

SCT Banner
Advancement
Gift Society

*Release 7.0
Date January 2005*



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Section A: Introduction

Overview

Workbook Goal The goal of this workbook is to provide you with the knowledge and practice to accurately create and assign gift societies in Banner.

This workbook is divided into four sections:

- Introduction
- Set-up
- Day-to-day operations
- Reference

Intended Audience Advancement Office Officers and Staff who are responsible for stewardship or who manage gift societies.

In this section These topics are covered in this section

Topic	Page
Process Introduction	A-2

Process Introduction

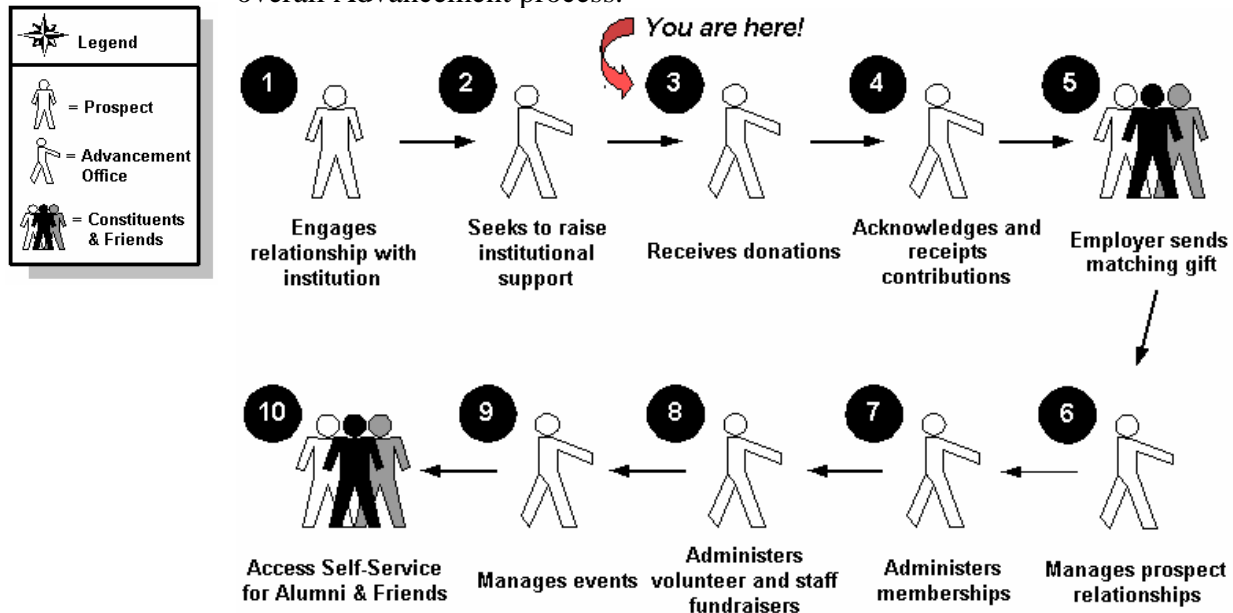
Introduction

Institutions like to recognize their donors for the contributions they have made. The Gift Society module allows you to automate the assignment of donors to the various giving clubs sponsored by your institution, based on rules you set up for each club, the Gift Society Assignment Process evaluates giving information for a donor and makes an assignment to the society. SCT Banner allows you to:

- Create memberships in the highest society for which your donors are eligible.
- Move donors to new levels based on additional giving within the society qualification period.
- Assign donors to multiple gift societies such as annual giving societies, athletic booster clubs and planned giving societies based on their giving.
- Track and maintain benefits and premiums associated with memberships.
- Store donor names suitable for Honor Roll publications.
- Create memberships manually when you want to recognize people and organizations who may not qualify for a society based on their financial contributions alone.

Flow Diagram

This diagram highlights the processes used to create gift societies within the overall Advancement process.



Continued on the next page

Process Introduction, Continued

About the process

The Gift Society process consists of the following steps:

- Establish validation values
 - Establish rules for each society
 - Process gifts and pledges
 - Finalize cashiering sessions
 - Run the Gift Society Assignment Process
 - Check memberships
-

Section B: Setup

Overview

Purpose The purpose of this section is to outline the process and detail the procedures to setup your SCT Banner system to automate the assignment of donors to the giving societies at your institution.

Intended audience Advancement Office employees who are responsible for stewardship or who manage gift societies.

Objectives At the end of this section, you will be able to

- setup a giving society to be system-assigned
- identify benefits/premiums associated with the society that will also be system-assigned.

Prerequisites To complete this workbook, you should have completed the SCT Education Practices computer-based training (CBT) tutorial “Banner 7.x Fundamentals,” or have equivalent experience navigating in the SCT Banner system.

In this section The following topics are covered in this section.

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Assignment Validation (ATVDCAM)

Introduction

The Assignment Validation Form (ATVDCAM) lets you define the valid data values that may be entered in the **Assignment** field on the Gift Society Membership Form (APADCLB) and the Membership Form (AAAMEMB). This value tells how or why the membership was assigned to a person/organization.

How to complete

The Assignment Validation Form should be accessed and the existing information should be reviewed. Anything pertaining to your institution that needs to be added or deleted can be done so via the **Insert** and **Delete Record** functions.

Source values are as follows:

M – Manual for the Membership Form

S – System

D – Dues

U – Manual for the Gift Society Membership Form

Assignment	Description	Source	Activity Date
CC	Computer Calculated	S	02-JAN-1991
DR	Decreased Recognition	U	06-JAN-1991
DU	Dues Recognition	D	18-DEC-1992
IR	Increased Recognition	U	06-JAN-1991
MB	Membership Recognition	M	18-DEC-1992
PR	Presidential Request	U	02-JAN-1991

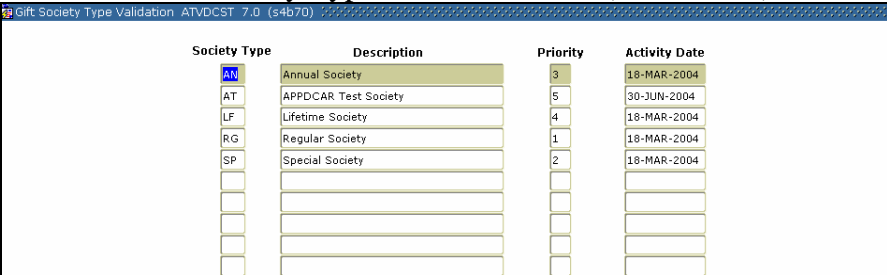
Gift Society Type Validation (ATVDCST)

Introduction

The Gift Society Type Validation Form (ATVDCST) maintains user-defined codes that identify the types of gift societies an institution tracks. A gift society type code is assigned to each gift society on the Gift Society Validation Form (ATVDCNP) to make sure that a donor is assigned to only one gift society within a type. The gift society type code appears on various forms where the gift society name is displayed.

Each society type is assigned a priority: the lower the number, the higher the priority. Society type priority is used to determine the highest level society for an individual/organization on the Gift Society Membership Form (APADCLB).

How to complete Follow these steps to complete the form.

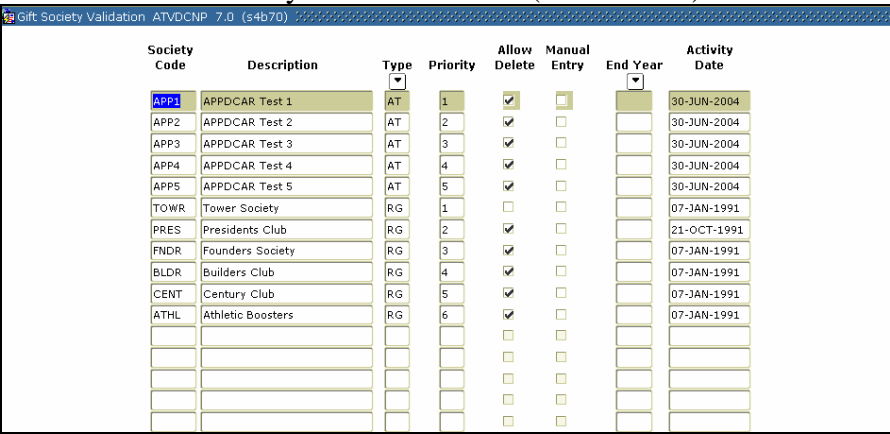
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Gift Society Validation (ATVDCNP)

Introduction

The Gift Society Validation Form (ATVDCNP) allows an institution to define the levels for its gift societies. The gift society code is validated when a gift society is assigned manually on the Gift Society Membership Form (APADCLB), when rules are setup for a gift society on the Gift Society Rule Form (APADCRL), and when default premiums are assigned to a gift society on the Gift Society Default Premiums Rule Form (APADCDP).

How to complete Follow these steps to complete the form.

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6	Click in the Allow Delete checkbox to signal to the program that additional giving will delete a previous lower assignment and the donor can be assigned to a higher level.																																																																																																																																								
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Benefits/Premiums Validation (ATVDCPR)

Introduction

The Benefits/Premiums Validation Form (ATVDCPR) lets you define codes, descriptions, and values for benefits and premiums to be associated with a constituent/organization in a gift society or a membership program.

Benefits/Premiums can be assigned to IDs

- manually on the Gift Society Membership Form (APADCLB) and automatically via the Gift Society Assignment Report (APPDCAR), using the Gift Society Default Premiums Rule Form (APADCDP).
- manually on the Gift Auxiliary Form (AGAGAUX).

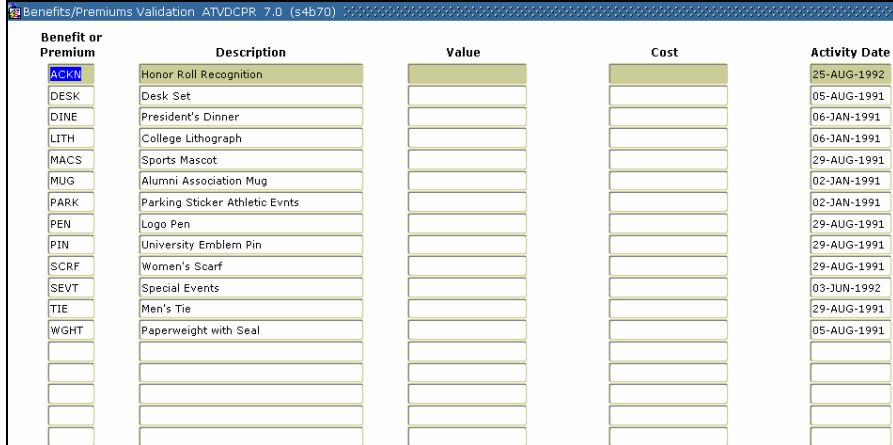
The Value and Cost columns are used in the revenue reconciliation of quid pro quo gifts. When a benefit/premium code is associated with a gift auxiliary code on the Auxiliary Code Validation form (ATVAUXL) and that auxiliary code is entered on AGAGAUX, values entered on ATVDCPR default into AGAGAUX as shown below:

Field on ATVDCPR		Field on AGAGAUX
Value	Fair market value of the benefit, premium, or service	Market Value
Cost	Cost to the institution of the benefit, premium, or service	Actual Value

Continued on the next page

Benefits/Premiums Validation (ATVDCPR), Continued

How to complete Follow these steps to complete the form.

Step	Action																																																																																										
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Gift Society Year Validation (ATVDCYR)


Introduction

The Gift Society Year Validation Form (ATVDCYR) lets you specify date ranges as gift society years. Some institutions base their rule on calendar giving, while others use their fiscal year. The Gift Society Membership Form (APADCLB), the Gift Society Default Premium Form (APADCDP), and the Gift Society Rule Form (APADCRL) use the gift society years you define.

The **Start Date** and **End Date** values must be entered in DD-MON-YYYY format; the end date must be more recent than the start date. Start and end dates cannot overlap from one year to the next.

Note: Use a society year code of 9999 to represent lifetime memberships; it will be recognized by the Gift Society Process (APPDCAR). Otherwise, the society year codes must be the actual year, e.g. 2005, because previous years and subsequent years are calculated by subtracting one and adding one to codes. The codes can only calculate correctly if they are in this format.

How to complete Follow these steps to complete the form.

Step	Action																																																																																																				
1	<p>Access the Gift Society Year Validation Form (ATVDCYR).</p>  <table border="1"> <thead> <tr> <th>Society Year</th> <th>Description</th> <th>Start Date</th> <th>End Date</th> <th>Activity Date</th> </tr> </thead> <tbody> <tr><td>1980</td><td>1980</td><td>01-JAN-1980</td><td>31-DEC-1980</td><td>06-JAN-1991</td></tr> <tr><td>1989</td><td>1989</td><td>01-JAN-1989</td><td>31-DEC-1989</td><td>02-JAN-1991</td></tr> <tr><td>1990</td><td>1990</td><td>01-JAN-1990</td><td>31-DEC-1990</td><td>06-JAN-1991</td></tr> <tr><td>1991</td><td>1991</td><td>01-JAN-1991</td><td>31-DEC-1991</td><td>06-JAN-1991</td></tr> <tr><td>1992</td><td>1992</td><td>01-JAN-1992</td><td>31-DEC-1992</td><td>06-JAN-1991</td></tr> <tr><td>1993</td><td>1993</td><td>01-JAN-1993</td><td>31-DEC-1993</td><td>09-JUN-1993</td></tr> <tr><td>1994</td><td>1994</td><td>01-JAN-1994</td><td>31-DEC-1994</td><td>09-JUN-1993</td></tr> <tr><td>1995</td><td>1995</td><td>01-JAN-1995</td><td>31-DEC-1995</td><td>09-JUN-1993</td></tr> <tr><td>1996</td><td>1996</td><td>01-JAN-1996</td><td>31-DEC-1996</td><td>09-JUN-1993</td></tr> <tr><td>1997</td><td>1997</td><td>01-JAN-1997</td><td>31-DEC-1997</td><td>09-JUN-1993</td></tr> <tr><td>1998</td><td>1998</td><td>01-JAN-1998</td><td>31-DEC-1998</td><td>09-JUN-1993</td></tr> <tr><td>1999</td><td>1999</td><td>01-JAN-1999</td><td>31-DEC-1999</td><td>09-JUN-1993</td></tr> <tr><td>2000</td><td>2000</td><td>01-JAN-2000</td><td>31-DEC-2000</td><td>04-JAN-1995</td></tr> <tr><td>2001</td><td>2001</td><td>01-JAN-2001</td><td>31-DEC-2001</td><td>04-JAN-1995</td></tr> <tr><td>2002</td><td>2002</td><td>01-JAN-2002</td><td>31-DEC-2002</td><td>04-JAN-1995</td></tr> <tr><td>2003</td><td>2003</td><td>01-JAN-2003</td><td>31-DEC-2003</td><td>04-JAN-1995</td></tr> <tr><td>2004</td><td>2004</td><td>01-JAN-2004</td><td>31-DEC-2004</td><td>04-JAN-1995</td></tr> <tr><td>2005</td><td>2005</td><td>01-JAN-2005</td><td>31-DEC-2005</td><td>04-JAN-1995</td></tr> <tr><td>9999</td><td>Lifetime</td><td>01-JAN-3000</td><td>31-DEC-3000</td><td>09-SEP-1997</td></tr> </tbody> </table>	Society Year	Description	Start Date	End Date	Activity Date	1980	1980	01-JAN-1980	31-DEC-1980	06-JAN-1991	1989	1989	01-JAN-1989	31-DEC-1989	02-JAN-1991	1990	1990	01-JAN-1990	31-DEC-1990	06-JAN-1991	1991	1991	01-JAN-1991	31-DEC-1991	06-JAN-1991	1992	1992	01-JAN-1992	31-DEC-1992	06-JAN-1991	1993	1993	01-JAN-1993	31-DEC-1993	09-JUN-1993	1994	1994	01-JAN-1994	31-DEC-1994	09-JUN-1993	1995	1995	01-JAN-1995	31-DEC-1995	09-JUN-1993	1996	1996	01-JAN-1996	31-DEC-1996	09-JUN-1993	1997	1997	01-JAN-1997	31-DEC-1997	09-JUN-1993	1998	1998	01-JAN-1998	31-DEC-1998	09-JUN-1993	1999	1999	01-JAN-1999	31-DEC-1999	09-JUN-1993	2000	2000	01-JAN-2000	31-DEC-2000	04-JAN-1995	2001	2001	01-JAN-2001	31-DEC-2001	04-JAN-1995	2002	2002	01-JAN-2002	31-DEC-2002	04-JAN-1995	2003	2003	01-JAN-2003	31-DEC-2003	04-JAN-1995	2004	2004	01-JAN-2004	31-DEC-2004	04-JAN-1995	2005	2005	01-JAN-2005	31-DEC-2005	04-JAN-1995	9999	Lifetime	01-JAN-3000	31-DEC-3000	09-SEP-1997
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3	Add or delete information via the Insert/Delete Record functions.																																																																																																				
4	Enter the year that specifies the code for a gift society year in the Society Year .																																																																																																				
5	Enter a free form text description in the Description field.																																																																																																				
6	Enter a date in the Start Date field.																																																																																																				

Continued on the next page

Gift Society Year Validation (ATVDCYR), Continued

How to complete, continued

Step	Action
7	Enter a date in the End Date field.
8	The Activity Date field will default. <u>Note</u> : Continue to add years until about 2020.
11	Click the Save icon.
12	Click the Exit icon.

Gift Society Rule Form (APADCRL)

Introduction

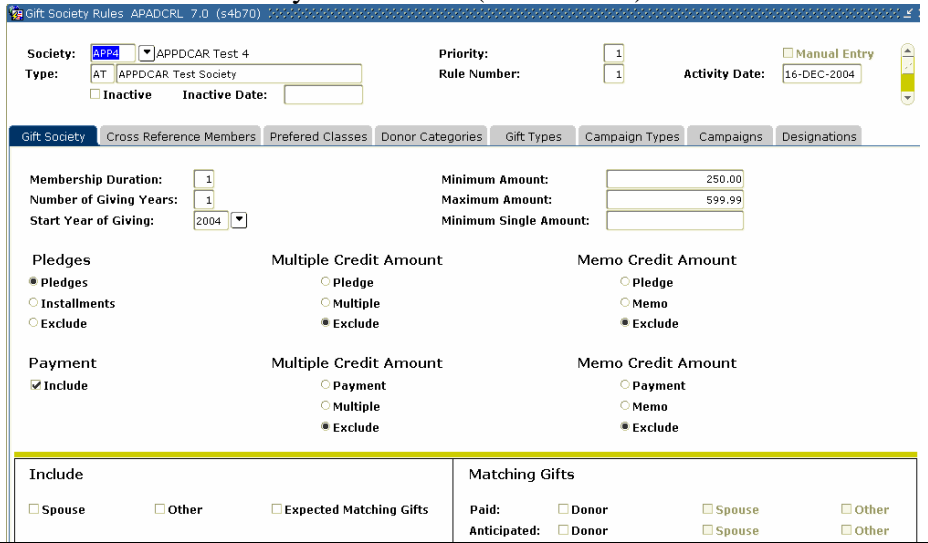
The Gift Society Rule Form (APADCRL) is the nuts and bolts of the gift society process. It is very important that the rules set here accurately define your institutional rules for obtaining membership in each society.

Chapter 4 (Processing) of the user manual is very helpful in determining which rules may apply to your institution. You should read it thoroughly in order to understand the process. Once these rules are set and have been tested extensively there should be no reason to adjust them unless your institution changes its recognition levels.

Remember that a person can qualify for only one society per society type per society year. A person may, however, qualify for more than one society of differing society types in the same fiscal year. *Example:* An institution may have the following society types: Annual Giving, Planned Giving, Lifetime Giving, and Athletic Giving. If Joe Donor gives a gift annuity to this institution and restricts his gift to Athletics, he will qualify for the Planned Giving society and the Athletic Giving society.

This is institution-specific. The institution should work with their Advancement Consultant to set these rules up according to the institutional rules for their giving societies.

How to complete Follow these steps to complete the form.

Step	Action
1	<p data-bbox="505 1188 1153 1220">Access the Gift Society Rules Form (APADCRL).</p>  <p>The screenshot shows a web form titled "Gift Society Rules Form (APADCRL)". At the top, there are fields for "Society" (dropdown menu with "APP4" selected), "Type" (dropdown menu with "AT" selected), "Priority" (input field with "1"), "Rule Number" (input field with "1"), and "Activity Date" (input field with "16-DEC-2004"). Below these are tabs for "Gift Society", "Cross Reference Members", "Preferred Classes", "Donor Categories", "Gift Types", "Campaign Types", "Campaigns", and "Designations". The main form area contains several sections: "Membership Duration" (input field with "1"), "Number of Giving Years" (input field with "1"), "Start Year of Giving" (dropdown menu with "2004"), "Minimum Amount" (input field with "250.00"), "Maximum Amount" (input field with "599.99"), and "Minimum Single Amount" (input field). There are three columns of radio button options: "Pledges" (Pledges, Installments, Exclude), "Multiple Credit Amount" (Pledge, Multiple, Exclude), and "Memo Credit Amount" (Pledge, Memo, Exclude). Below these are "Payment" options (Include, Exclude) and "Matching Gifts" options (Paid: Donor, Spouse, Other; Anticipated: Donor, Spouse, Other).</p>
2	Enter the society code in the Society field.

Continued on the next page

Gift Society Rule Form (APADCRL), Continued

How to complete, continued

Step	Action
3	Enter a number to indicate the rule priority in the Priority field.
4	The Type field will default from ATVDCNP. Required.
5	Perform a Next Block function.
6	Enter the Number of years of giving that comprises the qualification period in the Number of Giving Years field. Required.
7	Enter a year in the First Year of Giving field which is the first year of the qualification period. Optional.
8	Enter the minimum amount required for membership in the Minimum Amount field. Optional
9	Enter the Maximum amount for the gift society in the Maximum Amount field. Optional. <u>Note:</u> This amount is used in the Gift Society Assignment Report (APPDCAR).
10	If membership is based on a specific amount rather than a range, enter the Minimum amount required in the Minimum Single Amount field. Optional.
11	Click the Save icon.
12	The Activity Date field will default.
13	Consult <i>Chapter 4: Gift Society Processing-Chart of Gift Society Rule Window Indicator Settings</i> for the remaining indicators on this page. <u>Note:</u> This information is included in Appendix A.
14	Click on a tab to add additional criteria to a rule. In each window, select the appropriate button to include or exclude the entered values. These windows are optional.

Gift Society Default Premiums Rules (APADCDP)

Introduction

The Gift Society Default Premiums Rules Form (APADCDP) sets the default benefits for each society, each society type, or each type/society combination based on the society year.

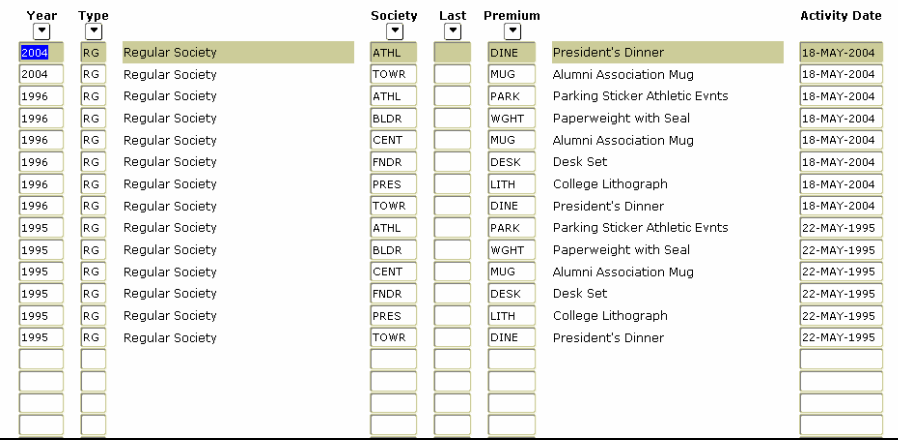
Set the values to answer this type of question: What benefits will Joe Donor receive in 2005 if his annual gift is \$X?

...if his gift is restricted to XXXXX ?

...if he gives a planned gift?

...if his lifetime giving is over \$X?

How to complete Follow these steps to complete the process.

Step	Action																																																																																										
1	<p>Access the Gift Society Default Premiums Rules Form (APADCDP).</p>  <table border="1"> <thead> <tr> <th>Year</th> <th>Type</th> <th>Society</th> <th>Last</th> <th>Premium</th> <th>Activity Date</th> </tr> </thead> <tbody> <tr> <td>2004</td> <td>RG</td> <td>Regular Society</td> <td>ATHL</td> <td>DINE</td> <td>18-MAY-2004</td> </tr> <tr> <td>2004</td> <td>RG</td> <td>Regular Society</td> <td>TOWR</td> <td>MUG</td> <td>18-MAY-2004</td> </tr> <tr> <td>1996</td> <td>RG</td> <td>Regular Society</td> <td>ATHL</td> <td>PARK</td> <td>18-MAY-2004</td> </tr> <tr> <td>1996</td> <td>RG</td> <td>Regular Society</td> <td>BLDR</td> <td>WGHT</td> <td>18-MAY-2004</td> </tr> <tr> <td>1996</td> <td>RG</td> <td>Regular Society</td> <td>CENT</td> <td>MUG</td> <td>18-MAY-2004</td> </tr> <tr> <td>1996</td> <td>RG</td> <td>Regular Society</td> <td>FNDR</td> <td>DESK</td> <td>18-MAY-2004</td> </tr> <tr> <td>1996</td> <td>RG</td> <td>Regular Society</td> <td>PRES</td> <td>LITH</td> <td>18-MAY-2004</td> </tr> <tr> <td>1996</td> <td>RG</td> <td>Regular Society</td> <td>TOWR</td> <td>DINE</td> <td>18-MAY-2004</td> </tr> <tr> <td>1995</td> <td>RG</td> <td>Regular Society</td> <td>ATHL</td> <td>PARK</td> <td>22-MAY-1995</td> </tr> <tr> <td>1995</td> <td>RG</td> <td>Regular Society</td> <td>BLDR</td> <td>WGHT</td> <td>22-MAY-1995</td> </tr> <tr> <td>1995</td> <td>RG</td> <td>Regular Society</td> <td>CENT</td> <td>MUG</td> <td>22-MAY-1995</td> </tr> <tr> <td>1995</td> <td>RG</td> <td>Regular Society</td> <td>FNDR</td> <td>DESK</td> <td>22-MAY-1995</td> </tr> <tr> <td>1995</td> <td>RG</td> <td>Regular Society</td> <td>PRES</td> <td>LITH</td> <td>22-MAY-1995</td> </tr> <tr> <td>1995</td> <td>RG</td> <td>Regular Society</td> <td>TOWR</td> <td>DINE</td> <td>22-MAY-1995</td> </tr> </tbody> </table>	Year	Type	Society	Last	Premium	Activity Date	2004	RG	Regular Society	ATHL	DINE	18-MAY-2004	2004	RG	Regular Society	TOWR	MUG	18-MAY-2004	1996	RG	Regular Society	ATHL	PARK	18-MAY-2004	1996	RG	Regular Society	BLDR	WGHT	18-MAY-2004	1996	RG	Regular Society	CENT	MUG	18-MAY-2004	1996	RG	Regular Society	FNDR	DESK	18-MAY-2004	1996	RG	Regular Society	PRES	LITH	18-MAY-2004	1996	RG	Regular Society	TOWR	DINE	18-MAY-2004	1995	RG	Regular Society	ATHL	PARK	22-MAY-1995	1995	RG	Regular Society	BLDR	WGHT	22-MAY-1995	1995	RG	Regular Society	CENT	MUG	22-MAY-1995	1995	RG	Regular Society	FNDR	DESK	22-MAY-1995	1995	RG	Regular Society	PRES	LITH	22-MAY-1995	1995	RG	Regular Society	TOWR	DINE	22-MAY-1995
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2	Enter a year in the Year field that specifies the beginning effective society year code.																																																																																										
3	Enter a code that specifies the society type code in the Type field.																																																																																										
4	Enter a code that specifies the gift society code in the Society field.																																																																																										
5	Enter a date the society year code premium rule becomes inactive in the Last field.																																																																																										
6	Enter a code that specifies the premium code to be automatically associated with the gift society based on the society type, effective society year and the gift society name in the Premium field.																																																																																										
7	The Activity Date field will default.																																																																																										
8	Click the Save icon.																																																																																										
9	Click the Exit icon.																																																																																										

Self Check

Directions

Match the Banner module from the list on the left with the description on the right. Try to do this without using your workbook notes.

- | | | |
|---|-------|--|
| a. Gift Society Type Validation Form | _____ | 1. Lets you define that valid data values that may be entered in the assignment field on the Gift society membership form and the membership form. |
| b. Gift Society Rule Form | _____ | 2. Maintains user-defined codes that identify the types |
| c. Gift Society Default Premiums Rules Form | _____ | 3. Sets the default benefits for each society type, or type/society combination. |
| d. Assignment Validation Form | _____ | 4. Sets the rules for previously names gift societies, and is the nuts-and-bolts of the gift society process. |
| e. Gift Society Year Validation Form | _____ | 5 Lets you specify date ranges as gift society years. |
-

Answer Key

a. Gift Society Type Validation Form	D	1. Lets you define that valid data values that may be entered in the assignment field on the Gift society membership form and the membership form.
b. Gift Society Rule Form	A	2. Maintains user-defined codes that identify the types
c. Gift Society Default Premiums Rules Form	C	3. Sets the default benefits for each society type, or type/society combination.
d. Assignment Validation Form	B	4. Sets the rules for previously names gift societies, and is the nuts-and-bolts of the gift society process.
e. Gift Society Year Validation Form	E	5 Lets you specify date ranges as gift society years.

Section C: Day-to-Day Operations

Overview

Purpose This course is intended to teach the participant to identify key forms, tables, and reports in the SCT Banner Advancement System. In addition, the student will learn to follow key processes and query tables.

Intended Audience Advancement Office staff who are responsible for managing the recognition program at your school.

Objectives At the end of this course, participants will be able to run and view the results of reports related to the Gift Society process.

Prerequisites To complete this workbook, you should have completed the SCT Education Practices computer-based training (CBT) tutorial “Banner 7.x Fundamentals,” or have equivalent experience navigating in the SCT Banner system.

In this section The following topics are covered in this section.

Topic	Page
Process Introduction	C-2
Gift Society Assignment Report (APPDCAR)	C-3
Gift Society Year to Date Report (AGPDCGL)	C-5
Gift Society Report (APPDCLB)	C-6
Gift Society Rules List Report (APPDCLS)	C-9
Viewing the Report Results	C-11
Self Check	C-13
Answer Key	C-14

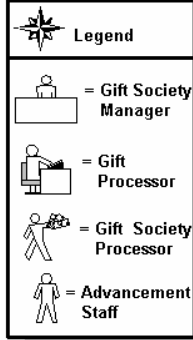
Process Introduction

About the process

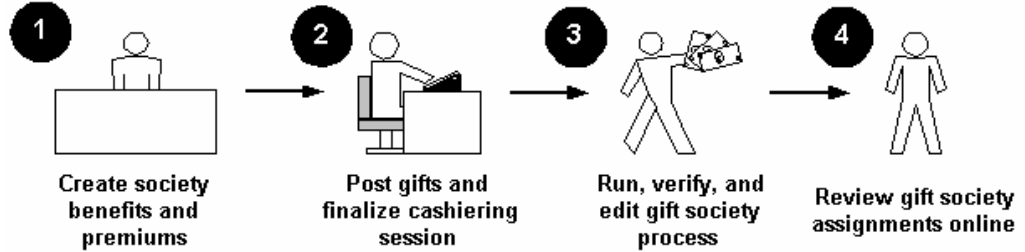
The Advancement office can create, maintain and view:

- gift society members and the societies that they belong to
- premiums and benefits given to society members
- membership lists and other reports.

Flow diagram



This diagram highlights the Gift Society process within the overall Advancement workflow.



What happens

The stages of the process are described in this table

Stage	Description
1	Create benefits and premiums that are associated with each society.
2	Post gifts and finalize cashiering session.
3	Run gift society process and verify and edit gift societies assigned.
4	Review individuals/organizations gift society assignment online.

Gift Society Assignment Report (APPDCAR)

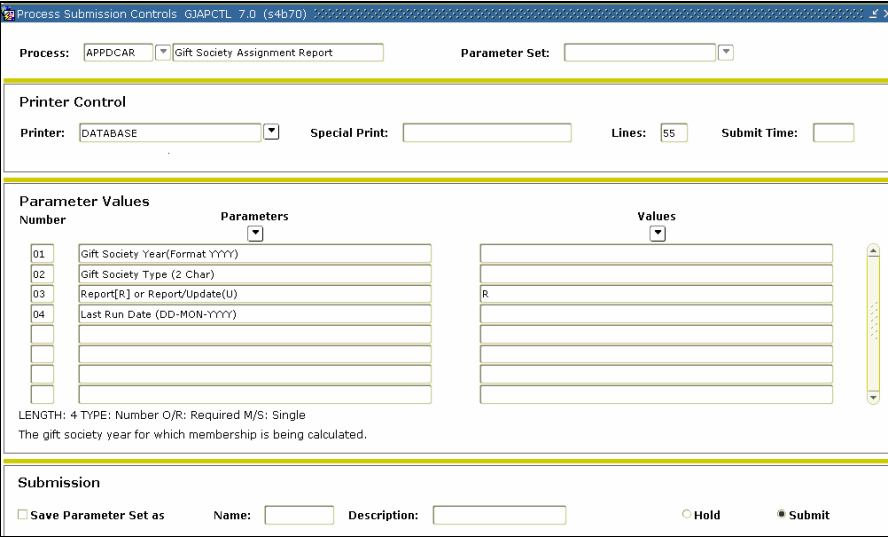
Introduction

On a regularly scheduled basis, run the Gift Society Assignment Report (APPDCAR) process from Job Submission. This process evaluates the gifts and pledge payments against the rules and flags each donor with the appropriate category.

The first time you run this report, it will take a long time to process. You should keep track of the last run date so that subsequent processing time will be reduced.

Procedure

Follow the steps to complete the procedure.

Step	Action	
1	<p>Access the Gift Society Assignment Report (APPDCAR) via the Process Submission Controls Form (GJAPCTL).</p> 	
2	<p>IF</p> <p>you want the output to appear on the screen</p> <p>you want the output printed out</p>	<p>THEN</p> <p>enter <i>Database</i> in the Printer field.</p> <p>select the printer.</p>
3	<p>Perform a Next Block function, until you access the Parameter Values block.</p>	
4	<p>Add the values for the Gift Society Year, the Gift Society Type and whether the report is to be run in Report or Update mode (parameters 01, 02 and 03).</p> <p><u>Note:</u> It is recommended to run in report mode first. This allows the user to determine if the process will assign gift societies properly based on the rule that were entered.</p>	

Continued on the next page

Gift Society Assignment Report (APPDCAR), Continued

Procedure, continued

Step	Action
5	Perform a Next Block function to access the Submission block.
6	Select the Submit radio button.
7	Click the Save icon.
8	When you are satisfied with the results, run the report in Update mode.

Gift Society Year to Date Report (AGPDCGL)

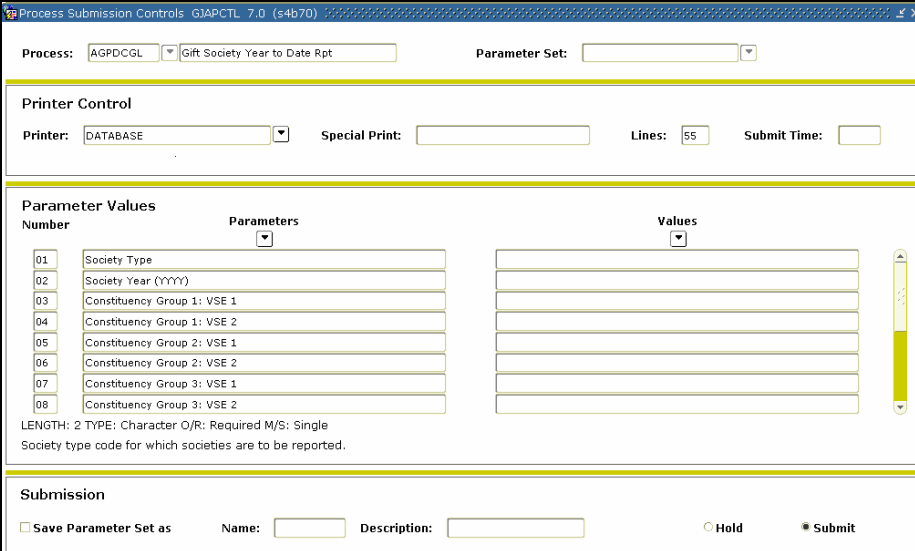
Introduction

The Gift Society Year to Date Report (AGPDCGL) summarizes the giving of members in a Gift Society type (via parameter) for four parameter-driven constituency groups. Each constituency group within each gift society reports the number of renewed donors and the number of new donors with the total members being subtotaled (i.e. new and renewed).

The report only looks at those donors whose primary donor category is of one of the four constituency groups defined as parameters.

Procedure

Follow these steps to complete the process.

Step	Action	
1	<p>Access the Gift Society Year to Date Report (AGPDCGL) via the Process Submission Controls Form (GJAPCTL).</p> 	
2	<p>IF you want the output to appear on the screen you want the output printed out</p>	<p>THEN enter <i>Database</i> in the Printer field. select the printer.</p>
3	Perform a Next Block function, until you access the Parameter Values block.	
4	The parameters will default in.	
5	Add the values for the Society Type, Society Year, etc.	
6	Perform a Next Block function to access the Submission block.	
7	Click the Submit radio button.	
8	Click the Save icon.	

Gift Society Report (APPDCLB)

Introduction

The Gift Society Report (APPDCLB) provides membership listings suitable for use in donor publications. The report may be selected for populations based on society membership, society year, donor category or class year.

Three print options are available for the report:

- A – Gift Society: sorted by gift society, alphabetical within society.
- B – Class Year: sorted by class year, gift society within a class, alphabetical within a gift society.
- C – Donor Code: sorted by donor category, gift society within donor category, and alphabetical within gift society.

The name printed on the report is determined by the following priority:

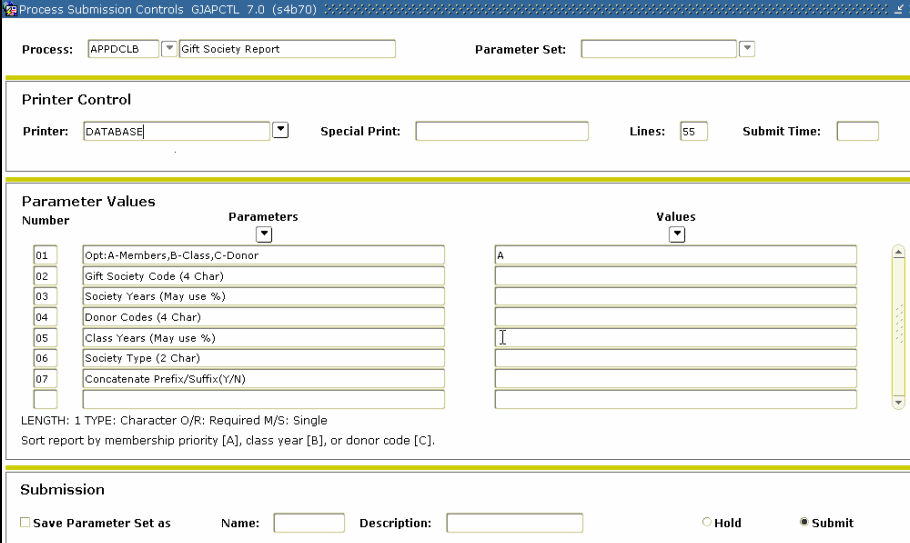
1. Constituents and Organizations: Society name from the Society Membership Form (APADCLB)
2. Constituents: Gift Society Name from the constituent/Organization Name Form (APANAME)
Organizations: Gift Society Name from the Constituent/Organization Name Form (APANAME)
3. Constituents only: Preferred Address Name from APANAME, using the concatenate parameter indicator.
4. Constituents and Organizations: Name on the Advancement Identification Form (APAIDEN), concatenated with the prefix and suffix from the Current Information block on that same form.

Continued on the next page

Gift Society Report (APPDCLB), Continued

Procedure

Follow the steps to complete the procedure.

Step	Action						
1	<p>Access the Gift Society Report (APPDCLB) via the Process Submission Controls Form (GJAPCTL).</p>  <p>The screenshot shows the 'Process Submission Controls' form. At the top, there are dropdown menus for 'Process' (set to APPDCLB) and 'Gift Society Report'. Below that is a 'Printer Control' section with a 'Printer' dropdown (set to DATABASE), a 'Special Print' field, 'Lines' set to 55, and a 'Submit Time' field. The 'Parameter Values' section is a table with 7 rows. The first row has parameter '01' with value 'A'. Below the table are instructions: 'LENGTH: 1 TYPE: Character O/R: Required M/S: Single' and 'Sort report by membership priority [A], class year [B], or donor code [C]'. At the bottom is a 'Submission' section with a 'Save Parameter Set as' checkbox, 'Name' and 'Description' fields, and 'Hold' and 'Submit' radio buttons.</p>						
2	<table border="1"> <thead> <tr> <th data-bbox="526 1024 959 1056">IF</th> <th data-bbox="971 1024 1404 1056">THEN</th> </tr> </thead> <tbody> <tr> <td data-bbox="526 1062 959 1136">you want the output to appear on the screen</td> <td data-bbox="971 1062 1404 1136">enter <i>Database</i> in the Printer field.</td> </tr> <tr> <td data-bbox="526 1142 959 1173">you want the output printed out</td> <td data-bbox="971 1142 1404 1173">select the printer.</td> </tr> </tbody> </table>	IF	THEN	you want the output to appear on the screen	enter <i>Database</i> in the Printer field.	you want the output printed out	select the printer.
IF	THEN						
you want the output to appear on the screen	enter <i>Database</i> in the Printer field.						
you want the output printed out	select the printer.						
3	Perform a Next Block function, until you access the Parameter Values block.						

Continued on the next page

Gift Society Report (APPDCLB), Continued

Procedure, continued

Step	Action		
4	Add the values as follows:		
	Parameter	Value	Required
	Option	A – Sorts Membership by priority B – Sorts by class Year C – Sorts by Donor code	Yes
	Gift Society Code	Gift Society Validation Form (ATVDCNP)	No
	Society Years	Gift Society Year Validation Form (ATVDCYR)	No
	Donor Codes	Donor Category Validation Form (ATVDONR)	No
	Class Years	Preferred classes	No
	Society Type	Gift Society Type Validation Form (ATVDCST)	No
	Concatenate Prefix / Suffix to Preferred Address Name	<p><i>Y</i> - Concatenates the prefix/suffix from APAIDEN to the preferred Address Name on APANAME. If there is no Preferred Address name on APANAME, the APAIDEN prefix/suffix will be concatenated to the name on APAIDEN</p> <p><i>N</i> – Uses the Preferred Address Name on APANAME. If there is no Preferred Address Name on APANAME, uses the name on APAIDEN.</p>	No
5	Perform a Next Block function to access the Submission block.		
6	Click the Submit radio button.		
7	Click the Save icon.		

Gift Society Rules List Report (APPDCLS)

Introduction

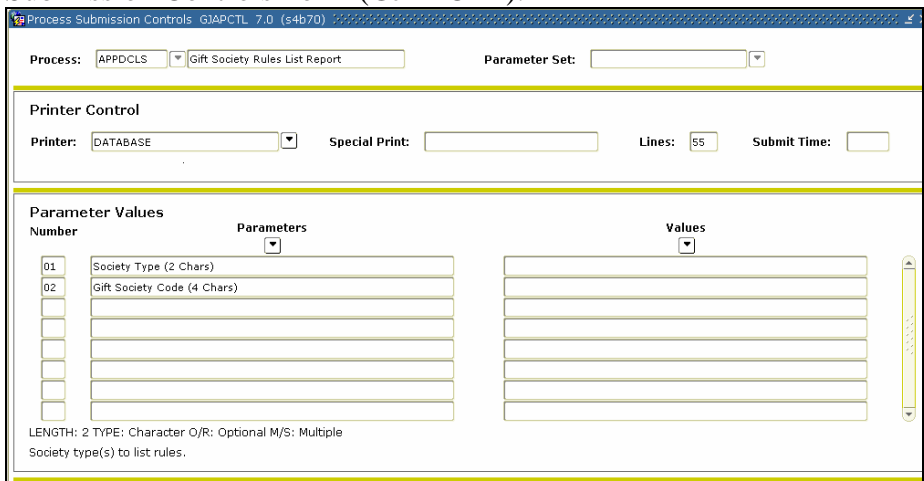
The Gift Society Rules List Report lists the rules for gift societies that have been established on the Gift Society Rule Form.

Note: You should run and print this report before you change the rules for a gift society just in case you need to restore the original rules.

IF	THEN
both parameters are left blank	rules for all societies and all types will be included.
the society type parameter is entered and the Gift Society Name is left blank	rules for all societies having the types entered will be selected.
the gift society name parameter is entered and the Society type parameter is left blank	rules for all societies entered will be selected, regardless of their type.
both parameters are entered	then only the rules for societies having both the type and the name entered will be selected.

Procedure

Follow these steps to complete the procedure.

Step	Action
1	<p>Access the Gift Society Rules List Report (APPDCLS) via the Process Submission Controls Form (GJAPCTL).</p>  <p>The screenshot shows the GJAPCTL form interface. At the top, it displays 'Process Submission Controls GJAPCTL 7.0 (s4b70)'. Below this, there are fields for 'Process:' (set to APPDCLS) and 'Gift Society Rules List Report', and a 'Parameter Set:' dropdown. The 'Printer Control' section includes a 'Printer:' dropdown (set to DATABASE), 'Special Print:', 'Lines:' (set to 55), and 'Submit Time:'. The 'Parameter Values' section has a table with columns for 'Number', 'Parameters', and 'Values'. The first two rows are pre-filled: '01 Society Type (2 Chars)' and '02 Gift Society Code (4 Chars)'. Below the table, it specifies 'LENGTH: 2 TYPE: Character O/R: Optional M/S: Multiple Society type(s) to list rules.' The 'Submission' section at the bottom has 'Save Parameter Set as' checked, and fields for 'Name:' and 'Description:'. There are also 'Hold' and 'Submit' radio buttons.</p>

Continued on the next page

Gift Society Rules List Report (APPDCLS), Continued

Procedure, continued

Step	Action	
2	Perform a Next Block function.	
3	IF	THEN
	You want the output to appear on the screen	Enter <i>Database</i> in the Printer field.
	You want the output printed out.	Select the printer.
4	Perform a Next Block function to access the Parameter Values box.	
5	Click in the Values field.	
6	Click the Search icon to assign values to the parameter (if necessary).	
7	Perform a Next Block to access the Submission block.	
8	Click the Submit radio button.	
9	Click the Save icon.	

Viewing the Report Results

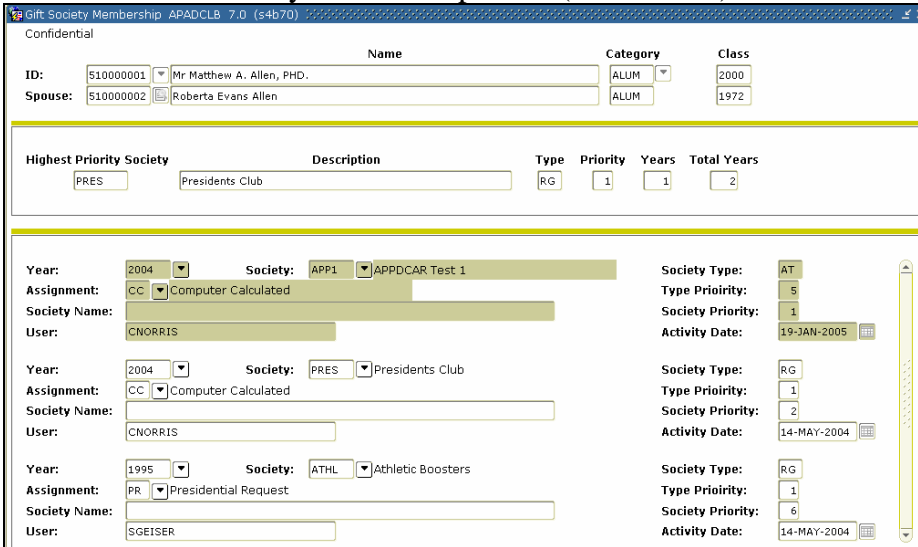
Introduction

Once the assignment process has been run, you can view the results for a constituent on Gift Society Membership Form (APADCLB). This form will display the current gift societies that exist for a donor and will change accordingly as the donor's giving increases.

Manual gift society changes can be made on this form. If deletions are allowed for a gift society (as set by ATVDCNP), you may also delete societies for a donor here. Donors that are manually entered will not be deleted, but if a donor later qualifies for a higher society, then it will list them appropriately. For example, if someone has donated time but not money, you can manually add them to a gift society to be recognized.

Procedure

Follow these steps to complete the procedure.

Step	Action
1	<p data-bbox="508 827 1242 856">Access the Gift Society Membership Form (APADCLB).</p>  <p>The screenshot shows the 'Gift Society Membership APADCLB 7.0 (s4b70)' form. It includes fields for ID, Spouse, Name, Category, and Class. Below this is a table of 'Highest Priority Society' with columns for Description, Type, Priority, Years, and Total Years. At the bottom, there are three rows of society details, each with fields for Year, Assignment, Society Name, User, Society Type, Type Priority, Society Priority, and Activity Date.</p>
2	<p data-bbox="508 1404 1284 1476">Perform a Next Block function to view the latest gift society assignment.</p>
3	<p data-bbox="508 1482 1421 1623">If the gift society name needs to be different than the name in the Gift Society Name field on the Advancement Individual/Organization Name Form (APANAME) or in the ID field in the key block, enter the new name at the bottom of the form.</p> <p data-bbox="508 1665 1421 1770"><u>Note:</u> Updating a name on this form will apply to the selected membership only; update the APANAME form if you wish to change the Gift Society Name for all future memberships.</p>
4	<p data-bbox="508 1776 768 1806">Click the Save icon.</p>

Continued on the next page

Self Check

Directions

Match the Banner module from the list on the left with the description on the right. Try to do this without using your workbook notes.

- | | | |
|-------------------------------------|-------|---|
| a. Gift Society Assignment Report | _____ | 1. Lists the rules for gift societies that have been established on the Gift Society Rules Form. |
| b. Gift Society Year to Date Report | _____ | 2. Evaluates the gifts and pledge payment against the rules and flags each donor with the appropriate category. |
| c. Gift Society Rules List report | _____ | 3. Summarizes the giving of members in a gift society type for four parameter driven constituency groups. |
-

Answer Key

a. Gift Society Assignment Report	c	1. Lists the rules for gift societies that have been established on the Gift Society Rules Form.
b. Gift Society Year to Date Report	a.	3. Evaluates the gifts and pledge payment against the rules and flags each donor with the appropriate category.
d. Gift Society Rules List report	b.	4. Summarizes the giving of members in a gift society type for four parameter driven constituency groups.

Section D: Reference

Overview

Purpose The purpose of this section is to provide reference materials related to the workbook.

In this section These topics are covered in this section.

Topic	Page
Setup Forms and Where Used	D-2
Day-to-Day Forms and Setup Needed	D-3
Forms Job Aid	D-4

Setup Forms and Where Used

Purpose Use this table as a guide to the setup forms and the day-to-day forms that use them.

Setup Form		Day-to-Day Form(s)	
Form Name	Code	Form Name	Code
Assignment Validation	ATVDCAM		
Gift Society Validation	ATVDCNP	Gift Society Report	APPDCLB
		Gift Society Rules List Report	APPDCLS
Benefits/Premiums Validation	ATVDCPR		
Gift Society Type Validation	ATVDCST	Gift Society Assignment Report	APPDCAR
		Gift Society Year to Date Report	AGPDCGL
		Gift Society Report	APPDCLB
		Gift Society Rules List Report	APPDCLS
Gift Society Year Validation	ATVDCYR	Gift Society Assignment Report	APPDCAR
		Gift Society Year to Date Report	AGPDCGL
		Gift Society Report	APPDCLB
		Gift Society Rules List Report	APPDCLS
Gift Society Rule Form	APADCRL		
Gift Society Default Premiums Rules	APADCDP		

Day-to-Day Forms and Setup Needed

Purpose Use this table as a guide to the day-to-day forms and the setup forms needed for each.

Day-to-Day Form	Setup Forms Needed
Gift Society Assignment Report (APPDCAR)	<ul style="list-style-type: none"> • Gift Society Year Validation (ATVDCYR) • Gift Society Type Validation (ATVDCST)
Gift Society Year to Date Report (AGPDCGL)	<ul style="list-style-type: none"> • Gift Society Type Validation (ATVDCST) • Gift Society Year Validation (ATVDCYR)
Fiscal Year Giving Comparison Report (AGPGCOM)	<ul style="list-style-type: none"> •
Gift Society Report (APPDCLB)	<ul style="list-style-type: none"> • Gift Society Validation (ATVDCNP) • Gift Society Year Validation (ATVDCYR) • Donor Category Code Validation (ATVDONR) • Gift Society Type Validation (ATVDCST)
Gift Society Rules List Report (APPDCLS)	<ul style="list-style-type: none"> • Gift Society Type Validation (ATVDCST) • Gift Society Validation (ATVDCNP)

Forms Job Aid

Purpose

Use this table as a guide to the forms used in this workbook. The Owner column may be used as a way to designate the individual(s) responsible for maintaining a form.

Form Name	Form Description	Owner
ATVDCAM	Assignment Validation	
ATVDCNP	Gift Society Validation	
ATVDCPR	Benefits/Premiums Validation	
ATVDCST	Gift Society Type Validation	
ATVDCYR	Gift Society Year Validation	
APADCRL	Gift Society Rule Form	
APADCDP	Gift Society Default Premiums Rules	
APPDCAR	Gift Society Assignment Report	
AGPDCGL	Gift Society Year to Date Report	
AGPGCOM	Fiscal Year Giving Comparison Report	
APPDCLB	Gift Society Report	
APPDCLS	Gift Society Rules List Report	

Release Date

This workbook was last updated on 8/10/2004.

Appendix A

Pledges	Mult. ID	Memo	Payments	Mult. ID	Memo	Matching Gift	Anticipated MG	Spouse	Matching Gift	Anticipated MG	Other Xref	Matching Gift	Anticipated MG	↖ When the indicators on p.1 of APADCRL are set like this (left), ↘ the amounts included in the key IDs giving are calculated like this (below)
P/I			Y											Unpaid portions only of pledge or installment amounts are included as set up by Pledges Multiple and Memo indicators; Payments are included as set up by the Payments Multiple and Memo indicators.
Pledges may be entered in conjunction with payments. See the appropriate box for an explanation of amounts.			Y											all payments (one-time gifts, pledge payments)
			Y	P										full payment amounts plus: full amount of payments from which key ID is multiplied
			Y	M										(full payment amount - amount key ID has multiplied to others) plus: payment amounts multiplied to key ID
			Y		P									full payment amounts plus: full amount of payments from which key ID is memoed, not including matching gift payments
			Y		M									full payment amounts plus: payment amounts memoed to key ID, not including matching gift payments
			Y	P	P									full payment amounts plus: full amount of payments from which the key ID is multiplied; full amount of payments from which the key ID is memoed, not including matching gift payments
			Y	M	M									(full payment amount - amount key ID has multiplied to others) plus: amounts multiplied to key ID; amounts memoed to key ID, not including matching gift payments
			Y	P	M									full payment amounts plus: full amount of payments from which key ID is multiplied; amounts memoed to key ID, not including matching gift payments

Pledges	Mult. ID	Memo	Payments	Mult. ID	Memo	Matching Gift	Anticipated MG	Spouse	Matching Gift	Anticipated MG	Other Xref	Matching Gift	Anticipated MG	When the indicators on p.1 of APADCRL are set like this (left), the amounts included in the key IDs giving are calculated like this (below)
			Y	M	P									(full payment amounts - amount key ID has multiplied to others) plus: amounts multiplied to key ID full amount of payments from which key ID is memoed, not including matching gift payments
MG and Anticipated MG apply to Payments only, and not to Pledges			Y			Y								full payment amounts plus: just paid matching gifts
			Y				Y							full payment amounts plus: just anticipated matching gifts
			Y			Y	Y							
Pledges and/or Payments <i>must</i> be entered before Spouse and Other Xref can be entered. Spouse and Other Cross Reference (and their associated matching and anticipated matching gifts) apply to Payments only. Only spouse and other cross reference gifts, and not amounts memoed or multiplied to spouse and/or other cross reference IDs, will be included.								Y						** all eligible amounts for a spouse ID
								Y	Y					** all eligible spouse amounts plus: all matching gifts paid to the spouse ID
								Y		Y				** all eligible spouse amounts plus: all anticipated matching gifts for the spouse ID
								Y	Y	Y				** all eligible spouse amounts *t plus: the larger of spouse anticipated matching gift amounts and paid spouse matching gifts
								Y					t all eligible amounts from cross references	
								Y	Y				t all eligible cross reference amounts t plus: all paid matching gift amounts for cross references	
								Y		Y			t all eligible cross reference amounts t plus: all anticipated matching gifts for cross references	
								Y	Y	Y			t all eligible cross reference amounts *t plus: the larger of other cross reference anticipated matching gift amounts and paid cross reference matching gifts	
<p>* Matching gift amounts received in different society years than the original employee gift will be counted twice.</p> <p>** For more information on establishing rules for spouse giving, see "Spouse Giving and Gift Society Processing."</p> <p>t Cross references are identified in the Cross Reference Members Block.</p>														

Sample Society Rule Window Indicator Combinations

Shown below are indicator combinations from the Gift Society Rule Form (APADCRL) for a few common membership scenarios. To use indicators to create other scenarios, refer to the indicator explanations and chart. To create memberships for:

Key ID and Spouse, using gift amounts multiplied to the spouse from the key ID:

Pledges	<i>Exclude</i>
Multiple	<i>Exclude</i>
Memo Amount	<i>Exclude</i>
Payment	<i>Include</i>
Multiple	<i>Payment</i>
Memo Amount	<i>Exclude</i>
Spouse	Not Checked
Other	Not Checked
Matching Gifts	
Donor	Not Checked
Spouse	Not Checked
Other	Not Checked

On the Cross Reference Members window:

Xref contains *SPS* (Spouse) and **Create Membership** is checked

Key ID and Spouse, using spouse gifts entered as distinct gifts:

Pledges	<i>Install</i>
Multiple	<i>Exclude</i>
Memo Amount	<i>Exclude</i>
Payment	<i>Include</i>
Multiple	<i>Multiple</i>
Memo Amount	<i>Memo</i>
Spouse	Checked
Other	Not Checked
Matching Gifts	
Donor	<i>Paid</i>
Spouse	<i>Paid</i>
Other	Not Checked

On the Cross Reference Members window:

Xref contains *SPS* (Spouse) and **Create Membership** is checked

Continued on the next page

Sample Society Rule Window Indicator Combinations, Continued

Key ID and Spouse, using multiple amounts for spouse and anticipated matching gifts:

Pledges	<i>Exclude</i>
Multiple	<i>Exclude</i>
Memo Amount	<i>Exclude</i>
Payment	<i>Include</i>
Multiple	<i>Payment</i>
Memo Amount	<i>Exclude</i>
Spouse	Not Checked
Other	Not Checked
Matching Gifts	
Donor	<i>Anticipated</i>
Spouse	Not Checked
Other	Not Checked

On the Cross Reference Members window:

Xref contains *SPS* (Spouse) and **Create Membership** is checked

Key ID and Spouse, using multiple amounts for spouse from pledges, gifts, and anticipated matching gifts:

Pledges	<i>Pledges</i>
Multiple	<i>Pledge</i>
Memo Amount	<i>Exclude</i>
Payment	<i>Include</i>
Multiple	<i>Payment</i>
Memo Amount	<i>Exclude</i>
Spouse	Not Checked
Other	Not Checked
Matching Gifts	
Donor	<i>Anticipated</i>
Spouse	Not Checked
Other	Not Checked

Continued on the next page

Sample Society Rule Window Indicator Combinations, Continued

On the Cross Reference Members window:

Xref contains *SPS* (Spouse) and **Create Membership** is checked
*Key ID and spouse, using gift amounts and matching gift payments
once the matching gift payment is received. Spouse receives 50%
Multiple ID credit.*

Pledges	<i>Exclude</i>
Multiple	<i>Exclude</i>
Memo Amount	<i>Exclude</i>
Payment	<i>Include</i>
Multiple	<i>Payment</i>
Memo Amount	<i>Exclude</i>
Spouse	Not Checked
Other	Not Checked
Matching Gifts	
Donor	<i>Paid</i>
Spouse	Not Checked
Other	Not Checked

On the Cross Reference Members window:

Xref contains *SPS* (Spouse) and **Create Membership** is checked
*Key ID and spouse, using gift amounts that are multiplied to the
spouse, anticipated matching gift payments, and other memo credit
that is received.*

Pledges	<i>Exclude</i>
Multiple	<i>Exclude</i>
Memo Amount	<i>Exclude</i>
Payment	<i>Include</i>
Multiple	<i>Payment</i>
Memo Amount	<i>Memo</i>
Spouse	Not Checked
Other	Not Checked
Matching Gifts	
Donor	<i>Anticipated</i>
Spouse	Not Checked
Other	Not Checked

Continued on the next page

Sample Society Rule Window Indicator Combinations, Continued

On the Cross Reference Members window:

Xref contains *SPS* (Spouse) and **Create Membership** is checked
*Key ID and spouse, using gift amounts that are multiplied to the
spouse and other memo credit that is received. Neither matching gift
payments nor anticipated matching gift payments are included.*

Pledges	<i>Exclude</i>
Multiple	<i>Exclude</i>
Memo Amount	<i>Exclude</i>
Payment	<i>Include</i>
Multiple	<i>Payment</i>
Memo Amount	<i>Memo</i>
Spouse	Not Checked
Other	Checked
Matching Gifts	
Donor	<i>Anticipated</i>
Spouse	Not Checked
Other	Not Checked

On the Cross Reference Members window:

Xref contains *SPS* (Spouse) and **Create Membership** is checked
