

A Glossary of Terms for Millennium as they pertain to The University of Alabama.

Alumni Types

Alumnus – Anyone who has completed at least 12 semester hours in any of the Undergraduate Colleges or Schools at The University of Alabama. *See below.

Degreed Alumnus – Anyone who has graduated from any of the Undergraduate Colleges or Schools at The University of Alabama.

Graduate Alumnus - Anyone who has completed at least 12 semester hours in any of the Graduate or Professional Schools at The University of Alabama.

Degreed Graduate Alumnus – Anyone who has graduated from any of the Graduate or Professional Schools at The University of Alabama.

***Alumna** - Feminine singular counterpart of alumnus.

***Alumnae** - Feminine plural counterpart of alumni.

***Alumni** - Masculine plural of alumnus; can refer to a mixture of male and females, as well.

Constituent Types

Alumnus - Anyone who has completed at least 12 semester hours in any of the Undergraduate Colleges or Schools at The University of Alabama. For a further breakdown of Alumni terms, see [Alumni Types](#).

Graduate - Anyone who has completed at least 12 semester hours in any of the Graduate or Professional Schools at The University of Alabama. For a further breakdown of Alumni terms, see [Alumni Types](#).

Current Students - Anyone who is currently enrolled in any of the Colleges or Schools at The University of Alabama.

Parents – Constituents whose only relationship with the University is that of a current or past parent.

Friend – An individual who is not an Alumni or Parent.

Corporation – A legal entity authorized to transact business.

Corporate Foundation – A funding organization affiliated with a Corporation.

Foundation – A private funding organization.

Faculty – The Professors or Instructors of the University.

Staff – Employees of the University who are not Faculty.

Other – An entity that does not fall into the categories above. For example, Clubs or Departments.

Scholarships – Scholarships that are awarded at The University of Alabama.

Name Information

Name Types - Various names can be attributed to a constituent. Following are the various types used on Millennium.

Preferred Name – The name that the Constituents have indicated as the preferred name.

Birth Name – The Constituents birth name. Only on records where the preferred name is different.

Combined Name – Put on records in which the Spouse is not a constituent on the system or in which the mailing name is non-traditional.

Combined Salutation – Salutation put on records where the Spouse is not a constituent on the system or in which the salutation is non-traditional.

Former Name – Used to identify a Constituent's name after they have changed their name.

Lookup Name – Used like an alias for Corporations and Foundation.

Nickname – A Constituents nickname.

S. Cowen Salutation – Scott Cowen's Salutation for Constituents.

Spouse – Put on records where the Spouse is not a constituent on our system.

Name Lookup Key or Key Display - Determines if this name record will be used for searching purposes in the Record Lookup Box in Millennium.

Address Information

Locators - Indicates the status of the address. For example, good, bad, lost, etc.

Types - Indicates the kind of address. Following are various types on Millennium.

Preferred Address – The address that the constituent has requested to receive all mail. Traditionally the most current and accurate address. This is noted on Millennium as a Utilization.

Home Address – This is the address that the constituent has indicated as his/her place of residence.

Business Address – This is the address where the constituent is employed.

Contact Address – This is the address other than Home or Business to which the constituent wishes mail to be addressed.

Research Address - This address is being researched by ADIS to ensure its validity.

Country - The Country of the particular address.

Counties - The County of the particular address. This is based on the Zip Code in the address file.

Regions - Not used at this time in Millennium.

Districts - Not used at this time in Millennium.

Phone Number - The phone number for the particular address.

Phone Restrictions - Denote the constituents requests for the use of his/her phone number.

Do not call - Period - The constituent does not want to be called for any reason but the University.

Non-Published - The constituent does not want the phone number published.

No Telephone Solicitation - Constituent does not want to be solicited via telephone.

Record Restrictions

Record restrictions differ from Phone restrictions in that record restriction restricts all contact from the University.

Do not Contact – Constituents who want no contact at all with the University.

Do not Publish – Constituents who do not want their address and telephone number and other information printed in any type of list for public consumption.

Do not Release – Constituents who have requested that their personal information not be given out.

Do not Solicit – Permanent – Constituents who have requested not to be solicited at all for any reason in their lifetime.

Do not Solicit – Annual Review – Constituents who have requested not to be solicited, but for one reason or other they are reviewed annually to see if their feelings have changed towards being solicited.

Job Information

Status - Indicates the work status of the constituent in the position. For example, Active, Retired, No longer employee, Matching Gift Company.

Firm - The employer of the constituent. If the Firm or Company name is italics, the Firm or Company is also recorded on Millennium.

Division - Indicates the division within the Firm or Company.

Title - The constituent's title within the Firm or Company.

Occupation - A Millennium table-driven field that corresponds to the type of job the constituent holds.

Industry - A Millennium table-driven field that indicates the employment industry.

Descriptor 1 - Additional descriptors to indicates the specifics of a constituents job.

Descriptor 2 - Additional descriptors to indicates the specifics of a constituents job.

Matching Company - Indicates if the Firm or Company matches charitable contributions.

Begin - The date the constituent began employment with the Firm or Company.

End - The date the constituent ended his/her employment with the Firm or Company.

Salary Class - A Millennium table-driven field of the ranges of salary.

Education or School Information

Institution - Name of the College or University a constituent attended.

School - Name of the College or Department within the Institution a constituent attended.

Campus - Location of Campus or Branches of the Institution. (Currently, this field is not being used)

Department - Name of the Department within the Schools.

Concentration 1 - The constituent's Major while attending an Institution.

Concentration 2 - The constituent's Minor while attending an Institution.

Degree - Degree attained by the constituent while attending an Institution.

Degree Date - Date the Degree was attained.

Preferred Date - The class year with which the constituent wishes be associated for reunions, etc..

Years Attended - Not used at this time at Tulane.

Attribution Information

Attribute Type - A table-driven field from Millennium that denotes special information relating to the constituent. For example, specific sports played, (football, baseball); involvement with civic activities, (Knights of Columbus, Kiwans,); boards the constituent sits on, (Alumni Association Board, Tulane's Board of Administrators). The specific Record Restrictions can be found here.

Attribute Group - A table driven field from Millennium that indicates the assigned group to an attribute. This would include Record Restrictions, Boards, Alumni Activities, etc.

Position - A text field that can indicate the position a person holds or held.

Descriptor 1 - A Millennium table driven field giving specifics of the attribute.

Descriptor 2 - A Millennium table driven field giving further specifics of the attribute.

Start -Date on which the constituent achieved this attribute.

End - Date on which the constituent no longer held this attribute.

Relationship

Is a - A Millennium table-driven field that describes the relationship of the constituent to the relative. (i.e., Spouse, Parent, Child, etc.)

Whose a - A Millennium table-driven field that describes the relatives relationship to the constituent. (i.e.,Spouse, Child, Parent, etc.)

Is - Name of the person that the constituent is related to.

Constituent Type - Type of constituent of which the related person is. See Constituent Type above.

Preferred Year - The preferred year of the related person.

Parent Year - The Parent year of the related person.

Group - The type of relationship. (i.e., Family, Prospect Management.)

Comments

Type - Indicates the type of comment. For example, confidential, alumni activity, reference, etc.

Memo or Comment - Text field to notate any special information.

Death

Date - The date the constituent died.

Cause - What the constituent died from.

City - The city in which constituent died in.

Place - The state in which the constituent died in.

Country - The country in which constituent died in.

Notified by - How ADIS received the information of the constituents death.

Corroborated by - Who corroborated the information.

Tracking

Contacts

Actual Date - Actual date of the agreed meeting.

Scheduled Date - Planned date of a contact meeting.

Place - Where the meeting is scheduled to take place. In Millennium this field is a free form text field.

Contacted By - The person who goes to meet a donor or contribution. The individual is a representative of the University.

Contact - The person who is sought after by a University representative for the meeting.

Campaign - Campaign that the contactor is being asked to contribute money to.

Division -

Priority -

Action - Type of action to be taken next.

Document - An attachment document of further details of the meeting.

Proposals Proposals are not used at this time in Millennium.

Planned Gift

Screening

Media Media is not used at this time in Millennium.

Gift

Transaction Type - The specific kind of transaction.

- ✘ **Credit Transaction** - A gift that is created to give a donor recognition of a money, services or property.
- ✘ **Conversion Total** - Cumulative transactions total that does not have history or detail reflected in the old system.
- ✘ **Gift Transaction** - An out-right donation of money, services or property to the University.
- ✘ **Gift Journal** - Discharge of a gift on a constituents record, with a brief account of the events.
- ✘ **Gift Void** - Discharge of a gift on a constituents record, when an error has been made.
- ✘ **Honor Transaction** - A gift given in Memory or Honor of another constituent. It is a soft credit on the honoree's record. It is a hard credit on the donor's record. See definitions for Soft and Hard Credits.
- ✘ **Match Pledge Journal** - Discharge of a matching pledge on a constituents record, with a brief account of the events.
- ✘ **Match Pledge Transaction** - This is a promise by the company or corporate foundation to contribute a set amount of money based on the donations of the constituent. The hard credit is attributed to the company or corporate foundation. The soft credit is attributed to the employee. (- ratio)
- ✘ **Match Pledge Void** - Discharge of a matched pledge, when an error has been made.
- ✘ **Pledge Credit Transaction** - A pledge that is created to give a donor recognition of money, services or property.
- ✘ **Pledge Potential** - An informal agreement to contribute some unspecified sum of money, services or property to the University. (Specifically used by the Annual Fund Phonathon)
- ✘ **Pledge Transaction** - A promise to contribute a set amount of money, services or property to the University.
- ✘ **Pledge Payment Transaction** - A transaction in partial or complete fulfillment of the Pledge.
- ✘ **Write-Off Transaction** - Dismissal of a Pledge Balance.

Pledge Balance - Expected payment(s) remaining on a Pledge.

Joint Transaction - A combined gift that is given by two constituents so that each has a transaction shown half of the amount of the gift on his/her record. For example, Fred and Wilma Flintstone make a \$100.00 joint gift. \$50.00 hard credit displays on Fred's record and \$50.00 hard credit displays on Wilma's record.

Hard Credit - The amount that can be legally recognized as being given by a constituent. This may also be referred to as "IRS" credit as it can be filed for a tax deduction by the constituent.

Soft Credit - The amount of "soft" or recognition credit this constituent has received for a gift. A donor may receive soft credit for any donation made by another constituent that they are associated with (i.e., honoring gifts, spouse's gifts, etc.)

Revocable Pledge - Indicates whether the pledge is revocable or irrevocable according to FASB (Financial Accounting Standards Board) standards. Revocable pledges are not legally binding. Only after payments have been made towards the pledge, is the amount paid considered an asset.

Joint With - Indicates the name of the joint contributor.

Anonymous Gifts - Donations given to the University that the donor does not want to be acknowledged for giving.

Process Date - The date the transaction is actually processed or entered into Millennium.

Effective Date - Date used to indicate the date the Donor wishes to receive credit for the transaction.

Tender - Method by which a transaction was contributed. (Check, Stock, Gift-in-Kind, etc.)

Campaign - A specific designation that funds are raised for.

Campaign Year - The year associated with the campaign.

Solicitation - How a donor was approached to make a specific donation or transaction.

Special Acknowledgement - Indicates the acknowledgement type for the transaction. (Used in conjunction with the donor receipts)

Purpose - The Account Number the transaction was placed in. Following the Account Number is the Name of the Account.

CFAE Use - An alpha character that indicates how the donations are to be used. [See the CFAE Chart.](#)

Division - Further explanation of the use of the donation.

Division ID - ID number of the Division or School assigned to the transaction. See the [Division ID Chart.](#)

Pledge Billing Information

Billing Cycle - Designates how often payments will be made on the constituent's pledge.

Number of Payments - Indicates the number of payments that will be made towards the pledge.

Start Date - The date (year/month) the first payment on this pledge is due.

Dues

Memory