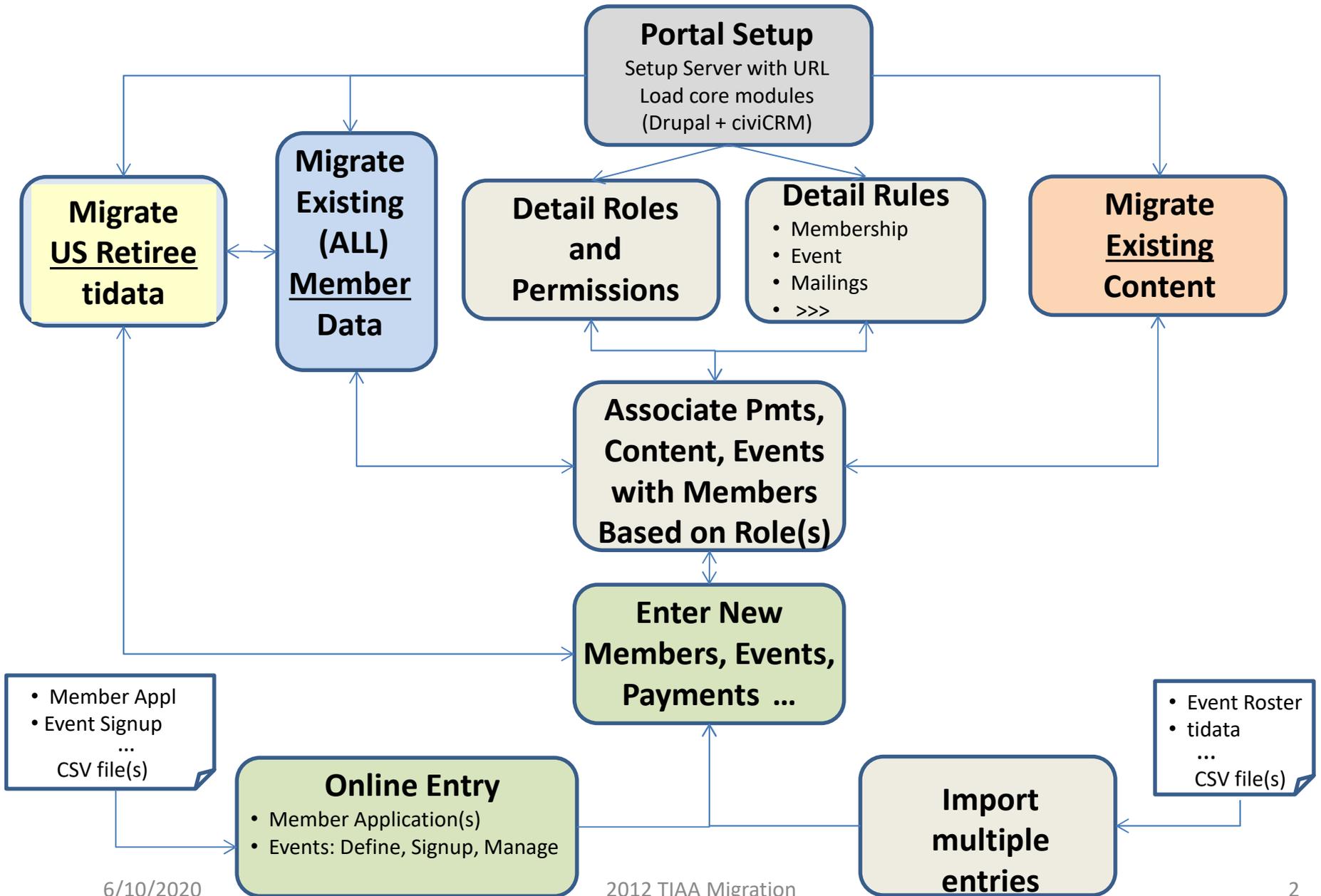


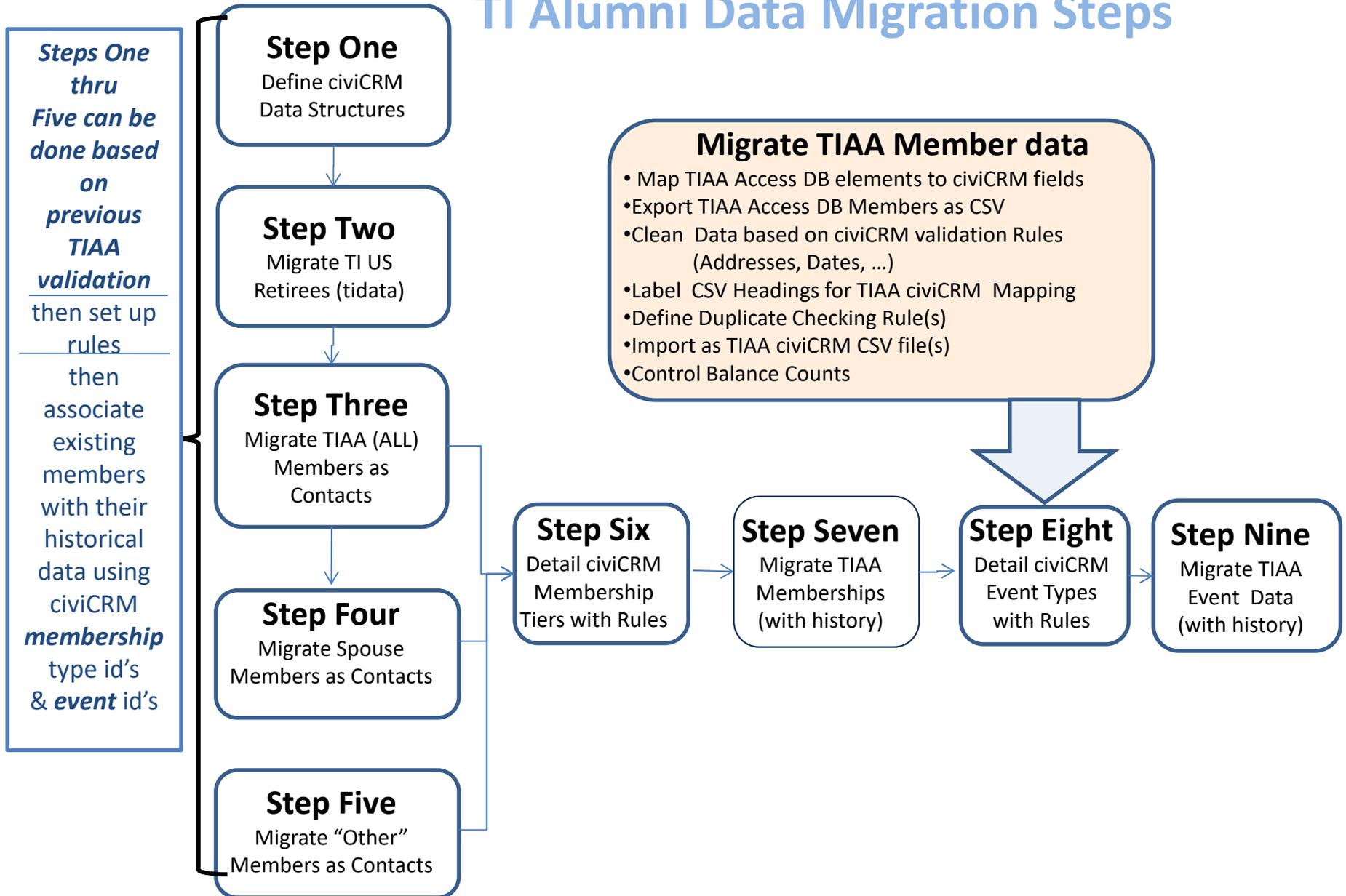
TI Alumni civiCRM Migration

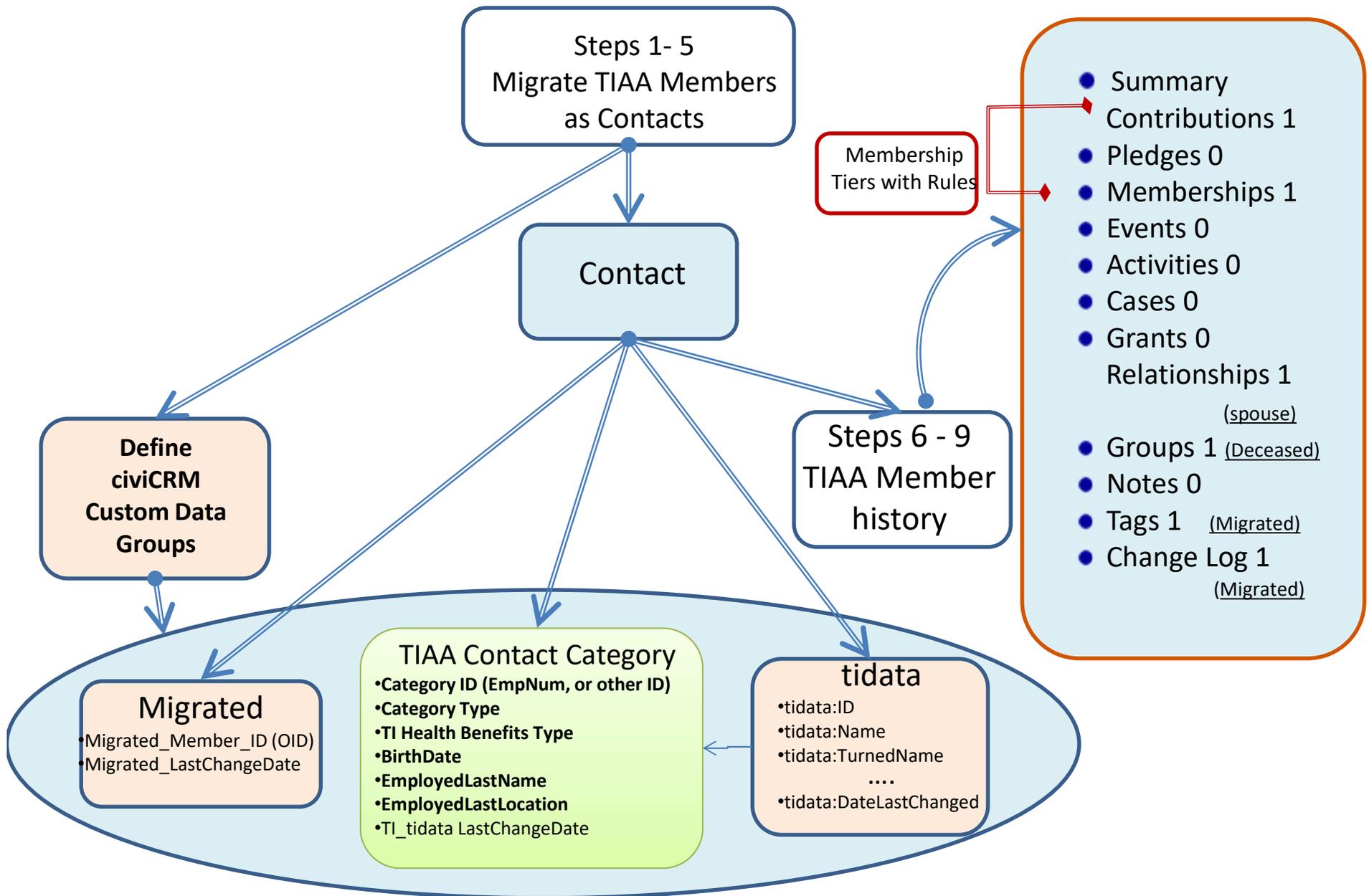
As of 02-21-2013

TI Alumni Data Migration Steps



TI Alumni Data Migration Steps





1. Naming/semantics now match actual field usage
 - i. “Members” file = Contacts
 - ii. Member employee numbers – are now ID’s
 - iii. Naming/semantics now match actual field usage

The TI HR **tidata Merge Process** will be “transparent” and easier to manage

2. Fields have single meaning
 - i. Deceased Contacts
 - ii. Member type
 - iii. Health Plan category separated from Membership – applies to all retirees !

3. Automated validations for:
 - i. Duplicate checking
 - ii. Mailing and email addresses
 - iii. Email effectiveness: bounce, click-through, etc.
 - iv. Geocodes – mapping
 - v. Membership renewal s with notifications

TIAA_Contact_Categories - Custom Fields

Field Label	Data Type	Field Type	Order	Req?	Searchable?	Enabled?	
TIAA_Alumni_ID	Alphanumeric	Text	↓ ↑	No	Yes	Yes	Edit
TIAA Contact Category Type	Alphanumeric	Select	↕	No	Yes	Yes	Edit
TI Retiree Benefits Plan Type	Alphanumeric	Select	↕	No	Yes	Yes	Edit
TIAA_Contact_BirthDate	Date	Select Date	↕	No	No	Yes	Edit
TI_EmployedLastName	Alphanumeric	Text	↕	No	No	Yes	Edit
TI_EmployedLastLocation	Alphanumeric	Text	↕	No	No	Yes	Edit
TI_LastChangeDate	Date	Select Date	↕	No	No	Yes	Edit

Automated “templated” Reports

Tag	Is TIAA_Migrated
TIAA_Alumni_ID	Is not empty (Null)
TIAA Contact Category Type	Is one of TI Retiree, Other former TIER, Surviving TI spouse
TI Retiree Benefits Plan Type	Is one of TI Health Benefits Plan, Other Health Benefits Plan

Next > Last >> Records 1 - 10 of 214

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Contact Name	Contact ID	Street Address	City	Postal Code	State/Province	Country	Email	Phone	TIAA_Alumni_ID	TIAA Contact Category Type	TI Retiree Benefits Plan Type	tidata_EmployeeNum
Stearns, Polly	20201	2809 Woodlake Ct	Highland Village	75077	Texas	United States	steamspa@yahoo.com	4692935039	76325	Surviving TI spouse	Other Health Benefits Plan	76325

Contact Name	Contact ID	Street Address	City	Postal Code	State/Province	Country	Email	Phone	TIAA_Alumni_ID	TIAA Contact Category Type	TI Retiree Benefits Plan Type	tidata_EmployeeNum
Alvarez, Grace	20193	310 Wildbriar	Garland	75043	Texas	United States	galvarez@airmail.net	(972) 840-0794	74948	Surviving TI spouse	TI Health Benefits	74948

Pick your fields, select your filters, apply a sort sequence, give Your report a name, save, and GO

TIAA Memberships by Category Type

Report Criteria

Display Columns

Contact Name Contact ID Street Address City
 Postal Code State/Province Country Email
 Phone

Contribution Total Amount Contribution Type Transaction ID
 Receive Date Receipt Date Contribution Status Contribution Source
 Membership Membership Type Member Since Start Date
 End Date Membership Status Membership Source
 Participant Event Participant Status Role
 Register Date Fee Level Fee Amount
 Relationship Relationship Type Relationship With Start Date
 End Date
 Activity Activity Type Subject Added By
 Activity Date Activity Status With Contact Assigned To

▼ tiaa_migrated_members

TIAA_Migrated_MemberID

▼ TIAA_Contact_Categories

TIAA_Alumni_ID TIAA_Contact_Category_Type TI_Retiree_Benefits_Plan_Type

▶ tidata

Order by Columns

Column	Order	Section Header / Group By
TIAA_Contact_Category_Type	Ascending	<input type="checkbox"/>
TI_Retiree_Benefits_Plan_Type	Ascending	<input type="checkbox"/>
Last Name, First Name	Ascending	<input type="checkbox"/>

▶ another column

Set Filters

Contact Name Contains

Group Is one of Administrators
TI Retiree
TIAA Non-Retirees
TIAA_Member_Spouses

Tag Is one of Company
Government Entity
Major Donor
Non-profit

▶ tiaa_migrated_members

▼ TIAA_Contact_Categories

TIAA_Alumni_ID Is not empty (Null)

TIAA_Contact_Category_Type Is one of TI_Retiree
TI_Deceased
Raytheon_Retiree
Raytheon_Deceased

TI_Retiree_Benefits_Plan_Type Is one of TI_Health_Benefits_Plan
Other_Health_Benefits_Plan

Other Tasks – Requirements

- Manage TI Alumni Site
 - Contacts and Memberships
 - Parallel Member update Test Jessica, Membership team - [March](#)
 - Detail ongoing processes Jessica, Barbara
 - Cleaned & Matched contacts & members Barbara, Bill, Leroy
 - **Imported, validated In Memoriam Rpt** **Barbara, Ronnie (ID'd under-reported)**
 - Events – color-coded calendar !
 - Types, Rules ... Color coded and filterable by type
 - Travel (pilot) - complete Ronnie, Peter
 - Roles and Permissions
 - Administrator Vendor team site enhancements & upgrades authorized to assign, set up and manage roles
 - TIAA Administrator
 - **Function Chairs/Roles** **Contacts, Memberships, Obits, Events, Payments, Content (Articles, News, emails...)**
 - Content Management
 - Mailings Communications ...
 - Events entered Ronnie &
 - Payments – history loaded Barbara
 - Define templates in civiCRM Jessica, Jon, Membership

Other Tasks – Requirements (continued)

- Manage TI Alumni Site
 - Contents by topic (horizontal tabs)
 - Fill in functional content details
Ronnie, teams
 - Set up eNews, standardized emails and letters with trigger rules
Jon, Jessica, Membership, Barbara
 - Refine data entry (forms/pages):
Vendor, Barbara, Jessica, Teams
 - Payments (Paypal, credit cards...)
 - event signups
 - amazon orders (?)
 - Membership tracking
 - Financial- membership trends (free...)
complete (by payment type)
 - Events - signups, waiting lists, maps
built into system
 - Site access statistics
built into system (Google analytics)
 - Training
 - Document existing scenarios using new system