Viking Task Force Meeting
Minutes
Fall Qtr.
October 14, 2003

Viking Users who attended:
Bryan Carlson, Diane Viero, Lisa Wilson, Robin Clark, Olivia Rivera, Yulduz A.,
Allison Tavaglione, Susan Kean, Yolanda Zubia, Marie Schultz, Joe Parent, Al Kim,
Cristian Hamilton…All Advancement units we re represent accept for Marketing &
Media Relations.

Meeting Notes:

Managing Email Addresses
Al Kim began the Task Force meeting at 2pm with an introduction to the proposed
storage and coding of Email within Viking. Yulduz provided a handout (Appendix A)
that explained the process. New Email codes were introduced for the group to discuss.
Yulduz provide the group with the three email tracking codes that she had developed.
Inactive email or code I was to serve those emails that had been found to be either
wrong or undeliverable. Preferred email or code E was to serve those emails that have
been said to be the preferred email of the individual. Code E can only be set if the
individual contacts the University in some form and indicates his or her preference. This
code was not meant to be used as the University’s preference. The final code C or Active
Email will be what the bulk of the emails in Viking will be coded. It is meant to be the
default code for all good emails entered into Viking except those which are to be coded
because of a constituent’s preference. Originally the C code stood for current email but
the group decided that active would allow for the following definition: Current emails
will be an aggregate of those emails which are coded E and C. It was also agreed that the
codes Yulduz had provided were the only codes needed at this time, and the option of
creating new codes for further email tracking was always open to future discussion. Also
control codes for email, such as “Do Not Email” codes, were brought up and it was found
that these would be up for consideration after the process is used or a constituent deems a
control code necessary.

Action Items:
1) UAIS will test the email storage and coding process in the Viking Test
   environment.
2) Yulduz will create triggers for auto populations of certain information when an
   email is added.
3) Once the process is tested fully and moved to Viking Production environment
   users will be notified.
4) All existing emails in Viking will be coded with the C code, as they will be
   considered active emails until confirmation of preference from the constituent or
   inactive status.

Old/Obsolete Records for Deletion
Al Kim introduced the topic with a presentation of a definition of a record that could be
considered a candidate for deletion from Viking. The target record must meet some very
strict restriction in order to qualify. (Note: For a copy of the exact qualifications please contact Al Kim.) The Task force agreed to Al’s definition of such a record and the group agreed that the following as well: First the process will be targeted to a specific segment of the Viking database records. These records are past Parents of UCR alumni who also meet all the criteria in the definition. A list would be developed for distribution amongst the Advancement unit. This would allow colleagues to review and cancel the deletion of a record they were interested in keeping in Viking. Al Kim requested an individual from each of the Advancement offices to serve as a contact to distribute the candidate list that would be generated. The following individuals volunteered:

Diane Viero – Events Management and Protocol
Olivia Rivera – Alumni and Constituent Relations
Robin Clark – Governmental Relations
Yolanda Zubia – Development

Also discussed and agreed upon, the list distribution will become an annual event. The list will be distributed toward the end of the month of July each year.

Action items:
1) UAIS will develop the first lists for deletion within the coming weeks after the meeting.
2) UAIS will distribute to the above contacts and will ask for contacts from Media & Marking Relations.
3) UAIS will prepare in July of 2004 for the annual process of deletion candidates list distribution by months end.

Manual Education Data Entry
Lisa Wilson explained to the group that a certain procedure had to be followed to add an education (EDU) record into Viking. Lisa also mentioned that she had gone over already with those individuals who the procedure pertained too. A clarification of who actually has EDU records was also offered. Alumni who have graduated from UCR have an EDU record in Viking. However, EDU records do exist for individuals who have graduated from other institutions, but these individual’s records where added for tracking and research purposes and they contain a different institution code to that of all those who are associated with UCR. Also individuals, who consider themselves alumni or meet the criteria for alumni status as defined (three continuous quarters at UCR), may have an EDU record but will be coded as not having graduated.

What’s New
Al Kim made some announcements about the new “No Contact” control code “NCNT” for the Special Indicator Screen. Individuals who notify UCR that they would not like any contact from UCR in any form will have this code place in their special indicators. Also records that meet the agreed upon definition of a no contact record will be coded. Yulduz has also created a trigger that will automatically set solicitation codes and receives mail code when a “NCNT” special indicator is entered.
Al Kim also made the Task Force aware that individuals have been coded with “No Annual Fund” control code. The code is meant to exclude individuals from the Annual fund phonathon.

Joe Parent gave an overview of the new email system that the campus has rolled out. The current “opt-in” approach was explained. An individual can decide to move to the new email system now…in the future all central campus email accounts will be moved to the new system. Advancement colleagues can follow the introductions at http://cnc.ucr.edu/email or contact Joe Parent at x27105 for an appointment to move your current email account to the new system.

Yulduz provided an update of the new records that were added into Viking during the time that past from the last Viking Task Force meeting this past summer. There were 1701 new spring graduates added to Viking as well as 1678 teaching Credentials. Some of the teaching credential records where in Viking before, but this process allowed for verification of these records.

Marie Schultz explained to the group about the new prospect information program that the Research office of Development is using. PIN supplements Viking information with additional wealth information. The total number currently in this program is approximately 11,000 out of the 50,000 candidates pulled for screening. It was stress that the information in PIN is not a replacement for the information in the Viking Development System…instead its added information on individuals that exist in Viking. Development Officers and other interested parties should contact Marie Schultz for information or training schedules for PIN. Joe Parent will provide installation of PIN upon request from either the Research office or the authorized PIN user.

Al Kim concluded the meeting with the date and time for the next Viking Task Force meeting. All Viking users are welcome to attend the January 13, 2004 meeting from 2-3:30pm. The location will be announced closer to the date.

Action Items:

1) Further discussion on privacy issues for next meeting. (i.e. storage of student records, parent records that exist in SIS)
2) UAIS should code “no contact” for spouses of no contact individuals. Possibly a trigger developed to complete this task.
3) Distribute List of candidates for no contact coding.
4) Send ideas, suggestions, agenda items, and topics of discussion to Al Kim.
APPENDIX A

Email Coding and Storage within Viking Development System

The following proposed coding and storage process allows UAIS and all the Viking users to maintain multiple email addresses as well as code those addresses for proper usage. Currently the mechanism for storage within Viking is either the home email or business email containers within D. Primary Addresses screen. The preferred email corresponds with the individuals preferred home or business address. Thus this makes it complicated to store more than two emails in the current Viking setup. Additionally, it is impossible to designate a preferred email that is not linked to the same preferred mailing address. UAIS has developed a possible storage and coding system that will allow for multiple emails as well as multiple preferences for the coding of email addresses.

The E. Former and Subsidiary Addresses screen has been suggested as a possible alternative to store email addresses and code them properly. Under the guidelines to be considered, an individual can have as many emails as is necessary to collect. Also the emails can be coded in a fashion that allows for tracking and proper usage. Multiple preferred emails can be selected by the individual
as well as multiple active emails. Bad email addresses can be captured and potentially distributed to Unit offices for email list purging or clarification of miscoding. The same address input screen would be used for coding and storing emails as is used to store and code former addresses. New email code can be developed to better track the emails, thus allowing us to provide the wanted email addresses. For example, a report request could be submitted that asks for lists of all the preferred email addresses of current Chancellor’s Associates.

The four main areas that would be entered for an email address are the **Address Type**, **Description**, **Short Descr**, and **Email** containers. **Address Type** would consist of a pull down screen that contains the user defined codes developed for tracking emails. **Description** would repeat the email for viewing purposes. **Short Descr** would serve the purpose of maintaining the source of where the email came from. **Email** would simply serve as the container for the coded email.