

Alumni Development Release Bulletin

August 2009

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About Release 91_4

The latest release of Senior Systems Alumni Development includes a significantly enhanced and re-designed Giving Summary tab for the Constituent Maintenance screen, to provide a large amount of complex information in a more helpful, concise, and customizable way. Also, there are several other enhancements and changes, including the expansion of the Fund Name field and addition of the Fund Comments field for export and query, the addition of the Pledge Schedule fields for export and query, the ability to customize matching gift headers for online giving in My Backpack, changes to the programs that process and display prospect manager information, and enhanced search capabilities for the Pay Fees and Pay Sponsorships functions in the Events application.

As always, if you have any questions about these new and enhanced features, be sure to contact Senior Systems Product Support for assistance!

Redesigned Giving Summary Tab on Constituent Maintenance Screen

The Giving Summary tab has been significantly enhanced and re-designed to make it easier to view the information in which you are most interested:

Constituent Maintenance - (James Abbott '86 CP AL PA/ Lilly Abbott '90 CP AL PA)

Name | Salutations | Address | Info | Attributes | Relation | Activity | Education | Solicitor | Mailings
 Prospects | Giv. Summary | Giv. Detail | Track | Events | Media | Custom | Comments | Web ID

Consec Yrs Given: # Yrs: 3, This Yr: Yes
 Household: 3, Giving Levels: [Select Options]

Options:
 Display: Gifts + Pledges
 Display for: Household
 Soft Credits: Include All
 Matching Credits: Include All
 Campaigns: All
 Funds: All

Lifetime Giving

Summary	Amount	Date	#
Total Pledges	7,600.00		5
Average Yearly Donation	1,646.67		
Total Gifts/Payments	4,940.00		17
Outstanding Pledge Balance	7,400.00		4
Total Writeoffs	0.00		0
Largest Pledge	3,000.00	03-10-2009	
First Pledge	200.00	09-24-2007	
Last Pledge	3,000.00	03-10-2009	

By Campaign

Campaign	Total	Current Year	Last Year	Year Before Last	Prior Years
Capital	1,000.00	1,000.00	0.00	0.00	0.00
Library	6,000.00	6,000.00	0.00	0.00	0.00
Operations	5,430.00	1,030.00	3,200.00	1,200.00	0.00
Alumni Directory	30.00	30.00	0.00	0.00	0.00
Alumni Reunion	40.00	40.00	0.00	0.00	0.00
TOTAL	12,500.00	8,100.00	3,200.00	1,200.00	0.00

Marital Status: Married
 OK Cancel Print NUM

You can select from a variety of options that determine which components are used for the calculations, and the section and field titles on the screen will change to reflect your choices. And, as with tables on many other screens in the Senior Systems applications, you can make changes to column sizes and sequencing and optionally save those settings for future use, allowing you to customize the screen for your specific needs. The changes and comparisons with the previous screen are reviewed here in detail by section of the screen.

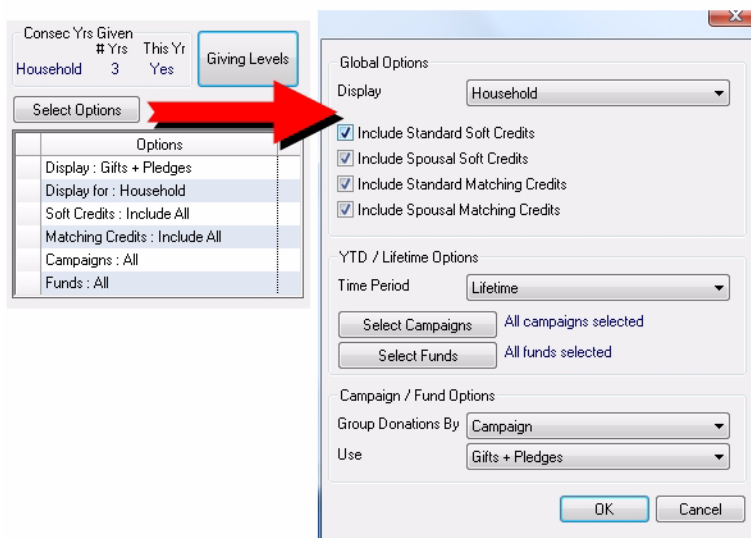
Data Selection and Consecutive Years Section

Previously, the options to select the data components for calculations were near the bottom of the screen, and it was sometimes unclear as to which calculations each choice was applied:

Soft Credits: Include All
 Type: Gifts + Pledges
 Include Matching Credits: ☐
 Campaign: ☒ Fund: ☐
 Display: Both

There is now a section at the upper left to display the current choices for calculations and data display (depending on your selections, you may be able to expand/contract the list of

campaigns or funds, and may need to scroll to see them all), and it includes a Select Options button that invokes a popup window to change any or all of the options. This popup window groups the options clearly so that you know which calculations will be affected:



- **Global Options** affect all of the data on the screen. There is a dropdown to use Constituent, Spouse, or Household data, as well as checkboxes to include or exclude the various types of soft and/or matching credits.
- **YTD / Lifetime Options** affect the data displayed in the top right section of the screen. You can choose either lifetime or year-to-date data, and you can optionally select the particular funds or campaigns to include in the calculations.
- **Campaign / Fund Options** affect the data displayed in the bottom section of the screen. You can choose to group donations by campaign or by fund, and to use either "Gifts + Pledges" or "Gifts + Payments" for the calculations.

As in previous releases, after making changes to the display options, you can choose to save the settings so that you don't have to make the same selections each time you view the Giving Summary tab for a constituent record.

This section of the screen also now includes the Consecutive Years information, which was previously at the top right of the screen. This data now changes based on your choices for Global Options as described above.

The Giving Levels button to access and optionally edit any special giving level designations for the constituent and spouse has moved from the bottom right of the screen to the top left, but continues to function in the same way that it did previously.

YTD / Lifetime Giving Section

Previously, there were several statistical calculations displayed across the top of the screen. Although the data displayed did change based on certain option selections, some of the figures were not calculated for households.

Giving Statistics		Year To Date	Count #	Lifetime	Amount	Date	Consec Yrs Given		
Pledges		4,000.00	2	4,000.00	Largest Pledge	N/A	# Yrs	This Yr	
					Last Pledge	N/A	Constituent	3	Yes
Gifts/Pymts		605.00	8	1,505.00	Largest Gift/Pymt	N/A	Spouse	1	No
					Last Gift/Pymt	N/A			
Gifts/Pymts with SC		3,440.00	15	4,940.00	Largest Gift/Pymt with SC	N/A			
					Last Gift/Pymt with SC	N/A			

The new screen section has been consolidated into a table that you can customize for your needs. Based on the options you select, this section displays either lifetime or year-to-date figures, and you now have new options (as selected via the Select Options popup described previously) that allow you to include or exclude particular campaigns and/or funds for the calculations:

Lifetime Giving				
Summary	Amount	Date	#	
Total Pledges	7,600.00		5	Up
Average Yearly Donation	1,646.67			Down
Total Gifts/Payments	4,940.00		17	Top
Outstanding Pledge Balance	7,400.00		4	
Total Writeoffs	0.00		0	
Largest Pledge	3,000.00	03-10-2009		
First Pledge	200.00	09-24-2007		
Last Pledge	3,000.00	03-10-2009		Legend

Dates and number of transactions are included where relevant. You can scroll down to see the rest of the data, and you can customize this section by moving, hiding, and re-sizing columns, and/or changing the sequence of the rows (for example, to put your most important information at the top) using the Up, Down and Top buttons to the right. You can also export the currently displayed table to an Excel spreadsheet file.

To further help you understand the data, there is also now a Legend button that invokes a popup window with details about how each figure is calculated.

Important!: If you currently have any exports or queries that make use of the Giving Summary fields, you will want to update those to use the summaries from the Gifts/Pledges fields, to ensure consistency with the data displayed on the screen.

Campaigns / Funds Section

Previously, this section of the screen displayed several years of data, labeled by fiscal year, with an off-screen total for each row that you could scroll to on the far right:

Campaign	2008-2009	2007-2008	2006-2007	2005-2006	2004-2005	Pre-2004
Capital	1,000.00	0.00	0.00	0.00	0.00	0.00
Library	3,000.00	0.00	0.00	0.00	0.00	0.00
Operations	1,030.00	3,000.00	800.00	0.00	0.00	0.00
Alumni Directory	30.00	0.00	0.00	0.00	0.00	0.00
Alumni Reunion	40.00	0.00	0.00	0.00	0.00	0.00
	5,100.00	3,000.00	800.00	0.00	0.00	0.00

The new screen section still displays totals by campaign or by fund (as selected via the Select Options popup described previously), but it now shows Current Year, Last Year, Year Before Last, Prior Years (as a single figure), and Total, with no scrolling required:

Campaign	Current Year	Last Year	Year Before Last	Prior Years	Total
Capital	1,000.00	0.00	0.00	0.00	1,000.00
Library	6,000.00	0.00	0.00	0.00	6,000.00
Operations	1,030.00	3,200.00	1,200.00	0.00	5,430.00
Alumni Directory	30.00	0.00	0.00	0.00	30.00
Alumni Reunion	40.00	0.00	0.00	0.00	40.00
TOTAL	8,100.00	3,200.00	1,200.00	0.00	12,500.00



As with the YTD / Lifetime Giving section, you can re-size, hide, and re-arrange columns, save your table settings for future use, and/or export the data currently displayed to an Excel spreadsheet file.

How To Use the New Giving Summary Tab

From the Constituent Maintenance Screen, click to select the Giv. Summary tab. Check the display options table near the top left of the screen to be sure you are viewing the type of data that you want.

- **To make any changes to the type of data displayed**, click the Select Options button to access the popup window. From here you can use the dropdowns, checkboxes, and campaign and fund selection lists to make your choices and then click OK to update the screen. (Refer to the previous discussion about the Select Options popup window for more details about where each of these choices applies.)
- **To save your display choices for future use**, right-click a blank area of the screen and select Save Settings (or Clear Settings to clear previously saved settings).

- **To view or edit giving level information**, click the Giving Levels button to access the popup window. If you make any changes (via the dropdowns), you can click OK to save them, or Cancel to discard.
- **To re-order the rows in the YTD / Lifetime Giving table**, click on a row to select it, and then click the Up, Down, or Top button(s) as necessary to place the row where you want. Repeat for other rows until all the rows are set as desired. This sequence is automatically saved so that every time you access the Giving Summary tab for a constituent, you will see the data in the same sequence.
- **To make and/or save changes to the table layout for either of the data tables**, you can use some of the table modification options common to many tables in Senior Systems applications:

Action	Procedure
Change column width	Place cursor in table title line, on border between columns, until you see the column width symbol (); click and drag the border to expand or contract the column width
Change column sequence	Place cursor in table title line of column you want to move, on border between table and data, until you see the column move symbol (); click and drag column to desired position
Automatically size column	Place cursor in table title line of desired column; right-click and select Auto Size
Lock columns for horizontal scrolling	Place cursor in table title line of right-most column to lock in place; right-click and select Column Lock ON
Unlock columns for horizontal scrolling	Right-click anywhere in table title line and select Column Lock OFF
Hide column	Place cursor in table title line of column; right-click and select Hide Column(s)
Un-hide column	Right-click anywhere in table title line and select Show Hidden Column(s), then select the desired column name or select Show All
Save settings (this table ONLY)	Right-click anywhere in table title line and select Save Table Settings
Clear saved settings (this table ONLY)	Right-click anywhere in table title line and select Clear Table Settings

Action	Procedure
Save settings as default for all users (this table ONLY)	Right-click anywhere in table title line and select Save Settings As Default
Clear saved default settings (this table ONLY)	Right-click anywhere in table title line and select Clear Default Settings
Export to Excel	Right-click anywhere in table title line and select Excel Export, then browse to the desired location, enter a file name and click Save; click Yes if you want to open the file right away, or No to return and continue

Expanded Fund Name Field and Fund Comments Export/Query

- **Fund Name** - The Fund Name field on the Fund Maintenance Screen has been expanded to allow values up to 100 characters.
- **Fund Comments** - The Fund Comments field on the Fund Maintenance Screen is now available for export/query (Gifts/Pledges > Campaigns/Funds > Fund Comments).

Pledge Schedule Fields Available for Export/Query

A new Pledge Schedules node has been added for exports and queries so that you can now utilize all of the Pledge Schedule detail fields, including each scheduled date and the amount due for the date, as well as amounts paid, and all of the previously available gifts and pledges fields. This makes it possible to create a much wider variety of pledge projection exports and queries covering various date ranges, and to easily answer questions such as when the next payment is due.

The following example illustrates the basic procedure for using this new node to create a customized pledge projection export for the remaining months in the calendar year. You can easily modify this procedure to create exports using whatever time frame you prefer.

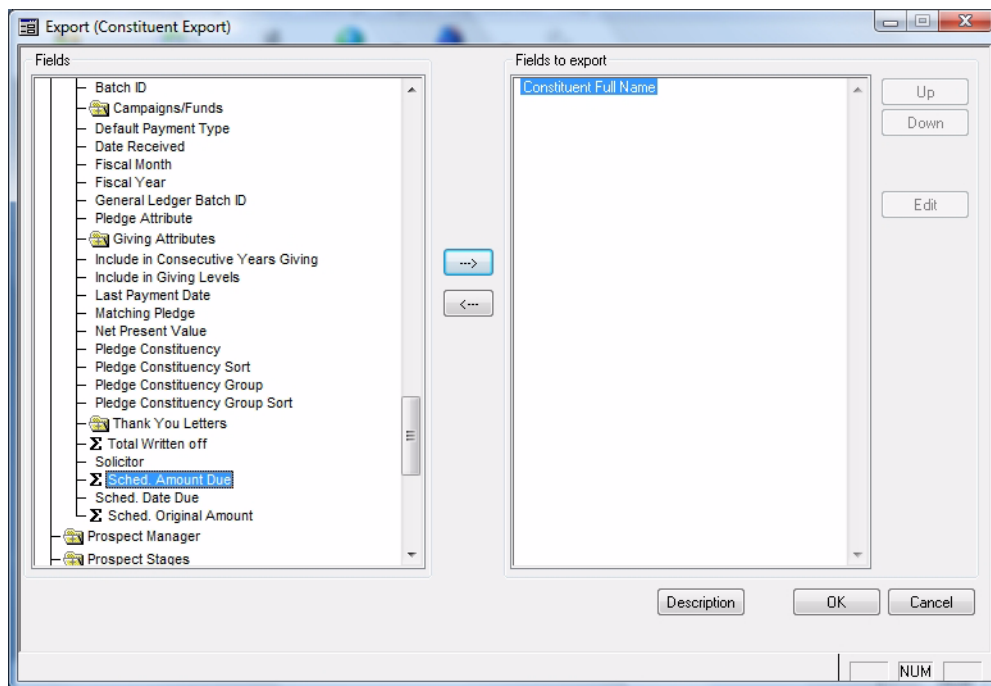
Pledge Projection Export Example

Your objective is to export, for each constituent who currently has an open pledge to the Capital Campaign, the total amount that you expect to receive from him/her for each month between now and the end of the calendar year, including the total for the entire time period, and when to expect each constituent's next payment.

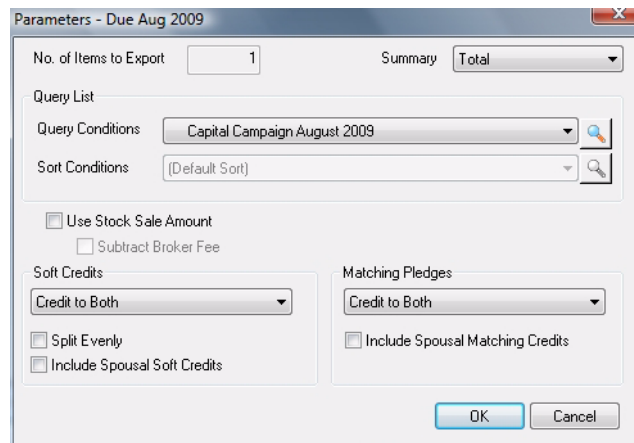
To simplify this process, we have broken it down into four basic parts. You may want to add other steps to include additional information or to otherwise arrange and label the export fields for your own purposes.

Part I in the process is to create the new export (with some biographical information to identify the constituent) and calculate the total schedule amounts due from each constituent by month between now and the end of the calendar year:

1. Select **Export > Create/Run Export** from the Alumni/Development menu, click New to create a new export, then click OK to choose Constituent.
2. Select some biographical information to identify the constituent (such as Full Name), and then open the Pledge Schedules node:

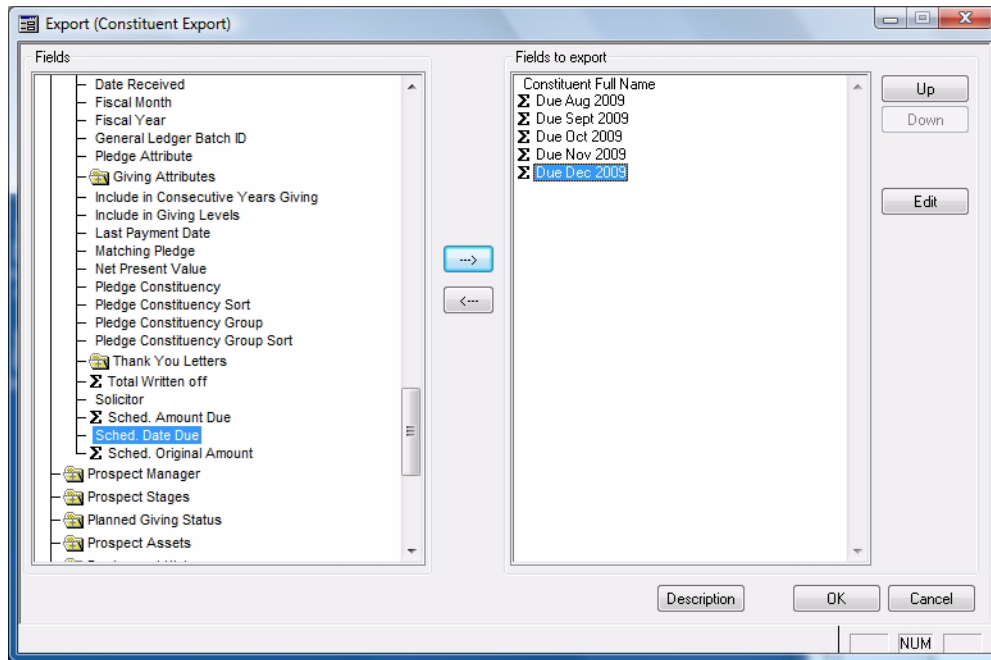


3. Select the summary field for Sched. Amount Due, choose to calculate a total, and then use a query to limit the calculation to the first month desired (in this example, August 2009) for just the Capital Campaign (creating the new query if it doesn't already exist):



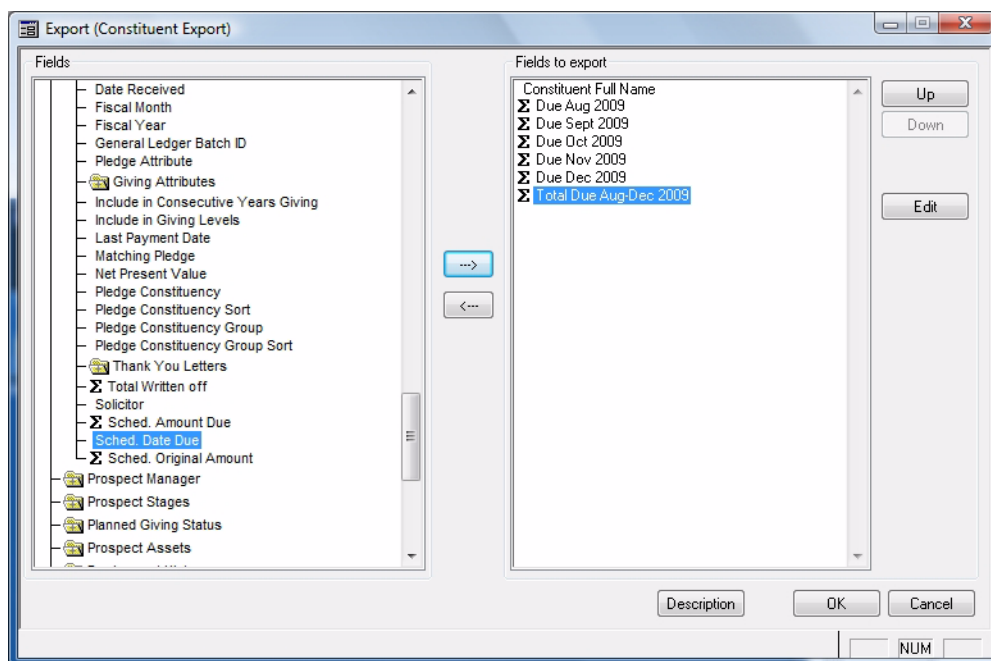
Click OK and then rename the export column for clarity (e.g. Due Aug 2009).

4. Repeat step 3 for each month to include, using a different query each time so that you total only the month desired, and renaming the export column appropriately.



Part II in the process is to calculate a total for each constituent, summarizing all scheduled payments due between now and the end of the calendar year:

- Repeat the same process that you used in step 3, but this time, use a query that covers the entire date range for the Capital Campaign:

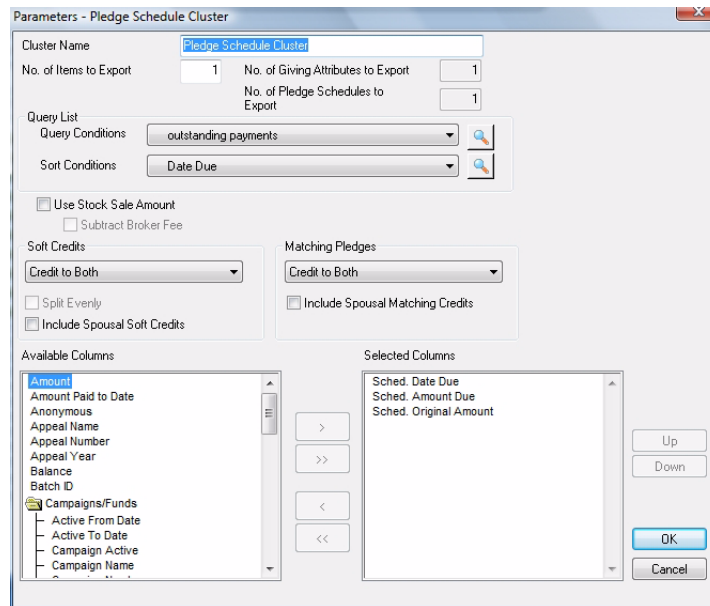


Part III in the process is to identify the next outstanding payment for each constituent:

6. Select the Pledge Schedule cluster, which allows you to apply the same query selection parameters to multiple export fields, and specify the number of items to export (the default of 1 in this case is correct, since you only need the next payment due, but increasing this number to N would give you the next N payments due):

7. Use a query condition (creating the query if necessary) that limits the selection to outstanding payments only (those with amounts due that are greater than 0), and use a sort condition to sort the results by Due Date, so as to select the next scheduled payment:

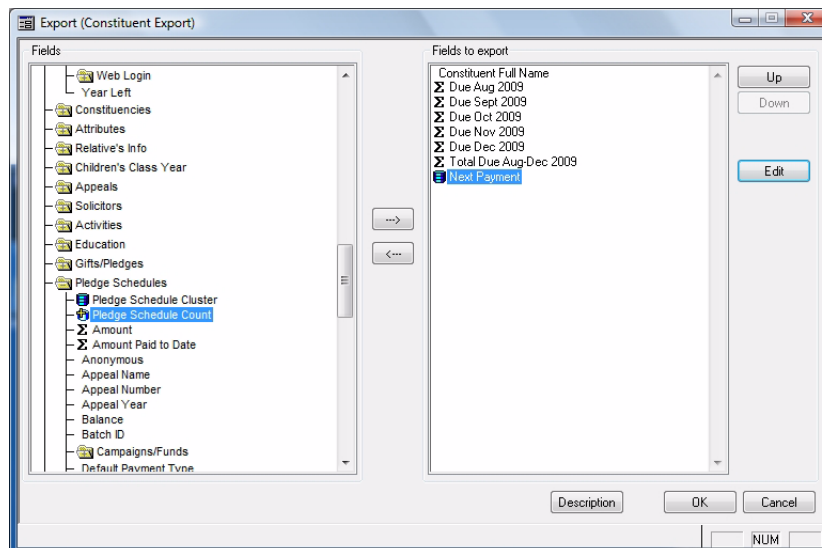
Select the fields you would like to see regarding this payment (such as Scheduled Date Due, Scheduled Amount Due, and perhaps Scheduled Original Amount, in case a previous payment has already been applied to the next outstanding payment):



The 'Parameters - Pledge Schedule Cluster' dialog box contains the following fields and options:

- Cluster Name:** Pledge Schedule Cluster
- No. of Items to Export:** 1
- No. of Giving Attributes to Export:** 1
- No. of Pledge Schedules to Export:** 1
- Query List:** outstanding payments
- Sort Conditions:** Date Due
- ☐ Use Stock Sale Amount
- ☐ Subtract Broker Fee
- Soft Credits:** Credit to Both
- ☐ Split Evenly
- ☐ Include Spousal Soft Credits
- Matching Pledges:** Credit to Both
- ☐ Include Spousal Matching Credits
- Available Columns:** Amount, Amount Paid to Date, Anonymous, Appeal Name, Appeal Number, Appeal Year, Balance, Batch ID, Campaigns/Funds (Active From Date, Active To Date, Campaign Active, Campaign Name)
- Selected Columns:** Sched. Date Due, Sched. Amount Due, Sched. Original Amount
- Buttons:** Up, Down, OK, Cancel

- Click OK to save the parameters, and rename the pledge cluster for clarity on the final export. Then click OK to save the complete export template, enter a descriptive Export Name, and click OK again.



The 'Export (Constituent Export)' dialog box contains the following fields and options:

- Fields:** Web Login, Year Left, Constituencies, Attributes, Relative's Info, Children's Class Year, Appeals, Solicitors, Activities, Education, Gifts/Pledges, Pledge Schedules (Pledge Schedule Cluster, Pledge Schedule Count, Amount, Amount Paid to Date, Anonymous, Appeal Name, Appeal Number, Appeal Year, Balance, Batch ID, Campaigns/Funds, Default Payment Type)
- Fields to export:** Constituent Full Name, Due Aug 2009, Due Sept 2009, Due Oct 2009, Due Nov 2009, Due Dec 2009, Total Due Aug-Dec 2009, Next Payment
- Buttons:** Up, Down, Edit, OK, Cancel
- Footer:** Description, NUM

Part IV in the process is to limit this export to only those constituents who currently have open pledges to the Capital Campaign, using a query at the time the export is run:

9. Select the export from the saved exports list and click the Export button. Select (or create, if necessary) a query to limit the constituents to those who have an amount due for the Capital Campaign greater than 0:

Query Parameters (Constituents - NEW)

Query Description: Has Open Capital Campaign Pledge

Report Description: Has Open Capital Campaign Pledge

Notes:

Security Level: Public

All can run.
Edit rights are restricted.

Conditions | Statistics | SQL

Add Commands | Edit Commands | Delete Commands

IN Pledge Schedules commands

- Pledge Sched Amount Due is greater than 0.00
- AND Pledge Fund Campaign Name is equal to 'Capital'

And/Or

In/Not In

()

= ()

^ v

Add Lists

OK Cancel

Click the Run button, select the desired location and file name, and then click Save to complete the export as usual. You can run the complete export, or click Cancel part way through the process to examine the output and be sure that it works as desired.

Export ID	Constituent Full Name	Due Aug 20	Due Sept	Due Oct	Due Nov	Due Dec 20	Total Due Aug-Dec	Sched. Date	Sched. Amount	Sched. Original
1	1569 Mr. Clyde Acker		5000				5000	9/30/2009	5000	5000
3	8868 Mr. Evan G. Adams					1000	1000	12/31/2009	1000	1000
4	10207 Mr. Erwin Adkins			1000			1000	10/31/2009	1000	1000
5	19770 Mr. Darell A. Ahrens					1500	1500	12/31/2009	1500	1500
6	19393 Ms. Virgie Ahrens					1000	1000	6/30/2009	100	100
7	10806 Mr. Cortez Ainsworth					5000	5000	6/30/2009	500	500
8	10841 Mr. Freddy D. Ainsworth		0			0	0	3/31/2010	250	500
9	17476 Mr. Gabriel O. Ainsworth					1000	1000	12/31/2009	1000	1000
10	5610 Mr. Lyle I. Ainsworth, '89					200	200	12/31/2009	200	200
11	19890 Miss Sondra L. Ainsworth	62.5			62.5		125	11/28/2006	62.5	62.5
12	8879 Ms. Tameka L. Ainsworth					1000	1000	12/31/2009	1000	1000

Customize Headers For My BackPack Online Giving


To allow more flexibility in the customization of your My BackPack online giving pages, you can now edit the headers for the Additional Information and Matching Gift sections, with separate headers for both the Registered and Unregistered versions of the pages, using Online Giving Setup (in a fashion similar to editing other user-viewable content for My BackPack or broadcast emails). This includes the ability to use a variety of font and format options, as well as to insert hyperlinks, which can be used, for example, to direct users to an external source to determine whether their company matches gifts (if your school subscribes to such a service).

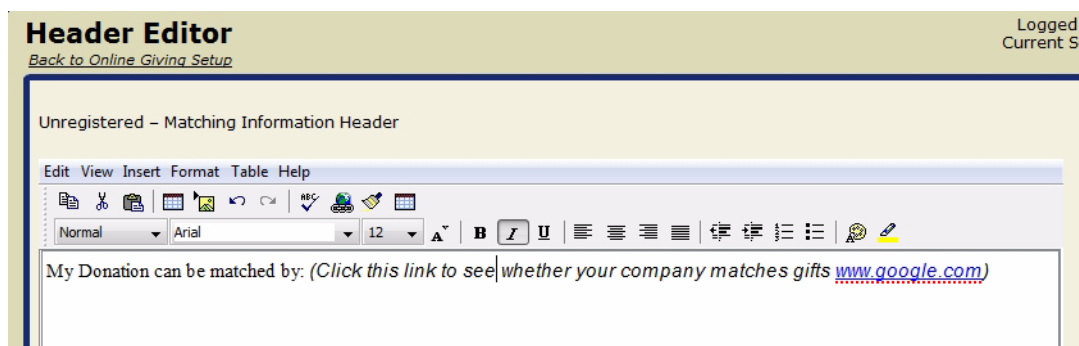
You can set the headers separately for the Registered and Unregistered versions of the online giving pages. Note, however, that both the Gift and the Pledge pages will use the same header within each one of these versions.

To customize online giving headers:

Go to Online Giving Setup under Administration in the Admin section of My BackPack.

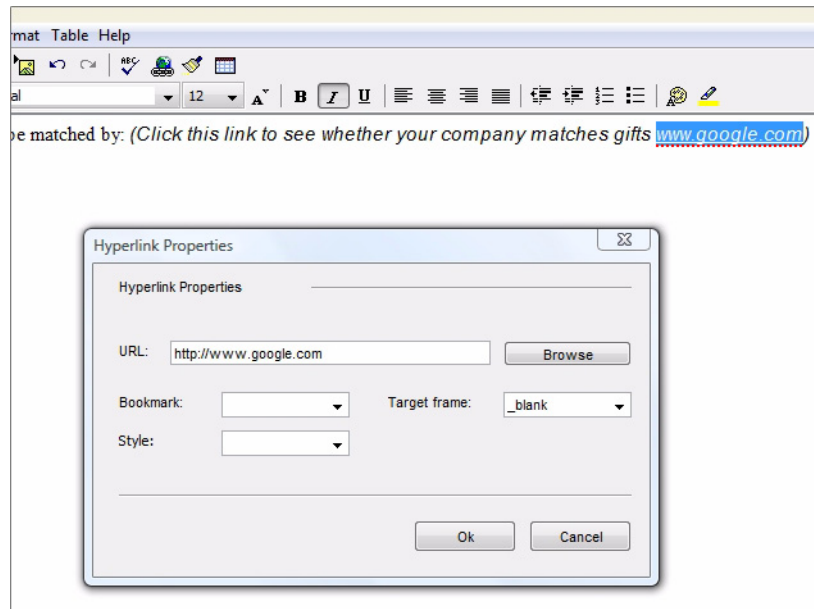


Click the  Edit icon for the type and version of the header that you want to customize (Matching Information or Additional Information, Registered or Unregistered):



Enter or edit the text for the header, using the standard word processing interface. You can control formatting, change size or font, insert images, use multiple lines, use color, etc.

If you want to use a hyperlink, enter the display text for the link, then highlight to select the text, RIGHT-click, and select Hyperlink Properties.



Enter the URL for the online resource to which you want to direct donors (we have used the Google page here as an example only), being sure to include the http://. We also recommend that you set the Target Frame to '_blank', so that this link will open in a separate window. Then click OK to save complete the link.

You can preview the final appearance of the text using the Page Preview tab at the bottom of the screen, returning to the Visual Editor tab if you need to make more changes. When everything is set the way you want, click Submit to save changes.

A screenshot of a donation form. At the top, it says "My Donation can be matched by: (Click this link to see whether your company matches gifts www.google.com)". Below this is a section for "Matched by" with a text input field. Then there are several input fields for "Address", "City", "State" (a dropdown menu), "Zip", "Country" (a dropdown menu with the text "(for non-U.S. addresses)" next to it), "Phone", "Fax", and "E-mail". At the bottom, there is a section for "Optional Information" with a text input field.

Changes to Constituent Maintenance Prospect Manager Logic

There are two changes to Constituent Maintenance to ensure that information about prospect managers (on the Prospects and Prospect Managers tabs) is entered and displayed correctly:

- Entering the same prospect manager more than once for a constituent** - Previously, you could not enter the same Prospect Manager for a constituent or spouse more than once, even for different time periods, as the program logic that prevents the entry of duplicates did not allow it. Now, you CAN enter the same Prospect Manager for a constituent as long as the date ranges do not overlap. This is helpful when, for example, the regular prospect manager is on leave or unavailable for a period of time and you want to temporarily assign someone else, or when responsibilities and roles change within your office, and the same person becomes a prospect manager again for the constituent.

From	To	Manager Name	Primary	Ask Amount	Comment
11-01-2006	12-31-2006	Dr. Dawkins Alfonso	<input checked="" type="checkbox"/>	25,000.00	
01-01-2006	10-31-2006	Mrs. Dale Acker	<input checked="" type="checkbox"/>	25,000.00	
09-01-2007		Dr. Virgie S. Albert, Ph.D., '80	<input checked="" type="checkbox"/>	25,000.00	
01-01-2007	08-31-2007	Mrs. Dale Acker	<input checked="" type="checkbox"/>	25,000.00	

Prospect Type: ☐ Display Active Only

- Display Active Only** - Previously there were some display problems when Display Active Only was checked, and the To date field for the prospect manager was null or set to a future date. This has been repaired so that a record with no To date or with a future To date is considered to be active.

From	To	Manager Name	Primary	Ask Amount	Comment
09-01-2007		Dr. Virgie S. Albert, Ph.D., '80	<input checked="" type="checkbox"/>	25,000.00	

Prospect Type: ☒ Display Active Only

Enhanced Search Capabilities (Events)

The search capabilities on the Pay Fees and Pay Sponsorship screens have been enhanced to make it easier to find the record(s) you want to work with. The Conditions section of the screen displays your current choices for field name to search, the location of text within the field, and text to search for:

Event	Sponsor	Quantity	Package Name	Date	Revenue Fund
Reunion Weekend 2009	Firefly's BBQ	1	Reunion Weekend S	02-25-2009	EVENT

To display only records that meet your criteria, you can:

- **Search on any alpha-numeric field in the table** - Click on the title of the field that you want to search. (Note that clicking on the field title also sorts the table by that field, with a triangle indicator to show whether the sort is ascending or descending, and clicking repeatedly on the field title toggles between ascending and descending search orders.)
- **Specify the text location within the field** - Use the dropdown to select "Begins With", "Contains", or "Ends With".
- **Enter the desired character(s)** to search for.

After you have specified the conditions, click the Search button to display the records. Repeat as necessary to locate the record(s) you want.

Note: To return to the complete list at any time, clear the contents of the search text box and press Enter or click the Search button again.