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ABILA MILLENNIUM
AS 102 Biographical Data Entry

Abila University
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Abila Millennium

AS 102 BIOGRAPHICAL DATA ENTRY

STUDENT WORKBOOK
ABILA LEARNING SERVICES

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Contents

AS 102 Biographical Data Entry

Contents	3
Welcome	7
AS 102 Biographical Data Entry	7
What You Will Need to Understand	8
Logging In	8
Logging into Abila Millennium	9
Logging into Abila Millennium if you are logged on at another workstation	10
Logging out of Abila Millennium	11
Navigating within Abila Millennium	11
Abila Millennium Structure	12
What You Will Need to Get Started	14
What You Will Learn	14
Entering a New Constituent	15
Step 1: Performing a Constituent Search	15
Entering Constituent Search Information.....	16
Step 2: Assign an ID and Data Entry Information.....	18
IDs.....	18
Basic Data Input Screens	18
Data Entry Techniques	20
Data Entry Forms.....	20
Lookup Table Columns.....	21
Free Text Columns	23
Date Columns	24
Checkboxes	25
Money Text Boxes	26
ID Text Boxes	27
Step 3: Input the Basic Data Table Information.....	28
The Basic Data Table	28
Data Entry	30
Data Review and Edit	31
Step 4: Input the Name Table Information	32
Data Entry	33

Step 5: Input the Address Table Information	35
Preferred Addresses	36
Data Entry	37
Verifying Your Data	39
Notes	43
Adding Constituent Data	45
Adding Rows to a Table	45
Display the Table	45
Three Methods to Insert New Information	46
Adding Rows to Other Abila Millennium Tables	49
The Employment Table	50
Data Entry	50
Entering a Non-Constituent Company Employment Row	54
The Education Table	56
Data Entry	56
The Attributes Table	59
Data Entry	59
The Correspondence Table	62
Data Entry	62
The Relationships Table	65
Data Entry	65
Constituent Relationships	66
Linked Contact Information	69
Non-Constituent Relationships	71
Spouse/Spouse Relationships	75
Employer/Employee Relationships	81
The Circle Table	81
Circle and the Relation Tree	85
Circles Data Editing/Updating	87
The Comments Table	89
Data Entry	89
Notes	91
Coverage.....	93
Creating a New Coverage Record.....	94
Multiple Coverages	97
Spouse Coverage	98
Notes	99
Linked Rows, Secondary Table Rows and Attachments.....	101
Creating Linked Rows	101
Creating a Linked Row through a Primary Table	101
Display Options.....	104
Linking a Phone Number to an Address	105
Creating a Linked Row to Another Constituent	110
Linking Existing Rows.....	112
Within the Same Constituent's Record	113
Linking Two Existing Rows between Constituents	115
Unlinking Attribute Rows	117
Secondary Table Rows	118
Display Options.....	119
The Citizenship Table	119

Data Entry	119
The Death Table	120
Data Entry	121
The Phone Numbers Table	125
Data Entry	125
The Internet Address Table	126
Attachments	127
To Link an Attachment	128
Unlinking Attachments	129
Alerts	130
Notes	134
Editing and Deleting Rows	135
Editing and Deleting Rows	135
Verifying Edits	135
Updating a Constituent's Address Information	136
Updating Other Information	138
Deleting Rows	138
Deleting the Constituent from the System	139
Notes	141
Hypertext Links	143
Automatic Relationship Links	143
Entering a Constituent Relationship	143
Entering a Constituent Employment Row	144
Linked Addresses	145
Spouse Linked Addresses	145
Other Linked Addresses	148
Linked Business Addresses	150
Unlinking or Deleting Linked Addresses	153
Address/Employment Links	154
Inputting Linked Employment through Addresses	154
Unlinking or Deleting Linked Employment	159
Notes	160
Default Forms	161
Defining a Default Form	162
Using a Default Form during Input	165
Storing, Editing and Deleting Default Forms	166
Using Default Forms to Enter Constituents	168
Notes	169
Final Exam	171
Instructions	171
Associate's Degree	171

Welcome

AS 102 Biographical Data Entry

The second in the Associate's Program workbook series, **AS 102 Biographical Data Entry**, builds upon the foundation established in **AS 101 Basic Navigation**. With an understanding of how Abila Millennium's tables are organized, how to retrieve and view data and navigate through the system, you are now ready to learn the data entry process.

AS 102 Biographical Data Entry focuses on the demographic information found under Biographical Data in the Abila Millennium Explorer. We will define each of the columns in these tables and offer our suggestions for usage of these columns. While we recommend that you adhere to entry standards in certain key columns, you'll see that Abila Millennium provides frequent opportunities for you to design your own database by customizing the use of many available columns.

You'll begin your program by learning how to enter a constituent into the database from scratch. In order to take full advantage of Abila Millennium, you'll also learn how to establish cross reference links between rows.

A very valuable tool for the data entry operator, defaults (or prototypes) allows the design of a template that provides standard values for mass entry of similar information. You'll learn how defaults will assist you in quickly entering identical rows for selected constituents without retyping the information each time.

Along with defaults, we'll also offer tips and techniques for data management that may assist you in maintaining an accurate and reliable source of information for your fundraising officers.

Abila Millennium's graphical interface and push button operations help take the monotony out of data entry. We hope you enjoy it, and have some fun!

What You Will Need to Understand

Logging In

To enter the world of Abila Millennium, you must first understand how to log into the system. Let's begin with a discussion on the basic pieces of information that are necessary to access Abila Millennium.

The three pieces of information needed to access the system are user name, password, and server name. This information is provided to you by your system administrator. If this information has not already been provided to you, please contact your system administrator before beginning.

- Your user name and password are case sensitive. This means you must reproduce the exact uppercase/lowercase combination of characters; otherwise, your system will not recognize your login.
- Notice that as you type your password into the text box, the characters appear as asterisks. This helps to protect the confidentiality of your password.



NOTE: Remember your password! Only you should know your password. Passwords should be changed occasionally for security purposes. This is especially important for those with extensive access to Abila Millennium data.

Now that we have a basic understanding of the different pieces of information needed to log into the system, let's discuss how you actually log into the system.

Logging into Abila Millennium

To log into Abila Millennium via the internet, double click on the Internet Explorer icon located on your desktop or single click the Internet Explorer icon in your quick launch tool bar.

Once Internet Explorer opens up, type the name of the server in the Address bar.

Abila Millennium provides you with the login form. At this point, you enter your user name and password provided to you by your system administrator.



The screenshot shows a web browser window with a teal header bar containing the text "Abila Millennium". Below the header, the text "Log On" is displayed in a large, teal font. Underneath, the instruction "Please enter your user information." is followed by two input fields: "User ID:" and "Password:". Below the password field, there is a link that says "Click [here](#) to change your password." At the bottom of the form, there are two buttons: "Submit" and "Clear". At the very bottom of the page, there is a warning message: "WARNING: You may only use this software if you are an authorized user under the Abila license agreement. If you are not an authorized user, you must cease use of this software immediately. © 2014 Abila, Inc. and its affiliated entities. All rights reserved." The Abila logo is visible in the bottom right corner.

Click Submit or press Enter on the keyboard.

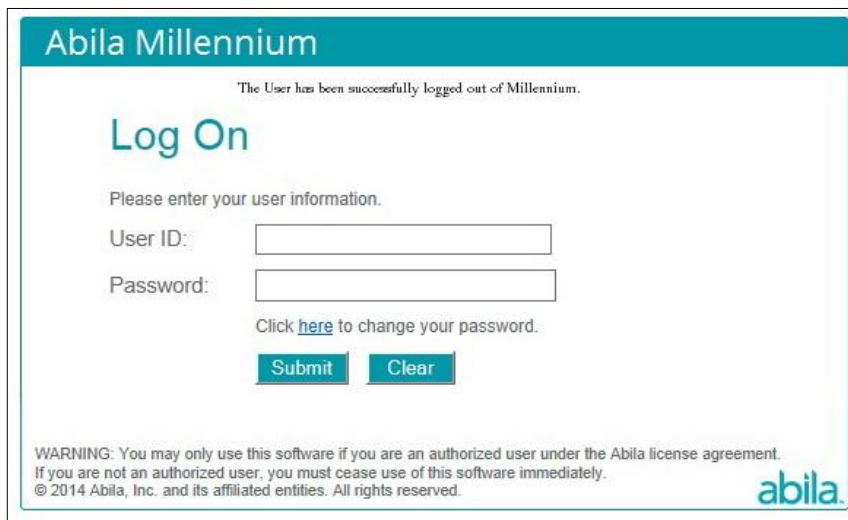
Logging into Abila Millennium if you are logged on at another workstation

If you attempt to log into Abila Millennium using the Internet Explorer, Abila Millennium will present the Abila Millennium Log On form with the message that you are currently logged on at another workstation. At this point, enter your user name, password and check **Log Out** then click **Submit**.




The screenshot shows the Abila Millennium Log On form. At the top, there is a teal header with the text "Abila Millennium". Below the header, a red-bordered box contains the message: "Sorry, you are currently logged on at another workstation. Please use a different log on or log out." Below this message, the "Log On" section is visible. It includes the text "Please enter your user information." followed by two input fields: "User ID:" and "Password:". Below the "Password:" field, there is a checkbox labeled "Log Out" which is highlighted with a red border. Below the checkbox, there is a link: "Click [here](#) to change your password." At the bottom of the form, there are two buttons: "Submit" and "Clear". At the very bottom, there is a warning message: "WARNING: You may only use this software if you are an authorized user under the Abila license agreement. If you are not an authorized user, you must cease use of this software immediately. © 2014 Abila, Inc. and its affiliated entities. All rights reserved." and the Abila logo.

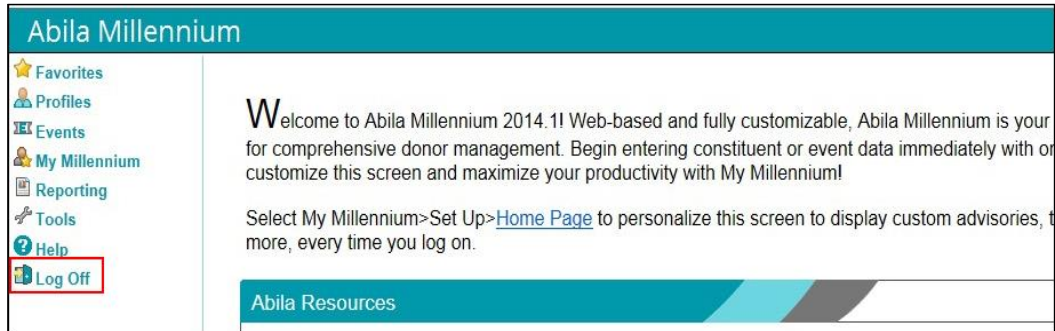
Once the system logs you out of the other workstation, it will provide you with a blank form for you to input your information to log on from your current location.



The screenshot shows the Abila Millennium Log On form after the user has been successfully logged out. At the top, there is a teal header with the text "Abila Millennium". Below the header, the message "The User has been successfully logged out of Millennium." is displayed. Below this message, the "Log On" section is visible. It includes the text "Please enter your user information." followed by two input fields: "User ID:" and "Password:". Below the "Password:" field, there is a link: "Click [here](#) to change your password." At the bottom of the form, there are two buttons: "Submit" and "Clear". At the very bottom, there is a warning message: "WARNING: You may only use this software if you are an authorized user under the Abila license agreement. If you are not an authorized user, you must cease use of this software immediately. © 2014 Abila, Inc. and its affiliated entities. All rights reserved." and the Abila logo.

Logging out of Abila Millennium

To log out of Abila Millennium, you **MUST** select **Log Off** in the Abila Millennium Explorer. If you select the  in the upper right corner of the web page, the system will still recognize you as being logged into the system.



Navigating within Abila Millennium



The Abila Millennium Explorer provides one method of navigating within Abila Millennium. The different subsystems and the tables available within each subsystem are available along the left-hand side of the browser page.

To select a table from one of the three categories of information – Biographical, Giving, and Prospect – the user selects the + symbol next to the area of information to expand the menu bar.

Abila Millennium Structure

A short explanation of the structure of a database is necessary as background. Because many of the terms will be used throughout the program, we want to take this opportunity to discuss how Abila Millennium organizes and stores your constituent data, as well as provide you with some basic database terminology. We encourage you to read this section before you delve into the world of Abila Millennium.

Let's first define some basic terms:

Term	Also Known As:	Definition
Database	N/A	(1) A database is defined as a large collection of data stored together and organized for rapid search and retrieval. (2) A database may also be a program that manages data, such as Abila Millennium, and can be used to store, retrieve, and sort information.
Table	File	A presentation of information organized in rows and columns each describing an entity, for example, address. The columns of a table represent characteristics of the entity and a row represents one instance of the entity.
Row	Record	A table consists of many rows which may be defined as a standard unit of related information. For example, the address table consists of many rows belonging to different individuals.
Columns	Field	Each individual column represents a certain characteristic of the table. For example, the address table may include such columns as: address line 1, address city, address state, address zip code.

Now that we have defined some terms, let's begin to relate it to Abila Millennium!

All of the data stored within Abila Millennium is collectively referred to as the database. The Abila Millennium database consists of many tables such as:

- Basic Data
- Names
- Address
- Employment
- Gifts

Abila Millennium Data Table – Basic Data (corebio)

	corekey	coreid	core doc	coredate	coreuserid	core ugrp	core const	core sex	core maritl	core chld
	564045834	0023495	y	19979143	gir	A	I	M	001	01
ROW →	534598340	0034986	n	19483434	fir	B	I	M	002	02 ←
	234985354	8409584	n	19483443	gib	R	I	F	001	
	854953535	6494048	n	20448556	figtot	Y	C		004	
	589453055	0048567	y	19485758	bir	R	O		002	00
	455366953	5859356	n	19485857	vifgijh	C	H	F		

Tables

As defined earlier, each table within the database stores a particular kind of information. For example: the Basic Data table holds vital statistic information; the Address table holds street, city, state and zip code information; and the Jobs table holds information regarding employment. Within each table, the way the information is stored may be envisioned as a set of divided shelves which make up a bookcase, or a grid made up of rows and columns.

Rows

As defined earlier, within each table, the data is further organized into a standard unit of related information called rows. What is a standard unit of related information? Well, for example, the information, 15 Buford Road, is not very useful unless it is associated with the applicable city and state. Of course, the resulting address row has little meaning unless it is associated with a particular constituent.

In most of the data tables, each constituent could own several rows. For instance, if a constituent obtained three different college degrees, then they could potentially have three separate education rows in the Schools table reflecting the information related to each degree.

Columns

Each row within a table is divided into distinct columns. Columns structure the data for efficient data entry, storage, retrieval, and selection. For example, each table includes a column for the ID number of the constituent who owns the row, a column for the date on which the row was created, the logon ID of the operator who created the row, and so on.

What You Will Need to Get Started

Prior to beginning this workbook, make sure you have access to the Abila Millennium training database. If you need assistance connecting to the database, please see your System Administrator or contact our office.

Ask your System Administrator for the user id, password and server you will need to conduct the training.

Although printing is only minimally featured in this workbook, it is recommended that you establish some printing capability – if you don't already have it. Abila Millennium uses the default printer as established by the Windows Print Manager.

We recommend that you make your own copy of this workbook so that you may incorporate your own notes into the material.

What You Will Learn ...

- How to enter a constituent record
- How to identify and use the different types of columns
- How to add rows
- How to input linked rows and attachments
- How to edit or delete rows
- How to establish hypertext links
- How to define and use default forms

Entering a New Constituent

Step 1: Performing a Constituent Search

The first step in entering a new constituent into your system should be very familiar to you by now – the Constituent Search. Prior to entering data, the required constituent search provides a safety mechanism that helps prevent duplicate entries into the database.

Based on the name and other information you type into the Constituent Search Form, Abila Millennium executes a search for the constituent prior to accepting the data for entry.

If the constituent search discovers identical information in the database, the matching constituent(s) will be listed for your review.

Here at Abila Millennium University, we've just received a donation from a brand new donor.

Before we can go ahead and enter the gift, however, we need to enter the constituent into our database.

Log on to the Abila Millennium database with your assigned User ID.

Select **Profiles**.



Our new donor's name is Clark Kent (Yes, this will become a developing theme.) Clark lives in Williamsburg, VA 23188 and is an alumnus (Constituency Type – Alumni) of Abila Millennium University.

Entering Constituent Search Information

- Enter the constituent's name into the Constituent Search Form.
- While the search function does not require an exact case match, we recommend that during the data entry process you type in the constituent's name using the correct combination of upper and lower case characters.
- Abila Millennium will fill in the appropriate name columns later in the data entry process using whatever you type here in the search form. If you enter all lowercase or uppercase characters now, you will have to edit the information later. Save yourself the trouble.
- We also recommend that you set your **defined display** to show (as a minimum) the basic data table, the names table and the address table. These tables contain the standard information you will require for all your constituents. As you create the constituent's rows, starting with the basic data table, Abila Millennium will display the empty names and address tables, prompting you to enter that most important information. Good idea, huh?
- One final tip for you speedy data entry operators . . . because it's probably quicker to enter data using the keyboard exclusively rather than going back and forth between the keyboard and the mouse, you may wish to enter data into the search form with the keyboard only.
- To demonstrate this, we'll provide most instructions using keyboard commands. However, if you really enjoy using the mouse, by all means do so.
- The training environment, with its shared training database, requires that we enter our constituent searches and data in such a way as to make our individual entry unique. The best way to do this, and still keep our theme intact, is to personalize Clark's name in such a way so that when we all do our initial search for him, we will not find a match. So, what do we do? Well, we are going to personalize Clark's name by taking his last name (Kent) and combining it with our initials (for example – abc) in such a way as to make his last name unique. Let's try it.
- Constituent search screen should look like that below, only with your initials instead of "abc." After you have pressed **Enter**, the system will search for Clark and not find him.

Enter **Kent-(your initials)/Clark** into the Name/Id column.

Search Database

Please enter criteria for database search or Perform an [Advanced Search](#).

Format for Name is Last/First Middle. Partial and blank fields, as well as Wildcards('%' and '_'), are permitted.

Name/id: <input style="width: 90%;" type="text" value="Kent-abc"/>	Similar: <input type="checkbox"/>
Constituency Type: <input style="width: 90%;" type="text" value="-- CHOOSE --"/>	Alternate Id#: <input style="width: 90%;" type="text"/>
Preferred Year: <input style="width: 90%;" type="text"/>	

Address Type: <input style="width: 90%;" type="text" value="-- CHOOSE --"/>	Preferred: <input type="checkbox"/>
Zip Code: <input style="width: 90%;" type="text"/>	State: <input style="width: 90%;" type="text" value="-- CHOOSE --"/>
Country: <input style="width: 90%;" type="text" value="-- CHOOSE --"/>	City: <input style="width: 90%;" type="text"/>

Phone Number:

Institution: <input style="width: 90%;" type="text"/>	School Pref Yr: <input style="width: 90%;" type="text"/>
School: <input style="width: 90%;" type="text" value="-- CHOOSE --"/>	Degree Year: <input style="width: 90%;" type="text"/>

Attribute:

Click **Search**.

Search Database

No match on criteria. Respecify or [Create a New Record](#)

Please enter criteria for database search or Perform an [Advanced Search](#).

Format for Name is Last/First Middle. Partial and blank fields, as well as Wildcards('%' and '_'), are permitted.

Name/id: <input style="width: 90%; border: 1px solid blue;" type="text" value="Kent-abc"/>	Similar: <input type="checkbox"/>
Constituency Type: <input style="width: 90%;" type="text" value="-- CHOOSE --"/>	Alternate Id#: <input style="width: 90%;" type="text"/>
Preferred Year: <input style="width: 90%;" type="text"/>	

Address Type: <input style="width: 90%;" type="text" value="-- CHOOSE --"/>	Preferred: <input type="checkbox"/>
Zip Code: <input style="width: 90%;" type="text"/>	State: <input style="width: 90%;" type="text" value="-- CHOOSE --"/>
Country: <input style="width: 90%;" type="text" value="-- CHOOSE --"/>	City: <input style="width: 90%;" type="text"/>

Phone Number:

Institution: <input style="width: 90%;" type="text"/>	School Pref Yr: <input style="width: 90%;" type="text"/>
School: <input style="width: 90%;" type="text" value="-- CHOOSE --"/>	Degree Year: <input style="width: 90%;" type="text"/>

Attribute:

This message indicates that a match based on the information you've entered (Name) does not exist. So it worked. GREAT! Let's move on.

Click **Create a New Record** to begin data entry.

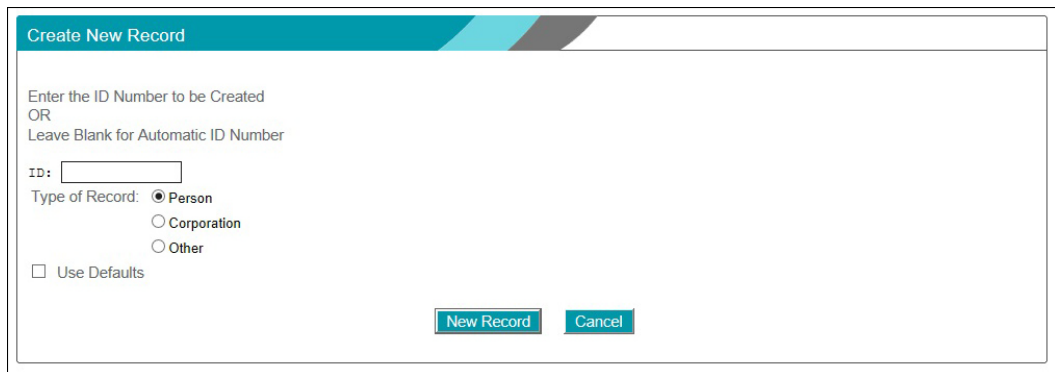
Step 2: Assign an ID and Data Entry Information

IDs

Every constituent must be assigned a unique ID. You may assign an ID based on the identification system established at your organization, or allow Abila Millennium to assign the next available consecutive ID number.

You'll remember that IDs can accommodate up to 10 characters and may consist of letters or numbers or a combination of both.

To assign an ID, type the characters into the **Create New Record** form; to let Abila Millennium assign the ID, leave the box empty.



Create New Record

Enter the ID Number to be Created
OR
Leave Blank for Automatic ID Number

ID:

Type of Record: Person
 Corporation
 Other

Use Defaults

Basic Data Input Screens

For each new constituent you must select one of the three Basic Data Table Input Screens that reflects the type of constituent: Person, Corporation or Other (Foundation).

Remember the differences between the three screens from **AS 101 Basic Navigation**? The **Individual** (Person) Basic Data Table screen contains columns

of information that are more relevant to people, for example, Marital Status, Sex, Social Security Number. The **Corporation** and **Foundation** screens provide columns with more financial and business information, such as Subsidiaries and Matching Ratios.

The radio buttons used to select the screen are mutually exclusive – you can only select one type. To indicate an input screen, click on the radio button next to the desired type of constituent.

Clark is a person, so we will leave the default of **Person** checked.

Using Defaults

You may choose to use an already established default or prototype (standard form with pre-filled information) during the initial data entry process. If you're adding several constituents with enough identical information, defaults may save time in entering data. (In most cases, however, defaults are more appropriately used with the other Abila Millennium tables and not during initial data entry.)

Please refer to **Default Forms** for further instruction on establishing defaults for data input.

Click **New Record** to begin data entry.

Data Entry Techniques

The screenshot shows a 'Basic Data' form with the following fields:

- Const. Type: -- CHOOSE --
- Birth Date: / /
- # of Children: /
- Active:
- Pref. Year:
- Parent Year:
- Grandparent Yr:
- CAE Type: -- CHOOSE --
- Source: -- CHOOSE --
- Title Bar:
- Default Acct: #
- Comment: (Large text area)
- Status: -- CHOOSE --
- Gender:
- Alternate ID:
- SS#:
- Pref. School: -- CHOOSE --
- Parent School: -- CHOOSE --
- Publish:
- Ethnic Group: -- CHOOSE --
- Birth Nation: USA

Buttons: Insert, Cancel

Before we go to Step 3, let's discuss the mechanics of data entry and define some procedures.

Data Entry Forms

Data entry forms are used to input, edit or delete information. Each Abila Millennium Table has its own unique form.

As every constituent must have a Basic Data row in order to exist on the system, Abila Millennium displays the Basic Data form first.

Navigation

To navigate through the Maintenance Screen, you may either click within the white space of any column to position your cursor for data entry, or use the Tab key to advance from column to column.

Within the form, you will notice several different types of columns. Let's define them.

Lookup Table Columns

Lookup table columns provide a pre-determined list of choices for the entered data. You must select one of the choices from the list -- the column will not accept any other values.

The advantages of lookup table columns are clear:

- A standard set of values used by the entire organization promotes a consistent quality of data.
- Guesswork on the part of the data entry operator is reduced.
- Typographical errors are eliminated.



The screenshot shows a form titled "Basic Data" with several fields. The "Const. Type:" field is highlighted with a blue border, and a dropdown menu is open, displaying a list of options: "-- CHOOSE --", Alumni, Corporation, Employee Edited, Foundation, Individual, Major Donor, Media/Public Relations, Medical Staff, Organization, Parent, Religious Denomination, and Trustee. Below this, the "Source:" field also has a dropdown menu with "-- CHOOSE --" and a downward arrow. Other fields include "Birth Date:", "# of Children:", "Active:", "Pref. Year:", "Parent Year:", "Grandparent Yr:", "CAE Type:", "Title Bar:", "Default Acct:", and "Comment:", all with empty input boxes.

Lookup Table Columns can be easily identified in the Maintenance Screens by **down arrows** appearing to the right of the column. The down arrows indicate a drop-down list is available.

In the vast majority of cases, the entries that display in Lookup Table columns are determined by your organization and are maintained by your system administrator and/or key data entry personnel. A few exceptions do exist where we strongly recommend that you use our table values based on the standard set of Abila Millennium reports that rely on certain values existing in those columns. We will point these columns out to you during the training.

Lookup Table Codes vs. Values

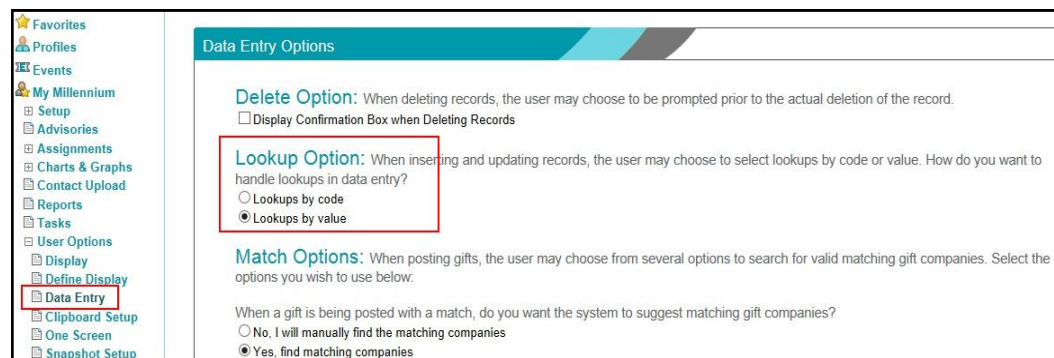
In Abila Millennium, all entries that appear in a drop-down list are stored in a **Lookup Table** with a name that relates to the column name. For example, the items that appear in the Constituency Type column are actually stored in a lookup table called **Constituent Types**.

When an entry is stored in a lookup table, thereby making it available in the drop-down list, it is given a **Code** of up to six digits (i.e. “A”). The Code is an abbreviated, unique means of identifying that entry in the listing.

When a row is stored in Abila Millennium, it is the **Code** that is actually stored in the column, not the long description or **Value** (i.e. Alumni). This conserves storage space, as some values can be quite long.

You may have maintained a coding system for your data on a previous database system. These may have been converted over to Abila Millennium as codes attached to the values in a lookup Table.

When entering data into Abila Millennium, the default or standard method of viewing table-driven columns is by value. You may change this to have the list display by code/value if you are more familiar with the coding system established at your organization.



To do this, select **My Millennium > User Options > Data Entry** in the Abila Millennium Explorer.

To change the display of the drop-down lists in table lookup columns, select either table lookups **by value** or **by code** from the table lookups section.

Selecting either type of **lookup** will affect all table-driven columns. You cannot specify which columns to affect.

Entering Data

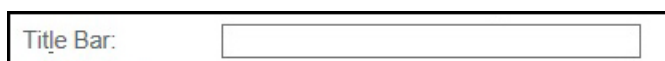
You may select an item from the drop-down list of a table lookup column in one of two ways.

- To enter data in a table lookup column using the mouse, click the down arrow to display the list. Scroll down through the list if necessary until the desired item is in view. Select it and close the list.
- To enter data in a table lookup column using the keyboard, use the Tab key to navigate to the column. When the column is highlighted (usually in blue), type the first letter of the desired item, for example, “**i**” for Individual. You may continue to type this same character to move through the list in order to select another item that begins with the same character.

As an example, type “**s**” twice to select **Single** instead of **Separated** in the Marital Status column.

As you type additional characters, the highlight will move down through the list. (You may also scroll down through the list using the down arrow key on the keyboard.) Once the desired item is highlighted, you may press Tab to select the item and advance to the next column.

Free Text Columns



Free text columns provide no restrictions in data entry – you type data directly into the column as you’d like it to appear in the display and on reports. Free text columns are distinguished from table-driven columns by the absence of the down arrow.

Entering Data

As you enter data into a free text column, your cursor will move to the right. Similar to word processing, to edit the data you may use the backspace key and retype, or use the right and left arrow keys to position your cursor within the column and use the delete or insert keys.

While free text columns do not in themselves provide any restrictions, keep in mind that you should maintain data entry standards that are in keeping with your organization’s policies about the format of the data entered into the system.

Date Columns



TIP: Clicking on the Calendar icon will produce a scrolling calendar to assist you with correct date entry.

Many of the columns in Abila Millennium are of the data type **date/time**. The text boxes for these columns are not controlled by a lookup table but neither are they free text. When data is entered for these columns, the system will examine the input and then translate and store it in the fewest possible characters. To perform that translation, the date information must conform to a form that the system will recognize. Fortunately, it recognizes nearly every imaginable form of a date. There are some rules, of course. Clicking on a date using the calendar is a quick way to enter the data in an acceptable format.

Alphabetic

The month can be the full name or the abbreviation given. Commas are optional and capitalization is ignored.

The following examples are all acceptable, however be aware that certain formats are not (for example, 96/04/15):

Apr 15, 1996*	April 15, 96	April 1996 15	Apr 96 15
15 Apr, 1996	15 April, 96	15 1996 Apr	15 1996 April
1996 APR 15	1996 APRIL 15		

* This format (3 character abbreviation for the month) is the **only one** acceptable for **Oracle** databases.

If you enter only the last two digits of a year, values less than 50 are interpreted as 20yy, and values greater than 50 are interpreted as 19yy. You must type the century if you want something other than this interpretation.

Numeric

If you wish to use numeric characters only, you must separate the numerals with either slashes (/), hyphens (-), or periods (.) as separators. Leading zeroes may be omitted.

The following examples are all acceptable:

04/15/96

04-15-1996

04.15.96

Unseparated String

Dates may be entered as numeric without separators, using four, six or eight characters. If four characters are used, they will be interpreted as a year. If six or eight digits are used, they will be interpreted as year, month, and day. Leading zeroes must be used.

The following are both acceptable entries for the date, April 15, 1996:

19960415

960415

Checkboxes

Eff. Months: <input checked="" type="checkbox"/> Jan

Some columns in Abila Millennium act as flags to indicate that a situation is or is not in effect. For example, there is a column in the Address table for each of the calendar months so that you can indicate whether the Address is or is not valid in each.

When these columns appear in the data maintenance forms, they are single characters, small squares next to their column label. They behave as toggles that can be turned on or off. When the toggle is on, a check mark appears in the box. When it is off, the box is blank.

Entering Data in a Checkbox

To place a check in a blank checkbox, tab to that box in the form. Either press the spacebar or mouse click inside the box to place a check mark.

To remove a check in a blank checkbox, tab to that box in the form. Either press the spacebar or mouse click inside the box to remove the check mark.

Money Text Boxes

A screenshot of a data entry form. It consists of a rectangular box containing the text "Amount:" on the left and an empty rectangular input field on the right.

When a column has a data type of **money**, then the system will interpret the data that is entered and format it with the dollar sign and decimal places when that data displays.

In other words, the decimal point and trailing zeroes are optional during data entry. **Commas and dollar signs are not permitted** in data entry but the system will use them appropriately when that data is displayed.

The following are acceptable forms of the amount, \$1,000.00.

1000

1000.00

ID Text Boxes

Id:	Howe/Leah
-----	-----------

OR

Id:	16384
-----	-------

When a column is used to hold the Id Number and Name of another constituent, for example in the Relations area, you may enter either the complete or partial name of the constituent (using the format, **Last Name/First Name (space) Middle Name; Suffix**) or you may enter the exact **Id Number** (you may drop any leading zeroes) for the desired constituent.

When you click on Insert, the system will search the database trying to find an exact match for the information you entered in the Id text box.

Even if there is only one match, the system will display search results with a list of constituents who match that information. The list will show the name, address, and constituent type for each match, so that you may choose the appropriate one.

If no matches are found for the information you entered, a Search Abila Millennium Database form will be presented with the information you entered, with the message that no matches were found. If you want to try again, you should enter different information in the Search form.

The following would all be valid entries to identify a constituent **John Q Public, Jr.** whose Id Number is 000123456. The consequences of each entry are also noted.

123456	Accepts the Id Number and Inserts the row
Public/J	Would return John Q. Public and also James R. Public
Public	Would return John Q. Public, and also Public Water Works.

Step 3: Input the Basic Data Table Information

After you assign an id number and determine which input screen to use, Abila Millennium will begin the data entry process by automatically displaying the Basic Data, Name and Address entry forms in succession. Once you have completed all three forms, the constituent has been entered into the system.

Before we can enter data, we need to understand what types of information will be maintained in each table.

The Basic Data Table

The Basic Data Table provides three different Maintenance Screens, depending upon the type of constituent: Individual, Corporate and Other (Foundation).

Basic Data - Individual

Basic Data

Const. Type: <input type="text" value="-- CHOOSE --"/>	Status: <input type="text" value="-- CHOOSE --"/>
Birth Date: <input type="text"/> / <input type="text"/> / <input type="text"/>	Gender: <input type="text"/>
# of Children: <input type="text"/>	Alternate ID: <input type="text"/>
Active: <input checked="" type="checkbox"/>	SS#: <input type="text"/>
Pref. Year: <input type="text"/>	Pref. School: <input type="text" value="-- CHOOSE --"/>
Parent Year: <input type="text"/>	Parent School: <input type="text" value="-- CHOOSE --"/>
Grandparent Yr: <input type="text"/>	Publish: <input type="checkbox"/>
CAE Type: <input type="text" value="-- CHOOSE --"/>	Ethnic Group: <input type="text" value="-- CHOOSE --"/>
Source: <input type="text" value="-- CHOOSE --"/>	Birth Nation: <input type="text" value="USA"/>
Title Bar: <input type="text"/>	
Default Acct: <input type="text"/>	
Comment: <div style="border: 1px solid gray; height: 100px; width: 100%;"></div>	
<input type="button" value="Insert"/> <input type="button" value="Cancel"/>	

Basic Data – Corporation and Other (Foundation)

Basic Data

Const. <u>T</u> ype: -- CHOOSE -- ▾	Industry: -- CHOOSE -- ▾
<u>P</u> arent Corp: <input style="width: 90%;" type="text"/>	<u>S</u> ubsidiaries: <input style="width: 60%;" type="text"/>
	Total <u>E</u> mp: <input style="width: 60%;" type="text"/>
<u>1</u> st Match Ratio: <input style="width: 40%;" type="text"/>	<u>1</u> st Max Match: <input style="width: 60%;" type="text"/>
<u>1</u> st Min Match: <input style="width: 60%;" type="text"/>	
<u>2</u> nd Match Ratio: <input style="width: 40%;" type="text"/>	<u>2</u> nd Max Match: <input style="width: 60%;" type="text"/>
<u>2</u> nd Min Match: <input style="width: 60%;" type="text"/>	
<u>3</u> rd Match Ratio: <input style="width: 40%;" type="text"/>	<u>3</u> rd Max Match: <input style="width: 60%;" type="text"/>
<u>3</u> rd Min Match: <input style="width: 60%;" type="text"/>	
Match <u>G</u> uideline: <div style="border: 1px solid black; height: 40px; width: 100%;"></div>	
Match <u>Q</u> uid: <input type="checkbox"/>	
Match Due Date: <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/>	
Prop. Deadlines: <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/>	
<u>C</u> AE Type: -- CHOOSE -- ▾	<u>S</u> ource: -- CHOOSE -- ▾
<u>A</u> ctive: <input type="checkbox"/>	<u>A</u> lternate ID: <input style="width: 100%;" type="text"/>
<u>T</u> itle Bar: <input style="width: 90%;" type="text"/>	
<u>D</u> efault <u>A</u> acct: <input style="width: 90%;" type="text"/> Ⓜ ✖	
<u>C</u> omment: <div style="border: 1px solid black; height: 100px; width: 100%;"></div>	
<input style="margin-right: 20px;" type="button" value="Insert"/> <input type="button" value="Cancel"/>	



NOTE: The only difference between the Corporation and Other (Foundation) Basic Data rows is the Industry row (Corporation) is replaced by the Type row (Other).

Data Entry

Prior to pressing the **Insert** button to save the row, we encourage you to point to several of the table lookup columns and drop down the list for your review. This will give you a familiarity with the types of data maintained in each of these columns.

Keep in mind that the data you're viewing is sample material. A complete review of the specific usage of the columns at your own organization is crucial prior to beginning real data entry.

Our suggestion is that you maintain your own definitions listing for each table until you get accustomed to the system. Feel free to reproduce our Column Definitions and modify them based on your needs.

Let's get busy and enter some data for Clark Kent based on the following information we've received from him:

Select or **Enter** the information below.

Const. Type:	Alumni	Marital Status:	Single
Birthday:	7/4/66	Children:	None
Gender:	Male	SS#:	987654321
Pref Year:	1988	Pref School	Arts & Sciences
Source:	Constituent	Ethnic Group:	Caucasian
Active	Checked	Birth Country:	USA
Comment	Personally knows Superman	Title Bar	VIP



NOTE: When a **new** Basic Data row is inserted, the CAE Type column will be automatically populated with the CAE type associated with the Constituent Type column.

Data Review and Edit

Prior to saving this information into the system, it is a good idea to review your input for mistakes.



TIP: If you need to change an entry in a table lookup column: click on the column's down arrow to drop down the list and re-select the correct entry. For corrections in Free Text and Other Columns: click at the end of, or within the column and use the backspace, insert or delete keys to correct the text.

Using our example, your Basic Data Table Maintenance Screen should match the following screen:

The screenshot displays the 'Basic Data' form with the following fields and values:

Const. Type:	Alumni	Status:	Single
Birth Date:	1966 / 07 / 04	Gender:	M
# of Children:	1	Alternate ID:	
Active:	<input checked="" type="checkbox"/>	SS#:	987654321
Pref. Year:	1988	Pref. School:	Arts and Sciences
Parent Year:		Parent School:	-- CHOOSE --
Grandparent Yr:		Publish:	<input type="checkbox"/>
CAE Type:	-- CHOOSE --	Ethnic Group:	Caucasian
Source:	Constituent	Birth Nation:	USA
Title Bar:	VIP		
Default Acct:			
Comment:	Personally knows Superman		

At the bottom of the form are two buttons: **Insert** and **Cancel**.

Saving your data

Once you have reviewed the data and made the appropriate corrections, save the row by clicking the **Insert** button.

The **Cancel** button will discard the row entirely without saving, and in this particular case will cancel out of entering the constituent into the system entirely.

Let's continue our task of entering Clark Kent into the system.

Click **Insert** to save the Basic Data row.

Step 4: Input the Name Table Information

Once the Basic Data Table row has been entered into the system, Abila Millennium will automatically display the Name Table maintenance form.

Name

Title: -- CHOOSE --

First Name: Clark

Last Name: Kent-abc

Middle Name:

Suffix:

Type: -- CHOOSE --

Lookup:

Override name formatting and save formatted name as:

Override salutation formatting and save salutation as:

Override combined name and save combined name as:

Override combined salutation and save combined salutation as:

Source: -- CHOOSE --

Comment:

Insert Cancel

The Name Table is used to store various ways of addressing the constituent, from the most common preferred name to nicknames, maiden names, and so on.

You may also store different salutations in the Name Table based on how members of your organization address the constituent in correspondence (for example, President's salutation, Development Director's salutation).

Complete Clark's name row as **Mr. Clark Kent**.

Select **Preferred** from the Type column drop down list and verify that the **Lookup Checkbox** is checked.



NOTE: Best Practices: The Preferred Name Type should be the first name row entered for a new constituent.

Leave all name formatting **checkboxes** unchecked.

For each Name row, you must identify whether or not this name will be available in the constituent search process by using the **Lookup?** checkbox. When checked, you will be able to find this constituent by entering the name in the **Name/Id** column of the Search box. Obviously the preferred name should be a lookup name. Maiden names should be preferred as well; nicknames and salutations probably not.

The constituent's Preferred Name will be the name that displays on the Title Bar.

Data Entry

Let's enter a complete Preferred Name for Clark that will also be available as a Name Lookup.



NOTE: For purposes of providing examples throughout this workbook, the example constituent will be "your" Clark Kent.

Make any corrections as necessary.

Name

Title:	Mr. <input type="text"/>	Middle Name:	<input type="text"/>
First Name:	Clark <input type="text"/>	Suffix:	<input type="text"/>
Last Name:	Kent-abc <input type="text"/>	Lookup:	<input checked="" type="checkbox"/>
Type:	Preferred <input type="text"/>		
<input type="checkbox"/> Override name formatting and save formatted name as:			
<input type="text"/>			
<input type="checkbox"/> Override salutation formatting and save salutation as:			
<input type="text"/>			
<input type="checkbox"/> Override combined name and save combined name as:			
<input type="text"/>			
<input type="checkbox"/> Override combined salutation and save combined salutation as:			
<input type="text"/>			
Source:	-- CHOOSE -- <input type="text"/>		
Comment:	<div style="border: 1px solid gray; height: 80px; width: 100%;"></div>		
<input type="button" value="Insert"/>		<input type="button" value="Cancel"/>	

Click **Insert** to save the Name row.

Step 5: Input the Address Table Information

The final step to creating a constituent is the completion of an address row. Abila Millennium automatically moves from the Name Table to the Address Table during initial data entry.



NOTE: You may press **Cancel** out of the Address maintenance screen if you do not have the constituent's address when you initially enter them into the system.

Address

Line 1:	<input type="text"/>	Locator:	<input type="text" value="-- CHOOSE --"/>
Line 2:	<input type="text"/>	Type:	<input type="text" value="-- CHOOSE --"/>
Line 3:	<input type="text"/>	Source:	<input type="text"/>
City:	<input type="text"/>	Place:	<input type="text"/>
Zip:	<input type="text"/>		
Country:	<input type="text"/>		
Phone #:	<input type="text"/>	Phone Restrict:	<input type="text"/>
FAX #:	<input type="text"/>	FAX Restrict:	<input type="text"/>
Alt #:	<input type="text"/>	Alt# Restrict:	<input type="text"/>
Start:	<input type="text"/>	Stop:	<input type="text"/>

Eff. Months: Uncheck

<input checked="" type="checkbox"/> Jan	<input checked="" type="checkbox"/> Feb	<input checked="" type="checkbox"/> Mar	<input checked="" type="checkbox"/> Apr	<input checked="" type="checkbox"/> May	<input checked="" type="checkbox"/> Jun
<input checked="" type="checkbox"/> Jul	<input checked="" type="checkbox"/> Aug	<input checked="" type="checkbox"/> Sep	<input checked="" type="checkbox"/> Oct	<input checked="" type="checkbox"/> Nov	<input checked="" type="checkbox"/> Dec

Utilization:

<input type="checkbox"/> Preferred	<input type="checkbox"/> Annual Fund	<input type="checkbox"/> Athletics	<input type="checkbox"/> Alumni Magazine
<input type="checkbox"/> Solicitation	<input type="checkbox"/> Mailcode 6	<input type="checkbox"/> Mailcode 7	<input type="checkbox"/> Mailcode 8
<input type="checkbox"/> Mailcode 9	<input type="checkbox"/> Mailcode 10	<input type="checkbox"/> Mailcode 11	<input type="checkbox"/> Mailcode 12
<input type="checkbox"/> Mailcode 13	<input type="checkbox"/> Mailcode 14	<input type="checkbox"/> Mailcode 15	<input type="checkbox"/> Mailcode 16
<input type="checkbox"/> Mailcode 17	<input type="checkbox"/> Mailcode 18	<input type="checkbox"/> Mailcode 19	<input type="checkbox"/> Mailcode 20

Comment:

Insert
Insert + Phone
Cancel

The Address Table maintains separate rows for each of the different addresses your constituent may have. Examples of the different types of Address rows would be: home, business, vacation, college.

By using the **Preferred** checkbox you may indicate if an address is the preferred mailing address for the constituent.

Preferred Addresses



NOTE: Each constituent should have only one preferred address on the system. If you have more than one Address row marked as preferred, you may get duplicate rows when producing mailings, lists and other reports that contain address information.

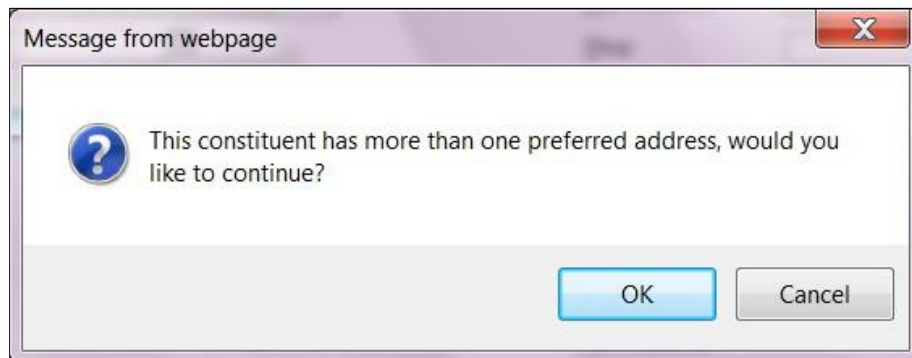
The only exception to this rule applies to seasonal or vacation addresses. If you are maintaining seasonal addresses for your constituents it is possible to have more than one preferred address as long as the Effective Months do not overlap.

A toggle button is available to either check or uncheck all effective months at one time.



NOTE: Best Practices: We recommend that you enter the constituent's Preferred Address as the first address row during the initial data entry process. In fact, Abila Millennium will warn you if you attempt to insert the first address row and do not check the Preferred Address box.

A similar message will appear if you try to enter more than one preferred address.



You may maintain phone and FAX numbers, along with any restrictions (unpublished, do not give out), with each Address row.

Phone and FAX Numbers entered into an Address row should be associated with the Type of address, for example, home phone/FAX number on a Home (Type) or Address row, business phone/FAX number on a Business (Type) Address row.

Other phone numbers that are not associated with a particular address are maintained in the Phone Numbers Table which will be discussed in a later section. Examples of phone numbers that should be stored in the Phone Numbers Table would be cellular phones and pagers. Internet and email addresses may be stored in Phone Numbers but are usually stored in the Internet Address Table.

Data Entry

Clark has provided us with his good, home address, which he has also indicated as being the preferred address for mailing purposes.

Home Address:	123 Metropolis Avenue, Williamsburg, VA 23188
Home Phone:	(757) 555-0911 (unlisted)

Since we're unaware of any vacation or summer homes, we will indicate that Clark lives at this address all year long.

Clark has requested that we do not give out his home address information so we'll attach a Comment to that effect.

Enter Clark's address information in the Address Table form.

Verify that the checkboxes for **Effective Months** and the **Preferred Utilization** are checked.

Click **Insert** to add the Address row.

Address

Line 1: <input type="text" value="123 Metropolis Avenue"/> Line 2: <input type="text"/> Line 3: <input type="text"/> City: <input type="text" value="Williamsburg"/> Zip: <input type="text" value="23188"/> Country: <input type="text"/> Phone #: <input type="text" value="(757)555-0911"/> FAX #: <input type="text"/> Alt #: <input type="text"/> Start: <input type="text"/>	Locator: <input type="text" value="Good"/> Type: <input type="text" value="Home"/> Source: <input type="text" value="-- CHOOSE --"/> Place: <input type="text" value="Virginia"/> Phone Restrict: <input type="text" value="Unlisted"/> FAX Restrict: <input type="text"/> Alt# Restrict: <input type="text"/> Stop: <input type="text"/>
---	--

Eff. Months: Uncheck

<input checked="" type="checkbox"/> Jan	<input checked="" type="checkbox"/> Feb	<input checked="" type="checkbox"/> Mar	<input checked="" type="checkbox"/> Apr	<input checked="" type="checkbox"/> May	<input checked="" type="checkbox"/> Jun
<input checked="" type="checkbox"/> Jul	<input checked="" type="checkbox"/> Aug	<input checked="" type="checkbox"/> Sep	<input checked="" type="checkbox"/> Oct	<input checked="" type="checkbox"/> Nov	<input checked="" type="checkbox"/> Dec

Utilization:

<input checked="" type="checkbox"/> Preferred	<input type="checkbox"/> Annual Fund	<input type="checkbox"/> Athletics	<input type="checkbox"/> Alumni Magazine
<input type="checkbox"/> Solicitation	<input type="checkbox"/> Mailcode 6	<input type="checkbox"/> Mailcode 7	<input type="checkbox"/> Mailcode 8
<input type="checkbox"/> Mailcode 9	<input type="checkbox"/> Mailcode 10	<input type="checkbox"/> Mailcode 11	<input type="checkbox"/> Mailcode 12
<input type="checkbox"/> Mailcode 13	<input type="checkbox"/> Mailcode 14	<input type="checkbox"/> Mailcode 15	<input type="checkbox"/> Mailcode 16
<input type="checkbox"/> Mailcode 17	<input type="checkbox"/> Mailcode 18	<input type="checkbox"/> Mailcode 19	<input type="checkbox"/> Mailcode 20

Comment:

Clark has requested that we do not give out his home information

Insert
Insert + Phone
Cancel

TIP: You do not need to enter "Williamsburg, VA", but just enter "23188" as the zip code. Abila Millennium will take care of the rest.

Congratulations! You've just entered your first constituent from scratch!

Verifying Your Data

Depending upon how you have customized your display screen, you will see different results following the creation of your constituent.

In order to verify our data, let's switch to **Display All** and ensure that all table displays are shown in the **Long** format.

Select Abila Millennium Explorer > Display All.

Select the **Long Display** for the **Basic Data**, **Name** and **Address** tables.

Now that we have a complete view, verify your data comparing it to the screen on the following page. How does it look?

If you notice any errors, don't worry. We will discuss how to edit and delete rows in a later section. For now, just take a moment to scroll through the data and admire your hard work.

000000279 - Mr. Clark Kent-abc - 1988 - Alumni
VIP Reports Print

Basic Data

Const. Type:	Alumni	Status:	Single
Birth Date:	1966/07/04	Gender:	M
# of Children:		Alternate ID:	
Active:	Yes	SS#:	###-##-4321
Pref. Year:	1988	Pref. School:	Arts and Sciences
Parent Year:		Parent School:	
Grandparent Yr:		Publish:	No
CAE Type:		Ethnic Group:	Caucasian
Source:	Constituent	Birth Nation:	USA
Title Bar:	VIP	Created:	Apr 06, 2014
Default Acct:			

Personally knows Superman Apr 06, 2014 David

Citizenship

Name

Mr. Clark Kent-abc	Preferred	Lookup:	Yes
Type:	Mr. Kent-abc		
Salutation:	Mr. Clark Kent-abc		
Comb. Name:	Mr. Kent-abc		
Comb. Salutat:			
Source:			Apr 06, 2014 David

Address

123 Metropolis Avenue	Locator:	Good
	Type:	Home
	Source:	
Williamsburg, VA 23188	County:	James City
Country:	District:	
Region:	Territory:	Mid Atlantic
Zone:	Phone Restrict:	Unlisted
Phone #:	FAX Restrict:	
(757)555-0911	Alt# Restrict:	
FAX #:	Stop:	
Alt #:	Apr 06, 2014 David	
Start:		
Time Zone:		
ET		
Eff. Months:		
ALL		
Utilization:		
Preferred		

Clark has requested that we do not give out his home information
[Map It](#)

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Student Curriculum

39

In the Address row shown above, there is a **Map It** hyperlink. When in Long display, clicking on the hyperlink will open a new browser window to the **MapQuest** Website. If/when the address is located (the example above is not an actual address), a map will be displayed showing that location.

Notice the following:

- **VIP** appears on the **Title Bar** under Clark’s name.
- Your ID and today’s date (the **Creation** or **Modification Date**) appear in the lower right corner of each row.
- Your comments attached to the **Basic Data** and **Address** rows.
- The **City** and **State** are filled in.

Now let’s enter a Corporate constituent so that you can get a feel for another type of Basic Data maintenance screen.

Our research has provided the following information about a new Corporate constituent, The Daily Planet.

Const. Type:	Corporation	Industry:	Publishing
Total # of Subsidiaries:	10	Total # of Employees:	1,000
Gift Matching Ratios:	2.0 (to 1) on gifts from \$1.00 to \$1,000.00 1.0 (to 1) on gifts from \$1,000.00 to \$10,000.00 0.5 (to1) on gifts from \$10,000.00 to \$50,000.00	CAE Category:	Corporation
Comment:	Ranked first in circulation.	Address:	1 Main Street Williamsburg, VA 23188
Phone:	(757) 555-8000	FAX:	(757) 555-8001

Some of this can be a bit confusing so please refer to the following screen shot to make sure you are entering the information correctly.

When entering corporations into Abila Millennium, the entire corporation name, except for “The” or “A”, should be placed in the “Last name” column. When a

company name begins with “The”, “A”, or another article, this part of the name should be entered in the **Title** column in the Name Table Form. This will enable the corporation to be searched for, retrieved, and displayed under the first character of the name, (for example, “D” for Daily Planet). So when you are searching for a corporation or foundation, do not include “The” or “A” in the Name/ID box.

Don’t forget – your Daily Planet will be the Daily Planet–abc. We will be doing this with every new constituent.

Enter **The Daily Planet-(your initials)** as a new constituent. Don’t forget to select **Corporation** for the Basic Data input screen.

Basic Data

Const. Type: Corporation Industry: Publishing

Parent Corp:

Subsidiaries: 10

Total Emp: 1000

1st Match Ratio: 2

1st Min Match: 1

1st Max Match: 1000

2nd Match Ratio: 1

2nd Min Match: 1001

2nd Max Match: 10000

3rd Match Ratio: .5

3rd Min Match: 10001

3rd Max Match: 50000

Match Guideline:

Match Quid:

Match Due Date: / / / /

Prop. Deadlines: / / / /

CAE Type: Corporation Source: -- CHOOSE --

Active: Alternate ID:

Title Bar:

Default Acct: P #

Comment: Ranked first in circulation

Insert Cancel

When entering the matching gift information, Abila Millennium uses the customary ratio of *n to 1*. For example, if a company will match the first \$1,000 of an employee’s gift at 2 to 1, you will enter that as 2.0 in the First Match Ratio

column, 1.00 in the 1st Min Match column and 1000.00 in the 1st Max Match column.

When finished, your display for The Daily Planet should look somewhat like this except yours display will be **The Daily Planet-your initials**.

000000280 - The Daily Planet-abc - Corporation
Reports Print

Basic Data
⊗

Const. Type:	Corporation	Industry:	Publishing
Parent Corp:		Subsidiaries:	10
Match Through:		Total Emp:	1,000
CorrectGM Corporation Detail:		Alum. Emp:	0
Known Subsid:		1st Max Match:	\$1,000
Known Emp:	0	2nd Max Match:	\$10,000
1st Match Ratio:	2.00	3rd Max Match:	\$50,000
1st Min Match:	\$1		
2nd Match Ratio:	1.00		
2nd Min Match:	\$1,001		
3rd Match Ratio:	0.5		
3rd Min Match:	\$10,001		
Match Guideline:			
Match Quid:	No		
Match Due Date:	////		
Prop. Deadlines:	////		
CAE Type:	Corporation	Source:	
Active:	Yes	Alternate ID:	
Title Bar:		Created:	Apr 06, 2014
Default Acct:			

Ranked first in circulation

Apr 06, 2014 David

Citizenship
⊗

Name
⊗

The Daily Planet-abc			
Type:	Preferred	Lookup:	Yes
Salutation:	The Daily Planet-abc		
Comb. Name:	The Daily Planet-abc		
Comb. Salutat:	The Daily Planet-abc		
Source:			Apr 06, 2014 David

Address
⊗

1 Main Street			
Williamsburg, VA 23188		Locator:	Good Business
Country:	USA	Type:	
Region:	Virginia Peninsula	Source:	
Zone:		County:	James City
Phone #:	(757)555-8000	District:	
FAX #:	(757)555-8001	Territory:	Mid Atlantic
Alt #:		Phone Restrict:	
Start:		FAX Restrict:	
Time Zone:	ET	Alt# Restrict:	
Eff. Months:	ALL	Stop:	
Utilization:	Preferred		Apr 06, 2014 David
Map It			

Phone Numbers
⊗

Internet Address
⊗

Notes

Adding Constituent Data

Once you've entered a new constituent into your system you will need to add additional information (employment, relationships, gifts, etc.) to the other Abila Millennium tables.

Once Abila Millennium ends the automatic display of maintenance screens, you determine which tables you would like to populate for your constituent. Do you have additional job information? Education information? Or no information at all?

We will begin by adding some additional information into the system for our original constituent, Clark Kent.

Adding Rows to a Table

Display the Table

To add rows to any Abila Millennium table, access the appropriate table in your display.

You may do this in several ways:

- If you are not concerned with your particular Defined Profile, you may select the appropriate table from the Abila Millennium Explorer. This will cause just that table to be included in the display, temporarily removing all other tables.
- You may also include the new table in your **Defined Profile** if you feel it would be helpful to continue viewing this table on a regular basis.
- You may simply switch to **Display All** to view all tables at the same time.

To simplify matters, we will use the first method and select the appropriate table from the Abila Millennium Explorer to display only that one table.

Along with Clark Kent's other information, we also have his business address that we need to enter into the system.

Perform a search for **Clark Kent**.

Select the **Address Table** from the Abila Millennium Explorer to display the Address Table only.

Three Methods to Insert New Information

There are three ways to get the insert screen for each table in Abila Millennium.

- Move your cursor over the table title. This will produce the context menu for that table. Selecting **Insert** will produce a blank form for your input.



- Move your cursor over any Address row context menu icon. Select **Insert**.

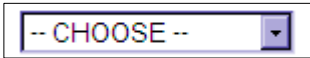


- With your cursor in the Address table on a constituent record, hit the **Shift-i** hot key combination or just **i**.

You will now see the Address Insert form.

The screenshot shows the 'Address' insert form with the following fields and options:

- Line 1: [Text Field]
- Line 2: [Text Field]
- Line 3: [Text Field]
- City: [Text Field]
- Zip: [Text Field]
- Country: USA [Dropdown]
- Phone #: [Text Field]
- FAX #: [Text Field]
- Alt #: [Text Field]
- Start: [Text Field]
- Locator: -- CHOOSE -- [Dropdown]
- Type: -- CHOOSE -- [Dropdown]
- Source: -- CHOOSE -- [Dropdown]
- Place: -- CHOOSE -- [Dropdown]
- Phone Restrict: -- CHOOSE -- [Dropdown]
- FAX Restrict: -- CHOOSE -- [Dropdown]
- Alt# Restrict: -- CHOOSE -- [Dropdown]
- Stop: [Text Field]
- Eff. Months: **Uncheck**
 - Jan
 - Feb
 - Mar
 - Apr
 - May
 - Jun
 - Jul
 - Aug
 - Sep
 - Oct
 - Nov
 - Dec
- Utilization:
 - Preferred
 - Solicitation
 - Mailcode 9
 - Mailcode 13
 - Mailcode 17
 - Annual Fund
 - Mailcode 6
 - Mailcode 10
 - Mailcode 14
 - Mailcode 18
 - Athletics
 - Mailcode 7
 - Mailcode 11
 - Mailcode 15
 - Mailcode 19
 - Alumni Magazine
 - Mailcode 8
 - Mailcode 12
 - Mailcode 16
 - Mailcode 20
- Comment: [Text Area]
- Buttons: Insert, Insert + Phone, Cancel

When using a blank form, you may see  displaying in several table lookup columns. This is because a “blank entry” does not exist in that table. The absence of a blank entry in a lookup table effectively forces some entry to be selected for that column.

Our recommendation for data entry operators is to establish default entry forms for each table. These default forms should include your organization’s standard entries for each column that you would use when normally entering records. Default forms are discussed in a later section of this workbook.

OK, let’s start putting this into practice.

Clark's "good" (but not preferred) business address is: 1 Main Street Williamsburg, VA 23188. (Remember you don't need to enter the City and State.) His business phone number is (757) 555-8888.

Enter Clark Kent's business address.

The new business Address row should now be displayed with the home Address row.

Notice the line separating the two rows.

Address			
123 Metropolis Avenue Williamsburg, VA 23188 Phone #: (757)555-0911	Locator:	Good	
	Type:	Home	
1 Main Street Williamsburg, VA 23188 Phone #: (757)555-8888	Locator:	Good	
	Type:	Business	

Clark has indicated that most of his friends and colleagues refer to him as "CK".

Let's enter this as a nickname row in Clark's Name Table. This will not be available as a Name Lookup.

Select the **Name Table**.

Insert a new **Name** row.

Enter "**CK**" into the **First Name** column (nicknames are usually stored here).

Select **Nickname** in the **Type** column.

Ensure that the **Lookup** checkbox is unchecked.

Click **Insert** to save the row.

Name

Title: -- CHOOSE -- ▾

First Name: CK

Last Name:

Type: Nickname ▾

Override name formatting and save formatted name as:

Override salutation formatting and save salutation as:

Override combined name and save combined name as:

Override combined salutation and save combined salutation as:

Source: -- CHOOSE -- ▾

Comment:

Lookup:

Middle Name:

Suffix:

Adding Rows to Other Abila Millennium Tables

Until now, we've been working with just three tables – Basic Data, Name and Address. As this is Biographical Data Entry (Basic Data through Death), we need to learn how to add rows into the other tables.

Each of the remaining topics of this section will introduce a new Abila Millennium table, provide column definitions, and supply exercises in data entry.

Let's go.

The Employment Table

Data Entry

Before entering an employment row for a constituent, you should ask yourself the following questions:

- Is the company also a constituent on my database?
- If not, should it be?

Generally speaking, if any of the following conditions exist, you should establish the company as a constituent on the system:

- The company is a matching gift company.
- The company is, or will be, solicited for a corporate donation.
- The company is a prominent member of the community and employs several constituents on your system.

Entering a Constituent Company Employment Row

If you decide that the company named in an Employment row should be established as a constituent on the system, enter the company as a constituent **prior to** creating the Employment row for the individual.

Once the company is established, you may enter the company's ID or name (as indicated in the Last Name column of the company's Preferred Name row) into the **Firm** column of the Employment row.

The **Status** column is an important indicator for everyone interested in employment information.

If the constituent is currently working at this job, ensure that the Status column contains **Active**.

The **Status** column, along with the **Begin and End Dates**, should be maintained and edited to reflect your constituent's change in employment status: for example, "Retired", "No Longer At This Position".

We all know that Clark Kent works for The Daily Planet. The Daily Planet is already a constituent on our system, so we will go ahead and enter the Employment row. Clark has been working as a Reporter for The Daily Planet since August 1, 1990.

Because The Daily Planet is a constituent, we may enter The Planet's ID number in the Firm column. Do you remember what it is?

Display the **Employment Table**.

Click **Insert** to enter a new row.

Enter your Daily Planet's ID into the Firm column or enter **Daily Planet-your initials**. (Type it carefully; we'll explain why in a moment.)

Complete the rest of the Employment Form and click **Insert** to enter the row.

The screenshot shows the 'Employment' form with the following fields and values:

- Firm:** Daily Planet-abc
- Division:** (empty)
- Title:** Reporter
- Occupation:** Reporter
- Industry:** -- CHOOSE --
- Descriptor 1:** -- CHOOSE --
- Descriptor 2:** -- CHOOSE --
- Descriptor 3:** -- CHOOSE --
- Status:** Active
- Comment:** (empty text area)
- Begin:** 8.1.2011
- End:** (empty)
- Salary:** -- CHOOSE --
- Source:** -- CHOOSE --

At the bottom of the form are two buttons: **Insert** and **Cancel**.

Once you enter a new Employment row, Abila Millennium executes a search using the Name or ID entered into the Firm column. If the lookup procedure cannot find a match, a message to that effect will display. If you have correctly identified the company's ID or name, the Employment row will be entered into the system.

We will discuss what to do if you encounter this message in the next section:
Entering a Non-Constituent Company Employment Row.

Notice how The Daily Planet appears in the display. The **hypertext link** indicates a link between this row and another row has been established.

Employment			
Firm:	Daily Planet-abc		
Division:			
Title:	Reporter		
Occupation:	Reporter	Matching Co:	Yes
Industry:	Publishing	Begin:	Aug 01, 2011
Descriptor 1:		End:	
Descriptor 2:		Salary:	
Descriptor 3:		Source:	
Status:	Active	Apr 06, 2014	Class

Identifying a constituent company in the Firm column of an Employment row automatically creates a link between the Employment row and the company's Basic Data row.

As a result of this link, the **Industry** column is automatically filled in with the information from the Industry column in the Company's Basic Data row.

You'll remember from **AS 101 Basic Navigation** that you may use this hypertext link to jump from row to row. Let's jump to The Daily Planet's Basic Data row to illustrate another point.

Click on the **Daily Planet hypertext** link.

There is an added benefit to establishing the company as a constituent on your system – once the link based on an Employment row is created, Abila Millennium will automatically update certain columns in the company's Basic Data Table row.

0000000280 - The Daily Planet-abc - Corporation Reports Print

Basic Data

Const. Type:	Corporation	Industry:	Publishing
Parent Corp:		Subsidiaries:	10
Match Through:		Total Emp:	1,000
CorrectGM Corporation Detail:		Alum. Emp:	0
Known Subsid:		1st Max Match:	\$1,000
Known Emp:	1	2nd Max Match:	\$10,000
1st Match Ratio:	2.00	3rd Max Match:	\$50,000
1st Min Match:	\$1		
2nd Match Ratio:	1.00		
2nd Min Match:	\$1,001		
3rd Match Ratio:	0.5		
3rd Min Match:	\$10,001		
Match Guideline:			
Match Quid:	No		
Match Due Date:	///		
Prop. Deadlines:	///		
CAE Type:	Corporation	Source:	
Active:	Yes	Alternate ID:	
Title Bar:		Created:	Apr 06, 2014
Default Acct:			

Ranked first in circulation

Apr 06, 2014 Class

Citizenship

The **Known Employees** and **Alumni Employees** columns will automatically update to reflect the number of Employment rows that point to this company.

Constituents must have a **CAE Category** of Alumni to be included in the Alumni Employees count.

The Known Subsidiaries column is updated based on the existence of Parent Corporation/Subsidiary relationships and will be discussed later.

Return to Clark Kent's **Employment** row.

Entering a Non-Constituent Company Employment Row

Smaller Mom and Pop companies need not be entered as constituents, but can still be identified as the employer (Firm) in an Employment row.

Once you click **OK** to enter the Employment row, the constituent search for the company will produce this message:

Employer Id Search

No match on criteria; Re-Specify or [Enter Non-Constituent Employer](#)

Please enter criteria for database search.
Format for Name is Last/First Middle. Partial and blank fields, as well as Wildcards('%' and '_'), are permitted.

Name / Id:

City: State:

Zip Code: Similar

This is a normal message for this operation, and we are well aware that the company does not exist on the system. Let's see how it works as we perform another exercise.

We're not sure why, but our boss has indicated that he would like us to maintain a row of Clark's college job as a busboy at the Speeding Bullet Café. Clark worked at this job from 1986 to 1988. We definitely do not need to enter the Speeding Bullet Café as a constituent.

Insert a new **Employment** row.

Enter the Employment information as indicated.

Click **Insert** to enter the row (to perform the company search).

Employment	
Firm:	Speeding Bullet Cafe
Division:	
Title:	Busboy
Occupation:	-- CHOOSE --
Industry:	-- CHOOSE --
Begin:	Jan 01, 1986
Descriptor 1:	-- CHOOSE --
End:	Dec 31, 1986
Descriptor 2:	-- CHOOSE --
Salary:	-- CHOOSE --
Descriptor 3:	-- CHOOSE --
Source:	-- CHOOSE --
Status:	No Longer at this Position
Comment:	
<input type="button" value="Insert"/> <input type="button" value="Cancel"/>	

If no match is found with the Employer name, you will see the following message:

Employer Id Search	
No match on criteria; Re-Specify or Enter Non-Constituent Employer	
Please enter criteria for database search. Format for Name is Last/First Middle. Partial and blank fields, as well as Wildcards('%' and '_'), are permitted.	
Name / Id:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
Zip Code:	<input type="text"/>
<input type="checkbox"/> Similar	
<input type="button" value="Search"/> <input type="button" value="Cancel"/>	

If the company name or id is correct, and you are aware that the company will not be found on the system, click on the **Enter Non-Constituent Employer** hypertext link. You will be taken to the **Employment** row showing the non-constituent Company name already inserted using the name information from the Search form.

Firm:	Speeding Bullet Cafe	Matching Co:	No
Division:		Begin:	Jan 01, 1986
Title:	Busboy	End:	Dec 31, 1986
Occupation:		Salary:	
Industry:		Source:	
Descriptor 1:			
Descriptor 2:			
Descriptor 3:			
Status:	No Longer at this Position		Apr 06, 2014 Class

Note that **Speeding Bullet Café** is **not** a hypertext link, indicating that it is not a constituent on the system.



NOTE: Some discussion regarding the guidelines for identifying companies as constituent vs. non-constituent should occur at your organization so that all data entry personnel are aware of the criteria.

The Education Table

Education

<p><i>Institution Name:</i> <input style="width: 90%;" type="text"/> P *</p> <p>School: <input type="text" value="-- CHOOSE --"/></p> <p>Campus: <input type="text" value="-- CHOOSE --"/></p> <p>Department: <input type="text" value="-- CHOOSE --"/></p> <p>Concentration 1: <input type="text" value="-- CHOOSE --"/></p> <p>Concentration 3: <input type="text" value="-- CHOOSE --"/></p> <p>Degree: <input type="text" value="-- CHOOSE --"/></p> <p>Source: <input type="text" value="-- CHOOSE --"/></p> <p>Comment: <div style="border: 1px solid gray; height: 100px; width: 95%;"></div> </p>	<p>Degree Date: <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/></p> <p>Preferred Year: <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/></p> <p>Attend Start Yr: <input style="width: 40px;" type="text"/></p> <p>Attend Stop Yr: <input style="width: 40px;" type="text"/></p> <p>Concentration 2: <input type="text" value="-- CHOOSE --"/></p> <p>Concentration 4: <input type="text" value="-- CHOOSE --"/></p>
---	---

Data Entry

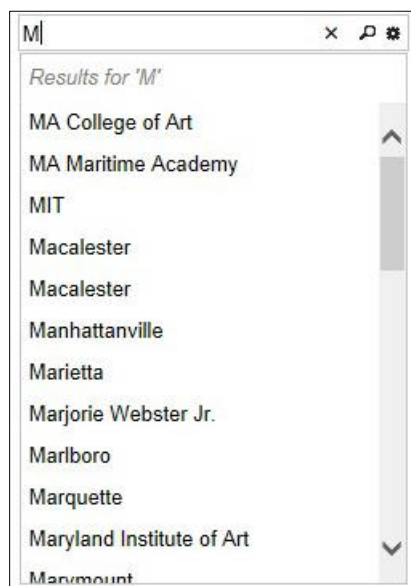
The Education Table maintains information about your constituents' school or academic attendance. If your organization is a school or university, you will be using this table quite a bit. If not, you may not use the Education Table much at all, or at the most, just for your major donors.

“Institution Name” is in italics – this denotes a column based on a value-based (super) lookup table. It is a lookup column, however no drop-down menu will

appear as it can be a very large lookup table (generally based on the CEEB code list that includes all colleges and universities).

If you type in an entry that is not in the lookup table a search window asking you to confirm a close match that Abila Millennium has found or retry your search (see below). As it is a lookup column, your entry must exactly match the entry in the table. Please note: It is case sensitive.

This is an example of the choices that appear when an exact match is not found.



There are two date columns worth mentioning -- **Degree Date** and **Preferred Year**. There is a distinction between Preferred Year in Education and Preferred Year in Basic Data.

The **Preferred Year** column in the Basic Data table is the overall year the constituent prefers to be associated with your institution (assuming he or she is an Alumnus/a). For example, a constituent may have received both a Bachelor's and a Master's Degree from your institution but prefers to be associated with his undergraduate class for reunion purposes.

The **Degree Date** columns in the Education Table are associated with individual school rows and reflect the actual date on which the degree was conferred. The Preferred Year may differ from the Degree Date if the constituent actually received his/her degree later in the year from the rest of his class, but still would like to be associated with his planned graduation date.

The **Concentration 1, 2, 3 and 4** columns may be used to record the major and minor, or both majors for double-major students. If you are using these columns, you should standardize their use within your institution and publicize the criteria for entering data.

Since Clark is an Alumnus of Abila Millennium University, we should probably include a row in the Education Table. He attended the College of Arts and Sciences from 1984 to 1988 and graduated with a Bachelor of Arts in Journalism (Concentration 1) on May 15 (also his preferred date).

Display the **Education** Table and enter Clark’s Education information.

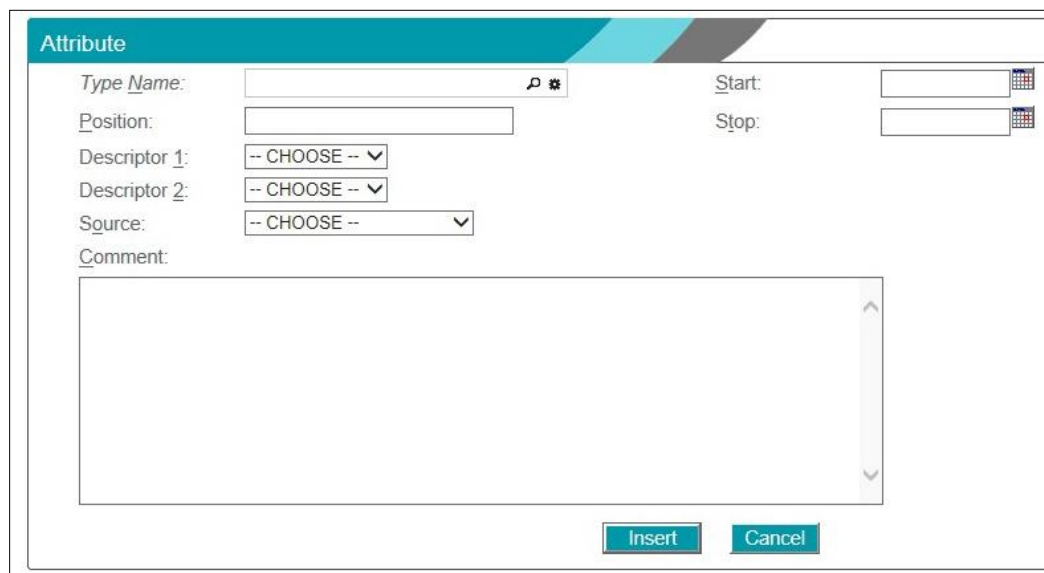
Education

Institution Name: Millennium University	Degree Date: 1988 / 05 / 14
School: Arts and Sciences	Preferred Year: 1988 / 05 / 14
Campus: -- CHOOSE --	Attend Start Yr: 1984
Department: -- CHOOSE --	Attend Stop Yr: 1988
Concentration 1: Journalism	Concentration 2: -- CHOOSE --
Concentration 3: -- CHOOSE --	Concentration 4: -- CHOOSE --
Degree: Bachelor of Art	
Source: -- CHOOSE --	
Comment:	
<input type="button" value="Insert"/> <input type="button" value="Cancel"/>	

Your screen should closely match the following:

Education			
Institution Name:	Millennium University	Degree Date:	1988/05/14
School:	Arts and Sciences	Preferred Date:	1988/05/14
Campus:		Years Attended:	1984-1988
Department:		Concentration 2:	
Concentration 1:	Journalism	Concentration 4:	
Concentration 3:			
Degree:	Bachelor of Art		
Source:			Apr 06, 2014 Class

The Attributes Table



The screenshot shows a web-based form titled "Attribute". The form contains the following fields:

- Type Name:** A text input field with a search icon and a refresh icon.
- Start:** A date selection field with a calendar icon.
- Position:** A text input field.
- Stop:** A date selection field with a calendar icon.
- Descriptor 1:** A dropdown menu with "-- CHOOSE --" selected.
- Descriptor 2:** A dropdown menu with "-- CHOOSE --" selected.
- Source:** A dropdown menu with "-- CHOOSE --" selected.
- Comment:** A large text area with a vertical scrollbar.

At the bottom right of the form are two buttons: "Insert" and "Cancel".

Data Entry

The Attributes Table is used to store miscellaneous and specific pieces of information about your constituents. Sports and leisure activities, board memberships, or philanthropic interests are all examples of Attribute information.

Your Attribute Table will contain rows that are very specific to your organization's interests and operations. Probably everyone at your site will have a say in what types of information should be included in the Attributes Table based on their individual needs for flagging constituents.

Attribute Type is also a value-based (super) lookup table. Just like **Institutions** in the Education table, **Attributes** can also be a very large table. The search window will appear if an attribute type is not entered exactly as it appears in the lookup table.

Attributes may be assigned to **Groups** for organizational and reporting purposes. For example, Basketball, Hockey and Football attributes may all be assigned to the Group Sports. In this way, similar Attributes can be listed together on the display or in reports.

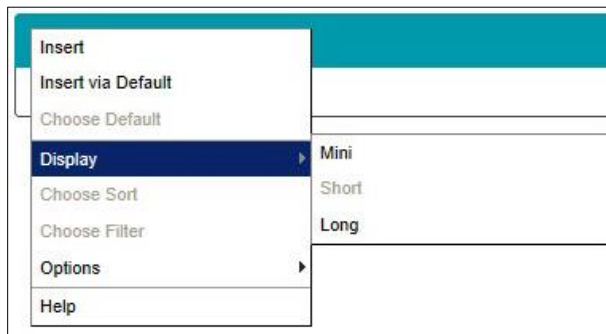
Groups are established and assigned to Attributes using look up table maintenance, which is usually handled by the system administrator or selected data entry personnel. Contact your system administrator if you would like more information about assigning groups to Attributes.

During data entry, you do not manually enter an Attribute's group. This is automatically entered by the system based on information in Attributes Types and Table Groups.

The Descriptor 1 and 2 columns are completely user-defined. You may use them in any way you wish to further categorize your Attributes.

Since Attribute listings can get quite long, in most cases you probably will want to view this table in **Short Display**. As a refresher, let's change our view of the Attributes Table only to Short Display.

Hold your cursor over the **Attributes** title and select **Short Display** from the context menu.



We have several pieces of information about Clark Kent that do not appear to fit anywhere else in Abila Millennium's Tables. We have established Attributes for these items and need to enter these as Attribute rows for Clark. The information is as follows:

During his college years at MU, Clark was Captain of the Football Team during the 1987-88 season and at some point (date unknown) was a member of the High Flyers Aviation Club. As an Alumnus, Clark is a member of the Major Gifts Committee and is a frequent contributor to Scholarships.

Display the **Attributes** Table

Access the context menu.



Click **Insert**.

Enter the four separate attributes from the example above.

The screenshot shows a form titled "Attribute" with the following fields and values:

- Type Name:** Football
- Position:** Captain
- Start:** Aug 14, 1987
- Stop:** Jan 15, 1988
- Descriptor 1:** -- CHOOSE --
- Descriptor 2:** -- CHOOSE --
- Source:** -- CHOOSE --
- Comment:** (Empty text area)

Buttons at the bottom right: **Insert** and **Cancel**.

Type Name is a value-based (super) lookup table. (This is indicated by the italicized font.) If you type the first letter of the attribute name, you will be presented with a list of attributes starting with that letter. You can then choose the correct attribute for insertion.

The screenshot shows a list view titled "Attribute" with the following items:

- Football**
Group: Sports
- High Flyers Aviation Club**
Group: Undergraduate Activities
- Major Gifts Committee**
Group:

Notice that the Groups have been automatically entered where appropriate.

Now that's more like it.

The Correspondence Table

The screenshot shows a web form titled "Correspondence". At the top, there are two radio buttons: "Constituent" (selected) and "Non-Constituent". Below this are several input fields and dropdown menus: "Corresp. Name" (dropdown with "-- CHOOSE --"), "Type" (dropdown with "-- CHOOSE --"), "Email" (text input), "Phone" (text input), "Corres. Method" (dropdown with "-- CHOOSE --"), "Date Sent" (calendar icon), "Department" (dropdown with "-- CHOOSE --"), "Sent By" (text input), "Response" (dropdown with "-- CHOOSE --"), "Clicked?" (checkbox), "Response Date" (calendar icon), "Bounced?" (checkbox), "Resp. Method" (dropdown with "-- CHOOSE --"), "Soft Bounce?" (checkbox), "Source" (dropdown with "-- CHOOSE --"), and "Comment" (large text area). At the bottom right, there are two buttons: "Insert" and "Cancel".

Data Entry

The Correspondence table is used to track details concerning any correspondence either from your organization to the constituent, or vice versa. Correspondence may be written, email, or verbal (telephone call, face-to-face conversation.)

Correspondence rows may be used in two ways:

Rows in this table may behave as **primary (independent) rows** that display only with the Correspondence table. In this situation, the row would be used to store information about any kind of communication between the constituent and the organization. This might be letters of solicitation, invitations, newsletters, renewal notices, blast emails, telephone calls, or any other communication.

Rows in this table may also behave as **secondary rows attached to a specific row in the Transaction table**. In this situation, the Correspondence row is intended to store information about the acknowledgement letter that was sent in response to that giving transaction though you might also use it for other

correspondence. This secondary row is displayed with the Transaction table only, and then only when the Long display is activated.

Another example of Correspondence as a secondary row would be linked rows in Events – perhaps recording invitations sent and responses received.

Correspondence may be categorized by **Type** (solicitation, invitation, or acknowledgement) and by **Name** if it is a standard communication that will be sent to many constituents (such as Annual Mailing or Spring Ball).

The ID, name and department of the person that sent the correspondence to the constituent may also be maintained.

Individual Correspondence rows may be created using standard Abila Millennium input techniques, or they may also be created for many constituents at once using the **Correspondence Utility**. By this technique, a standard work file is created that identifies either a set of transaction rows, or a set of constituents. If transactions are identified in the work file, then the Correspondence rows are attached to them. If any other table is used as the key table, then the Correspondence rows are usually created as primary rows in that table. You may also link Correspondence rows to a specific Event or Activity.

When a constituent responds in some way to the correspondence, the specific response (**Yes, No, Maybe**), response date and method (**phone call, letter**) may also be reflected in the Correspondence Row.

Let's get some practice entering a Correspondence row.

On 3/3/14, Michael James sent out an AF Solicitation (Type) mailing that we refer to as the Leadership Letters (Name). We need to record the fact that Clark Kent received that mailing in the Correspondence Table. On 3/20/14, Clark replied by phone that he will make a contribution (that would be Accepted.)

Enter the Correspondence row for Clark Kent based on the above information.

Remember to type **James/M** in the **Sent by:** column. Abila Millennium will automatically do the linking to Michael James.

Correspondence

Constituent Non-Constituent

Corresp. Name: Type:

Email:

Phone:

Corres. Method:

Date Sent: Department:

Sent By:

Response: Clicked?:

Response Date: Bounced?:

Resp. Method: Soft Bounce?:

Source:

Comment:

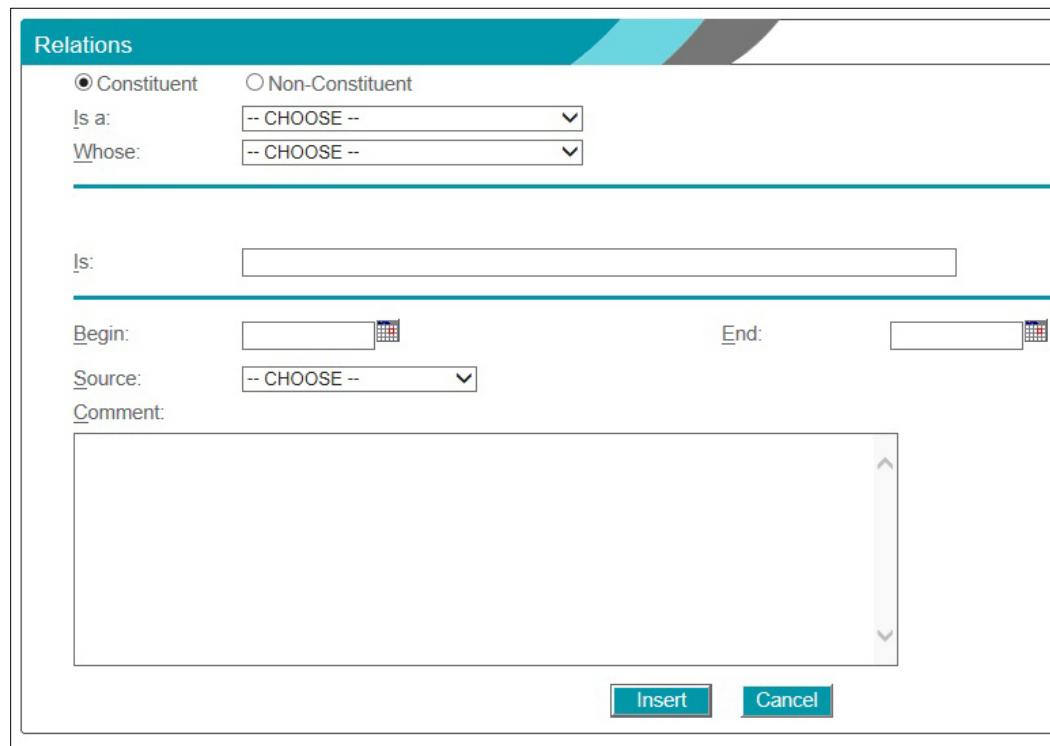
Correspondence

Corresp. Name:	Leadership Letters	Type:	AF Solicitation
Email:			
Phone:			
Corres. Method:			
Date Sent:	Mar 03, 2014	Department:	
Sent By:	<u>Mrs. Michaele James</u>		
Response:	Accepted	Clicked?:	No
Response Date:	Mar 20, 2014	Bounced?:	No
Resp. Method:	Phone Call	Soft Bounce?:	No
Source:		Change Info:	Apr 06, 2014 Class

The Relationships Table

Relationships are next. Relationships are dynamic and extremely important in keeping abreast of your constituents' many and varied connections. Strong fundraising programs depend on this information. So, let's check them out.

Display the **Relationships** Table and access a blank **Maintenance** form.



The screenshot shows a web-based form titled "Relations". At the top, there are two radio buttons: "Constituent" (selected) and "Non-Constituent". Below this are two dropdown menus: "Is a:" and "Whose:", both currently set to "-- CHOOSE --". A horizontal line separates these from the "Is:" text input field. Another horizontal line follows. Below that are "Begin:" and "End:" date pickers, each with a calendar icon. Underneath is a "Source:" dropdown menu, also set to "-- CHOOSE --". At the bottom is a large text area for "Comment:". At the very bottom of the form are two buttons: "Insert" and "Cancel".

Data Entry

Relationship rows provide a means of establishing a network of affiliations for your constituents. You may maintain family relationships, professional relationships or solicitation-based relationships (for Campaign Team Leaders, Workers, Prospect Managers, etc.)

For any type of relationship, you may establish a **Begin Date** and an **End Date**, although this is most commonly used for professional and solicitation relationships. As with Attributes, Relationship rows can also be assigned to a group. For example, Family, for all family relationships – great for reporting.

Constituent Relationships

The first step in entering a Relationship row is to identify the type of relationship: Constituent or Non-Constituent.

Constituent Relationships are those between two constituents in your database. Once a relationship row is entered into one constituent's table, the corresponding relationship is automatically entered into the other constituent's table. Because of this feature, it doesn't matter on which constituent you choose to enter the relationship information.

At the same time, a **hypertext link** is established between the two constituents that allows you to easily maneuver between them as you search for information.

For Abila Millennium University's 2009 Annual Fund Campaign (which runs from 7/1/08 to 6/30/09), Clark Kent is a Prospect Manager for Jeff Shure (ID #1). Let's enter the relationship in Abila Millennium.



NOTE: You will notice an Employee/Employer relationship in Clark's Relationship Table. This was automatically entered when we created his Employment row. We'll discuss this feature later in the section.

The relationship is entered in the same way it is read on the display -- from the top (Title Bar) down.

To enter a row, you must translate the English version of the relationship into Abila Millennium-ese.

The **Is a** column identifies what the constituent (whose record you are currently viewing) is.

*Clark Kent is a **Prospect Manager** ...*

Select **Prospect Manager** from the **Is a** drop-down list.

The **Whose** column identifies what the **other** constituent is.

*... whose **Prospect** ...*



NOTE: The site administrator can determine which relationship pairs are available in the **Whose** column. The list is based on what was chosen in the **Is A** column. For example a Spouse – Spouse relationship is allowed, but Spouse – Company is not allowed and thus will not be available in the drop- down list.

Relations

Constituent Non-Constituent

Is a:

Whose:

Is:

Begin: End:

Source:

Comment:

Select **Prospect** from the **Whose** drop-down list.

The **Is** column identifies the Name or ID of the other constituent. The Name must be in the format Last/First Middle; Suffix and may be a partial name (last name only, last name plus first initial, etc.). If you use the ID, you can drop the leading zeroes.

... is Shure/Jeff.

Type **Shure/Jeff** (or just his ID # **1**) into the **Is** column.

Add a **Begin Date** of **Jul 1, 20113** and an **End Date** of **Jun 30, 2015**.

Click **Insert** to add the Relationship row.

Relations

Constituent Non-Constituent

Is a:

Whose:

Is:

Begin: End:

Source:

Comment:

The new Relationship row reads as follows: Clark Kent is a **Prospect Manager** whose **Prospect** is **Mr. Jeff R. Shure**.

Also, Jeff's name is created as a hypertext link. Let's use that link to jump over to Jeff's Relationship display to see how it looks over there.

Click on **Mr. Jeff R. Shure**.

000000279 - Mr. Clark Kent-abc - 1988 - Alumni
VIP

Relations

Is a:	Employee		
Whose:	Employer		
Is:	The Daily Planet-abc - Corporation	End:	
Begin:			
Group:	Employment		
Source:			Apr 06, 2014 Class

Is a:	Prospect Manager		
Whose:	Prospect		
Is:	Mr. Jeff R. Shure - 1985 - Alumni	End:	Jun 30, 2014
Begin:	Jul 01, 2013		
Group:	Prospect Tracking		
Source:			Apr 06, 2014 Class

The reverse relationship has been automatically entered for Jeff. Jeff Shure is a **Prospect Manager** whose **Prospect** is **Mr. Clark Kent**. Pretty neat, huh?

Click on **Mr. Clark Kent** to return to his Relationship Table.

000000001 - Mr. Jeff R. Shure - 1985 - Alumni			
Very Important Donor			
Group:	Family		
Source:		Mar 11, 2002	aaa
<hr/>			
Is a:	Prospect		
Whose:	Prospect Manager		
Is:	Mr. Clark Kent-abc - 1988 - Alumni		
Begin:	Jul 01, 2013	End:	Jun 30, 2014
Group:	Prospect Tracking		
Source:		Apr 06, 2014	Class

Linked Contact Information

Jeff Shure's relationship with Clark is a good opportunity to demonstrate the linked contact information functionality of Abila Millennium.

On Jeff R. Shure's relationship row, move your cursor over the **Edit** button to access the context menu.

Select **Link > Contact Info**.

Insert	
Insert via Default	▶
Update/Delete	
Link	▶ Attachment
Link to Existing	▶ Contact Info
Unlink	▶ Relationship to Spouse
Display	▶ Relationship to Other
Options	▶
Help	

Contact Info

Override salutation and save salutation as:

Job Title:

Override default address and save as:

Line 1:

Line 2:

Line 3:

City: Place:

Zip:

Country:

Phone:

Fax Number:

Email:

Flag 1: Flag 2:

Flag 3: Flag 4:

Flag 5: Flag 6:

Flag 7: Flag 8:

Flag 9: Flag 10:

Comment:

When you link contact information on a constituent relationship, Abila Millennium does several things automatically.

- The address will be pulled from the preferred address of the constituent (Jeff Shure's preferred address).
- The salutation will automatically be formatted from the Title and Last Name of the constituent's (Jeff Shure's) preferred name. Any of this information can be overridden by checking the override checkbox. Should Jeff's name change for some reason in the preferred Name row, his name will be automatically changed in the Contact Information row also.

Note: Flags 1 through 10 are available for your organization to use as needed.

Click **Insert**.

Is a:	Prospect Manager		
Whose:	Prospect		
Is:	Mr. Jeff R. Shure - 1985 - Alumni		
Begin:	Jul 01, 2013	End:	Jun 30, 2014
Group:	Prospect Tracking		
Source:		Apr 06, 2014 Class	
Salutation:	Mr. Shure		
Job Title:			
Williamsburg, VA 23188			
Phone:		Fax Number:	
Email:			

Non-Constituent Relationships

Non-Constituent Relationships define a relationship between your constituent and someone that does not have their own identity (an Abila Millennium ID#) in your system.

In a non-constituent relationship, the name and other general information about the person identified is stored within the relationship row. Hypertext links are not established.

There are two ways to insert a non-constituent relationship in Abila Millennium.

Option 1

If you began creating the relationship from the Constituent Relation Insert form, a Relation ID Search will be conducted to find the appropriate constituent match. If no match is found, you will see the following message:

Relation Id Search

No match on criteria; Re-Specify or [Enter Non-Constituent Relation](#)

Please enter criteria for database search.
Format for Name is Last/First Middle. Partial and blank fields, as well as Wildcards('%' and '_'), are permitted.

Name / Id:

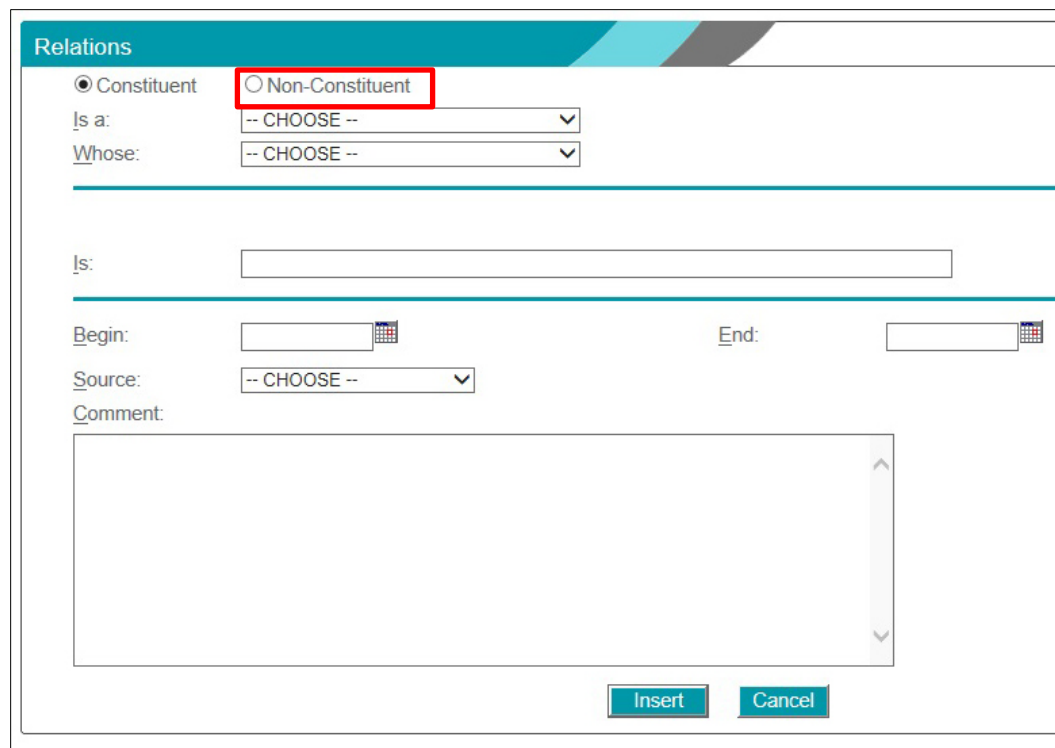
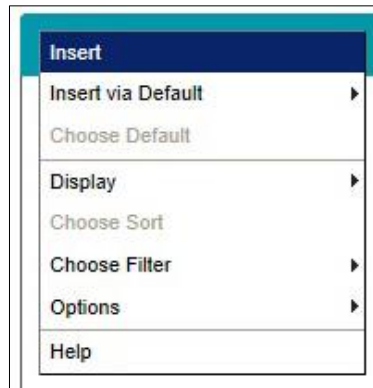
City: State:

Zip Code: Similar

Click the **Enter Non-Constituent Relation** hyperlink.

Option 2

Click **Insert** on the Relationships title bar.

A screenshot of a dialog box titled "Relations". At the top, there are two radio buttons: "Constituent" (selected) and "Non-Constituent" (highlighted with a red box). Below these are two dropdown menus labeled "Is a:" and "Whose:", both containing "-- CHOOSE --". A horizontal line separates these from the "Is:" text label and an empty text input field. Another horizontal line follows. Below that are "Begin:" and "End:" labels with date pickers. Underneath is a "Source:" dropdown menu with "-- CHOOSE --". At the bottom is a large "Comment:" text area with a vertical scrollbar. At the very bottom are "Insert" and "Cancel" buttons.

Select the **Non-Constituent** button.

Once you select **Non-Constituent** the form changes. It now includes several new columns. These columns store some basic information about your non-constituent: Name, Birthday, etc.

Clark Kent's parents (Martha and Jonathan) are well known in the community. We should keep a record of their names along with Clark's other relationships. Let's enter Martha's information first.

Insert a new **non-constituent** relationship.

Select **Son** from the **Is a** drop-down list and **Mother** from the **Whose** drop-down list.

In the **Title** column enter **Mrs.**

Enter **Martha** into the **First Name** column and **Kent** into the **Last Name** column.

Select **F** from the **Gender** column.

Click **Insert** to enter the row.

Now look at the screen:

Is a:	Son	
Whose:	Mother	
Is:	Mrs. Martha Kent	
Child:	No	Birthdate:
Gender:	F	Status:
Begin:		End:
Group:	Family	
Source:		Apr 06, 2014 Class

Note that Martha’s name is not a hypertext link -- she’s not a constituent so there is no place to jump.

Enter Clark’s **Son/Father** relationship with **Mr. Jonathan Kent**.

We realize that Martha and Jonathan are not Clark’s natural parents, so you may wish to attach a Comment of “Adopted” to these rows. An alternative would be to add “Adopted Son”, “Adopted Mother” and “Adopted Father” to your Relationship Types table and use those instead.

Oops – He Was a Constituent After All!

If, during data entry or some time later, you realize that the person you entered was a constituent rather than a non-constituent, simply select the context menu of the row you want to change.

Relations		
Insert	Son	
Insert via Default	Father	
Update/Delete	Mr. Jonathan Clark	
Link	No	Birthdate:
Link to Existing	M	Status:
Unlink		End:
Display	Family	
Options		Apr 06, 2014 Class
Help		

Select **Update/Delete**.



Select the **Constituent** button at the top of the form.

Enter the name using the usual convention of last name/first name.

Click **Update**.

You will get a **Relationship ID Search Results** list to verify which Jonathan Kent is actually Clark's father. Just confirm your choice by selecting the correct constituent.

Spouse/Spouse Relationships

The Spouse/Spouse Relationship is one of the most important relationships in Abila Millennium (as in real life.). There are several ways of identifying a constituent's spouse, depending upon whether or not the spouse is a constituent, and also on the practices you have established at your organization.



NOTE: The following discussions involving the spouse relationship also apply to the **Life Partner** relationship which is used to link two constituents that are unmarried, for example, roommates, same-sex relationships.

Constituent Spouse Relationships

Constituent Spouse Relationships are created between two individuals that exist as separate entities on the system. The Spouse/Spouse relationship links these two constituents and provides the maximum benefit of maintaining a wealth of information about each individual.

Once a Spouse/Spouse relationship is created, several automatic functions are activated:

- The **Spouse** button will become active, providing a quick way of jumping from one spouse to another.
- Both constituents' Marital Status columns in Basic Data will be changed to **Married**.
- When producing mailings or reports through the Reporter, the **Combine Name** and **Remove Spouse** options can produce one "Mr. and Mrs." row, combining both constituents.

When creating a Spouse/Spouse relationship between two constituents that already exist on your system, you will need to think about editing the female's preferred name. If the female is retaining her maiden name, no editing will be necessary. Otherwise, you will need to edit the female's **Preferred Name** row to change her existing **Preferred Name** to **Maiden Name**, and then add a new **Preferred (Married) Name** row.

Well, it's about time, don't you think? Clark gets married to Lois Lane.

Lois is not a constituent on our system (and we definitely want her to be). Let's start with that first. Here is Lois' information. We'll start by entering her as a Single person first for demonstration purposes.

Address	105 Lovelorn Place Williamsburg, VA 23188 757-555-1212	Date of Birth	3/3/68
Const. Type & CAE	Individual	Gender	Female
Marital Status	Single		

Enter Lois Lane as a constituent. Don't forget her name is **Lane-your initials**.

0000000281 - Ms. Lois Lane-abc - Individual			
Basic Data			
Const. Type:	Individual	Status:	Single
Birth Date:	1968/03/03	Gender:	F
# of Children:		Alternate ID:	
Active:	Yes	SS#:	
Pref. Year:		Pref. School:	
Parent Year:		Parent School:	
Grandparent Yr:		Publish:	No
CAE Type:		Ethnic Group:	
Source:		Birth Nation:	USA
Title Bar:		Created:	Apr 06, 2014
Default Acct:			
Apr 06, 2014 Class			
Citizenship			
Name			
Ms. Lois Lane-abc			
Type:	Preferred	Lookup:	Yes
Address			
105 Lovelorn Place		Locator:	Good
Williamsburg, VA 23188		Type:	Home
Phone #:	(757)555-1212		

Now let's get these two married. In Abila Millennium-ese that means that Clark Kent is a **Spouse / Whose Spouse is** Lane/Lois.

They got married on January 1, 1997 (the Begin Date of the Relationship.)

Enter the Spouse/Spouse relationship in Lois' Relationship Table. (It will not matter if you are in Lois' side or Clark's side.)

Relations

Constituent Non-Constituent

Is a:

Whose:

Is:

Begin: End:

Source:

Comment:

Use the new hyperlink to quickly navigate to Clark Kent.

Once the relationship is entered, notice that **Spouse** now appears as a selection on the Profiles menu bar.

Press **Spouse** on the Profiles menu bar.

0000000281 - Ms. Lois Lane-abc - Individual

Relations

Is a: Spouse

Whose: Spouse

Is: Mr. Clark Kent-abc - 1988 - Alumni

Begin: Jan 01, 1997 End:

Group: Family

Source: Apr 06, 2014 Class

While we're here, let's check out Lois' Marital Status.

Display the Basic Data Table.

0000000281 - Ms. Lois Lane-abc - Individual			
Basic Data			
Const. Type:	Individual	Status:	Married
Birth Date:	1968/03/03	Gender:	F
# of Children:		Alternate ID:	
Active:	Yes	SS#:	
Pref. Year:		Pref. School:	
Parent Year:		Parent School:	
Grandparent Yr:		Publish:	No
CAE Type:		Ethnic Group:	
Source:		Birth Nation:	USA
Title Bar:		Created:	Apr 06, 2014
Default Acct:			
Apr 06, 2014 Class			

There's your proof; it's official.

Clark's Marital Status column has been updated as well.

Lois Lane has spent many years establishing a name for herself in the business. She definitely will keep her maiden name as her preferred name.



NOTE: Remember that if the female will be assuming her husband's name, you must edit her Preferred Name and change the Type column to **Maiden**, then enter a new Name row (such as Mrs. Lois Kent) with a Type of **Preferred**.

Non-Constituent Spouse Relationships

Non-Constituent Spouse Relationships are used to identify the name of a constituent's spouse who is not a separate entity (the person does not have their own ID#) on the system.

In many cases, you will not want to maintain the spouse as a constituent but still would like a record of their name. Creating a non-constituent relationship does not provide the same benefits, but offers a means to this end.

In addition to entering a Non-Constituent Relationship to row the spouse's name, you may choose to enter a new Name row into the constituent's table with a Type of **Spouse**. This provides the greatest flexibility for reports that include spouse names.

You may also choose to flag the spouse Name row as a **lookup** name, if you wish to access the constituent's rows by looking up the spouse's name.

Combined Spouse Rows

Some organizations track the information for a married couple as one constituent in the Abila Millennium database. A **Basic Data** Gender of **C** indicates this.

000010339 - Mr. and Mrs. Grady C. Hermann - Individual			
Basic Data			
Const. Type:	Individual	Status:	
Birth Date:	//	Gender:	C
# of Children:		Alternate ID:	I00010339

Combined Spouse Rows are stored as one “Mr. and Mrs.” row on the system with no unique identity for either of the spouses. When creating Name rows in this case, you may use the standard Name Types, **Husband Preferred** and **Wife Preferred** to track the names of the two people involved.

If those two name types are used for a constituent with a Gender of **C**, and if no Name row already exists with a Type of **Preferred**, then the system will automatically use the information from the two individual Names to create the Preferred Name row for the couple.

Name			
Mr. Grady C. Hermann	Husband Preferred	Lookup:	Yes
Type:	Mr. Hermann		
Salutation:	Mr. and Mrs. Grady C. Hermann		
Comb. Name:	Mr. and Mrs. Hermann		
Comb. Salutat:		Source:	Jan 04, 2005 sa
Source:			
Mrs. Stella C. Hermann	Wife Preferred	Lookup:	Yes
Type:	Mrs. Hermann		
Salutation:	Mr. and Mrs. Grady C. Hermann		
Comb. Name:	Mr. and Mrs. Hermann		
Comb. Salutat:		Source:	Jan 04, 2005 sa
Source:			
Mr. and Mrs. Grady C. Hermann	Preferred	Lookup:	Yes
Type:	Mr. and Mrs. Hermann		
Salutation:	Mr. and Mrs. Grady C. Hermann		
Comb. Name:	Mr. and Mrs. Hermann		
Comb. Salutat:		Source:	Jan 04, 2005 sa
Source:			



NOTE: Once the Preferred Name row has been generated in this way, it must be updated manually. It will not automatically be edited if the Husband Preferred or Wife Preferred Name rows are edited

Employer/Employee Relationships

The Employer/Employee relationship is automatically created by Abila Millennium when an Employment row is entered that identifies a constituent company.

If the Employment row is changed from **Active** to another Status, the Employer/Employee relationship automatically changes to **Former Employer/Former Employee**. You should also edit the Relationship row to assign an **End Date** to the relationship.

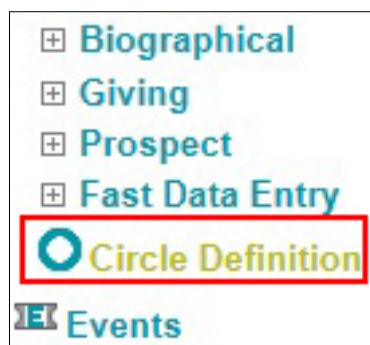
For non-constituent employers, you may add a Non-Constituent Relationship row with the name of the company entered into the Last Name column. In this situation, once a constituent is no longer employed at the company, you must manually change the Relationship to **Former**.

The Circle Table

Circles adds a way to track relationships between a constituent and a group of constituents. For example, Circles can be created and maintained for constituents who are members of the same family, work for the same company or share a special interest.

Circles are another area Abila Millennium and there are two components – the Circle and the Circle Member. A Circle can be owned by a constituent and several circle display options can be set, including the option to display a Circle and all of its active members on a constituent's Relation Tree, as well as an option to display a summary of Circle Member giving when displaying the Circle Definition.

To define a Circle, click on **Profiles > Circle Definition**.



The following screen appears.

Circle Search

**Please enter criteria for the Circle Search.
Enter a complete Circle Code or partial Circle Name. Wildcards('%' and '_') may be used.**

Circle Code / Name:

Include Inactive Circles in the Search.

Enter **shure** as the Circle Code.

As a Circle Definition has not been set, we will create one.

Click on **Create a Circle Definition**.

Enter the data as outlined in the below screenshot and click **Insert**.

Circle Definition

Name:	<input style="width: 95%;" type="text" value="Shure Family"/>		
Code:	<input style="width: 80%;" type="text" value="shure"/>	Circle Type:	<input style="width: 80%;" type="text" value="Family"/>
Circle Owner:	<input style="width: 95%;" type="text" value="Shure/Jeff"/>	Active:	<input checked="" type="checkbox"/>
Financials:	<input type="checkbox"/>	Relation Tree:	<input checked="" type="checkbox"/>
Access:	<input style="width: 95%;" type="text" value="ABCDEFGHJKLMNOPQRS"/>	Access:	<input style="width: 95%;" type="text" value="abcdefghijklmnopqrstuvwxyz"/>
Maintenance:	<input style="width: 95%;" type="text" value="ABCDEFGHJKLMNOPQRS"/>	Maintenance:	<input style="width: 95%;" type="text" value="abcdefghijklmnopqrstuvwxyz"/>
Comment:	<div style="border: 1px solid gray; padding: 2px; min-height: 30px;"><p>Shure Family members - immediate and extended</p></div>		
<input style="background-color: #00A09A; color: white; padding: 2px 10px;" type="button" value="Insert"/> <input style="background-color: #00A09A; color: white; padding: 2px 10px;" type="button" value="Cancel"/>			

Your screen should look like this.

Circle Definition			
Name:	Shure Family	Circle Type:	Family
Code:	shure	Active:	Yes
Circle Owner:	Mr. Jeff R. Shure		
Circle Members			

To insert the Circle relationship:

From the **Circle Members'** header context menu

Insert Circle Member
Insert Circle Member via Default
Choose Default
Display ▶
Choose Sort
Choose Filter
Options ▶
Help

Select **Insert Circle Member**.

Enter the data as outlined below and click **Insert**.

Circle Member			
<u>I</u> d:	Shure/Jeff		
<u>P</u> osition:	Father ▼	<u>A</u> ctive?:	<input checked="" type="checkbox"/>
<u>J</u> oin Date:	Mar 24, 2014	<u>E</u> nd Date:	<input type="text"/>
<u>S</u> ource:	Alumni Society ▼		
<u>C</u> omment:	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>		
	<input type="button" value="Insert"/>	<input type="button" value="Cancel"/>	

Jeff Shure is now a member of the Shure Family Circle.

Circle Definition			
Name:	Shure Family	Circle Type:	Family
Code:	shure	Active:	Yes
Circle Owner:	Mr. Jeff R. Shure		

Circle Members			
Mr. Jeff R. Shure	Position:	Father	Active?:
	Join Date:	Mar 24, 2014	Yes
	Source:	Alumni Society	End Date:
	Comment:		Change Info:
			Apr 06, 2014 Class

Now enter **Kathy Shure** as a member of the Circle.

Circle Members			
Mr. Jeff R. Shure	Position:	Father	Active?:
	Join Date:	Mar 24, 2014	Yes
	Source:	Alumni Society	End Date:
	Comment:		Change Info:
			Apr 06, 2014 Class
Mrs. Kathy F. Shure	Position:	Mother	Active?:
	Join Date:	Mar 24, 2014	Yes
	Source:		End Date:
	Comment:		Change Info:
			Apr 06, 2014 Class

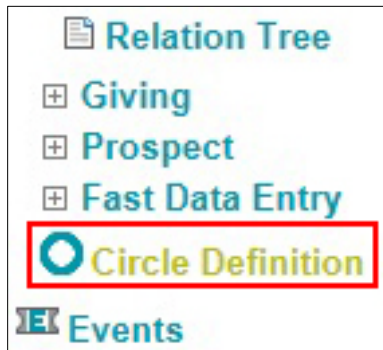
Click on the **Circle Owner** in Jeff's record and the system jumps to Jeff's Circles.

Circle			
Circle:	Shure Family		
Type:	Family		
Position:	Father	Active?:	Yes
Join Date:	Mar 24, 2014	End Date:	
Source:	Alumni Society	Change Info:	Apr 06, 2014 Class
Comment:			

Circle and the Relation Tree

The Circle feature allows for the Circle to be included in the Relation Tree table. An individual constituent's Relation Tree display will include a graphic representation of his/her circle memberships. To flag the Circle to display on Relation Trees, the Relation Tree radio button must be activated during the Circle insert.

Click on Circle Definition **and Create a New Circle.**



Enter **Baseball** as the Circle Code.

Click **Create a Circle Definition.**

Enter **Baseball** as the Circle Name and **Base** as the Code.

Activate the **Relation Tree** check box.

 A screenshot of the 'Circle Definition' form. The form has a teal header with the title 'Circle Definition'. It contains several input fields and checkboxes:

- Name:** A text box containing 'Baseball'.
- Code:** A text box containing 'base'.
- Circle Type:** A dropdown menu showing '-- CHOOSE --'.
- Circle Owner:** An empty text box.
- Financials:** A checkbox that is unchecked.
- Active:** A checkbox that is checked.
- Relation Tree:** A checkbox that is checked and highlighted with a red rectangular box.
- Access:** A text box containing 'ABCDEFGHJKLMNOPSRS'.
- Access:** A text box containing 'abcdefghijklmnopqrstuvwxy'.
- Maintenance:** A text box containing 'ABCDEFGHJKLMNOPSRS'.
- Maintenance:** A text box containing 'abcdefghijklmnopqrstuvwxy'.
- Comment:** A large empty text area.

 At the bottom of the form are two buttons: 'Insert' and 'Cancel'.

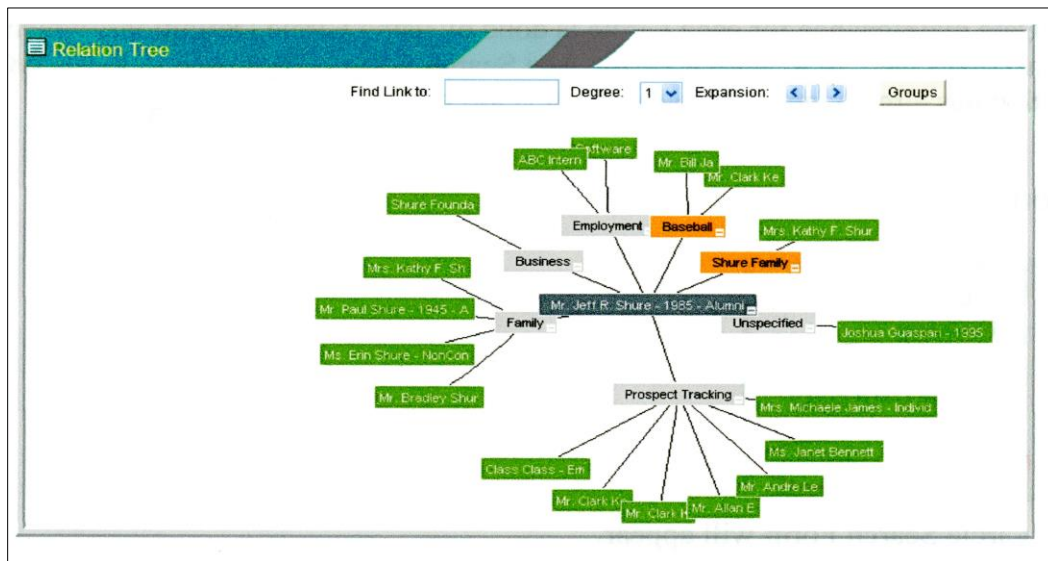
Click **Insert**.

Enter **Jeff Shure, Clark Kent**, and **Bill James** as Circle Members.

Circle Members			
Mr. Bill James	Member	Active?:	Yes
Mr. Clark Kent-abc	Member	Active?:	Yes
Mr. Jeff R. Shure	Member	Active?:	Yes

Click the **hyperlink** to Jeff Shure’s record.

Click **Relation Tree** in the Abila Millennium Explorer.

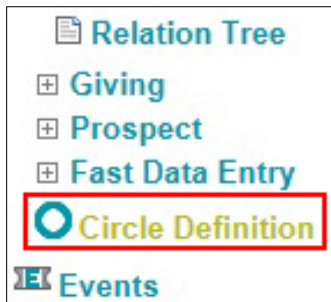


You now have a view of Jeff’s Relationships and Circles. Circles appear in orange.

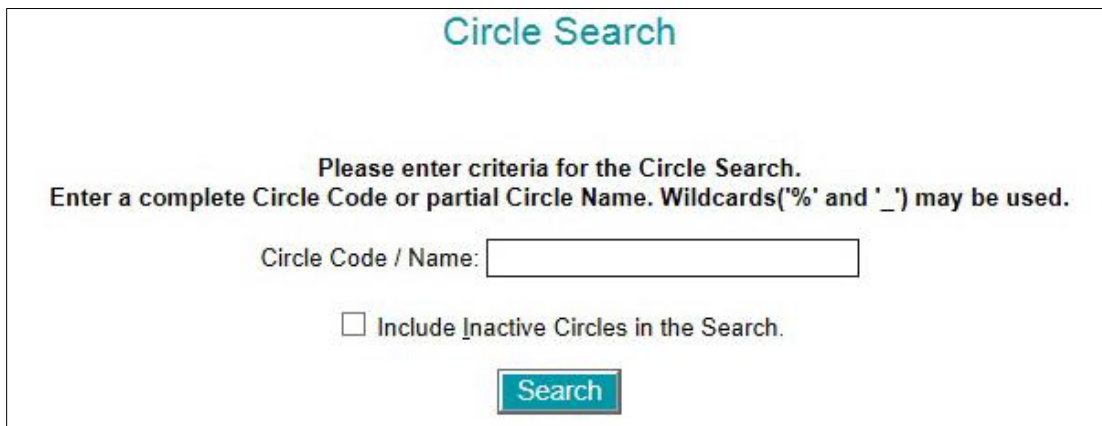
Circles Data Editing/Updating

Data maintenance for each Circle is done by using **Circle Definitions**, which accesses the **Circle Search** Form. The Search Form is then used to locate a Circle that has already been created or to develop a new Circle.

Click **Circle Definition**.



The Circle Search Form will appear.

A screenshot of the 'Circle Search' form. The title 'Circle Search' is at the top. Below it, the text reads: 'Please enter criteria for the Circle Search. Enter a complete Circle Code or partial Circle Name. Wildcards('%' and '_') may be used.' There is a text input field labeled 'Circle Code / Name:'. Below the input field is a checkbox labeled 'Include Inactive Circles in the Search.' At the bottom of the form is a blue 'Search' button.

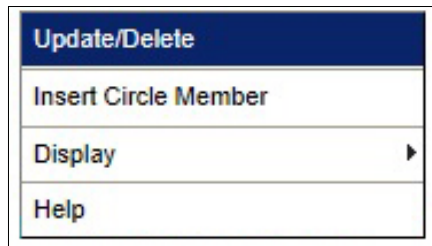
Enter **shure** in the Circle Code/Name area.

Click **Search**. This presents you with the Circle Definition list.

Click the **Shure Family hyperlink**.

Click the **Edit** Button for the Circle you want to update.

Click **Update/Delete**.



Enter your change and click **Update**.

A screenshot of a web form titled "Circle Definition". At the top right of the form area are three buttons: "Update", "Delete", and "Cancel". The form contains the following fields and controls:

- Name:** Text input field containing "Shure Family".
- Code:** Text input field containing "shure".
- Circle Type:** Dropdown menu.
- Circle Owner:** Text input field.
- Financials:** Check box, currently unchecked.
- Active:** Check box, currently checked.
- Relation Tree:** Check box, currently unchecked.
- Access:** Text input field containing "ABCDEFGHIJKLMNQRST".
- Access:** Text input field containing "abcdefghijklmnopqrstvwxyz".
- Maintenance:** Text input field containing "ABCDEFGHIJKLMNQRST".
- Maintenance:** Text input field containing "abcdefghijklmnopqrstvwxyz".
- Comment:** Large text area with a vertical scrollbar.

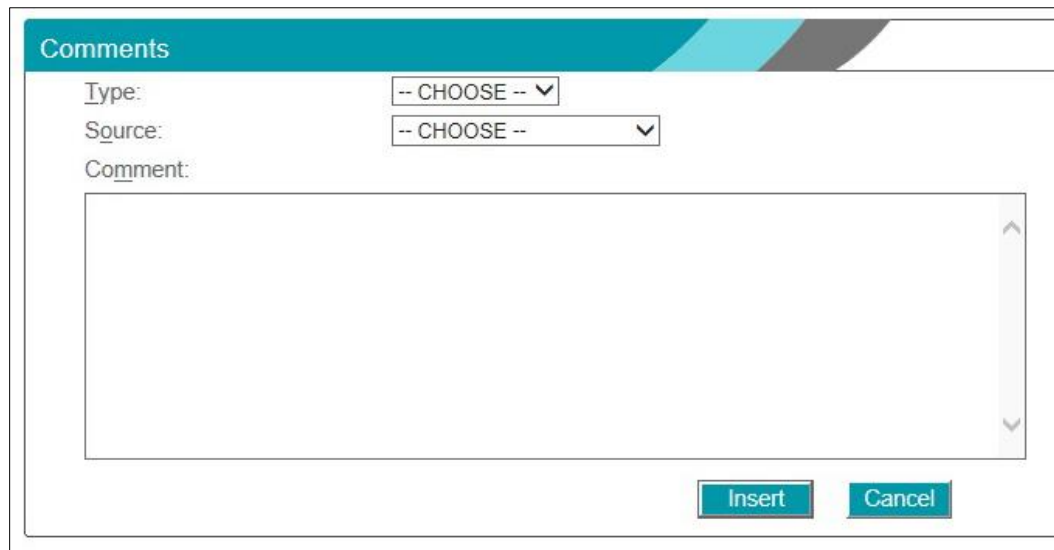
At the bottom right of the form area are three buttons: "Update", "Delete", and "Cancel".

The Comments Table

Data Entry



The Comments Table is a storage area for text. It provides a larger area for Comments than the attached comment columns that are found within the other Abila Millennium tables.



Comment columns should contain information that is specific to the row they are attached to; the Comments Table stores general information about the constituent.

Comments may be associated with a **Type** for grouping purposes.

Our Annual Fund Director would like a notation in Clark’s row that he enthusiastically supports the Annual Fund and frequently volunteers for Committee membership. Clark has been known to bolt out of meetings quite suddenly, though, and the Director would like everyone to know that as well. The Comment should be assigned a Type of Biographical.

Input a **Comments** row for Clark using the above information.

If your system administrator has set the comment field size to small, you will notice as you are typing the Comment that your cursor will continue scrolling across the box in one continuous line. Once you’ve inserted your row, however, the display will change appropriately.

If the comment field is set to large, as you type the text will wrap to the next line.



Notes

Coverage



There may be situations where one constituent routinely gives credit to another constituent when making a gift or pledge. This other constituent may be a family member. Or, the donor may be a family foundation and credit should be applied to members of the family. Rather than manually adding independent credit transactions or using On Behalf of, Abila Millennium provides Coverage functionality.

Coverage is a special kind of Abila Millennium relationship between two constituents. It is a specific Giving relationship; when one constituent in a Coverage relationship makes a donation, the second constituent in the relationship receives a credit for the donation.

When a Coverage relationship exists, the *covered* constituent will receive a soft credit when the *covering* constituent makes a donation. When a stand-alone gift, pledge, sustainer pledge, or expectancy transaction is created for the *covering* constituent, Abila Millennium automatically creates a credit transaction for the *covered* constituent.

Coverage relationships can be set up so they apply to a specific campaign, campaign year, and/or time period only.

Using coverage can streamline your data entry process and assure consistency in applying credits.

In **AS 103 Gift Processing** we will discuss the use of Coverage during transaction entry.

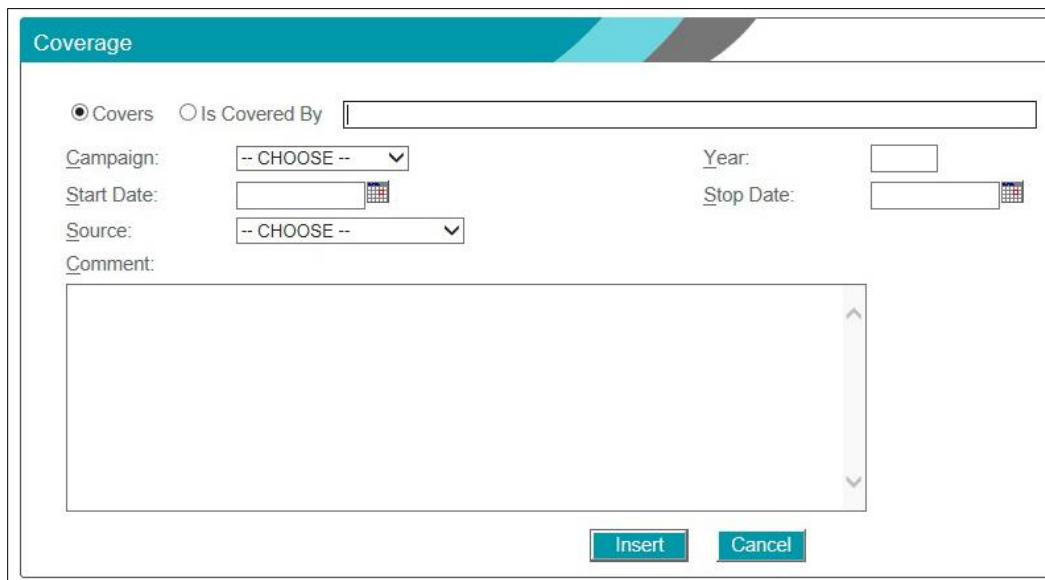
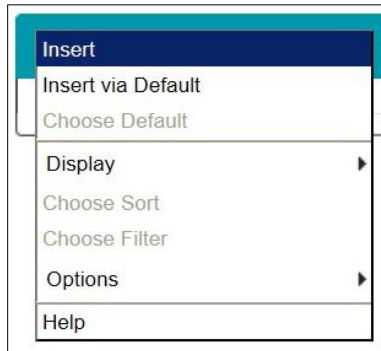
Creating a New Coverage Record

Beginning today, Jeff Shure covers his father, Paul Shure.

Search for **Jeff Shure's** record.

Navigate to **Profiles > Biographical > Coverage**.

Select **Insert** from the context menu.

A screenshot of a web form titled 'Coverage'. At the top, there are two radio buttons: 'Covers' (which is selected) and 'Is Covered By'. To the right of these is a text input field. Below this, there are several fields: 'Campaign:' with a dropdown menu showing '-- CHOOSE --', 'Year:' with a text input field, 'Start Date:' with a date picker, and 'Stop Date:' with a date picker. Below these is 'Source:' with a dropdown menu showing '-- CHOOSE --', and 'Comment:' with a large text area. At the bottom right of the form, there are two buttons: 'Insert' and 'Cancel'.

Select **Covers**.

Enter **Shure/Paul** in the name box.

Enter Start as **today's date**.

000000001 - Mr. Jeff R. Shure - 1985 - Alumni
Very Important Donor

Coverage

Covers Is Covered By

Campaign: Year:

Start Date: Stop Date:

Source:

Comment:

Click **Insert**.

Select **Paul Shure**.

000000001 - Mr. Jeff R. Shure - 1985 - Alumni
Very Important Donor

Coverage Id Search Results

Click an Id or name to select, Sort by Id and Display Unique List, or respecify the query.

Id	Format Name	Line 1	City Line	Const. Type	Pref. Year
0000001984	Mr. Paul Shure	3916 Fox Hunt Trail	Williamsburg, VA 23188	Alumni	1945

The search has returned 1 matches.

As with any Relationship row, the data is read from the top down.

000000001 - Mr. Jeff R. Shure - 1985 - Alumni
Very Important Donor

Coverage		
Covers:	Mr. Paul Shure	
Campaign:		Year:
Start Date:	Apr 08, 2014	Stop Date:
Source:		Apr 10, 2014 Class
Comment:		

0000001984 - Mr. Paul Shure - 1945 - Alumni

Coverage		
Is Covered By:	Mr. Jeff R. Shure	
Campaign:		Year:
Start Date:	Apr 08, 2014	Stop Date:
Source:		Apr 19, 2014 Class
Comment:		



Note: Abila Millennium automatically creates a reverse row that belongs to the second constituent in the Coverage relationship. The reverse Coverage row will use the reverse Coverage **Type**. And, it will duplicate the information the standard data fields such as **Campaign, Year, Start Date and Stop Date, Comment, and Source**. Information, if any, that was entered in custom fields on the original Coverage row (for example, **Custom Lookup 1** or **Custom Text 1**) will not be carried over to the reverse coverage row.



Note: Coverage rows are not standard Relationships. Coverage data is held in the **Coverage Table**.

Multiple Coverages

A constituent can **cover** more than one constituent. And a constituent can be **covered by** more than one constituent.

We have been informed that The Shure Foundation will cover several family members – Jeff Shure, Kathy Shure, Bradley Shure, and Paul Shure.

Search for **The Shure Foundation**.

Select **Insert** from the context menu

Create **Covers** relationships for Jeff, Kathy, Bradley, and Paul.

00000FND1 - Shure Foundation - Foundation	
Coverage	
<ul style="list-style-type: none"> ☰ Covers: Campaign: Start Date: Source: Comment: 	<p>Mr. Jeff R. Shure</p> <p>Year:</p> <p>Stop Date:</p> <p>Apr 19, 2014 Class</p>
<ul style="list-style-type: none"> ☰ Covers: Campaign: Start Date: Source: Comment: 	<p>Mrs. Kathy F. Shure</p> <p>Year:</p> <p>Stop Date:</p> <p>Apr 19, 2014 Class</p>
<ul style="list-style-type: none"> ☰ Covers: Campaign: Start Date: Source: Comment: 	<p>Mr. Bradley Shure</p> <p>Year:</p> <p>Stop Date:</p> <p>Apr 19, 2014 Class</p>
<ul style="list-style-type: none"> ☰ Covers: Campaign: Start Date: Source: Comment: 	<p>Mr. Paul Shure</p> <p>Year:</p> <p>Stop Date:</p> <p>Apr 19, 2014 Class</p>

Note that Paul is now covered by both Jeff Shure and The Shure Foundation.

0000001984 - Mr. Paul Shure - 1945 - Alumni		
Coverage		
Is Covered By:	Mr. Jeff R. Shure	Year:
Campaign:		Stop Date:
Start Date:	Apr 08, 2014	Apr 19, 2014 Class
Source:		
Comment:		
<hr/>		
Is Covered By:	Shure Foundation	Year:
Campaign:		Stop Date:
Start Date:		Apr 19, 2014 Class
Source:		
Comment:		

Spouse Coverage

If your organization does not use joint spouse gifts, you may find it helpful to create coverage relationships between spouses. This will create the hard money gift or pledge transaction on one spouse and automatically enter the appropriate credit or pledge credit transaction on the covered spouse.

In our organization, the hard money gift or pledge transaction will be entered on one record. The spouse needs to automatically receive the soft credit transaction.

0000000007 - Mr. Allan Early - Individual		
Coverage		
Covers:	Mrs. Starlette Early	Year:
Campaign:		Stop Date:
Start Date:		Apr 19, 2014 Class
Source:		
Comment:		



Note: Coverage and Relationships are entirely different data rows. A Spouse/Spouse Relationship does NOT create Coverage.

Notes

Linked Rows, Secondary Table Rows and Attachments

Now that we've got the basics of adding rows under our belts, let's look at a few variations on entering information into Abila Millennium.

Creating Linked Rows

The tables that are identified in the Profiles area of the Abila Millennium Explorer are considered Abila Millennium's **primary** tables. Remember, we discussed this in the **AS 101 Basic Navigation**.

For certain primary tables (such as **Attributes, Relationships, Actions and Tasks**), Abila Millennium will allow you to enter these rows through another primary table's display, thereby linking the rows together. In some cases, the linked rows will only display with the row they are linked to. In others, you have the flexibility to display them in both locations. See **My Millennium > User Options > Display Options**.

Display Options

Header Display Option: You may choose to whether or not to display the ID number in the header.

Display ID Number in the Header

Linked Data Display Option: There are several options for the display of linked data. Select the options below that you wish to utilize:

Display Linked Data in Short Display

Display Linked Data in One Screen Display (Please reference the Millennium Help for details on what Linked Data is displayed on the One Screen View.)

Display Linked Attributes in the Attribute Display

Let's consider the Attributes Table as an example.

Creating a Linked Row through a Primary Table

Linked Attributes

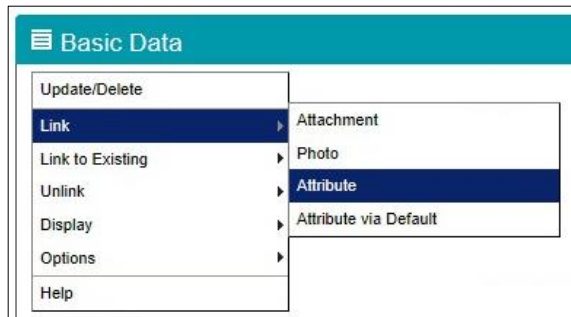
The Attributes Table is often used to store many different pieces of information and may get quite large. Any single constituent may have a very long list of Attributes.

A better way of organizing Attribute rows may be to categorize them and relate them directly to other Abila Millennium table information. For instance, you may be keeping significant fundraising-specific attributes in the Attributes Table. It might be more useful if these particular attributes are displayed with the Basic Data row.

To accomplish this, you would enter the Attribute row through the Basic Data row, rather than directly into the Attribute Table. The new Attribute row would then be displayed beneath the Basic Data row.

Let's first define how this is accomplished, and then we'll look at a few examples.

To enter a linked attribute row, display the **Primary Table** (Basic Data) and access the context menu. Select **Link Attribute**.



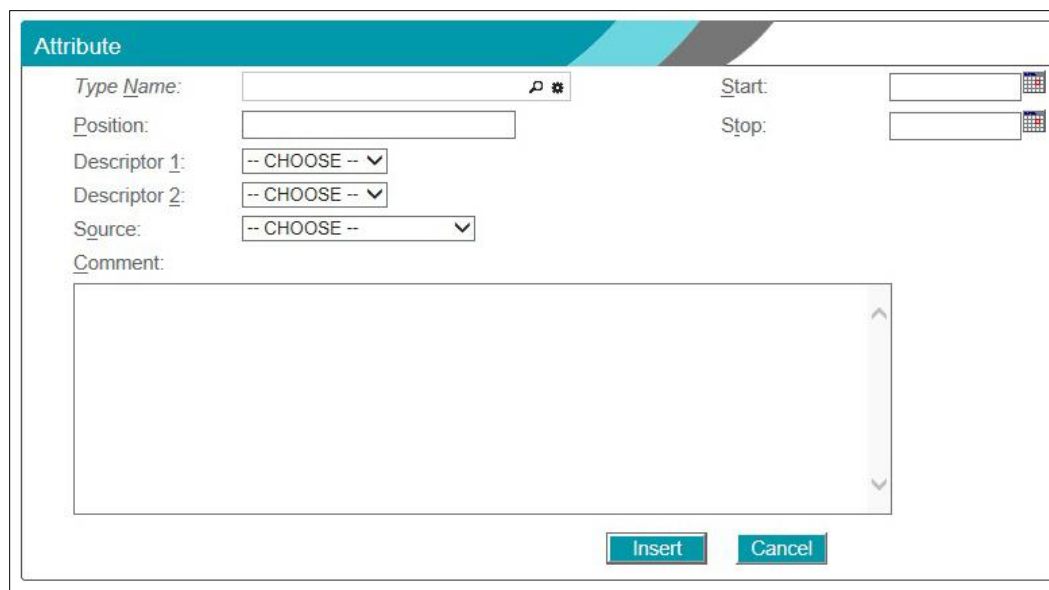
Clark agreed to work with the Special Support committee at Abila Millennium University for the 2009 calendar year. We have established Special Support as an Attribute in the Giving Interests group. Because this is an important piece of information, the Attribute should be linked to the Basic Data Table so that anyone looking at his primary screen will notice it immediately.

The Attribute Table form appears just as if we were entering the row directly into the Attribute Table.

Display Clark's Basic Data Table row.

Access the context menu.

Select **Link > Attribute**.

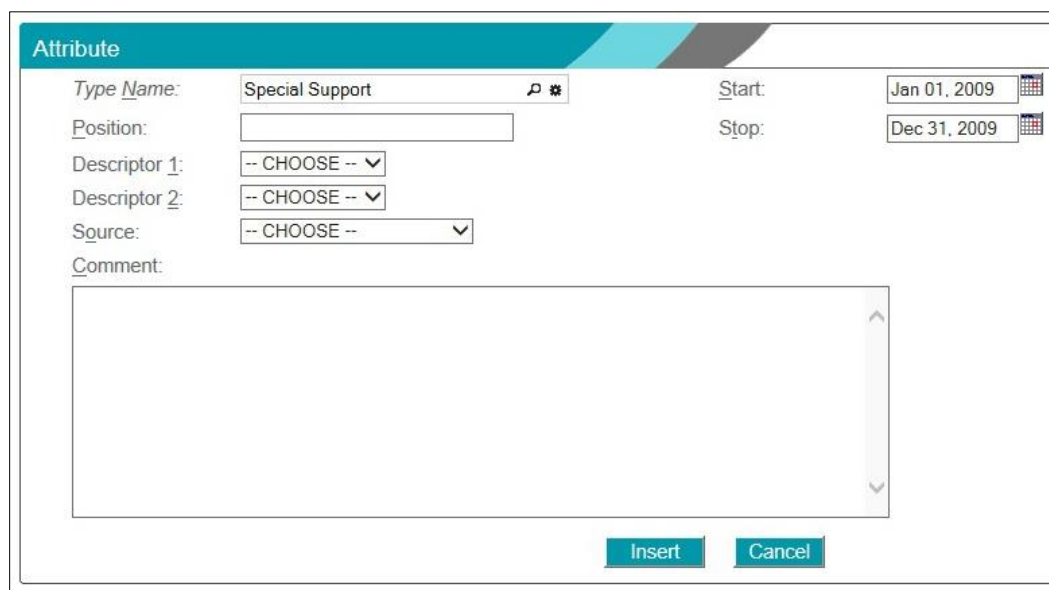


The screenshot shows the 'Attribute' form with the following fields:

- Type Name:
- Position:
- Descriptor 1: -- CHOOSE --
- Descriptor 2: -- CHOOSE --
- Source: -- CHOOSE --
- Comment:
- Start:
- Stop:

Buttons: Insert, Cancel

Enter the **Special Support** attribute and a **Start Date** and **End Date**.
Click **Insert**.



The screenshot shows the 'Attribute' form with the following fields:

- Type Name: Special Support
- Position:
- Descriptor 1: -- CHOOSE --
- Descriptor 2: -- CHOOSE --
- Source: -- CHOOSE --
- Comment:
- Start: Jan 01, 2009
- Stop: Dec 31, 2009

Buttons: Insert, Cancel

Linked table rows display at the bottom of the Primary Table row where they are attached.

For Basic Data and Prospect Tracking where there is only one row, all the attributes will display together at the bottom of the row. However, in the Education and Employment displays, the Attribute will display at the bottom of the row through which they were linked.

0000000279 - Mr. Clark Kent-abc - 1988 - Alumni			
VIP			
Basic Data			
Const. Type:	Alumni	Status:	Married
Birth Date:	1966/07/04	Gender:	M
# of Children:		Alternate ID:	
Active:	Yes	SS#:	###-##-4321
Pref. Year:	1988	Pref. School:	Arts and Sciences
Parent Year:		Parent School:	
Grandparent Yr:		Publish:	No
CAE Type:		Ethnic Group:	Caucasian
Source:	Constituent	Birth Nation:	USA
Title Bar:	VIP	Created:	Apr 06, 2014
Default Acct:			
Personally knows Superman		Apr 06, 2014 Class	
Basic Data Attribute			
Special Support			
Group:	Giving Interests	Start:	Jan 01, 2009
Position:		Stop:	Dec 31, 2009
Descriptor 1:			
Descriptor 2:			
Source:		Apr 06, 2014 Class	

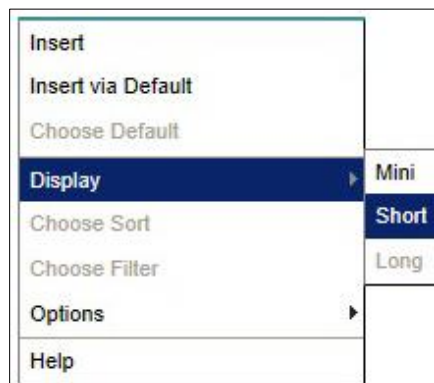
The name of the source table for the linked rows will be displayed as a header.

Display Options

The options of Mini, Short or Long display are also available to you for the linked row. To change the format of linked rows (Mini vs. Short Display vs. Long Display), select the option from the context menu for the linked row(s).

Let's say that we really don't need a Long Display of Attributes, whether they're linked or not. We need to change the Attribute Table to Short Display.

Select Short Display for the Basic Data Attribute.



Basic Data Attribute	
Special Support Group:	Giving Interests

Linking a Phone Number to an Address

Phone numbers that are not attached to a physical address (example, home phone, business phone) are usually stored in the Phone Numbers table. However, the option to link phone numbers with a particular address can come in handy. For example, if Clark has pager, you might find it more convenient to link that phone number to the appropriate address row.

There are two ways to make this link:

Option 1:

When the Address is initially inserted, selecting **Insert + Phone** after the Address information has been entered will open the Phone Numbers screen where you can insert a Phone Number to be linked to that address.

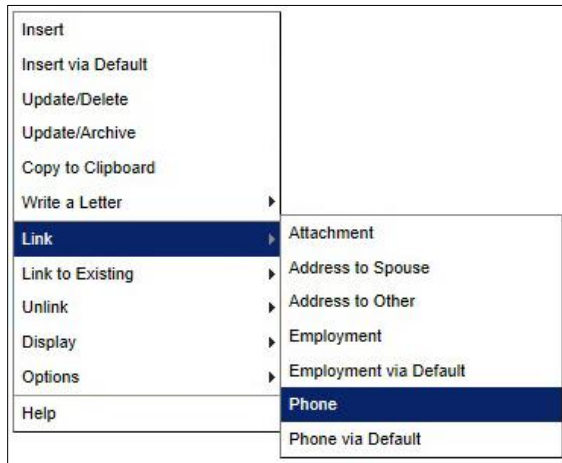
Address	
Line 1: <input type="text"/>	Locator: -- CHOOSE --
Line 2: <input type="text"/>	Type: -- CHOOSE --
Line 3: <input type="text"/>	Source: -- CHOOSE --
City: <input type="text"/>	Place: -- CHOOSE --
Zip: <input type="text"/>	
Country: USA	Phone Restrict: -- CHOOSE --
Phone #: <input type="text"/>	FAX Restrict: -- CHOOSE --
FAX #: <input type="text"/>	Alt# Restrict: -- CHOOSE --
Alt #: <input type="text"/>	Stop: <input type="text"/>
Start: <input type="text"/>	
Eff. Months: <input type="checkbox"/> Jan <input type="checkbox"/> Feb <input type="checkbox"/> Mar <input type="checkbox"/> Apr <input type="checkbox"/> May <input type="checkbox"/> Jun	
<input type="checkbox"/> Jul <input type="checkbox"/> Aug <input type="checkbox"/> Sep <input type="checkbox"/> Oct <input type="checkbox"/> Nov <input type="checkbox"/> Dec	
Utilization:	
<input type="checkbox"/> Preferred <input type="checkbox"/> Annual Fund <input type="checkbox"/> Athletics <input type="checkbox"/> Alumni Magazine	
<input type="checkbox"/> Solicitation <input type="checkbox"/> Mailcode 6 <input type="checkbox"/> Mailcode 7 <input type="checkbox"/> Mailcode 8	
<input type="checkbox"/> Mailcode 9 <input type="checkbox"/> Mailcode 10 <input type="checkbox"/> Mailcode 11 <input type="checkbox"/> Mailcode 12	
<input type="checkbox"/> Mailcode 13 <input type="checkbox"/> Mailcode 14 <input type="checkbox"/> Mailcode 15 <input type="checkbox"/> Mailcode 16	
<input type="checkbox"/> Mailcode 17 <input type="checkbox"/> Mailcode 18 <input type="checkbox"/> Mailcode 19 <input type="checkbox"/> Mailcode 20	
Comment:	
<input type="text"/>	
<input type="button" value="Insert"/> <input type="button" value="Insert + Phone"/> <input type="button" value="Cancel"/>	

Option 2:

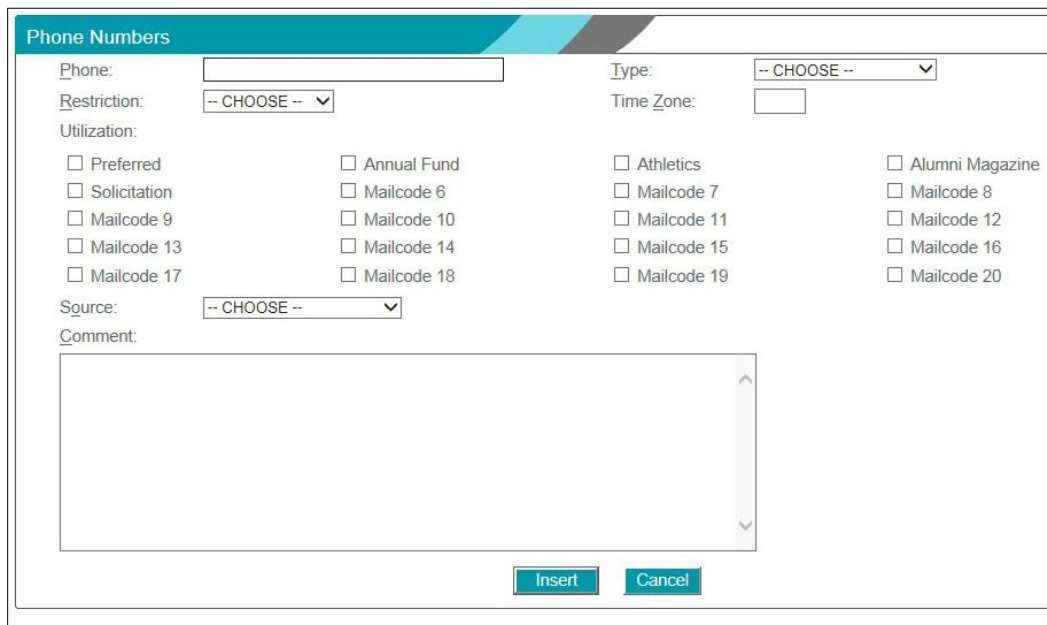
Select the **Address** table.

Access the context menu for Clark’s home address row.

Select **Link > Phone**.



The Phone Numbers insert screen will appear.



Enter the following information:

Phone: (757) 777-4444

Type: Pager

Phone Numbers

Phone: <input style="width: 80%;" type="text" value="(757)777-4444"/>	Type: <input style="width: 80%;" type="text" value="Pager"/>
Restriction: <input style="width: 80%;" type="text" value="-- CHOOSE --"/>	Time Zone: <input style="width: 80%;" type="text"/>
Utilization:	
<input type="checkbox"/> Preferred	<input type="checkbox"/> Annual Fund
<input type="checkbox"/> Solicitation	<input type="checkbox"/> Mailcode 6
<input type="checkbox"/> Mailcode 9	<input type="checkbox"/> Mailcode 10
<input type="checkbox"/> Mailcode 13	<input type="checkbox"/> Mailcode 14
<input type="checkbox"/> Mailcode 17	<input type="checkbox"/> Mailcode 18
<input type="checkbox"/> Athletics	<input type="checkbox"/> Alumni Magazine
<input type="checkbox"/> Mailcode 7	<input type="checkbox"/> Mailcode 8
<input type="checkbox"/> Mailcode 11	<input type="checkbox"/> Mailcode 12
<input type="checkbox"/> Mailcode 15	<input type="checkbox"/> Mailcode 16
<input type="checkbox"/> Mailcode 19	<input type="checkbox"/> Mailcode 20
Source: <input style="width: 80%;" type="text" value="-- CHOOSE --"/>	
Comment: <div style="border: 1px solid gray; height: 80px; width: 100%;"></div>	
<input style="margin-right: 20px;" type="button" value="Insert"/> <input type="button" value="Cancel"/>	

Click **Insert**.

Let's see what the link looks like.

Address			
<div style="border-bottom: 1px solid gray; padding: 5px;"> <input type="checkbox"/> 123 Metropolis Avenue Williamsburg, VA 23188 Phone #: (757)555-0911 </div>	Locator:		Good
	Type:		Home
<div style="border-bottom: 1px solid gray; padding: 5px;"> <input type="checkbox"/> 1 Main Street Williamsburg, VA 23188 Phone #: (757)555-8888 Phone: (757)777-4444 Restriction: Utilizations: NONE Source: </div>	Locator:		Good
	Type:	Type:	Business
	Time Zone:		Pager
			Apr 06, 2014 Class

You may link as many additional phone numbers as you wish.

Linking an Address to a Phone Number

If you would prefer to link an individual address to a phone number, the process starts with the Phone Numbers Table.

Select the context menu for Clark Kent's Pager.



Select **Link to Existing > Address**.

The next screen will give you the addresses available for linking.

Address			
123 Metropolis Avenue Williamsburg, VA 23188	Locator:	Good	
Phone #:	(757)555-0911	Type:	Home
Phone:	(757)570-8999	Type:	Cellular Phone
Restriction:		Time Zone:	
Utilizations:	NONE		
Source:		Apr 06, 2014 Class	
1 Main Street Williamsburg, VA 23188	Locator:	Good	
Phone #:	(757)555-8888	Type:	Business

Select the context menu for the Business Address.

Address to Link			
123 Metropolis Avenue		Locator:	Good
Williamsburg, VA 23188		Type:	Home
Country:		Source:	
Region:	Virginia Peninsula	County:	James City
Zone:		District:	
Phone #:	(757)555-0911	Territory:	Mid Atlantic
FAX #:		Phone Restrict:	Unlisted
Alt #:		FAX Restrict:	
Start:		Alt# Restrict:	
Time Zone:	ET	Stop:	
Eff. Months:	ALL	Apr 06, 2014 Class	
Utilization:	Preferred		
Clark has requested that we do not give out his home information			
1 Main Street		Locator:	Good
Williamsburg, VA 23188		Type:	Business
Country:	USA	Source:	
Region:	Virginia Peninsula	County:	James City
Zone:		District:	
Phone #:	(757)555-8888	Territory:	Mid Atlantic
FAX #:		Phone Restrict:	
Alt #:		FAX Restrict:	
Start:		Alt# Restrict:	
Time Zone:	ET	Stop:	
Eff. Months:	ALL	Apr 06, 2014 Class	
Utilization:	NONE		

Select **Link this Address**.

Link this Address
Insert new Linked Address
Insert new Linked Address via Default
Cancel Linking

The phone number will now appear linked below the Business Address. It has been moved from the Phone Numbers Table.

1 Main Street		Locator:	Good
Williamsburg, VA 23188		Type:	Business
Country:	USA	Source:	
Region:	Virginia Peninsula	County:	James City
Zone:		District:	
Phone #:	(757)555-8888	Territory:	Mid Atlantic
FAX #:		Phone Restrict:	
Alt #:		FAX Restrict:	
Start:		Alt# Restrict:	
Time Zone:	ET	Stop:	
Eff. Months:	ALL	Apr 06, 2014 Class	
Utilization:	NONE		
Map It			
Phone:	(757)777-4444	Type:	Pager
Restriction:		Time Zone:	
Utilizations:	NONE		
Source:		Apr 06, 2014 Class	

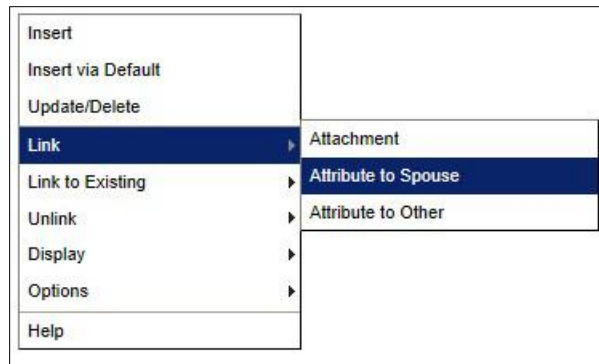
Creating a Linked Row to Another Constituent

In many cases, Abila Millennium can automatically link a row from one table to the same table of a spouse or other constituent. **This will create a new row** in the spouse’s or other constituent’s record. Let’s try it out on Clark’s Major Gift Committee attribute.

Locate Clark Kent’s Attribute table.

Access the context menu for the **Major Gifts Committee** attribute row.


Select **Link > Attribute to Spouse**.



Clark’s attribute display will change to show the link to Lois.

	Major Gifts Committee
	Group:
	Position:
	Descriptor 1:
	Descriptor 2:
	Source:
	Frequent contributor to scholarships
	Linked to Attribute for Ms. Lois Lane-abc

Clicking on the hyperlink will take you to the new attribute row in Lois' Attribute Table.

	Major Gifts Committee
	Group:
	Position:
	Descriptor 1:
	Descriptor 2:
	Source:
	Frequent contributor to scholarships
	Linked to Attribute for Mr. Clark Kent-abc

An attribute can also be linked to another constituent. This is done by selecting **Link Attribute to Other**.

Insert	
Insert via Default	
Update/Delete	
Link	Attachment
Link to Existing	Attribute to Spouse
Unlink	Attribute to Other
Display	
Options	
Help	

You will be presented with a Link Attribute ID Search screen.

Link Attribute Id Search
Must enter criteria to continue or [Cancel](#)

Please enter criteria for database search.
Format for Name is Last/First Middle. Partial and blank fields, as well as Wildcards('%' and '_'), are permitted.

Name / Id:

City: State:

Zip Code: Similar

Type in the Last Name/First Name or ID # of the constituent to whom you would like to link the attribute row. This will produce a Search Results screen. Click on the hyperlink for the appropriate constituent and the new linked attribute row will be created.

Linking Existing Rows

You can also link two existing rows. For example:

- you can link an existing Relationship row to a Tracking row for the same constituent, or
- you can link an Attribute row to the same Attribute row of a spouse or another constituent.

Link to existing rows is available for Attributes, Relationships, Actions, Demographics, Ratings, etc. The Primary Tables that can be 'linked to' will vary based on what is appropriate for the linking row. For example, Relationships can be linked to a Proposal, Planned Gift or Tracking row. Actions can be linked to Tasks, Planned Gift, and Proposal rows. By accessing the context menu for one of these rows, you will be able to see what functionality is available for a specific row. Please see the Abila Millennium online help files for additional information.

The process demonstrated below with attributes will be the same for rows in other tables. Please feel free to experiment with this linking functionality in the other tables as you learn about Abila Millennium.

Within the Same Constituent's Record

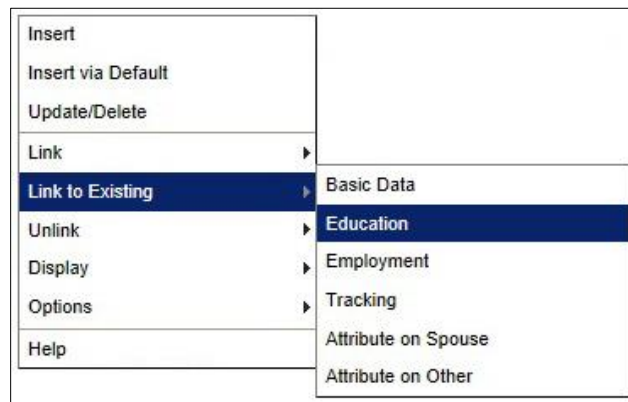
Abila Millennium can link existing Attributes to rows in other tables: Basic Data, Education, Employment, and Tracking rows. This link is within one constituent's data and is accomplished by using the context menu of a specific attribute in the Attributes table. Depending upon your selection in My Millennium > User Options > Display Options, when this process is completed, the attribute may or may not be available for viewing in the Attributes Table. It will always appear with the row it is linked to. We have decided that it makes more sense to link Undergraduate Activities group of attributes to the Education row of the school where this activity took place.

In Clark's case, this would mean linking the High Flyers Club attribute to the Abila Millennium University row.

In Clark Kent's Attribute table, locate the **High Flyers Club** attribute row.

Access the context menu for that row.

Select **Link to Existing Education**.



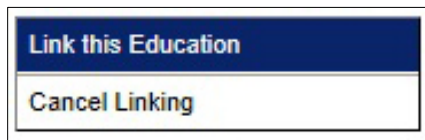
You will briefly see a second “holding” screen that contains the Attribute to Link:

This will be followed by a screen that shows all the rows from the table to be linked to. In Clark's case, there is only one row in the Education Table; however, there could be more than one row. For example, Clark could have received his Master's degree at another institution, in which case there would be two Education rows.

Education to Link			
Institution Name:	Millennium University	Degree Date:	1988/05/14
School:	Arts and Sciences	Preferred Date:	1988/05/14
Campus:		Years Attended:	1984-1988
Department:			
Concentration 1:	Journalism	Concentration 2:	
Concentration 3:		Concentration 4:	
Degree:	Bachelor of Art		
Source:		Apr 06, 2014 Class	

Select the edit button for Clark’s **Abila Millennium University – Bachelor of Arts** education row.

Select **Link this Education**.



When Abila Millennium completes this action, the holding screen for the attribute will disappear and you will be returned to the Attribute Table. The High Flyers Club attribute may no longer appear in the list of attributes viewed in the Attributes Table.

Let’s go see what happened to it.

Select Clark’s Education table from the Abila Millennium Explorer.

Make sure you have **Long Display** selected.

Education			
Institution Name:	Millennium University	Degree Date:	1988/05/14
School:	Arts and Sciences	Preferred Date:	1988/05/14
Campus:		Years Attended:	1984-1988
Department:			
Concentration 1:	Journalism	Concentration 2:	
Concentration 3:		Concentration 4:	
Degree:	Bachelor of Art		
Source:		Apr 06, 2014 Class	

Education Attribute			
High Flyers Aviation Club			
Group:	Undergraduate Activities	Start:	
Position:		Stop:	
Descriptor 1:			
Descriptor 2:			
Source:		Apr 06, 2014 Class	

Linking Two Existing Rows between Constituents

You can also link two existing rows between constituents. For example, you can link an Attribute row to the same Attribute row of a spouse or another constituent.

Let's see how this would work with the following example.

We have a married couple in our database, Joseph Jones and Rachel Martin, as separate constituents. Both spouses have the James Smithson Society attribute. It would be helpful to our fundraisers and our solicitation efforts to know that this is a shared interest for these two constituents.

We will start in Joe's Attribute Table.

Open the context menu for the **James Smithson Society** attribute row.

Select **Link to Existing Attribute on Spouse**.



You will see the “holding screen” for the attribute to be linked:

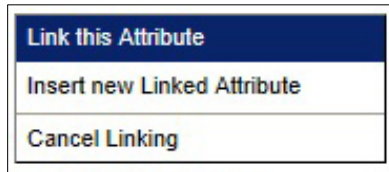


Because Joe Jones and Rachel Martin have a spouse relationship in Abila Millennium, you will automatically be taken to Rachel's Attribute table. The header will say Attribute to Link.

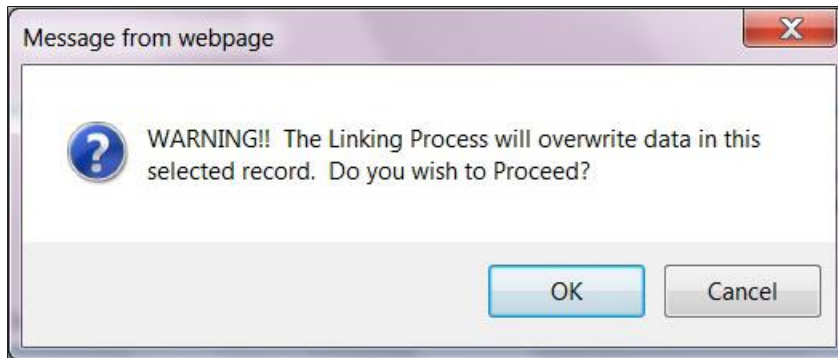
Scroll down to Rachel's **James Smithson Society** attribute.

Access the context menu for this attribute row.

Select **Link this Attribute**.



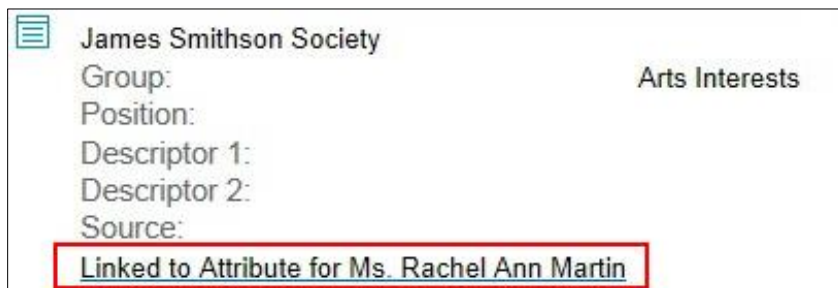
You will see the following message:



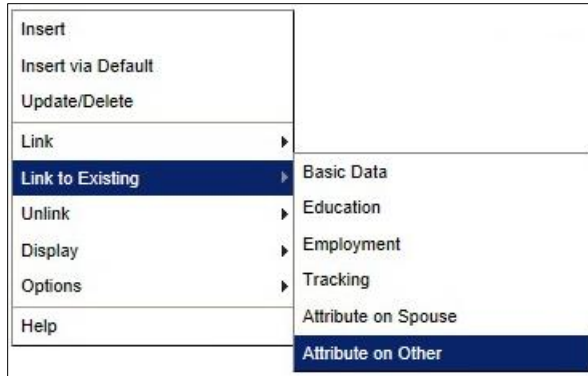
In this case, the warning message could be referring to the start and stop dates of Joe's attribute. If present, these dates will overwrite the start and stop dates of Rachel's attribute. Since there were no start and stop dates, this will not be a factor.

Click **OK**.

You will then be returned to your starting place – Joe's Attribute table. The hyperlink will be immediately available.

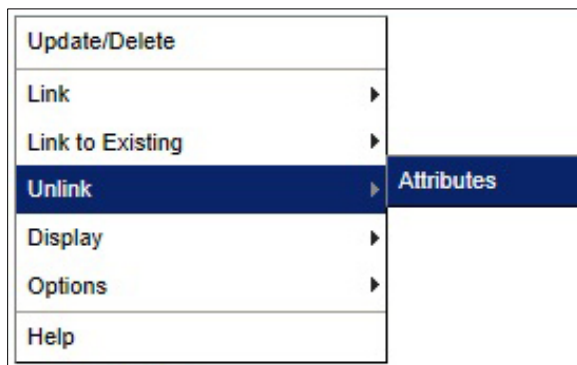


An attribute can also be linked to another constituent. This is done by selecting **Link to Existing Attribute on Other**. You will then get the familiar Search Screen to input the name or ID# of the Link to constituent.



Unlinking Attribute Rows

Once you have attached Attribute rows to Primary Tables, you can unlink all of them from the table at one time.



You'll note this option was grayed-out previously. It is only available after Attributes have been linked to primary table row(s).

The linked Attribute rows will not be deleted, but just moved to the Attributes display. The attributes have always resided in the Attributes table, but have been displaying in the table to which they are linked.

If you'd like, you may practice by unlinking Clark Kent's Attribute from the Basic Data Table and watch it move over to the Attributes Table.

Some final thoughts regarding linked table rows:

If you will be taking advantage of Abila Millennium's linked primary table rows feature, a publicized data entry policy must be enforced. It is crucial that everyone entering data into the system is aware of where these rows should be entered (into their own table, or linked to another). Inconsistency in data entry practices may result in a failure to locate important information. At the very least,

you may end up spending a great deal of time re-pointing rows that were entered incorrectly.

Secondary Table Rows

Abila Millennium contains several **secondary** tables that do not appear in the Abila Millennium Explorer. These tables hold information directly related to rows in the primary tables and can only be entered or viewed through those tables.

Abila Millennium's secondary tables and the primary table(s) they are attached to are:

<u>Secondary Table</u>	<u>Attached to Primary Table(s)</u>
Citizenship	Basic Data (Individuals)
Phone Numbers	Address
Internet Address	Address
Ratings	Tracking
Research Source	Tracking
Subscription	Membership
Benefits	Membership



NOTE: Many of these secondary tables will be discussed in subsequent Associate's Program workbooks. Those tables that are included in the Biographical area will be discussed in this section.

Display Options

As with linked Primary rows, you may change the display (Mini vs. Short vs. Long) of Secondary Table rows by using the appropriate selections on the table's header.

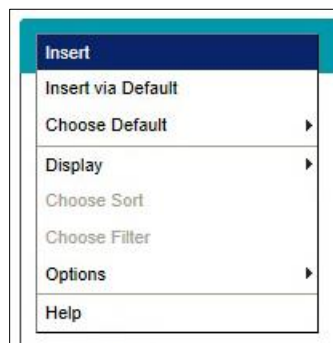
The Citizenship Table

The screenshot shows a form titled "Citizenship" with the following fields and controls:

- Type:** A dropdown menu currently showing "-- CHOOSE --".
- Country:** A dropdown menu currently showing "USA".
- Start Date:** A date input field with a calendar icon.
- Stop Date:** A date input field with a calendar icon.
- Source:** A dropdown menu currently showing "-- CHOOSE --".
- Comment:** A large text area for entering notes.
- Buttons:** "Insert" and "Cancel" buttons at the bottom right.

The Citizenship Table is used to maintain a record of your constituent's nationality, passports, visa information or miscellaneous privileges in other countries.

Data Entry



Citizenship rows are inserted through the Citizenship context menu. You may attach an unlimited number of Citizenship rows to an Individual's Basic Data Table row.

We recently discovered that Clark Kent actually holds dual citizenship in both the United States and Austria. We don't need to record his US Citizenship, but would like to make a note of his Austrian connection.

Select Clark Kent's Basic Data Table.

Select **Insert** from the Citizenship context menu.

Enter a new row using the above information.

Basic Data			
Const. Type:	Alumni	Status:	Married
Prof. Year:	1988	Prof. School:	Arts and Sciences
Citizenship			
Type:	Citizenship	Country:	Austria
Start Date:		Stop Date:	Apr 06, 2014 Class
Source:			







The Death Table

Biographical
Address
Attribute
Basic Data
Circle
Comments
Correspond
Coverage
Custom Profile
Death
Education
Employment
Event Log
Name
Relations
Relation Tree

The Death Table is a primary table in Abila Millennium. The Death Table is used to record as much (or as little) information as you have regarding a constituent's demise.

The creation of a Death row effectively flags the constituent as **Deceased** so that you may remove the constituent from mailings and other reports. A Death row may also be created for Corporations and Foundations that are no longer in existence, marking them as **Disbanded**.

You may not have any information about the death other than the fact that it occurred – you don't know when, where or how. In that situation, simply creating a blank Death row will be sufficient to flag the constituent.

Death			
Date of Death:	<input type="text"/> 	Cause:	<input type="text"/>
City:	<input type="text"/>	Place:	-- CHOOSE -- 
Country:	USA 	Notified Date:	<input type="text"/> 
Notified By:	<input type="text"/>	Corrob. Date:	<input type="text"/> 
Corroborated:	<input type="text"/>	Source:	-- CHOOSE -- 
Comments:	<input type="text"/>		
<input type="button" value="Insert"/> <input type="button" value="Cancel"/>			

Data Entry

The **Notified By** column is used to indicate how your organization discovered that the constituent is deceased (for example, Spouse, Obituary).

The **Corroborated By** column is used to indicate who at your organization verified the constituent's death.

Once a Death row is created, Abila Millennium automatically performs the following functions:

- The word **Deceased** or **Disbanded** will appear next to the constituent's name in the Title Bar, in the Search Results display during a constituent search, and in all hypertext links that contain the constituent's name.
- The **Locator** column in all Address rows is changed to Deceased.
- All **Married Marital Status** columns are changed to **Deceased Spouse**.
- If the spouse is also a constituent on the system, their **Marital Status** will change to **Surviving Spouse**.
- All **Spouse/Spouse** relationships will be changed to **Deceased Spouse/Surviving Spouse**.
- All **name formats** combined with spouse will revert to single names
- **Employment** records will change to **No longer at this position** and all employee/employer relationships will change to **Former**.

If the non-constituent spouse of a dies, you may enter an additional Name row with a Type of Deceased Spouse if you wish to record the deceased spouse's name.

Let's create a Death row and investigate the results.

While glancing through the paper, you spot an article about Charles Kensington in the Obituaries section. You recognize his name because he recently contributed \$10,000 to your Capital Campaign. Mr. Kensington passed away at his home in Sandusky, Ohio on March 1, 2009 as a result of a massive stroke. Let's make sure this is properly recorded.

Perform a constituent search for **Charles Kensington**.

Before we enter a Death row, let's look around first to verify a few things.

Display the **Basic Data** Table to verify that his Marital Status is **Married**.

Display the **Address** Table to verify that both Home and Business Address rows have Locators of **Good**.

Display the **Relationship** Table to verify that he has a **Spouse/Spouse** Relationship.

Display his Employment and Relationship rows to verify active employment and current relationships.

OK, let's create the Death row.

Display the Death table.

Access the context menu.

Input a Death row based on the information we have available.

Click **Insert**.

The next time you access Mr. Kensington's record, you will notice that **Deceased** appears in the Title Bar beside Mr. Kensington's name. Let's see what else has changed...

000000066 - Mr. Charles Kensington - 1988 - Alumni - Deceased
VIP

Abila Millennium's automatic deceased functions are quite powerful.

Display the **Basic Data** Table to verify that his Marital Status is **Deceased Spouse**.

Display the **Address** Table to verify that both Address rows have Locators of **Deceased**.

Display his **Employment** record to verify that he is no longer at this position.

Display his **Relationship** Table to verify that he is a **Former Employee** as well as a **Surviving Spouse**.

Use the **Spouse** menu (or the hypertext link) to navigate to his spouse.

Display the **Basic Data** Table to verify that her Marital Status is **Surviving Spouse**.

Display the **Relationship** Table to verify her Surviving Spouse/Deceased Spouse Relationship.

As powerful as Abila Millennium is, it *cannot resurrect a constituent* for whom you have created a deceased row. To reverse the actions performed by the deceased function, you must manually delete the Death row and change all affected columns back to the original state one-by-one.

Not an easy task.

The Phone Numbers Table

Phone Numbers

Phone:

Restriction:

Utilization:

<input type="checkbox"/> Preferred	<input type="checkbox"/> Annual Fund	<input type="checkbox"/> Athletics	<input type="checkbox"/> Alumni Magazine
<input type="checkbox"/> Solicitation	<input type="checkbox"/> Mailcode 6	<input type="checkbox"/> Mailcode 7	<input type="checkbox"/> Mailcode 8
<input type="checkbox"/> Mailcode 9	<input type="checkbox"/> Mailcode 10	<input type="checkbox"/> Mailcode 11	<input type="checkbox"/> Mailcode 12
<input type="checkbox"/> Mailcode 13	<input type="checkbox"/> Mailcode 14	<input type="checkbox"/> Mailcode 15	<input type="checkbox"/> Mailcode 16
<input type="checkbox"/> Mailcode 17	<input type="checkbox"/> Mailcode 18	<input type="checkbox"/> Mailcode 19	<input type="checkbox"/> Mailcode 20

Source:

Comment:

The Phone Numbers Table can be used to store additional phone numbers for your constituent that could not (or should not) be contained within the Address row. In some cases you may have several phone numbers at a constituent’s business address location that need to be recorded and the Address row simply cannot accommodate them all. In other situations, it may not be appropriate to associate a phone number with a particular Address row. Examples of these would include cellular phones, car phones, pagers, Internet, and email, etc.

Data Entry

In order to be able to contact Lois Lane at any time, let’s include her pager number in the Phone Numbers Table. The number is (757) 777-4445 and is most definitely unpublished.

Display Lois Lane’s Address table.

Access the context menu for the Phone Numbers table.

Insert a Phone Number row with the above information.

Phone Numbers			
	Phone:	(757) 777-4445	Type: Pager
	Restriction:	Unlisted	Time Zone:
	Utilizations:	NONE	
	Source:		Apr 06, 2014 Class

The Internet Address Table

The Internet Address table is a secondary table designed to hold a constituent's email and web page addresses. The Internet Address table is associated with the Address table for display purposes. This means that to view or access the information in the Internet Address rows, you must access the Address information, using the Abila Millennium Explorer.

Internet Address

Email/WWW address:

Type:

Preferred: Restriction:

Start Date: Stop Date:

Source:

Comment:

Internet Address

Email/WWW address:

Type:

Preferred: Restriction:

Start Date: Stop Date:

Source:

Comment:

Internet Address

Email/WWW address:	supermantotherescue@visi.net
Type:	E-Mail
Preferred:	No
Start Date:	Restriction:
Source:	Stop Date:
Comment:	Apr 06, 2014 Class
Email/WWW address: www.SupermanToTheRescue.com	
Type:	Internet Add
Preferred:	No
Start Date:	Restriction:
Source:	Stop Date:
Comment:	Apr 06, 2014 Class

Attachments

Every row may have multiple attachments. An attachment could be a word processing document, a scanned image, a graphic file, a spreadsheet, an audio, a video, or any other type of file.

There are certain requirements for attachment files.

- It must be associated with an application (the appropriate software program for that type of file) in order to open and view or edit the file. This is usually done automatically as the file was created. Internet Explorer recognizes the application for most files.
- It must be stored in the **Inetpub\www.root\mill\docs** directory or in a subdirectory of **docs**. In fact, it may be useful to create subdirectories for each office within your organization, or for the kinds of files (pictures, bios, correspondence, etc.), as a means of organizing them. You may also create virtual directories.
- The connection between the attachment file and the Abila Millennium row is created via the same context menu used to link attributes. Remember, you access the context menu by passing the mouse pointer over the Edit arrow button.

When a file has been attached to a row in Abila Millennium, the name of the file (and the directory path name, if one exists) will be shown in the display as a hyperlink, following the label, Attachment:

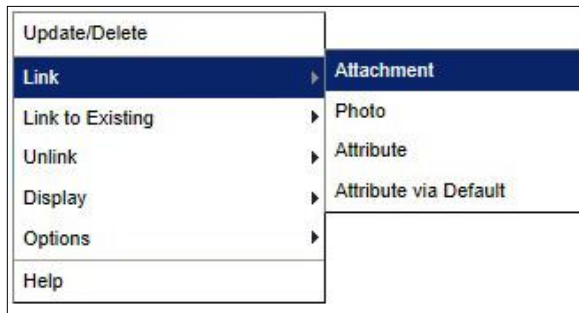
When you click on the hyperlink, the file will be opened and displayed using the associated application. If there are multiple attachments, each hyperlink will be labeled and appear on a line of its own.

To Link an Attachment

Display and identify the Abila Millennium row (ex: Media) to which you want to add an attachment.

Access the context menu.

Select **Link Attachment**. The display frame will show a new form.



 A screenshot of a form titled 'Attachments'. At the top, it says 'Click Browse to choose the file you wish to attach. Otherwise, you may enter the attachment name directly.' Below this is a 'Location:' label followed by a text input field and a 'Browse...' button. Underneath is an 'Attachment:' label followed by another text input field. Below that is a 'Description:' label followed by a larger text area with a vertical scrollbar. At the bottom of the form are three buttons: 'Insert and Upload', 'Insert', and 'Cancel'.

Browse to the current location of the file you wish to attach by using the Browse button.

Enter a description of the attachment.

Click **Upload and Insert** to copy the file from its current location to the Inetpub\wwwroot\mill\docs folder.

Let's test this out...

Create a simple Word Document and save it on your computer with the name **kentinfo.doc**.

Display Clark's **Basic Data** row.

Access the context menu.

Select **Link Attachment**.

Browse to your new kentinfo.doc document.

Enter **kentinf.doc** into the Attachment Name column.

Enter **research summary** into the Description box.

Click **Insert and Upload** to add the attachment.

Once you attach the document, the hypertext link is established. Abila Millennium will automatically look for your document in the Inetpub\www.root\mill\docs folder.



NOTE: A photograph or .wav files can also be linked to the Basic Data row using the same process.

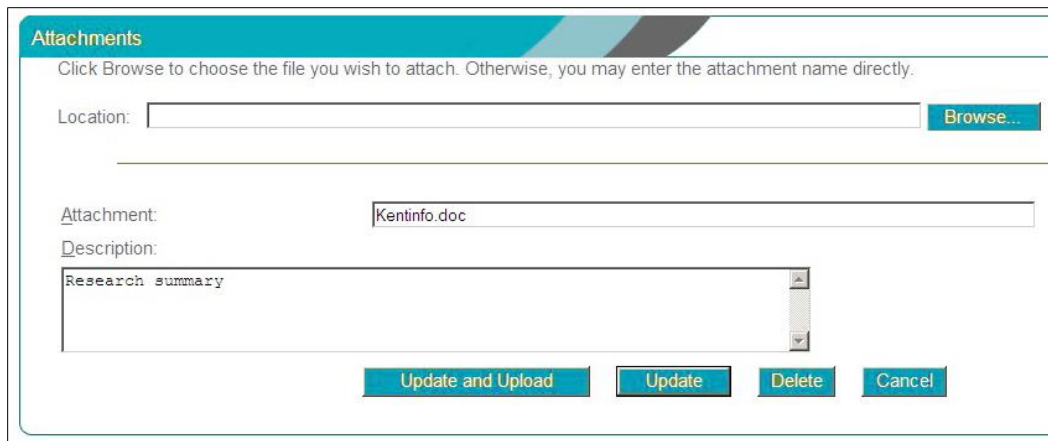
Unlinking Attachments

If you wish, you may unlink all attachments from a row. The files are not deleted or moved from the directory but the links to the Abila Millennium row are removed.

Display and identify the Abila Millennium row which has attachments you wish to unlink.

Access the context menu.

Select **Update/Delete**.



Click **Delete**. This action unlinks this attachment from that row.

Alerts



Some constituents (usually major donors) have very specific preferences that will impact how their information is entered or revealed in Abila Millennium. The **Alerts** menu item in the Abila Millennium Explorer allows you to keep these instructions available for these constituents in a handy pop-up instruction box when you access, insert or edit their data.

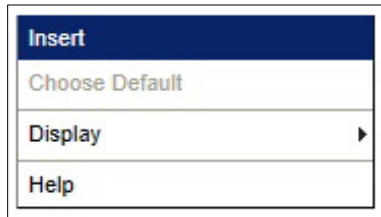
Let's look at an example of how this would look.

Clark Kent called and requested that all of his addresses and phone numbers should be marked 'unlisted'.

Access Clark Kent's information in Abila Millennium. (It doesn't matter which table – but Abila Millennium must be viewing the specific constituent on whom you want to record an Alert.)

Select **Alerts** on the Abila Millennium Explorer.

Select **Insert** from the Alerts Title Bar menu.



The Alerts insert form will appear.

 A screenshot of the "Alerts" insert form. The form has a teal header with the word "Alerts". Below the header are several fields:

- Table:** A drop-down menu with "-- CHOOSE --" selected.
- Type:** Three radio buttons: "Public" (selected), "Group", and "Private".
- Begin:** A date input field with a calendar icon.
- End:** A date input field with a calendar icon.
- Source:** A drop-down menu with "-- CHOOSE --" selected.
- *Alert:** A large text area for entering the alert message.

 At the bottom right of the form are two buttons: "Insert" and "Cancel".

The default **Type** is **Public** – which means that all Abila Millennium users that have the security to view, insert, or edit address or phone information for Clark Kent will see the message. **Group** would only show the pop-up message to others that are in **your** Abila Millennium group – a security setting determined by your system administrator. **Private** would be for your eyes only.

Table: contains a drop-down menu with the listing of all the tables in Abila Millennium as well as **Constituent**. You may choose a specific table so when that table is accessed, the message will appear. If you choose **Constituent** the message will appear whenever that constituent's information is accessed – regardless of the table.

Alerts can also be time sensitive with **Begin** and **End** dates.

In the Table box, select **Addresses**.

In the Source box, select **Constituent**.

In the message area, enter the text you want to appear on the pop-up alert box.

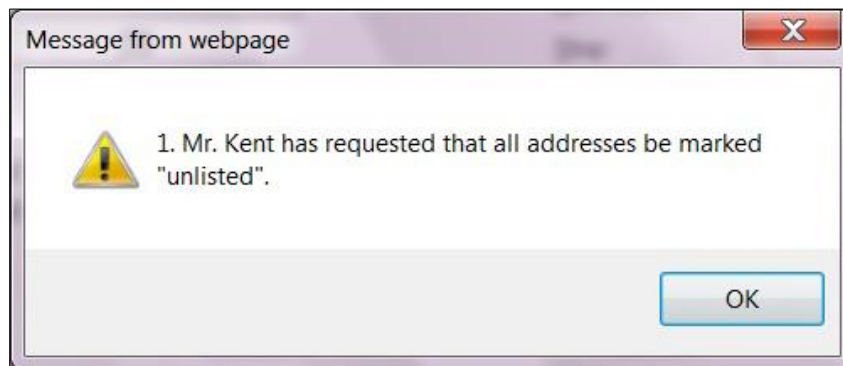
Click **Insert**.

Repeat the process with the Phone Numbers table.

Let's see how this will look.

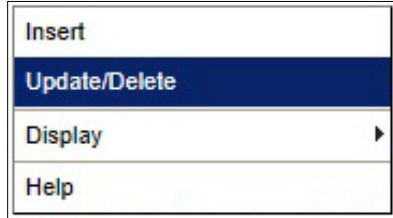
Select Clark's Address Table.

Select **Insert** from the Address Table menu.



This message will appear when you access, insert a new address, or update/delete or update/archive an address.

Alerts can be easily modified or deleted by using the Alerts context menu.



As you can see, this process can be very helpful in keeping information for certain constituents the way they want it!

Notes

Editing and Deleting Rows

Editing and Deleting Rows

Whether it's changing an address, correcting a mistake or removing a constituent entirely, we're all in the business of updating information on a daily basis.

During data entry, once you press the Insert button, the row is permanently saved into the Table.

To edit or delete a row, you must access the row's context menu.



Note: Abila Millennium provides security features that can limit edit and/or delete capabilities based upon a user's login. Contact your system administrator for more information about your security privileges.

Verifying Edits

As you work with Abila Millennium, you may notice information in a particular constituent's row that just doesn't look right. If there is ever any question as to the data you're seeing displayed on the screen, Abila Millennium provides a means of tracking down the user that last edited the row!

Basic Data			
Const. Type:	Alumni	Status:	Married
Birth Date:	1966/07/04	Gender:	M
# of Children:		Alternate ID:	
Active:	Yes	SS#:	###-##-4321
Pref. Year:	1988	Pref. School:	Arts and Sciences
Parent Year:		Parent School:	
Grandparent Yr:		Publish:	No
CAE Type:		Ethnic Group:	Caucasian
Source:	Constituent	Birth Nation:	USA
Title Bar:	VIP	Created:	Apr 06, 2014
Default Acct:			
Personally knows Superman		Apr 06, 2014 Class	

When a row is edited and re-saved, the ID of the user who modified the row and the modification date are added to the display screen in the lower right corner of the row.

By consulting the user that last modified the row in question, you may be able to piece together the mystery!

In the case of the Basic Data Table row, the **Created Date** always remains the same, indicating when the constituent was originally added to the system.

Updating a Constituent's Address Information

When you receive new information about your constituent, you should consider whether or not you want to:

- Simply edit the existing row with the new information,
- or
- Edit the existing row to reflect a change in status and then insert a new row with the edited information.

Some outdated information is actually helpful to fundraisers. A history of former addresses, for example, helps the fundraiser to see whether the constituent has moved up or moved down – this might be an indication as to the constituent's financial status. A history of Employment might also provide the same indication.

Maintaining historical information does reach the point of diminishing return, however, and data administrators need to apply some judgment and policy as to the number of outdated rows maintained on the system.

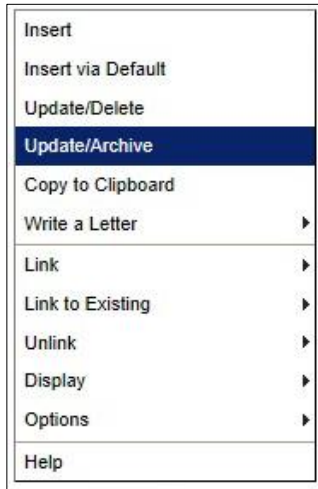
Abila Millennium has the functionality available to accomplish either scenario easily.

Let's demonstrate how this is done.



You've received a change of address form for Clark Kent which came back as a result of a recent mailing. His new address is 407 American Road, Williamsburg, VA 23188. You verify that his phone number has also changed to (757) 555-9211 and is no longer unlisted. The Development Director has requested that we retain old Address information for a period of 5 years.

Display Clark's Address Table.

Select **Update/Archive**.



Edit his home address row to reflect the new address information.

Address			
 123 Metropolis Avenue	Locator:	Former	Former Home
	Type:		
	Source:		
Williamsburg, VA 23188	County:	James City	
Country:	District:		
Region: Virginia Peninsula	Territory:	Mid Atlantic	
Zone:	Phone Restrict:	Unlisted	
Phone #: (757)555-0911	FAX Restrict:		
FAX #:	Alt# Restrict:		
Alt #:	Stop:	Apr 06, 2014	
Start:	Apr 06, 2014 Class		
Time Zone: ET			
Eff. Months: ALL			
Utilization: NONE			
Map It			
 407 American Road	Locator:	Good	Home
	Type:		
	Source:		
Williamsburg, VA 23188	County:	James City	
Country:	District:		
Region: Virginia Peninsula	Territory:	Mid Atlantic	
Zone:	Phone Restrict:		
Phone #: (757) 555-9211	FAX Restrict:		
FAX #:	Alt# Restrict:		
Alt #:	Stop:		
Start: Apr 06, 2014	Apr 06, 2014 Class		
Time Zone: ET			
Eff. Months: ALL			
Utilization: Preferred			
Map It			

Click **Insert**.



NOTE: When archiving Address rows, the Preferred checkmark will automatically transfer to the updated address. The locator for the old address will automatically change to **Former** and the Type will change to **Former [type]**. Start end Stop Dates will also be entered by the system.

Updating Other Information

Another example of when you should edit an existing row and add a new row occurs in the Employment Table. When you are updating a constituent's employment information to reflect a change in job, the best practice would be to change the existing row's Status column to **No Longer At This Position** and enter the current employment information as a new row with a Status of **Active**. Update/Archive is also available for Employment.

In some situations it will appear obvious that you must edit the existing row and should not, or cannot add a new row. For example, the Basic Data Table can only store one row per constituent; this prevents you from adding another row.

Determine what your organization's policy is regarding updating vs. adding new rows prior to making any changes to a constituent's row.

Deleting Rows

The Delete option in a row's context menu will permanently delete the row.

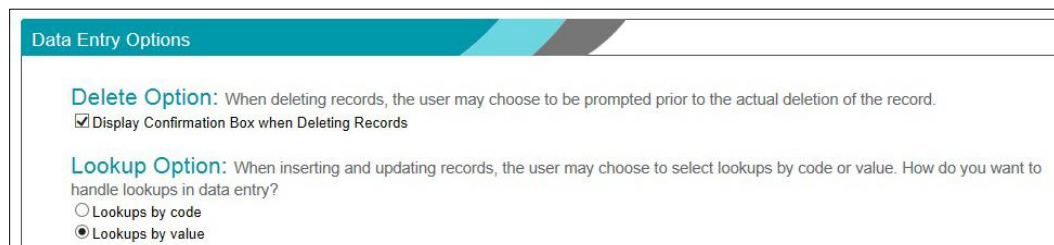
THERE IS NO UNDO FUNCTION AVAILABLE FOR RETRIEVING A DELETED ROW.

Make certain you intend to permanently remove the row prior to pressing the Delete button. The only recourse you may have available for retrieving a deleted row is to restore the entire Table using the last backup tape or disk from your data backup system.

Your personal data entry settings may provide a buffer and ask one last time if you want to delete the row.

My Millennium > User Options > Data Entry

Check the box next to Display Confirmation Box when Deleting Records.



The screenshot shows a window titled "Data Entry Options" with a teal header. It contains two sections:

- Delete Option:** When deleting records, the user may choose to be prompted prior to the actual deletion of the record. There is a checked checkbox for "Display Confirmation Box when Deleting Records".
- Lookup Option:** When inserting and updating records, the user may choose to select lookups by code or value. How do you want to handle lookups in data entry? There are two radio buttons: "Lookups by code" (unselected) and "Lookups by value" (selected).

To delete all of a constituent's rows in any one Table, you must delete each row individually.

Deleting the Constituent from the System

From time to time you may need to remove a constituent entirely from your database. The constituent might have been entered in error. He or she might have been initially entered as a prospect but never turned (or never will turn) into a donor and therefore is not worth carrying in the system. The constituent may have been deceased for years and it is no longer necessary to maintain their rows.

To remove all of a constituent's rows from the database, delete the Basic Data Table row.

The process of deleting the Basic Data Table row deletes all of the other rows associated with that constituent id number, effectively removing the constituent from the database. All gifts, relationships, actions, events, etc. and cross reference links and other linked rows naming the constituent are also removed from other constituents' tables.

There is no undo or system function to recover a deleted constituent.

The decision to remove a constituent from your database must be considered very carefully! For obvious reasons, a mistake in judgment might prove to be extremely dangerous to your database.

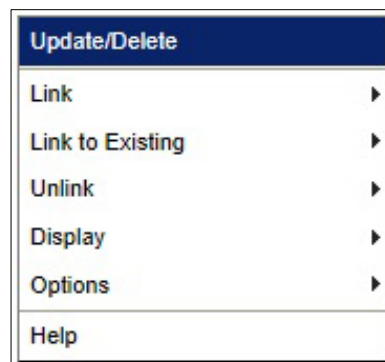
The VP of Advancement has authorized the removal of Mr. John Doe, from the database. Mr. Doe (ID #20) has been deceased for several years and has no living relatives. We no longer need to keep his information in the system.

Perform a search for **John Doe**.

Display the Basic Table.

Access the context menu.

Select **Update/Delete**.



There is no undo function available for retrieving deleted rows. That is why Abila Millennium asks you to make certain you intend to permanently remove ALL of the constituent's rows and all references to the constituent prior to pressing the Delete button.

If you have carefully considered and know you are doing the correct thing, click **Delete**. Abila Millennium will again warn you, one last time, prior to deleting a Basic Data row— **BE CAREFUL!** There are no warning messages for any other deletions.

The screenshot shows the 'Basic Data' form in Abila Millennium. The form contains various fields for constituent information, including 'Const. Type' (set to 'Alumni'), 'Birth Date', '# of Children', 'Active' (checked), 'Pref. Year' (1951), 'Parent Year', 'Grandparent Yr.', 'CAE Type', 'Source', 'Title Bar', 'Default Acct', and 'Comment'. On the right side, there are fields for 'Status' (Married), 'Gender' (M), 'Alternate ID' (A0000020), 'SS#', 'Pref. School' (Arts and Sciences), 'Parent School', and 'Publish' (checked). At the top right of the form are buttons for 'Update', 'Delete', and 'Cancel'. A modal dialog box titled 'Message from webpage' is overlaid on the form, displaying a warning icon and the text: 'WARNING!! ALL Information will be Deleted for this ID. Do you wish to Proceed?'. The dialog box has 'OK' and 'Cancel' buttons at the bottom.



TIP: The only recourse you may have available for retrieving a deleted constituent is to restore the entire SYSTEM using the last backup tape or disk from your data backup system.



Note: Abila Millennium allows organizations to decide whether or not constituents with giving or dues transactions can be deleted. Your system administrator maintains this system-wide setting.

Notes

Hypertext Links

We have just discussed Linked or Associated Primary and Secondary Table rows. These rows, while they are linked together for display purposes, are not hypertext links. Hypertext links differ in their features and the benefits they provide.

In Abila Millennium, the most common use of hypertext links is to quickly navigate through the system in your quest for information. When two rows are joined by a hypertext link (as indicated by bold, underlined text), you may click on the link to jump from the current row to the linked row.

Hypertext links may also provide a very important benefit directly related to data entry. In some cases, once a hypertext link is established, a modification made to one row will automatically be reproduced on the other linked row!

Can you see the immediate benefit to that? Let's use an Address row as an example. Suppose we have two constituents in the system who both reside at the same address. If they change their home phone number, you must edit both constituents' Address rows individually. However, if those Address rows are linked, you would only need to make the change on one row and the other row would automatically change with it!

Let's first review the hypertext links that Abila Millennium automatically provides within the Biographical Tables and then we'll discuss how to establish your own hypertext links.

Automatic Relationship Links

Once certain rows are entered into Abila Millennium, the system will establish a hypertext link for you. This occurs primarily within the Relationship Table as a result of one of the following situations.


Entering a Constituent Relationship

Once you enter a constituent Relationship row into Abila Millennium, the system will automatically enter the corresponding (sometimes reverse) Relationship row for the other named constituent.

For example, if you enter a **Father/Son** relationship for Joseph Jones indicating another constituent (Tommy Jones) as his son, the corresponding **Son/Father** relationship would be created in Tommy's Relationship Table, naming Joseph as the Father.

The **Spouse/Spouse** relationship is a commonly used example of this. Once this Relationship row is entered, you can quickly move back and forth between the two spouses to verify information.

Mr. Jeff R. Shure

	Is a:	Spouse
	Whose:	Spouse
	Is:	Mrs. Kathy F. Shure - 1990 - Alumni

Mrs. Kathy F. Shure

	Is a:	Spouse
	Whose:	Spouse
	Is:	Mr. Jeff R. Shure - 1985 - Alumni

In addition to establishing this hypertext link, Abila Millennium will also activate the Spouse button, which will allow you to jump between the spouses regardless of whether you happen to be viewing the Relationship Table.



Creating a Spouse/Spouse relationship also provides an added benefit of updating each constituent's Marital Status columns to **Married**.

A Spouse/Spouse relationship can also trigger standard name combinations.

Once these Relationship rows are entered, a hypertext link is established between the two constituents allowing you to jump between them. In addition, any change made to one Relationship row will be duplicated on the linked row.



Note: The same hypertext link and its associated properties apply for **Life Partner/Life Partner** relationships.

Entering a Constituent Employment Row

Another example of an automatic link occurs once you enter an Employment row that names a constituent company in the Firm column.

As soon as this row is entered, an **Employee/Employer** and the reciprocal **Employer/Employee** Relationship rows are created. Once again, this link can be used for navigation and an edit to one will also be performed on the other.

Software Associates, Inc.

Is a:	Employer	
Whose:	Employee	
Is:	Mr. Jeff R. Shure - 1985 - Alumni	
Begin:		End:
Group:	Employment	
Source:		Mar 11, 2002 aaa

Mr. Jeff R. Shure

Is a:	Employee	
Whose:	Employer	
Is:	Software Associates, Inc. - Corporation	
Begin:		End:
Group:	Employment	
Source:		Feb 05, 2001 ccc

These types of automatic links are provided without any extra work on your part – a nice feature! Now let's discuss how to establish your own hypertext links and the benefits they provide.

Linked Addresses

The most common instance where you might establish your own hypertext link occurs with joining two Address rows. As previously mentioned, the advantage is having to edit only one of the rows when there is a change in any of the information.

Spouse Linked Addresses

If you have two constituents on your system, you may link their addresses together. In some situations it is linking the home address together while in other situations it may be linking an employee's business address to his employer.

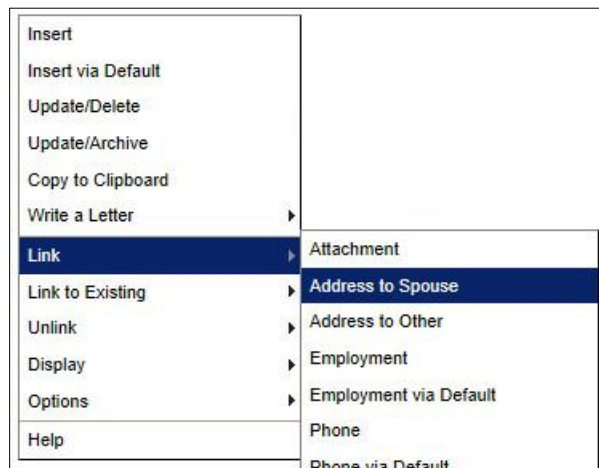
In order to create a link between two Address rows, you must input the address link through the constituent with the existing Address row.

To create a linked Address, display one constituent's Address row (the one you want to link), right click to access the context menu and select the appropriate **Link Address** option. For spouses, you would **Link > Address to Spouse**. This applies to life partners as well. For constituents other than spouses and life partners, select **Link > Address to Other**.

Since they are married now, Lois will be moving in with Clark. Let's create a Spouse Linked Address for Lois and Clark. Since Lois is moving in with Clark, we'll use his home address to establish the link.

Display Clark's Home Address row.

From the context menu select **Link > Address to Spouse**.



The link should be immediately established. Based on Clark's **Spouse/Spouse** relationship with Lois, Abila Millennium knows exactly who's moving in!

000000279 - Mr. Clark Kent-abc - 1988 - Alumni
VIP

Address (home Filter)

407 American Road	Locator:	Good
	Type:	Home
	Source:	
Williamsburg, VA 23188	County:	James City
Country:	District:	
Region:	Territory:	Mid Atlantic
Zone:	Phone Restrict:	
Phone #:	FAX Restrict:	
FAX #:	Alt# Restrict:	
Alt #:	Stop:	
Start:	Apr 06, 2014 Class	
Time Zone:	ET	
Eff. Months:	ALL	
Utilization:	Preferred	

Map It

Linked to Address for Ms. Lois Lane-abc

Let's take a look at Lois' Address Table now.

Click the **hypertext link**.

You may need to scroll down in the display to view the linked home address.

When selecting **Link > Address to Spouse** from the context menu, a duplicate Address row is created and entered into the spouse's Address Table.

Now that the link has been established, any change you make to one address will also affect the other.



TIP: If the original spouse's Address row is marked **Preferred**, this will also carry over to the other spouse's Address row.

If this address is not the preferred address for the other spouse, you must edit the row and remove the **Preferred** checkmark on the newly created row.

Removing the **Preferred** checkmark on one Address row will not affect the original spouse's preferred address -- this is an exception to the normal action of duplicating changes.

As this is also Lois' new Preferred Address, we can leave the **Preferred** status at that.

Uh oh. Now we have two Preferred Home Address rows for Lois!

When linking spouse addresses, you must consider the following two possibilities:

- One spouse has an Address row which is now obsolete.

In this situation, you must edit the previous Address to reflect a change in status, i.e. from **Good** to **Former** or **Returned** and remove the Preferred checkmark if it exists. You may also simply delete the old Address row -- check your organization's policy for maintaining old Address rows.

- One spouse already has the same Address row, but it is unlinked.

In this situation, a duplicate Address row will be created. You must delete the previously existing unlinked row from the spouse's table, leaving the new linked Address row.

Let's correct the situation for Lois by changing her old home address to **Former**.

Edit Lois' previous Home Address row.

Change the Locator from **Good** to **Former**.

Remove the **Preferred** checkmark.

As a general rule, you should create a Spouse Linked Address when you marry two constituents in Abila Millennium, or when initially entering a constituent's spouse into the system.

If you are initially entering the spouse of a constituent into the system and you will be creating a Spouse Linked Address, press **Cancel** out of the Address Maintenance Screen when it is presented during the initial data entry process.

You may then navigate to the original constituent's Address row and input the new spouse's address by linking through that row. This will save you from the extra step of deleting an unlinked address.



NOTE: The **Link >Address to Spouse** option will only display if:

The constituent is married to another constituent. (They have a constituent Spouse/Spouse relationship in the table.)
and
The constituent does not already have a Spouse Linked Address.

Other Linked Addresses

You may also wish to link Address rows between unmarried constituents. (This is not the same situation as with Life Partners who have a **Life Partner** relationship between constituents in Abila Millennium. Their addresses may be linked using the **Link > Address to Spouse** option.)

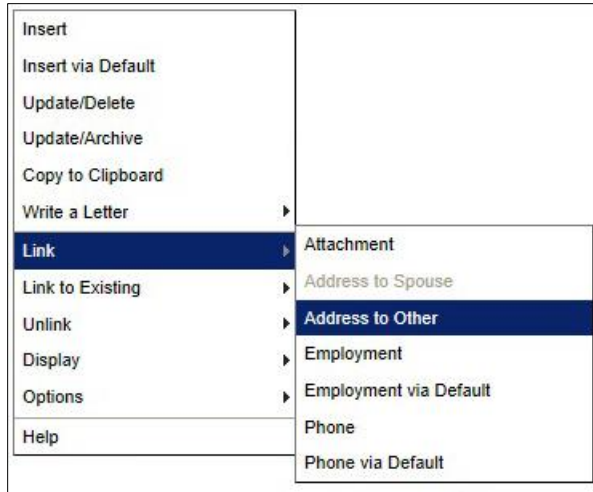
Examples of usage include: other family members or unrelated constituents (roommates) that reside at the same address, constituents with the same business address, etc. (Business linked addresses will be discussed in the next section.)

To establish a link between the Address rows of two unmarried constituents:

Display one constituent's Address row.

Access the context menu.

Select **Link > Address to Other**.



The Constituent Search page will be displayed.

 A screenshot of a web form titled 'Link Address Id Search'. Below the title is a red instruction: 'Must enter criteria to continue or [Cancel](#)'. Below that is a note: 'Please enter criteria for database search. Format for Name is Last/First Middle. Partial and blank fields, as well as Wildcards('%' and '_'), are permitted.' The form contains four input fields: 'Name / Id:' (a text box), 'City:' (a text box), 'State:' (a dropdown menu), and 'Zip Code:' (a text box). There is a 'Search' button and a 'Similar' checkbox.

Identify (by Name or by ID) the constituent that should receive the linked address.

If you are entering the constituent's name, you must follow the standard Abila Millennium name convention of Last/First Middle; Suffix. Otherwise, you may simply enter the other constituent's ID into the column.

If more than one constituent is found on the system based upon your input, the Search Results page will indicate the choices from which you have to select.

As with the Spouse Linked Address, a new Address will be created in the other constituent's Address Table that duplicates the constituent's address and the two will be linked together with a hypertext link. You may need follow the steps outlined above to remove duplicated addresses.

The final example of linked Address rows occurs between a constituent's Business Address row and his Employer's Business Address row.

Linked Business Addresses

Remember, the primary advantage of establishing linked Address rows? If you make a change on one, it will automatically affect all others.

The final example of creating a linked address really brings this point home. What if you have a company on your system (with a business address) and also have several (or hundreds of!) employees on your system each with the same business address.

What happens if the company's phone number or other information changes? Well, you would have to edit the company's business address row and all of the individual employees' business address rows. This could be quite a chore!

If you establish a link between the company's business address and each employee's business address, a change on the company's row will also change all other rows throughout the system! Great, let's do it!

To establish a link between a company's business address and an employee's business address, display the company's address, edit the row and select **Link > Address to Other**. Identify the employee's Name or ID in the constituent search form.

We'd like to establish a linked Business Address between The Daily Planet and its employees. Let's start by creating a linked business address for Clark.

Perform a search for the **Daily Planet**.

Display the Address Table and edit the Business Address row.

Select **Link > Address to Other** from the context menu.

Enter **Kent/Clark** as the Name.

Link Address Id Search

Must enter criteria to continue or [Cancel](#)

Please enter criteria for database search.
Format for Name is Last/First Middle. Partial and blank fields, as well as Wildcards('%' and '_'), are permitted.

Name / Id:

City: State:

Zip Code: Similar

Select **Mr. Clark Kent** in the Address Link ID Search Results screen.

0000000280 - The Daily Planet-abc - Corporation						
Address Link Id Search Results						
Click an Id or name to select, Sort by Id and Display Unique List , or respecify the query .						
Id	Format Name	Line 1	City Line	Const. Type	Const. Year	Const. Year
0000000279	Mr. Clark Kent-abc	407 American Road	Williamsburg, VA 23188	Alumni		1988

Once again notice the hypertext link established.

1 Main Street			Locator:	Good
			Type:	Business
			Source:	
Williamsburg, VA 23188				
Country:	USA		County:	James City
Region:	Virginia Peninsula		District:	
Zone:			Territory:	Mid Atlantic
Phone #:	(757)555-8000		Phone Restrict:	
FAX #:	(757)555-8001		FAX Restrict:	
Alt #:			Alt# Restrict:	
Start:			Stop:	
Time Zone:	ET		Apr 06, 2014	David
Eff. Months:	ALL			
Utilization:	Preferred			
Map It				
Linked to Address for Mr. Clark Kent-abc				

Let's go over to Clark's Address Table to see what it looks like over there.

Execute the hypertext link and scroll through Clark's address rows until you locate the linked business address.

1 Main Street			Locator:	Good
			Type:	Business
			Source:	
Williamsburg, VA 23188				
Country:	USA		County:	James City
Region:	Virginia Peninsula		District:	
Zone:			Territory:	Mid Atlantic
Phone #:	(757)555-8000		Phone Restrict:	
FAX #:	(757)555-8001		FAX Restrict:	
Alt #:			Alt# Restrict:	
Start:			Stop:	
Time Zone:	ET		Apr 06, 2014	Class
Eff. Months:	ALL			
Utilization:	Preferred			
Map It				
Linked to Address for The Daily Planet-abc				

When linking a company's preferred business address to an employee, remember to remove the **Preferred** checkmark on the employee's side unless it also happens to be their preferred address.

Clark's business address is not his preferred address, so we need to fix that.

Edit Clark's linked business address to remove the **Preferred** checkmark.

1 Main Street		Locator:	Good
Williamsburg, VA 23188		Type:	Business
Country:	USA	Source:	
Region:	Virginia Peninsula	County:	James City
Zone:		District:	
Phone #:	(757)555-8000	Territory:	Mid Atlantic
FAX #:	(757)555-8001	Phone Restrict:	
Alt #:		FAX Restrict:	
Start:		Alt# Restrict:	
Time Zone:	ET	Stop:	
Eff. Months:	ALL	Apr 06, 2014 Class	
Utilization:	NONE		
Map It			
Linked to Address for The Daily Planet-abc			

One more thing. . .

When creating linked business addresses between an employer and its employees, you must remember to delete any unlinked business address rows that may already exist in the employees' Address Table.

Clark already had a business address so we'll need to delete it.

Edit Clark's old unlinked business address row.

Access the context menu.

Select **Delete** to remove the duplicate address.

Now this may seem to be a lot of work, just to link Address rows. However, the long-term benefits will outweigh any clean-up work that you may initially have during the setup of hypertext links.

Now that we've taken care of Clark, it's on to Lois!

Repeat the same process to establish a link between the Daily Planet's business address and a new business address for Lois Lane.

When you establish employer/employee linked business addresses, you must consider the following scenarios.

Remember that when you establish the link, an exact duplicate of the employer's business address is created for the employee. In most situations, that would be perfectly acceptable. Two exceptions are as follows:

- The employee has a different phone number or extension than the company's main number.

This situation can be easily remedied. Leave the company's main number on the linked business address row. Include the employee's personal business phone number in an attached Phone Number row. Use a Type of **Local Business** or some similar indicator.

- The employee does not work at the same **location** as the company's corporate office that's reflected on their business address.

This situation is a little trickier. First of all, you would not establish a link between these two Address rows. Instead, you might use one of the following options:

Create additional **Address** rows in the company's **Address** table for the local branches, identifying them as a **Type of Business**, not **preferred**, and maybe placing a **Comment of Local Branch**. Use these rows to create linked business address rows for the employees of the branches.

or

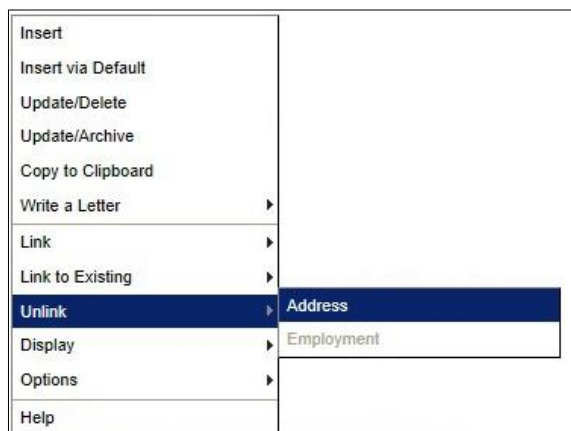
Create additional constituents in the system for each of the company's branches and use their address rows to create linked business address rows for the employees.

You will need to thoroughly examine the implications of using either of these methods prior to their widespread use.

Unlinking or Deleting Linked Addresses

If, for some reason, you need to unlink **Address** rows once the link has been established, Abila Millennium provides an option for this. You may need to do this when the two constituents no longer live at the same address, or if the employee no longer works for the company.

To **Unlink Address** rows, select the **Unlink > Address** option from the context menu on either constituent.



This procedure will remove the **hypertext links**, not the Address rows. You must then delete the rows individually if you wish to remove both rows from the system.

Address/Employment Links

Up until now we've discussed linking rows within the same Table (Address to Address). Another hypertext link that you may establish involves linking an employee's Business Address row with his/her Employment row.

Inputting Linked Employment through Addresses

While we might have a record of a constituent's employment in the Employment table (indicating the name of the company and the position held) and a business address in the Address table (indicating the street address and phone number of the company), there is nothing that links these two pieces of information together.

Establishing a link between these two rows not only enables a hypertext link between the two rows, but also provides greater flexibility in reporting. When extracting a constituent's complete business address for a report, mailing label or other purpose, it is easier to have these two rows linked together so that the system will know that they go together.

You can always get an accurate business address label if the constituent has only one good business address and one active employment row.

But what if . . . let's look at this example:

John Lewis, who happens to have two jobs, has the following rows in his Address and Employment Tables.

Address
<p>(Good, Home, Preferred)</p> <p>8 Sunny Lane</p> <p>Central Village, NY 19191</p>

(Good, Business) 123 South Avenue Central Village, NY 19191
(Good, Business) 456 Ninth Street Outskirts, NY 19111
Employment
(Active) T Shirts, Inc. Sales Associate
(Active) Computers R Us Sales Associate

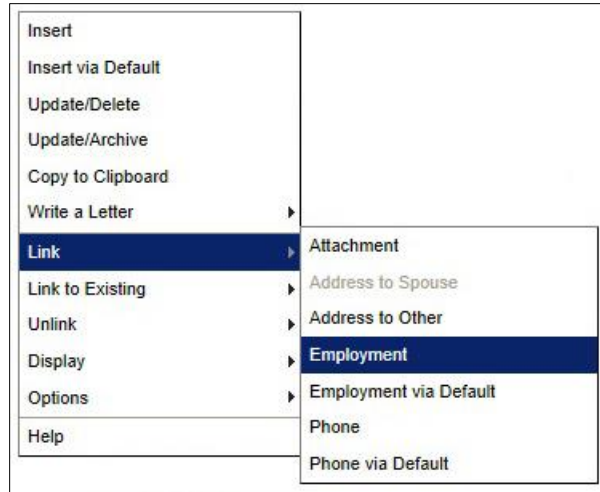
Without links established, how could you tell which business address goes with which employment row? More importantly, how could the system tell when you ask it to print a business address label?

To establish a link between a Business Address row and an Employment row, edit the constituent's business address row and select **Link > Employment** from the context menu.

Let's practice this technique using our old friend Clark.

Display **Clark's** Address Table and edit his linked **Business Address** row.

Select **Link > Employment** option from the context menu.



The Employment Maintenance page will appear as if you were entering a new row into the Employment Table.

Complete the information in the Maintenance page, as noted in the following box, remembering to accurately record the company name or ID in the Firm column.

Enter the following information into the **Employment** form:

Firm	"your" Daily Planet
Title:	Reporter
Status:	Active
Begin Date:	9/25/09
Source:	Constituent

Employment

Firm:

Division:

Title:

Occupation:

Industry:

Begin:

Descriptor 1:

End:

Descriptor 2:

Salary:

Descriptor 3:

Source:

Status:

Comment:

If the company is a constituent on the system, ensure that the constituent search process identifies the correct company.

000000279 - Mr. Clark Kent-abc - 1988 - Alumni
VIP

Employer Id Search Results

Click an Id or name to select, [Sort by Id and Display Unique List](#), or [respecify the query](#).

Id	Format Name	Line 1	City Line	Const. Type	Pref. Year
000000280	The Daily Planet-abc	1 Main Street	Williamsburg, VA 23188	Corporation	

Notice that Clark’s Business Address now has two hypertext links, one to his Employment row (**Linked to Employer**) and to The Daily Planet’s business address (**Linked to Address for.**)

1 Main Street

Locator: Good
Type: Business
Source:

Williamsburg, VA 23188

Country: USA
Region: Virginia Peninsula
County: James City
District:
Territory: Mid Atlantic

Phone #: (757)555-8000
FAX #: (757)555-8001
Phone Restrict:
FAX Restrict:
Alt# Restrict:
Stop:
Time Zone: ET
Eff. Months: ALL
Utilization: NONE
Apr 06, 2014 Class

[Map It](#)

[Linked to Address for The Daily Planet-abc](#)
[Linked to Employer Daily Planet-abc](#)

Once again, a very important point:

If the constituent already had an existing Employment row when the **Input Linked Employment** option was selected, a duplicate row will be created. You must delete the original unlinked Employment row.

Sure enough, Clark already had an active Employment row for The Daily Planet in his table. We'll need to remove it.

Edit the unlinked Employment row.

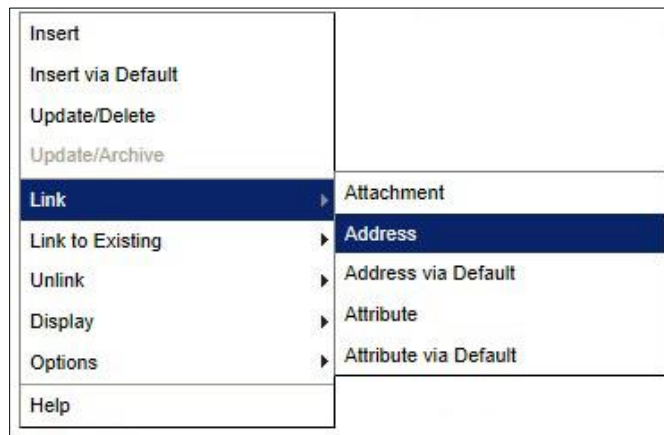
From the context menu, click **Delete** to remove the old row.

That's better!

While the advantages of linking Employment rows to Business Address rows are clear, you can see that it can cause lots of problems if not consistently maintained!



NOTE: You may also enter a business address through the Employment row by selecting **Link > Address** from the Context Menu on the Employment side.



Generally speaking, if you will be linking your constituents' Business Address rows to their Employment rows, enter the Employment row through the Business Address row immediately after you enter the business address.

Unlinking or Deleting Linked Employment

To unlink an Employment row from a Business Address row, edit the Business Address row and select **Unlink > Employment** from the context menu.

You may also point to the **Employment Row** and select **Unlink > Address** from the context menu.

This procedure will remove the hypertext links, not the Employment or Address rows. You must delete the rows individually if you wish to remove either row from the system.

While establishing hypertext links between your constituents' rows can be a worthwhile process, you must take great care in ensuring that you have strict data entry policies in place so that everyone is aware of how and where to enter rows.

Notes

Default Forms

Default Forms are templates used in data entry to help reduce the amount of repetitive typing. When a mass rows need to be entered that feature some degree of identical information, you may elect to create a Default Form. The common information is entered in **once** in the default form definition, then the Default Form is used repeatedly during data entry. Default Forms can be a lifesaver when you need to enter many similar rows!

The most common usage of Default Forms occurs during gift processing and entry. When a Gift Processor enters a batch of gifts that contains similar pieces of information (i.e. all are gift transactions to the Annual Fund Campaign, with the same Campaign Year, tendered by the same vehicle, and were solicited as a result of the Phonathon), this common information is entered into a Default Form. When the Gift Processor enters the gifts using the Default Form, the appropriate columns are automatically filled in, leaving only the unique columns to enter!

Another common usage of Default Forms involves entering identical **Attribute** rows for several constituents. When an Attribute Default Form is established, all of the available columns may be entered into it. Then, the data entry operator needs only display the constituent and add the fully completed row without any keystrokes at all!



NOTE: Each user can save several default forms for each table. The user may choose which default to use. The most recently used form will be flagged as Active.

We know you can't wait to learn this one, so let's go!

On September 25, 2013, Abila Millennium University inducted four members into the Century Club, an elite group of donors. Century Club members are flagged with an Attribute row. Membership expires one year from the date of induction. The newest Century Club members: Clark Kent, Lois Lane, Jeff Shure and Kathy Shure.

Rather than typing this information four times, let's create a Default Form to do the work for us.

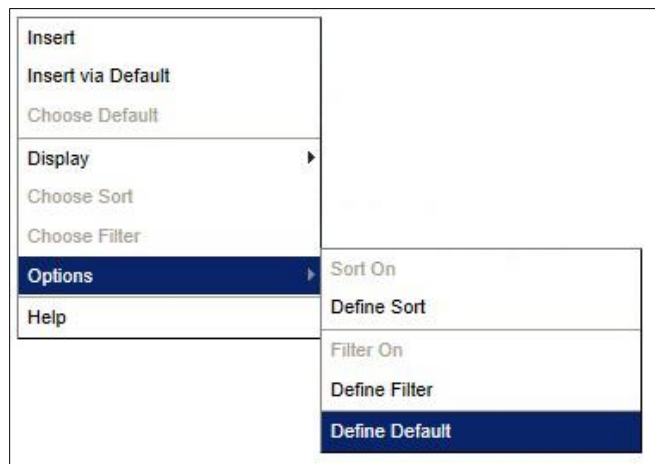
Defining a Default Form

You must first **define** a Default Form and enter the common information before you can actually use it during data entry.

Go to Clark Kent's **Attribute Table**.

Select the context menu.

Select **Options > Define Default**.



Click **OK**.

Attribute Default

*Default Name: Active

Type Name: Ⓜ * Start: 📅

Position: Stop: 📅

Descriptor 1: -- CHOOSE -- ▾

Descriptor 2: -- CHOOSE -- ▾

Source: -- CHOOSE -- ▾

Comment:

Since you can have multiple defaults, you need to name each default you create.

Enter the following information into the **Attribute Default Insert Form**.

Default Name:	Century Club default
Type Name:	Century Club
Start	September 25, 2013
Stop:	September 24, 2015

Click **Insert**.

Attribute Default

*Default Name: Active

Type Name: Start:

Position: Stop:

Descriptor 1: -- CHOOSE --

Descriptor 2: -- CHOOSE --

Source: -- CHOOSE --

Comment:

Now that the Default Form has been defined, we'll go on to the next step



NOTE: Clicking on Define Default in the context menu in Basic Data, will result in a prompt for you to specify **Person, Corporation, or Other**. This allows you to define a default for each of the types of Constituent maintenance form

Update/Delete	
Link	▶
Link to Existing	▶
Unlink	▶
Display	▶
Options	▶
Help	

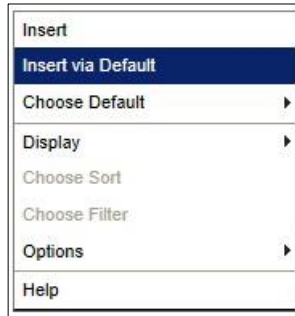
Define Default	▶
Reset Password	

Person
Corporation
Other

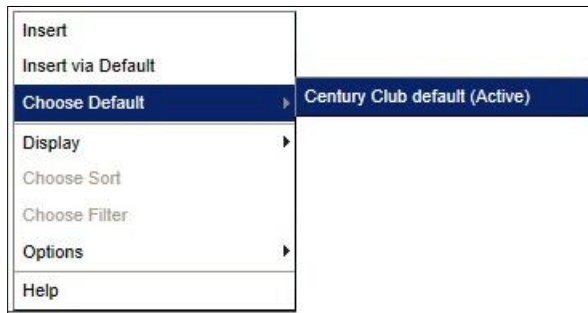
Using a Default Form during Input

There are three ways default forms can be accessed in data input:

- Perform a search for the first constituent and display the appropriate table. Access the context menu and select **Insert via Default**.



- Perform a search for the first constituent and display the appropriate Table. Access the context menu and **select Choose Default > [select appropriate default from drop down list]**.



NOTE: When a default is selected from the drop down list of all available defaults, the selected default will automatically become the active default.

- After you set up the default through the process described earlier, you can access your active default through the *Shift - V* hotkey combination.

Let's enter our first Attribute through a default insert form for Clark Kent using the first method.

Display Clark's **Attribute Table**.

Access the context menu.

Select **Insert via Default** to input using the Default Form.

The columns are already filled in for us based on our Default Form definition.

Click **Insert** to enter the Attribute row.

Repeat the process for Lois Lane, Jeff Shure and Kathy Shure.

Nice! This could really save some typing, couldn't it?



TIP: Abila Millennium provides a utility (Add Attribute) that will enter Attribute rows for a large group of constituents all in one step. You must be able to select the constituents, based upon some common characteristics, using the Abila Millennium Reporter. Contact your system administrator for more information about the Add Attribute utility.

Storing, Editing and Deleting Default Forms

Once a user establishes Default Forms for a particular table, those Default Form are automatically and permanently stored for that user. Every time the user logs

into Abila Millennium, the Default Forms will then become available for use in data entry.

In this way, each individual user can maintain his or her own set of Default Forms without interfering with the data entry process of any other user.

The process for editing an established Default Form is exactly the same as defining one.

Right click to access the context menu for the appropriate table.

Select **Define Default**.

Edit the **Default** form.

Click **Update**.

The difference will be that the Default Form Maintenance form will display the information from the existing Default Form rather than completely blank columns. You may then make any changes necessary to the included columns in the Default Form.

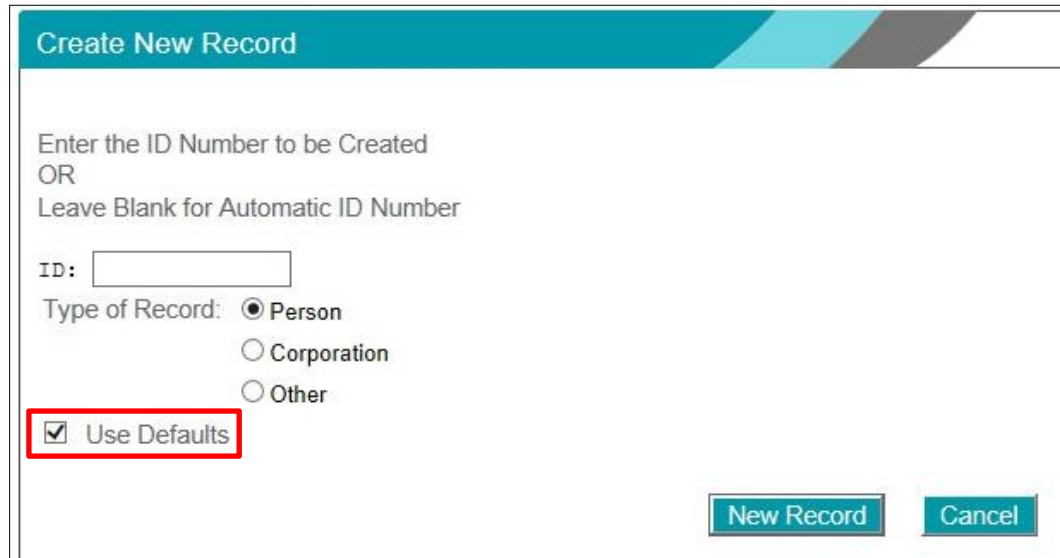
To delete a Default Form, press the options button for the appropriate table, select Set default and press the **Delete** button.

Using Default Forms to Enter Constituents

You may find it helpful to establish Default Forms for the Basic Data, Name and Address Tables that will assist you in entering a batch of constituents with common information.

Take the example of the graduating class of 1996. In each case, the Constituency Type (Alumni), Preferred Year (1996), Name Type (Preferred), Address Locator (Good), Address Type (Home) and Address Utilization (Preferred) columns may be entered into Default Forms to save keystrokes in data entry.

To use Default Forms in entering constituents, establish Default Forms for the Basic Data, Name, and Address Tables and check the Use Defaults checkbox in the Create New record form.



Create New Record

Enter the ID Number to be Created
OR
Leave Blank for Automatic ID Number

ID:

Type of Record: Person
 Corporation
 Other

Use Defaults

Once you check this box, when the system takes you through the first three tables in data entry, the Default Form Maintenance forms will be displayed.

One other important point we'd like to make. . .

We highly recommend the creation and use of Default Forms for each of Abila Millennium's Data Tables, particularly in the case where certain Columns will display the first entry from a lookup table (i.e. Address Locator = deceased, etc.).

This will help to avoid any accidental entries of the wrong information!

Notes

AS 102 Biographical Data Entry

Final Exam

Instructions

Take as much time as you need to complete the exam, referring back to the previous sections if you need to refresh your memory.

In order to receive your Certificate of Completion for this workbook, complete, scan and email this exam, along with the printouts, to:

Training.nonprofit@abila.com

Associate's Degree

As a general guideline, **all** Staff should complete AS 101 and AS 102.

In addition, those working with Gifts should complete AS 103, and Donor/Prospect Research Staff should complete AS 104.

If you have any questions about the exam or the materials presented in this workbook, please contact your Abila Millennium System Administrator or call our Training Department at 1-877-879-0456.

Name: _____

Job Title: _____

Date: _____

Organization: _____

1. When entering a new constituent into Abila Millennium, the best first step is to perform a _____. This will ensure that the constituent you are about to create does not already exist in your database.
2. When you opt to Create a New Record, Abila Millennium will prompt you to enter data for the constituent in three tables. In order, these are _____, _____ and _____.
3. As you are doing data entry, you will notice that the columns in the tables may be either _____ or _____.
4. If a column is _____ that will be denoted by the presence of a down arrow to the right of the column. A down arrow indicates that a drop-down list of pre-specified choices is available.
5. In Abila Millennium, create a Constituent using the following information for the Basic Data table:

Constituent Type:	Alumni
Birthday:	August 19, 1975
Sex:	Female
Preferred Year:	1997
CAE Category:	Alumni
Source:	Self
Marital Status:	Single
Children:	None
Preferred School:	Arts and Sciences
Ethnic Group:	Caucasian
Birth Country:	England
Default Account:	Journalism Projects
Title:	Very Important Donor

In the Name table enter the following:

Title:	Ms.
First:	Holly
Middle:	Marie
Last:	Jackson
Lookup:	Checked
Type:	Preferred
Source:	Self

In the Address table enter the following:

Address:	128 Hidden Lake Drive
City:	Providence
State:	Rhode Island
Zip:	02918
Country:	USA
Locator:	Good
Type:	Home
Phone:	(401) 777-7777
Start:	Jan 15, 1998
Utilization:	Preferred, Alumni Magazine

6. In User Options, set your Define Display so that the Basic Data, Name and Address tables are displayed in that sequence. Add Citizenship data and a Cell Phone number for Holly Jackson.
7. When creating a Constituent that is a Corporation, the entire name should be entered in the _____ field of the Name table.

8. Create a Constituent that is a Corporation, with the name of Marketing Concepts, Inc. In the Basic Data table of Marketing Concepts, Inc., designate the Corporation as a Matching Company with a matching ratio of:
 - 2:1 for all gifts up to \$50,000,
 - 1:1 for all gifts of \$50,000 to \$1,000,000.
9. Print the Basic Data, Name and Address tables for Marketing Concepts, Inc., and attach it to this Final Exam document (to be returned to Abila Software).
10. Go to the Employment Table of Holly Jackson, and **Insert** the following information:

Firm:	Marketing Concepts, Inc. or the ID number of Marketing Concepts, Inc.
Title:	Director of Community Relations and E Commerce
Occupation:	Marketing
Begin:	Feb 1, 1998
Status:	Active
Source:	Self

11. In Holly's Employment Table, the employer name appears as a _____ because Marketing Concepts, Inc. is a _____ on Abila Millennium.
12. Information on Holly's educational history including universities attended, degrees received, degree years and concentrations should be stored in the _____ Table.
13. Do a Constituent Search on Jeff R. Shure, and go to his Attributes Table. Observe Jeff's attributes in Long display, and list three characteristics or interests that might be used as Attributes at your institution: _____, _____, and _____.
14. The most efficient way of simultaneously making Correspondence entries in the Tables of multiple Constituents is by using the Correspondence _____
15. When Holly Jackson informs us that she is married to Jeff Bertram, the first step will be to _____

16. In Basic Data, enter information for Jeff Bertram, listing Jeff's marital status as Single. Make sure that the first version of his name that is entered is designated as Lookup and Preferred, and give him a Good, Home Address that is Preferred.
17. Go to Holly's Relationships table, and indicate that Holly and Jeff were married on May 5, 2000.
18. Once the spouse Relationship has been created, the _____ button will appear on _____. In addition, Holly and Jeff's Basic Data tables will reflect the change in the _____ column.
19. In Abila Millennium, the _____ Table is used as the storage area for relevant information that must be entered as text.
20. The three Tables in which an Abila Millennium constituent can only have one row are _____, _____ and _____.
21. The Tables identified in the Profiles area of the Abila Millennium Explorer are considered _____ Tables.
22. To enter a Linked Attribute row into a constituent's Basic Data Table,

23. Match the Secondary Tables with the Primary Table to which they are attached. Remember that a Primary Table can have more than one Secondary Table.

Primary Tables	Secondary Tables
Basic Data (Persons)_____	A. Benefits
Gifts _____	B. Citizenship
Membership _____	C. Credit Card
Planned Giving _____	D. Gift in Kind
Address _____	E. Honoree
Research _____	F. Payments
	G. PG Ratings
	H. Phone Numbers
	I. Quid Pro Quo
	J. Ratings K. Receipts
	L. Research Sources
	M. Securities
	N. Solicitor
	O. Subscription

24. Describe the steps you will use to create an Attachment _____

25. To Edit or Delete a Row, you must _____

26. True or False: Linking a Spouse Address will create a Duplicate Row _____

27. Describe how to link a person's employment to his/her business address

28. The most common use of Default Forms is _____

although they can also be used to enter constituents.