

Biographical Data Maintenance

Relationships

Description

This script will describe how to enter relationships data, and describes how to:

- Relate one individual to another.
- Identify an individual's legacy relationship to institution.
- Enter relationship detail data.
- Enter relationship addresses.

Process Steps

You can access the **Relationships** page through multiple navigation paths. NOTE: Depending on the path, there may be some additional search criteria. To ADD a new relationship, begin at Step 1. To MODIFY an existing relationship, skip to Step 3.

Student Recruiting > Maintain Prospects > Relationships > Relationships
Student Admissions > Application Entry > Relationships > Relationships
Campus Community > Personal Information (Student) > Biographical (Student) > Relationships > Relationships

Step 1: The Relationships Search Page

- 1.1.1 **ID:** If you know the student's EMPLID, enter it here. This is the most efficient way to search for a student.
- 1.1.2 **National ID:** If you know the student's National ID number (Social Security Number for USA, Social Insurance Number for Canada), enter it here.
- 1.1.3 **Last Name:** You can enter a portion of the last name as search criteria.
- 1.1.4 **First Name:** You can enter a portion of the first name as search criteria.
- 1.1.5 Click to continue or to have the system clear all of the text boxes so you can start again.

Relationships
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

ID:

Relationship Nbr:

National ID:

Last Name:

First Name:

Relationship:

Include History Correct History Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

- 1.2 If only one relationship exists for this person, you will be immediately directed to the Relationships page. If more than one relationship exists, you will see those relationships in the Search Results. If the relationship you wish to add does not exist, you must [Add a New Value](#).

Step 2: Adding a New Relationship

- 2.1) To add a new relationship, click on [Add a New Value](#).
- 2.2) Re-enter the person's ID and click .

Relationships

[Find an Existing Value](#) [Add a New Value](#)

ID:

[Find an Existing Value](#) | [Add a New Value](#)

2.3 Relationships Page

- 2.3.1) **If the related person is in the database**, enter the related person's ID, relationship, status and effective date. You may use the Lookup feature to find the ID of the related individual. [See DIAGRAM #4](#)

If the related person is not in the database, the name and biographical data fields are available

so that you can enter the related person's name and bio/demo data without an ID. Name should be entered as Lastname,Firstname Middle.
See [DIAGRAM #5](#).

2.3.2) The Guardian field is used to indicate the status (*Guardian, N/A, Other, Parent*) of the related person to the primary individual.

DIAGRAM #4

The screenshot displays a web interface for managing relationships. At the top, there are tabs for 'Relationships', 'Relationship Address', and 'Relationship Detail'. The main header shows 'Jean-Luc Picard' with ID '0066882'. Below this is a 'Relationship' form with the following fields:

- 'Effective Date': 11/18/2004
- 'Status': Active
- 'Related ID': 0030001 (circled in red)
- 'Relationship': Daughter
- 'Name': Picard,Amy
- 'Prefix':
- 'Suffix':
- 'Sex': Female
- 'Marital Status': Single
- 'Guardian': N/A
- 'NID Country': USA
- 'NID Type': PR
- 'National ID': 999999999
- 'Comment':

At the bottom of the form are buttons for 'Biographical Details', 'Legacy', 'Communication Recipients', and 'Joint Communication Management'. Below the form are navigation buttons: 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. A breadcrumb trail at the bottom reads 'Relationships | Relationship Address | Relationship Detail'. A red callout box on the right contains the text: 'Amy Picard is in the database – her data is visible in Jean-Luc Picard's record here.'

DIAGRAM #5

Jeanne Picard, Jean-Luc's spouse, is not in the database, but may be added *without* a Related ID.

- 2.3.3) Click on the **Legacy** button to access the Legacy Information page, where you can identify the related person's legacy relation with your institution, if applicable (alumnus/a, donor, trustee).
Click **OK** when finished to return to the Relationships page. See [DIAGRAM #6](#)

DIAGRAM #6

2.4) **Communications Recipients and Joint Communication Management**

On the **Communication Recipient** page, you can specify the communications for which a copy should also be sent to the related person.
On the **Joint Communication Management** page, you can create or dissolve joint communications for these two individuals.

NOTE! We did NOT implement these two features during set-up.

2.5) Relationship Address Panel

Relationships | Relationship Address | Relationship Detail

Jean-Luc Picard 0066882

Relationship Address Details Find | View All First 1 of 1 Last

Effective Date: 11/18/2004 Status: Active

Relationship: Daughter Picard,Amy

Related ID (or Name) Address

Address Type: HOME Joint Address

Country: United States

Address: 123 Elm Street
Caribou, ME 04736

[Related ID's Addresses](#)

2.5.1) Select the related individual's **Address Type** to associate with this relationship. If the related person does not have an ID, the address fields become available to manually enter the related person's address data. When the individual has an ID, the system automatically displays the address data for the address type you select. Only those address types that contain data are available.

If the related person has an ID, you may click this link to edit or update the related person's address data.

2.5.2) You may also choose to associate a certain address for the Primary ID in this relationship. If so, choose the Address Type you wish to associate with the relationship.

Primary ID Address

Address Type: HOME Joint Address

Country: United States

Address: 125 Universal Court
Bangor, ME 04401

[Primary ID's Addresses](#)

2.5.3) Click the [Primary ID's Addresses](#) link if you wish to edit or update the primary person's address data.

2.6) Relationship Detail Panel

The Relationship Detail panel allows you to track demographic information on the related person. We do not intend to collect income, occupation information or employer ID. However, you may enter the related person's occupation in free-form, and their highest level of education.

Relationships | Relationship Address | Relationship Detail

Jean-Luc Picard 0066882

Relationship Find | View All First 1 of 1 Last

Effective Date: 11/18/2004 Status: Active

Relationship: Daughter Picard,Amy

Relation Demographics

Income: [] USD Occupation: []

External Org ID: [] Employer: Interplanetary Federation

Highest Education Level: H-Some Graduate School

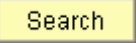
Relation Residency

Country: USA United States State: [] Date: []

[Phones](#) [Email Address](#) [Biographical Details](#) [Citizenship and Passport Data](#)

2.6.1) When finished with all three panels, click on Save to save the new relationship.

Step 3: Modifying an Existing Relationship

3.1) Enter the ID of the person for whom you wish to modify a relationship on the [Relationships search page](#), pictured below, and click .

3.2) Click on the Relationship that you wish to modify for this person.

Relationships

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

ID:

Relationship Nbr:

National ID:

Last Name:

First Name:

Relationship:

Include History Correct History Case Sensitive


[Basic Search](#)

Search Results

View All First 1 of 1 Last

ID	Name	National ID	MID	Short Description	Related People ID	Relationship	Name	Create Joint Records
0066882	Picard, Jean-Luc	999999999	SSN		0030001	Daughter	Picard, Amy N	

We wish to make the relationship with his daughter inactive.

3.3) Click on the  button in the **Relationship** section to insert a new effective-dated row for this relationship. Make the changes to the relationship as needed, including the effective date, and other criteria as necessary. You may also make a **Comment** on the field if desired. In the **Comment** field add your initials, your career code and the date since these comments are not career-specific.

Relationships | Relationship Address | Relationship Detail

Jean-Luc Picard 0066882

Relationship Find | View All First 1 of 2 Last

*Effective Date: 10/24/2005 *Status: Inactive

Related ID: 0030001 *Relationship: Daughter

*Name: Picard, Amy

Prefix: Suffix:

Sex: Female Marital Status: Single *Guardian: N/A

NID Country: USA NID Type: PR National ID: 999999999

Comment: Student requested inactivation of relationship. JHH, UMS, 10/24/05

Biographical Details Legacy Communication Recipients Joint Communication Management

Save Return to Search Notify Add Update/Display Include History

Relationships | Relationship Address | Relationship Detail

3.4) When finished with all changes, click  to save the modified relationship

Source Documents

Admissions Application, Financial Aid, Contributor Relations, HR, Employee Tuition Waiver form

Security (functional) Roles

Maintained by:

S_RA_SUPERUSER	S_RA_LEADER
S_RA_RECRUITER	S_RA_APPLICATION_REVIEWER
S_RA_DATA_ENTRY	S_RA_QUICK_ADMIT

Registrars, registrar staff, registration staff.

Financial Aid Staff
Contributor Relations

Viewable by everyone

APPROVED and TESTED by Admissions and Campus Community Team on January 10, 2006