# Alumni/Development Release Bulletin

**April 2012**

## In this bulletin...



## About Release 92_2 Alumni/Development Features

This Release Bulletin describes the 92_2 Release changes and enhancements to the Advantage Alumni/Development products. The most notable new features in this release involve enhancements to the Constituent Media tab, including the ability to publish constituent media items to My BackPack, and to associate media items with specific gifts, tracking items, or prospect proposals. There is also a new Pledge Status Report By Date Range, and several enhancements to the Events functions, plus a few other miscellaneous changes and enhancements to existing features.

Please contact Support@senior-systems.com if you have any questions about any of these new features.

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## Alumni/Development Enhancements

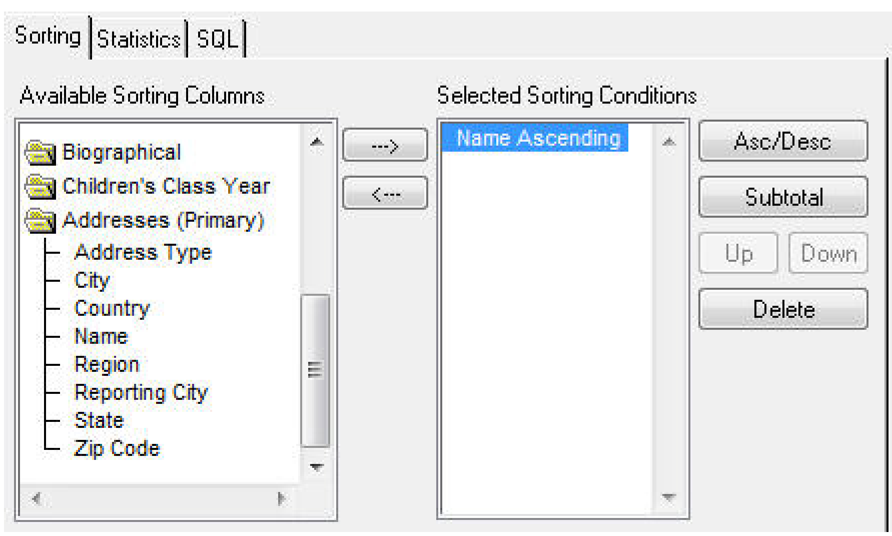
**Pledge Status Report By Date Range** - The new Pledge Status Report by Date Range gives you a quick and easy way to see the status of all pledges within a selected date range. The options for this report are very similar to those of the existing 'Pledge Status Report', with several additional options, including fields that allow you to specify a date range. See Pledge Status Report By Date Range for details.

**Events** - Several new features and enhancements have gone into the Events Application. These enhancements are designed to improve the application's usability and performance. See Events Enhancements for details.

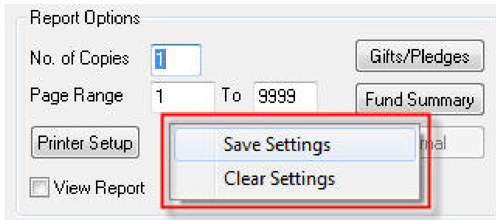
**Constituent Media** - Any media stored on the Constituent Media tab can now be published to a constituent's My BackPack account. There are several new fields for constituent media associated with this enhancement, as well as changes to media security. See Constituent Media Tab Enhancements for details.

**Code Maintenance Change - Citizenship to Country** - Previously, some schools could use a field titled 'Country' in code maintenance, while for others, the same field was titled 'Citizenship'. In order to synchronize data structure, that field is now titled 'Country' for ALL schools.

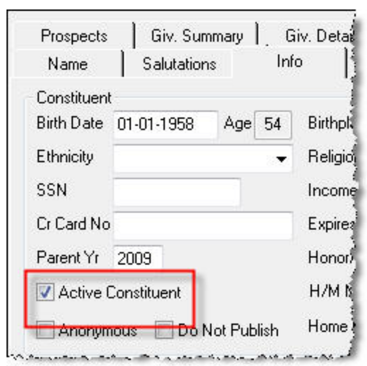
**Household Export Sorting Options** - You now have the ability to sort household exports based on the household sort key. When you add a new Sorting Conditions option (or edit an existing option), scroll to the 'Addresses' folder in the 'Available Sorting Columns' list and select 'Name'.



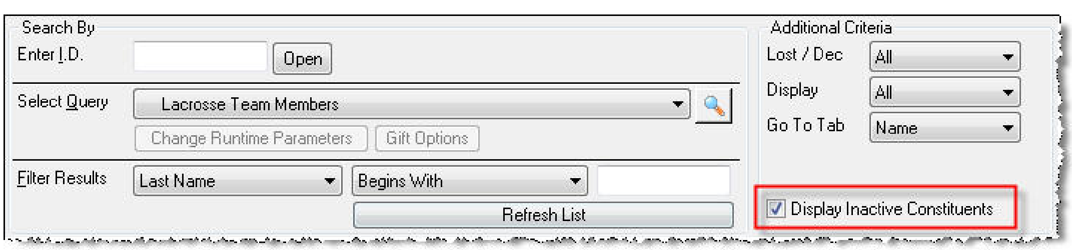
**Save/Clear Transmittal Settings** - On the Transmittal Report/Update screen (**Giving > Transmittal**), you can save your settings using the right-click context menu (or control-click on a Mac) in the header area. Next time you open the screen, your settings will be retained. You can clear your settings too, using the same right-click context menu.



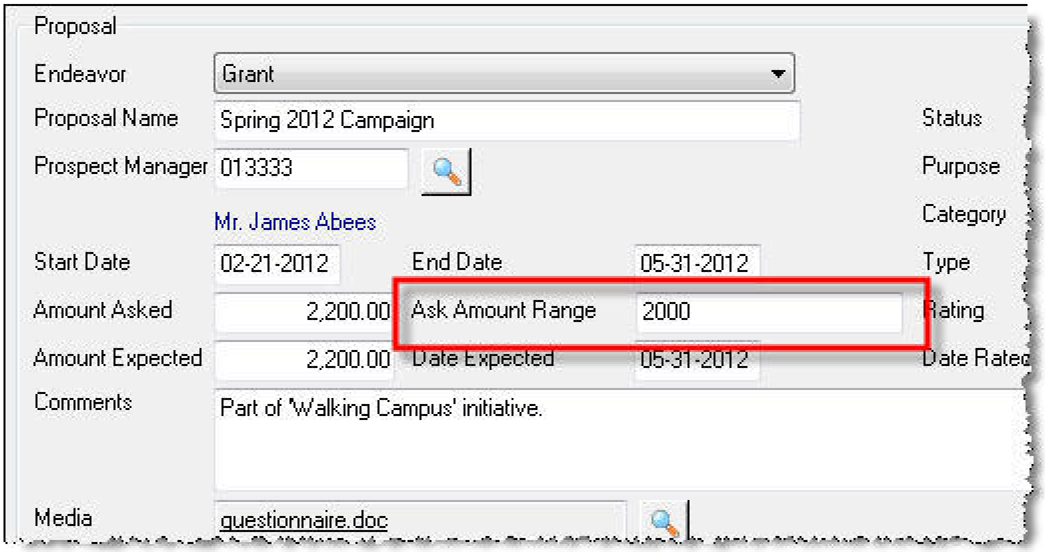

**Active/Inactive Constituents** - You can now mark constituents as 'Inactive', using a new checkbox on the Constituent Info tab. You can use this new feature as an easy way to 'hide' constituents who most likely are one-time donors without deleting the constituent's information. By default, new and existing constituents (and spouses) are marked as 'Active'. In order for a household to be marked as 'Inactive', you must clear the checkbox for both constituent and spouse. When the 'Active' checkbox is cleared, the constituent is marked as 'Inactive' on the Name tab.




You can also filter the Constituent Search screen based on the 'Active' checkbox. In the 'Additional Criteria' section of the Search screen, check the 'Display Inactive Constituents' checkbox in order to show both 'Active' and 'Inactive' constituents. Leave the box empty to 'hide' inactive constituents.



**New Proposal Field - 'Ask Amount Range'** - There is a new field on the proposal screen titled 'Ask Amount Range'. It can be used in constituent queries and exports. If you wish to use this field in a query, note that the field is formatted to use 'is equal to' or 'is not equal to' operators.



# Pledge Status Report By Date Range

The new Pledge Status Report by Date Range gives you the ability to see the status of all pledges within a selected date range. You can filter for certain funds and constituencies, outstanding pledges, write-offs, and $0 amount pledges. As with the existing Pledge Status Report, you can create, modify, and share report templates. Upon database update, all users (and user groups) with the Pledge Status Report security key will have access to the By Date Range report.

The report shows payment and write-off data both prior to and within the selected date range, so that you can see all the relevant data affecting the specified date range. (You can pick pre-defined date ranges, such as 'Calendar YTD' or 'Last fiscal year', or specify your own custom date range.) The final balance column reflects the pledge balance as of the end of your specified date range. You can view data per-fund by selecting 'Summary' format, or per-constituent by selecting 'Detail' format.

## Pledge Status Report By Date Range - Summary

**Pledge Status Report by Date Range**
Dec 2011 Pledge Status Report

*12/1/2011 to 12/31/2011*

| | | Prior To Date Range | | Within Date Range | | |
|---|---|---|---|---|---|---|
| **Fund Number** | **Pledge Amount** | **Payments** | **Written-Off** | **Payments** | **Written-Off** | **Pledge Balance** |
| ALUMNIEN | $177.00 | $20.00 | $0.00 | $102.00 | $0.00 | $55.00 |
| AUMNIAW | $1,100.00 | $0.00 | $0.00 | $200.00 | $100.00 | $800.00 |
| BOOKS | $1,153.00 | $455.00 | $0.00 | $118.00 | $400.00 | $180.00 |
| FORE!GT | $655.00 | $105.00 | $400.00 | $100.00 | $0.00 | $50.00 |
| Grand Totals: | $3,085.00 | $580.00 | $400.00 | $520.00 | $500.00 | $1,085.00 |

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## Pledge Status Report By Date Range - Detail

**Pledge Status Report by Date Range**
Dec 2011 Pledge Status Report

*12/1/2011 to 12/31/2011*

| Full Name | | | Prior To Date Range | | Within Date Range | | |
|---|---|---|---|---|---|---|---|
| Date Received | Fund Number | Pledge Amount | Payments | Written-Off | Payments | Written-Off | Pledge Balance |
| Allen Blue | | | | | | | |
| 4 West Street | | | | | | | |
| Greenville, MA | | | | | | | |
| 09/19/2011 | 888888 | $65.00 | $55.00 | $0.00 | $10.00 | $0.00 | $0.00 |
| 11/21/2011 | ALUMNIEN | $100.00 | $20.00 | $0.00 | $80.00 | $0.00 | $0.00 |
| Totals: | | $165.00 | $75.00 | $0.00 | $90.00 | $0.00 | $0.00 |
| Cassie Camden | | | | | | | |
| 11 East Ave. | | | | | | | |
| Greenville, MA | | | | | | | |
| 11/11/2011 | FORE!GT | $155.00 | $5.00 | $0.00 | $100.00 | $0.00 | $50.00 |
| 03/31/2011 | 888888 | $500.00 | $100.00 | $0.00 | $0.00 | $400.00 | $0.00 |
| Totals: | | $655.00 | $105.00 | $0.00 | $100.00 | $400.00 | $50.00 |
| Jim Jones | | | | | | | |
| 74 W. Main St. | | | | | | | |
| Martinsburg, MA | | | | | | | |
| 03/21/2011 | FORE!GT | $500.00 | $100.00 | $400.00 | $0.00 | $0.00 | $0.00 |
| 12/02/2011 | 888888 | $88.00 | $0.00 | $0.00 | $8.00 | $0.00 | $80.00 |
| 12/20/2011 | ALUMNIEN | $77.00 | $0.00 | $0.00 | $22.00 | $0.00 | $55.00 |
| Totals: | | $665.00 | $100.00 | $400.00 | $30.00 | $0.00 | $135.00 |
| Mike Manne | | | | | | | |
| 19 Oak Ln | | | | | | | |
| Martinsburg, MA | | | | | | | |
| 08/21/2011 | 888888 | $500.00 | $300.00 | $0.00 | $100.00 | $0.00 | $100.00 |
| Jack Polk | | | | | | | |
| 86 Winter Cir | | | | | | | |
| Greenville, MA | | | | | | | |
| 12/10/2012 | AUMNIAW | $1,000.00 | $0.00 | $0.00 | $200.00 | $0.00 | $800.00 |
| Sam Sanders | | | | | | | |
| 119 Sycamore St., #2B | | | | | | | |
| Martinsburg, MA | | | | | | | |
| 11/21/2011 | AUMNIAW | $100.00 | $0.00 | $0.00 | $0.00 | $100.00 | $0.00 |
| Grand Totals: | | $3,085.00 | $580.00 | $400.00 | $520.00 | $500.00 | $1,085.00 |

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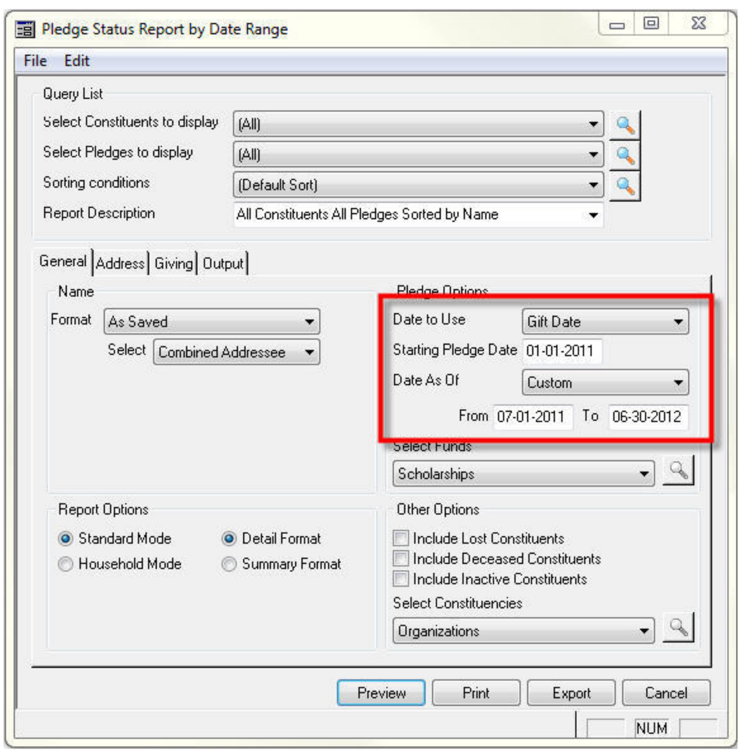
## Report Options

The options for this report are very similar to those of the existing 'Pledge Status Report', with several additional options, including fields that allow you to specify the date range from which you wish to draw data. The new options are described in detail below.

- **General Tab**

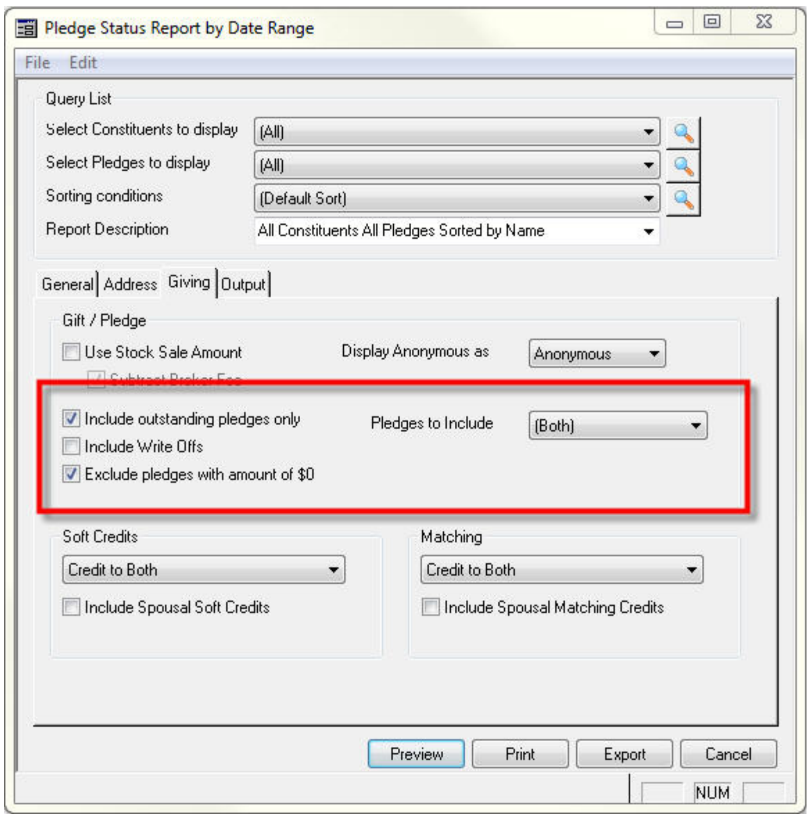
| Field | Usage/Remarks |
|---|---|
| Report Format | Detail format will show you each constituent's pledge information. Summary format will show pledge totals grouped by fund. |

| Field | Usage/Remarks |
|---|---|
| Date to Use | Select whether you want your report to return data based on the gift's date, or the date the gift was posted to General Ledger. |
| Date As Of | You can either select one of the options from the dropdown menu, or select 'Custom' and specify your own date range below. |
| From; To | These fields either show you the dates associated with your selection above, or allow you to enter your own custom date range. |
| Select Funds | You can select a specific fund you want to report on, report on 'All' funds, or select 'Some' and choose multiple funds. |
| Select Constituencies | You can select a specific constituency you want to report on, report on 'All' constituencies, or select 'Some' and choose multiple constituencies. |



- **Giving Tab**

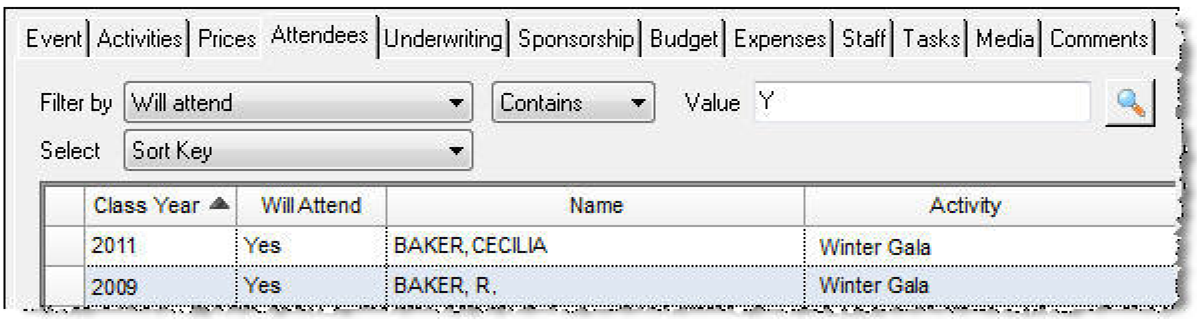
| Field | Usage/Remarks |
|---|---|
| 'Include outstanding pledges', 'Include Write Offs', 'Exclude amount $0' | These new options enable you to explicitly define what pledge data you want to see on your report. By default, these fields will exclude no data, meaning that only 'Include Write Offs' is checked. |
| Pledges to Include | You can choose whether to include Pledges, MGP Pledges (Matching Gift/Pledge), or Both. By default, both types are included. |



# Events Enhancements

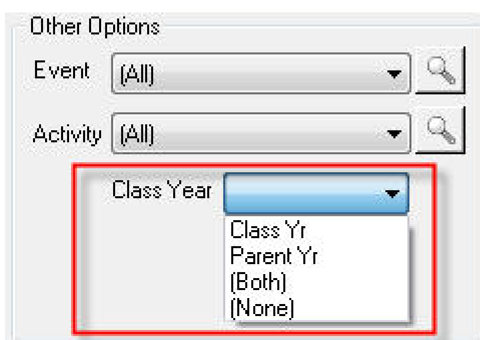
**Attendee Tab Features** - There are several new features on the Attendee tab. This tab appears in both Event Maintenance and Activity Maintenance. These enhancements are designed to make this screen more helpful and user-friendly.

- You can choose how attendee names display, by Full Name, First & Last, or Sort Key.
- There is a new search function that allows you to filter the list of attendees by several fields, including name, number of guests, and attendance.
- Finally, two new fields, 'Class Year' and 'Will Attend', are now available on the attendees grid for both Activities and Events.




**New Mail Merge Field** - A Constituent's class year is now available as a mail merge field for Event Invitations, Print Place Cards, and Print Name Tags mailings.

**New Class Year Reporting Option** - The option to include 'Class Year' has been added to the Attendance List and Seating Assignment List reports. Using the dropdown on the Options tab, you can choose to include constituents' class year, parents' class year, or both.



## Constituent Media Tab Enhancements

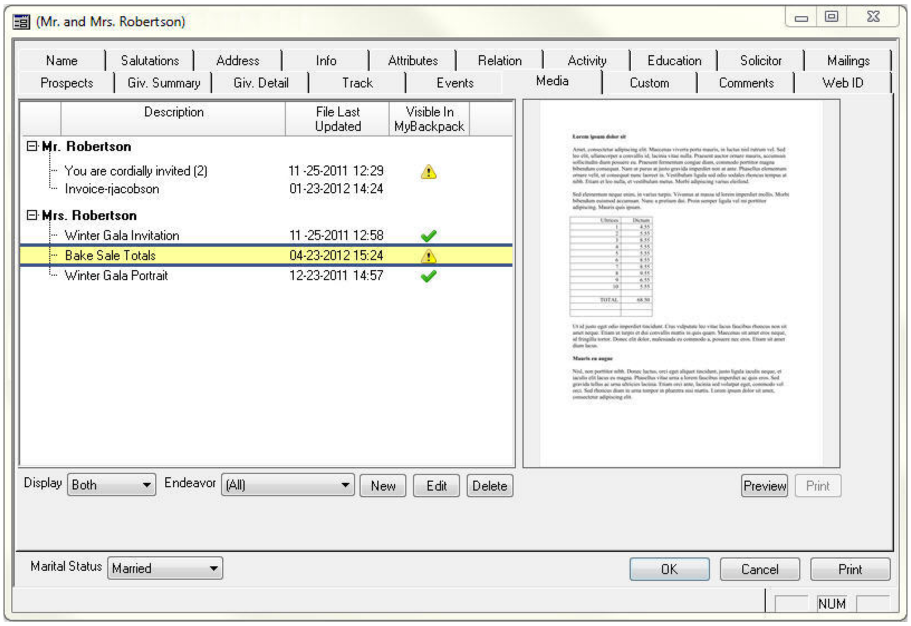
Similar to the recent redesign and enhancements for Student and Inquiry/Applicant Media tabs, the Constituent Media tab has been re-designed. As with student media, any images or documents attached here can optionally be "published" to constituents in My BackPack on the My Documents page, and the media tab shows the publishing status of each item. In addition, the detail screen for a media item has some new fields (including optional new security controls), and there is a separate tab for publishing data. See below for more details about how to use all of the new features associated with this enhancement.

> **Note:** If you intend to publish Alumni community-related documents in My BackPack, keep in mind that constituents must have a web account to access them. For current parents, this will not likely be an issue, but other constituents may not have used My BackPack previously. You can assign web accounts during new constituent processing, or you can use the Auto Assign function in System Administration. See the My BackPack Administrator's Guide (or online help for the Admin Community) for more details about how to auto-assign web accounts to constituents.

### Constituent Media Tab

The Constituent Maintenance Media tab displays all files relating specifically to the constituent(s). You can expand/contract the lists using the ⊞ or ⊟ icon next to the names to show or hide which items are available to each person. Clicking on a media item in the list displays a thumbnail preview in the right pane (for some file types), and for PDF thumbnails, you can actually scroll through the pages, and/or you can adjust the zoom by right-clicking on the image, selecting 'Zoom', and then selecting an action. There are also buttons below the thumbnail to bring up a full-size preview and/or to print the item (for appropriate file types).

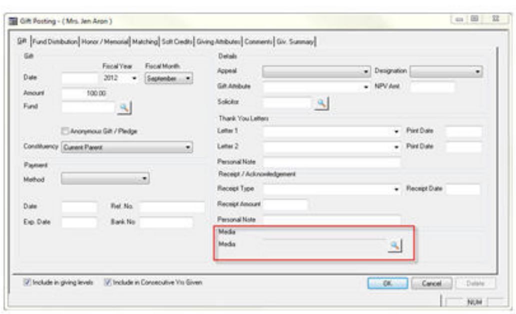
For each media item, you can see the Description, File Last Updated Date, and whether or not it is currently visible in My BackPack on the individual's My Documents page. A ✔ green check indicates that the item is published and the individual can view it in My BackPack, meaning that the document is published (for a past or current date/time) and has been made visible for the user, AND the user has a My BackPack account (note that you CAN publish to a user who doesn't yet have a My BackPack user account and he/she will automatically have access when the web account is later created). A ⚠ warning icon indicates that the item is published, but is not visible to the individual for some reason (because he/she is not a web user, or the item is published for a future date--hover over the icon to see the reason(s)). To change publishing or access for a media item, click on the row for any instance of the item to select it and then click **EDIT** (or just double-click) to access the Media Entry Details screen.

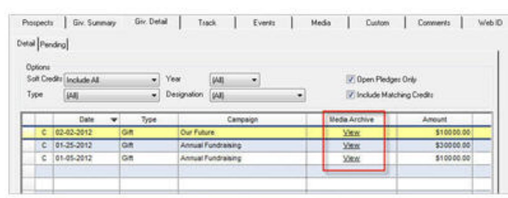



## Adding Constituent Media

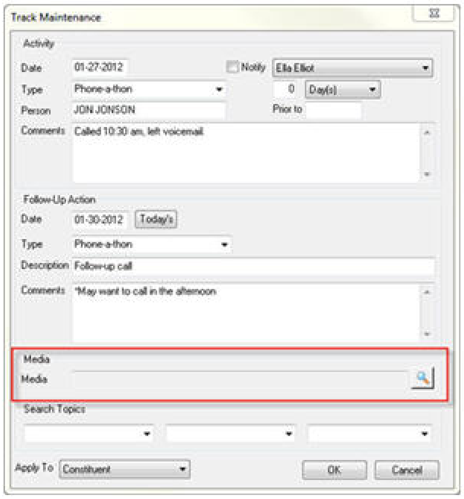
These enhancements allow for several ways for you to enter and use constituent media files.

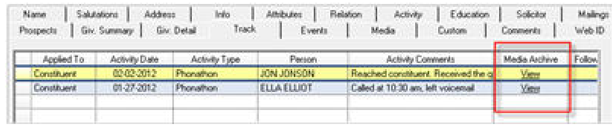
- **As part of the Gift Entry process**, you can now upload a media file to be associated with a particular gift, and with the constituent. Click the  Search icon to browse and navigate to a new file for upload and then click **OPEN**. This file will be available on the constituent's giving record, as a smart link on the constituent's giving history grid, and from the Constituent Maintenance Media tab.





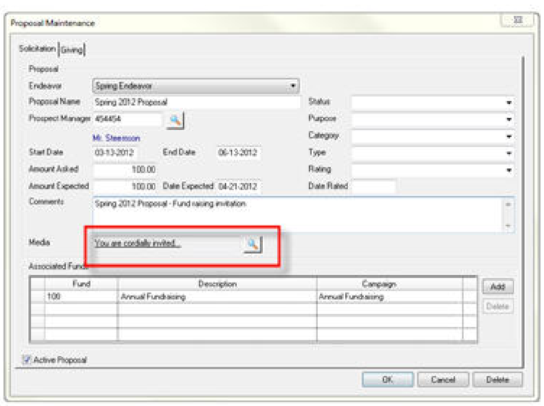
- **When entering Tracking data**, you can now upload a media file to be associated with a particular tracking entry, and with the constituent. Click the  Search icon to browse and navigate to a new file for upload and then click **OPEN**. This file will be available on the constituent's tracking record, as a smart link on the constituent's tracking history grid, and from the Constituent Maintenance Media tab.

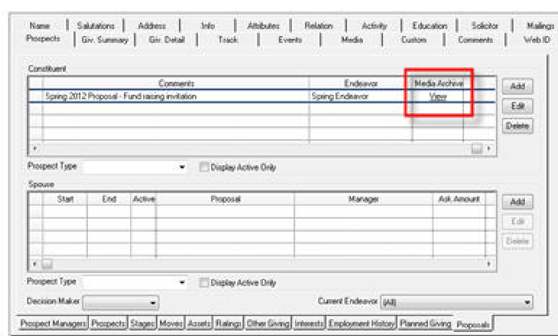




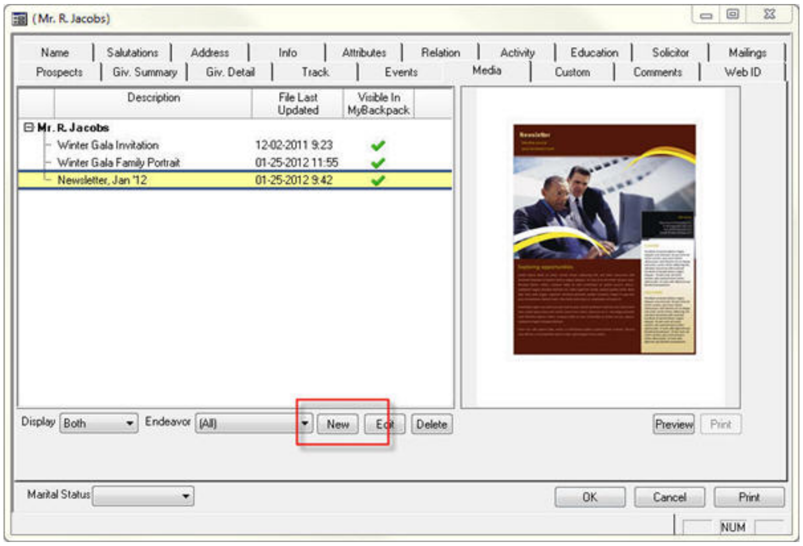
**Note:** You can apply tracking records to both a constituent and the constituent's spouse. If you use the 'Both' option and include media, that media will be applied to both the constituent and spouse. On the Media tab, you will see the media listed under both the constituent and the spouse, and any changes you make to the media will be reflected for both the constituent and the spouse.

- **When entering prospect proposal data**, you can now upload a media file to be associated with a particular prospect proposal entry, and with the constituent. Click the  Search icon to browse and navigate to a new file for upload and then click **OPEN**. This file will be available on the constituent's prospect proposal record, as a smart link on the constituent's prospect proposal grid, and from the Constituent Maintenance Media tab.





- **Directly from a constituent's media tab**, click **NEW** to add files to be associated with that constituent, independent of other areas. Note that any files uploaded via any method will appear on the constituent's media tab.

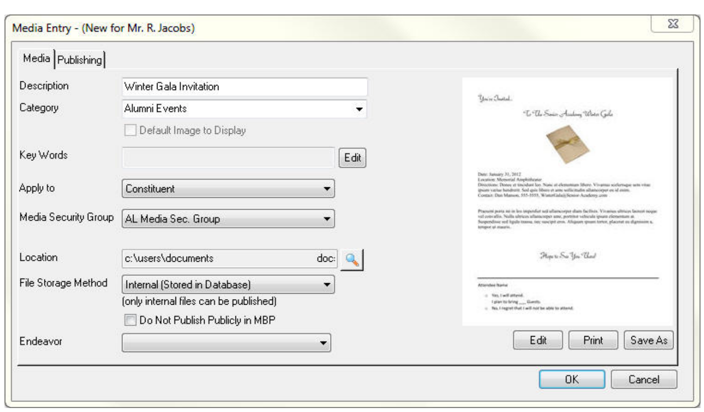



- **Using the media import tool** in the System Administration application, you can upload multiple media files to constituent records at once. See the System Administration Reference Guide for further details about the media import function.

## Constituent Media Entry Details

The Media Entry details screen, displayed when you add a new media item or edit an existing media item, has two tabs of information as well as a right pane thumbnail preview:

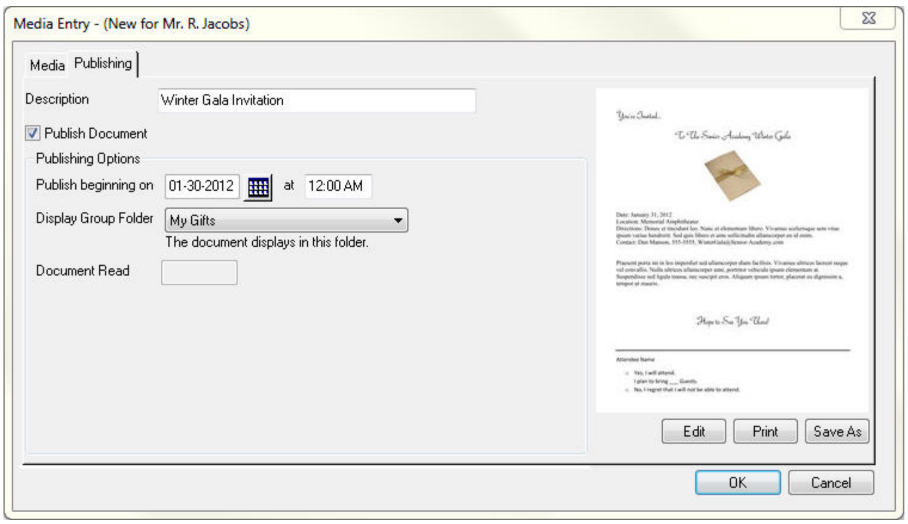
- The **Media tab** includes all of the previously existing fields for media items, with a couple of new additions, as explained in more detail below. These fields relate to the file itself and how it is controlled within the database.



| Field | Usage/Remarks |
|---|---|
| Description | Your name for this item (displayed on both Media Entry tabs); keep in mind that if this item is published in My BackPack, this is the Document Name that web users see. |
| Category | Select from the list of media categories defined for your school, if any. This list of categories can be maintained via Code Maintenance in the System Administration application. |
| Default Image to Display | Use this checkbox to indicate that you want the media file to appear as the individual's default image. |
| Key Words | If you wish to list key words, click **EDIT** to the right of the field, enter or edit the list of key words, and then click **OK**. |
| Apply to | Indicates whether this item is associated with the Constituent or Spouse. For best results, do not change this field after initially uploading the file. |
| Media Security Group | You can assign one or more media security groups to limit internal access to this item to specific user groups. You can select a single group or 'All' from the dropdown, OR select 'Some' or click the Search icon to select multiple groups from the list. See the discussion about media security below for more details about setting up groups. |
| Location | This displays the location from which the file was uploaded. Click the Search icon to browse and navigate to a new file for upload and then click **OPEN**. If you upload a new file for an existing media item, the prior version will automatically be replaced with the new upload. |
| File Storage Method | The storage method indicates whether or not the media file itself is stored as part of the database or externally on your network. (Previously, all image files were stored internally, and all other media files were stored externally.) If you plan to publish this file to My BackPack, you will need to select the 'Internal' option. You can change this field at any time to change the storage method (and effectively copy the file to the database or to the network media location). |
| Endeavor | Use this field to associate the media item with a particular endeavor. |

**Note:** With the exception of tracking media, there is a one-to-one ratio between a file and a constituent. For best results, do not apply one file to multiple individuals. If a constituent record is split or otherwise changed, the file resides with the original file owner and is no longer associated with the second individual. If you would like to make a file available to the entire Alumni community, consider using the community page customization enhancement, described in the All Applications Release Bulletin 92_0.

- The **Publishing tab** is all new, and contains fields related only to publishing the item in My BackPack. If you do not publish any media items to My BackPack, you do not need to use this tab.




| Field | Usage/Remarks |
|---|---|
| Description | Your name for this item (displayed on both Media Entry tabs); keep in mind that if this item is published in My BackPack, this is the Document Name that web users see. |
| Publish Document | Check this box to "publish" this document to My BackPack, or un-check it to "un-publish" the document. Published documents are displayed in My BackPack on the My Documents page for each user. |
| Publish Beginning On | If you want to control when the document becomes available in My BackPack, you can enter a future start date and time; otherwise, this field defaults to the current date and time for immediate availability. |

| Field | Usage/Remarks |
|---|---|
| Display Group Folder | On the My Documents page in My BackPack, you can optionally group constituent-related documents into folders for better organization. See the discussion about how to control publishing to My BackPack in a following section for more details about document folder setup and maintenance. If you do not specify a Display Group Folder, you will receive a warning message when you click **OK** to save the media entry, indicating that the document will be listed at the root level for the user. |

- The **right pane preview** includes buttons that allow you to **EDIT** the actual media item (if possible, based on the file type and the programs available on your system--e.g. you can edit a Microsoft Word document with the MS Word program), **PRINT** (where applicable), or download a copy to your computer or network using **SAVE AS**.


## Editing Constituent Media

Once a media file has been saved to a constituent's record, via gift entry, tracking, direct upload to the media tab, or media import, it is possible for a database user to edit the media file on two conditions: the user must have the appropriate security permissions, and the user must have access to the appropriate program to edit the desired file type.

> **IMPORTANT:** Before opening a file for editing, you may need to close all other instances of the program you plan to use if you are already running that program. Otherwise, due to the behavior of some external applications, you may encounter difficulty saving changes to media files stored within your database. For example, if you plan to edit a MS Word file and you already have MS Word open on your computer, you should close all MS Word windows before opening the media file for editing.

To edit a file stored within the database, open the Media Entry screen (from the constituent's media tab). If you are able to edit the file based on your security permissions and the programs available on your local machine, the **EDIT** button will appear below the file preview pane. The **EDIT** button automatically launches the appropriate program and allows you to edit the file. To save your changes, click the program's Save icon or click **File > Save**. You may also encounter a dialog asking if you wish to update the document archive. Click **YES** to save changes to the file within your database.

> **IMPORTANT:** DO NOT use Save As or attempt to save in a different location or file folder! If you do so, your changes will NOT be saved in your database.

## Changes to Media-Related Security Keys for Database Users

Media security for Alumni/Development database users can be controlled by a combination of security keys managed in the System Administration application, per user or per user group, and media security groups.

- **Media security keys** - There are three security keys in Alumni Development that control database users' ability to view and edit media.

  **Media** - Allows the user to add media to a constituent's record. Users with only the Media key (with none of the media sub-keys) will have read-only access to media files.

  **Edit Media Information** - Allows the user to edit a media item's settings. Users with this key will be able to edit media file settings on the Media Entry and Publishing tabs.

  **Modify Saved Media Document** - Allows the user to edit the media item itself (for example, to edit the text of a MS Word document).

  Upon database update, any user (or user group) with the Media key and Edit sub-key automatically receives the two new media security keys. Users (or user groups) with only the Media key before database update will not receive the new media security keys.

- **Media Security Groups** - Media security groups can be managed within the Alumni application, under **Maintenance > Prospect Management > Media Groups**. Each media security group can include one or more users (from User Maintenance in System Administration). Once you create your media security groups, you can assign one or more media security group(s) to a specific media item on the Media Entry Details Media tab. Then, only the user(s) in the selected group(s) will have access to the media item.

**Note:** See the Alumni/Development Reference Guide for details about creating Media Security Groups for constituent media.

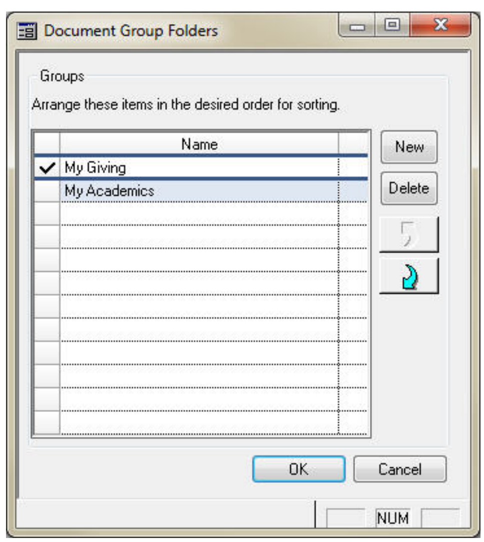
## Publishing Alumni/Development Documents to My BackPack

Step 1 - [Optional] Document Folders Setup:

If you want to be able to organize documents into different folders for ease of presentation and user navigation, you will need to set up those document group folders ahead of time. Then, at the time of document publishing, you can determine in which folder the document should appear. Keep in mind that you can add new folders later, so you don't have to decide on the entire list in advance.

To set up or maintain document group folders for My BackPack:

1. Select **Documents > Group Folder Maintenance** from the main menu in the System Administration application.



2. **To add or edit document group folders**, create or select the document group folder to work with:

    - **To add a new document group folder**, click **NEW**. Type the Name into the new blank row in the table.
    - **To edit a document group folder**, click on the row to select it. You can then edit the Name field, or use the  Up and  Down buttons to move it to a different location in the display sequence.
    - Click **OK** to save changes.

3. **To remove a document group folder**, click on the row to select it and click **DELETE**. Then click **YES** to confirm.

> **Note:** If you click **DELETE** and there are documents currently published to that folder, you will receive a warning that those documents will be moved to the root level for all affected users. You can then choose to continue with the operation or cancel.

Step 2 - Make Specific Documents Available in My BackPack:

All publishing and user access controls for a media file are found on the Publishing tab of the Media Entry Details screen. To publish a document (or modify a document's publishing settings), open the Constituent Media tab, select to edit an existing item from the list, and change the settings as needed on the Publishing tab of the Media Entry Details screen (at least to check the 'Published' box for the item). Unless you selected to publish for a future date and time, the document(s) will then be available to the constituent in My BackPack.

## Viewing Documents in My BackPack

My BackPack users can access their published documents via the My Documents link on their My BackPack landing page. There is a table for constituent documents that is always visible on the My Documents screen. The user can toggle the display for this table between list and folder view. Any "unread" documents will display in bold (and the number of unread documents will appear in parentheses on the landing page next to the My Documents menu item, so users know to check the page). Clicking on a document name opens the document in a separate tab/window where possible; users can download a document using the right-click context menu for Windows or Mac. Some users who are members of other My BackPack communities (such as parents and teachers) may already be familiar with using the My Documents page.

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## List View:


## Folder View: