The Raiser's Edge™

Alumni Data Entry Guide

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What Is In This Guide?

In the *Alumni Data Entry Guide*, you learn to contact, solicit, and better manage alumni (when you have the optional module *Alumni Tracking*). You can also learn about the following:

- "Basic Information on the School Tab" on page 12
- "Defining Education Attributes for Alumni" on page 13
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How Do I Use These Guides?

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

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

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

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

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

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

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Note: The optional module *Alumni Tracking* provides prepared reports to analyze and track your former students. For more information about these reports, see the *Reports Guide.*

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

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

Note: When you purchase optional modules from Blackbaud such as *Alumni Tracking* or *Event Management*, you are given a code. You must enter this code to "unlock" or activate the optional module. For more information, see the *Program Basics Guide*.

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

Frequently Used Terms

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

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

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

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

Constituent Code. A constituent code is a category you assign to a constituent in your database. This code helps you identify the relationship a constituent has to your organization. In other words, it defines why a constituent is in your database. You should assign at least one constituent code to each of your constituent records. For example, on the Bio 2 tab, you can assign the constituent code Alumnus to each constituent in your database who graduated or attended your school. This not only helps you identify a constituent as an alumnus, but later you can use these codes when querying your database for reports and mailings. You can set your user options so that the constituent code abbreviation appears on the record when opened. For example, the constituent code abbreviation AL (for Alumnus) will appear on the constituent record when opened.

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

GPA. GPA refers to the grade point average of your constituent. For example, the cumulative GPA for Melissa Elzy is a 3.4 on a 4.0 scale. Melissa's GPA is a reflection of her academic performance while in school. This information can be useful when soliciting for donations to academic organizations or clubs that your organization sponsors.

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

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

Navigating in Alumni Tracking

Note: When *MatchFinder* is installed on your computer, a **MatchFinder** button appears on the Records page. A **MatchFinder** button appears on the Org 1 tab of an organization record and on the General 2 tab of all organization relationship records. Also, if a constituent's matching gift is linked to a MatchFinder record, a **MatchFinder** button appears on the Matching Gifts screen of the Matching Gifts tab of the gift record. For more information about *MatchFinder*, see the *MatchFinder Guide*.

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

Accessing Alumni Information from the Constituent Bio 1 Tab

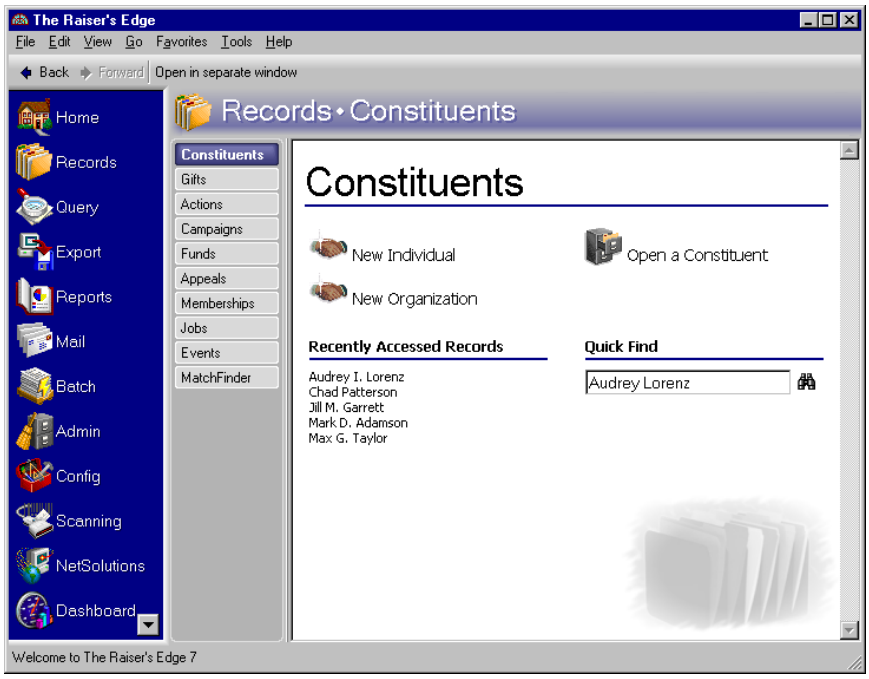
When you access alumni information from the Bio 1 tab, the Education/School screen appears with the primary education record (if one exists). Only one education record can be marked primary for each constituent. This helps you recognize the main or most recent education information for your constituent.

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

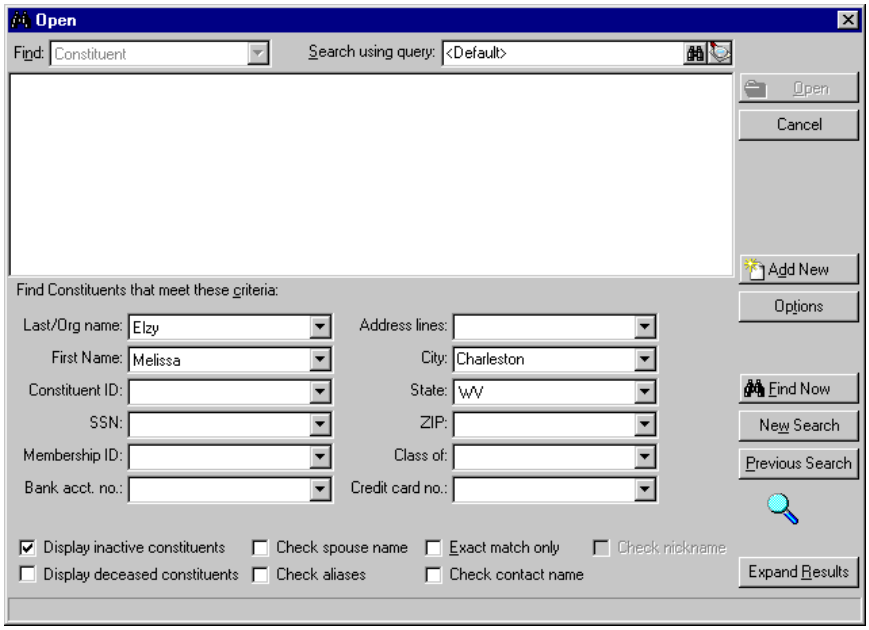
- **Accessing Education from the Bio 1 tab**

  1. On the Raiser's Edge bar, click **Records**.

2. Click **Constituents**. The Constituents page appears.



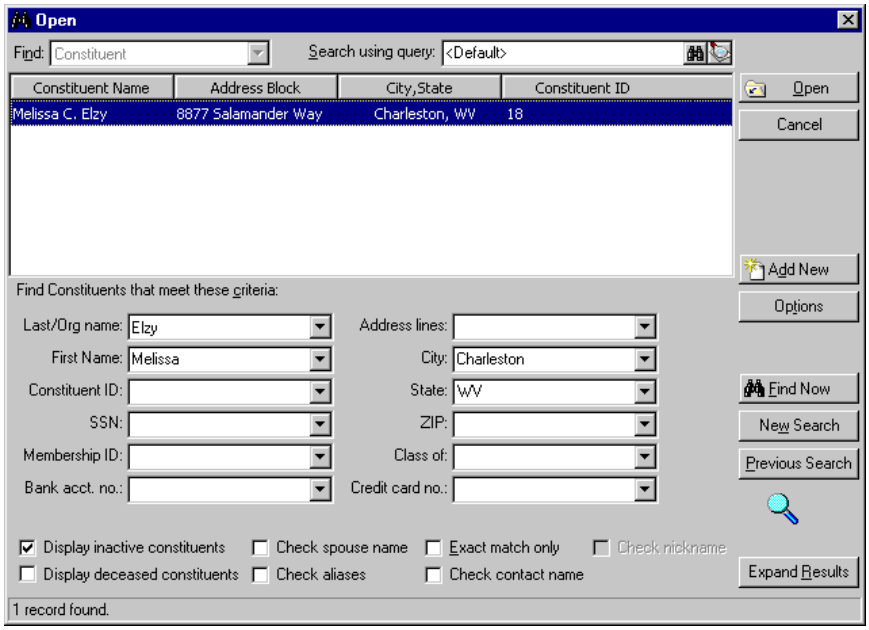
3. Click **Open a Constituent**. The Open screen for constituents appears.



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

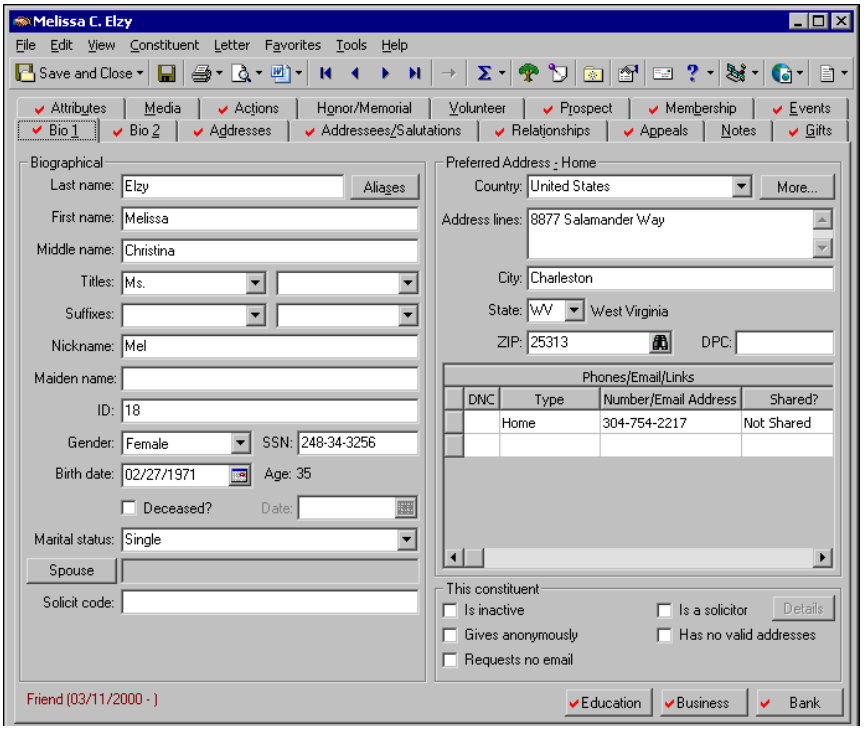
4. In the **Find Constituents that meet these criteria** frame, decide what criteria you want to use when searching for your constituent and enter the information in the appropriate criteria fields. The criteria you can use include the constituent's first or last name, ID, Social Security Number, membership ID(if the optional module *Membership Management* is installed), bank account number, address lines, city, state, ZIP, class of format, and credit card number.

5. Click **Find Now**. If the search criteria you entered matches a constituent in the database, it lists in the grid on the screen. Depending on how limited or detailed your criteria are, the program may find one or many records.

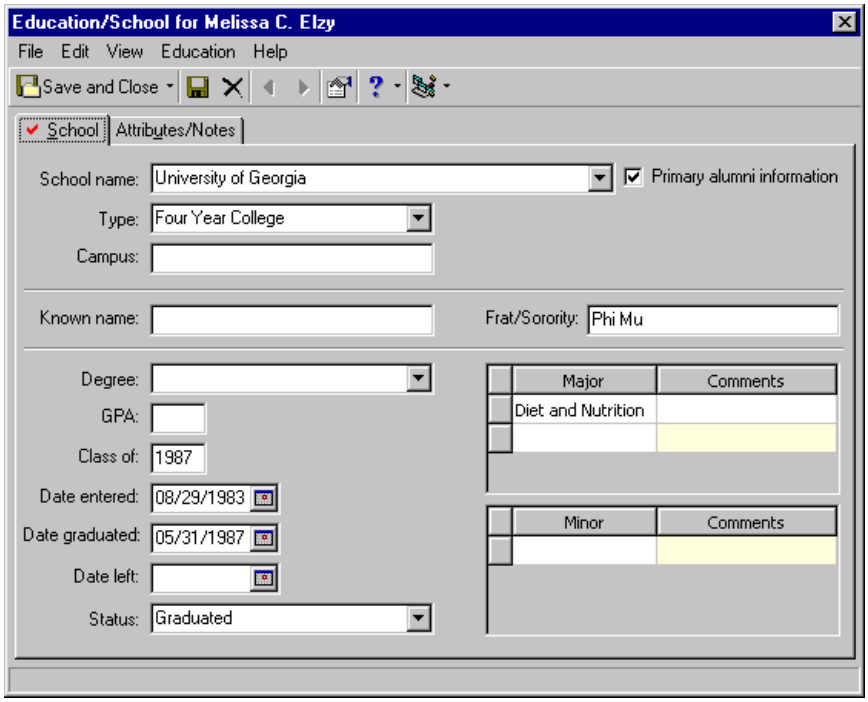


Warning: We recommend you search by one or two of the most helpful criteria types because the results that appear in the grid must match all criteria you enter. Adding too much criteria information in the **Find Constituents that meet these criteria** fields can actually prevent you from finding a constituent.

6. In the grid, highlight the constituent whose record you want to open.
7. Click **Open**. The constituent record appears.



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



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

Accessing Alumni Information from the Constituent Relationships Tab

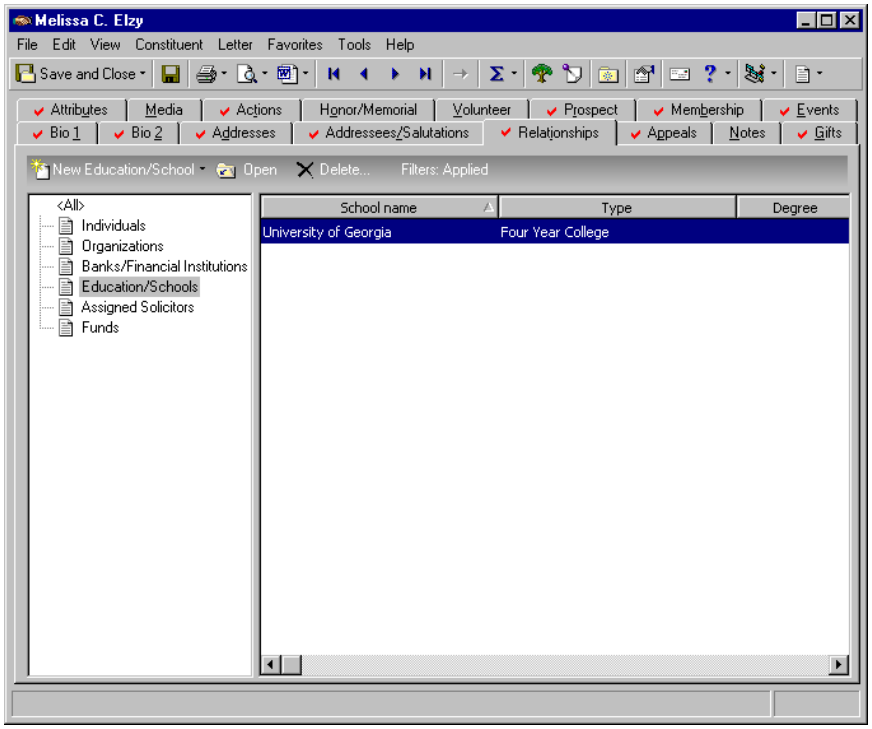
From the Relationships tab, you can add or change education information for your constituent relationships. If no other education record is marked as primary, you can mark the **Primary alumni information** checkbox as primary from the Relationships tab.

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

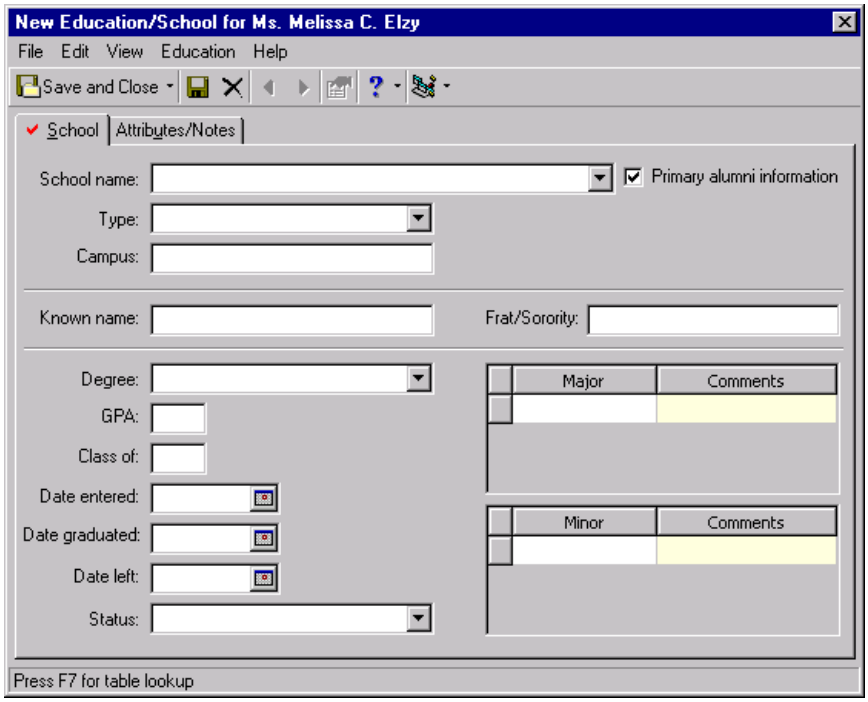
▸ **Accessing alumni information from the Relationships tab**

Note: You can maximize and resize your constituent records.

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



2. From the tree view on the left, select **Education/Schools**.
3. On the **action bar**, click **New Education/School**. The New Education/School screen appears.

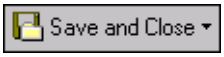


Note: You can set up a user option that enables you to view tooltips that explain the function of each toolbar command. Tooltips appear when you move your cursor across each item on the toolbar. For more information about setting up this user option, see the User Options chapter of the *Program Basics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

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

Education/School Screen Toolbar

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



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

Save the record

Delete the record

Go to the previous education record of the current constituent

Go to the next education record of the current constituent

View education record properties

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

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

User Options for Alumni

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

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

Business Rules for Alumni

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

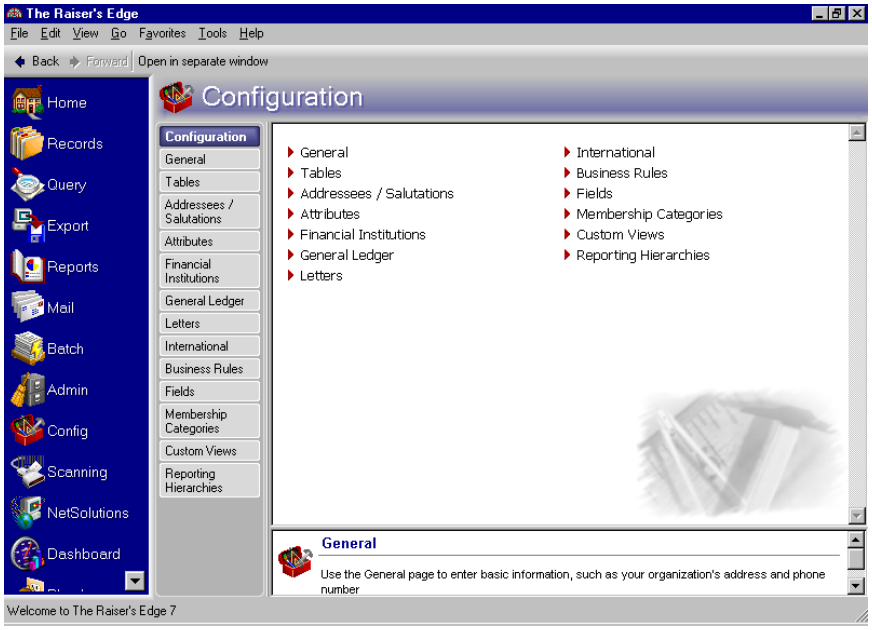
Note: Defaults are guidelines you set up to simplify data entry. When a program defaults information in a field, you can change the information by selecting the text and typing over it with the correct entry.

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

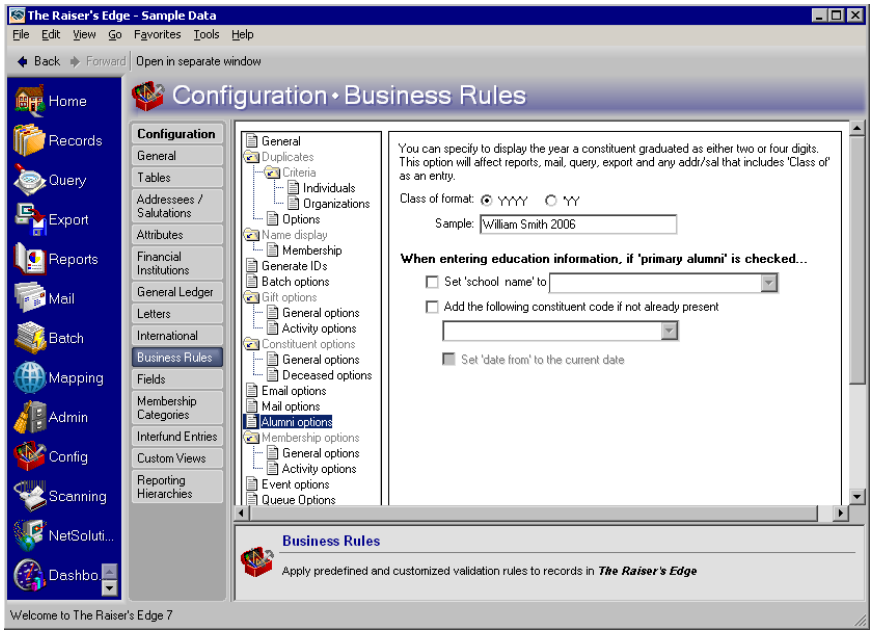
You can set business rules only if you have appropriate security rights established from the **Security** link of *Administration*. For more information about setting business rules, see the *Configuration & Security Guide*.

Defining the Class of business rule

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



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



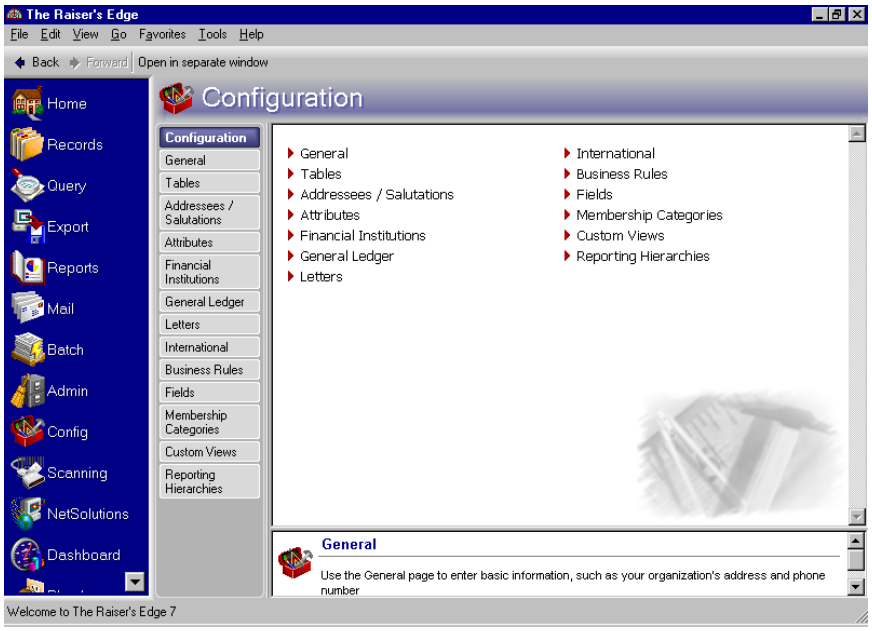
3. From the tree view on the left, select **Alumni options**. The alumni options appear on the right.
4. You can select how you want the Class of date to appear on records, mail, and reports. You can select the options **YYYY** or **YY** for **Class of format**.

   For example, if you select the option **YYYY** for the year 2006, the year format appears as 2006. If you select the option **YY**, the year format appears as '06.

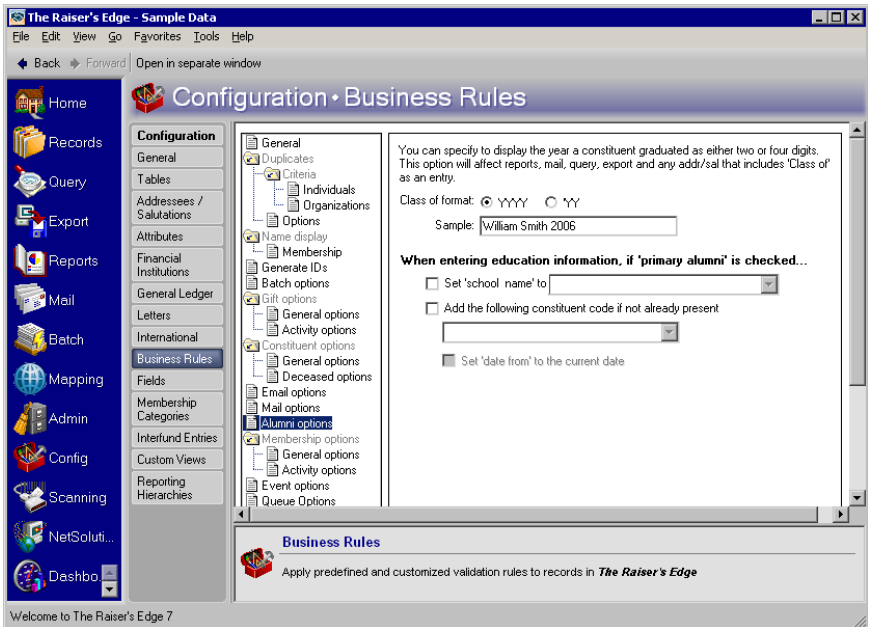
   The default you set appears in any record containing the **Class of** field.

Defining alumni school/college business rules

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



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



3. From the tree view on the left, select **Alumni options**. The alumni options appear on the right.

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

4. Mark the **Set 'school name' to** checkbox and select your school name in the adjacent field.
5. If you want to add a constituent code defining why the constituent is in your database, mark the **Add the following constituent code if not already present** checkbox.

   Adding constituent codes to your constituent alumni records helps you understand the relationship that constituent has to your organization. For example, you can select "Alumnus" as your default constituent code to appear on all new constituent records. This code designates that these new constituents are alumni of your organization. When using the VSE survey report, the constituent code "Alumnus" takes precedence over any other code. If "Alumnus" is not listed first in a record's list of constituent codes, but is present, the donor is still counted as an Alumnus in the VSE survey report. For more information about the VSE survey report, see the *Reports Guide*.
6. When you mark **Add the following constituent code if not already present checkbox**, the **Set 'date from' to the current date** checkbox is enabled. Mark this checkbox if you want the date you add the constituent to your database to appear in the **Date From** column in the **Constituent Codes** grid on the constituent record's Bio 2 tab.

   The defaults you set here appear on the screen when the **Primary alumni information** checkbox is marked.

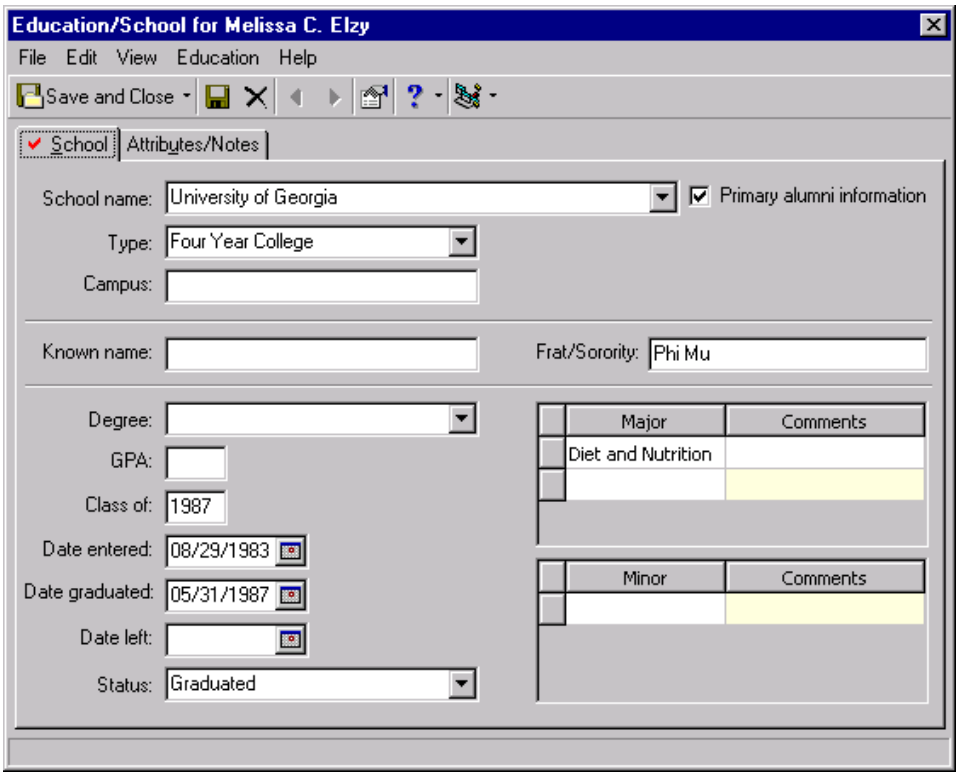
Overview of Alumni Information

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

Basic Information on the School Tab

The School tab stores basic alumni details for your constituents. With the optional module *Alumni Tracking*, you have the option to mark a constituent education record as primary. This option helps you organize which school you want to be the “primary”, or main school, for the constituent. You can mark only one education record as primary for each constituent.

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

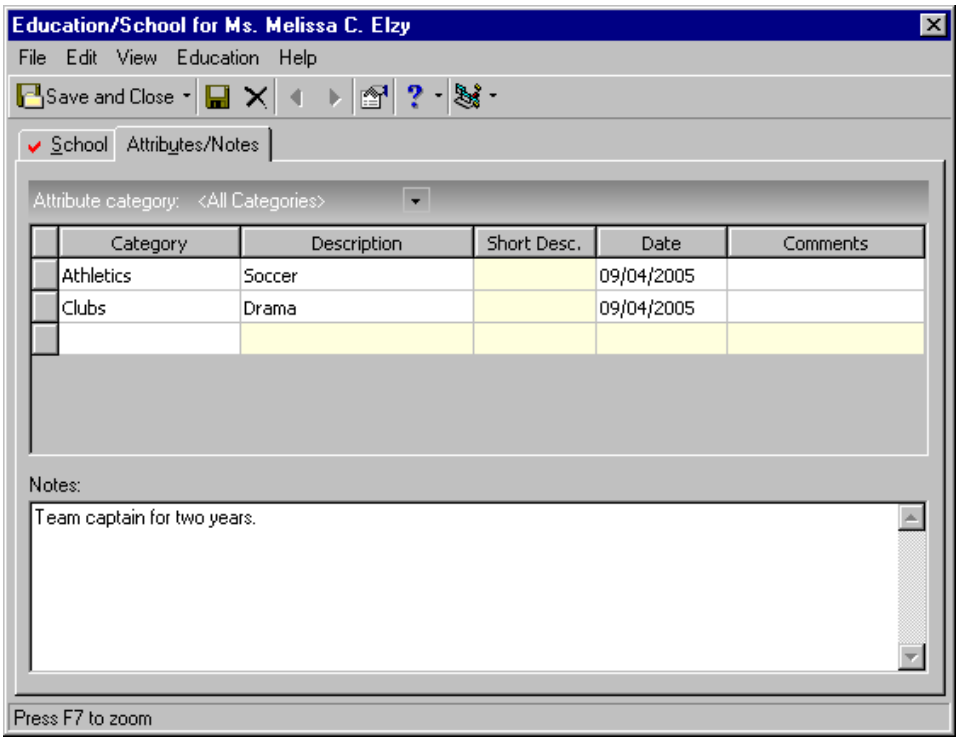


Warning: Remember to use either the **Date graduated** field or the **Date left** field, but not both.

You can specify the degree, class of, and the GPA (grade point average) of your constituent. The **Date entered**, **Date graduated**, **Date left**, and **Status** fields help you track when a constituent enrolled and if they graduated or left before graduating. Tracking a constituent’s major and minor is useful when you are ready to solicit them for specific campaigns or funds.

Additional Alumni Information

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



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

Defining Education Attributes for Alumni

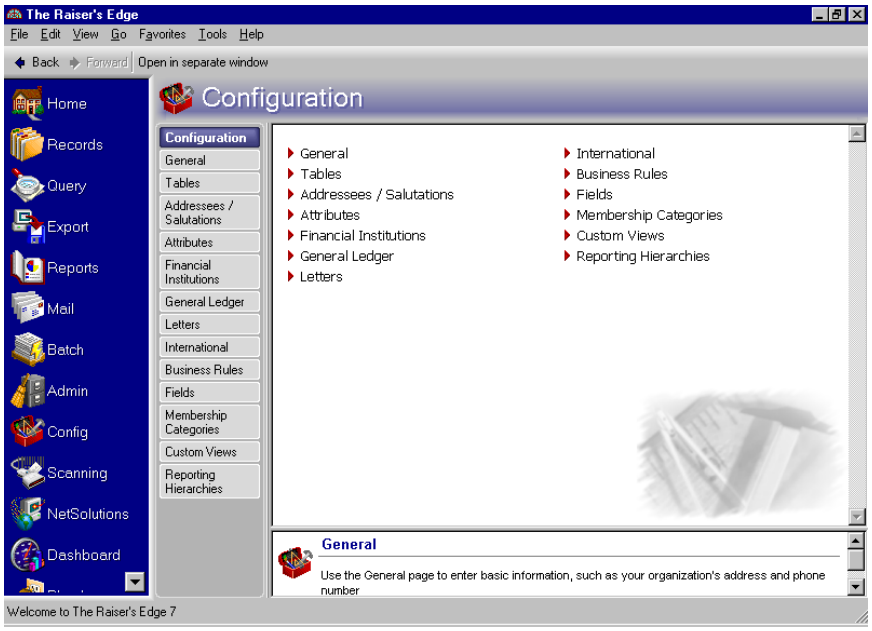
Before you begin adding constituent alumni information, you need to understand how attributes work. Attributes are useful bits of information you can attach to a record. Because you create attributes, you can use them to customize ***The Raiser's Edge*** to suit your school's specific needs. Attributes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

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

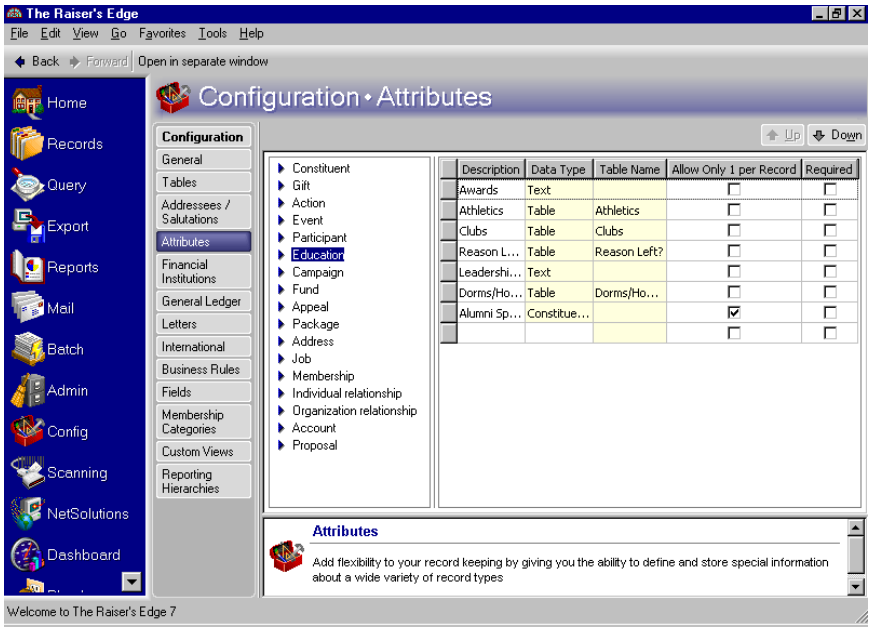
Defining education attributes

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

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



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



3. From the tree view on the left, select **Education**. The Education Attributes grid appears on the right.
4. In the **Description** column, enter a description for the attribute category. The description for the attribute appears in the Education/School screen on the Attributes/Notes tab under **Category**.

5. In the **Data Type** column, select the format in which you want the data stored. You can set your attributes to appear in the form that best suits the needs of your organization. Your choices are Text, Number, Date, Currency, Yes/No, Table, Constituent Name, and Fuzzy Date. For more information about these formats, see the *Configuration & Security Guide*.

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

6. In the **Table Name** column, you can specify the table name that holds your data if you select Table in the **Data Type** column.
7. If you want to allow only one attribute of this type to be added per record, mark the checkbox in the **Allow Only 1 per Record** column of that attribute row.

   For example, if you have an attribute **Description** of "Advisor" that tracks the faculty member who advises a student during the school year, you would mark the checkbox in the **Allow Only 1 per Record** column of that attribute row to indicate each student is assigned only one advisor.
8. If you want to require that the attribute be entered on all alumni records, mark the checkbox in the **Required** column of that attribute row.

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

   For example, if you have an attribute **Description** of "Advisor" that tracks the faculty member who advises a student during the school year, you need to mark the checkbox in the **Required** column of that attribute row to indicate that each student must have an advisor.
9. Use the **Up** and **Down** buttons in the upper right corner to arrange the attributes in the order you want them to appear on the education record. Do this by selecting the row you want to move and clicking the **Up** or **Down** button.

Managing Alumni Information

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

Primary Alumni Information

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

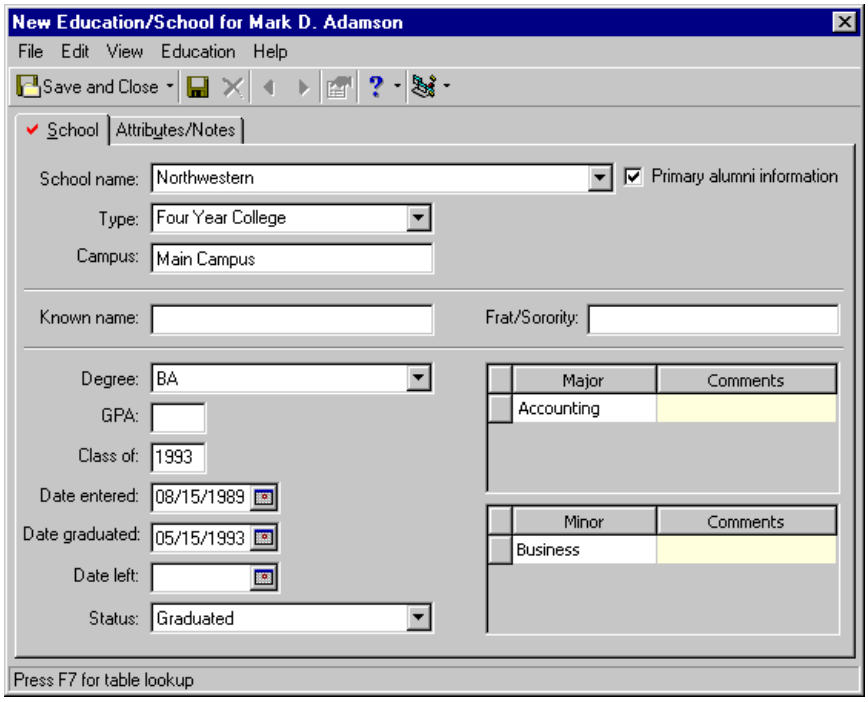
If no primary education record exists, a blank education screen appears so you can add new constituent education information.

Adding primary alumni information from the constituent Bio 1 tab

Scenario: Your organization received Mark Adamson's alumnus information from a questionnaire sent out earlier this month. In the questionnaire, Mark included information about his extracurricular and athletic activities that he participated in while in school. Add Mark's alumnus information to his constituent record.

Note: We recommend marking the **Primary alumni information** checkbox on the education record relating to your organization. This way, the constituent appears in your alumni reports.

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



3. Select the School tab.
4. In the **School name** field, select "Northwestern".
5. In the **Type** field, select "Four Year College".
6. In the **Campus** field, enter "Main Campus".

Note: You can add additional school names by clicking in the **School name** field and pressing **F7**.

7. Mark the **Primary alumni information** checkbox because Northwestern is the primary school Mark Adamson attended. This is his main, or primary, school information.
8. In the **Degree** field, select "BA".

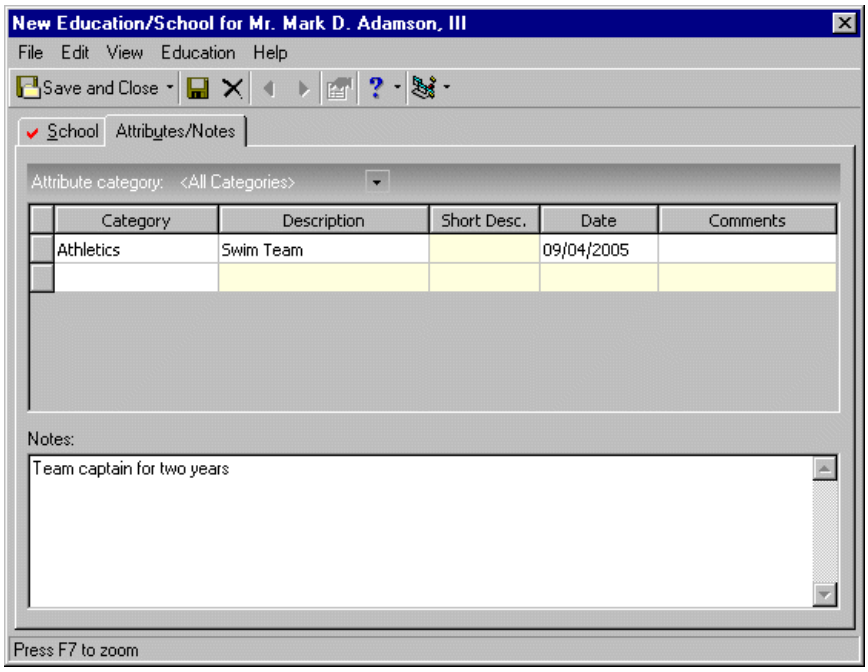
Note: The **Class of** format is established in the Business Rules section for Alumni in *Configuration*. For detailed information, see the *Configuration & Security Guide*.

9. In the **Class of** field, enter "1993".
10. In the **Date entered** field, enter the date 08/15/1989.

11. In the **Date graduated** field, enter 05/15/1993.
12. In the **Status** field, select “Graduated”.
13. In the first empty row of the **Major** column, select “Accounting”.

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

14. In the first empty row of the **Minor** column, select “Business”.
15. Select the Attributes/Notes tab.



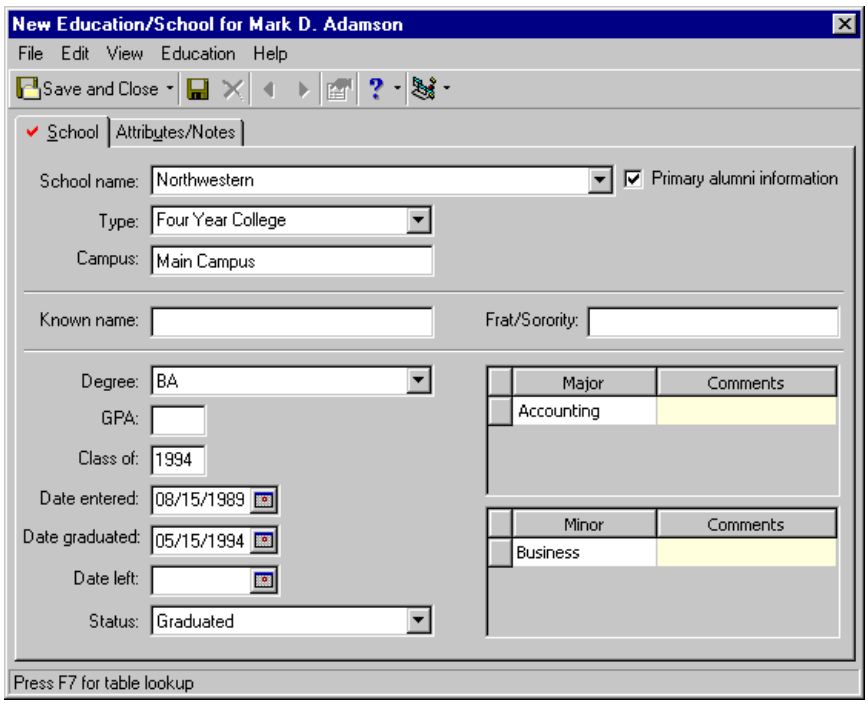
Note: When you set up your attributes in *Configuration*, and you select an attribute that contains a short description, the **Short Desc.** column on the Attributes/Notes tab is then enabled.

16. In the first row of the **Category** column, select “Athletics”.
17. In the first row of the **Description** column, select “Swim Team”.
18. In the first row of the **Date** column, enter today’s date because you are entering Mark’s attribute information today.
19. Click **Save and Close** on the toolbar. You return to the Bio 1 tab of Mark Adamson’s record.

Editing primary alumni information from the constituent Bio 1 tab

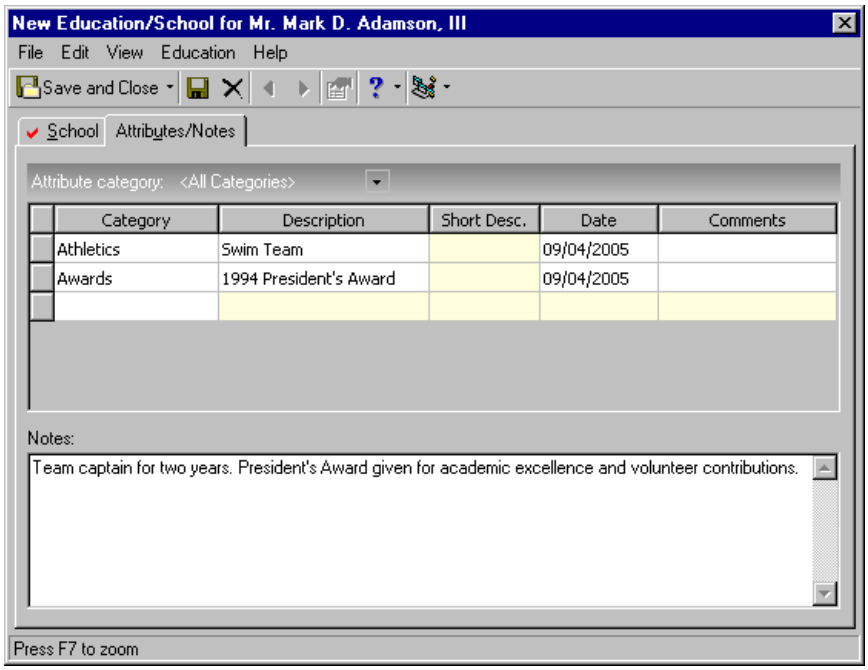
Scenario: You are updating your alumni information and realize that Mark Adamson's graduation date was 1994 instead of 1993. You also find out that Mark was awarded Northwestern's 1994 President's Award. This award is given to a graduating senior who has contributed time and effort to the university and surrounding community through volunteering, while maintaining high academic excellence. Add these changes to Mark's record.

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



3. In the **Date Graduated** field, change Mark's graduation date from 05/15/1993 to 05/15/1994.
4. In the **Class of** field, change Mark's class of date from 1993 to 1994.

5. Select the Attributes/Notes tab.



6. In the second row of the **Category** column, enter “Awards”.
7. In the second row of the **Description** column, enter “1994 President’s Award”.
8. In the second row of the **Date** column, enter today’s date because you are entering Mark’s attribute information today.
9. In the **Notes** grid, enter “President’s Award given for academic excellence and volunteer contributions.”
10. Click **Save and Close** on the toolbar. You return to the Bio 1 tab of Mark Adamson’s record.

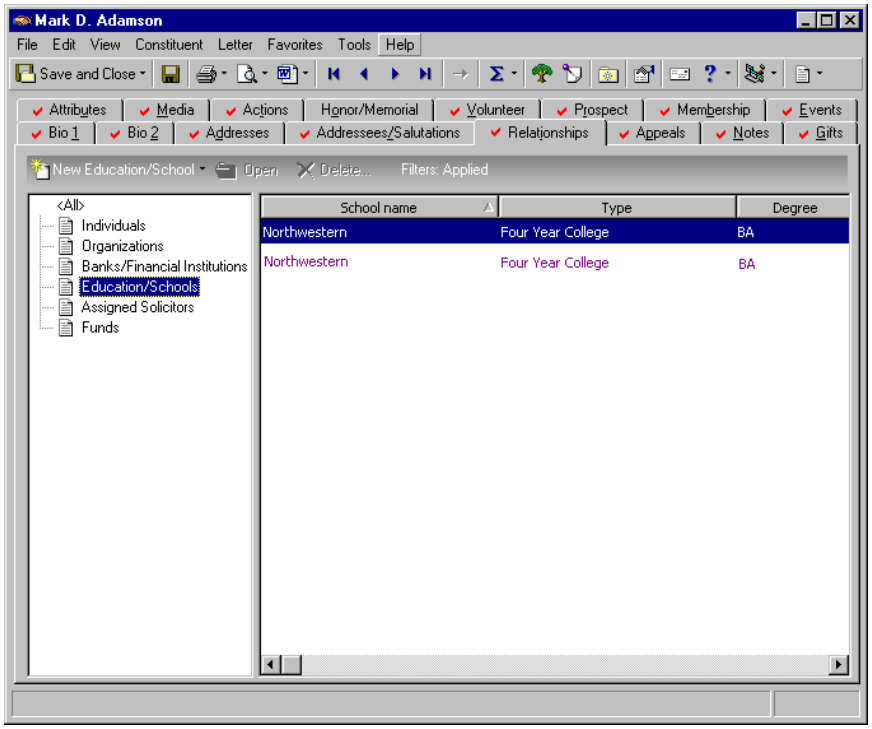
Deleting primary alumni information from the constituent Bio 1 tab

You can delete primary alumni information from the Bio 1 tab by opening the education record from the Bio 1 tab and clicking the **Delete** button on the taskbar. For more information about opening an education record from the Bio 1 tab, see "Accessing Education from the Bio 1 tab" on page 3. However, we suggest deleting education records from the Relationships tab of a constituent record. This way, you can view all education information for a constituent to ensure that you are deleting the correct record.

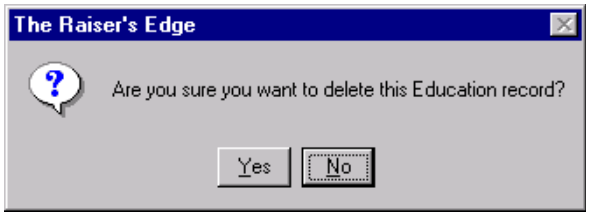
Deleting a constituent education/school record is permanent. We suggest you print the information first to keep as a record.

Scenario: You are editing a date on Mark Adamson's education record. You notice that his primary education record, Northwestern, has been mistakenly entered twice: once as a primary education record and once as an additional education record. You know that Northwestern is Mark's primary education record, so you need to delete the additional education record.

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



2. From the tree view on the left, select **Education/Schools**. You can now view all education information for Mark.
3. Highlight the additional education record for Northwestern and click **Delete**.
4. A message appears confirming your wish to delete the education/school record from your database.



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

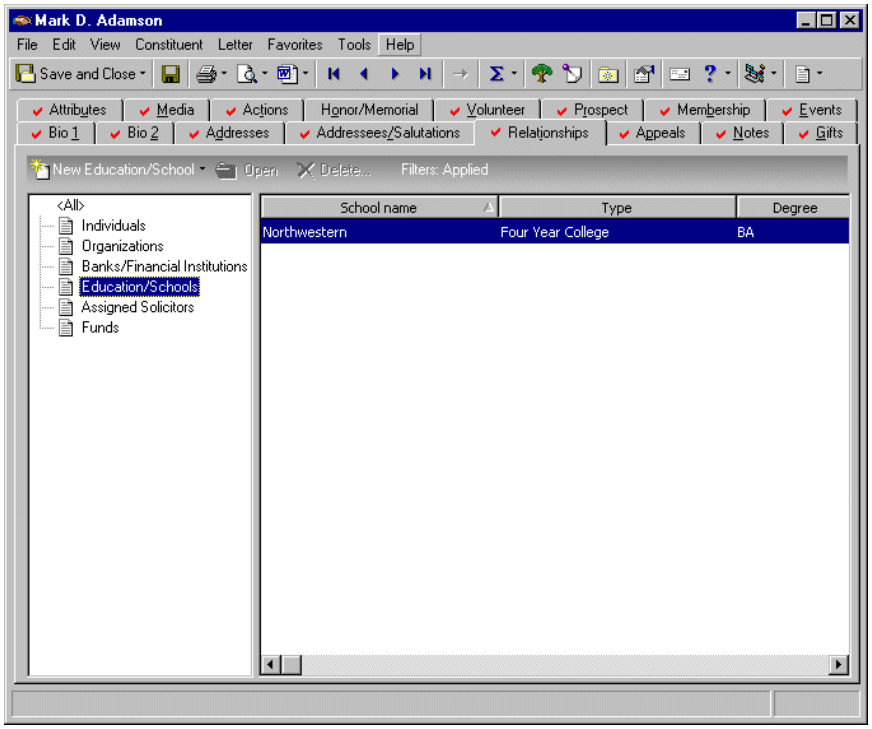
Additional Alumni Information

Adding additional alumni information through the Relationships tab

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

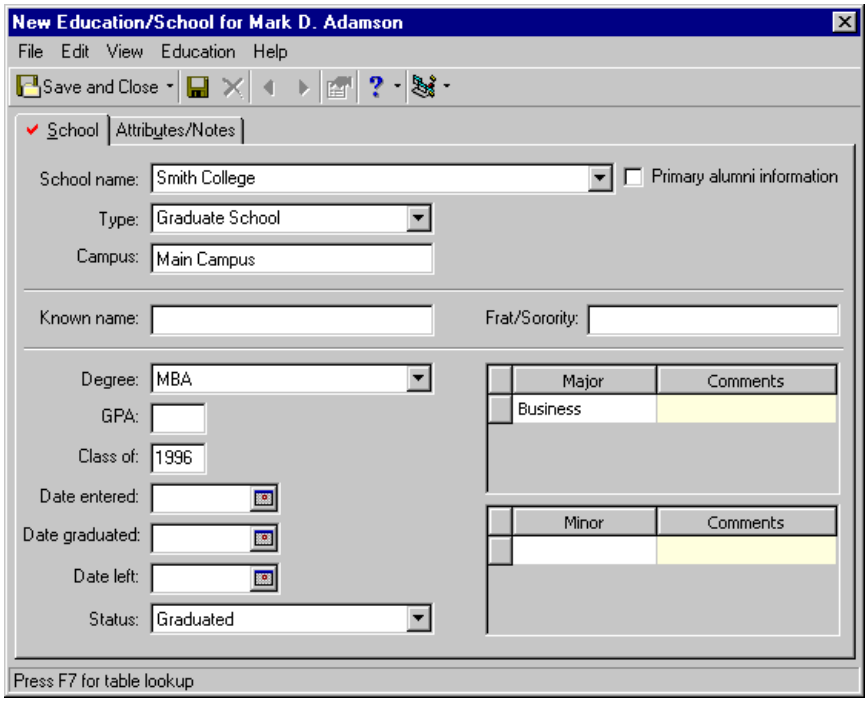
Scenario: Mark Adamson attended the graduate school business program at Smith College. Your school has an Education Fund that helps support area businesses in teaching business-writing seminars to local high schools. Mark is a prospect for donating to this fund. Add Mark's additional alumni information.

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



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

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



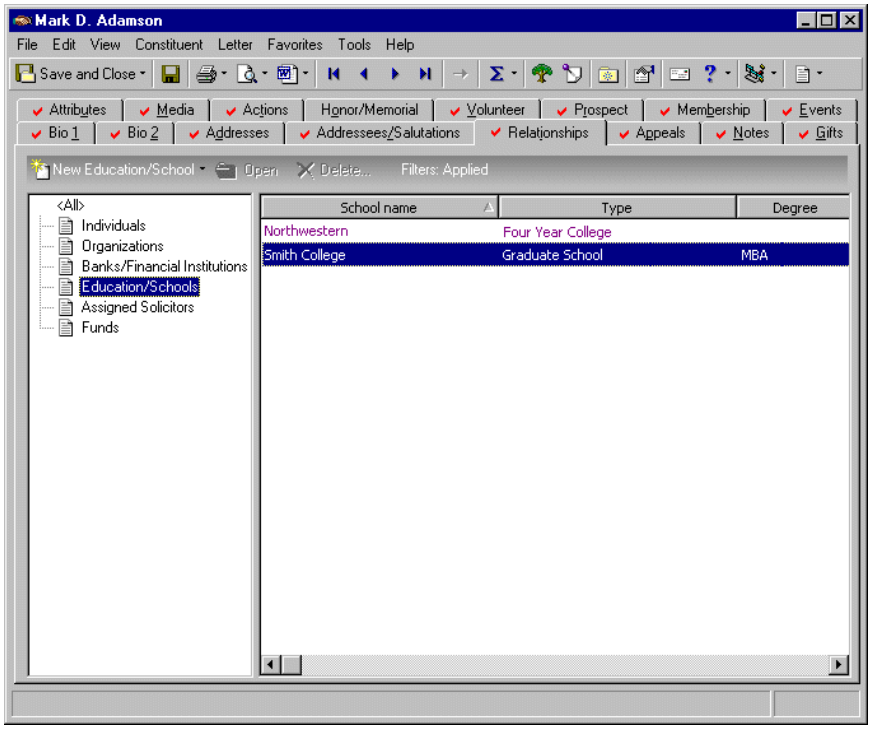
4. From the New Education/School screen, select the School tab.
5. In the **School name** field, select “Smith College”.
6. It is unnecessary to mark the **Primary alumni information** checkbox because you already designated Northwestern as Mark’s primary education record.

   If you mark the **Primary alumni information** checkbox here, a message appears asking you to select either Northwestern or Smith college as Mark’s primary education record because only one education record can be the primary education information for a constituent.
7. In the **Type** field, select “Graduate School”.
8. In the **Degree** field, select “MBA”.
9. In the **Class of** field, enter “1996”.
10. In the **Status** field, select “Graduated”.
11. In the first row of the **Major** column, select “Business”.
12. Click **Save and Close** on the toolbar. You return to the Relationships tab of Mark Adamson’s record.

Editing additional alumni information from the constituent Relationships tab

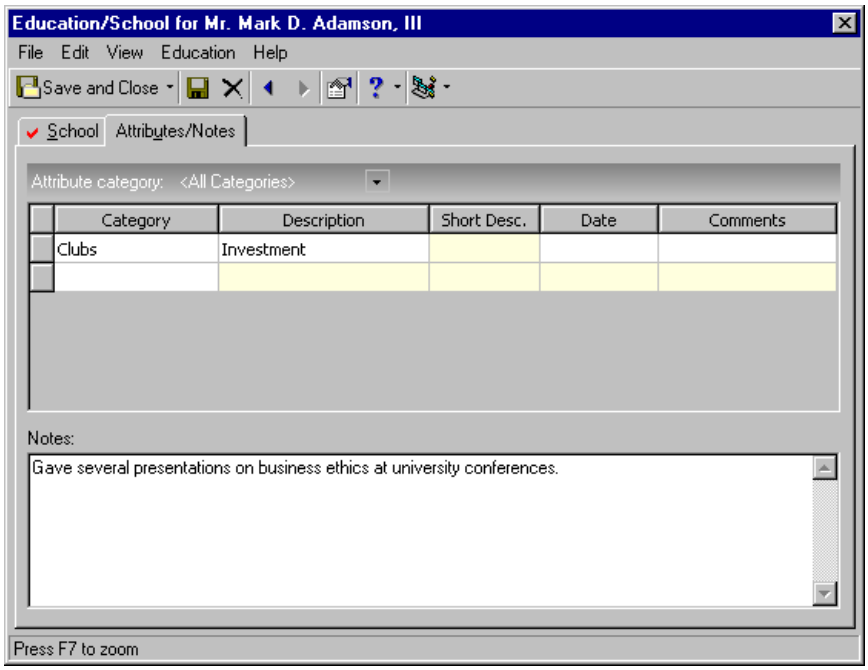
Scenario: You recently found out that Mark Adamson was president of the Investment club while a graduate student at Smith College. You also learn that he gave presentations on business ethics at numerous university conferences. Add the new information to Mark's alumnus record.

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



2. From the tree view on the left, select **Education/Schools**.
3. Highlight the education record for Smith College and click **Open**.

4. Click the Attributes/Notes tab.



5. In the first row of the **Category** column, select “Clubs”.

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

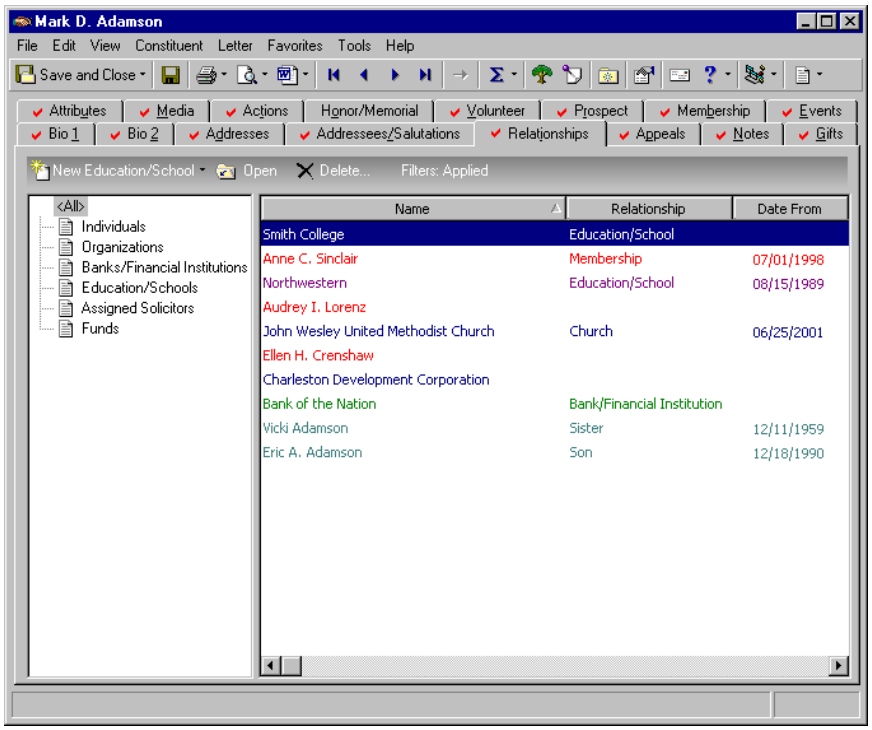
6. In the first row of the **Description** column, select “Investment”.
7. In the **Notes** grid, type “Gave several presentations on business ethics at university conferences.”
8. Click **Save and Close** on the toolbar. You return to the Relationships tab of Mark Adamson’s record.

Deleting additional alumni information from the constituent Relationships tab

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

Scenario: You are cleaning up your ***Raiser's Edge*** database. You realize you added the wrong school to Mark Adamson's education record. He did not attend Smith College's graduate school. Delete the Smith College information from Mark's education record.

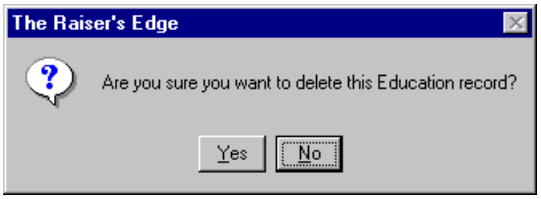
1. From Mark Adamson's constituent record, select the Relationships tab. For more information about opening a constituent record, see "Navigating in Alumni Tracking" on page 3.



2. From the tree view on the left, select **All**. You can now view all relationship information for a constituent.

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

3. Select the education record for Smith College and click **Delete**.
4. A message appears confirming your wish to delete the education/school record from your database.



5. Click **Yes**. The record for Smith College is permanently deleted from your database and you return to Mark's Relationships tab.

Education/School Records for Individual Alumni Relationships

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

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

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