Batch Refresh

This is a function that creates a file of *every* record on NRDS for your association. This includes your primary and secondary members and offices, financial records, secondary records, education record and demographic records if any, and every status is pulled including the inactives. Batch Refresh acts as a full dump of all records on NRDS associated with your association.

Batch Refresh also includes an option that allows you to request an Association file. The association file contains a record for every association - the address, phone, email, AE's name, etc.

A Batch Refresh is not a record of just transactions. It is a 'photograph' at the moment you request the file of every record on NRDS that is part of your association.

A state association can run a Batch Refresh for their entire state, or for just selected local associations.

There are three major uses for a batch refresh file:

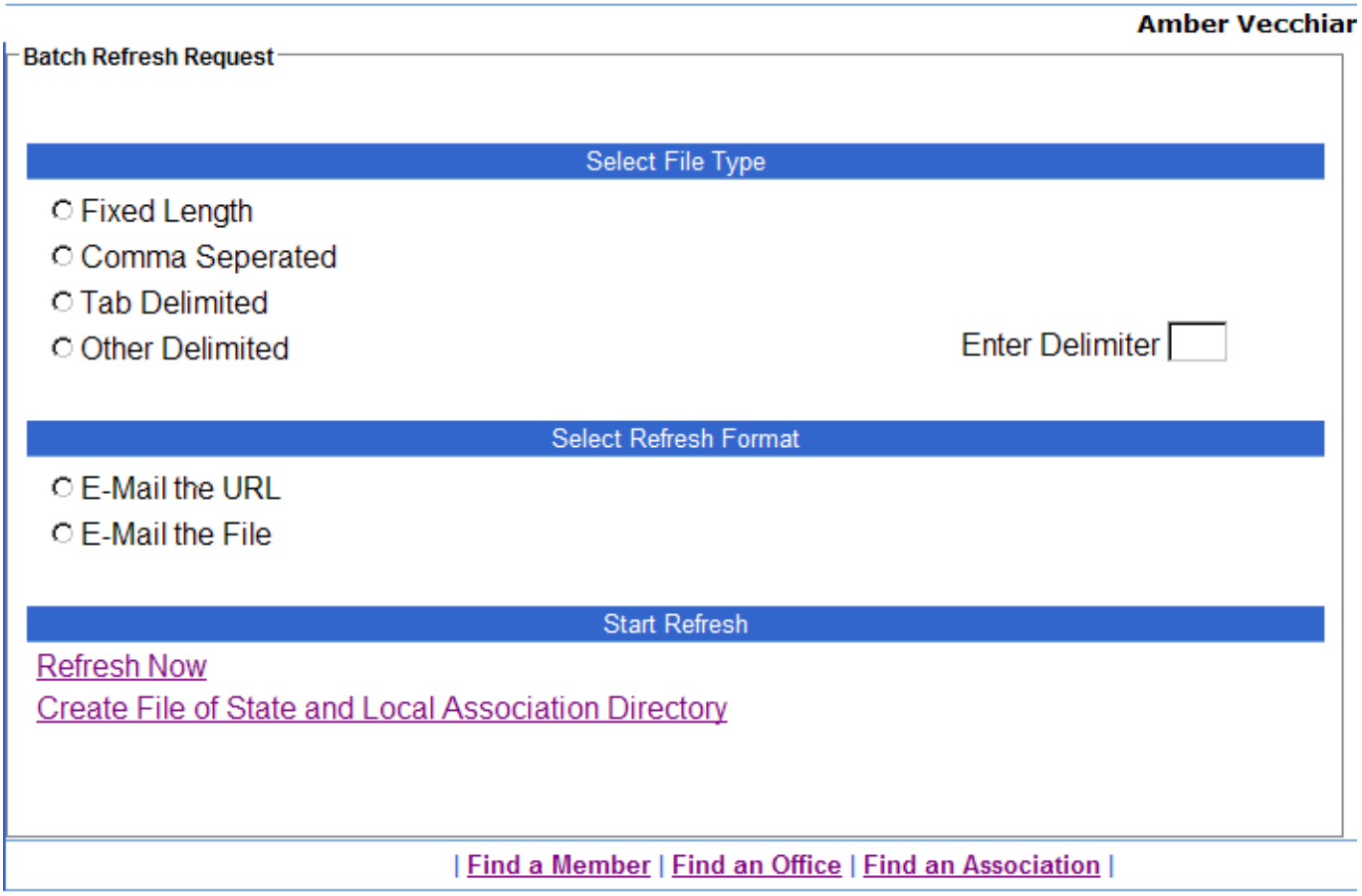
1. If you have a membership system such as Profil's NRDS Manager that you wish to populate with the data from NRDS.

2. You want use the Batch Refresh on occasion (perhaps monthly or quarterly) in order to compare the records on NRDS with the records on your membership system to find any differences. Most vendors' systems have a 'Difference/Compare' utility that will do this comparison for you.

3. A Batch Refresh can be turned into a Batch Upload if you need to make a large number of global changes on NRDS and you cannot generate that type of upload from your own membership system.

Again, remember the Batch Refresh is a full, historical data dump. If there is a member record which was association with your association five years ago, even for just 10 minutes before the primary or secondary record was made inactive, it will still be included in this file.

To use one of these methods, start by selecting Batch Refresh from the main NRDS menu. The following screen will appear:



After selecting Batch Refresh, the following prompts appear:

Select File Type: Your answer will depend on the membership system that you will import this file into. Check with your vendor on which file type their system uses. If you plan to open this file in Excel, select Tab Delimited as the File Type.

Select Refresh Format: once you place your request, NRDS will begin processing the refresh. When the file is complete, NRDS will send an email to the POE's email address. You can have NRDS send the email with a URL link that you would click to go get the file, or with the actual refresh file attached. Which one you select will depend on your email system's ability to handle attachments.

When you have answered the questions, click the Refresh Now link.

When you also need a copy of the Association file (list of state and local associations with their addresses, phone numbers, email, and AE Name) you would follow the steps above but would click the Create File of State and Local Association Directory link instead.

HINT: If you are a State Association, you will see a second screen after you click Refresh Now. A drop down box will list all your local associations. Even though you may not be POE for all the local associations, as a State you can still select a Refresh for any one of them. You can choose the NRDS file for the entire state (select the State name at the top of the list), or you can click on just one local association. Or, if you wish to receive several local associations, hold down the CTRL key while you click on those associations. When you have made your selections, click the Refresh Now link. Please note that if you select several local associations, each one will be created as a separate file.

When NRDS has completed the refresh, it will send you the email. When you receive the Batch Refresh, the file will be in a zipped format. The file name will be the 4 digit association ID and the word FULL. For example, 5050FULL. The extension will start with a z (for a zipped file) followed by two numbers (usually 00 or 01). In the zipped file there may be a file for members (.m), offices (.o) and financial records (.f), etc. If there are no records of a particular type on NRDS (i.e. Demographic records) then that file will be empty.

Using Refresh for Auditing

If you need to review all the records currently on NRDS it can be less time consuming to pull all those records into an Excel spreadsheet rather than try to view them all online. You can do this by requesting a Batch Refresh.

If you are going to import the file into Excel, select the File Type of Tab Delimited when you request the Batch Refresh.

When you receive the file, save it to your PC. The Refresh file will be zipped (compressed) so you do not spend hours downloading it from NRDS. A Refresh file name will always be the association ID followed by the word FULL. For example, 5050FULL. The extension will start with a z followed by two numbers. (e.g. 5050FULL.z00).

You will need to first unzip the file. You will then see a .o (offices), a .m (members), a .p (office secondary), a .n (member secondary) a .f (financials), .e (education) and .d (demographic) for those type of records on NRDS.

You can open any one of these in Excel. Once you have opened the file as a spreadsheet, every row will be a record and every column will be a NRDS field.

The columns will be in order of the NRDS File Layouts. For example, in the NRDS Member File Layout, the 40th field is Join Date so the 40th column in the spreadsheet will be Join Date. Be sure to refer to the File Layout for the type of record you are reviewing to determine which fields are in which columns.

You can then use the spreadsheet capabilities to sort and select these records how you choose so you can use this to compare against other reports. Remember, the Refresh includes every record from NRDS. You may want to sort and select in your spreadsheet on columns such as Status, Member Type, and Primary Association to eliminate all the members except Active, REALTORS®, Primary with your association.

NOTE: Check with your vendor to see if your membership system has a 'comparison' program. Those type of programs will take a batch refresh and automatically compare it to the data in your own system for any differences.

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