# My BackPack Profile Changes for Alumni/Development and Student/Parent Applications

# **My Backpack Profile Feature**

Significant changes have been made to the way profile changes are approved for registered **My Backpack** users. Please read this walk-through before approving any profile changes.

#### Composing a Note

Users of **Student/Parent Addresses** and **Alumni Development** can now compose a note to the school by clicking **Enter a note to the school** on the upper right corner of **View/Manage My Profile** window.

View / Manage My Profile							
lange Biography		Enter a note to the school					
Mr. James Smith - "Jim" Class Of: 1985 Gender: Male Available Add Photo	Spouse/Partner Info Name: Mrs. Susan Brown Class Of: Gender: Female Home Page: Add Photo						

Figure 1. A new button in the upper right hand corner allows the user to send a note to the school.

The Add Note window appears allowing you to compose a note back to the school.

Add Note Back to Profile							
If you need help making any profile changes, enter a note. The sch Note:	ool will read your note and make the necessary changes to your profile accordingly.						
I wanted to change my spouse's name as she never goes by Susan, even though that is her legal name. I put her preferred names, either Olivia or Liv in the middle and nickname lines, but we would really like to remove any references to Susan if possible. It doesn't seem to allow me to change our first or last names. Thanks, Jim							
₩ <u></u>							

Figure 2. Composing a Note to the School

This note then appears in the profile approval window.

#### **Editing Biographic Information**

Users can no longer indicate a divorce by editing their own biography, nor can they alter their first or last name or that of their spouse. This ability was removed to avoid the confusion caused when a user had changed his/her spouse's name.

In this scenario, Mr. James Smith has logged on to edit his profile. After adding some name information for both himself and his spouse, he also changes his address. Up until this point in the school's part of the process, nothing has changed.

Spouse/Partner Information: Title: Mrs.
* Elect Name
* First Name: Susan
Middle Name:
* Last Name: Brown
Maiden Name:
Suffix:
Nickname:
Relation:
Date Of Birth:

**Figure 3. Editing Biographic Information** 

After he submits his changes, we can review them by clicking on **My Backpack** in both **Student/Parent Addresses** and **Alumni/Development**.

Approve Profile Changes Sort Options Sort By Name	Sort Order	scending	O Descending		
Name	Family I.D.	Date Changed		Changes	
Mr. and Mrs. Jim Smith	0026470	08-09-2008		al, Changed Address	
	·		:	<u>R</u> eview	Dejete
					NUM

**Figure 4. Approving Profile Changes** 

Changes can still be reviewed by double-clicking the desired row or selecting the row and clicking **Review**.

	Tools Help	am Smith )	_								_ 🗆
	Edit 🗎 Copy 🏹	Deactivate	≽ Print 📑 Mail (	运 Close							
Display 0 🔽 Activ				ily Options ly I.D. 0026470	Pare	ent <u>W</u> eb	Accou	unts			
EC	Name		Code	Address Type	Statement	Active	AR	RG	AL	AD	Visit
Mr. ar	nd Mrs. Jim Smith		🎒 Parent 1		Original	~		~	~	~	~
				I	I			1	I	I	
Profile A	Approval										
Change	es submitted by: Mr. and										
	Mr. Jam	es Smith									
⊟…H	Mr. Jam	es Smith									-
	ome Addresses		rs. Jim Smith			Revi	ew	Acce	: <u>pt</u>	Reject	
	ome Addresses Change Middle Name	Mr. and Mr. added 'Bol				<u>Revi</u>	ew	Acce	: <u>pt</u>	Reject	_
	ome Addresses Change Middle Name Suffix	Mr. and Mr added 'Bol added 'III'	b'			<u>Revi</u>	<u>ew</u>	Acce	<u>:pt</u>	Reject	
	ome Addresses Change Middle Name	Mr. and Mr added 'Bol added 'III' added 'III'	b' her'			<u>Revi</u>	ew	Acce	: <u>pt</u>	Reject	
	ome Addresses Change Middle Name Suffix Relation	Mr. and Mr added 'Bol added 'III' added 'III'	b' her' rom 'Susan' to 'Liv'			Revi	ew	Acce	:pt	Reject	
	ome Addresses Change Middle Name Suffix Relation Preferred Name	Mr. and Mr added 'Bol added 'III' added 'Fat changed fi	b' her' rom 'Susan' to 'Liv' via'			Revi	ew	Acce	ept	Reject	
	ome Addresses Change Suffix Relation Preferred Name Middle Name	Mr. and Mr added 'Bol added 'III' added 'Fat changed fr added 'Oliv	b' her' rom 'Susan' to 'Liv' via'			Revi	ew	Acce	:pt	Reject	

Figure 5. Student/Parent version of the new Profile Approval window

The **Profile Approval** window opens within the **Address Maintenance** screen for this parent in **Student/Parent Addresses** and can be moved around the desktop and resized to fit your needs.

Prospects Giv. Summary Name Salutations	Giv. Detail Track		stom	Comments Solicitor	Web ID Mailings
Constituent		- Spouse			-
D. 23074	Assign	I.D. 23075 Ass	sign		
itle Mr. 💌		Title Mrs.			
	Dest Li		D(	<b>I</b> 0	<u></u>
rst James	Pref. Jim	First Susan	Frer.	Susan	
iddle		Middle			
ast Smith	Suffix 🗨	Last Brown	Suffix		-
laiden	Gender M 👻	Maiden	Gend		7
ofile Approval					
⊡…Mr. James Smith	nes Smith				
⊡…Mr. James Smith ⊑			Paulau	Accept All	Reject All
⊡…Mr. James Smith ⊡…Biographical —…Middle Name	added 'Bob'		<u>Review</u> Beview	Accept	Reject
⊡…Mr. James Smith ⊡…Biographical Middle Name Suffix	added 'Bob' added 'III'		Review	<u>Accept</u> <u>Accept</u>	<u>Reject</u> <u>Reject</u>
⊡…Mr. James Smith ⊡…Biographical Middle Name Suffix Suffix Birth Date	added 'Bob' added 'III' added 04-23-1968		<u>Review</u> Review	Accept Accept Accept	<u>Reject</u> <u>Reject</u> <u>Reject</u>
⊡…Mr. James Smith ⊡…Biographical Middle Name Suffix	added 'Bob' added 'III'		Review	<u>Accept</u> <u>Accept</u>	<u>Reject</u> <u>Reject</u>
BMr. James Smith BBiographical Middle Name Suffix Suffix Birth Date Homepage	added 'Bob' added 'III' added 04-23-1968 added 'www.senior-systems.com'	me as she never goes by Susan, even thc	<u>Review</u> <u>Review</u> <u>Review</u>	Accept Accept Accept	<u>Reject</u> <u>Reject</u> <u>Reject</u>
Mr. James Smith     Biographical     Middle Name     Suffix     Birth Date     Homepage     Homepage     Note     Note	added 'Bob' added 'III' added 04-23-1968 added 'www.senior-systems.com'	me as she never goes by Susan, even thc	<u>Review</u> <u>Review</u> <u>Review</u>	Accept Accept Accept Accept	<u>Reject</u> <u>Reject</u> <u>Reject</u>
Mr. James Smith     Biographical     Middle Name     Suffix     Birth Date     Homepage     Homepage     Note     Note	added 'Bob' added 'III' added 04-23-1968 added 'www.senior-systems.com'	me as she never goes by Susan, even thc	<u>Review</u> <u>Review</u> <u>Review</u>	Accept Accept Accept Accept	<u>Reject</u> <u>Reject</u> <u>Reject</u>
Mr. James Smith     Biographical     Middle Name     Suffix     Birth Date     Monepage     Note     Note     Note     Mrs. Susan Brown	added 'Bob' added 'III' added 04-23-1968 added 'www.senior-systems.com'	me as she never goes by Susan, even thc	<u>Review</u> <u>Review</u> <u>Review</u>	Accept Accept Accept Accept Accept	<u>Reject</u> <u>Reject</u> <u>Reject</u>
Mr. James Smith     Biographical     Middle Name     Suffix     Birth Date     Homepage     Note     Note     Note     Mrs. Susan Brown     Biographical	added 'Bob' added 'III' added 04-23-1968 added 'www.senior-systems.com' I wanted to change my spouse's nar	me as she never goes by Susan, even thc	<u>Review</u> <u>Review</u> <u>Review</u>	Accept Accept Accept Accept Accept Accept	Reject Reject Reject Reject Reject All
Mr. James Smith     Biographical    Middle Name    Suffix    Birth Date    Birth Date    Note    Note    Note    Note    Note    Note    Miss Susan Brown    Preferred Name    Middle Name    Middle Name    Middle Name    Middle Name    Middle Name    Middle Name	added 'Bob' added 'III' added 04-23-1968 added 'www.senior-systems.com' I wanted to change my spouse's nar changed from 'Susan' to 'Liv' added 'Dlivia' added 'Simpson'	ne as she never goes by Susan, even thc	Review Review Review Review	Accept Accept Accept Accept Accept Accept All Accept	Reject Reject Reject Reject Reject Reject Reject Reject
	added 'Bob' added 'III' added 04-23-1968 added 'www.senior-systems.com' I wanted to change my spouse's nar changed from 'Susan' to 'Liv' added 'Olivia'	me as she never goes by Susan, even thc	Review Review Review Review Review Review	Accept Accept Accept Accept Accept Accept Accept Accept Accept	Reject Reject Reject Reject Reject All Reject Reject

Figure 6. Alumni/Development version of new Profile Approval window.

Within the **Constituent Maintenan**ce screen in Alumni/Development, you can now view the current address/constituent record before approving or rejecting changes. Each change is listed in a separate row, categorized by the type of change and can be expanded or collapsed using the box beside the text

Profile Approval							
Changes submitted by: Mr. James Smit	'n						
□							
i Biographical ⊕…Main Addresses ⊕…Note	Accept All	Reject All					
⊡…Mrs. Susan Brown ⊞…Biographical	Accept All	Reject All					
	<u> </u>	Done					

Figure 7. Profile Approval window with rows collapsed

In this example, the **Alumni/Development** user is the first to notice the profile change. Clicking the <u>Review</u> link next to the Middle Name that was added brings up the **Name** tab for Mr. James Smith.

Profile Approval								
<b>^</b>								
Reject All								
Reject								
Reject								
Reject								
Reject								
-								
•								
Done								

Figure 8. Profile Approval window

Here, we can view the original values for each field on the tab. Clicking on the <u>Accept</u> link will overwrite any fields that have changed with the values Jim submitted.

🛱 Constituent Maintenance - (N	4r. and Mrs. Ja	mes and Susar	n Smith)					_	
Constituent	Giv. Detail   Address   ssign	Track Info A	Even ttributes	Relation	Media   Activity	Custom Educatio	Comments on Solicit		
Title Mr.  First James Middle Bob Last Smith Maiden	Pref. J	III <u>-</u>	La	st Susan		F	Pref. <mark>Susan</mark> iuffix iender F		
	,		Add Delete	Cor Alumni Spo ass Yr	istituency use Admiss Yr	Pri Fro	om To Grad	Add Delete	
Mr. James Smith - Biographical - Main Addresses - Note - Mrs. Susan Brown - Biographical - Preferred Name - Middle Name	changed froi added 'Olivia	m 'Susan' to 'Liv'				Review Review		Reject All Reject All Reject Reject	Gend
							<u>P</u> rint	Done	

#### Figure 9. Profile Approval window

So far we are comfortable with all of the changes, but when we click <u>Accept</u> on the Notes row, we see that Jim in unclear how to change his spouse's first name. This is because he is not allowed to do so.

Notes
I wanted to change my spouse's name as she never goes by Susan, even though that is her legal name. I put her preferred names, either Olivia or Liv in the middle and nickname lines, but we would really like to remove any references to Susan if possible. It doesn't seem to allow me to change our first or last names. Thanks, Jim

Figure 10. Notes window

We can change Susan's name by navigating back to the **Name** tab and overwriting the changes we had just accepted moments ago.

Spouse		
I.D. Title	23075 Assign	
Title	Mrs.	
First	Susan	Pref. Liv
Middle	Olivia	
Last	Brown	Suffix 🗨
Maiden	Simpson	Gender F

Figure 11. Changing the Name tab

- Spouse I.D.	23075- Assign	
Title	Mrs.	
First	Olivia	Pref. Liv
Middle		
Last	Brown	Suffix 🗨
Maiden	Simpson	Gender F

Figure 12. Overwriting Changes in the Name tab

As for the address changes, by comparing the original address to what Jim submitted, it seems he's just trying to fill in some blanks and correct a few mistakes we had. We can click <u>Accept</u> to approve his changes.

Constituent Maintenance - (Mr.	and Mrs. James and Susan Smith)	
	Giv. Detail Track Events Media Custom C dress Info Attributes Relation Activity Education	Comments Web ID   Solicitor Mailings
Name Mr. & Mrs. James Smith	Code Address Type Active In Use Primary Comments	0026470 Edit Deactivate Copy
Address Main Sr Springfield, MA 01752 Comments Profile Approval Changes submitted by: Mr. James S	Telephone Numbers Tel No: 555-555-1212 Fax No:  Misc Primary Send Mail  Misc Smith	Print
← Main Addresses     ← Change     ← Address Line 1     ← Zip     ← Phone     ← Other Number Type 1     ← Other Number 1		ccept Reject Gender
	<u></u> P	rint Done

Figure 13. Profile Approval window

**Development** is now complete with its review of Jim's changes. By clicking on **Done**, the profile window is dismissed.

ı Mailing Ad	eneral Attributes Comments Idress		🕞 🗖 Telephone Number:	s	
Name	Mr. & Mrs. James B. Smith, III	1			DNP
			Tel. No.	555-555-5555	
ine 1	1 Main Street		Fax No.		
ine 2			*Cell Phone 💌	555-555-1212	
ine 3					
City/St/Zip	Springfield MA 💌 01103				
Country	Region V				
Sort Key	SMITH, JAMES B.		E-Mails		
Reporting			James		DNP
City/Town	Springfield		Jimsmith@senior-sy	stems.com	
			🔽 Send House		a.1
			Olivia	Swap E-Ma	
			Send House	hold E-Mails	
	Publish this Address record 🦳 Do Not Display in My	Pool/Pool/			
DUNUU	-ublish this Address record 1 Do Not Display in My	DAUKFAUK	•		

Figure 14. Address Maintenance window

Click **OK** to save the constituent record.

However, if Jim were to log in now, he would see that the approval is still not complete. **Student/Parent** still needs to give its approval for certain fields.

Constituent Maintenance - (I	Mr. and Mrs. Ja	mes and Su	san Smith	)						
Prospects Giv. Summary	Giv. Detail	Track	E	vents	Media	Custo	m	Comments	W	eb ID
Name Salutations	Address	Info	Attributes	Relation	Activ	∕ity Ì Eo	ducation	Solicitor	M I	lailings
Display Options Active Only										
Name		Code		Address Type	Active In l	Jse Primary	Comments	Family I.D.		<u>N</u> ew
r. & Mrs. James B. Smith, III	<b>a</b>	Constituent	Main		< <	/ /		0026470		<u>E</u> dit
							•		De	eactivate
										Сору
							•			Print
Main Street pringfield, MA 01103	Fax No:	555-555-5555 555-555-1212		James: Olivia: Since Primary Se		h@senior-sy	<u>stems.com</u>			
S Comments				Industry						
			A V	Occupation						
larital Status 📃 💌							₽K	<u>C</u> ancel		<u>P</u> rint

Figure 15. Constituent Maintenance window

	View / Manage My Profile		
	The school is reviewing your profile change request. In the meantime, you cannot make further changes.		
l	lage Biography	Β	

Figure 16. What Jim sees when he logs in while the approval is still in process

When **Student/Parent** reviews the profile change, we don't see any address change information because Jim's address is linked between the applications and approval of an address change by one department applies to all departments. However, since other biographical data is stored separately, both **Alumni/Development** and **Student/Parent Addresses** must approve these changes (and can make different decisions about the data if they so choose).

In **Student/Parent Addresses**, Jim's **Birthdate** or **Homepage** is not visible, but we do see **Middle Name**, **Preferred Name**, **Suffix**, and **Relation** to the Student. We also see the note he submitted.

Profile Approval				
Changes submitted by: Mr. and Mrs Mr. James B				
- Change	Mr. and Mrs. Jim Smith	<u>Review</u>	<u>Accept</u>	<u>Reject</u>
Middle Name	added 'Bob'			
Suffix	added 'III'			
Relation	added 'Father'			
Preferred Name	changed from 'Susan' to 'Liv'			
Middle Name	added 'Olivia'			
Relation	added 'Mother'			
□□··Notes				
Note	I wanted to change my spouse's name as she never goes by Susan, e	<u>Review</u>	Accept	
			<u>P</u> rint	Done

Figure 17. Profile Approval window

By clicking <u>Accept</u>, we see what has been changed by Jim, not by **Alumni/Development**.

Add	ress Mainte	enance - ( Mr. and Mrs. Jim Smith )		×
Pa	arent/Guardia	n Address General Comments		
Г	-Father / Na	me 1	– Mother / N	ame 2
	Title	Mr.	Title	Mrs.
	First	James	First	Susan
	Middle	Bob	Middle	Olivia
	Last	Smith	Last	Brown
	Suffix		Suffix	
	Preferred	Jim	Preferred	Liv
	Relation	Father	Relation	Mother
	SSN		SSN	
L	Web I.D.	JSMITH01		
[	-Full Name-			
	Mr. and M	frs. Jim Smith, III		Custody
l				
Pa	rent 1			<u>D</u> K <u>Cancel</u> Dejete

Figure 18. Address Maintenance window

Names have been changed, yet the address fields appear to be unchanged because **Alumni/Development** has already approved the address changes and there is no opportunity for these fields to be different between applications since the address record is shared.

Address Maintenance - ( Mr. and Mrs. Jim Smith )
Parent/Guardian       Address       General       Comments         Mailing Address       Image: Comments       Image: Comments       Image: Comments         Name       Mr. and Mrs. Jim Smith, III       Image: Comments       Image: Comments       Image: Comments         Line 1       1 Main Street       Image: Comments       Image: Comments       Image: Comments       Image: Comments         Line 2       Image: Comments       <
Bill Codes       Image: Send Grades         A/R       Original       Image: Send Grades         Image: Send Grades       Image: Send Grades         Image: Send G

We should remember, because of Jim's note, to change the name information for Liv, but if school policy dictates that the **Registrar** and **Business Offices** require the parents' legal names to be on file, we can keep the record as it stands and just make sure to adjust Jim and Liv's salutations appropriately. (Remember that **Student/Parent Addresses** and **Alumni/Development** store separate name and salutation fields even when the parent record is linked to a constituent record via the address record.)

Finish the approval by clicking **Done**.

Profile Approval		
Changes submitted by:	Mr. and Mrs. Jim Smith Mr. James B. Smith, III	
. Home Addresse	\$	
E⊷Notes		
		Print Done

Figure 19. Profile Approval window

This profile approval is now complete and Jim can begin to make more changes if he likes. If Jim and Liv were to move, we would follow the same steps as before, unless we wanted to archive a copy of their old address. Generally this is an **Alumni/Development** practice, not typical for schools only using **Student/Parent** applications.

Before approving an address change, to keep a copy of the original address, we can simply click **Copy** on the **Address** tab. We are still going to change the original address, but by making a copy, we not only preserve the linking of the original address to the **Student/Parent** address, but also have an **Alumni/Development**-only copy in case we ever lose touch with the family after graduation.

😇 Constituent Maintenance - (Mr. and M	s. James and Olivia	Smith)				
Prospects Giv. Summary Giv. De	ail Track	Events	Media	Custom	Comments	Web ID
Name Salutations Address	Info At	tributes Rela	tion A	ctivity Educati	ion Solicitor	Mailings
Display Options						
Active Only						
Name	Code	Address T	pe Active I	In Use Primary Com	ments Family I.D.	<u>N</u> ew
Mr. & Mrs. James B. Smith, III	🎒 Constituent M	ain	<ul> <li></li> </ul>	< <	0026470	<u>E</u> dit
						Deactivate
						Сору
						Print R
Address []	ephone Numbers		i i lielu	1 1	I	<u> </u>
1 Main Street Tel No:	•	James:		mith@senior-systems	.com	
Springfield, MA 01103 Fax No		Olivia:				
Cell Pr	one: 555-555-1212	- 📎 Mi Primari	sc Send Mail			
			Schaman			
Comments						
Profile Approval	_	Ш				
Changes submitted by: Mr. James B. Smith						[] []
Changes submitted by. Int. Banes b. Smith						
- ⊡…Mr. James B. Smith, III						
H ⊡… Main Addresses	Ars. James B. Smith. III			Review	Accept R	eiect
Address Line 1 changed from '1 Main Street' to '100 South Street'						
State changed from 'MA' to 'IL'						Gend
Zip changed from '01103' to '62701'						Home
Length Changed from '555-555' to '627-555-5555'						
					Print	Done
					<u> </u>	

Figure 20. Profile Approval window

After clicking **Copy**, we are prompted to pick an **Address Code** to use when storing the new copy. "Other" is generally used for this purpose, though "Constituent Main" is valid.

Copy an Address	×
New Address Code	ОК
Constituent Main	Cancel
Other	

Figure 21. Copy an Address window

After selecting the **Address Code** and clicking **OK**, the copy is created, and we can then approve the changes to the original address just as we did in the earlier example.

	ntenance - ( Mr. & Mrs. James B. Smith, III )				×
Address G	eneral Attributes Comments				
☐ Mailing Ac			Telephone Numbers	8	
Name	Mr. & Mrs. James B. Smith, III	- DNP1	Tel. No.	627-555-5555	
Line 1	100 South Street			027-000-0000	
			Fax No.	FFF FFF 1010	
Line 2			Cell Phone	555-555-1212	
Line 3					
City/St/Zip	Springfield IL Science 62701				
Country	Region 💌	Г	<b>_</b>		
Sort Key	SMITH, JAMES BOB		E-Mails		
Reporting	Springfield		James		
City/Town			Jimsmith@senior-sy		
			Send House	noid E-Mails Swap E-Mails -	
			Olivia		
			Send House	hold E-Mails	
🔽 Do Not	Publish this Address record 🦵 Do Not Display in My F	BackPack			
Constituent I	Main Do Not Publish flags are used to deterr corresponding field's data in Reports, N			<u>O</u> K <u>C</u> ancel	Dejete

Figure 22. Address Maintenance window

It's important to remember that since address changes only need to be approved by one department, if one department wants to keep a copy of the old address, they need to <u>make this</u> <u>copy before the other office approves the change</u>. One easy way of making sure this happens is to make sure you send the biography change notifications to the right user.

In the **System Administration** application, under **My Backpack > Preferences**, you can set the email address to use when notifying users of profile changes. You can notify multiple users, or you can notify one user, who then can pass on the email after he/she has processed it. Any user with access to **Approve Profile Changes** will be able to check if there are any recent profile changes, but alerting one user via email may help maintain a processing order.

4	5y_fre	m Preferences		×
	Арр	Description	Value	-
	SU	List of Change of Biography Emails (separated by ;)	DevelopmentUser@senior-systems.com	

Figure 23. System Administration > My Backpack > Preferences

In our final example, Jim has added his work address, and this time, it's **Student/Parent** that notices the change first. The process for approving the addition of an address is similar to the previous steps.

To approve the addition of the address, we click <u>Accept</u>, which will launch the **Address Code** selection screen. We select the proper address code, and search the constituent addresses by clicking **Search Constituents** to see if **Alumni/Development** already has a work address on record.

ork Addresses		
Add	Parent 1 Father Work	
Company	Senior Systems, Inc.	
DNP Company	Unchecked	
Address Line 1	201 Boston Post Rd	
Address Line 2	Suite 300	
DNP Address	Unchecked	
City	Marlborough	
State	MA	
Zip	01752	
DNP City/State/Zip	Unchecked New Address	
-DNP Country	Unchecked	
Send E-Mail	Checked OK	
-Send E-Mail 2	Checked Parent 1 Father Work	
DNP Phone	Unchecked Search Constituents Cancel	
DNP Fax	Unchecked	
-DNP Other Number 1	Unchecked	
-DNP Other Number 2	Unchecked	
DNP Other Number 3	Unchecked	
-DNP Other Number 4	Unchecked	
	Unchecked	
	Unchecked	
Send Grades	Unchecked	

Figure 24. New Address window

If they do, we'll have to decide if the change Jim has made is superficial and we can safely approve the change, or if we should let the **Alumni/Development** office process this profile change first, so they can decide what to do with the address they already have.

Mailing Ad	dress	DNP1	Telephone Numbers
Co. Name	Senior Systems		Tel. No.
line 1	201 Boston Post Rd W		Fax No.
line 2	Suite 201		
Line 3			
City/St/Zip	Marlborough MA 💌		
Country	Region V		
Addressee	Mr. James Bob Smith, III		E-Mails
Reporting City/Town	Marlborough		Work E-Mail 1
Parent Company			Send Household E-Mails Swap E-Mails
Bill Codes-	Send Grades		Work E-Mail 2
A/R	🔄 🔄 🗖 Send Grades (Summer School)	)	
Loans	🗾 🗖 Attend Visit		Send Household E-Mails
Do Not F	Publish this Address record 🔲 Do Not Display in My B	ackPack	

Figure 25. Address Maintenance window

Since this is a work address, once we decide to add it, we need to associate a valid company name. Most likely, we will have to add this company to the company list. Clicking on Search from the **Address Maintenance** window opens **Company Maintenance**, where we can click **New** to add Jim's company to the company list. It's not necessary to add the company's address to the main company record, however the program will prompt you with the following message:

Address Maintenance						
?	The address and/or telephone numbers f replace the address information with the	Would you like to				
		<u>Yes</u> <u>No</u> Cancel				

Figure 26. Address Maintenance window

The answer to this question is generally **No**, since clicking **Yes** overwrites Jim's address information with that of the company, which is oftentimes blank.

The approval of Jim's work address is now complete for the **Student/Parent** application. **Alumni/Development** must now simply decide if it wants to approve the addition of this address. Clicking <u>Accept</u> on the **Profile Approval** window will launch the **Address Maintenance** screen for editing, but if there are no further changes for **Alumni/Development** to make at this time, they can click **OK**, and the new work address will be added and linked to the address previously approved by the **Student/Parent** application.

There are no system requirements for which office approves profile changes first. Many biography changes pertain only to one application, and cannot be approved by a department that does not have the ability to see these changes. Name changes, as well as additions of new addresses, need approval by both an **Alumni/Development** user as well as a **Student/Parent** user. Edits to addresses only need approval by an **Alumni/Development** user or a **Student/Parent** user. This new interface should provide enough flexibility to accommodate various policy decisions regarding the approval of online profile changes while upholding the existing functionality available within the client-based applications.

Address Maintenance - ( )	×								
Address General Occupation Attributes Comments									
Mailing Address     DNP     Telephone Numbers       Co. Name     Senior Systems, Inc.	-DNP-								
Line 1 201 Boston Post Rd									
Line 2 Suite 300									
City/St/Zip Marlborough MA  01752 Country Region									
Addressee Mr. James Bob Smith, III									
Parent     Image: Send Household E-Mails       Company     Swap E-Mails									
Work E-Mail 2									
Send Household E-Mails      Do Not Publish this Address record Do Not Display in My BackPack									
Constituent Work         Do Not Publish flags are used to determine whether to publish the corresponding field's data in Reports, Mail Merge and Export data files.         DK         Cancel         Dejete									

Figure 27. Address Maintenance window