Alumni, Development and Career Modules
Documentation

Table of Contents

Introduction

The Campus Café Alumni/Development/Career Tracking web interface is a comprehensive series of functions designed to create an information system for alumni/constituent management activities, fund raising, and career tracking. The system provides access to constituent and fund-raising data through an integrated relational database. Based on appropriate permissions, the user will have access to related student, faculty, parent, and other data for a record obtained through the alumni/development People Finder. The functions in this module and the user interface are consistent with other modules within Campus Café. For example, web-based mail merge, email merge, exporting, pictures, workflows use the same interface throughout the Campus Café product suite. Documentation for mail merge is found in a separate document (available at www.campuscafesoftware.com) that serves all Campus Café areas regardless of module.

THIS MODULE INCLUDES:

- Constituent/Organization database that contains all biographical data on constituents. Searchable fields are provided to identify, target, and select/sort initial query data. It is important to note that organizations and persons are stored in the same database. The interface is slightly different for a person than an organization, but the basic principles remain the same.

- A relationship file is provided to show relationships between constituents and allow for cross matching of fund-raising data.

- Access to add pledges, gifts, matching gifts, in memoriam gifts, soft credits, and other transactions from the constituency management screen.

- Access to other information from the campus-wide integrated database. Depending on your permissions, this might include current and historical student data, current and historical admissions data, parent data, and any other data for which you permissions grant access. You can also have access to activity tracking and workflows from other modules. For example, athletic data might be stored in the student module, but access to this data can be granted through the tracking permissions interface. Consult with your administrator if you have questions about security and permissions.

Permissions Overview

The Café Web module is broken down into smaller parts (modules). This is necessary to minimize the number of restrictions that must be inserted into a security group. These modules can be thought of as roles within the security group. By creating a module level, it is possible to "permit" a module implicitly. The user is then only able to access the objects in that module. The security administrator may then remove or restrict the user from functions within that module as necessary.

The two basic levels within SYPOBJ security file are the module and the objects within that module. The module (or role) is given by permission. The functions within the module can be removed to restrict a user from that function.

Please be aware that some security object permission govern access in both the client and the web version of Café. For example, if a user has access to the transcript, then they would have access to it in both interfaces.

Additionally, the SYPOBJ contains a container group. This further categorizes the security objects into logical groups such as registration, systems, faculty options etc.

The current SYPOBJ object functionality has been broken down for Web into modules.

ALL	-	All	example - public course listing
SY	-	System	example - user account lookup
AL	-	Alumni/Dev	example – Gift listing

Specific page and field permissions are noted throughout the document.

Navigation

Campus Café Web offers a permission-based navigation system to enhance the user's ability to access functions within the Web interface. The navigation bar allows the user to easily navigate to any section of the application based on their security.
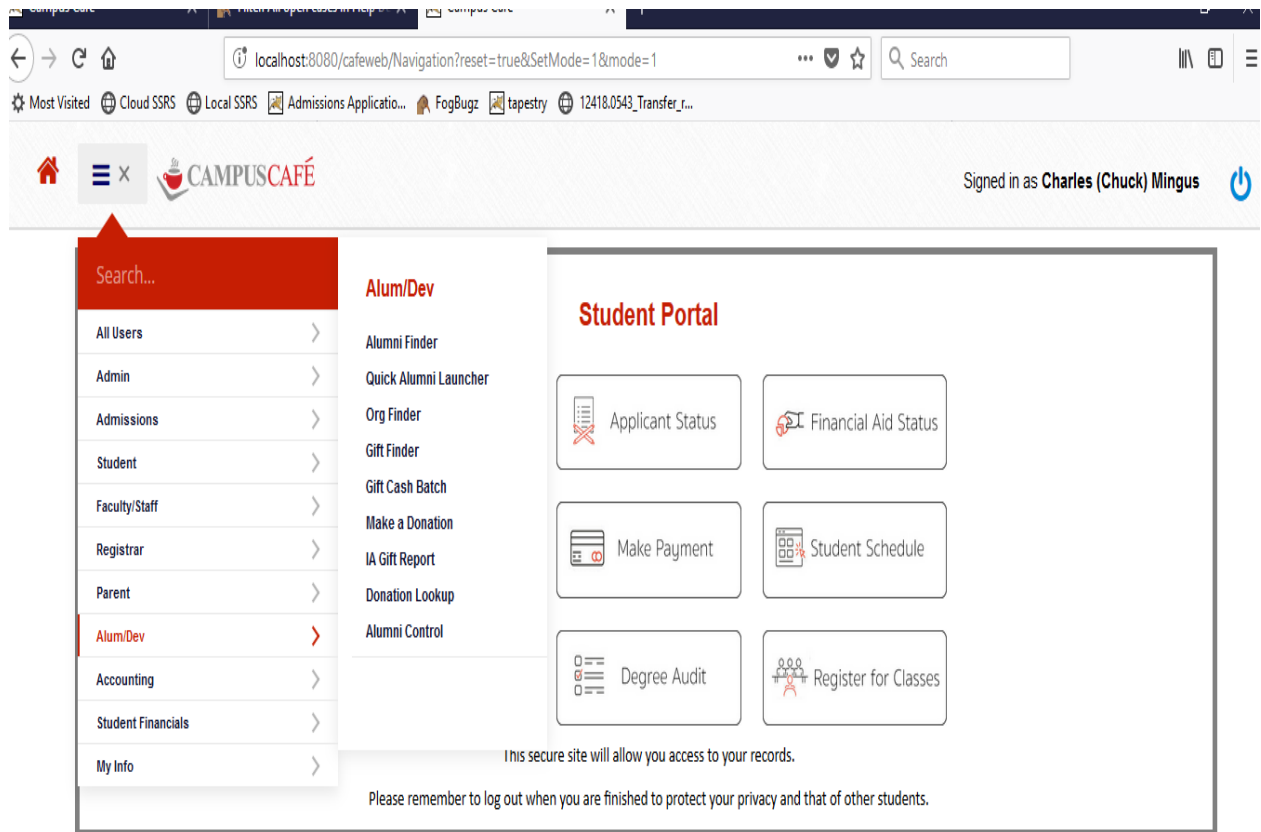
The navigation scheme is designed with two menus and three task sets. The three-bar Main Menu holds the modules and the sub menus hold the tasks for those modules.

The task set includes:

1. Non-person related tasks such as updating control and configuration files.

2. Other person tasks such as looking at a person's gifts, updating an address, viewing another person's tracking/workflow. This mode can only be accessed from a People Finder and launching the person. The only way to exit this mode is to return to the main menu or to the People Finder listing.

3. Self service (My Info) person tasks for yourself such as updating your own address or email. These tasks are accessed through the My Info link on the main menu. Once you are in this mode, the only way to exit is to return to the main menu.

Campus Café also permits navigation based on the landing page. The page can be customized with a Character Large Object (CLOB) stored in the database. An administrator may also include custom head elements via a new CLOB CUSTOM_HEAD_INCLUDE. The elements can be any valid head elements, but the primary purpose of this implementation is to give the customer the ability to control/include their own cascading style sheets and JavaScript. The style sheets can come in via the <style> element and thus be included right on the page, or they can be referenced via the <link> element whereby an external file will be loaded (the href, as always, must be absolute). The JavaScript likewise can be an external file or a snippet included right in the clob.

There are also user-defined areas for customizable web content. These CLOBs allow an administrator to add content through the Web Adjustable Text option on the Campus Café System Admin Menu, and then have that content appear within the web displays.

People Finder Concepts

There are six People Finders available for searching. These include Admissions Inquiry/Applicant, Student, Alumni/Development, Faculty, Parent, and All People. All display grids will show some common information such as first and last name to help identify the record. The other information on the display grid within each search page will vary and display information that is relevant to the group within each search. For example, on an admissions search, you would see progress code, entering semester, and inquiry date. On an alumni search, you might see class year, constituency, and solicitor. The query tool provided will allow you to search for groups of people using standard query logic. For example, if you select State (is one of) and list three states, then the result set will include only people with that state in their address field within the database.

IMPORTANT: The People Finder also has a defined number of results and a number per page function the user sets. This allows the user to alter the amount of data to retrieve. Campus Café recommends only retrieving the number of records needed for the current task. Increasing the search results to large number will affect system performance, so the default settings are typical for normal usage.

Below is the People Finder for alumni.

The various filters on the People Finder will allow you to segment and find various constituencies. For example, if you need a LYBUNT (gave last year but not this year) report, you could use the last year and current year giving parameter to get the report. You could further limit the LYBUNT to alumni in the last 10 class years.

The relationship search is also a helpful tool. You can search by any relationship type. Some examples might be Parents, Relatives, Employers, Solicitors, etc. See section on adding relationships for more information including setting up automated reciprocal relationships. Other key searches include the constituent codes and other code arrays to segment constituencies.

The **BROWSE** feature is a key element of this search tool. If you cannot get the specific list of people through the People Finder filters, you can "feed in" a list of ID numbers from another source in the form of a CSV file or spreadsheet. The source might be from an export of activity tracking items, an external query (Crystal Reports), or any other list of ID numbers. The ID numbers may appear more than once in the source spreadsheet, but they will be unduplicated when fed into the People Finder. The ID number input list may then be further filtered using the other filter fields on the finder.

Results

The result list will have the selected check box to the left of the row checked as the default. You may unselect certain records if you are performing a batch function on the group and wish to exclude certain records. Functions include mail merge, email, workflow, texting, pictures, export, etc.

Each column on the grid has a sort function that will allows reordering the data displayed within the grid.

The launch person function within the grid will allow you to drill down into an individual person's record. The landing page for the person will contain basic biographical information. Additional buttons on the person page will allow you to access other functions within the appropriate module such as viewing, updating, and deleting information for the person.

Common People Finder Functions

This section includes common functions in from the People Finder.

Add/Hide Columns

This function allows the user to view additional information in the results by adding or hiding columns. This can be used to better organize data and isolate columns needed for the current task. An export will only contain columns that included on the grid.

1. Click the Column Visibility button
2. Clicking a column name will show or hide the column

Rearrange columns by clicking and dragging the column to its new location.

Sort by column by clicking the column header.

Launch Person

Clicking the Launch Person link (assuming this column is visible) will bring the user to the person's Contact Information screen that shows basic information about the individual and allows navigation to additional information and functions related to that individual dependent on the user's security.

Export results

This function allows the export of the results to an Excel spreadsheet or PDF. Only rows and columns that are selected on the grid will be exported.
1. Click the Excel or PDF button
2. Depending on the user's computer settings the file will either open, download or prompt the user for guidance on whether to open or save the file.

Send text message

This feature requires the customer to procure a third-party text messaging vendor. Campus Café supports a native integration with Message Media. Once enabled and configured, a user with appropriate security may send a text message from the finder. Refer to the separate text messaging documentation for setup and detailed directions. It is recommended that the text include the name of the institution and/or sender to help the recipient identify the source of the text.
1. Click Text
2. User will be brought to the texting screen
3. In the Member: Template Name, select an activity tracking template
4. Optionally set additional criteria
5. In the message box, compose the text message
6. Click Submit
7. Wait until the system completes sending the message. Only users with valid mobile (MBL) phone numbers can receive a text message.

Email Selected People

A user may email the selected results on the People Finder either by feeding the emails into a local email software client (e.g. Outlook) or by using the Campus Café email client. The client relies on the customer configuring an email relay. In both cases, the system will return and email the email set as preferred.

CAUTION: Email vendors often set governor limits (caps) on the number of recipients per email or the total number of emails sent within 24 hours. Campus Café relies on the customer's email provider so questions should be directed to the email provider.

Emailing using local client
1. Select by checking the Selected checkbox the results you wish to email
2. Click the Email button
3. Click For Page Default or For All Default
4. Your locally installed email client will open and the emails will appear in the BCC line.
5. Compose and send the email as normal

Emailing using Campus Café
Ensure pop ups are allowed for Campus Café.
1. Select by checking the Selected checkbox the results you wish to email
2. Click the Email button
3. Click For Page Client or For All Client
4. A pop up will appear
5. Compose the email
6. Click send

Add tracking items-sending personalized emails/letters

This function allows the user to add a batch of items to the activity tracking system based on the people selected in the grid. For example, the user may wish to add a phone reminder to call the 10 people on list in 10 days.

This process relies on an administrator configuring activity items. For example, a school may pre-configure a form called PHONE10 that will contain a phone reminder that will be due in 10 days.

Leverage pre-existing activity or workflow
Follow these directions if the activity does not involve sending an email or if the activity is preconfigured with an associated workflow that sends an email.

1. Select by checking the Selected checkbox the results you wish to add activity to
2. Click Add Activity
3. Choose Add for All or Add for Page
4. In the Member: Template Name, select an activity tracking template

5. Optionally tie the activity to a specific semester. This might be useful if the activity relates to a specific class in a specific semester or financial aid for a specific semester.
6. In the Add Only For These People box you can choose whether to send the message to everyone selected, only those that do not have the activity tracking item or only those that do not have the item for the set semester.
7. Optionally add a comment
8. Optionally assign a user
9. Optionally add a long comment
10. Click Submit

Contact Information Panel

This panel contains basic information about a person in the database.

Access can be controlled using permissions as described below:
- Permission 358 governs access to the contact page for Person Selected access.
- Permission 1050 governs access to the contact page for My Info access.
- Permission 718 governs access to the contact page from within the Parent module.
- Unless these permissions are N/A, then the user will see the contact page for the appropriate context. Various permissions (Container = Contact Information) then govern access to viewing the other information sections on the contact page. For example: Permission 507 governs the Show Contact Information Picture for My Info access. Permission 1023 governs the Show Contact Information Picture for Person Selected and Parent access.

Emergency Contacts

The emergency contacts screen shows those individuals to contact in the event on an emergency.

The field Emergency Contact Priority on the Relationship Page governs whether a record will appear in the Emergency Contact Information section. If that field is left as 0, then the record will not be displayed. A numerical value will display the record and order the records by contact priority. The following information will be displayed: full name of the contact person, their phone number, mobile phone, email, relationship to this person, the emergency contact priority in case there are multiple contacts, and a comment.

Access can be controlled using permissions as described below:
- Permission 359 controls access to the Emergency Contact Information for My Info Access.

- Permission 1034 controls access to the Emergency Contact Information for Person Selected and Parent Access.

Relationships

The relationship record contains data elements that govern the display of relationship information on the contact page.

Access can be controlled using permissions as described below:
- Permission 471 governs display of the Parent/Relationship Information Section for My Info access.
- Permission 1020 governs display of the Parent/Relationship Information Section for Person Selected and Parent access.
- Permission 655 governs the display of the Release Codes for My Info access.
- Permission 1025 governs the display of the Release Codes for Person Selected and Parent access.
- Permission 472 governs the display of the Address/Phone information within the Parent/Relationship Information Section for My Info access.
- Permission 1027 governs the display of the Address/Phone information within the Parent/Relationship Information Section for Person Selected and Parent access.

Relationship fields

In addition to the biographical data contained in the Parent/Relationship Information section, the following fields also govern the use and display of this section.

- Hide on Contact Page. If this box is checked then that record will not be displayed. This record can then only be viewed through the relationship tab.

- Info Release Code. This field is used to designate the release level for the person specified in the relationship. If the field is left blank, it will default to "release no information". This field is checked to ensure that information is not released to the person specified in the relationship, unless appropriate.

- Info Release Code Spouse. This field is used to designate the release level for the spouse specified in the relationship (if any). If the field is left blank, it will default to "release no information". This field is checked to ensure that information is not released to the spouse specified in the relationship, unless appropriate.

- Secondary Relationship Type. This field is used to designate a secondary relationship for the contact. For example, the relationship type might be "Guardian" or "emergency contact", but the secondary relationship might be "Aunt".

- Preferred Parent. This box is used to specify the preferred parent. This information is used in subsequent processes such as mailings and grade access to

define which parent has primary access to the student record. This is generally used where parents are divorced or separated and have individual records.

- Billing Parent. This box is used to specify which parent receives the billing statement. This is generally used where parents are divorced or separated and have individual records.

- Start Date and End Date. These dates are used to specify the beginning and ending dates for the relationship. Some examples would include start and ending dates for an employer or start and ending dates for a release code.

Adding Relationships

Relationship Types

Relationship types (codes) are defined using STParm MRRLCC. Once created, the admin servlet must be run for the relationship option to appear.

Relationship reciprocals

Reciprocal relationship rules will automatically create a relationship between two relationship types. For example, if someone is indicated as a wife of the original person, you can automatically create a husband-wife relationship.

Define reciprocal relationships
1. Navigate to Regisgtrar → Relationship Reciprocals
2. Choose the primary relation
3. Choose the reciprocal relation
4. Choose the primay gender
5. Choose rthe reciprocal gender
6. Check active to make the relationship live in the system
7. Check add reverse in order for the rule to apply in reverse
8. Click Submit

Relationship types

There are two relationship concepts in Campus Café.

1. **Non-database relationships** are where information about the other person/organization is stored in the original relationship record itself. Non-database relationships might include alumni/children where the user might want to list the children of alumni, but not create a separate, detailed database record for each child.
2. **Database relationships** relate to another person/organization in the database. Examples of database relationships might include parent/student, husband/wife, where both persons already have their own unique records established and detailed information is required for both parties.

Spouse relationship considerations

Campus Café supports storing limited spouse information within a constituent record as a **non-database relationship**. If more information is needed, a related person can be set up as a **database relationship** with storage of biographical data, employer data, etc. and ancillary data like gifts, enrollments, billing. Campus Café recommends not creating a separate database record for the spouse if only the below basic information is required.

Information stored on the original constituent's Bios screen
First Name
Last Name

Middle Name
Salutation
Suffix
Nick Name
Maiden Name
Former Name
Marital Status
Gender
Date of birth
Date of death
Deceased code

Information stored on the original constituent's Email Address screen
Email Address (use type SPEMAIL)

Information stored on the original constituent's Address/Phone screen
Phone Number (use type SMB – spouse mobile)

When to create a separate record for the spouse
If the spouse needs his or her own person record (e.g. he or she was a student, a donor, or have some other relationship where you need to track other information like employer), then a relationship should be set up with a separate person record.

Only three relationship types are allowed for related spouse records: HUS(Husband), WIF(Wife), SPS(Spouse). If a spousal relationship is set up using one of these codes, then the People Finder will automatically override the data on the grid and in the download to the related person's data. If there is not a related record, then the spouse fields will be populated with the data entered on the Bios page for the constituent.

Create non-database relationship for spouse

1. Launch the original constituent
2. Navigate to Person Selected → Bios
3. Enter the spousal data in the spouse fields
4. Click Save

Create database relationship

1. Launch the original constituent
2. Navigate to Person Selected → Relations
3. If the related person is already in the system, click Lookup Person to find the person. Otherwise leave the Lookup box empty
4. In the Add Relation Type box, choose the relation
5. The add reciprocal relation is checked by default, but will only add the reciprocal if it is set up.
6. Click Add Relationship
7. Enter information for the related person

8. Click Save

Gift Finder Concepts

The gift finder is a useful tool for gathering lists of donors by multi-dimensional criteria.

Example 1: you want to search within a date range for any donors that made a direct donation or had a donor advised fund gift through another entity.

Example 2: you want to search for any donors that made a donation in fiscal 16,17,18, but have not made a donation in fiscal 19 or 20. This would require a two part search where you would get a list of the donors for 16-17-18. Then you would use the send to ID_Number field function and further limit that list to donors who gave 0 in fiscal 19 and 20.

Example 3: you want a lybunt report of donor who gave last year but not this year, but only within the annual fund.

These types of queries and many others can be done through the gift finder. The resulting ids can then also be sent to the Alumni or Org finder to access all other information about the constituents.

Web Based Mail Merge feature for documents and Email

Please refer to the separate manual Web Based Mail Merge Setup for instructions on setting up mail merge, email merge, and a list of mergeable fields to be used in merge documents.

Tracking and Workflow System

The tracking and workflow system is the cornerstone of the communications and workflow management solution within Campus Café. This system allows the user to create **templates** that can contain comments, scheduled items such as interviews, and workflow items in a timed sequence. **Tracking/Workflow templates, and queue results can be created from the All Users menu on Café Web. The below tracking help text and examples are specific to the alumni/development module. Please refer to the student service help documentation under "Campus Café Web activity tracking and workflow system" for additional general documentation on activity tracking set up and configuration.**

Once a template is created, the information in the template can be used as a default in a tracking record added for an individual person. The tracking record may contain comments, scheduled items such as interviews, and also a timed sequence of workflow items. In the example below, the workflow contains a Thank You letter and is configured to notify the director whenever a thank you letter is sent. It is also configured to note the name of the donor (tracked person) in the email.

Work Flow Definition Detail:

Id#:797 Tracking Member:ALUMNI Name:PHONATHON

Type	Category	Description
DOCUMENT - Document	A - Activities	PHONATHON

Options

		On Add	
Can Add Attachment on Adm App Status or Fin Aid Status Page:	☑	Assign User:	☐
Is Word Mergeable:	☑	Mark Completed:	☐
Is Gradeable:	☐	Email Tracked Person:	☐
Is Queueable:	☐	Email Advisor:	☐
Prereq Usage:	☐		
Print on Degree Audit:	☐		

On Add

Email

Default Email Address On Add:
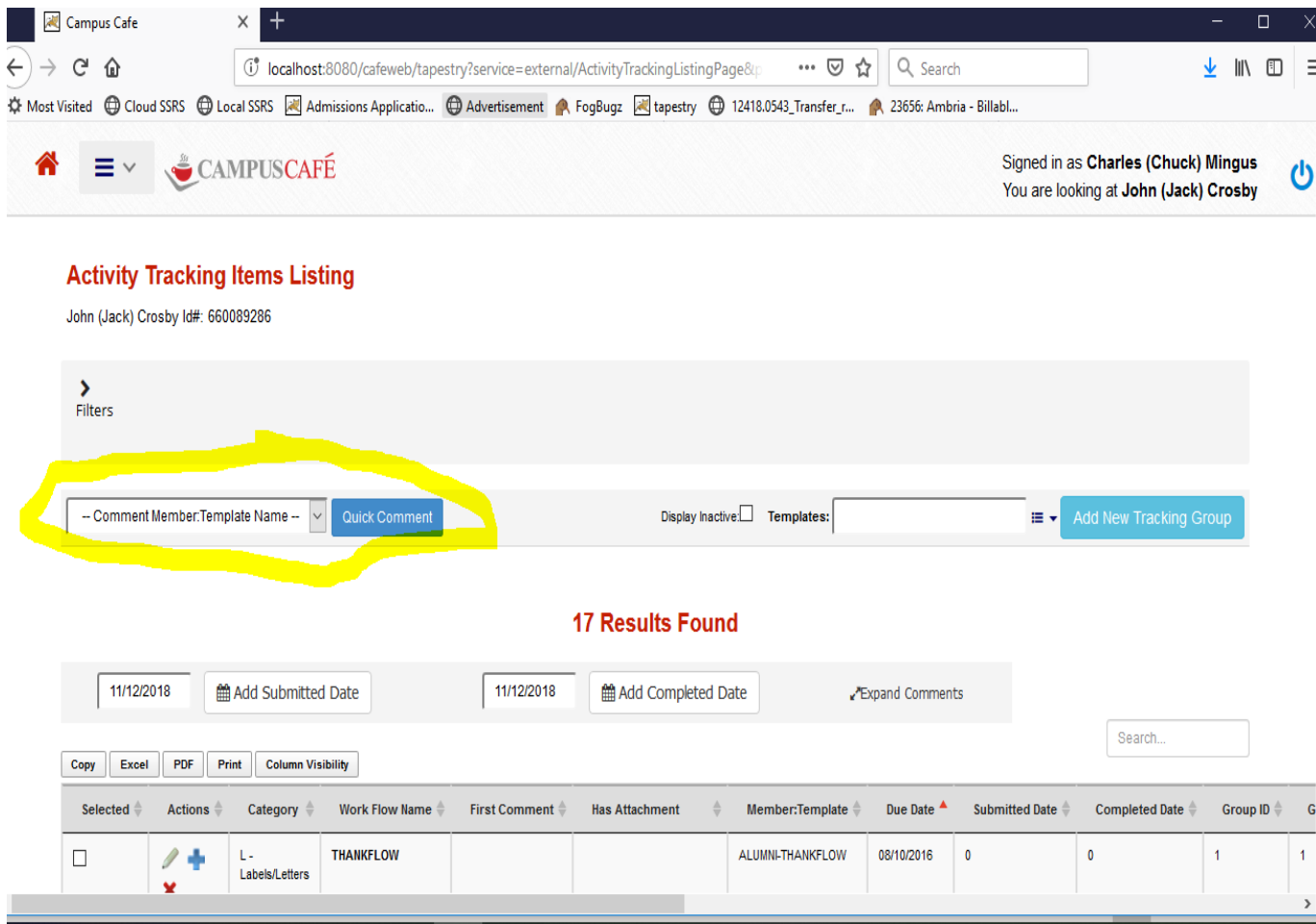
🗑 Delete   ← Cancel   💾 ← Save & Back   💾 Save

Quick Comment Feature

The default member comment check box in the template allows the user to designate a default for the QUICK COMMENT feature within document tracking. This feature allows the user to add a comment directly from the tracking grid without having to look up a template. More than one template can be designated as a quick comment. Each tracking record will allow the user to enter short and long comments. The text in the long comment can be emailed to the constituent and others. Attachments can also be linked to each tracking record.

Activity Tracking Search

The activity tracking search page allows for flexible filtering of tracking items. In the example below, we are searching for contacts for the purpose of cultivation. The reason is planned giving for amounts of at least $1,000.00. This will allow the user to find various constituencies that may not be searchable in the People Finder. In essence, you can add tracking filters to customize your particular environment. The drop downs for the activity tracking are user definable and it is possible to add other codes as needed to segment groups of constituents.

The Edit Tracking Button allows you to add comments or additional workflows and other information to an existing tracking record or delete the tracking record. This may be useful if you wish to override the default dates or settings created from a tracking template. For example, a template is created and schedules a phone call for May 10 and May 17. You do not reach the person until May 16 and you want to reschedule the subsequent call for May 24. You can click the Edit Tracking button next to the workflow item and change the dates as well as any other information in the tracking record. You may also use the result queue to close the item and automatically create a call back reminder several days or weeks out.

The launch person button will allow full access to the person record based on your permission group.

You may wish to filter or sort the workflow items. Use the filter boxes at the top of the page to filter tracking items. The blue links above each column will allow you to sort the list by that column value. This sorting and filtering might be used to get scheduled phone calls together for a particular task.

Use the select and deselect buttons to select groups of workflows for batch updating. You can also select and deselect workflow items manually one at a time.

You may also wish to mark a group of workflow items as done so they will no longer appear as open workflow items. Clicking the mark workflows done button will update the done flag for all workflows selected in the grid. You will receive a warning message that must be answered to complete the operation. Conversely, you can mark a batch of workflow items as undone. This can be particularly useful if you need to reprint or merge a group of workflow items. The mail merge function will automatically mark selected workflow items as done.

You can also add a workflow item to a set of existing tracking records. For example, you invite 1000 alumni to a reunion. 100 people respond and they are coded with a scheduled date within the tracking record. You now filter on the remaining 900 tracking records that have do not have a scheduled date and you wish to add a new workflow item called invite2 to each of the 900 records. This function will allow you to batch add these workflow items. One and only one workflow list can appear on the grid for this function to work. An error message will appear if this is not the case.

Individual Tracking Items can also be added through this interface. Use the Member/Form Number box to select the tracking item that you wish to add for the person. One and only one check box must be checked on the grid for this operation so the system will recognize the correct person to add the record. An error message will appear if this is not done.

There is also an adjust columns function that will allow you to hide or not hide various information on the grid to control the amount of information to make the current task easier. The settings will be saved until the adjust columns interface is updated.
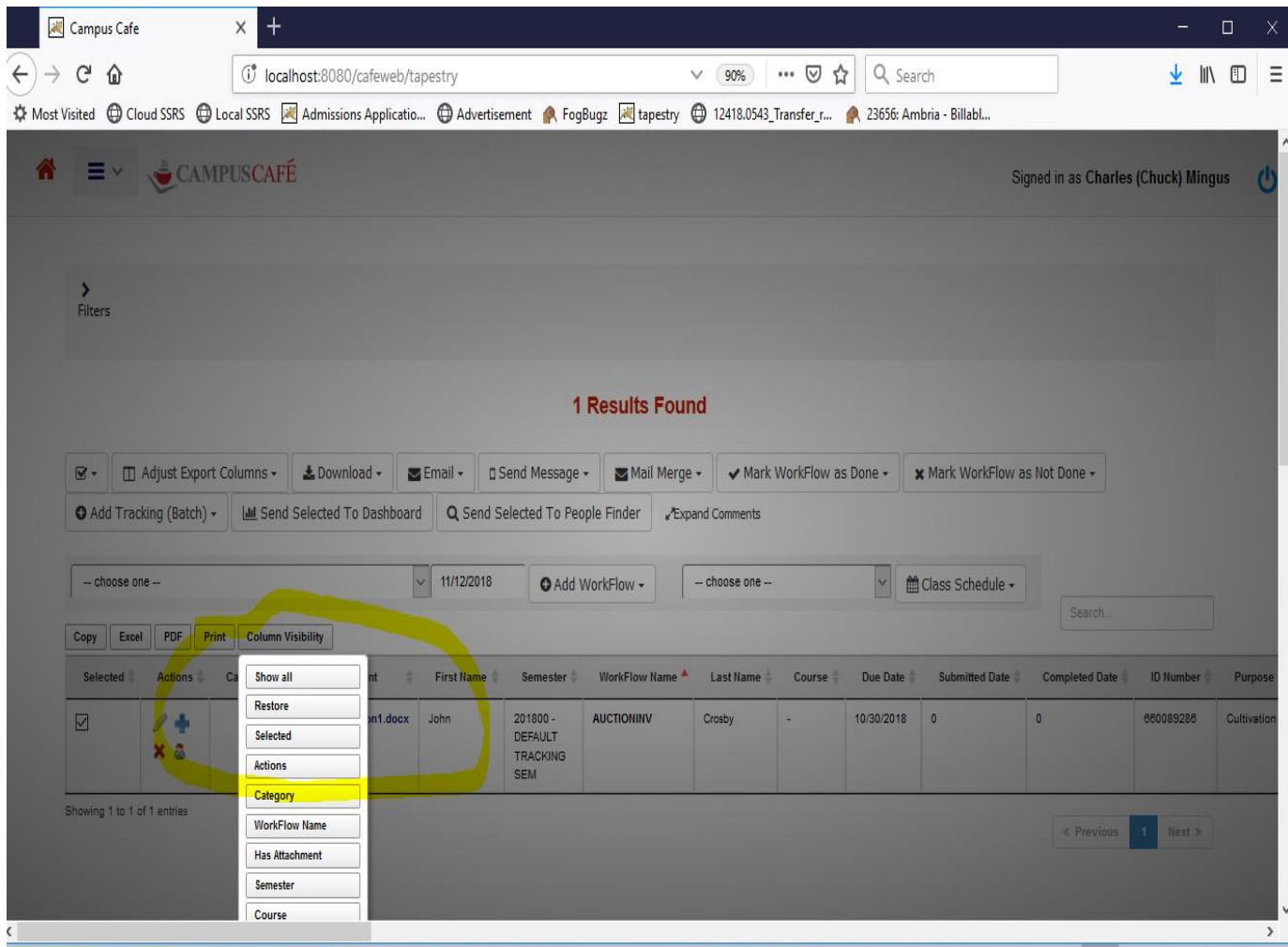
How to set up workflow items

Workflow items can be thought of as tasks to be completed such as phone reminders, emails, visits, and letters. These items are included in a tracking record as part of a workflow. Before including a workflow item in a tracking record, you must first define the workflow item in the workflow item master file ADWFMS. There is an interface on the Café Web administrative menu that is used for this purpose. See full activity tracking documentation in the student services module for additional instructions and information.

Online Donation Portal

The Campus Café Donation Portal is designed to make giving a seamless process within the integrated gift, receipts, and general ledger system. There are two modes available for the donation portal.

Internal User

The portal can be configured as a link on the Campus Café menu system. This would allow a user who is logged in to make a donation. This could be a parent, staff member, faculty, student, or anyone else with a log in. All donation activity is captured in an audit table called AL_ONLINE_DONATIONS regardless of whether the payment is made successfully. See further details below on retrieving this data. Successful payments will automatically create the appropriate records in the alumni/constituent cash batch system.

External User

The portal can be presented as a link on your web site or anywhere else the URL is placed. This would allow a user who **is not logged in** to make a donation. This could be new constituent or a constituent who has a prior affiliation with the organization but is not logged into Campus Café. These donations are stored in table AL_ONLINE_DONATION and can be later "matched" to the appropriate constituent in the database. Once the match is made, the payment will be created in the alumni/constituent cash batch system.

Usage Notes for Donation Entry

Choose where to Direct Your Gift. These drop downs are based on entries made in table AL_CASH_TRANSLATION. This table can be updated through Café as displayed below. Gifts may be split up to three ways for different designations (gift purposes). The gift purpose(s) selected is automatically placed in the cash batch record(s). This will also ensure that the gift has the proper general ledger number(s). When the cash batch is posted, the records created in the business office will also contain the gift purpose field. This field is visible on the web based general ledger detail lookup.

AL Cash Translation: AVIATION

Cash Translation

Description | Aviation Events

Cost Center-GL Account | 2009-04135

Edited On 12/30/2014 By JS

Created On 02/11/2014 By JS

Fund Type | CAPRES

Inactive Code ☑

| Delete | Update | Back |

No Changes Pending

Successful Payment

All payment attempts are stored in table AL_ONLINE_DONATIONS. Successful payments for users logged into Campus Café are moved to the alumni/dev cash batch for the day. Successful payments for users who are not logged in must be matched with the proper constituent and that can be done using the Donation Lookup Page detailed below.

Donation Lookup Page

This interface is used to match donations with constituents when the donation is made from outside of Campus Café (user is not logged in). If the constituent cannot be found, then they may be added and then matched accordingly. This page can also be used to view donations that were unsuccessful (credit card payment did not go through or was canceled by the user etc.). The information contained in the record can potentially be used to contact the donor to resolve the payment.

To reach the donation lookup page
1. Navigate to Alumni/Dev → Donation Lookup