



E-Mail Addresses in Senior Systems

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In older versions of the **SENIOR SYSTEMS** modules, we included a simple field for e-mail addresses. As more communication between schools, parents, and constituents is done over the Internet, we needed to improve the e-mail functionality. In this release bulletin, we will explain in detail how we have changed the way the system stores and transfers e-mail addresses.

Why was a change necessary?

Before Release 90_3, each mailing address in **SENIOR SYSTEMS** allowed the entry of two e-mail addresses: E-Mail 1 and E-Mail 2. In those builds, the system did not associate either address with a specific member of the household.

This was a problem for schools using **ALUMNI/DEVELOPMENT** in conjunction with other **SENIOR SYSTEMS** modules (**ADMISSIONS**, **REGISTRAR**, or **ACCOUNTS RECEIVABLE**). In the latter modules, E-Mail 1 was typically used for the male member of the couple (Figure 1), while in **ALUMNI/DEVELOPMENT** it was used for the primary addressee, who might be the female (Figure 2).

Address Maintenance - (Mr. and Dr. Troy P. Michaelidis)

Parent/Guardian | Address | General | Comments

Mailing Address

Name: Mr. and Dr. Troy P. Michaelidis

Line 1: 530 South State Street

Line 2:

Line 3:

City/State/Zip: Ann Arbor MI 48109

Country: USA Region: Great Lake

Sort Key: MICHAELIDIS, ADRIA TROY

Reporting City/Town: Ann Arbor

Telephone Numbers

Tel. No.: (734) 622-8233

Fax No.:

E-Mail 1: troym@aol.com

E-Mail 2: adriam@aol.com

Bill Codes

A/R: Original

Loans:

Do Not Publish Address Do Not Display in My BackPack

Parent 1

OK Cancel Delete

Figure 1: E-Mail Addresses in Parent 1 Address

Single mother households also presented a challenge for the same reason. For consistency, the mother's e-mail address would be stored in the E-Mail 2 field of **ADMISSIONS**, **REGISTRAR**, and **ACCOUNTS RECEIVABLE**. Since a single mother would be the primary constituent, however, the e-mail address was stored in the E-Mail 1 field of **ALUMNI/DEVELOPMENT**.

Another problem was that some households had only one e-mail address, and no attention was paid to whose address it was.

The screenshot shows a software window titled "Address Maintenance - (Adria and Troy Michaelidis)". It has a tabbed interface with "Address", "General", "Attributes", and "Comments" tabs. The "Address" tab is active, showing a "Mailing Address" section with fields for Name (Adria and Troy Michaelidis), Line 1 (530 South State Street), Line 2, Line 3, City/St/Zip (Ann Arbor MI 48109), Country (USA), Region (Great Lake), Sort Key (MICHAELIDIS, ADRIA TROY), and Reporting City/Town (Ann Arbor). There is a "DNP" checkbox checked. To the right is a "Telephone Numbers" section with fields for Tel. No. ([734] 622-8233), Fax No., and two E-Mail fields (E-Mail 1: adriam@aol.com, E-Mail 2: troym@aol.com). At the bottom left, a "Constituent Main" button is highlighted with a blue box. At the bottom right are "OK", "Cancel", and "Delete" buttons. There are also checkboxes for "Do Not Publish Address" and "Do Not Display in My BackPack".

Figure 2: E-Mail Addresses in Constituent Main Address

If your school only uses **ADMISSIONS**, **REGISTRAR**, or **ACCOUNTS RECEIVABLE**, you only need to read pages 2–5 and 7–10.

Updating to 90_3

To improve the systems' use of e-mail addresses, we have made significant changes that should account for various family situations. When you install the 90_3 build of **SENIOR SYSTEMS**, you will notice differences in address-related functions.

Obviously, we wanted to preserve your data through this transition. Our team of developers needed to move data within the tables that constitute the screens that you see. In this release bulletin, we will explain the conditions determining these moves. We will also help you understand the changes you need to make to records, Export templates, and Crystal Reports in order to take advantage of these improvements.

Original Screens

Figure 3 is an example from a 90_2 release of **ALUMNI DEVELOPMENT**. You can see that Troy and Adria Michaelidis are parents. Adria also happens to be a graduate of the school, and so the school has chosen to make her the Primary constituent, while Troy is listed as the spouse.

The screenshot shows a software window titled "Constituent Maintenance - (Adria and Troy Michaelidis)". It has a menu bar with "Mailings", "Prospects", "Giv. Summary", "Giv. Detail", "Track", "Media", "Custom", "Comments", and "Web ID". Below the menu bar are tabs for "Name", "Salutations", "Address", "Info", "Attributes", "Relation", "Activity", "Education", and "Solicitor". The "Name" tab is active, showing two main sections: "Constituent" and "Spouse".

Constituent Information:
 I.D.: 0000052 (Assign)
 Title: Dr. (dropdown)
 First: Adria, Pref: Adria
 Middle: Helen
 Last: Michaelidis, Suffix: PhD (dropdown)
 Maiden: Paraskevas, Gender: F (dropdown)

| Constituency | Pri | From | To | Add | Delete |
|--------------|-------------------------------------|------|----|-----|--------|
| Parent | <input checked="" type="checkbox"/> | | | | |
| Alum | <input type="checkbox"/> | | | | |

Class Yr: 1992, Admiss Yr: 1980, Yr Left: (dropdown), Grad Y: (dropdown) 1
 School: YSHS (dropdown)

Giving Level: Life Founder's Circle (dropdown), Student (checkbox)

Spouse Information:
 I.D.: 0000053 (Assign)
 Title: Mr. (dropdown)
 First: Troy, Pref: Troy
 Middle: Paulo
 Last: Michaelidis, Suffix: (dropdown)
 Maiden: (dropdown), Gender: M (dropdown)

| Constituency | Pri | From | To | Add | Delete |
|--------------|-------------------------------------|------|----|-----|--------|
| Parent | <input checked="" type="checkbox"/> | | | | |
| Alum Spouse | <input type="checkbox"/> | | | | |

Class Yr: (dropdown), Admiss Yr: (dropdown), Yr Left: (dropdown), Grad: (dropdown) 1
 School: (dropdown)

Giving Level: (dropdown), Student (checkbox)

Marital Status: Married (dropdown)

Buttons: OK, Cancel, Print, NUM

Figure 3: Constituent Maintenance, Name Tab

When their address is viewed from a student record (in **ACCOUNTS RECEIVABLE** or **REGISTRAR**), Troy is correctly listed as the Father and Adria as the Mother.

The screenshot shows a software window titled "Address Maintenance - (Mr. and Dr. Troy P. Michaelidis)". It has tabs for "Parent/Guardian", "Address", "General", and "Comments". The "Parent/Guardian" tab is active, showing two main sections: "Father" and "Mother".

Father Information:
 Title: Mr. (dropdown)
 First: Troy
 Middle: Paulo
 Last: Michaelidis
 Suffix: (dropdown)
 Preferred: Troy
 Relation: (dropdown)
 SSN: (dropdown)

Web I.D.: MICTR0001

Mother Information:
 Title: Dr. (dropdown)
 First: Adria
 Middle: Helen
 Last: Michaelidis
 Suffix: PhD (dropdown)
 Preferred: Adria
 Relation: (dropdown)
 SSN: (dropdown)

Web I.D.: MICAD0001

Full Name: Mr. and Dr. Troy P. Michaelidis (dropdown) Custody

Parent 1 (dropdown)

Buttons: OK, Cancel, Delete

Figure 4: Address Maintenance, Parent/Guardian Tab

In this Parent 1 address, the E-Mail 1 field holds the father's e-mail address (troy@m@aol.com) and E-Mail 2 is used for the mother (adriam@aol.com); see Figure 5.

Address Maintenance - (Mr. and Dr. Troy P. Michaelidis)

Parent/Guardian | Address | General | Comments

Mailing Address

Name: Mr. and Dr. Troy P. Michaelidis

Line 1: 530 South State Street

Line 2:

Line 3:

City/St/Zip: Ann Arbor MI 48109

Country: USA Region: Great Lake

Sort Key: MICHAELIDIS, ADRIA TROY

Reporting City/Town: Ann Arbor

Telephone Numbers:

Tel. No.: (734) 622-8233

Fax No.:

E-Mail 1: troy@aol.com

E-Mail 2: adriam@aol.com

Bill Codes:

A/R: Original

Loans:

Do Not Publish this Address record Do Not Display in My BackPack

Parent 1 Do Not Publish flags are used to determine whether to publish the corresponding field's data in Reports, Mail Merge and Export data files.

OK Cancel Delete

Figure 5: E-Mail Addresses in Parent 1 Address Maintenance, Address Tab

Because the address is shared with **ALUMNI/DEVELOPMENT**, the addresses appear in the same order in that module (Figure 6).

Address Maintenance - (Adria and Troy Michaelidis)

Address | General | Attributes | Comments

Mailing Address

Name: Adria and Troy Michaelidis

Line 1: 530 South State Street

Line 2:

Line 3:

City/St/Zip: Ann Arbor MI 48109

Country: USA Region: Great Lake

Sort Key: MICHAELIDIS, ADRIA TROY

Reporting City/Town: Ann Arbor

Telephone Numbers:

Tel. No.: (734) 622-8233

Fax No.:

E-Mail 1: troy@aol.com

E-Mail 2: adriam@aol.com

Do Not Publish this Address record Do Not Display in My BackPack

Constituent Main Do Not Publish flags are used to determine whether to publish the corresponding field's data in Reports, Mail Merge and Export data files.

OK Cancel Delete

Figure 6: E-Mail Addresses in Constituent Main Address Maintenance, Address Tab

Screen Changes

In the 90_3 program build, we have enhanced the e-mail fields' functionality. The information is arranged differently and, more importantly, the e-mail addresses are linked directly to one of the addresses. This is clear in all modules, although the labels are slightly different in **ALUMNI/DEVELOPMENT**.

Figure 7: E-Mails areas in Parent 1 and Constituent Main addresses

Because the e-mail addresses are associated with specific people at the address, they appear in the appropriate positions. Adria's e-mail address is located in the Mother field in **ADMISSIONS**, **REGISTRAR**, and **ACCOUNTS RECEIVABLE**, and in the top slot (primary constituent) position in **ALUMNI/DEVELOPMENT**. To make this very clear to the user, the latter module's addresses use the constituent names for the labels.

Exports

Once your school has upgraded to Build 90_3, you will notice that some export items have changed to reflect the new terminology.

Constituent Mode Exports

In **ALUMNI/DEVELOPMENT** exports, the E-Mail 1 and E-Mail 2 address fields have changed. The field names vary based on the mode you have selected. When you're using the Constituent mode, the export items are named Constituent/Work E-Mail 1 and Spouse/Work E-Mail 2.

Since work addresses have always been linked only to the employee (i.e., Constituent or Spouse), both e-mail address fields available in Work addresses are linked to the constituent (Constituent Work) or spouse (Spouse Work) as appropriate. The changes we've made in the 90_3 release only apply to Constituent Main, Parent 1, Parent 2, and Other address records.

There are also two additional fields: E-Mail (Combined) and E-Mail (Household).

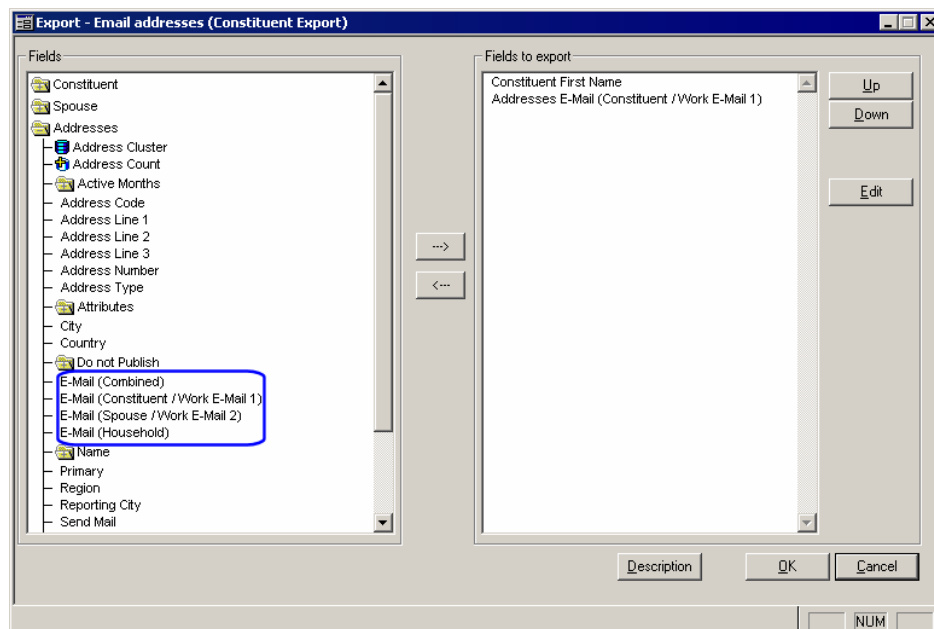


Figure 8: E-mail address fields in Constituent Export

When you use e-mail items in Constituent exports, the constituent e-mail will always refer to the constituent of the record—the one who meets the criteria defined in your query. The other member of the household is considered the spouse, regardless of whether the constituent is primary or secondary.

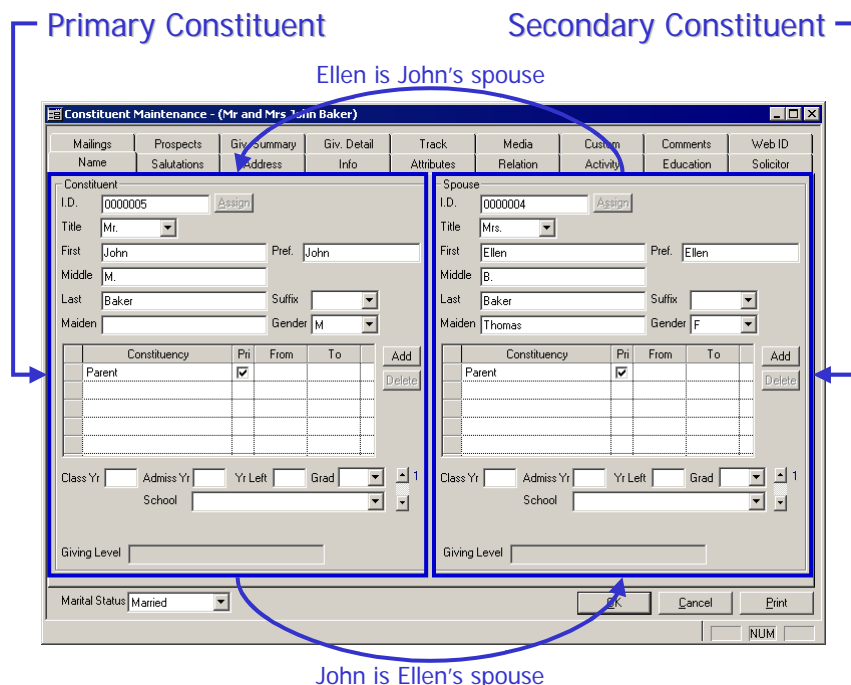


Figure 9: Relationships between primary and secondary constituents

In previous releases, you would have had to use the both e-mail address fields, even in Constituent mode, to be sure you had the correct e-mail address in the export file for primary and secondary constituents. The system did not know which e-mail from the address record applied to what constituent.

Now, because the database knows which address is the constituent's and which is the spouse's, the correct e-mail will appear when you use the Constituent mode to export any constituent records. You can see this in the following example of an Excel file built from an export.

| | A | B | C | D | E | F |
|---|------------------|-------------------------------|----------------------------------|-----------------------------|------------------------------|---------------------------|
| 1 | Export ID | Constituent First Name | Constituent/Work E-Mail 1 | Spouse/Work E-Mail 2 | E-Mail (Combined) | E-Mail (Household) |
| 2 | 59 | Adria | adriam@aol.com | troym@aol.com | adriam@aol.com;troym@aol.com | adriam@aol.com |
| 3 | 60 | Troy | troym@aol.com | adriam@aol.com | troym@aol.com;adriam@aol.com | adriam@aol.com |

Figure 10: Excel file

Household Mode Exports

As you would expect, the field names have also been changed in the Household mode exports. The old E-Mail 1 and E-Mail 2 fields are called Primary Constituent/Work E-Mail 1 and Spouse/Work E-Mail 2. Also, as you can see in Figure 8 and Figure 10, we've added two new export items: E-Mail (Combined) and E-Mail (Household).

In Household mode, only one record will be exported for the entire household. The primary constituent information is exported as the Constituent and the second constituent is exported as the Spouse. Therefore, the E-Mail (Primary Constituent/Work E-Mail 1) field will always use the

e-mail address belonging to the Primary Constituent and the E-Mail (Spouse/Work E-Mail 2) field will be the e-mail address for the Spouse record.

The E-Mail (Combined) field displays both e-mails for the address, separated with a semicolon. The E-Mail (Household) field uses the e-mail addresses that are marked as "Send Household E-Mail" in the address record (Figure 11).

The screenshot shows a dialog box titled "E-Mails" with two entries. The first entry is for "Adria" with the email address "adriam@aol.com". A checkbox labeled "Send Household E-Mails" is checked and highlighted with a blue box. The second entry is for "Troy" with the email address "troym@aol.com", and its "Send Household E-Mails" checkbox is unchecked. A "DNP" checkbox is visible on the right side of the dialog.

Figure 11: Send Household E-Mails checkbox

This feature is useful for households where only one person wants to receive e-mails from your organization. Using the "Send Household E-Mail" checkbox will also allow you to decide which e-mail address to use to correspond with your different households, and using the E-Mail (Household) field will help you create exports that only contain these e-mail addresses. (See page 9 to learn more about this new checkbox.)

Registrar Exports

In 90_2, we introduced exports to Academic Products such as **REGISTRAR**. These products always treat the addressees in Parent 1, Parent 2, and Other address records as one record/household. In the 90_3 release, the fields in the export tree are now called E-Mail (Father/Name 1) and E-Mail (Mother/ Name 2). E-Mail (Combined) and E-Mail (Household) have now been added; see the preceding "Household Mode Exports" section for an explanation of these new fields.

The screenshot shows the "Parameters - Address Cluster" dialog box. The "Cluster Name" is "Address Cluster" and "No. of Items to Export" is "1". The "Query List" section has "Query Conditions" set to "(All)" and "Sort Conditions" set to "(Default Sort)". The "Include Do Not Publish fields" checkbox is unchecked. The "Available Columns" list on the left includes "Do not Publish Other Number 4", "Do not Publish Telephone Number", "E-Mail (Combined)", "E-Mail (Father / Name 1)", "E-Mail (Mother / Name 2)", "E-Mail (Household)", "Name", "Father / Name 1", "Mother / Name 2", "Combined Addressee/Company Name", "Combined Salutation 1", "Combined Salutation 2", "Combined Salutation 3", "Sort Key", "Primary", "Region", and "Reporting City". The "Selected Columns" list on the right contains "E-Mail (Combined)", "E-Mail (Father / Name 1)", "E-Mail (Mother / Name 2)", and "E-Mail (Household)", with the first four items highlighted by a blue box. Navigation buttons (Up, Down, OK, Cancel) are visible at the bottom right.

Figure 12: E-Mail address fields in Registrar Address Cluster

Crystal Reports

To implement the changes to the e-mail address labels, several changes to existing views were necessary. However, these changes only affect the construction of the address views. The column names have remained the same. You will still find E-Mail 1 and E-Mail 2 in the list of columns, but the function of these columns is now different.

Address Views

In all constituent-based address views, including ALR_CONS_ADDRESS and ALR_ADDR_PRIMARY, where EMAIL previously represented E-Mail 1, it now represents the Constituent's e-mail address. These views contain individual records for each constituent, so when used in a Crystal report, they will function as outlined for the Constituent mode exports above (page 5).

Household-based views, including ALR_COMBINED_ADDR, will continue to function as they had prior to 90_3, or as outlined for Household exports above (page 6). (EMAIL still represents the e-mail address of the primary constituent, EMAIL_2 represents the spouse's e-mail address.)

BUSINESS OFFICE- and **ACADEMIC PRODUCT-** based views, such as RG_ADDR and AR_ADDR, will continue to use the data related to the father/name 1 e-mail address as EMAIL and the mother/name 2 e-mail address as EMAIL_2. Additionally, the two new columns EMAIL_COMBINED and EMAIL_HOUSEHOLD have been added to address views. (Refer to the "Household Mode Exports" explanation above (page 6) for an explanation of how these new fields work.)

You may need to replace the existing e-mail fields in your Crystal Reports with one of the new fields, especially if you had been storing single mother e-mail addresses as E-Mail 1 because these e-mail addresses will now be found in the E-Mail 2 column.

All e-mail addresses will be checked as "Send Household E-Mail" by default because this most accurately reflects the way the system worked previously. Therefore, the EMAIL_HOUSEHOLD field will return these e-mail addresses to your report. This will change as you change the Send Household E-Mail flag for addresses—see page 9. (Contact product support if you're not sure whether you need to replace e-mail fields in your Crystal Reports.)

The Address Table

If you use the ADDRESS table in your Crystal Reports, be aware that data may have moved from EMAIL to EMAIL_2 or vice versa. The construction of the ADDRESS table has not changed, so you may need to use a formula to display EMAIL_2 if EMAIL is now null for records where it had previously contained an e-mail address that should be associated with NAME 2.

Alternatively, you can modify your report to use one of the address views listed above in place of the ADDRESS table. (Generally, for **ALUMNI/DEVELOPMENT** reports, it is easier to use a view than the ADDRESS table, since linking the ADDRESS table back to a particular constituent requires a slightly more complex linking path.)

Since the column names have not changed, your reports will still preview their data without returning any kind of error message, so it is important that you analyze your reports to determine whether any changes are needed before publishing them. Review the data change conditions outlined below to get a sense of what to look for when verifying that your reports still operate according to your needs.

Scenarios Which Would Cause Changes

When you run the 90_3 release, the following scenarios determine how the e-mail addresses will be updated.

| Scenario | Change |
|----------------------------------|---|
| Single Mothers | <p>For records where Name 1 (Father) was null but E-Mail 1 was not null, E-Mail 1 was moved to the E-Mail 2 field before being associated with the remaining single mother. (Each e-mail address must be associated with a member of the family; where there is no Name 1, there can be no E-Mail 1.</p> <p>The mother would be the primary constituent in ALUMNI/DEVELOPMENT, so this e-mail address will display in the upper field. In a BUSINESS OFFICE or ACADEMIC PRODUCT application, it will appear in the lower field.</p> <div style="display: flex; justify-content: space-around;"> <div data-bbox="495 625 885 829" style="border: 1px solid gray; padding: 5px;"> <p>E-Mails</p> <p>Father / Name 1 E-Mail DNP</p> <input type="checkbox"/> <p><input checked="" type="checkbox"/> Send Household E-Mails</p> <hr/> <p>Mother / Name 2 E-Mail</p> <p>alejandra.seabaugh@yourschool.edu DNP</p> <input type="checkbox"/> <p><input checked="" type="checkbox"/> Send Household E-Mails</p> </div> <div data-bbox="922 625 1312 829" style="border: 1px solid gray; padding: 5px;"> <p>E-Mails</p> <p>Alejandra</p> <p>alejandra.seabaugh@yourschool.edu DNP</p> <input type="checkbox"/> <p><input checked="" type="checkbox"/> Send Household E-Mails</p> <hr/> <p>Spouse</p> <p><input type="checkbox"/> Send Household E-Mails</p> </div> </div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <i>Academic/Business Office</i> <i>Alumni/Development</i> </div> |
| Single Fathers | <p>For records where Name 1 (Father) exists but the only available e-mail address is in the E-Mail 2 slot, the E-Mail 2 value has been moved to the E-Mail 1 slot before associating with the existing father. Obviously, the father would be the primary constituent in ALUMNI/DEVELOPMENT, so in both applications the e-mail would appear in the top slot.</p> |
| Constituent-only address records | <p>If a record exists only in ALUMNI/DEVELOPMENT and a household contained only a primary constituent, but the e-mail address had been stored as E-Mail 2, it has been moved to E-Mail 1 before associating it with the Primary constituent.</p> |

New Send Household E-Mail Checkbox

As we said before, the new Send Household E-Mail checkboxes will be set to "Yes" (checked) for all e-mail addresses. If you were using E-Mail 1 for a household e-mail address and storing E-Mail 2 data but don't intend on sending e-mails to these addresses, please contact product support for assistance.

In households where two e-mail addresses were found, the update will not move the addresses. Therefore, we are still able to identify which e-mail address was previously stored as E-Mail 1 and can set E-Mail 2's "Send Household E-Mail" checkbox to "No" (unchecked). You must contact support before manually changing these e-mail addresses into their proper locations or the results of globally setting the "Send Household E-Mail" checkbox will be inaccurate.

If you kept two e-mail addresses but intentionally used E-Mail 1 as your default e-mail address, regardless of its owner, you will see that the name associations to these e-mail addresses are now incorrect. These can be corrected manually if you feel it is appropriate, but can be left as-is and should continue to display on reports, in mailings, and on Crystal reports as they did before the update.

Similarly, for records that exist only in **ALUMNI/DEVELOPMENT**, if a household had both a "P" and an "S" record and two e-mail addresses within the "CM" address, the addresses are left as-is. If the initial state of the e-mail addresses was reversed in respect to the position of the

constituents then the associations will now be incorrect, but **ALUMNI/DEVELOPMENT** household mode and **BUSINESS OFFICE** or **ACADEMIC PRODUCT** output should appear the same as before the update.

Constituent mode output should now appear as outlined in the Constituent Export explanation above (page 5). This is meant to allow you to associate the e-mail addresses to the proper person as time allows. We are also currently developing an interface that will help you handle large amounts of e-mail address association changes more easily.

To Summarize...

Altering the data as outlined in this release bulletin is meant to maintain your existing view of the data while making it consistent with the new rules for storing e-mail addresses accurately. Your parents and/or constituents may not have e-mail addresses that in any way reflect their real names and, until now, there was no way to identify the owner of an e-mail address other than your particular data entry convention. Now, you will be able to link e-mail addresses directly to a specific person and maintain the integrity of each e-mail address, regardless of a person's positions in all modules.

If you experience problems with this update or have concerns about your data that might be a result of the update, please contact Product Support for assistance before attempting to alter any of your records.

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