


SeniorSystems

Senior Alumni/Development System Release Bulletin

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We are very excited to present you with the latest enhancements to the **SENIOR ALUMNI/DEVELOPMENT SYSTEM**.

Relations Tab

The Relations tab in Constituent Maintenance has been enhanced to show more information about each of the constituent's relations.

For more information, turn to page 12 of this release bulletin.

Gift/Pledge Import

The February 2006 release (90_0) of ALUMNI/DEVELOPMENT includes the new **Import** functions, which allow you to import gifts and pledges with user-defined import formats.

This feature has robust import capabilities for TXT, CSV, and other fixed length files, as well as the ability to import transactions from spreadsheets and XML files.

Import List

Gift and pledge imports are done as a "batch." This allows you to import related files. You can also begin to import files and then save your work to return to at your convenience.

The Gift and Pledge Import Lists allows you to create a new batch or add to an existing batch of imported gifts or pledges. You can also edit information to ensure the quality of the data in the import before creating the Gift/Pledge Posting batch.

Please refer to page 3 of this bulletin for more about the Import List.

Import Defaults

When you are preparing to import a batch of gifts or pledges, you can establish default values for fields. You will also select the import file and map in the Gift Import dialog.

Please refer to page 4 for details.

User-Defined Import

This new import feature does not require a fixed file layout. Instead, it allows you to map the fields in the file you are importing to the fields supported by this feature.

You can have unlimited import maps, in case you have multiple formats of import files.

For a list of the fields to which you can map imported information, please refer to page 11 of this release bulletin.

Import Mapping

The **Gift Import** feature will support three formats. You can choose Delimited, Excel, or XML.

To learn about importing delimited files, please refer to page 6.

To learn about importing from Excel, please refer to page 7.

To learn how to import from XML, please refer to page 8.

Import Walk-Through

Action	Comments
1. Open the Giving menu.	
2. Select Imports ▶ Gifts (or Pledges).	<i>The Gift (or Pledge) Import list will open (page 3).</i>
3. Click the New button in the Gift (or Pledge) Import list.	<i>The Gift Import defaults dialog opens (page 4).</i>
4. In the dialog, enter or select the default value for the gift fund in the <i>Fund</i> field.	
5. Make sure the <i>Fiscal Year</i> and <i>Appeal Year</i> fields are correct.	
6. Enter any other default values that you want.	
7. Use the Search button to the right of the <i>File</i> field to select the import file.	
8. You can use the drop-down list to select the <i>Import Map</i> .	<i>If you need to create a new import map, click the Search button to access the Import Map List.</i>
9. Click the OK button to import the gifts.	<i>As the information is processed, you will see a dialog that notifies you of the progress.</i>
10. When the import process is complete, an Update Confirmation Message will inform you, "Import Data was successfully loaded." Click the OK button.	<i>You will be returned to the Gift (or Pledge) Import list, which will populate with the imported gift information. If there were any errors, the gift record appears in red and the error codes are listed in the Errors column.</i>
11. If you can correct the errors at this time, highlight the row and then click the Edit button.	<i>When you use the Edit button, the Gift (or Pledge) Import Edit dialog box opens, allowing you to make corrections (page 9). You must correct the errors to post the transactions that are in red.</i>
12. Once you have made all of the corrections, click the Post as Gift Batch button.	
13. Select the report to print and then click the OK button.	<i>Turn to page 10 to see the Print Options dialog.</i>
14. Click the OK button in the Gift Import Created Successfully message.	
15. You can now edit the Gift/Pledge Posting batch as you would any other.	<i>Please refer to the Senior Alumni/Development System Reference Guide: Volume 2 for details.</i>

Gift and Pledge Import Features

The imports for gifts and pledges allow you to import from TXT, CSV, and other fixed length files, as well as spreadsheets and XML files. You define an import map once for the file format, which you can then use each time you import a file in that format.

In order to import a file of transactions, you use the import map so that the system knows what values are associated with ALUMNI/DEVELOPMENT fields. You can create an unlimited number of import maps, in case you have multiple formats of import files.

Importing Gifts

To begin importing gift transactions, you would open the **Giving** menu and then select **Imports > Gifts**. The **Gift Import** list opens. Please refer to the illustration below for a description of this screen.

If an error occurs during the import, the detail line for the gift will appear in red and the code for the error will be shown in the Errors column. Please refer to the next page for an explanation of the error codes.

The screenshot shows the 'Gift Import' window with a table of gift transactions. The table has columns for Errors, I.D., Name, Gift Date, Gift Amount, and Fund. Below the table are two groups of buttons: 'This Import' (Post as Gift Batch, Delete, Save, Legend) and 'Entries for this Import' (New, Edit, Delete). Callouts provide instructions for each button.

Errors	I.D.	Name	Gift Date	Gift Amount	Fund
	0000002	Colonel John O'Neill	11-02-2005	120	FUND 1
	0000003	Major Samantha O'Neill	11-06-2005	221	FUND 7
	0000004	Mrs. Ellen M. Baker	10-06-2005	277	FUND 7
	0000005	Mr. John M. Baker	10-06-2005	483	A1
	0000006	Ms. Gina Cabot	10-06-2005	60	FUND 6
	0000007	Alpha-Graphics	10-06-2005	454	FUND BE
	0000008	Mrs. Meighan Talbot	11-06-2005	25	FUND 2A
	0000009	Mr. Jacob Talbot, '70	11-12-1999	1000	A1
	0000010	Mrs. Frances Cook	11-06-2005	250	FUND 6
	0000011	Mr. Samuel Cook, '02	12-08-2005	1000	FUND 2
	0000012	Dr. Brian S. Blair, MD	09-27-2005	250	FUND BE
	0000016	Mr. George O. Jung, III	11-28-2001	544	FUND 7
	0000019	Mr. Henry L. Chambers, Jr.	09-27-2005	250	FUND BE
	0000020	Joan S. Blankenship	11-06-2005	178	FUND 1
	0000021	Janet R. Reese, '89	03-30-2001	350	FUND 5
	0000022	Dr. Jonathan D. Reese, '88	11-06-2005	367	FUND 7
	0000025	Mrs. Ethel Gift	09-27-2004	200	FUND BE

This Import

Post as Gift Batch Delete Save Legend

Entries for this Import

New Edit Delete

Click this button to create a Gift/Pledge Posting batch from the imported gifts

To delete the entire batch, click this button

You can save the import batch and finish it at your convenience if you click the Save button

Click this button to view the Import Legend dialog, which describes the error codes

Click the New button to select an import file to process and an associated map

To make changes to an imported record, highlight the row and then click this button

To remove a single entry from the batch highlight the row and then click this Delete button

Import Defaults

When you click the **New** button in the **Gift Import** list, the **Gift Import** dialog will open. This screen allows you to set defaults for fields that might not have been completed in the original file, as well as to select the file and import map that you want to use.

Once you have entered all of the necessary information and are ready to process the gift import file, click the **OK** button. After the import

is complete, an Update Confirmation Message will inform you, "Import Data was successfully loaded." Click the **OK** button to return to the **Gift Import** list, where the imported transactions are listed.

The **Pledge Import** dialog is very similar: the only differences are that it does not include the Type field at the top or the Receipt Type drop-down list.

This will display Gift in the Gift Import feature

Select a default primary gift fund for imported gifts if a record has no value. (This field is required.)

Enter the default fiscal year and month for the imported gifts. (required fields)

When you import gifts related to an appeal, use these fields to select the default values

Use the Search button to the right of this field to select the file that you want to import

Select the Import Map that you need to use for the import file

To begin the gift import process, click the OK button

To close the dialog and return to the Gift Import list, click the Cancel button

Select a default Receipt Acknowledgement for gifts that have no value

Select a default Thank You Letter 1 for gifts that have no value

Select a default Thank You Letter 2 for gifts that have no value

Indicate whether or not the imported gifts should be included in constituent giving levels

Indicate whether or not the imported gifts should be included in constituent consecutive years given

Error Codes

Any errors that apply to a gift will be shown in the Errors column. For a brief explanation of the error codes, you can click the Legend button in the **Gift Import** list. These codes are also described in a table on the next page.

You must correct a gift's errors before you can import the information.

Errors	
C	Missing or Invalid Constituent I.D.
S	Invalid Solicitor I.D.
D	Missing or Invalid Gift Date
\$	Missing or Invalid Amount or Total Amount is not equal to Fund Amount
F1 - F5	Invalid Funds - Fund 1 to 5
Y	Invalid Fiscal Year
M	Invalid Fiscal Month
A	Invalid Appeal for Constituent

Close

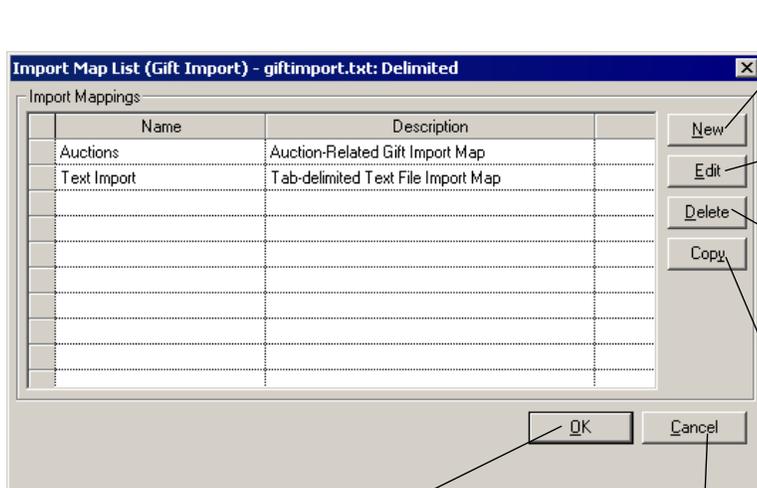
NUM

Code	Description
C	Constituent ID in the import file did not match any constituent records in the database.
S	When an import map included the Solicitor ID field, this indicates that the record did not use a valid ID for the solicitor.
D	The Gift Date was invalid or undefined.
\$	The Gift Amount was not included in the record, or you chose to import the Fund Amounts and these do not equal the total amount of the gift.
F1-F5	The values for Funds 1 through 5 in the imported record do not match fund numbers in your database.
Y	The imported Fiscal Year does not match a year in your database.
M	The imported Fiscal Month does not match a month in your database.
A	The constituent is not assigned to the Appeal indicated in the record.

Import Mapping

In order to import a file of gift transactions, you need to use an import map so that the system knows what values are associated with which ALUMNI/DEVELOPMENT fields. When you are in the **Gift Import** dialog (page 4), you can select the import map that you want to use with the file that you have selected for the import.

Click the Search button adjacent to the *Import Map* field to open the **Import Map List** dialog. You can choose from three formats: delimited text, Excel, and XML. When you click the Search button to choose the import map, the **Import Map List** displays the available maps based on the file type that has been selected in the *File* field. For example, the illustration below shows a sample list of text import maps.



Click the New button to create a new import map. The Import Map dialog box will open.

To make changes to an existing import map, highlight the row and then click the Edit button.

Import maps are in control of your school and may be deleted at any time. If you delete a map, it will be deleted from the entire system, therefore you should make sure none of your colleagues uses a map before deleting it.

You can use the Copy button to copy an existing map in order to use it as the basis for a new one that will be very similar.

Highlight the map that you want to use and then click the OK button to select it. You will return to the Gift Import dialog so that you can use the import map.

Click the Cancel button to return the Gift Import dialog without selecting an import map.

Delimited Files

In the February release of ALUMNI/DEVELOPMENT, you will be able to import delimited (CSV, DAT, PRN, TXT, etc.) files using the Gift or Pledge Import. Please refer to the list to learn about the requirements for delimited files.

When you create the import map for the delimited file, you will be using the dialog box shown in the following illustration. Please note that the Gift (or Pledge) Date, Constituent ID, and Amount fields are required; you cannot save the import map without a value in the Import Field/Data for these fields.

Text File Format Specifications
The first line of the file can be a header row
All lines of the file must contain the same number of fields

The delimiters used in the file must be consistent and not contradictory. For example, if a file is comma delimited and a field contains a comma (e.g., Andrew Smith, MD), the system will see the comma in the field as a break between fields. In this case you would either need your file to use quotes around all items, which might help, or another delimiter.

Make sure that fields are formatted correctly. For example, dollar signs and commas in amounts are not supported.

There must be delimiters for all fields, whether or not the field contains a value.

If you are having trouble editing the contents of the delimited file, you should be able to open it in Excel® and edit it there. You can then save it as a delimited file or as an Excel file (see next page).

This is the number of rows, starting at the beginning of the import file, that should not be imported (e.g., to skip a header row, you would enter 1).

Use the field and buttons to scroll through the information in the import file. The record that you are viewing will be shown in the right side of the table.

The name of the import map

Description of the import map

Field separators allow the system to determine the beginning and ending of each data field being imported

These are the pre-defined fields into which you can import data

These are the fields from the import file. Select the field from the import file that maps to the database field on the left.

Use the New button to add a row to the import map

Use the Cut button to delete a row from the import map. You may paste the row after you have cut it.

If you have cut a row, you can paste it using this button

Click the OK button to save the import map and return to the Import Map List dialog

To close the import map without saving changes, click the Cancel button

To print the Import Map Definition, click the Print button

Import Map (Gift Import) - z:\sample import files\giftimport.txt: Delimited

Name: Text Import Description: Tab-delimited Text File Import Map

Field Mapping

Delimiters: Begin End <TAB> Last End Records to Skip: 0 View Record No: 1

Senior Gift Field	Import Field/Data
Gift Date	3) - Date Received
Constituent I.D.	2) - Constituent ID
Amount	4) - Gift Amount
Attribute	6) - Gift Attribute
Fund 1	5) - Gift Fund Number
Payment Type	7) - Payment Type
Appeal Year	12) - Gift Appeal Year
Fiscal Month	14) - Gift Fiscal Month
Fiscal Year	15) - Gift Fiscal Year
Payment Date	8) - Payment Date
Payment Bank Number	9) - Payment Bank Number
Payment Ref. Number	10) - Payment Reference Number
Payment Expiration Date	11) - Payment Expiration Date
NPV Amount	13) - Net Present Value
Receipt Type	16) - Gift Receipt Type
Receipt Amount	17) - Gift Receipt Amount
Letter 1 Type	18) - Gift Letter 1 Type
Full Name	20) - Constituent Full Name

Buttons: New, Cut, Paste, OK, Cancel, Print

Excel Files

In the February release of ALUMNI/DEVELOPMENT, you will be able to import spreadsheet (DBF, DIF, ?QY, WB?, WKS, and XL?) files using the Gift or Pledge Import. Please refer to the list to learn about the requirements for Excel files.

When you create the import map for the Excel file, you will be using the dialog box shown in the following illustration. Please note that the Gift (or Pledge) Date, Constituent ID, and Amount fields are required; you cannot save the import map without a value in the Import Field/Data for these fields.

You can only import from Microsoft® Excel 97 and above.

Excel File Format Specifications
The first line can be a header row
You can only import one spreadsheet page at a time

The columns in spreadsheets delineate clearly where one field ends and another begins. Unfortunately, it is a little more difficult to see a header row, if any. Here are some tips to make it easier:

Remove columns that contain data which cannot be imported. See the list beginning on page 11 to determine which fields can be imported.

Next, make sure that the remaining columns are formatted correctly: the amount columns should hold dollar amounts formatted as numbers; dollar signs and commas are not supported. Check that all constituent IDs include leading zeroes, if any. Date fields should be formatted as MM/DD/YYYY. The Fund 1 through 5 fields require the fund ID, not the name.

This is the number of rows, starting at the beginning of the import file, that should not be imported (e.g., to skip a header row, you would enter 1).

Use the field and buttons to scroll through the information in the import file. The record that you are viewing will be shown in the right side of the table.

The name of the import map

Description of the import map

Use the drop-down list to select the worksheet that contains the import data

These are the pre-defined fields into which you can import data

Select the spreadsheet column to import

Examples of the data in each of the selected columns

Use the New button to add a row to the import map

Use the Cut button to delete a row from the import map. You may paste the row after you have cut it.

If you have cut a row, you can paste it using this button

Click the OK button to save the import map and return to the Import Map List dialog

To close the import map without saving changes, click the Cancel button

To print the Import Map Definition, click the Print button

Senior Gift Field	Import Field	Sample Data
Gift Date	C	10/6/2005
Constituent I.D.	B	0000007
Amount	D	454
Attribute	F	Paver
Fund 1	E	FUND BE
Payment Date	H	
Payment Type	G	
Payment Bank Number	I	
Payment Ref. Number	J	
Payment Expiration Date	K	
Appeal Year	L	2005
Fiscal Month	N	5
Fiscal Year	O	2006
Receipt Type	P	Gift for Academy
Receipt Amount	Q	454
Letter 1 Type	R	
NPV Amount	S	0
FullName	T	Alpha-Graphics

XML Files

In the February release of ALUMNI/DEVELOPMENT, you will be able to import XML (eXtensible Markup Language) files using the Gift or Pledge Import. Please refer to the list to learn about the requirements for XML files.

When you create the import map for the XML file, you will be using the dialog box shown in the following illustration. Please note that the Gift (or Pledge) Date, Constituent ID, and Amount fields are required; you cannot save the import map without a value in the Import Field/Data for these fields.

For a sample XML file, please refer to page 10.

Please note that the XML import is only supported in Windows 98 and above. Windows 95 and below is not supported because of Microsoft ® restrictions.

XML File Format Specifications
Attributes, Name Spaces, Schemas, and XSL transformations are ignored by the import
All the data to be imported must reside in the text of leaf Node Elements (<i>i.e.</i> , Node Elements without children)
For each record Node Element (in the example on page 10, Node Elements where tag name="Gift"), the qualified tag names of all descendent leaf nodes must be unique
Gifts are imported one at a time, not as a group by constituent. Therefore, the file must be laid out in such a manner where all information associated with a gift lies in the text of the leaf Node Elements that are descendents of the Gift Node Element.

This is the number of rows, starting at the beginning of the import file, that should not be imported. (There is typically no header row in XML files, so you would generally set this to 0.)

Use the field and buttons to scroll through the information in the import file. The record that you are viewing will be shown in the right side of the table.

The name of the import map

Description of the import map

Use the drop-down list to select the tag name of the Gift Node Element

These are the pre-defined fields into which you can import data

Select the fields that you want to import from the import file

Examples of the data in each of the selected columns

Use the New button to add a row to the import map

Use the Cut button to delete a row from the import map. You may paste the row after you have cut it.

If you have cut a row, you can paste it using this button

Click the OK button to save the import map and return to the Import Map List dialog

To close the import map without saving changes, click the Cancel button

To print the Import Map Definition, click the Print button

Senior Gift Field	Import Field	Sample Data
Gift Date	GiftDate	11-02-2005
Constituent I.D.	ConstituentID	0000002
Full Name	FullName	Colonel John O'Neill
Amount	GiftAmt	120
Appeal Year	AppealYear	2005
Payment Bank Number	PymtBankNo	2046616484
Payment Ref. Number	BankRefNo	111
Payment Expiration Date	CardExpDate	
Payment Date	PymtDate	11-02-2005
Payment Type	PymtType	Gift
Fiscal Month	FiscalMonth	11
Fiscal Year	FiscalYear	2006
Fund 1	GiftFund	Fund 1
Receipt Type	ReceiptType	Alumni Association Gift
Receipt Amount	ReceiptAmt	120
Letter 1 Type	Letter1Type	Alumni Association Thank You

Edit an Imported Gift Transaction

You are able to edit any gifts in a batch of imported files from the **Gift Import** list (page 3). To do so, you would simply highlight the row that you want to edit and then click the **Edit** button.

Clicking this button opens the **Gift Import Edit** dialog box, shown in the following illustration.

The constituent's ID

The amount of the gift

The fiscal year

The fiscal month

Constituent ID of the solicitor

Receipt acknowledgement

Thank you letter 1

Thank you letter 2

There can be up to five distributions for the gift. The distribution total must equal the gift amount before you can post the gift.

Date of the gift

The type of the gift (normal, stock, or in-kind)

The year of the appeal

Select the name of the appeal from the drop-down list; you cannot post a gift if the constituent is not assigned to this appeal.

Click the OK button to save your changes and close the dialog box

To close editor without saving your changes, click the Cancel button

Edit an Imported Pledge Transaction

You can also edit any pledges in a batch of imported files from the **Pledge Import** list. To do so, you would simply highlight the row that you want to edit and then click the **Edit** button.

Clicking this button opens the **Pledge Import Edit** dialog box, shown in the following illustration.

The constituent's ID

The amount of the pledge

The fiscal year

The fiscal month

The fund of the pledge

Constituent ID of the solicitor

Constituent ID of the matching company

Thank you letter 1

Thank you letter 2

Date of the pledge

The year of the appeal

Select the name of the appeal from the drop-down list; you cannot post a pledge if the constituent is not assigned to this appeal.

Click the OK button to save your changes and close the dialog box

To close editor without saving your changes, click the Cancel button

Post the Import

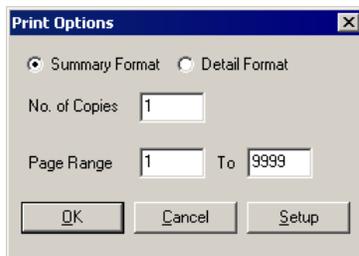
After you have imported and edited the gifts from the import file, you can do one of two things:

- ☑ Click the Save button in the **Gift Import** list (page 3). You can continue to import gifts into the batch and correct any errors at your convenience.
- ☑ Create a Gift/Pledge Posting batch, where you can edit the gifts in further detail and post them to the database.

All errors must be corrected before you can post the batch.

Create the Gift/Pledge Posting Batch

Indicate whether you want to print the summary or detail format of the report. The Summary Format will print the Gift Import Posting batch report. The Detail Format prints the Gift Detail Report. Please refer to the *Senior Alumni/Development System: Volume 3* for examples of these reports.



When you have set the options that you want, click the **OK** button. This action will create the **Gift/Pledge Posting** batch and print the selected report. You will see a message when the gift batch has been created.



Once you have imported the file into **Gift/Pledge Posting**, you can edit and post the batch containing the gifts as you would any other.

Sample XML File

In XML, elements are the unit of content. XML uses tags like those in HTML to name elements and a hierarchical structure to relate the file elements. All elements need open and close tags and the name of the element type must match.

There is always a root element, which is the name of the document. In the sample XML file, "<GiftImport>" is the root element. The root element is closed at the end of the file, "</GiftImport>."

The elements and contents make up the body of the file. To indicate the start and end of a transaction, our sample XML file uses "<Gift>" and "</Gift>." The contents are the ConstituentID, GiftDate, GiftAmt, etc.

```
<?xml version="1.0" ?>
<GiftImport>

  <Gift>
    <ConstituentID>0000002</ConstituentID>
    <FullName>Col. John O'Neill</FullName>
    <GiftDate>11-02-2005</GiftDate>
    <GiftAmt>120</GiftAmt>
    <GiftFund>FUND 1</GiftFund>
    <PymtDate>11-02-2005</PymtDate>
    <PymtType>Gift</PymtType>
    <PymtBankNo>2046616484</PymtBankNo>
    <BankRefNo>111</BankRefNo>
    <CardExpDate/>
    <AppealYear>2005</AppealYear>
    <FiscalMonth>11</FiscalMonth>
    <FiscalYear>2006</FiscalYear>
    <Receipt>Alumni Assoc. Gift</Receipt>
    <ReceiptAmt>120</ReceiptAmt>
    <NetPresentValue/>
  </Gift>

</GiftImport>
```

Available Fields for Gift Import

The following fields are supported by the **Gift Import** feature.

Import Name	Description	Required?
Amount	Gift amount	✓
Anonymous	Anonymous flag on gift	
Appeal Year	Year of appeal	
Attribute	Gift attribute (not Giving Attribute)	
Comments	Comments on the gift	
Constituent ID	ID of the constituent	✓
First Name	Constituent's first name	
Fiscal Month	Month of the fiscal period	
Fiscal Year	Year of the fiscal period	
Full Name	Full name of the constituent	
Fund 1	First distribution fund	
Fund 2	Second distribution fund	
Fund 3	Third distribution fund	
Fund 4	Fourth distribution fund	
Fund 5	Fifth distribution fund	
Fund Amount 1	Amount distributed to first fund	
Fund Amount 2	Amount distributed to second fund	
Fund Amount 3	Amount distributed to third fund	
Fund Amount 4	Amount distributed to fourth fund	
Fund Amount 5	Amount distributed to fifth fund	
Gift Date	Date of the gift	✓
Last Name	Constituent's last name	
Letter 1 Print Date	Print date of first Thank You letter	
Letter 1 Type	First Thank You letter type	
Letter 2 Print Date	Print date of second Thank You letter	
Letter 2 Type	Second Thank You letter type	
Letter Note	Note for Thank You letters	
Middle Name	Constituent's middle name	
NPV Amount	Net Present Value	
Payment Bank Number	Bank number from the payment data	
Payment Date	Date of the payment	
Payment Expiration Date	Expiration date of payment credit card	
Payment Note	Note regarding the payment	
Payment Ref. Number	Payment reference number	
Payment Type	Type of payment (check, credit card, etc.)	
Receipt Amount	Amount to use for the Receipt Acknowledgement	
Receipt Note	Note for Receipt Acknowledgement	
Receipt Print Date	Print date of Receipt Acknowledgement	

Import Name	Description	Required?
Receipt Type	Receipt Acknowledgement type	
Solicitor ID	ID of the solicitor	
Stock Company	Name of the company that issued the stock	
Stock Fee Amount	Any fees accrued for the sale of the stock (e.g., broker fee)	
Stock High Value	High value of the stock	
Stock Low Value	Low value of the stock	
Stock Median Value	Median value of the stock	
Stock Number of Share	Number of shares your organization will to receive	
Stock Sale Amount	Amount received for the sale of the stock	
Sub Type	Gift sub-type (normal, stock, in-kind)	
Suffix	Constituent's suffix	
Title	Constituent's title	

Relations Tab in Constituent Maintenance

This tab has been enhanced to display more details. When you highlight the relation in the tab, you can view the information on the right side of the Relations tab.

The icons have also been updated.

-  The primary or secondary constituent
-  Constituent relation
-  Student relation
-  Other type of relation

