



TRAINING WORKBOOK

SCT Banner Technical Training

Advancement Technical



Confidential Business Information

This documentation is proprietary information of SCT and is not to be copied, reproduced, lent or disposed of, nor used for any purpose other than that for which it is specifically provided without the written permission of SCT.

Prepared For: Release 6.x

Prepared By: SCT
4 Country View Road
Malvern, Pennsylvania 19355
United States of America

Issued: December 2003

©1992-1995, 1997, 1999-2002, 2003, Systems & Computer Technology Corporation. All rights reserved. The unauthorized possession, use, reproduction, distribution, display, or disclosure of this material or the information contained herein is prohibited.

In preparing and providing this publication, SCT is not rendering legal, accounting, or other similar professional services. SCT makes no claims that an institution's use of this publication or the software for which it is provided will insure compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting and other similar professional services from competent providers of the organization's own choosing.

"SCT," the SCT logo, "Banner" and the Banner logo are trademarks of SCT. Third party hardware and software product names and trademarks are owned by their respective third party owners/providers, and SCT makes no claim to such names or trademarks.

Section A: Introduction

Overview

In this section

These topics are covered in this section.

Topic	Page
Introduction	A-4
Workbook contents	A-5

Introduction

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: <ul style="list-style-type: none">• 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

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

In this section

These topics are covered in this section.

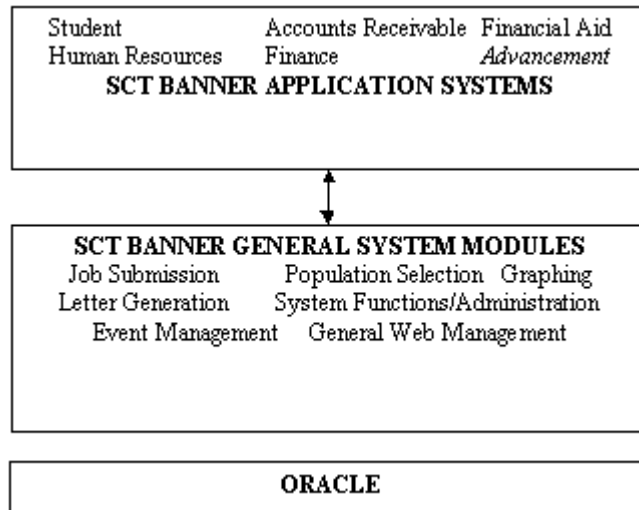
Topic	Page
SCT Banner System Overview	B-2
SCT Banner General System Modules	B-3
Introduction to SCT Banner Advancement System	B-4
SCT Banner Advancement System	B-5
Other modules	B-6

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



SCT Banner General System Modules

Job Submission	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.
Population Selection	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.
Letter Generation	This module lets you define extract variables, build paragraphs, build a letter, extract variable data from 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.
Graphing	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.
System Functions/ Administration	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).
Event Management	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.
General Web Management	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).

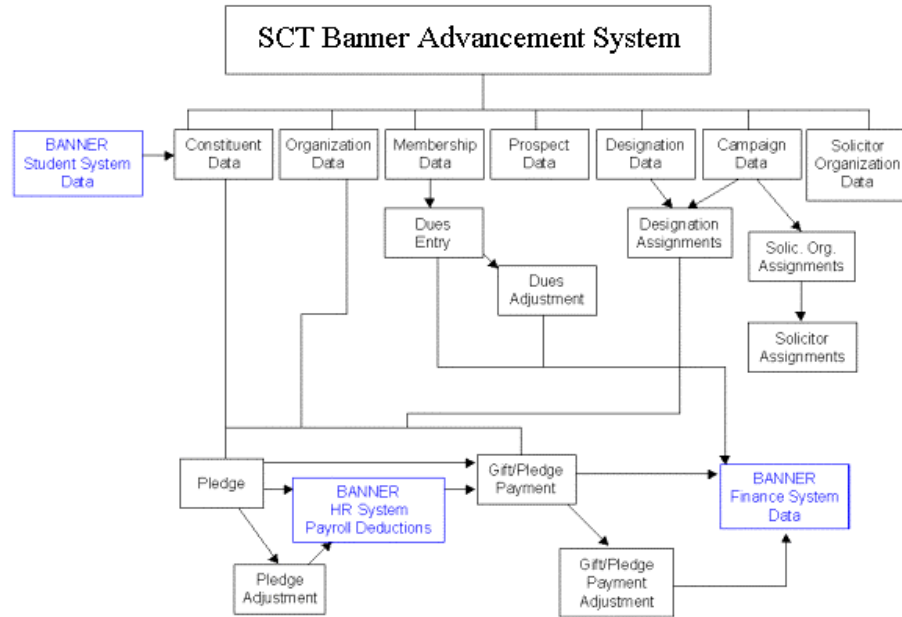
Introduction to SCT Banner Advancement System

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



SCT Banner Advancement System

Components	<ul style="list-style-type: none">• Constituent Processing• Organization Processing• Membership Processing• Prospect Management Processing• Designation Processing• Solicitor Organization Processing• Campaign Processing• Pledge Processing• Gift & Pledge Payment Processing
Constituent Processing	Establishes and maintains demographic, biographic and giving data for Advancement population.
Organization Processing	Stores matching gift information, organization contact persons, organization-specific facts for organizations such as foundations and corporations.
Membership Processing	Maintains information essential for institution membership programs. Includes dues entry, renewal and reminder letters, and membership history tracking.
Prospect Management Processing	Provides support of prospect identification, strategy plans, pool segmentation, research and tracking.
Designation Processing	Controls the accounting of gifts and pledges designated for specific funds, departments and permits interface with SCT Banner Finance.
Solicitor Organization Processing	Tracks the staff and organizations involved in the fundraising effort. Establishes solicitor organizations, assigns solicitors and monitors the effectiveness of the organization.
Campaign Processing	Tracks, controls, and summarizes the success of fundraising activities.
Pledge Processing	Establishes and maintains pledges for all constituents, dividing pledges among campaigns, designations and constituents, and creating reminders according to payment plans.
Gift & Pledge Payment Processing	Records and tracks various types of gifts, analyzes solicitation methods, records matching gifts, and reviews cashiering activity.

Other modules

Event Management	Manage events, functions, tasks, and participants.
Advancement QuickFlow	Access a set of forms in a specified sequence.
Advancement Self-Service	Provides secure, user-defined, information access through the World Wide Web.

Section C: Naming Conventions

Overview

In this section

These topics are covered in this section.

Topic	Page
Naming Conventions	C-2
Naming Convention Examples	C-4
Client-Developed Items	C-5
Columns	C-6
Validation Tables	C-7
Constraints	C-8
Primary Keys	C-9
Foreign Keys	C-10
Check Constraints	C-11
Unique Constraints	C-12
For More Information On...	C-13

Naming Conventions

Product Table Owners

Product	Table Owner
General	GENERAL
General Person	SATURN
Finance	FIMSMGR
Accounts Receivable	TAISMGR
Position Control	POSNCTL
Payroll	PAYROLL
Student	SATURN
Financial Aid	FAISMGR
Advancement	ALUMNI
Security	BANSECR

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

APAIDEN	• A	Advancement
	• P	Constituent/Person
	• A	Application form
	• IDEN	Identification

ADPFEEED	• A	Advancement
	• D	Designation
	• P	Process
	• FEED	Feed to Finance

ATVPSTA	• A	Advancement
	• T	Validation form/table
	• V	Validation form/table
	• PSTA	Pledge status code

SPRIDEN	• A	Advancement
	• T	Validation form/table
	• V	Validation form/table
	• PSTA	Pledge status code

GUAIDEN	• G	General
	• U	Utility
	• A	Application form
	• IDEN	Identification

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

Column names Application Tables (Base/Repeating) and Validation Tables column names start with the seven-character table name followed by an underscore and the column name.

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> DESCRIBE APBCONS (or DESC APBCONS)
```

```
SQL> SELECT * FROM APBCONS;
```

```
SQL> DESC ATVDONR
```

```
SQL> SELECT * FROM ATVDONR;
```

Validation Tables

Table names 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).

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

**Common
constraint types**

Five common constraint types used in SCT Banner:

- Primary key constraints – enforce unique, non-null keys;
 - 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;
 - Check constraints – enforce integrity issues specified by the check condition;
 - Unique constraints – designate a column or a combination of columns as a unique key.
 - Not Null constraints – are not named.
-

Primary Keys

Primary keys A PRIMARY KEY constraint designates a column or combination of columns as the table's primary key (unique and not null).

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 + "_" + ffffffff + "_INV_" + ppppppp +
"_CODE"
```

where FK denotes Foreign Key
n = one-up number to distinguish potential duplicates
fffffff = 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 + "_" + ffffffff + "_INV_" + ppppppp +
"_KEY"
```

where FK denotes Foreign Key
n = one-up number to distinguish potential duplicates
fffffff = 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 + "_" + cccccc  
where CC denotes Check Constraint  
n = one-up number to distinguish potential  
duplicates  
ccccc = 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 + "_" + mmmmmmm  
where CC denotes Check Constraint,  
x = a checking category  
(e.g. "R" for range, "V" for value)  
ttttttt = table name  
mmmmmmm = 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...

Resource

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

Overview

In this section

These topics are covered in this section.

Topic	Page
The Data Dictionary	D-2
Data Dictionary Views	D-3
SCT Banner Advancement Directories	D-4
SCT Banner Tables	D-5
Oracle Database Tools to Help You	D-6

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

Diagram



SCT Banner Tables

**Advancement
Tables**

Advancement Supplement for the TRM, chapter 5

**SCT Banner
General Tables**

SCT Banner General Technical Reference Manual, chapter 8

Oracle Database Tools to Help You

Tools

-
- 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
<http://www.infoboard.com/packagedoc/oradoc/DOC/server/doc/Gserver.htm>
-

Section E: PIDMs and IDs

Overview

In this section

These topics are covered in this section.

Topic	Page
PIDMs	E-2
ID Numbers	E-3
Generating a PIDM or ID	E-4

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	<p>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.</p> <p>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).</p>
Definition	<p>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.</p> <p>The next sequential PIDM to be generated is stored in SOBSEQN – Sequential Number Base Table.</p>
Notes	<p>If a PIDM has been generated externally, the SOBSEQN_MAXSEQNO must be updated for the next time a PIDM or ID is generated.</p> <p>The PIDM is not viewable to users in SCT Banner forms.</p>

ID Numbers

ID number	The ID number is viewable to users in SCT Banner forms and is stored only in SPRIDEN.
Persons	For persons, the ID is a number of choice (e.g. college ID or Social Security Number) or a system-generated ID number.
Non-persons	For Non-persons, the ID is a system-generated ID number.
System-generated IDs	System-generated IDs are unique, one-up numbers. The next sequential ID number to be generated is stored in SOBSEQN – Sequential Number Base 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.

Topic	Page
General Person Tables	F-2
Biographic/Demographic	F-3
Addresses, Telephone, Email	F-4
Key Advancement Tables by Module	F-5

General Person Tables

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> DESC SPBPERS
```

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

IDs, Names, and Biographic/Demographic

Person Constituent Non-Person Organization Information		Form	Table	Type	Req'd?
P,C,NP,O	ID Numbers	APAIDEN	SPRIDEN	Repeating	Y
P,C,NP,O	Names	APAIDEN	SPRIDEN	Repeating	Y
P,C,NP,O	Names	APANAME	SPRIDEN	Repeating	Y
P,C	Names	APANAME	SPBPERS	Base	N
P,C	Miscellaneous Bio	APAPERS	SPBPERS	Base	N

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

SPRADDR,
SPRTELE,
GOREMAL

SQL> DESC SPRADDR

SQL> DESC SPRTELE

SQL> DESC GOREMAL

**Addresses,
Telephone,
Email**

Person	Constituent	Non-Person	Organization	Information	Form	Table	Type	Req'd?
P, C, NP, O	Addresses				APAIDEN;AGAGIFT	SPRADDR	Repeating	N
P, C, NP, O	Telephone				APAIDEN;AGAGIFT	SPRTELE	Repeating	N
P, C, NP, O	Telephone				APATELE	SPRTELE	Repeating	N
P, C, NP, O	Email addresses				APAIDEN;AGAGIFT;APAEMAL	GOREMAL	Repeating	N

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.

Topic	Page
Constituent and Organization Processing	G-2
Constituents	G-3
Organizations	G-4
Constituents and Organizations: Activities, Mail, Exclusions	G-6
Constituents and Organizations: Giving History	G-7
Constituents Only: Relationships, Academics, Employment	G-8
Organizations Only: Contacts, Funds, Matching Gifts	G-9
APRXREF	G-10

Constituent and Organization Processing

Constituents and organizations

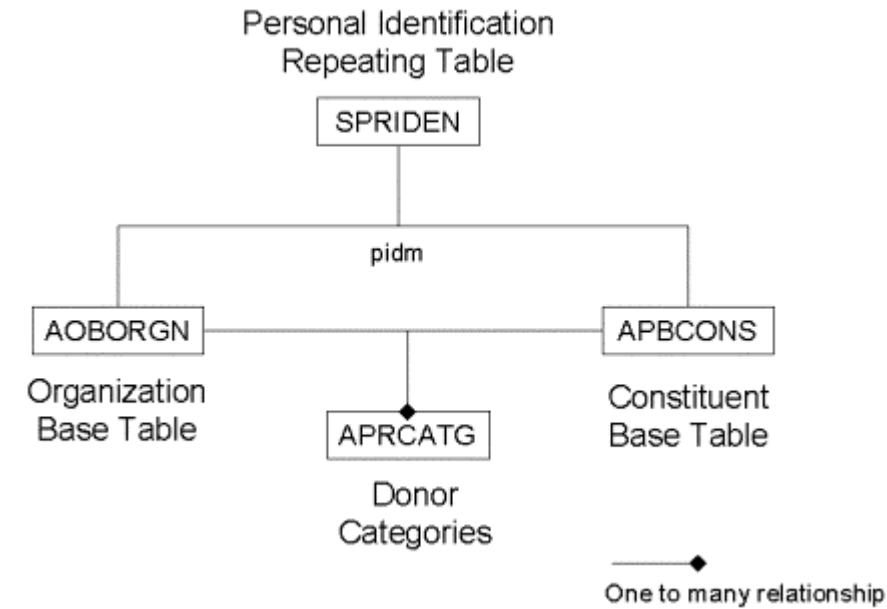
Although Constituent Processing and Organization Processing are functionally distinct in SCT Banner, technically they share many common tables.

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



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> 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> DESC AOBORGN

SQL> SELECT * FROM AOBORGN;
```

**APRCATG,
APBCONS,
AOBORGN**

Person Constituent Non-Person Organization	Information	Form	Table	Type	Req'd?
C,O	Donor Category	APBCONS;AOAORGN	APRCATG	Repeating	Y
C	Names	APANAME	APBCONS	Base	Y
O	Business, MG info	AOAORGN	AOBORGN	Base	Y

Continued on the next page

Organizations, Continued

**APACONS,
AOAORGN**

Access APACONS.

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

Perform a Next Block function.

Hold [**Shift**] and double-click on **Category** (Dynamic Help Query). This is the APRCATG_DONR_CODE.

Exit Dynamic Help Query and double-click on **Category** again (without the [**Shift**] key). This is the list of values (LOV).

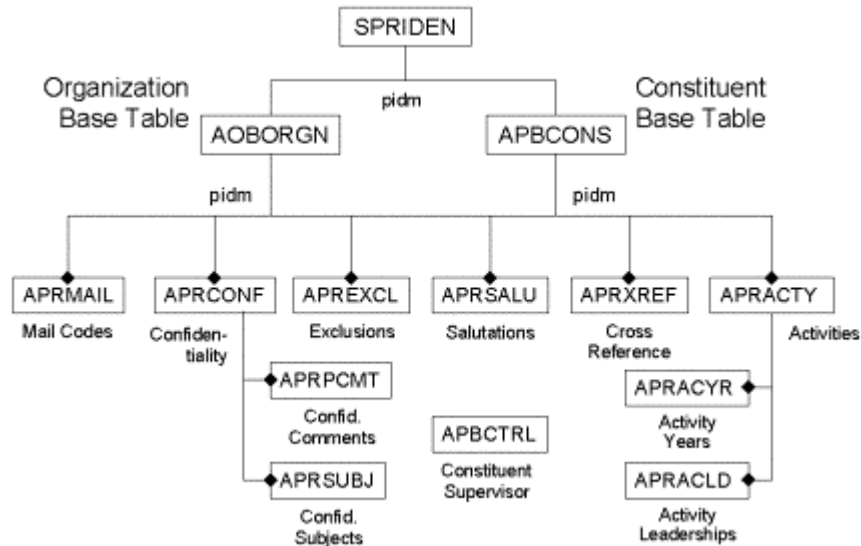
You may repeat this exercise in AOAORGN with a selected organization.

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



Organization	Information	Form	Table	Type	Req'd?
P,O	Activities	APAACTY	APRACTY	Repeating	N
P,O	Activity years	APAACTY	APRACYR	Repeating	N
P,O	Activity leadership	APAACTY	APRACLD	Repeating	N
P,O	Mailing lists	APAMAIL	APRMAIL	Repeating	N
P,O	Salutations	APAMAIL	APRSALU	Repeating	N
P,O	Exclusions	APAMAIL	APREXCL	Repeating	N
P,O	Variable purpose	APASPUR	APRVIPC	Repeating	N

Constituents and Organizations: Giving History

Tables

Constituent and Organization Processing - optional tables:

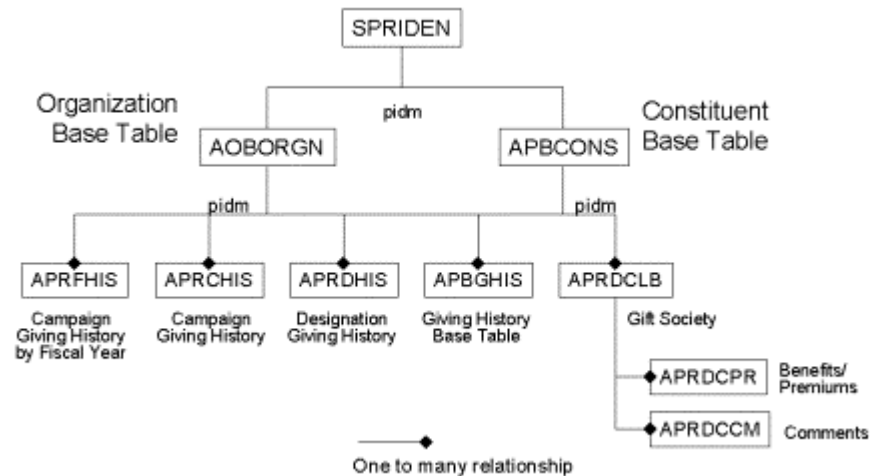
- APRCHIS – Giving History by Campaign Repeating Table
- APRDHIS – Giving History by Campaign Repeating Table
- APRFHIS – Giving History by Fiscal Year Repeating Table
- APBGHIS – Giving History Summary Base Table
- APRDCLB – Gift Society Table
- APRDCPR – Gift Society Benefits/Premiums Table
- APRDCCM – 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



Organization	Information	Form	Table	Type	Req'd?
C,0	Giving History Summary	APAGHIS	APBGHIS	Base	N
C,0	Giving History by Campaign	APACHIS	APRCHIS	Repeating	N
C,0	Giving History by Designation	APADHIS	ABRDHIS	Repeating	N
C,0	Gift Society	APADCLB	APRDCLB	Repeating	N
C,0	Gift Society Benefits/Premiums	APADCLB	APRDCPR	Repeating	N
C,0	Gift Society Comments	APADCLB	APRDCCM	Repeating	N

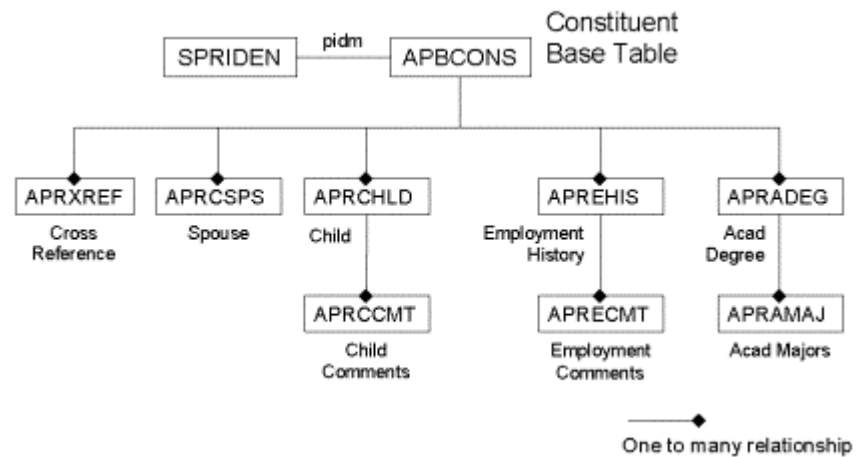
Constituents Only: Relationships, Academics, Employment

Tables

Constituent Processing - optional tables:

- Spouses
APRCSPS, APRXREF
- Children
APRCHLD, APRCCMT, APRXREF
- Degrees and majors
APRADEG, APRAMAJ
- Employment
APREHIS, APRECMT, APRXREF

Diagram



Person Constituent Non-Person Organization	Information	Form	Table	Type	Req'd?
C	Spouse	APACONS	APRCSPS	Repeating	N
C,O	Cross-references	APAXREF	APRXREF	Repeating	N*
C	Children	APACHLD	APRCHLD	Repeating	N
C	Children comments	APACHLD	APRCCMT	Repeating	N
C	Academic	APAADEG	APRADEG	Repeating	N
C	Majors	APAADEG	APRAMAJ	Repeating	N
C	Employment	APAEHIS	APREHIS	Repeating	N
C	Employment comments	APAEHIS	APRECMT	Repeating	N

*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

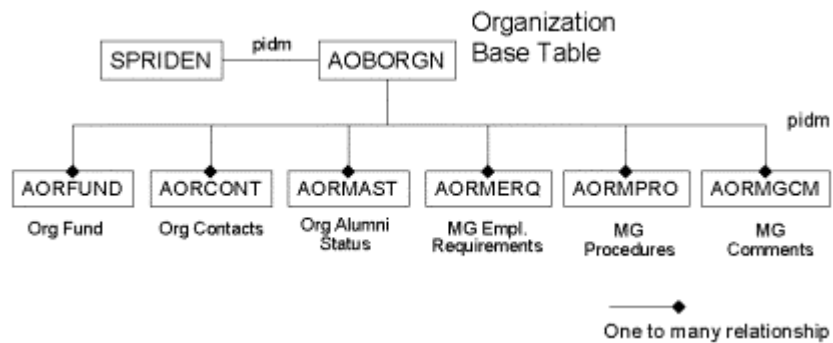
Tables

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



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

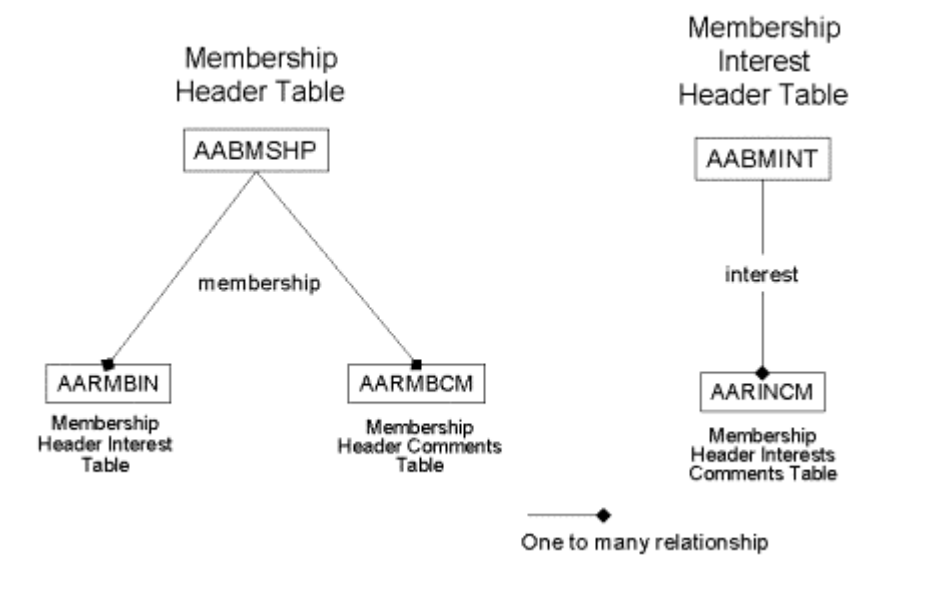
In this section

These topics are covered in this section.

Topic	Page
Membership Processing	H-2
Membership/Dues Payment Rules	H-3
Membership/Dues Payment Processing	H-4
Prospect Management Processing	H-5
Solicitor Organization Processing	H-6
Designation Processing	H-7
Campaign Processing	H-8
Campaign Designations	H-9
Pledge Processing	H-10
Pledges: Multiple (Hard) Credit	H-11
Pledges: Memo (Soft) Credit	H-12
Pledges: Solicited	H-13
Gift and Pledge Payment Processing	H-14
Gift/Pledge Payments: Multiple (Hard) Credit	H-15
Gift/Pledge Payments: Memo (Soft) Credit	H-16
Matching Gifts	H-17
Process Flow Diagrams	H-19
Summary	H-20

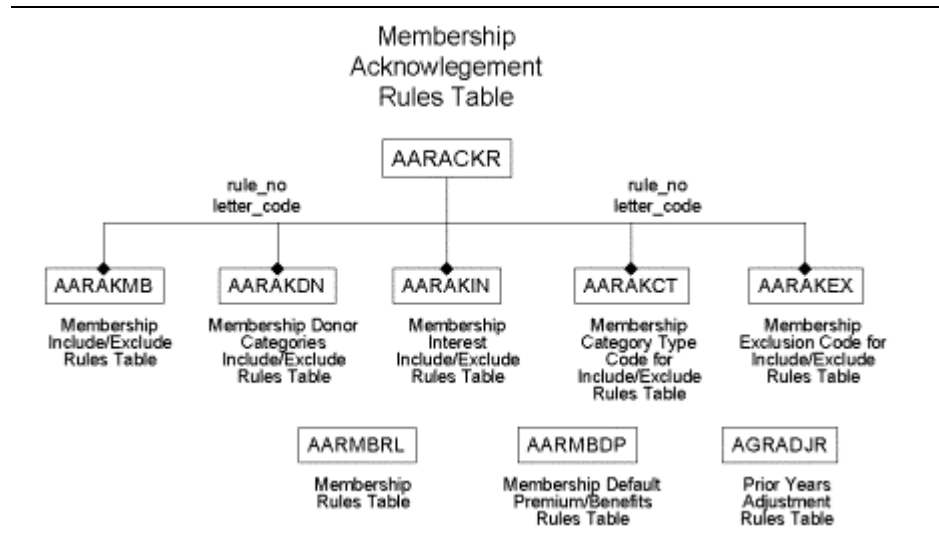
Membership Processing

Diagram



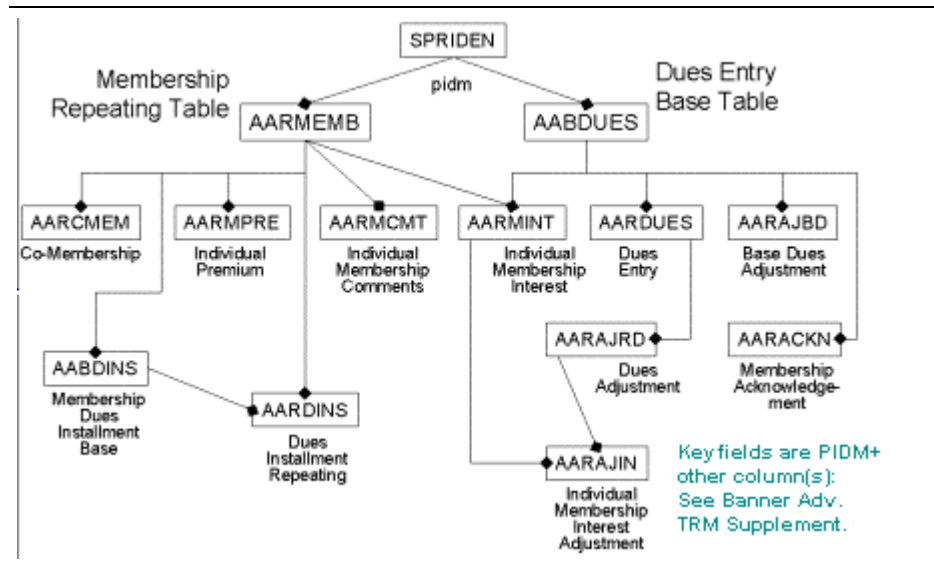
Membership/Dues Payment Rules

Diagram



Membership/Dues Payment Processing

Diagram



Prospect Management Processing

Diagram 1

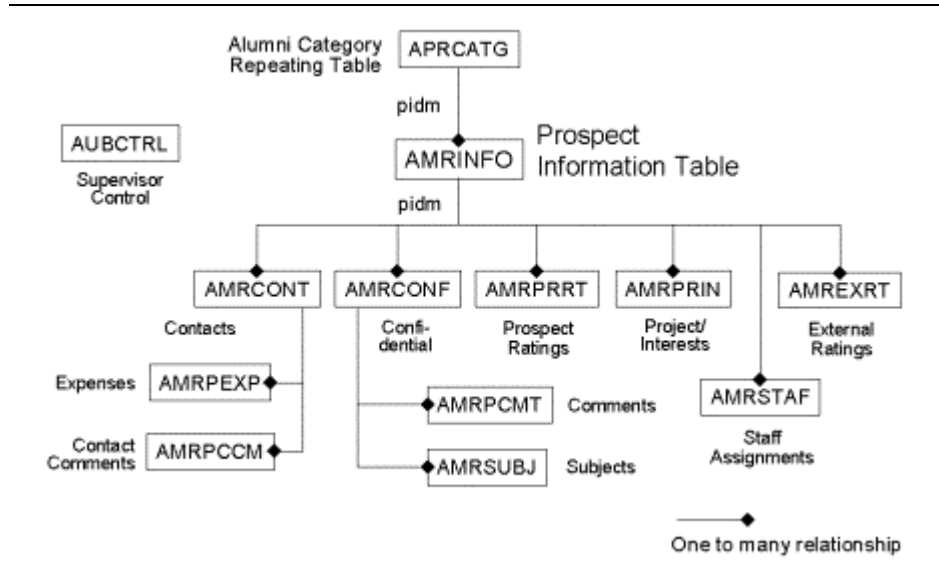
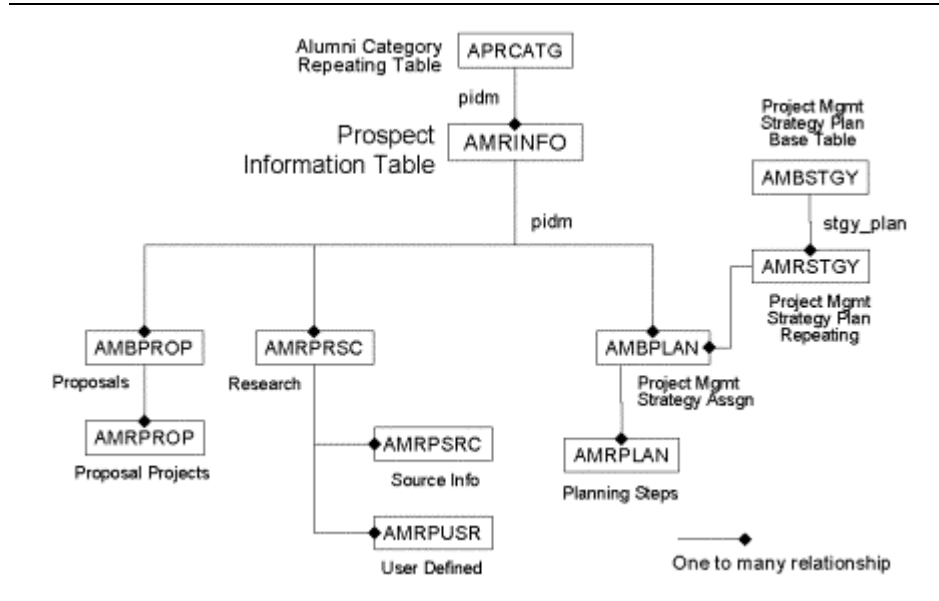
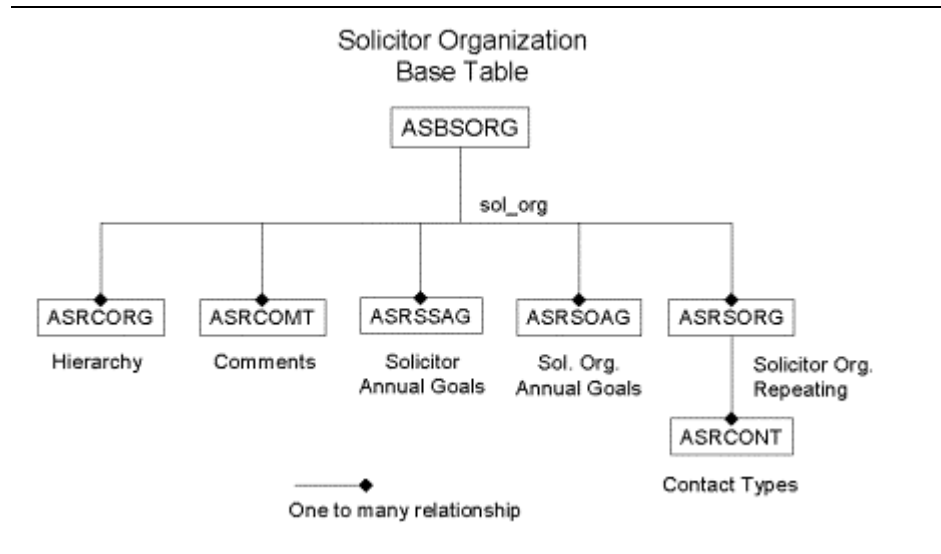


Diagram 2



Solicitor Organization Processing

Diagram



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;
```

Information	Form	Table	Type	Req'd?
Designation	ADADESG	ADBDESG	Base	Y

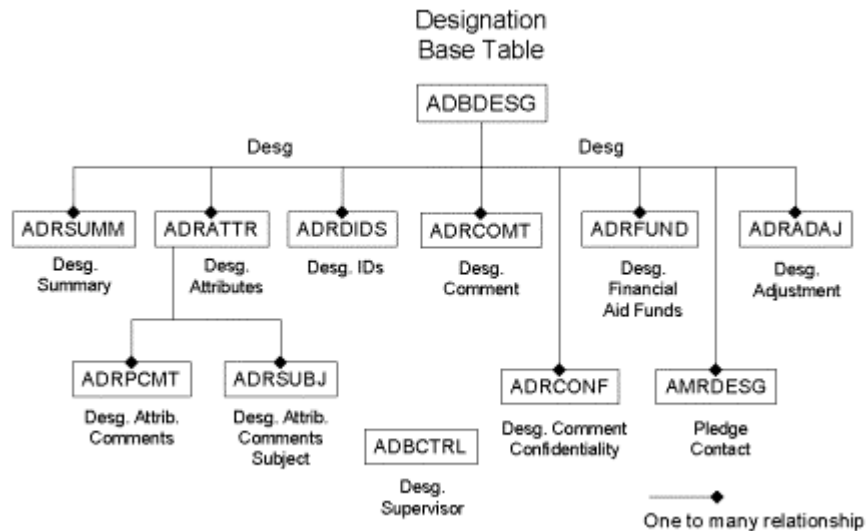
Designation Summary by FY Populated by delivered history scripts (afixpd.sql)
 ADRSUMM – Designation Summary Repeating Table, required

ADRSUMM

Information	Form	Table	Type	Req'd?
Designation by FY	ADASUMM	ADRSUMM	Repeating	Y

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

```
SQL> DESC AFBCAMP
```

```
SQL> SELECT * FROM AFBCAMP;
```

Information	Form	Table	Type	Req'd?
Campaign	AFACAMP	AFBCAMP	Base	Y

Campaign Designations

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

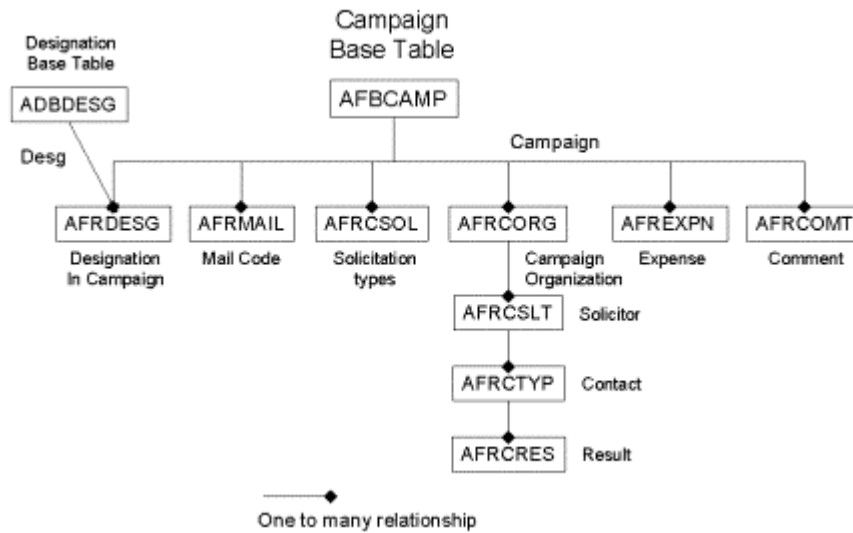
```
SQL> DESC AFRDESG
```

```
SQL> SELECT * FROM AFRDESG;
```

Information	Form	Table	Type	Req'd?
Campaign/Designation	AFACAMP	AFRDESG	Repeating	Y

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

Diagram



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;
```

Information	Form	Table	Type	Req'd?
Pledge	AGAPLDG	AGBPLDG	Base	Y
Pledge/Campaign	AGCPLDG	AGRPCAM	Repeating	Y
Pledge/Designation	AGCPLDG	AGRPDES	Repeating	Y

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

Information	Form	Table	Type	Req'd?
Pledge/Multiple ID Credit	AGAPIDS	AGBPIDS	Repeating	N
Pledge/Multiple ID Credit Detail	AGCPMLT	AGRPMLT	Repeating	N*

* 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

Information	Form	Table	Type	Req'd?
Pledge/Memo ID Credit	AGAPMEM	AGBPMEM	Repeating	N
Pledge/Memo ID Credit Detail	AGCPMMO	AGRPMMO	Repeating	N*

* Required if AGRPMEM is populated.

Pledges: Solicited

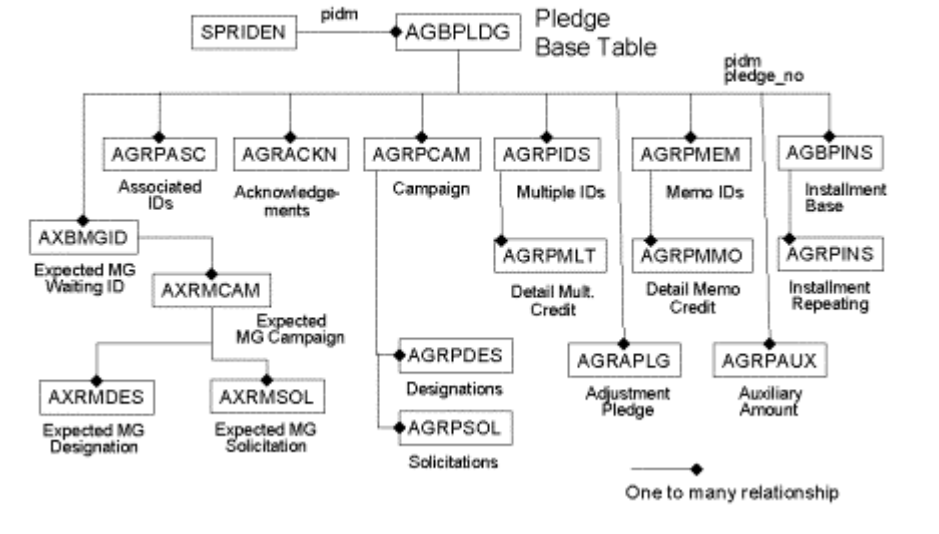
Description

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

AGRPSOL -- Pledge Solicitor Repeating Table, optional

Information	Form	Table	Type	Req'd?
Pledge/Solicitation	AGAPSOL	AGBPSOL	Repeating	N

Diagram



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).

Information	Form	Table	Type	Req'd?
Gift/pledge payment	AGAGIFT	AGBGIFT	Base	Y
Gift/pledge payment	AGAGIFT	AGBGPAY	Repeating	Y
Gift/pledge payment campaign	AGAGIFT	AGBGCAM	Repeating	Y
Gift/pledge payment designation	AGAGIFT	AGBGDES	Repeating	Y

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

Information	Form	Table	Type	Req'd?
Gift/pledge payment multiple ID	AGAGIDS	AGBGIDS	Repeating	N
Gift/pledge payment multiple ID detail	AGCGMLT	AGBGMLT	Repeating	N*

* Required if AGRGIDS is populated.

Gift/Pledge Payments: Memo (Soft) Credit

Description

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

Information	Form	Table	Type	Req'd?
Gift/pledge payment memo ID	AGAGMEM	AGBGMEM	Repeating	N
Gift/pledge payment memo ID detail	AGCGMMO	AGBGMMO	Repeating	N*

* 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.

Person Constituent Non-Person Organization	Information	Table	Type	Req'd
C,O	Matching Gift Waiting ID	AGBMGID	Base	Y
C,O	Matching Gift Campaign	AGRMCAM	Repeating	Y
C,O	Matching Gift Designation	AGRMDES	Repeating	Y
C,O	Matching Gift Identifying	AGRMGIF	Repeating	Y
C,O	Gift Memo ID Credit **	AGRGMEM	Repeating	Y
C,O	Gift Memo ID Credit Detail **	AGRGMMO	Repeating	Y

* Required for Matching Gifts.

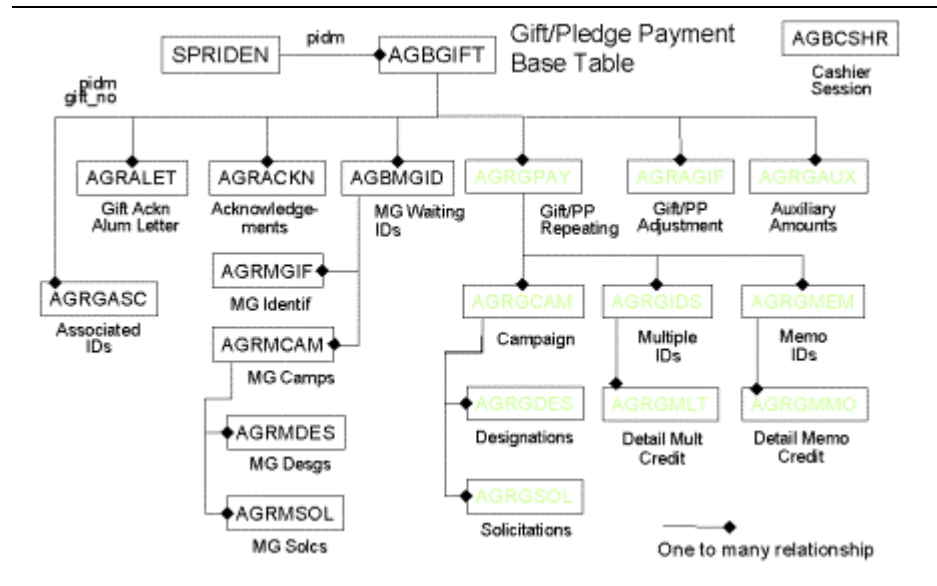
** AGRGMEM and AGRGMMO (Memo Credit) are not exclusive to Matching Gifts, but are required for Matching Gifts.

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
- and
- General TRM, Chapter 7
-

Summary

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

In this section

These topics are covered in this section.

Topic	Page
Conversions	I-2
Conversion Strategies	I-3
Conversion Steps	I-5
Conversion Considerations	I-6
Conversion Code Standards	I-7
Date Standards	I-8
Date Settings	I-9
Name Standards	I-10
Address Standards	I-11

Conversions

Notes

Conversions can be automatic, manual, or a combination of both.

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.

When doing a conversion, one must keep in mind that both form-based and table-based rules must be met.

SCT WILL HELP YOU IN DEALING WITH A CONVERSION.

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

Considerations	<ul style="list-style-type: none">• Keeping track of PIDM on legacy system; do you have multiple IDs on legacy system?• Generated ID or SSN?
Name/Address formatting	<ul style="list-style-type: none">• Avoid "#" if planning to use letter generation• If using SCT BannerQuest, check data standard on - / * + # & @ \$ reserved and special words
Address types	<ul style="list-style-type: none">• Terms must be YYYYTT (and TTs must be consistent) e.g., 01 = Spring 01 <> Fall
Date/time stamps	<ul style="list-style-type: none">• For conversion use date/time stamp – constants DATE = 01-JAN-2002 USER = CONV ORIGIN = CONVERSION

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-YYYY 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.

Date Settings: GUAINST	Form	Table	Type	Req'd?
	GUAINST	GUBINST	Base	Y

**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	<p>If SCT Banner Letter Generation is used, do not use a pound sign (#) when you enter an address.</p> <p>County codes are defined in the table STVCNTY.</p> <p>State/province codes are defined in the table STVSTAT.</p>
ZIP/Postal Codes	<ul style="list-style-type: none">• 5 or 9 digit• If you enter a 9-digit ZIP code, include the hyphen.
Nation Codes	<p>Only enter if you want the nation to appear when the address is printed.</p>

Section J: Conversion Process

Overview

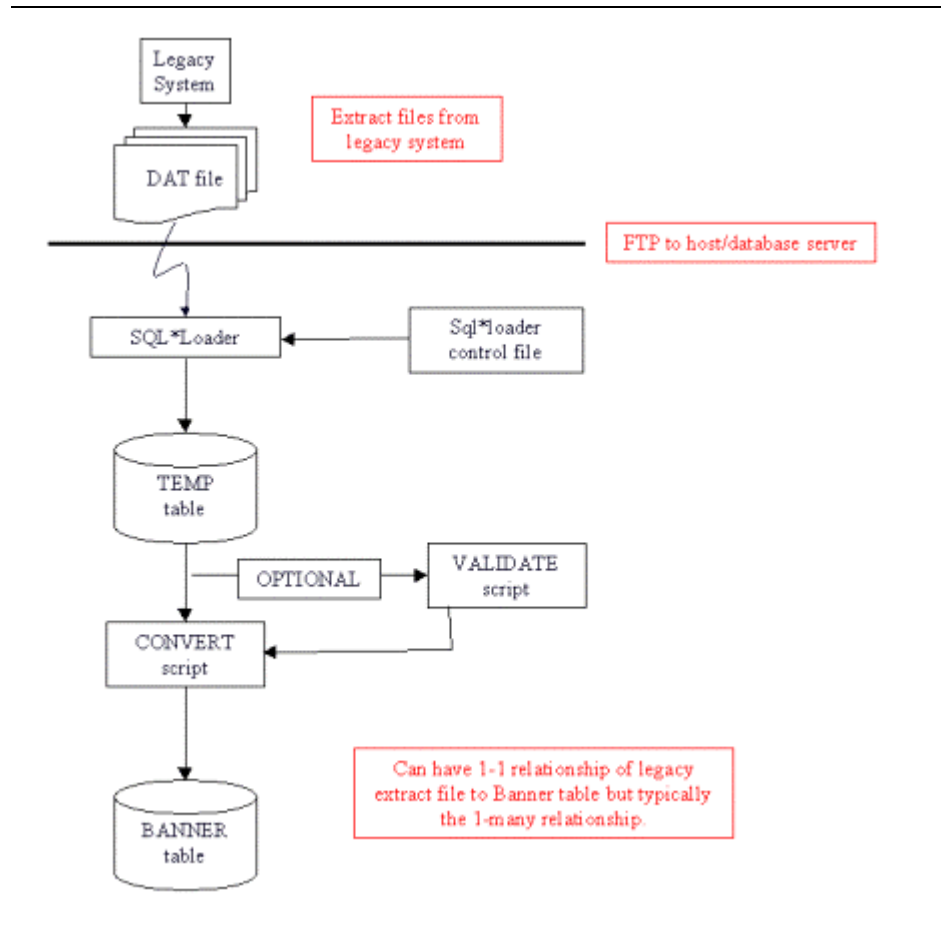
In this section

These topics are covered in this section.

Topic	Page
Conversion Process	J-2
Biographic and Demographic	J-4
Constituents and Organizations	J-5
Optional Constituent Tables	J-6
Optional Constituent and Organization Tables	J-8
Campaign and Designation	J-9
Pledges	J-10
Optional Pledge Tables	J-11
Gifts	J-12
Optional Gift Tables	J-14
Matching Gift Conversion Notes	J-15
Confirming Conversion Data	J-18

Conversion process

Diagram



Continued on the next page

Conversion process, Continued

Export legacy data

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).

Write CREATE TABLE SQL script

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 "flag" column for legacy values that are too long for SCT Banner.)

Run script in SQL*Plus: `SQL> @filename`

Write SQL*Loader control file

Write SQL*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*Loader is executed in UNIX:

```
$ sqlldr username/password  
control=controlfilename(.ctl)
```

Write PL/SQL conversion script

Write PL/SQL conversion (aka "load") script.

This script can contain "crosswalks" 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> @filename`

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

**Required
Constituent and
Organization
Tables**

- APRCATG – Alumni Donor Category
 - APBCONS – Constituent Base
 - AOBORGN – Organization Base
-

**APRCATG –
Alumni Donor
Category**

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.

**APBCONS –
Constituent
Base**

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.

**AOBORGN –
Organization
Base**

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.

Optional Constituent Tables

Tables

- APRCSPS – Constituent Spouse
 - APRCHLD – Children
 - APRCCMT – Children Comment
 - APRADEG – Academic Degree
 - APRAMAJ – Academic Major
 - APREHIS – Employment History
 - APRECMT – Employment History Comment
-

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_SBG_CODE) can be a default value which represents your institution code.
-

Continued on the next page

Optional Constituent Tables, Continued

**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

Tables

- APRACTY – Special Activity
 - APRACYR – Special Activity Years
 - APRACLD – Special Activity Leadership
 - APRMAIL – Mail Code
 - APRVIPC – Variable Purpose
 - APREXCL – Exclusion Code
 - APRSALU – Salutation
-

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 ALUMNIPEGDE 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

Tables	<ul style="list-style-type: none">• AGRPSOL – Pledge Solicitation• AGRPIDS – Pledge Multiple ID Credit• AGRPMLT – Pledge Multiple ID Credit Detail• AGRPMEM – Pledge Memo ID Credit• AGRPMMO – Pledge Memo ID Credit Detail
AGRPSOL – Pledge Solicitation	<p>If solicitation is used, you will need to input at least one of these three fields:</p> <ul style="list-style-type: none">• AGRPSOL_SOLC_CODE• AGRPSOL_SOL_ORG• AGRPSOL_SOL_PIDM
AGRPIDS – Pledge Multiple ID Credit	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• Updated when a pledge is soft credited to someone other than the donor.
AGRPMMO – Pledge Memo ID Credit Detail	<ul style="list-style-type: none">• Required if the AGRPMEM table has been populated.• A detail record is created for each campaign/designation combination of the pledge.

Gifts

Required Gift Tables

- AGBGIFT – Gift Base Table
 - AGRGPAY – Gift/Pledge Payment
 - AGRGCAM – Gift Campaign
 - AGRGDES – Gift Designation
-

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 AGBPLDG 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

**AGRGCAM –
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 AGBMGID, 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: <ul style="list-style-type: none">• 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

In this section

These topics are covered in this section.

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

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, ALUMNIPLLEDGE, 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

Reference

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.

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

Reference Review the Advancement Supplement to the Technical Reference Manual, chapter 3.

Advancement reports - UNIX

Accessing report directory:
cd /.../alumni/c>
ls -l | more

Reading a report program:
vi filename.extension
control n for next line
:q! to quit vi without saving

Advancement scripts - UNIX

Accessing script directory:
cd /.../alumni/plus>
ls -l | more

Reading a script:
vi filename.extension
control n for next line
:q! to quit vi without saving

Defining New Reports and Processes to Job Submission

Reference	Review <u>Using SCT Banner General</u> , chapter 4.
Job Submissions	Run process and reports from the Process Submission Control Form (GJAPCTL). <ul style="list-style-type: none">• Printer: DATABASE• View or Print from GJIREVO
Example: GURPDED procedure	Run from GJAPCTL, or enter GURPDED in Direct Access <ul style="list-style-type: none">• Printer: DATABASE• Enter Parameters:<ul style="list-style-type: none">• User ID: ALUMNI• Table: APBCONS
Forms	<ul style="list-style-type: none">• GUAOBS – create new process as a SCT Banner object• GJAJOBS – define new process• GSASECR – set up BANSECR security• GJAPDEF – define associated parameters• GJAPVAL – define parameter values (optional)

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

Reference

Review Using SCT Banner General, chapter 4.

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

GLRSLCT

GLRSLCT – select or enter a selection ID, description, definition, and rules

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.

**GLBDATA –
(process in
GJAPCTL)**

Required parameters are:

- 01 Selection ID – the popsel name
 - 06 Application Code – ALUMNI
 - 07 Creator ID – creator of the popsel
-

Section L: Views, Temporary Tables and Interfaces

Overview

In this section

These topics are covered in this section.

Topic	Page
Views	L-2
Collector/Temporary Tables	L-3
Advancement Temporary Tables	L-4
Advancement Collector Tables	L-5
Interfaces	L-6

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/ 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

Temporary tables

- APRDCTM – Gift Society Temporary Processing Table
 - AARRLET – Membership Reminder/Renewal Letter Table
 - AGRTFED – Feed to Finance Temporary Processing 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

-
- AMBMAIL – Mailing Address Base Table**
- Populated by ALPMSEL (Alumni Label Selection Report)
 - Data can be deleted through a parameter
 - Data from this table cannot be viewed online
 - Also used as collector table in reports:
 - Pledge Reminders
 - AGPREM1
 - AGPREM2
 - AGPACCT (Pledge Activity Report)

-
- SPRCOLR – Job Submission Collector File**
- Used by all SCT Banner reports
 - Contains parameter values for job being executed
 - Deleted after job successfully completed
-

Interfaces

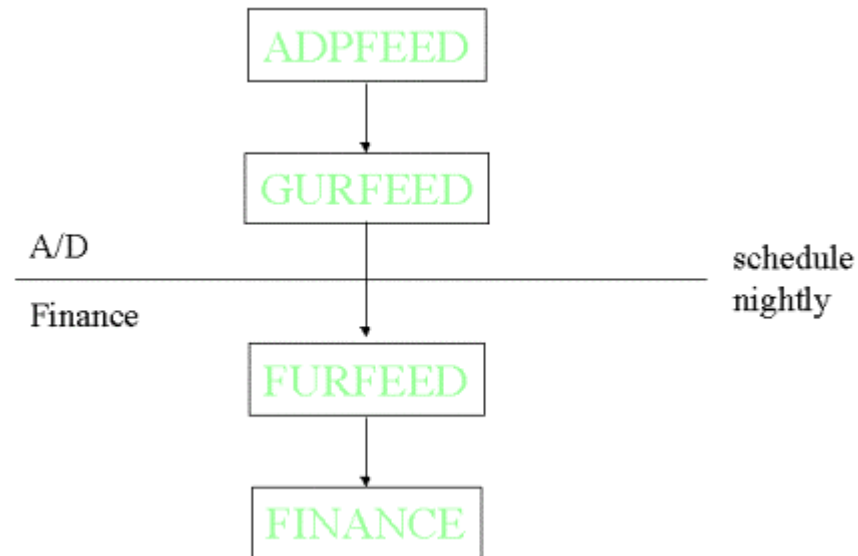
Interfaces

- 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



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 APPSTDI
-

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

In this section

These topics are covered in this section.

Topic	Page
About SCT	M-2
SCT's Consulting and Modification Services	M-3
How To Contact SCT	M-4
How To Get Help	M-5

SCT's Consulting and Modification Services

Services

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.

Contact your Professional Services Account Manager for more details.

How To Contact SCT

**Contact
information**

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>
- or
- Send an email to: listproc@sct.com
 - (leave the subject field blank)
 - message body: LISTS
- Via WWW:** <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 To subscribe via e-mail, send an e-mail to: **listproc@sct.com**

Lists: Subscribe

- 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 Send an e-mail to **listproc@sct.com**

Lists:

Unsubscribe

- Leave the subject field blank
- Message Body:
`unsubscribe listname`