

Train the Trainer Modules: Alumni Management

7.2.6 Manage Alumni Registration

➤ How to Run Graduates to Alumni Process?

Following are the requirements for running the Alumni process :

Execution Steps:

Step 1: Login with the KSAU sample users for this process [Sample User = "KS_DAR", Password = "123"]

Step 2: Go through with this navigation [Contributor Relations ->Constituent Information ->People ->Process Biodemo Information ->Graduates to Alumni]

Step 3: On the "Find an Existing Value" tab, click "Search" to display the list of existing Run Control IDs. Click on a search result row to open the "Graduates to Alumni" page.

OR

Click on the "Add a New Value" tab, enter the new Run Control ID and click "Add" to open the "Graduates to Alumni" page.

Step 4: On the run control page, enter the following values:

Academic Institution: KSAU

Academic Career: Select the value from the drop down list.

Completion Term: Select the value from the lookup box.

Step 6:Click "Save".

Step 7:Click "Run" and select "Graduates to Alumni" check box and click "OK". Then wait for the process to complete. This will add constituent type of alumni to student record.

➤ How to Maintain Alumni Biographical Information?

Following are the requirements for maintaining Alumni Biographical Information :

Execution Steps:

Step 1: Login with the KSAU sample users for this process [Sample User = "KS_DAR", Password = "123"]

Step 2: Go through with this navigation [Contributor Relations ->Constituent Information ->People -> Biographic Information -> Addresses]

Step 3: On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

Step 4: Enter the following values:

Effective Date: Enter the effective date of the address.

Status: "Active"

Country: Select the appropriate value form the list.

Add Address Type: Select the appropriate check box.

Then click on "Edit Address" and enter the following values:

Address 1: Enter address detail of person

City: Enter city of person address.

Step 5 :Click "Save".

Step 6 : Then click on "Submit" button and this will update biographical information.

Add/Update Alumni Names

Step 7 : Go through with this navigation [Contributor Relations ->Constituent Information ->People -> Biographic Information -> Names]

Train the Trainer Modules: Alumni Management

7.2.6 Manage Alumni Registration

Step 8: On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

Step 9: Enter the following values:

Effective Date: Enter the effective date of the address.

Status: "Active"

First Name: Enter First Name.

Last Name: Enter Last Name.

Step 10: Click "Save".

Add/Update Alumni Phones

Step 11: Go through with this navigation [Contributor Relations ->Constituent Information ->People -> Biographic Information -> Phones]

Step 12: On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

Step 13: Enter the following values:

Phone Type: Enter Phone Type.

Phone Number: Enter phone number.

Step 14:Click "Save".

Add/Update Alumni Electronic Address

Step 15:Go through with this navigation [Contributor Relations ->Constituent Information ->People -> Biographic Information -> Electronic Addressess]

Step 16:On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

Step 17: Enter the following values:

Email Type: Enter the effective date of the address.

Email Address: "Active"

Step 12: Click "Save".

➤ How to Maintain Alumni Personal Information?

Following are the requirements for maintaining Alumni Personal Information:

Execution Steps:

Step 1: Login with the KSAU sample users for this process [Sample User = "KS_DAR", Password = "123"]

Step 2: Go through with this navigation [Contributor Relations ->Constituent Information ->People -> Personal Attributes -> Photo]

Step 3: On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

Step 4: Then "Click" on "+" sign. Click "Choose File" and select file from your directory in JPEG format.

Step 5 :Click "Upload" and then click "Save". This will upload Photo information in the system.

Add/Update Alumni Religious Preference

Step 6 : Go through with this navigation [Contributor Relations ->Constituent Information ->People -> Personal Attributes -> Religious Preference].

Train the Trainer Modules: Alumni Management

7.2.6 Manage Alumni Registration

Step 7 : On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

Step 8: Select Religious Preference from dropdown Menu.

Step 9: Click "Save"

Add/Update Alumni Decedent Data

Step 10: Go through with this navigation [Contributor Relations ->Constituent Information ->People -> Personal Attributes -> Decedent Data]

Step 12: On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

Step 13: Enter "Date of death", "Place of Death", and "Death Certificate Nbr".

Step 14:Click "Save".

Add/Update Alumni External System ID

Step 15:Go through with this navigation [Contributor Relations ->Constituent Information ->People -> Personal Attributes -> External System ID]

Step 16:On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

Step 17: Enter "External System" and "External System ID".

Step 18: Click "Save".

➤ How to Maintain Alumni Work Experience?

Following are the requirements for maintaining Alumni Work Experience:

Execution Steps:

Step 1: Login with the KSAU sample users for this process [Sample User = "KS_DAR", Password = "123"]

Step 2: Go through with this navigation [Contributor Relations ->Constituent Information ->People -> Relationships -> Work Experience]

Step 3: On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

Step 4: Enter the following values:

Employer: Select the organization id form the list.

Start Date: Enter the start date of the job.

End Date: Enter the end date of the job.

Job Title:Enter job description of the company

Step 5 : Click "Save". This will update Alumni work experience information in the system.

Train the Trainer Modules: Alumni Management

7.2.6 Manage Alumni Registration

➤ How to Maintain Alumni Academic Information?

Following are the requirements for maintaining Alumni Academic Information:

Execution Steps:

Step 1: Login with the KSAU sample users for this process [Sample User = "KS_DAR", Password = "123"]

Step 2: Go through with this navigation [Contributor Relations ->Constituent Information ->People -> Academic Information-> External Degree]

Step 3: On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

Step 4: Enter the following values:

Org ID: Select the organization id form the list.

Degree Date:Enter degree date.

Data Source: Select the name of the organization from which you obtained information about the degree.

Degree:Select the type of external degree received or in progress

Honors Category:Select the appropriate value.

Degree Status: Select the appropriate value from the list of values.

Step 5:Click "Save". This will update alumni external degree information in the system.

Add/Update Alumni Class Year

Step 6: Go through with this navigation [Contributor Relations ->Constituent Information ->People -> Academic Information-> Class Year]

Step 7: On the "Find an Existing Value" tab, Enter "Institution" and "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

Step 8: Enter the following values:

Preferred Year: Select Preferred Year.

Alumnus Type: Select Alumnus Type.

Step 5: Click "Save".

➤ How to Maintain Alumni Relationships?

Following are the requirements for maintaining Alumni Relationships:

Execution Steps:

Step 1: Login with the KSAU sample users for this process [Sample User = "KS_DAR", Password = "123"]

Step 2: Go through with this navigation [Contributor Relations ->Constituent Information ->People -> Relationships -> Relationships]

Step 3: On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

OR

Click on the "Add a New Value" tab, Enter "ID" and click "Add" to open the page.

Step 4: Enter the following values:

Effective Date: Enter the effective date of the address.

Status:"Active".

Related ID: Enter the ID of the person or organization to which this constituent is related to.

Relationship: Select the appropriate value from the list of values.

Train the Trainer Modules: Alumni Management

7.2.6 Manage Alumni Registration

Step 5 : Click "Save". This will update alumni relationship information in the system.

Add/Update Alumni Work Experience

Step 6: Go through with this navigation [Contributor Relations ->Constituent Information ->People -> Relationships -> Work Experience]

Step 7 : On the "Find an Existing Value" tab, Enter "ID" and click "Search" to display the list of existing ID's. Click on a search result row to open the page.

Step 8 : Enter the following values:

Employer: Select the organization idfrom the list.

Start Date: Enter the start date of the job.

End Date: Enter the end date of the job.

Job Title: Enter job description of the company.

Step 9 : Click "Save". This will update Alumni work experience information in the system.