

Alumni Development Release Bulletin

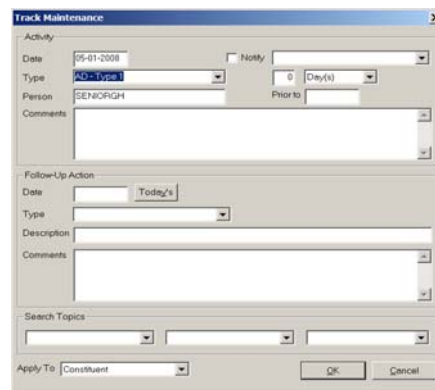
In this release bulletin, the latest enhancements to several modules of the **ALUMNI DEVELOPMENT** are described.

In This Issue

Track Maintenance Tab Enhanced for Alumni Development	p.1
New Field in Employment History Records	p.2
New Export Security Tree	p.2
Cascading Name Formatting	p.3
New Table Window Sorting Capabilities	p.4
New Save Settings Options Available	p.4
Save Fund Search Entries	p.4

Track Maintenance Tab Enhanced for Alumni Development

The Admissions and Alumni Development applications had previously shared a code table between their tracking tabs. With the new **Track Maintenance**, drop-down choices are separated by their application; therefore, values used only by **Admissions** have been removed from the list shown in the Tracking and Moves tabs.



In upcoming program releases, the Moves and Tracking lists will be separated from each other, further improving the organization of values in these lists.

New Field in History Records

A **Status** field has been added to Employment Entry window for history records. The **Status** field provides more information about the type of the affiliation beyond the capabilities of the **Active** checkbox.

The screenshot shows the 'Employment Entry' window. The 'Status' field is highlighted with a blue border. The window includes the following fields and controls:

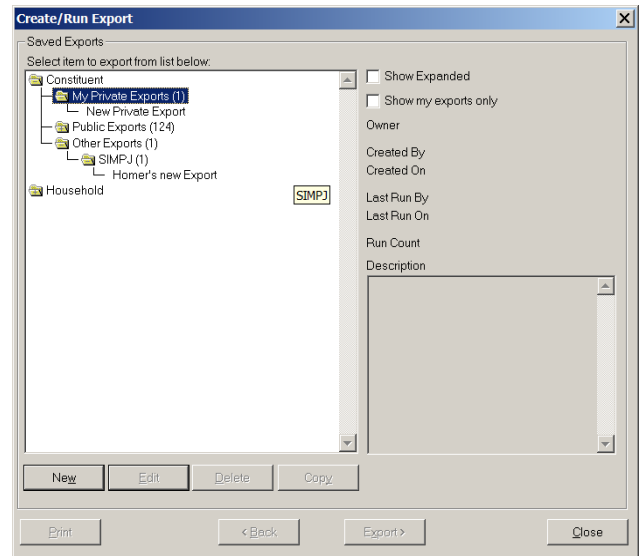
- Endeavor: Broadering Horizons (dropdown)
- Company: (text input)
- Industry: (dropdown)
- Occupation: (dropdown)
- Job Title: (dropdown)
- Department: (dropdown)
- Annual Sales: (text input)
- # Employees: (text input)
- Status: (dropdown)
- Active:
- Active From Year: (text input) To Year: (text input)
- Comments: (text area)
- Buttons: Default From Work Address, OK, Cancel

These values are user-definable and can be used for other purposes as well.

New Export Security Tree

Similar to the query system, exports can now be grouped as Public or Private.

Private Export templates will be grouped by the owner's username. Household and Constituent exports remain separate from each other, but a user may have folders listed under both modes. In general, users can use each other's exports, but will not be able to modify them. Here is an example of a security tree:



Ownership of an export template is established by clicking the **Description** button while editing a template. This will launch **the Export Name/Description** screen:

The screenshot shows the 'Export Name/Description' dialog box. It contains the following fields and controls:

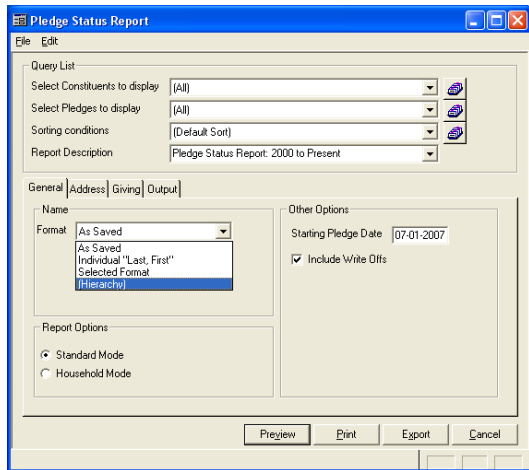
- Export Name: Homer's new Export (text input)
- Description: (text area)
- Security Level: Private (dropdown)
- Owner: SIMPJ (dropdown)
- Text: User access is restricted. Only the creator can modify.
- Buttons: OK, Cancel

Using the security level dropdown, you can establish whether a template is public or private.

Using the Owner dropdown, you can declare the owner of the template, which will also categorize the template in the main template list by the user's login name. When creating a new export, this screen appears when you first save the template.

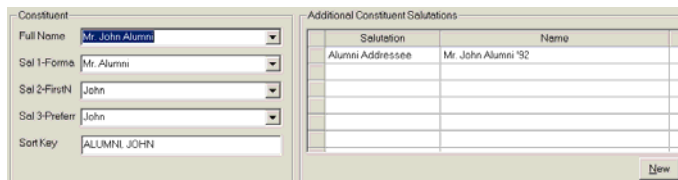
Cascading Name Formatting

A change has been made to the standard name formatting options on the **Reports** and **Mailings** menus. A new option named **Hierarchy** has been added to the **Format** drop-down list.



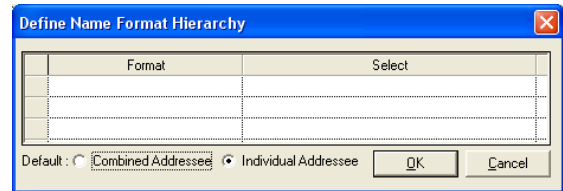
Previously, one name format was available as the 'Mailing Name' for reports, mailings and exports. Available options are the 'As Saved' name formats (Individual Addressee, Combined Addressee, and custom name formats), the 'Individual Last, First' option, or on-the-fly format generation (Selected Format). However, if the selected name format for any particular constituent did not exist or was blank, there was no way to indicate an appropriate fallback option. As of this release, you can now set up a hierarchy which will use the name formats in the order you select, cascading over missing or blank name formats.

For example, if we start with two constituents: John Alumni and Jeff Parent. Note the 'As Saved' salutations for both records:

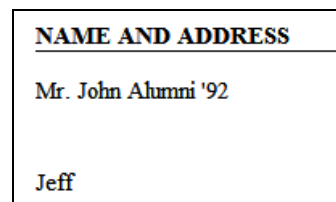


Jeff does not have an Alumni Addressee Salutation format. In previous software versions, using the **Alumni Addressee** name format selection would have resulted in Jeff being listed by his combined name format (Mr. and Mrs. Jeff Parent).

When you select (**Hierarchy**) from the drop-down menu, the Define Name Format Hierarchy screen is launched.



According to the sample configuration, we are looking to use the 'Alumni Addressee' salutation format, but if this format does not exist for a constituent contained in our report, it should then use the Individual Salutation 3 resulting as:



Since John has the 'Alumni Addressee' salutation format, it is used when his record is displayed. Since Jeff does not, his Individual Salutation 3 is displayed.

The new interface allows you to select three cascading formats, followed by a selection between Combined Addressee and Individual Addressee, both of which are stored for all constituents by default and should never be blank.

New Table Window Sorting Capabilities

Several areas within Alumni Development now allow you to sort table windows by clicking on the column header. Columns in many of these table windows can be resized or re-ordered, similar to the **Giving Detail** tab. You also now have the option to use the **Save Settings** feature on these screens by right-clicking anywhere on the screen background to retain sorting and column order preferences.

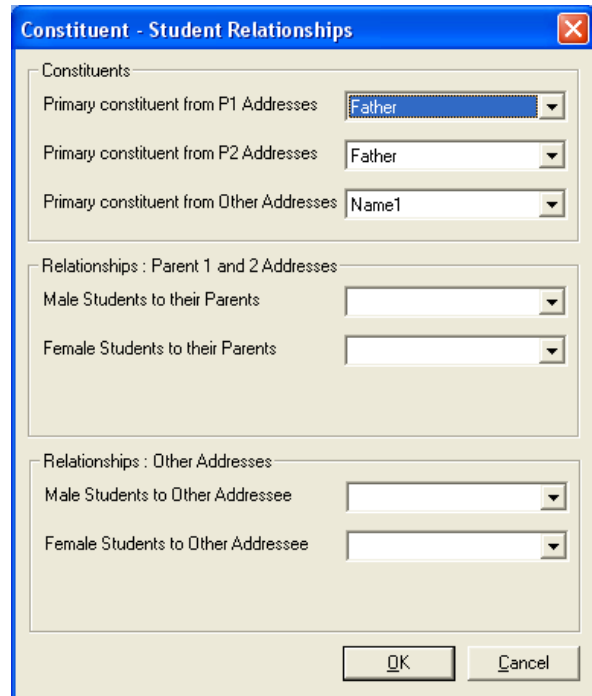
Tabs and sub-tabs with modifiable columns on the **Prospects** window are:

- **Prospect Managers**
- **Prospects**
- **Stages**
- **Assets**
- **Ratings**
- **Other Giving**
- **Interests**
- **Employment History**
- **Planned Giving**
- **Proposals**

A tab with columns that are able to be sorted, but are not resizable or re-orderable would be the **Education** tab.

New Save Settings Options Available

New families transfer now allows you to use the save settings. In the **New Families** window, after selecting an entry, click the **Transfer** button.



You can right-click anywhere on the gray background of the screen to enable the **Save Settings** option.

Save Fund Search Entries

When entering a gift or pledge, after clicking the Fund Search Rolodex, you can now save selected options, such as the sorting method and whether to display inactive funds. This is helpful when you prefer to sort the list by Fund Name rather than Fund ID.

