TRAINING WORKBOOK

SCT Banner
Technical Training

Advancement Technical
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Section A: Introduction

Overview

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# Introduction

This course introduces SCT Banner Advancement to the technical audience. It examines conversion, migration, system details, process flows, and schematics, as well as directory structure, views, interfaces, reports, processes, procedures, and scripts.

## Objectives

Upon completion of this course, attendees will be able to:

- Identify SCT Banner Advancement forms and tables
- Query the SCT Banner Advancement tables
- Identify tables and fields for data conversion
- Identify tables and fields for migration to the production database
- Follow key Advancement processes

## Target audience

Technical personnel and key Advancement users involved with the conversion, implementation, and daily support of SCT Banner Advancement

## Prerequisites

Introduction to SCT Banner General Technical and Security
# Workbook contents

This workbook contains the following sections:

- Section A: Introduction
- Section B: Introduction to Advancement Technical
- Section C: Naming Conventions
- Section D: Data Dictionaries
- Section E: PIDMs and IDs
- Section F: Biographic and Demographic Tables
- Section G: Constituent and Organization Processing
- Section H: Additional Processing
- Section I: Conversions
- Section J: Conversion Process
- Section K: Migration to Advancement
- Section L: Views, Temporary Tables and Interfaces
- Section M: About SCT
Section B: Introduction to Advancement Technical

Overview

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<tr>
<td>Other modules</td>
<td>B-6</td>
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SCT Banner System Overview

Questions

- Where does SCT Banner Advancement fit into the entire SCT Banner system?
- What are the major components of SCT Banner Advancement?

The SCT Banner System

- Student
- Accounts Receivable
- Financial Aid
- Human Resources
- Finance
- Advancement

SCT BANNER APPLICATION SYSTEMS

SCT BANNER GENERAL SYSTEM MODULES

- Job Submission
- Population Selection
- Graphing
- Letter Generation
- System Functions/Administration
- Event Management
- General Web Management

ORACLE
### SCT Banner General System Modules

<table>
<thead>
<tr>
<th>Module</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Submission</strong></td>
<td>This module facilitates the submission of reports and processes throughout SCT Banner. You can define new reports and processes to Job Submission, define default parameters, and run SCT Banner reports and processes. You can also set up Job Submission for reports and processes developed on site.</td>
</tr>
<tr>
<td><strong>Population Selection</strong></td>
<td>This module lets you identify and group entities in the database, such as people, vendors, or organizations. You can define selection criteria to identify and extract a subset of these entities to use in SCT Banner reports, processes, and letters.</td>
</tr>
<tr>
<td><strong>Letter Generation</strong></td>
<td>This module lets you define extract variables, build paragraphs, build a letter, extract variable data form the database, and merge the extracted variable data into the letter. You can also create a download file that can be used to produce letters with Microsoft Word or WordPerfect.</td>
</tr>
<tr>
<td><strong>Graphing</strong></td>
<td>This module provides a step-by-step wizard that lets you graph data from your SCT Banner database. SCT Banner and Oracle Graphics work together seamlessly to perform the tasks necessary to produce various types of graphs. You can easily save a graph and re-run it at a later time.</td>
</tr>
<tr>
<td><strong>System Functions/Administration</strong></td>
<td>This module lets you set up, operate, and monitor SCT Banner. You can set up currency codes, maintain EDI information, set up the Desktop Tools application, create electronic documents, set up Event Queue Maintenance, customize menus, create SCT Banner objects, set up QuickFlows, and set up Value Based Security (VBS).</td>
</tr>
<tr>
<td><strong>Event Management</strong></td>
<td>This module helps you manage an event and the functions, tasks, and participants associated with the event. You can schedule functions, organize administrative tasks, track attendance, and send messages. Keeping track of this information not only helps you manage the current event, but provides information that can be used to plan future events.</td>
</tr>
<tr>
<td><strong>General Web Management</strong></td>
<td>This module supports the integrated processing between SCT Banner and your Web applications (Web for Student, Web for Faculty and Advisors, Web for Employees, Web for Advancement, and Web for Executives).</td>
</tr>
</tbody>
</table>
Introduction to SCT Banner Advancement System

**Banner Advancement**

The SCT Banner Advancement System supports the diverse activities critical to a successful institutional advancement program.

SCT Banner Advancement handles day-to-day activities of alumni and development offices and provides the necessary information for program planning and evaluation.

**Diagram**

![Diagram of SCT Banner Advancement System]
## SCT Banner Advancement System

### Components
- Constituent Processing
- Organization Processing
- Membership Processing
- Prospect Management Processing
- Designation Processing
- Solicitor Organization Processing
- Campaign Processing
- Pledge Processing
- Gift & Pledge Payment Processing

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constituent Processing</td>
<td>Establishes and maintains demographic, biographic and giving data for</td>
</tr>
<tr>
<td></td>
<td>Advancement population.</td>
</tr>
<tr>
<td>Organization Processing</td>
<td>Stores matching gift information, organization contact persons, organization-</td>
</tr>
<tr>
<td></td>
<td>specific facts for organizations such as foundations and corporations.</td>
</tr>
<tr>
<td>Membership Processing</td>
<td>Maintains information essential for institution membership programs.</td>
</tr>
<tr>
<td></td>
<td>Includes dues entry, renewal and reminder letters, and membership history</td>
</tr>
<tr>
<td></td>
<td>tracking.</td>
</tr>
<tr>
<td>Prospect Management Processing</td>
<td>Provides support of prospect identification, strategy plans, pool</td>
</tr>
<tr>
<td></td>
<td>segmentation, research and tracking.</td>
</tr>
<tr>
<td>Designation Processing</td>
<td>Controls the accounting of gifts and pledges designated for specific</td>
</tr>
<tr>
<td></td>
<td>funds, departments and permits interface with SCT Banner Finance.</td>
</tr>
<tr>
<td>Solicitor Organization</td>
<td>Tracks the staff and organizations involved in the fundraising effort.</td>
</tr>
<tr>
<td>Processing</td>
<td>Establishes solicitor organizations, assigns solicitors and monitors the</td>
</tr>
<tr>
<td></td>
<td>effectiveness of the organization.</td>
</tr>
<tr>
<td>Campaign Processing</td>
<td>Tracks, controls, and summarizes the success of fundraising activities.</td>
</tr>
<tr>
<td>Pledge Processing</td>
<td>Establishes and maintains pledges for all constituents, dividing pledges</td>
</tr>
<tr>
<td></td>
<td>among campaigns, designations and constituents, and creating reminders</td>
</tr>
<tr>
<td></td>
<td>according to payment plans.</td>
</tr>
<tr>
<td>Gift &amp; Pledge Payment Processing</td>
<td>Records and tracks various types of gifts, analyzes solicitation methods,</td>
</tr>
<tr>
<td></td>
<td>records matching gifts, and reviews cashiering activity.</td>
</tr>
</tbody>
</table>
# Other modules

<table>
<thead>
<tr>
<th>Event Management</th>
<th>Manage events, functions, tasks, and participants.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advancement QuickFlow</td>
<td>Access a set of forms in a specified sequence.</td>
</tr>
<tr>
<td>Advancement Self-Service</td>
<td>Provides secure, user-defined, information access through the World Wide Web.</td>
</tr>
</tbody>
</table>
Section C: Naming Conventions

Overview

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<td>Primary Keys</td>
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<td>Foreign Keys</td>
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<td>Check Constraints</td>
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<td>Unique Constraints</td>
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<td>For More Information On…</td>
<td>C-13</td>
</tr>
</tbody>
</table>
## Naming Conventions

### Product Table Owners

<table>
<thead>
<tr>
<th>Product</th>
<th>Table Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>GENERAL</td>
</tr>
<tr>
<td>General Person</td>
<td>SATURN</td>
</tr>
<tr>
<td>Finance</td>
<td>FIMSMGR</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>TAISMGR</td>
</tr>
<tr>
<td>Position Control</td>
<td>POSNCTL</td>
</tr>
<tr>
<td>Payroll</td>
<td>PAYROLL</td>
</tr>
<tr>
<td>Student</td>
<td>SATURN</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>FAISMGR</td>
</tr>
<tr>
<td>Advancement</td>
<td>ALUMNI</td>
</tr>
<tr>
<td>Security</td>
<td>BANSECR</td>
</tr>
</tbody>
</table>

### Forms, Processes, Reports, Tables

All SCT Banner objects (forms, processes (jobs), reports, tables, etc.) adhere to naming conventions.

The names of all SCT Banner forms (except menu forms), reports, processes, and tables are seven characters long and have this structure:

Example: \[ G \ L \ R \ V \ R \ B \ L \]

Position Locations: \[ 1 \ 2 \ 3 \ 4 \ 5 \ 6 \ 7 \]

### Position Location 1

Identifies the primary system owning the form, report, process, or table.

- **A** - Advancement
- **F** - Finance
- **G** - General
- **N** - Position Control
- **P** - Human Resources/Payroll/Personnel
- **R** - Financial Aid
- **S** - Student/Common
- **T** - Accounts Receivable
- **V** - Voice Response
- **H** - New Products (Web)
- **W Y Z** - Reserved for client-developed new applications built to co-exist with SCT Banner applications

*Continued on the next page*
## Naming Conventions, Continued

### Advancement Position 2
Identifies the module owning the form, process, or table.

If Position 1 is **A**, the character in Position 2 is:
- **A** - Membership
- **D** - Designation
- **E** - Event Management
- **F** - Campaign
- **G** - Pledge and Gift/Pledge Payment
- **L** - Label
- **M** - Prospect Management
- **O** - Organization
- **P** - Constituent/Person
- **S** - Solicitor Organization
- **T** - Validation Form/Table
- **U** - Utility
- **W Y Z** - Reserved for client-developed forms or modules used within a SCT Banner application (character in position 1 not = W, Y, Z)

### Advancement Position 3
Identifies the type of form, report, process, or table.

- **A** - Application form
- **B** - Base Table, Batch COBOL Process
- **C** - Called/list form
- **I** - Inquiry form
- **P** - Process/report
- **R** - Rule table, Repeating table, Report or Process
- **T** - General Maintenance Test Pattern (temporary table)
- **V** - Validation table or View

### Complete list
For a complete list of SCT Banner naming conventions, refer to the SCT General Technical Reference Manual, chapter 1.
## Naming Convention Examples

<table>
<thead>
<tr>
<th>Naming Convention</th>
<th>Components</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>APAIDEN</td>
<td>A</td>
<td>Advancement</td>
</tr>
<tr>
<td></td>
<td>P</td>
<td>Constituent/Person</td>
</tr>
<tr>
<td></td>
<td>A</td>
<td>Application form</td>
</tr>
<tr>
<td></td>
<td>IDEN</td>
<td>Identification</td>
</tr>
<tr>
<td>ADPFEED</td>
<td>A</td>
<td>Advancement</td>
</tr>
<tr>
<td></td>
<td>D</td>
<td>Designation</td>
</tr>
<tr>
<td></td>
<td>P</td>
<td>Process</td>
</tr>
<tr>
<td></td>
<td>FEED</td>
<td>Feed to Finance</td>
</tr>
<tr>
<td>ATVPSTA</td>
<td>A</td>
<td>Advancement</td>
</tr>
<tr>
<td></td>
<td>T</td>
<td>Validation form/table</td>
</tr>
<tr>
<td></td>
<td>V</td>
<td>Validation form/table</td>
</tr>
<tr>
<td></td>
<td>PSTA</td>
<td>Pledge status code</td>
</tr>
<tr>
<td>SPRIDEN</td>
<td>A</td>
<td>Advancement</td>
</tr>
<tr>
<td></td>
<td>T</td>
<td>Validation form/table</td>
</tr>
<tr>
<td></td>
<td>V</td>
<td>Validation form/table</td>
</tr>
<tr>
<td></td>
<td>PSTA</td>
<td>Pledge status code</td>
</tr>
<tr>
<td>GUAIDEN</td>
<td>G</td>
<td>General</td>
</tr>
<tr>
<td></td>
<td>U</td>
<td>Utility</td>
</tr>
<tr>
<td></td>
<td>A</td>
<td>Application form</td>
</tr>
<tr>
<td></td>
<td>IDEN</td>
<td>Identification</td>
</tr>
</tbody>
</table>
Client-Developed Items

W, Y and Z  
SCT has reserved the letters W, Y, and Z for use in positions 1 and 2 of the names of all client-developed applications, forms, reports, tables and modules.

For client-developed applications, use W, Y, or Z in position 1.

For client-developed forms, reports, tables and modules, use the SCT system identifier in position 1 (e.g. A for Advancement) and W, Y, or Z in position 2.
Columns

<table>
<thead>
<tr>
<th>Column names</th>
<th>Application Tables (Base/Repeating) and Validation Tables column names start with the seven-character table name followed by an underscore and the column name.</th>
</tr>
</thead>
</table>
| Example     | • tablename-FIRST_NAME – the First Name column  
• tablename_DONR_CODE – column corresponding to a validation table code (in this example, the donor code in ATVDONR)  
• tablename_ACTIVITY_DATE – most recent activity (change) to table  
• tablename_USER – name (or USER_ID) of the updating user |

```sql
SQL> DESCRIBE APBCONS  (or DESC APBCONS)
SQL> SELECT * FROM APBCONS;
SQL> DESC ATVDONR
SQL> SELECT * FROM ATVDONR;
```
**Validation Tables**

<table>
<thead>
<tr>
<th>Table names</th>
<th>Validation tables and their corresponding forms have the same name. Position 1 is the SCT system identifier; positions 2 and 3 are TV (e.g. ATVDONR, STVATYP).</th>
</tr>
</thead>
</table>
| **Using Dynamic Help** | Access ATVDONR, hold [**Shift**], and double-click on a row’s **Alum** field (Dynamic Help Query). Note the table and column name.  
With a cursor in a field, clicking on Help, Dynamic Help Query will produce the same Help. This is helpful when a user refers to a form field when discussing a technical need.  
Double-clicking on a column with a List of Values (LOV) icon will show the list (e.g. double-click on a **VSE** field in a row). |
Constraints

<table>
<thead>
<tr>
<th>Common constraint types</th>
<th>Five common constraint types used in SCT Banner:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Primary key constraints – enforce unique, non-null keys;</td>
</tr>
<tr>
<td></td>
<td>• Foreign key constraints – referential integrity – ensure children rows are not updated/inserted if parent rows do not exist, and to prevent the deletion of parent rows if children rows exist;</td>
</tr>
<tr>
<td></td>
<td>• Check constraints – enforce integrity issues specified by the check condition;</td>
</tr>
<tr>
<td></td>
<td>• Unique constraints – designate a column or a combination of columns as a unique key.</td>
</tr>
<tr>
<td></td>
<td>• Not Null constraints – are not named.</td>
</tr>
</tbody>
</table>
# Primary Keys

<table>
<thead>
<tr>
<th>Primary keys</th>
<th>A PRIMARY KEY constraint designates a column or combination of columns as the table’s primary key (unique and not null).</th>
</tr>
</thead>
</table>
| Definition   | Primary keys must be defined as follows:  
|              | "PK_" + ppppppp  
|              | where PK denotes Primary Key  
|              | ppppppp = primary key table name |
| Examples     | The primary key for APBCONS is named PK_APBCONS. (The primary key for APBCONS is APBCONS_PIDM.)  
|              | The primary key for APREHIS is named PK_APREHIS. (The primary key for APREHIS is APREHIS_PIDM + APREHIS_SEQ_NO.) |
Foreign Keys

Foreign keys

FOREIGN KEYS can be defined in the following two situations:

- Defining referential integrity constraints referencing the validation tables
- Defining referential integrity constraints for application hierarchy

Defining referential integrity constraints referencing the validation tables

"FK" + n + "_" + fffffff + "_INV_" + ppppppp + "_CODE"

where FK denotes Foreign Key
n = one-up number to distinguish potential duplicates
ffffff = foreign key table name
ppppppp = primary key table name

Examples

The foreign key name for column APRADEG_MAJR_CODE is FK1_APRADEG_INV_STVMAJR_CODE. (APRADEG_MAJR_CODE values must be in the validation table STVMAJR column STVMAJR_CODE.)

Defining referential integrity constraints for application hierarchy

"FK_" + n + "_" + fffffff + "_INV_" + ppppppp + "_KEY"

where FK denotes Foreign Key
n = one-up number to distinguish potential duplicates
ffffff = foreign key table name
ppppppp = primary key table name

Examples

The foreign key name for column APREHIS_PIDM is FK1_APREHIS_INV_APBCONS_KEY. (APREHIS_PIDM values must be in the APBCONS table, meaning a person must have a record in the APBCONS table before they can have a record in APREHIS.)
## Check Constraints

### Standard 1
A check constraint, explicitly defining a condition, may be named following two possible standards:

```
"CC" + n + "_" + ccccccc
  where CC denotes Check Constraint
  n = one-up number to distinguish potential duplicates
  ccccccc = column name
```

**Example**
A check constraint for column SPBPERS_SEX could be CC1_SPBPERS_SEX, checking for value IN (‘F’, ‘M’, ‘N’).

### Standard 2
Another possible check constraint naming standard is:

```
"CC" + x + "_" + ttttttt + "_" + mmmmmm
  where CC denotes Check Constraint,
  x = a checking category
   (e.g. "R" for range, "V" for value)
  tttttttt = table name
  mmmmmm = message
```

**Example**
A check constraint for column SPBPERS_SEX could be CCV_SPBPERS_gender_values_F_M_N.
## Unique Constraints

### Unique constraints

The UNIQUE CONSTRAINT designates a column or combination of columns as a unique key (not the same column(s) as the Primary Key).

To satisfy the condition, no two rows in the table can have the same value for the unique key. Although you can have only one primary key for a table, a table can have several unique keys.

### Definition

A Unique Constraint must be defined in the following fashion:

```
"UK" + n + "_" + ppppppp + "_" + ddddddd
```

where
- UK denotes Unique Constraint
- n = one-up number to distinguish potential duplicates
- ppppppp = unique key table name
- ddddddd = descriptive name

### Example

e.g. A unique constraint for SPRADDR address columns could be

UK1_SPRADDR_UNIQUE_ADDRESS.
For More Information On…

For more information on:

- Database Programming Object Naming Standards (e.g. triggers, packages, functions, cursors)
- SCT Banner Forms Architecture
- COBOL Standards
- C Standards

Refer to the SCT Banner General TRM, Chapter 1.
Section D: Data Dictionaries

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<td>D-3</td>
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<tr>
<td>SCT Banner Tables</td>
<td>D-5</td>
</tr>
<tr>
<td>Oracle Database Tools to Help You</td>
<td>D-6</td>
</tr>
</tbody>
</table>
## The Data Dictionary

| Database Information          | How do you get more information about the structure and content of tables?  |
|                              | How do you find out about users, indexes, primary keys, foreign keys?    |
|                              | How do you find out about table relationships?                           |

| Data Dictionary definition   | A set of tables and views that are used as a read-only reference about the database. |
|                              | Stores information about both the logical and physical structure of the database.* |
|                              | * Oracle 7 Server Concepts                                                 |

| Types of Data Dictionary Views | USER_xxxxx -- shows objects and events owned by user                     |
|                               | ALL_xxxxx -- shows all objects and events to which user has access        |
|                               | DBA_xxxxx -- restricted; assigned only to those with DBA role             |
Data Dictionary Views

Views

- ALL_TABLES - descriptions of tables
- ALL_COL_COMMENTS - comments on columns of accessible tables
- ALL_TAB_COLUMNS - lists of columns of all tables
- ALL_TAB_COMMENTS - comments on tables
- ALL_USERS - information on all users in database
- ALL_VIEWS - lists text of views accessible to user
- ALL_INDEXES - descriptions of indexes
- ALL_IND_COLUMNS - lists columns of the indexes

For a complete reference, refer to Oracle 7 Server Reference.

SQL

SQL> DESC ALL_USERS

SQL> SELECT *
       FROM ALL_USERS;

SQL> DESC ALL_TAB_COMMENTS

SQL> SELECT *
       FROM ALL_TAB_COMMENTS
       WHERE TABLE_NAME LIKE 'APB%';

SQL> DESC ALL_COL_COMMENTS

SQL> SELECT *
       FROM ALL_COL_COMMENTS
       WHERE TABLE_NAME = 'APBCONS';

SQL> DESC ALL_CONSTRAINTS

SQL> SELECT CONSTRAINT_NAME,
            R_CONSTRAINT_NAME
       FROM ALL_CONSTRAINTS
       WHERE TABLE_NAME = UPPER('&TABLE');

SQL> DESC DBA_OBJECTS

SQL> SELECT *
       FROM DBA_OBJECTS
       WHERE OBJECT_NAME LIKE '%&OBJ%'
       AND OWNER = 'ALUMNI';
SCT Banner Advancement Directories
# SCT Banner Tables

<table>
<thead>
<tr>
<th>Table Type</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advancement Tables</td>
<td>Advancement Supplement for the TRM, chapter 5</td>
</tr>
<tr>
<td>SCT Banner General Tables</td>
<td>SCT Banner General Technical Reference Manual, chapter 8</td>
</tr>
</tbody>
</table>
Oracle Database Tools to Help You

<table>
<thead>
<tr>
<th>Tools</th>
<th>Description</th>
</tr>
</thead>
</table>
| TOAD | Tool for Oracle Application Developers  
http://www.toadsoft.com |
| EZSQL |  
http://www.ezsql.net |
| Oracle Technology Network |  
http://technet.oracle.com |
| Infoboard.com Oracle7 Server documentation |  
Section E: PIDMs and IDs

Overview

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<th>Page</th>
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</thead>
<tbody>
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<td>PIDMs</td>
<td>E-2</td>
</tr>
<tr>
<td>ID Numbers</td>
<td>E-3</td>
</tr>
<tr>
<td>Generating a PIDM or ID</td>
<td>E-4</td>
</tr>
</tbody>
</table>
### PIDMs

**PIDMs**

All SCT Banner products store people-related records (persons and non-persons) in the database using an internal key field called a Personal Identification Master, or PIDM.

**Tables storing PIDMs**

All tables that contain data related to the person/non-person (e.g. SPRIDEN, SPRADDR, APBCONS) store the PIDM and are linked together by that number.

This internal identifier is used in the database rather than a person’s ID number, which facilitates changing the ID number. The ID number is stored only in the Person Identification/Name Table (SATURN,SPRIDEN).

**Definition**

A PIDM is a unique, one-up (sequential) number that can be generated externally or internally by adding a new record in the SCT Banner Advancement form APAIDEN.

The next sequential PIDM to be generated is stored in SOBSEQN – Sequential Number Base Table.

**Notes**

If a PIDM has been generated externally, the SOBSEQN_MAXSEQNO must be updated for the next time a PIDM or ID is generated.

The PIDM is not viewable to users in SCT Banner forms.
# ID Numbers

<table>
<thead>
<tr>
<th>ID number</th>
<th>The ID number is viewable to users in SCT Banner forms and is stored only in SPRIDEN.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Persons</td>
<td>For persons, the ID is a number of choice (e.g. college ID or Social Security Number) or a system-generated ID number.</td>
</tr>
<tr>
<td>Non-persons</td>
<td>For Non-persons, the ID is a system-generated ID number.</td>
</tr>
<tr>
<td>System-generated IDs</td>
<td>System-generated IDs are unique, one-up numbers. The next sequential ID number to be generated is stored in SOBSEQN – Sequential Number Base Table.</td>
</tr>
</tbody>
</table>
## Generating a PIDM or ID

### Generation

PIDMs and IDs can be generated externally or internally in the SCT Banner Advancement Form (APAIDEN).

The next sequential PIDM and ID numbers are stored in the table SOBSEQN, column SOBSEQN_MAXSEQNO.

If PIDM and/or ID numbers have been generated externally, the SOBSEQN_MAXSEQNO must be updated for the next time a PIDM or ID is generated, or a Duplicate Generated PIDM error or duplicate ID numbers may result.

### SOBSEQN

SQL> DESC SOBSEQN

SQL> SELECT * FROM SOBSEQN;
Section F: Biographic and Demographic Tables

Overview

In this section

These topics are covered in this section.

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<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Person Tables</td>
<td>F-2</td>
</tr>
<tr>
<td>Biographic/Demographic</td>
<td>F-3</td>
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<tr>
<td>Addresses, Telephone, Email</td>
<td>F-4</td>
</tr>
<tr>
<td>Key Advancement Tables by Module</td>
<td>F-5</td>
</tr>
</tbody>
</table>
General Person Tables

A record must have a row in the SCT Banner General system required table SPRIDEN (Personal Identification/Name Repeating Table.)

SPRIDEN includes the PIDM, ID number, name columns, and an indicator for person or non-person.

General Person Tables SPRIDEN, SPRADDR, SPRTELE, SPBPERS and GOREMAL are viewable by all SCT Banner systems (Advancement, Student, HR, Finance, and Financial Aid).

SPRIDEN

SPRIDEN – Personal Identification/Name Repeating Table
- PIDM
- ID
- Name information
- Identity – "P" for person, "C" for non-person
- Change Indicator – at least one record per ID must have a null Change Indicator value

SQL> DESC SPRIDEN

SQL> SELECT * FROM SPRIDEN
    WHERE SPRIDEN_LAST_NAME LIKE 'A%';
## Biographic/Demographic

### Contents

Information about the person – birth date, sex, marital status, social security number, citizenship, legal name, deceased indicator and date, hair color, etc.

### SPBPERS

SPBPERS – Basic Person Base Table, optional but highly recommended.

```sql
SQL> DESC SPBPERS

SQL> SELECT * FROM SPBPERS
WHERE SPBPERS_LEGAL_NAME LIKE 'A%';
```

### IDs, Names, and Biographic/Demographic

<table>
<thead>
<tr>
<th>Person</th>
<th>Constituent</th>
<th>Non-Person</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Organization Information</td>
<td>Form</td>
</tr>
<tr>
<td>P,C,NP,O</td>
<td>ID Numbers</td>
<td>APAIDEN</td>
</tr>
<tr>
<td>P,C,NP,O</td>
<td>Names</td>
<td>APAIDEN</td>
</tr>
<tr>
<td>P,C,NP,O</td>
<td>Names</td>
<td>APANAME</td>
</tr>
<tr>
<td>P,C</td>
<td>Names</td>
<td>APANAME</td>
</tr>
<tr>
<td>P,C</td>
<td>Miscellaneous Bio</td>
<td>APAPERS</td>
</tr>
</tbody>
</table>

### APAPERS

Access APAPERS.

Search for a constituent in the Key block and select.

Perform a Next Block function.

Hold [Shift] and double-click on **Date of Birth** (Dynamic Help Query).

Note the table and column name.

This is helpful when a user refers to a form field when discussing a technical need.
## Addresses, Telephone, Email

### Addresses

**SPRADDR** – Address repeating table required for constituent preferred address

### Telephone and fax numbers

**SPRTELE** – Telephone repeating table, optional

### Email addresses

**GOREMAL** – Email repeating table, optional

---

### Query Example

```
SQL> DESC SPRADDR
SQL> DESC SPRTELE
SQL> DESC GOREMAL
```

---

### Addresses, Telephone, Email Information

<table>
<thead>
<tr>
<th>Person</th>
<th>Constituent</th>
<th>Non-Person</th>
<th>Organization</th>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req'd?</th>
</tr>
</thead>
<tbody>
<tr>
<td>P,C,NP,O</td>
<td>Addresses</td>
<td>APAIDEN;AGAGIFT</td>
<td>SPRADDR</td>
<td>Repeating</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>P,C,NP,O</td>
<td>Telephone</td>
<td>APAIDEN;AGAGIFT</td>
<td>SPRTELE</td>
<td>Repeating</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>P,C,NP,O</td>
<td>Telephone</td>
<td>APATELE</td>
<td>SPRTELE</td>
<td>Repeating</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>P,C,NP,O</td>
<td>Email addresses</td>
<td>APAIDEN;AGAGIFT;APAEMAL</td>
<td>GOREMAL</td>
<td>Repeating</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**APAIDEN, APATELE, APAEMAL**

Access APAIDEN.

If a constituent is not selected in the Key block, search for a constituent and select.

Perform a Next Block function.

Select **Address** from the Options menu (SPRADDR columns in the APAIDEN form).

Select **Telephone Numbers** from the Options menu (SPRTELE columns in the APATELE form).

Exit, then select **E-mail Addresses** from the Options menu (GOREMAL columns in the APAEMAL form).
## Key Advancement Tables by Module

| Advancement Modules | • Constituent Processing  
|                     | • Organization Processing 
|                     | • Membership Processing 
|                     | • Prospect Management Processing 
|                     | • Designation Processing 
|                     | • Solicitation Organization Processing 
|                     | • Campaign Processing 
|                     | • Pledge Processing 
|                     | • Gift & Pledge Payment Processing |
Section G: Constituent and Organization Processing

Overview

In this section

These topics are covered in this section.

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</tr>
<tr>
<td>Constituents</td>
<td>G-3</td>
</tr>
<tr>
<td>Organizations</td>
<td>G-4</td>
</tr>
<tr>
<td>Constituents and Organizations: Activities, Mail, Exclusions</td>
<td>G-6</td>
</tr>
<tr>
<td>Constituents and Organizations: Giving History</td>
<td>G-7</td>
</tr>
<tr>
<td>Constituents Only: Relationships, Academics, Employment</td>
<td>G-8</td>
</tr>
<tr>
<td>Organizations Only: Contacts, Funds, Matching Gifts</td>
<td>G-9</td>
</tr>
<tr>
<td>APRXREF</td>
<td>G-10</td>
</tr>
</tbody>
</table>
Constituent and Organization Processing

Constituents and Organizations

Although Constituent Processing and Organization Processing are functionally distinct in SCT Banner, technically they share many common tables.

Constituents and Organizations are Persons and Non-persons from SPRIDEN who are identified in the Advancement system with a Donor category code, showing their relationship to Advancement (e.g. Alumni, Parent, Friend, Corporation, Foundation, etc.).

Tables

- APRCATG – Alumni Category Repeating Table, required. Identifies all persons/non-persons associated with Advancement by a Donor category code (column APRCATG_DONR_CODE and validation table column ATVDONR_CODE).
- APBCONS – Constituent base table, required for constituents.
- AOBORGN – Organization base table, required for organizations.

Diagram

![Diagram of Personal Identification Repeating Table, SPRIDEN, pidm, AOBORGN, APBCONS, APRCATG, One to many relationship]
Constituents

**APRCATG, ATVDONR**

SQL> DESC APRCATG

SQL> SELECT * FROM APRCATG;

SQL> DESC ATVDONR

SQL> SELECT * FROM ATVDONR;

**Constituents**

A constituent in SCT Banner:

- Is a SPRIDEN "Person" (column SPRIDEN_ENTITY_IND = ‘P’)
- Has a valid Address Type in the SPRADDR table (column SPRADDR_ATYP_CODE and validation table column STVATYP_CODE)
- Has a record and Donor code in APRCATG – Alumni Donor Category Repeating Table, e.g. Alumni, Parent, Friend (APRCATG_DONR_CODE and validation table column ATVDONR_CODE);
- Has a record in APBCONS – Constituent Base Table.
## Organizations

**APBCONS, STVATYP**

```sql
SQL> DESC APBCONS;

SQL> SELECT * FROM APBCONS;

SQL> DESC STVATYP;

SQL> SELECT * FROM STVATYP;
```

### Organizations

An Organization in SCT Banner:

- Is a SPRIDEN "Non-Person" (column SPRIDEN_ENTITY_IND = ‘C’)
- Has a valid Address Type in the SPRADDR table (column SPRADDR_ATYP_CODE and validation table column STVATYP_CODE)
- Has a record and Donor code in APRCATG – Alumni Donor Category Repeating Table, e.g., Corporation, Foundation, Organization (APRCATG_DONR_CODE and validation table column ATVDONR_CODE);
- Has a record in AOBORGN – Organization Base Table.

**AOBORGN**

```sql
SQL> DESC AOBORGN;

SQL> SELECT * FROM AOBORGN;
```

### APRCATG, APBCONS, AOBORGN

<table>
<thead>
<tr>
<th>Organization</th>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req'd?</th>
</tr>
</thead>
<tbody>
<tr>
<td>C, O</td>
<td>Donor Category</td>
<td>APBCONS;AOBORGN</td>
<td>APRCATG</td>
<td>Repeating</td>
<td>Y</td>
</tr>
<tr>
<td>C</td>
<td>Names</td>
<td>APANAME</td>
<td>APBCONS</td>
<td>Base</td>
<td>Y</td>
</tr>
<tr>
<td>O</td>
<td>Business, MG info</td>
<td>AOBORGN</td>
<td>AOBORGN</td>
<td>Base</td>
<td>Y</td>
</tr>
</tbody>
</table>

*Continued on the next page*
Organizations, Continued

<table>
<thead>
<tr>
<th>APACONS, AOAORGN</th>
<th>Access APACONS.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If a constituent is not selected in the Key block, search for a constituent and select.</td>
</tr>
<tr>
<td></td>
<td>Perform a Next Block function.</td>
</tr>
<tr>
<td></td>
<td>Hold [Shift] and double-click on Category (Dynamic Help Query). This is the APRCATG_DONR_CODE.</td>
</tr>
<tr>
<td></td>
<td>Exit Dynamic Help Query and double-click on Category again (without the [Shift] key). This is the list of values (LOV).</td>
</tr>
<tr>
<td></td>
<td>You may repeat this exercise in AOAORGN with a selected organization.</td>
</tr>
</tbody>
</table>
Constituents and Organizations: Activities, Mail, Exclusions

Optional tables

Constituent and Organization Processing - optional tables:

- Activities and leadership
  APRACTY, APRACYR, APRACLD
- Mail and salutations
  APRMAIL, APRSALU
- Exclusions
  APREXCL
- Confidentiality Comments
  APRCONF, APRPCMT, APRSUBJ
- Special purpose
  APRVIPC

Diagram

Person
Constituent
Non-Person

<table>
<thead>
<tr>
<th>Organization</th>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req'd?</th>
</tr>
</thead>
<tbody>
<tr>
<td>P,O</td>
<td>Activities</td>
<td>APAACTY</td>
<td>APRACTY</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>P,O</td>
<td>Activity years</td>
<td>APAACTY</td>
<td>APRACYR</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>P,O</td>
<td>Activity leadership</td>
<td>APAACTY</td>
<td>APRACLD</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>P,O</td>
<td>Mailing lists</td>
<td>APAMAIL</td>
<td>APRMAIL</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>P,O</td>
<td>Salutations</td>
<td>APAMAIL</td>
<td>APRSALU</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>P,O</td>
<td>Exclusions</td>
<td>APAMAIL</td>
<td>APREXCL</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>P,O</td>
<td>Variable purpose</td>
<td>APASPUR</td>
<td>APRVIPC</td>
<td>Repeating</td>
<td>N</td>
</tr>
</tbody>
</table>
Constituents and Organizations: Giving History

**Tables**
Constituent and Organization Processing - optional tables:
- APRCHIS – Giving History by Campaign Repeating Table
- APRDHIS – Giving History by Campaign Repeating Table
- APRFHIS – Giving History by Fiscal Year Repeating Table
- APBGHIS – Giving History Summary Base Table
- APRDCLB – Gift Society Table
- APRDCPR – Gift Society Benefits/Premiums Table
- APRDCCM – Gift Society Comments Table

**SQL scripts**
Scripts can be found in the alumni/plus directory
- AFIXPD.SQL – creates/updates history records from gift and pledge detail records.
- AFIXPD.SQL -- updates APRDHIS, APRCHIS, ADRSUMM, AFRDESG, and ADBDESG
- AFIXGHIS.SQL – updates the APBGHIS, the Giving History Summary Base Table

**Diagram**

**Person**
Constituent
Non-Person

**Organization Information**
Form | Table | Type | Req'd?
--- | --- | --- | ---
C,O Giving History Summary | APAGHIS | APBGHIS | Base | N
C,O Giving History by Campaign | APACHIS | APRCHIS | Repeating | N
C,O Giving History by Designation | APADHIS | ABRDHIS | Repeating | N
C,O Gift Society | APADCLB | APRDCLB | Repeating | N
C,O Gift Society Benefits/Premiums | APADCLB | APRDCPR | Repeating | N
C,O Gift Society Comments | APADCLB | APRDCCM | Repeating | N
Constituents Only: Relationships, Academics, Employment

Tables
Constituent Processing - optional tables:
- Spouses
  APRCSPS, APRXREF
- Children
  APRCHLD, APRCCMT, APRXREF
- Degrees and majors
  APRADEG, APRAMAJ
- Employment
  APREHIS, APRECMT, APRXREF

Diagram

<table>
<thead>
<tr>
<th>Person</th>
<th>Constituent</th>
<th>Non-Person</th>
<th>Organization</th>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req’d?</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>Spouse</td>
<td></td>
<td>C</td>
<td>Spouse</td>
<td>APACONS</td>
<td>APRCSIS</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>C, O</td>
<td>Cross-references</td>
<td></td>
<td>C, O</td>
<td>Cross-references</td>
<td>APAXREF</td>
<td>APRXREF</td>
<td>Repeating</td>
<td>N*</td>
</tr>
<tr>
<td>C</td>
<td>Children</td>
<td></td>
<td>C</td>
<td>Children</td>
<td>APACHLD</td>
<td>APRCHLD</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>C</td>
<td>Children comments</td>
<td></td>
<td>C</td>
<td>Children comments</td>
<td>APACHLD</td>
<td>APRCCMT</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>C</td>
<td>Academic</td>
<td></td>
<td>C</td>
<td>Academic</td>
<td>APAADEG</td>
<td>APRADEG</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>C</td>
<td>Majors</td>
<td></td>
<td>C</td>
<td>Majors</td>
<td>APAADEG</td>
<td>APRAMAJ</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>C</td>
<td>Employment</td>
<td></td>
<td>C</td>
<td>Employment</td>
<td>APABHIS</td>
<td>APREHIS</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>C</td>
<td>Employment comments</td>
<td></td>
<td>C</td>
<td>Employment comments</td>
<td>APABHIS</td>
<td>APRECMT</td>
<td>Repeating</td>
<td>N</td>
</tr>
</tbody>
</table>

*Required only if APRCSPS_SPS_PIDM/APRCSPS_XREF_CODE, APRCHLD_CHLD_PIDM/APRCHLD_XREF_CODE, and/or APREHIS_EMPR_PIDM and APREHIS_XREF_CODE are populated
Organizations Only: Contacts, Funds, Matching Gifts

Tables

Organization Processing - optional tables:
- AORCONT – Organization Contact Repeating Table
- AORFUND – Organization Fund Table
- AORMAST – Matching Gift Alumni Status Table
- AORMERQ – Matching Gift Employment Requirements Table
- AORMPRO – Matching Gift Procedure Table
- AORMGCM – Matching Gift Comments Table

Other optional Organization Processing tables can be found in the SCT Banner Advancement TRM Supplement, chapter 2.

Diagram

 SPRIDEN  pIdm  AOBOGN

 Organization Base Table

 AORFUND  AORCONT  AORMAST  AORMERQ  AORMPRO  AORMGCM

 Org Fund  Org Contacts  Org Alumni Status  MG Empl Requirements  MG Procedures  MG Comments

One to many relationship
APRXREF

APRXREF – Cross-Reference Repeating Table

APRXREF cross-references two PIDMs per row, creating a relationship.

The relationship is defined in the APRXREF column APRXREF_XREF_CODE (e.g. Parent, Spouse, Child, Friend, Nephew, Employer, Employee, etc.) These codes must be in the validation table ATVXREF.

```
SQL> DESC APRXREF

SQL> SELECT * FROM APRXREF;

SQL> DESC ATVXREF

SQL> SELECT * FROM ATVXREF;
```
## Section H: Additional Processing

### Overview

These topics are covered in this section.

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</tr>
<tr>
<td>Membership/Dues Payment Processing</td>
<td>H-4</td>
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<td>Prospect Management Processing</td>
<td>H-5</td>
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<td>Solicitor Organization Processing</td>
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<td>Designation Processing</td>
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<td>Campaign Designations</td>
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<td>Pledges: Memo (Soft) Credit</td>
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</tr>
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<td>Gift and Pledge Payment Processing</td>
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<tr>
<td>Gift/Pledge Payments: Multiple (Hard) Credit</td>
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</tr>
<tr>
<td>Gift/Pledge Payments: Memo (Soft) Credit</td>
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<tr>
<td>Matching Gifts</td>
<td>H-17</td>
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<td>Process Flow Diagrams</td>
<td>H-19</td>
</tr>
<tr>
<td>Summary</td>
<td>H-20</td>
</tr>
</tbody>
</table>
Membership Processing

Diagram

- Membership Header Table
  - AABMSHP
  - AARMBIN
    - Membership Header Interest Table
  - AARMBCM
    - Membership Header Comments Table
  - Membership Interest Header Table
    - AABMINI
    - AARINC
      - Membership Header Interests Comments Table

One to many relationship
Membership/Dues Payment Rules

Diagram

Membership
Acknowlegement
Rules Table

rule_no
letter_code

AARACKR

AARAKMB
Membership
Include/Exclude
Rules Table

AARAKDN
Membership Donor
Categories Include/Exclude
Rules Table

AARAKIN
Membership Interest
Include/Exclude
Rules Table

AARAKCT
Membership Category Type
Code for Include/Exclude
Rules Table

AARAKEX
Membership Exclusion Code for
Include/Exclude Rules Table

AARMBRL
Membership
Rules Table

AARMBDP
Membership Default
Premium/Benefits
Rules Table

AGRADJR
Prior Years
Adjustment Rules Table
Membership/Dues Payment Processing

Diagram

Key fields are PIDM+ other column(s):
See Banner Adv. TRM Supplement.
Prospect Management Processing

Diagram 1

Diagram 2

©2003. Systems & Computer Technology Corporation
Advancement Technical Training
Solicitor Organization Processing

Diagram

Solicitor Organization
Base Table

ASBSORG

sol_org

ASRCORG

Hierarchy

ASRCMT

Comments

ASRSSAG

Solicitor Annual Goals

ASRSOAG

Sol. Org. Annual Goals

Solicitor Org. Repeating

ASRCORG

Contact Types

One to many relationship
Designation Processing

Designations
Gift/pledge designation codes can be entered online or converted.
ADBDESG -- Designation Base Table, required

ADBDESG
SQL> DESC ADBDESG
SQL> SELECT * FROM ADBDESG;

<table>
<thead>
<tr>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req'd?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Designation</td>
<td>ADADESG</td>
<td>ADBDESG</td>
<td>Base</td>
<td>Y</td>
</tr>
</tbody>
</table>

Designation Summary by FY
Populated by delivered history scripts (afixpd.sql)
ADRSUMM -- Designation Summary Repeating Table, required

ADRSUMM

<table>
<thead>
<tr>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req'd?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Designation by FY</td>
<td>ADASUMM</td>
<td>ADRSUMM</td>
<td>Repeating</td>
<td>Y</td>
</tr>
</tbody>
</table>

Note: Some values updated by afixpd.sql

Diagram
Campaign Processing

Campaigns

Campaign codes can be entered online or converted. AFBCAMP – Campaign Base Table, required

AFBCAMP

<table>
<thead>
<tr>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req'd?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>AFACAMP</td>
<td>AFBCAMP</td>
<td>Base</td>
<td>Y</td>
</tr>
</tbody>
</table>
Campaign Designations

Designations associated with campaigns must have a unique entry for each combination used in AFRDESG.

AFRDESG – Designation in Campaign Repeating Table, required

Each AFRDESG campaign designation must be associated with at least one campaign in AFBCAMP and one designation in ADBDESG.

AFRDESG

SQL> DESC AFRDESG

SQL> SELECT * FROM AFRDESG;

<table>
<thead>
<tr>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req’d?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign/Designation</td>
<td>APACAMP</td>
<td>AFRDESG</td>
<td>Repeating</td>
<td>Y</td>
</tr>
</tbody>
</table>

Note: Most often forgotten at conversion. Some values updated by afixpd.sql

Diagram

Designation Base Table

AFDESG

Campaign Base Table

AFBCAMP

AFRMIL

AFRSCOL

AFRORG

AFREXPN

AFROOMT

AFRCSLT

AFRCTYP

AFRCRES

One to many relationship
Pledge Processing

Tables

Required pledge tables:

- **AGBPLDG** – Pledge Base Table
- **AGRPCAM** – Pledge Campaign Repeating Table
  one record per pledge and campaign
- **AGRPDES** – Pledge Designation Repeating Table
  one record per pledge, campaign, and designation

**AGBPLDG**

SQL> DESC AGBPLDG

SQL> SELECT * FROM AGBPLDG;

<table>
<thead>
<tr>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req'd?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pledge</td>
<td>AGAPLDG</td>
<td>AGBPLDG</td>
<td>Base</td>
<td>Y</td>
</tr>
<tr>
<td>Pledge/Campaign</td>
<td>AGCPLDG</td>
<td>AGRPCAM</td>
<td>Repeating</td>
<td>Y</td>
</tr>
<tr>
<td>Pledge/Designation</td>
<td>AGCPLDG</td>
<td>AGRPDES</td>
<td>Repeating</td>
<td>Y</td>
</tr>
</tbody>
</table>

Last pledge number converted is stored in the Sequence number table – **SOBSEQN**.

**SOBSEQN**

SQL> SELECT * FROM SOBSEQN;
Pledges: Multiple (Hard) Credit

Description
Credit for the pledge amount is being split between multiple IDs. The total of amount credited to each ID must equal the amount of the pledge. *(Think of this as the tax deductible amount.)*

AGRPIDS – Pledge Multiple ID Repeating Table, optional
AGRPMLT – Detail Pledge Multiple Credit Repeating Table, optional

<table>
<thead>
<tr>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req'd?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pledge/Multiple ID Credit</td>
<td>AGAPIDS</td>
<td>AGBPIDS</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>Pledge/Multiple ID Credit Detail</td>
<td>AGCPMLT</td>
<td>AGRPMLT</td>
<td>Repeating</td>
<td>N*</td>
</tr>
</tbody>
</table>

* Required if AGRPIDS is populated.
Pledges: Memo (Soft) Credit

Description
Credit for the pledge amount is being given to multiple IDs. The total amount of memo credit given is unlimited. *(Think of this as the donor amount, rather than a tax-deductible amount.)*

AGRPMEM – Pledge Memo ID Repeating Table, optional
AGRPMMO -- Detail Pledge Memo Credit Repeating Table, optional

<table>
<thead>
<tr>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req'd?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pledge/Memo ID Credit</td>
<td>AGAPMEM</td>
<td>AGBPMEM</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>Pledge/Memo ID Credit Detail</td>
<td>AGCPMMO</td>
<td>AGRPMMO</td>
<td>Repeating</td>
<td>N*</td>
</tr>
</tbody>
</table>

* Required if AGRPMEM is populated.
Pledges: Solicited

Description

AGRPSOL is populated when a pledge is the result of a solicitation effort.

AGRPSOL -- Pledge Solicitor Repeating Table, optional

<table>
<thead>
<tr>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req'd?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pledge/Solicitation</td>
<td>AGAPSOL</td>
<td>AGBP SOL</td>
<td>Repeating</td>
<td>N</td>
</tr>
</tbody>
</table>

Diagram

One to many relationship
Gift and Pledge Payment Processing

Tables

Required Gift tables:
- AGBGIFT – Gift/Pledge Payment Base Table
- AGRGPAY – Gift/Pledge Payment Repeating Table
- AGRGCAM – Gift/Pledge Payment Campaign Repeating Table
- AGRGDES – Gift/Pledge Payment Designation Repeating Table

```
SQL> DESC AGBGIFT;

SQL> DESC AGRGPAY;
```

Gift numbers and associations

Each gift must be assigned a unique gift number and must be associated with at least one campaign and one designation which is validated against the Designation in Campaign table (AFRDESG).

If the gift is payment toward a pledge, then the pledge number must exist in the pledge tables.

The last gift number converted is stored in the Sequence number table (SOBSEQN).

<table>
<thead>
<tr>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req'd?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gift/pledge payment</td>
<td>AGAGIFT</td>
<td>AGBGIFT</td>
<td>Base</td>
<td>Y</td>
</tr>
<tr>
<td>Gift/pledge payment</td>
<td>AGAGIFT</td>
<td>AGRGPAY</td>
<td>Repeating</td>
<td>Y</td>
</tr>
<tr>
<td>Gift/pledge payment campaign</td>
<td>AGAGIFT</td>
<td>AGRGCAM</td>
<td>Repeating</td>
<td>Y</td>
</tr>
<tr>
<td>Gift/pledge payment designation</td>
<td>AGAGIFT</td>
<td>AGRGDES</td>
<td>Repeating</td>
<td>Y</td>
</tr>
</tbody>
</table>
Gift/Pledge Payments: Multiple (Hard) Credit

**Description**
Credit for the gift amount is being split between multiple IDs. The total of amount credited to each ID must equal the amount of the gift. *(Think of this as the tax deductible amount.)*

AGRGIDS – Gift Multiple ID Repeating Table, optional
AGRGMLT – Detail Gift Multiple Credit Repeating Table, optional

<table>
<thead>
<tr>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req’d?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gift/pledge payment multiple ID</td>
<td>AGAGIDS</td>
<td>AGBGIDS</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>Gift/pledge payment multiple ID detail</td>
<td>AGCGMLT</td>
<td>AGBGMLT</td>
<td>Repeating</td>
<td>N*</td>
</tr>
</tbody>
</table>

* Required if AGRGIDS is populated.
Gift/Pledge Payments: Memo (Soft) Credit

Credit for the gift amount is being given to multiple IDs. The total amount of memo credit given is unlimited. *(Think of this as the donor amount, rather than a tax-deductible amount.)*

AGRGMEM – Pledge Memo ID Repeating Table, optional
AGRGMMO – Detail Pledge Memo Credit Repeating Table, optional

<table>
<thead>
<tr>
<th>Information</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req'd?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gift/pledge payment memo ID</td>
<td>AGAGMEM</td>
<td>ABRGMEM</td>
<td>Repeating</td>
<td>N</td>
</tr>
<tr>
<td>Gift/pledge payment memo ID detail</td>
<td>AGCMMO</td>
<td>ABGMMO</td>
<td>Repeating</td>
<td>N*</td>
</tr>
</tbody>
</table>

* Required if AGRGMEM is populated.
Matching Gifts

Requirements

The matching gift organization must exist in AOBORGN, and AOBORGN_MATCH_PCT and AOBORGN_MG_PIDM not null.

The persons must have an APREHIS_EMPR_PIDM and APREHIS_TO_DATE must be null or > SYSDATE.

If the constituent’s spouse has the matching company, then the Spouse Cross Reference must be established in APRXREF.

Tables

Required gift tables for matching gifts:

- AGBMGID – Matching Gift Waiting ID Base Table
- AGRMGIF – Matching Gift Identifying Repeating Table
- AGRMCAM – Matching Gift Campaign Repeating Table
- AGRMDES – Matching Gift Designation Repeating Table
- AGRGMEM – Gift Memo Credit Table (not exclusive to MGs)
- AGRGMMO – Detail Gift Memo Credit Table (not MG exclusive)

Scenarios

There are three possible scenarios:

- Employee gifts not matched
- Employee gifts matched in full or partial payment; matching employer gift number known
- Employee gifts matched in full or partial payment with matching employer gift number unknown

Details are addressed later in this workbook.

<table>
<thead>
<tr>
<th>Person</th>
<th>Table</th>
<th>Type</th>
<th>Req'd</th>
</tr>
</thead>
<tbody>
<tr>
<td>C,O</td>
<td>AGBMGID</td>
<td>Base</td>
<td>Y</td>
</tr>
<tr>
<td>C,O</td>
<td>AGRMCAM</td>
<td>Repeating</td>
<td>Y</td>
</tr>
<tr>
<td>C,O</td>
<td>AGRMDES</td>
<td>Repeating</td>
<td>Y</td>
</tr>
<tr>
<td>C,O</td>
<td>AGRMGIF</td>
<td>Repeating</td>
<td>Y</td>
</tr>
<tr>
<td>C,O</td>
<td>AGRGMEM</td>
<td>Repeating</td>
<td>Y</td>
</tr>
<tr>
<td>C,O</td>
<td>AGRGMMO</td>
<td>Repeating</td>
<td>Y</td>
</tr>
</tbody>
</table>

* Required for Matching Gifts.

** AGRGMEM and AGRGMMO (Memo Credit) are not exclusive to Matching Gifts, but are required for Matching Gifts.

Continued on the next page
Matching Gifts, Continued

Diagram
Process Flow Diagrams

Review materials

For process flow diagrams, review:
- Advancement Supplement to the TRM, Chapter 1
- General TRM, Chapter 7
Summary

Each module can be updated independently, but keep in mind that keys to one table may be made up of data elements from another table which requires a particular order.

Familiarity with the online forms helps users understand the tables, as well as answering the users’ questions and needs.
# Section I: Conversions

## Overview

These topics are covered in this section.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversions</td>
<td>I-2</td>
</tr>
<tr>
<td>Conversion Strategies</td>
<td>I-3</td>
</tr>
<tr>
<td>Conversion Steps</td>
<td>I-5</td>
</tr>
<tr>
<td>Conversion Considerations</td>
<td>I-6</td>
</tr>
<tr>
<td>Conversion Code Standards</td>
<td>I-7</td>
</tr>
<tr>
<td>Date Standards</td>
<td>I-8</td>
</tr>
<tr>
<td>Date Settings</td>
<td>I-9</td>
</tr>
<tr>
<td>Name Standards</td>
<td>I-10</td>
</tr>
<tr>
<td>Address Standards</td>
<td>I-11</td>
</tr>
</tbody>
</table>
## Conversions

<table>
<thead>
<tr>
<th>Notes</th>
<th>Conversions can be automatic, manual, or a combination of both.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Validation information can be keyed in by end-users. If RI is turned on, much error handling does not have to be built into scripts or programs.</td>
</tr>
<tr>
<td></td>
<td>When doing a conversion, one must keep in mind that both form-based and table-based rules must be met.</td>
</tr>
<tr>
<td></td>
<td><strong>SCT WILL HELP YOU IN DEALING WITH A CONVERSION.</strong></td>
</tr>
</tbody>
</table>
Conversion Strategies

Create data standards, especially for names and addresses

All offices need to agree to and document data standards

Determine whether you will enter the data electronically or manually

Some validation tables/forms can be entered manually in both the pre-production and production databases if the number of records is small (unlike STVSBGI!!)

If error handling is built into programs, then Referential Integrity (RI) can be turned off (not advised).

Some clients use the tape load routines (changed slightly in order to use). A tape or flat file may be used.

SOTCNVT - Conversion table (convert codes)
SOAINFR - Tape Interface Rules Form
SOASUSP - Suspense records reported here
Steps:  SOAINFR
       SOTCNVT
       SORINFR
       SOASUSP
       SORTAPE
       SOSTDEL

Determine which tables you will be using

It may be helpful to look at the forms with the users, so that you will be able to determine the tables used.

Mapping legacy data to SCT Banner

SCT Functional consultants will assist with the conversion mapping document.

Continued on the next page
Conversion Strategies, Continued

Create a Conversion Plan document

- Review the steps that are involved to get to your "go live" dates
- Create a time line
- Determine the processes that need to be written
  - Will data need to be translated?
  - Will data need to be cleaned up on legacy side?
    *YOU WILL NEED YOUR USERS!
  - Users can populate the validation tables, using some of the seed data if desired.
  - Users clean up their legacy data to conform to new SCT Banner constraints. SCT Technical Consultants assist users with data requirements, but SCT technicians do not edit client data.
  - Users verify converted data.
Conversion Steps

Steps

• Document steps as you proceed
• Review current data
• Determine scope:
  • What will you convert?
• Map legacy data to SCT Banner tables
• Write a detail plan of:
  • Data to be converted
  • SCT Banner tables to be populated
  • Deadlines/timelines
• Review plan & get approval from users
• Develop procedures & programs
• Test conversion in TEST or PPRD database
• Users verify data
• TEST again and make corrections to procedures and programs
• Do conversion in production
• Users verify data
## Conversion Considerations

<table>
<thead>
<tr>
<th>Considerations</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keeping track of PIDM on legacy system; do you have multiple IDs on legacy system?</td>
<td></td>
</tr>
<tr>
<td>Generated ID or SSN?</td>
<td></td>
</tr>
<tr>
<td>Name/Address formatting</td>
<td>Avoid &quot;#&quot; if planning to use letter generation</td>
</tr>
<tr>
<td></td>
<td>If using SCT BannerQuest, check data standard on</td>
</tr>
<tr>
<td></td>
<td>- / * + # &amp; @ $ reserved and special words</td>
</tr>
<tr>
<td>Address types</td>
<td>Terms must be YYYYTT (and TTs must be consistent)</td>
</tr>
<tr>
<td></td>
<td>e.g., 01 = Spring</td>
</tr>
<tr>
<td></td>
<td>01 &lt;&gt; Fall</td>
</tr>
<tr>
<td>Date/time stamps</td>
<td>For conversion use date/time stamp – constants</td>
</tr>
<tr>
<td></td>
<td>DATE = 01-JAN-2002</td>
</tr>
<tr>
<td></td>
<td>USER = CONV</td>
</tr>
<tr>
<td></td>
<td>ORIGIN = CONVERSION</td>
</tr>
</tbody>
</table>
Conversion Code Standards

Code standards
- Use alphabetic codes (rather than numeric) when possible.
- Do not embed spaces within a rule or validation code.
- Avoid using words that have specific meanings to the product.
- Create meaningful descriptions.
- Make all descriptions unique.
- Do not use descriptions that have abbreviated, non-English language values.
- Avoid special characters:
  - hyphen (-)  slash (/)  asterisk (*)
  - plus (+)  pound (#)  ampersand (&)
  - at (@)  dollar sign ($)
- Create meaningful codes by establishing a common method of abbreviation before values are assigned. For example:
  - Mail.
  - Mail (no period)
  - MAIL
- Use descriptive values wherever possible.
Date Standards

General recommendations

- You can enter date without separators (no spaces) or use a dash or slash as separators.
- Always enter two digits for day and month.
- If you enter only part of date, rest of current date defaults.
- If you query on data, always include the century.

In Job Submission

Use DD-MON-YYYYY format for date parameters.

In Reports and Process Output

Not all reports include century with year in output.
# Date Settings

**Date format**

A setting in the Installation Control Form (GUAINST) determines the format in which you should enter dates.

- **MDY**  Month, Day, Year
- **DMY**  Day, Month, Year
- **YMD**  Year, Month, Day

**The Century Pivot**

The setting of the Century Pivot field on the Installation Control Form (GUAINST) indicates the years before which the century defaults to 20 as opposed to 19 for two digit years.

<table>
<thead>
<tr>
<th>Date Settings: GUAINST</th>
<th>Form</th>
<th>Table</th>
<th>Type</th>
<th>Req'd?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>GUAINST</td>
<td>GUBINST</td>
<td>Base</td>
<td>Y</td>
</tr>
</tbody>
</table>

**Date Settings: GUBINST**

SQL> DESC GUBINST

SQL> SELECT * FROM GUBINST;
# Name Standards

## Punctuation

Names using a first initial and middle name should be entered with a period and one space between the initial and the name.

- Maureen Smith

Use periods and prefixes and suffixes where applicable.

- Miss
- Mrs.
- Mr.
- Rev.
- Jr.
- II
# Address Standards

## Addresses

If SCT Banner Letter Generation is used, do not use a pound sign (#) when you enter an address.

County codes are defined in the table STVCNTY.

State/province codes are defined in the table STVSTAT.

## ZIP/Postal Codes

- 5 or 9 digit
- If you enter a 9-digit ZIP code, include the hyphen.

## Nation Codes

Only enter if you want the nation to appear when the address is printed.
# Section J: Conversion Process

## Overview

These topics are covered in this section.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversion Process</td>
<td>J-2</td>
</tr>
<tr>
<td>Biographic and Demographic</td>
<td>J-4</td>
</tr>
<tr>
<td>Constituents and Organizations</td>
<td>J-5</td>
</tr>
<tr>
<td>Optional Constituent Tables</td>
<td>J-6</td>
</tr>
<tr>
<td>Optional Constituent and Organization Tables</td>
<td>J-8</td>
</tr>
<tr>
<td>Campaign and Designation</td>
<td>J-9</td>
</tr>
<tr>
<td>Pledges</td>
<td>J-10</td>
</tr>
<tr>
<td>Optional Pledge Tables</td>
<td>J-11</td>
</tr>
<tr>
<td>Gifts</td>
<td>J-12</td>
</tr>
<tr>
<td>Optional Gift Tables</td>
<td>J-14</td>
</tr>
<tr>
<td>Matching Gift Conversion Notes</td>
<td>J-15</td>
</tr>
<tr>
<td>Confirming Conversion Data</td>
<td>J-18</td>
</tr>
</tbody>
</table>
Conversion process

Diagram

Legacy System → DAT file

SQL*Loader → Temp table

OPTIONAL → VALIDATE script

CONVERT script → BANNER table

Extract files from legacy system

FTP to host/database server

Can have 1:1 relationship of legacy extract file to Banner table but typically the 1:many relationship

Continued on the next page
### Conversion process, Continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Export legacy data</strong></td>
<td>Download (export) legacy data into flat files (ASCII text, comma delimited files). FTP them into the user’s SCT Banner system folder. The legacy downloads should be organized per the SCT Banner table to be populated. e.g. for SPRIDEN, download the legacy ID and name fields. Additional legacy fields that can help with the review can be downloaded (i.e. mailing name with prefix and suffix).</td>
</tr>
<tr>
<td><strong>Write CREATE TABLE SQL script</strong></td>
<td>Write CREATE TABLE SQL script for the temporary conversion table. One method is to include SCT Banner table columns (fields) and their counterpart legacy system fields, as well as any additional helpful legacy fields and fields that will assist with organization. (i.e. perhaps a &quot;flag&quot; column for legacy values that are too long for SCT Banner.) Run script in SQL*Plus: SQL&gt; @filename</td>
</tr>
<tr>
<td><strong>Write SQL*Loader control file</strong></td>
<td>Write SQL<em>Loader control file to populate temporary conversion Oracle table with legacy data. Review the legacy flat file and keep the same column order in the control file. SQL</em>Loader is executed in UNIX: $ sqlldr username/password control=controlfilename(.ctl)</td>
</tr>
<tr>
<td><strong>Write PL/SQL conversion script</strong></td>
<td>Write PL/SQL conversion (aka &quot;load&quot;) script. This script can contain &quot;crosswalks&quot; that change legacy values and/or codes to valid SCT Banner values and/or codes. Assure that SCT Banner codes are in their validation table(s) before running the conversion script. Run script in SQL*Plus: SQL&gt; @filename</td>
</tr>
</tbody>
</table>
## Biographic and Demographic

### Advancement Conversion
- See Technical Reference Manual – General System – Chapter 4
- See Advancement Conversion Supplement to Technical Reference Conversion Notes

### Required General Tables
- SPRIDEN – Personal Identification/Name
- SPRADDR – Address
- SPRTELE – Telephone
- SPBPERS – Basic Person (optional, but recommended)

### SPRIDEN – Personal Identification/Name
- NO DUPLICATE RECORDS
- The Advancement conversion process assumes that duplicate records in SPRIDEN will not be created for a person or non-person. If there is an existing SPRIDEN record from a previous Student, HR, or Finance conversion, that PIDM will be used.
- Legacy IDs need to be matched.
- If the ID is not unique, then checks will have to be made on last name, first name, mi, perhaps birth date, to further qualify that the person does not exist.

### SPRTELE – Telephone
- Only one primary telephone number may exist for each address type and address sequence number.
- Only telephone numbers with a Primary indicator of ‘Y’ will be displayed with the address.

### SPBPERS – Basic Person
- Although this table is not required, it is recommended that all constituents have a record in this table.
- At a minimum, the SPBPERS_SEX should be entered (‘F’ for female, ‘M’ for male, ‘N’ for not available).
Constituents and Organizations

<table>
<thead>
<tr>
<th>Constituent and Organization Tables</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>APRCATG – Alumni Donor Category</td>
<td>The PIDM from the SPRIDEN table is required to insert into this table. This table contains the donor category from the ATVDONR validation table. You can use a default value for a particular group.</td>
</tr>
<tr>
<td>APBCONS – Constituent Base</td>
<td>The PIDM from the SPRIDEN table is required to insert into this table. Each constituent must have a valid address type in the SPRADDR table. For an Alumnus category, the preferred class year and preferred college code are required fields. For non-Alumni, the preferred class year default is ‘0000’ (four zeros) and the preferred college code is ’00’ (two zeros). ’00’ must exist in STVCOLL.</td>
</tr>
<tr>
<td>AOBORGN – Organization Base</td>
<td>The PIDM from the SPRIDEN table is required to insert into this table. You can use a default value in the business field (AOBORGN_BUSINESS) if the business is unknown.</td>
</tr>
</tbody>
</table>
### Optional Constituent Tables

<table>
<thead>
<tr>
<th>Tables</th>
<th>Description</th>
</tr>
</thead>
</table>
| APRCSPS – Constituent Spouse | • Requires either the APRCSPS_SPS_PIDM or APRCSPS_LAST_NAME; not both.  
• If using APRCSPS_SPS_PIDM (both spouses in system):  
  • Populate the APRCSPS_XREF_CODE and create two APRXREF records (Person A xref B and person B xref A);  
  • APRXREF_DM_PRI_IND for combined mailing should be ‘P’ for primary spouse and ‘S’ for secondary spouse;  
• Assure that two APRCSPS records are created for both spouses. |
| APRCHLD – Children | • Requires either the APRCHLD_CHLD_PIDM or APRCHLD_LAST_NAME, not both.  
• If using APRCHLD_CHLD_PIDM (child is in the system), populate the APRCHLD_XREF_CODE and create two APRXREF records (Person A xref B and person B xref A). |
| APRCCMT – Children Comment | • This table is created if comments exist for children.  
• A corresponding row is required in the Children Repeating Table APRCHLD.  
• The Children table and Children Comment tables have sequence numbers so that the two tables coincide (APRCHLD_SEQ_NO = APRCCMT_CHLD_SEQ_NO). |
| APRADEG – Academic Degree | • This table is created for degreed students who have Academic Degree information.  
• The Institution code (APRADEG_SBGI_CODE) can be a default value which represents your institution code. |

*Continued on the next page*
### Optional Constituent Tables, Continued

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
</table>
| **APRAMAJ – Academic Major** | *This table is created for degreed students who have Major information for the degrees just created.*  
- The Academic Degree table and the Major table have sequence numbers so that the two tables coincide (APRADEG_SEQ_NO = APRAMAJ_ADEG_SEQ_NO). |
| **APREHIS – Employment History** | *This table is created for constituents Employment History.*  
- Requires either APREHIS_EMPR_PIDM or APREHIS_EMPR_NAME; not both.  
- If using APREHIS_EMPR_PIDM (employer is in the system), populate the APREHIS_XREF_CODE and create two APRXREF records (Person xref Employer and Employer xref Person). |
| **APRECMT – Employment History Comment** | *This table is created if employment comments exist.*  
- A corresponding row is required in the Employment History Table APREHIS.  
- The Employment History table and Employment History Comments table have sequence numbers so that the two tables coincide (APREHIS_SEQ_NO and APRECMT_EHIS_SEQ_NO). |
### Optional Constituent and Organization Tables

<table>
<thead>
<tr>
<th>Tables</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>APRACTY</td>
<td>Special Activity</td>
</tr>
<tr>
<td>APRACYR</td>
<td>Special Activity Years</td>
</tr>
<tr>
<td>APRACLD</td>
<td>Special Activity Leadership</td>
</tr>
<tr>
<td>APRMAIL</td>
<td>Mail Code</td>
</tr>
<tr>
<td>APRVIPC</td>
<td>Variable Purpose</td>
</tr>
<tr>
<td>APREXCL</td>
<td>Exclusion Code</td>
</tr>
<tr>
<td>APRSALU</td>
<td>Salutation</td>
</tr>
</tbody>
</table>
**Campaign and Designation**

**Required Campaign and Designation Tables**
- AFBCAMP – Campaign Header
- ADBDESG – Designation
- AFRDESG – Campaign/Designation
- ADRSUMM – Designation by Fiscal Year Summary

**AFBCAMP – Campaign Header**
- Can be entered online via the Campaign Header Form (AFACAMP)
- This table should be established before Pledge and Gift conversions.

**ADBDESG – Designation**
- Can be entered online via the Designation Form (ADADESG).
- This table should be established before Campaign information and Pledge and Gift conversions.
- Finance account information is stored in this table.
  - If SCT BANNER FINANCE is installed, then populate these fields:
    - ADBDESG_COAS_CODE
    - ADBDESG_ACCI_CODE
    - ADBDESG_FUND_CODE
    - ADBDESG_ORGN_CODE
    - ADBDESG_ACCT_CODE
    - ADBDESG_PROG_CODE
    - ADBDESG_ACTV_CODE
    - ADBDESG_LOCN_CODE
  - If SCT BANNER FINANCE is not installed, then populate the field:
    - ADBDESG_GL_NO_CREDIT

**AFRDESG – Campaign/Designation**
- Should be established before Pledge and Gift conversions.
- A row must exist in this table for each unique campaign/designation combination on each pledge/gift detail record converted.
- Can be entered online on the Campaign/Designation Header Form (AFADESG).

**ADRSUMM – Designation by Fiscal Year Summary**
- Created and updated by the afixpd.sql.
Pledges

Required Pledge Tables

- AGBPLDG – Pledge Base Table
- AGRPCAM – Pledge Campaign
- AGRPDES – Pledge Designation

AGBPLDG – Pledge Base Table

Each pledge must be associated with at least one campaign and designation.

The AGBPLDG_PIDM is the donor (constituent/organization) PIDM from SPIDEN.

Each pledge number (AGBPLDG_PLEDGE_NO) must be assigned a unique, one up number. The one up pledge number is maintained in SOBSEQN with a value of ALUMNIPLEDGE in the SOBSEQN_FUNCTION column.

Use numbers only and use all seven positions (e.g. 0000001).

Steps required to create a new pledge number:
1. Retrieve pledge number from SOBSEQN
2. Add 1 to the number to create a new pledge number
3. Update the SOBSEQN table with the new pledge number
4. Use the new pledge number in the record being created

AGRPCAM – Pledge Campaign

A detailed record of pledge amounts and balances by constituent/organization, pledge, and campaign.

One record is inserted into this table for each AGBPLDG pledge’s Pledge and Campaign combination (at least one record will be inserted per pledge).

The sum of AGRPCAM_AMT for a pledge number must equal AGBPLDG_AMT_PLEDGED for that pledge number.

AGRPDES – Pledge Designation

The amount pledged for the constituent/organization, pledge number, campaign, and designation.

One record is inserted for each AGBPLDG pledge’s Pledge, Campaign, and Designation combination.

The sum of AGRPDES_AMT for the AGRPDES_CAMPAIGN must equal the amount for the campaign (AGRPCAM_AMT).
## Optional Pledge Tables

<table>
<thead>
<tr>
<th>Tables</th>
</tr>
</thead>
<tbody>
<tr>
<td>• AGRPSOL – Pledge Solicitation</td>
</tr>
<tr>
<td>• AGRPIDS – Pledge Multiple ID Credit</td>
</tr>
<tr>
<td>• AGRPMLT – Pledge Multiple ID Credit Detail</td>
</tr>
<tr>
<td>• AGRPMEM – Pledge Memo ID Credit</td>
</tr>
<tr>
<td>• AGRPMEMO – Pledge Memo ID Credit Detail</td>
</tr>
</tbody>
</table>

**AGRPSOL – Pledge Solicitation**

If solicitation is used, you will need to input at least one of these three fields:

- AGRPSOL_SOLC_CODE
- AGRPSOL_SOL_ORG
- AGRPSOL_SOL_PIDM

**AGRPIDS – Pledge Multiple ID Credit**

- Updated when a pledge is split between multiple IDs.
- Each ID will receive credit for the amount being multiplied.

**AGRPMLT – Pledge Multiple ID Credit Detail**

- Required if the AGRPIDS table has been populated.
- A detail record is created for each campaign/designation combination of the split pledge in AGRPIDS.

**AGRPMEM – Pledge Memo ID Credit**

- Updated when a pledge is soft credited to someone other than the donor.

**AGRPMMO – Pledge Memo ID Credit Detail**

- Required if the AGRPMEM table has been populated.
- A detail record is created for each campaign/designation combination of the pledge.
Gifts

<table>
<thead>
<tr>
<th>Required Gift Tables</th>
<th>AGBGIFT – Gift Base Table</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AGRGPAY – Gift/Pledge Payment</td>
</tr>
<tr>
<td></td>
<td>AGRGCAM – Gift Campaign</td>
</tr>
<tr>
<td></td>
<td>AGRGDES – Gift Designation</td>
</tr>
</tbody>
</table>

**AGBGIFT – Gift Base Table**

Each gift must be associated with at least one campaign and designation.

The AGBGIFT_PIDM is the donor (constituent/organization) PIDM from SPIDEN.

Each gift number (AGBGIFT_GIFT_NO) must be assigned a unique, one up number.

The one up gift number is maintained in SOBSEQN with a value of ALUMNIGIFT in the SOBSEQN_FUNCTION column.

Use numbers only and use all seven positions (e.g. 0000001).

**Creating a new gift number**

Steps required to create a new gift number:

1. Retrieve gift number from SOBSEQN
2. Add 1 to the number to create a new gift number
3. Update the SOBSEQN table with the new gift number
4. Use the new gift number in the record being created

**AGBGIFT indicators**

- AGBGIFT_FINAL_IND = ‘F’
- AGBGIFT_MATCH_PROCESSED = ‘Y’
- AGBGIFT_FEED_IND = ‘Y’
- AGBGIFT_GACK_IND = ‘Y’
- AGBGIFT_RECEIPT_IND = ‘Y’

**AGRGPAY – Gift/Pledge Payment**

- Contains the gift number from AGBGIFT and an associated pledge number from AGBPPLDG if it is a pledge payment. If not a pledge payment, set AGRGPAY_PLEDGE_NO = 0000000 (7 zeros).
- At least one record created for each gift.
- Sum of AGRGPAY_AMT must equal AGBGIFT_AMT_TOT.

Continued on the next page
Gifts, Continued

AGRCAM – Gift Campaign

- One record is created for each gift, pledge, and campaign combination.
- At least one record is required for each gift.
- The sum of AGRGCAM_AMT must equal AGRGPAY_AMT for each PIDM, gift number and pledge number.

AGRGDES – Gift Designation

- Contains the gift number from AGBGIFT and a pledge number from AGBPLDG, if it is a pledge payment.
- One record is inserted for each gift, pledge, and campaign combination. At least one record for each gift.
- The sum of AGRGDES_AMT must equal AGRGCAM_AMT for each PIDM, gift number, pledge number and campaign.
## Optional Gift Tables

### Tables
- AGRGSOL – Gift Solicitation
- AGRGIDS – Gift Multiple ID Credit
- AGRGMLT – Gift Multiple ID Credit Detail
- AGRGMEM – Gift Memo ID Credit
- AGRGMMO – Gift Memo ID Credit Detail

### AGRGSOL – Gift Solicitation
If solicitation is used, you will need to input at least one of these three fields:
- AGRGSOL_SOLC_CODE
- AGRGSOL_SOL_ORG
- AGRGSOL_SOL_PIDM

### AGRGIDS – Gift Multiple ID Credit
- Updated when a gift is split between multiple IDs.
- Each ID will receive credit for the amount being multiplied.

### AGRGMLT – Gift Multiple ID Credit Detail
- Required if the AGRGIDS table has been populated.
- A detail record is created for each campaign/designation combination of the split gift in AGRGIDS.

### AGRGMEM – Gift Memo ID Credit
- Updated when a gift is soft credited to someone other than the donor.

### AGRGMMO – Gift Memo ID Credit Detail
- Required if the AGRGMEM table has been populated.
- A detail record is created for each campaign/designation combination of the gift.
## Matching Gift Conversion Notes

### Scenarios

Three possible scenarios:

- Employee gifts not matched
- Employee gifts matched in full or partial payment; matching employer gift number known
- Employee gifts matched; matching employer gift number unknown

### Employee gifts not matched

Employee gift info must exist in:

- AGBGIFT, AGRGCAM, AGRGDES, AGRGPAY
- AGBGIFT_MATCH_PROCESSED flag = ‘N’

Run the Matching gift allocation report (AXPMATG or AGPMATG) to create the anticipated matches.

### Employee gifts matched; employer gift # known

Employee gift info in four tables:

- AGBGIFT, AGRGCAM, AGRGDES, AGRGPAY

Employer gift info in four tables:

- AGBGIFT, AGRGCAM, AGRGDES, AGRGPAY

AGBGIFT_MATCH_PROCESSED flag = ‘Y’ for both employer and employee gifts.

Tables required:

- AGBMGID – Matching Gift Waiting ID Base Table
  One record per employee gift and for any spouse gifts per MG organization eligible to be matched

Continued on the next page
Matching Gift Conversion Notes, Continued

Employee gifts matched; employer gift # known (cont.)

- Status column: ‘I’ (incomplete) for partial;
  ‘P’ (paid) for fully matched gifts;
  blank for gifts with no payments

- AGRMCAM – Matching Gift Campaign Repeating Table
  - One record for each campaign associated with each employee
  - Gift info derived from employee’s AGRGCAM record
  - Campaign match amount = campaign amount * organization match percentage
  - Sum of AGRMCAM_AMT must equal AGBMGID_AMT for employer pidm

- AGRMDES – Matching Gift Designation Repeating Table
  - One record for each campaign/designation combination associated with employee gift
  - Info derived from employee’s AGRGDES record
  - Designation match amount = designation amount * organization match percentage
  - Sum of AGRMDES_AMT must equal AGRMCAM_AMT for employer pidm

- AGRMGIF – Matching Gift Payment Repeating Table
  - One record for each matching gift payment
  - Information must match a record in the AGBMGID table

If employee gift had solicitation information, AGRMSOL record should be created.

Memo credit given to employees: AGRGMEM, AGRGMMO
AGBMGID_STATUS = ‘P’ (Fully paid) or ‘I’ (> 0 and less than anticipated amount)

AGBMGID_AMT_PAID derived from AGRMGIF_AMT

Continued on the next page
Matching Gift Conversion Notes, Continued

**Employee gifts matched; matching employer gift number unknown**

Employee gift info in four tables:
- AGBGIFT, AGRGCAM, AGRGDES, AGRGPAY

Employer gift info in four tables:
- AGBGIFT, AGRGCAM, AGRGDES, AGRGPAY

AGBGIFT_MATCH_PROCESSED flag = ‘Y’ for both employer and employee gifts.

Memo credit given to employees (or their spouses and any ID receiving multiple credit, if applicable): AGRGMEM, AGRGMMO

Create memos records even if actual employee gift not known.

Do **not** create records in AGBMIGID, AGRMCAM, AGRMDES.

**AGRGMEM, AGRGMMO**

- Memo credit given to each employee from employer gift in the amount of individual matching payment
- Memo credit given to any multiple ID associate with the employee gift (i.e., soft credit to spouse)
Confirming Conversion Data

Forms to check

Forms to check when conversion is complete if the employer gift is known which matches the employee gift:

- AGAMGIF - Matched Gifts by Employee Form
- AGAMATP - Paid Matched Gifts by Employer Form
- AGAMATG - Employer Matching Gift Payment Form
# Section K: Migration to Advancement

## Overview

These topics are covered in this section.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Migration to Production</td>
<td>K-2</td>
</tr>
<tr>
<td>Shared Tables/Ethnicity Codes</td>
<td>K-3</td>
</tr>
<tr>
<td>Shared Procedures and Triggers</td>
<td>K-4</td>
</tr>
<tr>
<td>Advancement Reports and Scripts</td>
<td>K-5</td>
</tr>
<tr>
<td>Defining New Reports and Processes to Job Submission</td>
<td>K-6</td>
</tr>
<tr>
<td>Mailing Label</td>
<td>K-7</td>
</tr>
<tr>
<td>Population Selections</td>
<td>K-8</td>
</tr>
</tbody>
</table>
Migration to Production

Tables

- Tables:
  - Are to be built in test environment for migration to production;
  - Should not be cleared when preparing for production environment.

All tables containing PIDMs and/or dollar amounts should be cleared of existing records.

Review SOBSEQN table

SOBSEQN_MAXSEQNO values for ALUMNIDUES, ALUMNIPLEDGE, and ALUMNIGIFT should be reset.

Validation tables that are either shared with other modules (student, HR) or contain values that are defined by CASE for matching gifts should remain the same.
### Shared Tables/Ethnicity Codes

<table>
<thead>
<tr>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refer to the SCT Banner General Technical Reference Manual, chapter 6 for a list of shared tables and a discussion of the use of ethnicity codes in STUDENT and HR.</td>
</tr>
</tbody>
</table>
## Shared Procedures and Triggers

| Commonly executed logic | • Commonly executed logic can be maintained in one location, rather than repeated in multiple forms through use of referenced procedures  
  • Found in GOQRPLS library  
  • Listed in SCT Banner General TRM, chapter 2, pp.15-25 |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Existing triggers        | Some Forms 2.3 triggers still exist because of cross-product dependencies.  
  These include:  
  • WHEN-BUTTON-PRESSED (all standard buttons)  
  • WHEN-TIMER-EXPIRED (key option list window)  
  • WHEN-WINDOW-ACTIVATED (opening window)  
  • WHEN-WINDOW-CLOSED (closing window) |
## Advancement Reports and Scripts

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Advancement reports - UNIX</td>
<td><strong>Accessing report directory:</strong>&lt;br&gt;cd /…/alumni/c&gt; &lt;br&gt;ls -l</td>
</tr>
<tr>
<td></td>
<td><strong>Reading a report program:</strong>&lt;br&gt;vi filename.extension&lt;br&gt;control n for next line&lt;br&gt;:q! to quit vi without saving</td>
</tr>
<tr>
<td>Advancement scripts - UNIX</td>
<td><strong>Accessing script directory:</strong>&lt;br&gt;cd /…/alumni/plus&gt; &lt;br&gt;ls -l</td>
</tr>
<tr>
<td></td>
<td><strong>Reading a script:</strong>&lt;br&gt;vi filename.extension&lt;br&gt;control n for next line&lt;br&gt;:q! to quit vi without saving</td>
</tr>
</tbody>
</table>
# Defining New Reports and Processes to Job Submission

<table>
<thead>
<tr>
<th>Reference</th>
<th>Review Using SCT Banner General, chapter 4.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Submissions</strong></td>
<td>Run process and reports from the Process Submission Control Form (GJAPCTL).</td>
</tr>
<tr>
<td></td>
<td>• Printer: DATABASE</td>
</tr>
<tr>
<td></td>
<td>• View or Print from GJIREVO</td>
</tr>
<tr>
<td><strong>Example:</strong> GURPDED procedure</td>
<td>Run from GJAPCTL, or enter GURPDED in Direct Access</td>
</tr>
<tr>
<td></td>
<td>• Printer: DATABASE</td>
</tr>
<tr>
<td></td>
<td>• Enter Parameters:</td>
</tr>
<tr>
<td></td>
<td>• User ID: ALUMNI</td>
</tr>
<tr>
<td></td>
<td>• Table: APBCONS</td>
</tr>
<tr>
<td><strong>Forms</strong></td>
<td>• GUAOBJS – create new process as a SCT Banner object</td>
</tr>
<tr>
<td></td>
<td>• GJAJOBS – define new process</td>
</tr>
<tr>
<td></td>
<td>• GSASECR – set up BANSECR security</td>
</tr>
<tr>
<td></td>
<td>• GJAPDEF – define associated parameters</td>
</tr>
<tr>
<td></td>
<td>• GJAPVAL – define parameter values (optional)</td>
</tr>
</tbody>
</table>
**Mailing Label**

### Components

1. Cross-reference for spouse
   - Forms: APACONS, APAXREF
   - Table: APRXREF

2. Constituent Mailing Information
   - Form: APACONS
   - Table: APBCONS

3. Organization Contact Information
   - Form: AOAORGN
   - Table: AOBORGN, AORCONT

4. Address Information
   - Form: APAIDEN
   - Table: SPRADDR

5. Address Selection Process
   - Report: ALPMSEL

6. Mailing Selection Table
   - Table: AMBMAIL – for future processing

7. Mailing Label Print Process
   - Table: AMBMAIL
   - Report: ALPMAIL
## Population Selections

<table>
<thead>
<tr>
<th>Reference</th>
<th>Review Using SCT Banner General, chapter 4.</th>
</tr>
</thead>
</table>

Assure that an application associated with popsel is defined in GLRAPPL.

<table>
<thead>
<tr>
<th>GLRSLCT</th>
<th>GLRSLCT – select or enter a selection ID, description, definition, and rules</th>
</tr>
</thead>
</table>

If MANUAL is checked, all joins will have to be done manually.

If LOCK is checked, only creator ID can use (GLBDATA), view (GLIEXTR), or change (GLAEXTR). A user cannot change or delete popsel rules of another creator.

<table>
<thead>
<tr>
<th>GLBDATA – (process in GJAPCTL)</th>
<th>Required parameters are:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• 01 Selection ID – the popsel name</td>
</tr>
<tr>
<td></td>
<td>• 06 Application Code – ALUMNI</td>
</tr>
<tr>
<td></td>
<td>• 07 Creator ID – creator of the popsel</td>
</tr>
</tbody>
</table>
Section L: Views, Temporary Tables and Interfaces

Overview

In this section

These topics are covered in this section.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Views</td>
<td>L-2</td>
</tr>
<tr>
<td>Collector/Temporary Tables</td>
<td>L-3</td>
</tr>
<tr>
<td>Advancement Temporary Tables</td>
<td>L-4</td>
</tr>
<tr>
<td>Advancement Collector Tables</td>
<td>L-5</td>
</tr>
<tr>
<td>Interfaces</td>
<td>L-6</td>
</tr>
</tbody>
</table>
Views

What is a view?
- The combination of relevant information from various tables into one location;
- This location is called a view;
- A view can contain up to 255 pieces of information.

View Exercises
- Describe APVCATG
- What is the advantage of using this view?
- How else would you get this information?
- Using your pidm, select your record(s)
- Review apvcatg.sql
- Describe AOVIDEN
- What is the advantage of using this view?
- How else would you get this information?
- Using your pidm, select your record(s)
- Review aoviden.sql
Collector/Temporary Tables

Collector or temporary tables are holding tables used to increase system efficiency.

Entries can be processed through:
- Online reports
- Batch processes
- Manual processes

Maintenance can be conducted through:
- SQL*Plus
- Batch processes
- Manual processes
## Advancement Temporary Tables

<table>
<thead>
<tr>
<th>Temporary tables</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• APRDCTM – Gift Society Temporary Processing Table</td>
<td></td>
</tr>
<tr>
<td>• AARRLET – Membership Reminder/Renewal Letter Table</td>
<td></td>
</tr>
<tr>
<td>• AGRTFED – Feed to Finance Temporary Processing Table</td>
<td></td>
</tr>
</tbody>
</table>

### AGRALET – Gift Acknowledgement Alumni Letter Table
- Used in reports/processes:
  - AAPACKN, AAPCARD, AAPREMD, AAPRNEW, AGPACKN
    - Data must remain in table until letter generation process is completed
    - All variables for acknowledgements and membership letters must reference this table
    - Data deleted via first parameter prior to adding new records

### APRTCFA – CFAE Temporary Processing Table
- Used in CFAE report (ADPCFAE)
- Data entered and deleted from table within process

### AGRTEMP, AGRTMP2
- Used for internal processing within processes

### APTCHIS, APTDHIS
- Used within AFIXPD process
- New to 3.0
### Advancement Collector Tables

<table>
<thead>
<tr>
<th>AMBMAIL – Mailing Address Base Table</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Populated by ALPMSEL (Alumni Label Selection Report)</em></td>
<td></td>
</tr>
<tr>
<td><em>Data can be deleted through a parameter</em></td>
<td></td>
</tr>
<tr>
<td><em>Data from this table cannot be viewed online</em></td>
<td></td>
</tr>
<tr>
<td><em>Also used as collector table in reports:</em></td>
<td></td>
</tr>
<tr>
<td>• Pledge Reminders</td>
<td></td>
</tr>
<tr>
<td>• AGPREM1</td>
<td></td>
</tr>
<tr>
<td>• AGPREM2</td>
<td></td>
</tr>
<tr>
<td>• AGPACCT (Pledge Activity Report)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SPRCOLR – Job Submission Collector File</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Used by all SCT Banner reports</em></td>
<td></td>
</tr>
<tr>
<td><em>Contains parameter values for job being executed</em></td>
<td></td>
</tr>
<tr>
<td><em>Deleted after job successfully completed</em></td>
<td></td>
</tr>
</tbody>
</table>
Interfaces

- Advancement Interface to Finance
- HR Interface to Advancement
- Student Interface to Advancement
- Advancement Supplement to the TRM, chapter 4

Advancement Interface to Finance

- Advancement to Finance Feed
- Dues to Finance Feed
- Cashier Sessions and Feeds to Finance

Diagram

```
ADPFEED

GURFEED

A/D

Finance

FURFEED

FINANCE

See Advancement Supplement to TRM, chapter 4

Continued on the next page
```
Interfaces, Continued

HR Interface to Advancement
- HR and Advancement requirements
- Advancement: pledge and pledge installments
- HR: deductions (create and approve)
- HR: deductions (payroll process)
- Advancement: gifts (pledge installment payments) from deductions
- Adjustments

Student to Advancement
- Student to Advancement interface
- Information Transferred from Student to Advancement
- Considerations
- Practice session APPSTD

Components
1. SCT Banner Student Information
   - See SCT Banner Advancement Supplement to TRM, Chapter 4, page 32+, for a list of Student tables.

2. Interface Process
   - Reports and/or updates Advancement database with students qualifying based on parameter values entered:
     - a. Degree has been awarded
     - b. No degree awarded, no registration exists as of specified term, minimum number of credits has been awarded
     - c. No degree awarded, current registration exists, minimum number of credits has been or is currently being earned.

3. SCT Banner Advancement Updates
   - Student information added to the following tables:
     - APBCONS APREHIS
     - APRCATG APRECMT
     - APRADEG APRACTY
     - APRAMAJ APRACYR

4. Interface Report
   - Indicates which students were added or updated and records carried forward to Advancement system
Section M: About SCT

Overview

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>About SCT</td>
<td>M-2</td>
</tr>
<tr>
<td>SCT’s Consulting and Modification Services</td>
<td>M-3</td>
</tr>
<tr>
<td>How To Contact SCT</td>
<td>M-4</td>
</tr>
<tr>
<td>How To Get Help</td>
<td>M-5</td>
</tr>
</tbody>
</table>
About SCT

SCT web page

- To learn more about SCT
- To access the ActionWeb
- To view SCT Education Center class schedule and more …

Visit the SCT Web Page (http://www.sct.com) and click on Education.

SCT Education Centers

- Provide centralized location for training in SCT Banner and ORACLE
- Provide environment where SCT clients can focus on learning
- Provide opportunity to interact with colleagues from other institutions

SCT's Education Centers: located in Malvern, PA, and Rochester, NY
Education Center Phone: 1-610-578-5075
FAX: 1-610-647-8517

SCT's philosophy: "Train the Trainer"

- Provide regularly scheduled, detailed, hands-on training in all modules of SCT Banner
- Provide Education Center Training Guides to be used for internal training at client sites
## SCT’s Consulting and Modification Services

<table>
<thead>
<tr>
<th>Services</th>
<th>SCT offers several short- and long-term consulting and custom SCT Banner system modification services. A combination of delivery methods can be used to meet the needs of your institution.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Contact your Professional Services Account Manager for more details.</td>
</tr>
</tbody>
</table>
How To Contact SCT

Your comments are valuable. We encourage you to call or write us at:
Systems & Computer Technology Corporation (SCT)
4 Country View Road
Malvern, PA 19355
1-800-223-7036 outside Pennsylvania (toll free)
1-610-647-5930 inside Pennsylvania
FAX: 1-610-640-5102 OR 1-610-640-5105
How To Get Help

Help sources

- ActionLine
- ActionWeb
- ActionMail
- Discussion Lists

SCT ActionLine

Use ActionLine for technical and functional requests and questions
Access ActionLine through ActionWeb, the telephone/fax, or e-mail (ActionMail)

Phone/Fax
For time-critical issues:
Phone: 1-800-522-4827
FAX: 1-610-725-7430

SCT ActionWeb

Allows clients to:
- Contact the ActionLine
- Check status of your contacts with ActionLine
- Browse Known Issues
- Review FAQ’s
- Access Additional Services/Documentation through Extended Search

Accessing ActionWeb

From the SCT Web Page (http://www.sct.com):
- Click on "Support"
- Click on "ActionWeb"

To request access to SCT’s "secured" ActionWeb pages:
- Request online at the ActionWeb login page
  or
- Send an e-mail request to: csr@sct.com
  including your name, phone #, site name

SCT ActionLine via ActionWeb

From SCT ActionWeb Page:
- Click on "Talk to us"
- Click on "Contact the ActionLine Manager"
- For functional or technical questions, click on the "click here" link

Continued on the next page
How To Get Help, Continued

**SCT ActionMail**
- Allows you to send your ActionLine questions through e-mail
- ActionMail requests/questions are given the same priority as those made over the phone
- Use this service for less time-critical issues

**Contacting ActionMail**
Send an email to **ambanalu@sct.com**
Include the following information:
- Your name
- Your institution
- Your product and release number
- Severity of problem (high, medium, low)
- Your e-mail address and phone number
- Your question (detailed description)

**SCT Discussion Lists**
SCT supports a number of useful discussion lists:
- boracle – ORACLE issues
- balumni – SCT Banner Advancement Module Issues
- bgeneral – SCT Banner General Module Issues
- breport – SCT Banner Reporting Issues
- btrain – SCT Banner Training Issues

**Listing of discussion lists**
For a complete listing of SCT’s discussion lists:
- [http://lists.sct.com](http://lists.sct.com)
  or
- Send an email to: listproc@sct.com
  - (leave the subject field blank)
  - message body: LISTS

**Via WWW:**  [http://lists.sct.com](http://lists.sct.com)
- You may join lists here and review archives
- ActionWeb username/password required

Continued on the next page
How To Get Help, Continued

SCT Discussion Lists: Subscribe

To subscribe via e-mail, send an e-mail to: listproc@sct.com

• Leave the subject field blank
• In message body:
  subscribe listname1 YourFirstName YourLastName
  subscribe listname2 YourFirstName YourLastName

You may subscribe to multiple lists in the same e-mail as long as each subscribe command is on a separate line.

SCT Discussion Lists: Unsubscribe

Send an e-mail to listproc@sct.com

• Leave the subject field blank
• Message Body:
  unsubscribe listname