

Data Integrity

An alumni's permanent record in iModules is called a member record. Each record is identified by Common ID which is the same as their Cornell EmplID. It is also sometimes called their Constituent ID.

A temporary record in iModules is called a non-member record. Both Alumni and non-alumni can have non-member records created during various interactions with iModules. The engagements of the non-member record is not associated with the permanent record until the records is merged into the member record.

There are processes and procedures in place to merge non-member records with permanent member record that can be routinely run by iModules systems administrators within AAD. There are batch processes to merge and/or delete these non-member records along with a manual process that can be run as needed.

The goal is to merge non-member records with the member records to combine one complete engagement picture. However, the process for merging the records is manual and requires a fair amount of effort. As a result, it is important that we try to minimize the number of non-member records that are being created using options that are available in iModule. To the extent that they are created, we want to streamline the effort to get them merged.

Staff creating events have two options that can facilitate iModules non-member merges and maintain data integrity.

Either option is implemented by selecting a checkbox when creating the form. One option is called "Identity Checkpoint" and the other option is called "Pre-populate". iModules recommends that for most all forms, that one of the two options be checked.

Identity Checkpoint - As described by iModules, *"Identity Checkpoint is designed for use on public-facing forms (no login required). When enabled on a public-facing form, Identity Checkpoint attempts to match the e-mail address entered on the form with an existing e-mail address associated with a constituent or non-member record that already exists in the Encompass database."*

Pre-populate – As described by iModules, *"Pre-populate allows admins to send out email marketing communications that will pre-populate member data when recipients use links in the email to come back to a specific event, campaign or other form. It allows the transaction to be associated with the recipient's constituent record in the iModules database without requiring the user to be authenticated."*

One consideration is the user experience when selecting a form with either option. Both appear similar in aspects.

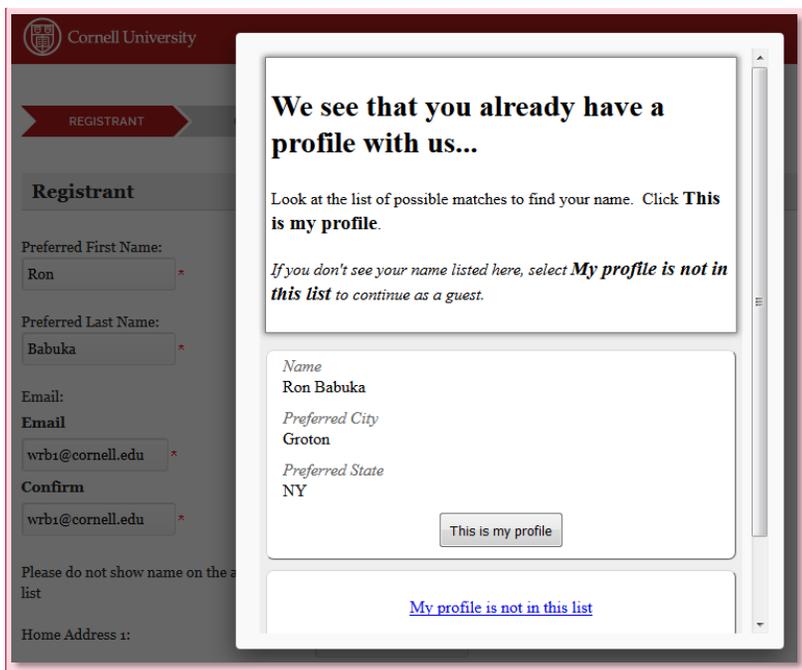
Identity Checkpoint – When a recipient opens a link to an event that has been configured to utilize Identity Checkpoint, the following sequence is experienced:

The screenshot shows the Cornell University registration interface. At the top is the Cornell University logo and name. Below it is a progress bar with three stages: REGISTRANT (highlighted in red), GUESTS, and FINISH. The main content area is titled "Registrant" and contains several input fields:

- Preferred First Name:** A text box containing "Ron" with a red asterisk to its right.
- Preferred Last Name:** A text box containing "Babuka" with a red asterisk to its right.
- Email:** A text box containing "wrb1@cornell.edu" with a red asterisk to its right.
- Confirm:** A text box containing "wrb1@cornell.edu" with a red asterisk to its right. A blue arrow points from this field to the text below.
- Privacy:** A checkbox labeled "Please do not show name on the attendee list" which is currently unchecked.

Identity Checkpoint 'keys' off from the e-mail address that must be on the registration page.

The recipient will be presented with a pop up window.



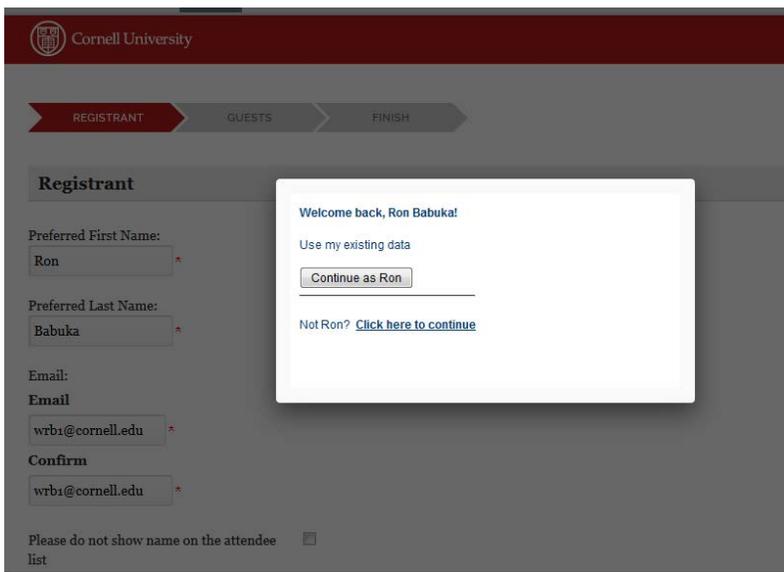
Commented [LS1]: I think we need to ask iModules to remove the "Preferred" in "Preferred City" and "Preferred State" in this popup if possible. In this context, "preferred" may not be meaningful to alumni.

Commented [RB2R1]:

All e-mail matches will be displayed for the recipient to select the profiles that best matches their profiles. Data points presented include preferred city, preferred state, and class year. The recipient is directed to select the button that best matches their profile, otherwise they should select the hyperlink.

Pre-populate – When a recipient opens a link to an event that has been configured to utilize Pre-populate, the following sequence is experienced:

The first thing that will happen is that the recipient will see the following pop-up window:



If they select "Continue as ..." the window will disappear and...

the fields will remain pre-populated with the information for the intended person.

REGISTRANT GUESTS FINISH

Registrant

Preferred First Name:
 *

Preferred Last Name:
 *

Email:
Email
 *

Confirm
 *

Please do not show name on the attendee list

However if the recipient selects the "Not <name>?", [Click here to continue](#)" link, they will continue on to the event form where and the pre-populated data will be removed.

Selecting Identity Checkpoint or Pre-populate:

When creating an event with Identity Checkpoint, check the box after opening up the Content Property for the event.

Toggle Advanced Mode

Event Name: *

Event Listing / Calendar: Use Ctrl or Shift keys to multi-select.

 *

Custom URL:

Enable Identity Checkpoint for this form ?

Do Not Save Form Data if the (non-logged in) user does not complete the form ?

Display breadcrumbs ?

Pre-populate user profile data from return link ?

When creating an event with Pre-populate, check the box
There is no need to select both.

Advantages and disadvantages:

Both tools require the recipients to read the pop-up windows and follow the guidelines in the windows.

Identity Checkpoint will require a merge process to be implemented by the AAD iModules Administrators to fully populate the member records. Additionally, the e-mail field must be placed on the first step of the form.

Pre-populate only works when used with e-mail marketing. Pre-populate also only works when emplids are used in the e-mails (either by a selection criteria or a .csv file of emplids). You **MUST** use the Hyperlink Manager tool in the e-mail module when pasting a link to a pre-populated event. (In general always use the Hyperlink Manager and always use the Image Manager when deploying that type of functionality as a rule).

Pre-populate will not create a non-member record that would need to be manually merged by AA&D staff. Pre-populate will allow one recipients data to be overwritten with another recipient's data if the following takes place. Recipient A forwards their e-mail to Recipient B, who then clicks on the link and **DOES NOT** select the "Not <name>, Click here to continue" hyper link. The data changes can be corrected when discovered.

Suggestions:

Events coordinators should ensure that at least ONE of the two options is selected.

If the event will be promoted iModules e-mail marketing, implement Pre-populate based on the user experience and limited data management effort.

If the event will be distributed via a non iModules e-mail system OR by cold links (Facebook) use Identity Checkpoint as Pre-populate will not work even if it is designated.

If both links and iModules e-mail marketing are to be used, check BOTH options. iModules will try to use pre-population functionality first. If that option is not available, iModules will try to use Identity Checkpoint functionality.

Commented [LS3]: Not seeing any advantages listed here? I think the advantage to pre-pop is that data captured in the event registration is automatically associated with the constituent in our database. Any changes they make to things like name/address/email are automatically sent to PeopleSoft the following day. Also – it prepopulates the information for the person completing the form, which makes for a more efficient experience. AAD iModules Administrators do not need to further do any merging.

On IdCheckpoint, the benefit is that there is still auto population of information (great for constituents). Forwarded emails are not a problem. However, AAD iModules Administrators have to manually merge the non-member records before they are sent to PS with any changes.

Commented [LS4]: I would also add the following suggestion – if you use pre-populate, make sure your email that contains the link says something like “this is a personalized link so it should not be forwarded to others – instead, share this other link if you would like to help socialize this event”

Helpful Links from iModules:

Regarding Pre-populate: <https://support.imodules.com/hc/en-us/articles/218261628-Pre-populate-Form-Data-from-an-Email-Link>

A webinar titled Identity Checkpoint vs Pre-populate:
<https://attendee.gotowebinar.com/recording/5639570332992843521>

Item	Identity Checkpoint	Pre-Populate
Non-member record created	Yes	No
Uses the member record	No	Yes
Updates profile data	Initially – No After merge – Yes	Yes
Logs the user in	No	Yes
Email Marketing is required	No	Yes
Admin approval is needed	Yes	No