



NWDUG 2007
What's New With R18 Core?

R18 delivers a number of data enhancements

- Relationship Information
- Organization Information
- Email addresses
- Other Core Functionality

Relationships

- Can track much more about relationships between individuals and organizations (not just employee/employer anymore)
- Allows for multiple relationships between same IDs
- Easier lookup of information

REL Screen Changes

- Can no longer access REL as a screen – it is a workflow that takes you PREL

R17 REL Screen

REL-Relation Information

Hood, Robyn ID: 0054320 See PERC
Nottingham, uk.

Spouse ID: [0054322] Spouse Name: [Maid Marion] Birth Last Name: Source:

Child ID	Child Name	Gen	Birthday	Source	Class
1 0055191	Arthur Hood				
2					
3					

Parent ID: Parent Name: Relation: Source: Class:

Other ID: Other Relation Name: Relation: Source: Class:

R17 - SPO (detail from REL Screen by detailing on spouse)

REL-Relation Information SPO-Spouse Information

Hood, Robyn ID: 0054320 See PERC
Nottingham, uk.

Source: [1] Spouse ID: [0054322] Reunion Class:

Prefix: Name LFM: [Marion] Suffix: [Maid] Birth LFM: [Maid Marion]

Phet Name: [Maid Marion] Mail Name: [1] [Maid Marion] Other LFM: [1]

Mail Codes: [1] Taxp ID/ET/DT: [1]

Joint Mail: [Yes] -Person Preferred Residence: [Sherwood Forest Way, Nottingham, uk]

Joint Solicit: [Yes] -Spouse Preferred Residence:

Salut: [1] Label: [1] Marriage Date: [1] Marital Stat: [M Married] Divorce Date: [1] Rel Stat: [1]

Summary of Changes:

- Organization relationships now added to REL screen (it's not just personal now)
- Address information now available by detailing instead of displaying on screen

R18- more RELE Functionality

- If there is more than one relationship between the same 2 IDs, you can designate one as primary
- If the ID you looked up in RELE has the same relationship with more than one other ID, you can designate one as the primary participant

Organization Contact Information

- ORCS (Organization Contact Summary) and ORGC (Organization Contacts) replaced by **RELS** (Relationship Summary)
- If you try to use ORCS you will be taken to RELS; ORGC will not be available & will result in a "selection not available" message.

ORCD Organization Contact Details R-17

ORGP-Organization Profiles | AORG-Additional Organization Info | ORGC-Organization Contacts | ORCD-Organization Cont

Matron, Maid
Nottingham, uk ID: 0054922

Employer Name: 0055132 - Sherwood Forest Preservation Society
 Title: []
 Role: Director
 Address Resolution: []
 Address Lines: 1 Sherwood Forest Way
 Address Modifier: []
 CPP: Nottingham, uk
 Country: []
 E-Mail Address: []
 Phone/Ext/Type: []

Pref Address: Yes
 Pref Business: Yes
 Adr Mail Rules: 1
 Comments: []

Start Date: 07/07/12
 End Date: []
 Principal: No
 Adr Chapter: 1

Removed in R18

ORCD Organization Contact Details reorganized - R-18

RELE-Relationships | ORCD-Organization Contact Details

Hood, Robin ID: 0062432

Organization: 0062443 Sherwood Forest Preservation Society

Role: PRES President
 Title: President

Address Lines: 1 []
 2 []
 Address Modifier: []
 CPP: []
 Country: []
 Phone/Ext/Type: 1 []
 2 []

Pref Address: No
 Pref Business: No
 Adr Mail Codes: 1 []
 2 []
 Adr Chapters: 1 []
 2 []

Comments: 1 []
 Start Date: 07/07/25
 End Date: []
 Principal: No

Will be employer or organization name depending on whether you detailed from contact or employee

Was adr mail rules

AORG (Additional Organization Info) has changed

- new fields added – IRS info, mail codes, website address
- Principal contact field no longer creates employee record

R-17 AORG

R-18 AORG

EMPL Changes Removed - Role field

Can maintain self employment info here

EMSU Changes Employee Summary

removed – Role field

Employee ID	Name	Title	Start Date	End Date	Status	PreEmp	PriCon
1 0062432	Robin Hood	President	07/07/25		Current	No	No
2							
3							
4							
5							
6							
7							

EMPD Changes

removed – Adr resolution – maintain directly here
or address info for Organization

Title: President
 Address: 1
 Preferred Address: No
 Start/End Dates: 2007/07/25
 Status: Current
 Position: new
 Recommended Hours/Week: 40
 Primary Employer: No

!!!New Functionality!!! External Institution Contacts

- If you set up institutions with counsellors, these counsellors default in as contacts on HSA and INAT screens
- This contact person information is then available for individual applicants/students

HAS and INAT forms

ASUM Applicant Summary | SSTR Secondary School Transcript | HSA High Schools Attended

Hood, Robin ID: 0062432

Institution: 0040536 Highland Secondary

Transcript Type: 1, 2
 Date Recd: [] Status: []
 Years Attended: 1
 Start/End Dates: [] []
 Rank and/or Pct: []
 Graduation Type: []
 High School GPA: []
 Summary Credits: []
 Acad Credentials: 1, 2
 Credentials End Dt: []
 Comments: []

CEEB/VICE
 Degree/CCOs
 MM/PII
 Equivalent
 Transfer

HAS and INAT forms

ASUM Applicant Summary | SSTR Secondary School Transcript | HSA High Schools Attended | RELS Relationship Summary

Highland Secondary ID: 0040536
 Conax BC VISA 359

Relation Type: DEN
 Description: Organization Contact
 Org Rel Category: []

Relation ID	Name	Start Date	End Date	Stat	Pri	Pri	Role
1	0062434 Mike Hoy	07/07/25			No	No	CDNT
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							

New Relation Forms

RELS

Relationship Summary

1. select person or org of interest (in header)
2. select relationship of interest (in this case, spouse)

Relation ID	Name	Start Date	End Date	Stat	Pri	Party	Role
1	Maid Marion				Yes	No	
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							

RERO

Relationship Roles

- only applies to a relationship with an organization other than employment

Role	Primary	Start Date	End Date
1	DIRCT Director		
2			

EMPR

Employment Relations

- for employment relationships with an organization

Position	Start Date	End Date	Status	Pri
1	07/07/25		Current	No
2				

OCNR Organization Contact Information

PREL-Person Relations | RELE-Relationships | OCNR-Org Contact Relationships

Contact
 Hood, Robin ID: 0062432
 Nottingham Home: 555-666-7777

Organization
 Sherwood Forest Preservation Society ID: 0062444
 SIC: Contact:

Title	Start Date	End Date	Primary
1 <input type="checkbox"/> Director of Everything DIRCT Director	07/07/29		No
2 <input type="checkbox"/>			
3 <input type="checkbox"/>			
4 <input type="checkbox"/>			
5 <input type="checkbox"/>			

FAMD Family Definition - details of family members - manage sibling relations

FAMD-Family Definition

Hood, Robin ID: 0062432
 Nottingham Home: 555-666-7777

Children of only [0062432] Robin Hood

Child	Name	Relate to Spouse as
1		
2		

Children of only [0062450] Maid Marion

Child	Name	Relate to Spouse as
1	0062455 Elizabeth Rowan	Child
2		

Children of Both Spouses

Child	Name
1	0062453 Arthur Hood
2	
3	

Manage sibling relationships

SIBD Sibling Relations

FAMD-Family Definition | SIBD-Sibling Relationships Maint.

Hood, Robin ID: 0062432
 Nottingham Home: 555-666-7777

Spouse [0062450] Maid Marion

Show only unrelated pairs N

Child

Child	Name	Relate as
1	0062453 Arthur Hood	
2	0062455 Elizabeth Rowan	Step-Sibling

What Is Needed From R17-R18?

Before using R18 (post install)

1. Define any new required roles in ROLE
2. Use RELT (Relationship Types) to add or correct any relationship types required

RELT – Relationship Types

RELT-Relationship Type

Relation Type: C

Description: Child

Male Relation Description: Son

Female Relation Description: Daughter

Category: C Child/Subscriber

Organizational Relationship: (circled)

Inverse Relation Type: P Parent

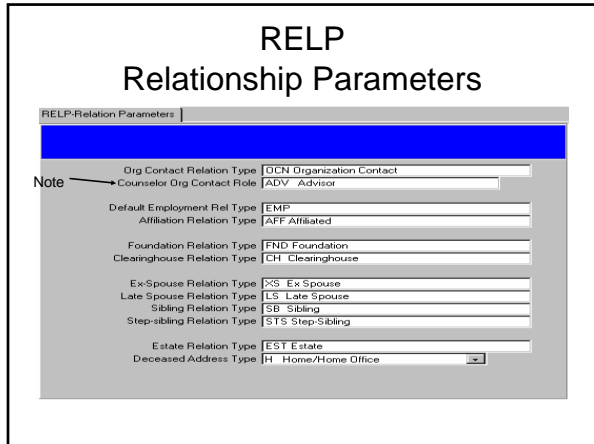
Comments: Flag if not a personal relationship

1		
2		
3		
4		
5		
6		

What Is Needed From R17-R18?

Before using R18 (post install)

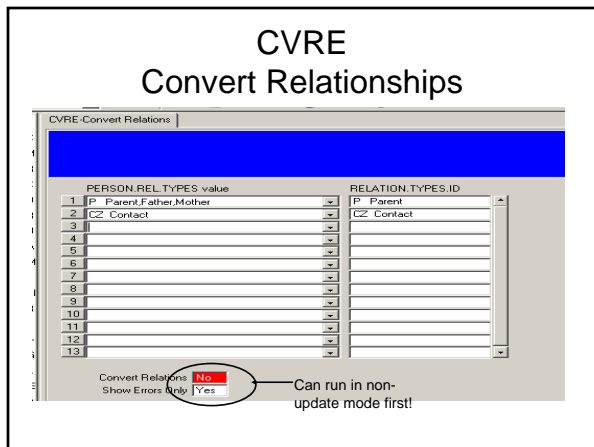
3. Use RELP to set default values



What Is Needed From R17-R18?

Before using R18 (post install)

- Convert personal relationships - run the CVRE (convert relations) process to convert R17 RELATION files to R18 RELATIONSHIP files



What Is Needed From R17-R18?

Before using R18 (post install)

5. Convert organization relationships - use CVOR to convert R17 employment and organization contact information to R18 EMPLOYMENT, RELATION, RELATIONSHIP, and ORGANIZATION.CONTACT files

CVOR Convert Other Relationships

Contact Role	Relationship Role
1 V Vice President	VP Vice President
2 P Principal	PRINC Principal
3 C Contact	CONT Contact
4	
5	
6	
7	
8	
9	
10	

Convert Relations No
Report Errors Only Yes

Data Cleanup

- It is likely that you will encounter data that requires cleaning during the CVOR conversion.
- Datatel delivers RELX (relation file editor), EMPX (employment file editor), PERX (person file editor), and CORX (corporation file editor) to assist with this one time cleanup.

Organization Information Enhancements

New Organization Information Forms

OROS Organization Roster

The screenshot shows the OROS Organization Roster application interface. It features a blue header bar with the title "OROS-Organization Roster". Below the header, there are several sections for configuration:

- Organization Selection:** Includes a "Saved List Name" field, "Organizations" (1-2), and "Organization Types" (1-2) dropdown menus.
- Relationship Selection:** Includes a "Relation Type / Role" dropdown, "Start Date" and "End Date" fields with "Go" buttons, "Relation Types Include" (1-2), "Relation Types Exclude" (1-2), "Roles Include" (1-2), and "Roles Exclude" (1-2) dropdown menus.
- Additional Organization Selection Criteria:** A checkbox labeled "No".

ORGF Organization Financials

ORGF-Organization Financials

Sherwood Forest Preservation Society ID: 0062444
SIC: Contact:

Annual Report Year: [1] [OK] [Cancel] Board Meeting Dates: 1 [] [OK] [Cancel]
 Total Revenue: [] [OK] [Cancel] 2 [] [OK] [Cancel]
 Total Assets: [] [OK] [Cancel] Funding Preferences: [F] [OK] [Cancel]
 Pre-Tax Net Profit: [] [OK] [Cancel] Relations: [X] [F] [OK] [Cancel]

Number of Full-Time Professionals: [] [OK] [Cancel]
 Number of Part-Time Professionals: [] [OK] [Cancel]
 Number of Support Staff: [] [OK] [Cancel]
 Number of Employees: [1] [OK] [Cancel]

Total Annual Giving: [] [OK] [Cancel]
 Profit Contribution Percent: [] [OK] [Cancel]

Grant Application Due Dates: 1 [] [OK] [Cancel]
 2 [] [OK] [Cancel]

Number of Grant Application Copies Required: [] [OK] [Cancel]
 Grants Given: [] [OK] [Cancel]

GRNT Grant Information

GRNT-Organization Grants

Sherwood Forest Preservation Society ID: 0062444
SIC: Contact:

Annual Report Year: [] [OK] [Cancel] Largest Grant: [] [OK] [Cancel]
 Total Number of Grants: [] [OK] [Cancel] Smallest Grant: [] [OK] [Cancel]
 Total Grant Amount: [] [OK] [Cancel] Average Grant: [] [OK] [Cancel]

Grant Purpose	Number of Grants	Number Pct	Amount	Amount Pct
1 [] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]
2 [] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]
3 [] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]
4 [] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]

Grant Description Purpose	Start Date	End Date	Recipient Request Amount	Grant Amount
1 [] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]
2 [] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]	[] [OK] [Cancel]

ORFP Organization Funding Preferences

ORFP-Org Funding Preferences

Sherwood Forest Preservation Society ID: 0062444
SIC: Contact:

Funding Interests: 1 [] [OK] [Cancel]
 2 [] [OK] [Cancel]
 3 [] [OK] [Cancel]

Funding Types: 1 [] [OK] [Cancel]
 2 [] [OK] [Cancel]
 3 [] [OK] [Cancel]

Geographic Preferences: 1 [] [OK] [Cancel]
 2 [] [OK] [Cancel]
 3 [] [OK] [Cancel]

Majors Hired: 1 [] [OK] [Cancel]
 2 [] [OK] [Cancel]
 3 [] [OK] [Cancel]

Contacts and Appointments: [] [OK] [Cancel]

CLIP Maintain Clipping Information

	Publication	Date	Summary
1	Times Colonist	09/01/31	marriage announcement to RHood
2			
3			
4			
5			

CLDT Clipping Detail

Publication: Times Colonist
 Date: 09/01/31
 Keywords: 1 MARRIAGE
 Page: 2
 Reference Number: 3
 Summary: 1 marriage announcement to RHood
 Text: 1 blah blah blah...
 Names: 1 0062430 Marion Hood
 Attachments: 2

CMPG Create & Maintain Campaign

Campaign: 2007
 Description: 2007 Fundraising
 Type: DM Direct Mail
 Purpose:
 Start Date: End Date:
 Coordinator:
 Long Description: 1, 2
 Campaign Solicitation Method:
 Contribution Amount Goal:
 Number of Contributions Goal:
 Number of Donors Goal:

Campaign	Description	Type	Start Date	End Date
1				
2				
3				
4				
5				

Email Enhancement

Email Hierarchies

- Allows us to define email hierarchies to use for communications instead of just one email type

- An ID will have one preferred email address; the email hierarchy on "MAIL" in NAHM determines which email will default as preferred (you can override)

Email Hierarchies – where you build them

NAHM Name and Address Hierarchy

Name/Address Hierarchy ID	Description	PF
1	MAIL	
1	FF Preferred Address	PF
2		
1	BA Bad Address	
2		
Include/Exclude Mail Codes		
Exclude		
1		
2		
Address Rules		
1		
2		
Person Rules		
1		
2		
Rules Operator		
Name Hierarchy		
1	FF Preferred Name	
2		
E-Mail Hierarchy		
1	CR College of Rockies	
2	FF Preferred Address	PF
1		
2		
E-Mail Person Rules		
1		
2		
E-Mail Rules Operator		

PF - use the email address flagged as preferred

Email Hierarchies preferred email default

PID7-Communication Management

Default email hierarchy for communications management

Determines which email to mark as preferred when <1 email entered (default; can override)

Processing E-Mail Hierarchy: PREFERRED Preferred Name & Address

Preferred E-Mail Hierarchy: PREFERRED

Preferred E-Mail Subroutine: []

Default Return E-Mail: []

Default Letter Format: []

Detail From Window to Editor Subroutine: []

Word Processor menu execution command: []

Word Processor Version Number: 2002

Default Batch Print Maximum: 999

Default File Suite Processing Year: []

Email Hierarchies Change on NAE & ADR

NAE Name and Address Entry

No longer able to create a blank email or one with incorrect syntax

Email field length increased to 50 characters

! NEW

Profile: [] ID: 000432

Name LTM: [] Suffix: [] Address Info: []

Address: []

City/Phone: [] Country: [] Source: []

Phone/Fax/Ty: [] Origin/Date: []

SN: [] Address Change: []

Birth Date: [] Source: [] Date: []

Ethnic/Sender: [] By: []

Mail Codes: []

E-Mail: []

Addresses: [] Preferred: []

Prof Name: []

Mail Name: []

What Is Needed From R17-R18?

First you get a chance to clean up existing email with the **CVVE** process.

- You get a report of emails that are blank or have syntax errors.
- You can convert emails from one type to another (if you want to change email types)

CVVE Convert Email Addresses

CVVE-Convert E-Mail Addresses

Update Mode No

Convert Specific Types

	From	To
1	LD Local	WWW World Wide Web
2		
3		

Convert Invalid Types To INT Internet

Saved List Name

Additional Selection Criteria No

What Is Needed From R17-R18?

Next you assign each person a preferred email using the **CVPR** process

- This report can be run many times so that each group of people are assigned the correct preferred email
- A report is produced after each run that shows who has been assigned a preferred email and who does not yet have a preferred email designated

CVPR Convert Preferred Email Addresses

CVPR-Convert Preferred E-Mail

Update Mode No

Override Existing Preferred No

E-Mail Substrings

	1	2
1		
2		

E-Mail Address Type WWW World Wide Web

Name/Address Hierarchy

Association Position

Saved List Name

Person IDs

	1	2	3	4
1				
2				
3				
4				

Additional Selection Criteria No

Other Core Enhancements

- New forms
- !!!Recording deaths!!!
- Personal Contact Information
- Common Application Defaults

New Person Information Forms

INAA Interests & Achievements

INAA-Interests and Achievements

Marion, Maid ID: 0062450
Nottingham Home: 555-666-7777

Denomination: AN Anglican

Groups: 1 alter guild
2

Reunion Classes: 1
2

Interests: 1 ARCH Archery
2 TH Tree Hugging
3

Achievements: 1
2
3
4
5

CHPP Person Chapter Assign Parameters

CHPP:Person Chapter Assign. Params.

Rule	Chapter
1 WESTC West Coast	WEST Western Provinces
2 CENT Central	CENT Ontario & Quebec
3	
4	
5	
6	

CHPA Chapter Person Assignment

CHPA:Chapter Assignment

Use Rules: Y

Chapter: _____

Clear Manual Chapters: No

Saved List Name: _____

Sources: 1 _____ 2 _____

Mail Codes to Include: 1 _____ 2 _____

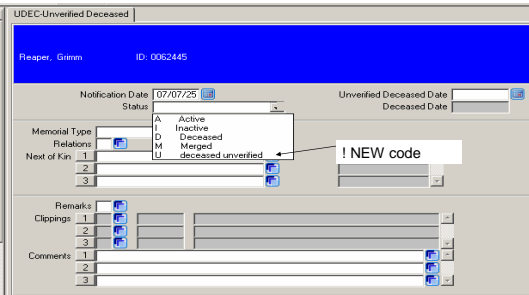
Mail Codes to Exclude: 1 _____ 2 _____

Additional Selection Criteria: No

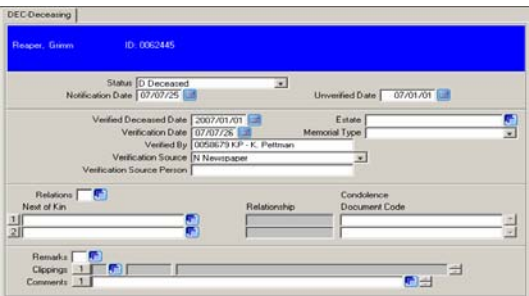
R-18 Recording Deaths

- Can no longer do this in BIO
- You will now have a way to differentiate between verified and unverified deaths
- Use UDEC (Unverified Deceased) to record an unverified death, DEC to record a verified death

UDEC - Unverified Death

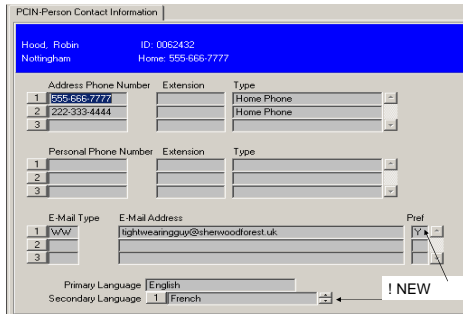


DEC - Verified Death



Changes to Existing Forms

Personal Contact Information



PCIN-Person Contact Information

Head: Robin ID: 0062432
Nottingham Home: 555-666-7777

Address Phone Number	Extension	Type
1 555-666-7777		Home Phone
2 222-333-4444		Home Phone
3		

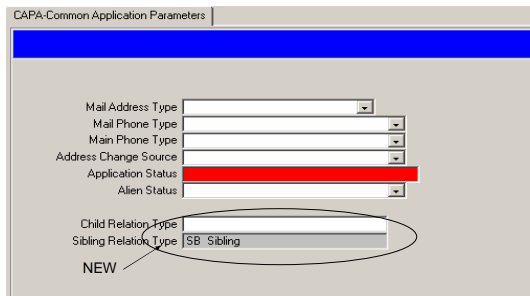
Personal Phone Number	Extension	Type
1		
2		
3		

E-Mail Type	E-Mail Address	Pref
1 W/W	lightweaving@sherwoodforest.uk	
2		
3		

Primary Language English
Secondary Language 1 French

! NEW

Common Application Default (CAPA) Changes



CAPA-Common Application Parameters

Mail Address Type
Mail Phone Type
Main Phone Type
Address Change Source
Application Status
Alien Status

Child Relation Type
Sibling Relation Type ISB Sibling

NEW

Questions?

Refer to Demographics and Communications
Management Enhancements – Release
Highlights
May 31, 2006
Available from the DataTel Website
