

TheRaiser'sEdge[®] Enterprise[™]

Alumni Data Entry Guide

031208

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Alumni Data Entry Guide

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What Is In This Guide?

In the *Alumni Data Entry Guide*, you learn to contact, solicit, and better manage alumni. You can also learn about the following:

- “Basic Information on the School Tab” on page 12
- “Defining Education Attributes for Alumni” on page 14
- “Primary Alumni Information” on page 16
- “Additional Alumni Information” on page 24
- “Education/School Records for Individual Alumni Relationships” on page 29



How Do I Use These Guides?

The Raiser’s Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the *Raiser’s Edge* documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser’s Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.co.uk. From the menu bar, select **Support, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about *The Raiser’s Edge* by accessing the help file in the program. Select **Help, The Raiser’s Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter “Load Defaults”. The help file searches for the complete phrase in quotes instead of individual words.

W e l c o m e

Icons

The following icons are used in the side margins to denote additional information such as notes, warnings, time-savers, or definitions. You can also use these margins to write your own notes.



The notepad symbol designates a note or tip related to the information in the main text column.



The traffic light indicates a cautionary note. Generally, we use this icon to point out a step that may have unwanted results.



The clock symbol designates a shortcut or timesaving action.



The dictionary symbol designates the definition of a frequently used term.

Alumni Tracking


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Chapter 1

 **Alumni Tracking** provides prepared reports to analyse and track your former students. For more information about these reports, see the *Reports Guide*.

Alumni Tracking is designed specifically for educational organisations to help contact, solicit, and better manage alumni. Through this module, you can track your alumni and their educational status.

If you use *Alumni Tracking*, you can check a constituent education record as primary. When you check an education record as primary, you are designating the record as the main or most recent education record for the constituent. This is a valuable tool when working with constituents or their friends and relatives who have numerous education records. The record checked as primary also appears when you run queries and reports. A variety of education/alumni reports are available through this module to help you view and evaluate the educational status of your alumni.

In this chapter, you will learn how to access, add, and work with alumni and their relationships. You can access alumni information in two ways. The first is through the **Education** button of a constituent record Bio 1 tab. Here, you can add and work with a constituent's primary alumni information. Through the Bio 1 tab, you can add other education/school relationships and alumni information for your constituent individual relationships. You can also choose to enter the relationship as a constituent in your database.

Frequently Used Terms

This section defines words and phrases you need to know as you work with alumni information. If you come across an unfamiliar term when reading this or any chapter in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file.

Alumni. Alumni are people who attended or graduated from a particular establishment, college, university, or organisation. Alumni can also be people who contribute or are members of an establishment, college, university, or organisation.

Attribute. An attribute is a useful bit of information you attach to an education/school record to track additional details about an alumnus. Because you create attributes, you can use them to customise *The Raiser's Edge* to suit your organisation's specific needs. You can define categories of useful information and create entries within these categories to include with your education/school records.

For example, you can create a category called Sports with entries for Golf, Tennis, and Gymnastics. You can then query the database for this information to target your appeals or to create an invitation list for certain fundraisers your organisation holds. For example, you are having your annual tennis tournament and you want to invite all constituents with an interest in tennis to play in your tournament. You can query the database to find all constituents with an interest in tennis and compile an invitation list from the information in your database.

Constituent Code. A constituent code is a category you assign to a constituent in your database. This code helps you identify the relationship a constituent has to your organisation. In other words, it defines why a constituent is in your database. You should assign at least one constituent code to each of your constituent records. For example, on the Bio 2 tab, you can assign the constituent code Alumnus to each constituent in your database who graduated or attended your establishment. This not only helps you identify a constituent

as an alumnus, but later you can use these codes when querying your database for reports and mailings. You can set your user options so that the constituent code abbreviation appears on the record when opened. For example, the constituent code abbreviation AL (for Alumnus) will appear on the constituent record when opened.

Constituent Record. A constituent record stores information about the people and companies who support your organisation by contributing time, funds, and resources. Each person or company has its own constituent record.

Primary Alumni Information checkbox. The **Primary alumni information** checkbox is located on the school tab of the education/school record. You can check the checkbox to designate the education record as the primary, or main, education information for a constituent. The primary education/school record may be the most recent establishment a constituent attended, your establishment, or the establishment that is most associated with your organisation. If a constituent has multiple education/school records, this checkbox helps you keep track of the one that is most relevant to your cause. In addition, when your constituents or their friends and family have multiple education records, checking the **Primary alumni information** checkbox helps you keep track of the education/school record that is relative to your establishment.

For example, your establishment is hosting an Alumni Ball fundraiser for alumni who attended your establishment within the last twenty years. You know that many of these alumni continued their education at other institutions or transferred, to continue their education elsewhere. Because of this, you need to track several education records for each alumnus. When the time comes to send invitations for the Ball, because you checked your establishment as the primary education information for each alumnus in your database, you can quickly query the database for a guest list.

Navigating in Alumni Tracking

Before you begin tracking information about your alumni in *The Raiser's Edge*, you must first access the constituent record. You can add or open the constituent record from the Constituents page of *Records*. The following procedures show you how to quickly open a constituent record to access alumni information. For more information about adding a constituent record, see the *Constituent Data Entry Guide*.

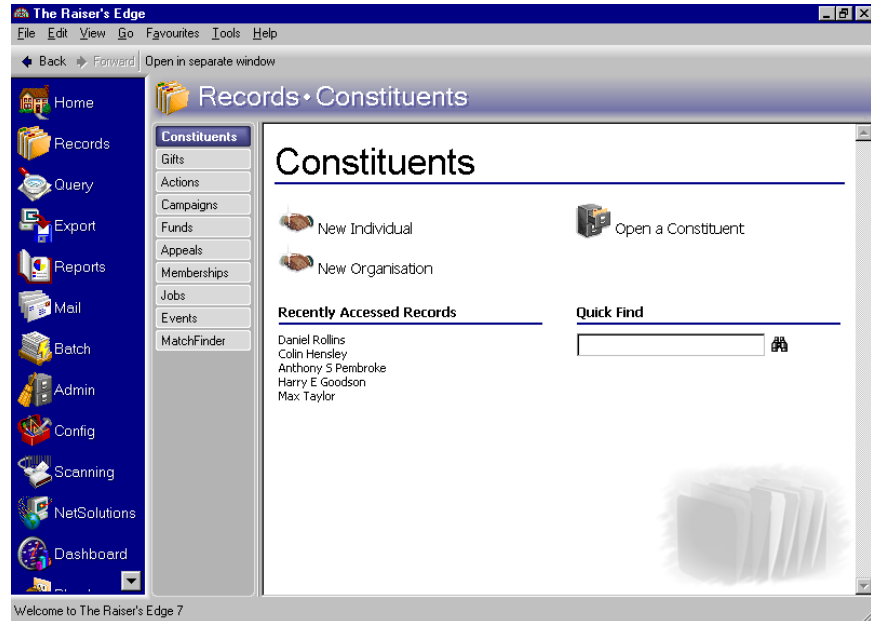
Accessing Alumni Information from the Constituent Bio 1 Tab

When you access alumni information from the Bio 1 tab, the Education/School screen appears with the primary education record (if one exists). Only one education record can be checked primary for each constituent. This helps you recognise the main or most recent education information for your constituent.

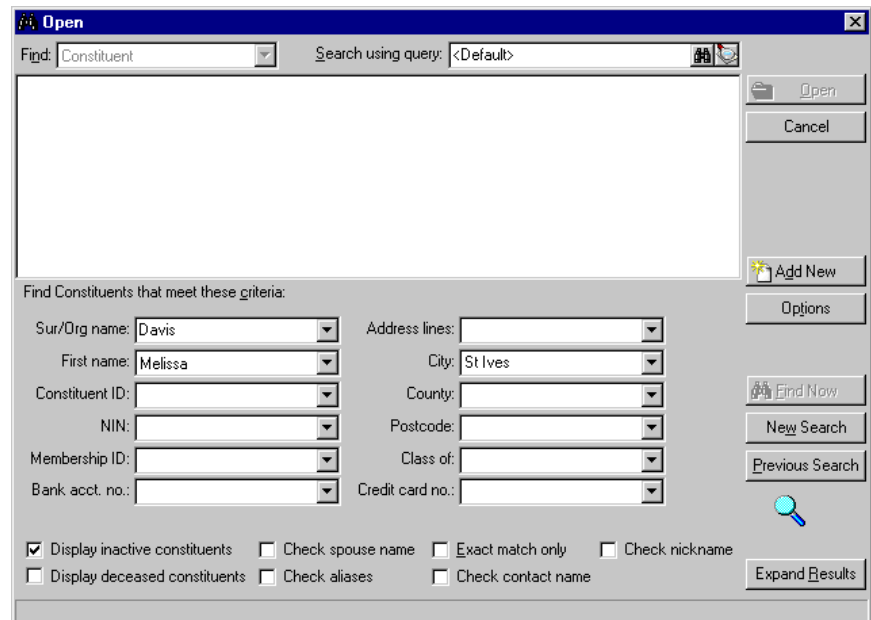
If no primary education record exists, a blank education screen appears so you can add new constituent education information. When the blank screen appears, the **Primary alumni information** checkbox always defaults to checked.

➤ **Accessing Education from the Bio 1 tab**

1. On the Raiser's Edge bar, click **Records**.
2. Click **Constituents**. The Constituents page appears.





3. Click **Open a Constituent**. The Open screen for constituents appears.



4. In the **Find Constituents that meet these criteria** frame, decide what criteria you want to use when searching for your constituent and enter the information in the appropriate criteria fields. The criteria you can use include the constituent's surname or first name, ID, National Insurance Number, membership identification number, bank account number, address lines, city, county, postcode, class of format, and credit card number.
5. Click **Find Now**. If the search criteria you entered matches a constituent in the database, it lists in the grid on the Open screen. Depending on how limited or detailed your criteria are, the program may find one or many records.

6. In the grid, select the constituent whose record you want to open.

 You can enter the first few letters or characters in the **Find Constituents that meet these criteria** fields if you do not know the correct spelling or number. For more information about how to use these fields, see the *Program Basics Guide*.

 We recommend you search by one or two of the most helpful criteria types because the results that appear in the grid must match all criteria you enter. Adding too much criteria information in the **Find Constituents that meet these criteria** fields can actually prevent you from finding a constituent.

7. Click **Open**. The constituent record appears.

Melissa C Davis

File Edit View Constituent Letter Favourites Tools Help

Save and Close

Attributes Bio 1 Bio 2 Actions Addresses Addressees/Salutations Relationships Appeals Notes Gifts

Volunteer Prospect Membership Events

Honour/Memorial

Biographical

Surname: Davis Aliases

First name: Melissa

Middle name: Christina

Titles: Mrs

Suffixes:

Nickname:

Maiden name:

ID: 18

Gender: Female NIN:

Birth date: 27/02/1971 Age: 35

Deceased? Date:

Marital status:

Spouse

Solicit code:

Preferred Address: Home

Country: United Kingdom More...

Address lines: 88 Smithfield Way

City: St Ives

County:

Postcode: TR16 1JA DPS:

DNC	Type	Number/Email Address	Shared?
	Home	01480 462 322	Not Shared
	Business	01480 462 3227	Not Shared

This constituent

Is inactive Is a canvasser Details

Gives anonymously Has no valid addresses

Requests no email Declaration Information

Major Donor Prospect

Education Business Bank

8. Select the Bio 1 tab.
9. Click the **Education** button. The Education/School screen appears.

Education/School for Melissa C Davis

File Edit View Education Help

Save and Close

School Attributes/Notes

Establishment: University of Nottingham Primary alumni information

Type: University

Campus: Oswald Campus

Known name: Mel Frat/Sorority:

Registration no.: 12552

Course Information

Subject of study: English Class of: 1993

Department: Department of English Date entered: 17/08/89

Faculty: Faculty of English Date graduated: 15/05/93

Class of degree: First Class Date left:

Status: Graduated

Degree: BA

10. After you enter or edit the appropriate alumni information, click **Save and Close** on the toolbar. You return to the Bio 1 tab of the constituent record.


Accessing Alumni Information from the Constituent Relationships Tab

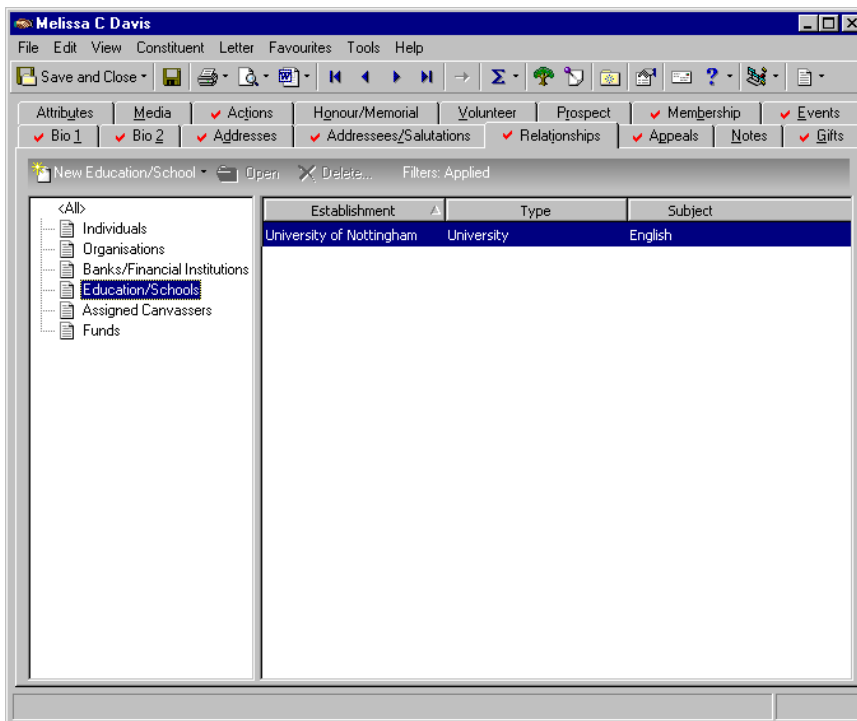
From the Relationships tab, you can add or change education information for your constituent relationships. If no other education record is checked as primary, you can check the **Primary alumni information** checkbox as primary from the Relationships tab.

Checking an education record as primary helps you keep track of the “primary” education information for your constituent. When you check an education record as primary, you are designating the record as the main or most recent education record for the constituent. The primary record checked appears when you run queries and reports.

➤ Accessing alumni information from the Relationships tab

1. From Melissa Davis’s constituent record, select the Relationships tab. For more information about accessing a constituent record, see “Navigating in Alumni Tracking” on page 3.

 You can maximise and resize your constituent records.




2. From the tree view on the left, select **Education/Schools**.

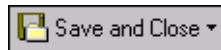
3. In the **action bar**, click **New Education/School**. The New/Education School screen appears.

4. After you enter the appropriate alumna information, click **Save and Close** on the toolbar. You return to the Relationships tab of Melissa Davis's record.

Education/School Screen Toolbar

 You can set up a user option that enables you to view tooltips that explain the function of each toolbar command. Tooltips appear when you move your cursor across each item on the toolbar. For more information about setting up this user option, see the *Program Basics Guide*.

When you click the **Education** button on the Bio 1 tab, you have access to the toolbar on the Education/School screen. The toolbar is located between the education/school record's menu bar and the tabs. It is designed to give you quick access to commands and functions you use most often. Menu bars are discussed in detail in the *Program Basics Guide*.



Save and close the record (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the record, close the saved record, and open a new record.)



Save the record



Delete the record



Go to the previous education record of the current constituent



Go to the next education record of the current constituent



View education record properties



Access help from online help files, user guides, online support, or the Blackbaud Web site



Create and edit macros to create shortcuts for functions you perform repeatedly in *The Raiser's Edge*. This toolbar button is available only if you use *VBA for Advanced Customisation*.

User Options for Alumni

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you are using. User options are login-specific, which means that if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. Setting user options in constituent records affects the way the Education/School screen appears when you are working with constituent alumni information.

Configuring *The Raiser's Edge* properly is important. You have your own tastes and preferences, but many of the configuration options can dramatically change the “look and feel” of the program. For example, you can define how constituent names appear in the Education/School title bar. For more information about setting User Options for constituent records, see the User Options chapter of the *Program Basics Guide*.

Business Rules for Alumni

Unlike user options, business rules affect all workstations using *The Raiser's Edge*. When you work with alumni information on a constituent record, you can use business rules to set defaults. Defaults are predefined bits of information that automatically appear in specific fields you set. This becomes helpful when you enter the same information frequently.

You access business rules for the alumni section of a constituent record through *Configuration*. Here, you can enter a default establishment name and date to appear on every education/school record you add for your organisation. If needed, you can easily change establishment names and dates on any constituent record. Defaults make data entry easier and allow you to more effectively track your alumni.

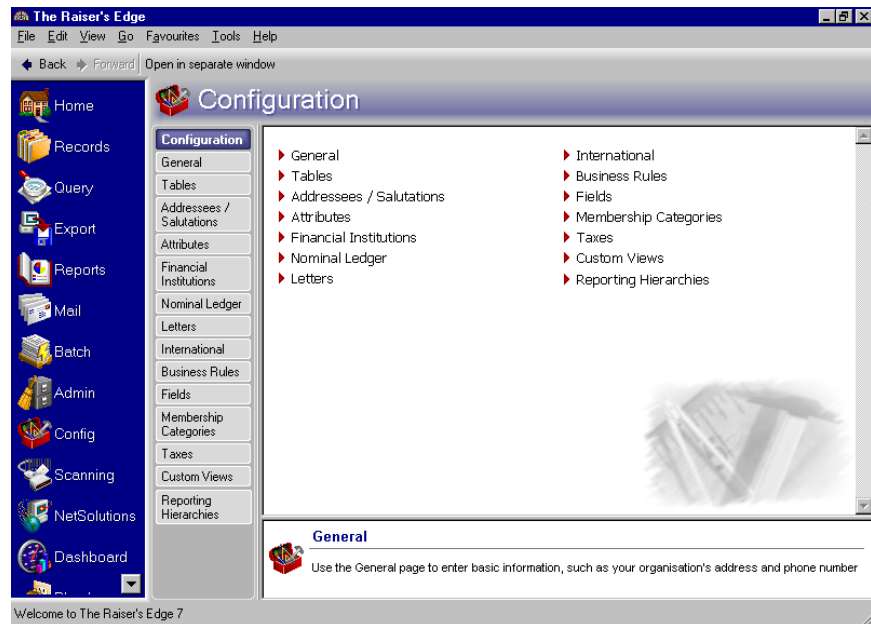
You can set business rules only if you have appropriate security rights established from the **Security** link of *Administration*. For more information about setting business rules, see the *Configuration & Security Guide*.



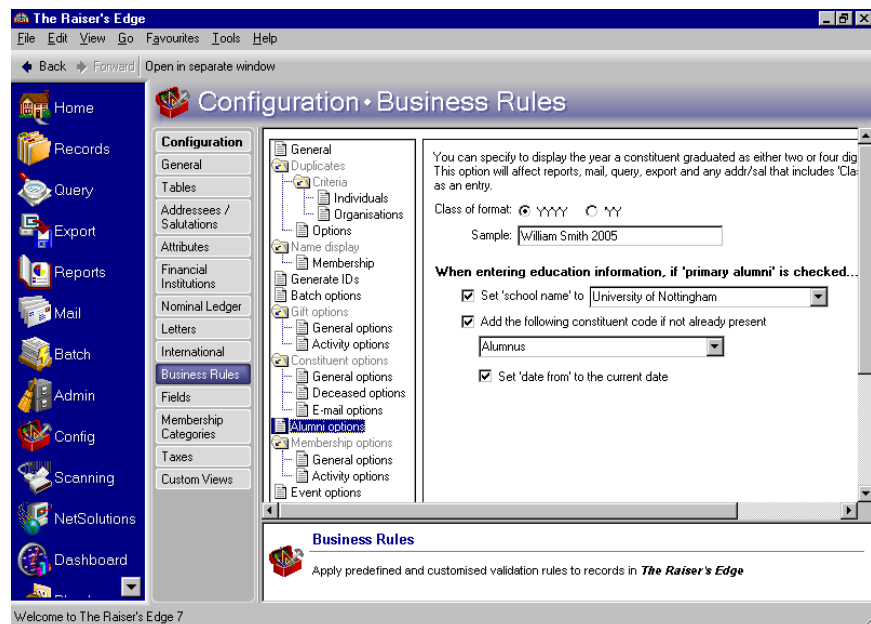
Defaults are guidelines you set up to simplify data entry. When a program defaults information in a field, you can change the information by selecting the text and typing over it with the correct entry.

➤ Defining the Class of business rule

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.



2. Click **Business Rules**. The Business Rules page appears.



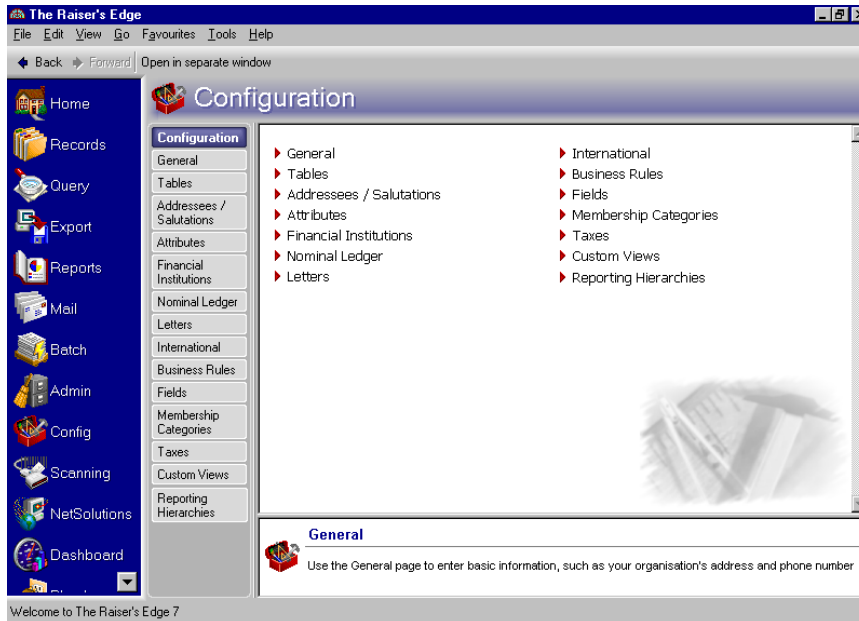
3. From the tree view on the left, select **Alumni options**. The alumni options appear on the right.
4. You can select how you want the Class of date to appear on records, mail, and reports. You can select the options **YYYY** or **YY** for **Class of format**.

For example, if you select the option **YYYY** for the year 2005, the year format appears as 2005. If you select the option **YY**, the year format appears as '05.

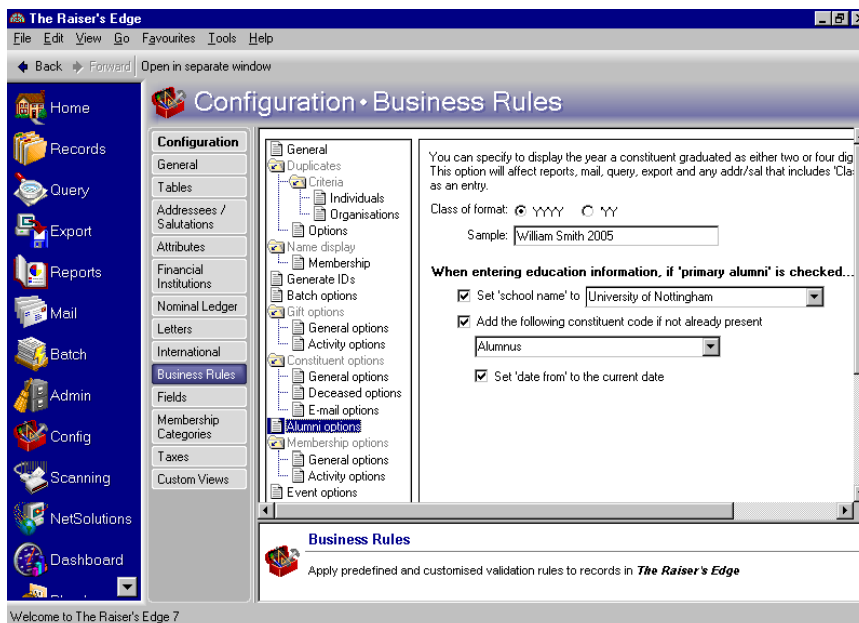
The default you set appears in any record containing the **Class of** field.

➤ Defining alumni school/college business rules


1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.



2. Click **Business Rules**. The page appears.



3. From the tree view on the left, select **Alumni options**. The alumni options appear on the right.
4. Check the **Set 'school name'** checkbox and select your establishment name in the adjacent field.

 You can add additional establishment names by clicking in the **Set 'school name' to** field and pressing **F7**.

5. If you want to add a constituent code defining why the constituent is in your database, check the **Add the following constituent code if not already present** checkbox.

Adding constituent codes to your constituent alumni records helps you understand the relationship that constituent has to your organisation. For example, you can select “Alumnus” as your default constituent code to appear on all new constituent records. This code designates that these new constituents are alumni of your organisation.

6. When you check **Add the following constituent code if not already present checkbox**, the **Set 'date from' to the current date** checkbox is enabled. Check this checkbox if you want the date you add the constituent to your database to appear in the **Date From** column in the **Constituent Codes** grid on the constituent record's Bio 2 tab.

Defaults you set appear on the education/school screen when the **Primary alumni information** checkbox is checked.

Overview of Alumni Information

In *The Raiser's Edge*, you can access the Education/School screen from the Bio 1 tab or the Relationships tab of a constituent record. The Education/School screen is divided into two tabs: the School tab and the Attributes/Notes tab. These tabs help you organise and store alumni information for your constituents and their relationships (friends or relatives). The more alumni information you add about each constituent, the more detailed you can make your queries and reports.

Basic Information on the School Tab

The School tab stores basic alumni details for your constituents. If you use *Alumni Tracking*, you have the option to check a constituent education record as primary. This option helps you organise which establishment you want to be the “primary”, or main establishment, for the constituent. You can check only one education record as primary for each constituent.

On the School tab, you enter the name and type of establishment your constituent attended. You can even specify the campus if there is more than one for that particular establishment. You can use the **Known name** field to track a name the constituent was known by while attending your establishment. Known names can be nicknames, abbreviated names, or full names.

Education/School for Melissa C Davis

File Edit View Education Help

Save and Close - [Icons]

School Attributes/Notes

Establishment: University of Nottingham Primary alumni information

Type: University

Campus: Oswald Campus

Known name: Mel Frat/Sorority: [Empty]

Registration no.: 12552

Course Information

Subject of study: English Class of: 1993

Department: Department of English Date entered: 17/08/89


Faculty: Faculty of English Date graduated: 15/05/93

Class of degree: First Class Date left: [Empty]

Status: Graduated

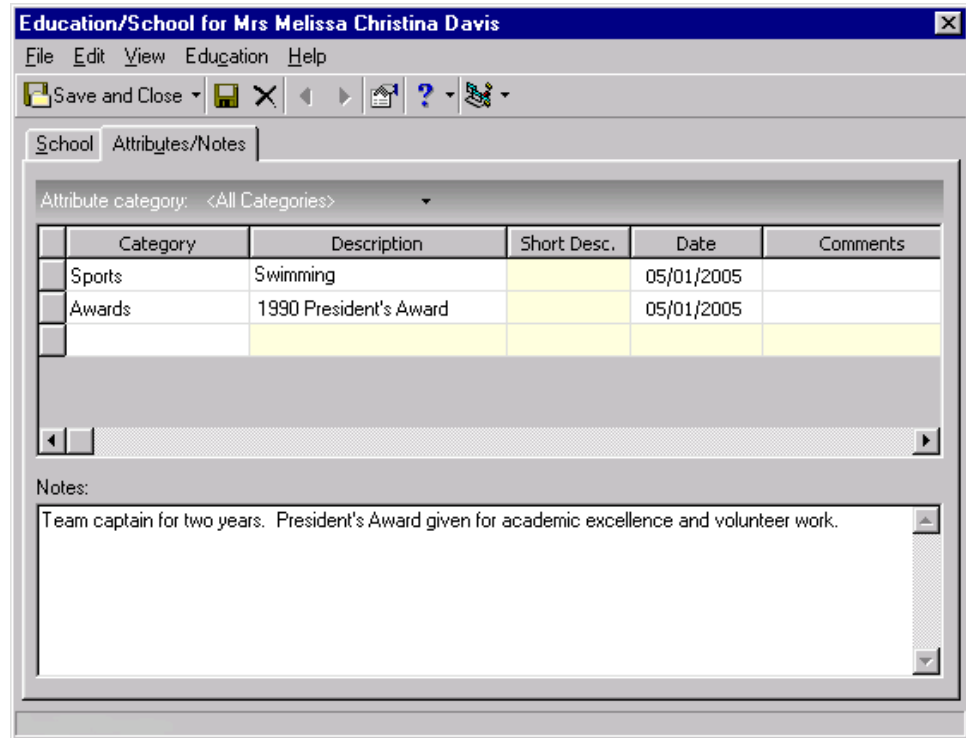
Degree: BA

You can specify the registration number, degree, and class of your constituent. The **Date entered**, **Date graduated**, **Date left**, and **Status** fields help you track when a constituent enrolled and if they graduated or left before graduating. Tracking a constituent's subject of study, department, and faculty is useful when you are ready to solicit them for specific campaigns or funds.

 Remember to use either the **Date graduated** field or the **Date left** field, but not both.

Additional Alumni Information

The Attributes/Notes tab stores additional information for constituent alumni. This tab is especially helpful in tracking sports, honours, or awards the constituent received while attending the establishment.



Category	Description	Short Desc.	Date	Comments
Sports	Swimming		05/01/2005	
Awards	1990 President's Award		05/01/2005	

Notes:
Team captain for two years. President's Award given for academic excellence and volunteer work.

The **Category** and **Description** fields help you track the organisation, club, or sport the constituent participated in, while the **Date** and **Comments** fields help you track when you entered the information and why. In the **Notes** grid, you can enter any additional information to help you better track that constituent. For more information about adding attributes, see the *Configuration & Security Guide*.

Defining Education Attributes for Alumni

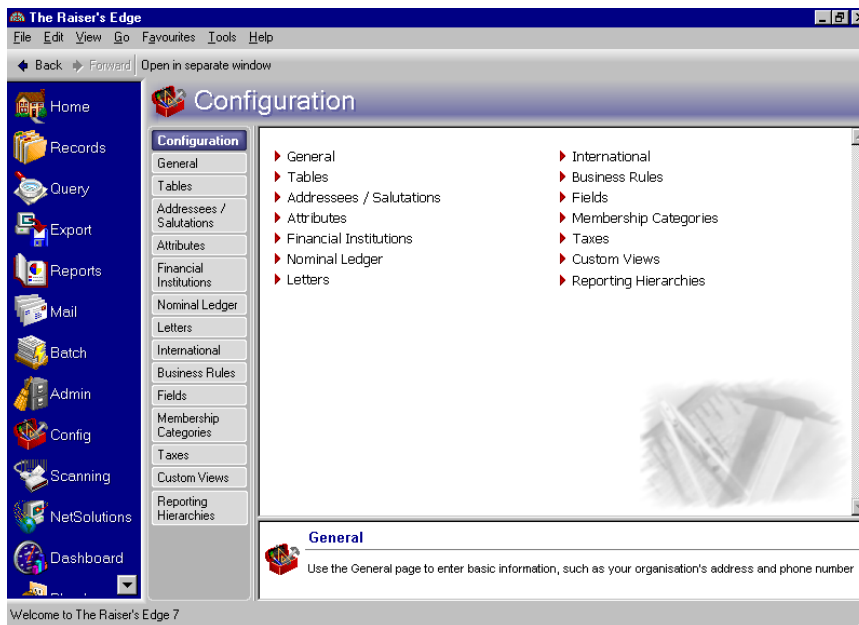
Before you begin adding constituent alumni information, you need to understand how attributes work. Attributes are useful bits of information you can attach to a record. Because you create attributes, you can use them to customise *The Raiser's Edge* to suit your establishment's specific needs. Attributes can be anything from sports to clubs and are used to better solicit your constituents. For example, if you want to hold an athletic banquet to raise money for the athletic program at your establishment, you will want to invite all alumni who played sports while attending your establishment.

Defining education attributes can save time when selecting education information for your constituent. By defining specific attributes to be listed in the attribute tables, you can easily select the categories or characteristics that best describe your constituent.

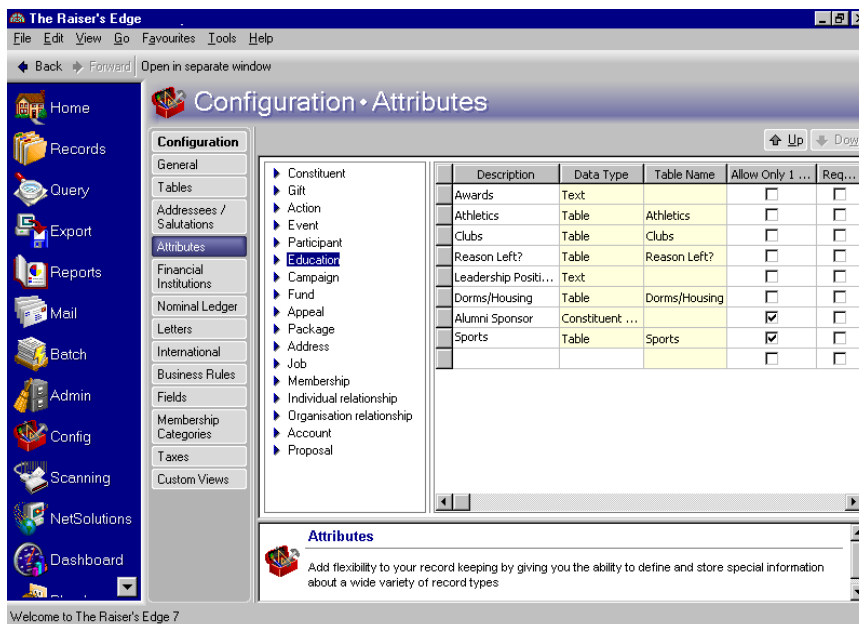
➤ Defining education attributes

You can add flexibility to *The Raiser's Edge* by storing special constituent information as education attributes. For example, you can enter a constituent's university honours, awards, and participation in sports or other extracurricular activities.


1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.





2. Click **Attributes**. The Attributes page appears.



3. From the tree view on the left, select **Education**. The Education Attributes grid appears on the right.

 Some examples of attribute descriptions include Honours, Awards, Clubs, Athletics, and Activities.

 If you select “Table” in the **Data Type** column, you can select from a list of existing tables or create a new one by selecting “Add a New Table” in the **Table Name** column. You can set up entries for your tables using the **Tables** link of *Configuration*. For more information, see the *Configuration & Security Guide*.

 To delete an attribute, select the row, right click, and select **Delete Row**.

4. In the **Description** column, enter a description for the attribute category. The description for the attribute appears in the Education/School screen on the Attributes/Notes tab under **Category**.
5. In the **Data Type** column, select the format in which you want the data stored. You can set your attributes to appear in the form that best suits the needs of your organisation. Your choices are Text, Number, Date, Currency, Yes/No, Table, Constituent Name, and Fuzzy Date. For more information about these formats, see the *Configuration and Security Guide*.
6. In the **Table Name** column, you can specify the table name that holds your data if you select Table in the **Data Type** column.
7. If you want to allow only one attribute of this type to be added per record, check the checkbox in the **Allow Only 1 per Record** column of that attribute row.

For example, if you have an attribute **Description** of “Career Advisor” that tracks the faculty member who advises a student during the year, you would check the checkbox in the **Allow Only 1 per Record** column of that attribute row to indicate each student is assigned only one career advisor.

8. If you want to require that the attribute be entered on all alumni records, check the checkbox in the **Required** column of that attribute row.

For example, if you have an attribute **Description** of “Career Advisor” that tracks the faculty member who advises a student during the year, you need to check the checkbox in the **Required** column of that attribute row to indicate that each student must have a career advisor.

9. Use the **Up** and **Down** buttons in the upper right corner to arrange the attributes in the order you want them to appear on the education record. Do this by selecting the row you want to move and clicking the **Up** or **Down** button.

Managing Alumni Information

You can add alumni information from the **Education** button of the Bio 1 tab of the constituent record. You can also add alumni and relationship information from the Relationships tab of a constituent record.

Primary Alumni Information

You can add alumni information from the Bio 1 tab of a constituent record. When the New Education/School screen appears, the **Primary alumni information** checkbox defaults to checked. You can check only one education/school record as primary. This helps you keep track of the main or most recent education information for your constituent.

If no primary education record exists, a blank education screen appears so you can add new constituent education information.

➤ Adding primary alumni information from the constituent Bio 1 tab



Your organisation received Melissa Davis's alumna information from a questionnaire sent out earlier this month. In the questionnaire, Melissa included information about her extracurricular and sports activities that she participated in while at your establishment. Add Melissa's alumna information to her constituent record.

1. From Melissa Davis's constituent record, select the Bio 1 tab. For more information about opening a constituent record, see "Navigating in Alumni Tracking" on page 3.
2. Click **Education**. The Education/School screen appears.


3. Select the School tab.
4. In the **Establishment** field, select "University of Nottingham".
5. In the **Type** field, select "University".
6. In the **Campus** field, enter "Oswald Campus".
7. In the **Known name** field, enter the name by which Melissa is typically known.
8. In the **Frat/Sorority** field, enter the name of the sorority to which Melissa belonged, if any.
9. In the **Registration no.** field, enter the registration number for Melissa.
10. Check the **Primary alumni information** checkbox because the University of Nottingham is the primary establishment Melissa Davis attended. This is her main, or primary, education information.




We recommend checking the **Primary alumni information** checkbox on the education record relating to your organisation. This way, the constituent appears in your alumni reports.

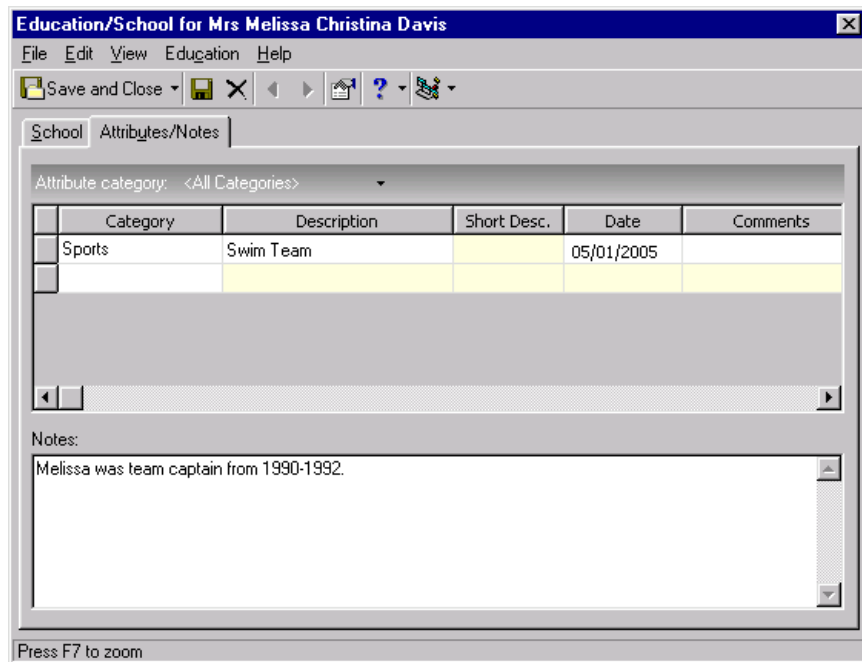


You can add additional establishment names by clicking in the **Establishment** field and pressing **F7**.

 Auto Complete occurs when you type the first few letters of information in a field, and the rest of the information automatically defaults in. For example, if you type “G” in the **Status** field, then “Graduated” automatically defaults.


 The **Class of** format is established in the Business Rules section for Alumni in *Configuration*. For detailed information, see the *Configuration & Security Guide*.

11. In the **Subject of Study** field, select “English”.
12. In the **Department**, select “Department of English”.
13. In the **Faculty** field, select “Faculty of English”.
14. In the **Class of degree** field, select “First Class”.
15. In the **Status** field, select “Graduated”.
16. In the **Degree** field, select “BA”.
17. In the **Class of** field, enter “1993”.
18. In the **Date entered** field, enter the date 17/08/89.
19. In the **Date graduated** field, enter the date 15/05/93.
20. Select the Attributes/Notes tab.



Category	Description	Short Desc.	Date	Comments
Sports	Swim Team		05/01/2005	

Notes:
Melissa was team captain from 1990-1992.

 When you set up your attributes in *Configuration*, and you select an attribute that contains a short description, the **Short Desc.** column on the Attributes/Notes tab is then enabled.

21. In the first row of the **Category** column, select “Sports”.
22. In the first row of the **Description** column, select “Swim Team”.
23. In the first row of the **Date** column, enter today’s date because you are entering Melissa’s attribute information today.
24. In the **Notes** box, enter any additional notes.
25. Click **Save and Close** on the toolbar. You return to the Bio 1 tab of Melissa Davis’s record.

➤ Editing primary alumni information from the constituent Bio 1 tab



You are updating your alumni information and realise that Melissa Davis's graduation date was 1994 instead of 1993. You also find out that Melissa was awarded University of Nottingham's 1990 President's Award. This award is given to an enrolled second year who has contributed time and effort to the university and surrounding community through volunteering, while maintaining high academic excellence. Add these changes to Melissa's record.

1. From Melissa Davis's constituent record, select the Bio 1 tab. For more information about opening a constituent record, see "Navigating in Alumni Tracking" on page 3.
2. Click the **Education** button. The Education/School screen appears.

3. In the **Class of** field, change Melissa's class of date from 1993 to 1994.

4. In the **Date graduated** field, change Melissa's graduation date from 15/05/93 to 15/05/94.

The screenshot shows a software window titled "Education/School for Melissa C Davis". The "Attributes/Notes" tab is active. The form contains the following fields:

- Establishment: University of Nottingham
- Type: University
- Campus: Oswald Campus
- Known name: Mel
- Registration no.: 12552
- Course Information:
 - Subject of study: English
 - Department: Department of English
 - Faculty: Faculty of English
 - Class of degree: First Class
 - Status: Graduated
 - Degree: BA
 - Class of: 1994
 - Date entered: 17/08/89
 - Date graduated: 15/05/94
 - Date left: (empty)

5. Select the Attributes/Notes tab.

The screenshot shows a software window titled "Education/School for Mrs Melissa Christina Davis". The "Attributes/Notes" tab is active. The form contains the following elements:

- Attribute category: <All Categories>
- Table with columns: Category, Description, Short Desc., Date, Comments.

Category	Description	Short Desc.	Date	Comments
Sports	Swim Team		05/01/2005	
- Notes:
 - Melissa was team captain from 1990-1992.

6. In the second row of the **Category** column, enter "Awards".
7. In the second row of the **Description** column, enter "1990 President's Award".

- In the second row of the **Date** column, enter today's date because you are entering Melissa's attribute information today.

Category	Description	Short Desc.	Date	Comments
Sports	Swim Team		05/01/2005	
Awards	1990 President's Award		05/01/2005	

Notes:
Melissa was team captain from 1990-1992. President's Award given for academic excellence and volunteer work.

- In the **Notes** grid, enter "President's Award given for academic excellence and volunteer work."
- Click **Save and Close** on the toolbar. You return to the Bio 1 tab of Melissa Davis's record.

➤ Deleting primary alumni information from the constituent Bio 1 tab

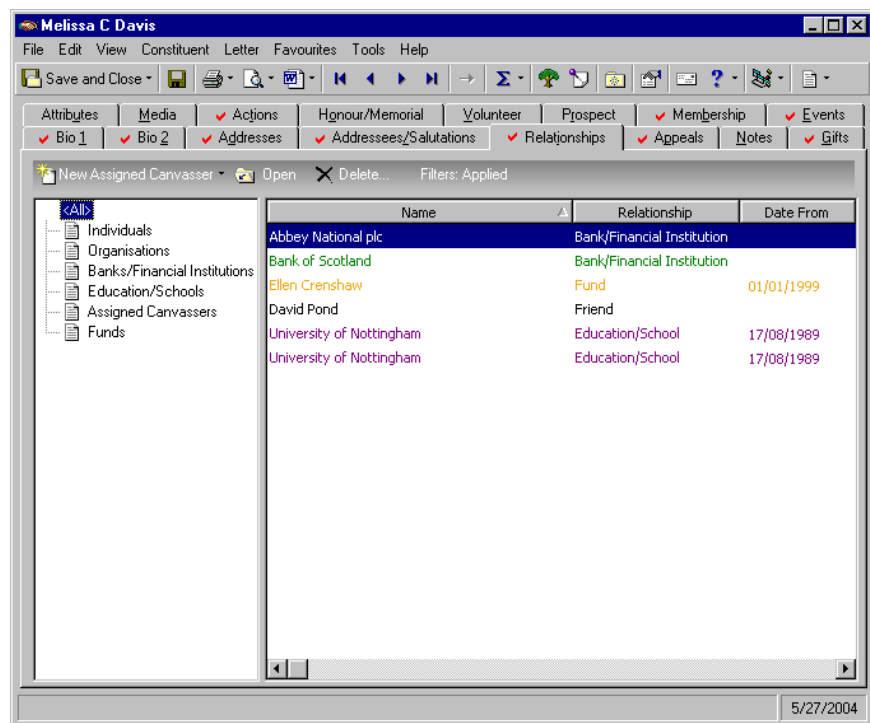
You can delete primary alumni information from the Bio 1 tab by opening the education record from the Bio 1 tab and clicking the **Delete** button on the taskbar. For more information about opening an education record from the Bio 1 tab, see “Accessing Education from the Bio 1 tab” on page 4. However, we suggest deleting education records from the Relationships tab of a constituent record. This way, you can view all education information for a constituent to ensure that you are deleting the correct record.

Deleting a constituent education/school record is permanent. We suggest you print the information first to keep as a record.



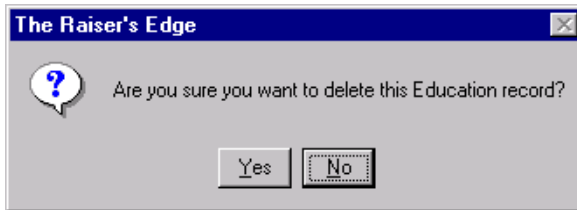
You are editing a date on Melissa Davis’s education record. You notice that her primary education record, the University of Nottingham, has been mistakenly entered twice: once as a primary education record and once as an additional education record. You know that the University of Nottingham is Melissa’s primary education record, so you need to delete the additional education record.

1. From Melissa Davis’s constituent record, select the Relationships tab. For more information about opening a constituent record, see “Navigating in Alumni Tracking” on page 3.



2. From the tree view on the left, select **All**. You can now view all relationship information for Melissa.
3. Select the additional education record for the University of Nottingham and click **Delete**.

4. A message appears confirming your wish to delete the education/school record from your database.



5. Click **Yes**. The record permanently disappears from the grid.
6. Click **Save and Close** on the toolbar. The record disappears from the grid and is permanently removed from your database.

Additional Alumni Information

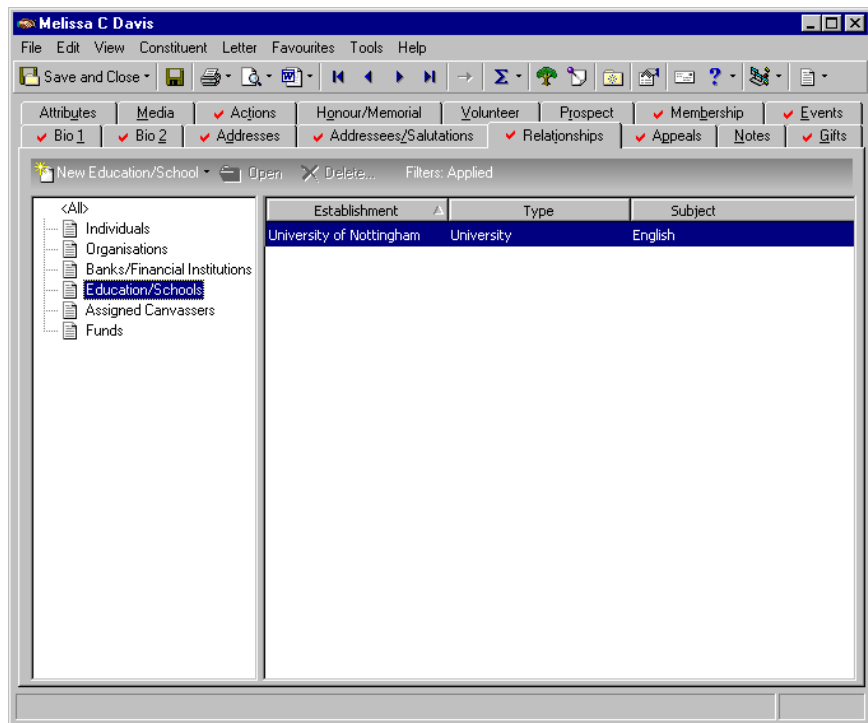
➤ Adding additional alumni information through the Relationships tab

You can add additional alumni information that is not the primary education record for a constituent through the Relationships tab.



Melissa Davis attended postgraduate school at the University of Wales. Your establishment has an Education Fund that helps support area businesses in teaching literature seminars to local secondary schools. Melissa is a prospect for donating to this fund. Add Melissa's additional alumni information.

1. From Melissa Davis's constituent record, select the Relationships tab. For more information about opening a constituent record, see "Navigating in Alumni Tracking" on page 3.



2. From the tree view on the left, select **Education/Schools**.

- From the action bar above the tree view, click **New Education/School**. The New Education/School screen appears.

New Education/School for Melissa C Davis

File Edit View Education Help

Save and Close Print Back Forward Home Help Refresh

✓ School Attributes/Notes

Establishment: University of Wales Primary alumni information

Type: University

Campus: Aberystwyth

Known name: Mel Frat/Sorority:

Registration no.: 005265

Course Information

Subject of study: English Class of: 1999

Department: Department of English Date entered: 15/08/95

Faculty: Faculty of English Date graduated: 15/05/99

Class of degree: First Class Date left:

Status: Graduated

Degree: MA

Press F7 for table lookup

- From the Education/School screen, select the School tab.
- In the **Establishment** field, select “University of Wales”.
- It is unnecessary to check the **Primary alumni information** checkbox because you already designated the University of Nottingham as Melissa’s primary education record.

If you check the **Primary alumni information** checkbox here, a message appears asking you to select either the University of Nottingham or the University of Wales as Melissa’s primary education record because only one education record can be the primary education information for a constituent.

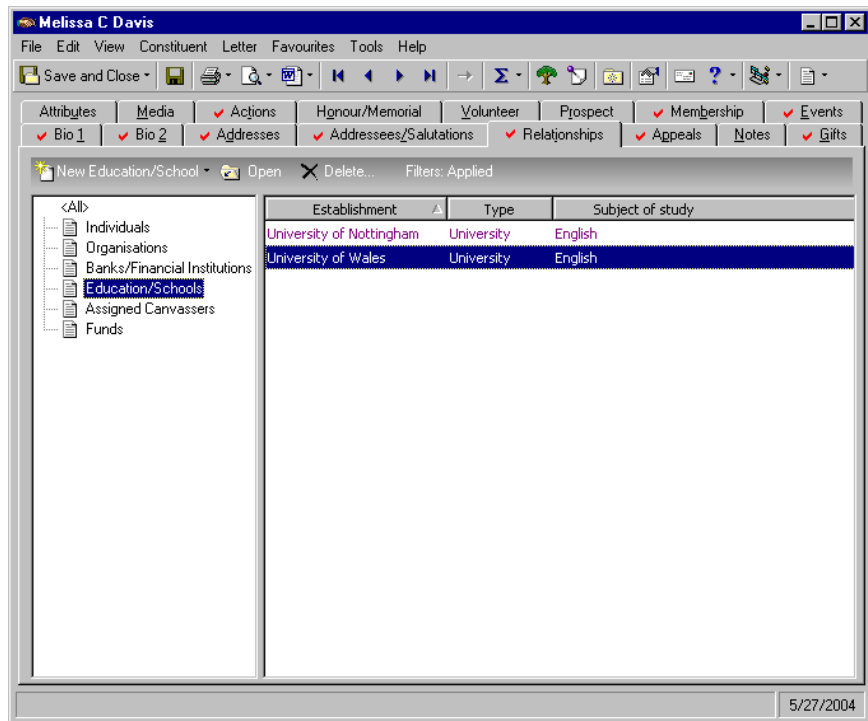
- In the **Type** field, select “University”.
- In the **Class of degree** field, select “First Class”.
- In the **Status** field, select “Graduated”.
- In the **Degree** field, select “MA”.
- In the **Class of** field, enter “1999”.
- Click **Save and Close** on the toolbar. You return to the Relationships tab of Melissa Davis’s record.

➤ Editing additional alumni information from the constituent Relationships tab



You recently found out that Melissa Davis was president of the Literature Society while a student at the University of Wales. You also learn that she gave presentations on childrens' literature at numerous university conferences. Add the new information to Melissa's alumna record.

1. From Melissa Davis's constituent record, select the Relationships tab. For more information about opening a constituent record, see "Navigating in Alumni Tracking" on page 3.



2. From the tree view on the left, select **Education/Schools**.
3. Select the education record for the University of Wales and click **Open**.

- Click the Attributes/Notes tab.

Education/School for Mrs Melissa Christina Davis

File Edit View Education Help

Save and Close

School Attributes/Notes

Attribute category: <All Categories>


Category	Description	Short Desc.	Date	Comments
Clubs	Literature Society		05/01/2005	

Notes:

Gave several presentations childrens' literature at university conferences.

Press F7 to zoom

- In the first row of the **Category** column, select “Clubs”.
- In the first row of the **Description** column, select “Literature Society”.
- In the **Notes** grid, type “Gave several presentations on childrens’ literature at university conferences.”
- Click **Save and Close** on the toolbar. You return to the Relationships tab of Melissa Davis’s record.

 When you set up your attributes in *Configuration*, and you select an attribute that contains a short description, the **Short Desc.** column on the Attributes/Notes tab is then enabled.

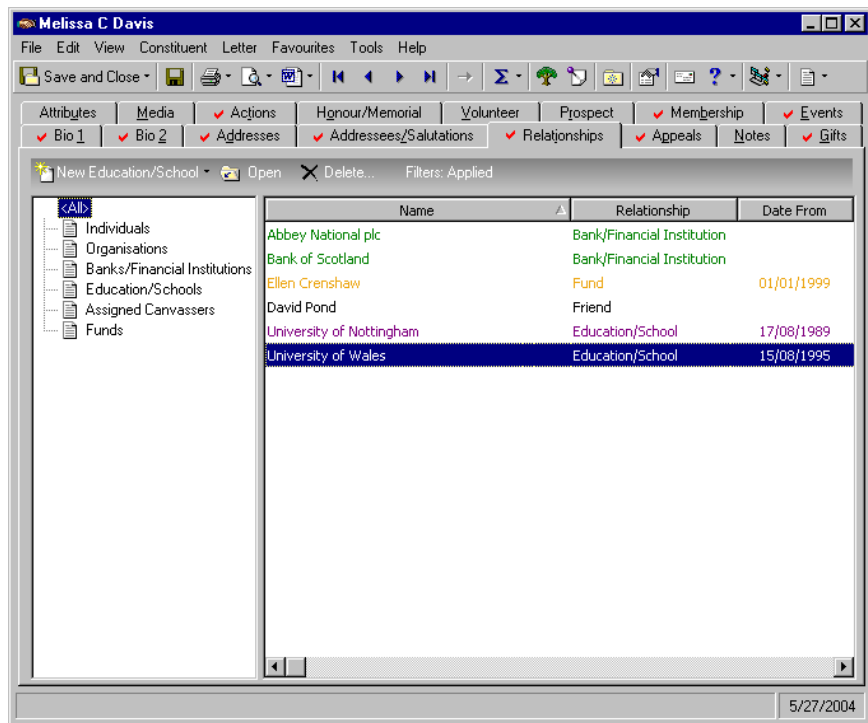
➤ Deleting additional alumni information from the constituent Relationships tab

Because deleting additional constituent education/school records is permanent, we suggest you print the information first to keep as a record.



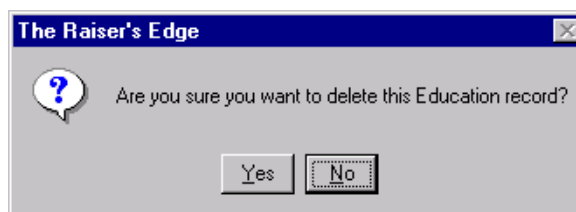
You are cleaning up your *Raiser's Edge* database. You realise you added the wrong establishment to Melissa Davis's education record. She did not attend the University of Wales. Delete the University of Wales education record from Melissa's Relationships tab.

1. From Melissa Davis's constituent record, select the Relationships tab. For more information about opening a constituent record, see "Navigating in Alumni Tracking" on page 3.



When deleting from the Relationships tab, you should view all existing education/school records to make sure you are choosing to delete the correct one.

2. From the tree view on the left, select **All**. You can now view all relationship information for a constituent.
3. Select the education record for the University of Wales and click **Delete**.
4. A message appears confirming your wish to delete the education/school record from your database.



5. Click **Yes**. The record for the University of Wales is permanently deleted from your database. You return to Melissa's Relationship tab.

Education/School Records for Individual Alumni Relationships

You can add education/school records for constituent individual relationships. For example, if Stephanie Smith is a relationship of Melissa Davis, you can add an education/school record for Stephanie Smith through Melissa Davis's Relationship tab.

For more information about adding education/school records for constituent individual relationships, see the *Constituent Data Entry Guide*



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