

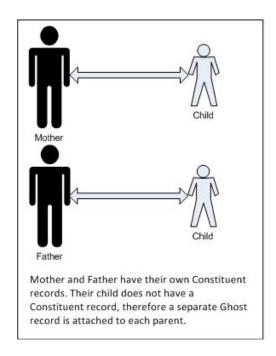
Working with Organization and Individual Relationships

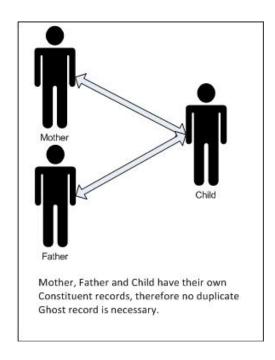
This document covers how we add Relationship records in Raiser's Edge. The sections concerning Constituent records vs. Ghost records and the difference between Relationship and Reciprocal fields are included to shed light on possibly confusing topics.

You should only add and update Addresses and Relationships if you have been trained to do so. If you have not been trained, Advancement Services staff will make these updates if you send them to BioUpdates@seattleu.edu.

Constituent Records vs. "Ghost" Records

Constituents are one of the major record types found in Raiser's Edge. All alumni and donors have their own Constituent records. "Ghosts" are another type of record that can be added to a Constituent to show a relationship exists between a person or organization and the Constituent. If the relationship to be added is not an alumni or donor, a new constituent record does not need to be created. A Ghost sub record should be created, existing only by being attached to a specific Constituent. The diagram below illustrates two familial relationship scenarios, one with ghost records for a child, the other with the child having his/her own Constituent record:



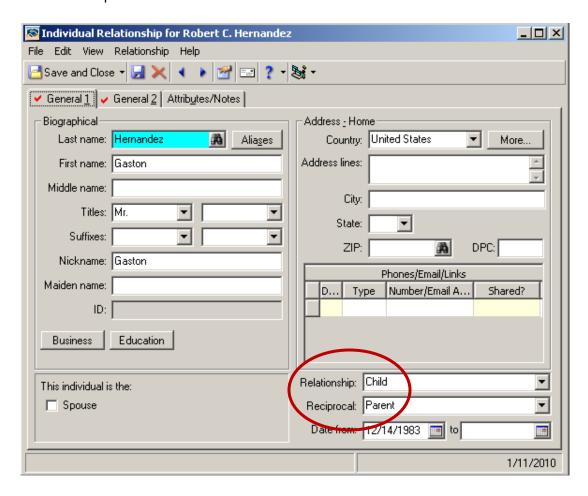


Using Ghost records can greatly simplify mailings and reports, and their use is appropriate in many cases. When adding relationships, you will most likely be adding Ghost records, but searching to see if they exist as Constituents during the process is important. Linking to existing Constituent records will reduce data entry time and record duplication.



The Difference Between Relationship and Reciprocal

Relationship and Reciprocal are fields found on a Relationship record. The Relationship field describes how the relation is associated to the Constituent, from the Constituent's point of view. In the example below, Gaston is the relation and Robert is the Constituent. Gaston is Robert's child. The Reciprocal field describes the relationship from the relation's point of view. Robert is Gaston's parent:



Other examples of Relationship and Reciprocal combos include Parent and Child, Employer and Employee, and Spouse/Partner and Spouse/Partner.



Organization Relationships

Below are common scenarios when working with Organization Relationships in Raiser's Edge: Adding new employment information and recording former employment.

Adding a New Employer on a Constituent's record:

Open the Constituent record for the person you are marking as being employed, open their Relationships tab and choose to create a new Organization Relation.

On the General 1 Tab:

- Always search to find an existing Organization record. It is preferable to link to an
 existing Organization record if one exists. This will reduce your amount of data entry
 and prevent duplicate information from being added into the database. If none is found,
 continue with the rest of the Relationship data entry.
- Use an Alias if there is a common name or alternate spelling of the organization. This will help other users search for and find this organization in the future.
- The Address fields should be the business address of the person in question, not the main address of the business itself. If the specific address is not known, use the main business address instead.
- Follow our address data entry procedures and validate the address after entry.
- When adding a new business address, check the "Send mail to this address" unless that
 address does not have a specific Suite or room number. We want to have the ability to
 send mail to a specific person/office, but should not if only the general company
 address is listed.
- Add business related phones and emails to the Address, but also add this information to the Constituent's preferred address if it isn't already there.
- Check the "Print organization name with address". This comes in handy when using Address Processing function in Mail and Export.
- Enter values for Industry, Position and Profession if known.
- Enter "Employer" for the Relationship and "Employee" for the Reciprocal values.
- Check the "Employee" and "Primary Business Information" boxes. This will make the business address available on the person's Address tab.
- Enter a "Date From" corresponding to the employment start date. Use today's date if you don't know what the actual start date is. Although the date fields accept fuzzy dates (year or month-year only), exact dates are preferable.

On the General 2 Tab:

• Uncheck the "<Org Name> matches gifts from <Person Name>" box. This prevents unverified matching gifts from unintentionally getting recorded in our database.



NOTE: If you are adding a new place of employment to a person's record, you may need to mark a previous place of employment has having ended.

Marking the end of employment on a Constituent's record:

Open the Constituent record for the person who no longer works for a specific organization and find that organization on the person's Relationship tab. Once you have the appropriate Relationship record open:

- Uncheck the 'Employee' checkbox
- Enter the day employment ended in the 'Date To' field. Use today's date if the actual end date is not known.
- Enter "Former Employer" in the Relationship field.
- Enter "Former Employee" in the Reciprocal field.

NOTE: We do not want to delete or overwrite old organizational relationships because the previous employment history is useful.

Individual Relationships

We commonly use Individual Relationships to record relationships between parents and their children, siblings and spouses. To add a new Individual Relationship, start by opening the Constituent record of the person you want to add a relationship to, open the Relationship tab and choose to create a new Individual Relationship.

On the General 1 Tab:

- Always search to see if an Individual record already exists for the person you are adding.
 It is preferable to link to an existing Individual record if one exists. This will reduce your
 amount of data entry and prevent duplicate information from being added into the
 database. If none is found, continue with the all Relationship data entry.
- Include a nickname when entering the names. Use the first name as the nickname if you do not know what the nickname is. This value is used in several salutation formulas which will not work properly if the nickname is missing.
- Maiden names should be entered if known. Having maiden names available is helpful when looking up older alumni information in other systems.
- Follow our address data entry procedures and validate the address after entry.
- Examples of common Relationship and Reciprocal assignments:

Person being added is the	Relationship Value	Reciprocal Value
Spouse*	Spouse/Partner	Spouse/Partner
Child	Child	Parent



Parent	Parent	Child
Brother or Sister	Sibling	Sibling

^{*}Check the "Spouse" box if you are adding a spouse relationship.

On the General 2 Tab:

- Enter a gender if you know what it is and use "Unknown" if you are not sure.
- Enter the birth date and SSN if you know what they are. This information is not required but is useful in avoiding duplicate record entry.
- Load the "IndvRel-AddSal" default set. This will load all the default addressee/salutations values so you don't need to select each one by one.

Related Procedures

- Adding Business Contacts
- Searching for Records
- Address Data Entry Standards
- **Updating Addresses**