health  
Substance Use



LUCIDEA Software Solutions • Resources • Technical Support • About Lucidea • Contact Us

## INMAGIC® Presto.

### It's About Finding, Not Just Searching

Create a single venue for managing, finding and sharing organizational knowledge resources. Inmagic Presto makes it easy to connect people with the information they need, so they can spend less time searching and more time doing.

[GET STARTED](#) [GET IN TOUCH](#)

```
<Import>
<ImportSettings ImportFileFormat="Xml" MatchFoundation="Unspecified" MatchNotFoundation="Unspecified" UnrecognizedPropertyOption="Unspecified" ContentDetailExceptionOptions="Unspecified" PersistContentId="False" FileDispositionOption="Unspecified" BinaryFileDispositionOption="Unspecified" SkipRecordCount="0" MaximumRecordCount="Unspecified" UseSchema="False" ConvertNewLine="False" HTMLEncodeValuesGoingInToHTMLFields="False" IsBootstrap="False">
<SyncPath>
<ExceptionFilePath>
<ImportType name="WR_Study" id="10544" locale="en-US"><LocalizableProperty locale="en-US">
<ImportSettings>
<Content type="Study" id="10544" locale="en-US"><LocalizableProperty locale="en-US">
<ImportType name="WR_Studies" id="10543" locale="WR_Project">
<Content type="Project" id="10543" locale="WR_Project">
<Record>
<Properties>
<PropertyValue name="ID" id="ID_10544">403</PropertyValue>
<PropertyValue name="Study name" id="Title_ar_project_10545">Minnesota Cancer Alliance</PropertyValue>
<PropertyValue name="Feature" id="Feature_894d79e09f641409bd411a3c10545">False</PropertyValue>
<PropertyValue name="Queso record" id="Queso_record_a109c7edfd475d63d7a011a6e677">Yes</PropertyValue>
<PropertyValue name="Queso record" id="Queso_record_a109c7edfd475d63d7a011a6e677">Yes</PropertyValue>
<PropertyValue name="Content item" id="Content_item_7333a080e777">True</PropertyValue>
<PropertyValue name="innCratedBy" id="innCratedBy" locale="en-US">HealthierLife</PropertyValue>
<PropertyValue name="innCommunity" id="innCommunity" locale="en-US">Minnesota Cancer Alliance</PropertyValue>
<PropertyValue name="Public document" id="Public_document_396e545420f74327801e1b7331850c7c">Yes</PropertyValue>
<PropertyValue name="Publisher" id="Publisher_a23951086d384ea8b0e5ab96cd4f14">Wilder Research</PropertyValue>
<Record>
<Properties>
<PropertyValue name="ID" id="10544">402</PropertyValue>
<PropertyValue name="Document type" id="Document_type_10545">The Water Main</PropertyValue>
<PropertyValue name="Document type" id="Document_type_10546">WR project</PropertyValue>
<PropertyValue name="Topic" id="Wilder topic_Fed4af73334de0d21d33a0f0d0e">Content items</PropertyValue>
<PropertyValue name="Public document" id="Public_document_396e545420f74327801e1b7331850c7c">Yes</PropertyValue>
<PropertyValue name="Content item" id="Content_item_7333a080e777">True</PropertyValue>
<PropertyValue name="Content item language" id="Content item language_7333a080e777">English</PropertyValue>
```

# Research Library

Information. Insight. Impact.

- 403 research projects
- 1443 reports and PDFs
- 30+ metadata fields
- Complex data model

Search our reports and other publications or browse by topic. Search results are presented by relevance to your search. If you do not find what you are looking for, please [Contact Us](#).

*enter search terms*



## Browse by Topics

[Aging](#)

[Arts and Culture](#)

[Capacity Building](#)

[Children, Youth, and Family](#)

[Communities](#)

[Criminal Justice](#)

[Early Childhood](#)

[Economy and Workforce](#)

[Education](#)

[Health](#)

[Homelessness and Housing](#)

[Immigration](#)

[Mental Health](#)

[Substance Use](#)

[Transportation](#)

- Keyword search
- Advanced filters
- Search API

SEARCH RESULTS FOR: Economy and Workforce

[New Search](#)

[REFINE RESULTS](#)

---

<a href="#">Topics &amp; Subtopics ▾</a>		<a href="#">Project Type ▾</a>	
REPORT TITLE	PROJECT NAME	PUBLICATION DATE	DOCUMENT TYPE
2017 Tour of Manufacturing: Survey of Tour Hosts and Participants	360 Degree Center of Excellence	Mar 2018	report
Evaluation of Twin Cities Youth Social Entrepreneurship Programs: Summary of Sundance Family Foundation Research Cohort	Capacity Building and Evaluation of Twin Cities Youth Social Entrepreneurship Programs	Mar 2018	report summary
Enhancing the Manufacturing Workforce Through Increased Visibility, Education, and Training: Cumulative Findings from a 4-Year Evaluation of 360	360 Degree Center of Excellence	Aug 2017	report
United Way of Steele County Career Center Initiative Evaluation: Year 1 and Year 2 Results	United Way of Steele County Career Center Initiative	Aug 2017	report

# 360 Degree Center of Excellence

## CLIENT ORGANIZATION

Bemidji State University

## PROJECT TYPE

Evaluation

## WILDER TOPIC

Education

STEM

Economy and Workforce

The 360 Advanced Technological Education (ATE) Regional Center works to expose people to and increase enthusiasm for STEM-related careers. The evaluation looked at the impact of a technology and manufacturing summer camp for youth, tours of manufacturing facilities across Minnesota, and other program activities.

## ALL REPORTS IN THE PROJECT

[360 Youth Outreach Events 2017: Survey of Youth Participants](#)

*Apr 2018 | Report |  Download PDF*

[2017 Tour of Manufacturing: Survey of Tour Hosts and Participants](#)

*Mar 2018 | Report |  Download PDF*

[Enhancing the Manufacturing Workforce Through Increased Visibility, Education, and Training: Cumulative Findings from a 4-Year Evaluation of 360](#)

*Aug 2017 | Report |  Download PDF*

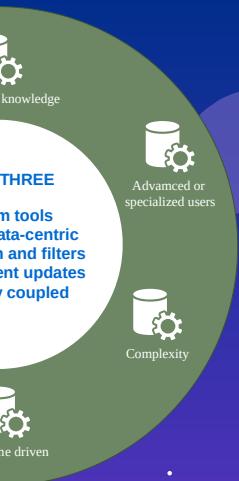
[Learning About Manufacturing and STEM Through Robotics: Adult and Youth Perceptions of the VEX Robotics Program](#)

*May 2016 | Report |  Download PDF*

- Project nodes
- Report nodes
- PDF imports
- Aggregated data

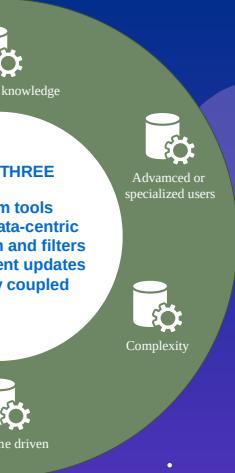
# Pretty cool!

- Powered by Drupal 8
- Fully customizable
- 100% automated
- Seamless user experience



# So Wait. Why not just manage this in the CMS??

- If you can retire an old system, DO SO!
- But this not always possible
- Or even desirable



# So Wait. Why not just manage this in the CMS??

- If you can retire an old system, DO SO!
- But this not always possible
- Or even desirable

# When integration makes sense:

- Right tool for the right job
- Institutional knowledge
- Investment of resources (sunk costs?)
- Institutional limitations (budget, staffing)
- Superior user experience

# Retrospective

## (some lessons learned)

- Changing (and new) technology (Migrate API)
- Unexpected performance problems (real world)
- Unexpected data changes (even over time)
- Larger effort than anticipated on both sides
- Ongoing (but minimal) effort

# Other examples

- Firebrand Title Management (Graywolf Press)
- eJournalPress (CourseSource)
- Code Exchange (Mayo Clinic)
- Staff directories, program directories, citations databases, etc.
- How about you?

# Q & A

Tim Broeker Electric Citizen  
Bryan Lloyd Wilder Foundation



**Thank you!**

