

Banner Advancement Gift Society Training Workbook

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Section A: Introduction

Lesson: Overview

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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.

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Section A: Introduction

Lesson: Process Introduction

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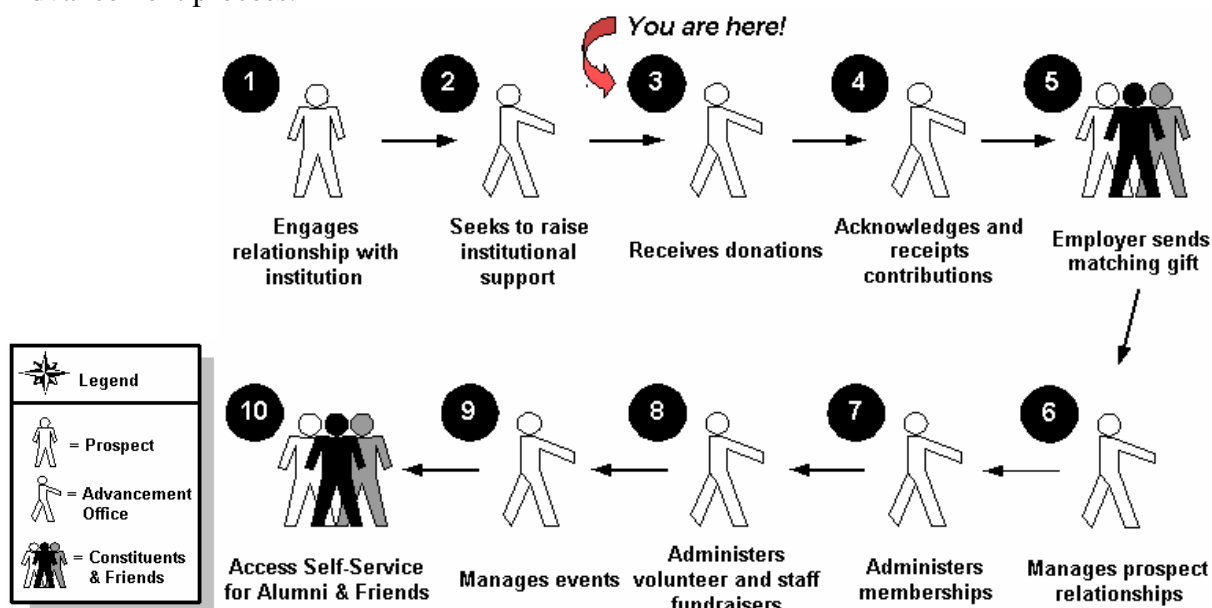
Introduction

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. 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.





Section A: Introduction

Lesson: Process Introduction (Continued)

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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: Set Up

Lesson: Overview

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Introduction

The purpose of this section is to outline the process and detail the procedures to setup your 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 Education Practices computer-based training (CBT) tutorial *Banner 7 Fundamentals*, or have equivalent experience navigating in the Banner system.

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Section B: Set Up

Lesson: Assignment Validation (ATVDCAM)

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Purpose

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.

Banner 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

Procedure

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



Section B: Set Up

Lesson: Gift Society Type Validation (ATVDCST)

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Purpose

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).

Banner form

Society Type	Description	Priority	Activity Date
AN	Annual Society	3	18-MAR-2004
AT	APPDCAR Test Society	5	30-JUN-2004
LF	Lifetime Society	4	18-MAR-2004
RG	Regular Society	1	18-MAR-2004
SP	Special Society	2	18-MAR-2004

Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Gift Society Type Validation Form (ATVDCST).
2	Review existing information.
3	Add or delete information using the Insert/Delete Record functions.
4	Select a type from the LOV to be entered in the Society Type field.
5	Enter a free form text description in the Description field.
6	Enter a number in the Priority field.
7	The Activity Date field will default.
8	Click the Save icon.
9	Click the Exit icon.



Section B: Set Up

Lesson: Gift Society Validation (ATVDCNP)

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Purpose

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).

Banner form

Society Code	Description	Type	Priority	Allow Delete	Manual Entry	End Year	Activity Date
APP1	APPDCAR Test 1	AT	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		30-JUN-2004
APP2	APPDCAR Test 2	AT	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		30-JUN-2004
APP3	APPDCAR Test 3	AT	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>		30-JUN-2004
APP4	APPDCAR Test 4	AT	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>		30-JUN-2004
APP5	APPDCAR Test 5	AT	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>		30-JUN-2004
TOWR	Tower Society	RG	1	<input type="checkbox"/>	<input type="checkbox"/>		07-JAN-1991
PRES	Presidents Club	RG	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		21-OCT-1991
FNDR	Founders Society	RG	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>		07-JAN-1991
BLDR	Builders Club	RG	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>		07-JAN-1991
CENT	Century Club	RG	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>		07-JAN-1991
ATHL	Athletic Boosters	RG	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>		07-JAN-1991
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		
				<input type="checkbox"/>	<input type="checkbox"/>		

Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Gift Society Validation Form (ATVDCNP).
2	Review existing information.
3	Add or delete information via the Insert/Delete Record functions.
4	Select a code from the LOV to be entered in the Type field.
5	Enter a number in the Priority field to define the priority of the giving society levels. <u>Note:</u> The lower the number; the higher the priority.
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.
7	Click in the Manual Entry checkbox only if the giving levels are to be manually assigned. <u>Note:</u> This is useful for clubs where eligibility is varied, or rules are difficult to define.



Section B: Set Up

Lesson: Gift Society Validation (ATVDCNP) (Continued)

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Procedure, continued

Step	Action
8	Enter a year in the End Year field that indicates the year that the gift society program will end and no new members can be assigned.
9	Click the Save icon.
10	Click the Exit icon.



Section B: Set Up

Lesson: Benefits/Premiums Validation (ATVDCPR)

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Purpose

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



Section B: Set Up

Lesson: Benefits/Premiums Validation (ATVDCPR) (Continued)

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Banner form

Benefit or Premium	Description	Value	Cost	Activity Date
ACKN	Honor Roll Recognition			25-AUG-1992
DESK	Desk Set			05-AUG-1991
DINE	President's Dinner			06-JAN-1991
LITH	College Lithograph			06-JAN-1991
MACS	Sports Mascot			29-AUG-1991
MUG	Alumni Association Mug			02-JAN-1991
PARK	Parking Sticker Athletic Evnts			02-JAN-1991
PEN	Logo Pen			29-AUG-1991
PIN	University Emblem Pin			29-AUG-1991
SCRF	Women's Scarf			29-AUG-1991
SEVT	Special Events			03-JUN-1992
TIE	Men's Tie			29-AUG-1991
WGHT	Paperweight with Seal			05-AUG-1991

Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Benefits/Premiums Validation Form (ATVDCPR).
2	Review existing information.
3	Add or delete information using the Insert/Delete Record functions.
4	Enter the code for the gift society premium in the Benefit or Premiums field.
5	Enter a free form text description in the Description field.
6	Enter a dollar value associated with benefit/premium code in the Value field.
7	Enter the cost of the premium to the institution in the Cost field.
8	The activity date field will default.
9	Click the Save icon.
10	Click the Exit icon.



Section B: Set Up

Lesson: Gift Society Year Validation (ATVDCYR)

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Purpose

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.

Banner form

Society Year	Description	Start Date	End Date	Activity Date
1900	1900	01-JAN-1900	31-DEC-1900	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



Section B: Set Up

Lesson: Gift Society Year Validation (ATVDCYR) (Continued)

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Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Gift Society Year Validation Form (ATVDCYR).
2	Review all existing information.
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.
7	Enter a date in the End Date field.
8	The Activity Date field will default. Note: Continue to add years until about 2020.
9	Click the Save icon.
10	Click the Exit icon.



Section B: Set Up

Lesson: Gift Society Rule Form (APADCRL)

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Purpose

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.

Note: Previously, gifts and payments were treated the same in rules – if you included pledge payments in a particular rule, you automatically included one-time gifts. Now, gifts and pledge payments have been separated so that you can define rules to treat them differently.



Section B: Set Up

Lesson: Gift Society Rule Form (APADCRL) (Continued)

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Banner form

Gift Society Rules APADCRL 7.3 (s4b70)					
Society:	APP1	APPDCAR Test 1	Priority:	1	<input type="checkbox"/> Manual Entry
Type:	AT	APPDCAR Test Society	Rule Number:	1	Activity Date: 18-MAY-2006
<input type="checkbox"/> Inactive	Inactive Date:				
<div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; padding-bottom: 5px;"> Gift Society Cross Reference Members Preferred Classes Donor Categories Gift Types Campaign Types Campaigns Designations </div>					
Membership Duration:	1	Minimum Amount:	5,000.00		
Number of Giving Years:	1	Maximum Amount:	250,000.00		
Start Year of Giving:		Minimum Single Amount:			
Pledges		Multiple Credit Amount		Memo Credit Amount	
<input checked="" type="radio"/> Pledges		<input checked="" type="radio"/> Pledge		<input type="radio"/> Pledge	
<input type="radio"/> Installments		<input type="radio"/> Multiple		<input checked="" type="radio"/> Memo	
<input type="radio"/> Exclude		<input type="radio"/> Exclude		<input type="radio"/> Exclude	
Gifts		Multiple Credit Amount		Memo Credit Amount	
<input type="radio"/> Gifts		<input type="radio"/> Payment		<input type="radio"/> Payment	
<input checked="" type="radio"/> Pledge Payments		<input type="radio"/> Multiple		<input type="radio"/> Memo	
<input type="radio"/> Both		<input checked="" type="radio"/> Exclude		<input checked="" type="radio"/> Exclude	
<input type="radio"/> Exclude					
Include			Matching Gifts		
<input type="checkbox"/> Spouse <input type="checkbox"/> Other Cross Reference			Paid: <input type="checkbox"/> Donor <input type="checkbox"/> Spouse <input type="checkbox"/> Other Cross Reference		
<input type="checkbox"/> Pledge Payments on Qualifying Pledges in the same recognition			Anticipated: <input type="checkbox"/> Donor <input type="checkbox"/> Spouse <input type="checkbox"/> Other Cross Reference		
<input type="checkbox"/> Expected Matching Gifts					



Section B: Set Up

Lesson: Gift Society Rule Form (APADCRL) (Continued)

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Procedure

Follow these steps to complete the form.

Step	Action
1	Access the Gift Society Rules Form (APADCRL).
2	Enter the society code in the Society field.
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 Start 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	Click the appropriate radio button in the Pledges field to indicate how pledge payments should be handled (e.g., pledges, installments, exclude).
14	Click the appropriate radio button in the Multiple Credit Amount depending on if the amount (minus any amounts multiplied to other IDs) should be included in the sum qualifying the member for the society.
15	Click the appropriate radio button in the Memo Credit Amount depending on if the amount should be included in the sum qualifying each memo ID for the society.



Section B: Set Up

Lesson: Gift Society Rule Form (APADCRL) (Continued)

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Procedure, continued

Step	Action
16	Click the appropriate radio button in the Gifts field to indicate how gift payments should be handled.

Value	Description
Gifts	One-time gifts, not pledge payments, should be included.
Pledge Payments	Pledge payments, not one-time gifts, should be included.
Both	Both one-time gifts and pledge payments should be included.
Exclude	Neither one-time gifts nor pledge payments should be included.

18	Click the appropriate radio buttons in the Multiple Credit Amount and Memo Credit Amount fields.
19	Click the appropriate radio buttons in the Include field.

IF	THEN
the spouse's pledge and/or gift amount should be included in the sum qualifying the member for the society	click the Spouse checkbox.
amounts for cross references other than spouses are included in the sum qualifying the member for the society	click the Other Cross Reference checkbox.
you want the rule to count both pledges and pledge payments for qualifying pledges	click the Pledge Payments on Qualifying Pledges in the same recognition checkbox. <u>Note:</u> If you want to set up a rule so it counts only pledges, do not select this checkbox.
you want to include expected matching gift amounts	click the Expected Matching Gifts checkbox.



Section B: Set Up

Lesson: Gift Society Rule Form (APADCRL) (Continued)

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Procedure, continued

Step	Action
20	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.
21	Click the Save icon.



Section B: Set Up

Lesson: Gift Society Default Premiums Rules (APADCDP)

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Purpose

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 these types of questions: What benefits will Joe Donor receive in 2005 if

- his annual gift is \$X
- his gift is restricted to X
- he gives a planned gift
- his lifetime giving is over \$X?

Banner form

Gift Society Default Premiums Rules APADCDP 7.0 (s4b70)

Year	Type	Society	Last	Premium	Activity Date	
2004	RG	Regular Society	ATHL	DINE	President's Dinner	18-MAY-2004
2004	RG	Regular Society	TOWR	MUG	Alumni Association Mug	18-MAY-2004
1996	RG	Regular Society	ATHL	PARK	Parking Sticker Athletic Evnts	18-MAY-2004
1996	RG	Regular Society	BLDR	WGHT	Paperweight with Seal	18-MAY-2004
1996	RG	Regular Society	CENT	MUG	Alumni Association Mug	18-MAY-2004
1996	RG	Regular Society	FNDR	DESK	Desk Set	18-MAY-2004
1996	RG	Regular Society	PRES	LITH	College Lithograph	18-MAY-2004
1996	RG	Regular Society	TOWR	DINE	President's Dinner	18-MAY-2004
1995	RG	Regular Society	ATHL	PARK	Parking Sticker Athletic Evnts	22-MAY-1995
1995	RG	Regular Society	BLDR	WGHT	Paperweight with Seal	22-MAY-1995
1995	RG	Regular Society	CENT	MUG	Alumni Association Mug	22-MAY-1995
1995	RG	Regular Society	FNDR	DESK	Desk Set	22-MAY-1995
1995	RG	Regular Society	PRES	LITH	College Lithograph	22-MAY-1995
1995	RG	Regular Society	TOWR	DINE	President's Dinner	22-MAY-1995



Section B: Set Up

Lesson: Gift Society Default Premiums Rules (APADC DP) (Continued)

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Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Gift Society Default Premiums Rules Form (APADC DP).
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.



Section B: Set Up

Lesson: Self Check

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Directions

Use the information you have learned in this workbook to complete this self check activity. Match the form to its description by filling in the blank with the correct letter.

Question 1

- | | | |
|---------------------------------------------|-------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| 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. |



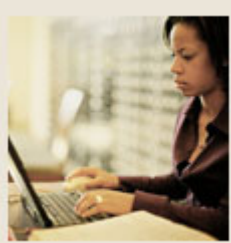
Section B: Set Up

Lesson: Answer Key

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Question 1

- | | | |
|---------------------------------------------|----------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| 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

Lesson: Overview

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Introduction

This course is intended to teach the participant to identify key forms, tables, and reports in the 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 Education Practices computer-based training (CBT) tutorial *Banner 7 Fundamentals*, or have equivalent experience navigating in the Banner system.

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Running the Gift Society Year to Date Report (AGPDCGL)	33
Running the Gift Society Report (APPDCLB)	35
Running the Gift Society Rules List Report (APPDCLS)	38
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Viewing the Report Results.....	43
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Section C: Day-to-Day Operations

Lesson: Process Introduction

◀ Jump to TOC

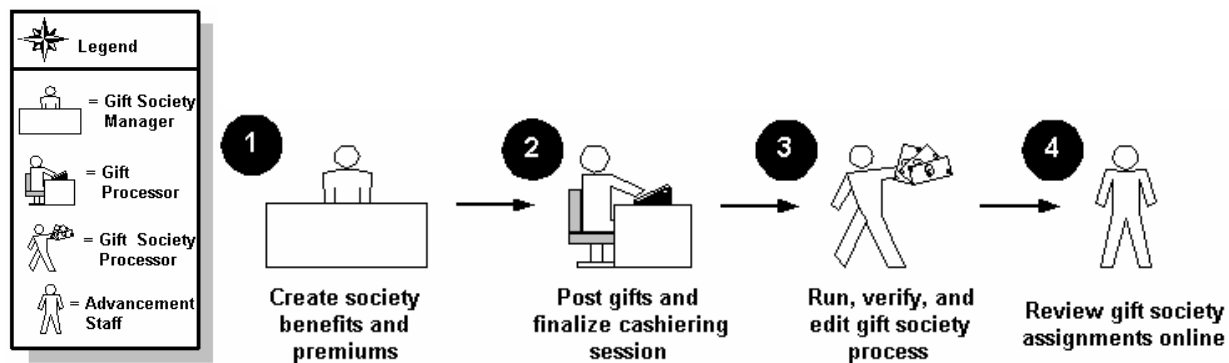
About the process

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

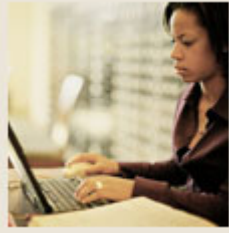
This diagram highlights the Gift Society process within the overall Advancement workflow.



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.



Section C: Day-to-Day Operations

Lesson: Assigning Donors to Gift Societies

◀ Jump to TOC

Purpose

The Gift Society Membership Form (APADCLB) contains summary and detail information for present and past gift society memberships.

Banner form

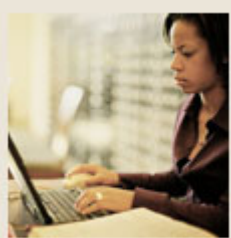
Gift Society Membership APADCLB 7.2.1 (s4b70)

ID:	Name	Category	Class
510000001	Matthew Allen	ALUM	1972
510000002	Mrs Roberta Evans Allen, DDS	ALUM	1972

Gift Society Memberships | Gift Society Detail | Benefits and Premiums | Comments

Highest Priority Society	Description	Type	Priority	Years	Total Years
PRES	Presidents Club	RG	1	1	5

Year:	2006	Society:	APP1	APPDCAR Test 1	Society Type:	AT
Assignment:	CC	Computer Calculated	Type Priority:	5	Society Priority:	1
Society Name:	Matty Allen	Activity Date:	11-APR-2006			
User:	SGEISER					
Year:	2005	Society:	APP1	APPDCAR Test 1	Society Type:	AT
Assignment:	CC	Computer Calculated	Type Priority:	5	Society Priority:	1
Society Name:		Activity Date:	06-DEC-2005			
User:	SGEISER					
Year:	2005	Society:	BLDR	Builders Club	Society Type:	RG
Assignment:	PR	Presidential Request	Type Priority:	1	Society Priority:	4
Society Name:		Activity Date:	01-JUN-2005			
User:	SGEISER					



Section C: Day-to-Day Operations

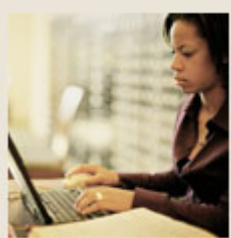
Lesson: Assigning Donors to Gift Societies (Continued)

◀ Jump to TOC

Procedure

Follow these steps to review the gift society membership information.

Step	Action
1	Access the Gift Society Membership Form (APADCLB).
2	Select an ID from the drop-down menu in the ID field.
3	Perform a Next Block function.
4	<p>Review the information displayed including:</p> <p>Highest Priority Society – The society displayed is determined by society type priority and society priority</p> <p>Type – Society type.</p> <p>Priority – Society priority.</p> <p>Years – Total number of years the ID has belonged to the Highest Priority Society.</p> <p>Total Years – Total number of years the ID has belonged to any gift society.</p> <p>The next window on the tab displays:</p> <p>Year – The society membership year. Required.</p> <p>Society – Gift society the ID's membership is required in. Required.</p> <p>Assignment – Method by which the donor was entered into the gift society. Required.</p> <p>The remaining fields are display only.</p>



Section C: Day-to-Day Operations

Lesson: Assigning Donors to Gift Societies (Continued)

◀ Jump to TOC

Procedure, continued

Follow these steps to count both pledges and pledge payments for qualifying pledges.

Step	Action
1	Click the <u>Gift Society Detail</u> tab.
2	Review the information displayed including: Society – Gift society the ID’s membership is in. Pledges – Pledge or installment amount counted toward the qualifying membership amount. If not counted, Exclude. Multiple Credit Amount and Memo Credit Amount – Indicates amount counted toward the qualifying membership amount. Gifts – Same as above except associated with gifts.
3	In the Include block, click the Pledge Payments on Qualifying Pledges in the same recognition checkbox if you want to count pledges and pledge payments for qualifying pledges when Banner assigns donors to gift societies. <u>Note:</u> If not selected, the Gift Society Assignment Process (APPDCAR) will exclude pledge payments for qualifying pledges when determining gift societies.

Follow these steps to enter the benefits or premiums associated with the gift society membership.

Step	Action
1	Click the <u>Benefits and Premiums</u> Tab.
2	Enter the Benefits/Premium Code associated with the gift society membership.
3	Click the Save icon.

Follow these steps to enter comments about the gift society membership.

Step	Action
1	Click the <u>Gift Society Comments</u> tab.
2	Enter any comments about the gift society membership.
3	Click the Save icon.



Section C: Day-to-Day Operations

Lesson: Running the Gift Society Assignment Report (APPDCAR)

◀ Jump to TOC

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.

Note: One-time gifts have been separated from pledge payments on the Gift Society Rules Form (APADCRL) and the Gift Society Membership Form (APADCLB), and this process was changed to process these changes when it assigns donors to gift societies. When APPDCAR is run and the **Pledge Payments on Qualifying Pledges in the same recognition** checkbox is selected on APADCRL, APPDCAR will include both pledges and pledge payments for qualifying pledges when it assigns donors to gift societies. If the checkbox is not selected, it will exclude pledge payments for qualifying pledges when determining gift societies.

The report displays new messages:

- If a donor has a spouse, and the Gift Society Rules Form (APADCRL) was setup to include giving from spouses in the calculations for assigning gift society memberships, you will receive a message if you run APPDCAR for the same donor and spouse. The message, *already assigned - cross membership to be created*, indicates that the primary gift society holder has already been assigned and the cross-referenced person will be assigned to the same gift society.
- When a donor who is part of a lower-level gift society made another gift that entitled that donor to be in a higher-level gift society, and the **Allow Delete** check box was not selected for the lower-level gift society on the Gift Society Validation Form (ATVDCNP), APPDCAR would indicate that the change had been made even though it hadn't. On the Gift Society Membership Form (APADCLB), the gift society listed was the lower-level society.

Because the **Allow Delete** check box was not selected, you will have to assign the new gift society manually. This functionality has not changed. However, a new message will appear on the APPDCAR report in this situation. The message, *eligible - manual update required*, identifies the donors so you can make the manual changes.



Section C: Day-to-Day Operations

Lesson: Running the Gift Society Assignment Report (APPDCAR) (Continued)

◀ Jump to TOC

Banner form

Process Submission Controls GJAPCTL 7.2 (s7s7010g) (CHICAG)

Process: Parameter Set:

Printer Control

Printer: Special Print: Lines: Submit Time:

Parameter Values

Number	Parameters	Values
01	Gift Society Year(Format YYYY)	<input type="text"/>
02	Gift Society Type (2 Char)	<input type="text"/>
03	Report[R] or Report/Update(U)	<input type="text" value="R"/>
04	Last Run Date (DD-MON-YYYY)	<input type="text"/>
05	Pledge Status to Exclude	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

LENGTH: 4 TYPE: Number O/R: Required M/S: Single
The gift society year for which membership is being calculated.

Submission

Save Parameter Set as Name: Description: Hold Submit



Section C: Day-to-Day Operations

Lesson: Running the Gift Society Assignment Report (APPDCAR) (Continued)

◀ Jump to TOC

Procedure

Follow the steps to complete the procedure.

Step	Action						
1	Access the Gift Society Assignment Report (APPDCAR) via the Process Submission Controls Form (GJAPCTL).						
	<table border="1"> <thead> <tr> <th>IF</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>you want the output to appear on the screen</td> <td>enter <i>Database</i> in the Printer field.</td> </tr> <tr> <td>you want the output printed out</td> <td>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.						
2	Perform a Next Block function, until you access the Parameter Values block.						
3	Add the values for the Gift Society Year , the Gift Society Type, Report(R) or Report/Update (U) , Last Run Date , and Pledge Status to Exclude (parameters 01, 02, 03, 04, and 05). <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. <u>Note:</u> The Pledge Status to Exclude parameter allows you to specify the statuses of the pledges you want to exclude from the assignment process. To be valid, a pledge must already exist on the Pledge Status Code Validation Form (ATVPSTA).						
4	Perform a Next Block function to access the Submission block.						
5	Select the Submit radio button.						
6	Click the Save icon.						
7	When you are satisfied with the results, run the report in Update mode.						



Section C: Day-to-Day Operations

Lesson: Running the Gift Society Year to Date Report (AGPDCGL)

◀ Jump to TOC

Purpose

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.

Banner form

The screenshot shows a web-based form titled "Process Submission Controls GJAPCTL 7.0 (s4b7D)". The form is divided into several sections:

- Process:** A dropdown menu set to "AGPDCGL" and a text field containing "Gift Society Year to Date Rpt".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section with a "Printer:" dropdown set to "DATABASE", a "Special Print:" text field, "Lines:" set to "55", and a "Submit Time:" text field.
- Parameter Values:** A table with two columns: "Number" and "Parameters". The "Parameters" column has a dropdown menu. Below the table, there are "Values" input fields. The table contains 8 rows of parameters:

Number	Parameters	Values
01	Society Type	
02	Society Year (YYYY)	
03	Constituency Group 1: VSE 1	
04	Constituency Group 1: VSE 2	
05	Constituency Group 2: VSE 1	
06	Constituency Group 2: VSE 2	
07	Constituency Group 3: VSE 1	
08	Constituency Group 3: VSE 2	
- Submission:** A section with a "Save Parameter Set as" checkbox, "Name:" and "Description:" text fields, and radio buttons for "Hold" and "Submit".

Below the parameter values table, there is a note: "LENGTH: 2 TYPE: Character O/R: Required M/S: Single Society type code for which societies are to be reported."



Section C: Day-to-Day Operations

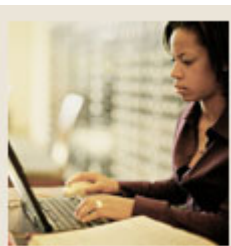
Lesson: Running the Gift Society Year to Date Report (AGPDCGL) (Continued)

◀ Jump to TOC

Procedure

Follow these steps to complete the process.

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



Section C: Day-to-Day Operations

Lesson: Running the Gift Society Report (APPDCLB)

◀ Jump to TOC

Purpose

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:

- Constituents and Organizations: Society name from the Society Membership Form (APADCLB)
- Constituents: Gift Society Name from the constituent/Organization Name Form (APANAME)
- Organizations: Gift Society Name from the Constituent/Organization Name Form (APANAME)
- Constituents only: Preferred Address Name from APANAME, using the concatenate parameter indicator.
- 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.



Section C: Day-to-Day Operations

Lesson: Running the Gift Society Report (APPDCLB) (Continued)

◀ Jump to TOC

Banner form

The screenshot shows a web browser window titled "Process Submission Controls GJAPCTL 7.0 (s4b70)". The form includes the following sections:

- Process:** APPDCLB (dropdown), Gift Society Report (text field)
- Parameter Set:** (dropdown)
- Printer Control:**
 - Printer:** DATABASE (dropdown)
 - Special Print:** (text field)
 - Lines:** 55 (text field)
 - Submit Time:** (text field)
- Parameter Values:**

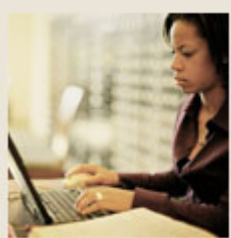
Number	Parameters	Values
01	Opt:A-Members,B-Class,C-Donor	A
02	Gift Society Code (4 Char)	
03	Society Years (May use %)	
04	Donor Codes (4 Char)	
05	Class Years (May use %)	
06	Society Type (2 Char)	
07	Concatenate Prefix/Suffix(Y/N)	

LENGTH: 1 TYPE: Character O/R: Required M/S: Single
Sort report by membership priority [A], class year [B], or donor code [C].
- Submission:**
 - Save Parameter Set as
 - Name: (text field)
 - Description: (text field)
 - Hold
 - Submit

Procedure

Follow the steps to complete the procedure.

Step	Action						
1	Access the Gift Society Report (APPDCLB) via the Process Submission Controls Form (GJAPCTL).						
	<table border="1"> <thead> <tr> <th>IF</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>you want the output to appear on the screen</td> <td>enter <i>Database</i> in the Printer field.</td> </tr> <tr> <td>you want the output printed out</td> <td>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.						
2	Perform a Next Block function, until you access the Parameter Values block.						



Section C: Day-to-Day Operations

Lesson: Running the Gift Society Report (APPDCLB) (Continued)

◀ Jump to TOC

Procedure, continued

Step	Action																								
3	Add the values as follows:																								
	<table border="1"> <thead> <tr> <th>Parameter</th> <th>Value</th> <th>Required</th> </tr> </thead> <tbody> <tr> <td>Option</td> <td>A – Sorts Membership by priority B – Sorts by class Year C – Sorts by Donor code</td> <td>Yes</td> </tr> <tr> <td>Gift Society Code</td> <td>Gift Society Validation Form (ATVDCNP)</td> <td>No</td> </tr> <tr> <td>Society Years</td> <td>Gift Society Year Validation Form (ATVDCYR)</td> <td>No</td> </tr> <tr> <td>Donor Codes</td> <td>Donor Category Validation Form (ATVDONR)</td> <td>No</td> </tr> <tr> <td>Class Years</td> <td>Preferred classes</td> <td>No</td> </tr> <tr> <td>Society Type</td> <td>Gift Society Type Validation Form (ATVDCST)</td> <td>No</td> </tr> <tr> <td>Concatenate Prefix / Suffix to Preferred Address Name</td> <td> <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> </td> <td>No</td> </tr> </tbody> </table>	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
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																							
4	Perform a Next Block function to access the Submission block.																								
5	Click the Submit radio button.																								
6	Click the Save icon.																								



Section C: Day-to-Day Operations

Lesson: Running the Gift Society Rules List Report (APPDCLS)

◀ Jump to TOC

Purpose

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

This report now processes the new rule option for counting pledges, pledge payments for qualifying pledges, and to process the rule option about including expected matching gifts.

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.

Banner form

Process: APPDCLS Gift Society Rules List Report Parameter Set: []

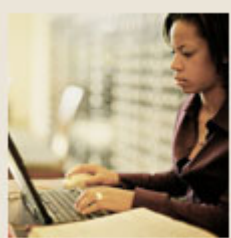
Printer Control
 Printer: DATABASE Special Print: [] Lines: 55 Submit Time: []

Parameter Values

Number	Parameters	Values
01	Society Type (2 Chars)	[]
02	Gift Society Code (4 Chars)	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]

LENGTH: 2 TYPE: Character O/R: Optional M/S: Multiple
 Society type(s) to list rules.

Submission
 Save Parameter Set as Name: [] Description: [] Hold Submit



Section C: Day-to-Day Operations

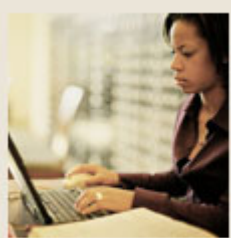
Lesson: Running the Gift Society Rules List Report (APPDCLS) (Continued)

◀ Jump to TOC

Procedure

Follow these steps to complete the procedure.

Step	Action						
1	Access the Gift Society Rules List Report (APPDCLS) via the Process Submission Controls Form (GJAPCTL).						
2	Perform a Next Block function.						
	<table border="1"><thead><tr><th>IF</th><th>THEN</th></tr></thead><tbody><tr><td>you want the output to appear on the screen</td><td>enter <i>Database</i> in the Printer field.</td></tr><tr><td>you want the output printed out</td><td>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 to access the Parameter Values box.						
4	Click in the Values field.						
5	Click the Search icon to assign values to the parameter (if necessary).						
6	Perform a Next Block to access the Submission block.						
7	Click the Submit radio button.						
8	Click the Save icon.						



Section C: Day-to-Day Operations

Lesson: Running the Data Definition File List Report (APPDFLS)

◀ Jump to TOC

Purpose

The Data Definition File List Report (APPDFLS) allows you to check the data you are about to load into Banner. You can verify that the file definition you set up on the Data Field Position Rules Form (AGATPFD) is correct, and you can check the values for each field in the file. It is valid for both fixed length and character delimited files, and it can be run on part or all of your incoming data file.

IF	THEN
the file is fixed length	the report will also show the start position, the end position, and the occurrence.
It is character delimited	it will show the field number and the occurrence.

Note: You can verify file definitions and input data when you reach the point in the data load process when you have performed all the setup steps and you are about to run the Matching Gift Company Data Load Process (AGPMATC) or the External Ratings/Directory Load Process (APPCUPD).



Section C: Day-to-Day Operations

Lesson: Running the Data Definition File List Report (APPDFLS) (Continued)

◀ Jump to TOC

Banner form

Process Submission Controls GJAPCTL 7.2 (s7s7010g) (CHICAG)

Process: APPDFLS Data Definition File List Parameter Set:

Printer Control

Printer: Special Print: Lines: Submit Time:

Parameter Values

Number	Parameters	Values
01	File Code	
02	Path of Data File	
03	Data File Name	
04	Data Source Identifier	
05	Start Record Number	1
06	End Record Number	
07	Header Record Exists	N

LENGTH: 10 TYPE: Character O/R: Required M/S: Single
Data File Definition Name

Submission

Save Parameter Set as Name: Description: Hold Submit



Section C: Day-to-Day Operations

Lesson: Running the Data Definition File List Report (APPDFLS) (Continued)

◀ Jump to TOC

Procedure

Follow these steps to complete the process

Step	Action																																
1	Access the Data Definition File List Report (APPDFLS) via the Process Submission Controls Form (GJAPCTL).																																
	<table border="1"> <thead> <tr> <th>IF</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>you want the output to appear on the screen</td> <td>enter <i>Database</i> in the Printer field.</td> </tr> <tr> <td>you want the output printed out</td> <td>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.																										
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2	Perform a Next Block function, until you access the Parameter Values block.																																
3	Add the values as follows:																																
	<table border="1"> <thead> <tr> <th>Parameter Number</th> <th>Parameter</th> <th>Value</th> <th>Required</th> </tr> </thead> <tbody> <tr> <td>01</td> <td>File Code</td> <td>Data File Validation Form (ATVTAPE)</td> <td>Yes</td> </tr> <tr> <td>02</td> <td>Path of Data File</td> <td></td> <td>Yes</td> </tr> <tr> <td>03</td> <td>Data File Name</td> <td></td> <td>Yes</td> </tr> <tr> <td>04</td> <td>Data Source Identifier</td> <td>Data Source Identifier Validation Form (ATCDSRC)</td> <td>Yes</td> </tr> <tr> <td>05</td> <td>Start Record Number</td> <td></td> <td>Optional</td> </tr> <tr> <td>06</td> <td>End Record Number</td> <td></td> <td>Optional</td> </tr> <tr> <td>07</td> <td>Header Record Exists</td> <td>Y or N</td> <td>Optional</td> </tr> </tbody> </table>	Parameter Number	Parameter	Value	Required	01	File Code	Data File Validation Form (ATVTAPE)	Yes	02	Path of Data File		Yes	03	Data File Name		Yes	04	Data Source Identifier	Data Source Identifier Validation Form (ATCDSRC)	Yes	05	Start Record Number		Optional	06	End Record Number		Optional	07	Header Record Exists	Y or N	Optional
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01	File Code	Data File Validation Form (ATVTAPE)	Yes																														
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05	Start Record Number		Optional																														
06	End Record Number		Optional																														
07	Header Record Exists	Y or N	Optional																														
4	Perform a Next Block function to access the Submission block.																																
5	Click the Submit radio button.																																
6	Click the Save icon.																																



Section C: Day-to-Day Operations

Lesson: Viewing the Report Results

◀ Jump to TOC

Purpose

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.

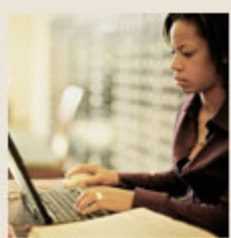
Manual gift society changes can be made on this form. If deletions are allowed for a gift society (as set by ATVDCNP), you may also delete societies for a donor here. Donors that are manually entered will not be deleted, but if a donor later qualifies for a higher society, then it will list them appropriately.

Example: If someone has donated time but not money, you can manually add them to a gift society to be recognized.

Banner form

Highest Priority Society	Description	Type	Priority	Years	Total Years
PRES	Presidents Club	RG	1	1	2

Year:	2004	Society:	APP1	APPDCAR Test 1	Society Type:	AT
Assignment:	CC	Computer Calculated			Type Priority:	5
Society Name:					Society Priority:	1
User:	CNORRIS				Activity Date:	19-JAN-2005
Year:	2004	Society:	PRES	Presidents Club	Society Type:	RG
Assignment:	CC	Computer Calculated			Type Priority:	1
Society Name:					Society Priority:	2
User:	CNORRIS				Activity Date:	14-MAY-2004
Year:	1995	Society:	ATHL	Athletic Boosters	Society Type:	RG
Assignment:	PR	Presidential Request			Type Priority:	1
Society Name:					Society Priority:	6
User:	SGEISER				Activity Date:	14-MAY-2004



Section C: Day-to-Day Operations

Lesson: Viewing the Report Results (Continued)

◀ Jump to TOC

Procedure

Follow these steps to complete the procedure.

Step	Action
1	Access the Gift Society Membership Form (APADCLB).
2	Perform a Next Block function to view the latest gift society assignment.
3	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. <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.
4	Click the Save icon.

Viewing a spouse record

If the rules are set to give membership to a spouse, the process will also update that record. Results can be viewed on Gift Society Membership Form (APADCLB).



Section C: Day-to-Day Operations

Lesson: Viewing the Report Results (Continued)

◀ Jump to TOC

Gift Society Detail window

This form breaks out one-time gifts from pledge payments. The rules that were used to assign the gift society membership for that donor are displayed on this form. An Expecting Matching Gifts indicator is also included.

The screenshot shows two overlapping windows from a software application. The top window, titled "Gift Society Membership APADCLB 7.2 (s7s7010g) (CHICAG)", displays donor information: ID 510000001, Name Mrs. Matthew A. Allen, PHD., Category ALUM, and Class 2001. Spouse information includes ID 510000002 and Name Roberta Evans Allen. The bottom window, titled "Gift Society Detail APADCLB 7.2 (s7s7010g) (CHICAG)", shows configuration options for a society named "APP1 APPDCAR Test 1". It includes sections for "Pledges" and "Gifts", each with radio button options for "Pledge", "Installments", "Both", "Exclude", "Payment", "Multiple", and "Exclude". There are also sections for "Multiple Credit Amount" and "Memo Credit Amount" with similar options. At the bottom, there are checkboxes for "Include" (Spouse, Other Cross Reference, Expected Matching Gifts) and "Matching Gifts" (Paid and Anticipated for Donor, Spouse, and Other Cross Reference).

Gift Society List Form (APACLUB)

The Gift Society List Form (APACLUB) displays summary gift society membership information.

Memberships are displayed by year and by priority order within the year. The information may be queried by year, by society, or by assignment method.



Section C: Day-to-Day Operations

Lesson: Self Check

◀ Jump to TOC

Directions

Use the information you have learned in this workbook to complete this self check activity. Match the form to its description by filling in the blank with the correct letter.

Question 1

- | | | |
|-------------------------------------|-------|-----------------------------------------------------------------------------------------------------------------|
| 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. |



Section C: Day-to-Day Operations

Lesson: Answer Key

◀ [Jump to TOC](#)

Question 1

- | | | |
|-------------------------------------|----------|-----------------------------------------------------------------------------------------------------------------|
| 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. |
| c. 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

Lesson: Overview

◀ [Jump to TOC](#)

Introduction

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

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Day-to-Day Forms and Setup Needed.....	51
Forms Job Aid	52



Section D: Reference

Lesson: Setup Forms and Where Used

◀ Jump to TOC

Guide

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		



Section D: Reference

Lesson: Day-to-Day Forms and Setup Needed

◀ Jump to TOC

Guide

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)
Data Definition File List Report (APPDFLS)	<ul style="list-style-type: none"> •



Section D: Reference

Lesson: Forms Job Aid

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Guide

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	
APPDFLS	Data Definition File List Report	



Release Date

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This workbook was last updated on 5/30/2006.