Alumni/Development Release Bulletin

August 2011

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About Release 92_0

In this release are several significant enhancements to Senior Alumni/Development, including a global insert/delete function for activities, enhanced handling and classification for class notes, and new options for the G/L transmittal process. There are also numerous smaller changes and enhancements, as we constantly work to improve the functionality and usability of the Senior Alumni/Development product.

As always, please contact Senior Systems Product Support if you have any questions about these changes and enhancements!

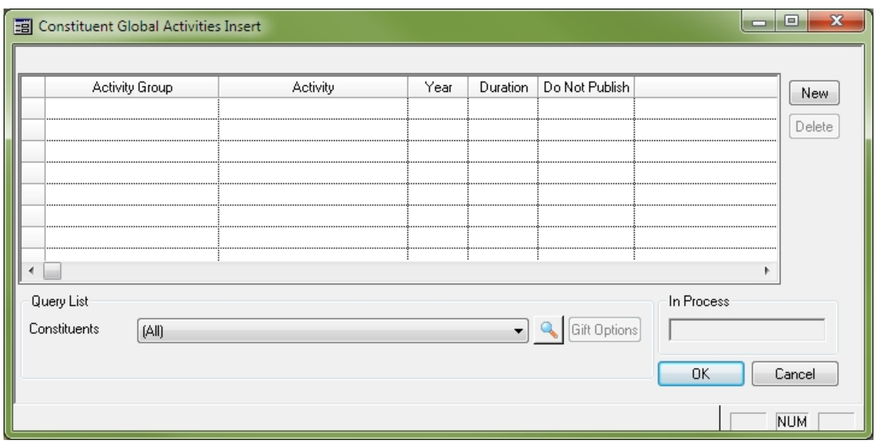
New Global Insert/Delete For Activities

You can now perform a global insert or delete for constituent activities based on a query, making it easier to quickly update groups of similar records.

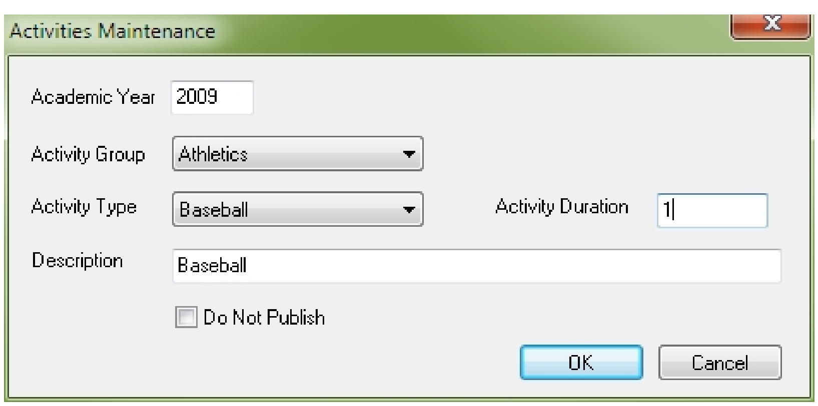
> **Note:** This function can be used to insert/delete activities for any constituent; it is not restricted to just alumni. Updates only affect the Constituent Maintenance Activities tab in Alumni/Development, and do not change any student records in Registrar.

How To Globally Insert Activities

1. Select **Maintenance > Miscellaneous > Activities Global Insert/Delete > Insert** from the main menu in the Alumni/Development application OR select **Activities Global Insert/Delete > Insert** from the dropdown on the Global button in the header of the Alumni/Development application.

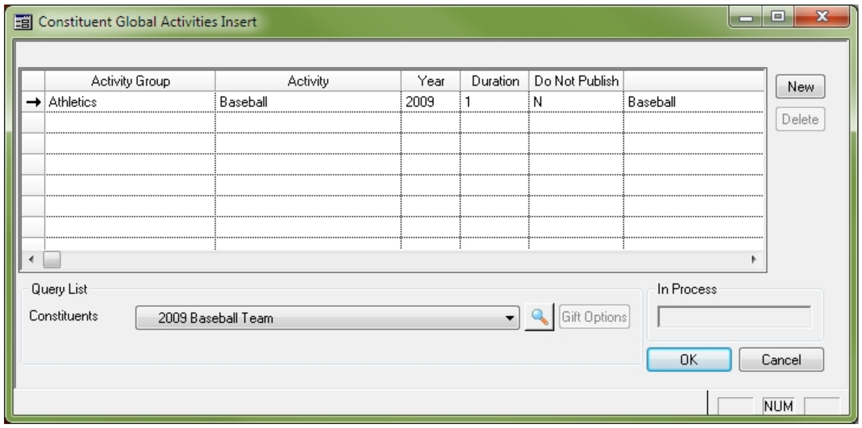


2. Add an activity to the list by clicking **NEW**, entering the activity details in the same way that you would enter them for an individual record, and clicking **OK**. If you want to insert multiple activities at once, you can repeat this step as many times as needed.



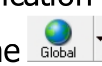
3. If you need to remove an activity from the Insert List, click on the row to select it and click **DELETE**, then **YES** to confirm.

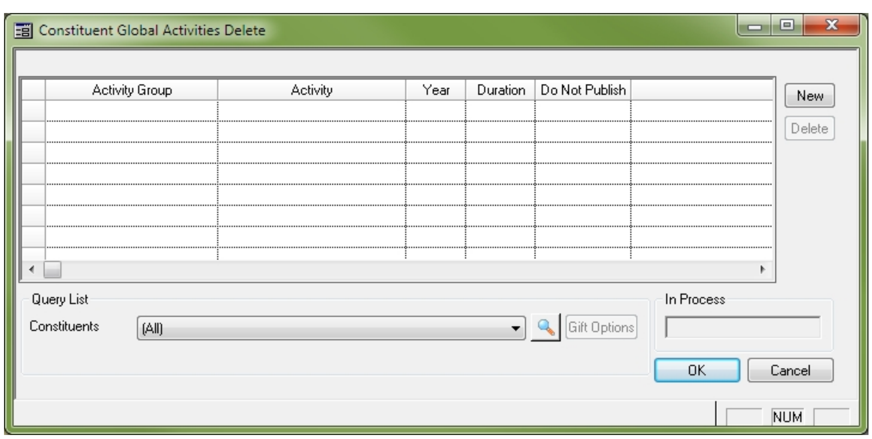
4. Select an existing query (or create a new one) to specify the exact list of constituents to update.



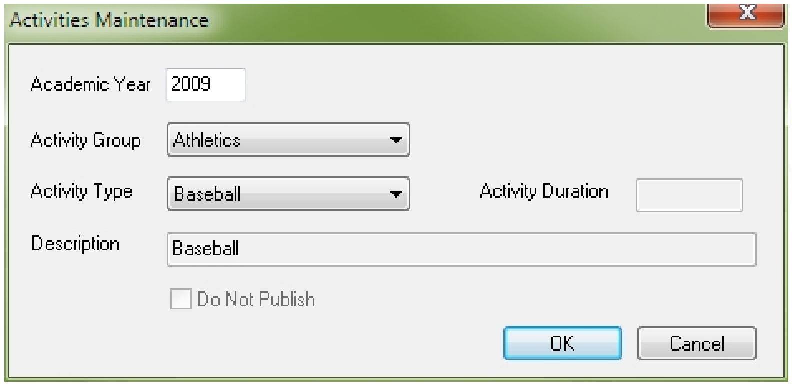
5. Click **OK** to perform the update, then click **OK** again to acknowledge the insert confirmation message. A report will automatically print with a list of all constituent activity records that were updated.

How To Globally Delete Activities

1. Select **Maintenance > Miscellaneous > Activities Global Insert/Delete > Delete** from the main menu in the Alumni/Development application OR select **Activities Global Insert/Delete > Delete** from the dropdown on the  Global button in the header of the Alumni/Development application.

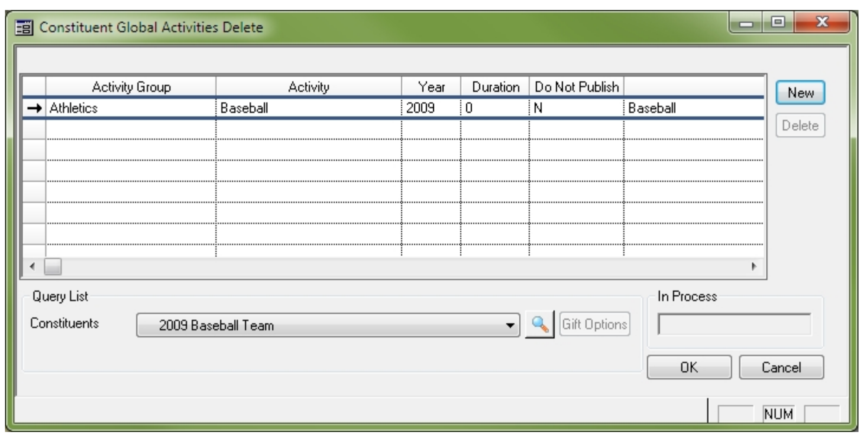


2. Add an activity to the list by clicking **New**, entering the activity details in the same way that you would enter them for an individual record, and clicking **OK**. If you want to delete multiple activities at once, you can repeat this step as many times as needed.



3. If you need to remove an activity from the Deletion List, click on the row to select it and click **Delete**, then **Yes** to confirm.

4. Select an existing query (or create a new one) to select the exact list of constituents to update.



5. Click **OK** to print the list of activity records to be deleted. Review the contents of the report to verify that you have selected the correct records, then click **Yes** to perform the update, or **No** to cancel.

6. Click **OK** to acknowledge the delete confirmation message.

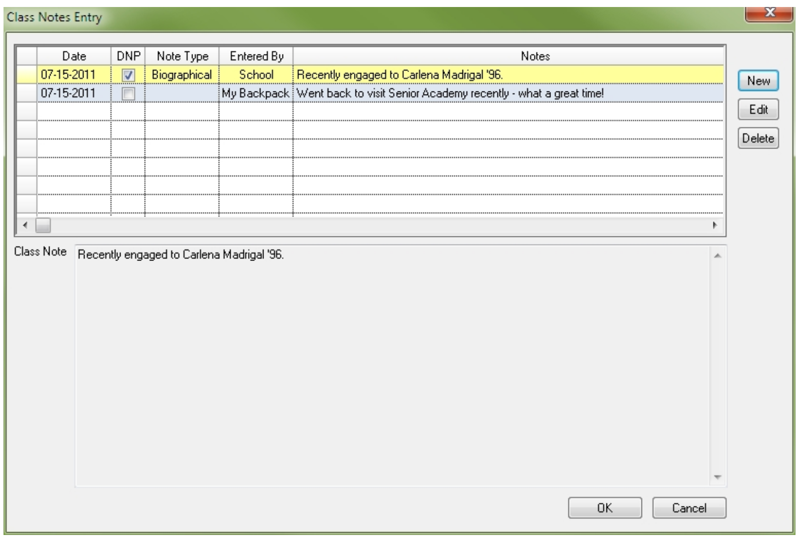
Enhanced Class Notes Handling

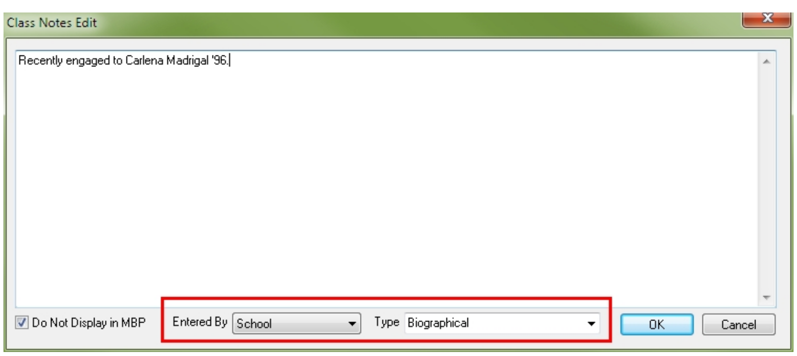
The Class Notes feature has undergone several changes and enhancements to increase usability:

Class Note Length

Previously, class notes were limited to 2000 characters. Now, notes do not have a character limit, however only the first 2000 characters of notes are searchable in My BackPack. The full text of notes is available for export, and the data entry screen in Constituent Maintenance has been expanded to better accommodate longer notes.

New Fields For Class Notes in Constituent Maintenance

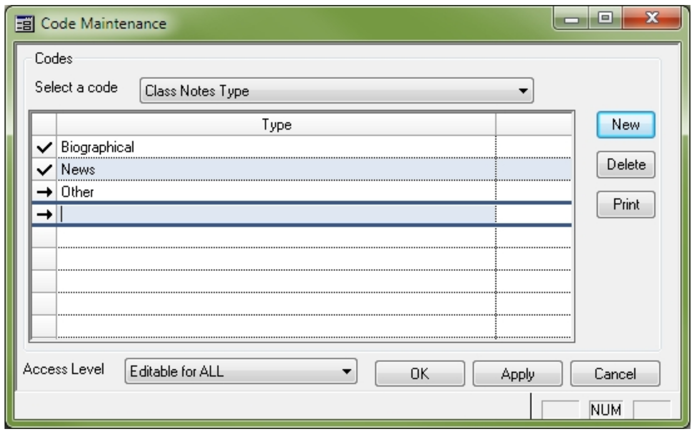




The Class Notes Edit screen has been expanded to allow for longer notes, and to include two new fields, which are also now displayed on the Class Notes Entry screen (where you maintain the list of class notes). These new fields are also available for query and export.

- **Entered By** - Any class notes entered via My BackPack are automatically set to 'My Back-Pack'. Any class notes entered via Constituent Maintenance default to 'School'. The value for this field can be changed when editing a note in Constituent Maintenance.

- **Class Note Type** - This is a new, optional field that can be used in Constituent Maintenance to categorize class notes. The values for this field can be entered and maintained via Code Maintenance in the System Administration application.



Also, the Do Not Publish checkbox has been changed to read '**Do Not Display in MBP**'. Only notes that are NOT designated as 'Do Not Display in MBP' are viewable or searchable from within My BackPack. A My BackPack user will be able to view all notes that he/she has entered (even if they are now marked as 'Do Not Display in MBP'), as well as any notes entered by the school that are <u>not</u> marked as 'Do Not Display in MBP'.

Enhancements to the Transmittal Process

A small change has been made to the options for the transmittal process for gift and pledge batches, and the header of the Transmittal screen has been re-arranged to better present all the options. You can now separately specify which information to use for the G/L Posting Reference for both the debit and the credit journal entries.

Previously, you could choose whether or not to post in 'Summary', and you could alter the Posting Reference field, if desired. When you posted in summary, the Posting Reference field was used for the G/L Posting Reference for the debit journal entries. If you did not post in summary, the debit entries would use the campaign name plus the fund name for the G/L Posting Reference. The credit entries would always use the campaign name plus the fund name for the G/L Posting Reference.

Now, you can more explicitly select the posting method from two radio buttons at the top of the screen, and then select the information you would like to use for the G/L Posting Reference field from the dropdowns to the right. You can choose to use:

- **Campaign Name + Fund Name** (note that when posting in summary, you cannot choose the 'Campaign + Fund' option for debits, since the transactions are necessarily summarized)
- **Posting Reference Below** (use the Posting Reference field on this screen, which you can edit if desired)
- **None** (system inserts a generic "Alumni Devel Gift Posting" as the G/L Posting Reference for debits and uses the campaign plus fund name for the credits)

Misc. Enhancements to Alumni/Development

The following minor enhancements and changes are also included in the 92_0 release for Alumni/Development:

Constituent Maintenance

- The label for the second (spouse) email field on an address record has changed to read 'Spouse/Secondary'.
- The Contact field (for organizational constituents), the Marital Status field, and the Spouse Name fields have all been made available on the Constituent Maintenance search screen for display and/or search.
- The Street Address is now displayed on the Company Search screen when maintaining constituent work addresses, to help in identifying the correct record for companies with multiple addresses.

Gift Import/Posting/Transmittal

- In Gift Import, you can now multi-select rows and delete all of them at once. If some items in the import have errors, you can post the items without errors. Previously, you were required to correct or delete all items with errors before posting.
- Two new fields have been added to the Comments tab in Gift Posting to record the User Name and Date/Time it was created (similar to the Last Update fields). These fields are not editable.

My BackPack

- Where available, the My BackPack Name for a fund is now used on the Giving History screen in My BackPack (as it already is on the donation screens). If the My BackPack Name field for a fund in the giving history is blank, then the regular Fund Name field is used.
- You can customize the 'From' field on email messages that are automatically sent to your staff from My BackPack when a new gift or pledge is entered online (previously the From address was just standard text reading "alumni@school.com"). This field is customized via a new 'Online Donation Email Sender' preference that can be set via My BackPack > Preferences in the System Administration application. (Note that you must logged in as the schema owner to set/change this preference.)

Fund Maintenance

- The Fund Maintenance search screen is now expandable so that you can view more information at once, and it includes new filtering and customization options.

Reports/Queries/Exports

- On reports that include constituent addresses, there is now a checkbox allowing you to optionally include email address in the address block of the report (in a similar fashion to the option for including phone number).

- The Giving Level Detail report and the Historical Giving Level report now display a sub-total for each giving level.

- There is a new **Group/Attribute** combination query option on the Attributes query node for constituent queries.

- Constituent queries and exports now include several new fields for Relationships: Relative's Board/Day, Relative's Address, Relative's Phone, and Relative's Email Address.