



Scholastic ONline Information System
for the Web

Development and Fund Raising

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SONISWEB® development functions – also known as fund raising – are described in this text. SONISWEB® records volunteer activities. It keeps pledge and payment records and records funds received, whether cash or other valuables. It racks volunteer activities by constituents. This text covers adding constituent records, making constituents of current alumni/ae, faculty, and students, and setting up the activities and events in which constituents participate.

April 2008

 *Systems, Inc.*

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NEW IN THIS EDITION

April 2008

- “Figure 35 User Security”, page 25 corrects the caption for the figure.
- “Fundraising Report”, page 56 to reflect the new name for the function in Version 2.1. Figure 2 was also revised with the new name.

NAVIGATING THE FUNCTIONS



• Figure 1 Toolbar¹ for those with User-ID access

Administrative users have User-IDs and Passwords and see an initial display like Figure 1. Administrative users can be anyone in your system with an ID but typically they're paid Staff and those few Faculty with additional administrative duties.

The access rights of an administrative user are defined by:

1. The **Profile** selected when you were issued a User-ID and Password. Typical Profile categories are the Registrar, the Registrar's staff, the Financial Officer, Admissions staff, Deans, etc. One profile covers all the people in each staff category.
2. The individual limits specified for you when you were issued a User-ID and Password. Typical limits are preventing access to faculty and staff personal records.
3. The **privileges** added for you when you were issued a User-ID and Password. The right to "Make Grades Official" or "View and Change PINs" are examples.
4. When you click an item in Figure 1, you get the appropriate choice shown in Figure 2.



• Figure 2 Function Lists¹ - Partial

¹ You only see what you're authorized to see by your Profile and individual Limits and Privileges, so your choices may be fewer than these.

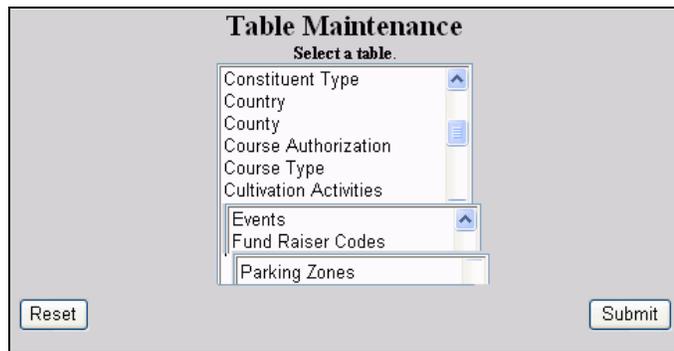
Accessing Table Maintenance

Starting on page 35 several of the tables you must use are accessed by clicking Table Maintenance in Figure 2.

1. Log in to SONISWEB® as an administrator. See “Getting Started - Log in and the use of Tabs, Button and Fields” on page 64 for guidance.
2. Click **Systems** at the top of your display (see Figure 1). You see Figure 2 on the left of your display.
3. Click Table Maintenance in Figure 2. You get Figure 3 which is a collage of the table list. You scroll through the table names to find the one you want to process.

If you know the name of the table you want to access, you get to it quickly by clicking the first name in the list (Figure 3), using your keyboard to enter the first letter of the table you want, an E for the Events table, for example. SONISWEB® “jumps” down the list to the first table starting with that letter.

4. Click the name of the table in Figure 3 then the Submit button to see the table.

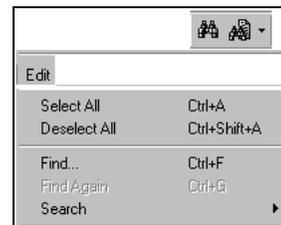


The screenshot shows a web interface titled "Table Maintenance" with a sub-header "Select a table." Below this is a list of table names: Constituent Type, Country, County, Course Authorization, Course Type, Cultivation Activities, Events, Fund Raiser Codes, and Parking Zones. The "Events" table is highlighted. At the bottom left is a "Reset" button and at the bottom right is a "Submit" button.

• Figure 3 Table List Collage

WHAT DO YOU WANT TO DO?

- Add a constituent status to an existing person's records, page 30.
- Add a new constituent who is not already in your records on page 28.
- Assign user security for volunteer access to your system, page 25.
- Check payment history, page 20.
- Check pledge balances, page 14.
- Enter a pledge, page 20.
- Enter pledge payments on page 21.
- Print and/or view reports, starting on page 54.
- Set up the tables used in development and fund raising, starting on page 35.
- Update constituent records such as addresses and other information, starting on page 11.
- If you don't see what you need above, check the table of contents on page 2. You can also use the Adobe® find or search functions illustrated in Figure 4. It allows a Google®-like search² by word or phrase.



• Figure 4 Adobe® Find and Search

Diagnosing and Fixing Problems

See the text “Messages, Errors, and Diagnosis”.

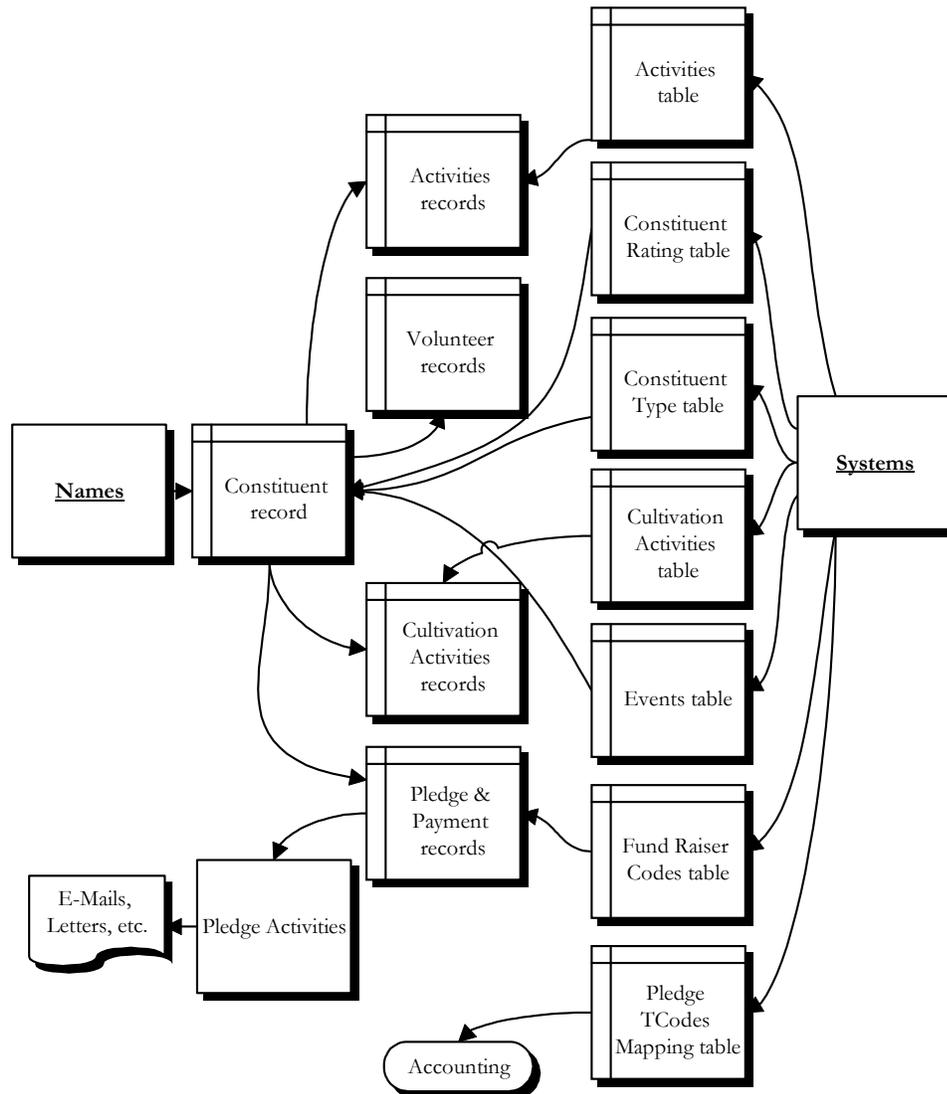
Setting Your Browser for Proper Function and Security

Internet Explorer³ (IE), Firefox™, Netscape®, and Opera Web browsers have an “auto-complete” or password-form save feature that is handy for individual computers but defeats privacy on shared computers like those in computer labs and libraries. See the text “Browser Settings” to set your browser for security, good performance, and to prevent your getting old data.

² If you're unfamiliar with this searching, click Adobe® reader Help or see the SONISWEB® text “Index to Texts”.

³ Only Internet Explorer (IE) version 5.5 or later is supported for administrative use.

PLEDGES, PAYMENTS, AND VOLUNTEER ACTIVITIES



• Figure 5 Record Relationships⁴

Most of the time, you work with constituents' records. You access those record using the **Names** function shown on the left in Figure 5. The selections from the function list are shown on the left in Figure 2. They appear just as other people-records do in SONISWEB®. How to do it is covered in “Entering Payments, Pledges, and Volunteer Commitments” on page 9.

You can add new constituents, make constituents of current alumni/ae, faculty and students, and maintain their records as described in “Entering New Constituents and Editing Their Records” on page 28.

⁴The actual record relationships are more complex than shown. Trying to show all of them would create an unreadable “spaghetti” chart!

Constituents make pledges to, and volunteer for, Events as shown in the center of Figure 5. Systems and the Table Maintenance functions are used to set those up. You see them in Figure 5 on the right. That is described in “Setting Up ” on page 35.

Terms Used

Constituent is a contributor to your institution via pledges and/or time volunteered. A constituent is most often an alumnus or alumna as well. The status code used in SONISWEB® is CO (see Status below).

Activities: these are usually the tasks that you assign to your staff and you want to track. With activities you can:

- Share an activity among faculty, alumni/ae, etc. Cultivation Activities and Events (see below) are not shared. Since activities are used throughout SONISWEB®, a single activity can be shared with students, faculty, constituents, “alums”, applicants, and prospective students. A local recruiting meeting with prospective students led by alums and constituents is an example.
- Print activity tracking reports to show what has been done and what needs to be done.
- Create activity-specific mail-merge files such as a mailed invitation for the President’s Circle luncheon.
- Record one-time tasks that the constituent has agreed to do (or you hope to talk him or her into), activities such as to review new building plans or to serve as the commencement speaker.

Cultivation Activities: these activities are done for the constituent to elicit deeper involvement with your institution. Ideally they result in activities, pledges, and/or volunteer commitments.

Events: these are fund drives that a constituent pledges to or a task that a constituent volunteers for. Common events are the “Annual Fund Pledge”, the “Annual Fund Call-a-thon”, the “Centennial Celebration”, or the “Graduate-Medical Student Apartments Fund”.

Volunteer: these are on-going tasks such as calling alumni/ae for funds, tutoring, or serving as an officer in a society of the school. They are tied to an Event.

Pledge: this is the commitment of a constituent to provide funds whether one-time or on-going. It is usually tied to an Event.

Pledge Activities: these are standard **Activities** that are triggered when a pledge, a payment, etc. is made.

Pledge Payments: these record payments against pledges as well as one-time payments.

Payment History: this shows the pledges and payments both pledge and one-time.

Balances: these show the balance for the pledges.

Status: this appears in name searches (Figure 6) and in biographic records (Figure 46). It states the role or roles that the person has in your institution. Some may be only constituents (status of CO). Some will be “alums” (AL) and faculty (FA) as well as constituents (CO). No matter the number of roles, each person has only one set of records.

ENTERING PAYMENTS, PLEDGES, AND VOLUNTEER COMMITMENTS

• Figure 6 Name Search

1. Log in to SONISWEB® as an administrator. See “Getting Started - Log in and the use of Tabs, Button and Fields” on page 64 for guidance.
2. If you want to enter a new person in SONISWEB®, see “New Constituents” on page 28.
For an existing person, enter her or his ID or as much of the name as you know, then click the Search button.
3. If you know the person is a constituent pick it in the “Record Status” in Figure 6 to limit the size of the list you get.

Name Search							
Name	PID	Status	Division	Campus	Dept.	Level	
<input checked="" type="radio"/> Abbott, Edgar M.	333333334	Constituent	Daytime	Centerville Main Campus	Liberal Arts	Not Applicable	
<input type="radio"/> Anderson, Anna	AN8321568	Constituent	Evening	To Be Determined	Science & Technology	Senior	
<input type="radio"/> Applegate, Cynthia H.	909090909	Constituent	Evening	Centerville Medical Campus	Nursing & Allied Health	Senior	
<input type="radio"/> Colt, Yancy	CO6303485	Constituent	Daytime	Centerville Main Campus	To Be Determined	Not Applicable	

• Figure 7 Names List

4. Figure 7 shows a list returned by the search process. Click the radio button⁵ beside the name you want to see, then click the View button.

You see a display of one of the many records in this person’s file. On the left of the display (Figure 102, page 64) you see a list of functions you can do with a constituent’s record. The left list in Figure 2 is typical.

The functions are listed in alphabetical order on the left in Figure 2. See “Terms Used” (page 8) for the definitions.

Since many of your constituents have multiple roles (statUSES) in your institution, the list you get may look more like Figure 8 than Figure 7.

⁵ See Figure 103 and the description on page 65 to see how to use radio buttons, check boxes, and pulldown menus.

Name Search							
Name	PID	Status	Division	Campus	Dept.	Level	
<input checked="" type="radio"/> Abbott, Edgar M.	333333334	Alumni	Daytime	Centerville Main Campus	Liberal Arts	Not Applicable	
<input type="radio"/> Abbott, Edgar M.	333333334	Constituent	Daytime	Centerville Main Campus	Liberal Arts	Not Applicable	
<input type="radio"/> Abbott, Edgar M.	333333334	Faculty	Daytime	Centerville Main Campus	Liberal Arts	Not Applicable	

• Figure 8 Name List with Multiple Statuses

- If you want to access the constituent records, select that choice from the list in Figure 8, then click the View button.

Starting on the next page, the Records shown in the left of Figure 2 are in alphabetical order:

- [Activities](#)
- [Address](#)
- [Balances](#)
- [Biographic](#)
- [Constituent Information](#)
- [Cultivation Activities](#)
- [Employment](#)
- [Interests](#)
- [Licenses](#)
- [Parking](#)
- [Parking Incidents](#)
- [Payment History](#)
- [Pledge](#)
- [Pledge Payments](#)
- [Relationships](#)
- [User Security](#)
- [Void Pledge/Payments](#)
- [Volunteer](#)

Activities by Individual

If you want to assign one or more activities to a whole group, use “Adding Activities for a Group” on page 33. It is quicker and simpler then assigning them one individual at a time.

Activities are not for constituents only. The activity list includes those for alumni/ae and applicants as well. See “Setting Up ” on page 35 for more information on them. For constituents, they are used mostly to:

- Track staff preparation via the activity reports described in “Activity Reports” on page 54.
- Produce a mailing as illustrated in “Mail-Merge, E-Mail Merge, Mailing Labels, Timed Letters, and Timed E-mail” on page 61.
- Track an activity that the constituent has volunteered to do.
- A combination of one or more of these.

Pledge Activities (see page 49) are standard activities that are automatically triggered when a pledge is made, a payment received, etc.

1. Click Activities in the left list in Figure 2. If the person has no activities scheduled, you get a display like Figure 9.

Activities			
Activity	Activity Date	Date Completed	Date Stopped
<input type="button" value="Add"/>			

• Figure 9 Add Activities

2. Click the Add button to get a display for selecting an activity. It is an empty version of Figure 11.

Where one or more activities are already present, the display is similar to Figure 10.

Abbott, Edgar (Constituent - 333333334)			
Activities			
Record 11 - 20 of 25			
Activity	Activity Date	Date Completed	Date Stopped
<u>Acceptance Letter</u>	01/28/2005		
Catalog	01/28/2005	01/28/2005	
<u>Annual drive thank you</u>	07/01/2005	12/01/2005	
Mail Merge	11/21/2005	11/21/2005	
<input type="button" value="Previous"/> <input type="button" value="Add"/> <input type="button" value="Next"/>			

• Figure 10 Existing Activity

3. Click the Add button or the underlined name of the activity; Figure 11 appears.

For alumni/ae and students you’ll also see activities he or she has that are not related to being a Constituent. The recorded history of a person stays in the records no matter her or his current role or status.

• Figure 11 Activity Details

4. In Figure 11, select the activity with the pulldown⁵ arrow. That pulldown provides a long list⁶ of all of the activities built in “Setting Up ” (page 35).
5. Fill in the remaining fields in Figure 11, then click the Submit button.
To clear what you have entered to start over, click the Reset button instead of the Submit button.
6. To remove an activity, click the Delete button (not shown in an Add display like Figure 11). You will get a confirming display asking if you really want to delete this activity. If you pressed the button by mistake, you stop the deletion by clicking the Activities button on the function list shown in the left list in Figure 2.

Address

People in the database have one shared set of address records that are needed for any mailings and e-mail notes as described in “Mail-Merge, E-Mail Merge, Mailing Labels, Timed Letters, and Timed E-mail” on page 56.

1. Click Address in the left list in Figure 2. You see Figure 12.

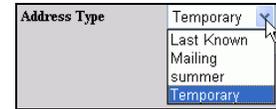
Address								
Record 1 - 2 of 2								
Address Type	Preferred	Street Address	City	State	Zipcode	Known Bad	Labels 1	Labels 2
Primary	Y	15275 New Garden Way	Carraras	NC	28111	N	N	N
Billing	N	333 Settlers Hill Rd	Woodbury	CT	06798	N	N	Y

• Figure 12 Address List

2. Click the Add button in Figure 12 to add a new address. People can – and usually do – have more than one address.

⁶ If you know the name of the item you want, you can get to it quickly by entering the first letter of the item you seek. The list will “jump” to the first item that starts with that letter.

When you add an address, you must select the address type from the pull-down⁵ list as shown in Figure 13. Those choices are set by your SONISWEB® administrator.



• Figure 13 Address Type

- To change an existing address, click its under-line “Address Type”. That yields Figure 14.

• Figure 14 Address Record

- You modify Figure 14 as needed.
- Click the Reset button to erase what you entered so you can start over.
- Click the Submit button to save the changes.
- If the record in Figure 14 is not the Preferred address, there is a Delete button at the bottom to remove the record.

Every person must have an address record marked **Preferred** **Yes**. That preferred address is used for most mailings. You change the preferred address by selecting the one from Figure 13 that you want to be the preferred address. That record will have a **Preferred** checkbox. Check it and you’ll be asked if you really want to change the preferred address. Respond affirmatively and it changes.

Balances

1. Click Balances in the left list in Figure 2. If no pledge has been made, you get a display like Figure 15 with no entries.

Abbot, Edgar (Constituent - 333333334)			
Balances			
Event	Fund	Pledges	Payments
Annual fund drive	Annual Alum	\$250.00	\$500.00
McCarthy Pool	Building Capital	\$2,500.00	\$0.00
Totals:		\$2,750.00	\$500.00
Outstanding:		(\$2,250.00)	

• Figure 15 Balances

This display simply shows the status. As you enter pledges (page 20) and payments (page 21), the information in this display changes.

Biographic

To SONISWEB® a person is a person is a person. He or she has one biographic record even if the person is a constituent and an “alum” and a faculty member. This is covered in “The Biographic Record” on page 31 and shown in Figure 46.

Constituent Information

This record is unique to constituents.

1. Click Constituent Information in the left list in Figure 2. You see Figure 16.

Abbot, Edgar (Constituent - 333333334)			
Constituent Information			
Income Level	<input type="text" value="125000"/>	Potential Pledge	<input type="text" value="3000"/>
Constituent Rating	<input type="text" value="High"/>	Giving Level	<input type="text" value="Annual 1000"/>
Constituent Type	<input type="text" value="Alum"/>	Assets	<input type="text" value="0"/>
Power of Attorney	<input checked="" type="checkbox"/>	Attorney	<input type="text" value="Sidney Carlton"/>
Executor	<input type="checkbox"/>	Attorney Phone	<input type="text" value="363-555-1212"/>
Memo	<input type="text" value="Alum and senior faculty"/>		
	<input type="button" value="Reset"/>		<input type="button" value="Submit"/>

• Figure 16 Constituent Information

2. Enter the information. With one exception, the pulldown⁵ lists in Figure 16 come from the tables of the same name you established in “Setting Up the Tables” on page 35.

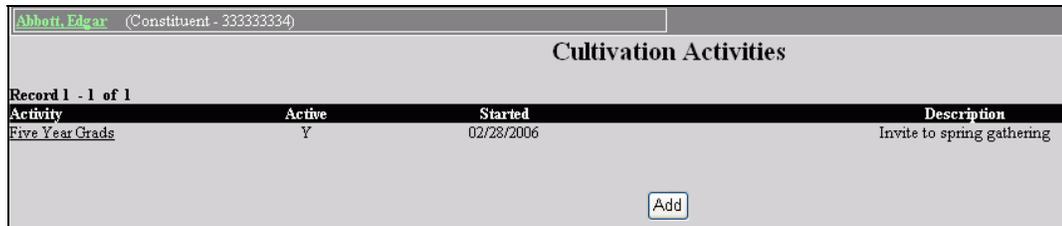
“Staff Fundraiser” is the exception. This list comes from the “Fundraising” records of persons with the status of staff (ST). In that record, staff persons with fund raising responsibilities have “Active” checked.

- Once you've filled in the information in Figure 16, click the Submit button to update the record.

Cultivation Activities

Cultivation activities aim to build a closer relationship between the constituent and your institution.

- Click Cultivation Activities in the left list in Figure 2. You see a display that is empty if you have established none or looks like Figure 17 if some have been entered.



Abbott, Edgar (Constituent - 333333334)

Cultivation Activities

Record 1 - 1 of 1

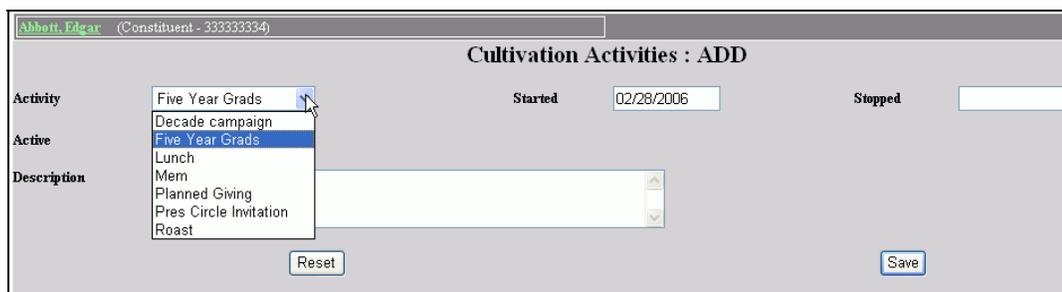
Activity	Active	Started	Description
<u>Five Year Grads</u>	Y	02/28/2006	Invite to spring gathering

Add

• Figure 17 Cultivation Activities

- For a new activity, click the Add button in Figure 17.

To change an existing activity, click the underlined name of that activity in Figure 17.



Abbott, Edgar (Constituent - 333333334)

Cultivation Activities : ADD

Activity: Started: Stopped:

Active:

Description:

Reset Save

• Figure 18 Cultivation Activity Detail

Figure 18 shows the activity detail. Of course, if you are adding an activity, it is mostly blank.

- Use the pulldown list⁵ to pick a cultivation activity from the list.
- The Active checkbox⁵ and the dates permit you to track this activity. It provides a useful summary when displayed in Figure 17.
- To erase what you have entered and start over, click the Reset button instead of the Submit button.
- To save your entries, click the Submit button.

Employment

There is one set of employment records for an individual no matter how many roles (statuses) she or he has at your school.

- Click Employment in the left list in Figure 2. You get Figure 19.

3. Click either the underlined name of an existing record or the Add button to get Figure 21.



• Figure 21 Interests and Organizations Record

If you don't find the interest or organization you need in the "Interest" pulldown in Figure 21, have your SONISWEB® administrator add it using [Table Maintenance](#).

Licenses and Certificates

1. Click [Licenses](#) in the left list in Figure 2.
2. You get a list of current records, if any, and an Add button.
3. Click either the underlined name of an existing record or the Add button to get Figure 22.



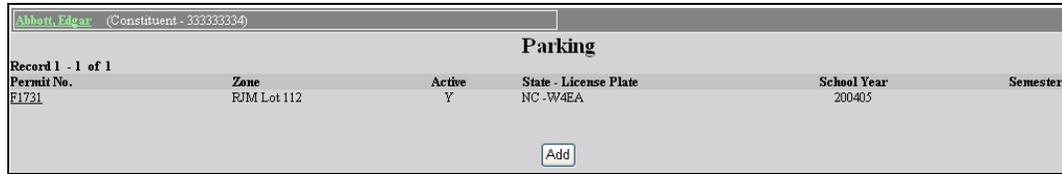
• Figure 22 License and Certificate Record

If you don't find the license or certificate you need in the "licenses" pulldown in Figure 21, have your SONISWEB® administrator add it using [Table Maintenance](#).

Parking Permits

Parking is especially important for volunteers, so you can issue permits. The text "Parking" covers this subject in more detail.

1. Click [Parking](#) in the left list in Figure 2.



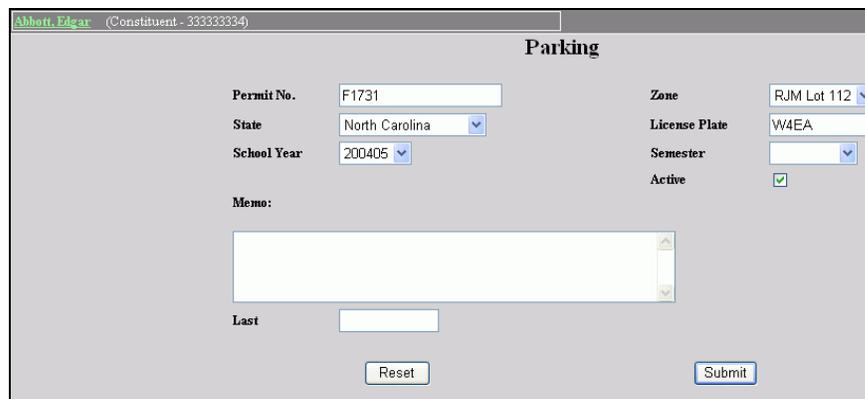
Abbott, Edgar (Constituent - 333333334)					
Parking					
Permit No.	Zone	Active	State - License Plate	School Year	Semester
<u>F1731</u>	RJM Lot 112	Y	NC -W4EA	200405	

• Figure 23 Parking Permit List

- You see a list of existing parking permits – both active and inactive – as illustrated in Figure 23. If this person has no permits, only the Add button appears.

A person can be assigned as many active permits as you wish. This is common where the permits are glued to the car and faculty members have two cars. It is also used for “pool” issued to visiting faculty or volunteers as needed.

- To add a permit, click the Add button. You get Figure 24.



Abbott, Edgar (Constituent - 333333334)

Parking

Permit No. Zone

State License Plate

School Year Semester

Active

Memo:

Last

• Figure 24 Parking Permits Data Record

- Enter the information in Figure 24, then click Submit.

To erase what you have entered, click the Reset button before clicking the Submit button.

Editing and Deleting Existing Parking Permits

When you get to the list of existing permits shown in Figure 23, click the underlined permit number that you want to change. You get a display similar to Figure 24.

To make a permit inactive, click the Active check box until it is empty, then click the Submit button.

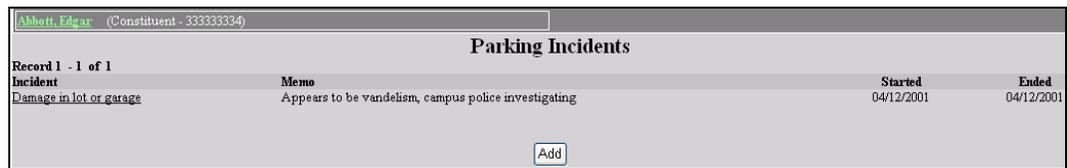
To change the data recorded, simply type in the changes or select other choices with the pull down⁵ arrows. When it is the way you want it, click the Submit button.

To delete a permit, click the Delete button. (It appears at the bottom of Figure 24 when you are editing.) You get a confirming prompt asking if you really mean it.

Parking Incidents

Parking incidents can be infractions by the person to whom you issued a permit (“Parking Permits” above) or something that happened to that person or her or his car.

1. Click Parking Incidents in the left list in Figure 2.



Abbott, Edgar (Constituent - 333333334)			
Parking Incidents			
Record 1 - 1 of 1			
Incident	Memo	Started	Ended
<u>Damage in lot or garage</u>	Appears to be vandalism, campus police investigating	04/12/2001	04/12/2001

• Figure 25 Parking Incident List

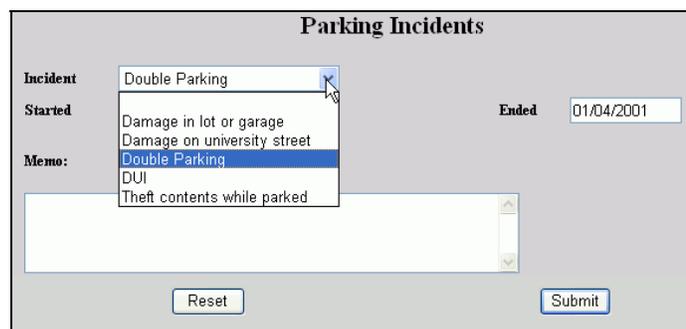
2. You see a list of existing parking incidents as illustrated in Figure 25. If this person has no incidents, only the Add button appears.

A person can have as many incidents recorded as you wish.

3. To add an incident, click the Add button. You get Figure 26.

4. Enter the information in Figure 26, then click Submit.

To erase what you have entered, click the Reset button before clicking the Submit button.



Parking Incidents

Incident: (dropdown menu open with options: Double Parking, Damage in lot or garage, Damage on university street, DUI, Theft contents while parked)

Started: (date field)

Ended: (date field)

Memo:

• Figure 26 Parking Incident Data Record

Editing or Deleting Existing Incidents

In Figure 25, click the underlined incident title that you want to change. You get a display similar to Figure 26.

To change the data recorded, simply type in the changes or select another choice with the pull down arrow. When it is the way you want it, click the Submit button.

To delete an incident, click the Delete button. (It appears at the bottom of Figure 26 when you are editing.) You get a confirming prompt asking if you really mean it.

Payment History

Abbott, Edgar (Constituent - 333333334)							
Payment History							
Event	Fund	Date	Description	Pledges	Payments	Check No.	Voided
Pool	Building Capital	01/09/2006	Constituent Pledge	\$2,500.00	\$0.00		
Annual fund drive	Annual Alum	01/09/2006	Constituent Pledge	\$250.00	\$0.00		
Annual fund drive	Annual Alum	12/15/2005	Constit Pledge Payment	\$0.00	\$250.00		
Annual fund drive	Annual Alum	12/31/2005	Employer Matching gift	\$0.00	\$250.00		
2007 Engineering Annex	Library upgrade	01/05/2006	Cash Gifts	\$0.00	\$1.00	123456789012	X
Dorm West	Library upgrade	01/05/2006	Cash Gifts	\$0.00	\$1.00	123456789012	X
Total Pledges: \$2,750.00				Total Payments: \$500.00			

• Figure 27 Payment History

This summarizes the person’s pledge and payment history. It shows all the pledges, payment, and voided items. To see Figure 27, click [Payment History](#) in the left list in Figure 2.

Pledge

You record pledges made by your constituents. Only someone with a role (status) as a constituent (CO) can have pledge records. See “Making Constituents of Alums, Faculty, and Students” (page 29) to add that status (role) to their record.

1. Click [Pledges](#) in the left list in Figure 2 to get list of existing pledges. You see only the Add button if there are no existing pledges.

Abbott, Edgar (Constituent - 333333334)			
Pledge			
Code	Constituent Pledge	Event	McCarthy Pool
Amount	0	Fund	Annual Alum
		Add Pledge	

• Figure 28 Pledge Record

2. For an existing pledge, you can change the Event and/or the amount but not the pledge in Figure 28.

When you click the Add button you get a blank version of Figure 28 to fill in.

3. Click the pulldown⁵ arrow for “Pledge” to pick the code for the type of pledge.

In the “Fund Raiser Codes Table” (page 46), codes are set up either as pledges or as payments. Only those defined as pledges can be selected here.

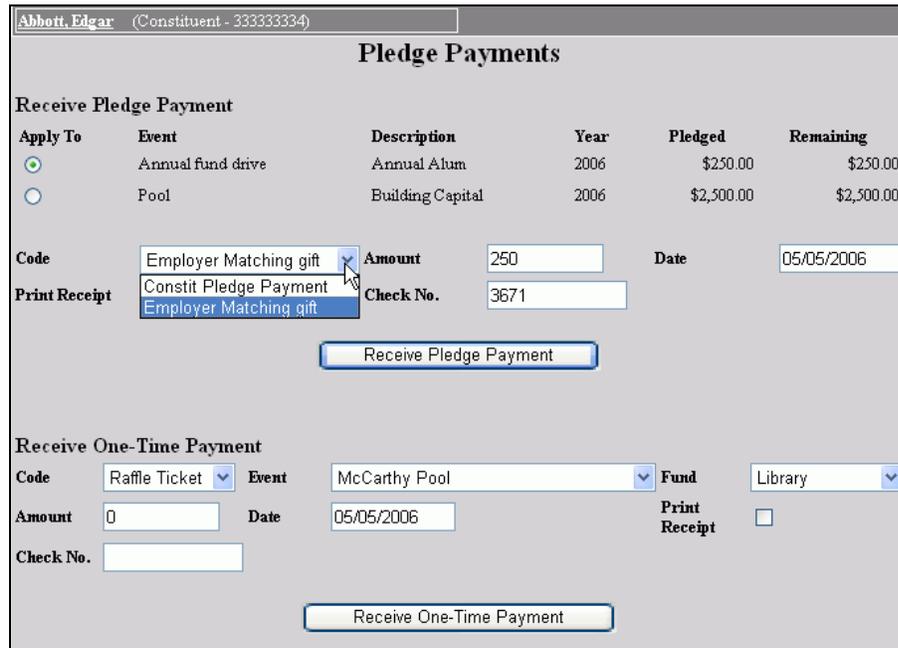
4. Click the “Event⁷” to pick the fund the person is pledging to.
5. Enter the amount pledged, then click Add Pledge.

⁷ See “Setting Up the Tables”, page 35.

Pledge Payments

You record both pledge payments and one-time payments not attached to a pledge. Use the top of Figure 29 to enter periodic payments against a pledge. Use the bottom of Figure 29 to enter a one-time payment.

1. Click Pledge Payments in the left list in Figure 2 to get Figure 29.



Abbott, Edgar (Constituent - 333333334)

Pledge Payments

Receive Pledge Payment

Apply To	Event	Description	Year	Pledged	Remaining
<input checked="" type="radio"/>	Annual fund drive	Annual Alum	2006	\$250.00	\$250.00
<input type="radio"/>	Pool	Building Capital	2006	\$2,500.00	\$2,500.00

Code: Amount: Date:
 Print Receipt: Check No.:

Receive One-Time Payment

Code: Event: Fund:
 Amount: Date: Print Receipt:
 Check No.:

• Figure 29 Pledge Payments

2. For pledges use the “Apply To” radio buttons⁵ in Figure 29 to select which pledge this applies to and the pulldown⁵ for “Code” to pick the payee. For one-time payments use the pulldowns⁵ for “Code”, “Event” and “Fund” that this payment applies to. Optionally you can click the checkbox for “Print Receipt” for both pledge and one-time payments.

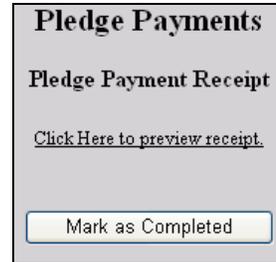
The pledge entries in Figure 29 are displayed with the Code, Event, and Fund entries in no particular order. If you are entering the a pledge payment (top), you can ignore the one-time payment information. SONISWEB® records only the information related to the “Receive” button you click.

3. Enter the amount received in payment, and then click the appropriate “Receive” button.

4. Without a checkmark in “Print Receipt”, you get Figure 15. With a checkmark in “Print Receipt”, you get Figure 30.
5. In Figure 30 [Click Here to preview receipt](#) displays the receipt that you can print.
6. Click “Mark as Complete” and you see Figure 15.

These payments appear on the balances (Figure 15) and history (Figure 27) displays.

For one-time payments (bottom of Figure 29), the “Code” choices in are restricted to payments not requiring a pledge. You set them up in the “Fund Raiser Codes Table” on page 46.



• Figure 30 Pledge Payment Receipt

Relationships

This is a record of the relationships a person has either to another person in your SONISWEB® database, the name of an emergency contact, or both.

Click [Relationships](#) in the left list in Figure 2 for a list for this person as illustrated in Figure 31.

Relationships					
Last	First	Relation	Work Phone	Telephone	Electronic Mail
Jones	Amanda	spouse	919-555-1210	919-555-1212	profjones@RJM.U.edu

• Figure 31 Relationships

Figure 31 will have nothing but the Add button if no relationship records exist for this person.

Click the Add button and you get a display like that in Figure 6 on page 9. With it, you search for an existing person in your database with whom there is a relationship. Enter as much as you know of the related person’s name and ID. If no person is found with this search, you get a display with the only the “No records match...” button shown in Figure 32. In that case, click the button to get a blank version of Figure 34.



• Figure 32 No Relationship Record Found

Relationships			
Name	PID	Status	Gender
<input checked="" type="radio"/> Jones, Amanda	JO1163232	Faculty	Female

• Figure 33 Relationships Name Found

If a match is found, you see a list of one or more names like that in Figure 33. Click the radio button⁵ of the person you want then click the Select button to get Figure 34.

If none of the persons in Figure 33 is the person needed, click the “Not Found-Add” button to get a [blank](#) version of Figure 34.

Abbot, Edgar (Constituent - 333333334)

Relationships - ADD

Last	<input type="text" value="Jones"/>	First	<input type="text" value="Amanda"/>	MI	<input type="text" value="B"/>
Relation	<input type="text" value=""/>	PID	<input type="text" value="JO1163232"/>	Street Cont.	<input type="text" value=""/>
Street Address	<input type="text" value=""/>	Street Address	<input type="text" value=""/>	Zipcode	<input type="text" value="28111"/>
City	<input type="text" value=""/>	State	<input type="text" value="North Carolina"/>	Country	<input type="text" value="U.S.A."/>
County Code	<input type="text" value=""/>	Fax	<input type="text" value=""/>	Work Phone	<input type="text" value="919-555-1210"/>
Telephone	<input type="text" value=""/>				
Electronic Mail	<input type="text" value=""/>				
Memo	<input type="text" value=""/>				

• Figure 34 Relationships Detail Record

When you click the Select button in Figure 33, you see Figure 34. It is filled with all of the information about that person in your database. Fill in any missing information.

When you click the “No records match...” button shown in Figure 32 or the “Not Found-Add” button in Figure 33, you get a blank version of Figure 34. You must fill in all the information since there is no SONISWEB® record for this person.

To erase what you entered and start over, click the Reset button in Figure 34.

Use the pulldown⁵ arrow to get the list of standard relationships⁸ as illustrated in Figure 76 (page 53). Click the relationship that applies then click the Submit button shown at the bottom of Figure 34.

To delete a relationship, click the Delete button shown at the bottom of Figure 34.

To change the information in a relationship, click the underlined name of the related person in Figure 31. You get Figure 34 where you can change the data then Submit it to change it.

⁸ These standard relationships are set up by your SONISWEB® administrator using the “Relation Join” systems function shown on page 53.

User Security

Sometimes constituents serve as volunteers where they need limited access to your SONISWEB® data. You can set up a group profile for these volunteers and assign them User-IDs and passwords to access the system.

1. Click Void Pledges/Payments in the left list in Figure 2. You get Figure 35.



The screenshot shows a web interface for creating a user. At the top, it identifies the user as 'Cali, Nancy (Constituent - CO6303485)'. Below this is a section titled 'User Security'. It includes a text input field for 'Create A User_ID:' containing 'YColt', a password field with masked characters, a dropdown menu for 'Profile:' currently showing 'Recruiting Volunteer', and two buttons: 'RESET' and 'CREATE'.

• Figure 35 User Security

2. Enter the User-ID and password for this person.
3. From the “Profile” pulldown, pick the one that gives the level of security needed then click the CREATE button.
4. Tell the volunteer his or her User-ID and password.

If there is no profile that provides the limited access needed, see your SONISWEB® administrator to have one established.

Void Pledges/Payments

You can void pledges that have “aged” without payment. You can void a payment entered incorrectly.

1. Click Void Pledges/Payments in the left list in Figure 2. You get Figure 36.

Abbott, Edgar (Constituent - 333333334)						
Void Pledge/Payments						
Select	Event	Date	Description	Pledges	Payments	Check No.
<input checked="" type="radio"/>	Pool	01/09/2006	Constituent Pledge	\$2,500.00	\$0.00	
<input type="radio"/>	Annual fund drive	01/09/2006	Constituent Pledge	\$250.00	\$0.00	
<input type="radio"/>	Annual fund drive	12/15/2005	Constit Pledge Payment	\$0.00	\$250.00	
<input type="radio"/>	Annual fund drive	12/31/2005	Employer Matching gift	\$0.00	\$250.00	
Voided	2007 Engineering Annex	01/05/2006	Cash Gifts	\$0.00	\$1.00	123456789012
Voided	Dorm West	01/05/2006	Cash Gifts	\$0.00	\$1.00	123456789012
Total Pledges: \$2,750.00				Total Payments: \$500.00		
<input type="button" value="Void Transaction"/>						

• Figure 36 Void Pledges/Payments

2. In Figure 36 pick the item you want to void, then click the Void button.

If you do not to void, click Void Pledges/Payments in the left list in Figure 2 before clicking the Void button in Figure 36. That stops the void process.

As Figure 27 shows, voided items are not deleted, they are simply marked in the history of the pledge and payments. This is to meet financial record keeping standards.

Volunteer

Gifts of time are recorded with volunteer records.

1. Click Volunteer in the left list in Figure 2.

Abbott, Edgar (Constituent - 333333334)			
Volunteer			
Record 1 - 1 of 1			
Event	Active	Start Date	Stop Date
<u>Annual fund drive</u>	Y	09/01/2005	05/15/2006
<input type="button" value="Add"/>			

• Figure 37 Volunteer List

If there are no current volunteer records, Figure 37 has only the Add button.

2. To add a new event for this volunteer, click the Add button.

To edit an existing volunteer record, click the underlined Event in Figure 37.

3. Use the Event⁷ pulldown⁵ in Figure 38 to select the event, then fill in the information.

The screenshot shows a web form titled "Volunteer" for constituent "Abbott, Edgar (Constituent - 333333334)". The form has three main sections: "Event", "Active", and "Stopped".

- Event:** A dropdown menu is open, showing a list of events: "Annual fund drive", "Engineering school east annex 2007-8", "Annual fund drive", "Coed dorm main west", "Annual fall homecoming conclave", "Smithers Library Building", and "McCarthy Pool". The first "Annual fund drive" option is selected.
- Active:** A checkbox is checked.
- Stopped:** A date field contains "05/15/2006".

At the bottom of the form, there are two buttons: "Save" and "Delete". A "Reset" button is also visible near the event dropdown.

• Figure 38 Volunteer Record

The Active, Started, and Stopped entries let you keep a record of this constituent's volunteering history. That history appears in Figure 37.

4. Click the Reset button to clear what you have entered so you can start over again.
5. Click the Submit button and this volunteer record is added to the constituent's records.

ENTERING NEW CONSTITUENTS AND EDITING THEIR RECORDS

New Constituents

If your new constituent is already in the SONISWEB® database as an alum, a student, or a faculty member, do not follow these steps. Instead use “Making Constituents of Alums, Faculty, and Students” on page 30.

Duplicate people-records in your SONISWEB® databases keep you from seeing that your volunteers and givers are also your “alums” and faculty. To prevent duplicate records, search for the person by last name in Figure 6 without any other selections for Status, Division, etc. Only when you are sure you have no record of her or him, add the person.

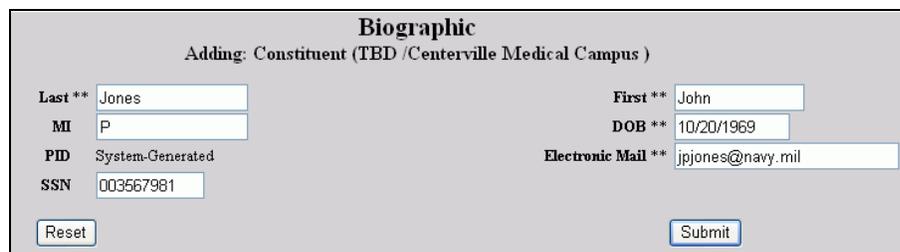
1. To enter records for a new person, click **Names** as described in “Entering Payments, Pledges, and Volunteer Commitments” on page 9.



• Figure 39 New Constituent

For a new person, you enter an entirely new record, so ignore the top of the display (Figure 6).

2. In Figure 39 Click Constituent under Record Status.
3. Click the one most appropriate entry for Division⁹, Campus⁹, Department⁹, and Level⁹.
4. Click the “Add Name/Record Status” button. You get Figure 40.

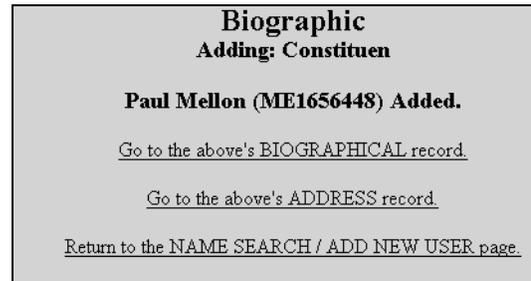


• Figure 40 New Constituent Identifying Information

You can choose only one item in each criterion in Figure 39.

⁹ Your choices are used in mailings, see “Mail-Merge, E-Mail Merge, Mailing Labels, Timed Letters, and Timed E-mail” on page 56.

5. Enter the identifying information on this new constituent. You must enter the information in the fields with a double asterisk (**) beside them.
SONISWEB® computes a pseudo-random ID that is unique to your database records as illustrated in Figure 41.
6. Click Reset to erase what you have entered to start over.
7. Click the Submit button to record the information. That yields Figure 41.
8. For a new constituent, you typically click the underlined option for BIOGRAPHICAL records and enter that information as described in “The Biographic Record” on page 31.



• Figure 41 New Constituent Confirmation

Making Constituents of Alums, Faculty, and Students

A person can have many roles (statuses) in your institution. If a person currently in your records decides to become a constituent, it is a simple matter to add that role.

A person must be a constituent to pledge.

• Figure 42 Adding Constituent Status to Existing Person

Unless your institution disabled it as part of configuration, the graduation process automatically adds the Constituent status to a person’s record at graduation, so you do not have to do that here. See the text “Graduation and Promotion” for more information.

You treat this additional status (role) as if you were adding a new person.

1. Follow the steps in “Entering New Constituents and Editing Their Records” above except you must enter the person’s existing PID (ID number) as shown in Figure 42. That is needed for SONISWEB® to see this as an added status, not a new person with the same name.
2. Click the “Add Name/Record Status” button in Figure 42; you get a display like Figure 43.

• Figure 43 Step 2 Adding Constituent Status

3. As you see in Figure 44, SONISWEB® retrieved the name confirming that this is not a new person. If this is the correct person, click the Submit button. If not, click Names in Figure 1 again and find the person you want.

Biographic
Adding: Constituent

Last Payne		First Thomas
MI		PID PA9005967
DOB 10/01/1983		Electronic Mail death@liberty.org

NEW STATUS CAN BE ADDED, OR CURRENT REPLACED:
Payne, Thomas (Alumni - PA9005967)

Payne, Thomas (PA9005967) already exists but NOT as a Constituent.
Note: The name you entered was Payne, Thomas.

• Figure 44 Step 3 Constituency Status

4. Figure 44 is what you get when you click the Submit button in Figure 44. This is your final chance to make sure this is the right person. If it is not, click the Quit button. If it is correct, click the person's underlined name. You get Figure 45.

Biographic
Adding: Constituent

Last Payne		First Thomas
MI		PID PA9005967
DOB 10/01/1983		Electronic Mail death@liberty.org

Thomas Payne (PA9005967)

[Add CONSTITUENT to this user's record.](#)

[Change ALUMNI to CONSTITUENT](#)

• Figure 45 Final Step to Add Constituency Status

5. Normally you want to add this new status (role) and not replace an existing status, so click the underlined Add CONSTITUENT... phase in Figure 45.
6. Now you add pledges (“Entering Payments, Pledges, and Volunteer Commitments” on page 9), update records, etc.

Editing Constituent Records

The Biographic Record

Each person in the SONISWEB® database has a biographic record. A person has only one record even if she or he is a student, an alumnus-alumna, a faculty member, and a pledging constituent all at the same time.

Abbott, Edgar (Constituent - 333333334)

Biographic

Last	Abbott	First	Edgar	MI	M
Nickname		Prefix	Dr.	Suffix	
Maiden		Gender	Male	Status	CO
PID	333333334	PIN	Unauthorized	SSN	Unauthorized
DOB	Unauthorized	Deceased	<input type="checkbox"/>	Expired	
Exam ID	Unauthorized	Affiliation		Citizen	<input type="checkbox"/>
Ethnic Code	American Indian	Marital Code	Married	Served In Military	<input checked="" type="checkbox"/>
IPED Status		Academic Status	To Be Determined	Photo Filename	abbott.jpg
	Email		Display Photo	Fund. Stat.	
Level	Not Applicable	Tuition Status		Campus	Centerville Main Campus
Dept.	Liberal Arts	Division	Daytime	Date Released	
Online Reg. Hold	<input type="checkbox"/>	Release	<input type="checkbox"/>	Exclude from Bulk Transactions	<input type="checkbox"/>
Exclude from Billing	<input type="checkbox"/>	Exclude from Mailing	<input type="checkbox"/>		
NSLCH Block	<input type="checkbox"/>	Incl. in Directory	<input checked="" type="checkbox"/>		

Citizenship Information

Hide Name Publishing Options

Include: Address Phone Work Phone Email Address

Remarks

Transcript Memo

Disabled N

Reset Submit DELETE

• Figure 46 Biographic Record

This large display permits you to enter and to change the information about this person. The person’s “Status” is determined when you enter him or her (page 28) or enter an additional status (page 29). The status (role) you choose in Figure 8 is the one shown in Figure 46 even if he or she has more than one status.

Since constituents often expect you to protect their information, you should select the appropriate Publishing Options near the bottom of Figure 46. This limits what your Web users see when they do a search.

1. Enter or change the information in Figure 46, then click the Submit button.
2. To delete the record, click the Delete button.

ADDING ACTIVITIES FOR A GROUP

This is for assigning one or more activities to a group of people rather than assigning them individually.

1. Log on to SONISWEB® (page 64). Your security profile must be set to allow it.
2. Select **Systems** from the top list (Figure 1). You get Figure 2.
3. From the list in Figure 2, click Activities: Add by Group. That yields Figure 47.

• Figure 47 Activities by Group

4. In Figure 47 define the group by selecting¹⁰ those criteria that define the group.
5. To erase your selections and start over click the Reset button.
6. When you have selected the criteria, click the Submit button. You get Figure 50.

In selecting criteria, do this:

If a selection does not pertain to the group, select a blank entry. For example, if the group is not defined by a campus, select a “blank” campus as shown in Figure 48.

• Figure 48 "Blank" Selection

To pick all of the choices¹⁰, click the top item, hold down the **Shift** key on your keyboard, scroll to the last selection, click it, then release the shift key. It will look like Figure 49.

• Figure 49 All Choices Selected

To pick more than one choice¹⁰ from a list, click the first item, hold down the **Ctrl** key on your keyboard, scroll to the next item you want, click it, continue holding the **Ctrl**, scroll to the next item, click it, etc. until you have selected the last item. When you release the **Ctrl** key, all your choices will have been selected.

¹⁰ For guidance in making multiple choices from a menu, see Figure 104 and the description on page 65.

- In Figure 50 look first at the top. It confirms for you what you selected in Figure 47.

If what you see at the top of Figure 50 is not what you intended, go to Figure 2 again and click Activities: Add by Group to start over.

- Choose one or more activities to be assigned to the group using the multiple choice technique¹⁰.
- To erase your selections and start over, click the Reset button.
- With your selections made, click the Submit button to have the activities assigned to the group you selected.

GROUPED BY:
Status: Student
Div.: Daytime, Evening
Dept.: Liberal Arts, Nursing & Allied Health, Science & Technology
Class: Senior
Term of Interest: all
Campus: all
Program Code: all

Matches: 8.

Select Activity(s)

- Acceptance Letter
- Applicant Packet2
- Callback
- Campus Visit
- Catalog
- E-mail
- Financial Aid Info
- Int. Student
- Letter
- Letter 1 Prospects
- Letter 2
- Letter 3
- Mail Merge
- Off-site Visit
- Other
- Other Activity
- Placement Quest
- SAT
- Send Application
- Send Brochure
- Send Catalog
- STCC Call
- Viewbook

• Figure 50 Activity Selections for the Group

SETTING UP THE TABLES

These tables are used by development and fund raising:

- Activities, found in the Systems function list shown in Figure 2 on page 4.
- Constituent Rating, found in the Systems function list shown in Figure 2.
- Constituent Type, accessed using Table Maintenance, see page 5.
- Cultivation Activities, accessed using Table Maintenance, see page 5.
- Events, accessed using Table Maintenance, see page 5.
- Fund Raiser Codes, accessed using Table Maintenance, see page 5.
- Funds, found in the Systems function list shown in Figure 2.
- Giving Level, found in the Systems function list shown in Figure 2.
- Pledge Activities, accessed using Table Maintenance, see page 5.
- Pledge by Event, found in the Systems function list shown in Figure 2.
- Pledge TCodes Mappings, found in the Systems function list shown in Figure 2.
- Relation Join, found in the Systems function list shown in Figure 2.

Your security profile must be set to give you permission to use Table Maintenance. If you do not see **Systems** on the top of your display or Table Maintenance does not appear in the function list on the left of your display, contact your SONISWEB® administrator to resolve your permissions.

Caution: do not use any punctuation in your table entries. Characters like ‘, “, ”, ,, :, and - confuse the software. You get an error message. The ’ in President’s Reception is an example of what you should not use. Presidents Reception will work correctly.

Activities Table

The Activities table contains activities for constituents, prospective students, applicants, nearly anyone in the SONISWEB® databases. It is a broadly shared table. In changing the table, take care not to change or delete a table entry used by another staff person for applicants, recruiting activities, etc.

Activities are defined in a table that is accessed through Activities under Systems. Your security profile must give you permission to use Activities in order to access the tables.

1. Log on to SONISWEB® (page 64).
2. Select **Systems** from the top list Figure 1. You get Figure 2.
3. From the list in Figure 2, click Activities. That yields Figure 51.

Activities				
Record 21 - 30 of 33				
Activity Code	Activity	Type	Request	Disabled
<u>PEM</u>	Pledge E-Mail	Email	N	N
<u>PLT</u>	Pledge Letter	Letter	N	N
<u>SA1</u>	Send Application		N	N
<u>SAL</u>	Letter with Sabutation	Letter	N	N
<u>SAR</u>	StudentAlumniRequest	Letter	Y	N
<u>SE1</u>	Send Brochure		N	N
<u>SC1</u>	Send Catalog		N	N
<u>SCL</u>	STCC Call		N	N

• Figure 51 Activities Table

In Figure 51 you see an alphabetical list in Activity Code order.

Record 21 - 30 of 33 shows you how many Activity records there are and which you are viewing in this display.

Activity Code
PEM is the code defined when the activity was initially entered.

Activity
Pledge E-Mail is the description for the activity.

Type
Email
Letter tells you whether or not it is a timed letter or e-mail note and what status¹¹ of persons it is for.

Request
N if “Y” means this activity can be requested via a student, alumni/ae, etc. from their online access to SONISWEB®.

Disabled
N specifies whether (“Y”) or not (“N”) this activity is still active and usable.

are buttons that let you move through the list of activities.

to add a new activity.

to add an activity that can be directly requested by a student, alumni/ae, etc. from their online access to SONISWEB®.

- To add a new activity, click the “Add” or “Add Request” button. To edit an existing activity, click the underlined Activity Code (SA1) for that entry. In either case, you get a display like Figure 52, although it is blank for a new entry.

¹¹ Status is the role a person has in your institution. Examples are PS for Prospective Student, AL for Alumni/ae, ST for Student, etc.

Activities

Activity Code	PEM	Activity	Pledge E-Mail	Disabled <input type="checkbox"/>
Letter	<input type="radio"/>	E-Mail	<input checked="" type="radio"/>	Neither <input type="radio"/>
		Status	<div style="border: 1px solid gray; padding: 2px;"> Alumni Applicant Constituent Faculty Online App Prospect Staff </div>	
Delta Days	<input type="text" value="0"/>			Stop On App. <input type="checkbox"/>
	Incl Checklist <input type="checkbox"/>			
Sender E-Mail	<input type="text" value="CherylK@rjmu.edu"/>			
E-Mail Salutation	<input type="text" value="Dear #first_name#,

"/>			
Memo	<small>E-Mails require HTML to format properly.</small>			
	<input style="width: 100%;" type="text" value="Thank you for your pledge payment. Your continued support makes RJM University better and better."/>			
E-mail Attachment	<input type="text"/>			
<input type="button" value="Reset"/>		<input type="button" value="Submit"/>		
<input type="button" value="Delete"/>				

• Figure 52 Activity Record

- Enter or change the data in the table.

Activity Code is the abbreviation you want to use for this activity. When adding a new activity, you enter the code in a field. When editing an activity, you cannot change the code.

Activity is a description that should be clear, unique and related to the Activity Code so users know what it is and where it is used.

Disabled checkbox¹²; to disable this activity so it can no longer be selected, click the box until a checkmark appears. To enable the activity selected, click the box until it is empty.

Letter radio button¹²; a filled circle means this activity is a timed letter and will appear as a choice when selecting timed letters. Click the radio button until it is filled if this is a timed letter activity.

E-Mail radio button¹²; a filled circle means this activity is a timed e-mail note and will appear as a choice when selecting timed e-mail. Click the radio button until it is filled if this is a timed e-mail activity.

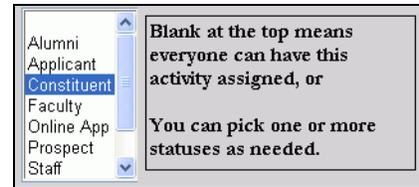
¹² See page Figure 103 for guidance.

Neither radio button¹²; a filled circle means it's neither a timed letter nor an e-mail note.

Delta Days is a trigger that makes a person eligible for a timed letter. See "Timing and 'Delta Days' Explained" on page 39.

Status usage is shown in Figure 53.

Stop on App. is for applicants. It means that when an application is recorded in a prospective student's Inquiry Details Record, this letter will not be mailed to him or her. The activity is marked as "stopped" and will not appear on the timed letter report.



• Figure 53 Status and Activities

When a person is admitted as a student – whether an application has been recorded or not – all activities marked as "Stop on App." are treated as though an application has been received.

Incl[ude] Checklist is also unique to Applicants. It means the applicant checklist items not completed are to be listed at the end of the letter or e-mail note. See the text "Applicant Checklists, Activities, and Disposition" for more information.

Sender E-Mail is an option if the E-Mail radio button is filled. It is what will appear on the "From" and/or "Reply to" headers in the e-mail note. For example, if several people will be sending this e-mail note but you want all replies to come to one specific address, put that address in "Sender E-Mail".

E-Mail Salutation lets you personalize the note. See "Salutation Choices" on page 39 for the choices.

Memo:

If the Letter or the E-Mail radio button is filled, this is the body of the letter or the e-mail note.

If the Letter or the E-Mail radio button is blank, it is only a comment to further describe this activity.

E-mail Attachment is an option if the E-Mail radio button is filled. You enter the file name of something you want to attach to the note. It can be anything that your e-mail software permits. In Figure 54 it's a picture of the class rings available to seniors. Send any files you want to attach to the SONISWEB® administrator to be placed in the SONISWEB® Batch folder¹³ so you can attach them.



• Figure 54 E-Mail Attachment Example

¹³ Using Web Options, your SONISWEB® administrator can change the directory-folder used for these attachments.

6. Click the Reset button to clear what you entered and start over.
7. Click the Submit button to store what you entered. That yields Figure 51.
8. You can temporarily disable an activity so it cannot be selected as described in **Disabled** above. If you wish to permanently delete this entry, click the Delete button. You get a confirming display asking if you really mean it.

Timing and ‘Delta Days’ Explained

A “Delta Days” of 0 means “right now”, a “Delta Days” of 30 means thirty days after the Activity was placed in the person’s record. Examples:

- You fill in the Inquiry Detail Record for a prospect. Typically your recruiting plan¹⁴ specifies that three e-mail notes or letters are to be sent, so you set up three activities.
 - The first** e-mail note is sent the next time you run Timed E-Mail. In Figure 52, E-Mail is checked, Stop on App. is checked, and Delta Days = 0. (If an application is recorded before this first e-mail note is sent it will not, of course, be sent.)
 - The second** is sent in 30 days if an application has not been received. In Figure 52, you check E-Mail, Stop on App., and set Delta Days to 30. It is sent anytime you run Timed E-Mail after 30 days has passed if an application has not been received.
 - A third** is sent in 60 days if an application has not been received. In Figure 52, you check E-Mail, Stop on App., and set Delta Days to 60. It is sent anytime you run Timed E-Mail after 60 days has passed if an application has not been received.
- You add an activity to the records of every Constituent who has expressed interest in work on the new library. Letter is checked. Stop on App. and Delta Days are ignored. The letter is sent the next time you run Timed Letters.

Salutation Choices

You use special codes to retrieve the salutation information from each person’s Biographic record. Here they are:

- First Name: you enter #first_name#
- Last Name: you enter #last_name#
- Middle Initial: you enter #mi#
- Prefix such as Mr., Ms., Prof: you enter #prefix#
- Suffix such as Jr., III: you enter #suffix#
- Maiden Name: you enter #maiden#

You can put punctuation within the salutation. If you know ColdFusion™ logic, you can add logic operators to control what is included.

¹⁴ See the text “Recruiting Prospective Students”.

SONISWEB® does not send letters or e-mails on its own. You invoke the timed function as described in “Mail-Merge, E-Mail Merge, Mailing Labels, Timed Letters, and Timed E-mail” (page 61). Everyone’s record is then examined for the “letter” or “e-mail” activity you selected. If the criteria described above are met, a letter or note for that person is displayed for printing or sending.

Constituent Rating

Every school has its preferred rating system. This simple table lets you set those ratings and use them in “Constituent Information” on page 14.

Constituent Rating		
Record 1 - 4 of 4		
Constituent Rating	Disabled	
<u>High</u>	N	
<u>Low</u>	N	
<u>Medium</u>	N	
<u>No Data</u>	N	
<input type="button" value="Add"/>		

• Figure 55 Constituent Rating Table

1. Select **Systems** from the top list Figure 1. You get Figure 2.
2. From the list in Figure 2, click **Constituent Rating**. That yields Figure 55.
3. To add a new rating, click the “Add” button.
4. To change an exiting rating, click its underlined name, make the changes, and click Submit.

Constituent Type

You specify the types of constituents based on your development activities and fund raising campaigns. It is used in “Constituent Information” on page 14.

1. Select **Systems** from the top list Figure 1. Then click Table Maintenance in Figure 2.
2. Click Constituent Type in Figure 3. You see Figure 56.

Table Maintenance - <i>constit_type</i>		
ADD New Record		
OR Edit Record (click on Button in the row): Sort Order		
<u>Constituent Type</u>	<u>Constituent Type</u>	<u>Disabled</u>
(constit_type_cod)	(constit_type_txt)	(disabled)
A1	Annual Level 1	0
A2	Annual Level 2	0
Bf	Building funds	0
IE	Individual Endowments	0
NE	Supports Named Endowments	0
Pf	Periodic one-time gifts	0
TB	To Be Determined	0

• Figure 56 Constituent Type Table

3. Figure 56 is a list of existing entries.
4. To add a new entry, click the “ADD New Record” button. That yields Figure 57.
5. To change an existing entry, click its button in the left column. That yields Figure 58.

Table Maintenance		
ADDING a new record to table: <i>constit_type</i> . Note: No column can be left blank.		
<u>Constituent Type</u>	<u>Constituent Type</u>	<u>Disabled</u>
(constit_type_cod)	(constit_type_txt)	(disabled)
NE	Supports Named Endowments	0
<input type="button" value="Reset"/>		<input type="button" value="Submit"/>

• Figure 57 New Constituent Type Entry

Table Maintenance - <i>constit_type/constit_type_cod</i>		
<u>Constituent Type</u>	<u>Constituent Type</u>	<u>Disabled</u>
(constit_type_cod)	(constit_type_txt)	(disabled)
Bf	Building funds	0
<input type="button" value="Reset"/>	<input type="button" value="Submit"/>	
<input type="button" value="Delete This Record"/>		

• Figure 58 Editing a Constituent Type Entry

6. For an added entry, you enter an abbreviation code for the type as shown in Figure 57.

- For an existing entry like Figure 58 you can change the description, disable it, or delete it, but you cannot change the abbreviation code.

You disable an entry by placing a 1 (the digit one) in the “Disabled” field. It’s like deleting it since no one can select it, but you can later enable it if you wish by placing a 0 (the digit zero) in the field.

When you use the “Delete This Record” button, the entry is removed if it has not been used. An entry that has been used cannot be deleted since that would invalidate existing records. In that case, you can only disable it.

- Use the Reset button to erase your changes so you can start over.
- Use the Submit button to add or update the entry.

Cultivation Activities Table

These are unique to development and fund raising. Unlike the “Activities Table” above, these are dated activities. They usually define a goal with start and end dates.

- Select **Systems** from the top list Figure 1. Then click Table Maintenance in Figure 2.
- Click Constituent Activities in Figure 3. You see Figure 59.

Table Maintenance - <i>culactivities</i>			
ADD New Record		OR Edit Record (click on Button in the row): Sort Order	
Cult. Row ID	Disable	Long Descr.	Short Desc.
(ca_rid)	(ca_disable)	(ca_ldesc)	(ca_sdesc)
8	0	Invite greater giving 10-year graduates	Decade campaign
10	0	Five year graduates reintroduction to regular contributions	Five Year Grads
1	0	Lunch	Lunch
5	0	Memorial	Mem
11	0	Planned giving selective campaign	Planned Giving
9	0	Presidents circle invitation to greater giving	Pres Circle Invitation
7	0	Letterman Roast	Roast

• Figure 59 Cultivation Activities Table

The table is in alphabetical order by “Short Desc.”

- To add a new Cultivation Activity, click the Add button in Figure 59.

To edit or delete an Cultivation Activity, click the Code number “button”. You get Figure 60.

Table Maintenance - <i>culactivities/ca_rid</i>			
Cult. Row ID	Disable	Long Descr.	Short Desc.
(ca_rid)	(ca_disable)	(ca_ldesc)	(ca_sdesc)
8	<input type="text" value="0"/>	Invite greater giving 10-year graduates	Decade campaign
<input type="button" value="Reset"/> <input type="button" value="Submit"/>		<input type="button" value="Delete This Record"/>	

• Figure 60 Cultivation Activity Table

This table allows you to enter long text descriptions, so it is uncommonly wide. It's been truncated in Figure 60.

4. Enter or change the data in the table, then click the Submit button.

Cult. Code is a number automatically generated by SONISWEB®. You cannot change it.

Disabled; You disable an entry by placing a 1 (the digit one) in the “Disabled” field. It's like deleting it since no one can select it, but you can later enable it if you wish by placing a 0 (the digit zero) in the field.

Long Description is the activity described as a sentence.

Short Description is a few words that capture the activity. This is what appears in the pulldown⁵ selection in “Cultivation Activities” (page 15).

5. Use the Reset button to erase your changes so you can start over.
6. Use the Submit button to add or update the entry.

To delete an entry, click the Delete. You get a confirming display asking if you really mean it.

When you use the “Delete This Record” button, the entry is removed if it has not been used. An entry that has been used cannot be deleted since that would invalidate existing records. In that case, you can only disable it.

Events Table

This table is used only in development and fund raising. An Event is the campaign a person pledges to (page 20), makes gifts to (page 21), or volunteers for (page 26). They are events like a fund-raising golf tournament. They are usually fund drives such as the “Annual Fund”. They are tasks constituents volunteer for like making calls during the “Annual fund drive”.

1. Select **Systems** from the top list Figure 1. Then click **Table Maintenance** in Figure 2
2. Click **Events** in Figure 3. You see Figure 61.

Table Maintenance - events							
ADD New Record		OR Edit Record (click on Button in the row): Sort Order					
Events Row ID	Short Description	Disabled	Long Description	Restricted	Start Date	Stop Date	Target Amt
(ev_rid)	(ev_sdesc)	(ev_disable)	(ev_ldesc)	(restricted)	(ev_st_date)	(ev_sp_date)	(ev_target)
4	2007 Engineering Annex	0	Engineering school east annex 2007-8	0	02/02/2002	05/15/2006	1,200,000.00
5	Annual fund drive	0	Annual fund drive	0	06/01/1990		1,250,000.00
2	Dorm West	0	Coed dorm main west	0	06/01/2004	06/01/2005	950,000.00
6	Homecoming	0	Annual fall homecoming conclave	0	08/01/1990		500,000.00
1	Library	0	Smithers Library Building	0	01/01/2001	06/01/2005	850,000.00
3	Pool	0	McCarthy Pool	0	01/03/2002	01/03/2003	350,000.00

• Figure 61 Events Table

The table is in alphabetical order by “Short Desc.”

3. To add a new Event, click the Add button in Figure 59.

To edit or delete an Event, click the Code number “button”. You get Figure 62.

Table Maintenance - events/ev_rid							
Events Row ID	Short Description	Disabled	Long Description	Restricted	Start Date	Stop Date	Target Amt
(ev_rid)	(ev_sdesc)	(ev_disable)	(ev_ldesc)	(restricted)	(ev_st_date)	(ev_sp_date)	(ev_target)
4	2007 Engineering Annex	0	Engineering school east annex 2007-8	0	02/02/2002	05/15/2006	1200000.00

Reset Submit

Delete This Record

• Figure 62 Events Table Entry

This table allows you to enter long text descriptions, so it is uncommonly wide. It has been graphically narrowed to fit in Figure 62.

4. Enter or change the data in the table, then click the Submit button.

Events Code is a number automatically generated by SONISWEB®. You cannot change it.

Short Description is a few words that capture the event. This is what appears in the pulldown⁵ selection in the displays.

Disabled should be zero (0) unless you want to disable this event so it can no longer be selected. A one (1) means it is disabled and cannot be selected with pulldowns⁵.

Long Description is the Event described as a sentence.

Start Date is when this Event is scheduled to begin.

Stop Date is when this Event is scheduled to end.

Target Amt is the funding sought for this event.

5. To delete an entry, click the Delete button in Figure 62. You get a confirming display asking if you really mean it.

Fund Raiser Codes Table

These codes are both financial transactions and they're selections used in "Pledge" (page 20) and "Pledge Payments" (page 21).

Because they are financial transactions, the codes assigned below need to be coordinated with your financial staff so that (1) they are unique¹⁵ within your financial system, (2) your financial staff can assign them "code mapping"¹⁶ for your accounting system, and (3) they have meaning to those entering pledges and payments.

1. Select **Systems** from the top list Figure 1. Then click Table Maintenance in Figure 2.
2. Click Fund Raising Codes in Figure 3. You see Figure 63.

Table Maintenance - <i>fd_tcodes</i>				
<input type="button" value="ADD New Record"/>		OR Edit Record (click on Button in the row): Sort Order		
Fund Raiser Type Codes	Disabled	Fund Raiser Activity	Fund Raiser Description	Pledge Required
(fdtcodes)	(disabled)	(fdact_code)	(fddescrpt)	(fdreq_pldg)
<input type="button" value="CG"/>	0	-	Cash Gifts	0
<input type="button" value="PP"/>	0	-	Constit Pledge Payment	1
<input type="button" value="CP"/>	0	+	Constituent Pledge	0
<input type="button" value="EP"/>	0	-	Employer Matching gift	1
<input type="button" value="1G"/>	0	-	One-time gift	0
<input type="button" value="RT"/>	0	-	Raffle Ticket	0

• Figure 63 Fund Raising Codes Table

The table is in alphabetical order by description, not by code.

3. To add a new Code, click the Add button in Figure 63. You get Figure 64.
To edit or delete a Code, click the Code "button".

Table Maintenance				
ADDING a new record to table: <i>fd_tcodes</i> . Note: No column can be left blank.				
Fund Raiser Type Codes	Disabled	Fund Raiser Activity	Fund Raiser Description	Pledge Required
(fdtcodes)	(disabled)	(fdact_code)	(fddescrpt)	(fdreq_pldg)
<input type="text" value="EP"/>	<input type="text" value="0"/>	<input type="text" value="-"/>	<input type="text" value="Employer Matching gift"/>	<input type="text" value="1"/>
<input type="button" value="Reset"/>				<input type="button" value="Submit"/>

• Figure 64 Fund Raising Codes Table Entry

4. In Figure 62, enter or change the data in the table, then click the Submit button.

¹⁵ It is possible to have a code in Fund Raising Codes Table that is identical to a code in the Transaction Code table. Make sure your financial staff agrees that this is correct and understands the complexity this adds to your financial records and to the auditing of those records.

¹⁶ This is a table named Pledge TCodes Mapping Table, see page 52.

Because of the financial effects and the way SONISWEB® controls what is seen in the pledge and payments displays, this table needs to be carefully and precisely filled in.

Fund Raiser Type Code is the unique financial transaction code¹⁵ that your financial staff has assigned for your use. SONISWEB® does not check for uniqueness.

You cannot change the code while editing. It is locked after you create it as shown on the right.

Fund Raiser Type Codes (fdtcodes)
EP

Disabled should be zero (0) unless you want to disable this code so it can no longer be selected. A one (1) means it is disabled and cannot be selected with pull-downs⁵.

Fund Raiser Activity is the debit (+) or credit (-) code used in accounting. A “+” is for a pledge and only appears on the Pledge pull-down⁵ (page 20). A “-” is for payments and only appears on the Payment pull-down⁵ (page 21).

Fund Raiser Description is a word or abbreviation that describes the transaction code. This is what appears in the pull-down⁵ selection in the displays.

Pledge Required controls how payments are made in Figure 29 (“Pledge Payments”) on page 21. With a 1 (the digit 1 which means True), you must pick a pledge when entering the payment in Figure 29. A 0 (digit zero which means false) allows this code to be used for one-time payments.

- To delete an entry, click the Delete button in Figure 62. You get a confirming display asking if you really mean it.

Funds Table

This table names the funds and is used in “Pledge” (page 20) and “Pledge Payments” (page 21).

- Select **Systems** from the top list Figure 1. In Figure 2 click **Funds**. You see Figure 65.

Funds			
Record 1 - 5 of 5			
Fund	Description	Disabled	
<u>AAI</u>	Annual Alum	N	
<u>BC</u>	Building Capital	N	
<u>GEN</u>	General Fund	N	
<u>LIB</u>	Library	N	
<u>LLL</u>	Library upgrade	N	

• Figure 65 Funds Table

- Click the Add button in Figure 65 for a new entry.
- Click the underlined abbreviation for a fund to edit it. That yields Figure 66.

Funds			
Fund	LLL	Description	Library upgrade
		Disabled	<input checked="" type="checkbox"/>
	<input type="button" value="Reset"/>		<input type="button" value="Submit"/>
		<input type="button" value="Delete"/>	

• Figure 66 Funds Table Entry

4. Make the changes in Figure 66. You cannot change the fund abbreviation once you have created it.
5. Click the Reset button to erase what you’ve entered so you can reenter it.
6. Click the Submit button to save your changes.

You disable an entry by clicking the “Disabled” checkbox until a checkmark appears. It’s like deleting it since no one can select it, but you can later enable it if you wish by clicking the “Disabled” checkbox until the checkmark disappears.

7. When you use the “Delete This Record” button, the entry is removed if it has not been used. An entry that has been used cannot be deleted since that would invalidate existing records. In that case, you can only disable it.

Giving Level Table

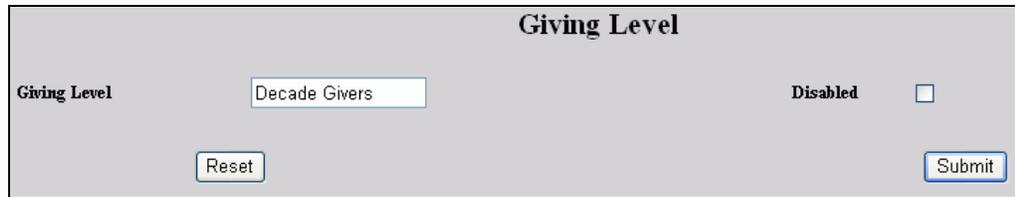
You can create giving levels to use in “Constituent Information” on page 14.

1. Select **Systems** from the top list Figure 1. In Figure 2 click Giving Level. You see Figure 67.

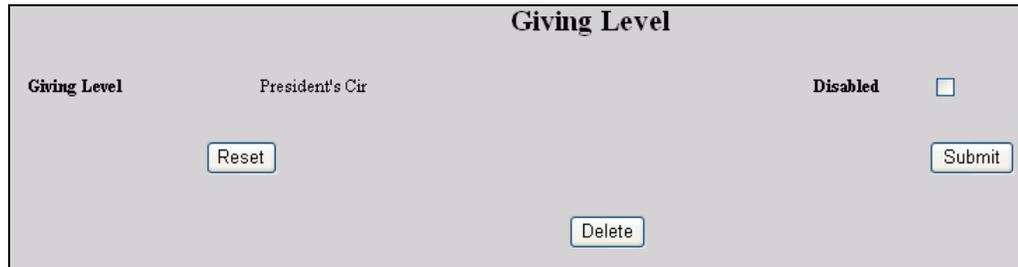
Giving Level		
Record 1 - 5 of 5		
Giving Level	Disabled	
<u>Annual < 250</u>	N	
<u>Annual 1000</u>	N	
<u>No Data</u>	N	
<u>President's Cir</u>	N	
		<input type="button" value="Add"/>

• Figure 67 Giving Level Table

2. Click the Add button to create a new entry. That yields Figure 68.
3. Click the underlined name of an entry to edit it. You get Figure 69.



• Figure 68 Giving Level Addition



• Figure 69 Giving Level Change

4. In Figure 68 you enter the name.
5. For editing, as shown by Figure 69, the only change you can make is to disable the entry or delete it.
6. Click the Reset button to erase what you've entered so you can reenter it.
7. Click the Submit button to save your changes.

You disable an entry by clicking the “Disabled” checkbox until a checkmark appears. It's like deleting it since no one can select it, but you can later enable it if you wish by clicking the “Disabled” checkbox until the checkmark disappears.

8. When you use the “Delete This Record” button, the entry is removed if it has not been used. An entry that has been used cannot be deleted since that would invalidate existing records. In that case, you can only disable it.

Pledge Activity Table

The purpose of a Pledge Activity is to automatically set up an activity (defined on page 35) so that a pledge, payment, or other action you take sets up a letter or an e-mail note as a thank-you or a reminder. A Pledge Activity is really a link between an activity you defined and a pledge or payment entry you make.

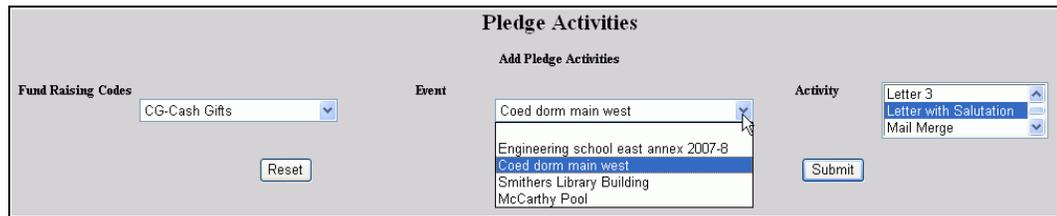
1. Select **Systems** from the top list Figure 1. Then click Table Maintenance in Figure 2.
2. In Figure 3 click Pledge Activities. That yields Figure 70

Only the ADD button appears in Figure 70 if no Pledge Activities have been entered.



• Figure 70 Pledge Activities List

3. Click DELETE to remove a Pledge Activity.
4. Click the ADD button to get Figure 71.



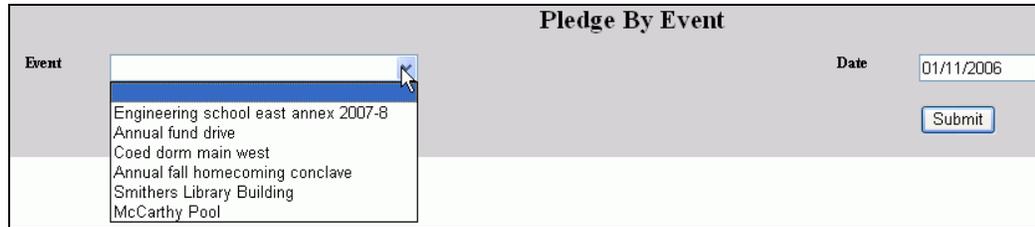
• Figure 71 Pledge Activity Record

5. In Figure 71 use the pulldowns⁵ to pick the Fund Raising Code (defined on page 46) and the Event (set up on page 44).
6. Pick one or more¹⁰ from the Activity list. (Any activity is valid, but usually you define special activities on page 35 to use for Pledge Activities.)
7. Click the Reset button to erase your selections so you can start over.
8. Click the Submit button to record this Pledge Activity. You return to Figure 70.

Pledge by Event Table

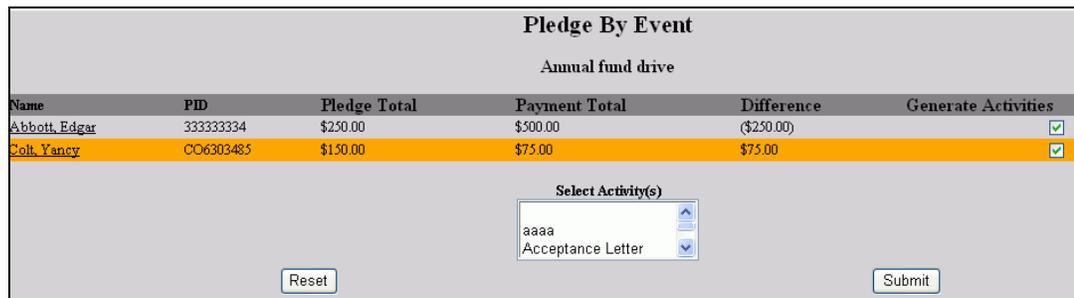
Pledge by Event has three roles:

- Show you the pledges and payments.
 - Optionally let you disconnect any Activities tied to this person's records.
 - Optionally let you connect an Activity (page 35) to this collection of Events.
1. Select **Systems** from the task bar in Figure 1. In Figure 2 click Pledge By Event. That yields Figure 72.



• Figure 72 Pledge by Event Selection

2. In Figure 72 use the pulldown⁵ to select the event you want to see, then click the Submit button. You get Figure 73.



Pledge By Event					
Annual fund drive					
Name	PID	Pledge Total	Payment Total	Difference	Generate Activities
<u>Abbott, Edgar</u>	333333334	\$250.00	\$500.00	(\$250.00)	<input type="checkbox"/>
<u>Calk, Nancy</u>	CO6303485	\$150.00	\$75.00	\$75.00	<input checked="" type="checkbox"/>

• Figure 73 Pledge Activities List

- To see the detail on a pledge, click the underlined name of the person.
 If there is a checkmark under “Generate Activities” for a person, it means that activities have been attached to this pledge or payment. They are likely to have been automatically attached by Pledge Activities (page 49). They may also have been attached using “Activities by Individual” (page 11) or “Adding Activities for a Group” (page 33).
- To disconnect those activities, click the checkbox⁵ until it is empty. All activities for that person will be deleted when you click the Submit button.
- To add new activities, pick one or more¹⁰ from the Select Activity(s) list. The Activities are added for all the persons in the list in Figure 73. You get a confirmation at the bottom of the display after clicking the Submit button.

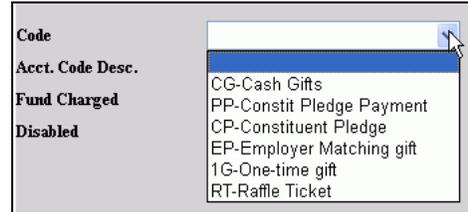
Activities added.

Pledge TCodes Mapping Table

“TCodes” means financial **T**ransaction **C**odes. Since payments must go to your institutional accounting system, the relationship between pledge codes and your accounting system must be defined. This is where you do it.

You must first set up the Fund Raiser Codes (page 46) before you can define this table.

3. Select **Systems** from the task bar in Figure 1. In Figure 2 click Pledge By Event. That yields Figure 75.
4. You pick the code you want to define from the pulldown⁵ list shown in Figure 74. These codes come from the Fund Raiser Codes table (page 46).



• Figure 74 Pledge Code Selection

Pledge: TCodes Mappings

Adding A Mapping

Code	1G-One-time gift	Accounting Code	60
Acct. Code Desc.	Cr	Acct.	110741
Fund Charged	UD25	Version	
Disabled	<input type="checkbox"/>	Project	Undes gifts
	<input type="button" value="Reset"/>		<input type="button" value="Submit"/>

• Figure 75 Pledge TCodes Mapping Entry

5. Fill in the fields in Figure 75. You will need your financial staff to guide you in these entries.
6. Click the Reset button to erase you selections so you can start over.
7. Click the Submit button to record it.

Relation Join

This table is the source of the pulldown⁵ list in “Relationships” and Figure 31 on page 23. If the relationship you need for Figure 31 is not available, you define it here. If you do not find Relation Join in Figure 2, ask your SONISWEB® administrator to add it.

1. Select **Systems** from the task bar in Figure 1. In Figure 2 click Relation Join. That yields Figure 76.
2. You can delete a relationship or you can create a new one as seen at the bottom of Figure 76.
3. In creating a new one, select from the two pulldown⁵ lists then click the Submit button.
4. If the “Relation” you need at the bottom of Figure 76 is not present, you or your SONISWEB® administrator will have to add it. It is in a table named “Relationships” under Table Maintenance.

Existing Relation Joins			
Relation		Relation	
contactee	OF	emrcontact	Delete
daughter	OF	father	Delete
daughter	OF	mother	Delete
dependent	OF	guardian	Delete
emrcontact	OF	contactee	Delete
father	OF	daughter	Delete
father	OF	son	Delete
friend	OF	friend	Delete
guardian	OF	dependent	Delete
mother	OF	daughter	Delete
mother	OF	son	Delete
sibling	OF	sibling	Delete
son	OF	father	Delete
son	OF	mother	Delete
spouse	OF	spouse	Delete

Create A New Relation Join			
Relation		Relation	
	OF		
<ul style="list-style-type: none"> contactee daughter dependent emrcontact father friend guardian mother sibling son spouse uncle 			Submit

• Figure 76 Relation Join Table

REPORTS USED IN DEVELOPMENT AND FUND RAISING

Fund raising reports vary so much from institution to institution that SONISWEB® provides the most common reports. Information on how to build your own custom reports is in the SONISWEB® text “Report Customization”.

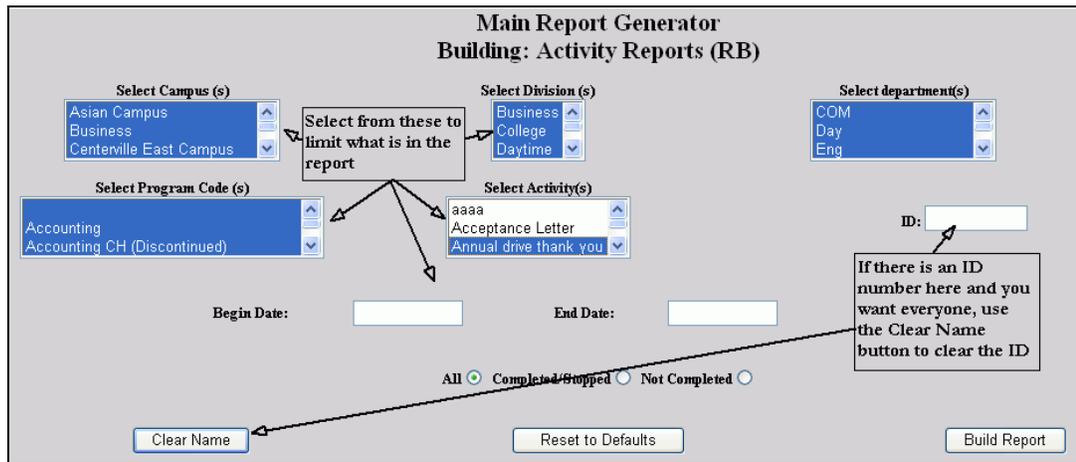
Starting the Reports

1. Log on to SONISWEB®.
2. Select **Reports** from the top list (Figure 1). You get Figure 2.

Your security profile must be set for you to access the reports. If **Reports** or the report list are not offered, see your SONISWEB® administrator.

Activity Reports

1. From the list in Figure 2, click Activity Reports (RB)¹⁷.



• Figure 77 Activity Reports Selection Prompt

2. Decide who this list is for, then pick the campuses, activities, etc. they are responsible for. In Figure 77 select those campuses¹⁰ and activities¹⁰. You can limit the report to a single person by entering her or his ID.

If you have been processing a person’s records, you may find his or her ID in Figure 77. Use the Clear Name button to erase the ID number so you get all the people who meet your campus and activity criteria.

¹⁷ “RB” means the report was built using the ColdFusion™ Report Builder, a no-cost addition to ColdFusion™ that works with every known Web browser. Reports without “RB” in the name were built with Crystal Reports™-Enterprise for prior versions of SONISWEB®. Although still available in SONISWEB®, Crystal Reports™-Enterprise has an added cost and, in some cases, does not work correctly with all browsers.

3. Click the Build Report button. After a pause to access the database, you'll see Figure 78.
4. Click Preview Report in Figure 78 to get Figure 79.



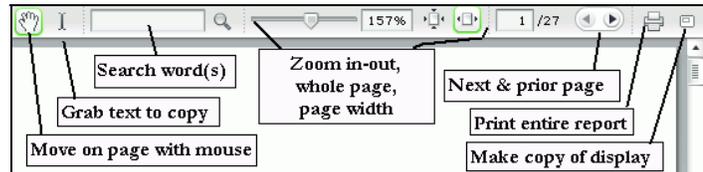
• Figure 78 Preview Report Prompt

01/12/2006	11:25:57 AM	SonisWeb200	Page 1 of 27			
Activity Report						
Date Range: All						
Activity	Name	ID#	Activity Date	Done Date	Stop Date	Campus
Acceptance Letter						
1)	Abbott, Edgar M	333333334	01/28/2005			CAMP1
2)	Adams, Morticia J	312115555	01/28/2005			CAMP1
3)	Adams, Amy A	000000000	01/28/2005			CAMP1
4)	Arston, Arnie	AR9959292	01/28/2005			CAMP1
5)	Black, Nicholas	BL1090677	10/14/2003	12/08/2003		TBD
6)	Brown, Elizabeth A	047557878	01/28/2005			CAMP1
Annual drive thank you						
1)	Abbott, Edgar M	333333334	07/01/2005	12/01/2005		CAMP1

• Figure 79 Activity Report

Figure 79 is a small portion of a report. The list is in alphabetical order by Activity then alphabetically by last name.

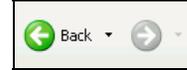
You can use the controls at the top of the report display to zoom, pan, page, print, etc. as shown in Figure 80.



• Figure 80 Report Controls for ColdFusion™ Report Builder

Fundraising Report

This report has a summary, details, and optional charts. You can use the back and forward browser buttons¹⁸ to move between the reports.



- From the list in Figure 2, click Fundraising Report. You see Figure 81.

Fundraising Report						
07/05/06 10:58 AM						
Report covers between 12/30/1899 and 12/31/2050.						
Event	Fund	Activity Type	Transaction Code	Description	Count	Amount
Annual fund drive	Annual Alum	Debit	CP	Constituent Pledge	5	\$2,400.00
Annual fund drive	Annual Alum	Credit	PP	Constit Pledge Payment	4	\$2,325.00
Annual fund drive	Annual Alum	Credit	EP	Employer Matching gift	1	\$250.00
					Total Credits:	\$2,400.00
					Total Debits:	\$2,575.00
					Remainder:	(\$175.00)
Coed dorm main west	General Fund	Debit	CP	Constituent Pledge	5	\$782.00
Coed dorm main west	General Fund	Credit	CG	Cash Gifts	1	\$16.66
Coed dorm main west	General Fund	Credit	PP	Constit Pledge Payment	2	\$101.00
Coed dorm main west	General Fund	Credit	RT	Raffle Ticket	2	\$23.00
					Total Credits:	\$782.00
					Total Debits:	\$140.66
					Remainder:	\$641.34
Engineering school east annex 2007-8	Building Capital	Debit	CP	Constituent Pledge	1	\$25.00
Engineering school east annex 2007-8	Building Capital	Credit	PP	Constit Pledge Payment	1	\$25.00
Engineering school east annex 2007-8	Building Capital	Credit	EP	Employer Matching gift	1	\$25.00
					Total Credits:	\$25.00
					Total Debits:	\$50.00
					Remainder:	(\$25.00)

• Figure 81 Fundraising Report Summary Display

Charts

Both Events Only Funds Only

• Figure 82 Bottom of Figure 81

- Figure 81 is the summary report. It is too large to show clearly on this page. It is in order by and Event (page 44), Fund (page 47), and then Debits and Credits. You can print this report by clicking the browser printer icon.

Fundraising Report					
07/05/06 11:01 AM					
Report covers between 12/30/1899 and 12/31/2050.					
Activity Type	Transaction Code	Description	Event	Fund	
Credit	EP	Employer Matching gift	Annual fund drive	Annual Alum	
Name	Amount	Campus	Division	Department	Level
Abbott, Edgar M . (333333334)	\$250.00	Centerville Main Campus	Daytime	Liberal Arts	Not Applicable
Individual total:	\$250.00				
Grand total:	\$250.00				

• Figure 83 Fundraising Report Detail

¹⁸ These buttons cannot be used for most SONISWEB® displays since most of them update your database and cause errors in the process; you get an error message if you use them. Since this report doesn't update the database, you can use the buttons.

3. To see the detail for any line in Figure 81, click its underlined description in Figure 81. A report like Figure 83 is the result.
4. To see other detailed records or the charts, click the browser's Back button to return to Figure 81.
5. The chart choices are at the bottom of Figure 81 (Figure 82). You can see one consolidated chart or see them individually as illustrated in Figure 84 and Figure 85.
6. The colors you see in Figure 84 and Figure 85 will vary depending on the kind of browser and color setting you have on your computer.
7. To return to Figure 81, click the browser's Back button.

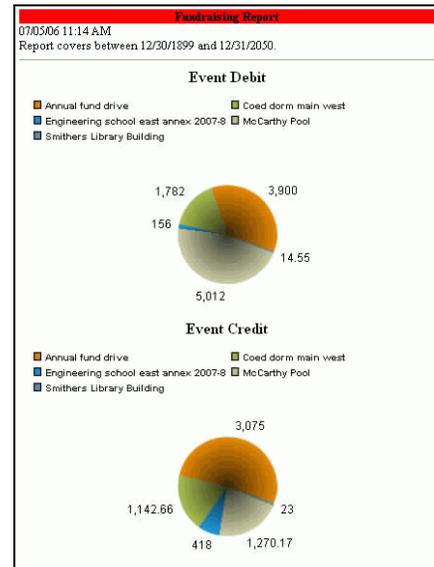


Figure 84 Events Chart

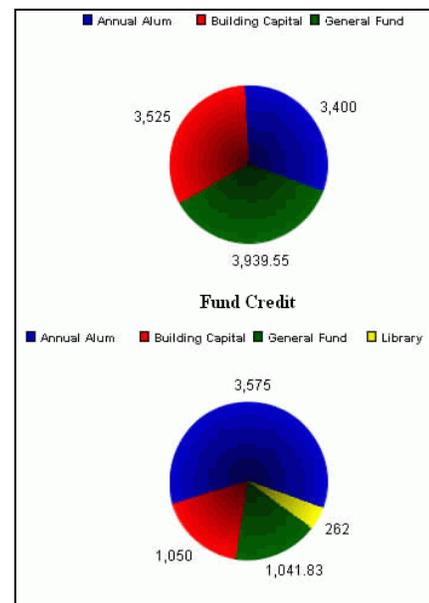
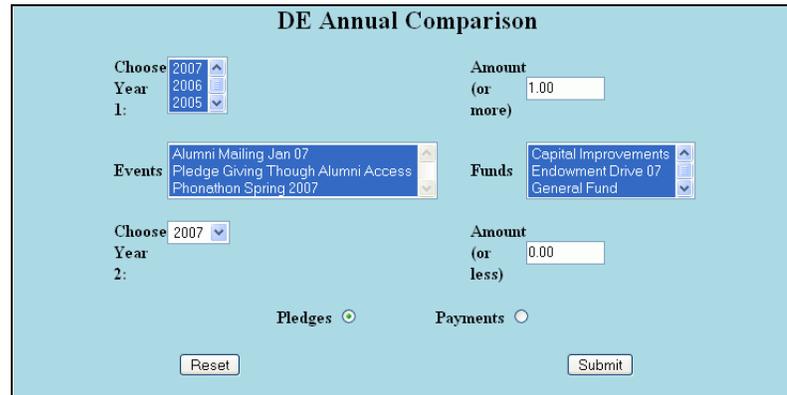


Figure 85 Funds Chart

Fundraising Search

This search is used to see who is contributed to events and funds and when they contributed. It gives you a report, a file with a list, the ability to add an activity, or an e-mail note you can send.

Click **Financials** in Figure 1 and then **DE Annual Comparison** in Figure 2. You see Figure 86.



• Figure 86 DE Annual Comparison

Typically you compare this year's pledges to those from past years. For that you select the current year in "Year 2" and select the past years you want to check in "Year 1".

Enter the amounts for each year and then pick the Pledges or the Payments radio button. You can further restrict the search by specifying the Events and/or Funds to include.

Click the Submit button to begin the search.

**Either no one pledged at least \$1.00 in year(s) 2002,
or everyone in the year(s) 2002 who pledged at least \$1.00 pledged at least \$0.00 in 2006.**

• Figure 87 Fundraising Search - No one Found



• Figure 88 Fundraising Search Users Found

The results are in Figure 87 or Figure 88. Figure 87 means none were found that met the criteria you set in Figure 86.

The results in Figure 88 give you these options:

- Click **Return** to go back to Figure 86 and change the search criteria.

- Preview Report shows you the list of people found with the query. Figure 89 shows it.

Fundraising Search Report					
Name	PID	Electronic Mail	Telephone	Preferred Address	Year(s) Pledge Total
Anderson, Anna	AN8321568	where@what.com	560-342-4762	2375 Market St. Charlottesville, VA 22901	\$50.00
Applegate, Cynthia H	909090909	c@mail.com		100 Center Street Chapel Hill, NC 27516	\$40.00
Sanderson, Glenda T	047778989	?	919-777-6666	5555 Westgate Raleigh, NC	\$12.00

• Figure 89 Report from Search

- ... Distinct Users shows you how many were found based on your selections in Figure 86. Click it to get Figure 90.

Fundraising Search						
Year 1: 2005,2003,2002 pledged at least \$1.00.						
Year 2: 2006 pledged \$0.00 or less.						
? No Valid Email Address.						
Select	Name	PID	Electronic Mail	Telephone	Preferred Address	Year 1 pledged total
<input checked="" type="checkbox"/>	Anderson, Anna	AN8321568	where@what.com	560-342-4762	2375 Market St. Charlottesville, VA 22901	\$50.00
<input checked="" type="checkbox"/>	Applegate, Cynthia H	909090909	c@mail.com		100 Center Street Chapel Hill, NC 27516	\$40.00
<input checked="" type="checkbox"/>	Sanderson, Glenda T	047778989	?	919-777-6666	5555 Westgate Raleigh, NC	\$12.00

[Return](#)

• Figure 90 List of Users from Search

The checkmarks under Select in Figure 90 mean these persons are to be included in the action you start with the buttons at the bottom. To exclude a person, click the checkbox until it's blank.

The question mark (?) in place of the e-mail address means there's no e-mail address for this person. So if you use the Email button in Figure 90, those persons will never be sent the e-mail note in spite of the checkmark.

Reset erases any checkmark changes you've made so you can start over.

Export List puts the list in a file for you to use as you wish. When you click the button, your browser asks you where you want it saved on your computer. Once on your computer you can open it in any spreadsheet program that supports the "xls" (Excel) file format.

Add Activity opens a dialog with the Activities function of SONISWEB® so you can create and add an activity for your records, shown in Figure 91.

As Figure 91 shows it's much like adding an "Activity by Group", a standard SONISWEB® function. All those in the list with checkmarks (Figure 90) have the activity added for them.

Fundraising Search

Activity: Pledge Letter Activity Date: 04/24/2006

Completed:

Date Completed: Date Stopped:

Comments:

User Defined Field: cccccc 0

Buttons: Reset, Delete, Submit

• Figure 91 Add Activity

Email gives you a prompt display for entering the e-mail note as shown in Figure 92. When you click the Submit button, the note is sent except to those with a question mark in their e-mail address (Figure 90) indicating they don't have valid e-mail addresses.

Fundraising Search

Subject: Buidling Dedication May 21

Message:

As one of our loyal contributors, you are invited to see what you have given to the college. Please be our guest

Buttons: Reset, Submit

• Figure 92 E-Mail from Search Results

Mail-Merge, E-Mail Merge, Mailing Labels, Timed Letters, and Timed E-mail

These mailing processes¹⁷ are fully covered in two manuals:

“Mail, E-Mail Merge, and Mailing Labels” (file name = MailE-MailMergeLabels.pdf)

“Timed Letters, Timed E-Mail & Timed Mail-Merge” (file name = TimedLetters.pdf)

This is a summary to show how it works. See the manuals listed above for the details.

In addition to the standard choices shown in Figure 77, some reports offer the “labels” option shown in Figure 93. Your SONISWEB® administrator may make these optional “label” fields active for your school and then tell you when and what to use them for. An example of use is to provide an addition so that a person’s financial trustee is informed in a mailing.



• Figure 93 Reports Labels Option

Mail-Merge and Timed Mail Merge

You run a report that really isn’t a report for printing as Figure 94 shows. Rather, you create a list that you export as a file that contains names, addresses, etc., of those selected in the report prompt like that shown in Figure 77 and Figure 78.

activi	soc_sec	last_name	first_name	MI	Prefix	Suffix	st_addr	add_addr	add_add2	city	state	zip	country	phone
ACC	00000000	Adams	Amy	A.	Dr.		115 Poplar			Chapel Hill	NC	27516	U.S.A.	

• Figure 94 Mail-Merge "Report" Example

You normally export that file in a spreadsheet format like Excel. It is then used as input to a word processing program like Word to create the custom letters.

After you view and export the report-file, you have the option to post the completion of this activity in the Activity record (page Figure 11, page 12) of each person selected. Click the button in Figure 95 to do that.



• Figure 95 Post Activity Option

Timed Letters

The text for timed letters is what you put in the “Memo” field when you set up the activity. See Figure 52 on page 37 for an example.

You make selections like those in Figure 77. You get a prompt like Figure 96.

The report one page for each letter. You print them, usually on letterhead paper, for mailing.

The labels are an option shown in Figure 96. The labels are three across for printing on label paper. They appear in the same order as the letters for easier collation.



• Figure 96 Timed Letter Choices

After you print the letters and, optionally, the labels, you have the option to post the completion of this activity in the Activity record (page Figure 11, page 12) of each person selected.

Mailing Labels

You make selections like those in Figure 77. The report is an Adobe® PDF file that you print on label paper immediately or save for later printing.

Parking Incident Reports

Depending on how you defined Parking Incidents, they can include both damage a person had while parking on campus as well as infractions. If you track parking incidents for Constituents (see page 18), you can use this report

From the list in Figure 2, click Parking Incidents (RB)¹⁷ follow the process like Figure 77 and Figure 78. You get Figure 97, the summary report.

01/12/2006	03:44:00 PM	SonisWeb200	Page 1 of 1
Parking Incidents			
Click on Incidents for Details			
Incident Type	Count		
Damage in lot or	1		
Total Incidents: 1			

Figure 97 Parking Incident Report Summary

Parking Incidents - Details			
Incident Type	Name	Start Date	End Date
Damage in lot or	Abbott, Edgar (333333334)	04/12/2001	04/12/2001

• Figure 98 Parking Incident Report Detail

Click an incident in Figure 97 and you see Figure 98, the details.

Pledges by Event

- From the list in Figure 2, click Pledges by Event.

PLEDGES BY EVENTS AS OF 01/12/2006					
Event	Target	Pledged	Paid	Start	Stop
2007 Engineering Annex	1,200,000.00	100,000,055.00	20,011.10	02/02/02	05/15/06
Annual fund drive	1,250,000.00	400.00	325.00	06/01/90	12/30/99
Dorm West	950,000.00	789.00	61.00	06/01/04	06/01/05
Homecoming	500,000.00	0.00	0.00	08/01/90	12/30/99
Library	850,000.00	34.55	6,023.00	01/01/01	06/01/05
Pool	350,000.00	123,032.00	67.17	01/03/02	01/03/03

• Figure 99 Pledges by Event Summary

As Figure 99 and Figure 100 show, a summary appears first. Click the underlined name of an event and you see Figure 100.

Pledges for Annual fund drive as of 01/12/2006			Return
	Constituent	Amount Pledged	Amount Paid
1)	Abbott, Edgar M	\$250.00	\$250.00
2)	Colt, Yancy	\$150.00	\$75.00

• Figure 100 Pledges by Event Detail

The detail in Figure 100 includes all the persons who have pledged.

2. Click **Return** in Figure 100 to return to Figure 99.

This report uses neither the ColdFusion™ Report Builder nor Crystal Reports™; click the browser's print icon  to print the report.

Other Optional Reports

Your SONISWEB® administrator may have authorized you to print other reports not directly part of development and fund raising. Information on those reports is in the SONISWEB® manual "Reports".

GETTING STARTED - LOG IN AND THE USE OF TABS, BUTTON AND FIELDS

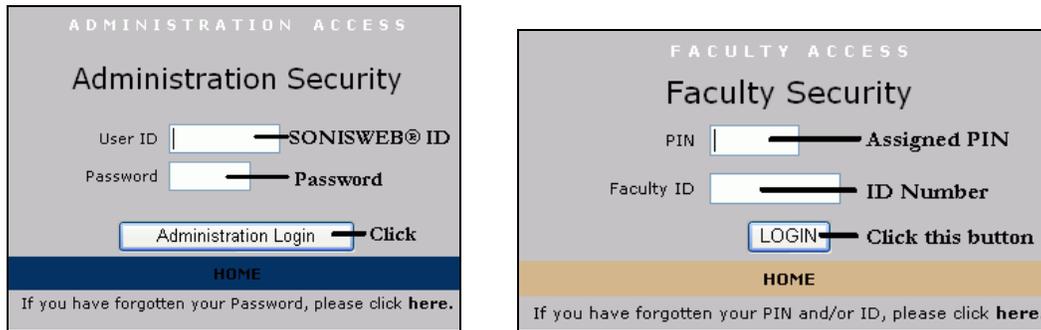
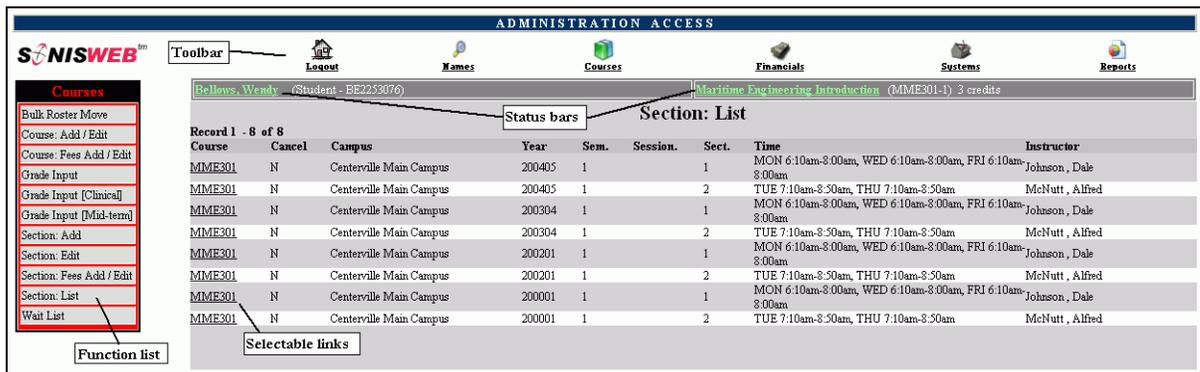


Figure 101 Login Displays

To log in as an administrator, select that option from your Web page. The standard SONISWEB® login pages look like Figure 101.



• Figure 102 Typical SONISWEB® Page

Figure 102 is a typical SONISWEB® page. The actions authorized in your profile appear at the top, called the **Toolbar**.

When you make a selection from the **Toolbar**, the applicable **Function List** appears on the left. Only the functions authorized in your assigned profile and your individual limits and privileges appear. Some might have only **Courses** in the toolbar and only **Course: Add/Edit** for functions.

Not apparent on the display is whether or not the profile permits editing or changing the information. Once the you select a function from the list on the left, you will see a Submit or similar button at the bottom of the display if you have the permissions to add, edit, or delete the data.

By clicking a **Status Bar** you quickly return to the “person” or the “course” you were processing even if you left it temporarily to look at a financial display or a report. Of course, if you have not selected a person with **Names** or a course with **Courses**, there will be no **Status Bars** at the top.

In Figure 102 click an underlined **Selectable Link** and you go to that record.

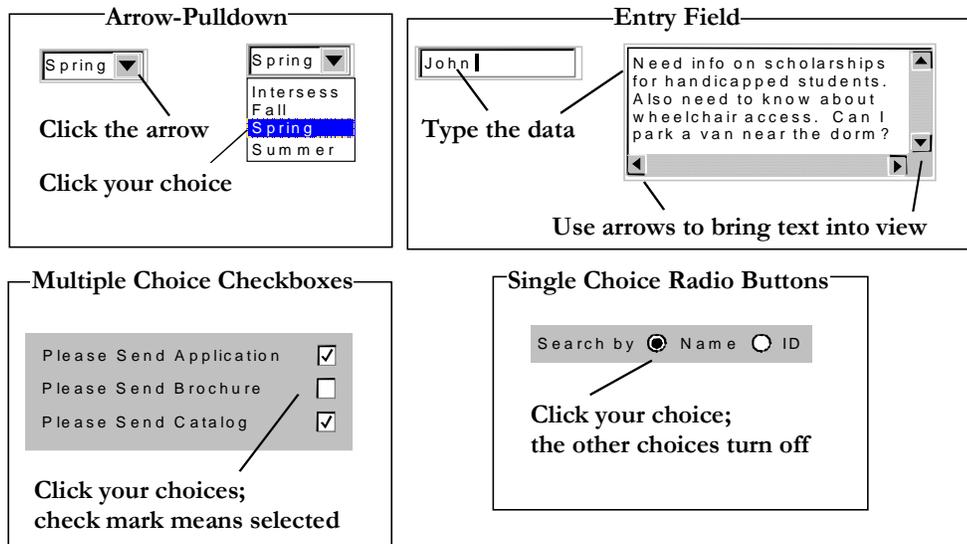


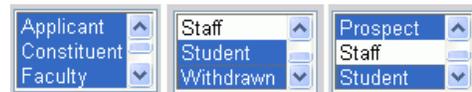
Figure 103 Arrows, Fields, Checkboxes and Buttons

SONISWEB® prompts you for information with windows like those in Figure 103. Use your mouse to click your selection.

- Once you have made your selection(s), you must click an action button; usually it is Submit, Delete, Reset, etc.
- For Entry Fields, click the beginning of the field so you don't get any blanks inserted in front of your entry.
- With Multiple Choice Checkboxes, each time you click a box it goes from selected (check mark) to unselected (no check mark). Click it again and it is selected, etc.
- Radio Buttons allow only one to be selected; when you click one, all the others are turned off.

Some SONISWEB® lists permit you to make multiple choices. It works just like most PC spread sheet software.

- To pick two or more in a series, click the top selection, hold down the **Shift** key on the keyboard and click the bottom item in the series. Release the shift key and they are selected as shown on the left and middle of Figure 104.



• Figure 104 Selecting Multiple Choices

- To pick two or more that are not adjacent, click the first item, hold the **Ctrl** key on the keyboard, select the next item and the next, etc. When you have picked the last item you want, release the **Ctrl** key and you see the selections like those on the right of Figure 104.